Transfers 1A – Clinic-to-Clinic – WINNIE Online Training Module

JANUARY 2024

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is an overview of transferring participant records between clinics in WINNIE, the MN WIC Information System.

Date 1

All dates in the first section of the module are based on today's date being January 31, 2024.

<Transition Slide>

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

Change Clinic 1

Transfers occur when we open the folder of a participant who doesn't belong to either the current agency or the clinic we are working in.

Change Clinic 2

In WINNIE, when working with a participant in another clinic, as we learned in previous training modules, we can easily switch the clinic we are working in so that we don't have to transfer them.

This makes scheduling and phone services much easier.

Go ahead and change the clinic we are working in to the clinic they belong to. Click anywhere for a hint.

<audio – hint> Click the Clinic dropdown in the header.

Change Clinic 3

<no audio> Change the clinic we are working in to the clinic they belong to. Click anywhere for a hint.

<audio – hint> Select 092 - Northwest.

Change Clinic 4

Now that the Clinic in the header matches the clinic on their card, when we open the folder…

Go ahead and double-click Mel's card to open her Participant Folder…

<Waiting>

<screen description – no audio> Working…please wait and spin icon display.

Change Clinic 5

Read the alert leaving it for now and close the Alerts modal.

<no audio> Click the Close button.

Change Clinic 6

We are working in the Northwest clinic.

Return to the Search page and change the clinic we are working in back to 089 - South.

Click anywhere for hints.

<audio – hint> Click Search on the sidebar.

Change Clinic 7

<no audio> Return to the Search page and change the clinic we are working in back to 089 - South. Click anywhere for a hint.

<audio – hint> Click the Clinic dropdown in the header.

Change Clinic 8

<no audio> Return to the Search page and change the clinic we are working in back to 089 - South. Click anywhere for a hint.

<audio – hint> Select 089 – South.

Clinic Transfer 1

In general, we only need to transfer a participant to another clinic if the household's preference for location or hours changes and the family wants a different clinic to go to for on-site nutrition visits or appointments.

For instance, according to the alert we just read, we were to ask Mel Lowe if she would prefer to go to the South clinic for on-site appointments, which we did and she does.

To transfer, we open her Participant Folder while working in the clinic we want to transfer her to.

In this case, the South Clinic.

Go ahead and double-click on Mel's participant card.

<no audio> Double-click on Mel's card to open her Participant Folder.

WIC STAFF: Did you still want to start going to the clinic in…

PARTICIPANT: Oh! Yes! Thanks for asking. That's much better for us.

Clinic Transfer 2

The Confirm message asking if we are sure we want to transfer the participant displays.

If we click no…

<no audio> Click the No button.

Clinic Transfer 3

…we return to the Search page, which comes in handy when we forget to change the Clinic to the clinic we want to work in before opening the folder.

Double-click to open Mel's folder again.

Clinic Transfer 4

This time, click Yes to continue the transfer.

Clinic Transfer 5

The Transfer Participant(s) modal opens, which allows us to transfer all household members at once, keeping the clinic in sync for the family.

The agency and the clinic the household is transferring to displays at the top.

The grid provides information for each member potentially being transferred, including whether they'll be included in the transfer, their IDs, Names, Birth Dates, and the Agency and Clinic they are currently assigned to.

The Status correlates with the key shown below the grid.

Clinic Transfer 6

The grid includes all members of the household, even those no longer eligible for WIC services such as children over 5 years old, and any that are inactive and in Agency 88.

It also default selects all members.

We can toggle off Transfer…go ahead…

Clinic Transfer 7

…which toggles off everyone but the original member being transferred.

We can then individually toggle on whom we want to transfer, such as Will.

Go ahead and toggle on Will.

Clinic Transfer 8

However, since anyone transferred from Agency 88, where inactive records in the statewide database reside, is returned to Agency 88 during the End-of-Day process if no changes are made to their record, we can transfer everyone and let the system weed out those who don't need to be transferred.

Which means, in general, we can just transfer everyone as suggested by the system.

By that standard, let's toggle on transfer again.

Clinic Transfer 9

We have another chance to stop the transfer by clicking the Cancel button.

We click OK to continue the transfer process.

Click OK.

<no audio> Click the OK button.

<Waiting>

<screen description – no audio> Working…please wait and spin icon display.

Clinic Transfer 10

Since the Participant Folder is being opened, the alerts display.

This alert is no longer relevant so we should delete it.

Go ahead and delete the alert then close the Display Alerts modal.

Clinic Transfer 11

<no audio> Delete the alert then close the Display Alerts modal.

Clinic Transfer 12

<no audio> Delete the alert then close the Display Alerts modal.

Clinic Transfer 13

WINNIE automatically opens the Manage eWIC Account Household Demographics page because the clinic change must be communicated to the eWIC Processor before the transfer can be completed.

Which means we must click the Send eWIC Data button.

If we try to leave this page before clicking the Send eWIC Data button…go ahead and select another page from the sidebar…

Clinic Transfer 14

…a message displays asking if we are sure we want to cancel the transfer.

Clicking Yes stops the transfer and returns us to the Search page.

<Transition Slide>

<screen description – no audio> Slide transitions back to Confirm message on Manage eWIC Account page.

Clinic Transfer 15

We should click No to stay on this page and complete the transfer.

Go ahead and complete the transfer.

Clinic Transfer 16

<no audio> Complete the transfer.

<audio – hint> Click the Send eWIC Data button.

<Waiting>

<screen description – no audio> Working…please wait and spin icon display.

Clinic Transfer 17

When we return to the Search page…

<no audio> Select Search from the sidebar.

Clinic Transfer 18

All household members belong to the South clinic we are working in.

Click below the scroll bar to view the rest of the family.

Clinic Transfer 19

<screen description – no audio> Red box encircles South clinic for Cal, Hal, Mel, Sal, and Will.

<Transition Slide>

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

Date 2

All dates in the next section of the module are based on today's date being February 1, 2024.

<Transition Slide>

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

Return to Purge 1

Before we continue, now that it's the next day, let's search for the Lowe family again.

Go ahead and search for Household ID 13608457. Click anywhere for a hint.

<audio – hint> Click inside the Household ID field.

Return to Purge 2

<no audio> Search for Household ID 13608457. Click anywhere for a hint.

<audio – hint> Type 13608457.

Return to Purge 3

<no audio> Search for Household ID 13608457. Click anywhere for a hint.

<audio – hint> Click the Search button or press the Enter key.

Return to Purge 4

Notice that only Mel and Will display when searching within our Agency, even though we transferred the entire family to the South Clinic yesterday.

So, let's click the Household ID link in Mel's card.

Return to Purge 5

Remember when we said we should just transfer the entire family because those who belong to Agency 88 would be returned to 88 by the system during End-of-Day as long as no changes were made to their folder?

Well. There it is in black-and-white.

Go ahead and click below the scroll bar to view the rest of the household members.

Return to Purge 6

We should note that we also will see this quite often when we schedule appointments for participants that are currently in Agency 88.

If no changes are made to their folder, they will be returned to 88 during End-of-Day even once an appointment is scheduled for them.

Conclusion

This concludes our review of transfers between clinics within our agency.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

We should always transfer participants into the clinic we are working in before opening their folder or scheduling an appointment.

Answer #1

The answer is false.

One of the nicest features in WINNIE is our ability to easily change between clinics.

By selecting the clinic they belong to before working with a participant, we don't have to transfer them, which makes scheduling and phone services much easier.

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.