

# Prescreen

## Introduction

### Introduction

This HuBERT on-demand training module...

### Intro1

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

## Prescreen

### Prescreen1

All applicants must be prescreened in order to add them to the MN WIC database.

Completing the prescreen allows us to collect basic demographic information, assess income eligibility, assign a Household ID, and assign a State WIC ID.

## Create New Household

### NewHH

We create new households for applicants that have never been on MN WIC before.

We should always double-check to make sure an applicant doesn't already have a record. Often, someone will call and get prescreened and added to our database but never actually comes in for their appointment. Or, they were on WIC a couple of years ago so it doesn't occur to them that they aren't actually new to WIC.

To double-check this, we simply search Statewide for the participant by name and date of birth.

We are going to search Statewide for Last Name **Free**, First Initial **B**, and birth date **5/13/83**.

<no audio> Click the **Statewide** radio button.

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

### NewHHA

<no audio> Type **Free** into the Last Name field and either Tab or click into the First Name field.

## NewHHB

<no audio> Type **B** into the First Name field and either Tab or click into the Date of Birth field.

## NewHHC

<no audio> Type **5/13/83** into the **Date of Birth** field and start the search.

## NewHH1

Since no records were found, we are going to assume at this point that B Free is new and needs to be prescreened.

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

## NewHH1A

Let's click the **Create New Household** icon to start a prescreen for a new household.

<no audio> Click the **Create New Household** icon.

## NewHH2

We are going to prescreen Bea first, then her baby. So we'll just quickly enter her name and DOB.

The address should be where the participant is currently living, and cannot be a PO Box.

There are five WIC Categories, also often called WIC Type or WIC Status.

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

The five WIC types are: Breastfeeding, Child, Infant, Non-Breastfeeding and Pregnant. These are sometimes represented by their first letter.

Since Bea Free is breastfeeding, let's select that for her WIC Category.

<no audio> Select **Breastfeeding**.

Notice that when we selected our WIC Category, the gender defaulted to Female. This occurs if we pick any of the women categories.

The **County** defaults based on the clinic where we are working.

The City list is based on the county, so if the county isn't correct, we need to change it before selecting a city.

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

### NewHH3

<no audio> Select **CORCORAN**.

Since Corcoran spans multiple zip codes, we have to select the appropriate one from the list. Otherwise, if the city only has one zip code, it auto-populates.

<no audio> Select **55357**.

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

### NewHH4

The **Authorized Representative** section is not required so we will take a look at it when we prescreen Bea's baby.

We can enter a different mailing address, such as a PO Box, or copy the residential address.

<no audio> Click the **Same as Residence** button.

The VOC section pertains to transfers and will be reviewed in those modules.

We can collect two different phone numbers and enter a comment as to the type of phone and/or to whom the number belongs.

<no audio> Click into the **Telephone 1** field.

### NewHH5

The area code defaults based on the clinic and may need to be changed.

The **Initial Contact** is required but what it is and how to complete it is reviewed in the Initial Contacts for Meeting Processing Standards module. So, we'll just OK through the screen.

<no audio> Click the **Initial Contact** button.

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

### NewHH6

The Race/Ethnicity button will never be enabled in Prescreen so we can ignore it.

We can choose to assess income eligibility but any inputted information is **not saved** to the database.

Income eligibility is reviewed in the Income Assessment modules so we'll skip it for now.

**How Heard about WIC** is required. Let's take a look at the options.

<no audio> Click the **How Heard about WIC** drop-down.

<no audio> Click below the scroll bar to view the next set of options.

<no audio> Click below the scroll bar again to view the rest of the options.

<no audio> Select **Social Service Agency**.

The **Household Language(s)** section defaults to English.

We can indicate if a household will require language assistance by selecting the **Need Interpreter** checkbox.

In these instances, we should select the household's primary language for Language 1 and indicate if it's both read and spoken.

If another language is also read and/or spoken, such as English, we may want to select this from the Language 2 drop-down.

<no audio> Click the **Correspondence Preference** drop-down.

The only option for **Correspondence Preference** is **Spanish**, English does not need to be selected.

Selecting Spanish results in some documents being printed in Spanish.

<no audio – list of documents> Certification Notice, all appointment reminders (email, letter, and postcard), and the Breastfeeding Notice printed when issuing benefits to households with some-breastfeeding women more than 6 months postpartum.

<no audio> Click to Continue with Module.

## NewHH7

The **Clinic Assigned** defaults to the clinic we are working in.

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

All of our agency's clinics are listed and we can assign the participant to another clinic by selecting from the list.

<no audio> Click the **Clinic Assigned** drop-down to close the list.

The **On Completion** section indicates our next step.

Since we want to add Bea's baby, we don't want to open her participant folder or return to the participant list; we want to add another member to the household.

<no audio> Select the **Add Another Household Member** radio button.

Once we click OK to save our prescreen, HuBERT will assign a Household ID and State WIC ID, and add our new participant to the MN WIC database.

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

## AddHHMbr

Information that is the same for everyone in the household is auto-populated.

<no audio – list> Address, Authorized Representative, Mail, Telephone, How Heard about WIC, Clinic Assigned, and Household Language(s).

So, of course we'll have to add the baby's name.

(no audio – FREE, SCOTT)

Let's use the calendar to enter Scott's birth date, which was October 18<sup>th</sup>.

<no audio> Click the **Birth Date** calendar drop-down.

We should note that all date fields have calendar drop-downs.

