VOCs 1C – Completing VOC in Folder – WINNIE Online Training Module

FEBRUARY 2024

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is an overview of completing the VOC for new applicants by entering information into the Participant Folder in WINNIE, the MN WIC Information System.

Date 1

All dates in this module are based on today's date being February 6, 2024.

<Transition Slide>

<screen description – no audio> Slide transitions to the Overview page.

Overview 1

We are still working with the Dio family.

As best practice, there is a lot of information we still need to enter into the Participant Folder to complete the VOC.

Keep in mind that the order in which we complete them in the modules, such as completing documentation requirements first, may not lend itself to our own clinic flow.

Overview 2

The few tasks we'll complete in this module fall under the heading of providing WIC Services, which include:

- Providing and documenting Nutrition Education based on risk factor assessment.
- Making referrals, as appropriate.
- Reviewing the Rights and Responsibilities for which a signature is not required.
- Assigning and explaining the MN WIC food package (and WIC App).
- Assigning a WIC Card.
- Issuing benefits.

▪ Determining follow-up appointments.

Refer to MOM, Section 3.3 – Transferring Participants for more detailed information about providing WIC services for a VOC.

Add Risk Factors 1

We'll start where we ended the last module, on the Risk Factors page in Stu Dio's folder.

Risk Factors can either be assigned by the system or by us, the CPA.

As best practice, we are going to add the Risk Factors listed on Stu's VOC document.

Click the Modify button.

Add Risk Factors 2

Go ahead and click the dropdown.

Add Risk Factors 3

As we'll learn in the Risk Factors module, system assigned risk factors such as 201 are not typically available to be assigned by a CPA.

However, since we don't usually enter the information after a VOC that is necessary to prompt the system to assign a risk factor, such as bloodwork or measurements, in WINNIE all risk factors are available to assign for participants VOC certified.

Select Risk Factor 201 – Low Hematocrit/Low Hemoglobin.

Add Risk Factors 4

Click the dropdown again.

Add Risk Factors 5

Notice that 201 is no longer an option we can select.

Go ahead and click below the scrollbar until you can select Risk Factor 425H.

Add Risk Factors 6

<no audio> Click below the scroll bar until you can select Risk Factor 425H – Inadequate Vitamin/Mineral Supplements.

<no audio> Click below the scrollbar.

Add Risk Factors 7

<no audio> Click below the scroll bar until you can select Risk Factor 425H – Inadequate Vitamin/Mineral Supplements.

Add Risk Factors 8

And click Save.

<no audio> Click the Save button.

Add Risk Factors 9

<waiting> <screen description – no audio> Spin icon displays.

The C under Assignment Method stands for CPA.

Next, let's also take a look at the Risk Factor page for Rae.

Go ahead. Click anywhere for a hint.

<no audio> Open the Risk Factor page for Rae. Click anywhere for a hint.
<audio – hint> Click the Participant Menu or the participant's name in the top right of the header.

Add Risk Factors 10

<no audio> Open the Risk Factor page for Rae. Click anywhere for a hint.

<audio – hint> Select Dio, Rae from the Other Household Members list.

Add Risk Factors 11

Rae has 502 assigned as expected.

Lastly, let's look at Roe's Risk Factor page.

<no audio> Open the Risk Factor page for Roe.

Add Risk Factors 12

<no audio> Open the Risk Factor page for Roe.

Add Risk Factors 13

Again, as expected, 502.

Before adding Risk Factors for mom and baby, we should link their records in Health Information and let the system do some of the assigning for us.

Select Health Information from the sidebar.

Two-Way Link 1

<waiting> <screen description – no audio> Spin icon displays.

Notice that mom's Actual Delivery Date displays.

Information entered into the VOC modal will display in the Participant Folder.

We want to create a two-way link between Roe and Rae's records, which is why we are in mom's folder and not the infant's folder.

Only by linking within mom's folder can we create a two-way link and we do **that** by completing the Infants Born from This Pregnancy information.

