System Administration: Module 3 - Maintain Medical Clinics/Providers

SCRIPT

Description	Text
Introduction	This is Session 11: Module 3 of the HuBERT On-Demand Training provided by the Minnesota Department of Health WIC Program. This session focuses on the System Administration function for maintaining Local Agency Medical Clinics and Providers in HuBERT.
Module Objectives	Once we've reviewed this module, we will be familiar with how to add Medical Clinics and Medical Providers to the drop-down lists in the **Demographics AdditionalInfo1** tab in the clinic application.
	We will also know how to edit them, understand how and when we can delete them, and how to mark them as inactive so that they no longer display in the drop-down list.
	We will also be able to make them required fields in the Participant Folder and the Certification Guided Script, or CGS.
<TypeMedHome>	During the first two years of using HuBERT, the **Type of Medical Home** field in the **Demographics AdditionalInfo1 tab** was used to collect which medical clinic a participant went to for health care.
<NewFields>	The **Medical Clinic** and **Medical Provider Name** fields were added in Release 2.16.05 because the Type of Medical Home field was never intended to collect clinic information.
	It has many limitations including the fact that the list is the same for all MN agencies, it can only list 1000 options, and it has to be maintained by the State Office.
	Also, there wasn't a field to collect the name of a participant's medical provider.
	However, the **Medical Clinic** and **Medical Provider Name** fields allow us to collect this information from specific lists of those that provide services to the participants who belong to our agency.
	An additional benefit is that we can maintain our agency's own lists, without having to depend on the State Office.

Logging In	
SysAdmin	Medical Clinics and Providers are maintained in the System Administration module.
	We must have the appropriate rights to be able to work in this module, which means we have been assigned Role 10: LSA.
	If you haven't been assigned Role 10, and maintaining the medical clinics and providers are going to be your responsibility, you will need to have your coordinator submit a request to update your user profile using the **HuBERT User Request form** found on the CFH Forms and Applications - WIC Tools page of the MDH website.
	Please click the **Continue with Module** button.
<SysAdminIcon>	The System Administration icon is on the desktop of our HuBERT computer and looks like a yellow notebook.
	Go ahead and double-click the **System Administration** icon.
<AlreadyLoggedIn>	Since we've already logged into the clinic application today we won't have to login again.
	Although we can have the Clinic module open while working in the System Admin module, best practice is to work in only one module at a time.
<Location>	The **Location** drop-down displays because most of the System Admin functions are at an agency level.
	The agency or agencies we have access to will be listed in the Agency drop-down.
	We should select the Agency for which we want to maintain our medical clinics and providers.
	Since we only have access to Anoka, let's click the **OK** button.
<wait>	<no script>
<Functions>	<no script>
Add Medical Clinics	
<Clinics>	Our agency's lists of Medical Clinics and Medical Providers are maintained in two separate functions.
	Let's start by creating our Medical Clinics list.
	Double-click on **Maintain Medical Clinics.**
<highlight>	<no script>

<ClickAdd>	The first time we open the **Maintain Medical Clinics** screen, it will be empty.
	None of the clinics we've submitted to the State for the **Type of Medical Home** field will be auto-populated for us.
	What do you think the next step is?
	Yep. Go ahead and click the **Add** button or hit the **Enter** key on your keyboard.
<AddClinic>	The **Name** field in the **Add Medical Clinic** dialog has a limit of 50 characters.
	It accepts 4 special characters: commas, apostrophes, periods and hyphens.
	There is no limit to the number of medical clinics we can add for our agency.
	Each agency can determine its own guidelines for how their medical clinics are going to be entered.
	The **Active** checkbox, when selected, indicates that the clinic name should display in the **Medical Clinic** drop-down list in Demographics.
	Let's add: **HEALTH PARTNERS - ANDOVER** by typing it into the **Name** field then clicking the **OK** button or hitting the **Enter** key.
<NewClinic>	Once a medical clinic has been added, it will display in the **Maintain Medical Clinics** window.
	Again, the **Active** checkmark indicates it will display in our drop-down list so that it can be selected for a participant.
	The system automatically assigns and displays a unique ID number to each of our medical clinics.
	No two medical clinics in MN will have the same ID number so that it can be easily used for ad-hoc reporting purposes.
<td colspan="2" align="center">**Delete Medical Clinics**</td>
<ClickDelete>	We can only delete Medical Clinics that have never been selected for a participant.
	If we want to delete a clinic, we have to first highlight it in our list.
	We only have the one clinic, which is already highlighted, so go ahead and click the **Delete** button.
<NotDelete>	If we are able to delete, the following message displays to make sure we really want to delete the selected clinic.
	At this time, we don't want to, so click the **No** button.

