

# Participant Transfer History – WINNIE Online Training Module

FEBRUARY 2024

## Introduction

### Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is an overview of Participant Transfer History in WINNIE, the MN WIC Information System.

### Date 1

All dates in this module are based on today's date being February 5, 2024.

### <Transition Slide>

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

### Open Participant Transfer Hx

We can review when and where a participant has transferred from and to using the Participant Transfer History under Clinic Actions.

Go ahead and open Participant Transfer History.

<no audio> Select Participant Transfer History from the sidebar.

### Filter Required

The Search panel displays at the top and we must enter information into at least one field.

<screen description – no audio> Red mouse clicks Search button; red banner displays that reads: At least one field is required; red mouse clicks Clear button.

### Date Fields 1

The date fields allow us to search a specified date or time period.

Go ahead and select 2/1/24 for the From Date and click the Search button.

<no audio> Use the calendar control to select 2/1 for the From Date and click the Search button.

## Date Fields 2-3

<no audio> Use the calendar control to select 2/1 for the From Date and click the Search button.

## Date Fields 4

If a date is entered into one field, a date is required in the other field.

We search a specific date by entering the same date into both fields.

Select 2/1/24 for the To Date as well and click the Search button.

## Date Fields 5-6

<no audio> Use the calendar control to select 2/1 for the To Date and click the Search button.

## <Waiting>

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

## Date Fields 7

The only other validation is that the To Date cannot be a date before the From Date.

Go ahead and click three times on the From Date and type 1/1/24 into the field.

## Date Fields 8-10

<no audio> Click three times on the From Date and type 1/1/24 into the field.

## Date Fields 11

We can also press the Enter key to start the search.

Go ahead and do that.

<no audio> Press the Enter key on the keyboard.

## <Waiting>

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

## State WIC ID 1

We can search by any combination of the filters.

Click into the State WIC ID field.

## State WIC ID 2

Like other ID fields, we do not have to enter the preceding zero.

Type 1319399 into the field.

<no audio> Type 1319399 into the State WIC ID field and start the search.

## State WIC ID 3

<no audio> Type 1319399 into the State WIC ID field and start the search.

## Name Fields 1

The name fields allow letters but no numbers, as well as apostrophes, commas, periods, hyphens, and spaces.

The last name has a limit of 25 characters and the first name a limit of 20.

Click the Clear button, click into the Last Name field, type B-L-U, and start the search.

## Name Fields 2-4

<no audio> Click the Clear button, click into the Last Name field, type BLU and start the search.

## <Waiting>

The fewer the criteria, the longer it takes to search.

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

## Results 1

The Results grid populates with all transfers that have occurred statewide, between clinics or agencies, that match the criteria.

In this case, any participants with last names containing the letters B-L-U.

## Results 2

The columns include when the transfer occurred, the State WIC ID, name, where they belonged before the transfer, where they now belong after the transfer, and the staff ID of the person who completed the transfer.

## Results 3

The results are default sorted by the Transfer Date/Time.

This is indicated by the little arrow in the header.

Note that it is pointing down.

A down arrow indicates it's descending and displaying the most recent date or highest number first and goes down to the date furthest in the past or to the lowest number.

## Results 4

We can click on any of the grid headers to change the sort order.

Go ahead and click the State WIC ID header.

## Results 5

An up arrow indicates it's ascending.

We can click the header again to change its direction.

Go ahead and do that.

<no audio> Click the State WIC ID header.

## Results 6

<screen description – no audio> Descending (largest to smallest number).

The asterisk tells us the transfer occurred in our Legacy, or previous, information system.

## Results 7

We can hover over the Agency and Clinic numbers to view a tooltip that displays the agency and clinic names.

Go ahead and hover over the From Agency/Clinic then To Agency/Clinic in Chelsea Blue's row.

## Export 1

We can also export the transfer results to Excel.

Like all documents that open in WINNIE, it will be saved to the Downloads folder and will provide private data that must be deleted either automatically or manually at the end of our workday.

Click the Excel Export button.

## <Transition Slide>

<screen description – no audio> Slide transitions to Excel spreadsheet.

## Export 2

We have to double-click the Transfer Date/Time column header's right margin to be able to view the values.

Go ahead.

<no audio> Double-click the margin inside the red box.

## Export 3

The exported file is the same as the grid we were viewing, including the changes to our sort order.

## Conclusion

This concludes our review of the Participant Transfer History.

Click the button to continue.

## 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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