

# Scheduler 3A – Household 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 household appointments in WINNIE, the MN WIC Information System.

### Date

All dates in this module are based on today's date being July 11, 2023.

### <Transition Slide>

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

### Search 1

In WINNIE, we can also schedule one appointment for multiple members in a household, or a household appointment.

Let's take a look at the Ning family.

Once again, what should we do before opening a folder? Click anywhere for a hint.

<audio – hint> Toggle on Show Details.

PARTICIPANT: "Hi! It's been a while and I was hoping my family could start getting WIC again."

WIC STAFF: You bet! Just let me see what's what...

### Search 2

Let's take a second to collapse the Search Criteria panel for more screen real-estate.

### Search 3

Click below the scroll bar.

## Details 1

Dawn is an infant of a breastfeeding woman who has not been issued any benefits but whose certification has been terminated for “Failed to Pick-up”.

Fully breastfed infants less than 6 months old, two-way linked to their mother’s record, and not issued benefits are terminated if their mother is, which means we should see that Eve has the same termination date and reason.

Dawn is certified through January 2024 and is due for her 9-month midcert in October.

Let’s take a look at Eve’s details. Click on her participant card.

## Details 2

As expected, Eve’s cert was also terminated for failed to pick-up on May 12th, 60 days after her last set ended.

Eve is certified through January 2024 and is due for a midcert this month but since she is breastfeeding, we can do the midcert at the same time as Dawn in October.

Click on Harken’s participant card.

WIC STAFF: Eve and Dawn will need a midcert in October.

## Details 3

Harken’s cert expired in March, and he was terminated for Cert Expired because he wasn’t recertified within 31 days of his Cert End Date.

So, we’ll want to get him in as soon as possible for a recert.

Click on Moe’s participant card.

WIC STAFF: ...need to get Harken in ASAP.

## Details 4

Moe’s cert just ended in June, so we’ll schedule an appointment with Harken.

Let’s check Penn’s details.

<no audio> Click on Penn’s participant card.

WIC STAFF: Moe too.

## Details 5

Penn’s cert also ended in March. We’ll get him in too.

Go ahead and open the Scheduler by clicking the calendar icon on Penn’s card.

<no audio> Click the Scheduler (calendar) icon on Penn’s card.

WIC STAFF: It appears we need to see Penn, Moe and Harken for appointments.

Participant: “OK. When?”

## Alert 1

We should note that in most of these instances, we are simply closing the alerts without reading, updating, or deleting them as appropriate. However, in real-case scenarios, we would want to address the alerts.

Close the alert.

## Scheduler 1

This time let’s find our appointment date first.

We know we don’t have any appointments open today but should have some on Thursday.

Go ahead and select July 13<sup>th</sup> from the calendar dropdown.

WIC STAFF: I know we don’t have any open appointments today, but we should still have some on Thursday.

## Scheduler 2

<no audio> Select July 13<sup>th</sup> from the calendar dropdown.

### <Waiting>

<screen description – no audio> Spin icon displays.

## Scheduler 3

We’re going to look for a noon appointment but first let’s get more screen real-estate.

Collapse the Schedule Appointment panel.

## Scroll 1

And click below the internal scroll bar.

## Scheduler 4

We are scheduling three 30-minute recerts.

We have plenty of time in the first column, but that's our Spanish resource and we may want to save those for our Spanish-speaking participants.

We also have an opening at 12:30 for CPA 2 but are 15 minutes shy of the 90 we need.

However, we may not need the whole 90 minutes since we're recertifying all three boys at once.

Let's schedule the 12:30 appointment for CPA 2. Click anywhere for a hint.

<audio – hint> Double-click the 12:30 to 12:45 appointment slot in the second column.

### <Waiting>

<screen description – no audio> Spin icon displays.

## HH Appt 1

This time, we want to click the Schedule for Household button.

## HH Modal 1

The Confirm Household Appointment modal opens.

The top section is static information that cannot be edited and is shared by all members including the Household ID, appointment date, the start and **proposed** end time, the resource it's scheduled with, and the Clinic where it's scheduled.

As we saw in the previous module, just like with individual participant appointments, if scheduling at another clinic, we need to select it from the Schedule Appointment panel **before** selecting our appointment time in the calendar.

Otherwise, it defaults to the clinic they currently belong to.

## HH Modal 2

In the bottom section, all household members, except for children over 5, have their own appointment card and are listed alphabetically by last name then first name.

The card header also has their State WIC ID.

## HH Modal 3

We use the Include toggle to indicate whether the member should be scheduled for this appointment.

Since neither Dawn nor Eve need an appointment right now, we are going to toggle them off.

Before we do, notice that the proposed end time is 1:45, which is based on the defaulted Appointment Type duration for each member's appointment.

Go ahead and toggle off Include for Dawn.

## HH Modal 4

When toggled off, the card automatically collapses, and the header now also displays Not Included.

The proposed end time adjusts as well. It's now 15 minutes earlier.

Go ahead and toggle off Eve.

<no audio> Toggle of Include for Dawn.

## IC 1

Before we go any further, and recognizing that we haven't reviewed Initial Contacts yet, we would be remiss not to complete the Initial Contacts for the three boys.

Each of the boy's certifications ended before today.

Because there is a gap between their Cert End Date and the date we are scheduling their appointments, we must complete an Initial Contact for each of them.

So, we are going to do that.

Click the Initial Contact button.

## IC 2

Click the New Contact button.

## IC 3

The only thing we need to add is the First Appointment Offered.

Click that calendar control.

## IC 4

Select July 13.

## IC 5

Click the Save button.

## IC 6

We need to save the same information for Harken and Moe.

Click the Participant menu.

## IC 7

Select Harken.

## IC 8

What do you think we do next? Click anywhere for a hint?

<audio – hint> Click the New Contact button.

## IC 9

Notice the First Appointment Offered default populated, since what is true for one member should usually be true for the other members.

All we have to do is click Save.

<no audio> Click the Save button.

## IC 10

Complete the Initial Contact for Moe. Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

## IC 11

<audio – hint> Select Ning, Moe.

## IC 12

<audio – hint> Click the New Contact button.

## IC 13

Since were done, let's click the Save & Close button.

## HH Modal 5

Just like when scheduling for individual participants, the WIC Category defaults to their current category and can be changed to match their category at the time of the appointment.

The Appointment Type lists only those specific to our agency, and the default is based on the first appointment in the alphabetical listing.

The Duration defaults based on whichever Appointment Type is selected.

The Comments function **exactly** the same, so much so that they are specific to the participant for whom they're written.

Go ahead and select Recertification from the Appointment Type dropdown in Harken’s card.

## HH Modal 6

<no audio> Select Recertification from the Appointment Type dropdown in Harken’s card.

## HH Modal 7

We can click the toggle arrows to re-expand or collapse member’s cards.

For example, if we wanted to include Eve, we could click the arrow to expand her card again and toggle her back on.

## HH Modal 8

Let’s click the toggle icon to collapse Harken’s card.

## HH Modal 9

Go ahead and select the appointment type for Moe.

<no audio> Select Recertification from the Appointment Type dropdown in Moe’s card.

## HH Modal 10

<no audio> Select Recertification from the Appointment Type dropdown in Moe’s card.

## HH Modal 11

We can also click their name on the card header to collapse or expand the card.

Go ahead and collapse Moe’s card by clicking his name.

## HH Modal 12

Last one. Select the Appointment Type for Penn.

<no audio> Select Recertification from the Appointment Type dropdown in Penn’s card.

## HH Modal 13

<no audio> Select Recertification from the Appointment Type dropdown in Penn’s card.

## HH Modal 14

Let’s see what happens when we click Save. Go ahead.

<no audio> Click the Save button.

## Overbook 1

Oh, that's right. Our appointment is 15 minutes too long.

We could schedule an Overbook or we could adjust one of the appointments to make it fit.

Let's do that. Click No.

<no audio> Click the No button.

## HH Modal 15

Let's change Penn's appointment to 15 minutes. Go ahead.

<no audio> Change Penn's appointment to 15 minutes.

## HH Modal 16

<no audio> Change Penn's appointment to 15 minutes.

## HH Modal 17

Click into the Comments fields and we'll type a brief comment.

## Comment 1

<no audio – screen description> Typed: Shortened since combined with siblings and to fit into time allotted.

## HH Modal 18

Click Save again.

## <Waiting>

<screen description – no audio> Spin icon displays.

## Scheduler 5

So, we have the appointments scheduled for the Ning boys, but we do a mix of scheduling and we're going to get those Midcert appointments scheduled as well today.

WIC STAFF: OK. The boys are set. We need to see you and Dawn in October. Do you want to schedule those now?



Participant: “Sure! It’d be great if I could get it on my calendar now. Can we do the same time?”

### <Slide Transitions>

<screen description – no audio> Slide transitions to Search page and Show Details.

### Details 6

Since the boys needed to be recertified, we wanted to get them in as soon as possible.

For the Midcert appointments, which we’re scheduling out 3 months, best practice is to, whenever possible, try to schedule on or before their benefit cycle starts, in this case (coincidentally enough) the 13<sup>th</sup>, to help ensure there aren’t gaps in their benefits.

### <Slide Transitions>

<screen description – no audio> Slide transitions from Search page and Show Details back to July 13<sup>th</sup> Scheduler page.

### Scheduler 7

Let’s try October 13<sup>th</sup>.

Click the dropdown calendar and using the next icon (down arrow), move the calendar forward 3 months, then select October 13<sup>th</sup>.

### Scheduler 8

<no audio> Click the dropdown calendar and using the next icon (down arrow), move the calendar forward 3 months, then select October 13<sup>th</sup>.

### <Waiting>

<screen description – no audio> Spin icon displays.

### Scheduler 9

Let’s schedule another household appointment at 12:30 for CPA 2 on October 13th. Go ahead. Click anywhere for a hint.

<audio – hint> Double-click the 12:30-12:45 PM slot in the CPA 2 column.

### <Waiting>

<screen description – no audio> Spin icon displays.

## HH Appt 2

<audio – hint> Click the Schedule for Household button.

## HH Appt 2A

Complete scheduling a MID CERTIFICATION appointment for Dawn and Eve, clicking below the scroll bar to view the next member’s card. Address each card in the order they display from top to bottom. Click for hints.

<audio – hint> Click the Appointment Type dropdown in Dawn’s card.

## HH Appt 2B

<no audio> Complete scheduling a MID CERTIFICATION appointment for Dawn and Eve, clicking below the scroll bar to view the next member’s card. Address each card in the order they display from top to bottom. Click anywhere for a hint.

<audio – hint> Select MID CERTIFICATION.

## HH Appt 2C

<no audio> Complete scheduling a MID CERTIFICATION appointment for Dawn and Eve, clicking below the scroll bar to view the next member’s card. Address each card in the order they display from top to bottom. Click anywhere for a hint.

<audio – hint> Click the Appointment Type dropdown in Eve’s card.

## HH Appt 2D

<no audio> Complete scheduling a MID CERTIFICATION appointment for Dawn and Eve, clicking below the scroll bar to view the next member’s card. Address each card in the order they display from top to bottom. Click anywhere for a hint.

<audio – hint> Select MID CERTIFICATION.

## HH Appt 2E

<no audio> Complete scheduling a MID CERTIFICATION appointment for Dawn and Eve, clicking below the scroll bar to view the next member’s card. Address each card in the order they display from top to bottom. Click anywhere for a hint.

<audio – hint> Click below the scroll bar.

## HH Appt 2F

<no audio> Complete scheduling a MID CERTIFICATION appointment for Dawn and Eve, clicking below the scroll bar to view the next member’s card. Address each card in the order they display from top to bottom. Click anywhere for a hint.

<audio – hint> Toggle off Include in Harken’s card.

## HH Appt 2G

<no audio> Complete scheduling a MID CERTIFICATION appointment for Dawn and Eve, clicking below the scroll bar to view the next member’s card. Address each card in the order they display from top to bottom. Click anywhere for a hint.

<audio – hint> Toggle off Include in Moe’s card.

## HH Appt 2H

<no audio> Complete scheduling a MID CERTIFICATION appointment for Dawn and Eve, clicking below the scroll bar to view the next member’s card. Address each card in the order they display from top to bottom. Click anywhere for a hint.

<audio – hint> Toggle off Include in Penn’s card.

## HH Appt 2I

<no audio> Complete scheduling a MID CERTIFICATION appointment for Dawn and Eve, clicking below the scroll bar to view the next member’s card. Address each card in the order they display from top to bottom. Click anywhere for a hint.

<audio – hint> Click the Save button.

## <Waiting>

<screen description – no audio> Spin icon displays.

## HH Appt 2J

Click the button to continue.

## Test Your Knowledge

### T/F Q#1

True or False?

We should always ensure the WIC Category matches their current category when scheduling an appointment.

## Answer #1

The answer is False.

When scheduling an appointment, the WIC Category defaults to the participant's current category. Best practice is to change the WIC Category to match whatever the participant's WIC Category will be at the time of their appointment.

## 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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