Scheduler 5A – Clinic Schedule - 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 the Clinic Schedule and how to filter appointments in the calendar in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being July 20, 2023.

<Transition Slide>

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

Search 1

The Clinic Schedule allows us to view and modify the appointment schedules for the clinic we are currently working in.

It can only be accessed from the Participant List sidebar, and not from within a Participant Folder.

Go ahead and click on Clinic Schedule on the sidebar.

<no audio> Click Clinic Schedule.

<Waiting>

<screen description – no audio> Spin icon displays.

Clinic 1

The Clinic Schedule opens to a calendar of the current date's appointments for the clinic we are working in.

Notice the Clinic dropdown is disabled in the Clinic Schedule.

If we were to want to view another clinic's appointment schedules, we would need to go back to the Search page and select that clinic first before opening the Clinic Schedule page.

Scheduler Panel 1

We saw the Scheduler panel previously when we first started reviewing the Scheduler.

This is the panel that is auto-collapsed when that page is opened because it functions as a filter, which may be useful when viewing the schedule but not really when scheduling appointments.

Go ahead and click on the Resource Groups dropdown.

Resource Groups 1

There is one option, General Staff. Go ahead and select it.

<no audio> Select General Staff from the Resource Groups dropdown.

Resource Groups 2

Notice that it filled the Resources field with all of our active staff, and not just those that are currently scheduled for today.

Resource Groups are not utilized any further by MN WIC because they have to be maintained at the state level and our appointment scheduling is maintained by our Local Agency, not the State Office.

Reset 1

The Reset button will put everything in the panel back to its default status.

Go ahead and click it.

<no audio> Click the Reset button.

<Waiting>

<screen description – no audio> Spin icon displays.

<Waiting>

<screen description – no audio> Spin icon displays.

Resources 1

The resources that are default listed are those that have resource columns or schedules for the day we are viewing.

We can view just one resource schedule by filtering on the Resources field.

Let's view only CPA 1's schedule.

WIC STAFF: I just want to see the CPA 1 schedule.

Resources 2

Go ahead and click the x next to Somali 1 and then the x next to CPA 2 to clear them from the Resources field.

Resources 3

<no audio> Click the x next to Somali 1 and then the x next to CPA 2 to clear them from the Resources field.

Resources 4

Click the Search button.

<Waiting>

<screen description – no audio> Spin icon displays.

Filters 1

Once we've filtered our calendar, the filters are retained until we reset them.

Select July 25th from the calendar dropdown.

Filters 2

<no audio> Select July 25th from the calendar dropdown.

<Waiting>

<screen description – no audio> Spin icon displays.

Filters 3

As we'll see in a minute, July 25th has more than just CPA 1 scheduled, but our filter was retained.

It's also maintained across views. Let's select Month view.

<Waiting>

<screen description – no audio> Spin icon displays.

Caveat

Only appointments for CPA 1 display.

One caveat with changing views, between identifying all the appointments then filtering, it can take a long time for this page to resolve.

That said, go ahead and select Week view.

Filters 4

Regardless of the view, we can also filter the calendar whether it's a Household or Participant appointment or Group Education class, whether an interpreter is needed, if a reminder contact has been made, if it includes a specific WIC Category, whether they came to the appointment, and if any of the missed appointments have been contacted.

The default is ALL so that all appointments display.

Go ahead and click each filter dropdown to see its options, moving left to right in the top row and then left to right in the bottom row.

<no audio> Click each filter dropdown, starting with Appointment Level, Needs Interpreter, and Confirmed then WIC Category, Kept, and Followed-up.

Filters 5

<no audio> Click each filter dropdown, starting with Appointment Level, Needs Interpreter, and Confirmed then WIC Category, Kept, and Followed-up.

Confirmed 1

For example, what if we wanted to see which appointments we still have to confirm for CPA 1 next week?

How do you think we do that? Go ahead. Click anywhere for a hint.

<audio – hint> Click the Confirmed dropdown.

WIC STAFF: I wonder which appointments still need a reminder call…?

Confirmed 2

<audio – hint> Select No. We want to see appointments that don't have a confirmation.

Confirmed 3

<audio – hint> Click the Search button.

<Waiting>

<screen description – no audio> Spin icon displays.

Confirmed 4

These are the participants and households for whom we still need to do a reminder call.

If we click on Ray Darr's appointment at 9:15…go ahead.

Confirmed 5

We can see he has yet to have a confirmation documented.

Go ahead and close the Appointment Details.

<no audio> Click the Close button.

<Waiting>

<screen description – no audio> Spin icon displays.

Reset 2

Let's click the Reset button while in Week view.

<Waiting>

<screen description – no audio> Spin icon displays.

<Waiting>

<screen description – no audio> Spin icon displays.

Reset 3

Resetting returns us to our default settings, including the Day we were viewing, the 25th, which actually has 3 columns, not just one.

We can also combine filters.

Select July 18th from the calendar dropdown.

Combine 1

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

\<Waiting\>

\<screen description – no audio\> Spin icon displays.

Combine 2

What if we wanted to prioritize our missed appointment follow-up by starting with pregnant women?

> WIC STAFF: I don't have a lot of time. I really want to make sure we follow-up with the pregnant women who missed their appointment first.

Well, we would want pregnant women where kept and followed-up are no.

Go ahead and select the filters.

\<no audio\> Select Pregnant from WIC Category, No from Kept, and No from Followed-up then click the Search button.

Combine 3 - 9

\<no audio\> Select Pregnant from WIC Category, No from Kept, and No from Followed-up then click the Search button.

\<Waiting\>

\<screen description – no audio\> Spin icon displays.

Combine 10

We have a lot of different ways to filter the calendar, which may be helpful.

If we click on the Lee Household appointment…go ahead.

Combine 11

We can see that Norma is pregnant, the appointment was missed, and that no follow-up has been completed.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or false?

We can click the Clinic dropdown in the header of the Clinic Schedule to view other clinics' schedules.

Answer #1

The answer is false.

The Clinic dropdown in the Clinic Schedule is disabled and we can only view the appointment schedule for the clinic we are currently working in. To view other clinic schedules, we must first select the Clinic from the dropdown on the main Search page.

Multiple Choice Q#2

Which statement is true?

    A. We can create our own Resource Groups.

    B. We cannot filter for Group Education Classes.

    C. The resources in the Resource field display all resources scheduled for the view that is displaying.

    D. We can only filter the calendar by one dropdown option at a time.

    E. We can only filter in the Clinic Schedule. There isn't a Scheduler panel that filters appointments in the Scheduler.

Answer #2

The answer is C.

Only the resources scheduled for the time period being viewed (day, week, or month) will auto-populate in the Resources field.

Explanation why other answers aren't true:

A – Resource Groups are managed by the State Office and are therefore, not used beyond the default "General Staff".

B – The Appointment Type dropdown allows us to filter the calendar by household-level and individual-level appointments, as well as Group Education classes.

D – We can filter the calendar by as many of the dropdown options at a time as we want.

E – We can filter appointments in both the Clinic Schedule and the Scheduler. The Scheduler panel is simply auto-collapsed in the Scheduler since filtering isn't really helpful when scheduling appointments.

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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