

Referrals – WINNIE Online Training Module

JUNE 2024

Introduction

Intro

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

Date 1

All dates in this module are based on today's date being June 10, 2024.

<Transition Slide>

<screen description – no audio> Slide transitions to the Referrals page in Malin Gherrs' participant folder.

Referrals Page Overview

Page Overview 1

Referrals are an important part of WIC services, and we are required by policy to provide referrals, when appropriate, as part of our assessment and education.

We are starting on the Referrals page in Malin Gherrs' participant folder.

She is here for a Nutrition Ed visit while her mom, Lynn, and her infant brother, Finn, are here for certifications.

Page Overview 2

Like most pages in WINNIE, referral contacts display on the left and the contact contents in the panel on the right.

We click the date to view previous contacts.

Click the 4/6 contact.

Page Overview 3

The 4/6 contact date displays above the list of referrals provided.

REFERRALS

The Created Date is the date the referrals were saved and is usually the same as the Contact Date.

Again, like other pages in the Participant Folder, the Add button is enabled when the participant is in a current certification period, which Malin is.

<Transition Slide>

<screen description – no audio> Slide transitions to Lynn Gherr's Referrals page in Certification Mode.

We're going to come back to Malin's folder.

First, we'll take a closer look at Referrals while certifying Lynn.

Referrals & Certification Mode

Cert Mode 1

We've completed most of her certification and are going to add the referrals we provided during our conversation with her.

We can enter referrals at any time during the cert; we don't have to complete anything before entering them, but they tend to be part of the latter part of our conversation so are further down the Cert Mode list.

Cert Mode 2

WINNIE does not require referrals to complete the certification, so if we don't provide any, we don't have to document anything.

But we've provided referrals to childcare, housing assistance, and a peer referral and want to document these.

Go ahead and click the Add button.

Contact Date

Contact Date 1

The Contact Date defaults to today.

We can change it to any day in the past as long as it is within the current cert period, which means if we click the calendar control icon...

<no audio> Click the Calendar Control icon in the Contact Date field.

Contact Date 2

...when certifying today is the only date we can choose.

Click the date field to close the calendar.

Contact Date 3

If we try to type a date before today...let's do that...click three times in the date field...

Contact Date 4

<no audio> If we try to type a date before today...

<no audio> Click three times in the date field.

Contact Date 5

...and type: 6/5/24 then tab or click somewhere on the page...

<no audio> If we try to type a date before today...

<no audio> Type 6/4/24 then press the Tab key or click somewhere on the page.

Contact Date 6

<no audio> If we try to type a date before today...

<no audio> Type 6/4/24 then press the Tab key or click somewhere on the page.

Created Date 1

...a validation message informs us that the date cannot be less than their cert start date.

Notice that our Created Date remains the same.

This is the date the referrals record was saved to the database and will always be today's date regardless of the Contact Date.

Go ahead and re-select today's date from the calendar.

Contact Date 7

<no audio> Re-select today's date from the calendar.

Add Referrals 1

To select our referrals, we click the Modify button. Go ahead.

<no audio> Click the Modify button.

Referral Topics

Referral Topics 1

There are two dropdowns we select from.

Everything in these two dropdowns will vary agency-to-agency because they are managed by, and specific to, our agency.

Selecting from Referral Topics populates the Referrals list because our agency's referrals are organized into general categories, or Referral Topics.

Click the Referral Topics dropdown.

Referral Topics 2

The topics should be pretty comprehensive and encompass most health, nutrition, medical, and assistance services.

Click below the scroll bar to view all available in this agency.

Referral Topics 3

All of the referrals we gave to Lynn are found under topics in the first part of this list, so go ahead and click above the scroll bar.

<no audio> We've provided a referral for childcare, a couple for housing assistance, and a peer referral and want to document these.

Referral Topics 4

Let's start with Child Care. Select that.

<no audio> Select Child Care from the Referral Topics list.

Referrals

Referrals 1

Once a topic is selected, the Referrals dropdown enables.

Click the Referrals dropdown.

Referrals 2

Our agency has only one option.

Click on it or press the Enter key.

Referrals 3

We've seen this kind of list a couple of times and we'll see it again.

Quick reminder, we can delete the referral by clicking the X next to it or we can delete everything by clicking the x to the far right.

Referrals 4

To move our selection to the Referral List grid, we have to click the Update List button.

Go ahead and do that.

