Notes – WINNIE Online Training Module

MARCH 2024

Introduction

Intro

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

Date

All dates in this module are based on today's date being March 18, 2024.

Overview 1

We use Notes to document permanent historical information such as certification and nutrition education information, required documentation, and as a method for providing continuity of care for participants.

<Transition Slide>

<screen description – no audio> Slide transitions to Gladys Nottmie's Demographics page.

Overview 2

We can access notes using the sidebar or the Participant Menu while in the folder.

<screen description – no audio> Slide transitions to open Participant Menu.

Overview 3

As we'll learn in the Certification modules, we can also access notes via a shortcut to the SOAP Note template while in Certification mode.

Overview 4

As well as a shortcut to a General Note from the Food Prescription page, which we'll see in the Food Prescription modules.

<screen description – no audio> Slide transitions to Food Prescription page.

<Transition Slide>

<screen description – no audio> Slide transitions back to Gladys Nottmie's Demographics page.

Open Notes 1

Go ahead and select Manage Notes from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Note Types 1

There are 4 types of notes.

System notes are automatically generated by WINNIE.

Click each button to view each type of system generated note then click the Continue button below to move on.

System-VOC

When we generate the VOC Document for participants transferring out of state, the VOC Document Produced note is generated indicating the date and time it was printed.

Click the button to continue.

System-Appt

If we have it setup on the backend to have WINNIE send automated reminder emails for scheduled appointments during End-of-Day, when the appointment notice is emailed, a system note is generated.

The Staff Member is SYSUPDATE and the note includes the type of appointment and date it was sent.

Click the button to continue.

System-Official Notification

When we provide an Official Notification, or Letter of Ineligibility, a system note is generated.

It includes when it was printed, and the termination date and reason.

Click the button to continue.

System-HR Resolution

When we remove system-assigned high risk, a High-Risk Resolution system note is generated, which includes who resolved the high-risk status and when.

Click the button to continue.

Note Types 2

The other three types are notes that we can write.

A General note and the SOAP and Breastfeeding notes, both of which have optional templates.

Filter 1

We use the Display dropdown to filter the notes in the grid below.

For instance, if we only want to see SOAP Notes, we should start by removing General Notes, which are the most common type of note.

Click the X next to General Notes in the Display dropdown.

Filter 2

And click the Search button.

Filter 3

The only other type Gladys Nottmie has is SOAP Note.

To see the General Notes again, we can re-select from the dropdown or click Reset.

Since it might not look like a dropdown, let's click that.

Filter 4

Select General Notes or press the Enter key.

Grid 1

All the notes listed in the grid belong to the participant whose folder we are currently working in.

Grid 2

The grid lists the note type, when it was written, the note topic, and the name of the staff who wrote it.

The arrow in the Created Date header indicates we can change the sort order of that column.

Click it, observe the change, then click it again to return the grid to its original sort order.

Grid 3

<no audio> Click the arrow, observe the change, then click it again to return the grid to its original sort order.

Grid 4

We select the row to view the contents of its note.

Click the Farmer's Market note's row to view it.

General Note 1

To add a General Note, we click the button. Go ahead.

General Note 2

The Subject is required.

Go ahead and click the dropdown then click below the scroll bar 2 times to view the available topics.

General Note 3-4

<no audio> Click the dropdown then click below the scroll bar 2 times to view the available topics.

General Note 5

Select Other and click into the Text field.

General Note 6

<no audio> Select Other and click into the Text field.

General Note 7

All of the free-form notes allow alphabetic, numeric, and special characters, and an unlimited number of characters.

General Note 8

We'll just type: This is a test note.

Go ahead and click Save.

<no audio> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Edit & Delete 1

Notice the Edit and Delete buttons are now enabled.

In WINNIE, we can edit and delete notes that we've written on the same date they were created.

Essentially, until End-of-Day runs for today, they are "draft" notes so that we can close the folder and return to our note later to update, revise, or delete.

We can edit or delete whether they are written while in the Participant Folder or while in Certification Mode.

