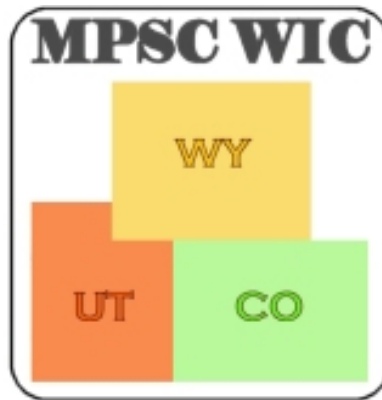


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# Mountain Plains States Consortium WIC System Project

## DETAILED FUNCTIONAL DESIGN DOCUMENT FM 1 FOOD MANAGEMENT SCREENS

*Presented to:*



Revision Date: January 7, 2011

*Prepared by*

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CO Contract #WIC0601052  
CIBER Project #CODPH00201

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## Document Revisions

Revision Date	Updated By	Requested By	Description of Revision

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# 1 Food

## 1.1 UPC/PLU Quick Search

The UPC/PLU Quick Search allows for a user to enter a UPC number and, if found, to immediately go to the UPC Detail screen.

> Food > UPC Quick Search

Control	Description			
UPC/PLU	The Universal Product Code (UPC) or price look up (PLU) for the detail product.			
	Type	Text Box		
	Required	Yes		
	Length	16		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	DetailProduct.UPC		
<unlabeled>	The check digit that will be calculated based on the root field. It is enterable (overlaid) even though it is calculated. See BR#4.			
	Type	Text Box		
	Required	Yes		
	Length	1		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	DetailProduct.UPC		

Control	Description	
Search	Clicking the Search button allows the user search for a UPC.	
	Type	Command Button
	Hot Key	Alt + S

Business Rules
<ol style="list-style-type: none"> <li>1. Display an error if the UPC number is not found.</li> <li>2. If the UPC is found, the UPC Detail Product: Detail screen is navigated to with the entered UPC data populated.</li> <li>3. If more than one UPC is found, choose the one that is currently effective and display an informational message about another occurrence existing.</li> <li>4. As the user tabs out of the UPC/PLU Number field calculate check digit. The check digit algorithm is the same regardless of the length of the UPC/PLU Number and is found in the System Overview Appendix.</li> </ol>

Developer Notes
1.

## 1.2 Category

The Category screen is used to update, add, deactivate, or view food categories in the system.

> Food > Category

Control	Description	
New	Clicking the New button allows the user add a new food category record.	
	Type	Command Button
	Hot Key	Alt + N

Control	Description			
Edit	Clicking the Edit button allows the user edit the displayed food category record.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + T		
Category	This is the record selector for the category records. It contains the category number and name. The drop-down and spin control allow selection of category records.			
	<b>Type</b>	Record Selector (Non-Date)		
	<b>Contents</b>	Category Number and Category Name, Mask of "99 xxxx".		
	<b>DB Column</b>	FoodCategory.Number + FoodCategory.Name		
Deactivate	A checkbox used to indicate that the category is deactivated.			
	<b>Type</b>	Checkbox		
	<b>DB Column</b>	FoodCategory.Status		
Category Name	The name of the food category.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	50		
	<b>Validation</b>	NA		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	FoodCategory.Name		
Category Number	The category number used to identify the category name. This number is used for display sequence purposes also.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Integer 2		
	<b>Validation</b>	Numeric, Mask of 99		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	FoodCategory.Number		
Infant Formula Category	A checkbox indicating whether this is a category that contains infant formulas. There are special business rules based on this checkbox through the system.			
	<b>Type</b>	Checkbox		
	<b>DB Column</b>	FoodCategory.FormulaIn		

Control	Description			
Exempt Infant Formula	A checkbox indicating whether this is a category that contains all exempt infant formulas.			
	<b>Type</b>	Checkbox		
	<b>DB Column</b>	FoodCategory.ExemptInfantFormulaIn		
WIC Eligible Medical Food	A checkbox indicating whether this is a category that contains all WIC eligible medical foods.			
	<b>Type</b>	Checkbox		
	<b>DB Column</b>	FoodCategory.MedicalFoodIn		
Cash Value Voucher	A checkbox indicating whether this is a category that contains all cash value voucher foods.			
	<b>Type</b>	Checkbox		
	<b>DB Column</b>	FoodCategory.CashValueVoucherIn		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this food category record is displayed.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	NA		
	<b>Validation</b>	Mask of 'firstname lastname mm/dd/yyyy'		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	FoodCategory.ModifyStfpID + FoodCategory.ModifyDt		

<b>Business Rules</b>
<ol style="list-style-type: none"> <li>1. Display error message if category name is not unique.</li> <li>2. Display error message if category number is not unique.</li> <li>3. When the Infant Formula Category box is not checked, the Exempt Infant Formula is disabled (and is unchecked, if it was checked).</li> <li>4. When the Infant Formula Category box is checked, the Exempt Infant Formula is enabled.</li> <li>5. When the Cash Value Voucher is checked, the other checkboxes are cleared and disabled.</li> <li>6. When the Infant Formula Category box is checked, the Cash Value Voucher is cleared and disabled.</li> <li>7. When the WIC Eligible Medical Food box is checked, the Cash Value Voucher is cleared and disabled.</li> </ol>

<b>Developer Notes</b>
1.

### 1.3 Subcategory

The Subcategory screen is used to update, add, deactivate, or view food subcategories in the system.

> Food > Subcategory

The screenshot shows the 'Subcategory' screen with the following fields and values:

- Category: 01 Milk
- Subcategory: 001 Whole Milk
- Subcategory Name: Whole Milk
- Subcategory Number: 001
- Rules UOM: Ounce
- Minimum Issuance: 1
- Multiplier Issuance: 1
- Formula Reporting Type: (empty)
- Manufacturer: (empty)
- Auto Split across FIs:
- Infant Food:

Control	Description	
Category	This is the category of the subcategory. It acts as a filter for accessing subcategory records and, when in edit mode, as a list box for associating new subcategory records to their category.	
	<b>Type</b>	List Box
	<b>Required</b>	Yes, Category Number and category Name, Mask of "99 XXXX".
	<b>DB Column</b>	FoodCategory.CategoryNr
	<b>Code ID</b>	FoodCategory table lookup
Subcategory	This is the record selector for the subcategory records. It contains the subcategory number and name. The drop-down and spin control allow selection of subcategory records.	
	<b>Type</b>	Record Selector
	<b>Contents</b>	Subcategory Number and Subcategory Name, Mask of "999 XXXX".
	<b>DB Column</b>	Product.SubcategoryNr + Product.Name

Control	Description			
New	Clicking the New button allows the user add a new food subcategory record.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + N		
Edit	Clicking the Edit button allows the user to edit the displayed food subcategory record.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + T		
Deactivate	A check box used to indicate that food subcategory is discontinued.			
	<b>Type</b>	Check Box		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Product.Status		
Subcategory Name	The name of the food subcategory.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	50		
	<b>Validation</b>	NA		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Product.Name		
Subcategory Number	The subcategory number used to identify the subcategory name. This number is used for display sequence purposes also.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Integer 3		
	<b>Validation</b>	Numeric, Mask 999		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Product.SubCategoryNr		

