Maintaining Referrals – WINNIE Online Agency Admin Training Module

OCTOBER 2024

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It is an overview of how to maintain agency-level referrals in WINNIE, the MN WIC Information System.

Date 1

All dates in this module are based on today's date being October 28, 2024.

<Transition Slide>

<screen description – no audio> Slide transitions to Referrals page for Robin Banks.

Overview

Overview 1

In this module, we will review how to maintain referrals in Agency Administration.

Referrals that we want to be able to provide to our participants and Referral Topics, which is the category the referral can be found under.

Go ahead and return us to the Module Launcher page.

<audio hint> Click on Clinic Services in the header.

Role 1

Maintenance of referrals is an Agency Admin role, and we must have WINNIE Agency Admin role 10.

When we have this role, we will see the Agency Administration button on the Module Launcher.

Go ahead and click it.

<no audio> Click the Agency Administration button.

Sidebar 1

We maintain referrals in two places under community resources, Referral Topics and Referrals.

We're going to start with Referrals. Select that from the sidebar.

<no audio> Select Referrals from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Agency

Agency 1

The Agency defaults to what we selected on the Locations modal when logging in or the agency we are currently working in while in Clinic Services.

Agency 2

If we have access to more than one agency, the Agency is a dropdown so that we can select to work in another agency without exiting this page.

It is a read-only header if we only have access to one agency.

Referrals Grid

Grid 1

The Referrals page opens and auto-populates with an alphabetical list of all existing referrals already created for the agency we are currently working in.

Grid 2

The Referrals grid has only 2 columns: Name and the Active toggle, which indicates whether it'll display in Clinic Services.

Sort Order 1

We can change the list to sort by either Name or the Active toggle by clicking on the header.

Go ahead and click the Active header.

<no audio> Click the Active column header to change the sort order.

Sort Order 2

It's either/or.

Go ahead and click on the Name header.

<no audio> Click the Name column header to change the sort order.

Adding Referrals

Add 1

We can add new referrals.

Before adding referrals, best practice is to scroll through our list to ensure the referral we want to add doesn't already exist and note if it does.

We know this one is new, so go ahead and click the Add button.

Add 2

The Referral modal opens.

The Name, Address, City, State, Zip Code, and Primary Telephone number are required.

Notice the County isn't.

Go ahead and click that dropdown.

<no audio> Click the County dropdown.

County 1

A few things to note.

All counties in Minnesota are listed.

We can click the blank space to de-select a previously selected county, and we have an option of Any County.

Since we're here, let's select Hennepin.

Click below the scroll bar and do that.

County 2

<no audio> Select Hennepin.

Name 1

The Name field has a max of 50 characters and allows letters, numbers, and special characters.

Unlike the referrals previously added in the Legacy system, WINNIE does not force uppercase.

If we want our referrals to display in a consistent format, such as all caps, we will need to type it using all caps.

Name 2

There are a couple of formatting rules that we should follow.

First, all referrals must have our 3-digit Agency ID within a set of parentheses at the end of the name.

Even though our referrals are agency-specific in WINNIE, they weren't in Legacy, so all our ad-hoc reports use the Agency ID in the name to identify referrals assigned to our participants.

Because of this we must continue to use that format in WINNIE.

Name 3

Second formatting rule.

Every referral should have a unique name.

This allows us to add the same referral to more than one category.

We can do this either by adding the category as part of the name, or because of being limited to only 50 characters, we can just add a number, such as 1 or 2 at the end of the name.

The system does not enforce these formatting rules, so it is up to us to ensure we follow them.

Go ahead and click into the Name field.

Name 4

Our new referral is 24-HOUR HOMELESS HELPLINE (241).

Let's type that in all caps as shown and adding our Agency ID, 241, inside a set of parentheses.

<no audio> Type 24-HOUR HOMELESS HELPLINE (241) in all capitals in the Name field.

<no audio – hint> Type 24, hyphen, HOUR, space, HOMELESS, space, HELPLINE, space, open parentheses, 241, close parentheses.

Address 1

Obviously, if the referral has a site address, we will want to enter that.

However, we have other options if the referral doesn't have a physical site address.

If we have a web address, we could enter the URL.

