

Local Use Questions

Slide Title	Slide Text
Introduction	<p>This HuBERT on-demand training module is provided by the MN Department of Health WIC Program.</p> <p>It is an overview of the functionality available in the System Administration - Local Use Questions.</p>
Overview	
Overview 1	<p>Local Use Questions are part of the System Administration module of the HuBERT application.</p> <p>They can be accessed by WIC users who have Role 10 - LSA.</p> <p>Local Use Questions are question and answer fields defined by each Local Agency that can be used to collect information of interest to them.</p> <p>The questions and answers are specific to each agency and do not transfer with a participant's record.</p> <p>Each question can be set to be required in the Certification Guided Script (CGS) and the Participant Folder, required only in the CGS, or to never be required.</p>
Local Use Questions	
Icon	Go ahead and open the System Administration module by double-clicking on the icon.
Splash Screen	<no script>
Location	<p>Like all Location windows in HuBERT, it will display the agencies we have access to...</p> <p>...and default to the most recent agency selected.</p> <p>We are going to create some Local Use Questions for Washington County.</p> <p>Click the OK button.</p>
Select LUQs	Go ahead and open the Local Use Questions by double-clicking on the function in the list.
LUQ Screen	<p>The Local Use Questions screen displays previously defined questions based on WIC Category.</p> <p>Since there aren't any questions defined yet, we have only one function available to us: Add Question.</p>
Adding Questions	
Add Question	Let's click the Add Question button.
WIC Category	<p>For our first question, we want to collect whether our pregnant participants would like a PHN to visit.</p> <p>Since each question is created for a specific WIC Category, our first step is to select the WIC Category we want to collect the information for.</p> <p>Go ahead and select Pregnant as our WIC Category.</p>

Pregnant	<no script>
Highlight	<no script>
Type Q1	<p>The Question ID is a unique number that the system will automatically assign to this specific question once the question is saved.</p> <p>This unique number links the questions to its answers in the database and can be used for reporting purposes.</p> <p>Our next step is to enter our question, which we can type directly into the Question field.</p> <p>This field allows letters, numbers, and special characters, and has a maximum limit of 50 characters.</p> <p>We'll stay well within that limit. Go ahead and type: PHN Visits and press the Tab key on the keyboard.</p>
Required Answer	<p>The Require Answer drop-down allows us to define when we want to require our users to complete this field.</p> <p>Click the drop-down to see our options.</p>
Options	<p>We can set it so that our question is Never required, required only During a Certification Attempt, or Always required in both the CGS and the Participant Folder.</p>
Require Answer 1	<p>The Never option is pretty self-evident; the system will not require an answer to the Local Use Question at any time.</p> <p>During a Certification Attempt is also pretty straightforward.</p> <p>The system will require an answer to the Local Use Question before saving the Demographics information in the Certification Guided Script, or CGS.</p> <p>It should be noted, however, that it will not require an answer in the Mid-certification Assessment Guided Script, or MCA GS, since this is considered an update to the Participant Folder and not a certification.</p>
Require Answer 2	<p>If Always is selected, there is one caveat to be aware of.</p> <p>The system will always require an answer in the CGS because Demographics must be updated and saved as part of the CGS requirements.</p> <p>However, it will only require an answer in the MCA GS if changes are made and saved in Demographics.</p> <p>It will also only require an answer in the Participant Folder if changes are made and saved in Demographics.</p>
During Cert	<p>We want to ask our pregnant women at their certification whether they would be amenable to a PHN visit, so we are going to select During a Certification Attempt.</p> <p>Go ahead and select it.</p>
Highlight	<no script>
Position	<p>Our last step is to decide in which position we want the question to display.</p> <p>There are six Local Use Questions on the Demographics AdditionalInfo1 tab.</p>
DemoAddInfo1	<p>The first question at the top is Position 1, the second Position 2, etc....</p>

