Managing the WIC Card 1B - WINNIE Online Training Module

AUGUST 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides an overview of assigning the WIC Card, and managing the Primary Cardholder in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being August 29, 2023.

Overview 1

Every household is assigned one WIC Card, used to purchase food benefits issued to all members of the household.

The MN WIC Card has a unique 16-digit ID printed on its front that begins with the digits 610727.

Overview 2

The back of the card provides information about checking account balances and some reminders that should be shared with participants when the card is issued, such as:

Never writing the PIN on the card, keeping the card for future benefits, and that the WIC Card should be used before any other forms of payments when purchasing WIC foods.

<Transition Slide>

<screen description – no audio> Slide transitions from topic page to Demographics page.

Overview 3

Let's continue our work in Geri Mander's folder on the Manage eWIC Account page.

We are going to assign her WIC Card.

Assign Card 1

After we set our Primary, Sallie's row is no longer selected.

Only the Primary Cardholder can be assigned the WIC Card, so we have to reselect her row.

Re-select Sallie's row then click the Assign Card button.

Assign Card 2

<no audio> Re-select Sallie's row then click the Assign Card button.

Assign Card 3

The Assign Card modal opens with our Primary Cardholder listed as the Card Member.

Assign Card 3A

Although we could manually type the card number (or PAN – personal account number), we all should have a card reader attached to our computer.

The card reader "reads" the magnetic strip on the back of the card when we swipe it, ensuring the correct number is entered (and it's definitely faster).

Assign Card 4

Then we simply click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Assign Card 5

The Card Number displays in the Primary Cardholder's row.

Once we've assigned the card, we should write the Household ID on the back of it with a permanent marker.

Setting PIN 1

We should also jot down the Primary Cardholder's birth date and the household's mail zip code, which are needed to set the participant's 4-digit PIN.

Setting PIN 2

One of the requirements in MOM Policy 8.3. is that after we assign a card, we assist participant's with setting their 4-digit PIN using the Customer Service line.

If they choose not to have us assist them, we must be sure to inform them that they cannot use their card to buy WIC foods until the PIN is setup.

More information about how to help set the PIN is available in the Customer Service training module.

WIC STAFF: I'd like to help you set your 4-digit PIN using the Customer Service line. You will need to set it before you can use your card to buy WIC foods.

Send eWIC Data 1

Almost any change we make to this page must be saved by communicating it to the WIC Processor, which we do by clicking the Send eWIC Data button.

Send eWIC Data 2

The WIC Processor provides real-time transactions for purchases of WIC foods using the WIC Card.

It stores household account, issuance, redemption, and transaction information for MN WIC, and WINNIE communicates with it in real-time.

Although we say "on the WIC Card", benefit information isn't actually stored on the card.

It's stored at the WIC Processor and the WIC Card is used to access it.

Send eWIC Data 3

If we were to try to leave this page after making changes and before clicking the Send eWIC Data button, WINNIE will inform us that we have unsaved changes and ask if we are sure we want to leave the page.

Clicking Yes will undo all of our changes, just as effectively as clicking the Cancel button.

Send eWIC Data 4

Save our changes and communicate them to the WIC Processor.

<no audio> Click the Send eWIC Data button.

<Waiting>

<screen description – no audio> Spin icon and "Working…please wait" display.

<Waiting>

<screen description – no audio> Spin icon and "Working…please wait" display.

Signature 1

We are required to capture the Primary Cardholder's signature when a WIC Card is assigned to acknowledge receipt of the card, as well as whenever we update or change the Primary Cardholder's information.

Signature 2

If the signature pad is working and we are unable to collect the signature, we should write the reason why on the sig pad and then use one of the other options available to us to obtain the signature, including:

<Transition Slide>

<screen description – no audio> Slide transitions from Manage eWIC Account page to MOM, Exhibit-B.

Signature 3

… MOM, Exhibit 5-B: Registers for Manual Signatures.
(https://www.health.state.mn.us/docs/people/wic/localagency/program/mom/exhbts/ex5/5b.docx)

Click the button to continue.

Signature 4

The REDCap Participant Signature Form.
(https://redcap.health.state.mn.us/redcap/surveys/?s=TDCP4PEJPT)

Click the button to continue.

Signature 5

Or some other electronic signature platform, such as DocuSign.

if the signature pad is **not** functioning, these same options should be used to collect the signature.

Any time a signature is not captured in the system and one of these other methods is used, we must import the electronic document or scan a paper copy into the appropriate household members' folders (in this case, it would be into both Geri's and Sallie's folders).

Signature 6

To begin the capture process, we can either click the Capture Electronic Signature button, or since it's the page focus, we can press the Enter key on our keyboard.

Do one or the other.