Control	Description			
Rules UOM	The food rules unit of measure for the subcategory. Examples are ounces weight for WIC cereal or ounces volume for milk or item for eggs.			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes		
	<b>DB Column</b>	Product.UOMCd		
	<b>Code ID</b>	UOM This code element is non-editable. The installed values are: Ounce Item Penny		
Minimum Issuance	Minimum Issuance is the minimum amount that must be issued if any food item from this subcategory is found in a model or participant food package.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Decimal 5.2		
	<b>Validation</b>	Numeric (1 to 999), Mask ZZ9 Must be a whole number		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Product.MinimumIssuanceNr		
Multiplier Issuance	If present, the Multiplier Issuance is used in conjunction with Minimum Issuance to ensure that any food item from this subcategory is prescribed in the correct amounts in a model or participant food package. If the Minimum Issuance is 16 and the Multiplier Issuance is 8, then the only valid issuance amounts would be 16, 24, 32, 40, 48, 56 (and on as a multiplier of 8).			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	Decimal 5.2		
	<b>Validation</b>	Numeric (1 to 99), Mask Z9, Must be a whole number		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Product.MultiplierIssuanceNr		

Control	Description	
Formula Reporting Type	A list box containing the formula types such as concentrate, powder, and ready to use.	
	<b>Type</b>	List Box
	<b>Required</b>	Yes, if the Category's Infant Formula Category checkbox is selected.
	<b>DB Column</b>	Product.FormulaTypeCd
	<b>Code ID</b>	Formula Type This code element is non-editable with these installed values: Concentrate Powdered RTF Pudding
Manufacturer (FI Only)	Hyperlink to the manufacturer's screen. If value in list box then navigate to manufacturer record. If no value in list box then navigate to first manufacturer record.	
	<b>Type</b>	Link
Manufacturer (FI Only)	A list box containing all of the active manufacturers. This is primarily used for linking formula to the manufacturer with the rebate contract.	
	<b>Type</b>	List Box
	<b>Required</b>	No
	<b>DB Column</b>	Product.Man_ID
	<b>Code ID</b>	Manufacturer table lookup
Auto Split across FIs (FI Only)	A checkbox indicating that the selected item can be displayed on more than one FI. For example, if there are two FIs and the quantity is 9 items, it will automatically split that quantity between the two FIs. An item that you may not want to split up is cheese. If 16 ounces of cheese is prescribed, you do not want to split it up into four four ounce items.	
	<b>Type</b>	Checkbox
	<b>DB Column</b>	Product.AutoSplitAcrossFIIn
Infant Food	A checkbox indicating that the product is an infant food item.	
	<b>Type</b>	Checkbox
	<b>Required</b>	No
	<b>DB Column</b>	Product.InfantFoodIn

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

Business Rules
<ol style="list-style-type: none"> <li>1. For EBT states (system parameter System.FoodBenefitDeliveryMethod set to "EBT"), do not display the fields entitled Manufacturer or Autosplit across FIs.</li> <li>2. Display an error message if subcategory name is not unique for the category.</li> <li>3. Display an error message if subcategory number is not unique for the category.</li> <li>4. Display an error message if a subcategory number of "000" is entered whose category is checked as either Infant Formula Category or WIC Eligible Medical Food.</li> <li>5. For EBT states (System.FoodBenefitDeliveryMethod set to "EBT"), display an error message when a subcategory number not = "000" is added but no "000" record exists whose category is not checked as either Infant Formula Category or WIC Eligible Medical Food. The "000" record must be exist for non-formula/medical food before any non "000" subcategory is set up.</li> <li>6. For EBT states (System.FoodBenefitDeliveryMethod set to "EBT"), if a new Subcategory has been properly defined (i.e. edit passed), but no container record has been properly defined (i.e. edit passed), do not allow the save to occur. Display an error message stating that the associated container portion of the subcategory must be defined before saving is allowed.</li> <li>7. Display error if category is a marked as Cash Value Voucher and Rules UOM is not Penny</li> <li>8. If category is marked as Cash Value Voucher, disable and clear Formula Reporting Type, Manufacturer, AutoSplit across FIs and all Food Rules Attributes fields.</li> <li>9. When New button is pressed, default the Minimum Issuance to 1.</li> </ol>

Developer Notes
<ol style="list-style-type: none"> <li>1. For EBT, default autosplit to unchecked in the database record.</li> </ol>

## 1.4 Containers

The Containers screen is used to update, add, deactivate or view WIC approved food subcategory containers. The Containers area has three screens.

The Details screen holds attributes about the container for food packaging with the descriptions displayed on “food instruments”. For the FI state, many containers may be defined with the description being printed on the FI checks. For the EBT state, only one container will be defined for a subcategory record.

The Peer Group Pricing screen contains the average price, lift factors and maximum pricing for all peer groups. For the FI state, this information is used for setting FI average prices and not to exceed (NTE) amounts. For the EBT state, this information is maintained for extrapolating to set new UPC prices. The average prices and NTE amounts are also maintained at the UPC detail product level which is what is used by the EBT host for processing purposes.

The UPC Detail Products screen defines the associated detail products. For FI states, this is primarily for price surveys (which accomplish peer group price resetting). For EBT states, this is the UPC database and as already stated contains peer group pricing. This structure also supports price surveys.

### 1.4.1 Details

The Details screen contains the primary attributes about a container.

> Food > Containers > Details

The screenshot displays the 'Containers - Details' form. At the top, there are dropdown menus for 'Category' (01 Milk) and 'Subcategory' (001 Whole Milk). Below these is a 'Container' dropdown set to 'Whole Milk' and a pagination indicator '1 of 99'. Action buttons for 'New' and 'Edit' are visible. The main form fields include: 'Container Description' (Whole Milk), 'Unit of Measure' (Quart), 'Units Per Container' (32.00000) with an 'Ounce' label and a 'Calculate Size' button, and 'Prepared Size (fluid ounces only)' (32.00000) with another 'Calculate Size' button. A dashed box contains 'Price Survey Overrides' with 'Minimum Override' and 'Maximum Override' input fields. Below this is 'Optional Food Container' (dropdown), 'Equivalent Quantity' (input), 'Direct Ship Candidate' (checkbox), and 'Allow Combine and Average' (checkbox). A final dashed box labeled 'Proration' contains 'Prorate to Zero' (checkbox), '2/3 %-age' (0.667), and '1/3 %-age' (0.333). A 'Deactivate' checkbox is located on the right side of the form.

Control	Description	
Category	This is the Category of the container. It acts as a filter for accessing subcategory records and their container records.	
	<b>Type</b>	List Box
	<b>Required</b>	Yes, Category Number and Category Name, Mask of "99 XXXX".
	<b>DB Column</b>	FoodCategory.name
	<b>Code ID</b>	FoodCategory table lookup
Subcategory	This is the subcategory of the container. It acts as a filter for accessing container.	
	<b>Type</b>	List Box
	<b>Required</b>	Yes, Subcategory Number and Subcategory Name, Mask of "999 XXXX".
	<b>DB Column</b>	Product.Name
	<b>Code ID</b>	Product table lookup
Container	This is the record selector for the container records for the selected food subcategory. It contains the description values. The drop-down and spin control allow selection of other container records for the selected food subcategory.	
	<b>Type</b>	Record Selector
	<b>DB Column</b>	ProdContainer.FIDc
	<b>Contents</b>	Container Names
New	Clicking the New button allows the user to add a new food container record.	
	<b>Type</b>	Command Button
	<b>Hot Key</b>	Alt + N
Edit	Clicking the Edit button allows the user to edit the displayed food container record.	
	<b>Type</b>	Command Button
	<b>Hot Key</b>	Alt + T
Deactivate	A check box used to indicate that a container is discontinued. This check box is also used if adding a new container prior to it being ready for general use. Once this check box is selected the container can no longer be selected for a participant's food package.	
	<b>Type</b>	Checkbox
	<b>DB Column</b>	ProdContainer.Status

