

Calendar 1B – Appointment Types – WINNIE Online Training Module

MAY 2023

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is a continued overview of Calendar Appointment Types.

Date

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

Edit Appt 1

We'll start with editing existing appointments.

We can modify existing appointments by either selecting the row and clicking Edit or double-clicking the row.

Let's double-click the Individual Nutrition Education/Check Pickup row.

Edit Appt 2

The same Appointment Type modal opens already populated.

Since Check Pickup seems outdated with eWIC, let's change it to Nutrition Visit.

Click three times on the text to select it.

WIC STAFF: Check Pickup? That's outdated. We should change that to "Nutrition Visit."

Edit Appt 2A

<no audio> Click three times on the text to select it.

Edit Appt 2B

<no audio> Click three times on the text to select it.

Edit Appt 3

Type Nutrition Visit and click into the Short Description field or press the Tab key.

Edit Appt 4

Type Nut Visit.

WIC STAFF: “Nut visit...” Guess that works.

Add Color 1

We are going to add a color so we can, at a glance, see how many of these appointments we have in a day.

Click the dropdown.

Add Color 2

Yellow is a very safe color. Click inside the circle.

<no audio> Click in the middle of the black circle.

WIC STAFF: Yellow is always good.

Add Color 3

This color looks good but let’s choose a slightly deeper shade. Click inside the circle.

<no audio> Click in the middle of the black circle.

WIC STAFF: Hmm. OK. But maybe a little darker?

Add Color 4

Click the Apply button.

Edit Appt 5

Lastly, at our busiest clinic, the Washington Co Government Center, we are going to change the Duration to 10 minutes instead of 15.

Let’s double-click that row in the grid.

<no audio> Double-click the WASHINGTON CO GOVERNMENT CENTER row in the grid.

WIC STAFF: The Washington clinic is always so busy...should probably change the duration to 10 minutes instead of 15...

Edit Appt 6

Double-click inside the Duration field to highlight the current value.

Edit Appt 7

Type: 10

Edit Appt Note

This change will not impact existing appointments since this is the default value that displays when the appointment is scheduled.

Once the duration is saved to the database for a scheduled appointment, we must make changes to the appointment itself to change the length of it.

What are the next steps to save our changes?

Go ahead. Click anywhere for a hint.

<audio – hint> Click the Update button since we made changes to the grid.

Edit Appt 8

<audio – hint> Click the Save button.

Waiting

<screen description – no audio> Spin icon displays.

Edit Appt 9

We will see these changes either immediately when scheduling appointments or once we've refreshed the browser.

Next, let's deactivate the SUBSEQUENT CERTIFICATION since we also have Recertification.

Double-click the SUBSEQUENT CERTIFICATION row.

Deactivate 1

We can deactivate an appointment even if it is in use.

It will not impact existing appointments.

This only causes it to no longer display as an option when scheduling new appointments.

Go ahead and toggle off Active and Save our change.

Deactivate 2

<no audio> Click the Save button.

Waiting

<screen description – no audio> Spin icon displays.

Delete 1

We can only delete appointments that aren't currently in use, which is why we didn't delete the Subsequent Cert.

If we had tried, go ahead, and click the Subsequent Cert row...

Delete 2

...and click the Delete button...

Delete 3

...a message displays indicating it cannot be deleted.

Click OK on the message.

<screen description – no audio> Message displays that reads "This record is in use and cannot be deleted."

Delete 4

However, now that the Subsequent Cert has been deactivated and can no longer be selected as an appointment type, we will be able delete it sometime in the future when it is no longer associated with any participant records.

We can delete PHONE Pregnant, which we've decided not to use.

Go ahead and delete it. Click anywhere for a hint.

<audio – hint> Click the PHONE Pregnant row to highlight it.

WIC STAFF: We aren't going to use PHONE Pregnant so let's delete it.

Delete 5

<audio – hint> Click the Delete button.

Delete 6

<audio – hint> Click the Yes button.

<screen description – no audio> Confirm message displays that reads: Are you sure you want to delete the selected record?

Waiting

<screen description – no audio> Small spin icon displays.

Grid Headers 1

One last thing to mention about the grid.

The little up arrow in the Description header indicates the grid is sorted in ascending order, A to Z, by Description.

Clicking any of the headers will change the sort order of that column.

Click the Description header.

Return to Scheduler 1

It's now in descending, or Z to A, order.

Now that we've made our changes, let's return to the clinic module and verify them.

Go ahead. Click anywhere for a hint.

<audio – hint> Click the Toggle Applications icon, or Agency Administration on the blue header, to return to the Module Launcher.

