

## Participant Folder - Introduction

### Introduction

This HuBERT on-demand training module...

### Intro

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

## Participant Folder

### Purpose

The Participant Folder displays the most recent information that we've collected and saved to the MN WIC database, including the most recent certification info and historical info...

### Purpose1

...such as benefit issuance history and previous anthropometric measurements.

### Open PF

We can use the **Open Participant Folder** icon or double-click on the highlighted row in the participant list to open the Participant Folder.

### PPT List

There is also an option to open the highlighted row in the **Participant List** menu.

### Open PF1

Go ahead and open Mara Thon's folder.

<no audio> Click the **Open Participant Folder** icon or double-click on the row in the participant list.

## CPA Review Alerts

### Alerts1

There are two types of alerts that display when participant folders are opened. The first type is the user-defined alert, which we create to share information with our co-workers. We'll review this type of alert in the Manage Alerts module.

For now, we'll simply close it.

<no audio> Click the **Close** button or press the Enter key.

## Alerts2

The other type of alert is System-defined, or CPA Review alerts. These are messages automatically generated by HuBERT when a member of the household is due for a certification or mid-certification assessment or needs to provide information, such as proof of income.

They all display based on different parameters. We just need to know that they will automatically display in enough time to notify us if something is needed and will stop displaying once the required condition is met or the date of the requirement is past.

The CPA Review alert includes all messages for the household, which means it will only display once when we open multiple participant folders from the same household at the same time.

Go ahead and close this system-defined alert.

<no audio> Click the Close button or press the Enter key.

## Multiple Participant Folders

### Multiple

We can have multiple participant folders opened at the same time from the same or different households. The List screen will always remain open.

Depending on your settings, buttons will display on the taskbar for each open folder allowing us to toggle easily between them.

<no audio> Click on Mara's button.

<no audio> Click on Mama's button.

<no audio> Click the **List** screen button.

### Buttons1

We can also hover over the buttons to see the participant details...

### PF

...that display on the title bar of each folder.

### PF1

HuBERT won't allow us to open the same folder twice but it will allow more than one person to have the same participant folder opened at the same time.

However, this can become a timing issue if changes are made so best practice is for only one user to have a specific participant folder open at a time.

### PF2

The participant folder imitates hanging file folders.

Each tab contains information that belongs to the tab subject.

Some tabs, like Demographics, have sub-tabs on their right margin.

Bright yellow tabs are a quick visual indicator that the participant is considered high-risk.

### PF3

Much of the information in the participant folder can be updated at any time, such as when scheduling appointments or during nutrition education contacts.

When information is **changed**, like in Demographics...

### PF4

..the system will ask if our changes should be saved before leaving the tab. If we see this message, we should generally click Yes.

<no audio> Click **Yes**.

### PF5

However, if a participant is at WIC for a certification or Mid-certification assessment, then changes to the participant's information should be made in the Guided Script, not the participant folder.

## Review CPA-determined Follow-up Information

### Iss Freq

Let's take a look at a couple of functions found in the Participant Activities menu in the Participant Folder.

Sallie Mander's Issuance Frequency, or how many months of benefits can be issued at one time, is currently set to monthly.

## Iss Freq 1

We can change that in the Participant Folder by clicking on the participant activities menu...

<no audio> Click the **Participant Activities** menu.

...and selecting **Review CPA-determined Follow-up Information**.

## Issue Freq 2

Click the drop-down to see our options.

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

While most participant will be tri-monthly, or receive 3 months of benefits at one time, there may be instances where providing only one month is appropriate and we can change that here (as well as in the certification guided script, which we'll see later).

# Terminate & Reinstate

## Terminate

Let's open the Participant Activities menu again.

<no audio> Click the **Participant Activities** menu.

Participant certifications can be terminated for a number of different reasons, both automatically by the system and manually by WIC Staff. Let's look at manually terminating a cert.

<no audio> Select **Manually Terminate Participant**.

## Terminate1

We always have to select a termination reason.

<no audio> Click the **Termination Reason** drop-down.

