

Demographics Script

Introduction

This HuBERT on-demand training module...

Intro1

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

PreDemo

The tab in the Participant Folder and the screen in the Guided Scripts are essentially the same so we'll primarily look at Demographics in the Certification Guided Script, or CGS.

Before we do that though, let's take a look at WIC Category in the Participant Folder.

WIC Category Changes

InfantChild

WIC Category changes do occur.

Infants are automatically changed by the End-of-Day process to children on the night before their first birthday so this is something we should never have to do.

Transition Slide

<transition to Participant Search screen>

InfantChild1

However, there have been instances when the Birth Date has been incorrectly entered and if this occurs, we would need to correct the date of birth and let HuBERT adjust the category.

Let's take a look at this. It's November 2017 and Lolly Popp's birthday was incorrectly entered as 2/19/16, which makes her a child, when it should have been 12/19/16. Let's correct this.

<no audio> Double-click on the **Birth Date** field.

InfantChild2

<no audio> Type **12/19/16** and press the **Tab** key on the keyboard.

InfantChild3

Notice that HuBERT automatically updated her WIC Category to infant.

Let's close the folder and save our change...

<no audio> Click the X in the top right corner to close Lolly's Participant Folder.

InfantChild4

<no audio> Click **Yes** to save the change.

Transition Slide

<transition slide to Lolly's re-calculated Participant Folder>

InfantChild5

If we were to re-open Lolly's folder, we would see that HuBERT has re-calculated her age as well.

We need to note that this type of change will affect more than just her WIC type, including health information, growth grids, risk factors, and food package, so we always want to be as accurate as possible when recording a participant's information.

Transition Slide

<transition slide to Pregnant woman's Participant Folder>

Pregnant

A pregnant woman's WIC Category cannot be changed unless she is recertified.

Let's try changing Carry Mehome to breastfeeding.

<no audio> Click the **WIC Category** drop-down.

<no audio> Select **Breastfeeding**.

<no audio – Message> The participant's WIC Category cannot be changed in this manner. A new certification will need to be completed.

<no audio> Click **OK**.

Transition Slide

<transition slide to Participant Search screen>

BFtoNBF

Breastfeeding women who are less than 6 months postpartum, who are no longer breastfeeding, can be changed to Non-Breastfeeding.

As we mentioned before, WIC Category intersects with Health Information, Food Package, Risk Factors, and growth grids and we'll see in making this change how some of these intersections occur.

BFtoNBF1

In the Health Information module, we'll talk about linking mom and baby's records. For now, we just need to know that this link allows HuBERT to update both mom and baby's food package and health information when we make this type of WIC category change.

We collect the same breastfeeding information for both mom and baby and these are the fields that will be affected by changing mom from breastfeeding to non-breastfeeding.

<no audio> Breastfeeding Now, Breastfeeding Amount, Reason(s) Stopped, Date Breastfeeding Verified, and Date Breastfeeding Ended.

<no audio> Click to continue with module.

BFtoNBF2

Let's take a look at this scenario.

Crystal Ball is fully breastfeeding Wally and is 3 months postpartum.

Since we are changing mom's WIC Type, we should open her folder first and make our changes. By keeping her baby's folder closed, we can ensure that HuBERT can make the necessary changes to both folders.

Keep in mind we may have already opened both their folders before we realized mom's WIC Type was changing because of clinic processes and flow and best practice is to simply close baby's folder if this occurs. – continue syncing.

So, let's open Crystal's folder.

<no audio> Double-click on Crystal Ball to open her participant folder.

BFtoNBF3

Go ahead and change her WIC Category from Breastfeeding to Non-Breastfeeding.

<no audio> Click the **WIC Category** drop-down.

<no audio> Select **Non-breastfeeding**.

This message lets us know that HuBERT has recalculated her Cert End Date from one year to 6 months.

<no audio> Click **OK**.

BFtoNBF4

We need to prompt HuBERT to save our WIC Category change and we can do that by changing tabs.

We are going to need to update mom's food package but for the sake of this training module we are going to take a look at the Certification History tab first.