Control	Description			
Container Description	For FI States, the description of what is printed on the food instrument. For EBT States, the description should be the same description as the subcategory.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Value found in the system parameter FI.DescriptionMaxLength		
	<b>Validation</b>	NA		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ProdContainer.FIDc		
Unit of Measure	This is the unit of measure (i.e. size) of the container.			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes		
	<b>DB Column</b>	ProdContainer.ContainerSizeCd		
	<b>Code ID</b>	Container Size This code element is non-editable. The installed values are: Ounce Quart Half Dozen Half Gal Gallon Liter Pound Dozen Can Bottle Jar Package Bag Penny		

Control	Description			
Units per Container	This is the unit per container from the Rules UOM perspective for the container.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Decimal 9,5		
	<b>Validation</b>	Numeric		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ProdContainer.UnitsPerContainerNr		
<no label>	This is the Rules UOM.			
	<b>Type</b>	Text Box		
	<b>Required</b>	NA		
	<b>Length</b>	NA		
	<b>Validation</b>	NA		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	Product.UOMCd		
Calculate Size	Clicking the Calculate Size command button brings up the Calculate Size pop-up window. The Calculate Size pop-up is used to convert other measurements to ounces. The results of the conversion will be placed in the Units Per Container. See Calculate Size Pop-up section in this document for more details.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	None		
Prepared Size (fluid ounces only)	The total prepared size of a product container.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	Decimal 9,5		
	<b>Validation</b>	Numeric		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ProdContainer.PreparedSizeNr		
Calculate Size	Clicking the Calculate Size command button brings up the Calculate Size pop-up. The Calculate Size pop-up is used to convert other measurements to ounces. The results of the conversion will be placed in the Prepared Size. See the Calculate Size Pop-Up section of this document for details.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	None		

Control	Description			
Price Survey Overrides- Maximum Override	During price survey data entry, prices are not allowed to be entered if they are more than the current maximum price. This field is used to override the current maximum price in order that data can be entered.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	Decimal 5,2		
	<b>Validation</b>	Numeric, Mask of \$999.99		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ProdContainer.MaxOverridePriceAmt		
Price Survey Overrides- Minimum Override	During price survey data entry, prices are not allowed to be entered if they are less than the current minimum price. This field is used to override the current minimum price in order that data can be entered.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	Decimal 5,2		
	<b>Validation</b>	Numeric, Mask of \$999.99		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ProdContainer.MinOverridePriceAmt		
Optional Food Container (FI Only)	A list box containing all food items that can be associated as an optional food. Examples of optional foods are beans or peanut butter. This optional food prints on the food instrument when the food container is selected in a food package.			
	<b>Type</b>	List Box		
	<b>Required</b>	No		
	<b>Code ID</b>	ProdContainer table lookup (OPConID field)		
Equivalent Quantity (FI Only)	A text box used to record the equivalent quantity for the optional food container. Example could be 16 ounces of beans are equal to 18 ounces of peanut butter so the numerical equivalent would be 0.88889.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes, if an Optional Food Container is selected.		
	<b>Length</b>	Decimal 9,5		
	<b>Validation</b>	Numeric		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ProdContainer.OptEquivalentRt		

Control	Description			
Direct Ship Candidate	A check box used to indicate that a container may be a direct ship item. Whether it is or not is dependent on it being marked as such during the clinic service food issuance process.			
	<b>Type</b>	Checkbox		
	<b>DB Column</b>	ProdContainer.DirectShipCandidateIn		
Allow Combine and Average	A checkbox used to indicate that the food item is allowed to be 'combined and averaged' against the maximum food rules.			
	<b>Type</b>	Checkbox		
	<b>DB Column</b>	ProdContainer.CombineAverageIn		
Proration – Prorate to Zero	A checkbox used to indicate that the food item may be prorated to 0.			
	<b>Type</b>	Checkbox		
	<b>DB Column</b>	ProdContainer.ProrateToZeroIn		
Prorate – 2/3 %-age	This indicates the amount that this food item should be prorated at for 2/3 proration situations.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Decimal 4.3		
	<b>Validation</b>	Numeric, Mask 9.999, Value must be less than or equal to 1.000.		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ProdContainer.Prorate2Pct		
Prorate – 1/3 %-age	This indicates the amount that this food item should be prorated at for 1/3 proration situations.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Decimal 4.3		
	<b>Validation</b>	Numeric, Mask 9.999, Value must be less than or equal to 1.000.		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ProdContainer.Prorate1Pct		

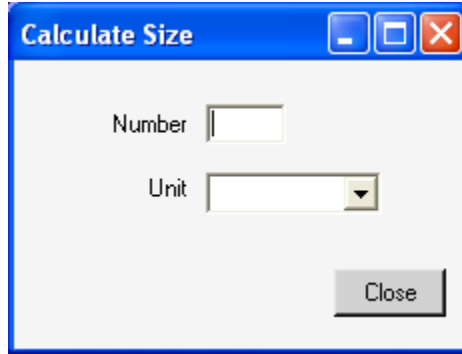
Control	Description			
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this food container record is displayed.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	NA		
	<b>Validation</b>	Mask of 'firstname lastname mm/dd/yyyy'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

Business Rules
<ol style="list-style-type: none"> <li>For EBT states (system parameter System.FoodBenefitDeliveryMethod set to "EBT"), do not display the fields entitled Optional Food Container and Equivalent Quantity.</li> <li>For EBT states (system parameter System.FoodBenefitDeliveryMethod set to "EBT"), when the New button is pressed, auto fill the Container Description with the Subcategory name.</li> <li>When a new container has been properly defined (i.e. Details edit passed), its associated peer group pricing records are created with effective date of current date, factor set to the Food.DefaultSystemFactor system parameter and the other columns (i.e. average price) set to zeroes.</li> <li>Display an error message if the selected Optional Food Container is the same as in the Container Description (selected itself is not allowed).</li> <li>Display an error message if the Container Description is a duplicate within the subcategory.</li> <li>Hide Direct Ship Candidate for states that do not direct ship food items (system parameter System.DirectShipFoodItems set to "No").</li> <li>Display error if category is marked as CVV and Units Per Container is not Penny.</li> <li>If category is marked as CVV, disable and clear Optional Food Container, Equivalent Quantity, and Direct Ship Candidate.</li> <li>For EBT states (system parameter System.FoodBenefitDeliveryMethod set to "EBT"), disable the New button if a record exists for the subcategory.</li> <li>When New button is pressed and the record's category is marked as CVV then default 2/3 %-age and 1/3 %-age to 1.000; otherwise default 2/3 %-age to 0.667 and 1/3 %-age to 0.333.</li> <li>Display error if a record whose category is marked as CVV is not set to 1.000 for the 2/3 %-age and 1/3 %-age.</li> <li>Display error if Prorate to Zero is unchecked and the 2/3 %-age or 1/3 %-age is set to 0.000.</li> </ol>

Developer Notes
<ol style="list-style-type: none"> <li>Implementation Note: For EBT states, set the FI.DescriptionMaxLength to 50.</li> </ol>

**1.4.1.1 Calculate Size Pop-up**

The Calculate Size pop-up is used to convert different units of measure to ounces.



Control	Description			
Number	The number of units to be converted.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	5		
	<b>Validation</b>	Numeric, 1-99999		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Not stored		
Unit	A list box containing units of measure. The current values that display are: Pounds, Gallons, 1/2 Gallons, Quarts, Grams, Milliliters and Liters.			
	<b>Type</b>	List Box		
	<b>Required</b>	No		
	<b>DB Column</b>	Not Stored		
	<b>Code ID</b>	NA – Values are hard coded in system		
Close	Clicking the Close button closes the Calculate Size window and returns the user to the Container screen.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + C		

Business Rules
1.

