System Administration: Module 1 - Referrals/Organizations	
SCRIPT	
Description	**Text**
Introduction	This is Session 11: Module 1 of the HuBERT On-Demand Training provided by the Minnesota Department of Health WIC Program. This session focuses on the System Administration functionality in HuBERT.
Overview	Once we've reviewed Module 1, we will be familiar with the concepts of Program Topics and Referral Organizations and how they work together to create the Referrals list in HuBERT. We will also understand how to add a new referral organization, edit existing referrals, delete unused referrals, and make current referrals inactive.
Definitions	
Definitions1	Referral Organizations are referrals are specific to each agency that can be provided to a participant.
	The system requires a name, full address, county and telephone number for each referral organization. This is necessary so that we can print a document with referral information for participants in HuBERT.
	If this information is unavailable, there are ways around the requirement, which we will review when we discuss how to add referrals.
Definitions2	There are 28 Program Topics that were initially created by the State and Local Agency HuBERT Planning Group.
	Program Topics function like as topic headers or categories for our referral organizations.
Definitions3	This means that referral organizations are entered under an appropriate heading or category represented by a Program Topic.
Logging In	
SysAdmin	Referrals are maintained in the System Administration module.
	We must have the appropriate rights to be able to work in this module, which means we have been assigned Role 10: Referrals.
	If not, and maintaining referrals is going to be your responsibility, you will need to have your coordinator submit a request to update your user profile using the **HuBERT User Request form** found on the CFH Forms and Applications - WIC Tools page of the MDH website.
	Please click the **Continue with Module** button.

<SysAdminIcon>	The System Administration icon is on the desktop of our HuBERT computer and looks like a yellow notebook.
	Go ahead and double-click the **System Administration** icon.
<Location>	We can have the clinic application open at the same time as the System Administration module.
	Since we've already logged into the clinic application today we won't have to login again.
<LocationDD>	The **Location** drop-down displays because most of the System Admin functions are at an agency level.
	The agency or agencies we have access to will be listed in the Agency drop-down.
	We should select the Agency for which we want to add or modify referrals.
	Since we only have access to Anoka, let’s click the **OK** button.
<wait>	<no script>
<Functions>	<no script>
Organizations	
<Organizations>	Referrals are maintained under Organizations.
	The words "Referrals" and "Organizations" are interchangeable.
	Double-click on **Organizations**.
<OpenOrg>	<no script>
<Org>	All Referrals available in HuBERT are listed in ascending alpha-numerical order.
	Notice that names with characters, such as quotations or parentheses, and numbers appear at the top of the list.
	The name of the Referral Organization is always followed by the Agency ID in parentheses.
	We have to include the Agency ID in the name because as we can see from this list, Referral Organizations are maintained at a **State level, not Agency**.
	A checkmark in the **Active** column indicates the Referral can be both viewed and selected in the HuBERT application.
	Referral Organizations can be **Added**, **Edited** or **Deleted** if never used.
	We are going to add a Referral for: La Leche League - Anoka.
	Before adding a new Referral we should use the scroll bar to check the list of current Organizations to ensure we aren’t adding a Referral that already exists for our agency.
<ScrollOrgs>	<no script>
<LaLeche>	It looks like there isn’t a listing for Agency 02...
	...but we scrolled past some of them, so let’s click on the top part of the scrollbar to scroll up one page.

<LaLeche1>	Again, we seem good to go.
ImportantNote	It’s important to note that the list should be thoroughly reviewed since referrals may be spelled differently based on how they were originally submitted to the State. For instance, if we continued scrolling through the Organizations list, we would see that La Leche has been entered as “LA LECHE”, “LALECHE”, “LE LECHE” and “LELECHE”.
Adding Referrals	
AddButton	Go ahead and click the **Add** button.
AddOrg	As we mentioned before, some of the fields in the **Add Organization** window are required.
	Let's identify those fields. Click the **OK** button.
ReqFldsMsg	This message indicates the system has validated whether the required fields have been completed before saving the added Referral.
	Since we didn't complete any of them, all of them are listed.
	Click **OK** on the message.
TypeName	The orange highlights indicate the required fields that must be completed before we can save our new Referral.
	We are going to quickly type its name.
	<pause for typing>
	Notice that we included the Agency ID, 021, in parentheses after the name.
	This is absolutely necessary since Referral Organizations are maintained at a State level and their may be multiple agencies with the same referral names!
	Go ahead and hit the Tab key or click in the Address field.
TypeAddress	We are just going to type a quick address.
	<pause for typing>
	We recognize that some Referrals may not have an actual address or any of the other associated fields, including a telephone number.
	However, as we indicated before these fields are required because of the referral document that can be provided to participants.
	So, we have a couple of options for completing the address-related fields.

