

# Calendar 3A – Holidays & Events – 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 adding Holidays and Events to indicate days or times when appointments should not be scheduled in WINNIE, the MN WIC Information System.

### Date

All dates in this module are based on today's date being May 8, 2023.

## Holidays and Events

### <Transition Slide>

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

### Holidays & Events

Once we have Appointment Types and Resources, and before we start creating our appointment calendars, we want to ensure any dates that cannot, or should not, be scheduled for appointments are specified.

Let's click on Holidays and Events.

### Clinic Dropdown

Calendars are created at the clinic level, and we can choose which clinic we want to view our calendar for by selecting it from the Clinic dropdown.

For now, we'll leave the clinic as is.

### Add Holiday 1

In WINNIE, there is no limit to how far into the future we can create our calendar.

Only Holidays added in WINNIE will display in WINNIE.

Since this is our first time working in our WINNIE calendar, we won't have any defined holidays. Let's click the Add button.

## Add Holiday 2

The Name field allows letters and numbers and has a limit of 50 characters.

It also allows a bunch of special characters including ampersands, apostrophes, commas, forward slashes, hyphens, periods, pound signs, and of course, spaces.

We have Memorial Day at the end of this month so let's type that into the Name field.

<no audio> Type: Memorial Day

## Add Holiday 3

We'll use the calendar control to specify our date.

Go ahead and click the icon.

<no audio> Click the calendar control.

## Add Holiday 4

Notice the dates prior to today are disabled.

Select May 29<sup>th</sup>.

## Add Holiday 5

We want to block off the entire day, so we will keep All Day toggled on.

## <Transition Slide>

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

## All Day

Holidays and events function differently based on whether they are All Day or not.

When All Day is toggled on, if resources are already scheduled for that date, the All-Day holiday or event cannot be created.

Once an All-Day holiday or event is created, resources cannot be scheduled for that date.

All Day events also display differently on the Scheduler pages in Clinic Services, which we'll see in a couple of minutes.

## <Transition Slide>

<screen description – no audio> Slide transitions to Holiday or Event modal.

## Add Holiday 5A

Go ahead and click the Apply to Clinic dropdown.

## Add Holiday 6

We can block this date for all our clinics, multiple clinics, or just one depending on whether we schedule for all our clinics or have multiple staff who create the calendar for their own clinic.

We're going to schedule this holiday for all our clinics.

Select Select All.

## Recurring 1

As we've seen before, we can de-select an individual clinic by clicking the x in the clinic button and clear the field by clicking the x in the field.

We can toggle on Recurring for holidays that occur on the same WIC week and day each year and add those to our calendar for as far into the future as we want.

## Recurring 2

For example, Martin Luther King Day is always celebrated on the 3<sup>rd</sup> Monday in January every year.

This is a holiday for which we could toggle on Recurring.

However, Independence Day, which always occurs on July 4<sup>th</sup> can't be recurring because it could be any day of the first week.

And Memorial Day, which occurs on the last Monday of every May is on either the 4<sup>th</sup> or 5<sup>th</sup> Monday depending on the year, so it can't be recurring either.

We will take a closer look at the Recurring toggle and what "WIC weeks" means when we take a look at partial-day events.

Click the Save button.

## Holiday Conflict Msg

If there are resources already scheduled for the date of the All-Day holiday or event, a message will display indicating this, and informing us that the holiday (or event) will not be added for that clinic...

...but it will display for the other clinics we added it to.

Click the button to continue.

## Icons 1

However, we didn't have a conflict and Memorial Day was added for each of our clinics, and we will see this once we've completed adding our holidays and events.

We'll see the icons to the right of Memorial Day over and over again in WINNIE.

Go ahead and hover over the icons.

Click the button to continue.

## Icons 2

Both icons display as long as the date **and time** of the holiday or event is in the future.

That means if we create a holiday or event for today, the icons **will not display** because the time is already in the past.

We'll talk about blocking time for resources when we look at Resource Schedules, which is a better option for adjusting the calendar for the current date.

## Delete Icon

Because we applied the holiday to all our clinics, the Delete icon functions to delete the Holiday from **all clinics**, not just the clinic we are currently viewing.

If we want to delete the holiday or event from one of the clinics we applied it to, let's say for instance the TeleWIC Appointment clinic, we click the Edit icon.

<no audio> Click the Edit icon.

WIC STAFF: We are going to have a couple of staff working for overtime on the holiday at the TeleWIC Appt clinic.

## Edit Holiday 1

The Edit icon reopens the same Holiday or Event modal with our information already populated, any of which can be modified.

