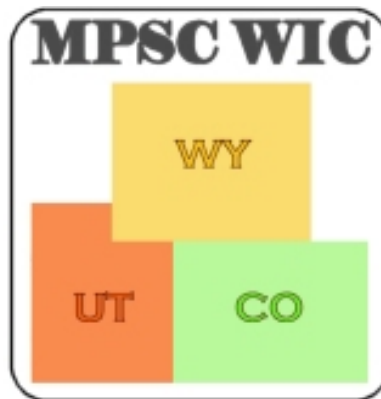

Mountain Plains States Consortium WIC System Project

DETAILED FUNCTIONAL DESIGN DOCUMENT CS 5 NUTRITION ED – CARE PLAN – BF EQUIPMENT SCREENS

Presented to:



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Document Revisions

Revision Date	Updated By	Requested By	Description of Revision

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1 Education and Care

The Education and Care branch node of the Clinic Services navigation tree offers options for recording nutrition education for participants, as well as creating participant and family care plans.

1.1 Nutrition Education

The Nutrition Education screen is used to record nutrition education topics that were discussed with a WIC Participant and the pamphlets that were provided. The View Current selection displays all of the active pamphlets provided for the recorded date. The View All selection displays all of the pamphlets provided to the participant for all recorded dates.

> *Education and Care* > *Nutrition Education*

<Family Header (See CS Overview)>

<Participant Sub-Header (See CS Overview)>

View Current

Record Dates: 01/03/2007 | 1 of 99 | New | Edit | Delete

Contacts Information
 Nutrition Education Contacts This Certification Period: 1
 Refused Nutrition Education Class

View Current | View All

High Risk Follow Up Appointment

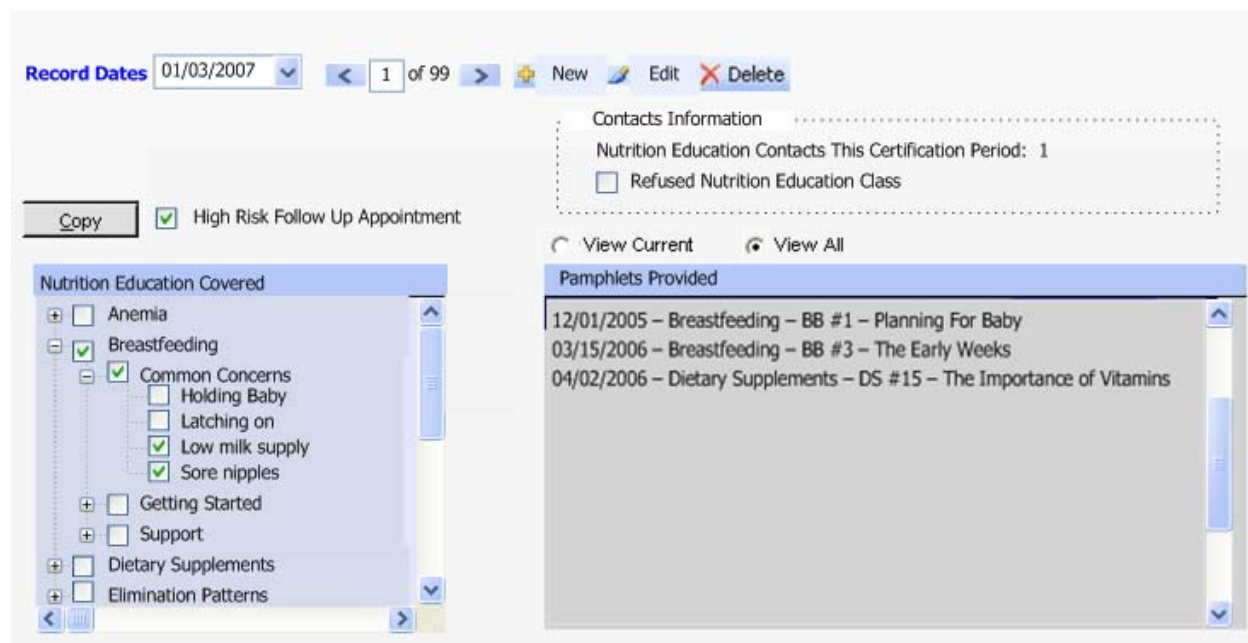
Nutrition Education Covered

- Anemia
- Breastfeeding
 - Common Concerns
 - Holding Baby
 - Latching on
 - Low milk supply
 - Sore nipples
 - Getting Started
 - Support
 - Dietary Supplements
 - Elimination Patterns

Pamphlets Provided

- Breastfeeding
 - BB #3 – The Early Weeks
 - BB #5 – Return to work/school
 - LS – Busy Moms
 - LS – Encouragement
- Dietary Supplements
- Elimination Patterns
- Exit Interview

View All



Note: Screen shot was not updated, but Certification Category is displayed above the Nutrition Education Covered grid, if applicable. See control table for additional details.

Control	Description
Record Dates	This is the date of the educational encounter between a WIC staff member and the participant. The drop-down and spin control allow selection of historical education encounters. When the New button is clicked, this date defaults to today's date. It cannot be updated by the user.
	Type Record Selector
	Contents Dates
	DB Column CompletedNtrEd.RecordedDt
New	The New command button is used to record nutrition education topics that were actually discussed with a participant. When New is clicked, all fields within the Completed Nutrition Education grid are cleared and enabled for update.
	Type Command Button
	Hot Key Alt + N
Edit	The Edit command button is used to update completed nutrition education data. Clicking the Edit button enables the Completed Nutrition Education grid, making it available for update.
	Type Command Button
	Hot Key Alt + T

Control	Description			
Delete	The delete command button is used to delete the nutrition education record.			
	Type	Command Button		
	Hot Key	Alt + D		
Copy	The Copy command button is used to copy the current nutrition education data (topics, sub-topics, counseling points, and pamphlets provided) from one family member's record to other family member's records. When the copy command button is selected a pop-up window is displayed; giving the user a chance to select family member record(s) into which the nutrition education information should be copied.			
	Type	Command Button		
	Hot Key	Alt + Y		
High Risk Follow Up Appointment	This check box is marked by the staff member when the nutrition education contact provided completes the High Risk follow up needed for this participant.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	CompletedNtrEd.HighRiskFollowUpIn		
Contacts Information: Nutrition Education Contacts This Certification Period:	This field indicates the number of nutrition education contacts that have occurred during the current certification period. The number of NE contacts is calculated by determining the number of unduplicated dates present in the nutrition education record that are greater than or equal to the current certification start date and do not have Refused Nutrition Education Class marked. This information is only displayed on the most recent nutrition education record.			
	Type	Text		
	Display Only	Yes	Calculated	Yes
	DB Column	CompletedNtrEd.RecordedDt		
Contacts Information – Refused Nutrition Education Class	This check box is marked by the system when a Nutrition Education Class participant status is marked as Refused.			
	Type	Check Box		
	Display Only	Yes	Calculated	No
	DB Column	CompletedNtrEd.RefusedIn		

Control	Description			
Certification Category	This read-only text displays the Certification Category of the infant or child participant.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Display as "Infant" or "Child"		
	Display Only	Yes	Calculated	No
	DB Column	Participant.ChildCertificationIn		
Nutrition Education Covered	<p>This tree view diagram displays a list of nutrition education counseling topics, sub-topics, and their associated counseling points. The sub-topics are grouped within nutrition education counseling topics. Nutrition education counseling topics and sub-topics are entered and associated through System Administration. See System Administration Clinic Services DFDD for more information.</p> <p>A check at the Topic level indicates that at least one Sub-Topic within the Topic has been selected. If a check is not present at the Topic level, no Sub-Topics have been selected for that Topic.</p> <p>A check at the Sub-Topic level indicates that at least one Counseling Point within the Sub-Topic has been selected. If a check is not present at the Sub-Topic level, no Counseling Points have been selected for that Sub-Topic.</p>			
	Type	Data Grid		
	DB Column	ParticipantCounselingPoint.NECP_ID CODE ID: Counseling Points – NutritionEducationCounselingPoint Topics = NutritionEducationTopic SubTopics = NutritionEducationSubTopics		
View Current	When View Current is selected, the Pamphlets Provided grid displays only pamphlets provided on the displayed Record Date. View Current must be selected to in order to add, update, or delete pamphlets.			
	Type	Radio Button		
	Required	NA		
	DB Column	NA		

Control	Description	
View All	When View All is selected, the Pamphlets Provided grid displays a list of all pamphlets that have been provided to this participant in the current local agency of the participant. When View All is selected pamphlets cannot be updated.	
	Type	Radio Button
	Required	NA
	DB Column	NA
Pamphlets Provided	This grid contains a listing of the active pamphlets that have been provided to a participant. Pamphlets are entered and associated with the nutrition education topics in System Administration. See System Administration Clinic Services DFDD for more information.	
	To record a pamphlet that was provided to a participant, the user marks the check box beside the pamphlet name. The user can also uncheck pamphlets if marked in error. The user may add, update, or delete pamphlets only when View Current is selected and after clicking the New or Edit buttons.	
	When View Current is selected, the grid displays a tree view of nutrition counseling topics. The topics can be expanded to show the associated pamphlets that are available. The name of the pamphlet is followed by a check box to allow users to indicate what specific pamphlets were provided on the Record Date. The list of pamphlets is a combined list of state and local pamphlets appropriate for that nutrition counseling topic.	
When View All is selected, all pamphlets provided to the participant over time are displayed in the grid. The pamphlets are recorded by date, category, and name. No updates can be performed when View All is selected.		
Type	Data Grid	
DB Column	If View Current is selected, display this column: Description = ParticipantPamphlet.NEP_ID If View All is selected, display these columns: Date = CompletedNtrEd.RecordedDt Topic = NutritionEducationTopic Description = ParticipantPamphlet.NEP_ID	

Control	Description			
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the nutrition education record are displayed.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of 'firstname lastname mm/dd/yyyy'		
	Display Only	Yes	Calculated	No
	DB Column	CompletedNtrEd.ModifyStfpID + CompletedNtrEd.ModifyDt		

Business Rules
<p>Family and Participant Header Rules</p> <ol style="list-style-type: none"> 1. Display Family Header information in the Tool Bar. 2. Display Participant Sub-Header at the top of this screen. 3. If View is set to Show Over Age and Deceased, then all participants (members with a WIC Status) are displayed in the Participant Record selector. 4. If View is set to not Show Over Age and Deceased, then only participants (members with a WIC Status) that are women, children < 5 years of age, and non-deceased participants are displayed in the Participant Record selector. 5. Participants appear in the record selector in age order, starting with the oldest. 6. Maintain the participant in the record selector when moving between screens. <p>General Business Rules</p> <ol style="list-style-type: none"> 7. A Record Date record requires at least one nutrition education topic must be identified in the Nutrition Education Topics Covered grid OR the Refused Nutrition Education Class checkbox must be checked for it to be saved. 8. A Record Date can not be saved with more than [parameter] nutrition education counseling points in the Nutrition Education Topics Covered grid, based on system parameter, ClinicServices.MaxNutritionEdPerDate. 9. When the Refused Nutrition Education Class checkbox is checked, no Nutrition Education Covered topics or Pamphlets Provided can be checked. 10. View Current is default when the screen is accessed. 11. When the View All is selected, disable the New, Edit, Delete, and Copy buttons. 12. The Nutrition Education Contacts This Certification Period is updated each time the user accesses the screen and when a Save is completed while the user is on the screen. The number is based on the Nutrition Education Contacts each certification period. 13. Nutrition Education Covered displays the English text of the "Ntr Edu Sub-Topics" codes and counseling points, grouped within the English text of the "Ntr Edu Topics" codes. The grouping is performed by selecting all rows of NtrTopics with NtrTopics.Status = "A". The ordering of the display is performed using Code.DisplaySeqNr of the sub-topic codes, ascending, within Code.DisplaySeqNr of the topic codes, ascending.