If it’s just a phone line, we could use our agency’s main site address, or we can simply type “NO ADDRESS”.

As always, we should follow our agency’s format.

We only have a telephone number for this helpline.

Go ahead and click into the Address field and type “NO ADDRESS” using all caps.

Address 2

<no audio> Click into the Address field and type NO ADDRESS in all capitals.

City 1

If no address, then for the city, we can use the city where our main agency site is located.

Click into the City field and type MINNEAPOLIS in all caps.

<no audio> Click into the City field and type MINNEAPOLIS in all capitals.

City 2

<no audio> Click into the City field and type MINNEAPOLIS in all capitals.

State 1

Go ahead and click the State dropdown.

State 2

Since it could be out-of-state, we can select any state.

No address, we select our state.

Click below the scrollbar then select Minnesota.

State 3

<no audio> Select Minnesota.

Zip Code 1

For the zip code, we also have the option of entering 5 zeroes.

Let’s do that.

Click into the Zip Code field and type 5 zeroes.

<no audio> Click into the Zip Code field and type: 00000

Zip Code 2

<no audio> Click into the Zip Code field and type: 00000

Contact Name 1

The Contact Name is optional.

It has a limit of 50 characters and accepts letters, numbers, and apostrophes, commas, periods, and hyphens.

Email 1

Email is also optional.

If an email is entered, it will verify it's an acceptable email format with an at sign.

It allows 64 characters before and 63 after the at sign, as well as 63 more after a period.

The field accepts letters, numbers, and hyphens, periods, and underscores, as well as one at sign.

Telephone 1

We have to enter a telephone number, and again, this may not be something we have, so an option is to enter all zeroes.

This is a helpline, so click into the field and type 6121234567.

<no audio> Click into the Primary Telephone field and type: 6121234567.

Telephone 2

<no audio> Click into the Primary Telephone field and type: 6121234567.

Telephone 3

The Secondary Telephone is optional.

Active 1

When the Active toggle is on, as is the default, the referral once assigned to a Referral Topic will display in the Referrals dropdown in the participant folder.

Go ahead and save our new referral.

<no audio> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Editing Referrals

Edit 1

We can edit any of the referrals by either selecting the row and clicking the Edit button or by double-clicking the row.

Edit 2

Let’s remove the hyphen between 24 and hour so that it follows the same format as the other 24-hour referrals.

Double-click our new referral to edit it.

<no audio> Double-click the 24-HOUR HOMELESS HELPLINE row.

Edit 3

We can update any of the fields when editing.

Double-click the hyphen, hit the space key, then save.

<no audio> Double-click the hyphen, press the space key on the keyboard, then click the Save button.

Edit 4-5

<no audio> Double-click the hyphen, press the space key on the keyboard, then click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Deleting Referrals

Delete 1

Like other Agency Admin data, we can only delete referrals if they aren’t already associated with a participant record.

<Transition Slide>

<screen description – no audio> Slide transitions back to Referrals page.

Inactivate Referrals

Inactive 1

Before we move on, let's also make a referral inactive.

Go to page 3.

<no audio> Click page 3.

Inactive 2

Since referrals aren't required to complete a certification, we are going to make NO REFERRAL NEEDED inactive.

Double-clicking the row to edit, go ahead and do that.

<no audio> Double-clicking the row to edit, make NO REFERRAL NEEDED inactive.

Inactive 3

<no audio> Double-clicking the row to edit, make NO REFERRAL NEEDED inactive.

<audio – hint> Toggle off Active.

Inactive 4

<no audio> Double-clicking the row to edit, make NO REFERRAL NEEDED inactive.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Referral Topics

Topics 1

The second part of adding referrals is assigning it to a category or a referral topic.

Go ahead and select that from the sidebar.

<no audio> Select Referral Topics form the sidebar.

<Waiting>

It may take a moment for the list to resolve.

Topics Grid

Topics Grid 1

The Referral Topics page displays all of our agency's existing Referral Topics in alphabetical order.

We can either click on the topic label or the accordion toggle to expand the row.

Go ahead and do one or the other, expanding the Homeless/Shelters topic.

<no audio> Click on Homeless/Shelters or the accordion toggle in that row to expand it.

