Calendar 4E – Copy to Clinic – 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 an overview of copy to clinic in Calendar in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being May 24, 2023.

Copy to Clinic

<Transition Slide>

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

Calendar 166A

We've completed our June calendar for Clinic 166.

Click the button to continue.

Grid 1

Our June grid for Clinic 167 has some of the same resource schedules as Clinic 166.

CPA 1 is the same except for June 23rd.

So, we are going to copy CPA 1's schedules to Clinic 167.

Click the button to continue.

Calendar 166B

We are going to copy the whole month and might as well start with June first.

Go ahead and get us started. Click anywhere for a hint.

<audio – hint> Click the CPA 1 row on June 1.

Copy Clinic 1

<audio – hint> Click the Copy button.

Copy Clinic 2

Since we are copying all of June, let's select the 30th from dropdown calendar for the To Date.

<no audio> Click the calendar control in the To Date.

Copy Clinic 3

<no audio> Use the calendar control in the To Date field to select June 30.

Copy Clinic 4

Since we are copying to another clinic so we have to select that from the Copy Schedule To dropdown.

Click the dropdown and select Another Clinic.

<no audio> Click the Copy Schedule To dropdown and select Another clinic.

Copy Clinic 5

<no audio> Click the Copy Schedule To dropdown and select Another clinic.

Copy Clinic 6

Next, click the Apply Schedule To dropdown.

Copy Clinic 7

Just like resources, we can select more than one clinic if we wanted.

Select Clinic 167 – Cottage Grove then click Save & Close.

Copy Clinic 8

<no audio> Select Clinic 167 – Cottage Grove then click Save & Close.

Waiting

<screen description – no audio> Spin icon displays.

Calendar 166C

We are still viewing the calendar for Clinic 166.

In order to look at the calendar for Clinic 167, we need to select it from the Resource Schedules panel.

Click to re-expand that panel.

<no audio> Click to re-expand the Resource Schedules panel.

Resource Panel 1

How do we view the calendar for clinic 167 – Cottage Grove? Go ahead. Click anywhere for a hint.

<no audio> View the calendar for clinic 167 - Cottage Grove. Click anywhere for a hint.

<audio – hint> Click the Clinic dropdown.

Resource Panel 2

<no audio> View the calendar for clinic 167 - Cottage Grove. Click anywhere for a hint.

<audio – hint> Select 167 – Cottage Grove Service Center.

Resource Panel 3

<no audio> View the calendar for clinic 167 - Cottage Grove. Click anywhere for a hint.

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

Calendar 167A

We have one discrepancy.

We need to remove the CPA 1 schedule from the 4th Friday.

Go ahead and do that. Click anywhere for a hint.

<no audio> Delete the CPA 1 schedule from the 4th Friday. Click anywhere for a hint.

<audio – hint> Click the CPA 1 row on June 23rd.

Delete 1

<audio – hint> Since we are deleting a specific schedule, we click the Delete Selected button.

Delete 2

<audio – hint> Click the Yes button.

Calendar 167B

Click the button to continue.

Grid 2

Let's continue creating our June calendar for clinic 167.

We have two matching schedules for CPA 1 and CPA 2, occurring on the 2nd and 4th Wednesdays from 11AM to 7PM with a 2-3 PM block.

Click the button to continue

Calendar 167C

What do we need to do to be able to create new resource schedules? Go ahead. Click anywhere for a hint.

<audio – hint> We need to re-expand the Resources Schedules panel. Click the plus sign icon to the far right of the Resource Schedules header.

Resource Panel 4

We are creating schedules for CPA 1 and CPA 2.

Select them from the Resources dropdown.

<no audio> Select CPA 1 then CPA 2 from the Resource dropdown.

Resource Panel 5

<no audio> Select CPA 1 then CPA 2 from the Resource dropdown.

Resource Panel 6

We are going to specify our dates of our resource schedules using the WIC weeks and days.

That means we can be general when specifying our From and To Dates.

Let's use the calendar controls to select the first and last date in June.