Click the button.

<no audio> Click the Infants Born from This Pregnancy button.

Two-Way Link 2

A view-only card displays with a skeleton record created for Roe's baby with the VOC information.

Since she is breastfeeding, Ever Breastfed is Yes, Breastfeeding Now is toggled on, and the Amount Breastfeeding is Mostly as we indicated in the VOC.

Since the baby's record has already been created, we do not ADD, we EDIT.

Click the Edit button.

Two-Way Link 3

The Infant Information modal opens with the same fields except they are now enabled, and we can update them if necessary.

We are going to complete this information pretty quickly since a detailed review is provided in the Health Information training modules.

Click the Infant Status dropdown.

Two-Way Link 4

Select Live at Postpartum Visit.

Two-Way Link 5

To create that two-way link, we toggle on Infant Enrolled in WIC.

Go ahead and do that.

<no audio> Toggle on Infant Enrolled in WIC.

Two-Way Link 6

This enables the Link to Infant button.

Go ahead and click it.

<no audio> Click the Link to Infant button.

Two-Way Link 7

The Linked Participant modal opens with a row for each infant in the household.

Even though there is only one row, we have to select the row before clicking OK.

Do that.

<no audio> Select the row then click the OK button.

Two-Way Link 8

<no audio> Select the row then click the OK button.

Two-Way Link 9

The infant's State WIC ID and Name now display.

Since the system knows the baby's gender from the Prescreen, it can populate that field, as well as today's date in the Breastfeeding Verified Date field.

Although, as we'll see in a minute, there aren't any validations for Health Information fields after a VOC, the required fields must be completed in this modal.

Roe told us that Rae's birth weight was 6 pounds 9 ounces. Go ahead and add that.

Click into the Pounds field, type 6, click or Tab into the Ounces field, and type 9.

WIC PARTICIPANT: "Rae weighed 6 pounds and 9 ounces when she was born."

Two-Way Link 10

<no audio> Add Rae's birth weight. Click into the Pounds field, type 6, click or Tab into the Ounces field, type 9.

Two-Way Link 11

Breastfeeding Start Date is our next required field.

If we click its calendar control icon…

Two-Way Link 12

WINNIE automatically enters Rae's birth date since most infants start on the date they're born.

At this point, if we haven't already, we may want to have some more discussion about formula – what kind, how much, or how often to ensure we've selected the correct Breastfeeding Amount.

Since she is Mostly-Breastfeeding, we also need to complete the Supplemental Feeding Start Date field.

When we were completing the VOC, Mom told us that she started formula at the beginning of the year.

Click into the field and type 1/1/24.

<no audio> Click into the Supplemental Feeding Start Date field and type 1/1/24.

Two-Way Link 13

<no audio> Click into the Supplemental Feeding Start Date field and type 1/1/24.

Two-Way Link 14

We're done with this modal.

Go ahead and click Save.

<no audio> Click the Save button.

Two-Way Link 15

<waiting> <screen description – no audio> Spin icon displays.

The information we just saved now displays in the Infants Born from This Pregnancy card except for the Supplemental Feeding Start Date and Breastfeeding Start Date, which are used to calculate the infant's age when formula was introduced.

Click the X to close the card.

Health Information 1

As we mentioned earlier, the fields on the Health Information page are enabled but none are required after a VOC, meaning we can make changes to the page without having to complete all of the other fields that are usually required for a certification.

Many of the toggles on Health Information have a Risk Factor that is assigned when it's toggled on.

For instance, Roe was assigned Risk Factor 303 – History of Gestational Diabetes.

If we toggle on Gestational Diabetes, WINNIE will assign Risk Factor 303.

Let's do that. Go ahead and toggle it on.

<no audio> Toggle on Gestational Diabetes.

Health Information 2

Like all other pages in WINNIE, we have to save our change.

Click below the scrollbar and click the Save button.

Health Information 3

<no audio> Click the Save button.

Health Information 4

<waiting> <screen description – no audio> Spin icon displays.

