



Texas-WIN

Admin Functions

MC AUTOMATION TRAINING

This slide features a large green graphic on the left side that forms the letter 'E'. The text 'Texas-WIN' is positioned in the upper right, and 'Admin Functions' is in the lower right, with a dark blue horizontal bar underneath it. A small logo for 'MC AUTOMATION TRAINING' is in the bottom left corner.

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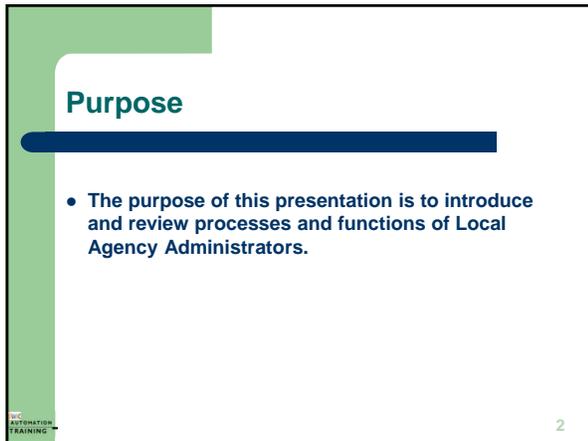
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Purpose

- The purpose of this presentation is to introduce and review processes and functions of Local Agency Administrators.

MC AUTOMATION TRAINING 2

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Topics

- View Clinic Data
- Dual Participation Resolution
- Receive Inventory
- Ship Inventory

MC AUTOMATION TRAINING 3

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## Topics

- Employee Profiles
- Security Access Groups
- Change Appointment Authority

HC INFORMATION TRAINING

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## View Clinic Data

HC INFORMATION TRAINING

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## View a Clinic Data



Local Agency Admin offices can only view

- Clinic Appointments
  - Search criteria: D.O.B. Date, time, and/or appointment type
- Clinic Certifications
- Client Data

HC INFORMATION TRAINING

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## View a Clinic Appointment

- Appointments can be viewed for individual clients using a client's name to search.
- Appointments can be viewed by searching Date, Time, and/or Appointment Type.



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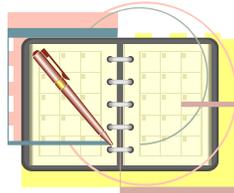
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## View Clinic Data

- Client Appointment Info



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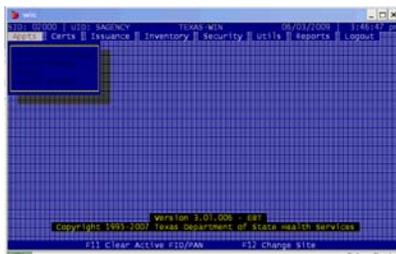
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## View Clinic Appointment



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### View Clinic Appointment



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### View Clinic Appointment By Client DOB



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### View Clinic Appointment By Client DOB



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### View Clinic Appointment By Client DOB



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### View Clinic Appointment By Client DOB



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### View Clinic Appointment By Client DOB



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## View Clinic Appointment

- View Clinic Appointments by:
  - Date
  - Time
  - Appointment Type

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## View Clinic Appointment



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## View Clinic Appointment By Date



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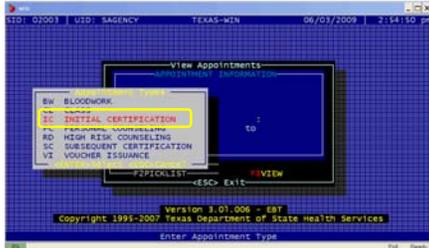
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### View Clinic Appointment By Appointment Type



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### View Clinic Appointment By Appointment Type



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### View Clinic Data

Client Certification  
Info



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## View a Clinic Certification

You can only view the certification information.

Remember-No changes are allowed at the admin level.



