

Scheduler 5B – Clinic Schedule & Appointment Notice - 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 the Clinic Schedule and Appointment Notice in WINNIE, the MN WIC Information System.

Date

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

<Transition Slide>

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

Combine 1

We'll continue our review of the Clinic Schedule by take a look at the calendar.

We'll start where the last module left off, in the Household Appointment Details modal for the Lee household appointment.

Clinic 1

Appointments on the Clinic Schedule's calendar function the same way as in the Scheduler.

A single click opens the Appointment Details modal for a past appointment and we can confirm, mark as kept, follow-up, or open their participant folder.

Calendar 1A

Notice that we also close this modal by clicking anywhere outside of it.

Go ahead and click the icon to open Norma's folder.

<audio – hint> Click the blue folder to the far right in Norma's row.

Transfer Msg 1

Just like within the Scheduler, if a participant does not belong to our clinic, opening the folder will begin the transfer process.

We aren't going to transfer Norma. Click No.

<no audio> Click the No button.

Reset 4

We are still filtering our calendar. Click the Reset button.

<Waiting>

<screen description – no audio> Spin icon displays.

Calendar 2

Collapse the Scheduler panel and we'll focus on the Calendar.

<no audio> Click to collapse the Scheduler panel.

Calendar 3

Let's take a look at a future date. Select July 27th from the calendar dropdown.

Calendar 4

Let's take a look at a future date.

<no audio> Select July 27th from the calendar dropdown.

<Waiting>

<screen description – no audio> Spin icon displays.

Scroll Bar 1

Click below the internal scroll bar twice.

<no audio> Click below the internal scroll bar.

Scroll Bar 2

<no audio> Click below the internal scroll bar.

Calendar 5

Pretty much all of the functionality in the Clinic Schedule's calendar is the same as the Scheduler's calendar.

The primary differences are that we cannot change our clinic view from within the Clinic Schedule and we cannot schedule new appointments.

Calendar 6

Otherwise, this calendar has the same views, and appointments function the same within those views.

The same Refresh button ensures we are looking at the most current appointments, and we can run the same clinic schedule.

We can also change our Scheduler Configuration, which like the Scheduler, is retained only until we exit the Clinic Schedule.

We have the same click-and-drag ability as well.

Calendar 6A

For instance, notice that Rosie's 2:30 appointment is overbooked with a block.

This can only occur if the block was added after Rosie's appointment was scheduled.

Click-and-Drag 1

We'll just click-and-drag Rosie's appointment from CPA 3 who isn't available at that time to the same time in CPA 1's column.

Calendar 7

Since we are able to click-and-drag appointments on the calendar to other times or resources, as well as increasing or decreasing the length of the appointment, WINNIE can be a bit picky about our clicking.

Here's a tip.

Cursor Tip 1

If our cursor is a two-sided arrow, and our intention is to open the Appointment Details modal, we should NOT click.

If we do, we get the message asking if we want to update our appointment, and nothing happens.

If opening the Appointment Details modal, we should only click when our normal cursor displays.

Calendar 8

Like past appointments, future appointments have pretty much the same functionality as well.

A single click opens the Appointment Details modal, and we can confirm, mark as kept, open their participant folder, edit, reschedule, and delete the appointment.

Go ahead and close this modal.

<no audio> Close the Appointment Details modal.

Calendar 7

Just like in the Scheduler, we can also double-click current and future appointments to open the edit modal.

Go ahead and double-click on Rosie's appointment.

<no audio> Double-click Cheeks, Rosie's appointment.

Calendar 8

It's the same Appointment modal we saw in the Scheduler with the ability to edit all aspects of the appointment, including the Clinic, which is enabled here.

Click the Cancel button.

<Transition Slide>

<screen description – no audio> Slide transitions from Clinic Schedule to topic slide.

Reschedule in Clinic Schedule

<Transition Slide>

<screen description – no audio> Slide transitions from topic slide to Clinic Schedule.

Reschedule 1

Let's take a quick look at Reschedule.

Rescheduling appointments in the Clinic Schedule is also a little bit different because the Clinic is not available.

This means we can only use the Reschedule function to change an appointment at the **clinic we are currently working in**.

If we want to **reschedule at another clinic**, we need to use the **Scheduler** instead.

Previously, when we looked at Reschedule, we just looked at Day view.

But, if we choose to use this function, and we are a smaller agency with fewer resources scheduled, it may make more sense to look in Week view, which is where we are starting.

Reschedule 2

We're going to reschedule the More household at 12:30.

Go ahead and get us started. Click anywhere for a hint.

<no audio> Reschedule the 12:30 PM More Household appointment. Click anywhere for a hint.

<audio – hint> Single-click the 12:30 PM More Household appointment block.

PARTICIPANT: "Hi! My name is Ever More. We have an appointment on the 27th that I need to reschedule."

WIC STAFF: Sure. I can help with that.

Reschedule 3

<no audio> Reschedule the 12:30 PM More Household appointment. Click anywhere for a hint.

<audio – hint> Click the Reschedule button.

<Waiting>

<screen description – no audio> Spin icon displays.

Reschedule 4

In Reschedule mode, it retains our view but the Scheduler panel auto-collapses.

Notice that unlike in the Scheduler, a panel with a clinic dropdown does NOT display.

We can close the reschedule mode and refresh our appointments, but the Clinic Schedule is disabled.

Like in the Scheduler, the calendar is essentially locked.

Hovering over any of the appointments displays a tooltip indicating they are disabled.

Go ahead and hover over any of the appointments then click the button to continue.

Reschedule 5

We want to look at the week of August 1st.

