

# Correcting HuBERT Referrals

JULY 2024

## Overview

The following are step-by-step instructions for correcting issues with Program Topics and Referral Organizations in HuBERT, which need to be resolved as soon as possible. The State Office will verify your referrals have been corrected the week before your agency's WINNIE roll-out.

Your agency's Local System Administrator (LSA) will need to make these corrections.



Do **NOT** delete any Program Topics or Referral Organizations. There is a bug in HuBERT that will allow you to delete them even if they are associated with a participant record.

## Infoview Reports

Due to how referral information is stored in the database, we **cannot** provide an Infoview report that identifies whether your agency has multiple Program Topics or is using other agencies' Referral Organizations. However, you can easily scroll through the Programs in System Administration to identify these two issues.

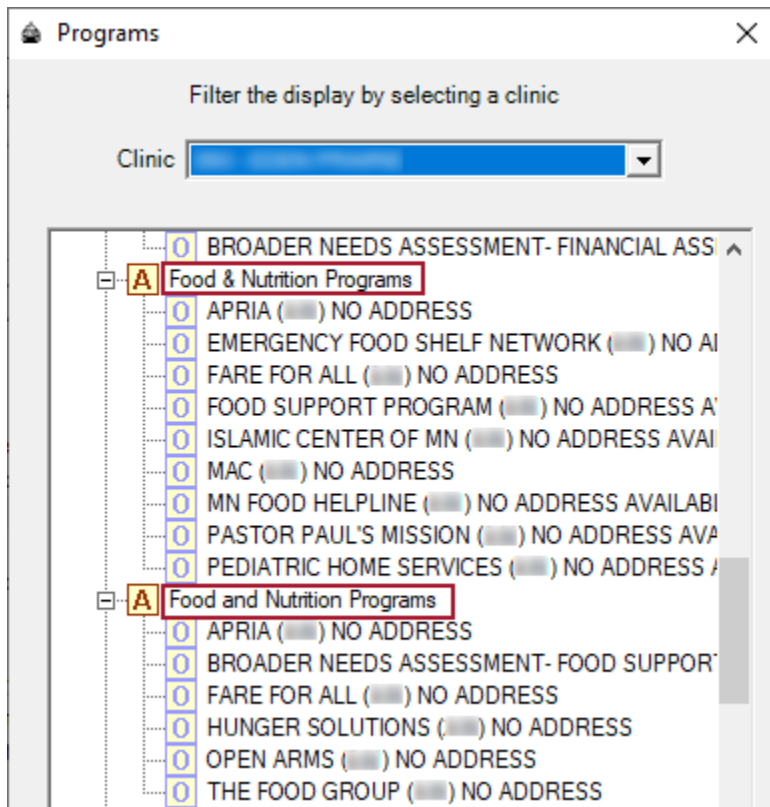
Since Referral Organizations can be pulled by name and the name should contain your agency ID, we **can** provide a report to assist you with identifying duplicate active Referral Organizations. Since Organizations are a statewide list and display in a small window, this report should help simplify this task. The new Infoview report, DUPLICATE REFERRAL ORGANIZATIONS, can be found in the INFOVIEW TEMPLATES >> WINNIE Readiness folder.

## Instructions

### STEP 1: Combine Duplicate Program Topics

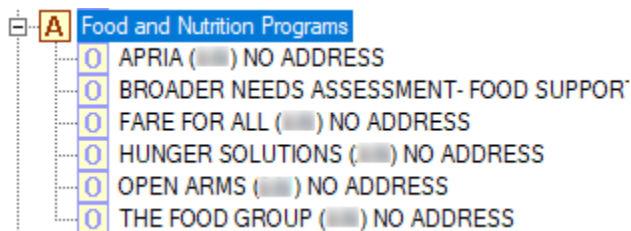
1. Open System Administration.
2. Select Programs.
3. Since Program Topics and Referral Organizations are created at the agency level, the list should be the same regardless of the clinic selected in the Clinic dropdown.

