

# Participant Search 2 – WINNIE Online Training Module

MARCH 2023

## Introduction

### Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides the second overview of Participant Search in WINNIE, the MN WIC Information System.

## Search Continued

### <Transition Slide>

<screen description – no audio> Slide transitions from Topic slide to Participant Search page.

### Smart Searches

There are a multitude of ways to find a participant, and despite this, it can still be challenging to find exactly the person we may be working with.

Just remember, the more specific our criteria, the better.

The State WIC ID is as specific as it gets.

It is a unique 8-digit number that never changes once it's assigned to the participant when their WIC record is first created.

Click into the State WIC ID field.

### SWID-Enter Key

We'll note that preceding zeroes are not required for any of the number fields, including date fields.

Type 1340339, but this time press the Enter key on the keyboard instead of clicking the Search button.

<no audio> Type 1340339 and press the Enter key on the keyboard.

## One Record

Only one record displays because only one participant will ever have that State WIC ID.

The State WIC ID is not an ideal search when working with participants simply because a participant rarely **knows** their State WIC ID.

However, the State WIC ID is the most frequent identifier used in reports so is often used when looking participants up for reasons other than direct services.

Notice that when a search is performed using a number, the other fields are disabled.

Click the Clear button.

## Household ID

The Household ID is also a unique 8-digit number assigned when a WIC record is created for the first member of a family.

It is then shared by all subsequent family members and links their records together, as we saw previously.

The Household ID can change. For instance, a member of a household may be assigned a different household ID if moved into foster care.

## HHID on Card

We should always write the Household ID on the back of the WIC card so the participant might be able to provide this number.

Click into the Household ID field.

## Household ID 1

Let's search for Household ID, 01000014, again without a preceding zero, and using the Enter key to start the search.

## HHID Results

Any members of the household that belong to our search database will display in the results.

Click Clear again.

<no audio> Click the Clear button.

## Card Number

The Card Number is the unique 16-digit number on the WIC Card.

Since only one card is assigned at a time to each household, the number is the same for all members.

## Card Validations

We can search for both active and deactivated cards although there is no indication if a card has been deactivated in the search results.

However, the system does verify whether the card number begins with the correct digits for MN WIC Cards, is the correct length of 16 digits, and is a valid number that has, at one time, been assigned and active.

## Enter Card Number

We can use our card scanner to scan this number accurately and efficiently into the search field or type it manually.

Click into the Card Number field.

## Card Number

Let's search for card number 6107279300000006 and hit the Enter key on our keyboard again instead of clicking the search button.

<no audio> Type 6107279300000006 (that is 7 zeros in a row) and press the Enter key on the keyboard.

## Card Results

This card belongs to the Horse household.

Click the Clear button.

## <Transition Slide>

<screen description – no audio> Slide transitions from cleared search screen to blank information slide.

## Autosave Message

Our browser may ask us to save the card number each time we search by a card number.

We have to adjust our browser settings if we no longer want to see this message.

Since we are already familiar with browser Settings, we will just provide the steps to ensure the message doesn't display again instead of walking through them.

## Select Browser

Select your browser.

## Google Chrome

For the following information, please note that browser features and pages may change between when this module was developed and when it is viewed.

Click the button to continue.

### Chrome 1

Click the ellipses icon in the top right corner of the browser.

Select Settings from the menu.

Select Autofill on the left sidebar.

Select Payment methods.

Click the button to continue.

### Chrome 2

Toggle off Save and fill payment methods.

Close the browser tab.

Click the button to continue.

## Microsoft Edge

For the following information, please note that browser features and pages may change between when this module was developed and when it is viewed.

Click the button to continue.

### Edge 1

Click the ellipses icon in the top right corner of the browser.

Select Settings from the menu

Profiles is auto-selected on the left sidebar.

Click the button to continue.

### Edge 2

Select Payment info.

Click the button to continue.

## Edge 3

Toggle off Save and fill payment info.

Close the browser tab.

Click the button to continue.

## More Searches

Unique numbers are the most efficient and accurate search methods, but these are not always known by the participant, especially when we aren't communicating in person or if a participant is returning to the program after a period of time.

So, we can also search by names and date of birth.

Note that we are not required to enter preceding zeros, nor do we have to enter years with 4 digits.

Click into the Date of Birth field.

<no audio> Click into the Participant Date of Birth field.

## Enter DOB

Let's find a participant with a date of birth of 7/5/21, using the Enter key again to start the search.

<no audio> Type 7/5/21 and press the Enter key on the keyboard.

## Names

Depending on the size of our search, for instance statewide versus clinic, searching by date of birth can render a lot of results.

When searching by names and/or date of birth, the other demographic fields remain enabled so that we can do a search using any combination of them.

We can search for a participant using full or partial participant names, or just initials, or any combination, and can also extend our search capabilities by clicking the Auth Rep button.

<no audio> Click the Auth Rep button.

## Auth Rep

The Authorized Representative is the primary caregiver for a household.

It is often the mother if she is also on WIC and part of the household.

All the name fields accept spaces, apostrophes, hyphens, commas, and periods but **not** numbers.

## Demo Searches

Let's look at this scenario.

A woman left a message about her young pregnant daughter for whom she is the authorized rep and leaves **her** name but we can only hear that her last name is "comet".

Let's see if we can find her.

Click into the Authorized Rep Last Name field.

## Auth Rep search

Type "Comet" and press the Enter key to start the search.

<no audio> Type "comet" into the Authorized Rep Last Name field and press the Enter key to start the search.

## Auth Rep Results

When searching by names, WINNIE will search the database for anything that **begins with the exact same letters** we entered.

Let's look at what that means.

