

Scheduler 1B - Overview – WINNIE Online Training Module

JUNE 2023

Introduction

Intro

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

Topic

Date

All dates in this module are based on today's date being June 22, 2023.

Legend 1

We're continuing our review of the Calendar panel in the Scheduler.

Let's take a closer look at the legend.

Click below the outer scroll bar.

Appt Colors 1

Appointment types can be color-coded, like the Nutrition Visit, which is yellow.

In general, we'll use colors sparingly since it can impact the rate at which our calendar loads.

In this instance, it was used to be able to, at-a-glance, determine the number of this type of appointment.

This time, click below the internal scroll bar.

Appt Colors 2

In WINNIE, we are able to schedule an appointment for one participant or multiple members of a household.

The single person graphic represents an appointment for an individual participant and displays their full name, last then first.

The graphic with multiple people represents a household appointment.

If there are multiple last names for members of a household, the last name that displays, along with the household ID, is the last name that comes first alphabetically for those members included in the appointment.

For households, if any of the members have a nutrition visit, the outline will be yellow.

The amount of the outline that is yellow is proportional to the number of members scheduled with that type of appointment.

For individual appointments, the whole block is that color.

Appt Colors 3

Other appointment types are either gray or white.

White if they are a household appointment, or a new type where a color wasn't added, and gray for any existing appointment types.

Group Education classes are bright yellow.

Configuration 1

The Scheduler Configuration allows us to temporarily change how the calendar displays.

The default of 30 minutes and 2 slots has been set for optimal viewing of the calendar and provides half-hour time increments with two 15-minute blocks of time.

We can change it while viewing the calendar by selecting from the dropdowns.

Let's see how changing it impacts the calendar.

Click the Interval dropdown.

Configuration 2

Select 60 minutes.

<Waiting>

<screen description – no audio> Spin icon displays.

Configuration 3

Not really ideal for shorter appointments or classes.

This time, click the Slot Count dropdown.

Configuration 4

Select a Slot Count of 1.

<Waiting>

<screen description – no audio> Spin icon displays.

Configuration 5

Might be helpful to get the big picture for a day.

Last time. Select a slot count of 4.

Configuration 6

<no audio> Select a slot count of 4.

<Waiting>

<screen description – no audio> Spin icon displays.

Configuration 7

We get the idea.

We can modify it **while** viewing the Scheduler pages, but this change is not maintained.

Once we exit the Scheduler, it reverts to the default the next time it's opened.

Refresh 1

The Refresh button updates any appointments that may have been made by other staff while we were viewing the page, and helps to ensure we aren't accidentally overbooking, which WINNIE does allow as we'll see in another training module.

Using the Refresh button can be especially handy when same-day or flexible scheduling since so many appointments are being scheduled at one time.

Go ahead and click the Refresh button.

<Waiting>

<screen description – no audio> Spin icon displays.

Refresh 2

A new appointment was scheduled at 10, as well as...

...click below the internal scroll bar...

Refresh 3

...a new appointment at 1:00.

Click the button to continue.

Generate Clinic Schedule

<Transition Slide>

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

Clinic Schedule 1

Let's continue our review of the Calendar on the Scheduler page.

Let's take a look at the Clinic Schedule output. Go ahead and click the button.

<no audio> Click the Generate Clinic Schedule button.

Clinic Schedule 2

The Generate Clinic Schedule modal opens with all of our agency's resources auto selected.

Go ahead and click the OK button.

Clinic Schedule 3

The output automatically opens in another tab in our default browser, which means it's a temporary file that doesn't download until we save or print it.

Remember, once downloaded we must ensure, since this contains private data, that whether via an automated or manual mechanism the electronic file is deleted at the end of our workday and if we print it, the hard copy is also destroyed as appropriate.

The output is for the clinic and date we are **currently viewing** in the Scheduler.

Clinic Schedule 3A

It's sorted by the appointment start time then State WIC ID.

It's columns include the start time, appointment length, resource column, whether for a household or an individual participant (notice that household members have the same start time and individual rows), what the appointment is for, the participant's State WIC ID and Household ID, the participant's and their Authorized Rep's name, the WIC category selected for the appointment, whether they are high Risk, Phone 1 and its comment, language 1 and whether an interpreter is needed, if there was confirmation information documented, whether the appointment is kept as of the current time, and whether a missed follow up was documented.