Before we go back to Risk Factors, let's take a look at baby Rae's Health Information.

Go ahead.

<audio – hint> Click the Participant Menu.

Health Information 5

<no audio> Open Rae's Health Information page.

<audio – hint> Select Dio, Rae from the Other Household Members list.

Health Information 6

<waiting> <screen description – no audio> Spin icon displays.

When we created the two-way link in mom's folder, mom's information was inserted into her infant's Health Information page.

Like in mom's Health Information, fields appropriate for a currently breastfeeding infant are enabled and there are no requirement validations except for the Feeding Information card.

When saving this page, if a change has been made to any of these fields, the system will ensure all required Feeding Information fields have been completed.

If any haven't been, the system will require we complete them before saving the changes.

OK. Now let's go back to Risk Factors.

Collapse Clinic Actions and select Risk Factors from the sidebar.

<no audio> Click Clinic Actions to collapse the menu.

Add Risk Factors 14

<no audio> Select Risk Factors.

Add Risk Factors 15

When we linked mom and baby, the system assessed for, and assigned, risk factors based on WIC Category, age, and breastfeeding amount.

According to Rae's VOC document, we have one more risk factor we can assign, 411K.

Click the Modify button.

Add Risk Factors 16

This time, we're going to type the risk factor ID into the dropdown field.

Type 4.

Add Risk Factors 17

Notice the dropdown options each number is typed.

Type the rest of the ID: 11k.

<no audio> Typed 11k.

Add Risk Factors 18

<no audio> Type 11k.

Add Risk Factors 19

Press the Enter key on the keyboard or click the risk factor in the dropdown to select it.

Add Risk Factors 20

And save.

<no audio> Click the Save button.

Add Risk Factors 21

<waiting> <screen description – no audio> Spin icon displays.

Now let's checkout Roe's risk factors.

<no audio> Open Roe's Risk Factors page.

<audio – hint> Click the Participant Menu.

Add Risk Factors 22

<no audio> Open Roe's Risk Factors page.

Add Risk Factors 23

As expected, by toggling on History of Gestational Diabetes in Health Information…

Add Risk Factors 24

…the system assigned its corresponding Risk Factor 303.

As well as 601 once she and her baby were two-way linked.

Add Risk Factors 25

Per her VOC, she also had 371 and 401 assigned.

We're going to add those behind the scenes and move on.

<screen description – no audio> Slide transitions to Risk Factors page with 371 and 401 added.

Add Risk Factors 26

We also have to add food prescriptions for everyone.

Go ahead and open the Food Prescription page.

<no audio> Select Food Prescription from the sidebar.

Add Food Rx 1

<waiting> <screen description – no audio> Working…please wait and spin icon display.

We're going to add Roe's food package behind the scenes.

Go ahead and open Stu's Food Prescription page.

Add Food Rx 2

<no audio> Open Stu's Food Prescription page.

Add Food Rx 3

We are going to quickly walk through adding default food packages for Stu with very little explanation since this isn't our focus.

However, Stu's age category, which we'll discuss in detail in the Food Prescription training modules, is going to change from 1 to 2 to 2 to 3 before his certification ends.

So, along with creating one for today, best practice is to create a food package for each category change that will occur before the Cert End Date.

Click the Add Food Prescription button.

Add Food Rx 4

Click the Use Default button.

Add Food Rx 5

And click the Save button.

Add Food Rx 6

Next, we are going to add a food package that starts on his two-year birthdate, 3/7/24.

Click the Add Food Prescription button.

Add Food Rx 7

Using the calendar control, select March 7 for the Effective Date.

Add Food Rx 8

<no audio> Using the calendar control, select March 7 for the Effective Date.

Add Food Rx 9

Click the Use Default button then click Save.

Add Food Rx 10

<no audio> Click the Use Default button then click Save.

Add Food Rx 11

Stu is set with a food package for today and one that starts on his two-year birthday.

Like Roe, we're going to add Rae's food packages behind the scenes.

