

Scheduler 1A - Overview – WINNIE Online Training Module

JUNE 2023

Introduction

Intro

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

Topic

Date

All dates in this module are based on today's date being June 22, 2023.

Overview 1

Regardless of how an agency chooses to schedule appointments, whether same-day/flexible or basing it on the next expected nutrition visit for the household, in-clinic or remote, how we schedule and maintain appointments in WINNIE is the same.

We can schedule appointments only once a participant has been added to our database, so we can schedule for either existing or prescreened participants.

Overview 2

Since appointment information can take up a lot of space in the database, it is maintained for 90 days past the date of the appointment, and then it is purged from the database.

Schedule Pages

There are three different appointment pages: the Clinic Schedule on the Participant List sidebar and the Scheduler and Appointments pages in the Participant Folder.

We are going to start with the Scheduler page.

Scheduler Icon 1

The icon that looks like a calendar on the participant card opens the Scheduler.

The icon displays as long as we are searching anywhere other than statewide.

We learned earlier that when we click the household link on the participant card...go ahead and do that...

Statewide 1

...the system automatically switches to statewide.

In Statewide, the Open Scheduler icon no longer displays on the participant card because the Scheduler page it opens is within the participant folder and the icon does not have any mechanism to transfer the participant or household to our agency first.

If all the household members are in our agency, we can simply select Agency and click the Search button.

Go ahead and do that.

<no audio> Select Agency and click the Search button.

Statewide 2

<no audio> Select Agency and click the Search button.

Scheduler Icon 2

If the participant or household belongs to another agency, we will have to transfer them into our clinic first before we are able to schedule an appointment for them.

As long as the participant belongs to the **clinic** we are working in, when we click the Open Scheduler icon on the card...go ahead...

<no audio> Click the Open Scheduler icon.

Open Scheduler 1

...the participant folder is opened, and if there are alerts, the Alerts modal displays.

Close the alert.

<Waiting>

<screen description – no audio> Spin icon displays.

Sidebar

Notice the Scheduler is also available under the Calendar section of the sidebar within the Participant Folder.

<Transition Slide>

<screen description – no audio> Slide transitions from Scheduler page to Search page with household from another clinic.

Different Clinic 1

However, if we open the Scheduler for a participant that belongs to another clinic in our agency, such as the Sary family who belong to Clinic 167 – Cottage Grove...go ahead and click the Open Scheduler icon on Emma's participant card...

<Waiting>

<screen description – no audio> Spin icon displays.

Different Clinic 2

...alerts do not display because their folder is not opened (that would require a transfer to occur) and we can see this because the sidebar continues to display the Participant List options.

Notice the Clinic, and the Calendar panel below, display for the clinic **they** belong to.

So, we can schedule appointments at another clinic in our agency without transferring the participant or household to the clinic we are currently working in!

<Transition Slide>

<screen description – no audio> Slide transitions from Clinic 167 Scheduler page to topic page.

Scheduler Overview

<Transition Slide>

<screen description – no audio> Slide transitions from topic page to Clinic 166 Scheduler page.

Scheduler 1

There are three panels on the Scheduler page.

The Scheduler panel at the top is automatically collapsed.

Click the plus icon on the far right of the header to expand the Scheduler panel.

Scheduler 2

This panel allows us to filter the schedule for certain types of appointments.

It's on this page because it shares the same interface with the Clinic Schedule, which is where we might use this feature.

Since this isn't really something we would use when scheduling appointments it's collapsed when we open this page.

We'll see how the filters work in another training module when we review the Clinic Schedule page.

Go ahead and click the minus sign icon to collapse the panel again.

Scheduler 3

Let's also collapse the Schedule Appointment panel for now and jump down to the Calendar panel.

Click the minus sign icon on the far right of the Schedule Appointment header.

Calendar 1

The Calendar defaults to the current date in Day view.

The blue line indicates the current time.

Each column in our calendar represents a staff person, called a resource, and their availability for appointments.

Appointment schedules can have generic labels to represent certain types of staff, such as RD or CPA1, like we see here and can also be specific staff names.

That is determined by how our agency schedules appointments.

Calendar 1A

Time periods that are **not** part of the resource schedule display in dark gray.

Time periods that are part of the resource schedule display in white.

Calendar 1B

While in Day view, the previous and next arrows move the calendar backwards and forwards by one day.

Click the right arrow (or next button) to move forward one day.

<no audio> Click the right arrow (next button).

<Waiting>

<screen description – no audio> Spin icon displays.

Calendar 2

If we click the date button...

Calendar 3

...a dropdown calendar displays that allows us to select a different day, and we can use the up/down arrows to jump to the month before or the month after.

Click the up arrow.

<no audio> Click the up arrow icon.

Calendar 4

In Day view, we can use the Today button to jump back to the current date.

Click the Today button.

Calendar 5

We can also view the calendar by week or month.

Click the Week button.

<Waiting>

<screen description – no audio> Spin icon displays.

Scroll Bars

There are two vertical scroll bars, and keep in mind depending on the size of our monitor or screen, these may not be something that impact us.

Unfortunately, with the size of our training modules, and the limitations to our ability to scroll, we will use these a lot.

The internal scroll bar changes our view of the calendar.

The outer scroll bar changes our view of the entire page.

Click below the outer scroll bar.