<no audio> Click the Capture Electronic Signature button or press the Enter key on the keyboard.

SWIPe 1

Whenever we see this, after clicking that button (or pressing Enter) and it spins for more than a brief second, we should be clued in that we forgot to turn on our SWIPe.

SWIPe 2

Unfortunately, the message that displays says: The USB HID service is not responding and to verify that it is connected, running, and unblocked.

The USB HID service is oddly enough, Human Interface Device, but what it **means** is…

SWIPe 3

…turn on your SWIPe!

SWIPe 4

…once SWIPe is on, we can minimize it…

<no audio> Click to minimize SWIPe.

SWIPe 5

…and click the Capture Electronic Signature button again.

Signature 7

The Capture Signature for Card modal opens.

The card number and Primary Cardholder display along with the statement that the signature indicates the participant received an EBT card.

The statement that displays in the box is the same one that displays on the sig pad screen the participant is signing: I acknowledge I have received and accept responsibility for the following eWIC card (and their card number).

When they tap Next with the stylus…

Signature 8

… and as they write their signature, it displays on our screen.

If they accidentally tap the Cancel button…

<Transition Slide>

<screen description – no audio> Slide transitions to modal with "Signature Canceled by User".

Signature 9

….a message will display on the modal and we will need to click the Capture Electronic Signature button again and it will start the process over.

<Transition Slide>

<screen description – no audio> Slide transitions back to signature pad screen.

Signature 9A

When they tap the OK button…

Signature 10

… the Save Signature button is now our focus, and we can either click it or press the Enter key to select it.

If we click the Cancel button…

Signature 11

…a signature record is still created and stored in the database.

When viewing the record in Card History, which we'll look at in another training module, Signature Not Available displays in the Signature box.

To state the obvious, this signature record does not meet the requirement for capturing the signature, and we would have to use one of the other forms or methods to capture it.

Signature 12

However, we're going to click the correct button.

Click Save Signature or press the Enter key.

<Waiting>

<screen description – no audio> Spin icon and "Working…please wait" display.

Primary Display 1

Notice the Primary Cardholder is not yet displaying at the top of our page.

The page needs to "refresh" to display that, so we'll see it populate in a minute.

Change Primary 1

Now let's take a look at changing our Primary Cardholder to Jerry.

Go ahead and make Jerry our Primary Cardholder.

Follow the cues provided and click anywhere for a hint.

<no audio> Double-click to edit.

<no audio> Make Jerry the Primary Cardholder. Follow the cues provided. Click anywhere for a hint.

<audio – hint> Double-click the Alternate Rep 1 - Mander, Jerry row.

Change Primary 2

Just a quick side note: notice our Primary Cardholder has populated.

OK. Continue…

<no audio> Make Jerry the Primary Cardholder. Follow the cues provided. Click anywhere for a hint.

<no audio> Do NOT use the Calendar Control icon.

<audio – hint> Click into the Date of Birth field.

1900 Birth Dates 1

For birthdays with years that begin with 19, we have to type all 4 digits for the year.

Otherwise, the system will auto-fill the first two digits with 2-0, resulting in a date in the future, and a validation to display.

Go ahead and continue. Typing 8/25/1948 into the field.

<no audio> Make Jerry the Primary Cardholder. Follow the cues provided. Click anywhere for a hint.

Change Primary 3

<no audio> Make Jerry the Primary Cardholder. Follow the cues provided. Click anywhere for a hint.

<audio – hint> Click the Update button.

Change Primary 4

<no audio> Make Jerry the Primary Cardholder. Follow the cues provided. Click anywhere for a hint.

<audio – hint> Double-click the Alternate Rep 1 - Mander, Jerry row.

Change Primary 5

<no audio> Make Jerry the Primary Cardholder. Follow the cues provided. Click anywhere for a hint.

<audio – hint> Click the Set Primary button.

Change Primary 6

Remember, the card can only be assigned to our Primary Cardholder, so when we change the Primary Cardholder, the system automatically "reassigns" the card to that representative.

Continue making Jerry our Primary Cardholder.

<no audio> Make Jerry the Primary Cardholder. Follow the cues provided. Click anywhere for a hint.

<audio – hint> We must always communicate our changes to the WIC Processor. Click the Send eWIC Data button.

<Waiting>

<screen description – no audio> Spin icon and "Working…please wait" display.

Change Primary 7

<no audio> Make Jerry the Primary Cardholder. Follow the cues provided. Click anywhere for a hint.

<audio – hint> Click the Capture Electronic Signature button or press the Enter key.

Change Primary 8-9

<no audio> Wait for it…

<no audio> Make Jerry the Primary Cardholder. Follow the cues provided. Click anywhere for a hint.