Business Rules

14. If the Topic (in the Nutrition Education Covered box) is selected, all Sub-Topics within the Topic will be selected. If a Sub-Topic is deselected, the Topic remains selected.
15. If the Topic (in the Nutrition Education Covered box) is deselected, all Sub-Topics within the Topic will be deselected.
16. If the Sub-Topic (in the Nutrition Education Covered box) is selected, all Counseling Points within the Sub-Topic will be selected. If a Counseling Point is deselected, the Sub-Topic remains selected.
17. If the Sub-Topic (in the Nutrition Education Covered box) is deselected, all Counseling Points within the Sub-Topic will be deselected.
18. When View All is selected, Pamphlets are sorted by date (most recent to oldest)
19. When the Family Care Plan Nutrition Education pop-up is closed, a new Nutrition Education record is created with a Record Date with today's date and the Nutrition Education Topics Covered: Family Care Plan is checked.
20. The Edit and Delete buttons utilize Today functionality.
21. When the family is saved and at least one NE topic has been added or updated in the family today, if there are any WIC appointments for this family for the current day that have a "Scheduled" or "Arrived" status, the system marks the appointments as Seen.
22. When creating a new record for Infants and Children <24 months old, display a warning message if no nutrition interview record is equal to today's date.
23. If the user attempts to move away from this family (go search for another family, go issue benefits for another family, etc.), the user is prompted with a Save confirmation message if any family data has been updated. Required fields are validated.
24. If the user checks a pamphlet for a topic not checked in the NE provided grid, display an informational message.
25. Display the Certification Category field based on the participant category and the child certification indicator.
 - a. If the participant was an Infant at the time the Nutrition Education record was created, then evaluate the Child Certification indicator.
 - i. If the Child Certification indicator was set to Yes before the Nutrition Education record was created, then display the field as Certification Category: Child.
 - ii. If the Child Certification indicator was set to No before the Nutrition Education Record was created, then display the field as Certification Category: Infant.
26. If "New" record, for Nutrition Education Covered tree view, filter nutrition topics based on the Participant Category or the Certification Category indicator.
 - a. For C, P, B, N participants, always use the current Participant Category.
 - b. For I participants, determine if the Certification Category indicator has been set.
 - i. If Yes, then display Child nutrition topics.
 - ii. If No or null, then display Infant nutrition topics.

Note: The record is "New" until it is saved, at which point, the record will be in view mode (and business rule 27 is in effect).

Business Rules

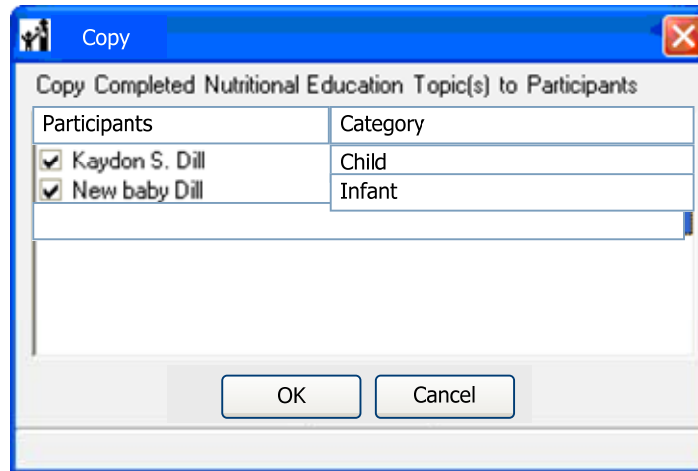
27. If a record is being viewed or edited, for Nutrition Education Covered tree view, display all nutrition topics, regardless of participant category.
28. For Nutrition Education Covered tree view, filter list of Nutrition topics to only those with sub-topics and counseling points.
29. If "New" record, for Pamphlets Provided tree view (View Current), filter nutrition topics based on the Participant Category or the Certification Category indicator.
 - a. For C, P, B, N participants, always use the current Participant Category.
 - b. For I participants, determine if the Certification Category indicator has been set.
 - i. If Yes, then display Child pamphlets.
 - ii. If No or null, then display Infant pamphlets.
30. If a record is being viewed or edited, for Pamphlets Provided tree view (View Current), display all nutrition topics, regardless of participant category.
31. For Pamphlets Provided tree view (View Current), display statewide and local agency pamphlets under the appropriate nutrition education topic, sorted in alphabetical order.
32. For Pamphlets Provided tree view (View Current), filter list of Nutrition topics to only those with pamphlets.
33. Enable the Copy button when there are topics to copy and when there are other active participants in the family.
34. Display an informational message if any or all nutrition topics, sub-topics, counseling points, or pamphlets selected for copy cannot be copied because of different participant categories.

Developer Notes

1. Save the local agency of the family at the time the CompletedNtrEd record is saved.
2. Use local agency of the family at the time the nutrition education was recorded to determine pamphlets to display for Pamphlets Provided (Current View).

1.1.1 Copy Nutrition Education Pop-Up

When the Copy button on the Nutrition Education screen is clicked, this selection pop-up appears. The user can select to copy nutrition education topics, sub-topics, counseling points, and pamphlets provided to other active participants in the family, if they are applicable to the participant category of the selected participant.



Control	Description			
Participants	The user can select which active participants in the family the nutrition education topics, sub-topics, counseling points, and pamphlets provided should be copied. By default, all check boxes are unchecked. The user can select as they desire.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	FamilyMember.FirstName, FamilyMember.MiddleName FamilyMember.LastName FamilyMember.LastNameSuffix		

Control	Description			
Category	The participant category of the associated participant.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	ParticipantType.ParticipantTypeCd or Participant.ChildCertificationIn		
OK	<p>Clicking the OK button causes the pop-up to close and returns the user to the Nutrition Education screen. A new nutrition education record is created (with today's date) for each participant that was selected to have topics, sub-topics, counseling points, and pamphlets provided copied to their record.</p> <p>Note: If the selected participants in the pop-up are different participant categories than the original participant, the system may not be able to copy all of the nutrition education topics, sub-topics, counseling points, and pamphlets to the selected participant's nutrition education records. This is because nutrition education topics are associated with specific participant categories and nutrition topics are associated with pamphlets in system administration. The system can only copy nutrition education topics, sub-topics, counseling points and pamphlets that are available for the participant category.</p>			
Type	Command Button			
Hot Key	Alt + O			
Cancel	Clicking the Cancel button causes the pop-up to close and returns the user to the Nutrition Education screen without creating any new Nutrition Education records for other family members.			
	Type	Command Button		
	Hot Key	Alt + L		

Business Rules
<ol style="list-style-type: none"> 1. Sort participant's names from oldest to youngest. If any participants have the same date of birth, then sort those participant's names alphabetically. 2. Display only the names of participants with WIC Status = Active in the Copy pop-up. 3. For Category, if the current participant category = Infant, then determine if the Certification Category indicator has been set. <ol style="list-style-type: none"> a. If Yes, then display Child. b. If No or null, then display Infant. c. For all other participants, display their current participant category.

Developer Notes
1.

1.2 Care Plan - Participant

This screen is used to record the participant’s Care Plan. A complete Care Plan consists of four components: Subjective, Objective, Assessment, Plan, and Goals. Some data for each of the components is auto-filled when a new care plan is created. The Plan is further divided into sections including nutrition counseling and pamphlets. Only the staff member who created the Care Plan may edit or delete it for up to ‘n’ days from the day the plan is created. A system parameter controls this ‘n’ number of days.

> Education and Care > Care Plan - Participant

<Family Header (See CS Overview)>

<Participant Sub-Header (See CS Overview)>

The screenshot displays the 'Care Plan - Participant' interface. At the top, it shows 'Record Dates' set to 11/15/2006, navigation buttons for 'New', 'Edit', and 'Delete', and a 'Print' button. The staff member is identified as 'Rose Singer' and the BF PC as 'Ann Apolis'. The 'Subjective' section contains text about previous goals and concerns. The 'Objective' section lists participant details like age, Hgb, BMI, and weight. The 'Assessment' section lists medical conditions and medication. The 'Counseling / Plan' section includes 'Topics' (Breastfeeding: Common Concerns, Low milk supply, Sore nipples) and 'Goals' (Drink to thirst, Increase water intake). The 'Pamphlets' section lists 'BB#3 - The Early Weeks' and 'BB#5 - Returning to work or school'. The 'Referrals' section lists 'Pam Shaw- Lactation Consultant' and 'Tri-County Family Planning'. A 'Links' box contains a 'Copy Goals' button. The 'Plan' section is currently empty.

Note: Screen shot was not updated, but Certification Category is displayed under the Staff Member control if it applies to this participant.