Since we selected all clinics when creating the holiday or event, any edits we want to make become **all or nothing**.

We cannot edit this holiday or event for just one, or a couple, of these clinics.

Our **edit** must apply to all.

Let's add a hyphen and the word "closed" after Day in the Name field.

<no audio> Type: -closed after "Day" in the Name field.

## Delete Holiday 1

OK. Now we want to delete this holiday from the TeleWIC Appointment clinic calendar...

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

<audio – hint> Click the x in the TeleWIC Appointment (236) button to remove it from the Apply to Clinics field.

## Save Edit 1

Let's save our changes.

## Waiting

<screen description – no audio> Spin icon displays.

## Hover 1

We can hover over the holiday on the calendar to view more information.

<no audio> Hover over the Memorial Day button on the 29<sup>th</sup>.

Click the button to continue.

## Another Modal 1

We can also click the holiday on the calendar....

<no audio> Click the Memorial Day button on the 29<sup>th</sup>.

## Another Modal 2

...to open a modal with the same Edit and Delete functions that the icons provide.

Click the Edit button.

## Same Modal

It opens the same modal we already edited.

Click the Cancel button.

## Add Event 1

We can also click today or preferably a future date on the calendar to open a new Holiday and Event modal, like clicking the Add button.

Events are dates and times when appointments can't be scheduled due to site constraints or resources being unavailable.

For instance, we have an all staff meeting every 4<sup>th</sup> Friday from 8:30AM – 12:00 PM, which means our resources are busy elsewhere and can't be scheduled for appointments.

Let's add this event for the rest of 2023.

Click the 4<sup>th</sup> Friday in May, which is the 26<sup>th</sup>, on the calendar.

<no audio> Click the 4th Friday in May (26th).

WIC STAFF: We need to add our all staff meeting that we have every 4th Friday from 8:30AM-12PM...

...since the majority of our staff will be unavailable for appointments.

We should get this on the calendar for the rest of this year.

## Add Event 2

We'll start by typing All Staff Meeting into the Name field.

<no audio> Type: All Staff Meeting

## Add Event 3

Notice that by selecting the 26th on the calendar, the Start Date has defaulted to that date.

This is not an all-day event. Toggle it off.

<no audio> Toggle off All Day.

## Partial Day 1

Once All Day is toggled off, Start and End Time fields display allowing us to create an event that spans part of a day, or a partial-day event.

## <Transition Slide>

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

## Partial Day 2

As we said before, holidays and events function differently based on whether they are All-Day or not.

When All Day is toggled off, if resources are already scheduled for that date, as long as **no appointments have been scheduled** that conflict with the time of the event, the partial-day holiday or event can be created.

## Partial Day 3

If a partial-day holiday or event has already been created, resources can still be scheduled that overlap the event.

However, **appointments cannot be scheduled** for those resources that conflict with the partial-day event.

## Partial Day 3

This functionality provides flexibility around scheduling partial-day events in that when scheduling our resources, we do not have to work around this type of event and when scheduling this type of event, as long as no appointments conflict with the event times, we don't have to remove or adjust resource schedules.

## Add Event 4

The Start and End Time fields do not require us to enter leading zeroes for times between 1 and 9, and they are not case-sensitive.

However, we must enter a space between the time and the AM/PM designation.

WIC STAFF: Meeting from 8:30 to 12:00 but we need drive time before and after... and time for lunch!

Hmmmm. 8AM until 1:30PM should work.

We want to make sure our times span the entirety of the event so let's enter 8AM to 1:30PM.

Click into the Start Time field.

## Add Event 5

Our dropdowns start at 12:00 AM and we can select from 15-minute increments.

We can also manually type any time.

Our field does require the colon (:) between the hour and minutes and the space between the time and AM/PM.

Type: 8:00 AM and click or Tab into the End Time field.

<no audio> Type 8:00 and click into the End Time field or press the Tab key on the keyboard.

## Add Event 6 – double check

The same time defaults into the End Time and there is no amount of clicking we can do to highlight the default time so that we can over-write it.

However, we can hit our back-space key 7 times if we are keyboard-inclined, or scroll, which can be a bit tedious, or we can select a time from the dropdown and then highlight it and overwrite it.

Anyway, lots of options, just maybe not the most intuitive.

## Add Event 7

Let's hit our backspace key.

## Add Event 8

Type: 1:30 PM.

## Add Event 8A

The validation message currently displays despite the requirement being met and it will continue to display until we save our changes.

Or we can force the system to validate our time by clicking another field, such as the Apply to Clinics dropdown...