Delete Referral

Delete Icon 1

We can remove anything we add to the Referral List by clicking the garbage can icon in its row.

Go ahead and do that.

<no audio> Click the Delete icon.

Delete Icon 2

Notice that there wasn't a confirmation message; it just removed it from the list and the Referrals field.

OK. Go ahead and reselect our childcare referral.

<audio – hint> Click the Referrals dropdown.

Delete Icon 3

<no audio> Re-select the Child Care referral.

<audio – hint> Click to select or press the Enter key.

Delete Icon 4

<no audio> Re-select the Child Care referral.

<audio – hint> Click the Update List button.

Add Referrals

Add Referrals 1

Next, we are going to add two Energy/Housing Assistance referrals: Community Action Partnership-Minneapolis and also Minneapolis Public Housing Authority.

Go ahead. Click anywhere for a hint.

<audio – hint> Click the Referral Topics dropdown.

Add Referrals 2

Text Repeats on Add Referral Slides 2 – 76: <no audio> Add two Energy/Housing Assistance referrals: Community Action Partnership-Minneapolis and also Minneapolis Public Housing Authority. Click anywhere for a hint.

<audio – hint> Select Energy/Household Assistance.

Add Referrals 3

<audio – hint> Click the Referrals dropdown.

Add Referrals 4

<audio – hint> Select Community Action Partnership-Minneapolis.

Add Referrals 5

<audio – hint> Click inside the Referrals dropdown again.

Add Referrals 6

<audio – hint> Select Minneapolis Public Housing Authority.

Add Referrals 7

<audio – hint> Click the Update List button.

Referrals & Hot Keys

Referral Hot Key 1

We have one last referral, which Lynn accepted, to a breastfeeding peer.

Click the Referral Topics dropdown.

Referral Hot Key 2

Let's use a hot key to make our selections.

Type the letter B for Breastfeeding Resources then press the Enter key to select it.

Referral Hot Key 3

<no audio> Type the letter B for Breastfeeding Resources then press the Enter key to select it.

Referral Hot Key 4

Click the Referrals dropdown.

Referral Hot Key 5

Since our "accepted" option is auto-highlighted, we just have to press the Enter key.

Add Referrals 8

Last step? Go ahead.

<audio – hint> Click the Update List button.

Sort Order

Sort Order 1

Notice our last referral is listed first.

The sort order is currently by Referral Topics in ascending order as indicated by the tiny 1 and up arrow in the header.

Like other grids in WINNIE, we can change the order by clicking the headers.

To finish working in the modal, we click the OK button.

<no audio> Click the OK button.

Save Referrals 1

To save our referrals, we have to click the Save button. Do that.

Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Add Button

Add Button 1

We get a checkmark when we save the referrals.

Notice that although we've added a record for today, the Add button is still enabled, which doesn't make a lot of sense in Cert Mode because we can only add one record with today as a contact date and we now know we can't add anything before today's date.

However, in MCA Mode and the Participant Folder, we would be able to add multiple referral records with different contact dates (similar to how measurements and bloodwork work).

Edit & Delete

Edit/Delete 1

Like other pages in WINNIE, the Modify and Delete buttons are only enabled on the date the referral contact is created regardless of whether it was created in the Participant Folder or while in Certification or Mid-Certification Assessment (MCA) Mode.

This Delete button removes everything in the grid.

In general, we probably won't use this Delete icon.

As we saw before, we have to Modify...click the button...

<no audio> Click the Modify button.

Edit/Delete 2

...to edit or delete individual referrals.

Go ahead and click the Cancel button.

Copy Referrals

Copy 1

We have one more thing to look at: Copy Referrals.

This button allows us to copy referrals to other household members on the same date the referrals were added.

One caveat.

If the referrals are added during a certification, this button only becomes enabled for other members once the certification has been completed for that member.

This does not hold true if referrals are added during an MCA. The MCA does not need to be completed to copy.

<Transition Slide>

<screen description – no audio> Slide transitions to Finn’s Referral page in Certification Mode. We’ve completed Lynn’s certification and are now adding Referrals for Finn.

Copy 2

Click the Add button.

Copy 3

The Copy Referrals button is enabled because we completed Lynn’s cert.

Go ahead and click it.

<no audio> Click the Copy Referrals button.

Copy 4

The Copy Referrals modal opens listing each referral we added for Lynn.

We actually want to copy all of these which is the default.

