# Participant List - Introduction

## Introduction

This HuBERT on-demand training module…

## Intro1

… is provided by the MN Department of Health WIC Program.  It provides an overview of the Participant List.

# Agency Search

## PPT List

HuBERT opens to the Participant List screen, for the clinic we selected when logging in.

From here, we can choose where to search and how to search for participant records.

The default is to search for participants assigned to our agency regardless of which clinic they currently belong to.

# State WIC ID

## SWID

The State WIC ID, the other default search, is a unique, 8-digit number assigned to each participant when first added to the MN WIC database.

Once assigned, it never changes.

It isn't readily available and it's not something participants know.

## SWID Search 1

In general, we won't search by State WIC ID.

However, since it is unique, when we search by it, only one record will ever display and there may be occasions when we **do** use the State WIC ID to search for a participant.

## SWID Search 2

Once we've entered our search parameters, such as State WIC ID, we either have to click the **Search** button or we can press the **Enter** key on our keyboard.

When entering a number with preceding zeroes, we don't have to type the zeroes.

Let's enter this State WIC ID.

<no audio> Type **94111** and start the search.

### SWID Search 3

If HuBERT can't find a match, the following message displays.

<no audio – message (no audio)> No participant matching your search criteria could be found.

This can mean we either typed the incorrect number or the participant is not assigned to our agency.

<no audio> Click **OK** or press the Enter key on the keyboard.

This time, let's search for State WIC ID **91411.**

<no audio> Double-click into the **State WIC ID** field to highlight.

### SWID Search 4

<no audio> Type **91411** and start the search.

### Columns

The columns that display depend on where we searched.

<no audio- columns (no audio)> State WIC ID, Household ID, Last Name, First Name, MI, Date of Birth, Gender, Clinic Number.

<no audio> Click to the right of the scroll bar to view the rest of the columns.

<no audio- columns (no audio)> Auth Rep Last Name, Auth Rep First Name, Auth Rep MI

## Household ID

### HHID

The Household ID is an 8-digit number.

It's the same for all members of a household and links their records together.

The Household ID can change since a participant can change which household they belong to, such as may occur with foster care.

We write the Household ID on the back of the WIC Card when it is issued, so it can be found there.

Let's find the rest of Katy's household.

To search by Household ID, we must first select the radio button.

<no audio> Select the **Household ID** radio button.

### HHID Copy/Paste

We can copy and paste Katy's Household ID as a shortcut.

First, click on her household ID in the list.

<no audio> Click on Katy's Household ID.

Next we copy by pressing **control plus C** on the keyboard.  However, due to limitations in the training module software, we can't actually press control plus C to copy the Household ID, so…

<no audio> CTRL + C image.

Once copied, we simply click into the Household ID field…

<no audio> Click in the **Household ID** field.

And paste using the keyboard shortcut:  Control plus V.  Again, we can't actually do it, so…

<no audio> CTRL + V image.

Then we start the search.

<no audio> Start the search (click Search or press Enter key).

All members of the household **currently assigned to the agency** will display.

## PAN #

### PAN

The PAN # radio button, which stands for Personal Account Number, allows us to search for a household using their WIC Card number.

<no script> Click the **PAN#** radio button.

### PAN1

Each household is assigned one WIC Card and the number is unique

We can either type the card # or swipe the card, then click Search (or press the Enter key).

# Demographics

## Demographics

Household ID and the card number are always our most effective search methods.

If these aren't available, we can also search by demographic information.

<no audio> Click the **Demographics** radio button.

## Demographics1

Including the participant's last name, first name or birth date and by the last and/or first name of their authorized representative.

Let's search for Lottie Dah by last name.

<no audio> Type **dah** (HuBERT automatically capitalizes text) into the **Participant Last Name** field and start the search.

## Soundex

HuBERT uses Soundex, a "sounds-like", type of search.  Which means it will display similar sounding names.

By adding more search criteria, we can narrow our search results.

Let's add the first 3 letters of Lottie's first name.

<no audio> Type **lot** in the First Name field and start the search.

## PPTListClear

The name fields accept spaces, apostrophes, hyphens, commas and periods, but **not** numbers.

The **Clear** button erases everything so we can start over.

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

## PPTListClear1

<displays cleared Participant List>

# Statewide Search

## StatewideA

By selecting the **Statewide** radio button we can search for participants assigned to any MN WIC agency, including participant records that have been inactive for more than 6 months and moved from our active agency databases to the inactive participant database, called Agency 88.

<no audio> Click the **Statewide** radio button.

## StatewideB

The **Agency** drop-down becomes enabled if we search Statewide by Demographics.

<no audio> Click the **Demographics** radio button.

## StatewideC

For instance, if we are transferring Emma from Anoka to Hennepin and we only have her name…

## Name

<text animation>

## Agency

…due to the sounds-like search results, we may want to limit our search to Anoka.

<no audio> Click the **Agency** drop-down.

## Anoka

<no audio> Select **021 - ANOKA COUNTY HEALTH & ENVIRONMENTAL SERVICES**

## Anoka1

<no audio> Anoka highlighted in list.

## Sort Order

All the columns are the same when we do a statewide search except for the addition of Agency Number.

We can change the sort order by clicking on a column header.

<no audio> Click the **First Name** column header.

## Where to Search

This may come in handy to help narrow a long list of search results.

There are a couple of other Where to Search options that help further filter a search.

If we know a participant belongs to the clinic we are currently working in, we can search by **Clinic**.

