Local Use Questions 1 – WINNIE Online Agency Admin Training Module

OCTOBER 2024

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is an overview of Local Use Questions in Agency Administration in WINNIE, the MN WIC Information System.

Date 1

All dates in this module are based on today's date being October 1, 2024.

<Transition Slide>

<screen description – no audio> Slide transitions to Demographics page for Cammie Mille-Tea.

Overview

Overview 1

In this module and the next, we will review how to create and maintain Local Use Questions, which are agency specific questions used to collect information of interest to our agency.

Overview 2

We determine the questions, whether it will display for a participant, as well as their order, the answers, and the order of the answers in the dropdown.

Overview 3

A little overview of how it works.

When staff select an answer, the date and time the answer was selected is saved to the database.

If a different answer is later selected, a new record is created, and the date and time of that answer is also stored in the database.

This provides an historical record.

These are records are unaffected by participant transfers to other agencies, allowing our agency to report on all selected answers.

Go ahead and return us to the Module Launcher page.

<audio hint> Click on Clinic Services in the header.

Role 1

Maintenance of Local Use Questions is an Agency Admin role, and we must have WINNIE Agency Admin role 10.

When we have this role, we will see the Agency Administration button on the Module Launcher page.

Go ahead and click it.

<no audio> Click the Agency Administration button.

Sidebar 1

Local Use Questions is found under Lists.

Select it from the sidebar.

<no audio> Select Local Use Questions from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Agency

Agency 1

The Agency defaults to what we selected on the Locations modal when logging in or the agency we are currently working in while in Clinic Services.

Agency 2

If we have access to more than one agency, the Agency is a dropdown so that we can select to work in another agency without exiting this page.

It is a read-only header if we only have access to one agency.

Results Grid and Status Filter

Grid 1

The Local Use Questions page opens and auto-populates with a list of our agency's existing active and inactive Local Use Questions.

The Status dropdown in the Local Use Questions card…go ahead and click it…

Filter 1

…allows us to display only active or inactive questions.

Select Inactive then click the Search button.

Filter 2

<no audio> Select Inactive then click the Search button.

Inactive 1

Inactive questions, or those that don't display on the Demographics page anymore, are denoted by the circle-with-slash icon.

Go ahead and re-select All then click Search.

Filter 3-4

<no audio> Re-select All then click the Search button.

Filter 5

Let's just collapse this card. Go ahead.

<no audio> Click to collapse this card.

Active 1

We can have 6 active questions per WIC Category at one time.

Grid Sort Order

Sort 1

The order of the questions in the grid…

<Transition Slide>

<screen description – no audio> Slide transitions back to Demographics.

Sort 2

…determines the order the questions will display in Demographics.

<Transition Slide>

<screen description – no audio> Slide transitions back to Local Use Questions.

Sort 3

The grid icon indicates that we can change how the questions display in Demographics by dragging and dropping the row.

Sort 4

<video demo> We are going to click then drag the third Notice of Privacy Practices question above the C&TC Outreach questions.

Sort 5

Let’s check out the change in Clinic.

Return to clinic and double-click on Wynne Summe’s card to open her folder.

<audio – hint> Click on Agency Administration in the header.

Sort 6-7

<no audio> Return to clinic and double-click on Wynne Summe’s card to open her folder.

<Waiting>

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

Sort 8

Changes we make in Agency Admin immediately display in Clinic Services, so our Notice of Privacy Practices question now displays first in Demographics.

Go ahead and return to Local Use Questions.

<audio – hint> Click on Clinic Services in the header.

Sort 9-10

<no audio> Return to Local Use Questions.

<Waiting>

<screen description – no audio> Spin icon displays.

Sort 11

Let's collapse the filter card again.

<no audio> Click to collapse this card.

<Transition Slide>

<screen description – no audio> Slide transitions back to Local Use Questions.

Answers Grid

Expand 1

We can expand each question by clicking either the question itself or the Toggle Accordion icon at the right of each row.

Go ahead and expand the Notice of Privacy Practices question that we previously moved.

<no audio> Click to expand the Notice of Privacy Practices.

Answers Grid 1

This card is for our answers.

There are three columns: what we are collecting, how the answers display in the dropdown, and whether they display in the dropdown.

Answers Grid 2

Inactive answers created in Legacy will not display a Sort Order until we modify the answers in some way.

The buttons Add, Delete, Update and Cancel affect the answer grid.

So, let's add another answer to this question.

Click the Add button.

Cancel Button 1

Just FYI…the Cancel button becomes enabled when we add or edit and allows us to undo any changes before we save them.

