

Accessing WINNIE 3 – Online Training Module

JANUARY 2023

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is a continued look at accessing WINNIE, the browser-based app used by MN WIC.

<Transition Slide>

<screen description – no audio> Slide transitions from intro slide to WINNIE MFA page.

Complete Login

We have entered our username, password and MFA code, and toggled on Remember Me.

To complete our login, we click the Login button. Go ahead.

Page Transition

<screen description – no audio> Screen clears and spin icon displays.

Page Transition 1

<screen description – no audio> Screen displays: Please wait while your location information is retrieved.

Page Transition 2

<screen description – no audio> Location modal displays with Agency and Clinic.

Click the button to continue.

User Locations & Roles

<Transition Slide>

<screen description – no audio> Slide transitions from topic slide to WINNIE Location modal.

Locations & Roles

Our username is assigned access to specific locations, our agencies and clinics we work at.

Our locations are then assigned roles to specific features that allow us to perform functions in WINNIE.

This means that we can have different roles based on the clinic we are working at.

For instance, we may be able to create the clinic calendar at one clinic but not another.

Our locations and roles are determined by our WIC Coordinators/Supervisors.

WINNIE Roles

Our roles are named based on the functions they can perform (the numbers are needed internally for WINNIE):

WINNIE CPA (Role 21) is our certifier

WINNIE CPA WITH CALENDAR (Role 22) is our certifier that can also create appointment calendars

WINNIE AGENCY ADMIN (Role 20) allow staff to resolve duplicate participants and maintain medical providers/clinics, referrals, local use questions

WINNIE SCHEDULER (Role 25) are staff that do not certify but can perform all functions necessary for Separation of Duties requirements

WINNIE PEER (Role 24) is for breastfeeding peer staff

WINNIE OFFICE (Role 26) allows access to a clinic called State Office that has a database with 6 years of records; it is view only but they can print documents.

WINNIE VIEW ONLY (Role 23) is for staff that only audit records

For the majority of our training modules, our user will have WINNIE CPA WITH CALENDAR and WINNIE AGENCY ADMIN roles.

Location Modal & User Preferences

Location

The Location Modal, a window requiring input that must be addressed before we can continue, displays once we've successfully logged in.

It does not display if we only have access to one agency and one clinic.

If we have access to more than one agency, the Agency and Clinic fields display **Please Select** the first time we log into WINNIE and the agencies and clinics we have been given access to are available in its dropdowns.

<Transition Slide>

<screen description – no audio> Screen transitions from Location modal with Please Select for Agency and Clinic to Hennepin County Human Services selected for Agency and 089 – South selected for the clinic.

If we have access to only one agency and multiple clinics...

One Agency

...our Agency will default along with the first clinic listed in the Clinic dropdown.

Click the Agency dropdown.

Location Dropdowns

Now click the Clinic dropdown.

Clinic Dropdown

The purpose of the Location modal is to identify the agency and clinic we are working at today.

We are going to work at the Northpoint clinic.

Go ahead and select it.

<no audio> Select 091 – NORTHPOINT.

Remember Toggle

The Remember My Selection toggle is off by default.

The purpose of the Remember My Selection toggle is to identify the agency and clinic we most often work at so that they default.

<Transition Slide>

<screen description – no audio> Screen transitions from Location modal to User Preferences.

User Preferences 1

Remember My Selection is linked to our User Preferences...

User Preferences 2

...which define our default Agency and Clinic.

Our User Preferences are set to No Selection if we've never logged in or we've logged in but haven't toggled on Remember My Selection.

<Transition Slide>

<screen description – no audio> Screen transitions from User Preferences back to Location modal with Agency = Hennepin and Clinic = Northpoint.

Toggle On

If we toggle on Remember My Selection, the system will update our User Preferences and will default this agency and clinic when we login.

Since we most often work at the Northpoint clinic, we are going to toggle it on.

<no audio> Toggle on Remember My Selection.

Save Location

And click OK.

<no audio> Click the OK button.

Open Preferences

This page is the Module Launcher and we'll talk more about it in a minute.

For now, we'll continue with our User Preferences.

Clicking our username, opens the User Preferences page.

Click on trains01 in the welcome statement.

User Preferences 1

The system saves the Agency and Clinic that were selected when we toggled on Remember My Selection.

The only way to remove the default agency and clinic once it's saved is to change the dropdowns back to No Selection and Save the change.

<Transition Slide>

<screen description – no audio> Screen transitions back to User Preferences with Hennepin selected for the Default Agency and Northpoint selected as the default Clinic.

<Transition Slide>

<screen description – no audio> Screen transitions from User Preferences to the Location modal with Hennepin and Northpoint as the default Agency and Clinic and Remember My Selection toggled on.

Change Default

The next time we login the Remember My Selection continues to be toggled on and our previously selected Agency and/or Clinic defaults.

If we are working at a different agency and/or clinic and want the system to default display the new agency and/or clinic, we simply select the new site while the toggle is on.

Go ahead and select 206 – IOCP from the Clinic dropdown.

<no audio> Click the Clinic dropdown.

