

Participant Search 1 – WINNIE Online Training Module

FEBRUARY 2023

Introduction

Intro

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

Navigation

<Transition Slide>

<screen description – no audio> Slide transitions from topic slide to Module Launcher page.

Clinic Services

Clicking Clinic Services on the Module Launcher page...

<no audio> Click on Clinic Services.

Hamburger Icon

...opens the Participant Search page.

All navigation panes, or sidebars, work the same in WINNIE.

If we hover our mouse over the icon of 3 parallel lines, also sometimes called a hamburger icon...

<no audio> Hover over the hamburger icon.

Click the button to continue.

Toggle Sidebar

...the tooltip shows it's the Toggle Sidebar icon.

If we click the icon...

<no audio> Click the Toggle Sidebar icon.

Collapse Sidebar

...it collapses the sidebar and only displays icons, providing us with more screen real estate.

Icon Tooltips

Hovering over each icon displays the tool tips. Go ahead and do that.

Click the button to continue.

<screen description – no audio> Tool tips displays for Participant List, Search, Clinic Actions, Create New Household, Documents, Locked Households, Participant Transfer History, Potential Duplicate Participants, Work with On-site Group, Calendar and Clinic Schedule.

Stay Collapsed

Once we've collapsed the sidebar, the sidebar remains that way until we re-expand it.

<screen description – no audio> The screen transitions from the Search page to the Demographics page of the Participant Folder where the sidebar remains collapsed.

Collapsed in PF

For instance, when we open and close participant folders.

<Transition Slide>

<screen description – no audio> The screen transitions from the Demographics page of the Participant Folder to the Search page where the sidebar remains collapsed.

Sidebar Sections

The down arrow icons collapse the individual sections.

Click the Clinic Actions down arrow.

Expand Sidebar

Now let's click the Toggle Sidebar icon.

<screen description – no audio> The sidebar re-expands with icons and descriptive text but the Participant List section remains collapsed.

Long Sidebars

Notice that the Clinic Actions section remains closed until we choose to re-expand it.

This may come in handy inside the participant folder where the sidebars are a lot longer.

<screen description – no audio> The screen transitions from the Search page to the Demographics page of the Participant Folder where the sidebar is much longer.

Re-Expand Section in PF

Go ahead and click the icon to re-expand the Clinic Actions section.

<no audio> Click the arrow icon in the Clinic Actions section header.

Long Sidebars 1

Click the button to Continue.

Sidebar Options

There are three distinct sections: Participant List, Clinic Actions, and Calendar.

We should note that only those actions available to us based on our role will display in the sidebar.

For instance, only the WINNIE AGENCY ADMIN role will see the Potential Duplicate Participants, which allows us to identify and correct duplicate records.

All of these actions, including the Clinic Schedule, will be reviewed in other training modules.

<Transition Slide>

<screen description – no audio> Screen transitions to display the browser tab, URL address line and favorites bar, as well as the Participant Search page.

Page Navigation

Although it's typical to use the back arrow next to the URL in the browser, all of our navigation within WINNIE should occur by clicking an option on the sidebar or using the Toggle Applications icon.

The browser's back arrow should never be used to navigate between pages in WINNIE.

<Transition Slide>

<screen description – no audio> Screen transitions back to just the Participant Search page (without browser tabs, etc.).

<Transition Slide>

<screen description – no audio> Screen transitions to topic slide from Participant Search page.

Agency & Clinic

<Transition Slide>

<screen description – no audio> Screen transitions from topic slide to Participant Search page.

Agency/Clinic Dropdowns

At the top of our Search page, the Agency and Clinic we are currently working in displays at the top of our Search page.

This is based on the selection we made in the Location modal when we logged in.

If we have access to more than one agency, the Agency list will be a dropdown like the Clinic.

Click the Clinic drop-down.

Clinic Dropdown

The clinics we have access to display in the list.

We can easily switch to working in another agency/clinic simply by selecting from the dropdowns.

Select the Northpoint clinic.

New Clinic

We are now working in the Northpoint clinic.

This makes same-day scheduling and phone services much easier.

Instead of transferring a participant to our current clinic, we can easily select the clinic where they currently belong.

<Transition Slide>

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

Participant Search

<Transition Slide>

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

Search Databases

There are different pockets of the database that we can search: Appointments, On-Site, Clinic, Agency, and Statewide.