Week View 1

When the week view is selected, whatever day we are currently viewing (in this case, June 22nd) will be included in that week.

Each day will display **all** of the resources scheduled for that week, regardless of whether they are scheduled for a particular day.

That can be a lot of scrolling if our agency has a number of different resources that work each week.

Go ahead and click to the right of the horizontal scroll bar to view the entire week.

Week View 2-3

<no audio> Click to the right of the horizontal scroll bar.

Week View 4

Each column will begin at the earliest time a resource is scheduled that week, in this instance 8AM, and end at the latest time.

This is true for Day view as well.

Week View 5

The Appointment Type Legend will display anything scheduled that week including holidays, events, classes, and appointments.

We'll talk about the legend a little more in a minute but for now, let's talk events.

Events 1

Partial-day occurrences are labeled as "Events" and display in blue.

<Transition Slide>

<screen description – no audio> Slide transitions Clinic 166 Week view to Clinic 168 Day view.

Events 2

Partial-day events can be scheduled to overlap resource schedules as long as there aren't any existing appointments when the event is created.

If the time period the event is scheduled for overlaps a resource schedule, as shown for July 28th at Clinic 168 – Forest Lake, it will display in that resource column and essentially block that time.

Event Conflict

If we were to try to schedule an appointment during the event, the system won't allow us, and a conflict message will display indicating why.

Click the button to continue.

Events 3

In day view, if an event exists on that day, such as the All Staff Meeting on June 23rd, and **doesn't overlap any resource schedules**, it will display in the legend for that day and not on the day itself.

Click the button to continue.

Week View 6

Now let's take a look at a month view and holidays.

Click the Month button.

<Waiting>

<screen description – no audio> Spin icon displays.

Month View 1

When scheduling appointments, there isn't an overall view of the calendar that indicates which days have resources available except if we change to month view.

Like the week view, the Legend displays all holidays, events, classes, and appointments scheduled during the month.

The Scheduler Configuration, which we haven't looked at yet, is disabled **only** in Month view.

Month View 2

The green background indicates the current date.

Light gray are dates that are in the past.

Go ahead and click below the internal scroll bar.

Month View 3

White backgrounds are dates that have resources available, and dark gray are those that don't.

Blue backgrounds are dates that have every single time slot filled and no longer have any appointments available.

This **only** displays in month view.

The dark gray row on the white calendar dates are resource blocks.

Blocks are periods of time during a resource schedule that a resource is not available, such as lunch or a dentist appointment.

Month View 4

Month view is great if there aren't any appointments or classes, but as we can see on the 22nd and 30th, each appointment has a row on the date it's scheduled.

Not a problem if we are a small agency with a small number of appointments.

Potentially problematic if we are a mid-to-large agency with lots of appointments because not only does the calendar expand and require more scrolling, but it will also take longer for the calendar to load.

For some of us, it may be simpler just to use the Day or Week views to find days with appointments.

Month View 5

When in month view, our previous and next arrows move us backwards and forwards a month. Click the June 2023 button to open the dropdown calendar.

Month View 6

The dropdown allows us to select a month.

The up/down arrows take us back a year and to the next year.

Let's take a look at July. Go ahead and select it.

<Waiting>

<screen description – no audio> Spin icon displays.

Holidays 1

Holidays are pink.

Holidays are different from events in that they are **all day** occurrences and when scheduled, resources **cannot** be scheduled on that date.

They display on the calendar in month view...

<screen transitions to week view>

Holidays 2

...and when in week view.

Click the button to continue.

Holidays 3

But in day view, the only indicator it is a holiday is the holiday displayed in the legend.

Click the button to continue.

Month View 7

Let's go back to June by clicking the Today button.

<Waiting>

<screen description – no audio> Spin icon displays.

Today Button

The Today button maintains our selected view and jumps us to the day, week or month that contains the current date.

Return to Day 1

In Month view, we can also double-click on a date to open it in Day view.

Since, as we'll see in the next module, clicking on rows within the date has other functionality, we need to click in the area above or below the appointment rows.

Go ahead and double-click June 22nd.

<no audio> Double-click above the rows on June 22nd.

Return to Day 2

And we're back in Day view.

We'll continue our review of the Calendar panel on the Scheduler page in the next training module.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

Only the resources scheduled for a specific day display for that day when in Week view.

Answer #1

The answer is False.

Each day displays **all** of the resources that are scheduled during that week.

Multiple Choice Q#2

Which statement is true? (single answer)

- A. Month view displays rows for resources, blocks, appointments, and group education classes.
- B. The blue background indicating there aren't any appointment slots available on that date displays on all calendar views (day, week, and month).
- C. Neither holidays nor events display on the calendar in Day view; they only display in the Legend.
- D. The Today button maintains the current calendar view and jumps to the day, week, or month that contains the current date.
- E. None of these are true.

Answer #2

The answer is D.

The Today button maintains whatever view we are using (day, week, or month) and jumps us to the current date for day, or the week or month that contains the current date.

Explanations for Other Answers:

A – Month view does not display rows for resources.

B – The blue background indicating there aren't any appointment slots available for that date only displays on the Month view calendar.

C – Holidays only display in the Legend in Day view, but events will display on the calendar if they overlap resource schedules.

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.

SCHEDULER 1A - OVERVIEW

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