New Clinic

<no audio> Select 206 – IOCP.

Save New Clinic

And click OK.

<no audio> Click the OK button.

Check Preferences

Go ahead and verify our User Preferences updated with our new default clinic 206-IOCP

Click anywhere for a hint.

<audio – hint> Click on our username, trains01, in the welcome sentence.

Applications Toggle

To exit this screen, we click the Applications Toggle, which is the grid icon and name of the page on the blue banner. This will return us to the Module Launcher page.

Go ahead and click the Applications Toggle to exit.

<Transition Slide>

<screen description – no audio> Screen transitions from Module Launcher page back to the Locations modal.

Keep Default Clinic

One last thing.

If we are working at another agency and/or clinic just for one day and don't want our default agency/clinic to change, we toggle off Remember My Selection and the new agency/clinic is not saved to User Preferences.

Let's do that.

We are going to work at Clinic 090 – HSB just for today and don't want to change our default clinic. Verify User Preferences then return to the Module Launcher.

Go ahead. Click anywhere for a hint.

<audio – hint> Click the Clinic dropdown.

Keep Default Clinic 1

<audio – hint> Select 090 – HSB.

Keep Default Clinic 2

<audio – hint> Toggle off Remember My Selection.

Keep Default Clinic 3

<audio – hint> Click the OK button.

Keep Default Clinic 4

<audio – hint> Click on our username, trains01, in the welcome sentence.

Keep Default Clinic 5

<screen description – no audio> Red box encircles clinic, which continues to display previously selected default of 206 – IOCP.

<audio – hint> Click the Applications Toggle, or grid icon and User Preferences, on the blue bar to return to the Module Launcher.

<Transition Slide>

<screen description – no audio> Slide transitions from Module Launcher page to Locations modal.

Retains Default

The next time we login, Remember My Selection is automatically toggled on again and our previously selected defaults display.

<Transition Slide>

<screen description – no audio> Slide transitions from Locations modal to Moduler Launcher page.

Module Launcher

<screen description – no audio> Slide transitions from topic slide to Module Launcher page.

Module Launcher

The Module Launcher page displays the modules we will use to provide WIC services.

Clinic Services where we provide services to participants and Agency Administration where we manage local agency settings, community resources, and other local agency-specific-data.

Modules & Roles

The modules that display are based on our locations and assigned role(s).

In this instance, user trains01 has the WINNIE roles CPA WITH CALENDAR and AGENCY ADMIN.

Modules & Roles 1

We would only see the Clinic Services module if we had either the CPA or SCHEDULER role.

The Module Launcher is also the page we return to when logging out, which we'll talk about in a couple of minutes.

Modules & Roles 1A

Click the button to continue.

Bookmarking Login

Once we are on the Module Launcher page, we can bookmark WINNIE.

We should only bookmark WINNIE once we are on this page after having successfully logged in.

Bookmarking Login 1

To bookmark our WINNIE login page, we need to grab the icon to the left of the URL. We do that...

Bookmarking Login 1A

... by clicking and dragging it to our Favorites bar. (4 sec)

To edit its name, we right-click to open the menu and select Edit.

In the Name field, <pause> we should click and drag over the words Module Launcher since we are creating a bookmark for the WINNIE **login** page – then delete it.

Next we click and drag over the module and slash in the URL field and delete that.

Then we click Save.

We should note that these steps are the same regardless of browser.

<Transition Slide>

<screen description – no audio> Slide transitions from Module Launcher page to topic page.

Rules!

<Transition Slide>

<screen description – no audio> Slide transitions from topic page to Module Launcher page.

No Multiple Tabs

There are a few hard-and-fast rules for using WINNIE.

It's pretty common to open multiples tabs for the **same site** for our browser-based apps, but this is **not** allowed with WINNIE.

We should only ever have WINNIE open in **one browser tab at a time**.

Only One Browser

WINNIE should also **never** be opened in more than one **browser** at a time.

Rules

Opening WINNIE in more than one browser tab, or multiple browsers, can cause data syncing, transfer, and storage issues.

It is our responsibility to ensure the data we collect and enter into the system is not negatively impacted by inappropriate practices.

Also, since WINNIE is available on any computer, we may be tempted to use WINNIE on public or personal devices or use public Internet connections.

This puts our participants' personal and private data at risk and we should only use our work computers, and appropriate county networks or VPN, to access WINNIE.

Browser Sessions

Sessions

A browser session is started every time we log into WINNIE.

Our sessions are limited to 30 minutes unless "server calls" occur.

A server call is any activity that saves data or changes the page, such as participant searches, opening participant folders, selecting different pages such as opening Health Information, Blood or Income, and saving changes.

When a server call occurs, the system resets the clock for our session, allowing us to continue using WINNIE.

Not Server Call

Typing information into fields on a page in WINNIE is not a server call.

For example, while working to complete the Health Information page, we enter into a couple of involved discussions then notice the anthropometric station is available. While we go to get the measurements for our family of 4, we lock our computer but remain on the Health Information page since we have a couple more fields to complete. When we return, it's been more than 30 minutes since we opened the Health Information page. Since all we've done is enter data, and not saved, the session will time-out and the data will not be saved.