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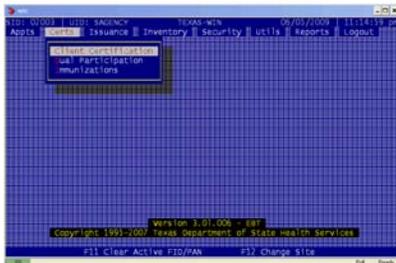
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## View Client Data



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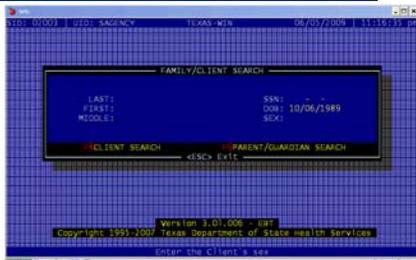
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## View Client Data



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### View Client Data



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### View Client Data



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### View Client Data



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**Summary-View Client Data**

- Appointments can be viewed for individual clients using Date of Birth to search.
- Appointments can be viewed by Date, Time, and/or Appointment Type.

INFORMATION TRAINING 31

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**Summary-View Client Data**

- No changes can be made to record at Admin level.
- Individual client records/certifications can be viewed.

INFORMATION TRAINING 32

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**Dual Participation**

INFORMATION TRAINING 33

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### Dual Participation

Dual participation is defined as a WIC client receiving more than one set of benefits during the same benefit period.



WIC INFORMATION TRAINING

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### Dual Participation

#### Local Agency Responsibility

- Identify suspected dual participants
- Investigate Dual Participation
- Resolve Dual Participation and take the appropriate action
- Notify the state upon completion of the investigation.

WIC INFORMATION TRAINING

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### Dual Participation

#### State notifies Local Agency of Dual Participation

- Electronic messages are sent to the administrative offices when the State Agency computer determines possible Dual Participation.

WIC INFORMATION TRAINING

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## Dual Participation

### Local Agency Responsibility

- When Texas-WIN loads on the admin system, an electronic check is made to determine if any dual participation records have been sent from the State Agency.

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## Dual Participation

If possible Dual Participation records exist, this screen appears:



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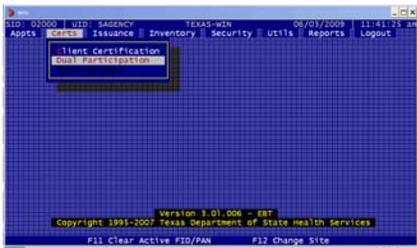
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## Dual Participation Resolution



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### Dual Participation Resolution

New Client	Family ID	LA	Old Client	Family ID	LA	Date Rec	N	M	X
02000201874	100001979491	020	04110040334	100001887868	100	05/15/2009			
05412037153	100001430883	020	04820023854	100001869451	048	04/15/2009			
02006013151	100001978831	020	10003046799	100001887868	100	05/05/2009			

F8: PICKLIST      F6: UNLOCK CODE      F8: TRANSFER TO STATE  
 ^ESC: EXIT  
 Copyright 1995-2007 Texas Department of State Health Services  
 Enter the New Client resolution code

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### Dual Participation Resolution

The first 3 columns represent new client data

New Client	Family ID	LA	Old Client	Family ID	LA	Date Rec	N	M	X
02000201874	100001979491	020	04110040334	100001887868	100	05/15/2009			
05412037153	100001430883	020	04820023854	100001869451	048	04/15/2009			
02006013151	100001978831	020	10003046799	100001887868	100	05/05/2009			

F8: PICKLIST      F6: UNLOCK CODE      F8: TRANSFER TO STATE  
 ^ESC: EXIT  
 Copyright 1995-2007 Texas Department of State Health Services  
 Enter the New Client resolution code

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### Dual Participation Resolution

The next 3 columns represent matching client data

New Client	Family ID	LA	Old Client	Family ID	LA	Date Rec	N	M	X
02000201874	100001979491	020	04110040334	100001887868	100	05/15/2009			
05412037153	100001430883	020	04820023854	100001869451	048	04/15/2009			
02006013151	100001978831	020	10003046799	100001887868	100	05/05/2009			

F8: PICKLIST      F6: UNLOCK CODE      F8: TRANSFER TO STATE  
 ^ESC: EXIT  
 Copyright 1995-2007 Texas Department of State Health Services  
 Enter the New Client resolution code

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## Dual Participation

### Local Agency Investigation

- Look at similarities such as: DOB, SSN, Name, and addresses of clients receiving benefits
- Contact site of Old Client data on the previous screen, if needed to thoroughly investigate

INFORMATION TRAINING 46

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## Dual Participation Resolution

Resolution Columns

- The column labeled N is for New Client.
- The column labeled M is for Matching Client.
- The column labeled X is the Transfer indicator to flag record for State.