4. Scroll through the list and identify any duplicate Program Topics



5. Highlight the Program Topic you are no longer going to use.

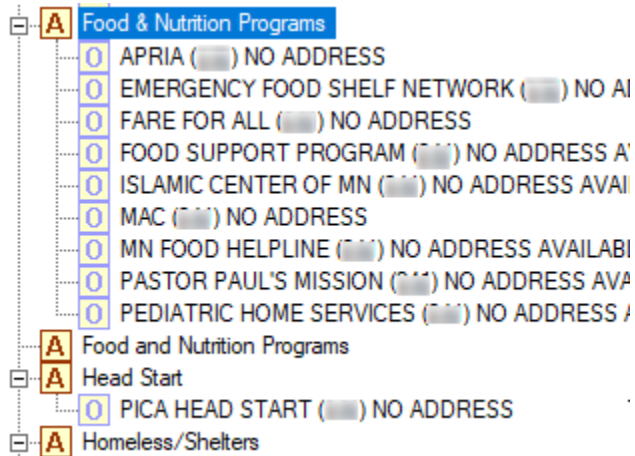
- **Tip!** Choose to keep the Program Topic with more Referral Organizations listed under it.
- **Tip!** Take a screen shot of the Referral Organizations you are going to want to move to the other Program Topic.



6. Click the Edit button.
7. In the Referral Organizations list at the bottom of the Edit Program window, and using your screen shot to quickly scroll through the list to find the highlighted Organizations, click on each highlighted Organization to de-select it.
8. Once all highlighted Referral Organizations have been de-selected, click the OK button.

**NOTE!** The Program Topic with no Referral Organizations will no longer display in HuBERT.

9. Click on the Program Topic you kept to highlight it.

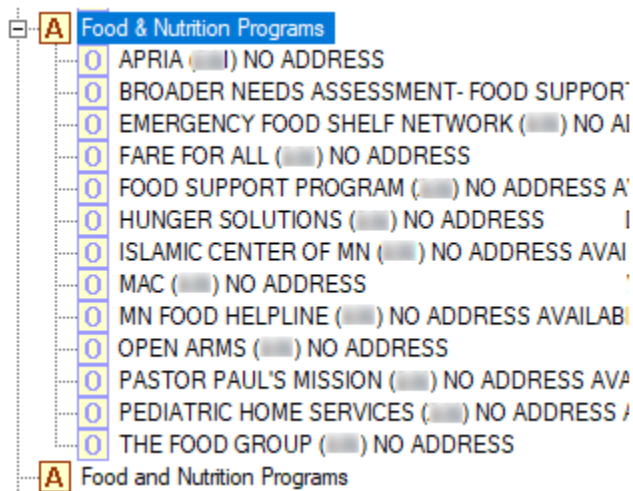


10. Click the Edit button.

11. Scroll through the Referral Organizations list at the bottom of the Edit Programs window and click to highlight and re-select all of the Referral Organizations that used to be listed under the Program Topic you didn't keep.

- **EXCEPT**
  - **Any Referral Organizations already listed under the Program Topic.** (Ex: APRIA and FARE FOR ALL were listed under both Program Topics. You would not reselect these.)
  - **If any of the Organizations you removed did NOT belong to your agency,** you will need to add them for your agency in STEP 2. Do NOT re-add any organizations that do not have your agency ID in the name.

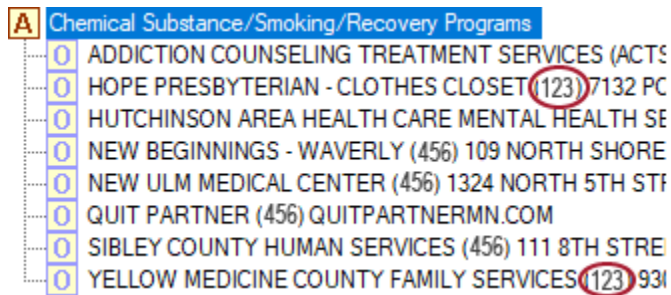
12. Click the OK button.



## STEP 2: Create New Organizations if Using Other Agencies'

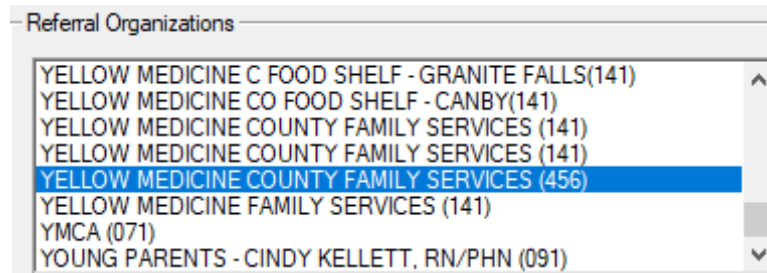
Continuing in Programs...

