



Idaho WIC Training

WIC Computer System 101



WIC is an equal opportunity provider.

What Will You Learn?

Introduction to the WIC computer system, WIC Information System Program, or WISPr implemented in 2012. The goal of this guidebook is to introduce you to how to use the WIC computer system as well as basic functions and features. It is essential to providing WIC services, documentation, and benefits issuance. In the guidebooks WISPr is referred to as the WIC computer system.

Instruction Level

Prerequisite: Overview

Items Needed for This Course

- Access to the Idaho WIC website wic.dhw.idaho.gov
 - QRC (Quick Reference Cards)
 - Policy Manual - Definitions and acronyms
- Access to WISPr Production Environment wispr.dhw.idaho.gov
- Access to WISPR Training or UAT Environment wispruat.dhw.idaho.gov
- Access to the video [New WISPr Updates](#) (if available in your local agency)
- HWC user ID and password (Ask your trainer)

Recommended Time

- Approximate time it takes to complete the WIC Computer System course: 30-60 minutes
- Approximate time it takes to complete the activities and discussion: 30-60 minutes

Module 1: Basics

WISPr Environments

WISPr has multiple environments. Local agency staff have access to a live environment called production (PROD) and a training (TRNG) environment also called UAT. The URL links for both environments are given above in the “items needed for this course” section of this guidebook. Staff can use the training environment to practice and learn new functions without making changes to a real participant record. The production, or live environment, is where staff will work with participant records and perform activities such as certifying and issuing benefits.

Which environment are you in? Look at the left-hand side of the screen. You will notice a red or purple box in the margin of the training environment that says “TRNG” or “PROD”

Staff are assigned an HWC number as their username. Staff will need to set a password in each of the different environments, but staff usernames will be the same.

User Access and Roles

All users have different roles related to their job responsibilities or what they need to be able to do in WISPr. For example, a certifier has access to do things like enter income and complete nutrition assessments, while a breastfeeding peer counselor does not.

All users have access to their local agency participants. While staff can search all participants, they can only edit the record if that participant is in their local agency.

Help Desk

If you need to reset your WISPr password in the production or training environments, you can contact the help desk at the State Agency. Depending on how quickly you need your password reset you can either call 1-800-942-5811 or email wichd@dhw.idaho.gov.

QRCs

Quick Reference Cards have been created to show step by step instructions with screenshots on how to accomplish actions in WISPr. These are created for the most common functions staff need to learn. The QRCs are located on the WIC website where they are accessible at any time. The URL link for the WIC website is given above in the “items needed for this course” section of this guidebook. The QRCs are referred to in many documents, including the guidebooks. Ask your trainer to help you locate the QRCs.

The WISPr homepage has informational announcements for staff, contact information for the help desk, and links to materials such as the policy manual and QRCs.

Documentation

WISPr documentation is discussed throughout the training and policy manual. Some documentation procedures are handled by your local agency, such as staff notes and appointment information. Please remember that the information staff enter into WISPr can be requested by the participant or through a subpoena (required request in writing for a participant record by legal authority). It is important to document facts and key information in a brief manner and not to include opinion related information. Keep this in mind as you review documentation in care plans, staff notes, and alerts. Ask your trainer how your local agency documents in the staff notes and alerts.

Module 2: Functions and Features

The other guidebooks will refer to the QRCs throughout your training. The checklist for your position will also include all the QRCs you are required to complete. In this module, you will be introduced to basic functions and features. The video New WISPr Updates on the WIC website (linked above in the Items Need for This Course section) may be watched before or after reviewing this guidebook.

Features

In WISPr every family and participant are assigned a unique identification number. A family ID number will have a capital "F" in the front of six numbers like this: F111111. A participant ID number is made up of seven numerical digits.

Once you are logged into WISPr, there will be a search box in the upper right-hand corner of the screen. If you know the family or participant ID, you can enter it in the box to go directly to their account. If you have an eWIC card or card number, you can hand-key the number or swipe the card using your card reader to pull up the family account associated with the card. To search by name, date of birth, or other criteria, click on Participant/Family Search.