Control	Description	
Record Dates	This is the date a participant care plan was created. The drop-down and spin control allow selection of historical care plans. When the New button is clicked, this date defaults to today's date. It cannot be updated by the user.	
	Type	Record Selector
	Contents	Formatted date, mm/dd/yyyy
	DB Column	ParticipantCarePlan.RecordedDt
New	The New command button is used to record a new participant care plan. When New is clicked, the name of the user who clicked New is displayed in the Staff Member field. All required display-only data is loaded into the care plan. The portions of the Subjective, Objective, Assessment, and Plan fields that can be user-updated are cleared and enabled for update.	
	Type	Command Button
	Hot Key	Alt + N
Edit	The Edit command button is used to update a participant care plan. Clicking the Edit button enables the updateable portions of the Subjective, Objective, Assessment, and Plan fields for update.	
	Type	Command Button
	Hot Key	Alt + T
Delete	The Delete command button is used to delete the participant care plan record.	
	Type	Command Button
	Hot Key	Alt + D
Print	The Print command button causes the Care Plan Print pop-up screen to be displayed. The Care Plan Print screen is used to print one or more of the participant's care plans.	
	Type	Command Button
	Hot Key	Alt + P

Control	Description			
Staff Member	Contains the name of the staff member who created the care plan that is being displayed. This is a display-only field. For a new record, it is filled automatically with the name of the user who clicked the New button.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	StaffPerson.FirstName + StaffPerson.LastName + StaffPerson.LastNameSuffix		
Certification Category	This read-only text displays the Certification Category of the participant.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Display as "Infant" or "Child"		
	Display Only	Yes	Calculated	No
	DB Column	Participant.ChildCertificationIn		
Expand All History	Checking the Expand All History checkbox allows the user to view historical care plan data. The historical care plans are displayed in the Care Plan Grid in date descending order.			
	Type	Checkbox		
	DB Column	NA		
BF PC	This is the BF PC that is currently assigned to the family. This data is only visible from the most current care plan.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	BenefitFamily.BFPC_ID		

Control	Description			
Care Plan Grid (unlabeled)	<p>This is the portion of the screen where the details about the care plan are displayed. It contains the four components of a care plan, the Subjective, Objective, Assessment, and Plan sections.</p> <p>When the Expand All History checkbox is checked, the most recent care plan should be labeled as "Current – This care plan was done by [staff person name]". Additional care plans should be labeled as "mm/dd/yyyy – This care plan was done by [staff person name]".</p>			
	Type	Data Grid		
	Display	Yes		
Subjective (auto-assigned data)	<p>The auto-assigned portion of the "Subjective" section contains the most recent previous goal(s) and subjective data that is automatically supplied by the application from selected responses within the nutrition interview when New is clicked. This information is display-only and cannot be updated by the user.</p>			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	ParticipantCarePlan.SSystemSupplied		
Subjective (user-assigned data)	<p>The user-assigned portion of the "Subjective" section contains a text box where the user can add or update subjective data and comments. This text box is across the full width of the care plan display area.</p>			
	Type	Multi Line Text Box, limit 4000 characters		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	ParticipantCarePlan.SUserSupplied		

Control	Description			
Objective (auto-assigned data)	The auto-assigned portion of the "Objective" section contains objective data that is automatically supplied by the application when New is clicked. It is display-only and cannot be updated by the user. The data supplied is dependent on participant category and the dates of the data available.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	ParticipantCarePlan.OSystemSupplied		
Objective (user-assigned data)	The user-assigned portion of the "Objective" section contains a text box where the user can add or update objective data and comments. This text box is across one half the width of the care plan display area. It is situated on the left half.			
	Type	Multi Line Text Box, limit 4000 characters		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	ParticipantCarePlan.OUserSupplied		
Assessment (auto-assigned data)	The auto-assigned portion of the "Assessment" section displays all risks that have been identified for the participant along with any text box information that has been designated for the assessment portion. The risks are automatically supplied by the application when New is clicked. It is display-only and cannot be updated by the user. The risks are sorted in Risk number order.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	ParticipantCarePlan.ASystemSupplied		
Assessment (user-assigned data)	The user-assigned portion of the "Assessment" section contains a text box where the user can add or update assessment data and comments. This text box is across one half the width of the care plan display area. It is situated on the right half.			
	Type	Multi Line Text Box, limit 4000 characters		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	ParticipantCarePlan.AUserSupplied		

Control	Description			
Counseling / Plan – Topics – unlabeled grid	Topics is a group box within the larger Counseling/Plan group box. This group box is displayed in the top, left quadrant of the Counseling/Plan group box. Nutrition education topics, nutrition education sub-topics, and counseling points covered in today’s visit are auto-populated into the unlabeled grid. When New is clicked, each nutrition education topic, nutrition education sub-topic, and counseling point covered today is displayed on a separate row. The nutrition education topics are listed in alphabetical order.			
	Type	Read-Only Data Grid		
	Display	Yes, format as Nutrition Education Topic-Nutrition Education Sub-Topic-Counseling Point		
Counseling / Plan – Pamphlets – unlabeled grid	Pamphlets is a group box within the larger Counseling/Plan group box. This group box is displayed in the upper, right quadrant of the Counseling/Plan group box. When New is clicked, pamphlets provided in today’s visit for the participant are auto-populated into the unlabeled grid. Display each pamphlet on a separate row. Display in alphabetical order.			
	Type	Read-Only Data Grid		
	Display	Yes		
Counseling / Plan – Goals – Goal 1	Goals is a group box within the larger Counseling/Plan group box. This group box is displayed in the bottom, left quadrant of the Plan group box. There are three separate text boxes for three participant goals.			
	Type	Text Box		
	Required	Yes		
	Length	85		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	ParticipantCarePlan.Goal1		
Counseling / Plan – Goals – Goal 2	Goals is a group box within the larger Counseling/Plan group box. This group box is displayed in the bottom, left quadrant of the Plan group box. There are three separate text boxes for three participant goals.			
	Type	Text Box		
	Required	No		
	Length	85		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	ParticipantCarePlan.Goal2		

Control	Description			
Counseling / Plan – Goals – Goal 3	Goals is a group box within the larger Counseling/Plan group box. This group box is displayed in the bottom, left quadrant of the Plan group box. There are three separate text boxes for three participant goals.			
	Type	Text Box		
	Required	No		
	Length	85		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	ParticipantCarePlan.Goal3		
Counseling / Plan – Referrals – unlabeled grid	Referrals is a group box within the larger Counseling/Plan group box. This group box is displayed in the bottom, right quadrant of the Counseling/Plan group box. When New is clicked, referrals provided in today’s visit for the participant are auto-populated into the unlabeled grid.			
	Type	Read-Only Data Grid		
	Display	Yes		
Unlabeled column	Each Participant Referral provided today is displayed on a separate row. Display as “Organization Type-Organization”.			
	Format	Alphanumeric	Calculated	No
Counseling / Plan - Plan (user-assigned data)	This is a free-form text box where staff can record any additional plan information that is not already captured in Topics, Pamphlets, Goals, or Referrals.			
	Type	Multi Line Text Box, limit 4000 characters		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	ParticipantCarePlan.PUserSupplied		
Links - Copy Goals	This is a hyperlink to the Nutrition Education Goals selection pop-up window to be displayed. This is used to select which family members(s) records the user would like to copy the Goals to.			
	Type	Link		

Control	Description			
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the care plan record are displayed.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of 'firstname lastname mm/dd/yyyy'		
	Display Only	Yes	Calculated	No
	DB Column	ParticipantCarePlan.ModifyStfpID + ParticipantCarePlan.ModifyDt		

Business Rules
<p>Family and Participant Header Rules</p> <ol style="list-style-type: none"> 1. Display Family Header information in the Tool Bar. 2. Display Participant Sub-Header at the top of this screen. 3. If View is set to Show Over Age and Deceased, then all participants (members with a WIC Status) are displayed in the Participant Record selector. 4. If View is set to not Show Over Age and Deceased, then only participants (members with a WIC Status) that are women, children < 5 years of age, and non-deceased participants are displayed in the Participant Record selector. 5. Participants appear in the record selector in age order, starting with the oldest. 6. Maintain the participant in the record selector when moving between screens. <p>General Business Rules</p> <ol style="list-style-type: none"> 7. Default when the Expand All History is not selected is to display the most recent care plan. 8. Care Plan can only be edited or deleted by the Staff Member who created it. 9. The system parameter 'ClinicServices.CarePlanDays' contain these 'n' number of days that the care plan may be edited or deleted from the day it was created. The Edit and Delete buttons should only be enabled when the care plan is available to be edited. 10. If Expand All History is selected, disable the New, Edit and Delete buttons, the Copy Goals link, and blank out the Record Date and Staff Member. 11. When Expand All History is unselected, the user is returned to the care plan that was previously displayed. 12. When Expand All History is selected, the grid displays all recorded care plans in Care Plan Date descending sequence. An informational line separates each care plan. The informational line displays the record date and who did the care plan. 13. When New is clicked, fill in the auto-assigned Subjective, Objective, Assessment, and Plan sections appropriate to the participant's category with the most current data available, unless an exception is noted in other business rules. Put each different type of data on a new line. Include a carriage return/line feed in the stored data so that when the data is re-displayed at a future date, they will appear on individual lines again. If a piece of data does not exist, do not include a blank line on the screen.

Business Rules

14. Allow for sections of the care plan to expand vertically as needed to hold the data.
15. Allow for entire care plan screen to be scrollable (vertically) as needed.
16. Disable the Print button until at least one Participant Care Plan exists.
17. Disable the Copy Goals link until all required fields have been satisfied.
18. Display the Certification Category field based on the participant category and the child certification indicator.
 - a. If the participant was an Infant at the time the Care Plan record was created, then evaluate the Child Certification indicator.
 - i. If the Child Certification indicator was set to Yes before the Care Plan record was created, then display the field as Certification Category: Child.
 - ii. If the Child Certification indicator was set to No before the Care Plan record was created, then display the field as Certification Category: Infant.
19. When a new participant care plan is created, all subjective text from records with a record date equal to today's date is displayed in the subjective auto-assigned text box.
20. Subjective auto-assigned data includes:

For all participant categories

mm/dd/yyyy Previous Goals: [goal 1], [goal 2], [goal 3]
 [text box contents]
 [text box contents]
 [text box contents] etc.

If Pregnant, also include Interest in BF: Yes/No

If ParticipantType.ParticipantTypeCD = "P", Multi-line text box contents from Pregnant Interview:

InterviewPregnant.HealthMedicalTextbox1,
 InterviewPregnant.HealthMedicalTextbox2,
 InterviewPregnant.NutritionPracticesTextbox1,
 InterviewPregnant.NutritionPracticesTextbox2,
 InterviewPregnant.LifeStyleTextbox1,
 InterviewPregnant.BFPpreparationTextbox1,
 InterviewPregnant.BFPpreparationTextbox2,
 InterviewPregnant.SocialEnvironmentTextbox1.