So click on that tab.

<no audio> Click the **Certification History** tab.

<no audio> Click the **Yes** button to save our new WIC Category.

BFtoNBF5

The **Mother's WIC Category Change** only displays if changing a woman, who is less than 6 months postpartum, from Breastfeeding to Non-Breastfeeding, or much more rarely, Non-breastfeeding to Breastfeeding.

Essentially it provides us easy access to the fields in the linked infant's Health Information that would need to be updated.

It has automatically already changed Wally from Fully Breastfeeding to Not Breastfed and updated the Date BF Verified with the current date.

And we need to update those that HuBERT can't: Date BF Ended, Reason Stopped and Date Supplemental Feeding Began.

After discussion with mom, who couldn't remember specific dates but could tell us a general time-frame, we know that she started supplementing mid-September when she went back to work, and after that Wally seemed to be more interested in the bottle than breastfeeding so she quit breastfeeding sometime near the beginning of October.

Let's complete the fields accordingly.

BFtoNBF6

We'll start with the Date BF Ended.

<no audio> Double-click in the **Date BF Ended** field to insert the cursor.

Let's enter October 1 since mom doesn't remember the exact date but told us it was close to the beginning of October.

<no audio> Type **10/1/17** and click the **Reason Stopped** drop-down.

BFtoNBF7

Only one reason can be selected for the Reason Stopped, unlike in Health Information where we can multi-select reasons. Select the most appropriate reason and if other reasons should be selected we can do that later in the Health Information screen.

We aren't going to take the time in this module to look at the complete list, so let's just select **Baby Led** since mom told us Wally was more interested in the bottle than breastfeeding.

<no audio> Select **Baby Led**.

BFtoNBF8

Crystal told us she started supplementing mid-September so let's enter 9/15/17.

<no audio> Double-click in the **Date Supplemental Feeding Began** field to insert the cursor.

<no audio> Type **9/15/17** and click to the right of the scroll bar to see the rest of the fields.

BFtoNBF9

The last field, **Date Solids Were Introduced**, is not required so we've completed the information we need to in this screen. Let's click OK to save the information we've entered.

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

Since Wally was fully breastfeeding, he hasn't received any formula from WIC. The Select Formula screen displays so that we can choose a formula for his food package. Mom is OK with powdered Similac Advance. Click OK to save our formula selection.

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

BFtoNBF10

The next message lets us know that mom's food package has changed and that a default food package for a non-breastfeeding woman has been created, and will need to be tailored...but that's a lesson for a different training module. Go ahead and click OK.

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

BFtoNBF11

The **Certification History** tab, which provides details from the Certification Guided Script, now shows the current date as the End Date of her Breastfeeding certification period.

Now let's take a look at the Risk Factors tab.

<no audio> Click the **Risk Factors** tab.

BFtoNBF12

Unlike Cert History, in this screen we can see both the dates of the Breastfeeding and Non-breastfeeding portions of the 6-month certification period.

Lastly, let's take a look at Health Information.

<no audio> Click the **Health Information** tab.

BFtoNBF13

The information we completed in the WIC Category Change dialog, updated the **Infant(s) Born from This Pregnancy** screen. Go ahead and click that button.

<no audio> Click the **Infant(s) Born from This Pregnancy** button.

BFtoNBF14

Before we changed mom's WIC category, this screen indicated Crystal was currently fully breastfeeding and if we click to the right of the scroll bar...

<no audio> Click to the right of the scroll bar.

...that formula had not yet been introduced.

BFtoNBF15

After we completed the WIC Category Change dialog, the Breastfeeding Now checkbox and Breastfeeding Amount were updated and the October 1st date entered for the Date Breastfeeding Ended.

When we click to the right of the scroll bar...

<no audio> Click to the right of the scroll bar.

...we can see that the September 15th date was used to calculate Wally's age when formula was first introduced.

Go ahead and close this screen.

BFtoNBF16

<no audio – Crystal's Health Information displays>

BFtoNBF17

If we take a look at Wally's Health Information, we can see that his information was updated also.