Change Primary 10

<no audio> Make Jerry the Primary Cardholder. Follow the cues provided. Click anywhere for a hint.

<audio – hint> Click the Save Signature button or press the Enter key.

Change Primary 11

OK. So, Jerry is now officially our Primary Cardholder.

Notice, Sallie is still listed at the top, and will continue to do so, until our page refreshes.

Set PIN 3

Previously, we jotted down Sallie's birth date for setting the PIN.

Whenever we change a Primary Cardholder, we need to make sure to let our representative know that the date of birth used to validate with Customer Service has changed to the new Primary Cardholder's birth date.

Set PIN 4

Same goes if their mail address zip code changes.

We must always make sure we communicate that the Customer Service card identity validations change with them.

> WIC STAFF: So, you'll use Jerry's birth date and your mail address zip code when you call the Customer Service line.

Delete Primary 1

Remember this statement from the last module?

We can delete any representatives as long as a WIC Card has not been assigned to them.

This means, we cannot just delete the Primary Cardholder.

Let's see what happens if we try to delete our Primary Cardholder, Jerry.

Do you remember how to delete? Use the double-click to get there. Click anywhere for hints.

<no audio> Delete the Primary Cardholder, Jerry. Use the double-click. Click anywhere for hints.

<audio – hint> Double-click the Alternate Rep 1 - Mander, Jerry row.

Delete Primary 2

Quick aside: Notice the page refreshed and Jerry now displays as the Primary Cardholder at the top of the page.

Continue…

<no audio> Delete the Primary Cardholder, Jerry. Use the double-click. Click anywhere for hints.

<audio – hint> Click the Delete button.

Delete Primary 3

A very informative message displays when we try to delete our Primary Cardholder.

It begins with: Deleting the cardholder will deactivate the WIC Card.

Not what we want to do.

Delete Primary 4

Next, the message gives us two options.

One. If we want to delete the Primary Cardholder **and deactivate** the card, click the Yes button.

Two. If we want to reassign the card to another representative **first**, that is **before we delete our rep**, click the No button.

We are choosing option 2.

Click the No button.

Delete Primary 5

So, deleting the representative who is the Primary Cardholder also deactivates the WIC Card.

Notice there is no option to reactivate a card.

Delete Primary 6

To sum it up, if we want to completely delete a rep that is the Primary Cardholder, we must choose another rep to set as primary first, and then we can delete them.

Delete Primary 7

If we are adding a representative that is replacing our current Primary Cardholder, we can simply edit the Primary Cardholder and update their information.

We need to note that both of these changes would require us to obtain signatures from the new Primary Cardholder.

Relationship 1

We'll talk about deactivating cards in the next training module.

To finish this one…

In the last training module, we said that the relationship we select displays for our representatives on another page.

Do you remember where? Go ahead and open that page or click anywhere for a hint.

<audio – hint> Relationships display in the Household panel on the Demographics page. Select Demographics from the sidebar.

<Waiting>

<screen description – no audio> Spin icon and "Working…please wait" display.

Relationship 2

Yep. Our representatives, and their relationship, display in the Household Information panel on the Demographics page.

Go ahead and hover over the icon in that section to see its tool tip, then click it.

Representative Hx 1

The Authorized and Alternate Representative History modal opens and provides a snapshot of changes made to the **representative** information.

The first record was created when we completed our Prescreen and the system automatically saved Sallie as the Authorized Rep, since she was a woman in the household.

The second record was created when we clicked the Send eWIC Data button after assigning the card.

Click the Close button when ready to continue.

Auth Rep Info 1

Last thing…click below the scroll bar…

Auth Rep Info 2

Click the Edit button in the Household Info panel.

Auth Rep Info 3

We also have an abbreviated, read-only view of the Authorized Representative's information in the Household Demographics modal.

<Transition Slide>

<screen description – no audio> Slide transitions from Household Demographics page to Test Your Knowledge page.

Test Your Knowledge

True/False Q#1

Deleting the Representative who is set as the Primary Cardholder will deactivate the WIC Card.

Answer #1

The answer is True.

We cannot delete the Representative who is also the Primary Cardholder without deactivating the WIC Card. We can set another representative as Primary, then delete, or edit the current Primary Cardholder if adding someone new who is going to be the Primary.

End

End Slide

Thank you for reviewing this WINNIE online training module presented by the Minnesota Department of Health WIC Program.

If you have any feedback, comments, or questions about the information provided, please submit the WINNIE Questions for the State WIC Office form.

Minnesota Department of Health - WIC Program, 625 Robert St N, PO BOX 64975, ST PAUL MN 55164-0975; 1-800-657-3942, health.wic@state.mn.us, www.health.state.mn.us; to obtain this information in a different format, call: 1-800-657-3942.

This institution is an equal opportunity provider.