

Certification Guided Script (CGS) Overview Script

Intro

This HuBERT on-demand training module...

Intro1

...is provided by the MN Department of Health WIC Program. It provides an overview of the Certification Guided Script, or CGS.

Starting the CGS

PreCGS

The Certification Guided Script, or CGS, is where we determine an applicant's or participant's eligibility for the WIC Program.

If a participant comes to WIC for a certification, any changes to the participant's information should be made in the Guided Script and not the participant folder.

For some information, we can only enter one record per day. If the record is required to complete the certification, it must be entered into the CGS, otherwise we have to do a work-around.

Work-arounds will be explained as necessary in their appropriate training modules...

PreCGS1

... but if we always remember to enter our changes into the CGS and not the participant folder, we won't have to worry about them.

OpenCGS

The CGS can only be opened from within a participant's folder...

...using the **Certification** icon or by selecting the option in the **Certification** menu.

There are a couple of different messages that may display before the CGS opens.

Recertifications for existing participants cannot be started until 45 days before the end of their current certification period.

If benefits are still available for the participant, we can choose to exit the process to open the CGS.

Transition Slide

<transition to woman’s folder>

OpenCGS1

If the participant is a woman who has been on WIC before, we will need to indicate what type of certification we are starting, and if postpartum, whether she was on WIC in MN during her pregnancy (we’ll learn more about this message in the Health Information modules).

Transition Slide

<transition to back to child’s folder>

OpenCGS2

<no audio> Click the **Certification** icon.

Lastly, we may get the “Are you sure?” message to verify we want to start a certification. Go ahead and click the **Yes** button.

<no audio> Click the **Yes** button.

OpenCGS3

We should note that like participant folders, we can open more than one CGS at a time...

OpenCGS4

<slide transition to display taskbar with multiple buttons>

...and buttons for each open screen display on the task bar.

Immunizations

No Immunization Info

Although the Immunizations link is active in infant and children’s CGS, we do not collect immunization information in HuBERT and nor do we have the permissions necessary to complete the screen.

The Event Log

The CGS is comprised of different sections that are similar to the tabs in the Participant Folder.

Some of the sections are required to complete the CGS.

The **Event Log – Review Certification for Errors** tells us what needs to be completed.

Go ahead and click the icon.

<no audio> Click the **Event Log** icon.

It will also automatically display if we try to end the certification without completing all the required sections.

<no audio – circle required information>

<no audio> Click the **Close** button.

Closing CGS during Cert

CloseCGS

Since a risk factor was auto-assigned by the system, risk factors weren't listed in the event log, but all participants also require at least one risk factor to complete a certification.

We can close the CGS, without ending the cert process, at any time.

For example, this may be necessary for Separation of Duties whereby one staff person starts the CGS and documents income while another completes it.

It is important to remember that only one staff person should ever be in a particular Participant Folder and/or CGS at one time.

If we need to close the CGS we can do so by clicking the X in the right corner, selecting **Close Certification** from the Guided Script menu, or clicking the **Close Certification** icon.

Go ahead and click the icon.

<no audio> Click the **Close Certification** icon.

PFlock

Whenever we close a guided script, the participant folder locks. This means all of the fields are disabled and we cannot make any changes to the participant folder.

We can unlock the folder by either completing the CGS or by removing the incomplete certification, which basically deletes any record that the CGS was ever started.

There are some instances, such as if we were to have started the CGS for the wrong participant, when we may have to use the remove incomplete cert function.

Removing Incomplete Certs

RemoveCert

The Remove Incomplete Cert function is found in the Certification menu.

<no audio> Click the **Certification** menu.

RemoveCertA

The option is enabled because we closed out of a CGS.

<no audio> Select **Remove Incomplete Certification**.

RemoveCert1

The message indicates that any information entered into the CGS will be permanently removed.

We aren't actually going to remove the cert, so click **No**.

And re-open the CGS.

<no audio> Click the **No** button.

Reopen CGS

<no audio> Click the **Certification** icon.

The CGS Screen

CGS

The sections of the CGS are a checklist of sorts.

In general, it's best practice to complete them in the order they are displayed since some sections may be dependent on information entered into others.

Let's open Demographics.

<no audio> Click on the **Demographics** link.

CGS1

We are going to complete the required information, except for income.

Let's save our changes by clicking OK.

<no audio> Click the **OK** button.

CGS1A

So, the Demographics section now has a checkmark.

But keep in mind that this is not necessarily a reliable indicator that we've completed that section especially considering we didn't enter income information, which is required to complete the CGS. It just lets us know that some information in that section has been saved.

HHMbrInfo

As risk factors are assigned they are listed in the **Household Member Information** section. If a high-risk risk factor is added, the High Risk column displays a Y and the checkbox, which is always disabled, is auto-selected by the system.