<Transition Slide>

<screen description – no audio> Slide transitions from topic page to Idle Notice page.

Idle Notice

This is the time-out message that displays: Idle Notice - You were idle for more than 30 minutes. Please login to continue.

Clicking OK will begin the process for automatically logging us out of WINNIE and returning us to the login page.

<Transition Slide>

<screen description – no audio> Slide transitions from Idle Notice page to topic page.

Browser Zoom

Zoom

Like any web page, we can modify the size of the contents of each page in WINNIE by changing the browser's zoom setting.

The layout of each page will be impacted by a change in zoom settings.

It has been found that a zoom setting of 75-85% on a 15.6-inch laptop (state-provided laptop size) may be ideal for viewing with reduced scrolling.

<Transition Slide>

<screen description – no audio> Slide transitions from topic page to 100%-zoomed page.

Zoom Preference

Let's take a quick look at the impact of changing zoom in WINNIE.

Zoom is found in the Settings menu in both Google Chrome and Microsoft Edge.

In this instance, we are using Google Chrome.

Go ahead and click the Settings icon.

Zoom 100%

Currently, zoom is set to 100%.

Go ahead and click the minus sign.

Zoom 90%

Notice how WINNIE changes and that we can see more information.

Click the minus sign again.

Zoom 80%

And one more time.

<no audio> Click the minus sign.

Zoom 75%

Depending on the size of our monitor, and our own preferences, we should adjust the zoom to best meet our needs.

This setting adjusts the view for all web pages and may need to be adjusted back to 100% when viewing other pages.

<Transition Slide>

<screen description – no audio> Screen transitions from 75% to 67% zoom.

Zoom 67%

NOTE: For the majority of the WINNIE training modules, the zoom is set to 67%

Click the button to continue.

Logging Out

<Transition Slide>

<screen description – no audio> Slide transitions from topic page to Module Launcher page.

Logout

Most of us use browsers every day and we close most webpages by simply closing the browser tab.

However, closing the browser tab does **not** log us out of WINNIE.

A good rule of thumb: whenever we log **into** a system, we should **always log out of** the system.

Logout 1

Applying that rule, since we log into WINNIE...

<screen description – no audio> Login page fades in and back out.

Logout 2

...we must always log out when we are done using WINNIE.

Logging out gives the system time to do any necessary clean-up and to close our session.

Logout 3

We'd be remiss if we didn't note that closing the entire browser will log us out of WINNIE. However, this is not an appropriate practice.

We should always return to the Module Launcher page and click the Logout link..

...go ahead and do that...

Logout 4

...giving it time to do its thing...

Logout 5

<screen description> Spin icon.

Logout 6

<screen description> Spin icon.

Logout 7

...and we should close our browser, or browser tab, once we've been returned to the WINNIE login page.

Test Your Knowledge

Q1 – True/False

We've already toggled on Remember My Selection to save our default agency and clinic on the Location modal. If we are working at a different clinic and don't want to save it as the new default, we toggle Remember My Selection off.

A1

The answer is True.

If we change our agency and/or clinic on the Location modal and Remember My Selection is toggled on, the system will update our User Preferences with the newly selected agency/clinic.

Toggling Remember My Selection off ensures the defaults selections are not changed.

Q2 – Multiple Choice (single answer)

When should we bookmark WINNIE? (select one answer)

- A) We shouldn't bookmark WINNIE - that is a security risk.
- B) The first time we open the WINNIE login page.
- C) On the Module Launcher page after successfully logging in.
- D) Only after toggling on Remember My Selection on the Location modal.
- E) None of the above.

A2

The answer is C.

We should bookmark WINNIE once we are on the Module Launcher page after having successfully logged in.

Q3 – Multiple Choice (multi-select answers)

Which rules apply when using WINNIE? (select all that apply)

- A) WINNIE should only be open in one browser tab at a time.

- B) WINNIE should only be open in one browser at a time.
- C) WINNIE should only be used on our work computers.
- D) WINNIE should only be used when using appropriate county networks or VPN.
- E) WINNIE should only be used when using public Internet connections.

Answer #3

The answers are A, B, C, and D.

WINNIE should only be opened in one browser tab (A) and in one browser (B) at a time. WINNIE should only be used on our work computers (C) and when using appropriate county networks or VPN (D).

Corrected Answer:

WINNIE should NEVER be used when using public Internet connections (E).

Q4 – Multiple Choice (select one answer)

Which is NOT true about server calls? (select one answer)

- A) Server calls are necessary to extend our user session
- B) Server calls include entering data on a page.
- C) Server calls are any activity that saves data.
- D) If a server call isn't made within 30 minutes an Idle Notice displays and we are automatically logged out.
- E) Switching from the Income page to the Height/Weight page is considered a server call.

A4

The answer is B.

A server call does NOT include entering information into fields on a page; the page must be saved or changed for a server call to be made.

End

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 Minnesota WIC Questions & Feedback form.

ACCESSING WINNIE 3

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