

System Administration: Module 2 - Programs	
SCRIPT	
Description	Text
Introduction	This is Session 11: Module 2 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	In Module 1, we reviewed how to create referral organizations. In this module, we will discuss how to categorize them by adding new Program Topics, editing referral organizations grouped under Program Topics and deleting unused Program Topics
Logging In	
SysAdmin	Referrals are maintained in the System Administration module. Remember, we must have the appropriate rights to be able to work in this module, which means we have been assigned Role 10: Referrals.
<SysAdminIcon>	Go ahead and double-click the System Administration icon.
<Login>	Again, since we've already logged into the clinic application today we won't have to login again.
<LocationDD>	We will be working with Nobles this time. Click the OK button.
<wait>	<no script>
<Functions>	<no script>
Programs	
<OpenProgram>	As we saw in Module 1, we maintain our actual referrals in Organizations.
	We group our referrals and coordinate where or how they will display in HuBERT in Programs.
	Double-click on Programs .
<Programs>	The Programs window is where we manage our headers and categorize our referral organizations.
Definitions	As we mentioned in Module 1, Program Topics are headers under which all referral organizations are grouped or categorized.
	They are maintained at the agency level so that any referrals we add for our agency will display for all of our clinics.
	Agencies do not have to use all of the different headers; only those topics that have referrals grouped under them will initially display in HuBERT for our users.

<PrgmScreen>	In MN, we do not maintain any referral information at the Clinic level.
	If we did, the Clinic drop-down would have some functionality.
	As it is, we can just ignore it since it doesn't do anything for us.
	The Program Topics currently being used by your agency are listed on this screen.
	All of these topics have referral organizations grouped under them as indicated by the plus (+) in the tree structure.
	Go ahead and click the "+" (plus) next to Breastfeeding Resources .
<Orgs>	All of the referrals that your agency has grouped under the topic display.
	The "A" stands for Agency, which is the level we now know Programs are maintained at.
	The "O" stands for Organizations.
TopicsList	We have 28 optional programs that were identified by both state and local agency staff.
	A list of these Program Topics is available for reference on the Session 11 training page on the MDH WIC website.
	You can click the link to view it if you want to.
	When ready, click the Continue with Module button.
<Topics>	Although there are 28 possible topics, we can see that only some of them are listed for Nobles.
	Programs can only be added once there is a referral organization available that we can assign to it.
	This is why we create our organizations first.
	Before we started this module, we added two new referral organizations for Nobles, Agency 281, called: 123 Dental and 456 Dental.
	We would like to place this organization into the Dental Health category but we can see that currently Nobles does not have this topic.
	So, how do we add a new Program Topic for our agency?

Adding Programs	
<Add>	The first step is to click the Add button. Go ahead.
<SelectAgency>	The Add Program window is where we can add a Program Topic we haven't used yet.
	Let's start with the Program Visibility section.
	This section is exactly what it sounds like. It determines at what level the program should be visible: State, Agency or Clinic.
	The default is State but knowing what we do about our referrals and programs, what do you think we want to select?
	Yep. We MUST select the Agency radio button to ensure that the program displays only for our agency.
	Since it is the most important step when adding a program, let's select the Agency radio button before doing anything else.
<Visibility>	Notice that all of the agencies in MN are now listed and that our agency, Nobles, is auto-selected.
	The system default selects the same agency we selected when we first opened System Admin.
	So, what would happen if we forgot to select Agency and accidentally added our Program at the State level?
	The new Program and its referral organization would be visible to all agencies and clinics in the state and the only way to remove it is to have the Contractor do it for us.
	Since it isn't simple to fix, we are responsible for remembering to do it correctly by always selecting Agency .
	The Clinic radio button would allow us to maintain referrals at the clinic level, which we don't do in order to keep it as straightforward and simple as possible:
	All of an agency's referrals are viewable in the Referrals tab for all of the clinics associated with that agency.
	We also don't use the Link to Parent Program functionality.
The next step is to add the name of the Program Topic into the Description field.	
ImportantNote	When adding Program Topics, we should use the Program Topics Reference available on the MDH WIC website
	The reference lists all the available program topics. Do not add additional topics or call them different names. By having all agencies use the same Program Topics we can ensure continuity of services when participants transfer to another agency.
	Click the Continue with Module button when ready to go on.

