Introduction

Introduction

This HuBERT on-demand training module…

Intro

…is provided by the MN Department of Health WIC Program. It provides an overview of in-state transfers.

In-State Transfers between Clinics

Occur

In-state transfers occur when we open the folder of a participant who belongs to our agency but is assigned to a clinic other than the clinic we are currently working in.

When we transfer a participant, other members of the household must also be transferred in order to keep the clinic in sync for all household members, which is necessary for eWIC, or issuing benefits to a WIC Card.

Reasons

There are many reasons why we might need to transfer a participant between clinics within our agency, such as: the participant wants to go to a different clinic, we need to complete some work in a folder for a participant we saw when working at another clinic, our appointments are made at a central clinic site for other clinics, chart audits, etc.

Search

Today, we are working at Dakota County's Apple Valley Clinic #061.

We need to open Maude Lin's participant folder. Her household ID is: 13638567.

<no audio> Click the Household ID radio button.

Search1

<no audio> Enter: 1363856 and start the search.

Open PF

Maude, and her son Frank, are currently assigned to Clinic 062.

Since she belongs to another clinic, when we open her folder we automatically initiate an in-state transfer.

<no audio> Open Maude's participant folder.

XferMsg

The confirmation message: "Do you want to transfer this participant to this clinic?" displays. We do, so click Yes.

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

XferPpts

The Transfer Participant screen performs a group transfer for the entire household because benefit issuance to the WIC Card occurs at both the clinic and household level.

Because of this, when we transfer a participant, we need to keep the household, and the clinic they are currently assigned to, in sync.

We are always going to transfer everyone listed.

XferPpts1

Clicking the OK button in this screen continues the transfer process while clicking Cancel will stop the transfer. We should only click OK if we are sure we want to transfer this household. Otherwise, now is the time to cancel the transfer.

<no audio> Click the **Yes** button or press the Enter key on the keyboards

ClinicChngMsg

Once we click OK on our group transfer message, the clinic numbers update, essentially completing the transfer.

The next message tells us that we must communicate the clinic change to the EBT Processor.

If we click the Cancel button on this message…

UserAlert

..The system will display any user-defined

SystemAlert

…And/or system-defined alerts.

Lock

Before it changes the Clinic numbers back and displays another message indicating communication with the EBT Processor was unsuccessful and the Participant Folder is now locked.

Our only option is to click OK…

Lock1

…and when the Participant Folder opens, as promised, all the fields are grayed out and the folder is locked.

To unlock it, we simply need to re-initiate the transfer, and this time, complete it.

Let's do that.

<no audio> Close the **Close Participant Folder** icon.

Unlock

<no audio> Open Maude's participant folder.

Unlock1

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

Unlock2

<no audio> Click the **Yes** button or press the Enter key on the keyboards

Unlock3

This time, and forever after, we are going to click the OK button on this message.

EBTHHDemo

The EBT Household Demographics screen opens.

This screen is how we communicate household and eWIC changes to the EBT Processor and we will talk about it in detail in the eWIC/benefit issuance modules.

Keep in mind though that we can perform all the functions available in this screen when completing a transfer.

But for now…

EBTHHDemo1

…we are simply going to communicate our changes to the EBT Processor by clicking the **Send EBT Data** button.

<no audio> Click the Send EBT Data button or press the Enter key on the keyboard.

A confirmation message then displays telling us that the changes have been saved.

<no audio> Click the **OK** button or press the Enter key on the keyboards

UserAlerts1

Our user-defined and system-defined alerts display. Go ahead and close them.

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

SystemAlerts1

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

OpenPF1

And Maude's folder is open and she now belongs to our clinic as we can also see in the Clinic Assigned field at the bottom of Demographics.

In-State Transfers between Agencies

SearchSW

In-State Transfers also occur when opening the folder of a participant that belongs to another agency.

Go ahead and search for the Bear household that currently belongs to Pine County - Agency 262. Their Household ID is 10032105.

<no audio - failure hint> Searching for a household that belongs to another agency? We need to search Statewide. Click the **Statewide** radio button.

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

SearchSW1

<no audio> Enter 10032105 and start the search.

OpenPF1

Two members are currently assigned to Agency 262 and two are assigned to Agency 88.

To initiate our in-state transfer, let's open Mama Bear's participant folder using the Open Participant Folder icon.

<no audio> Click to highlight Mama's row.

<no audio> Click the **Open Participant Folder** icon.

TransferMsg

The message that displays when transferring from another agency has a reminder to update the physical and mailing addresses since these will most likely have changed if the participant is going to a different county for WIC.

