RURAL DEVELOPMENT PROJECT POLICIES AND PROCEDURES	Issued by: RDP Compliance Officer, Laura Maudsley	Policy No.: **PRO 006**
		Effective Date: 9/2/2009
HUINET PROGRAM CREATION AND PARTICIPANT INPUT	Approved by: RDP Statewide Director Dan Regan	Revision No.: 1
		Supersedes Policy: N/A

I. PURPOSE: For the consistent management of RDP participant data to ensure accuracy in reporting project activities and outcomes.

II. STAFF RESPONSIBILITES: The Associate Statewide Director and each Island Director are responsible for ensuring compliance with this policy for their respective island projects.

III. HUINET USER AUTHORIZATIONS

A. Agency Administrator: Can add/remove/edit users and programs for their respective agency, and can only work with clients and programs from their agency.

B. Agency User: Can only work with programs designated by their agency administrator and with the clients participating in those programs.

IV. HUINET PROGRAM SET-UP PROCEDURES

A. Log into the Huinet with your user name and password.

B. You are now at the main menu. Check to see that you are logged into the correct island RDP or the State RDP. If you need to change to another island or to State, click on Logins on the menu on the left-hand side, then click on the appropriate RDP island or state where you are creating the program.

C. Click on Programs on the left-hand side menu.

D. Scroll down to the bottom of the list of programs, and click on Add a Program.

E. Fill in the following fields:

i. Program Name

a. First, enter the program number (e.g., 982S-6). If you do not have this number, contact the Statewide Program Support Associate at the Statewide office.

b. Next, enter the program name (e.g., Trade/Union/JourneyWorker Training).

c. Enter the CRN, if applicable (e.g., 28420).

d. Finally, enter the specific class name, semester/year and date (e.g., Confined Space 5/15/2006).

e. For this example, the final would read:
982S-6 Trade/Union/JourneyWorker Training -28420- Confined Space 5/15/2006

ii. Program Description—this will come directly from the program proposal in the grant application

iii. Outcomes—this also comes directly from the program proposal in the grant application
iv. Target Group—from the program proposal in the grant application.
v. Eligibility Criteria—from the program proposal in the grant application.
vi. Program Initiation Date—the date identified in the MOA
vii. Program Termination Date—the end date of the program listed in the MOA
viii. Select a funding source—Select the funding account for the program based on the program number. If the account is not on the list, contact the Associate Statewide Director at the Statewide office.
ix. Select a Form—Click on "US DOL form"
x. Select Services—Click on the box identifying the services that are program-specific
xi. Select Objectives—Click on the box identifying the proposed program-specific outcomes from the grant application
xii. Select Permissions—Select ALL or ONLY
xiii. Click "Save" to finish the program creation.

V. MAKING HUINET PROGRAM CHANGES

Once in the Huinet, select Programs on the left-hand menu. Choose the program that you want to work on. Go to the appropriate field and make the desired changes. Click on "Save" at the bottom of the screen to finalize your changes.

VI. DELETING A HUINET PROGRAM

Once in the Huinet, select Programs on the left-hand menu. Choose the program that you want to work on. Click on "Delete Program" and click "OK" when prompted in the next two dialog boxes. The program is now deleted.

VII. PARTICIPANT INPUT PROCEDURE FOR HUINET

- *You will already have created the program or course in the Huinet in order to add participants.*
- *Use the RDP Intake forms to enter individuals into the Huinet. Obtain copies of the class rosters from the campus registrar's office to verify student information.*

A. Log-in into the Huinet with your user name and password.
B. Make sure that you are in the island RDP or State RDP that you want to be.
C. Select Clients on the left-hand menu. Allow time for the client list to load.
D. In the drop-down box, select that program that you want to add participants to.
E. Click on "Add a Client."
F. On the "Add Client" screen, enter the first and last name of the participant you are adding, then click on "Save." A few different things may happen at this point:
   i. You are directed to the Confidentiality Release Form screen. The participant you are adding is considered a **new client.** Go on to Step G.
   ii. The next screen has two options: one is a name (with contact information) that matches the participant name you just entered; the other states: "add the client as a new Huinet client."
   If you reach this screen, it is recommended that you select Clients on the right hand menu and find the participant under the client list in order to ensure that you do not make a duplicate entry for that participant. If you find that the participant is not on the client list, go ahead and repeat the steps which brought you to #2 and then select "add the client as a new Huinet client." Go on to Step G.

