

Calendar 1A – Appointment Types – WINNIE Online Training Module

MAY 2023

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is an overview of Calendar Appointment Types used when scheduling participant appointments in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being May 3, 2023.

Overview

Calendar Worksheet

A Calendar Worksheet is available on the MDH WIC website to assist with developing the WIC calendar.

If interested, please see the following URL:

<https://www.health.state.mn.us/docs/people/wic/localagency/winnie/training/worksheet.pdf>

Click the button to continue.

<Transition Slide>

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

Scheduler 1

We develop the WIC Calendar for our agency and clinic(s) Scheduler.

In this module, we'll review Appointment Types.

Go ahead and click the Appointment Type dropdown...

Scheduler 2

We are going to add a new appointment type, edit the Individual Nutrition Education/Check Pickup, deactivate the Subsequent Certification, and delete the PHONE Pregnant.

If we click the appointment for Charmer, Wiley...

Scheduler 3

...we can see Wiley is scheduled for the Appointment Type we'll edit.

Click the Close button.

Waiting

<screen description – no audio> Spin icon displays.

Scheduler 4

And if we click the appointment for Truck, Ford...

Scheduler 5

...we can see Ford is currently scheduled for the appointment we are going to deactivate.

Click outside of the Appointment Details modal to close it.

Waiting

<screen description – no audio> Spin icon displays.

Scheduler 6

Let's click the Toggle Applications icon to return to the Module Launcher.

Module Launcher

The Agency Administration module displays when we have the WINNIE CPA with Calendar role (Role 22).

Select the Agency Administration module.

Sidebar Options

Our Calendar options are at the top of the sidebar.

The other options on the sidebar are only viewable if the staff person also has the WINNIE Agency Admin role (Role 20).

The options for creating the calendar are alphabetical and not really in the order we would want to follow when creating our calendar from scratch.

Calendar Options

First, we need to define the kinds of appointments we schedule at our agency.

Second, is Resources. We need to name our appointment columns.

Third, we should identify Holidays and Events and indicate days or time periods our clinics aren't available.

Lastly, we create our Resource schedules, defining the days and times appointments can be scheduled.

Group Education Classes are somewhat separate in that they are an additional component that agencies can choose to use but aren't necessary to create the calendar. However, we are dependent on the Resources and Resource Schedules to manage them.

Select Topic

Regardless of what type of scheduling we do, such as trimonthly based on the next nutrition visit or same-day flexible, or a combination, the process for developing our calendar is the same.

It's just a matter of how far into the future we develop it for and in WINNIE, there is no limit to how far into the future a calendar can be created.

As indicated, we have to select a topic from the sidebar to start.

Let's click on Appointment Types.

Waiting

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Appointment Types

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Appt Types

Since calendars are agency-specific, if we have access to more than one agency, the Agency becomes a dropdown in the header, and we can select which agency we want to develop our calendar for.

Otherwise, the agency is read-only.

The grid is also read-only and displays our current appointment types.

We can define any type of appointment we want for our agency so let's start by adding a new one.

Click the Add button.

Descriptions

Both the Description and Short Description are required.

They are both alphanumeric and have limits of 50 and 10 characters and spaces, respectively.

Neither Description field allows any special characters.

The Description is used throughout the clinic scheduler while the Short Description is mostly used when generating schedule-related outputs.

We want a new appointment type we'll use for rechecking low iron values.

Let's enter Hemoglobin Check into the Description field then click into the Short Description field or hit the tab key on the keyboard.

WIC STAFF: I think we need a new appointment type we can use for rechecking participants with low iron.

Short Description

For our short description, we'll abbreviate it and type Hgb Check.

WIC STAFF: Hgb Check?

Active

Active is default toggled on and allows the Appointment Type to display in the Scheduler dropdown.

Reminder Flag

The Reminder Flag toggle and the Reminder Interval work together to indicate if, and when, our agency will send an automated email reminder to any participants with that type of appointment and an email documented for their household.

If we toggle on the Reminder Flag...

Reminder Interval 1

The Reminder Interval becomes enabled.

This is the number of days **prior to** a scheduled appointment that the automated email should be sent.

For example, if we schedule an appointment on Thursday, and have a reminder interval of 2 days, the email will be sent as part of End-of-Day on Tuesday morning.

Since it is auto populated with zero, which isn't a valid value, a message displays as a reminder that we must change this to a number between 1 and 99.

Our agency likes to send these reminders one week before the appointment so let's double-click inside the Reminder Interval field to highlight the zero...

WIC STAFF: We usually send these one week prior to the appointment.

Reminder Interval 2

...and type 7.

Reminder Note

We need to note that the email reminder does not automatically generate just because of these fields.

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<screen description – no audio> Slide transitions from Appointment Type modal to topics slide.

Automated Email 1

If an agency doesn't currently send the automated email reminder, but wants to start, the agency must contact the Data & MIS Unit at the State Office and provide a valid "from" email address.

This can be either a generic email address for the agency's WIC Program or an individual staff person's email.

The “from” email is then entered into the back end of WINNIE, which triggers the End-of-Day process to start sending emails for the agency.