N	M	X
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INFORMATION TRAINING 47

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## Dual Participation Resolution

- Resolution Codes

Resolution Code	Represents
N	No Dual Participation
D	Drop this client
K	Keep this client

INFORMATION TRAINING 48

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### Resolution Scenarios

N (New Client)	M (Old Client)	X (Transfer to State)	Dual Participation Situation
D	D	Y	Drops the new client and old client and transfers the information to state <i>Neither can participate!!!!</i>
D	K	Y	Drops new client and keeps old then transfer information to state <i>The new client will be unable to participate.</i>

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### Resolution Scenarios

N (New Client)	M (Old Client)	X (Transfer to State)	Dual Participation Situation
K	D	Y	Keeps the new client, drops the old client and transfers the information to state. <i>The old client will be unable to participate.</i>
N	N	Y	Marks both the new and the old as not dual participation. <i>Both will be able to continue participating.</i>

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### Preventing Dual Participation

- Find out if client is or has ever been a WIC participant—if so, request a transfer and wait for the electronic client record to arrive.
- If same client is added to FID a 2<sup>nd</sup> time, do not issue benefits to that client.

*Note: Transfers take approximately five business days.*

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### Summary-Dual Participation

- Local Agency Admin Office is responsible for resolving possible Dual Participation.
- Resolution Codes are:
  - N) No Dual Participation
  - D) Drop this client
  - K) Keep this client

Automation TRAINING 52

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### Summary-Dual Participation

- Investigate thoroughly.
- Make sure the client has never participated at another Local Agency.
- If codes are entered incorrectly, families will not be able to shop—and most likely won't know about it in advance.

Automation TRAINING 53

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### Summary-Dual Participation

- You have only one chance to resolve DP correctly—no other prompts or messages are received.
- Notify State Office by entering “Y” for yes, transfer information to state on the Dual Participation resolution screen.

Automation TRAINING 54

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## Inventory

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## Inventory

- Admin offices monitor clinic inventory.
- Admin offices receive inventory from State Office.
- Admin offices ship inventory to Clinics.

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## Receiving Inventory

Cynthia Prior

- Admin offices contact for inventory (512) 341-4546
- Ships inventory from state to LA



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## Receiving Inventory

Electronically and physically receive PAN's from the State.



INFORMATION TRAINING

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## Receiving Inventory



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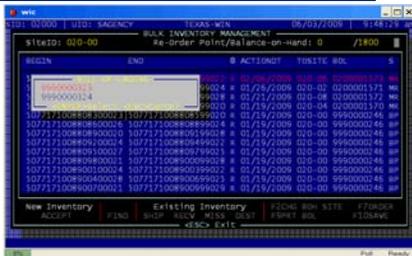
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## Receiving Inventory



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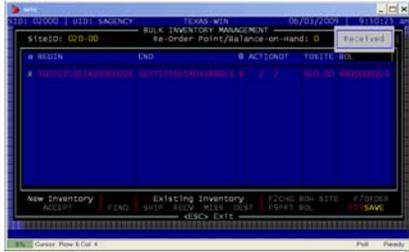
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## Receiving Inventory




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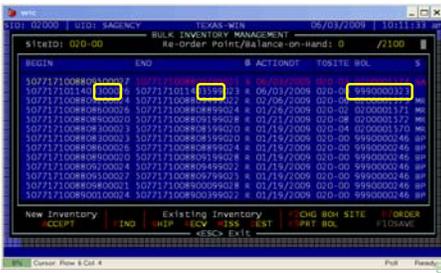
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## Receiving Inventory




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## Shipping Inventory



Electronically and physically ship PAN's to clinics.

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## Shipping Inventory

Clinics are able to electronically ship inventory between themselves. However, this is done **only** with Admin approval.