Developer Notes
1. If UnitType = Pounds

**Developer Notes**

```
result = CType(_TypedForm.numberTextBox.Text, Decimal) * 16
    Case UnitType.Gallons
        _result = CType(_TypedForm.numberTextBox.Text, Decimal) * 128
    Case UnitType.HalfGallons
        _result = CType(_TypedForm.numberTextBox.Text, Decimal) * 64
    Case UnitType.Quarts
        _result = CType(_TypedForm.numberTextBox.Text, Decimal) * 32
    Case UnitType.Grams
        _result = CType(_TypedForm.numberTextBox.Text, Decimal) * 0.03527
    Case UnitType.Milliliters
        _result = CType(_TypedForm.numberTextBox.Text, Decimal) * 0.03381
    Case UnitType.Liters
        _result = CType(_TypedForm.numberTextBox.Text, Decimal)* 33.81402
```

**1.4.2 Peer Group Pricing**

The Peer Group Pricing screen is used to set all the container prices for every peer group defined in the system. The prices are controlled by an Effective Date. This screen is designed to be used in two manners. First, it is to see the most recent (current) peer group prices for a container. Second, it is to see a set of prices from a container's peer group perspective. Two methods of pricing are available: Percentage and Standard Deviation. The method is chosen by using the Vendor.PricingStateType configuration parameter. For FI states, either method is available.

For EBT states (System.FoodBenefitDeliveryMethod set to "EBT"), Standard Deviation is the Vendor.PricingStateType method.

**Percentage View:**

> Food > Containers > Peer Group Pricing

Category

Subcategory

Container

Price Resend

View Selection  Most Recent  Peer Group History Peer Group

Peer Group Pricing					
Effective Date	PG #	Price	Factor	Max. Price	
01/01/2006	1	4.2816	1.05	4.50	
01/01/2006	2	4.2816	1.05	4.50	
01/01/2006	3	4.2816	1.05	4.50	
01/01/2006	4	4.2816	1.05	4.50	
01/01/2006	5	4.2816	1.05	4.50	
01/01/2006	6	4.2816	1.05	4.50	
01/01/2006	7	4.2816	1.05	4.50	
01/01/2006	8	4.2816	1.05	4.50	
01/01/2006	9	4.2816	1.05	4.50	

1

**Standard Deviation View:**

> Food > Containers > Peer Group Pricing

Category    
 Subcategory    
 Container    
 Price Resend

View Selection  Most Recent  Peer Group History Peer Group

Peer Group Pricing						
Effective Date	PG #	Price	Std Dev	Factor	Max. Price	
01/01/2006	1	4.2816	0.00	1	4.28	
01/01/2006	2	4.2816	0.00	1	4.28	
01/01/2006	3	4.2816	0.00	1	4.28	
01/01/2006	4	4.2816	0.00	1	4.28	
01/01/2006	5	4.2816	0.00	1	4.28	
01/01/2006	6	4.2816	0.00	1	4.28	
01/01/2006	7	4.2816	0.00	1	4.28	
01/01/2006	8	4.2816	0.00	1	4.28	
01/01/2006	9	4.2816	0.00	1	4.28	
01/01/2006	Statewide Peer Group	4.2816	0.00	1	4.28	

Control	Description	
Category	This is the record selector for category. It acts as a filter for accessing subcategory records and their container records.	
	Type	Record Selector
	Contents	Category Number and category Name, Mask of "99 XXXX".
	DB Column	Not Stored
Subcategory	This is the record selector for subcategory. It acts as a filter for accessing container records.	
	Type	Record Selector
	Contents	Subcategory Number and Subcategory Name, Mask of "999 XXXX".
	DB Column	Not Stored

Control	Description	
Container	This is the record selector for the container records for the selected food subcategory. It contains the description values. The drop-down and spin control allow selection of other container records for the selected food subcategory.	
	<b>Type</b>	Record Selector
	<b>DB Column</b>	ProdContainer.FIDc
	<b>Contents</b>	Container Names
Price Resend	The user checks this checkbox to indicate that the next banking issuance file cycle will have its peer group pricing recalculated and sent to the bank for any unredeemed and unexpired FI with this container. The price that will be used will be based on the current date. It is therefore important for the user to ensure that those peer groups' new pricing records use the current date. The bank cycle will uncheck (reset) the indicator.	
	<b>Type</b>	Checkbox
	<b>DB Column</b>	ProdContainer.PriceResendIn
View Selection	When "Most Recent" value is selected, the Peer Group Pricing data grid shows each peer group's most recent effective date entry with the corresponding data. When "Peer Group History" value is selected, the Peer Group Pricing data grid shows, based on the selected peer group, all the effective date entries with the corresponding data.	
	<b>Type</b>	Radio Button
	<b>Required</b>	Yes
	<b>DB Column</b>	Not stored
Peer Group	List of available peer groups. This is used as a filter for the View Selection – Peer Group History radio button selection.	
	<b>Type</b>	List Box, Mask of Z9
	<b>Required</b>	Yes – if Peer Group History button is selected
	<b>DB Column</b>	Not stored
	<b>Code ID</b>	PeerGroup table lookup
Add Row	Clicking the Add Row command button causes a new row to be added to the Peer Group Pricing Grid.	
	<b>Type</b>	Command Button
	<b>Hot Key</b>	Alt + A

Control	Description			
Remove Row	Clicking the Remove Row command button causes a row to be removed from the Peer Group Pricing Grid.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + R		
Add Rows for All Peer Groups	Clicking the Add Rows for All Peer Groups command button causes a new grid to be created that contains a row for each available peer group to be added from the Peer Group Pricing Grid.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + O		
Peer Group Pricing	This grid shows effective date peer group pricing entries. The contents depend on the selected View Selection radio button value.			
	<b>Type</b>	Editable Data Grid		
Effective Date	Effective date when the prices take effect for a given peer group.			
	<b>Type</b>	Date Picker		
	<b>Required</b>	Yes		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ContainerPeerGroup.EffectiveDt		
PG #	List of available peer groups.			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes, Mask of Z9		
	<b>DB Column</b>	ContainerPeerGroup.PG_ID		
	<b>Code ID</b>	PeerGroup table lookup		
Price	The peer group price for the container.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Decimal 9,5		
	<b>Validation</b>	Numeric, Mask of ZZZ9.99999		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ContainerPeerGroup.PriceAmt		

Control	Description			
Std Dev (Std Dev factor only)	The peer group standard deviation for the container.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Decimal 5,3		
	<b>Validation</b>	Numeric, Mask of Z9.999		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ContainerPeerGroup.StandardDeviation		
Factor	The peer group factor for the container.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Decimal 5,3		
	<b>Validation</b>	Numeric, Mask of Z9.999		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ContainerPeerGroup.Factor		
Max. Price	The peer group maximum price for the container. For percentage pricing method, Max Price is calculated by taking the Price multiplied by the Factor. For standard deviation pricing method, Max Price is calculated by taking the Std Dev multiplied by the Factor and then added to the Price.			
	<b>Type</b>	Text Box		
	<b>Required</b>	NA		
	<b>Length</b>	NA		
	<b>Validation</b>	Mask of ZZZ9.99999		
	<b>Display Only</b>	Yes	<b>Calculated</b>	Yes
	<b>DB Column</b>	Not stored		

Business Rules
<ol style="list-style-type: none"> <li>1. Peer Group is disabled until the user selects the View Selection – Peer Group History radio button.</li> <li>2. Add Row and Remove Row is disabled until the user selects the View Selection – Peer Group History radio button.</li> <li>3. At least one row is required for each peer group. A user may not remove a peer group row if the row is the last row for that peer group.</li> <li>4. There must be a peer group row that contains an effective date whose value is a current date or a date in the past.</li> <li>5. When adding a row to the grid, the effective date defaults to the current date.</li> </ol>