Since the lists for the other two options are so small, we aren't required to enter any search criteria. We can simply select **Appointments for Today** or **On-Site** and start our search.

# Appointments for Today Search

## ApptsToday

<no audio> Click the **Appointments for Today** radio button and start the search.

<no audio> Click or tap the Enter key to start the search.

## ApptsToday1

These are the appointments scheduled at our clinic today.

The Kept column indicates if the participant came to their appointment and there are a number of different ways this can be indicated, both manually and automatically.

In this screen, you can mark an appointment as Kept by clicking the checkbox in the column.

<no audio> Click the **Kept checkbox** for Etta Kett.

The **Update Kept** button displays and must be clicked once we've made changes to the Kept checkboxes.

<no audio> Click the **Update Kept** button.

<no audio – message> The appointment attendance has been updated.

<no audio> Click **OK** on the confirmation message.

<no audio> Click to the right of the scroll bar to view the rest of the Appointments for Today columns.

The only other column that may be unfamiliar is the **Resource** column.

## ApptsToday2

This is simply the name of the column in which the appointment was scheduled in the HuBERT scheduler.

# Toggle On-Site

## ToggleOnSite

The last search list is **On-site.**

The On-site list is created by checking participants in using **Toggle On-site**, which is a function agencies can choose to you. It is accessed by an icon on the toolbar or an option in the Participant List menu.

## ToggleOnSite1

It allows us to create a searchable list of participants based on the time they arrive at our clinic.

Typically, the person who greets the participants will check them in.

Let's start by searching for Household ID **13631966.**

<no audio - hint> Click the **Household ID** radio button.

## ToggleOnSite2

<no audio> Type **13631966** into the Household ID field and start the search.

## ToggleOnSite3

Now let's toggle members of the household on-site.

<no audio> Click the **Toggle On-site** icon.

## ToggleOnSite4

The **Toggle** On-Site list includes all household members who are currently assigned to our clinic.

The participant highlighted on the participant list is default selected in this screen.

We can individually select the checkbox of each member we want to sign in or we can click the **On Site** checkbox to select everyone listed. Let's do that.

<no audio> Click the **On Site** checkbox.

<no audio> Click the **OK** button to save our changes.

Both system-generated and user-defined alerts will display when checking participants in. These will be reviewed in another module. For now, just close the alert.

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

## ToggleOnSite5

Once participants are toggled as on-site, or checked in, anyone working in our clinic can search for them in the On-Site list.

# On-site Search

## OnSite

<no audio> Click the **On-site** radio button and start the search.

<no audio>Click **Search** or press the Enter key on the keyboard.

## Onsite1

The primary difference between this list and others is the **On-site Time** column, which allows us to see when participants approximately arrived at clinic.

There are four ways to remove participants from this list; two manual and two automatic.

Participants are automatically removed when benefits are issued and also as part of the end-of-day process that occurs every night.

We might have to manually remove someone if they were checked in but couldn't stay for the appointment.

So let's manually remove the Dah family.  We need to select a member of their household on the list.

<no audio> Click on **Boo Dah**.

## OnSite2

This time we are going to use the **Toggle** On-site function, to toggle them **off** the list.

<no audio> Click the **Toggle On-site** icon.

## OnSite3

Like before, we can individually de-select each checkbox or use the On-site checkbox to de-select all of them.  Let's use the checkbox again.

<no audio> Click the **On-site** checkbox to select it.

<no audio> Click the **On-site** checkbox again to de-select it and the other checkboxes.

<no audio> Click the **OK** button to save our changes.

## OnSite4

The **On-site Time** column is now blank but the Dah household is still listed.

We don't want to clear the screen; we want to refresh the list.  To do that, we simply click the Search button again.

<no audio> Click the **Search** button to refresh the list.

### OnSite5

We can manually remove **all** participants from the On-site list by using an option under System Tools in the File menu.

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

<no audio> Select **System Tools.**

<no audio> Select **Clear On-site List**.

### OnSite5

The confirmation message informs us that removing all the names from the on-site list can't be undone.

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

### OnSite6

We can't really tell that we did anything until we refresh the screen.

<no audio> Click the **Search** button to refresh the list.

### OnSite7

The "no participant matching your search message" displays because there is no one left on the on-site list.

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

### OnSite8

<no audio> Cleared Participant List displays.

## Show Details

### ShowDetails

The Show Details button opens an information panel for the highlighted participant.

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

### ShowDetails1

The current date is October 31, 2017.

There are three sections providing the most recent information: demographics and appointment, certification, and benefit issuance.

We should always view Show Details before opening a participant folder because it gives us a snapshot of the most up-to-date information that can assist us with serving each participant.

For instance, in the cert section, we can see whether she is currently certified and if not, when her cert ended, and why it may have ended.

The yellow highlight indicates she is high-risk, or was high-risk during her most recent cert.

Let's take a look at Show Details for Ivy.

<no audio> Click on **Ivy Vine** to highlight.

## ShowDetails2

Since Ivy's in a current cert period, we can see whether she is due or overdue for a Mid-certification Assessment or if it has been completed.

In the benefit issuance section, we can see what benefits were last issued.

And we can see if she has an appointment scheduled.  It may be important to note that it only displays the **next appointment** and the appointment could potentially be scheduled somewhere other than our clinic if the participant was transferred in from another agency or clinic.

The Show Details button toggles between Show Details and Hide Details.

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

## ShowDetails3

And to keep the search more efficient HuBERT will always default back to hiding the details panel after every new search.

# End

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