<no audio> Using the calendar controls, select June 1 then June 30 for the From Date and To Date.

Resource Panel 7

<no audio> Using the calendar controls, select June 1 then June 30 for the From Date and To Date.

Resource Panel 8

Add the resource schedules for the 2nd and 4th Wednesday from 11 to 7.

<no audio> Toggle on Wednesday, select the 2nd and 4th week, type 11:00 AM and 7:00 PM for the Start and End Times.

Resource Panel 9-11

<no audio> Toggle on Wednesday, select the 2nd and 4th week, click into the Start Time and type 11:00 AM, click or tab into the End Time, type 7:00 PM, and click Save.

Waiting

<screen description – no audio> Spin icon displays.

Collapse 1

We have to add our blocks to the calendar. Collapse the Resource Schedule panel.

Calendar 167D

Let's add our 2-3 PM block to CPA 1 on June 14th. Go ahead. Click anywhere for a hint.

<audio – hint> Click the CPA 1 row on June 14th.

Block 1

<audio – hint> Click the Block button.

Block 2

Now that were in the Block modal, we actually want to add the block to both Wednesday schedules.

Click the calendar control in the To Date field.

Block 3

We could select either the 28th or 30th as our To Date.

Let's be consistent and select the 30th.

Block 4

Finish the block.

Toggle on Wednesday, select the 2nd and 4th week, **type** 2:00 PM for the Start Time, **select** 3:00 PM from the dropdown for the End Time, and click Save.

Block 5-6

<no audio> Toggle on Wednesday, select the 2nd and 4th week, **type** 2:00 PM for the Start Time, **select** 3:00 PM from the dropdown for the End Time, and click Save.

Block 7

How do we add the same block for CPA 2? Save and close the modal when done. Go ahead. Click anywhere for a hint.

<audio – hint> Click the Resource dropdown.

Block 8

<audio – hint> Select CPA 2.

Block 9

<audio – hint> Click the Save & Close button.

Waiting

<screen description – no audio> Spin icon displays.

Calendar 167E

Click the button to continue.

Grid 3

Click the button to continue.

Calendar 167F

We have one more resource schedule that is the same as CPA 1 and 2 on the second Wednesday.

Copy Resource 1

Add the RD schedule by copying CPA 1 on June 14th. Go ahead. Click anywhere for a hint.

<audio – hint> Click the light blue CPA 1 row on June 14th.

<no audio> Add the RD schedule by copying CPA 1 on June 14th. Go ahead. Click anywhere for a hint.

<audio – hint> Click the Copy button.

Copy Resource 2

Use only the dropdowns.

<no audio> Add the RD schedule by copying CPA 1 on June 14th. Go ahead. Click anywhere for a hint.

<audio – hint> Click the calendar control in the To Date field.

Copy Resource 3

<no audio> Add the RD schedule by copying CPA 1 on June 14th. Go ahead. Click anywhere for a hint.

<audio – hint> Select the 14th since we are only copying that date.

Copy Resource 4

<no audio> Add the RD schedule by copying CPA 1 on June 14th. Go ahead. Click anywhere for a hint.

<audio – hint> Click the Apply Schedule To dropdown.

Copy Resource 5

<no audio> Add the RD schedule by copying CPA 1 on June 14th. Go ahead. Click anywhere for a hint.

<audio – hint> Select RD.

Copy Resource 6

<no audio> Add the RD schedule by copying CPA 1 on June 14th. Go ahead. Click anywhere for a hint.

<audio – hint> Click the Save & Close button since we are done copying this schedule.

Waiting

<screen description – no audio> Spin icon displays.

Calendar

In the next module, we will review how to use the Overwrite function to replace existing resource schedules.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

We can use the copy function to copy the entire clinic schedule to another clinic all at once.

Answer #1

The answer is False.

The copy function **duplicates a resource's schedule** at one clinic to another clinic, but it cannot be used to copy the entire clinic's schedule to another clinic all at once.

However, we could copy all the resource schedules to duplicate a clinic calendar for another clinic.

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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