If you search for a family ID number, you will come to the Family Page. This screen shows the family's information such as phone number and address, functions including entering income or adding a new participant, staff notes and alerts related to the family, and a list of participants in the family.

Family Information: F265612 **Clinic: 301**

RA Name: Daisy Duck DOB: 1/1/2000 Phone: Address: 1234 Street, Boise, ID 83702 Authorized Signer:

Income Determination: 1/9/2020 Migrant: N Foster Family: N Homeless: N Referrals: FS, AF, MA, SA

Participants Include past participants

Status	PID	Cat	First	Last	DOB	End Cert
ACT	2168665	B	Daisy	Duck	1/1/2000	11/30/2020
APP	2168756	I	Test	Baby	1/25/2020	

Alerts Staff Notes

Staff Notes: All

Date	Author	Type	Note
1/10/2020	Ambrelle P...	CERT	Daisy Duck Certified through 11...
1/10/2020	Ambrelle P...	CERT	Louie Duck Certified through 1/...
1/9/2020	Ambrelle P...	CERT	Louie Duck Certified through 11...
1/9/2020	Ambrelle P...	GEN	Family income modified. House...

CREATE NEW NOTE View All Notes

Family Page

From the family page you can choose the participant you want to work with and open their account. This will take you to the Participant Page. The participant page houses all information that is specific to that individual.

Once you are in a participant's account you will notice a few different fields with navigation options. The purple bar across the top of the screen is the Menu Bar. The menu bar will have different options depending on your permissions. At the very least it should display your name, the name of the clinic where you are logged in, an option for User Profile and a Logout link in the menu bar.

Below the menu there will be buttons called Home, Participant/Family Search, Help, and maybe some others (again, these options depend on permissions). This section is called the top navigation bar or Top Nav.

The last navigation pane is on the left side of the screen and you will hear it referred to as the Left Nav. The left nav is how you can move throughout an individual's account.

Welcome, Ambrelle P. | Logout | User Admin | Vendor Maintenance | Food Table | Ewic | Reports | Tables
 Logged in at: State WIC Office | User Profile | Currently printing to: HC915401 (Lapwat) | Change Check Printer | Test Print

HOME | **PARTICIPANT / FAMILY SEARCH** | **CLASS / CLINIC PRINT CHECKS** | **AGENCY / CLINIC ADMINISTRATION** | **HELP**

Search: Card/Participant/Famil go

Feb 20, 2020 11:12 AM MST

Daisy Duck
 F265612 / 2168665
 Other Participants In This Family ▾

- >> Participant Summary
- >> Nutrition Assessment
- >> Certification
- >> eWIC Benefits
- >> Assign Food Package
- >> Voiced Checks
- >> Nutrition Education
 - > WICSmart
- >> Participant Care Plan
 - > Breastfeeding Education
 - > Peer Counseling
 - > Equipment

Client: 2168665 | **Family:** F265612 | **Clinic:** 301 | **Cross Ref:**

Status: ACT	Status Date: 1/10/2020	Category: B	End Cert Date: 11/30/2020	Priority: 1
DOB: 1/1/2000	Age: 20 y 1 m		Ed Level: 12	

Buttons: Edit Participant, Transfer Participant, Cert History, Outgoing VOC, Appointments, Participant Timeline

Personal Information

SSN: NA	DOB: 1/1/2000	Sex: F	VOC: N
Language: English	Interpreter: N	Hispanic/Latino: N	Race: W
			Status Reason:

Adjunctive Eligibility | Override

Date Verified: 1/9/2020	Medicaid: N	SNAP: N	TANF: N	Medicaid #:	Household AE?: N
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Participant Care Plan | Alerts | **Staff Notes** | Referrals

Staff Notes | All ▾

Date	Author	Type	Note
1/10/2020	Ambrelle P...	CERT	Daisy Duck Certified through 11/30/2020, Health Screen availability range 6/10/2020 - 8/29/2020

