

Scheduler 2B – Participant Appointments - WINNIE Online Training Module

JULY 2023

Introduction

Intro

This online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides a continued overview of scheduling individual participant appointments in WINNIE, the MN WIC Information System.

Appointments Page

Date

All dates in this module are based on today's date being July 3, 2023.

<Transition Slide>

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

Search 1

Let's start with the Appointments page.

Double click on Hugh's participant card to open his folder.

<Waiting>

<screen description – no audio> Spin icon displays.

Alert 1

Close the alert.

Appts Page 1

Click Appointments on the sidebar.

Appts Page 2

The Appointments page provides household-level information, which means any appointments scheduled for members of the household will display regardless of the participant folder we are working in.

Remember, appointments are maintained in the database until 90 days after the appointment date, which is how long they display on this page.

The first tier of information includes whom the appointment is for, its date and time, what it's for and whether it was made for just one member or for multiple household members.

We can view the second tier of information by clicking the arrow to the left of the participant's name.

Go ahead and click the arrow in the first row.

Appts Page 3

Once expanded the panel displays where the appointment is scheduled, with whom, the household language and whether an interpreter is needed, any comment that was added, its current status, when it was scheduled and who scheduled it.

We can view the entirety of the comment by hovering over it. Go ahead and do that then click the button to continue.

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

Delete 1

The Delete button allows us to remove future appointments from the calendar.

If we were to try to delete appointments in the past...

Delete 2

...a message displays informing us that we can't because it is in the past.

Delete 3

We probably won't use the delete function on the Appointment page to remove appointments **from our own calendar**.

<Transition Slide>

However, it may come in handy because it allows us to delete future appointments scheduled at other agencies.

Delete 4

When a household transfers to our agency, any appointments they may have already scheduled at another agency remains on that agency’s calendar.

Best practice is to delete appointments scheduled at other agencies once the household has been transferred to our agency.

Double-click on Adora’s participant card to open her folder and initiate the transfer.

Transfer 1

Click the Yes button.

Transfer 2

Click the OK button.

<Waiting>

<screen description – no audio> Spin icon displays.

Alert 2

Close the alert.

Transfer 3

Click the Send eWIC Data button to complete the transfer.

<Waiting>

<screen description – no audio> Spin icon displays.

Delete 5

Let’s return to the Appointments page.

<no audio> Click Appointments on the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Delete 6

First, notice that although we were in Adora's folder, as we mentioned earlier, a participant-level appointment displays for Kay.

Also notice that the top three appointments are Household-level and as such, all have the same start time.

Go ahead and expand Adora's row. Click anywhere for a hint.

<no audio> Click the arrow to the left of Bull, Adora.

Delete 7

Let's make a note that this household appointment is scheduled at Hennepin Clinic 089 for Resource EA6 at 1:00 PM on July 7th.

Delete 8

When we delete household appointments, it is all or nothing.

Meaning, if we delete one appointment, we delete the whole household appointment.

Since Adora's row is already selected or highlighted, we just click the delete button to delete the household's appointment.

Go ahead and do that.

<no audio> Click the Delete button.

Delete 9

A validation displays, and yes, we are sure.

Click the Yes button.

Delete 10

As promised, all or nothing.

<Transition Slide>

<screen description – no audio> Slide transitions from Appointments page to Clinic Schedule page in Hennepin County.

Delete 11

Taking a look at the Clinic Schedule for Hennepin County, Clinic 89, we can see that Resource EA6 no longer has a 1:00 PM appointment.

By deleting these appointments, we are helping to keep no-show rates down and opening up appointments for other participants and households that still belong to the agency they transferred from.

<Transition Slide>

<screen description – no audio> Slide transitions from Clinic Schedule page in Hennepin County to Topic page.

Scheduling at Other Clinics

<Transition Slide>

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

Other Clinic 1

We can schedule appointments at other clinics in our agency as well.

Pete belongs to our current clinic, but we are going to schedule a follow-up appointment at the Forest Lake clinic.

Go ahead and open the Scheduler page.