1. Scroll through the list of Program Topics and Referral Organizations to identify any organizations that do not belong to your agency (organizations with a different Agency ID).



2. Once identified, click the Program Topic it's under to highlight it.
3. Click the Edit button.
  - a. Scroll to find the highlighted organization with another agency's ID.
  - b. Click to de-select it.
  - c. Click the Organizations button.
  - d. Click the Add button.
  - e. Enter the Name of the referral you just de-selected.
  - f. At the end of the Name add your Agency ID in parentheses.
    - i. Ex: YELLOW MEDICINE COUNTY FAMILY SERVICES (456)
  - g. Enter the Address (if no address, type "NO ADDRESS").
  - h. Select the County (if no address, select your county).
  - i. Type the City (if no address, enter your agency/clinic's city).
  - j. Select MN for State.
  - k. Type the 5-digit Zip Code (if no address, type 5 zeroes).
  - l. Type the Telephone 1 (if no Telephone 1, type your agency/clinic's telephone #).
  - m. Click the Active checkbox.
  - n. Click the OK button.
  - o. The new Organization will display in alphabetical order and highlighted.
  - p. Click the Close button.
  - q. Scroll through the Referral Organizations list at the bottom of the Edit Program window to find the organization with your Agency ID that you just added.

- r. Click on it to highlight and select it.



4. Repeat these steps, a – r, for each Organization under the selected Program Topic that has a different Agency ID from yours.
5. When done, click the OK button to return to the Programs window.
6. Verify the organization(s) you just added with your Agency ID are displaying correctly under the Program Topic.
7. Repeat all these steps for any other Program Topics with Referral Organizations that belong to other agencies.
8. Once there are no longer any agencies that don't belong to your agency, review the list one last time to ensure all of your Referral Organizations have your agency's ID in parentheses at the end of their names.

### STEP 3: Wait One Day

### STEP 4: Run the DUPLICATE REFERRAL ORGANIZATIONS Report in Infoview

1. This report is found in the INFOVIEW TEMPLATES >> WINNIE Readiness folder.
2. Save the DUPLICATE REFERRAL ORGANIZATIONS report to your MY FAVORITES.
3. Run it for your agency.

### STEP 5: Edit Duplicate Referral Organizations

**In general, a Referral Organization should only be listed under one Program Topic. If your agency needs to list it under multiple Program Topics, the Referral Organizations needs to have unique names.**

In order to be able to inactivate duplicate Referral Organizations, they must first be given a unique name.

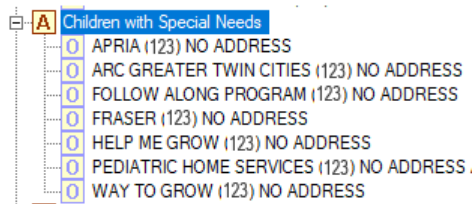
1. Open System Administration.
2. Select Programs.
3. Using the DUPLICATE REFERRAL ORGANIZATIONS report and starting with the first row...

CORRECTING HUBERT REFERRALS

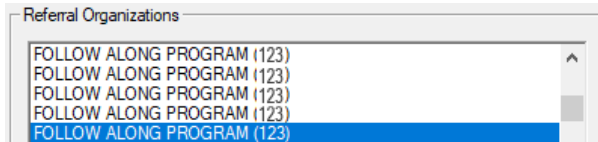
- Identify the number of Referral Organizations you will need; one organization per Program Topic it's listed under (ex: we will need 3 active unique FOLLOW ALONG PROGRAM Referral Organizations because there are 3 Program Topics it's under).