The default can be assigned based on each individual user, but for most, it's Agency.

All of these lists, except for Statewide, are dependent on the Agency and Clinic we are currently working in.

Appts & On-Site DB

Appointments and On-Site are daily lists and do not require any other search criteria.

To see the Northpoint lists, we simply click Appointments or On-Site and then the Search button.

Let's do that.

Click the Appointments button.

Search Appts

Click the Search button.

Appts DB

This is a list of all participants with an appointment scheduled **today** at the clinic we are currently working in.

We can find participants with appointments at other clinics simply by selecting that clinic from the dropdown and clicking the Search button again.

Go ahead and search Appointments for Clinic 206 - IOCP.

Click anywhere for a hint.

<hint – audio> Click the Clinic dropdown.

Change Clinic

<hint – audio> Select Clinic 206 – IOCP.

Search New Clinic

<hint – audio> Click the Search button.

New Appts List

This is our list of participants with appointments scheduled for today at IOCP.

Match

When there are participants that match our search criteria, a card displays in the Results grid for each.

The card format is more accessible and can be read by screen readers, a requirement for the WINNIE software.

Bar Colors

The colored bars on the card's left margin are a visual indicator of the WIC Category.

For example, the bar is orange for all non-breastfeeding women participants.

No Matches

If there aren't any participants that meet our search criteria, a message displays indicating this.

<screen description – no audio> The screen transitions from the search results to a blue banner that reads: No results found for the specified search criteria.

<Transition Slide>

<screen description – no audio> The screen transitions from the "no results found" banner back to the results for the Appointments search in the 206-IOCP clinic.

Default Sort Scroll

If there are multiple cards in our search results, they default display in ascending alphabetical order by last name, then first name.

<screen description – no audio> Screen scrolls down through cards in alphabetical order: Bear, Bull, Catt, Dog, and Horse.

Sort Order

We can change the sort by clicking the Sort Order dropdown and selecting one of the options.

Let's select WIC Category.

Click the Sort Order dropdown.

Change Sort

Select WIC Category.

New Sort Scroll

The list is now sorted in alphabetical order by Category, starting with Breastfeeding and ending with Pregnant.

Descend

Toggling on Descending will change the direction of the sort.

<no audio> Toggle on Descending.

Card Headers

<Pause for circles around Pregnant than Non-Breastfeeding.>

The card provides general information about each participant.

The card header lists the last name, first name and State WIC ID.

All categories display the participant's age in years (if applicable), months and days.

However, if Pregnant, the number of weeks and days gestation displays if there is a valid LMP Start Date linked to a current certification record.

Their current agency and clinic also display in the card header.

Cards

Inside the card is their date of birth, WIC Category, Household ID, Gender, Authorized Rep's Name and whether they are on-site or checked in for the day.

Card Icons

There are also five icons. Go ahead and hover over them then click the Continue button.

<screen description – no audio> Hover of folder icon: Open Folder; hover over person in house icon: Add New Member; hover over thumbprint icon: Initial Contact; hover over calendar icon: Open Scheduler; hover over toggle: Toggle Participant On-Site.

Icon Training

Just FYI... we will only address the Toggle Participant On-Site icon in the Participant Search training modules.

Card & HHID

The card also has a quick link to search for all other members of a participant's household.

Go ahead and click the Household ID in Arya's card.

<no audio> Click the Household ID link.

Card & HHID 1

The system retains our change in sort order but changes our Search Criteria to Household ID and Statewide since statewide is where any other household members that currently don't belong to the same agency would be found.

Icons Change

A couple things to notice:

The calendar icon no longer displays in the card.

This is because this icon directly opens the Appointment Scheduler within the participant folder and does not have any mechanism for transferring the participant to our agency first.

Also, a new toggle displays in the Results header.

Go ahead and hover over it then toggle it on.

<screen description – no audio> Tooltip upon hover: Toggle Household On-Site.

<no audio> Hover over the toggle to view the tooltip then toggle it on.

Toggle HH On-Site

Toggle On-Site provides a way for us to “check in” a participant, or members of a household, to **our clinic** and adds them to our clinic's On-Site list.

Toggle HH On-Site 1

It is clinic-specific, so participants must **belong** to our clinic to be added to the on-site list.

However, WINNIE will allow us to check in any participant in our search results but only those that belong to our clinic will be added to our current clinic's on-site list.

