

Alerts – WINNIE Online Training Module

MARCH 2024

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is an overview of managing alerts in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being March 20, 2024.

Overview 1

Here's our scenario.

We, along with a Russian interpreter, are completing a nutrition contact with the Lesslie family, Ruth and her infant Grace.

We received a medical formula approval for Grace late yesterday to allow infant foods and extend her medical formula until September.

Click on Ruth's card to view her Show Details then double-click the card to open her participant folder.

Scenario 2

<no audio> Click on Ruth's card to view her Show Details then double-click the card to open her participant folder.

<Waiting>

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

Display Alerts 1

In WINNIE, there are three types of alerts: system, user, and priority.

All alerts are listed on the Display Alerts modal.

The contents of this modal are read-only.

System Alerts 1

System alerts are always household-level.

These are auto-generated and inform us of the following:

- Proof of Income, Residency or ID is required
- Mid-Certification Assessment due
- Bloodwork before the first birthday required
- No valid food prescription
- Special formula prescription expired
- Pregnant Woman Currently Breastfeeding

System Alerts 2

System alerts display for each member of the household to whom they apply and no longer display once the conditions are met.

We review system alerts in each training module where that type of alert might display, so we won't go into any more detail here.

Display User 1

User alerts allow us to communicate temporary, pertinent, and timely information to other WIC staff.

Display User 2

We can set the date the alert should start displaying and that's the Active Date.

The household member whose folder we were in when we created the alert is listed.

The Subject is required for Priority alerts, but otherwise optional, and we'll review the available topics in a minute.

We can preview the first 250 characters of each alert and the full text for the selected alert.

Lastly, while user alerts can be participant-level, MN WIC only creates household-level alerts so that all alerts display regardless of which member's folder we open.

Display User 3

The Alert text box includes the Staff ID of the person who wrote the alert and when, as well as the last person who may have modified it and when the edit occurred.

Delete Display User 1

We are able to delete user alerts from here and best practice is to delete alerts that are outdated or no longer relevant.

For instance, select the first 10/31 alert so that we can read the full text.

Delete Display User 2

We have an approval for Grace's medical formula dated 11/3, but an alert dated 10/31 telling us that we are waiting for approval and to issue benefits, both of which we know are completed tasks.

So, let's delete that first 10/31 alert.

To do that, we ensure our row is selected and click the Delete button.

Delete Display User 3

Then we select Yes.

Close Display Alerts 1

Go ahead and close the modal.

<no audio> Click the Close button.

Alerts PF 1

Manage Alerts is available on the sidebar as well as...click the Participant Menu...

Alerts PF 2

...in the Participant Menu when in the Folder...

Alerts CM 1

<screen description – no audio> Slide transitions from Ruth Lesslie's Demographics to Sallie Mander's Certification Mode.

...but it is only found in the Participant Menu while in Certification mode and not on the sidebar.

<Transition Slide>

<screen description – no audio> Slide transitions from Sallie Mander's Certification Mode to Ruth Lesslie's Demographics.

Open Alerts 1

Select Manage Alerts from the sidebar.

Waiting

We know there are alerts so we just have to wait a moment for them to display.

Manage Alerts Grid

The read-only grid provides the same information as the Display Alerts modal except for two things: we have to select the row to view the contents of the alert in the Alert Text field and the Priority column indicates if it's a Priority alert.

As with all grids in WINNIE, the arrows in the column headers allow us to change the sort order.

The little numbers tell us that the grid is first sorted by Date then by Name.

Add Alert 1

Since alerts are meant to be temporary, alerts can be edited and deleted at any time and these buttons are always enabled.

Let's start with adding an alert about the need for a Russian interpreter.

Click the Add button.

Add Alert 2

The Active Date is when we want the alert to start displaying.

It defaults to today and can be any future date.

The Alert Type defaults to Household.

The other option is Participant.

It defaults, and should remain, Household.

Priority Alert 1

When we toggle on Priority, we are indicating that this alert is important.

In general, we suggest that priority alerts be used to inform other staff of a required action before the next set of benefits are issued, such as verifying proofs, medical formula approvals, etc. which we'll see in a number of other training modules, or a long-term, ongoing need such as custody arrangements, interpreter needs, or specific privacy or safety needs such as Safe at Home.