DUPLICATE REFERRAL ORGANIZATIONS	PROGRAM TOPICS
FOLLOW ALONG PROGRAM (123)	Children with Special Needs
FOLLOW ALONG PROGRAM (123)	Family Parenting and Early Education
FOLLOW ALONG PROGRAM (123)	Special Needs

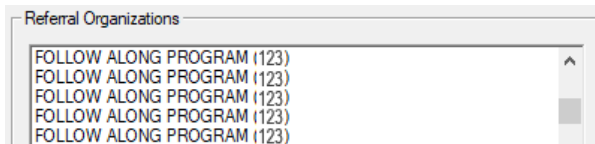
- Scroll down to the Program Topic listed in the first row (ex: Children with Special Needs)
- Click the Program Topic to highlight it.



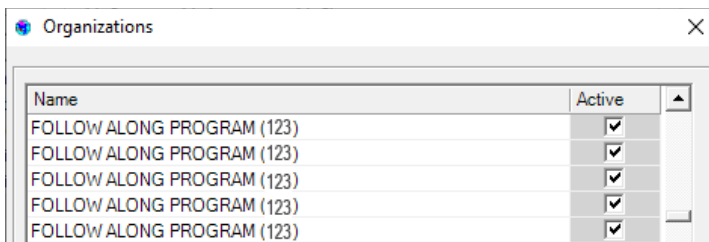
- Click the Edit button.
- Scroll through the Referral Organizations list at the bottom of the Edit Programs window to find the highlighted duplicate.



- Click to de-select the Referral Organization that has duplicates.



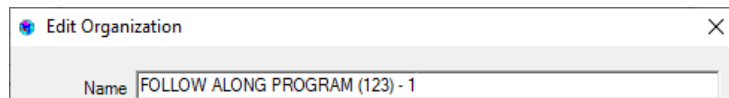
- Click the Organizations button.
- Scroll down to the duplicate Referral Organization (**with your Agency ID** in the name).



## CORRECTING HUBERT REFERRALS

### 12. Make the name unique.

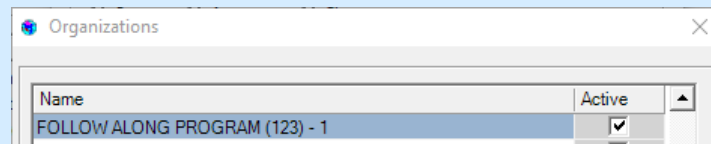
- a. Click to highlight the first duplicate Referral Organization (with your Agency ID) listed.
- b. Click the Edit button (you can also double-click the duplicate Referral Organization to open the Edit Organization window).
- c. Add something to the name to make it unique (ex: add where it's located, add the Program Topic you wanted it listed under, or simply add "- #" to the name).



The screenshot shows a window titled "Edit Organization" with a close button (X) in the top right corner. Below the title bar is a text input field labeled "Name" containing the text "FOLLOW ALONG PROGRAM (123) - 1".

- d. Click the OK button.

**NOTE!** When you click OK, the edited Referral Organization jumps to the top row of the Organizations window. You will need to scroll back down to the remaining duplicate Referral Organizations with your Agency ID.

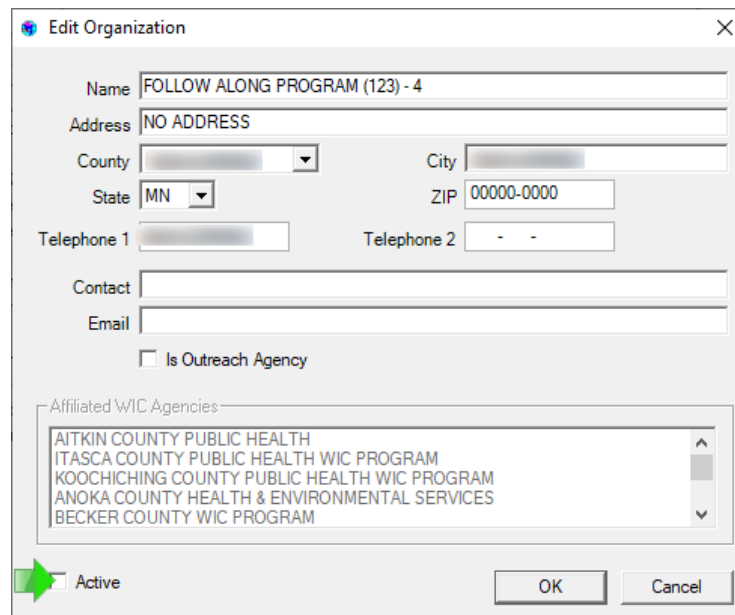


The screenshot shows a window titled "Organizations" with a close button (X) in the top right corner. It contains a table with two columns: "Name" and "Active". The first row is highlighted in blue and contains the text "FOLLOW ALONG PROGRAM (123) - 1" under "Name" and a checked checkbox under "Active".