If ParticipantType.ParticipantTypeCD = "B", Multi-line text box contents from BF Interview:

InterviewPPBF.BFSupportTextbox1,
 InterviewPPBF.BFSupportTextbox2, InterviewPPBF.BFSupportTextbox3,
 InterviewPPBF.BFSupportTextbox4, InterviewPPBF.HealthMedicalTextbox2,
 InterviewPPBF.HealthMedicalTextbox3, InterviewPPBF.NutritionPracticesTextbox1,
 InterviewPPBF.NutritionPracticesTextbox2,
 InterviewPPBF.NutritionPracticesTextbox3, Interview
 PPBF.NutritionPracticesTextbox4, InterviewPPBF.LifeStyleTextbox1,

Business Rules

InterviewPPBF.SocialEnvironmentTextbox1

If ParticipantType.ParticipantTypeCD = "N", Multi-line text box contents from NBF Interview:

InterviewPPBF.HealthMedicalTextbox1, InterviewPPBF.HealthMedicalTextbox2, InterviewPPBF.HealthMedicalTextbox3, InterviewPPBF.NutritionPracticesTextbox1, InterviewPPBF.NutritionPracticesTextbox2, InterviewPPBF.NutritionPracticesTextbox3, InterviewPPBF.NutritionPracticesTextbox4, InterviewPPBF.LifeStyleTextbox1, InterviewPPBF.SocialEnvironmentTextbox1

If ParticipantType.ParticipantTypeCD = "I", Multi-line text box contents from Infant interview:

InterviewInfant.NutritionPracticesTextbox1, InterviewInfant.NutritionPracticesTextbox2, InterviewInfant.HealthMedicalTextbox1, InterviewInfant.OralHealthTextbox1, InterviewInfant.LifeStyleTextbox1

If ParticipantType.ParticipantTypeCD = "C", Multi-line text box contents from Child Interview:

InterviewChild.HealthMedicalTextbox1, InterviewChild.OralHealthTextbox1, InterviewChild.LifeStyleTextbox1, InterviewChild.NutritionPracticesTextbox1, InterviewChild.NutritionPracticesTextbox2, InterviewChild.SocialEnvironmentTextbox1.

21. For objective data, only data from the most current record is displayed on the care plan. For example for infants, children and pregnant women, if the most current anthropometric record only has height (no weight), then only height data is displayed in the care plan.
22. For objective data, do not display data taken while a participant was certified as a different participant category except in the following instances:
 - If the most current blood or anthropometric data for a Not Breastfeeding woman is data collected while she was a Breastfeeding participant (associated with the same pregnancy), then display the data collected while she was a Breastfeeding participant.
 - If the most current blood or anthropometric data for a Child was collected while the participant was an Infant, then display the infant data.
23. Objective auto-populated data is based on the following:
 - a. If Participant Category = Infant and the Certification Category indicator = No or null, populate with Infant data as described below.
 - b. If Participant Category = Infant and the Certification Category indicator = Yes, populate with Child data as described below.
 - c. If Participant Category = Child, populate with Child data as described below.
 - d. If Participant Category = Pregnant, populate with Pregnant data as described below.
 - e. If Participant Category = Breastfeeding, populate with Breastfeeding data as described below.
 - f. If Participant Category = Not Breastfeeding, populate with Not

Business Rules

Breastfeeding data as described below.

Pregnant

If ParticipantType.ParticipantTypeCD = "P", display

Participant category: Pregnant

Age: 99 y

Hct: 99.99 Recorded On: MM/DD/YYYY

Hgb: 99.99 Recorded On: MM/DD/YYYY

Pre-pregnancy Weight: 999 lbs

Pre-pregnancy BMI: 99.99

Height: 99-9/9 inches Measurement Date: MM/DD/YYYY

Weight: 999-9/9 Lbs. Measurement Date: MM/DD/YYYY (use appropriate quarter pounds: ¼, ½, ¾.)

Weight Gained to Date: 999 lbs

Weeks Gestation: 99

EDD: mm/dd/yyyy

Where:

Age = today's date minus Participant.BirthDt

HCT = BloodWork.Hematocrit

Recorded On = BloodWork.RecordedDt

HGB = BloodWork.Hemoglobin

Recorded On = BloodWork.RecordedDt

Pre-pregnancy Weight = Pregnancy.MomPrepregWtLB

Pre-pregnancy BMI = Pregnancy.MomPrepregWtLB, Anthro.HeightInches
(Calculate BMI)

Height = Anthro.HeightInches

Measurement Date = Anthro.CollecteDt

Weight = Anthro.WeightLB

Measurement Date = Anthro.CollecteDtDt

Weight Gained to Date = Anthro.WeightLBS - Pregnancy.PrepregnancyWtLB

Weeks Gestation = (EDD minus Today's Date)/7 = # Weeks Remaining, rounded down to the nearest whole number, and then 40 minus # Weeks Remaining for Active or Pending Pregnant women. Calculation is based on information from the most recent pregnancy record.

Display NA if:

- The Pregnant woman has a WIC status that is something other than Active or Pending.
- The Pregnant certification is no longer active.
- If the Application.ApplicationDt < the Pregnancy.LastMenstrualPeriod.

EDD = Pregnancy.ExpectedDlvryDt

Business Rules**Breastfeeding/Not Breastfeeding**

If ParticipantType.ParticipantTypeCD = "B" or "N", display

Participant category: Breastfeeding or Not Breastfeeding

Age: 99 y

Hct: 99.99 Recorded On: MM/DD/YYYY

Hgb: 99.99 Recorded On: MM/DD/YYYY

Weight: 999-9/9 Lbs. Measurement Date: MM/DD/YYYY, (use appropriate quarter pounds: ¼, ½, ¾.)

Weight Gained: 999 lbs

Weeks postpartum: 99 (Display this through 3 months where 99 = the number of weeks postpartum)

Months postpartum: 99 (Display this after 3 months where 99 = the number of months postpartum)

Where:

Age = today's date minus Participant.BirthDt

HCT = BloodWork.Hematocrit

Recorded On = BloodWork.RecordedDt

HGB = BloodWork.Hemoglobin

Recorded On = BloodWork.RecordedDt

Weight: Anthro.WeightLBS

Measurement Date = Anthro.CollecteDt

Weight Gained = Pregnancy.WeightGained

Weeks post-partum = Today's Date - Pregnancy.ActualDeliveryDt / 7 for weeks

Months post-partum = Today's Date - Pregnancy.ActualDeliveryDt / 30 for months

Infant

If ParticipantType.ParticipantTypeCD = "I", display

Age: 99 m 99 d

Adjusted Gestational Age: 99 m 99 d

Breastfeeding status: xxxxxxxxxx (display if still breastfeeding)

HCT: 99.99 Recorded On: MM/DD/YYYY

HGB: 99.99 Recorded On: MM/DD/YYYY

Length: 99-9/9 inches Measurement Date: MM/DD/YYYY, use appropriate eighths of an inch: 1/8, ¼, 3/8, etc.)

Weight: 99-99 Lbs/Oz Measurement Date: MM/DD/YYYY

Head Circumference: 99.9 percentile

Weight for Length Percentile: 99.9 percentile

Weight for Age Percentile: 99.9 percentile

Length for Age Percentile: 99.9 percentile

Where:

Business Rules

Age = today's date minus Participant.BirthDt
 Adjusted Gestational Age is for premature infants.
 Breastfeeding Description = InterviewInfant.BFStatusCd
 HCT = BloodWork.Hematocrit
 Recorded On = BloodWork.RecordedDt
 HGB = BloodWork.Hemoglobin
 Recorded On = BloodWork.RecordedDt
 Length: Anthro.HeightInches
 Measurement Date = Anthro.CollectedDt
 Weight: Anthro.WeightLBS
 Measurement Date = Anthro.CollectedDt
 Head Circumference: Most recent percentile
 Weight for Length Percentile: Most recent percentile
 Weight for Age Percentile: Most recent percentile
 Length for Age Percentile: Most recent percentile
 Note: The Weight for Age and Length for Age Percentiles are based on chronological age unless Premature is marked on the Birth Measurement Anthropometric record. If Premature, then the adjusted age is used for these percentiles.

Child

If ParticipantType.ParticipantTypeCD = "C", display
 Age: 9 y 99 m
 Adjusted Gestational Age: 9 y 99 m (display data through 24 months of age)
 Breastfeeding status: xxxxxxxxxx (display if still breastfeeding)
 Hct: 99.99 Recorded On: MM/DD/YYYY
 Hgb: 99.99 Recorded On: MM/DD/YYYY
 Length (if recumbent measure) or Height (if not recumbent measure): 99-9/9 inches Measurement Date: MM/DD/YYYY, (use appropriate eighths of an inch: 1/8, 1/4, 3/8, etc.)
 Weight: 999-9/9 Lbs. Measurement Date: MM/DD/YYYY, (use appropriate quarter pounds: 1/4, 1/2, 3/4.)
 Head Circumference: 99.9 percentile
 BMI For Age Percentile: 99.9 (starting at 2 years of age)
 Weight for Length Percentile: 99.9 (before age 2 years)
 Weight for Age Percentile: 99.9 percentile
 Length for Age Percentile: 99.9 percentile (before age 2 years)
 Stature for Age Percentile: 99.9 percentile (starting at 2 years of age)

Where:

Age = today's date minus Participant.BirthDt

Business Rules

Adjusted Gestational Age = Age minus Weeks Gestation when Premature indicator is set

Breastfeeding Description = InterviewInfant.BFStatusCd

HCT = BloodWork.Hemotocrit

Recorded On = BloodWork.RecordedDt HGB = BloodWork.Hemoglobin

Recorded On = BloodWork.RecordedDt

Length = Anthro.HeightInches

Measurement Date = Anthro.CollecteDt

Weight = Anthro.WeightLBS

Measurement Date = Anthro.CollecteDt

BMI For Age Percentile = compute the percentile value for the most current Anthro record using the same formula as the percentile computation in the Child Body Mass Index (BMI) For Age Growth Chart

Display the Weight For Length Percentile if today's date minus Participant.BirthDt is less than 24 months. Otherwise display BMI For Age Percentile.

Weight for Age Percentile = compute the percentile value for the most current Anthro record using the same formula as the percentile computation in the Weight for Age Growth Chart

Length for Age Percentile = compute the percentile value for the most current Anthro record using the same formula as the percentile computation in the Length for Age Growth Chart

Stature for Age Percentile = compute the percentile value for the most current Anthro record using the same formula as the percentile computation in the Stature for Age Growth Chart

Note: The Weight for Age and Length for Age Percentiles are based on chronological age unless the child is <24 months old when the Care Plan is created and Premature is marked on the Birth Measurement Anthropometric record. If Premature, then the adjusted age is used for these percentiles.

