Calendar 2 – Resources – WINNIE Online Training Module

MAY 2023

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is an overview of Resources, which are used when creating the WIC calendar for scheduling participant appointments in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being May 8, 2023.

Resources

<Transition Slide>

<screen description – no audio> Slide transitions from topic slide to Clinic Schedule page.

Clinic Scheduler 1

We are starting this module in the Clinic Schedule page.

Our focus is going to be on Resources, which are the names of our appointment columns.

We are going to add a new resource, edit Breastfeeding, deactivate Phone Follow-up and delete an unused resource.

Let's return to creating our calendar. Go ahead. Click anywhere for a hint.

<audio – hint> Click the Toggle Applications icon, or Clinic Services, on the blue header.

Return to Calendar 1

<audio – hint> Select the Agency Administration module.

Resources 1

Once we have our Appointment Types defined, our next step is Resources.

Click Resources on the sidebar.

Resources 2

Resources work a lot like Appointment Types.

If we add a new resource, it is available to all clinics.

If we edit a resource, and it's currently on the schedule, the edited version displays in our Scheduler.

If we deactivate a Resource, the Resource continues to display in the Scheduler but is no longer available as an option in dropdowns.

And we can only delete a resource that isn't currently in use.

Resource Grid 1

The read-only grid displays our existing resources and if we have more than 30, multiple pages will display.

Resources represent staff that can be scheduled for appointments and are specific to our agency.

Resource ID 1

The Sort Resources button is supposed to allow us to dictate the order of our resource columns in the clinic Scheduler. Currently, this function does not work.

The Resource ID, a statewide system-generated number that cannot be changed, can be used to control the order of our appointment columns in the Scheduler if this is important to us.

Resource ID 2

Notice that gaps exist between our IDs, which is due to the ID range being shared by all agencies.

Resource ID 2A

The order of our columns will display in descending Resource ID order, or highest to lowest, and we'll see this in play in a little bit.

Resource ID 2B

As a sidenote the Resource ID displays in ascending order, or lowest to highest, in this grid.

Resource Grid 2

The Active toggle indicates if the resource is available to use.

Like the Appointment Types grid, we can change the sort order of the columns by clicking the header.

We can search for specific resources, all, active or inactive, using the filter at the top of the page, which can be handy if we have a lot of resources.

We've just hired a Somali CPA that we want to add as a Resource.

Click the Add button.

WIC STAFF: We have our new Somali CPA that we need to add as a resource.

Add Resource 1

For the Resource Name, we can use generic descriptions such as Somali 1 or we can use staff names.

It has a limit of 50 alphanumeric characters and it accepts a apostrophes, commas, periods, hyphens, and spaces.

As usual, Active is default toggled on.

MN WIC does not use the Associate Username toggle, so we won't review that function.

Let's name our new resource: Somali 1.

Type Somali 1 and click the Save button.

WIC STAFF: We use generic names, so Somali 1 it is.

Add Resource 2

<no audio> Click the Save button.

Edit Resource 1

Since our new resource has the highest Resource ID, it displays as the last row in the grid.

Were going to clarify the name of our Breastfeeding resource by changing it to BF Peer.

Like all grids in WINNIE, we can click the row to highlight and click Edit, or double-click the row.

<no audio> Double-click the Breastfeeding row.

WIC STAFF: Hmmm. Breastfeeding. That's our BF Peer, not an IBCLC. We should clarify that...

Edit Resource 2

Double-click inside the Resource Name field to highlight it.

Edit Resource 3

Type: BF Peer

Edit Resource 4

And click Save.

Deactivate Resource 1

Next, we are going to deactivate Phone Follow-up because we already have that as an Appointment Type.

Double-click that row.

<no audio> Double-click the Phone Follow-up row.

> WIC STAFF: Well. That's redundant! We don't need a Phone FU Appointment Type and Resource.

Deactivate Resource 2

Go ahead and deactivate it. Click anywhere for a hint.

<audio – hint> Toggle off Active.

Deactivate Resource 3

<audio – hint> Click the Save button.

Delete 1

Like Appointment Types, a Resource can only be deleted if it isn't associated with a schedule or participant record.

Try to Delete CPA 1. Click anywhere for a hint.

<audio – hint> Click to select the CPA 1 row.

Delete 2

<audio – hint> Click the Delete button.

Delete 3

<audio – hint> Click the OK button.

<screen description – no audio> Information message displays that reads: this record is in use and cannot be deleted.

Delete 4

Now delete RD 1. Click anywhere for a hint.

<audio – hint> Click to select the CPA 1 row.

Delete 5

<audio – hint> Click the Delete button.

Delete 6

<audio – hint> Click the Yes button.

Waiting

<screen description – no audio> Small spin icon displays.

Resource ID

That's really all there is to managing Resources.

We are going to return to the Clinic Schedule and see how the changes we made impact our current schedule but before we do that let's take note of the Resource ID.

We mentioned earlier that the Resource ID determines the left-to-right order that our Resource columns display on the scheduler pages and that it orders them highest to lowest.

So, based on this, our resources scheduled for today will display from left to right: CPA 4, Phone Follow-up which was deactivated, BF Peer which was edited, and CPA 1.

Return to Scheduler 1

OK. Now let's return to the Clinic Schedule. Go ahead. Click anywhere for a hint.

<audio – hint> Click the Toggle Applications icon, or Agency Administration on the blue header.

Return to Scheduler 2

<audio – hint> Click the Clinic Services module.

Search

<audio – hint> Click Clinic Schedule on the sidebar.

Waiting

<screen description – no audio> Spin icon displays.

Verify 1

Let's verify…the order of our Resource columns from left to right is CPA 4 (ID 689), Phone Follow-up (ID 651), which continues to display despite being deactivated, BF Peer (ID 99), which displays our edited name, and CPA 1 (ID 96).

This concludes our overview of Resources.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

Resources represent staff that can be scheduled for appointments and are specific to our clinic.

Answer #1

The answer is False.

Resources do represent staff that can be scheduled for appointments, but they are specific to each **agency**.

Multiple Choice Q#2

Multiple Choice: Which statement is **not** true about the Resource ID? (single answer)

A. The highest Resource ID will be the left-most Resource column on the scheduler pages.

B. We can change the Resource ID to control the order of our Resource columns on the scheduler pages.

C. The Resource ID is system-assigned.

D. Gaps may exist between Resource IDs because the consignment range is shared statewide.

E. None. All of these statements are true.

Answer #2

The answer is B.

The Resource ID is system-assigned and therefore, **cannot** be changed.

However, the highest Resource ID will be the left-most Resource column on the scheduler pages and the IDs may have gaps because the range is shared with all agencies, or statewide.

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.

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, www.health.state.mn.us; to obtain this information in a different format, call: 1-800-657-3942.

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