BFToNBFGT

The last WIC Category change scenario is what to do if a breastfeeding woman more than 6 months postpartum is no longer breastfeeding.

It's October 24th. Katy Didd is no longer breastfeeding and about 10 months postpartum.

Go ahead and double-click to open her folder.

<no audio> Double-click on Katy Didd to open her participant folder.

BFToNBFGT1

Let's try to change her WIC Category.

<no audio> Click the **WIC Category** drop-down.

<no audio> Select **Non-breastfeeding**.

The message tells us that Katy is categorically ineligible and that we need to **terminate** the cert instead of changing the WIC Category.

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

Terminating the certification is important because the system will continue to suggest benefits for her, or if she was previously some-breastfeeding and not receiving benefits, incorrectly count her as participating. We could also potentially provide the incorrect food package for her baby.

So, let's terminate her cert.

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

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

BFToNBFGT2

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

<no audio> Select **Categorically Ineligible**.

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

Inelig. Letter

<no audio> Letter of Ineligibility.

<no audio> Click to continue.

Demographics - CGS

DemoCGS

So back to the Demographics. Again, we'll look at in the CGS.

<no audio> Click the **Demographics** link.

Demo1

Demographics displays both specific member and general household information, which is information that is the same for all members of the household.

We'll cover the member-specific fields first.

The **PMI #** is a participant's 8-digit Personal Medical Identification number assigned by MN Health care programs, which can be used to obtain proof of participation in these programs for adjunctive income eligibility.

Go ahead and enter **12345678** and then click the **Race/Ethnicity** button.

Race

Race/Ethnicity is required if it hasn't been completed and should be self-selected by the participant or proxy.

First, we need to select our participant's ethnicity. Beau's mom has indicated he is not Hispanic.

<no audio> Click the **No, Not Hispanic or Latino** radio button.

The **Tribe** drop-down becomes enabled if we select **American Indian or Alaskan Native**.

<no audio> Click the **American Indian or Alaskan Native** checkbox.

Once enabled, a selection is required from the **Tribe** drop-down.

<no audio> Click the **Tribe** drop-down arrow.

Race1

It is up our Local Agency whether or not we choose to ask our participant to identify a tribal affiliation.

We select **Other** if our Agency chooses **not** to collect Tribe information.

We select **Participant Declined** if we do collect Tribe information but our participant doesn't want to indicate a Tribe.

Let's close the drop-down.

<no audio> Click the **Tribe** drop-down arrow to close the drop-down.

Race2

And de-select the **American Indian or Alaskan Native** checkbox.

<no audio> De-select the **American Indian or Alaskan Native** checkbox.

Unlike Ethnicity, we can select more than one race if applicable. Let's select both **Asian** and **Black or African American** and save our selections.

<no audio> Click the **Asian** checkbox.

<no audio> Click the **Black or African American** checkbox.

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

PhysPres

Initial Contact is reviewed in its own module so let's move on to the **Physically Present** radio buttons.

This section is required and only enabled in the CGS. It allows us to indicate whether or not the participant is here, in person, for their certification.

On rare occasions, a participant may not be present. In these instances, we would select the **No** radio button.

<no audio> Click the **Physically Present – No** radio button.

Selecting No enables the Reason Not Present drop-down list. Let's take a look at the reasons.

<no audio> Click the **Reason Not Present** drop-down arrow.

Selecting an option from the **Reason Not Present** is all the documentation required as to why a participant is absent from their cert appointment.

Go ahead and close the list and indicate that Beau is here for his cert.

<no audio> Click the **Reason Not Present** drop-down arrow to close the list.

<no audio> Click the **Physically Present – Yes** radio button.

Demo2

The **Maiden Name** section is only enabled for women and does not need to be completed.

The **Living with Foster Parent(s)** checkbox should be selected if the participant, regardless of WIC Type, is currently in a foster home.

Although there is a Risk Factor, 903, associated with Foster Care, it is not auto-assigned by HuBERT since the risk factor is only applicable if the participant has entered foster care, or moved to a different foster home, in the last 6 months.