<no audio> Open the scheduler using the calendar icon on the participant card.

PARTICIPANT: “Hi! I usually go to WIC in Stillwater but Forest Lake works better for me this time.”

WIC STAFF: Absolutely! Wherever works best for you...

<Waiting>

<screen description – no audio> Spin icon displays.

Other Clinic 2

Everything looks good in the Schedule Appointment panel, except for the clinic.

To schedule at a different clinic, we simply select it from the Clinic dropdown.

Go ahead and do that.

<no audio> Click the Clinic dropdown and select Clinic 168 – FOREST LAKE.

Other Clinic 3

<no audio> Click the Clinic dropdown and select Clinic 168 – FOREST LAKE.

<Waiting>

<screen description – no audio> Spin icon displays.

Other Clinic 4

Since we're not very familiar with Forest Lake's schedule, let's take a look at their Month view. Go ahead.

<no audio> Click the Month button.

<Waiting>

<screen description – no audio> Spin icon displays.

Other Clinic 5

Click below the outer scroll bar.

Other Clinic 6

We're going to schedule the appointment on Wednesday.

Open the day view for Wednesday the 5th (without using the dropdown calendar). Click anywhere for a hint.

<audio – hint> Double-click in the blank space on the June 5th date (not on the block or appointment rows).

WIC STAFF: We have some time later today or Wednesday...?

PARTICIPANT: "Mornings are better. Do you have something Wednesday morning?"

<Waiting>

<screen description – no audio> Spin icon displays.

Other Clinic 7

We can fit Pete's appointment in at 9:45.

Go ahead and schedule the appointment. Click anywhere for hints.

<audio – hint> Double-click the 9:45-10:00 AM slot.

<no audio> Schedule the 9:45 AM appointment for Pete. Click anywhere for hints.

WIC STAFF: We have one at 9:45 in the morning...?

PARTICIPANT: “That’s perfect.”

<Waiting>

<screen description – no audio> Spin icon displays.

Other Clinic 8

<no audio> Schedule the 9:45 AM appointment for Pete. Click anywhere for hints.

<audio – hint> Click the Schedule for Moss, Pete button or press the Enter key on the keyboard.

Other Clinic 9

<no audio> Schedule the 9:45 AM appointment for Pete. Click anywhere for hints.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Other Clinic 10

Let’s take a look at his Appointments page.

<no audio> Click Appointments on the sidebar.

Other Clinic 11

Go ahead and expand the row.

<no audio> Expand the row. Click anywhere for a hint.

<audio – hint> Click the arrow to the left of Moss, Pete.

Other Clinic 12

Click the button to continue.

Their Clinic 1

As we saw previously, we can also schedule appointments for participants that belong to other clinics within our agency without having to transfer them.

We are going to schedule the one-year recert for Ollie on or after his first birthday at the Forest Lake clinic, where they currently belong.

Open the scheduler by clicking the calendar icon on **Ellie’s** participant card.

PARTICIPANT: “Hi. I was supposed to call to schedule a one-year appointment for Ollie...?”

WIC STAFF: Great! The Forest Lake clinic works for you?

<Waiting>

<screen description – no audio> Spin icon displays.

Their Clinic 2

The Clinic defaults to their clinic and displays that clinic’s calendar.

We continue to work in our original clinic and the participant folder does not open.

Their Clinic 3

Like other Participant menus in WINNIE, all members of the household except for children over 5 years old are listed.

Since we clicked the icon on Ellie’s participant card, her last name, first name, State WIC ID, and current age display.

Go ahead and click the dropdown.

<no audio> Click the Participant Menu dropdown.

Their Clinic 4

The participant menu is one method for selecting another member of the household to schedule an appointment for.

The other is scheduling a household appointment, which we’ll see in the next training module.

We’re scheduling for Ollie so click on his name.

<no audio> Click on Phant, Ollie.

Their Clinic 5

We are scheduling a one-year recertification. Select the appropriate Appointment Type.

<no audio> Select Recertification from the Appointment Type dropdown.