**Business Rules**

6. When adding a row to the grid, the price defaults to the zero.
7. When adding a row to the grid, the factor defaults to the Food.DefaultSystemFactor system parameter.
8. A state must decide whether its maximum pricing is based on either percentage factoring or standard deviation factoring (identified by the Config Parm "Vendor.PriceSurveyStateType").
  - a. For Percentage factoring: Max Price is calculated by taking the Price and multiplying it by the Factor
  - b. For Std Dev factoring: Max Price is calculated by multiplying the Standard Deviation by the Factor and then adding it to the Price.
9. The WIC 50% peer group is determined based on the Configuration Parameter "Vendor.WIC50%PeerGroupNbr". For vendors with this peer group number, the contents of the Configuration Parameter "Vendor.WIC50%Name" is displayed.
10. For Percentage factoring, display error if the factor for the WIC 50% peer group row is not set to 1 (50% are not allowed to have any lift).
11. For Std Dev factoring, display error if the factor for the WIC 50% peer group row is not set to 0 (50% are not allowed to have any lift).
12. For EBT states (system parameter System.FoodBenefitDeliveryMethod set to "EBT"), do not display the fields entitled Container.
13. Sort the grid by PG# and Effective Date.
14. Display error if category is a marked as CVV and Average Price is not equal to the Container/Subcategory's Prepared Size.
15. If category is marked as CVV, disable Price Resend.
16. If Vendor.PricingStateType = 'SD' and category is marked as CVV, display error if the Factor is not set to 0. This ensures that the calculated Max Price will be the same as the Price.
17. If Vendor.PricingStateType = 'PCT' and category is marked as CVV, display error if the Factor is not set to 1. This ensures that the calculated Max Price will be the same as the Price.
18. Remove Row is enabled on "New" rows. Previously saved records can not be removed because of their use in pricing FIs and/or survey results.

**Developer Notes**

1. The number of Peer Groups is automatically set to the peer groups in the Peer Group table.
2. For EBT states, there is only one container record for a subcategory, therefore the field is hidden but the record is still used.

## 1.5 UPC/PLU Detail Products

The UPC/PLU Detail Products screens allow the definition of the lowest level of the product hierarchy; therefore each UPC/PLU detail product is directly related to a hierarchy above it.

In the FI world, setting up UPC/PLU detail products is needed for price surveys.

In the EBT world, setting up UPC detail products is core functionality of the food setup because it is at the UPC level that food is redeemed and pricing is validated. It also is needed for price surveys.

### 1.5.1 Details

The Details screen contains the primary attributes about a UPC Detail Product.

> Food > UPC/PLU Detail Products > Details

Category

Subcategory

Container

**UPC / PLU Detail Product**

View:  By Description  By UPC / PLU

Include:  Include Active Only  Include All  Include Inactive Only

Description

UPC / PLU Information:

- UPC / PLU Number
- Unit Of Measure
- Package Size
- Benefit Quantity
- Benefit Description

Manufacturer

Effective Date

End Date

Exclude from All Authorized

Generic

Units  Quarts

Control	Description
Category	This is the category of the UPC detail record. It acts as a filter for accessing subcategory, container records and their UPC detail records.
<b>Type</b>	List Box
<b>Required</b>	Yes, Category Number and Category Name, Mask of "99 XXXX".
<b>DB Column</b>	FoodCategory.Name
<b>Code ID</b>	Category table lookup

Control	Description	
Subcategory	This is the subcategory of the UPC detail record. It acts as a filter for accessing container records and their UPC detail records.	
	<b>Type</b>	List Box
	<b>Required</b>	Yes, Subcategory Number and Subcategory Name, Mask of "999 XXXX".
	<b>DB Column</b>	Product.Name
	<b>Code ID</b>	Subcategory table lookup
Container (FI Only)	This is the container of the UPC detail product. It acts as a filter for accessing UPC detail product records and, when in edit mode, as a list box for associating a new UPC detail product record to its container/subcategory	
	<b>Type</b>	List Box
	<b>Required</b>	Yes
	<b>DB Column</b>	ProdContainer.FIDc
	<b>Code ID</b>	Container table lookup
UPC/PLU Detail Product	This is the record selector for the UPC/PLU Detail Product record. It contains the UPC/PLU and description values. The drop-down and spin control allow selection of other UPC/PLU Detail Product records.	
	<b>Type</b>	Record Selector
	<b>DB Column</b>	DetailProduct.Description and DetailProductUPC
	<b>Contents</b>	Depends on "View By" radio button
New	Clicking the New button allows the user to add a new UPC Detail Product record.	
	<b>Type</b>	Command Button
	<b>Hot Key</b>	Alt + N
Edit	Clicking the Edit button allows the user to edit the displayed UPC Detail Product record.	
	<b>Type</b>	Command Button
	<b>Hot Key</b>	Alt + T

Control	Description			
View	When "View by Description" value is selected, the UPC/PLU Detail Product contains the Description followed by the UPC/PLU and is sorted by Description. When "View by UPC/PLU" value is selected, the UPC/PLU Detail Product contains the UPC/PLU followed by the Description and is sorted by UPC/PLU.			
	<b>Type</b>	Radio Button		
	<b>Required</b>	Yes		
	<b>DB Column</b>	Not stored		
Include	When "Include Active Only" value is selected, the UPC/PLU Detail Product contains only active UPC/PLUs (end date is blank or greater than or equal to current date). When "Include All" value is selected, the UPC/PLU Detail Product contains all UPC/PLUs. When "Include Inactive Only" value is selected, the UPC Detail Product contains only inactive UPC/PLUs (end date is less than current date).			
	<b>Type</b>	Radio Button		
	<b>Required</b>	Yes		
	<b>DB Column</b>	Not stored		
Description	The specific description of the UPC/PLU detail product.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	50		
	<b>Validation</b>	NA		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProduct.Description		
UPC/PLU Information – UPC/PLU Number	The UPC/PLU number for the detail product.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	17		
	<b>Validation</b>	Numeric		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProduct.UPC		

Control	Description			
UPC/PLU Information – Unit Of Measure	This is the detail product Unit of Measure			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes, if UPC Number exists		
	<b>DB Column</b>	DetailProduct.UnitOfMeasureCd		
	<b>Code ID</b>	Container Size This code element is editable but these installed values are non-editable: Ounce Quart Half Dozen Half Gal Gallon Liter Pound Half Dozen Dozen Can Bottle Jar Package Bag Penny		
UPC/PLU Information – Package Size	The package size of the UPC/PLU.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes, if UPC Number exists		
	<b>Length</b>	Decimal 5,2		
	<b>Validation</b>	Numeric		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProduct.PackageSize		

Control	Description			
UPC/PLU Information – Benefit Quantity	The benefit quantity of the UPC/PLU.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes, if UPC Number exists		
	<b>Length</b>	Decimal 5,2		
	<b>Validation</b>	Numeric		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProduct.BenefitQty		
UPC/PLU Information – Benefit Description	The benefit unit description of the UPC/PLU.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes, if UPC Number exists		
	<b>Length</b>	50		
	<b>Validation</b>	None		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProduct.BenefitDescription		
Manufacturer (EBT Only)	Hyperlink to the manufacturer's screen. If value in list box then navigate to manufacturer record. If no value in list box then navigate to first manufacturer record.			
	<b>Type</b>	Link		
Manufacturer (EBT Only)	A list box containing all of the active manufacturers. This is exclusively used for linking formula to the manufacturer with the rebate contract. Once populated, every UPC under the subcategory will share the same value.			
	<b>Type</b>	List Box		
	<b>Required</b>	No		
	<b>DB Column</b>	Product.Man_ID		
	<b>Code ID</b>	Manufacturer table lookup		
Effective Date	The effective date of the UPC/PLU.			
	<b>Type</b>	Date Picker		
	<b>Required</b>	Yes		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProduct.EffectiveDt		