Every participant is required to provide proof of their identity at each certification.

<no audio> Click the **ID Proof** drop-down arrow.

IDProof

We'll just look at a couple of options requiring a little more explanation.

If a participant does not have proof of ID at their cert, we would select **PENDING PROOF**.

Transition Slide

<transition slide>

IDProof1

This option grants temporary eligibility, which limits benefit issuance to **one month**.

We should then create an alert to inform the next staff person that she will need to verify proof of identity before being able to issue another set of benefits.

Once the participant's ID has been verified, we would update the ID Proof in **the Participant Folder**, and be able to issue more benefits.

IDProof2

The **Known to Staff (recert only)** option can be selected **after** the initial certification.

Proof of ID, even if you know the participant, must still be verified at the first cert.

Visual personal recognition at subsequent contacts are acceptable and this option can then be selected.

<no audio> Click below the scroll bar.

The **Waiver Signed** option is different from pending proof.

If we select this, it means that the participant is currently in a situation whereby they are unable to provide proof of identity.

This is a rare occurrence but can be due to: fire, theft, disaster, migrancy, homelessness or another individual is obstructing them from providing the proof.

Transition Slide

<transition to Certification Notice>

IDProofCertNotice

In these instances, the Certification Notice should be printed and completed at the end of the certification.

The MN Operations Manual, or MOM, Section 5.2 can provide more information.

<no audio> Click to continue.

IDProof3

Mom provided Beau's MA card so let's select Health Benefits Card from the list.

<no audio> Select **Health Benefits Card**.

ResProof

Now let's take a look at information that once collected is the same for all members of a household, starting with **Residency Proof**.

<no audio> Click the **Residency Proof** drop-down.

The proofs are appropriate for verifying residential addresses and once selected for one household member, will default-select for other members being certified on the same date **or within the next 92 days**.

Otherwise, Residency Proof functions similarly to ID Proof in that it is required at every cert, is limited to benefits for one month when PENDING PROOF is selected, and in rare occurrences may require the participant to sign the waiver...

Transition Slide

<transition to Certification Notice>

ResProofCertNotice

...which is on the Certification Notice if they are unable to provide residency proof due to their current situation.

<no audio> Click to continue.

Homeless

Mom showed us her driver's license, so go ahead and select that from the drop-down.

<no audio> Select **Driver's License**.

The **Homeless** checkbox should be selected if the participant lacks a stable and regular night time residence.

If we select the homeless checkbox...

<no audio> Select the **Homeless** checkbox.

the **Residency Proof** is disabled since we cannot require proof of residency if the participant is currently homeless.

However, we should note, that we are still required to complete the residential and Mail address sections.

The **Date Verified** defaults to the current date. Any time changes are made to Demographics or we attempt to issue benefits, HuBERT will verify this date is no more than 30 days in the past.

If it has been more than 30 days, it will display a message indicating this and not allow any changes or benefit issuance until we've asked the participant if they are still homeless and update Demographics accordingly.

Homeless1

We are required to select from the **Fixed Nighttime Location** to indicate where the participant is currently staying.

Although the Homeless checkbox and date apply to the household, the location applies only to the individual since it may be possible that members in the same household will be staying at different locations.

Go ahead and click on the drop-down.

<no audio> Click the **Fixed Nighttime Location** drop-down.

These are the options the State has determined could apply to any situation.

We should select **OTHER** if none of the options seem to represent our participant's nighttime location.

This a type-able field whereby we can add options to the list. Don't do this! We should never add any additional options to this statewide drop-down list. If we think an option should be added, we can have our coordinator submit it to the State Office for consideration.

Go ahead and close the list.

<no audio> Click the **Fixed Nighttime Location** drop-down to close the list.

Lastly, by selecting the Homeless checkbox, HuBERT auto-assigns Risk Factor 801- Homelessness to members of the household.

Demo3

We should select the **Migrant** checkbox to indicate if the participant is a member of a family that has at least one individual whose principal employment is agriculture on a seasonal basis.