### 13. Repeat steps a – d for the number of Referral Organizations you will need (based on the number of Program Topics it's going to be listed under).

### 14. For the rest of the duplicates (if there are any more), you are going to rename them (steps a – c) **and** inactivate them.

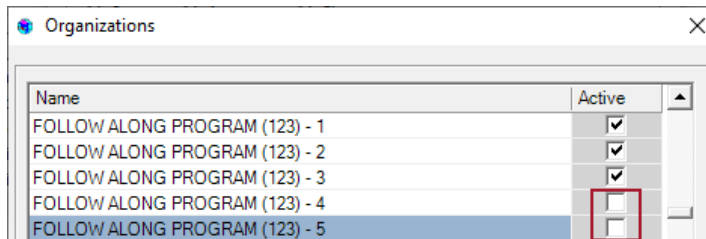
- d. Click the Active checkbox to remove the checkmark then click the OK button.



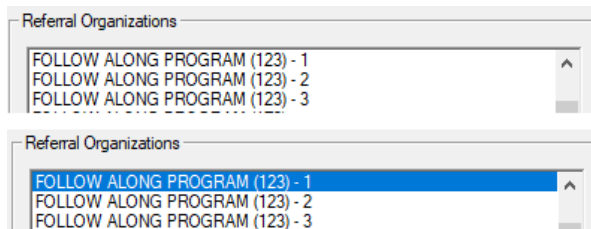
The screenshot shows a window titled "Edit Organization" with a close button (X) in the top right corner. The "Name" field contains "FOLLOW ALONG PROGRAM (123) - 4". The "Address" field contains "NO ADDRESS". The "County" field is a dropdown menu, and the "City" field is a text input field. The "State" field is a dropdown menu with "MN" selected, and the "ZIP" field contains "00000-0000". The "Telephone 1" and "Telephone 2" fields are text input fields. The "Contact" and "Email" fields are text input fields. There is a checkbox labeled "Is Outreach Agency" which is unchecked. Below this is a list box titled "Affiliated WIC Agencies" containing the following text: "AITKIN COUNTY PUBLIC HEALTH", "ITASCA COUNTY PUBLIC HEALTH WIC PROGRAM", "KOOCHICING COUNTY PUBLIC HEALTH WIC PROGRAM", "ANOKA COUNTY HEALTH & ENVIRONMENTAL SERVICES", and "BECKER COUNTY WIC PROGRAM". At the bottom left, there is a green arrow pointing to the "Active" checkbox, which is unchecked. At the bottom right, there are "OK" and "Cancel" buttons.

## CORRECTING HUBERT REFERRALS

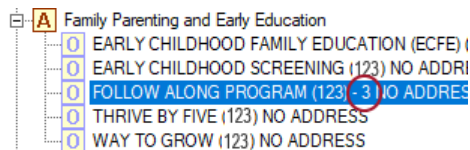
15. Verify that the number of Referral Organizations needed (determined in step 4) are active and any other duplicates are inactive.



16. Click the Close button on the Organizations window.
17. Scroll through the Referral Organizations list at the bottom of the Edit Programs window and click to select one of the edited Referral Organizations.



18. Click the OK button.
19. Scroll to the next Program Topic that had the duplicate Referral Organization.
20. Verify it now has a different Referral Organization than the first Program Topic.



**NOTE!** If any of the other Program Topics have the **same edited Referral Organization**, you will need to select the Program Topic, scroll through Referral Organizations list at the bottom of the Edit Program window, click to de-select the highlighted Referral Organization, and then click to select one of the **other edited Referral Organizations**, and click the OK button.

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](mailto:health.wic@state.mn.us), [www.health.state.mn.us](http://www.health.state.mn.us); to obtain this information in a different format, call: 1-800-657-3942.

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