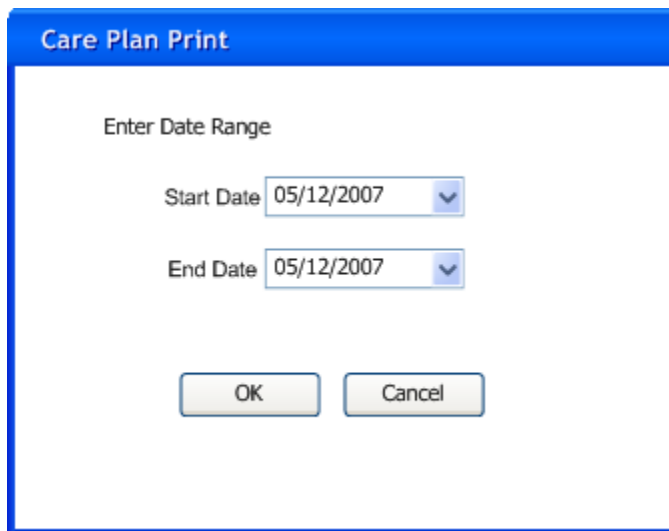
24. Assessment auto-assigned data is the English text of each RiskDet.NtrRiskCd that belongs to the most recently recorded Risk record for the participant.
25. If a risk is associated with a list box or text box in the interview (to show a specific medical condition), then the selected list box value or text box contents are displayed in the Assessment auto-assigned data portion of the participant care plan along with the risk.
- If the user attempts to move away from this family (go search for another family, go issue benefits for another family, etc.), the user is prompted with a Save confirmation message if any family data has been updated. Required fields are validated.

Developer Notes

1.

1.2.1 Care Plan Print Pop-Up

The Care Plan Print pop-up screen is used to print one or more participant care plans. This screen is accessed by clicking the Print button on the Care Plan - Participant screen. The user can print multiple care plans by adjusting the Start Date and End Date default values to create a range of dates for print selection.



Control	Description			
Start Date	The Start Date is the earliest Record Date that will be selected for printing when the OK button is clicked.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	ParticipantCarePlan.RecordedDt		
End Date	The End Date is the latest Record Date that will be selected for printing when the OK button is clicked.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	ParticipantCarePlan.RecordedDt		
OK	Clicking the OK button closes the Care Plan Print pop-up screen and returns the user to the Care Plan - Participant screen. The print occurs when OK is clicked.			
	Type	Command Button		
	Hot Key	Alt + O		

Control	Description	
Cancel	Clicking the Cancel button closes the Care Plan Print pop-up screen and returns the user to the Care Plan - Participant screen. No printing occurs.	
	Type	Command Button
	Hot Key	Alt + L

Business Rules
<ol style="list-style-type: none"> 1. Start Date cannot be greater than End Date. 2. If the Expand All History check box is not marked on the Care Plan - Participant screen, the Start Date and End Date are set by default to the Care Plan Date that was visible on the Care Plan - Participant screen. 3. If Expand All History check box is marked on the Care Plan - Participant screen, the Start Date and End Date are set by default to the most current Care Plan Date. 4. Allow user to print multiple care plans in one printing determined by the print selection date range. 5. Display error if no care plans are in the designated care plan date range.

Developer Notes
1.

1.2.2 Printed Participant Care Plan (Static)

The Printed Participant Care Plan consists of a header, along with subjective, objective, Assessment, and plan data.

1.2.2.1 Language: English

The printed Participant Care Plan is available in English only.

1.2.2.2 Printed Participant Care Plan Mockup

WIC Program - Participant Care Plan

Participant Name:	Stephanie Dill	Category:	Breastfeeding
Endorser's Name:	Stephanie Dill	LA-Clinic:	31-81
DOB:	12/01/1980	Family ID:	33453
WIC Status:	Active	Age:	26 years
Printed Date:	3/15/2007	CED:	2/20/2007
		Source:	WIC

Care Plan Date: 11/15/2006

Done By: Rose Singer

Subjective:

10/13/2006 Previous Goals: Increase servings of fruits to 2 times daily, Increase exercise to daily

Mom feels BF going well. Frequent, severe asthma attacks. Concern about some pain in teeth – no dentist., Always very thirsty, very little appetite, drinking 6 colas a day.

Objective:

BF PC: Ann Apolis
 Participant Category: Breastfeeding
 Age: 22 y
 Hgb: 13.2 g/dL, 11/10/2006
 Current BMI: 22.4
 Weight: 153 Lbs.
 Weight Gained: 23 Lbs.
 10 Weeks post-partum

Assessment:

211 - Elevated blood lead level (HR)
 312 - History of low birth weight infant
 322 - Closely spaced pregnancies
 360 - Other medical condition: Asthma requiring daily medication
 Medication limits absorption of Fe

Counseling/Plan:

Topics:
 Breastfeeding: Common Concerns – Low milk supply, Sore nipples

Pamphlets:
 BB#3 – The Early Weeks, BB#5 – Returning to work or school

Goals:

Drink to thirst
 Increase water intake

Referrals:
 Lactation Consultants - Pam Shaw
 Tri-County Family Planning

Plan:
 NA

Business Rules
<ol style="list-style-type: none"> 1. If more than 1 care plan is available in the selected print date range, insert a page break and start the next care plan on a new page. 2. When no data is available for an area, indicate NA. Exception: Include BF PC in Objective area only if a BF PC is currently assigned to a member of the family. 3. Under Counseling/Plan: Topics: List Nutrition Education Topic Covered with Mask of [Topic]: [Sub-topic]-[Counseling Point 1, Counseling Point 2, etc.] 4. If more than one Nutrition Education Topic, continue on the same line, separate with commas. 5. Under Counseling/Plan: Pamphlets: List the pamphlets supplied by the user in a line separated by commas. 6. Under Counseling/Plan: Goals: List each goal on a separate line. 7. Under Counseling/Plan: Referrals: List each referral organization on a separate line. Mask of [Organization Type - Organization Name] 8. The clinic services breastfeeding message image appears in the footer-middle of the output. 9. The clinic services header image appears in the header-left of the output. 10. Page numbering in the output should appear in the footer-right in the format "Page x of y". 11. This UI output is portrait. <ol style="list-style-type: none"> 12. Display Length (if recumbent measure) or Height (if not recumbent measure) as 99-9/9 inches. 13. For Infants, display Weight as 99-99 Lbs/Oz 14. For B, N, P, C, display Weight as 999-9/9 Lbs. (use appropriate quarter pounds: ¼, ½, ¾.)

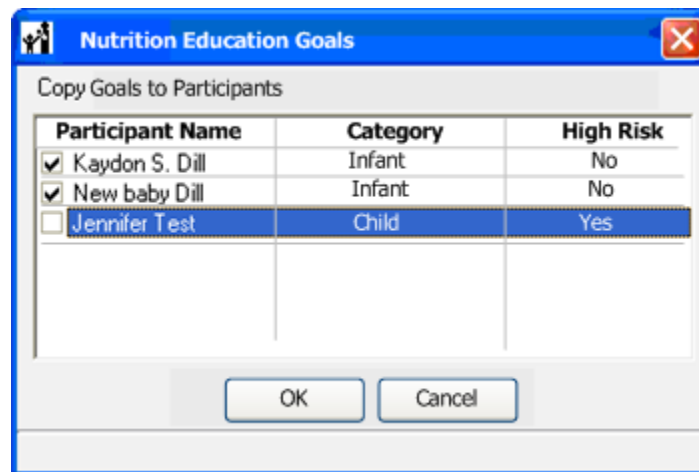
Developer Notes
<ol style="list-style-type: none"> 1. When printing a care plan or plans, print a header with the following information before any of the care plan data: Header of the Care Plan Participant Name: FamilyMember.FirstName, FamilyMember.MiddleName, FamilyMember.LastName, FamilyMember.LastNameSuffix Category: Participant.PartTypeCd Endorser’s Name: FamilyMember.FirstName, FamilyMember.MiddleName, FamilyMember.LastName, FamilyMember.LastNameSuffix, where FamilyMember.ParentGuardianIn = "Y". LA-Clinic: Clinic.FFLocalAgencyID "-" Clinic.FFClinicID where Clinic.ID =

Developer Notes
<p>FamilyClinic.Cln_ID</p> <p>Family ID: BenefitFam.FFFamilyID</p> <p>DOB: Participant.BirthDt</p> <p>Age: Today's date minus Participant.BirthDt, formatted as "NN m and NN d" if participant category = infant, "N y NN m" if participant category = child, and "NN y" if adult participant.</p> <p>WIC Status: Participant.WICStatusCd</p> <p>CED: Certification.EndDt</p> <p>Printed Date: system date</p> <p>Source: "WIC"</p> <p>Body of the care plan</p> <p>Care Plan Date: ParticipantCarePlan.RecordedDate</p> <p>Done By: StaffPerson.FirstName + StaffPerson.LastName + StaffPerson.LastNameSuffix</p> <p>Subjective</p> <p>Objective</p> <p>Assessment</p> <p>Counseling/Plan</p> <p>2. Select all rows of CarePlan for printing where ParticipantCarePlan.RecordedDt is between Start Date and End Date. For each CarePlan record that is printed, print ParticipantCarePlan.RecordedDt at the top, then print the following headings and data:</p> <p>Subjective</p> <p style="padding-left: 20px;">ParticipantCarePlan.SSystemSupplied</p> <p style="padding-left: 20px;">ParticipantCarePlan.SUserSupplied</p> <p>Objective</p> <p style="padding-left: 20px;">ParticipantCarePlan.OSystemSupplied</p> <p style="padding-left: 20px;">ParticipantCarePlan.OUserSupplied</p> <p>Assessment</p> <p style="padding-left: 20px;">ParticipantCarePlan.ASystemSupplied</p> <p style="padding-left: 20px;">ParticipantCarePlan.AUserSupplied</p> <p>Counseling/Plan</p> <p>Topics, Pamphlets, Goals, Referrals</p> <p style="padding-left: 20px;">ParticipantCarePlan.PSystemSupplied</p> <p>Plan</p> <p style="padding-left: 20px;">ParticipantCarePlan.PUserSupplied</p> <p>3. If multiple CarePlan records are selected for print, print a heavy dark line across the page between records with a couple of blank lines before and after the separator line.</p>

1.2.3 Nutrition Education Goals Pop-Up

When the Copy Goals link on the Care Plan - Participant screen is clicked, this selection pop-up appears. The user can select to copy all of the Participant Goals to any participants in the family.