Our agency may provide guidelines about when to use priority alerts, and as always, we should follow those.

ALERTS

Go ahead and toggle it on.

<no audio> Toggle on Priority.

Subject 1

The Subject is required for priority alerts and is optional for others.

Click the Subject dropdown.

Subject 2

The subject list is the same as the topics for notes, so we don't need to view them again.

Click below the scrollbar and select Interpreter/Language.

Subject 3

<no audio> Click below the scrollbar and select Interpreter/Language.

Alert Text 1

The free-form Alert Text field allows alphabetic, numeric, and special characters, and has a limit of 4000 characters.

Go ahead and click into the Alert Text field...

Alert Text 2

...and we'll quickly type the alert.

<screen description – no audio> Russian interpreter required for all communications with Ruth (mom). – ST

Add Alert 3

Click the Save button.

New Alert 1

The topic of a Priority alert displays in the header of each page of the participant folder, as well as the Show Details header, for every member of the household which we'll see in a minute.

The new alert indicates we were in Ruth's folder when we wrote the alert, shows our Subject, and the disabled Priority toggle is on.

When we create an alert, our staff ID is listed for both the creator and the modifier and today as the Created and Changed Date.

Edit Alert 1

We can Edit any alerts created by any staff on any date.

Continuing with our scenario, we received an updated Medical Formula Document (MFD) on 3/19 to approve solids and extend Grace's medical formula through September.

We could create a new alert, or we could edit the existing alert instead.

Let's do that.

Our formula approval alert was written on 11/3.

Select that row then click the Edit button.

<no audio> Select the 11/03 alert then click the Edit button.

Edit Alert 2

<no audio> Select the 11/03 alert then click the Edit button.

Edit Alert 3

We can keep the original Active Date when editing, even though it's in the past.

We can also change it to today or any future date, as well as change any of the other information.

We can have more than one priority alert and Medical Formula approvals meet the criteria.

Go ahead and toggle it on.

<no audio> Toggle on Priority.

Edit Alert 4

Our Subject is now required.

Go ahead and select it from the dropdown.

<no audio> Select the appropriate Subject from the dropdown.

Edit Alert 5

Click below the scrollbar.

<no audio> Select the appropriate Subject from the dropdown.

Edit Alert 6

<no audio> Select the appropriate Subject from the dropdown.

<audio – hint> Select Medical Documentation: Formula.

Edit Alert 7

We're going to update the contents of the alert.

Click at the beginning of the alert.

Edit Alert 8

We'll add that we received a new MFD on 3/19.

Go ahead and double-click on March...

Edit Alert 9

<screen description - no audio> March is highlighted blue.

Edit Alert 10

...and we'll change it to September.

We're going to delete the beginning of the next sentence, so click in front of the word "She".

Edit Alert 11

<no audio> Cursor highlights: She will need a new MFD in March 2024, when over 6 months old.

Edit Alert 12

<screen description - no audio> Sentence is highlighted in blue.

Edit Alert 13

And we'll add the word "Approval".

Edit Alert 14

Save the revised alert.

<no audio> Click the Save button.

Edit Alert 15

Since our alerts are ordered by date and we kept the original date, we have to select the row to view the revised alert.

Do that.

<no audio> Select the 11/03 alert row to view it.

Edit Alert 16

When we modify an alert, our staff ID and the date are listed next to Changed by and Changed Date.

We should note if someone else updates the alert in the future, their staff ID and that date will display.

It only shows the most recent modifier.

We now have two Priority alert subjects in our headers.

Let's click around a little to this.

Select Manage eWIC Account from the sidebar.

Priority Alert 2

Now select Grace from the Participant Menu.

Priority Alert 3

<no audio> Select Grace from the Participant Menu.

Priority Alert 4

Now let's close the folder.

<audio – hint> Click Search on the sidebar.

Priority Alert 5

Toggle on Show Details.

Priority Alert 6

Click on Ruth's card.

Priority Alert 7

OK. Double-click on Ruth's card to re-open her folder.