The **Issuance** defaults to tri-monthly, which can be changed in the **CPA Determined Follow-up** screen.

Let's click that link.

<no audio> Click the **CPA-determined Follow-up** link.

<no audio> Click the **Issuance Frequency** drop-down arrow.

CPA FU

This allows us to limit the number of months HuBERT will automatically suggest benefits for.

Generally, we don't change this unless we want to make sure that Izzy is always issued only one or two months of benefits.

Go ahead and cancel out of this.

<no audio> Click the drop-down arrow to close the list.

<no audio> Click the **Cancel** button.

Icons

We'll be going through each section of the CGS in different modules, so the only other thing to note on this screen is that we can write alerts and notes while in the CGS.

We are just going to quickly finish entering the required information for Izzy's cert...

End Cert Process

EndCGS

There are two ways to end the cert process: Click the **End Certification Process** icon or click the **Issue Benefits** link.

Both will ensure that all required components of the CGS have been completed.

EndCGS1

If something's been missed, the Event Log will open to inform us.

<no audio> Click the **Close** button.

EndCGS2

If we were certifying more than one household member, such as both Izzy and Ima, we would generally go back and forth between the CGSs completing each section for one than the other.

EndCGS2A

<Izzy and Ima's CGS screens alternate>

End CGS2B

In this case, we would use the **End Cert** icon to end the first cert and the **Issue Benefits** link to end the second, or last, household cert.

Let's do this.

EndCGS3

We're going to use the **End Certification** icon to end Izzy's CGS.

<no audio> Click the **End Certification** icon.

If everything required has been completed, the "Certification information is correct" message displays.

<no audio> Click **OK**.

The **Applicant is Certified** message displays next.

HuBERT calculates the highest applicable **priority** based on the WIC category and assigned risk factors.

It also calculates the participant's cert end date.

These are the standard cert lengths: infants, children and breastfeeding women are certified for one year, non-breastfeeding women for 6 months, and pregnant women until their baby is born. However, it's not as cut-and-dried as all that.

CertEnd

Everyone's certification ends on the last date of the month through which they are certified.

CertEndInfant

Infants are certified until the last date of the month in which their first birthday falls.

CertEndInfant6

If they are certified after 6 months of age, then they are certified for only 6 months.

CertEnd5YO

Children turning 5 years old during their certification period are certified until the last date of the month in which their 5th birthday falls.

CertEndBF

Breastfeeding women are certified until the last date of the month in which their baby turns one-year old.

CertEndBF1

If they stop breastfeeding any time after 6 months postpartum, their certification ends.

CertEndNBF

Non-breastfeeding women are certified until the last date of the month in which their infant turns 6 months old.

CertEndPg

Pregnant women are certified until their Expected Delivery Date + 6 weeks, which is then extended to the end of the month.

EndCGS4

The **Schedule Appointment** is default-selected.

If we needed to schedule a follow-up appointment, we may want to keep this checkbox selected so that the Schedule Appointments screen automatically opens during our end cert process.

EndCGS5

We aren't going to schedule a follow-up at this time so let's click the checkbox to remove the checkmark.

<no audio> Click the **Schedule Appointment** checkbox.

The **Generate Certification Notice** checkbox is also default-selected.

If we were to keep this checkmark, a Certification Notice would be immediately sent to the printer once we clicked OK on the message.

CertNotice

However, we only print the Certification Notice when the participant does **NOT** have proof of income, identity or residency and needs to **sign a waiver**.

Signing the waiver indicates that the participant is currently in a situation whereby they are unable to provide proof. Some examples might be: fire, theft, disaster, migrancy, homeless or another individual is obstructing them from providing the proof.

The participant should select the type of proof they unable to provide and indicate why.

This document should then be scanned into the appropriate member's participant folder.

More information can be found in MN Operations Manual, or MOM, section 5.2.

EndCGS6

So, let's remove this checkmark also.

<no audio> Click the **Generate Certification Notice** checkbox.

Now we can click **OK** on this message.

<no audio> Click the OK button.

CapSig

The next step is to capture the participant's or proxy's signature, which indicates they have read and understand the Rights and Responsibilities statement.

R&R

<no audio> Click when ready to continue.

CapSig1

Regardless of the number of household members being certified, the participant or proxy only has to sign once.

The **Cancel** button is necessary if for some reason we don't have a signature pad connected to our computer.

However, if we cancel out of this screen, we cannot re-open it and will have to have the participant or proxy sign the **WIC Household Manual Certification Register**, which is available on the MDH WIC Website's WIC Tools page in the HuBERT Forms section.

If we are unable to capture our signature, we would also have to sign it.

Note that after completing the form, we will have to scan it into the Participant Folder for each household member listed on the form.