<IDNotReassigned>	If we had clicked **Yes** on the message, the system would have removed our selected clinic from this list and the **Medical Clinic** drop-down list in Demographics.
	As a side note, once an ID number is assigned, it will not be reassigned even if a clinic it was assigned to is deleted.
	OK. So what happens if we try to delete a clinic that has been selected for a participant?
	Let's find out. Go ahead and close completely out of the System Admin module.
<ClickX>	<no script>
<Desktop>	<no script>
Reset Local Ref	When changes are made in LSA, we will need to reset our Local Reference Data if we are in the Clinic module at the same time we make changes in the System Administration module.
	If we aren't in the Clinic module (which is best practice), once we open it, the changes should automatically occur as part of the Local Reference Data update that occurs during startup.
<OpenHuBERT>	Go ahead and open HuBERT.
<Startup>	<no script>
<LocalRefData>	<no script>
<SelectAnoka>	We are working in Anoka so click **OK**.
<PptSearch>	Let's search for State WIC ID #: **106268**
<OpenPF>	Now let's open her folder and go to the **Demographics AdditionalInfo1** tab.
<ClickAddInfo1>	<no script>
<MedClinicDD>	The Medical Clinic we just added should be listed. Click on the drop-down.
<ClinicList>	Yep. There it is.
	Notice that by hovering our mouse over the drop-down, the highlighted selection displays the entire clinic name.
<HoverMouse>	<no script>
<SelectClinic>	Click on **HEALTH PARTNERS - ANDOVER** to select it.
<ClosePF>	Let's close Bailey's folder, save our change and exit the Clinic module.
<ClickYes>	<no script>
<ExitClinic>	<no script>
<OpenSysAdmin>	OK. Now let's go ahead and re-open the **Maintain Medical Clinics** function for Anoka.
<ManagerOpen>	<no script>
<ClickOK>	<no script>

<OpenMed Clinics>	<no script>
<TryDeleteAgain>	Well done!
	OK. Now that we've selected the Health Partners - Andover clinic for Bailey, let's see what happens when we try to delete it. Click the **Delete** button.
<UnableToDelete>	Exactly what we were expecting, right? Since the clinic is now part of a participant's record, we can't delete it.
	Click the **OK** button.
<EndDelete>	<no script>
Edit Medical Clinics	
<Edit>	So what do we do if we can't delete an option but don't want it to display in our **Medical Clinic** drop-down list anymore?
	Do you remember the **Active** checkmark?
	We just have to remove the checkmark if we don't want HEALTH PARTNERS - ANDOVER to display in our list anymore.
	We can open the edit dialog by either double-clicking on the clinic or by highlighting it and clicking the **Edit** button.
	Go ahead and open the **Edit** dialog.
<Remove Checkmark>	This is probably obvious but we can also use the edit dialog to correct spellings, change clinic names, etc.
	So let's remove the **Active** checkmark and see what happens.
<ExitEditDialog>	Click **OK** or hit the **Enter** key on your keyboard.
<AddAnother>	Notice the checkmark no longer displays in the Active column.
	Before we check out our Medical Clinic drop-down in the Participant Folder, let's add HEALTH PARTNERS - BLAINE and FAIRVIEW - ANOKA.
	Do you think you can add the two clinics on your own? Go for it.
<AddHP-Blaine>	<no script>
<ClickAddAgain>	<no script>
<AddFV-Anoka>	<no script>

