

# Scheduler 2A – Participant 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 individual participant appointments in WINNIE, the MN WIC Information System.

## Scheduling Overview

### Overview 1

In these modules, we are going to focus more on **how** to schedule appointments than **when or what** appointments should be scheduled for participants since that is at the discretion of our agency practices and the requirements of the WIC Program.

### Sync HHs 1

In general, appointments should be scheduled to meet the needs of the household.

Syncing members so that they can take care of multiple appointments at once is encouraged but only if desired by the family and as long as it takes into consideration the constraints of certification dates.

As we'll learn in later training modules, we can start a cert up to 45 days before the end date for most participants and issue benefits in the month after their cert end date in an attempt to help sync households.

### Sync HHs 2

Terminating certifications to sync household members is **not** an approved practice.

Unfortunately, there just may be some circumstances where syncing all household members is **not** possible.

## General Concepts

Another general concept is scheduling the appointment near a household's next expected nutrition visit to try to ensure there aren't gaps in their food benefits.

To help with this, we should always toggle on Show Details before scheduling appointments.

## Can and Can't Do's

### <Transition Slide>

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

### Block Msg 1

Let's start with some things we can and can't do.

For these examples, we are looking at June 22<sup>nd</sup> and are in Hugh Bris's folder.

Let's start with blocks.

We have a block for CPA 1 from 11AM to 12PM.

Let's attempt to schedule an appointment during the block by double-clicking the 11:00 AM slot in the CPA 1 column.

### Block Msg2

A message displays indicating the resource is unavailable during the selected time.

Click OK on the message.

<no audio> Click the OK button.

### Block Msg 3

So, we can't schedule appointments that overlap a block.

But then why is there an appointment at 11:30 for CPA 1 that overlaps the block?

Well, blocks can be created that overlap existing appointments, which provides more system flexibility when creating our calendars.

If we see this, we know the block must have been created **after** the appointment.

Next, notice there is a group education class at 12:00PM.

If we attempt to schedule a 12:00 appointment for CPA 1 that overlaps the class by double-clicking the tiny open space to the right of the Group Ed class...

## Group Ed Msg 1

...a confirm message displays asking if we are sure we want to do this since the resource has a class and this will create an overbook.

Click No on the message.

## Group Ed Msg 2

So, we **can** schedule appointments that overlap a Group Education class.

What if we attempt to schedule another 11:00 appointment for CPA 2 by double-clicking the tiny open space next to the current appointment?

## Overbook Msg 1

Again, a confirmation message indicating an overbook displays.

This time let's click the Yes button.

## Overbook 2

The Appointment Level modal, which allows us to schedule for just the participant whose folder we are in, or multiple members of the participant's household displays next.

Another hot key tip: if we are scheduling an individual appointment, since our focus is on that button, we can just hit the Enter key on the keyboard.

Or we can click it.

Let's press the Enter key this time to schedule our appointment for Hugh.

<no audio> Press the Enter key on the keyboard to select the Schedule for Bris, Hugh button.

## Overbook 3

The read-only Confirm Appointment modal is next and shows who the appointment is for, the information we would have set in the Schedule Appointment panel prior to scheduling his individual appointment, and the appointment details.

It also provides us with another opportunity to create an Initial Contact if one is required.

Click the Save button.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Overbook 4

So, we **can** schedule appointments that overlap another appointment.

Overbooks in WINNIE are not very obvious; they simply display next to another appointment.

Let's delete this overbook.

Do you remember how to display the modal that has the Delete function?

Go ahead. Click anywhere for a hint.

<audio – hint> Single click on the appointment to display the Appointment Details modal with the delete function.

## Delete 1

Click the Delete button to delete the appointment.

## Delete 2

We are sure. Click the Yes button.

## <Waiting>

<screen description – no audio> Spin icon displays.

## <Transition Slide>

<screen description – no audio> Red box highlights where only one appointment now displays. Slide transitions from June 22 to July 28<sup>th</sup>.

## Event Msg 1

Lastly, we saw this when reviewing events on July 28th, if we double-click in the tiny open space next to an event...

## Event Msg 2

...a message displays indicating the appointment cannot be scheduled because an event is scheduled during the same time.