Agencies can choose to use this feature to help manage in-person clinic flow.

Date and Time

Once toggled on-site, the participant card displays the date and time we checked them in.

Household Toggle

Toggle Household On-Site only displays after searching by household ID and, as we just saw, allows us check in all members of the household with one click.

The toggle on the participant card provides a way for us to check in participants individually or remove a member toggled on with the rest of the household that shouldn't be.

For instance, if only Arya and Teddy are in clinic today, we could toggle off Harry.

Let's do that.

Click below the scroll bar.

Remove HH Mbr

And click the toggle in Harry's participant card.

HH Toggle Off

Once an individual member is toggled off, the On-site date and time clear and WINNIE automatically toggles off the Household toggle.

On-Site List

As we mentioned before, like Appointments, the On-Site clinic-specific list doesn't require any other search criteria.

Since our criteria is currently Statewide and Household ID, we need to clear it before selecting On-site.

Click the Clear button.

Clear Button

The Clear button removes previous search criteria and results and resets the search to its default settings.

Now click the On-Site button.

Search On-Site

And click the Search button.

On-Site List

The On-Site list includes everyone we've checked in...

Click below the scrollbar...

Others On-Site

...as well as any other participants checked in by other staff working at our clinic.

Participants are removed from the On-site list automatically when benefits are issued.

Any remaining participants are removed as part of End-of-Day each night.

We can also manually remove them ourselves.

For instance, if we wanted to use this list to ensure participants are served in the order they arrived, once a staff person is available to see them, that staff person could remove them from this list.

To do that, we turn the toggle off.

Let's say we can see Arya and Teddy.

Toggle Off

We simply toggle off Arya then Teddy.

<no audio> Toggle On-Site off in Arya's card.

Toggle Off 1

<no audio> Toggle On-Site off in Teddy's card.

Re-Search On-Site

If we want to verify they are no longer listed, we just click Search again.

<no audio> Click the Search button.

Clear Again

As expected, just Charlie and Clyde-Dale are left on the list.

Click the **Clear** button.

Other Searches

Clinic, Agency, and Statewide searches all require at least one criterion.

Clinic will search all participant records that belong to the clinic we are working in.

Agency will search all participant records that belong to any of the clinics linked to the agency we are working in.

The statewide searches for all participants assigned to **any** agency, including inactive participant records that have been purged from their previously assigned agency after 6 months of inactivity.

These inactive participant records belong to Agency 88 and can **only** be found in statewide.

Go ahead and click the Statewide button.

Agency Dropdown

When we select Statewide the Agency dropdown displays.

This is a list of all MN WIC agencies and its use is optional.

Go ahead and click the Agency dropdown.

Another Agency

Select 021 – ANOKA COUNTY HEALTH & ENVIRONMENTAL SERVICES.

Search Other Agency

Click the Search button.

Other Agency Results

The dropdown allows us to search for participants that belong to a specific agency different from our own.

It's one way to get faster search results because the system only searches participant records that belong to that agency instead of having to search all the records in the database.

Use-Case

Here's a use-case: We may want to use this if a participant is transferring from another agency to ours and we know where they are transferring from but don't have information specific to them, such as State WIC ID, Household ID or Card Number.

Notice that these fields, which are specific to a participant or a household, are disabled.

Click the Clear button again.

Test Your Knowledge

Multiple Choice Q#1 (multi-select)

Multiple Choice – select all that apply

Agency 88...

- A. Contains all existing participant records.
- B. Contains participants purged from local agencies.
- C. Is only searched when searching Statewide.
- D. Contains inactive participant records.
- E. Is the Agency searched when we select the Agency button.

Answer #1

The answers are B, C, and D.

Agency 88 contains all inactive participants that have been purged from local agencies and can only be found when searching the Statewide database.

T/F Q#2

True or False?

We can toggle any participant on-site, but only those who belong to our clinic will display in our on-site list.

Answer #2

The answer is True.

We can toggle on-site participants that belong to another agency, including 88, but they will not display in our clinic's on-site list.

T/F Q#3

True or False?

It's OK to use the browser back arrow to navigate through WINNIE.

Answer #3

The answer is False.

Only the sidebars and Toggle Application icon should be used to navigate in WINNIE. We should never use the browser back arrow.

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.

PARTICIPANT SEARCH 1

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