# 300.12

# Data System Training

## Overview

**Introduction**

Local agency staff must be provided complete training in the data system before they are granted security rights to the production system. This includes an opportunity to practice in the training environment before they are allowed rights to the production system. Additional on-the-job training is also expected with someone of equal security rights.

**Purpose**

The purpose of using the training environment is to provide all WIC staff an opportunity for practice and to develop their familiarity and confidence prior to working in the production system independently. This will help avoid unreliable or lost data in the data system and disruptions to the system for other users.

Role-playing using the training environment will build new employee confidence prior to working with participants. Supervisors can also use observation and/or results of the training environment case studies to assess employee competence.

**Expectations**

**Using their assigned security token, local agency staff must complete the training environment homework specified for their position prior to being given access to the production system.** Record the Family IDs used in the scenarios on the Data System Training Checklist both to help find families for use in subsequent scenarios and for coordinator and state staff to verify completion of work.

**Monitoring**

The local agency coordinator must verify staff competency using the IWIN training checklist. Once this is completed, the coordinator must fax the completed checklist to the state WIC office and submit a request to the WIC HelpDesk for access to the production system for the new employee.

**Assurance**

Any work completed in the training environment will **not** impact production system.

# Training Environment Homework

**Training scenarios**

The training environment homework instructions and scenarios can be obtained on the WIC Web Portal. The instructions can also be found starting on page 6 of this policy.

Staff must also have a copy of the most recent *Quick Guide to WIC Appointment Types and Tabs to Complete* and *Quick Guide to WIC Tasks and Tabs to Complete.*

**Steps and outcomes**

All local WIC agency staff must complete the following steps prior to gaining access to the production system. The following steps must be completed quickly so that new WIC staff can work within the IWIN production environment.

| Step | Data System Training Activity | Outcome |
|---|---|---|
| 1 | For each new WIC employee, WIC coordinators must submit a New User Request Form and an IWIN Token User Information Form by mail or fax to the WIC HelpDesk. These forms must be received by the WIC HelpDesk by 2:00 pm Thursday. If forms are received by this deadline, tokens will be processed the following Monday night and will be activated by noon the following Tuesday. The WIC HelpDesk will contact the WIC Coordinator when the token is activated and ready for use.<br><br>Note: See Policy 330.10 for staff working less than .2 FTE for WIC and requesting a security token. **Staff must not share security tokens.** | A token will be issued to the WIC staff member and access will be granted to the training environment. |
| 2 | The new WIC employee must change their token soft pin before attempting to log into the training environment. Refer to the instructions enclosed with the token receipt form to complete this process. | A unique soft pin is set to allow only that WIC staff member access to the system with their token. |

*Continued on next page*

# Training Environment Homework, Continued

**Steps and outcomes** (continued)

<table>
<tr><th>Step</th><th>Data System Training Activity</th><th>Outcome</th></tr>
<tr><td>3</td><td>Lead WIC staff will provide onsite data system orientation to new staff by:<ul><li>Providing an overview of IWIN.</li><li>Assuring the employee has changed the soft pin and is able to log into IWIN.</li><li>Assigning a day or days to use the data system scenarios.</li><li>Making sure that CPA assistance is available for support staff completing scenarios if needed. If CPA assistance is unavailable, support staff may contact the State WIC office.</li></ul><u>Note:</u> The WIC Coordinator is responsible for assuring that a staff member is assigned to provide guidance to the trainee.</td><td>The WIC staff will have adequate knowledge of the WIC data system to begin the online training scenarios.</td></tr>
<tr><td>4</td><td>WIC staff will complete the homework scenarios on the train environment by the expected date of completion.<table><tr><th>If status is …</th><th>Then complete it within …</th></tr><tr><td>Full-time</td><td>2 weeks of receiving token.</td></tr><tr><td>Part-time</td><td>2 months of receiving token.</td></tr></table></td><td>WIC staff will be proficient in using the WIC data system to deliver quality services.</td></tr>
<tr><td>5</td><td>WIC coordinators will confirm completion of the homework scenarios within the expected timeframe. WIC coordinators will fax the data system training checklist to the state WIC office and email the WIC HelpDesk requesting security access to the data system production environment.</td><td>The WIC HelpDesk will review the request, verify completion of homework scenarios and grant access to the production system within two days of receiving the completed data system training checklist and request from the WIC coordinator.</td></tr>
</table>

# Completing the Homework

**Equipment**

Each agency should designate a computer with the current training environment available for use in employee training and practice. The training environment is only available through a connected log-in.