Topics Grid 2

Click below the scroll bar.

Topics Grid 3

The referrals we've assigned to this category are listed alphabetically along with their Active status.

Each topic should house a set of unique referrals.

This grid is read-only except for changing the sort order by clicking the headers.

We have to return to Referrals to make changes to the referral itself.

Editing Topics

Edit Topics 1

The Edit and Delete buttons affect the Referral Topic.

Go ahead and click the Edit button.

Edit Topics 2

The only thing we can edit is what we called the topic.

Since topics are associated with participant records, best practice is to never change the meaning of the topic when editing.

Let's add "and Helplines" to our topic. This time using sentence case.

<no audio> Add "and Helplines" to the topic using sentence case.

Edit Topics 3

And save our new topic name.

<no audio> Click the Save button.

Modify Referrals under Topics

Modify 1

We click Modify to add or remove referrals from the topic.

Click the Modify button.

Modify 2

The Modify Referrals modal opens listing the referrals that were in the grid.

We click the x next to a specific referral to remove it from this topic.

We click the x in the bottom right corner to remove all the referrals from this topic.

We click inside the field, or use hot keys, to open the Referrals list to add referrals.

Go ahead and click inside the field.

Modify 3

All referrals that aren't already assigned to **this specific** topic are in the list.

But remember, all referrals must be unique, and the same exact referral should never be assigned to more than one topic.

We are adding our new referral.

Go ahead and select 24 HOUR HOMELESS HELPLINE then save.

<no audio> Select 24 HOUR HOMELESS HELPLINE then click the Save button.

Modify 4

<no audio> Select 24 HOUR HOMELESS HELPLINE then click the Save button.

No Show Topics

Topics 2

Let's take a look at a couple more things.

Expand No Referral Needed.

Topics 3

Click below the scrollbar.

Topics 4

NO REFERRAL NEEDED is inactive.

But we don't need to delete the referral for this category not to display in clinic, which we'll see in a minute.

Next, click above the scroll bar.

Topics 5

Expand the second Food and Nutrition Programs listed.

Deleting Topics

Delete 1

This was obviously a duplicate and all of the referrals have been removed.

Do you think we can delete it?

Go ahead and try.

<no audio> Try to delete the Food and Nutrition Programs topic.

Delete 2

<no audio> Try to delete the Food and Nutrition Programs topic.

Delete 3

Like we saw with Referrals, we can only delete a topic if it's never been associated with a participant record.

Click the OK button.

Adding Topics

Add Topics 1

As we'll see in a minute, this topic won't show in clinic referrals either.

Lastly, we can create new topics.

Click the Add Referral Topic button.

Add Topics 2

The topic Description has a limit of 50 characters and accepts letters, numbers, and all special characters.

One caveat, Referral Topics have to be selected before adding referrals in WINNIE.

The more topics we have, the more users may have to click to select their referrals.

And on that thought…

Click the Cancel button.

Clinic Referrals

<Transition Slide>

<screen description – no audio> Slide transitions back to Robin Banks’ Referrals page.

Let’s return to Robin Banks’ Referral page in Clinic.

Clinic 1

We should see our changes immediately in clinic.

Go ahead and click the Modify button.

Clinic 2

Click the Referral Topics dropdown.

Clinic 3

Notice the empty Food and Nutrition Program doesn’t display.

Click below the scroll bar.

Clinic 4

Nor does the No Referral Needed that only had an inactive referral listed.

Our revised topic displays.

And if we select it…

<no audio> Select Homeless/Shelters and Helplines.

Clinic 5

Then click the Referrals dropdown…

Clinic 6

…we can see our new referral.

End Slide 1

That is all there is to maintaining referrals in WINNIE.

Click the button to continue.

Knowledge Test

True/False Q#1

True or false?

Since referrals are agency-specific in WINNIE, adding our Agency ID in parentheses at the end of the Referral Name is optional.

Answer #1

The answer is False.

Although referrals **are** agency-specific in WINNIE, the Agency ID at the end of the referral name is used to identify the agency a referral belongs to in all Infoview referral ad-hoc reports, so we still must always add the Agency ID in parentheses at the end of the referral name.

End

End Slide 2

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.*