Automated Email 2

NOTE: We do not have to do this again for WINNIE if our agency is already providing automated email reminders.

Sample Email 1

The Automated Reminder Email is a template that cannot be altered.

It begins with the Clinic address and the participant’s name, address, and State WIC ID.

The date is when the email was sent, which based on the Reminder Interval, was 7 days before the date of the appointment.

It provides when, where, why and what they’ll need for cert appointments.

Click the button to continue.

Sample Email 2

The next section of the email provides information about measurements and use of referral information, a quick reminder about canceling if unable to keep the appointment, and the statement that the email is system generated and to not reply.

Click the button to continue.

Sample Email 3

The end of the email has the USDA required Nondiscrimination Statement.

Click the button to continue.

Appt Color 1

We can also assign a color to each Appointment Type.

Click the dropdown.

<Transition Slide>

<screen description – no audio> Slide transitions from Appointment Type modal with color dropdown expanded to topic slide.

Appt Color 2

Here are some things we need to know about colors and appointment types:

1. The system uses the following colors to represent certain occurrences in the calendar:
 - a. Medium Blue to indicate a date has no more appointments available (9FC5E8)
 - b. Light Green for the current date (B6D7A8)
 - c. Light Pink for all-day holidays and events (DFC1CD)
 - d. Light Blue to define blocks of partial-day holidays and events (D9EDF6)

The colors are represented by 6-digit HEX values, which are used to identify that exact color.

Appt Color 2A

2. Adding color may slow the processing and display of the Scheduler pages. It doesn't appear too impactful to add a couple of colors but, as a general rule, we shouldn't add colors to every single Appointment Type. Maybe just those we want to be able to identify at-a-glance when looking at our calendar.
3. The color contrast must always meet accessibility standards. So, what does that mean?

Appt Color 3

In WINNIE, the font is always black, and we need to make sure that we can easily read the text against whatever color we choose.

In most cases, we just need to use common sense.

Looking at these colors, the top three all meet color contrast requirements.

But we need to ask ourselves... are they still easy to read if we are using smaller fonts?

If there is any question, don't use that color.

Best practice is to only choose only light or pastel colors.

For more information, refer to the [webaim Contrast Checker at: \(https://webaim.org/resources/contrastchecker/\)](https://webaim.org/resources/contrastchecker/)

<Transition Slide>

<screen description – no audio> Slide transitions from topic slide to Appointment Type modal with color dropdown expanded.

Appt Color 4

The default color for any new appointment is white, which has a HEX value of all Fs.

There are several ways to select a color.

If we click the Switch Mode icon...

Appt Color 5

...we can select from color blocks and click apply.

TIP! If we apply a color and we want to remove it, one way to do this is to switch to the color blocks and select the white block and click Apply.

Click the Switch Mode icon again...

Appt Color 6

...we can also select a color by clicking within the color palette.

Click in the middle of the black circle.

Appt Color 7

Information about the selected color displays below the palette.

We can change our palette color by clicking the hue slider.

Click in the middle of the black circle.

Appt Color 8

Next is the opacity slider and fields to enter either HEX or RGB values for a specific color.

NOTE! As we'll see later in the Scheduler, the HEX value for the gray used for existing appointments is c8c8c8.

There are a gazillion different little things to learn about this color palette and if we are really interested, we can review the information about it in Help and the DFDD.

We don't want to add a color for this type of appointment, but we'll come back to this in a bit when we add a color to an existing appointment.

Click the Cancel button.

Clinics 1

The grid at the bottom lists all of our agency's active clinics.

The include toggles, which by default are toggled on for all clinics, allow us to specify whether an appointment type is available when scheduling for that clinic.

For instance, we don't want to include our Hemoglobin Check as an appointment option at our TeleWIC Appointment clinic, so let's toggle off Include.

We can either select the row and then click Edit or double-click it.

Let's double-click the TeleWIC Appointment row.

WIC STAFF: Definitely can't recheck hemoglobin at the TeleWIC Appointment clinic.

Clinics 2

And toggle off Include.

Clinics 3

The Default Duration is the length of the appointment, and it is initially 15 minutes.

We could customize the appointment length for each clinic if we wanted to.

However, we are going to leave them all at 15.

Note that the Clinic name is read-only and cannot be changed.

Also, notice that after making our change, the Save button is disabled.

Whenever there are grids within a modal, we need to click the Update button to update the grid contents then we can save all modal changes and our new appointment.

Go ahead and do that.

<no audio> Click the Update button.

Save New Appts

Click the Save button.

Waiting

<screen description – no audio> Spin icon displays.

New Appts

Our new appointment is added to the grid in alphabetical order.

In the next module, we'll continue our overview by editing, deactivating, and deleting existing appointment types.

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Test Your Knowledge

T/F Q#1

True or False?

We can use any color we want when choosing colors for Appointment Types.

Answer #1

The answer is False.

The color we choose must meet accessibility requirements, which basically means we must be able to easily read the text, which is always in black font, against the selected color.

We can verify the color contrast is appropriate at: [webaim Contrast Checker](https://webaim.org/resources/contrastchecker/)
(<https://webaim.org/resources/contrastchecker/>)

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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