**Logging on to training environment**

Follow these steps to log in for practice.

| Step | Action |
|---|---|
| 1 | Click the WIC IWIN_TRAIN icon. |
| 2 | Select a clinic within your agency.<br><br>Note: Choose a clinic that is connected. |
| 3 | Log in using your user name, password and token with 4 digit soft pin.<br><br>User Name: This is the token user name that was assigned by the state WIC office to each staff person.<br><br>Example: bsmith<br><br>Password: This is the unique individual password that was assigned by the WIC Helpdesk.<br><br>Token: Token number + 4-digit soft pin number<br><br>**Note: Staff must use their assigned security token.** |

**Scenarios**

The state WIC office will maintain the training environment instructions and scenarios on the WIC Web Portal. The instructions can also be found starting on page 6 of this policy. To avoid multiple records, use **your** last name and agency number for all of the new participants you create within the training environment. (Scenario first name + your last name + agency number).

Examples: Robert Smith31; Jasonna Smith43; Carol Smith53

*Continued on next page*

## Training Environment Homework, Continued

**Role play**

Support staff must work with a CPA in order to create realistic clinic situations that include printing of checks. All staff should practice interviewing one another to gain familiarity and comfort with how that process works in clinic.

Note: Security levels will be established for support staff and CPAs in the training environment. If your security level does not allow you to complete the tasks that you need for your job, please contact the WIC HelpDesk.

**Replaced data**

Data in the training environment will be periodically replaced with converted data so extensive work will not be saved.

# Scheduler Only TRAIN Environment Homework Checklist

**Agency #:** _____ **Staff Person:** _____ **IWIN Security Designation:** _____

**Complete the following scenarios using your assigned security token.**
When the scenarios are completed, the WIC Coordinator must fax this form to 515/281-4913 and email the WIC HelpDesk to request access to the production system.

| **Required for all staff** | | | |
|---|---|---|---|
| **Scenario** | **Activity** | **Family ID** | **Date completed** |
| 1 | Print a schedule (attach) | NA | |
| 2 | Making appointment for existing termed family | | |
| 3 | Creating new family / appointment | | |
| 4 | Changing and checking appointments | | |
| | Cancel | | |
| | Move | | |
| | Reschedule | | |
| | When an appointment is rescheduled, the original appointment can no longer be seen under the Appointment tab in the participant's record. True / False | NA | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

For state WIC office only:
Date Received: _____ Help Desk Review: _____Consultant Review:

# Support Staff TRAIN Environment Homework Checklist

**Agency #:** _____ **Staff Person:** _____ **IWIN Security Designation:** _____

**Complete the following scenarios using your assigned security token.**
When the scenarios are completed, the WIC Coordinator must fax this form to 515/281-4913 and email the WIC HelpDesk to request access to the production system.

| Scenario | Activity | Family ID | Date completed |
|---|---|---|---|
| 1 | Print a schedule (attach) | NA | |
| 2 | Making appointment for existing termed family | | |
| 3 | Creating new family / appointment | | |
| 4 | Cancel, delete, move and reschedule appointments. | | |
| | Cancel | | |
| | Move | | |
| | Reschedule | | |
| | When an appointment is rescheduled, the original appointment can no longer be seen under the Appointment tab in the participant's record. True / False | NA | |
| 5 | Ineligible new family | | |
| 6 | Instate transfer | | |
| 7 | Incoming VOC | | |
| 8 | Foster child (links to 3) | | |
| | A foster child is a household of one. True / False | NA | |
| 9 | VOC and reinstate | | |
| 10 | Proof of income | | |
| 11 | Linking mom and infant | | |
| 12 | Print checks (attach) | | |
| 13 | Reissue checks (attach) | | |
| 14 | Terminate participant | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |
| | | | |

For state WIC office only:
Date Received: _____ Help Desk Review: _____Consultant Review:

# Non-CPA Professional TRAIN Environment Homework Checklist

**Agency #:** _____ **Staff Person:** _____ **IWIN Security Designation:** _____

**Complete the following scenarios using your assigned security token.**
When the scenarios are completed, the WIC Coordinator must fax this form to 515/281-4913 and email the WIC HelpDesk to request access to the production system.