Control	Description			
End Date	The end date of the UPC/PLU.			
	<b>Type</b>	Date Picker		
	<b>Required</b>	No		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProduct.EndDt		
Exclude from All Authorized	A check box used to indicate that a UPC/PLU Detail Product can not be redeemed against the All Authorized (000) subcategory in EBT based states.			
	<b>Type</b>	Check Box		
	<b>DB Column</b>	DetailProduct.ExcludeIn		
Generic	A check box used to indicate that a UPC/PLU Detail Product is a generic product.			
	<b>Type</b>	Check Box		
	<b>DB Column</b>	DetailProduct.GenericIn		
Units	The specific units of the detail product in relation to the displayed unit of measure.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Decimal 5,2		
	<b>Validation</b>	Numeric, Mask of ZZ9.9Z		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProduct.Quantity		
Units: Unit of Measure (unlabeled)	This field is populated with the Unit of Measure that the detail product belongs to.			
	<b>Type</b>	Text Box		
	<b>Required</b>	NA		
	<b>Length</b>	NA		
	<b>Validation</b>	NA		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	NA		

Control	Description			
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this UPC/PLU detail product record is displayed.			
	<b>Type</b>	Text Box		
	<b>Required</b>	NA		
	<b>Length</b>	NA		
	<b>Validation</b>	Mask of 'firstname lastname mm/dd/yyyy'		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProduct.ModifyStfplID + DetailProduct.ModifyDt		

<b>Business Rules</b>
<ol style="list-style-type: none"> <li>1. For FI states (system parameter System.FoodBenefitDeliveryMethod set to "FI"), do not display the field entitled Manufacturer.</li> <li>2. For EBT states (system parameter System.FoodBenefitDeliveryMethod set to "EBT"), do not display field entitled Container.</li> <li>3. View By radio button defaults to View By Description.</li> <li>4. Include radio button defaults to Include Active Only.</li> <li>5. Include Active Only populates record selector with UPC records where the end date is blank or greater than or equal to current date.</li> <li>6. Include Inactive Only populates record selector with UPC records where the end date is less than current date.</li> <li>7. For EBT states (system parameter System.FoodBenefitDeliveryMethod set to "EBT"), if the subcategory number is '000', disable the New and Edit buttons.</li> <li>8. For EBT states (System.FoodBenefitDeliveryMethod set to "EBT"), UPC Number is a required field.</li> <li>9. Display an error message if the end date is not later than the effective date.</li> <li>10. Display an error message if the UPC Number where its effective time period (effective and end date) overlaps with a existing record of the same UPC Number.</li> <li>11. For EBT states (system parameter System.FoodBenefitDeliveryMethod set to "EBT"), if a new UPC Detail Product has been properly defined (i.e. Details edit passed), but no peer group pricing has been setup, the save is allowed with its associated peer group pricing records created with effective date of current date, factor set to the Food.DefaultSystemFactor system parameter and the other columns (i.e. average price) set to zeroes.</li> <li>12. For EBT states (system parameter System.FoodBenefitDeliveryMethod set to "EBT"), upon saving of UPC detail product data, create a file for the EBT Host system of new or changed UPC records. The file will be written to a location as defined in the system parameter System.EBTHostUPCFileLocation. See the Finance Interface with EBT Host DFDD for more details.</li> </ol>

Business Rules
13. Display an error if the calculated check digit is different than the last digit in the UPC/PLU Number. The error message must contain the calculated check digit. The check digit algorithm is the same regardless of the length of the UPC/PLU Number and is found in the System Overview Appendix.
14. Disable the New and Edit buttons, if the Container is deactivated.

Developer Notes
1. For EBT states, there is only one container record for a subcategory, therefore the field is hidden but the record is still used.

### 1.5.2 Peer Group Pricing

The Peer Group Pricing screen is used to display all the UPC prices for every peer group defined in the system.

This screen is only available for EBT states (System.FoodBenefitDeliveryMethod set to "EBT").

> Food > UPC/PLU Detail Products > Peer Group Pricing

Category 01 Milk

Subcategory 005 Lactose Free or Reduced

View  
 By Description  By UPC Number

Include  
 Include Active Only  Include All  Include Inactive Only

UPC Detail Product: Wyoming Dairies One Gallon 23475896 09/20/2003

Unit of Measure: Quarts

View Selection  Most Recent  Peer Group History

Peer Group ▼

Peer Group Pricing							
Effective Date	PG #	Subcat Set	Price	Std Dev	Factor	Max. Price	
01/01/2006	1	<input type="checkbox"/>	4.2816	0.00	1	4.28	
01/01/2006	2	<input type="checkbox"/>	4.2816	0.00	1	4.28	
01/01/2006	3	<input type="checkbox"/>	4.2816	0.00	1	4.28	
01/01/2006	4	<input type="checkbox"/>	4.2816	0.00	1	4.28	
01/01/2006	5	<input type="checkbox"/>	4.2816	0.00	1	4.28	
01/01/2006	6	<input type="checkbox"/>	4.2816	0.00	1	4.28	
01/01/2006	7	<input type="checkbox"/>	4.2816	0.00	1	4.28	
01/01/2006	8	<input checked="" type="checkbox"/>	4.2816	0.00	1	4.28	
01/01/2006	9	<input type="checkbox"/>	4.2816	0.00	1	4.28	
01/01/2006	Outside Peer Group		4.2816		1	4.28	

Control	Description	
Category	This is the record selector for category. It acts as a filter for accessing subcategory records and their container records.	
	<b>Type</b>	Record Selector
	<b>Contents</b>	Category Number and category Name, Mask of "99 XXXX".
	<b>DB Column</b>	Not Stored
Subcategory	This is the record selector for subcategory. It acts as a filter for accessing container records and their UPC detail product records.	
	<b>Type</b>	Record Selector
	<b>Contents</b>	Subcategory Number and Subcategory Name, Mask of "999 XXXX".
	<b>DB Column</b>	Not Stored
UPC/PLU Detail Product	This is the record selector for the UPC/PLU Detail Product record. It contains the UPC/PLU and description values. The drop-down and spin control allow selection of other UPC/PLU Detail Product records.	
	<b>Type</b>	Record Selector
	<b>DB Column</b>	DetailProduct.Description and DetailProduct.UPC and DetailProduct.EffectiveDt
	<b>Contents</b>	Depends on "View By" radio button
View	When "View by Description" value is selected, the UPC/PLU Detail Product contains the Description followed by the UPC/PLU followed by Effective Date and is sorted by Description. When "View by UPC/PLU" value is selected, the UPC/PLU Detail Product contains the UPC/PLU followed by the Description followed by Effective Date and is sorted by UPC/PLU.	
	<b>Type</b>	Radio Button
	<b>Required</b>	Yes
	<b>DB Column</b>	Not stored