WIC STAFF: Alright. Let's see these changes in action. Back to the clinic module.

Return to Scheduler 2

<audio – hint> Click the Clinic Services module.

Search 1

We are going to search for household 1000079. Go ahead. Click anywhere for a hint.

<audio – hint> Click inside the Household ID field.

Search 2

<audio – hint> Ensure the Household ID is correct: 1000079 and press the Enter key or click the Search button.

Search 3

Click the Open Scheduler icon on the participant card.

Waiting

<screen description – no audio> Spin icon displays.

Verify 1

Let's start with our appointment type changes.

If we remember back to the beginning of this module...

<screen description – no audio> Slide transitions to same page with the Appointment Type dropdown expanded.

Verify 2

...we were going to add an appointment, edit the Individual Nutrition Ed, deactivate the Subsequent Cert and delete the PHONE Pregnant, which we did.

So, let's see how it impacted our Appointment Type options.

<screen description – no audio> Slide transitions to same page with the Appointment Type dropdown no longer expanded.

Verify 3

Click the Appointment Type dropdown.

Verify 4

We added the Hemoglobin Check, edited what is now the Nutrition Visit, and deactivated and deleted the Subsequent cert and PHONE Pregnant, respectively, and they no longer display.

Let's select Nutrition Visit.

Verify 5

We also changed the default duration for the Nutrition Visit to 10 minutes for Clinic 166.

Let's look at the TeleWIC Clinic.

Click the Clinic dropdown.

Verify 6

Select TeleWIC Appointment.

Waiting

<screen description – no audio> Spin icon displays.

Verify 7

Our default duration for the Nutrition Visit at other clinics remains at 15.

And clicking the Appointment Type dropdown...

Verify 8

...we can see that Hemoglobin check is not an option.

Let's return to clinic 166. Go ahead.

<audio – hint> Click the Clinic dropdown.

Verify 9

<audio – hint> Select Clinic 166.

Waiting

<screen description – no audio> Spin icon displays.

Verify 10

A few other things...

We deactivated the Subsequent Cert but may remember from before that Ford was scheduled for one.

Let's click on his appointment to verify it still displays correctly.

Verify 11

Yep. Good to go.

Click somewhere outside of the modal to close it.

Waiting

<screen description – no audio> Spin icon displays.

Verify Color 1

We assigned the color yellow to the Nutrition Visit so we can see at-a-glance that the Horse Household has at least one Nutrition Visit as evidenced by the partial yellow outline around the appointment.

Since both Wiley and Brock's appointments are yellow, we can assume they are also Nutrition Visits.

Click on Wiley Charmer's appointment to verify.

Verify Color 2

Yep. Nutrition Visit and still 15 minutes long.

Click somewhere outside of the modal to close it.

Waiting

<screen description – no audio> Spin icon displays.

Verify Color 3

The color legend is at the bottom of our Scheduler page.

Click below the outer scroll bar.

Verify Color 4

All appointments that are currently scheduled during the Calendar's time period, in this case on May 3, are listed along with any assigned colors.

Notice the yellow for our Nutrition Visit.

Default Colors

As we briefly noted before, existing appointments will default to gray while Household appointments and appointment types newly created in WINNIE, and not assigned a color, will display in white.

If we want any new appointments we add to display gray like existing, as mentioned earlier, we can enter the HEX value of c8c8c8.

End Slide

This concludes our review of Calendar Appointment Types.

Click the button to continue.

Test Your Knowledge

Multiple Choice Q#1 (single answer)

Multiple Choice – select the correct answer.

Which statement is true about Appointment Types?

- A. We can deactivate appointment types for certain clinics.
- B. We should add color to every appointment type so that we can tell, at-a-glance, what appointments we have.
- C. All of our existing appointment types can be edited and/or deactivated.
- D. Appointment types can never be deleted once they've been associated with a participant record.
- E. All we have to do to start sending automated appointment reminder emails is collect participant emails, toggle on the Reminder Flag, and enter a Reminder Interval.

Answer #1

The answer is C.

All of our existing appointment types can be edited and/or deactivated.

Explanations for other answers:

A – appointment types, when deactivated, no longer display for any clinics. We can choose which clinics they display for by toggling on/off Include.

B – Color should be used sparingly to easily identify certain appointment types since assigning many colors has been shown to slow Scheduler processing and display.

D – Appointment types can be deleted once they are no longer associated with a participant record.

E – Agencies must email the State Office's MIS & Data Unit with an agency email (generic or for an individual), which needs to be entered into the back end of WINNIE before the system can start sending automated appointment reminders.

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.

CALENDAR 1B – APPOINTMENT TYPES

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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