CREATE NEW NOTE | View All Notes

Participant Page

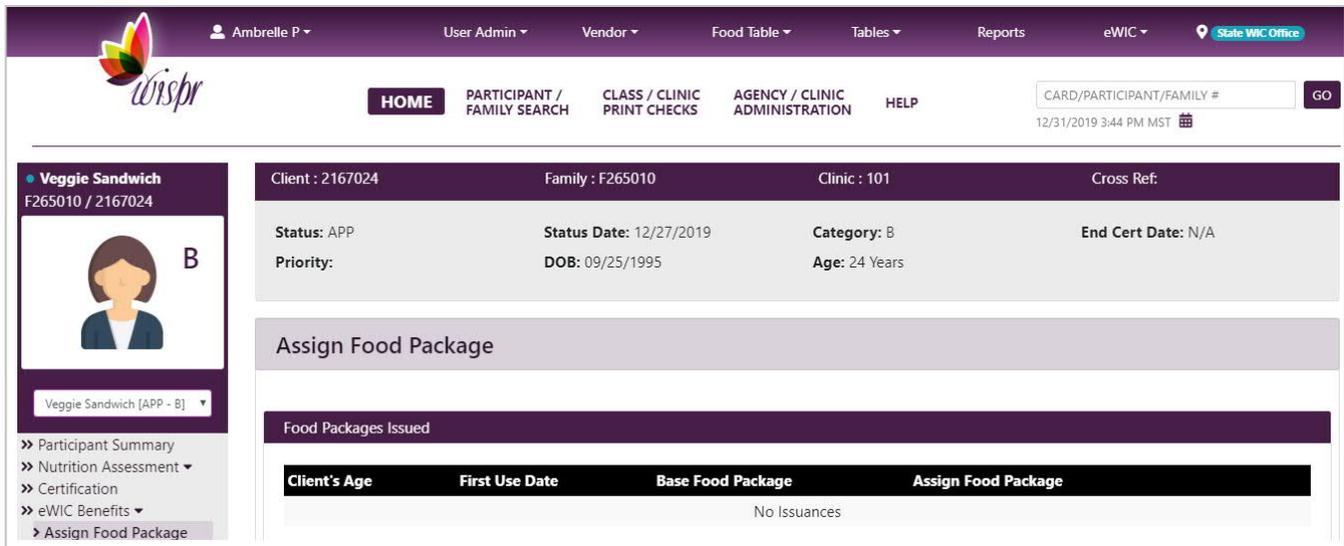
If you click on eWIC Benefits in the left nav you will notice that the look of the screen changes. Eventually all WISPr will share this look. In the upper left corner of the screen you will notice an icon with a letter to the right of it. The icon will either be a woman, a child, or an infant depending on the category of the participant and the letter next to it represents the category. If the icon is a child or infant it will be pink or blue depending on its gender.

Below the icon you will see a dropdown with the name of the participant, their status, and category. This dropdown will allow you to switch between participants in the family.

Above the icon, next to the participant’s name, you should see a colored dot. This dot represents the participant’s current status. The colors mean the following:

- Green = ACT (Active)
- Blue = APP (Applicant)
- Orange = TEMP (Temporary)
- Gray = CLO (Closed)

You can see an example of these features in the screenshot below.



eWIC side of participant account

The user’s name and the location they’re logged into will display at the top of the screen on all pages.

As mentioned previously, the left nav allows you to navigate around a participant’s account. See below for a brief description of what each option does. There may be fewer options on the left nav you see depending on your permissions or the participant’s category.

- Participant Summary – Displays the participant’s demographic information, eligibility information, staff notes, and buttons that allow actions related to that information like generating a VOC or transferring the participant.
- Nutrition Assessment – The nutrition assessment has two parts, the Health Assessment and the Assessment Interview. Both must be completed in order to certify a participant and the questions are dependent upon the participant’s category.
- Certification – Shows certification (cert) information and is where you would complete a cert, terminate a cert, or change a participant’s category.