Control	Description			
Unit of Measure	This field is populated with the Unit of Measure that the detail product belongs to. It is the unit of measurement that the Quantity should be based on.			
	<b>Type</b>	Text Box		
	<b>Required</b>	NA		
	<b>Length</b>	NA		
	<b>Validation</b>	NA		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	NA		
Include	<p>When "Include Active Only" value is selected, the UPC Detail Product contains only active UPCs (end date is blank or greater than or equal to current date).</p> <p>When "Include All" value is selected, the UPC Detail Product contains all UPCs including deactivated ones.</p> <p>When "Include Inactive Only" value is selected, the UPC Detail Product contains only inactive UPCs (end date is less than current date).</p>			
	<b>Type</b>	Radio Button		
	<b>Required</b>	Yes		
	<b>DB Column</b>	Not stored		
View Selection	<p>When "Most Recent" value is selected, the Peer Group Pricing data grid shows each peer group's most recent effective date entry with the corresponding data.</p> <p>When "Peer Group History" value is selected, the Peer Group Pricing data grid shows, based on the selected peer group, all the effective date entries with the corresponding data.</p>			
	<b>Type</b>	Radio Button		
	<b>Required</b>	Yes		
	<b>DB Column</b>	Not stored		
Peer Group	List of available peer groups. This is used as a filter for the View Selection – Peer Group History radio button selection.			
	<b>Type</b>	List Box		
	<b>Required</b>	No, Mask of Z9		
	<b>DB Column</b>	Not stored		
<b>Code ID</b>	PeerGroup table lookup			

Control	Description			
Peer Group Pricing	This grid shows effective date peer group pricing entries. The contents depend on the selected View Selection radio button value.			
	<b>Type</b>	Display Data Grid		
Effective Date	Effective date when the prices take effect for a given peer group.			
	<b>Type</b>	Text Box		
	<b>Required</b>	NA		
	<b>Length</b>	NA		
	<b>Validation</b>	Format 'mm/dd/yyyy'		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProductPeerGroup.EffectiveDt		
PG #	Peer group number.			
	<b>Type</b>	Text Box		
	<b>Required</b>	NA		
	<b>Length</b>	NA		
	<b>Validation</b>	NA, Mask of Z9		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProductPeerGroup.PG_ID (Peer Group Name)		
Subcat Set	A check box used to indicate that the peer group pricing for this UPC Detail Product was set to the UPC's subcategory level peer group pricing values due to lack of sample sizes during the automated price resetting process.			
	<b>Type</b>	Check Box		
	<b>Required</b>	NA		
	<b>Display Only</b>	Yes		
	<b>DB Column</b>	DetailProductPeerGroup.SubCatLevelIn		
Price	The peer group price for the container.			
	<b>Type</b>	Text Box		
	<b>Required</b>	NA		
	<b>Length</b>	NA		
	<b>Validation</b>	Mask of ZZZ9.99999		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProductPeerGroup.PriceAmt		

Control	Description			
Std Dev (Std Dev factor only)	The peer group standard deviation for the container.			
	<b>Type</b>	Text Box		
	<b>Required</b>	NA		
	<b>Length</b>	NA		
	<b>Validation</b>	Mask ZZZ9.999		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProductPeerGroup.StandardDeviation		
Factor	The peer group factor for the container.			
	<b>Type</b>	Text Box		
	<b>Required</b>	NA		
	<b>Length</b>	NA		
	<b>Validation</b>	Mask Z9.999		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	DetailProductPeerGroup.Factor		
Max. Price	The peer group maximum price for the UPC. For standard deviation pricing method, Max Price is calculated by taking the Std Dev multiplied by the Factor and then added to the Price.			
	<b>Type</b>	Text Box		
	<b>Required</b>	NA		
	<b>Length</b>	NA		
	<b>Validation</b>	Mask ZZZ9.99999		
	<b>Display Only</b>	Yes	<b>Calculated</b>	Yes
	<b>DB Column</b>	Not stored		

<b>Business Rules</b>
<ol style="list-style-type: none"> <li>1. View By radio button defaults to View By Description.</li> <li>2. Include radio button defaults to Include Active Only.</li> <li>3. Include Active Only populates record selector with UPC records where the end date is blank or greater than or equal to current date.</li> <li>4. Include Inactive Only populates record selector with UPC records where the end date is less than current date.</li> <li>5. View Selection radio button defaults to Most Recent.</li> <li>6. Peer Group is disabled until the user selects the View Selection – Peer Group radio button.</li> <li>7. Max Price is calculated by multiplying the Standard Deviation by the Factor and then adding it to the Price.</li> </ol>

**Business Rules**

8. The WIC 50% peer group is determined based on the Configuration Parameter "Vendor.WIC50%PeerGroupNbr". For vendors with this peer group number, the contents of the Configuration Parameter "Vendor.WIC50%Name" is displayed.
9. For EBT states (system parameter System.FoodBenefitDeliveryMethod set to "EBT"), do not display the fields entitled Container.
10. Sort the grid by PG# and Effective Date.

**Developer Notes**

1. For EBT states, there is only one container record for a subcategory, therefore the field can be hidden but the record is still used.

## 1.6 National UPC Database Files

The National UPC Database Files screen allows for a user to process a USDA provided National UPC Download File or to extract a State UPC Upload File to provide to USDA. The files are based on the format of the X9.93-2007 specification.

The load process will create new UPC Detail Records (and if applicable Subcategory/Container Records) from the National UPC Download file, provided all edits are passed. A National UPC Download Report (UI Output) will be created that details the processing results.

The extract process will create a State UPC Upload file.

The following are the steps to complete a download of a USDA UPC Download file from the USDA National database:

1. Using the USDA web application, the MPSC user requests a National UPC Download File. The USDA web application controls the criteria that may be used to select records. The USDA web application creates the USDA UPC Download file and the user downloads the file to a subdirectory location.
2. The MPSC WIC user will process the file from the subdirectory to which the file was downloaded in step 1 using the National UPC Database Files screen.

The following are the steps to complete an upload of a MPSC UPC file to the USDA National database:

1. The MPSC user requests this extract process to be executed as either a full extract or a partial extract based on records created since a certain date. The process creates a date and time stamped State UPC Upload file in a subdirectory location chosen by the user.
2. The MPSC user logs on to the USDA web application and proceeds to the Upload page. The user executes Upload process, which allows the user to point to the State UPC Upload file for uploading.
3. The USDA web application uploads the State UPC Upload file, validates the data and sends an email to the user listing validation errors and results of the upload.
4. If the MPSC user can correct errors and another upload is needed, the above steps are repeated.

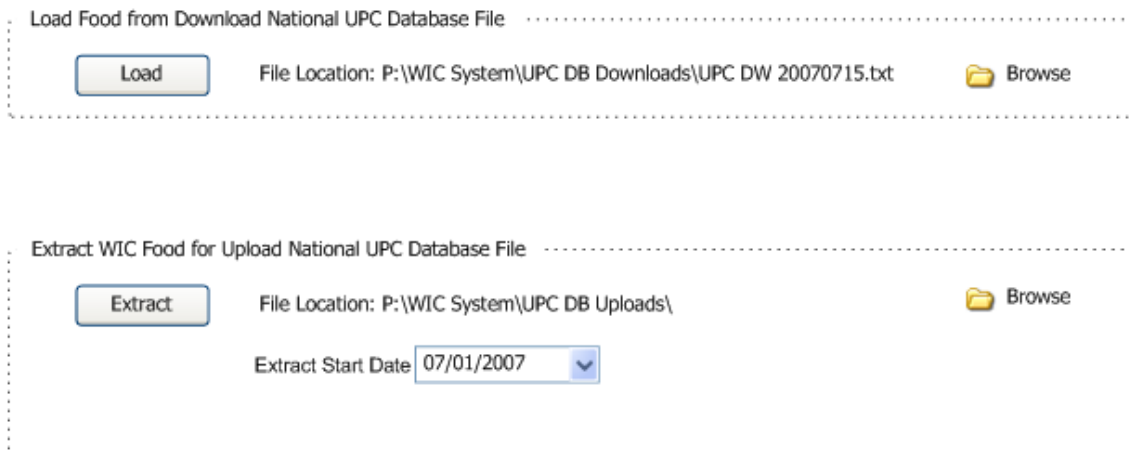
When a download file is processed, it is also important to note some post-load follow up activity will be necessary. For UPCs with pre-existing subcategories, pricing information is set up based on the UPC's subcategory pricing. For UPCs without pre-existing subcategories that have their subcategory automatically inserted (Formula and WIC Eligible Medical Food only), pricing, food rules, reporting type, form, manufacturer and rebates are not setup; therefore the subcategory is not activated. These related items should be setup and then the subcategory can be activated.