| Scenario | Activity | Family ID | Date Completed |
|---|---|---|---|
| 1 | Creating an appointment for a new family<br>☐ Appointment Reminder attached | | |
| 2 | Print a Schedule<br>☐ Schedule attached | | |
| 3 | Finding and rescheduling an appointment | | |
| 4 | Initial certification of a child<br>• Question 4a Answer: _____<br>• Question 4b Answer: _____<br>• Question 4 c Answer: _____<br>☐ BMI-for-Age Growth Chart attached<br>☐ Rights and Responsibilities form attached | | |
| 5 | Create a new family through Clinic Services | | |
| 6 | Create an appointment for a terminated participant | | |
| 7 | Certification of a pregnant woman | | |
| 8 | Create a Verification of Certification (VOC) out and terminate a participant<br>☐ Verification of Certification form attached | | |
| 9 | Reinstate a participant and transfer a participant | | |
| 10 | Certification of a new breastfeeding mother and infant<br>• Question 10a Answer: _____ | | |
| 11 | Completing an Infant Health Update | | |
| 12 | Ineligible family<br>☐ Notice of Ineligibility form attached | | |
| 13 | Create a foster family | | |

| For state WIC office only: |
|---|

Date Received: _____ Help Desk Review: _____Consultant Review:

# CPA Professional TRAIN Environment Homework Checklist

**Agency #:** _____ **Staff Person:** _____ **IWIN Security Designation:** _____

Complete the following scenarios using your assigned security token.
**When the scenarios are completed, the WIC Coordinator must fax this form to 515/281-4913 and email the WIC HelpDesk to request access to the production system.**

| Scenario | Activity | Family ID | Date Completed |
|---|---|---|---|
| 1 | Making an appointment for an existing terminated family<br>☐ Appointment Reminder attached<br>☐ Daily Clinic Schedule attached<br>1) True/False: If you offer a mom an appointment for her baby within the 10 day requirement but she wants her appointment to be on a specific day in the future beyond the 10 day mark you need to check the waiver of time allowance box? | | |
| 2 | Initial Certification of a Breastfeeding Mom and Baby<br>☐ Mom's care plan attached<br>☐ Baby's Weight for Age growth chart attached<br>☐ Rights and Responsibilities attached<br>1.) True/False- A high risk participant does not require a care plan? | | |
| 3 | Certify a Pregnant Woman and Child<br>1.) What happens to the growth chart if you use the "Inaccurate Reason" box on the Anthro tab?<br>2.) True/False- Best practice is to also manually assign risks even if IWIN has auto assigned some for you too? | | |
| 4 | Certify Postpartum Woman and Baby<br>☐ Printed checks from this family attached<br>☐ VOC information printed attached<br>1.) True/False When you reissue checks it is EXTREMELY important that you double check the full check number (not just the ending digits) before selecting the FI's in IWIN that you wish to reissue for and when giving the FI's to the participant so they do NOT receive checks that have been voided in IWIN. | | |
| 5 | Infant Health Update | | |

| | | | |
|---|---|---|---|
| | 1.) True/False When making milestone food packages for a 4 month old (to get the increased formula) and for a 6 month old (to get the baby food) you should use the dates 5 months and 7 months after their DOB? | | |
| 6 | Fulfilling Proof of Income | | |
| 7 | Add a Foster Child to the Family | | |
| 8 | Incoming VOC Family<br>1.) True/False The Special Formula indicator must be checked and documentation must be seen to issue a formula to a child or woman participant. | | |
| 9 | In State Transfer<br>• Record the original clinic # of this family here _____. | | |
| 10 | Ineligible New Family<br>1.) If you determine a **new** participant is not income eligible should you print them a Notice of Termination or a Notice of Ineligibility? | | |
| 11 | Reinstate a Participant | | |
| 12 | Pre-Certify a Newborn Infant<br>1.) True/False Precerts can be done on any infant regardless of the formula they require? | | |
| 13 | Food Package Changes and Reissue FIs<br>1.) Yes/No Any time you issue less than the maximum allowable amount of food on a food package you must put a note in the Food Package comments link with an explanation of why? | | |
| 14 | Changing Breastfeeding Woman to Not Breastfeeding | | |
| 15 | Breastfeeding Mom,Infant, and Child Health Update | | |
| 16 | Pre-Certify a Pregnant Woman<br>1.) True/False To increase caseload, meet the demands of the 10/20 day rule, and provide better customer service your agency may do pre-certifications for Pregnant Women and Infants? | | |

| For state WIC office only: |
|---|

Date Received: _____ Help Desk Review: _____Consultant Review: