

Scheduler 4B – Appointment Details - 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 deleting, confirming, following up missed, and kept appointments in WINNIE, the MN WIC Information System.

Date

All dates in this module are based on today's date being July 20, 2023.

Delete

<Transition Slide>

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

Delete 1

We saw in a previous training module that we can delete future appointments on the Appointments page, and that deleting for household appointments is all or nothing.

Delete 2

We can also delete appointments in the Scheduler, and that same household caveat still applies.

We are going to delete the 12:00 PM Horse Household appointment.

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

<no audio> Delete the 12:00 PM Horse Household appointment. Click anywhere for a hint.

<audio -hint> Single-click the 12:00 PM Horse Household appointment.

Delete 3

<no audio> Delete the 12:00 PM Horse Household appointment. Click anywhere for a hint.

<audio -hint> Click the Delete button.

Delete 4

<no audio> Delete the 12:00 PM Horse Household appointment. Click anywhere for a hint. <audio -hint> Click the Yes button.

<Waiting>

<screen description – no audio> Spin icon displays.

<Waiting>

<screen description – no audio> Spin icon displays.

Delete 5

Remember, once an appointment is deleted, its record is also deleted from the database.

<Transition Slide>

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

Confirmed

<Transition Slide>

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

Confirmed 1

Agencies have many different methods for reminding participants about appointments.

For instance, we're going to do some reminder calls for Tuesday, July 25th.

WINNIE provides us with a method to document reminder contacts using the Confirmed feature.

Go ahead and click on the 10:00 AM Kett Household appointment.

WIC STAFF: I have some time. I'm going to do some reminder calls for next Tuesday.

Confirmed 2

Confirmed displays above the individual participant's appointment details and displays No by default.

For household appointments, Confirmed is household-level.

A confirmation can be added at any time, before or after the appointment, to allow flexibility in documenting.

Go ahead and hover over the little blue pen icon then click the button to continue.

Confirmed 3

Click the Confirmed Edit icon.

Confirmed 4

The Appointment Confirmation modal opens.

The date defaults to the current date.

Go ahead and click the calendar control icon in the Date field.

Confirmed 5

Note that all future dates are disabled.

A validation will display indicating future dates cannot be entered if a future date is typed into the field.

Click outside the calendar to close it.

<audio – hint> Click somewhere other than the calendar.

Confirmed 6

The Comments field is optional.

If our agency chooses to use this function, we may only be required to document the date the confirmation was completed, and we would simply click Save.

However, we may also need to provide some free-text documentation and we can do that in the Comments field, which allows letters, numbers, and special characters, and has a limit of 500 characters.

Click-and-Drag

We should note that by clicking-and-dragging the hashmarks in the bottom right corner, we can expand the Comments field.

Confirmed 7

Click into the Comments field and we'll type a quick note.

Confirmed 8

<screen description – no audio> Comment typed: Spoke with mom. Reminded her that both boys will need hgb done.

Confirmed 9

Click Save. <no audio> Click the Save button.

Confirmed 10

Once a comment is added, the Appointment Confirmation date displays along with a bubble icon and a delete icon.

If a comment isn't added, just the date, Edit and Delete icons display.

When we hover over the bubble icon, the comment displays in a tooltip.

Go ahead and hover, then click the continue button.

<no audio> Hover over the bubble icon to view the tooltip then click the button to continue.

Confirmed 10A

The only place the Confirmed comment displays is here, in the Appointment Details.

Confirmed 11

A little caution regarding the Confirmed Delete icon.

There is no validation message when it's clicked. The confirmation is just gone.

Confirmed 12

The Edit icon remains available in case we need to make changes to our confirmation. Go ahead and c the Close button.

<Waiting>

<screen description – no audio> Spin icon displays.

Confirmed 13

If we open the Appointment Details for the Kett Household appointment again...go ahead... <audio – hint> Single-click the 10:00 AM Kett Household appointment block.

SCHEDULER 4B - APPOINTMENT DETAILS

Confirmed 14

...the Confirmed comment automatically displays until we click somewhere else.

Go ahead and click somewhere on the screen.

Confirmed 14A

Click the button to continue.

Clinic Schedule 1

As we saw previously, the Clinic Schedule has a Y/N to indicate if the appointment was confirmed.

Click the button to continue.

Missed Follow-up

<Transition Slide>

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

Missed FU 1

We like to keep up on our missed appointments, so now that it's later in the day, we've run the Clinic Schedule and are contacting participants who missed their appointment today.

Agencies also have different practices for contacting participants after they've missed an appointment.

WINNIE provides a Missed Follow-up feature, which is very similar to the Confirmed feature.

It provides a way for us to indicate whether a participant has been contacted about a missed appointment.

This time, click on the 10:30 AM More Household appointment.

WIC STAFF: I have some more down time. I'm going to take care of some of those missed appointments!

Missed FU 2

Followed-up displays in the individual participant's appointment details rows, which means its participant level, not household regardless of the type of appointment.

SCHEDULER 4B - APPOINTMENT DETAILS

Missed FU 3

Followed-up displays differently based on the appointment's status.

Before the appointment, it displays NA.

If the appointment is Kept, it displays No.

Missed FU 4

If the appointment is missed, or not marked as Kept, it displays No and an Edit icon.

Click the Followed-up Edit icon in Clay's row.

Missed FU 5

The Missed Appointment Follow-up modal opens, and functions exactly the same as the Confirmed modal.

The Date can only be current and past dates, while adding a comment is optional and the field allows letters, numbers, special characters, a max of 500 characters, and can be expanded.

Go ahead and click Save.

<no audio> Click the Save button.

Missed FU 6

When saved, it displays the followed-up date, continues to display the Edit icon, and adds a Delete icon for that participant or member of the household.

Click the Edit icon in Clay's row again then click the Comments field and we'll type a quick note.

Missed FU 7

<no audio> Click the Edit icon in Clay's row again then click Comments field and we'll type a quick note.

Missed FU 8

<screen description – no audio> Text entered: Scheduled another appt for Clay and Manny on 7/25.

Missed FU 9

Click Save.

<no audio> Click the Save button.

SCHEDULER 4B - APPOINTMENT DETAILS

Missed FU 10

Once there is a comment, the bubble icon displays and we can hover over it to view it.

Go ahead and hover, then click the button to continue.

<no audio> Hover over the bubble icon then click the button to continue.

Missed FU 10A

The only place the Followed-up comment displays in WINNIE is here, in the Appointment Details.

Missed FU 11

Again, a little caution regarding the Followed-up Delete icon. There is no validation message when it's clicked. The follow-up is just gone.

Missed FU 12

Just like the Confirmed function, the Followed-up Edit icon remains available in case we need to make changes to our comment.

Remember how to close this modal? Go ahead. Click anywhere for a hint.

<audio – hint> Click anywhere outside the modal to close it.

<Waiting>

<screen description – no audio> Spin icon displays.

<Transition Slide>

<screen description – no audio> Slide transitions from Scheduler page to Clinic Schedule output.

Clinic Schedule 1

Again, as we saw previously, the Clinic Schedule has a Y/N to indicate if there was missed appointment follow-up.

Click the button to continue.

Kept

Kept 1

Go ahead and open the 2:30 Horse Household Appointment Details modal. Click anywhere for a hint.

<no audio> Open the 2:30 PM Horse Household Appointment Details modal. Click anywhere for a hint.

<audio – hint> Single-click on the 2:30PM Horse Household appointment block.

Kept 2

"Missed" displays in the Appointment Details header once the appointment duration has passed if Kept hasn't been toggled on.

<Transition Slide>

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

Kept 3

We can manually toggle on Kept at any time, before, during, or after the scheduled appointment.

Kept is also automatically toggled on by WINNIE when benefits are issued on the same date as an appointment.

It also toggles kept on when benefits are issued to one of the members of a two-way linked Breastfeeding Dyad.

This means it automatically toggles kept on for fully breastfed infants less than 6 months old or some-breastfeeding women more than 6 months postpartum even if not issued benefits themselves.

<Transition Slide>

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

Kept 4

An additional Kept toggle displays above the individual participant rows in the Household Appointment Details.

It allows us to toggle everyone scheduled for the appointment as Kept with one click.

It is all-or-nothing.

Go ahead and toggle on Kept for the household.

Kept 5

When we toggle it on, three things happen: all toggles in the participant rows are also toggled on, the Edit icon disappears from the Followed-up column, and "Missed" changes to "Kept" in the header.

Kept 6

If we toggle off Kept in a participant row, such as toggling off Charlie...go ahead...

<no audio> Toggle off Kept for Charlie.

Kept 7

...the household-level Kept automatically toggles off, the Followed-up Edit icon returns, and the header once again displays "Missed".

Click the button to continue.

Clinic Schedule 3

Lastly, as we saw previously, the Clinic Schedule displays Yes or No for Kept as well.

Click the button to continue.

Test Your Knowledge

T/F Q#1

We can edit, reschedule, or delete the 12:00 PM appointment for today if the current time is 12:03 PM.

Answer #1

The answer is false.

Once it is even a minute past the start time of an appointment, we are no longer able to edit, reschedule, or delete the appointment.

Multiple Choice Q#2

Which statement is false?

A. We can only add a confirmation before the scheduled appointments. Once it's in the past, we can no longer document a reminder contact.

- B. We aren't required to document a comment when either confirming an appointment or following-up a missed appointment.
- C. For Household appointments, "Missed" displays in the Appointment Details header if even one of the household members has Kept toggled off.
- D. Members of a breastfeeding dyad are automatically marked as Kept if the other member of their two-way linked dyad is issued benefits on the same date as the appointment.
- E. We can manually toggle an appointment as kept at any time.

Answer #2

The answer is A.

We can add a confirmation, or reminder contact, at any time. Followed-up can only be added once the appointment duration is in the past.

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 <u>WINNIE Questions for the State WIC Office</u> form.

Minnesota Department of Health - WIC Program, 625 Robert St N, PO BOX 64975, ST PAUL MN 55164-0975; 1-800-657-3942, <u>health.wic@state.mn.us</u>, <u>www.health.state.mn.us</u>; to obtain this information in a different format, call: 1-800-657-3942.

This institution is an equal opportunity provider.