Since that is next week, let's just click the Next (right arrow) button to the left of the calendar dropdown.

PARTICIPANT: “We are going to be out of town for a couple of days and get back on the 31st. Do you have anything on August 1st”

WIC STAFF: We should. Let me take a look.

<Waiting>

<screen description – no audio> Spin icon displays.

Reschedule 6

Whether we select the date or jump a week, it’s always going to start with Sunday of that week and display all the resources scheduled.

Click to the right of the horizontal scroll bar.

Reschedule 7

We have RD, Somali 1 and BF Peer resources so far on August 1st but we probably want to save those for other participants.

Click to the right of the horizontal scroll bar again.

Reschedule 8

CPA1 should work. Let’s reschedule for 8AM. Go ahead and do that. Click anywhere for a hint.

<no audio> Reschedule the appointment for 8AM with CPA 1. Click anywhere for a hint.

<audio – hint> Double-click the 8:00-8:15 AM time slot in the CPA 1 column.

Reschedule 9

<no audio> Reschedule the appointment for 8AM with CPA 1. Click anywhere for a hint.

<audio – hint> Click the Yes button.

Reschedule 10

Out of Reschedule mode, the Scheduler panel automatically re-expands (regardless of whether it was collapsed prior to rescheduling).

Reschedule 11

<screen description – no audio> Slide transitions from August 1st week view back to July 27th week view where More appointment has been deleted.

And, of course, the More Household appointment has been deleted from July 27th.

End Clinic Schedule

<screen description – no audio> Slide transitions from July 27th week view back to August 1st week view where the More appointment was rescheduled.

That pretty much covers it.

If we are familiar with the Scheduler, we should also be good to go using the Clinic Schedule.

Click the button to continue.

Appointment Notice

<Transition Slide>

<screen description – no audio> Slide transitions from topic slide to Clinic Schedule.

Calendar 1

We briefly looked at the Appointment Notice in the Documents Training Module and indicated we'd take a deeper dive in the Appointments modules.

So, let's take another look.

From here, go ahead and open Clay More's participant folder and then run the Appointment Notice. Click anywhere for hints.

<audio – hint> Single-click the More Household appointment block.

Open PF 1

<no audio> Open Clay More's participant folder and then run the Appointment Notice. Click anywhere for a hint.

<audio – hint> Click the blue folder at the far right of More, Clay's row.

Open Menu 1

<no audio> Open Clay More's participant folder and then run the Appointment Notice. Click anywhere for a hint.

<audio – hint> Click the Participant Menu dropdown in the far right of the header.

Run Appt Notice 1

<no audio> Open Clay More's participant folder and then run the Appointment Notice. Click anywhere for a hint.

<audio – hint> Select Generate Appointment Notice from the menu options.

<Waiting>

<screen description – no audio> It takes a couple of seconds for the document to open.

<Waiting>

<screen description – no audio> Document opens in a new tab.

Appt Notice 1

We won't reiterate the information from the Documents training.

Our focus is the appointment information this provides.

The Appointment Notice automatically, and only, prints for the next appointment scheduled and for the participant whose folder we are in when we generated it.

Appt Notice 2

It begins with the clinic and its address, the participant's name, State WIC ID, and their address.

The date the notice was generated, who and what the appointment is for, and when including date and time, and the clinic address where it is scheduled.

Appt Notice 3

A couple of things to note...

If we are going to use this for household appointments, we may want to write in other household members' names and any other types of appointments.

The notice will list the same appointment start time no matter whose folder we are in when we generate it.

Appt Notice 4

The next section provides information about what may be needed depending on the appointment.

Again, for a household, if Clay and Manny are just Follow-up appointments, but Ever is a new pregnant certification, we may want to indicate that this section applies only to Ever.

Appt Notice 5

The section after that lets them know that if measurements are required, we may be able to use referral information provided by their health care provider.

Appt Notice 6

Next, a reminder about how busy clinics can be.

Click the button when ready to continue.

Appt Notice 7

And lastly, a request to cancel in advance if the appointment can't be kept.

As we noted in the Documents training, it concludes with the Non-Discrimination Statement, which is required by FNS.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or false?

Double-clicking a future appointment in the Clinic Schedule opens the modal where we can edit all aspects of the appointment, including the Clinic it's scheduled at.

Answer #1

The answer is true.

Just like in the Scheduler, we can double-click future appointments to open the modal that allows us to edit everything about the appointment, including the Clinic where it is scheduled.

Multiple Choice Q#2

What are the two primary differences between the Scheduler and Clinic Schedule?

- A. We cannot reschedule or edit appointments within the Clinic Schedule.
- B. We cannot click-and-drag appointments to new locations, nor can we click-and-drag to change the duration, in the Clinic Schedule.
- C. We cannot Refresh, and can only filter, in the Clinic Schedule.
- D. We cannot change the clinic we are viewing and cannot schedule new appointments within the Clinic Schedule.
- E. We cannot change our Scheduler Configuration, nor can we change our view from Day, in the Clinic Schedule.

Answer #2

The answer is D.

The Clinic in the Clinic Schedule is disabled and cannot be changed, and we cannot schedule new appointments in the Clinic Schedule, only the Scheduler.

Explanations for other answers:

A – We can reschedule and edit appointments in the Clinic Schedule.

B – We can click-and-drag appointments to new resources, days, and times, as well as click-and-drag to extend or shorten the appointment.

C – We can Refresh the Clinic Schedule and can also filter appointments in the Scheduler.

E – We can change our Scheduler Configuration, and our view to Week or Month, in the Clinic Schedule.

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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