

# Maintaining Medical Clinics and Providers – WINNIE Online Agency Admin Training Module

SEPTEMBER 2024

## Introduction

### Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is an overview of maintaining medical clinics and providers in Agency Administration in WINNIE, the MN WIC Information System.

### Date 1

All dates in this module are based on today's date being September 17, 2024.

### <Transition Slide>

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

## Overview

### Overview 1

In this module, we will review how to maintain our agency's Medical Clinics and Medical Providers.

Since the functionality is exactly the same, we are only going to review Medical Clinics and everything we review can then also be applied to Medical Providers.

Go ahead and return us to the Module Launcher page.

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

### Role 1

Maintenance of the medical clinics and providers 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.

Go ahead and click it.

<no audio> Click the Agency Administration button.

## Sidebar 1

Maintenance of the medical clinics and providers is found in two places: Community Resources and Agency under Settings.

Let's start with Agency. Select that from the sidebar.

<no audio> Select Agency from the sidebar.

## 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.

## Settings

### Settings 1

In the Agency Preferences card, we can toggle on Required Medical Clinic and/or Required Medical Provider if our agency wants to ensure this information is always collected.

When toggled on, if a selection hasn't yet been made, the field will always be required when a change is made to Demographics.

As best practice, if required, we should provide an Unknown option for instances whereby we don't have access to that information and a Demographics change needs to be made.

### Settings 2

Any change to the current settings will enable the Save button.

## Sidebar 2

We make changes to our agency's Medical Clinic and Medical Provider lists by opening the page under Community Resources.

Go ahead and select Medical Clinics from the sidebar.

## Results Grid

### Results 1

The Medical Clinics page opens and auto-populates with a list of all existing medical clinics already defined for the agency we are currently working in.

### Results 2

The Results grid has only 3 columns.

The ID, a system-assigned statewide unique number, the name we give the clinic, and the Active toggle, which indicates whether the clinic will display in the Medical Clinic dropdown.

### Sort Order 1

Like other grids, we can change the sort order by clicking on the header.

Go ahead and click on the Clinic Name header.

<no audio> Click the Clinic Name header to change the sort order.

## Add

### Add 1

We can add new Medical Clinics to the dropdown.

Go ahead and click the Add button.

### Cancel 1

The Cancel button becomes enabled only when we add or edit and allows us to undo any changes before we save them.

Go ahead and click it.

<no audio> Click the Cancel button.

### Cancel 2

It returns us to the unchanged grid.

OK. Click Add again.

<no audio> Click the Add button.

## Add 2

The ID field is disabled because the system assigns it.

The Clinic Name has a max of 50 characters and allows apostrophes, commas, periods, and hyphens.

Unlike the clinics previously added in the Legacy system, WINNIE does not force uppercase.

If we want our clinics to display in a consistent format, such as all caps, we will need to type it using all caps.

Our agency may also have its own format, like this one, and we should follow that as well.

Lastly, Active is automatically toggled on.

Let's add a new clinic called ALWAYS HEALTHY CLINIC using only capital letters.

<no audio> Type ALWAYS HEALTHY CLINIC in all capitals in the Clinic Name field.

## Add 3

We click the Update button to save our new clinic.

Go ahead.

## Edit

### Edit 1

We can also edit any existing clinics.

For instance, we're going to add the location, Duluth, to the Better Health Clinic.

### Edit 2

To edit, as usual, we can select the row then click the Edit button or double-click the row.

### Edit 3

Double-click the Better Health Clinic row.

### Edit 4

When we edit, we can revise the name or toggle off Active so that the clinic no longer displays in the Medical Clinics dropdown on the Demographics page.

Go ahead and type two hyphens then DULUTH in all caps.

## Edit 5

And save the change.

<audio – hint> Click the Update button.

## Active

### Active 1

Next, let's make the ALWAYS BETTER HEALTH CLINIC inactive.

Go ahead. Double-click instead of using the button.

<no audio> Make the ALWAYS BETTER HEALTH CLINIC inactive. Double-click (don't use the button).

### Active 2

<no audio> Make the ALWAYS BETTER HEALTH CLINIC inactive.

<audio – hint> Toggle off Active.

### Active 3

<no audio> Make the ALWAYS BETTER HEALTH CLINIC inactive.

<audio – hint> Click the Update button.

## Demographics

### <Transition Slide>

Let's take a look at our changes, which we can see immediately in Demographics.

<no audio> Slide transitions to Cammie Mille-Tea's Demographics page.

### List 1

We added the location to Cammie's previously selected clinic and if we click the dropdown...

<no audio> Click the Medical Clinic dropdown.

### List 2

...we can see that the inactive ALWAYS BETTER HEALTH CLINIC is no longer in our list.

A couple of things to note.

If we make a clinic inactive that had previously been selected for a participant, the field will clear and be blank.

### List 3

Notice at the top of the list is No Selection.

This is not the same as adding an unknown option since it is the same as being blank.

### List 4

Lastly, here's a tip.

By adding the 1 hyphen to Unknown, it is at the top of our list, making it easy to select without having to scroll.

Let's return to Medical Clinics in Agency Admin. Go ahead. Click anywhere for a hint.

<no audio> Return to Medical Clinics. Click anywhere for a hint.

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

### Return to Med Clinics 1

<no audio> Return to Medical Clinics. Click anywhere for a hint.

<audio – hint> Click the Agency Administration button.

### Return to Med Clinics 2

<no audio> Return to Medical Clinics. Click anywhere for a hint.

<audio – hint> Select Medical Clinics from the sidebar.

## Filter

### Filter 1

The Medical Clinics card lets us filter the Results list by the Active column.

Click the Status dropdown.

### Filter 2

The default is All, or we can filter by Active or Inactive.

Select Inactive then click the Search button.

## Filter 3

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

## Delete

### Delete 1

We can delete active or inactive medical clinics as long as they aren't associated with any other record in WINNIE.

Let's try to delete St. Luke's Pediatric Associates.

Select the row then click the Delete button.

<no audio> Select ST. LUKE'S PEDIATRIC ASSOCIATES then click the Delete button.

### Delete 2

<no audio> Select ST. LUKE'S PEDIATRIC ASSOCIATES then click the Delete button.

### Delete 3

As always, a confirmation message displays asking if we are sure.

Go ahead and click Yes.

### Delete 4

If we can't delete it, another message displays informing us that the record is in use.

Click the OK button.

## End Slide 1

That's all there is to maintaining medical clinics and again, everything we just reviewed can be exactly applied to maintaining our medical providers.

Click the button to continue.

## Knowledge Test

### True/False Q#1

True or false?

When we toggle on Required Medical Clinic and/or Required Medical Provider, we are indicating that they should be required when completing certifications.

## Answer #1

The answer is False.

When Required Medical Clinic and/or Required Medical Provider are toggled on, if a selection hasn't been made in the field, we are indicating that we should be required to complete it in order to save any change made to Demographics, regardless of whether we are working in the Participant Folder or completing a certification.

## 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](mailto:health.wic@state.mn.us), [www.health.state.mn.us](http://www.health.state.mn.us); to obtain this information in a different format, call: 1-800-657-3942.*

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