This allows us to be able to return to notes, on the same date they were created, that we may not have had time to finish during an appointment.

Go ahead and click the Edit button.

Edit 1

We can select a different subject as well as…

Edit 2

…make any changes to the text we want or need to make.

Click Save.

<screen description – no audio> Note text added: We can edit our own notes on the same date that we create them.

Delete 1

Now go ahead and delete our note.

Delete 2

<no audio> Delete the note.

Edit & Delete 2

Now that the selected row is from a different date, the Edit and Delete buttons are once again disabled.

Let's take a look at the SOAP Note.

Click the Add SOAP Note button.

SOAP Note 1

Agencies can choose to document participant contacts in notes and may use the SOAP note template to assist with documenting certification, nutrition, and high-risk contacts.

The Subject is SOAP and disabled.

SOAP Note 2

Like some of the other text fields, we can drag down on the hashmarks in the corner to expand our field real estate.

SOAP Note 3

The SOAP note template automatically populates certain information.

The Subjective information, S, is blank.

Objective, O, lists all length/height/weight and blood measurements that have occurred during the most recent certification period, as well as all risk factors assigned.

Assessment, A, is blank.

Click below the internal scroll bar.

SOAP Note 4

Plan, P, lists any referrals provided during the most recent certification.

MN WIC does not populate the Default Plan portion.

SOAP Note 5

Anything automatically populated in the template can be modified or deleted, and we can add whatever appropriate text we want.

SOAP Note 6

Click the Save button.

SOAP Note 7

<Waiting> <screen description – no audio> Spin icon displays.

Just like the General Note, and this will hold true for the Breastfeeding Note as well, we can edit and delete the SOAP Note we wrote on the same date as we created it.

Full Page View 1

We can open an expanded view of the selected note using the Full Page View button.

Go ahead and click it.

<no audio> Click the Full Page View button.

Full Page View 2

Click the Close button then delete this SOAP note.

Delete SOAP 1-2

<no audio> Click the Close button then delete this SOAP note.

BF Note 1

The last type of note is the Breastfeeding Note. Click the Add button.

<no audio> Click the Add BF Note button.

BF Note 2

The message asks if we want to use the template.

If we our note type column to display Breastfeeding Note without using the template, we click No.

However, we're going to click the Yes button.

BF Note 3

The Subject is required and has the same topics as the General Note.

The template may be helpful in documenting an assessment for a young infant.

Like the SOAP Note, the template is completely modifiable.

Click below the scroll bar to view the rest of the template then click the Cancel button.

BF Note 4

<no audio> Click below the scroll bar to view the rest of the template then click the Cancel button.

Print Note 1

The last function on this page is Print Note.

Let's select the SOAP Note then click Print Note.

\<Waiting\>

\<screen description – no audio\> Spin icon displays.

Print Note 2

The note opens in another browser tab like other WINNIE documents, is a temporary file until downloaded or printed, and then it is saved to the Downloads folder.

That concludes our overview of Managing Notes.

Click the button to continue.

Knowledge Test

True/False Q#1

True or False?

We can edit or delete a note written by our co-worker as long as it on the same date it was created.

Answer #1

The answer is False.

We can edit or delete a note on the same date it is created but only if we wrote the note ourselves.

Multiple Choice Q#2

Which statement is true?

   A. We can only edit and delete General Notes.

   B. We can only edit or delete notes written while in the Participant Folder, not if during a Certification.

   C. None of the notes have character limits.

   D. We can only edit the text in a General Note, not the Subject.

   E. We have to use the SOAP note template or Breastfeeding Note template exactly as-is.

Answer #2

The answer is C.

There are no character limits when writing a General, SOAP, or Breastfeeding Note.

Corrections for other statements:

A – We can edit and delete any of the notes.

B – We can edit or delete notes regardless of whether written while in the Participant Folder or Certification Mode.

D – We can edit both the text and the Subject in a General Note.

E – Both the SOAP and Breastfeeding Note templates are completely modifiable.

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.

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

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