\<3Clinics\>	Nice job!
	Notice there is a gap between the ID number assigned to our first clinic and the ID numbers assigned to the two we just added.
	Since the number is unique across the state, the numbers will probably not be completely sequential; gaps will occur as other agencies add their medical clinics or if clinics are deleted.
	OK. Now let's take a look at the Participant Folder.
	Instead of going through the whole process of closing the **System Admin** module and opening the **Clinic** module again, let's assume that;s just what we did.
\<NoClinicInField\>	Back in Bailey's folder again, notice that the Medical Clinic we had selected, HEALTH PARTNERS - ANDOVER, is no longer displaying in the field.
	This is because the clinic is no longer active.
	If we click on the drop-down we'll see that it is no longer a viable option. Go ahead.
\<Only2ClinicsListed\>	Only the two active clinics we just added are listed. Select HEALTH PARTNERS - BLAINE, close the folder and save our change.
\<ClosePFAgain\>	\<no script\>
\<SaveChanges\>	\<no script\>
\<SearchScreen\>	\<no script\>
Medical Providers	
\<WorksTheSame\>	Again, let's assume that we've closed the **Clinic Module** and re-opened the **System Admin** module.
	Maintain Medical Providers works in exactly the same way as **Maintain Medical Clinics**.
	Let's double-click on **Maintain Medical Providers** and take a quick look.
\<AddProviders\>	Let's add two medical providers: DR. WHO and DR. SEUSS.
	Again, the guidelines for how to format medical provider names is up to each individual agency.
	However, hot keys can be used for these fields and starting each one with "Dr." makes this functionality moot. So we do encourage you to list the providers by last name first.
	So with that in mind, do you think you can add Dr. Who and Dr. Seuss?
	We know you can add clinics and this works just the same. Go ahead.

<AddDrWho>	<no script>
<ClickAddAgain>	<no script>
<AddDrSeuss>	<no script>
<Same>	Good work! The ID numbers, Active checkbox, Edit and Delete all function exactly the same as we've already shown for Medical Clinics.
<ToReview>	To review:
	ID numbers are auto-assigned by the system. They are unique statewide and display in this window to allow for easy ad-hoc reporting. The numbers may not be sequential and if a provider has been added, assigned an ID number, then deleted, the system will not re-use that number.
	A provider can only be deleted if she or he has never been selected for a participant. Otherwise, she or he must be made inactive.
	The Active checkbox determines whether a name displays in the drop-down list in the clinic module.
	Once a name has been added, you can use Edit to remove the checkmark to make she or he inactive so that the provider no longer displays. You can also use Edit to correct or update the names.
<CloseProviders>	Go ahead and click **Close**.
<OpenNameList>	OK. We're back in Bailey's folder after closing the **System Admin** module and re-opening the **Clinic** module.
	Click on the **Medical Provider Name** drop-down list.
<SelectDrWho>	And our two providers are listed. Let's use a hot key to select Dr. Who. Hit the **W** on your keyboard.
<HotKeys>	Hot keys are a nice shortcut for long drop-down lists.
	Remember to keep this in mind when deciding on a format for the **Provider Names** and **Clinics.**
<td colspan="2" align="center">**Required Fields?**</td>
<AgencySettings>	Local Agencies can decide whether or not to require the **Medical Clinic** and/or the **Medical Provider Name** fields.
	If a field is required, it must be completed before saving changes to Demographics in the Participant Folder AND the Certification Guided Script (CGS).
	It is NOT an either/or option. If it's required for the CGS, it's required in the Participant Folder.
	The **Agency Settings** function is where we manage whether these fields are required. Go ahead and double-click on it.

<RequireMedClinic>	The **Require Medical Clinic** and **Require Medical Provider** checkboxes are found in the **Agency Preferences** section.
	The default is no checkmarks, which means that they are not required.
	Go ahead and make the **Medical Clinic** field required.
<Require Provider>	Let's also make the **Medical Provider** required.
<SaveAgency Settings>	Easy enough, right?
	Click **OK** to save our changes to our Agency Settings.
<ExitSysAdmin>	We are done with the **System Admin** module, so let's exit this screen.
<AddEmail>	Again, let's just assume we've performed all the appropriate steps between closing System Admin and opening a participant folder in HuBERT.
	OK. Now that we've made the **Medical Clinic** and **Medical Provider Name** fields required, let's see what happens when we make a change to the Participant Folder and don't select anything from these fields.
	We are going to quickly add an email address.
	Let's click the **AdditionalInfo1** tab so that we can make sure the fields are empty.
<FieldsEmpty>	Yep. The fields are empty.
	Go ahead and close the folder and save the changes.
<ClickYes>	<no script>
<FieldsRequired>	This message is what we expected, right?
	We won't be able to save changes to Demographics in either the Participant Folder or the CGS if these fields are required and not completed.
Questions	Do you have any questions about what we just reviewed? If so, please submit them via the HuBERT Questions/Feedback form on the MDH WIC website.
End Slide	This completes Session 11: Module 3 of the HuBERT On-Demand Training provided by the Minnesota Department of Health WIC Program.