Note: On the Nutrition Education screen, there is an opportunity to copy nutrition topics and pamphlets to other family member’s records. Referrals on the participant care plans are participant based, so only the goals will be copied to other family member’s records. The newly created care plan for other participants in the family will also include all of the system generated data specific for that participant that is created with a new care plan.



Mockup note: Please reference the business rules for display sort order, not the screen mockup. This note can be removed when final screen shots are added.

Control	Description			
Participant Name	The user can select which participants in the family the participant goals should be copied to. By default, all check boxes are checked. The user can deselect as they desire. Each row occurs for each participant in the family.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	FamilyMember.FirstName, FamilyMember.MiddleName FamilyMember.LastName FamilyMember.LastNameSuffix		

Control	Description			
Category	The participant category of the associated participant.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	ParticipantType.ParticipantTypeCd or Participant.ChildCertificationIn		
High Risk	This indicates whether or not the participant was determined to be High Risk on the Risk screen.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Yes/No		
	Display Only	Yes	Calculated	No
	DB Column	RiskHeader.HighRiskIn		
OK	Clicking the OK button causes the pop-up to close and returns the user to the Care Plan - Participant screen. A new Care Plan - Participant record is created (with today's date) for each participant that was selected to have goals copied to their record.			
	Type	Command Button		
	Hot Key	Alt + O		
Cancel	Clicking the Cancel button causes the pop-up to close and returns the user to the Care Plan - Participant screen.			
	Type	Command Button		
	Hot Key	Alt + L		

Business Rules
<p>Display of Pop-up</p> <ol style="list-style-type: none"> 1. For Category, if the current participant category = Infant, then determine if the Certification Category indicator has been set. <ol style="list-style-type: none"> a. If Yes, then display Child. b. If No or null, then display Infant. c. For all other participants, display the current Participant Category. <p>Care Plan Creation</p> <ol style="list-style-type: none"> 1. Create a new ParticipantCarePlan record for each participant in the family that has been marked on the pop-up.

Business Rules

- a. Populate the Care Plan just as if New had been clicked on the Care Plan – Participant screen. Refer to Care Plan – Participant earlier in this document for further explanation.
 - b. Make RecordedDt = Today's Date.
 - c. For each care plan created, populate ParticipantCarePlan.Goal1, ParticipantCarePlan.Goal2, and ParticipantCarePlan.Goal3 with the goals that were entered on the current participant's care plan.
2. Sort participant's names from oldest to youngest. If any participants have the same date of birth, then sort those participant's names alphabetically.

Developer Notes

- 1.

1.3 Care Plan – Family

The Care Plan – Family screen is an area for staff to record a care plan for the family. This is typically used when family members are not at high nutritional risk which would necessitate an individualized care plan. The look of the Family Care Plan is very similar to the participant care plan, but no subjective, objective, or assessment data is auto-populated into the care plan. Family goals recorded on the Family Care Plan are displayed on the Family screen. This display of goals is the most obvious way for clinic staff to know that there is a family care plan present. Only the staff member who created the Care Plan may edit or delete it for up to 'n' days from the day the plan is created. A system parameter controls this 'n' number of days.

> Education and Care > Care Plan - Family

<Family Header (See CS Overview)>

The screenshot displays the Family Care Plan interface. At the top, it shows 'Record Dates' as 11/15/2007, '1 of 99' records, and buttons for 'New', 'Edit', and 'Delete'. A 'Print' button is on the left, and 'Staff Member: Rose Singer' and 'Expand All History' are on the right. The 'BF PC: Ann Apolis' is listed below. The main content area is divided into several sections: 'Subjective' with a text box containing 'Breastfeeding is still going well and mom is starting to introduce a variety of foods to baby.'; 'Objective' and 'Assessment' with empty text boxes; 'Counseling/Plan Topics' with 'Infant Feeding' and 'Feeding Progression'; 'Pamphlets' with 'Feeding your baby: 6-8 months'; 'Goals' with three entries: 'Increase servings of fruits to 2 times daily', 'Increase exercise to daily.', and an empty field; and 'Referrals' with 'Valley SHARE' and 'Mid-States Pantry'. A 'Link' box on the left contains 'Nutrition' and 'Education'. Each section has a scrollable text area with navigation arrows.

Control	Description	
Record Dates	This is the record selector for the Family Care Plan records. It contains the recorded date. The drop-down and spin control allow selection of historical Family Care Plan records. When the New button is clicked, this date defaults to today's date. It cannot be updated by the user.	
	Type	Record Selector
	Contents	Formatted dates of "mm/dd/yyyy"
	DB Column	FamilyCarePlan.RecordedDt
New	Clicking the New button causes a new Family Care Plan to be generated.	
	Type	Command Button
	Hot Key	Alt + N
Edit	Clicking the Edit button allows the user to edit a care plan which they created.	
	Type	Command Button
	Hot Key	Alt + T
Delete	Clicking the Delete button causes the Family Care Plan to be deleted.	
	Type	Command Button
	Hot Key	Alt + D
Print	The Print command button causes the Care Plan Print screen to be displayed. The Care Plan Print screen is used to select the printing of one or more of the family's care plans.	
	Type	Command Button
	Hot Key	Alt + P
Links – Nutrition Ed	This is a hyperlink to the Family Care Plan Nutrition Education pop-up. See Family Care Plan Nutrition Education for more information.	
	Type	Link

Control	Description			
Staff member	Contains the name of the staff member who created the care plan. This is a display-only field. It is filled automatically with the name of the user who clicked the New button.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	StaffPerson.FirstName + StaffPerson.MiddleName + StaffPerson.LastName + StaffPerson.LastNameSuffix		
Expand All History	Checking the Expand All History checkbox allows the user to view historical care plan data. The historical care plans are displayed in the Care Plan Grid in date descending order.			
	Type	Checkbox		
	DB Column	NA		
BF PC	This is the BF PC that is currently assigned to the family. This data is only visible from the most current care plan.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	BenefitFamily.BFPC_ID		
Care Plan Grid (unlabeled)	<p>This is the portion of the screen where the details about the care plan are displayed. It contains the four components of a care plan, the Subjective, Objective, Assessment, and Plan sections.</p> <p>When the Expand All History checkbox is checked, the most recent care plan should be labeled as "Current – This care plan was done by [staff person name]". Additional care plans should be labeled as "mm/dd/yyyy – This care plan was done by [staff person name]".</p>			
	Type	Data Grid		
	Display	Yes		

Control	Description			
Subjective (user-assigned data)	The user-assigned portion of the "Subjective" section contains a text box where the user can add or update subjective data and comments. This text box is across the full width of the care plan display area.			
	Type	Multi Line Text Box, limit to 4000 characters		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	FamilyCarePlan.Subjective		
Objective (user-assigned data)	The user-assigned portion of the "Objective" section contains a text box where the user can add or update objective data and comments. This text box is across one half the width of the care plan display area. It is situated on the left half.			
	Type	Multi Line Text Box, limit to 4000 characters		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	FamilyCarePlan.Objective		
Assessment (user-assigned data)	The user-assigned portion of the "Assessment" section contains a text box where the user can add or update assessment data and comments. This text box is across one half the width of the care plan display area. It is situated on the right half.			
	Type	Multi Line Text Box, limit to 4000 characters		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	FamilyCarePlan.Assessment		
Counseling/Plan – Topics	Topics is a group box with a single text box within the larger Counseling/Plan group box. This group box is displayed in the top, left quadrant of the Counseling/Plan group box. Staff enter nutrition education topics covered in today's visit.			
	Type	Multi Line Text Box, limit to 150 characters		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	FamilyCarePlan.Topics		

Control	Description			
Counseling/Plan – Pamphlets	Pamphlets is a group box with a single text box within the larger Counseling/Plan group box. This group box is displayed in the top, right quadrant of the Counseling/Plan group box. Staff enter pamphlets provided at today’s visit.			
	Type	Multi Line Text Box, limit to 150 characters		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	FamilyCarePlan.Pamphlets		
Counseling/Plan – Goals – Goal 1	Goals is a group box within the larger Counseling/Plan group box. This group box is displayed in the bottom, left quadrant of the Counseling/Plan group box. There are three separate text boxes for three family goals.			
	Type	Text Box		
	Required	Yes		
	Length	85		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	FamilyCarePlan.Goal1		
Counseling/Plan – Goals – Goal 2	Goals is a group box within the larger Counseling/Plan group box. This group box is displayed in the bottom, left quadrant of the Counseling/Plan group box. There are three separate text boxes for three family goals.			
	Type	Text Box		
	Required	No		
	Length	85		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	FamilyCarePlan.Goal2		
Counseling/Plan – Goals – Goal 3	Goals is a group box within the larger Counseling/Plan group box. This group box is displayed in the bottom, left quadrant of the Counseling/Plan group box. There are three separate text boxes for three family goals.			
	Type	Text Box		
	Required	No		
	Length	85		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	FamilyCarePlan.Goal3		

Control	Description			
Counseling/Plan – Referrals – unlabeled grid	Referrals is a group box within the larger Counseling/Plan group box. This group box is displayed in the bottom, right quadrant of the Counseling/Plan group box. Family Referrals provided in today’s visit are auto-populated into the unlabeled grid. Each Referral provided today is displayed on a separate row.			
	Type	Read-Only Data Grid		
	Display	Yes		
Counseling/Plan – Plan (user-assigned data)	This is a free-form text box where staff can record any additional plan information that is not already captured in Topics, Pamphlets, Goals, or Referrals.			
	Type	Multi Line Text Box, limit to 300 characters		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	FamilyCarePlan.Plan		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the care plan record are displayed.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of ‘firstname lastname mm/dd/yyyy’		
	Display Only	Yes	Calculated	No
	DB Column	FamilyCarePlan.ModifyStfpID + FamilyCarePlan.ModifyDt		

Business Rules
<p>Family Header Rule</p> <ol style="list-style-type: none"> 1. Display Family Header information in the Tool Bar. <p>General Business Rules</p> <ol style="list-style-type: none"> 2. Default is to display the most recent care plan. 3. If the user attempts to move away from this family (go search for another family, go issue benefits for another family, etc.), the user is prompted with a Save confirmation message if any family data has been updated. Required fields are validated. 4. The Care Plan can only be edited or deleted by the Staff Member who created it. 5. The system parameter ‘ClinicServices.CarePlanDays’ contain these ‘n’ number of days that the care plan may be edited or deleted from the day it was created. The Edit and Delete buttons should only be enabled when the care plan is available to be edited. 6. Allow for sections of the care plan to expand vertically as needed to hold the data. 7. Allow for entire care plan screen to be scrollable (vertically) as needed.