<no script> Click the Yes button.

TransferPptsMsg

As before, all household members are listed, including those belonging to Agency 88.

Remember, participants belonging to agency 88 are inactive so we wouldn't necessarily want to transfer them.

But the Agency 88 members will be transferred back to Agency 88 by End-of-Day.

So, like before, we'll transfer everyone.

Go ahead and finish the transfer.

<no audio – failure hint> Click the OK button or press the Enter key.

PFMsg

<no audio – failure hint> Click the **Send EBT Data** button.

EBTHHDemo2

<no audio – failure hint> Click the **Send EBT Data** button.

<no audio – failure hint> Click the **OK** button or press the Enter key.

UserAlert2

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

OpenPF2

<no audio> Screen returns to Participant List before folder opens.

UpdateAddress

When a household transfers between agencies, we need to remember to verify whether they have a change in address and to update both the residential and mailing addresses, especially since, as we'll see in later modules, the Mail Zip Code is associated with WIC Card validation.

View Participant Transfer History

ActivitiesMenu

If we need to, we can view a participant's, or as we'll see, a clinics, transfer history. This is a function found in the Activities menu on the Participant list.

<no audio> Click on **Activities**.

<no audio> Select **View Participant Transfer History**.

ViewPPTXferHx

In the View Participant Transfer History screen we can look at a participant's transfer history by searching for them using their State WIC ID or name.

HuBERT automatically searches the Statewide database. If we use a name, our search results will be based on Soundex, just like the Participant List.

The Date Range includes any date less than or equal to our current date, and if we only search by date we'll be looking at a clinic's transfer history.

Let's look at the transfers we've performed in this module.

Dates

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

<no audio> Select March 6th.

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

<no audio> Select March 6th.

<no audio> Click the **Apply Filter** button.

Grid

The Transfer History grid lists the date and time, the participants, where they transferred from, where they transferred to, and the Staff ID of the person who completed the transfer.

Once there is information in the grid, the Print button becomes enabled.

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

Print

<no audio> Click when ready to continue.

Change Clinic

Change Clinic

Earlier, we looked at transferring records between clinics. But if our agency has more than one clinic, we can also change the clinic we are currently working at.

Why?

A few of examples where we might consider doing this would be if we were at a central site and scheduling a number of appointments for another clinic, or if we were catching up on SOAP notes or auditing charts for participants that belong to a clinic that we weren't currently working at, we might choose to switch to the other clinic and avoid transferring records between clinics.

Let's change from Apple Valley to our West Saint Paul clinic.

Open Change Clinic

First, we need to make sure that all participant folders are closed and the Participant List has been cleared. We can find our Select Clinic function in the File menu.

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

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

<no audio> Select **Select Clinic.**

Select New Clinic

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

Select New Clinic1

<no audio> Select **WEST ST PAUL.**

Select New Clinic2

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

Prompt Change

Even though we selected West St. Paul clinic, it still looks like we are working in Clinic 61 – Apple Valley.

We have to perform a search before the change displays in our Participant List header.

Let's search for the Bear household again.

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

<no audio> Enter: 10032105 and start the search.

New Clinic

When the search results display the header is updated indicating we are now working in Clinic 62 – West St. Paul.

Login Location

We should note that if we were to logout without returning to our original clinic, the next time we login, our Location will once again default to our original clinic, which was what we selected during the login process. Changing our clinic in HuBERT does not change our Location clinic when we login in.

Back to Orig Clinic

That said, let's return to our original clinic, Apple Valley. We would want to make sure we returned to our original clinic so that any work we perform is associated with the correct clinic. Go ahead and do everything including searching for the Bear household to verify the change back to our original clinic. Click if you are unsure what to do…

<no audio – failure hint> We have to ensure all participant folders are closed and the Participant List is cleared. Click the **Clear** button.

Back to Orig Clinic1

<no audio – failure hint> Click the **File** menu.

<no audio – failure hint> Select **System Tools.**

<no audio – failure hint> Select **Clinic.**

Back to Orig Clinic2

<no audio – failure hint> Click the **Clinic** drop-down.

Back to Orig Clinic3

<no audio – failure hint> Select **APPLE VALLEY**

Back to Orig Clinic4

<no audio – failure hint> Click the **OK** button or press the Enter key.

Back to Orig Clinic5

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

Back to Orig Clinic6

<no audio – failure hint> Please verify 10032105 was entered correctly and click the Search button or press the Enter key.

Back to Orig Clinic6

<no audio – failure hint> Please verify 10032105 was entered correctly and click the Search button or press the Enter key.

End

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