INFORMATION TRAINING

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## Shipping Inventory

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SITEID: 020-00          BULK INVENTORY MANAGEMENT          08/03/2008          1011133
Re-order Point/Balance-on-hand: 0          //2100

# BEGIN          END          # ACTIONDT          TDSITE          BOL
107712100890100027          107712100890199023          R          08/03/2008          020-00          9990000323
107712100890100026          107712100890199023          R          02/08/2009          020-06          0200001372
107712100890100026          107712100890199023          R          01/21/2009          020-08          0200001372
107712100890100026          107712100890199023          R          01/25/2009          020-04          0200001372
107712100890100026          107712100890199023          R          01/19/2009          020-00          9990000246
107712101140330026          1077121011403399023          R          06/03/2009          020-00          9990000323

New Inventory          Existing Inventory          CHG BOL SITE          ORDER
ACCEPT          FEND          SHIP          REC'D          MESS          DEST          PRNT          BOL          F10DAM
<ESC> Exit

```

INFORMATION TRAINING

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## Shipping Inventory

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SITEID: 020-00          BULK INVENTORY MANAGEMENT          08/03/2008          911342
Re-order Point/Balance-on-hand: 0          //2100

# BEGIN          END          # ACTIONDT          TDSITE          BOL
107712100890100021          107712100890099023          R          01/19/2009          020-00          9990000246
107712100890100024          107712100890099023          R          01/19/2009          020-00          9990000246
107712100890100028          107712100890099023          R          01/19/2009          020-00          9990000246
107712100890100021          107712100890099023          R          01/19/2009          020-00          9990000246
107712100890100023          1077121008901299023          R          01/19/2009          020-00          9990000246
107712101140330026          1077121011403399023          R          06/03/2009          020-00          9990000323

New Inventory          Existing Inventory          CHG BOL SITE          ORDER
ACCEPT          FEND          SHIP          REC'D          MESS          DEST          PRNT          BOL          F10DAM
<ESC> Exit

```

INFORMATION TRAINING

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### Summary-Inventory

- Admin is responsible for monitoring inventory in clinics.
- Inventory is electronically and physically received from State.
- Press "A" to Accept Inventory from state.

UC INFORMATION TRAINING

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### Summary-Inventory

- Inventory is electronically and physically shipped from Admin to clinics.
- Press "S" to Ship Inventory to a clinic.
- Use the spacebar to select/tag inventory to receive or ship.

UC INFORMATION TRAINING

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### Security

User Profiles  
Security Access Groups

UC INFORMATION TRAINING

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### Security-User Profiles

Each clinic is responsible for adding, modifying, and terminating employee computer user profiles.



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### Security-User Profiles

These changes only pertain to the site where employee is physically located.



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### Security-User Profiles



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### Security-User Profiles



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### Security-User Profiles



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### Security-User Profiles



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### Security-User Profiles

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### Security-Security Access Groups

Establish and maintain security groups to provide clinic and Local Agency employees proper access to Texas-WIN.

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### Security-Security Access Groups

Do not attempt any changes unless you are comfortable with this area!

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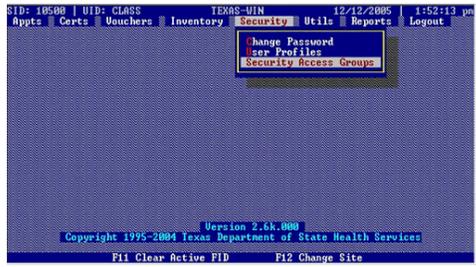
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### Security-Security Access Groups



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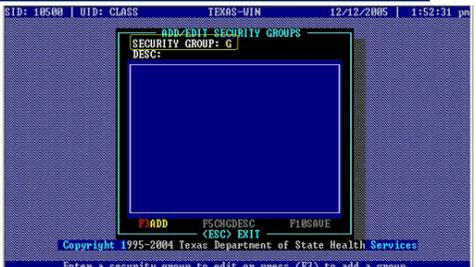
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### Security-Security Access Groups