Answers Grid 3

Our answers are limited to 50 characters, and allow letters, numbers, and special characters.

The Sort Order is initially assigned by the system and is one more than the highest number.

The Active toggle is toggled off by default.

Let's type our new answer that reads: Provided 2025

<no audio> Type: Provided 2025

Edit Answers

Edit Active 1

We want our new answer to display in the dropdown, so we have to make it active.

Notice there isn't an edit button on our grid's toolbar.

What do we usually do to edit grids? Double-click, right?

Go ahead and double-click the green-highlighted Active cell.

Edit Active 2

Now toggle on Active.

Save 1

OK. Save the changes to the grid.

<audio – hint> Click the Update button.

<Waiting>

<screen description – no audio> Small spin icon then blue spin icon displays at the same time.

Edit Sort 1

Two things.

Now that we've updated the grid, the system auto-assigned a Sort Order number to the inactive answer from Legacy and our answers are listed in ascending sort order.

But what if we want Provided 2025 to display first in our dropdown?

Well, we need to change its sort order to 1.

So, let's double-click the sort order cell in that row…

Edit Sort 2

…and double-click inside the text field to highlight the 2…

Edit Sort 3

…and change it to 1.

<no audio> Type: 1

Edit Sort 4

Notice our Update button isn't enabled yet.

We need to prompt the system to automatically update the sort order for the Provided 2024 row and we do that by clicking somewhere outside of that field.

Go ahead and do that.

<no audio> Click outside of the text field.

Edit Sort 5

WINNIE shifts the sort order for us, and Update is now enabled.

Go ahead and save our grid changes.

<no audio> Save the changes to the grid.

<audio – hint> Click the Update button.

<Waiting>

<screen description – no audio> Small spin icon then blue spin icon displays at the same time.

<Transition Slide>

If we were to return to Demographics…

<no audio> Slide transitions to Demographics in Wynne Summe's folder.

Answer Sort 1

…and click the Notice of Privacy Practices dropdown…

Answer Sort 2

…we would see our new answer and that it displays at the top of our list.

<Transition Slide>

<screen description – no audio> Slide transitions back to Local Use Questions page.

Edit Answer 1

We can also edit the active or inactive answer itself.

The one caveat is that when editing an answer, we should never change its meaning.

Delete Answers

Delete Answer 1

We can delete answers as long as no one has ever selected the answer for a participant.

Let's try to delete the Provided 2024 answer.

Select the row and then click the Delete button.

<no audio> Click the Provided 2024 row then click the Delete button.

Delete Answer 2

<no audio> Click the Provided 2024 row then click the Delete button.

Delete Answer 3

If the answer is in use, this message lets us know that it can't be deleted.

<Transition Slide>

<screen description – no audio> Slide transitions back to answer rows.

Delete Answer 4

Of note, we can multi-select answers using our Shift or Control keys, if we wanted to attempt to delete multiple answers at one time.

<Transition Slide>

<screen description – no audio> Slide transitions back to "unable to delete" message.

Delete Answer 5

Hence the message beginning with “One or more of the answers…”

Go ahead and click OK.

<no audio> Click the OK button.

<Waiting>

<screen description – no audio> Small spin icon then blue spin icon displays at the same time.

Reset Answers

Reset Answer 1

Lastly, what if this is information we collect every year and we want to ensure it’s answered for every participant seen during 2025?

Well, on December 31st, 2024 we can click the Reset Responses button to clear all of the answers currently selected in participant records.

Go ahead and click the button.

Reset Answer 2

The confirmation message displays.

If it’s December 31st and we were to click Yes, multiple things occur.

WINNIE will display the date and time we reset the answer.

An asterisk displays next to the time if the answer was last reset in the Legacy system.

The system also clears the answers from the question’s dropdown in Demographics in all the participant folders.

We should note that the date and time of the cleared answers were saved to the database when the answer was initially selected, and this is not impacted when we reset the answer.

<screen description – no audio> Slide transitions back to Confirmation message.

Reset Answer 3

We aren’t going to reset this answer now, so click No.

<no audio> Click the No button.

End Slide 1

We’ll continue our review of Local Use Questions in the next module.

Click the button to continue.

Knowledge Test

True/False Q#1

True or false?

We can no longer report on a participant's answer for Local Use Questions if the participant transfers to another agency.

Answer #1

The answer is False.

Once a Local Use Question is answered, a record is created in the database with the selected answer and the date and time that the answer was saved. This is a historical record that remains associated with the agency even if the participant transfers out of that agency.

End

End Slide 2

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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