RequiredFields	If the referral is for a website, we can enter the URL into the address field.
	If there isn't an address at all, such as may occur with hotlines or crisis numbers, we can enter the address of our agency's main site.
	If there isn't a city, county, zip code or state associated with the referral, again, we can enter our agency's main site's information.
	Lastly, if there isn't a telephone number, we can enter all zeros.
County	Although county isn't required, let's select the county the site of the referral is located in, Anoka.
	Click the **County** drop-down arrow.
County1	Select **Anoka**.
County2	<no script>
City	We are going to quickly type the city.
	<pause for typing>
	Now, hit the **Tab** key.
State	Let's use a hot key to jump our drop-down list to the "M" states. Type an **M.**
State1	Click on the **State** drop-down arrow.
State2	Select **MN.**
State3	<no script>
Zip	We'll quickly type a **Zip Code** and **Telephone number**.
ZipTab	<no script>
OtherFields	<pause for typing>
	If there are two contact numbers and the referral has an "800" number, we recommend putting the "800" number in the Telephone 1 field.
	We can enter a name into the **Contact** field and **Email** fields but they are not required.
	The **Is Outreach Agency** checkbox is functionality used by other states that Share the SPIRIT source code; we do not use it in MN.
	It is associated with the **Affiliated WIC Agencies** list, which we also don't use.
	Lastly, but most importantly, the **Active** checkbox must be selected.
	If the **Active** checkbox isn't selected, we will be unable to assign it to a Program Topic, which we need to do in order for it to display in the Referrals tab in HuBERT.
	So, what do we need to do now?
	Yep, go ahead and click the **Active** checkbox.
SaveReferral	Click the **OK** button to save our new referral.

<StartScroll>	When we first save our referral, the system displays it at the bottom of the Organizations list so that we can easily find it.
	We are going to quickly scroll to make sure our new referral has been added…
<ScrollList>	<no script>
<ListBottom>	…and there it is.
	Once we close this window, the system will alphabetize our new referral as appropriate.
Editing Referrals	
<edit>	Sometimes the information we've input for referrals needs to be updated.
	We can do this by editing the organization.
	Let's update the phone number for our Head Start program.
	We are going to quickly scroll down the list to find it.
<ScrolltoEdit>	<no script>
<ScrolltoEdit1>	<no script>
<SelectRef>	As we can see, there are a lot of different Head Start referral programs listed.
	Remember, you don't just have access to your own referrals; you also have access to everyone else's referrals.
	It is essential that you pay close attention and only work with your own referrals; those with **your agency ID** in the name.
	We are working as Agency 21, so click on that HEAD START referral to highlight it.
<ClickEdit>	Since we want to update the phone number, click the **Edit** button.
<UpdatePhone>	This should look familiar; the **Edit Organization** window looks exactly the same as the **Add Organization** window.
	We can update any of the fields in this screen.
	We are going to quickly update the phone number.
	<pause for typing>
	Go ahead and click the **OK** button to save our change.
Deleting Referrals	
Delete	The system will **not** allow us to delete referrals or organizations that have been assigned to a participant because it is now part of that participant's historical record and therefore, must be maintained as part of the system.
	Just like editing, we need to always make sure that we are deleting the correct organization and not one that belonging to another agency.
	It needs to be noted that once a referral is deleted, it can no longer be retrieved. Deletions are permanent.

<Delete>	Let’s delete the La Leche League referral we just added for Agency 21 since we know no participants have been given the referral.
	We'll quickly scroll to find it in the list.
<ScrollDelete>	<no script>
<ScrollDelete1>	<no script>
<SelectDelete>	Notice that our new referral is now in alphabetical order and not at the bottom of the list. That is because we've closed this window between the different sections of this module.
	Go ahead and click on the La Leche League referral we added for Agency 21 to highlight it...
<ClickDelete>	...and click the **Delete** button.
<ClickYes>	The system will always make sure we actually want to delete the referral since there is no going back once it is deleted.
	This is our last chance to make sure we selected the correct referral to delete.
	Yep, we're sure.
	Click the **Yes** button.
<AfterDelete>	Let’s just check to make sure it’s actually deleted.
<ScrollDone>	<no script>
<ClickFurther>	Our referral was: La Leche League - Anoka (021).
	It should have been listed between La Leche (921) and Chaska (911).
	Click the scroll bar to page down a little further.
<Deleted>	It's definitely gone for good.
	So what do we do if we don't want a referral to display in HuBERT anymore but we can't delete it?
Inactivating Referrals	
<TryDelete>	First, how do we know if a referral has been assigned to a participant and can’t be deleted?
	Well, there isn’t any indication. The only way to know for sure is to try deleting it.
	Since “V” Dental Center (021) belongs to our agency and it's already highlighted, let’s try to delete that one.
	Do you remember how to delete a referral? Go ahead.
<Message>	So, the system will give us a message that tells us that our selected referral cannot be deleted because participants have been referred to the program.
	Click **OK** to exit the message.

<EditButton>	Although we can't delete the referral, we **can** make it **inactive** so that it no longer displays in the Referrals tab in HuBERT.
	To do this, we need to edit it.
	Go ahead and open the Edit Organization window for the "V" Dental Center referral.
<ActiveCheck>	Do you remember from earlier what needs to be selected in order for a referral to be assigned to a Program Topic and to display in HuBERT?
	Yep. The **Active** checkbox has to be selected.
	So, what do you think happens if we remove the checkmark?
	Right. It no longer displays in HuBERT.
	Really, we never have to delete a referral since we can always make it inactive.
	Since we don't want "V" Dental Center to display in HuBERT anymore, go ahead and click the **Active** checkbox to remove the checkmark.
<ClickOK>	Go ahead and save our change.
<Inactive>	We can very easily determine which referrals have been inactivated since those that are inactive no longer have a checkmark in the Active column.
	We now know how to add, edit, delete and make referrals or organizations inactive.
	But we aren't done.
	In Module 2, we will explain how to assign our new referrals or organizations to a Program Topic, which is necessary for them to display in HuBERT.
	Go ahead and click the **Close** button.
<End>	
Questions	Do you have any questions about what we just reviewed? If so, please submit them via the HuBERT Questions form on the MDH WIC website.
End Slide	This completes Session 11: Module 1 of the HuBERT On-Demand Training provided by the Minnesota Department of Health WIC Program.