Click the Clear button.

## Search Last Name

We are going to search for Mary Thon.

Click into the Participant Last Name field.

## Type Last Name

Type "thon" then click or tab into the Participant First Name field.

## Type First Name

Type "mary" then press the Enter key on the keyboard to start the search.

## Exact Match

Notice the two results both begin with exactly what we entered for our search: thon and mary.

Click the button to continue.

## Include Phonetics

The Include Phonetics toggle broadens our search of **Participant First and Last Name** to include names that have a similar **sound**. This is called a SOUNDEX SEARCH.

Toggle on Include Phonetics.

## Phonetic Search

Click the Search button...

## Phonetic Results

...and view the change in the search results.

Click below the scroll bar.

## Phonetic Results 1

The Phonetic search may be useful if we aren't sure how a name is spelled.

Click the button to continue.

## <Transition Slide>

<screen description – no audio> Slides transitions from phonetic search results to cleared Search screen.

## Wild Card

Another tool if we aren't sure of a name is a wild card search.

A wild card uses the percent sign (%) to represent unspecified letters.

For instance, if we know their name was Anderson or Addison or Amundson, and their first name began with a B.

We could type a%son for the last name and b for the first name and see what comes up.

Let's try it.

Click into the Participant Last Name field.

## Wild Card LN

Type a%son then click or tab into the Participant First Name field.

## Wild Card FN

Type "b" then press the Enter key on the keyboard to start the search.

## Wild Results

<screen description> Addison, Brie Cheese and Anderson, Berry Picker were returned.

Click the button to continue.

## Show Details

### Date

All dates in the next section are based on today's date being: March 3, 2023.

### <Transition Slide>

<screen description – no audio> Slide transitions from date slide to Participant Search page with Household ID 13710001 search results: Charlie, Clyde-Dale and Rhoda Horse.

## Toggle on Show Details

Once we've found the correct participants, in this instance the Horse household, we can view more information by toggling on Show Details.

Best practice is to **always** view Show Details before opening a participant folder since it provides a snapshot of their status.

Go ahead and toggle on Show Details.

## Show Details

The Show Details card displays to the right of the highlighted or selected card.

### <Transition Slide>

<screen description – no audio> Transition from Horse household in Search results back to Thon/Thonner search results to demonstrate Show Details when scrolling.

## Scroll

It stays at the top of our viewable page when we scroll.

<screen description – no audio> Page with more search results (Thon/Thonner). As the user scrolls down the page, the Details card remains just below the Search Criteria section.

### <Transition Slide>

<screen description – no audio> Transition from Thon/Thonner search results back to Horse household in Search results.



## Details Card

Let's click below the scroll bar to view the whole Details card.

## Details Header

The Details card header tells us if the participant is High Risk and uses bright yellow as a visual indicator of high risk.

If there is a priority alert, its subject will display on the header of all household members. We'll learn more about priority alerts in the Manage Alerts training module.

Within the card, there are basically four informational sections: Demographic, Certification, Appointment, and Benefit Issuance.

## Demo Info

The demographics section has some of the same info as the participant card. It also provides quick access to the household telephone numbers.

## Cert Info

The Cert section tells us when their most recent certification began and the last date of their current eligibility, as well as whether a midcert is due or overdue, and whether it has been completed.

If their current certification has been terminated, the date and reason display here.

## Failure to PU

Some of the most common reasons the system terminates certifications during End-of-Day are:

- Failure to pick-up because the participant hasn't been issued benefits for two months.

## Cert Expired

- Certification Expired because the participant was eligible to be recertified but hasn't been within 31 days of their Cert End Date.

And if we click on Rhoda's card...

## Cat Ineligible

- Categorical Ineligibility because the participant was not eligible to be recertified and End-of-Day terminates the cert on the same date their cert ends.

Go ahead and click on Charlie's card again.

## Appt Info

If an appointment has been scheduled, information about the next appointment displays as long as the date and time is still in the future.

We should note that the appointment could potentially be scheduled at a different clinic than we are working in. This can occur if the participant is transferred from another agency or clinic and the appointment wasn't deleted.

## Benefit Info

The Benefit Information section provides a slew of information beginning with whether the participant is issued benefits for three months, two months or one month at a time.

It displays the last 3 most recent sets issued and their benefit cycle, which is when they can first start using benefits each month, or the Printed First Date to Use (PFDTU), and when they expire each month, or the last Date to Use (LDTU).

### Benefit Info 1

A couple other things this tells us, and we'll learn more about what we can interpret from these dates in the Benefit Issuance training modules.

- First, Charlie missed receiving benefits for January since none of the benefit cycles have a PFDTU , or begin, in January.
- Second, he's due to receive benefits again in March since his last issued set expired in March.

## Status Voided

One last thing, if any of these sets were voided, and not reissued, Voided displays under Status. Go ahead and click the Clear button.

## Clear Details

A couple of other things to note about the search screen:

To keep the search process efficient, every time we perform a new search, the Details card collapses, and Show Details must be toggled on again.

However, during a WINNIE session, the search results are maintained when navigating away from and back to the Search page until they are cleared.

## Test Your Knowledge

### T/F Q#1

True or False?

We can toggle on Include Phonetics to broaden our search by Participant and/or Authorized Rep First and Last Names.

### Answer #1

The answer is False.

The Include Phonetics toggle will only broaden our search for the **Participant** First and Last Names.

### T/F Q#1

True or False?

We can search for deactivated card numbers, but the system will not inform us that the card has been deactivated.

### Answer #1

The answer is True.

We can still search for card numbers once the WIC Card is no longer active, but no messages or indicators display to inform us the card has been deactivated.

## 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.

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