Click OK on the message.

<no audio> Click the OK button.

## Event Msg 3

So, we can't schedule appointments that overlap an event.

Lastly, as we already know, we can't edit, reschedule, or delete appointments in the past.

## <Transition Slide>

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

## Scheduling Appointments

### Date

All dates in the rest of this module are based on today's date being July 3, 2023.

## <Transition Slide>

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

### Search 1

We are going to work with Hugh again who belongs to the clinic we are currently working in. He had an appointment on June 29<sup>th</sup> that he missed, so mom wants to schedule another one. What should we do first before opening a folder or scheduling an appointment?

Go ahead. Click anywhere for a hint.

<no audio> What should we do before opening a folder or scheduling an appointment? Click anywhere for a hint.

<audio – hint> Toggle on Show Details.

PARTICIPANT: "Hi! My son, Hugh, had an appointment last week and we missed it. Can I reschedule?"

WIC STAFF: "You bet!"

### Show Details 1

Hugh has only been prescreened, as indicated by all cert information displaying N/A.

Since his previous appointment is in the past, it doesn't display on Show Details.

Go ahead and open the Scheduler using the calendar icon on the participant card.

### Alert 1

Review the alert then close it.

<no audio> Close the alert.

<screen description – no audio> Alert reads: *During Prescreen, mom said Hugh’s doctor diagnosed him as lactose-intolerant and had lots of question about whether we could provide the “right” milk. Reassured her we could, but assume she’ll still have questions at appt. She also said she was on WIC when pregnant a couple of years ago and is familiar with the WIC Card (but no longer has her old one).*

## Schedule Appt 1

The Schedule Appointment panel allows us to schedule an individual-level appointment for the participant whose folder we are currently in.

The Clinic defaults to the clinic the participant currently belongs to in our agency.

The WIC Category defaults to their current category, the same category that displays on the Demographics page.

The Appointment Type displays those specific to our agency.

Click the dropdown.

<no audio> Click the Appointment Type dropdown.

## Schedule Appt 2

Our options are listed alphabetically, and it defaults to the first one in the list.

This is Hugh’s first cert, so let’s select INITIAL CERTIFICATION.

## Schedule Appt 3

The Duration is the default length in minutes that has been set for the appointment type.

Click the dropdown.

<no audio> Click the Duration dropdown.

## Schedule Appt 4

If our agency permits, we can adjust the duration by 5-minute increments, with a maximum of 2 hours.

Since, as our alert indicated, mom is familiar with WIC and the WIC Card, let’s decrease his appointment to 30 minutes.

<no audio> Select 30 minutes.

## Comments 1

The Comments text box allows letters, numbers, and special characters, and has a limit of 500 characters.

As we'll see later, Comments can only be viewed when editing appointments and on the Appointments page.

Depending on the comment, it may be more appropriate to create an alert.

We'll just enter a quick comment about why we changed the appointment duration.

Go ahead and click into the text box.

WIC STAFF: I should just enter a quick comment about why I changed the duration.

<no audio> Click into the Comments text box.

## Comments 2

<no audio> Text: Mom on WIC before and familiar with WIC Card. Scheduled appt for only 30 minutes.

## IC 1

Since the Initial Contact should always be completed when scheduling appointments, the Initial Contact button is available multiple times during the scheduling process.

Since Hugh is new, we know that the Initial Contact was created during the Prescreen and hopefully, completed when the appointment for June 29<sup>th</sup> was scheduled.

Let's just verify. Click the button.

<no audio> Click the Initial Contact button.

## <Waiting>

<screen description – no audio> Spin icon displays.

## IC 2

Yep. The Initial Contact was created on June 26<sup>th</sup> and the first appointment offered was June 29<sup>th</sup>.

Click the Cancel button.

<no audio> We'll review Initial Contact in detail in its own training module.

## Schedule Appt 5

In this instance, we completed the Schedule Appointment information prior to finding a date, but we will all find our own flow as we become more familiar with scheduling in WINNIE.

So, now let's find a date for the appointment.

Depending on our agency, and the impact of the limitations to each view, we might find it handy to view a month or week first or maybe we just use the calendar to jump from day-to-day.

