Scheduler 4A – Appointment Details - 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 editing and rescheduling appointments in WINNIE, the MN WIC Information System.

Edit Appointments

Date

All dates in the Edit Appointments section of this module are based on today's date being July 11, 2023.

<Transition Slide>

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

Edit 1

Let's return to our Ning household.

While scheduling our appointments for the Ning family, it occurred to us that we may want to schedule Nutrition Visits for the boys as well for their October visit.

As we learned earlier, we can double-click the appointment on the calendar to open the modal that allows us to edit it.

Go ahead and do that.

<no audio> Double-click the appointment on the calendar to open the Household Appointment (edit) modal.

Edit 2

This opens the Household Appointment modal.

Notice that everything is editable, including the clinic.

Click below the scroll bar.

Edit 3

When we were scheduling appointments, household member's cards when they were toggled off and not included, were auto collapsed.

When editing, they are automatically re-expanded.

How do you think we add Harken back to our household appointment? Go ahead. Click anywhere for a hint.

<audio – hint> Toggle on Include in Harken's card.

Edit 4

We are going to schedule all three boys for Nutrition Visits.

Go ahead and finish editing the household appointment for Harken, Moe, and then Penn. Click anywhere for hints.

<audio – hint> Click the Appointment Type dropdown in Harken's card.

Edit 4A

<no audio> Finish editing the household appointment for Harken, Moe, and then Penn. Click anywhere for a hint.

<audio – hint> Select Nutrition Visit.

Edit 4B

<no audio> Finish editing the household appointment for Harken, Moe, and then Penn. Click anywhere for a hint.

<audio – hint> Toggle on Include in Moe's card.

Edit 4C

<no audio> Finish editing the household appointment for Harken, Moe, and then Penn. Click anywhere for a hint.

<audio – hint> Click the Appointment Type dropdown in Moe's card.

Edit 4D

<no audio> Finish editing the household appointment for Harken, Moe, and then Penn. Click anywhere for a hint.

<audio – hint> Select Nutrition Visit.

Edit 4E

<no audio> Finish editing the household appointment for Harken, Moe, and then Penn. Click anywhere for a hint.

<audio – hint> Toggle on Include in Penn's card.

Edit 4F

<no audio> Finish editing the household appointment for Harken, Moe, and then Penn. Click anywhere for a hint.

<audio – hint> Click the Appointment Type dropdown in Penn's card.

Edit 4G

<no audio> Finish editing the household appointment for Harken, Moe, and then Penn. Click anywhere for a hint.

<audio – hint> Select Nutrition Visit.

Edit 5

<no audio> Finish editing the household appointment for Harken, Moe, and then Penn. Click anywhere for a hint.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Refresh 1

Let's click the Refresh button to see if anything else has been scheduled.

<Waiting>

<screen description – no audio> Spin icon displays.

Edit Ind 1

Yep. Looks like it. Good to know.

Go ahead and re-expand the Schedule Appointment panel.

Edit Ind 2

We are currently in Penn's participant folder.

The calendar, and its appointments, functions independently from the folder we are currently working in.

Which means we can work with any appointment on the calendar regardless of whose folder we are currently in.

Go ahead and collapse the Schedule Appointment panel again.

Edit Ind 3

We are going to edit Will's appointment, moving it to 12:15 in the CPA 1 column.

Let's double-click on Will's individual appointment.

> PARTICIPANT: "Hi! I need a later appointment, like 12:15 or so, for Will Lowe on October 13."
>
> WIC STAFF: Sure. That's doable.

Edit Ind 4

The Appointment modal opens.

Again, everything is editable.

Click into the Time field.

Edit Ind 5

We can select from the dropdown or type our time.

If we type it, it must always be in the format hour, colon, minutes, space AM or PM (and it's not case-sensitive).

Let's type 12:15 PM.

Edit Ind 6

Now let's click into the Resource dropdown and select CPA 1.

Edit Ind 7

<no audio> Select CPA 1.

Edit Ind 8

We are going to add a comment about the time change. Click into the comment field.

Edit Ind 9

<screen description – no audio> Comment typed: Called for a later appt on 7/11. Scheduled at 12:15 instead of 11:00.

Edit Ind 10

Click Save.

<no audio> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

<Waiting>

<screen description – no audio> Spin icon displays.

<Transition Slide>

<screen description – no audio> Slide transitions from Will having a 12:15 appt in CPA 1 column back to Will having a 11:00 appt in the CPA 2 column.

Click-and-Drag

Remember, we could also have clicked-and-dragged Will's appointment to 12:15 in the CPA 1 column.

<Transition Slide>

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

Reschedule Appointments

Date

All dates in the Reschedule Appointments section of this module are based on today's date being July 18, 2023.

<Transition Slide>

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

Reschedule 1

Let's take a look at the Reschedule function.

The Power family has an appointment on July 20th at 8AM at the Washington County clinic and we are going to reschedule it at Cottage Grove.

> PARTICIPANT: "Hi! My family has an appointment on July 20th in Stillwater, but I'm wondering if we can go to Cottage Grove instead?"
>
> WIC STAFF: Let me take a look.