Their Clinic 5A

<no audio> Select Recertification from the Appointment Type dropdown.

Their Clinic 6 - SYNC

Notice that based on our Appointment Type selection, our Duration updated to 30 minutes.

However, our WIC Category is Infant, which is what Ollie is **today**.

But we are going to schedule his recert on or after his first birthday, as is best practice, which means he'll be a child.

In WINNIE, we can update the WIC Category to match what it will be at the time of the appointment, if it's different from the category that is currently displaying on their Demographics page.

Let's do that. Select Child from the WIC Category dropdown.

Their Clinic 7

<no audio> Select Child from the WIC Category dropdown.

Their Clinic 8

We know from the last appointment we scheduled that there are appointments open on Ollie's birthday, July 7th.

Let's see if they're still available.

Select July 7th from the calendar dropdown.

WIC STAFF: I know there were appointments available before on the 7th...

WIC STAFF: If we have an appointment open would you want to come in on Ollie's birthday?

PARTICIPANT: "Sure. Do you have any appointments around 3:00 in the afternoon?"

Their Clinic 9

<no audio> Select July 7th from the calendar dropdown.

<Waiting>

<screen description – no audio> Spin icon displays.

Their Clinic 10

Because of our limited screen real-estate in this training module, let's once again collapse the Schedule Appointment panel to better view the Calendar. Go ahead.

<no audio<> Collapse the Schedule Appointment panel.

Their Clinic 11

And because we can't scroll in our training module, we are going to click below the scroll bars to view our open appointments.

We are looking for a 30-minute block around 3PM.

Click below the internal scroll bar until we're at the end of the day.

WIC STAFF: I need a 30-minute block around 3PM.

Their Clinic 12

<no audio> Click below the internal scroll bar.

Their Clinic 13

Go ahead and schedule the appointment for Ollie at 3:00. Click anywhere for a hint.

<audio – hint> Double-click the 3:00 appointment slot or row.

WIC STAFF: We have a 3:00.

PARTICIPANT: "Perfect."

Their Clinic 14

<no audio> Schedule the appointment for Ollie at 3:00. Click anywhere for a hint.

<audio – hint> Click the Schedule for Phant, Ollie button or press the Enter key on the keyboard.

Their Clinic 15

<no audio> Schedule the appointment for Ollie at 3:00. Click anywhere for a hint.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Their Clinic 16

Since we can't open Ollie's folder without transferring him, let's verify the appointment in Show Details. Go ahead. Click anywhere for a hint.

<audio – hint> Click Search under Participant List on the sidebar.

<no audio> Verify Ollie’s appointment in Show Details. Click anywhere for a hint.

Their Clinic 17

Select Ollie’s card first.

<no audio> Verify Ollie’s appointment in Show Details. Click anywhere for a hint.

<audio – hint> Click on Ollie’s participant card to select or highlight it.

Their Clinic 18

<no audio> Verify Ollie’s appointment in Show Details. Click anywhere for a hint.

<audio – hint> Toggle on Show Details.

Their Clinic 18

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

We should never delete appointments scheduled at other agencies when a household transfers to our agency.

Answer #1

The answer is False.

If a household transfers to our agency and has future appointment(s) scheduled at another agency, best practice is to delete the appointment(s). This will help the other agency’s no-show rate and open up appointments for other participants or households that still belong to that agency.

Multiple Choice Q#2

Which statement is false? (single answer)

- A. We always have to transfer a participant if they belong to another **agency** to schedule an appointment.
- B. We can change the participant’s WIC Category to match what their category will be at the time of their appointment.

- C. We can schedule appointments for other household members by selecting from the Participant Menu.
- D. The Appointments page in the participant folder is household-level and lists all appointments for everyone in the household.
- E. We always have to transfer a participant if they belong to another **clinic** in our agency to schedule an appointment.

Answer #2

The answer is E.

If a participant belongs to another **clinic in our agency**, we do not have to transfer them to schedule an appointment. The system will not open the folder, which begins the transfer process, when we open the Scheduler, and the Scheduler will default display their clinic and that clinic's calendar.

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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