

# Local Use Questions 2 – WINNIE Online Agency Admin Training Module

OCTOBER 2024

## Introduction

### Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is a continued overview of Local Use Questions in Agency Administration in WINNIE, the MN WIC Information System.

### Date 1

All dates in this module are based on today's date being October 1, 2024.

### <Transition Slide>

<screen description – no audio> Slide transitions to Local Use Questions page.

## Overview

### Overview 1

We'll continue our review of Local Use Questions by looking at creating, editing, and deleting questions.

## Questions

### Add Questions 1

We can create new questions by clicking the Add Question button.

For instance, let's say our agency has just started using pop-up sites and we want to record when families visit a pop-up site.

Go ahead and click the Add Question button.

### Add Questions 2

The Local Use Questions modal opens.

Like answers, the Question Text field is limited to 50 characters, and allows letters, numbers, and special characters.

The question, Require an Answer dropdown, and Sort Order are all required.

Let's click into the Question Text field and type: Pop-up Site

## Add Questions 3

<no audio> Click into the Question Text field and type: Pop-up Site

## Add Questions 4

Click the Require an Answer dropdown.

## Require an Answer

### Require Answer 1

We have three options: Never, During a Certification Attempt, and Always.

During a Cert Attempt includes Mid-certification Assessments, or MCAs, but we will only be prompted to answer it when, or if, a change is made to Demographics.

Always means any time a change is made to Demographics.

Obviously, they are only required as long as an answer has not yet been selected.

### Require Answer 2

We only want it answered when a family is served at a pop-up site, so we'll select Never and train our staff to answer it when appropriate.

Go ahead and select Never.

<no audio> Select Never from the dropdown.

## Active Questions

### Active Questions 1

When Active, the question displays in Demographics.

Its default is off.

We want it to display so let's toggle it on.

<no audio> Toggle on Active.

## Sort Order

### Sort Questions 1

We saw in the previous module that we can click and drag to change the sort order.

We can also assign a sort order when adding, or editing, a question.

We want our new question to display first in our Local Use Question section in Demographics.

Click into the Sort Order field and type: 1

### Sort Questions 2

<no audio> Click into the Sort Order field and type: 1

## WIC Category

### WIC Category 1

By selecting a WIC Category, we can individualize questions for certain types of participants.

Click the WIC Category dropdown.

### WIC Category 2

The default is blank, so if we don't select anything, the question will display on the Demographics page for all participants.

### <Transition Slide>

If we've selected a category...

<screen description – no audio> Slide transitions to WIC Category of Child.

### WIC Category 2A

...and then want to change it to all, we can simply select the blank row from the dropdown.

### <Transition Slide>

<screen description – no audio> Slide transitions back to blank WIC Category.

## WIC Category 3

If a question is assigned to a specific WIC Category and the participant's category changes, for instance from infant to child, or pregnant to breastfeeding, the question and answer will clear and only those questions for their new category will display.

## WIC Category 3A

Even if we make the question exactly the same for each category, as we see with the C&TC questions, the question and answer will still clear when the category changes.

## WIC Category 3B

Two advantages to the blank or ALL option is that the answer will not clear when the WIC Category changes, and we only have to create one question.

## WIC Category 3C

We should note, though, that our only options are ALL and an individual category.

We can't multi-select WIC Categories.

## WIC Category 4

The WIC Category only displays on this modal.

We cannot see if a WIC Category has been assigned to a question when we first open the Local Use Questions page.

So, best practice in WINNIE, is to add the WIC Category to the question itself.

## WIC Category 4A

We aren't going to assign a category since we want the question answered once for the household on the date of the pop-up and it doesn't matter whose folder it is answered in.

Let's follow best practice and add (ALL) after the question text.

Click somewhere in the text box after the text and type a space, open parentheses, ALL in caps, and a close parentheses.

<no audio> Click inside the text box (after the text) and type: a space then (ALL)

## WIC Category 5

<no audio> Click inside the text box (after the text) and type: a space then (ALL)

## WIC Category 6

Go ahead and save our new question.

<no audio> Click the Save button.

## Wait!

When saving questions, the system takes a little bit of time because it is auto-adjusting the sort order of all existing questions.

Since it doesn't display a spin icon, we may be tempted to keep clicking the page.

Don't. Be patient and give it a minute to do its thing.

## Answers

### Add Answers 1

Next, we need to add some answers.

How do we add answers? Go ahead. Click anywhere for a hint.

<no audio> How do we add answers? Click anywhere for a hint.

<audio – hint> Click either the question text or the toggle accordion icon to expand the question.

### Add Answers 2

<no audio> How do we add answers? Click anywhere for a hint.

<audio – hint> Click the Add button.

### Add Answers 3

We are going to add three answers but make only two active.

Go ahead and add Hopkins, make it active, then Maple Grove, make it active, then Uptown. When done save the changes to the grid.

Click anywhere for a hint.

<no audio> Add Hopkins, make it active, add Maple Grove, make it active, then Uptown, Save the changes to the grid when done. Click anywhere for a hint.

<hint – no audio> Type Hopkins: H-o-p-k-i-n-s

### Add Answers 4

<no audio> Add Hopkins, make it active, add Maple Grove, make it active, then Uptown, Save the changes to the grid when done. Click anywhere for a hint.

<audio – hint> Double-click the Active column in that row.