Business Rules

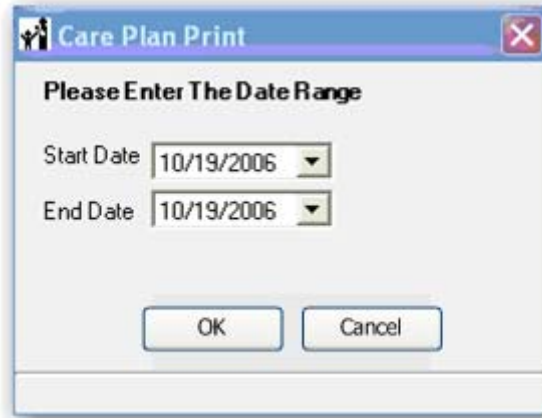
8. If Expand All History is selected, disable the New, Edit and Delete buttons and blank out the Record Date and Staff Member.
9. When Expand All History is not selected and the Record Date is not equal to today's system date, disable the Edit and Delete buttons.
10. When Expand All History is not selected, the Record Date is equal to today's system date, and the user is not the same user who created the record initially, disable the Edit and Delete buttons.
11. When Expand All History is selected, the grid displays all recorded care plans in Record Date descending sequence. An informational line separates each care plan. The informational line displays the record date and who created the care plan. Utilize the following headings.
 - Subjective
 - Objective
 - Assessment
 - Counseling / Plan
 - Topics
 - Pamphlets
 - Goals
 - Referrals
 - Plan
12. Disable the Print button until at least one Participant Care Plan exists
13. For Referrals: List each referral organization on a separate line. Mask of [Organization Type - Organization Name]

Developer Notes

- 1.

1.3.1 Care Plan Print Pop-Up

The Care Plan Print pop-up screen is used to print one or more family care plans. This screen is accessed by clicking the Print button on the Care Plan - Family screen. The user can print multiple care plans by adjusting the Start Date and End Date default values to create a range of dates for print selection.



Control	Description			
Start Date	The Start Date is the earliest Record Date that is selected for printing when the OK button is clicked.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	FamilyCarePlan.RecordedDt		
End Date	The End Date is the latest Record Date that is selected for printing when the OK button is clicked.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	FamilyCarePlan.RecordedDt		
OK	Clicking the OK button closes the Care Plan Print pop-up screen and returns the user to the Care Plan - Family screen. Printing occurs once OK is clicked.			
	Type	Command Button		
	Hot Key	Alt + O		

Control	Description	
Cancel	Clicking the Cancel button closes the Care Plan Print pop-up screen and returns the user to the Care Plan - Family screen without printing.	
	Type	Command Button
	Hot Key	Alt + L

Business Rules
<ol style="list-style-type: none"> 1. Start Date cannot be greater than End Date. 2. If the Expand All History check box is not marked on the Care Plan - Family screen, the Start Date and End Date are set by default to the Care Plan Date that was visible on the Care Plan - Family screen. 3. If Expand All History check box is marked on the Care Plan - Family screen, the Start Date and End Date are set by default to the most current Care Plan Date. 4. Allow user to print multiple care plans in one printing determined by the print selection date range.

Developer Notes
1.

1.3.2 Printed Family Care Plan (Static)

The printed Family Care Plan may be used to share family information with a health care provider or case worker if requested by the Endorser. The user selects to print a single family care plan or multiple care plans over a date range. See Care Plan Print.

1.3.2.1 Language: English

The printed Family Care Plan is available in English only.

1.3.2.2 Printed Family Care Plan Mockup

WIC Program - Family Care Plan

Endorser's Name: Laney Kelly Dillon
Printed Date: 03/15/2007

LA-Clinic: 31-81

Family ID: 33453
Source: WIC

Care Plan Date: 11/15/2007

Done By: Rose Singer

Subjective:

Breastfeeding is still going well and mom is starting to introduce a variety of foods to baby.

Objective:

BF PC: Ann Apolis

Assessment:

NA

Counseling/Plan:

Topics:

Infant Feeding, Feeding Progression

Pamphlets:

Feeding your baby: 6-8 months

Goals:

Increase servings of fruits to 2 times daily.

Increase exercise to daily.

Referrals:

Valley SHARE

Mid-States Pantry

Plan:

NA

Business Rules

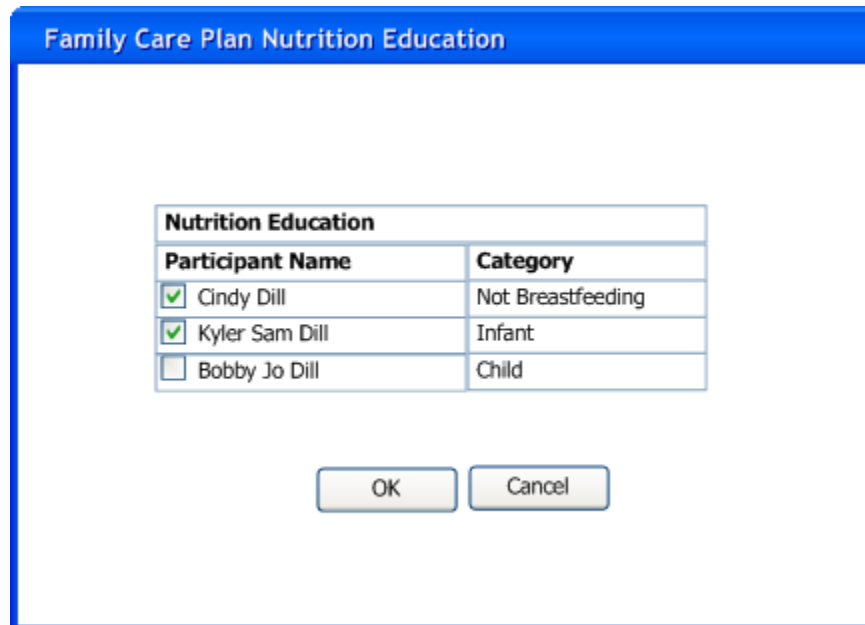
1. If more than 1 care plan is available in the selected print date range, insert a page break and start the next care plan on a new page.

Business Rules
<ol style="list-style-type: none"> 2. When no data is available for an area, indicate NA. 3. Include BF PC in Objective area only if a BF PC is currently assigned to a member of the family. 4. Under Counseling/Plan: Goals: List each goal on a separate line. 5. Under Counseling/Plan: Referrals: List each referral organization on a separate line. 6. The clinic services breastfeeding message image appears in the footer-middle of the output. 7. The clinic services header image appears in the header-left of the output. 8. Page numbering in the output should appear in the footer-right in the format "Page x of y". 9. This UI output is portrait.

Developer Notes
<ol style="list-style-type: none"> 1.

1.4 Family Care Plan Nutrition Education Pop-Up

This pop-up is used to designate which participants should have nutrition education credited for this contact. When marked on this pop-up, the staff do not need to go to the Nutrition Education screen to mark nutrition education.



Control	Description		
Nutrition Education	This data grid is used to identify which participants should have nutrition education credited for this contact.		
	Type	Data grid	
	Display	Yes	
Participant Name	The user can select which participants in the family have nutrition education credited from the Family Care Plan screen. By default, all check boxes are checked. The user can deselect as they desire. Each row occurs for each participant in the family. The list order is oldest to youngest. If any participants have the same date of birth, then they are ordered alphabetically.		
	Type	Check Box	
	Display Only	No	Calculated No
	DB Column	FamilyMember.FirstName, FamilyMember.MiddleName FamilyMember.LastName FamilyMember.LastNameSuffix and FCPNutritionEducation.Part_Id	
Category	The category of the associated participant.		
	Type	Text Box	
	Required	NA	
	Length	NA	
	Validation	NA	
	Display Only	Yes	Calculated No
	DB Column	FCPNutritionEducation.ParticipantTypeCd	
OK	Clicking the OK button causes the pop-up to close and returns the user to the Care Plan – Family screen. A new Nutrition Education record is created with a Record Date of Today's Date. Under Nutrition Education Topics Covered, Family Care Plan is checked.		
	Type	Command Button	
	Hot Key	Alt + O	
Cancel	Clicking the Cancel button causes the pop-up to close and returns the user to the Care Plan - Family screen.		
	Type	Command Button	
	Hot Key	Alt + L	

Business Rules
1.

Developer Notes
1.

1.5 BF Equipment

The BF Equipment screen is used to record tracking information about breastfeeding equipment or supplies that are given or loaned to a breastfeeding woman, including the type of equipment/supplies, serial number, along with documentation of who an item is being released to.

> Education and Care > BF Equipment

<Family Header (See CS Overview)>

<Participant Sub-Header (See CS Overview)>

Pregnancy Record Dates 10/29/2006 < 1 of 99 >

Record Dates 11/15/2006 < 1 of 99 > + New ✎ Edit ✖ Delete

Serialized Inventory Issuance

Category: Electric Breast Pump Rental Company: RH Medical Supplies

*Type: Medela Lactina *Contact/Return Date: 01/15/2007

*Serial Number: 12551-55 *Reason: Baby cleft lip

Signature

Add Row

Non-Serialized Items

Category	Item
Kits	Double Kit
Supplies	Pads

Documentation

*Proof of Identity: Driver's license

*Contact 1: Sally Boe, 321 Test Dr, Allendale, CO, 555-555-2222

Contact 2: Momma Lester, 432 Test Dr, Allendale, CO, 555-666-3333

Contact 3: Lola Moser, 334 Test Dr, Allendale, CO, 555-444-3343

Serialized Inventory Item Disposition

Reason: Returned Date: 01/17/2007

Comment: Needs Cleaned

Note: Mockup has not been updated, but there is a Remove Row button under the Add Row button for the Non-Serialized Items data grid.