This is a fairly long output so we're just going to look at one more page.

Click below the scroll bar.

Clinic Schedule 3B

There are a couple of things that aren't ideal about this output.

Subsequent pages do not have column headers.

For most columns, it's easy to remember what-is-what, but for those that display an N or Y...maybe not so much.

Also, it's sorted by State WIC ID instead of Household ID.

What this means is members of the same household may not display together in the output.

Click the button to continue.

Clinic Schedule 4

Our breastfeeding peer would like to prepare for her appointments at Clinic 168 – Forest Lake on June 29th.

We're going to generate the clinic schedule for her.

Since our output is based on the date and clinic we are viewing in the Scheduler, first, let's select the 29th using the dropdown calendar.

Clinic Schedule 5

<no audio> Select June 29th using the dropdown calendar.

<Waiting>

<screen description – no audio> Spin icon displays.

Clinic Schedule 6

Since we've collapsed the Schedule Appointment panel, we need to re-expand it in order to select a different clinic. Go ahead and do that.

Clinic Schedule 7

Select Clinic 168 – Forest Lake from the Clinic dropdown.

Clinic Schedule 8

<no audio> Select Clinic 168 – Forest Lake from the Clinic dropdown.

<Waiting>

<screen description – no audio> Spin icon displays.

Clinic Schedule 9

Now that we are viewing the correct date and clinic, we can generate the schedule for the BF Peer resource.

Click the Generate Clinic Schedule button.

Combo Box 1

The Resource(s) are contained within a combo dropdown box, which is pretty commonly used in WINNIE.

When they are highlighted, or our cursor's focus, an x displays in the right corner that allows us to delete all in one click.

If we click somewhere else...go ahead and click anywhere outside of the combo box...

<audio – hint> Click outside of this box.

Combo Box 2

...it's no longer highlighted, and the "Delete All" x only displays if we hover over the combo box.

Go ahead and do that. Click the button to continue.

<no audio> Hover over the combo box then click the button to continue.

Combo Box 3

We can selectively delete individual resources by clicking the small x inside each resource block.

Go ahead and delete RD then CPA 3.

<no audio> Click the x in the RD block then click the x in the CPA 3 block.

Combo Box 3A

<no audio> Click the x in the RD block then click the x in the CPA 3 block.

Combo Box 4

Once the combo box no longer displays all options, we can click inside it to display the dropdown.

Go ahead and do that.

<no audio> Click inside the combo box to display the dropdown.

Combo Box 5

The dropdown only displays what we haven't selected.

Now let's click the "delete all" x in the bottom right corner.

Comb Box 6

We can also use hot keys, or the keyboard, to select from the dropdowns.

By typing the first letter, or first couple of letters, of our selection, WINNIE will filter any that begin with something else.

We want BF Peer so let's type a "b" into the Resource(s) box.

<no audio> Type "b" into the Resource(s) box.

Comb Box 7

Since BF Peer is auto selected as the only option left, we can just press the Enter key on our keyboard to select it.

Go ahead and do that.

<no audio> Press the Enter key on the keyboard to select BF Peer.

Clinic Schedule 10

Click OK to generate the output.

<no audio> Click the OK button.

Clinic Schedule 11

Remember, it can take a few seconds for a document to open in another browser tab.

Clinic Schedule 12

Click the button to continue.

Calendar 1

Let's return to Clinic 166 – Washington County.

Go ahead. Click anywhere for a hint.

<audio – hint> Click the Clinic dropdown.

Calendar 2

<audio – hint> Select Clinic 166 - WASHINGTON CO GOVERNMENT CENTER.

<Waiting>

<screen description – no audio> Spin icon displays.

Calendar 3

Let's collapse the Schedule Appointment panel again.

<audio – hint> Click the minus sign icon in the far right of the Schedule Appointment panel header.

Calendar 4

Let's look at our month view again. Go ahead. Click anywhere for a hint.

<no audio> Change to Month view. Click anywhere for a hint.

<audio – hint> Click the Month button on the far right under the Calendar header.

<Waiting>

<screen description – no audio> Spin icon displays.

Calendar 5

We'll continue our review of the Scheduler pages in the next training module.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

Changes we make to the Scheduler Configuration are maintained until we logout.

Answer #1

The answer is False.

Changes made to the Scheduler Configuration are maintained only until we exit the Scheduler pages. They revert to the default once we return to the Scheduler.

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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