<p><Description></p>	<p>We are going to quickly add the topic of Dental Health, which we know is one of the approved Program Topics.</p> <p><pause for typing></p> <p>The last step is to select the Referral Organizations that should be included in this category.</p>
<p><SelectDental1></p>	<p>In order for the system to save the new Program Topic we have to assign at least one referral organization to it.</p> <p>We do this by highlighting the referral we want to assign in the Referral Organizations list.</p> <p>This is a multi-select list.</p> <p>This means we can select both of our dental agencies at one time.</p> <p>We need to make sure that we select our referrals and not another agencies since a lot of them have similar names.</p> <p>Remember, our referrals always have our agency ID in parentheses behind the name.</p> <p>Go ahead and click on 123 DENTAL (481) to highlight it.</p>
<p><SelectDental2></p>	<p>Now, click on 456 DENTAL (481) to highlight it.</p>
<p><SaveChanges></p>	<p>You are probably wondering what the Organizations button is for but let's wait until the next section to discuss it.</p> <p>Before we save our changes, let's make sure we've covered all or bases.</p> <p>We know "Dental Health" is an approved program topic because we got it from the reference on the website.</p> <p>We selected the Agency radio button so we won't accidentally save it for the entire state...</p> <p>...and we've selected our agency's referral organizations that we want to group under our new topic.</p> <p>We are good to go.</p> <p>Click the OK button to save our changes.</p>
<p><NewProgram></p>	<p>We can see that our Dental Health program topic has been added to the list.</p> <p>Click the "+" next to Dental Health...</p>
<p><NewProgram1></p>	<p>...and our new referrals are listed.</p> <p>So, what if we want to add another referral under an already existing program topic?</p> <p>Well, we know that the Add button pertains to adding new program topics...</p> <p>...but this time we want to add a <i>referral organization</i> .</p> <p>In order to do that, we need to edit the program topic.</p>

Editing Programs	
<Click+BFRsrc>	The most common type of Program edit is to add a Referral Organization so that it displays under the correct Program Topic...
	...or to delete a Referral so that it no longer displays under a Program Topic.
	We already discussed how to add a brand new Referral Organization in the previous module.
	We also discussed how to delete or deactivate a Referral Organization so that it will no longer show in HuBERT.
	But now we need to know how to add a new Referral Organization so that it is listed under the appropriate Program Topic.
	So, let's add a new Referral under Breastfeeding Resource .
	First, let's click the plus "+" next to Breastfeeding Resources to see what Referral Organizations we already have listed.
<hover>	It appears that there are 4 referrals currently available under this topic.
	Notice that we can hover our mouse over the referral to see the rest of its information.
<hover1>	<no script>
<hover2>	<no script>
<EnableEdit>	You've probably noticed that the Edit button is disabled.
	How do you think we enable it?
	Right. We have to click on the Program Topic we want to add our new Referral to.
	Go ahead and click on Breastfeeding Resources to highlight it.
<ClickEdit>	Now that we've identified which Program Topic we want to edit, the Edit button is enabled.
	Click the Edit button.
<ClickArrow>	If we needed to, we could edit the Description of our Program Topic in case we mis-typed it.
	The Referrals that are already currently listed under Breastfeeding Resources for Nobles County are highlighted in the Referral Organizations list.
	Do you remember that there were 4 of them? Let's see if they are all highlighted.
	Go ahead and click the Referral Organizations scroll up arrow.
<click1>	Click it again.
<click2>	That's two highlighted referrals.
	Let's click the arrow one more time...