Reschedule 1A

We should note that functions found in the Appointment modal, such as Edit, Reschedule, Delete, etc. can also be completed in the Clinic Schedule, which we'll see in another training module.

However, if we are using the Reschedule function to move an appointment to **another clinic**, we must do that within the Scheduler.

We **cannot** use the Reschedule function in the Clinic Schedule to reschedule an appointment at another clinic.

Click the Scheduler icon on Justin's participant card.

<Waiting>

<screen description – no audio> Spin icon displays.

Reschedule 2

Go ahead and select the 20th from the calendar dropdown.

Reschedule 3

<no audio> Select the 20th from the calendar dropdown.

<Waiting>

<screen description – no audio> Spin icon displays.

Reschedule 4

The Power household appointment is from 8 to 10:15 AM.

Single-clicking an appointment will open the multi-functional Appointment Details modal.

Single-click the Power household appointment.

Reschedule 5

Go ahead and click the Reschedule button.

<Waiting>

<screen description – no audio> Spin icon displays.

Reschedule 6

Clicking the Reschedule button locks the Scheduler until the appointment is moved or we click the Cancel Reschedule button to exit the Reschedule mode.

The individual appointment components, such as participants, appointment types, durations, and categories are locked so that we can move the exact same appointment to another date, time, resource, and/or clinic.

To that end, the Schedule Appointment panel displays **only** the Clinic.

Reschedule 7

All appointments are disabled and if we hover over them, the tooltip indicates why.

Go ahead and hover over the two household appointments then click the button to continue.

Reschedule 8

We are rescheduling at the Cottage Grove clinic. Go ahead and select that from the dropdown.

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

Reschedule 9

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

<Waiting>

<screen description – no audio> Spin icon displays.

Reschedule 10

We're looking for 2 hours and 15 minutes. Click the scroll bars to view the rest of the day.

<no audio> Click below the outer scroll bar.

Reschedule 11

<no audio> Click below the internal scroll bar.

Reschedule 12

<no audio> Click below the internal scroll bar.

Reschedule 13

We can just about fit them at 1:15.

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

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

> WIC STAFF: Would 1:15 on July 20th at Cottage Grove work?
>
> Participant: "Thanks! That'll work great."

Reschedule 14

It's going to create an overbook since it overlaps the 3:15 appointment but we can fix that.

Go ahead and click Yes.

<no audio> Click the Yes button.

Reschedule 15

We do want to update the appointment. Click Yes.

<no audio> Click the Yes button.

Reschedule 16

Once the appointment is rescheduled, the page reverts to its usual mode with scheduling options once again available in the Schedule Appointment panel.

We could leave the Overbook, but let's modify the appointment instead.

Go ahead and decrease the Power infant's 45-minute Initial Cert to 30 minutes. Click anywhere for a hint.

<no audio> Decrease the Power infant's appointment to 30 minutes. Click anywhere for a hint.

<audio – hint> Double-click the Power Household appointment to go directly to the edit modal.

Edit Overbook 1

<no audio> Decrease the Power infant's appointment to 30 minutes. Click anywhere for a hint.

<audio – hint> Click the Durations dropdown in Power, Les' card.

Edit Overbook 2

<no audio> Decrease the Power infant's appointment to 30 minutes. Click anywhere for a hint.

<audio – hint> Select 30.

Edit Overbook 3

<no audio> Decrease the Power infant's appointment to 30 minutes. Click anywhere for a hint.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

<Waiting>

<screen description – no audio> Spin icon displays.

Reschedule 17

Let's return to the Washington Clinic, Clinic 166…go ahead. Click anywhere for a hint.

<audio – hint> Click the Clinic dropdown.

Reschedule 18

Returning to the Washington Clinic, 166…go ahead. Click anywhere for a hint.

<audio – hint> Select 166 - WASHINGTON CO GOVERNMENT CENTER.

<Waiting>

<screen description – no audio> Spin icon displays.

<Waiting>

<screen description – no audio> Spin icon displays.

Database

We can see that their previously scheduled appointment on July 20th at Clinic 166 has been automatically deleted as part of the reschedule.

The original appointment information when appointments are deleted, changed, or rescheduled is not maintained in the database.

The appointment record is updated, or overwritten, with the new information if changes are made, or erased from the database if the appointment has been deleted.

Click the button to continue.

Test Your Knowledge

Multiple Choice Q#1

Which statement is true?

   A. Double-clicking **any** appointments on the calendar automatically opens the Appointment modal where we can make edits.

   B. We can run an ad-hoc (Infoview) report listing all of the rescheduled appointments.

   C. Clicking the Reschedule button locks all appointments on the calendar.

   D. We can update individual participant information when rescheduling an appointment.

   E. We can only reschedule an appointment for the same resource.

Answer #1

The answer is C.

Clicking the Reschedule button locks all appointments on the calendar (hovering over each appointment displays a tooltip indicating this).

Explanations for other answers:

   A. Double-clicking **past** appointments does not open a modal (the statement said "any").

   B. There is no indicator in the database that an appointment has been rescheduled. The "old" appointment information is deleted and overwritten with the "new" appointment information.

   D. Individual participant information **cannot** be edited when rescheduling an appointment.

   E. We **can** reschedule an appointment for other dates, times, clinics, and resources.

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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