### Add Answers 5

<no audio> Add Hopkins, make it active, add Maple Grove, make it active, then Uptown, Save the changes to the grid when done. Click anywhere for a hint.

<audio – hint> Toggle on Active.

### Add Answers 6

<no audio> Add Hopkins, make it active, add Maple Grove, make it active, then Uptown, Save the changes to the grid when done. Click anywhere for a hint.

<audio – hint> Click the Add button.

### Add Answers 7

<no audio> Add Hopkins, make it active, add Maple Grove, make it active, then Uptown, Save the changes to the grid when done. Click anywhere for a hint.

<audio – hint> Type Maple Grove. M-a-p-l-e space G-r-o-v-e

### Add Answers 8

<no audio> Add Hopkins, make it active, add Maple Grove, make it active, then Uptown, Save the changes to the grid when done. Click anywhere for a hint.

<audio – hint> Double-click the Active column in that row.

### Add Answers 9

<no audio> Add Hopkins, make it active, add Maple Grove, make it active, then Uptown, Save the changes to the grid when done. Click anywhere for a hint.

<audio – hint> Toggle on Active.

### Add Answers 10

<no audio> Add Hopkins, make it active, add Maple Grove, make it active, then Uptown, Save the changes to the grid when done. Click anywhere for a hint.

<audio – hint> Click the Add button.

## Add Answers 11

<no audio> Add Hopkins, make it active, add Maple Grove, make it active, then Uptown, Save the changes to the grid when done. Click anywhere for a hint.

<audio – hint> Type Uptown: U-p-t-o-w-n

## Add Answers 12

<no audio> Add Hopkins, make it active, add Maple Grove, make it active, then Uptown, Save the changes to the grid when done. Click anywhere for a hint.

<audio – hint> Click the Update button.

## <Waiting>

<screen description – no audio> Small spin icon then blue spin icon displays at the same time.

## Sort Answer 1

Notice the default sort order is based on the order we entered our answers.

OK. Let's expand the Notice of Privacy Practices question that we moved in the first module.

<no audio> Click to expand.

## Delete Questions

### Delete/Edit Questions 1

The Edit and Delete buttons at the top right of the card affect the question.

Similar to answers, we can only delete a question if no one has ever answered it.

We can edit the question at any time.

Go ahead and click the Edit button.

## Edit Questions

### Edit Questions 1

One caveat, when editing the Question Text we want to make sure we don't change the meaning of the question.

Let's add our WIC Category to this question.

Click into the field somewhere after the text and type a space, capital "B" inside parentheses.

<no audio> Click inside the text box (after the text) and type: a space then (B)

## Edit Questions 2

<no audio> Click inside the text box (after the text) and type: a space then (B)

## Edit Questions 3

We may want to add the WIC Category to all of our existing questions and to have that be part of our formatting for future questions.

## Sort Questions

### <Transition Slide>

In the last module...

<screen description – no audio> Slide transitions back to questions before any cards were expanded.

## Sort Questions 4

...we moved this question up using the click-and-drag feature.

## Sort Questions 5

But we should keep our questions grouped together so that, as best practice, we keep the questions in the same order on the Demographics page for all WIC categories.

### <Transition Slide>

<screen description – no audio> Slide transitions back to question modal.

## Sort Questions 6

So let's move this question back using the Sort Order field.

We have 1 new question, 3 inactive, and 5 each of the two CTC questions, so we need it to be at least number 15 in the list.

Double-click into the field, type 15, then save.

<no audio> Double-click into the Sort Order field, type 15, then click the Save button.

## Sort Questions 7 - 9

<no audio> Double-click into the Sort Order field, type 15, then click the Save button.



## Sort Questions 10

Wait...

<no audio> Be patient and give it a minute to do its thing.

## Review Questions in Folder

### Folder Changes 1

Let's return to Wynne Summe's Demographics page one more time.

<no audio> Return to Wynne Summe's Demographics page.

### Folder Changes 2

<no audio> Return to Wynne Summe's Demographics page.

### Folder Changes 3

Double-click Wynne's card.

<no audio> Double-click Wynne's participant card to open her folder.

### <Waiting>

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

### Folder Changes 4

We can see our new question, which will display first for all WIC categories.

Go ahead and click the dropdown...

<no audio> Click the Pop-up Site (ALL) dropdown.

### Folder Changes 5

...which has our two active answers.

And now our Notice of Privacy Practices question displays the B we added and it is last per our change in sort order.

### End Slide 1

This concludes our overview of Local Use Questions in Agency Administration.

Click the button to continue.

## Knowledge Test

### True/False Q#1

True or false?

A question will display for all women, infants, and children if we leave the WIC Category blank.

### Answer #1

The answer is True.

A blank WIC Category means “all” and the question will display for all WIC Categories.

### True/False Q#2

True or false?

The answer to a Local Use Question in an infant’s folder won’t clear when the WIC Category changes to child as long as we create the exact same question for both infants and children.

### Answer #2

The answer is False.

Even if the questions are exactly the same, they are still stored in the database as separate questions with different WIC categories associated with them. When the WIC Category changes, the question is replaced with the question associated with the new WIC Category, effectively clearing the previously selected answer.

## End

### End Slide 2

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](mailto:health.wic@state.mn.us), [www.health.state.mn.us](http://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.*