Again, when selected HuBERT auto-assigns Risk Factor 803 – Migrancy.

One **Email** address can be entered for a household.

It is used by HuBERT to send automated appointment reminders if our agency chooses to use this feature.

Address History is exactly what it sounds like...

<no audio> Click the **Address History** button.

it displays any previous residential addresses;

<no audio> Click to the right of the scroll bar.

mailing addresses;

<no audio> Click to the right of the scroll bar.

And who made the change and when.

Go ahead and close this.

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

We will probably never use the Copy Demographics function but let's take a look anyway.

<no audio> Click the **Copy Demographics** button.

The **Copy Demographics** button saves the **Insurance Type** collected for one member to other records in the household.

To save it to another member, we have to remember to select the **Replace Existing Information** checkbox.

That's the extent of its functionality so let's cancel out of this screen.

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

AdditionalInfo1 Tab

AddInfo1Tab

There are two subtabs to demographics: AdditionalInfo1 and AdditionalInfo2.

<no audio> Click the **AdditionalInfo1 tab**.

There are six Local Use Questions that can be used by our agency to collect individual participant information.

Agencies can choose whether to make HuBERT require them or not.

There are also six State Use Questions that can be used by the State Office to collect participant information.

These are never required by the system but our agency may require us to remember to answer them.

We do not use the **Disability**, **Type of Medical Home**, and **Medical Home** fields.

The **Medical Clinic** and **Medical Provider Name** drop-down lists are maintained by our agency and our agency can choose whether or not to require them.

Let's take a couple of minutes to look at the functionality behind the **Duplicate Participants** section.

Duplicate Participants

DuplicatePpts

As we mentioned in a previous module, there is a System Admin function that allows certain staff in our agency to identify and link duplicate records.

If we search for the duplicate record, this message displays and informs us of the ID we **should** use to look up the participant.

<no audio – message> This participant is a duplicate of 00007875.

Transition Slide

<transition to participant search with participant 7875>

DuplicatePpts1

This time, we've searched for 7875 so let's open Olive's folder.

<no audio> Double-click on Olive Branch to open her folder.

<no audio> Click **Yes** on the transfer message.

DuplicatePpts2

And open the AdditionalInfo1 tab.

<no audio> Click the **AdditionalInfo1** tab.

DuplicatePpts3

The duplicate record is listed in the Duplicate Participants section.

<no audio> Click to the right of the scroll bar to view the rest of the columns.

HuBERT does not have the capability of merging records so we can look at any pertinent historical data that may have been entered into the duplicate record by clicking View.

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

DuplicatePpts4

The duplicate record is a read-only version, which means no changes can be made.

Transition Slide

<transition to taskbar with buttons>

DuplicatePpts5

However, both records are open and can be viewed at the same time.

AdditionalInfo2 Tab

AddInfo2Tab

Let's take a look at the AdditionalInfo2 tab

If we need to change the Household Language, which we collect during Prescreen, we can do that here.

The Authorized Rep fields, which were most likely completed during Prescreen, display in this tab along with the names and relationships of two potential alternate reps.

This is read-only and can only be updated in the EBT Household Demographics screen, which we can access using the button on this tab.

The **Representative and Proxy History** button...

<no audio> Click the **Representative and Proxy History** button.

AddInfo2Tab1

...lists any changes to the authorized and alternate proxies...

<no audio> Click to the right of the scroll bar to view the rest of the fields.

<no audio> Click to the right of the scroll bar.

<no audio> Click to the right of the scroll bar.

<no audio> Click to the right of the scroll bar.

<no audio> Click to the right of the scroll bar.

...and who made the change, and when.

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

AddInfo2Tab1

The last section displays information about the current status of the participant's record, including the participant's prescreen date, most recent termination reason and date, or ineligibility reason and date, and their current priority.

Priority is calculated by HuBERT based on WIC Category and assigned risk factors and is generally not important but is necessary in case we are ever required to use waiting lists.

Transition Slide

<transition to end slide>

End

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