Scheduler 3B – Household Appointments - WINNIE Online Training Module

JULY 2023

Introduction

Intro

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

Date

All dates in this module are based on today's date being July 14, 2023.

<Transition Slide>

<screen description – no audio> Slide transitions from topic page to Search page.

Search 1

Let's continue our review of household appointments.

We just prescreened Riesling and are now scheduling a household appointment for the Wine family.

Go ahead and review the Details for Merlot and Brandy, then click on the Scheduler icon on Brandy's card.

<audio – hint> Click Merlot's participant card to view her Show Details.

WIC STAFF: OK. Riesling is prescreened. I need to check out Merlot and Brandy's details before scehduling this household appointment...

Search 2

<no audio> Review the Details for Merlot and Brandy, then click on the Scheduler icon on Brandy's card.

<audio – hint> Click Brandy's participant card to view her Show Details.

Search 3

<no audio> Review the Details for Merlot and Brandy, then click on the Scheduler icon on Brandy's card.

<audio – hint> Click the calendar (Scheduler) icon on Brandy's participant card.

Alert 1

Close the alert.

Scheduler 1

We are going to start by checking Tuesday, July 18th for appointments.

Go ahead and select it from the calendar dropdown.

<no audio> Select Tuesday, July 18th from the calendar dropdown.

WIC STAFF: We know we have openings next Tuesday…

Scheduler 2

<no audio> Select Tuesday, July 18th from the calendar dropdown.

<Waiting>

<screen description – no audio> Spin icon displays.

IC 1

Again, before going further, we are going to complete the Initial Contacts, which should always be considered when scheduling certification appointments.

Click the Initial Contact button.

IC 2

Brandy was terminated for failed to pick-up, but her cert doesn't actually end until August.

Since there isn't a gap between her pregnancy cert end date and when we are scheduling her postpartum certification, she doesn't need an Initial Contact.

Let's select Merlot from the participant menu.

IC 3

<no audio> Select Merlot from the participant menu.

IC 4

Merlot's cert ended in April. Since there's a gap in her certifications, we need to complete an Initial Contact.

Click the New Contact button.

IC 5

We're offering an appointment on July 18th. Select that date from the First Appointment Offered dropdown.

<no audio> Select July 18th from the First Appointment Offered dropdown.

WIC STAFF: Would Tuesday, July 18th, work for you?

IC 6

<no audio> Select July 18th from the First Appointment Offered dropdown.

IC 7

Click the Save button.

IC 8

Riesling was just prescreened, and the Initial Contact record was created because it's required to complete the Prescreen, but the First Appointment Offered wasn't entered because it was known at that time.

So, let's finish her Initial Contact.

Select Riesling from the Participant Menu.

IC 9

<no audio> Select Riesling from the Participant Menu.

IC 10

The date from Merlot's Initial Contact defaults so we can just click Save & Close.

Scheduler 3

Before we go any further, let's select our appointment information for Brandy in the Schedule Appointment panel.

We are recertifying her as a breastfeeding woman.

Select her Appointment Type.

<no audio> Select Recertification from the Appointment Type dropdown.

Scheduler 4

<no audio> Select Recertification from the Appointment Type dropdown.

Scheduler 5

Since Brandy's current WIC Category is pregnant, we want to change it to Breastfeeding to reflect her category at the time of her appointment.

Go ahead and do that.

<no audio> Select Breastfeeding from the WIC Category dropdown.

Scheduler 6

<no audio> Select Breastfeeding from the WIC Category dropdown.

Scheduler 7

If we are going to schedule at another clinic, as we mentioned previously, we must select it from the Clinic dropdown in the Schedule Appointment panel **before** scheduling the household appointment.

Let's select Cottage Grove.

<no audio> Select Cottage Grove from the Clinic dropdown.

Scheduler 8

<no audio> Select Cottage Grove from the Clinic dropdown.

<Waiting>

<screen description – no audio> Spin icon displays.

Scroll Bars 1

Let's make sure there are appointments available.

Click the outer and internal scroll bars to view the schedule.

<no audio> Click the outer scroll bar.

Scroll Bars 2

<no audio> Click the internal scroll bar.

Scroll Bars 3

<no audio> Click the internal scroll bar.

Scheduler 9

We have a 1:15 that'll work.

Go ahead and schedule the household appointment for 1:15. Click anywhere for a hint.

<audio – hint> Double-click the 1:15-1:30 row/slot.

Scheduler 10

<no audio> Schedule the household appointment for 1:15 PM.

<audio – hint> Click the Schedule for Household button.

HH Appt 1

When changes are made to the Appointment Scheduler panel, the Confirm Household Appointment modal retains the most recent changes made to the participant currently displaying in the Participant Menu and unlike when selecting for individual appointments, we can make changes to our selections.

Let's complete the modal.

Click Brandy's name in the header to collapse her card, select Recertification for Merlot, click her name, then select Initial Certification for Riesling.

HH Appt 2-6

<no audio> Click Brandy's name in the header to collapse her card, select Recertification for Merlot, click her name, then select Initial Certification for Riesling.

HH Appt 4 <audio – hint> Click on Wine, Merlot in the card header to collapse it.

HH Appt 7

Remember, we have an hour and a half open. Change Riesling's appointment to 30 minutes.

HH Appt 8

<no audio> Change Riesling's appointment to 30 minutes.

HH Appt 9

Click into the Comments field and we'll add a comment.

HH Appt 10

<no audio> Comment typed: Combined HH appt – shortened by 15 minutes.

HH Appt 11

Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Scheduler 11

Let's check out the Appointments page again.

<no audio> Open the Appointments page.

<Waiting>

<screen description – no audio> Spin icon displays.

Appts Page 2

Go ahead and expand the appointment rows, starting with the top row.

<no audio> Expand each appointment row, starting with Brandy, then Merlot, then Riesling.

<audio – hint> Click the down arrow to the left of Wine, Brandy to expand the row.

Appts Page 2

<no audio> Expand each appointment row, starting with Brandy, then Merlot, then Riesling.

<audio – hint> Click the down arrow to the left of Wine, Merlot to expand the row.

Appts Page 3

<no audio> Expand each appointment row, starting with Brandy, then Merlot, then Riesling.

<audio – hint> Click the down arrow to the left of Wine, Riesling to expand the row.

Appts Page 4

As we mentioned previously, comments added when creating household appointments are specific to the member for whom they're written.

Let's return to the Search page.

<Transition Slide>

<screen description – no audio> Slide transitions from topic page to Search page.

Search 4

Like everywhere else in WINNIE, in Show Details, household appointments will display the same time for all members.

Click on Merlot's participant card then Riesling's.

Search 5

<no audio> Click on Merlot's participant card then Riesling's.

Search 6

That's really all there is to scheduling Household appointments.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

If scheduling a household appointment at another clinic, we need to select it from the Schedule Appointment panel **before** double-clicking our appointment time in the calendar.

Answer #1

The answer is True.

When scheduling a household appointment, the Clinic is read-only in the Confirm Household Appointment modal. Like individual participant appointments, it must be selected in the Schedule Appointment panel **before** scheduling the appointment.

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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