Click the Copy button.

Modify Referrals

Modify 1

We also want to add a referral to Immunizations – Baby Tracks.

Go ahead and do that.

Don’t use hot keys. Click anywhere for a hint.

Displays on Modify 2 – 7 slides <no audio>: Add a referral to Immunizations – Baby Tracks. Don’t use hot keys. Click anywhere for a hint.

<audio – hint> Click the Modify button.

Modify 2

<audio – hint> Click the Referral Topics dropdown.

Modify 3

<audio – hint> Select Immunizations.

Modify 4

<audio – hint> Click the Referrals dropdown.

Modify 5

<audio – hint> Select Baby Tracks.

Modify 6

<audio – hint> Click the Update List button.

Modify 7

<audio – hint> Click the OK button.

Modify 8

Go ahead and save the referrals.

<no audio> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

<Transition Slide>

<screen description – no audio> Green “Changes saved” banner displays and checkmark next to Referrals. Slide transitions to Malin’s Referrals page in her Participant Folder.

As promised, we are returning to Malin’s folder after having completed Finn’s cert.

Put It All Together in the Folder

Ppt Folder 1

As part of our Nutrition Education conversation today, we have provided mom with a referral for Malin as well, which we want to document.

Since some of the referrals we provided to Lynn and Finn apply to Malin as well, we want to copy a few of their referrals first.

Get us started. Click anywhere for a hint.

<audio – hint> Select Referrals from the sidebar.

Ppt Folder 2

<no audio> We want to copy a few of the referrals we provided to Lynn and Finn. Get us started. Click anywhere for a hint.

<audio hint> Click the Add button.

Ppt Folder 3

<no audio> We want to copy a few of the referrals we provided to Lynn and Finn. Get us started. Click anywhere for a hint.

<audio hint> Click the Copy Referrals button.

Ppt Folder 4

We want to remove a couple of these that were specific to Lynn and Finn.

To do that, we toggle them off.

Toggle off Breastfeeding Resources.

Ppt Folder 5

When we do that, the Copy toggle automatically toggles off as well since it selects all or de-selects all.

From here, we are going to toggle off Immunizations then add a referral to Dental Health.

Go ahead and do that. Don't use hot keys. Click anywhere for a hint.

<no audio> Toggle off Immunizations then add a referral to Dental Health. Don't use hot keys. Click anywhere for a hint.

Ppt Folder 6

Displays on Ppt Folder Slides 6 - 14: <no audio> Toggle off Immunizations then add a referral to Dental Health. Don't use hot keys. Click anywhere for a hint.

<audio – hint> Click the Copy button.

Ppt Folder 7

<audio – hint> Click the Modify button.

Ppt Folder 8

<audio – hint> Click the Referral Topics dropdown.

Ppt Folder 9

<audio – hint> Select Dental Health.

Ppt Folder 10

<audio – hint> Click the Referrals dropdown.

Ppt Folder 11

Use the keyboard to select if you want.

<audio – hint> Select Children’s Dental Services or press the Enter key on the keyboard.

Ppt Folder 12

<audio – hint> Click the Update List button.

Ppt Folder 13

<audio – hint> Click the OK button.

Ppt Folder 14

<audio – hint> Click the Save button.

End Slide 1

That’s all there is to referrals.

This concludes our review of Referrals.

Click the button to continue.

Knowledge Test

True/False Q#1

True or false?

Referral Topics and Referrals will differ between agencies because both are managed at the agency-level.

Answer #1

The answer is True.

Both Referral Topics and Referrals are managed by Agency Admin staff for each agency. They should be specific to the referrals provided in each agency's area.

Multiple Choice Q#2

Which statement is true? The Copy Referrals button is disabled in the Participant Folder because...

- A. The referrals were added during Cert Mode and can't be copied in the Participant Folder.
- B. The referrals were added on a date other than today.
- C. The Certification is not complete for the member for whom the referrals were added.
- D. The MCA is not complete for the member for whom the referrals were added.
- E. Both B and C are true.

Answer #2

The answer is E.

The Copy Referrals button is only enabled on the same date the referral(s) are added and if added during a certification, does not become enabled for other members until the certification has been completed.

Corrections for other answers:

A – Referrals can be copied for other members if created in Cert Mode, MCA Mode or in the Participant Folder.

D – Referrals can be copied before an MCA has been completed if added while in MCA Mode.

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.

REFERRALS

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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