- eWIC Benefits – Once you click on eWIC Benefits many new options will appear in the left nav. All of the newly available options are related to the issuance of electronic benefits.
 - Assign Food Package – Where benefits are assigned, and food packages can be tailored prior to issuance.
 - Card History – Where you can view information related to all cards that are or have been assigned to this family. This includes any cards that have belonged to second cardholders as well as the responsible adult.
 - Card Management – Cards are assigned, signed for, unlocked, and deactivated in this part of the application.
 - eWIC Activity – Transaction related information for the family can be viewed on the eWIC Activity screen. This includes issuance, redemptions, and voids. With eWIC, transaction information is recorded in real time so the information in this screen is current.
 - eWIC Balance – Shows the balance for the current month and any future months that have been issued for the family. The eWIC Balance can be printed.
 - Issuance – This is the screen where benefits that have been assigned and tailored are issued.
 - Issuance History – View eWIC benefits issuances for the family.
 - Reissue Formula – If formula needs to be changed after the family has redemptions on the account for the month it can be done in this screen.
 - Retailor Food – If a participant needs some food benefits changed after redemptions have already occurred for the month they can be changed in this screen. Only one retailor is allowed per family per month.
 - Special Authorization – Special authorizations are recorded and stored on this screen.
 - Void Future Benefits – Benefits are voided on this screen. Current month benefits can be voided in this screen if the family has no redemptions on the account for this month.
- Nutrition Education – Where information related to nutrition education contacts is stored. This section is made up of two pages, Education and WICSmart.
- Participant Care Plan – Where care plans can be viewed and printed.
- Breastfeeding Education – This section has two parts underneath it called Peer Counseling and Equipment. This is where information regarding peer counseling contacts and breastfeeding equipment rentals are stored and viewed.
- Check History – This is where any history related to checks lives. The Assigned Packages page contains history of all food packages that were assigned and checks that were used. The Voided Checks page contains history of checks that were voided for the participant. Checks were discontinued at the end of 2019.

Searching Participants

It is important to always search for a participant before creating a new account so that there are not duplicates in the WIC computer system. You should do this even if a participant tells you they have never been on WIC before. When you're searching, try a few different combinations of information. It doesn't take very long and helps keep WISPr information accurate. Here are a few things you can try:

- Last Name, First Name
- Last Name, First Name, DOB
- First Name, DOB
- First Name, Phone Number
- Ask if they've ever gone by a different name

Duplicate accounts can cause us to unknowingly omit records in the case of a subpoena or records request. If you realize that you created a duplicate account, please call the help desk for guidance as soon as you notice.

When you search for a participant, the phone number and address that display will always be the RA's information for the entire family. This means when a family has a second cardholder and you search their name, the phone number that displays in the search is the RA's phone number. If you want the second cardholder's phone number or address, go to either the card management screen or edit family information screen.



Complete Activity 1 in your Activities Workbook

Changing Responsible Adult (RA) and Second Cardholder

At certification or mid-certification, there could be a need to change the RA or second cardholder. In the WIC computer system, staff should never change the RA (if a name was legally changed, making the change is okay, as long as the RA is the same person). Changing the RA removes the history of the RA information. It is important that we keep correct records with all RAs that have participated in WIC. If you search and the new RA has never been on WIC, then create a new account and add or transfer participants into that family.

The second cardholder can be edited if they need to be added or removed from an account. A note automatically generates when a change is made to the second cardholder, so a history of records is maintained in the WIC computer system. If they are becoming the RA, a new family account would need to be created with them as the RA. Follow instructions in the Card management guidebooks on how to assign eWIC cards.

For example, if a mom is the RA on the account for Aubrey. Mom added grandpa as the second cardholder. Mid-certification, grandpa comes in with custody paperwork stating he now has Aubrey living with him full time. He has never been an RA on WIC before. Staff should search for grandpa's name to confirm he does not have an account. Then create a new family with grandpa as the RA and transfer Aubrey to his account.

Refer to the steps in the QRCs Add a Family and Add a new participant, Transferring participants.

NOTE: Full procedures for change in custody mid-cert can be found in IWPPM Chapter 4 and Card management for how to handle card procedures