<screen description – no audio> Slide transitions to Rae's Food Prescription page with food packages already created.

Add Food Rx 12

For Rae, we have added a food package for today, which is the 1-3 month age category, a 4-5 month, 6-8 month, 9-11 month, and a child food package for one year.

We also need to provide a WIC Card, which we've already learned how to do.

What page do we open to do this? Click anywhere for a hint.

<no audio> What page do we open to assign a WIC Card? Click anywhere for a hint.

<audio – hint> Select Manage eWIC Account from the sidebar.

WIC Card 1

Two things to note.

First, the pink status banner simply indicates that we have not yet sent eWIC data for this new household.

Second, the Authorized Rep from Prescreen displays.

Roe is OK being the only Household Representative, so let's just set her as the Primary Cardholder.

Double-click the Authorized Rep row, click into Date of Birth field, type 5/27/91, click Relationship dropdown, select Mother, click Update button, click the Auth Rep row to select it, and click Set Primary.

WIC Card 2

<no audio> Double-click the Authorized Rep row, click into Date of Birth field, type 5/27/91, click Relationship dropdown, select Mother, click Update button, click the Auth Rep row to select it, and click Set Primary.

WIC Card 3

Now let's assign card #6107279000000520.

Go ahead. Click anywhere for a hint.

<no audio> Assign card 6107279000000520 by typing the number (there are 6 zeros between the 9 and 5). Click anywhere for a hint.

<audio – hint> Click the Authorized Rep row to select it.

WIC Card 4

<no audio> Assign card 6107279000000520 by typing the number (there are 6 zeros between the 9 and 5). Click anywhere for a hint.

<audio – hint> Click the Assign Card button.

WIC Card 5

<no audio> Assign card 6107279000000520 by typing the number (there are 6 zeros between the 9 and 5). Click anywhere for a hint.

<audio – hint> Type the card number that displays on the screen. Make sure there are 6 zeros between the 9 and 5.

WIC Card 6

<no audio> Assign card 6107279000000520 by typing the number (there are 6 zeros between the 9 and 5). Click anywhere for a hint.

<audio – hint> Click the Save button.

WIC Card 7

OK. Our SWIPe is open, and we are ready to Send our eWIC Data.

Click the button and capture the signature.

<no audio> Click the Send eWIC Data button and capture the signature.

WIC Card 8

<waiting> <screen description – no audio> Working…please wait and spin icon display.

<no audio> Click the Send eWIC Data button and capture the signature.

<screen description – no audio> Capture Signature for Card modal displays with focus on Capture Electronic Signature button followed by Roe Dio's signature and Focus on Save Signature button.

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

Issue Benefits 1

Last step is to issue benefits.

Select that from the sidebar.

<no audio> Select Issue Benefits.

Issue Benefits 2

<waiting> <screen description – no audio> Working…please wait and spin icon display.

Again, our focus in this module isn't on how to issue benefits but that since the VOC is a certification, we should always issue benefits as part of its process.

Click below the scroll bar, and click the Issue Benefits button.

<no audio> Click below the scroll bar.

Issue Benefits 3

<no audio> Click the Issue Benefits button.

Issue Benefits 4

<waiting> <screen description – no audio> Working…please wait and spin icon display.

We're just going to note that there is more to issuing benefits than just clicking buttons…but that's all we're doing here.

Click the Send eWIC Data button.

Issue Benefits 5

<waiting> <screen description – no audio> Working…please wait and spin icon display.

Benefits successfully issued.

Click the Close button.

Completing VOCs

<waiting> <screen description – no audio> Working…please wait and spin icon display.

The tasks we've completed in the folder are best practice.

If we have information from the VOC document that can help with continuation of care for a participant transferring from another state, we should try to complete as much as possible in the Participant Folder.

This concludes our overview of VOC certifications for participants new to the MN WIC Program.

In the next modules we will look at VOCs for existing MN WIC participants.

Click the button to continue.

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.