Many of the reasons listed are system terminations, such as Categorically Ineligible, Certification Expired, Failed to Pick-up, and Income No Longer Meets Requirements.

Death of Participant and Fraud/Abuse are two reasons that we may need to select but are, thankfully, very very rare.

Let's view the rest of the list.

<no audio> Click below the scroll bar.

## Terminate2

The **Recertified as B or N** can be used to terminate a pregnancy certification if we need to recertify a woman as postpartum and HuBERT won't allow us to start a new cert yet because the Cert End Date of their pregnancy cert is too far into the future.

We don't terminate if they move out of the state or to another county within MN, so we won't use the Residency No Longer Meets Requirements.

Lastly, a participant may ask to no longer participate in WIC.

Although it occurs very very rarely, let's select **Participant Requested Termination**.

<no audio> Select **Participant Requested Termination**.

## Term Policy

When we terminate a participant's certification, we are indicating ineligibility for the WIC Program. In general, this does require written notification, which is why the checkbox is auto-selected.

The policy for this is provided in Chapter 5 of the MN Operations Manual, or MOM. Let's Generate the Official Notification by clicking **OK**.

<no audio> Click **OK** to generate the Official Notification.

## TermLetter1

The Letter of Ineligibility lists the reason why the participant was terminated, and as required by policy, provides the participant with the opportunity to have the decision reviewed.

<no audio> Click to Continue with Module.

## Term1

We can see the termination date and reason in the Show Details panel...

## Term2

...and in the Demographics AdditionalInfo2 Tab.

## Reinstate

We can also reinstate a terminated certification as long as the cert period has not ended meaning the Cert End Date is in the future (and it is appropriate to do so).

<no audio> Click the **Participant Activities** menu.

<no audio> Select **Reinstate Terminated Participant**.

<no audio> Click **Yes**.

## Reinstate1

We'll find this is a handy function since HuBERT auto-terminates participants for Failure to Pick-up and we won't be able to issue benefits until we've reinstated them.

## Print Participant Summary

### PPTSummary

<no audio> Click the **Participant Activities** menu.

We can also print a summary of a participant's certification period. Let's go ahead and do that.

<no audio> Select **Print Participant Summary**.

### PPTSummary1

All of Mara's certification periods are listed in the Produce Participant Summary dialogue and we can select whichever one we may need.

This document could potentially be used to provide historical certification information, such as to verify a participant was on the WIC program during a certain time period, or to provide referral information to other programs or health care providers. We just need to make sure to follow our agency's procedures and Release of Information requirements.

Let's run the summary for the first cert listed.

Since it's already selected, we simply click the **OK** button.

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

### PPTSummary2

Keep in mind that this is sent immediately to the printer and has private data since it has Mara's name, birth date, address, telephone and authorized rep's name. Along with any measurements taken during her cert period.

### PPTSummary3

It also lists her risk factors, any food packages with effective dates during the cert period...

### PPTSummary4

...and Nutrition Education topics and benefit issuance information.

## Generate Official Notification

### GenNotice

The **Generate Official Notification** option prints termination letters for **all participants** who have been automatically terminated by the system, which can be an awful lot of letters.

Since we don't notify these participants, because in most cases we can recertify or manually reinstate them, we do not use this function.

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

## Work with Another Household Member

### Work

The Work with Another Household Member function allows us to open other household member's participant folders without using the search screen.

### Work1

However, it closes the current participant's folder...

### Work2

...and re-displays the household alerts.

### Work3

<no audio – on screen> Displays Mama Thon's participant folder.

So in general...

### Work4

...we suggest using the search function, which allows us to have multiple household member's folders open at the same time.

## Closing the Participant Folder

### Close

The EXIT icon does not close the Participant Folder like we might think, instead it closes the clinic module completely, including all open folders and the list screen.

### Close1

There is an option in the Participant Activities menu...

<no audio> Click the **Participant Activities** menu.

But more likely we'll use the Close Participant Folder icon or simply click the X in the top right corner.  
Go ahead and close the folder.

<no audio> Click the X to close the participant folder.

### Close3

<no audio – on screen> Back to search screen.

## End

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