	<p>The last question at the bottom is Position 6.</p>
1st Position	<p>If there were questions occupying other positions, those position radio buttons would be disabled.</p> <p>Since all of the positions are enabled, and we don't have any reason not to put this as our top question, let's select the 1st radio button.</p>
Not in Use	<p>The Not in Use radio button is always enabled.</p>
Not in Use 1	<p>This button is necessary since a question cannot be deleted once it is linked to a participant record and a part of their history.</p> <p>Essentially, it allows us to maintain a participant's history while providing the flexibility to be able to collect many more than six questions over time.</p> <p>Therefore, if at any time we decide we no longer want this question to display, we would select the Not in Use button.</p>
Text Field	<p>The Last Cleared/Reset is a text field that displays a date. We will discuss this a little later in this module.</p> <p>Let's click OK to save our question.</p>
Access	<p>Notice now that we have a question listed, the other buttons at the bottom of the screen are enabled.</p> <p>Also, our question is listed under Pregnant.</p> <p>The left side of the screen displays all Local Use Questions and Answers under their appropriate WIC category.</p> <p>So this is where we access our questions and answers whenever we need to add, edit or delete.</p>
Other Agency 1	<p>For instance, if we take a look at another agency's Local Use Questions, we can see that they have questions for each WIC Category.</p> <p>If we click on the + next to Breastfeeding...go ahead...</p>
Other Agency 2	<p>...we can see that they have two different questions for Breastfeeding women.</p>
Question ID	<p>Back to our Local Use Questions; notice that a unique Question ID was assigned by the system when we saved the question to the database.</p> <p>Notice also that the right side of the screen has been populated with information.</p> <p>The right side of the screen displays information that applies to the question or answer that is highlighted on the left side of the screen.</p> <p>So, now that we have a question defined, what do you think we should do next?</p>

Adding Answers

Add Answer	<p>Right. Let's add answers.</p> <p>Since the question we want to add some answers for is already highlighted in our tree view, go ahead and click the Add Answer button.</p>
First Answer	<p>The Add Local Use Answer dialog displays the question.</p>

Like the Question ID, the **Answer ID**, will not be auto-assigned by the system until we save our answer to the database.

Again, just like the Question field, the **Answer** field allows letters, numbers, and special characters, and has a limit of 50 characters.

Let's type in our first answer. Type: **Agreed to visits** and press the **Tab** key on the keyboard.

Active 1 The **Active** checkbox functions similarly to the **Do Not Use** radio button for questions.

Active 2 Once the answer has been selected and saved to a participant record, it cannot be deleted.

This allows us to maintain the history of our participant's answers even if the answer someday becomes obsolete.

We can stop the answer from displaying in our list of answers by de-selecting the **Active** checkbox at any time.

We have to select the **Active** checkbox to have our answer display. Go ahead and click it.

Sort Value The **Sort Value** allows us to list our answers in a designated order.

However, if we click the drop-down...go ahead...

Save Answer Our only option right now is 1.

The options will increase as we add each answer.

Let's click **OK** and save our new answer.

Answer Display Notice our answer is now displayed under its question on the left side of the screen.

Since it is highlighted, its information also displays on the right side of the screen.

And, the system has assigned the **Answer ID**, which can be used for reporting purposes.

Let's add another answer.

Go ahead and add another answer called **Declined visits** then click the **Active** checkbox.

Second Answer 1 <no script>

Change Sort Notice that the **Sort Value** has defaulted to 2.

What do you think we should do if we want **Declined visits** to display first in our answer list? Go ahead.

Select 1 <no script>

Highlight <no script>

Finish Sort Go ahead and save our new answer.

Change Display Notice that **Declined visits** is listed first under our question.

On the right side of the screen is the information pertaining to both the question and the highlighted answer.

What would we do to view information for the **Agreed to visits** question? Go ahead and display it.

Third Answer Yep. Information for whichever answer is currently highlighted displays on the right.

Let's add one more answer: **Not at this time**; leaving it **third** in the sort order. You know what to do. :)

Not Now <no script>

Save Answer 3 <no script>

In Sort Order <pause for animation>

Notice that this time our new answer displays at the bottom.

So the answers display under their respective question in their designated sort order.

Let's take a look at our new Local Use Question in the Demographics AdditionalInfo 1 tab of the participant folder.

Reset Before we do though, it is important to note that we should always Reset Local Reference data after making changes to our Local Use Questions.

Pregnant Woman Having already reset our local reference data...

Mama Bear is pregnant so we expect our question to display for her, and at the top of our Local Use Questions section...

...since we created the question for Pregnant women and assigned it to Position 1.

Let's click the drop-down to check out our answers.

Answers in PF As expected, our answers display as typed and in the order we designated.

What if we wanted to make changes to our questions or answers?

Let's go back to the Local Use Questions in System Admin and take a look.

Editing

Edit The first thing we have to do is enable the **Edit** button by selecting something to edit.

Let's edit our last answer: **Not at this time**. Go ahead and click on it to highlight it.