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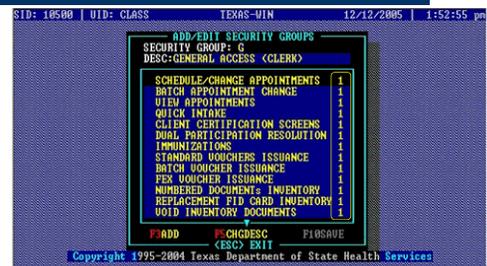
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### Security-Security Access Groups



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## Security-Security Access Groups

- Security Levels
  - L1 – Complete access
  - L2 – View only access
  - L3 – No access

SID: 10560 | UID: CLASS      TEXAS-VIN      12/12/2005      1:53:21 pm

INFO  
AUTOMATION  
TRAINING

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## Security-Security Access Groups

SID: 10560 | UID: CLASS      TEXAS-VIN      12/12/2005      1:53:21 pm

ADD/EDIT SECURITY GROUPS  
SECURITY GROUPS G  
DESC:GENERAL ACCESS (CLERK)

```

*SCHEDULE/CHANGE APPOINTMENTS 3
BATCH APPOINTMENT CHANGE 1
CLIENT CERTIFICATION SCREENS 1
DUAL PARTICIPATION RESOLUTION 1
IMMUNIZATIONS 1
STANDARD VOUCHERS ISSUANCE 1
BATCH VOUCHER ISSUANCE 1
TEX VOUCHER ISSUANCE 1
NUMBERED DOCUMENT INVENTORY 1
REPLACEMENT FID CARD INVENTORY 1
VOID INVENTORY DOCUMENTS 1
  
```

F3ADD    F10CHGDESC    F10SAVE  
(ESC) EXIT

Copyright 1995-2004 Texas Department of State Health Services  
Press SPACE BAR or RETURN to change security level

INFO  
AUTOMATION  
TRAINING

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## Security-Security Access Groups

- Directors have the final authority on specific levels settings and group identification.
- All projects were initially set up with a General Access Clerk, group "G". Directors may elect to only use this group, or create additional ones. New groups are assigned in alphabetical order.

INFO  
AUTOMATION  
TRAINING

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### Summary-Security

- Each clinic is responsible for adding, modifying, and terminating employee computer user profiles.
- New employee's record are added through Security-User Profiles.
- Security Groups determine what level access employees have to a TX-WIN function.

INFORMATION TRAINING 88

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### Summary-Security

- Security Groups A-F are reserved for State Office.
- Security Groups G-Z can be configured by Local Agency Directors.
- Local Agency Directors have the final authority on specific level settings and group identification.

INFORMATION TRAINING 89

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### Utils

#### Appt Authority Transfer

INFORMATION TRAINING 90

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### Utils-Appt Authority Transfer

If desired, the Local Agency can turn off the appointment system at the clinic.

All appointments would then be handled by the admin office.



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### Utils-Appt Authority Transfer

Most Local Agencies leave the Appt. authority up to the clinics.



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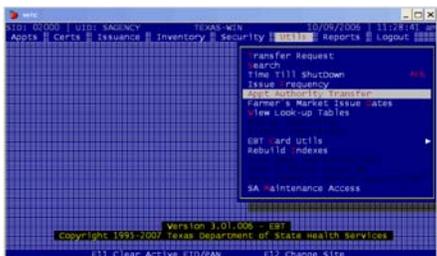
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### Utils-Appt Authority Transfer



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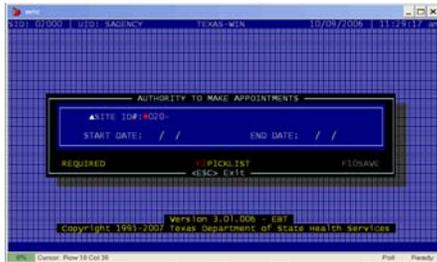
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## Utils-Appt Authority Transfer



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## Summary-Utils

- Local Agency Admin Office sets Appointment Transfer Authority.

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## Thank You

- Thank you for participating in the Admin Functions Presentation today.
- For technical questions please call the WIC Application Support Service Desk.  
1(800) 650-1258
- If you have any questions or comments about this class, please email us:

[WicApplTraining@dshs.state.tx.us](mailto:WicApplTraining@dshs.state.tx.us)

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