Control	Description	
Pregnancy Record Dates	The pregnancy record navigator control is used to select a pregnancy record to view associated BF equipment records or to add a BF equipment record to the pregnancy. Records are sorted in descending order.	
	Type	Record Selector
	Contents	Dates of pregnancy records
	DB Column	Pregnancy.EffectiveDt
Record Dates	The date BF equipment (electric pump or other supplies) was issued to the family. When New button is clicked, this date defaults to today's date. It cannot be updated by the user. Records are sorted in descending order.	
	Type	Record Selector
	Contents	Dates that BF equipment has been issued
	DB Column	BreastPump.RecordedDt
New	Clicking the New button allows the user to record data about breastfeeding equipment given or loaned to a family. The Record Date is set to today's date by default and cannot be updated. All fields within the BF Equipment screen are cleared and enabled for update.	
	Type	Command Button
	Hot Key	Alt + N
Edit	The Edit command button is used to update BF equipment data. Clicking the Edit button enables all fields on the BF Equipment screen update.	
	Type	Command Button
	Hot Key	Alt + T
Delete	The Delete command button is used to delete the BF equipment record.	
	Type	Command Button
	Hot Key	Alt + D
Signature	Clicking the Signature button causes the Endorsers' signature to be automatically requested. The signature pad display is activated and text is displayed. A pop-up is seen by the WIC user that also displays the text shown on the signature pad and also allows for the signature to be reviewed and captured again if necessary. See Signature Capture for details.	
	Type	Command Button
	Hot Key	Alt + I

Control	Description			
Serialized Inventory Issuance - Category	The user selects a serialized inventory category to begin the issuance process.			
	Type	List Box		
	Required	No		
	DB Column	Not Stored		
	Code ID	SerializedInventoryCategory table lookup		
Serialized Inventory Issuance - Type	This is a filtered list of serialized inventory types.			
	Type	List Box		
	Required	Yes, if Category selected		
	DB Column	BreastPump.SIIH_ID		
	Code ID	SerializedInventoryType table lookup		
Serialized Inventory Issuance - Serial Number	A filtered list of Serial Numbers based on selected Type. Only those serial numbers that are available to be assigned are displayed.			
	Type	List Box		
	Required	Yes, if Type selected		
	DB Column	SerializedInventoryItem.ProductSerialNr		
	Code ID	SerializedInventoryItemHistory table lookup		
Serialized Inventory Issuance - Rental Company	If a Rental Company has been associated with the selected serial number, then it is displayed in this field.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	SerializedInventoryItem.RentalCompany		
Serialized Inventory Issuance - Contact/Return Date	This is the date that the serialized BF equipment item is expected to be returned to the clinic or when the staff plan to next contact the family about the item.			
	Type	Date Picker		
	Required	Yes, if Category selected		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryItemHistory.DueDt		

Control	Description	
Serialized Inventory Issuance - Reason	The Reason the serialized inventory breastfeeding equipment was issued.	
	Type	List Box
	Required	Yes, if Category selected
	DB Column	Breastpump.IssueReasonCd
	Code ID	Breast Pump Reason
Add Row	Clicking the Add Row command button creates a blank row in the grid for another non-serialized item to be entered in the grid.	
	Type	Command Button
	Hot Key	Alt + A
Remove Row	Clicking the Remove Row command button removes the selected row in the non-serialized items grid.	
	Type	Command Button
	Hot Key	Alt + R
Non-Serialized Items	The non-serialized breastfeeding items provided to the participant.	
	Type	Data Grid
	Display	No
Non-Serialized Items - Category	The category of non-serialized breastfeeding items available to record within the families' clinic or agency.	
	Type	List Box
	Required	Yes, for each row added to the Non-Serialized Items grid.
	DB Column	Not stored
	Code ID	NonSerializedInventoryCategory table lookup
Non-Serialized Items - Item	The item description of non-serialized breastfeeding items available to record within the families' clinic or agency.	
	Type	List Box
	Required	Yes, for each row added to the Non-Serialized Items grid.
	DB Column	BFSupply.NSIT_ID
	Code ID	NonSerializedInventoryType table lookup

Control	Description			
Documentation – Proof of Identity	Indicates the type of documentation that was provided to clinic staff as proof of identity for the selected participant.			
	Type	List Box		
	Required	Yes, if Category selected		
	DB Column	BreastPump.ProofOfIdentityCd		
	Code ID	Proof of ID		
Documentation – Contact 1	Area for staff to enter name, address and phone number of a contact in case the participant does not return the BF equipment.			
	Type	Text Box		
	Required	Yes, if Category selected		
	Length	100		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	BreastPump.Contact1		
Documentation – Contact 2	Area for staff to enter name, address and phone number of a contact in case the participant does not return the BF equipment.			
	Type	Text Box		
	Required	No		
	Length	100		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	BreastPump.Contact2		
Documentation – Contact 3	Area for staff to enter name, address and phone number of a contact in case the participant does not return the BF equipment.			
	Type	Text Box		
	Required	No		
	Length	100		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	BreastPump.Contact3		

Control	Description			
Serialized Inventory Item Disposition – Reason	The user selects a Reason of the serialized breastfeeding equipment’s disposition (i.e. returned, stolen).			
	Type	List Box		
	Required	No		
	DB Column	SerializedInventoryItemHistory.TransactionTypeCd		
	Code ID	Ser Inv CS Disposition This is the non-Editable code. Values include: Returned Lost Stolen Damaged Other		
Serialized Inventory Item Disposition - Date	The date that the serialized breastfeeding equipment’s disposition (i.e. returned, stolen) is recorded at the clinic.			
	Type	Date Picker		
	Required	Yes, if Serialized Inventory Item Disposition – Reason is selected		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryItemHistory.RecordedDt		
Serialized Inventory Item Disposition - Comment	The user indicates anything that is noteworthy about the equipment upon return.			
	Type	Text Box		
	Required	No		
	Length	100		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryItemHistory.Comment		

Control	Description			
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the breast pump record are displayed.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of 'firstname lastname mm/dd/yyyy'		
	Display Only	Yes	Calculated	No
	DB Column	Most recent of Breastpump.ModifyStfpID + Breastpump.ModifyDt or SerializedInventoryItemHistory.ModifyStfpID + SerializedInventoryItemHistory.ModifyDt		

Business Rules
<p>Family and Participant Header Rules</p> <ol style="list-style-type: none"> 1. Display Family Header information in the Tool Bar. 2. Display Participant Sub-Header at the top of this screen. 3. If View is set to Show Over Age and Deceased, then all participants (members with a WIC Status) are displayed in the Participant Record selector. 4. If View is set to not Show Over Age and Deceased, then only participants (members with a WIC Status) that are women, children < 5 years of age, and non-deceased participants are displayed in the Participant Record selector. 5. Participants appear in the record selector in age order, starting with the oldest. 6. Maintain the participant in the record selector when moving between screens. <p>General Business Rules</p> <ol style="list-style-type: none"> 7. New, Edit, Delete buttons disabled if ParticipantType.ParticipantTypeCD = "I" and "C." 8. New and Delete buttons are disabled if ParticipantType.ParticipantTypeCD = "N." 9. New, Edit, Delete buttons disabled if no Pregnancy record is available. 10. Allow "Anytime" security for users with Today functionality for this screen. 11. Serialized Inventory Issuance or at least one Non-Serialized Item is required. This is satisfied when the user selects a value in the Serialized Inventory Issuance – Category field or when the Non-Serialized Items – Add Row button is clicked. 12. Display available clinic serialized inventory items if the most recent status is New, Re-Added or Returned. 13. Display non-serialized inventory categories designated as BF Related for Participants in the Category list box in the Non-Serialized Items data grid. 14. Display non-serialized inventory items based on the Carry list (from Operations, Non-Serialized Inventory Level) for the clinic or local agency. 15. To determine items to display in Non-Serialized Items – Item list box, look at Non-serialized inventory Clinic record first. If no Clinic record, then look at Local Agency record. 16. Allow Non-Serialized Items data grid to be scrollable if needed.

Business Rules

17. Display error message if the Serialized Inventory Item Disposition Date (SerializedInventoryItemHistory.RecordedDt) is not greater than or equal to the Record Date (BreastPump.RecordedDt).
18. If Contact/Return Date (SerializedInventoryItemHistory.DueDt) has been established but not passed and no Disposition Date (SerializedInventoryItemHistory.RecordedDt) completed, then display BP in the indicator section of the participant header. Also set family alert.
19. Display error if Serial Number has been selected and no signature record has been collected.
20. If Contact/Return Date (SerializedInventoryItemHistory.DueDt) has passed and no Disposition Date (SerializedInventoryItemHistory.RecordedDt) is completed, then display BP in bold red font in the indicator section of the participant header. Also set family alert.
21. If the user attempts to move away from this family (go search for another family, go issue benefits for another family, etc.), the user is prompted with a Save confirmation message if any family data has been updated. Required fields are validated.
22. Until the Serialized Inventory Issuance Category column is selected, disable all associated Serialized Inventory Issuance fields (Type, Serial Number, Contact/Return Date, Reason) and Serialized Inventory Item Disposition fields (Reason, Date, Comment). If it is selected and then deselected, clear and disable these same fields.
23. Once a Serial Number has been issued (saved), disable the Category, Type and Serial Number. The Serial Number can be returned to inventory via the disposition fields.
24. Once a Serial Number has been disposed of (saved with a Reason), disable the Serialized Inventory Item Disposition fields (Reason, Date, Comment). This is required because once an item has been returned to inventory, it may have been issued to another participant.
25. Contact/Return Date (SerializedInventoryItemHistory.DueDt) cannot be less than or equal to Record Date (BreastPump.RecordedDt).

Developer Notes

1. When a serialized breast pump is assigned, a record is added to the serialized inventory history record with a status of issued.
2. When a serialized breast pump is returned, a record is added to the serialized inventory history record with a status of returned.
3. When a serialized breast pump is marked as not available for return, a record is added to the serialized inventory history record with the appropriate status based on the reason (lost, stolen, or destroyed).
4. Serialized Inventory: Issued uses Record Date as the Transaction Date
5. Serialized Inventory: Disposition Date uses Disposition Date as the Transaction Date.

1.5.1 Signature Capture – BF Equipment Release Pop-Up

Each time that a participant is provided serialized BF equipment a signature is required. A Signature button is on the BF Equipment screen to allow staff to collect a signature in the data system.

The first screen is an example of what is displayed on the signature pad display screen. The pop-up “Signature Capture to User” is displayed to the WIC system user so that they know what is on the signature pad display screen and then when a signature is captured, it can be reviewed here to determine if adequate or if another capture is required. For full details about this system component, see the Signature Capture section of the Clinic Services Overview DFDD.

I have read and understand my rights and responsibilities concerning WIC breast pumps/aids.
For Participant: Jane Doe

Signature _____

Cancel OK

Signature Capture to User

I have read and understand my rights and responsibilities concerning WIC breast pumps/aids.
For Participant: Jane Doe

Signature _____

Person Type ▾

No Signature Available Reason ▾

Repeat Capture Close