iii. The final screen you may reach will state “This client may already be in the Huinet system. Enter more information to see if there is a match in the Huinet database.” Five options are listed:

a. Enter SSN
b. Or Enter Date of Birth
c. Or Enter Home Phone
d. Or Enter Work Phone
e. Add the client as a new Huinet client

If you reach this screen, it is recommended that you select Clients on the right hand menu and find the participant under the client list to assure that you do not make a duplicate entry for that participant. If the participant is not on the client list, go ahead and repeat the steps which brought you to #3 and then select “add the client as a new Huinet client.” Go on to Step G.

G. Confidentiality Release Form Screen—this is where you verify that the participant has signed the RDP Intake Form, giving their consent for the data to be included in the Huinet.

i. Select “Yes” if the participant did sign, then click “Save.”
ii. If the participant forgot to sign and you still need to obtain their signature, select “Pending,” and then click “Save.”
iii. If the participant chose not to sign, you cannot enter them into the Huinet because they did not give their consent.

H. Next, the Client Contact Information screen comes up.

i. Complete the following fields: First Name, Last Name, Mailing Address & Suite/Apartment, City, State, Zip, Island, Student ID#, Home Phone, Work Phone, and Cell Phone. Under the DOL/EEO data, complete the Date of Birth, Gender, Marital Status and Ethnicity fields.
ii. In the Program Eligibility section, click on the boxes relevant to that client and fill in any additional eligibility and verification notes.
If the participant record was already in the Huinet, make sure that you update the contact information as reflected on your most recent RDP Intake form. Please note the previous address and/or contact information under “Outcome Notes,” near the bottom of the Client Contact Information screen.
iii. The following fields are optional: Family Information, Veteran Status, Education Information, Current Employment Status, Employment Goals, Employment Plan, Service Provided, Outcomes and Outcome Notes. *The data for these fields is not captured on the RDP Intake form. If the information in these fields is required as a program outcome, you may need to have a separate participant application or intake sheet in order to collect this information. The data for eligibility should have been captured on the Intake Form. Forms can be custom designed to do so. DOL wants to see this information when they do a program audit. For example, if the eligibility is that they are a resident, a copy of their driver’s license should be stapled to the Intake Form.*

I. Click on “Save” to finish adding the participant to the program.

VIII. SCANNING IN PARTICIPANT ELIGIBILITY VERIFICATION DOCUMENTATION

Once you are logged into the Huinet, click on Clients on the left-hand menu. Select the client record you wish to make changes to (you can also do this step while you are first doing the input on a client). Click on “upload.”

IX. CHANGING PARTICIPANT INFORMATION

Once you are logged into the Huinet, click on Clients on the left-hand menu. Select the client record you wish to make changes to. Make the changes in the appropriate fields and click "Save" at the bottom of the page.

X. ADDING PARTICIPANT OUTCOMES

Once you are logged into the Huinet, click on Clients on the left-hand menu. Select the client record you wish to add outcomes to. Click on the appropriate outcomes for the participant in the "Outcomes" field, and add any relevant information into "Outcome Notes." When you are finished, click "Save" on the bottom of the page.

XI. DELETING A PARTICIPANT RECORD

A. Once you are logged into the Huinet, click on Clients on the left-hand menu.
B. Select the client record you wish to delete.
C. At the bottom of the page, click on "Completely Delete Client From Your Agency," and then click "OK."
D. Check the box(es) under "Confirm Deletion" then click on "Delete Client."
E. When prompted in the next dialog box, click "OK.