Let's take a look at month view.

Go ahead. Click anywhere for a hint.

<no audio – hint> Click the Month button on the far right under the Calendar header.

<Waiting>

<screen description – no audio> Spin icon displays.

## Calendar 1

Click below the outer scroll bar.

## Calendar 2

We know that white calendar dates mean available resources and we have some days available this week.

We're going to schedule the appointment on July 6<sup>th</sup>.

Remember how to go directly to the day view for the 6<sup>th</sup>? Go ahead. Click anywhere for a hint.

<audio – hint> Double-click in the blank space on the June 6th date (not on the block or appointment rows).

<no audio> Go directly to the Day view for July 6th. Click anywhere for a hint.

WIC STAFF: Would Thursday or Friday work for you?

PARTICIPANT: "Sure. Thursday works. Do you have anything around 8 or 9?"

<Waiting>

<screen description – no audio> Spin icon displays.

## Schedule Appt 6

As we saw before, to schedule the appointment for CPA 1 at 8:00 AM, we simply double-click the 8:00-8:15 slot under CPA 1.

Go ahead and do that.

WIC STAFF: 8:00 AM?

PARTICIPANT: "Yep. Sounds good."



## <Waiting>

<screen description – no audio> Spin icon displays.

## Schedule Appt 7

Since we are just scheduling for Hugh, click that button or press the Enter key.

<no audio> Click the Schedule for Bris, Hugh button or press the Enter key on the keyboard.

## Schedule Appt 8

We should always double-check the information then click Save.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Edit Modal 1

What if mom decides 9:00 AM would work better?

What do we do to ensure the 9:00 appointment is still open? Go ahead. Click anywhere for a hint.

<no audio> Ensure the 9:00 appointment is still open. Click anywhere for a hint.

<audio – hint> Click the Refresh button.

PARTICIPANT: “You know what? Can we do 9:00 instead?”

WIC STAFF: Of course. Let me make sure it’s still open.

## Edit Modal 2

Still good to go.

Do you remember how to go directly to the edit modal? Go ahead. Click anywhere for a hint.

<no audio> Go directly to (or immediately open) the edit modal. Click anywhere for a hint.

<audio - hint> Double-click on the appointment to immediately open the Edit modal.

## Edit Modal 3

As long as an appointment is still in the future, it can be edited, and we can update any of the fields.

Let’s change the appointment to 9 AM by clicking the Time field, selecting from the dropdown, and clicking Save.

<no audio> Change the appointment to 9:00 AM by clicking the Time field, selecting from the dropdown, and clicking the Save button.

### Edit Modal 3A-3B

<no audio> Change the appointment to 9:00 AM by clicking the Time field, selecting from the dropdown, and clicking the Save button.

### <Waiting>

<screen description – no audio> Spin icon displays.

### Edit Modal 3C

<no audio – screen description> Green highlight indicates Hugh’s appointment is now at 9:00 AM.

### Click-and-Drag

We are also able to click-and drag appointments to other times or columns.

<screen description – no audio> The appointment is dragged to 8:30 AM and a confirmation message asking “Are you sure...” displays.

### Edit Modal 4

If we go back to the search page, go ahead...

PARTICIPANT: “Sorry about that. 8:30 definitely works.”

WIC STAFF: No worries! Hugh’s all set for Thursday at 8:30 AM.

### Search 2

...and toggle on Show Details again...

### Show Details 2

...it now displays his next scheduled appointment.

### <Transition Slide>

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

## Test Your Knowledge

### T/F Q#1

True or False?

Blocks and appointments may overlap on the schedule.

### Answer #1

The answer is True.

Blocks can be added to the schedule that overlap existing appointments. This provides extra flexibility in adjusting the calendar. However, appointments cannot be scheduled that overlap the block once it is added to the calendar.

### T/F Q#2

True or False?

We can schedule appointments at the same time and for the same resource as existing appointments.

### Answer #2

The answer is True.

As long as we aren't creating an appointment for the same participant or household that overlaps an existing appointment, we can overlap any other participant or household appointments. A message will display indicating that we are overbooking.

## 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.

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