<Waiting>

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

Enter Shortcut

If we don't delete an alert, the cursor focus is on the Close button, so we can just hit the Enter key as a shortcut to close the modal. Do that.

<no audio> Press the Enter key on the keyboard to close the modal.

Priority Alert 8

Re-open Manage Alerts.

<no audio> Select Manage Alerts from the sidebar.

Delete 1

As mentioned earlier, we can delete any alerts.

Select the 10/31 alert row.

Delete 2

We no longer need this alert (referrals have been documented and the release of information scanned).

How do you think we delete the alert? Go ahead.

<audio -hint> Click the Delete button.

Delete 3

<no audio> How do you think we delete the alert? Go ahead.

<audio – hint> Click the Yes button.

Copy to Note 1

There are instances whereby a temporary alert should become a permanent part of the record, hence, the Copy to Note function.

This is also a very handy shortcut for duplicating a note for multiple household members.

We will see and use this function quite a bit in other training modules.

We are going to copy our updated Medical Formula alert to a note to permanently document the approval.

Select it in the grid then click the button.

<no audio> Select the Medical Documentation: Formula alert in the grid then click the Copy to Note button.

Copy to Note 2

<no audio> Select the Medical Documentation: Formula alert in the grid then click the Copy to Note button.

Copy to Note 3

The Subject is required, and although our alert has a subject, notice that it didn't auto-populate, which means we'll always have to select it again.

Click the Subject dropdown.

Copy to Note 4

This time let's use a keyboard shortcut to select Medical Documentation: Formula.

Press the M key on the keyboard.

Copy to Note 5

Press the M key again.

<no audio> Press the M key on the keyboard.

Copy to Note 6

And press the Enter key on the keyboard.

Copy to Note 7

We can also edit our Note Text.

Click next to the word "solids" ...

Copy to Note 8

...and we'll add that the MFD was sent electronically, it's been imported and saved to the folder, and we'll also add our initials.

Copy to Note 9

The Household Members grid lists all members of the household, regardless of activity or age. The Copy column indicates who will be included, and the grid lists their State WIC ID and their name.

It automatically selects the person whose folder we are working in.

ALERTS

We can select all household members at once by toggling on Copy in the column header. Go ahead and do that.

<no audio> Toggle on Copy in the column header.

Copy to Note 10

De-selecting a member...go ahead and toggle off Ruth since we don't want to copy this note to her folder...

Copy to Note 11

...automatically toggles off Copy in the column header.

We're done so click the Save button.

Copy to Note 12

Go ahead and select the Medical Documentation alert one more time.

<no audio> Select the Medical Documentation: Formula alert in the grid.

Copy to Note 13

Notice that the changes we made to the Note Text are not also made to the original alert.

Let's verify our note.

Select Manage Notes from the sidebar.

Copy to Note 14

<Waiting> <screen description – no audio> Spin icon displays.

As expected, no note.

Select Grace from the Participant Menu.

Copy to Note 15

<no audio> Select Grace from the Participant Menu.

Copy to Note 16

And there it is including our text changes.

One last note.

Since we saved the alert to a note, we are the person recorded as having created the note (which makes sense).

The Created By and Created Date do not change and reflect who created the original alert and when and the Changed By and Changed Date continue to be the person and date of the last modification to the alert.

Conclusion

This concludes our review of Manage Alerts.

Click the button to continue.

Knowledge Test

True/False Q#1

True or False?

We must always be in the folder of the participant for whom we are writing the alert.

Answer #1

The answer is False.

Only if we were to write Participant-level alerts would that make a difference. Since all of our alerts are household-level, we can write them from any member's folder.

Multiple Choice Q#2

Which statement is NOT true?

We can edit and delete any alerts at any time.

Subjects are required for Priority alerts but can be selected for any alert.

Changes we make to the Note Text when copying an alert to a note do not display on the original alert.

We should always delete alerts once they become outdated or irrelevant.

When editing, we must update the Active Date since it can only be today or a future date.

Answer #2

The answer is E.

We can maintain the original Active Date when editing alerts, even if it's in the past.

End

End Slide

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.

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