<ClickOrg>	...and two more makes four.
	We know from the previous section that to add a Referral under Breastfeeding Resources, we need to highlight it in the Referral Organizations list.
	But, instead, why don't we take the opportunity now to see how the Organizations button functions and add another new referral to that list?
	Go ahead and click on the Organizations button.
<ClickAdd>	Looks kind of familiar, doesn't it?
	It has all the same functionality as we reviewed in Module 1.
	So, are you wondering why we don't just do everything from within Programs?
	Well, that is certainly an option.
	We can choose to manage our referrals using either the Organizations functionality or through the Add/Edit Program windows.
<TypeName>	When the referrals were being maintained for all of the agencies in the state, we found it easier to make all our referral changes under Organizations and then complete the process in Programs .
	However, the choice is up to you. Click the Add button.
<TypeAddress>	We are going to quickly type the information necessary to add another resource called "BF" Consultants.
<County>	<pause for typing>
<TypeCity>	<pause for typing>
<State>	<pause for typing>
<TypeZip>	<pause for typing>
<TypePhone>	<pause for typing>
<CloseAddOrg>	Do you remember what we need to do to make sure the referral is added to our list? Go ahead.
<AddToBottom>	Nice! Yep. We always have to select the Active checkbox when adding a referral.
<ScrollDown>	Let's click the OK button to save our new referral.
<NewReferral>	Remember from Module 1 that when referrals are first added, they add at the bottom of the Organizations list...
<CheckList>	<no script>
	...and there it is.
	Click the Close button.
	We might expect to find our new referral at the bottom of the Referral Organizations list also. Let's check.

<ListBottom>	OK. Then it must be at the top of the list since we put quotation marks around BF in the name.
<ScrollUp>	<no script>
<Cancel>	Huh. Not there either.
	We know we added it and we know it's active. So why isn't it in the list?
	Well, the system needs to refresh the Referral Organization list. This means we need to cancel out of this window and when we open it again, it will display.
<ClickAgain>	Breastfeeding Resources is still highlighted so our buttons are still enabled.
	Click the Edit button again.
<List>	This time, we should expect to see our new referral listed alphabetically.
<ScrollAgain>	<no script>
<InList>	And there it is!
	So, what do we need to do to add it to our list of Breastfeeding Resources referrals?
	Go ahead. You know what to do.
<ClickOK>	Click OK to save our change.
<OpenBFRsrc>	Let's double-click on Breastfeeding Resources to make sure our new referral has been added.
<EndEdit>	We are good to go.
	So, just remember, the tricky thing here is that in order to add a referral to a Program Topic, we have to EDIT the Program Topic.
Deleting Programs	
<SameRules>	The rule that applies when deleting Referral Organizations also applies to deleting Program Topics.
	The system will not allow us to delete Program Topics that have Referral Organizations that have been assigned to a participant...
	...because it is now part of the participant's historical record and must be maintained as part of the system.
	Let's see what happens if we try to delete Breastfeeding Resources.
	Do you remember how to enable the buttons below? Go ahead and do it.
<ClickDelete>	Right. Once a Program Topic is highlighted, the buttons become enabled.
	What do you think we have to do to next to try to delete the Breastfeeding Resources program topic? Do it.
<VerifyDelete>	HuBERT will always verify whether we are sure that we want to delete the selected Program Topic. Click Yes .

<NoDelete>	It will also let us know when we can't delete the topic. Click OK .
<EndDelete>	<no script>
Functionality	A few last notes on how Referral Organizations and Program Topics function together.
	When a Referral or Organization is edited, it is automatically updated under the Program Topic where it is assigned.
	When it is deleted, it is automatically deleted and...
	...when it is made inactive, it is automatically removed from under its Program Topic.
Updating HuBERT	The next time we reset our Local Reference Data on the computer we are using, the changes to the Referrals or Program topics will display in the Participant Folder.
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 2 of the HuBERT On-Demand Training provided by the Minnesota Department of Health WIC Program.