

Scheduler 1C – 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's a continued 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.

Calendar Functions

<Transition Slide>

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

Calendar 5

All the calendar views (Day, Week or Month) have the same functionality.

When we hover over an appointment row, it displays its details.

Go ahead and hover over the 8:30 – 9:00 AM household appointment on June 15th.

Click the button to continue.

Calendar 6

We can single-click an appointment row to view all of its information.

Click the 8:30 – 9:00 AM household appointment on June 15th.

Details Modal 1

The Household Appointment Details modal opens.

For now, we'll just walk through the information this modal provides.

The details in the top section pertain to the household and include appointment date, start and end time, resource column, Household ID, household language, and whether an interpreter is needed.

We can choose to document if a reminder call was made and can also add then edit the comment.

Lastly, it provides their telephone number.

Details Modal 2

The information in the bottom section is specific to each member of the household and includes what the appointment is for, who it is for, their category, whether they are high risk, and whether they had the appointment, which we can update.

The current Kept status **for the household** displays in the modal header.

The status is dependent on the Kept toggle, which toggles on only if **all** household members kept their appointment.

Details Modal 2A

If toggled off, as we see here, the header displays missed.

If toggled on, it displays kept.

Details Modal 3

We can also choose to document if we contacted them after having missed an appointment and can add then edit follow-up comments.

We are also able to directly open their participant folder from here regardless of whose participant folder we are currently in.

Go ahead and click the Open Folder icon in Sibil's row.

<Waiting>

<screen description – no audio> Spin icon displays.

Open PF1

Since we're opening the folder, alerts display. Go ahead and close them.

<no audio> Close the alert.

Open PF 2

We are now in Sibil's folder.

Let's return to the Scheduler. Go ahead. Click anywhere for a hint.

<audio – hint> Click on Scheduler in the Calendar section of the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Open PF 3

Go ahead and collapse the Schedule Appointment panel again. Click anywhere for a hint.

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

Open PF 4

Lastly, let's return to the Month view for June. 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.

Open PF 5

And again, click the 8:30 to 9 AM household appointment on June 15th.

Open PF 6

This time, click the Open Folder icon in Cora's row.

Transfer Msg

So, why are we seeing this message informing us that Cora is in a different agency and needs to be transferred to open her folder when we can only schedule appointments for participants that belong to our agency?

There are two possible reasons.

One. When scheduling for a household, the system doesn't check if all the members are currently in our agency; it only requires that the participant for whom the Scheduler was opened belongs to our agency.

Two. When a participant is transferred from Agency 88, if they aren't immediately certified, they continue to meet the purge requirements and the system will return them to Agency 88 during the End-of-Day process.

However, to open the folder, the participant must belong to our clinic, so the system initiates a transfer.

We aren't going to continue with opening her folder so go ahead and click No.

<Waiting>

<screen description – no audio> Spin icon displays.

Details Modal 4

Now let's take a look at the Details modal for an individual participant's appointment.

Click the 11:30 – 11:45 AM appointment row on June 15th.

Details Modal 5

This time the Appointment Details opens.

It has all the same information and functionality as the household modal.

Do you notice anything missing on the details' modals?

There isn't a close button.

To close it, we have to click anywhere outside of it.

Go ahead and do that.

<audio – hint> Click anywhere that isn't part of the Appointment Details modal.

<no audio> Click anywhere outside of the modal to close it.

Calendar 7

OK. Let's go back to July.

Go ahead and use the next (or right-facing) arrow icon.

<Waiting>

<screen description – no audio> Spin icon displays.

Calendar 8

Click the 12:15 to 1:45 PM household appointment row on June 30th.

Details Modal 6

The same household or participant-level modal opens for future appointments except that it has the additional functions that allow us to edit, reschedule, or delete the appointments, which we'll take a look at in a future training module.

It also has a close button. 😊

Go ahead and click Close.

<Waiting>

<screen description – no audio> Spin icon displays.

Calendar 9

For current and future dates, we can also double-click an **appointment row** to open the Edit modal.

Go ahead and double-click the 10 to 11:15 Household appointment on June 30th.

Calendar 10

We're still in overview mode, so click the Cancel button.

Calendar 11

Now double-click the 1:45 to 2PM appointment on June 30th.

Calendar 12

Again, just taking a quick gander. Click the Cancel button.

Calendar 13

Although we just focused on the the month view, all of the functionality we just looked at applies to all views, whether it's day, week, or month.

That's it for our calendar overview.

In the next module, we'll take a look at scheduling appointments.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

When in Month view, double-clicking in the empty space of a calendar date will jump us to the day view for that date.

Answer #1

The answer is True.

We can double-click a date in the calendar, as long as it isn't on an appointment row or block, to jump to its Day view when we are currently in month view.

Multiple Choice Q#2

Which statement is true? (single answer)

- A. Double-clicking past appointments opens the Edit modal.
- B. We can generate the Clinic Schedule for any clinic in our agency from the Scheduler page within a participant folder.
- C. We can edit, reschedule, and delete appointments scheduled for any appointment on the calendar.
- D. Once a participant is transferred from agency 88, as long as we make some kind of change to the participant folder, they'll remain in the clinic we transferred them into.
- E. The Appointment Details modal is completely read-only for appointments scheduled for past dates.

Answer #2

The answer is B.

We can generate the Clinic Schedule for any clinic in our agency using the Clinic dropdown in the Schedule Appointment panel of the Scheduler, which is within the participant folder.

Explanations for Other Answers:

A – Double-clicking past appointments has no functionality; it can only be used with current or future appointments to open the Edit modal.

C – We can only edit, reschedule, and delete current and future appointments.

D – Once a participant is transferred from 88 into our clinic, if they aren't immediately certified they will continue to meet the purge criteria and will be moved back to agency 88 as part of the End-of-Day process.

E – The Appointment Details modal for past appointments has some functions including confirm, followed-up, kept and open folder.

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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