<no audio> Click the dropdown.

## Add Event 8B

...clicking the End Time field again...

<no audio> Click inside the End Time field.

## Add Event 8C

...and clicking inside the Apply to Clinics field one more time.

## Add Event 9

So much better! (Of course, if it doesn't bother us, we can just leave it to clear when we save all our changes.)

Let's Select All since all our staff attend.

<no audio> Select Select All.

## Add Event 10

This time, we'll toggle on Recurring because this meeting is every month on the same WIC week and day.

<no audio> Toggle on Recurring.



## Add Event 11

With a recurring holiday or event, we must enter both an end date and select from the Weeks of Month dropdown.

### <Transition Slide>

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

## WIC Weeks

Our calendar is based on what we call “WIC Weeks”.

Basically, this means we assign weeks vertically, or top to bottom, instead of horizontally, or left to right.

We start counting our weeks with the first day of the month, which in this case is Thursday.

This is designated first Thursday.

The next 6 days are week 1.

Week 2 starts on the same day, Thursday, one week later.

The thing to note with WIC Weeks, and using this month as an example, is that the first Thursday and Friday come before the first Monday, Tuesday or Wednesday.

### <Transition Slide>

<screen description – no audio> Slide transitions to Holiday or Event Series modal.

## Add Event 12

Let’s click into the Recurring Until Date field.

## Add Event 13

We want to add this meeting through the end of this year, so let’s type 12/31/23.

## Add Event 14

Our next step is to select the WIC weeks and days.

We should note that we can select as many weeks and days as is appropriate for an event.

For this event, we’re just going to click the Friday dropdown.

## Weird Field 1

Admittedly, this is a little odd looking, but this blue field does have functionality.

We can type a hot key, like 4...

<no audio> Type: 4

## Weird Field 2

...and it displays only the 4<sup>th</sup> checkbox.

Actually, we should have said it was completely unnecessary functionality.

Obviously, it's quicker to just select the 4<sup>th</sup> week checkbox but we'll see this pop up again when we review Resource Schedules and now, we know what and why it is.

Select the checkbox for the 4<sup>th</sup> week.

<no audio> Select the 4<sup>th</sup>.

## Add Event 16

Notice the selection displays in the Friday field as expected.

Since we are scheduling multiple events at once, our Save button has changed to Save Series.

Go ahead and click it.

## Waiting

<screen description – no audio> Spin icon displays.

## Conflict Message

Since partial-day events can be added if resources are already scheduled, conflicts will only occur if appointments are scheduled that overlap the proposed event.

This message indicates that an **appointment is already scheduled** on May 26<sup>th</sup> at Clinic 236.

Since this is a recurring event at multiple clinics, this message is a bulleted list of each conflict and where it is occurring.

The event cannot be created where conflicts with scheduled appointments exist.

Click the OK button.

## Calendar 1

We will continue our review of the Holidays and Events calendar in the next training module.

Click the button to continue.

## Test Your Knowledge

### T/F Q#1

True or False?

We can toggle on Recurring for Thanksgiving Day each year.

### Answer #1

The answer is True.

Thanksgiving occurs on the same week and day each year, 4<sup>th</sup> Thursday of November, which means we could toggle on Recurring for that holiday.

### T/F Q#2

True or False?

With WIC weeks, third Monday may come after third Friday.

### Answer #2

The answer is True.

WIC weeks assigns the week vertically and starts counting the first week with the first day of the month.

If week 1 starts on any day after Monday, first Monday will come after the first Friday, and therefore, the third Monday will also come after the third Friday.

### Multiple Choice Q#3 (single answer)

Multiple Choice – select the correct answer.

Which statement is true?

- A. Partial-day events cannot be scheduled for a date/time that overlaps previously scheduled resources.
- B. All-day events can be scheduled for the same date as previously scheduled resources as long as no appointments are scheduled.
- C. Appointments can be scheduled that overlap partial-day events.
- D. Partial-day events provide flexibility in that they can be created even if resources and appointments exist that overlap the date/time of the event.
- E. None of these statements are true.

## Answer #3

The answer is E.

None of these statements are true.

Corrected statements:

- A. Partial-day events **can** be scheduled for a date/time that overlaps previously scheduled resources.
- B. All-day events **cannot** be scheduled for the same date as previously scheduled resources regardless of whether appointments are scheduled.
- C. Appointments **cannot** be scheduled that overlap partial-day events.
- D. Partial-day events provide flexibility in that they can be created if resources, but **not** appointments, exist that overlap the date/time of the event.

## 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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