<no audio> Click when ready to continue.

CapSig2

The **Capture Electronic Signature** button initializes the signature pad.

<no audio> Click the **Capture Electronic Signature** button.

Prompts display on the signature pad and the participant/proxy signs.

If the Cancel button is tapped, the system notifies us with the message that the user pressed the cancel button.

And we simply click OK...

<no audio> Click the **OK** button.

...and start the process over.

<no audio> Click the **Capture Electronic Signature** button.

CapSig2A

<no audio – description> Signature pad prompts, proxy signs and OK button is tapped.

CapSig3

Once the OK button is tapped on the signature pad, the signature is captured and we can save it.

<no audio – display> Don't click the Capture Signature button again unless want to start whole signature process again.

<no audio> Click the **Save Signature** button.

CapSig4

The next step is for us to sign indicating that we are responsible for determining Izzy's eligibility.

The Staff Member will automatically default to the user logged into HuBERT when the End Certification process was started.

We can select someone else from the list but, in general, it should never be changed.

What do you think our next step is? Go ahead.

<no audio – hint after 10 seconds and failure message> Click the **Capture Electronic Signature** button.

CapSig5

<no audio> Signature screens.

CapSig6

As before, we click the **Save Signature** button to save it to the database.

<no audio> Click the **Save Signature** button.

WorkMbr

The **Work with Another Household Member Certification** message tells us that we still haven't completed Ima's certification.

WorkMbrA

However, if we click OK...

WorkMbr1

...it goes back to the Participant Search screen instead of directly to Ima's Guided Script.

WorkMbr2

So, we are going to click **Cancel** instead.

<no audio> Click the **Cancel** button.

WorkMbr3

<no audio> Izzy's participant folder...

WorkMbr4

And we can simply click Ima's Guided Script button on the taskbar.

<no audio> Click Ima Dahl's CGS button.

EndCGS7

Since this is the last open Guided Script for the household, instead of clicking the end cert icon (add x animation) we are going to click the **Issue Benefits** link to end the certification.

If we needed to, we could assign a Primary Card Holder and issue a card in the Certification Guided Script but the Dahl household already has a WIC Card so we'll take a look at how to do this in the Benefit Management training modules.

Go ahead and click the Issue Benefits link and finish the rest of the end cert process for Ima.

<no audio> Click the **Issue Benefits** link.

<no audio> Click the **OK** button.

<no audio> Click the **Schedule Appointment** checkbox.

<no audio> Click the **Generate Certification Notice** checkbox.

<no audio> Click the **OK** button.

IssueBenefits

Just follow the steps for issuing benefits. We'll talk about these screens in a later module.

<no audio> Click the **Issue Benefits to Selected Members** button.

<no audio> Click the **Send EBT Data** button.

<no audio> Click the **Close** button.

IssueBenefits1

<no audio> 2 second return to Issue Benefits screen.

EndCGS8

Since we've already collected Ima's signature for Izzy's cert, we can simply save her signature for Ima's cert.

<no audio> Click the **Save Signature** button.

EndCGS9

Again, since we already collected the CPA signature for Izzy's, we can simply save for Ima.

<no audio> Click the **Save Signature** button.

EndCGS10

And we are done with the CGS.

Obviously, there are a lot of steps between starting a cert and ending the cert process, which, as we said before, will be covered in other modules.

Certification History

CertHx

Let's take a look at the Certification History tab.

<no audio> Click the **Certification History** tab.

This tab only provides information about steps completed in Guided Scripts, either for Certifications or Mid-Certification Assessments.

The Start and End Dates and WIC Type are displayed along with each step of the guided script.

Only those steps completed during the Guided Script have a date, time and the staff associated with completing them.

If a second staff person edits information collected in a step, a modified date, time and staff person will display.

Since income is stored for a household and only has to be entered into one household member's CGS, whoever's CGS it was entered into will display the date/time and staff person.

For the Dahl's, we entered the income information into Izzy's record.

CertHx1

Another thing we just need to mention is that HuBERT will always adjust the Cert End Date so that there isn't an overlap between certification periods.

Ima's last cert as a Non-breastfeeding woman would usually end on September 30th, the last date of the month. But since we started a new Pregnancy cert on September 17th, the non-breastfeeding cert ends when the new cert begins.

In the bottom right corner of the Cert History tab is a **Show Details** button.

It becomes enabled once we click on the cert record we want to see more details for.

Let's take a look at the cert we just completed.

<no audio> Click on **Certification 09/17/2017 – 05/31/2018 Pregnant**.

<no audio> Click the **Show Details** button.

And this is where the signatures we collected display.

End

Thank you for reviewing this HuBERT on-demand training module presented by the MN Department of Health WIC Program.