All calendars have arrows that move the month backward and forward and a TODAY button.

<no audio> Select **18** on the calendar.

For infants and children, HuBERT is able to auto-select the WIC Category based on the date of birth.

However, unlike women, we have to select the Gender.

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

## AddHHMbr1

<no audio> Select **Male**.

We skipped the Authorized Rep section when completing mom's prescreen so we'll talk through it now.

The Authorized Representative, or proxy, is always the mother, if she is on WIC and part of the household.

If we prescreen mom first, the last and first name fields will auto-populate with her name for other members of the household.

Otherwise, it is usually the primary caregiver.

The **Relationship** isn't required but can be helpful.

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

We should select whatever best represents the authorized representative's relationship with a child in the household.

So, in most cases, we will select Mother.

<no audio> Click below the scroll bar to view the rest of the options.

<no audio> Select **Mother**.

We do not collect either **Marital Status** or **Register to Vote**, which is disabled for infants and children.

### AddHHMbr2

But enabled for women.

### AddHHMbr3

If our agency chooses to do so, we can collect the authorized rep's **Education Level**.

### AddHHMbr4

Even though we haven't completed the Initial Contact, let's click **OK** to save our prescreen.

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

<no audio – message> An entry is required for the Initial Contact.

HuBERT has validations throughout to ensure that required fields are completed before saving any changes to the system.

<no audio> Click **OK** on the message.

And highlights what still needs to be completed.

<no audio> Click the **Initial Contact** button.

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

The **Application Date** is the prescreen date and displays in the participant folder, which we'll see in another module.

We don't have any other household members to add, so we could open the HuBERT Appointment Scheduling screens if we wanted to schedule an appointment, but we aren't going to review that in this module. So, let's return to the participant list.

<no audio> Select the **Return to Participant List** radio button.

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

## AddHMbr5

If we needed to, we could still add another member to the Free household.

Let's look at one other thing, the Show Details panel.

<no audio> Click the **Show Details** button.

We wouldn't expect to see anything in Show Details, but we can tell if a participant has only been prescreened by all the N/As.

## Create New Member

### NewMbr

As we already know, we can also add new members to existing households.

However, we can't add new members if we are currently working in Statewide. Let's take a quick look at this scenario.

We've searched for Amanda Tory in Statewide by her Household ID. We are working at agency 241, clinic 89 and she is currently assigned to agency 421, clinic 214.

We'd like to add her baby to her household, but the **Create New Member** icon is disabled. This is because we are technically still in Statewide, and there are certain functions like this and scheduling appointments that we can't do while in Statewide.

Although we aren't going to review transfers in this module, we are going to have to transfer Amanda from her current agency, 421, to the agency we are working in, which is agency 241.

To do this, we simply open her participant folder.

<no audio> Double-click on Amanda Tory in the participant list.

<no audio – message> Do you want to transfer this participant to this clinic? This participant is transferring from another agency. Please update the physical and mailing address, if appropriate.

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

### NewMbr1

For this scenario, we're just going to close Amanda's participant folder.

<no audio> Click the X to close the Participant Folder.

## NewMbr2

Amanda is now assigned to Agency 241 and clinic 089.

However, we still can't add anyone to her household because we are still in Statewide. We need to search for her in Agency.

<no audio> Click the **Agency** radio button and start the search.

## NewMbr3

Now that we are working in Agency, we can add a new member to Amanda's household.

<no audio> Click the **Create New Member** icon.

## NewMbr4

<no audio> Click to Continue with Module.

# Potential Duplicate

## PotDupe

Although we can double-check by asking an applicant if they've been on WIC before and by searching the statewide database, it isn't fail-proof and sometimes duplicate records are created.

HuBERT has a system administration function called **Potential Duplicate Participants** that allows certain staff at our agency to identify a record as a duplicate and to link the records so that historical information can be viewed if necessary.

More information about viewing duplicate records is provided in the Demographics module.

## PotDupe1

We've just prescreened Amanda Tory as a breastfeeding woman.

## PotDupe1A

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

## PotDup1B

HuBERT will make a last-ditch effort to help us **not** create duplicate records.

If our new participant has the exact same first name, last name and date of birth as an existing participant, HuBERT displays the **Potential Duplicate Applicant/Participant** screen.



We can compare the information in this screen with information our new applicant is providing to see if they could be the same person.

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

## PotDupe2

We have two choices. We can **Complete Prescreening**, which will add Amanda as a new participant to the WIC database or we can select **Open Existing Folder**.

We select this option if we believe the Amanda Tory we just prescreened to be the same participant that already has a record in the WIC database. Let's assume she is.

<no audio> Click on the **Open Existing Folder** button.

## PotDupe3

The message lets us know that the address and telephone we entered into Prescreen doesn't match what we have in the participant folder and gives us the option to update the information.

Since we just entered this, we can assume it is the most recent information and the record should be updated.

<no audio> Click the **Yes** button to update the address and telephone number in the Participant Folder.

## PotDup4

Only the address and telephone fields are updated. Although we prescreened her as breastfeeding, we would have to start a new certification to change her WIC Category from Pregnant to Breastfeeding.

## End

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

*Minnesota Department of Health - WIC Program, 85 E 7<sup>th</sup> Place, PO BOX 64882, ST PAUL MN 55164-0882; 651-201-4404, [health.wic@state.mn.us](mailto:health.wic@state.mn.us), [www.health.state.mn.us](http://www.health.state.mn.us); to obtain this information in a different format, call: 651-201-4404*