Click Edit Now that the **Edit** button is enabled, let's click on it.

Edit Answer1 When editing answers, we can edit the text, make it inactive or change its sort value.

Edit Answer2 It's important to keep in mind that when editing, we want to be careful not to change the meaning of what we are editing.

Right now, we are editing the answer "Not at this time".

We could edit this to have the same meaning by changing it to "Not now" or adding something to make it more descriptive, such as "Not at this time – create alert".

But we would not want to edit it and change it to “PHN already visiting” because this means something completely different from the original answer.

If we want to change the meaning, or the information being collected, then we should create a new answer.

If this answer is no longer applicable or wanted, we can make the answer inactive so that it no longer displays.

This way, we maintain an accurate history of the answers that are part of a participant’s permanent record.

Edit Answer3

So, we are going to expand our current answer and make it more prescriptive. Click to the right of our current answer.

Type

Type: **-create alert** and click the **OK** button.

New Answer

Our answer now reads: Not at this time-create alert...

PF New Answer

...and displays as such in the answer list of the Local Use Question after we, of course, Reset Local Reference Data.

Edit Question

What do you think we do if we want to edit our question? Go ahead.

Click Edit

<no script>

Edit Question1

When editing questions, we can modify the question text, change when we want to require an answer, and change which field it displays in.

Edit Question2

Again, when using the edit function, we never want to change the meaning of our question.

Remember, if that is our intention then we should create a new question.

If we no longer want to use this particular question, or it is no longer applicable, we should select the **Not in Use** radio button so that we accurately maintain the participant’s history.

Clear1

Another function available to us in the **Edit** window is the ability to **Clear/Reset Collected Answers**.

Clear2

This button essentially functions to remove any currently selected answers for this question.

When we click the button, the system sets the Date Reset value to the current date.

When the system is determining whether to display a previously selected answer for a Local Use Question in the Demographics AdditionalInfo1 tab, it will compare the date the answer was collected against the Date Reset.

If the answer date is before the reset date, the previously selected answer will not display. The system will then require a new answer be selected based on the **Require Answer** selection of Never, During a Certification Attempt or Always.

Clear3

Go ahead and click the **Clear/Reset Collected Answers** button.

Clear4

The date and time that the answers were cleared from the participant records displays.

Click the **OK** button to exit.

- Clear5** Notice the cleared date and time now display for the question.
And when we click on a question...go ahead and click on **Declined visits...**
- Clear6** ...it's also displayed for the answer.
There is one last function to take a look at: Delete.

Deleting

- Delete1** Questions and answers cannot be deleted once they've been associated with a participant record.
If an answer is selected for even one record, neither the question nor that answer can be deleted.
The Clear/Reset function does not remove the answer from the participant's permanent record; only from their current record.
So, using the Clear/Reset function does not allow you to delete answers that have already been answered.
Remember, for questions, we can select the **Not in Use** checkbox so that the question no longer displays.
While for answers, we can remove the checkmark from the **Active** checkbox.
Both of these functions allow us to effectively remove the question or answer from being viewed in the participant folder.
- Delete2** Since it is already highlighted, let's see what happens if we try to delete the **Declined visits** answer.
Click the **Delete** button.
- Delete3** The message displays indicating that the answer cannot be deleted.
Click **OK**.
- Delete4** Now try deleting the **PHN Visits** question.
- Delete5** <no script>
- Delete6** The message displays indicating that the question cannot be deleted.
Click **OK**.
- Practice1** So, what would we do if we didn't want the **Declined visits** option to display in our answer drop-down list? Go ahead.
- Practice2** <no script>
- Practice3** <no script>
- Practice4** <no script>
- Practice5** <pause for animation>
Notice that Declined visits no longer has a sort order and has been moved to the bottom of our list of answers.
- PF – No Answer** And, after resetting local reference data, our answer doesn't display in the PHN Visits answer drop-down.

Practice5A OK. So, what would we do if we no longer wanted our **PHN Visits** question to display on the AdditionalInfo2 tab in Demographics? Go ahead.

Practice6 <no script>

Practice7 <no script>

Practice8 <no script>

Practice9 <pause for animation>

Our question is no longer in use...

...and after resetting local reference data again, no longer displays in the AdditionalInfo2 tab in Demographics.

End Slide We appreciate you taking the time to review this HuBERT on-demand training module presented by the MN Department of Health WIC Program.