The subcategory for UPCs that are not of the Formula or WEMF category is required before downloading. The reasons for this include:



- The Subcategories within a category must use the same Unit Of Measure for All Authorized (000)
- States should decide Unit of Measure (not be forced by the first downloaded national UPC record)
- The number of these subcategories is low and all are usually setup at implementation time by the state.
- For Can/Jar/Bottle/Bag/Package Unit of Measure, state should decide the size of can in the Prepared Size (especially when concentrate)


**Note:** Permanent storage of the download and upload files in the user's subdirectory will be at the discretion of the active directory access setup at each state. The state will need to work out the security to allow the user to access a subdirectory location from the USDA web application.

> *National UPC DB Files*



Control		Description
Load	Clicking the Load button allows the user to load food from the National UPC Database Download File.	
	Type	Command Button
	Hot Key	Alt + L

Control	Description			
Load Food from Download National UPC Database File - File Location	This is the location of the National UPC Download File that will be processed when the user presses the Load button.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes, if the Load button is pressed.		
	<b>Length</b>	NA		
	<b>Validation</b>	NA		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	Not stored		
Load Food from Download National UPC Database File –  Browse	Clicking the File dialog button allows the user to choose a file from their Windows directory.			
	<b>Type</b>	File Dialog Button		
Extract	Clicking the Extract button allows the user to extract food to the State UPC Upload File.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + X		
Extract Food for Upload National UPC Database File - File Location	This is the location where the State UPC Upload File will be placed when the user presses the Extract button.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes, if the Extract button is pressed.		
	<b>Length</b>	NA		
	<b>Validation</b>	NA		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	Not stored		
Load Food from Download National UPC Database File – 	Clicking the File dialog button allows the user to choose a file from their Windows directory.			
	<b>Type</b>	File Dialog Button		

Control	Description				
Extract Food for Upload National UPC Database File –  Browse	Clicking the File dialog button allows the user to choose a file from their Windows directory.				
	<b>Type</b>	File Dialog Button			
Extract Start Date	The extract will pull any UPC records that have been inserted from this date forward. No date implies pulling all the records.				
	<b>Type</b>	Date Picker			
	<b>Required</b>	No			
	<b>Display Only</b>	No	<table border="1"> <tr> <td data-bbox="990 644 1208 680"><b>Calculated</b></td> <td data-bbox="1208 644 1419 680">No</td> </tr> </table>	<b>Calculated</b>	No
<b>Calculated</b>	No				
	<b>DB Column</b>	Not Stored			

Business Rules
<p><b>LOAD PROCESS</b></p> <ol style="list-style-type: none"> <li>1. Disable the Load button until a file has been selected.</li> <li>2. The following errors will cause the load process not to attempt to load any records from the selected file.                         <ol style="list-style-type: none"> <li>a. Display an error if the file extension is not .txt or .dta. USDA does not require any file naming standard; this error is meant to eliminate the user trying to load an abnormal (i.e. jpg) file.</li> <li>b. Display an error if the first record's first twelve characters are not 'D40000011344' (Record Identification Code, Record Sequence Number and Message Type fields).</li> </ol> </li> <li>3. If the file passes business rule 2, a popup message will ask whether the user wants to proceed with the load processing of x records (x being the record count). The user can choose to proceed or cancel processing.</li> <li>4. The following errors will cause a detail record not to be loaded and the error will be listed in the National UPC Download File Report.                         <ol style="list-style-type: none"> <li>a. The UPC/PLU is not numeric.</li> <li>b. The UPC Description is blank.</li> <li>c. The Category Code is not numeric.</li> <li>d. The Sub-category Code is not numeric.</li> <li>e. The Sub-category Description is blank.</li> <li>f. The Package Size is not numeric.</li> <li>g. The Benefit Quantity is not numeric.</li> <li>h. The Unit Of Measure is not Ounce, Quart, Half Gal, Gallon, Liter, Pound, Dozen, Can, Bottle, Jar, Package or Penny.</li> <li>i. The Purchase Indicator is not a value listed in the record layout below.</li> <li>j. The Date, Effective has a value and is not a valid date.</li> <li>k. The Date, End has a value and is not a valid date.</li> <li>l. The Category Code is not defined in the system.</li> </ol> </li> </ol>

**Business Rules**

- m. If the system parameter System.FoodBenefitDeliveryMethod = 'FI' and the Category is not either Formula or WIC Eligible Medical Food and Subcategory code is defined in the system and the unit of measure is not defined in the Container record in the system.
- n. If the system parameter System.FoodBenefitDeliveryMethod = 'EBT' and the Category is not either Formula or WIC Eligible Medical Food and the Subcategory code is not defined in the system.
- o. If the Category is either Formula or WIC Eligible Medical Food and the Subcategory code is not defined in the system but:
  - i. The Benefit Unit is not Ounce.
  - ii. The Unit Of Measure is not either Ounce, Package, Can, Bottle or Jar
- p. If the Subcategory is defined in the MPSC system:
  - i. The Subcategory – Rules UOM and the Interface's Unit of Measure are not in the same translation list. Here are the translation lists:
    - 1. Ounce, Quart, Half Gal, Gallon, Liter
    - 2. Ounce, Pound
    - 3. Item, Half Dozen, Dozen
    - 4. Penny

Note: This should not be a problem as most should use a unit of Ounces except for Eggs which should use Dozen.
- 5. If a detail record passes the above errors, the system will create the food hierarchy based on the following rules:
  - a. If the Subcategory/Container Record does not exist (Formula or WIC Eligible Medical Food), create the food hierarchy records:

Note: Following fields are on the subcategory portion of the Subcategory record.

- i. Subcategory record will be associated under the Category record in the food hierarchy.
- ii. Deactivate is unchecked (subcategory will be active)
- iii. Subcategory Number is set to Sub-category code
- iv. Subcategory Name is set to Sub-category Description
- v. Rules UOM is set to Ounces (Benefit Unit)
- vi. Formula Reporting Type is set to blank
- vii. Manufacturer is set to null
- viii. All other fields are set to blank or unchecked

Note: Following fields are on the container portion of the Subcategory record.

- ix. Deactivate is checked
- x. Description is set to Sub-category Description
- xi. Units Per Container is set to 1
- xii. Prepared Size is set to Benefit Quantity
- xiii. Unit of Measure is set to Unit of Measure (English code translation)
- xiv. All other fields are set to blank or unchecked

**Business Rules**

Note: Following fields are on the associate peer group pricing records.

- xv. Peer Group Pricing Record for each Peer Group (Records will be associated to the Subcategory Record):
  - 1. Effective Date is set to Date, Effective. If Date, Effective is blank then Effective Date will be set to current date.
  - 2. Price will be set to zero.
  - 3. Std Dev, if applicable, will be set to zero.
  - 4. Factor is set to the value in the system parameter, Food.DefaultSystemFactor.

Note: Following fields are on the UPC Detail Product record.

- xvi. UPC Detail Product record will be associated to the newly created Subcategory/Container record in the food hierarchy.
- xvii. UPC Number is set to UPC/PLU
- xviii. Description is set to Item Description
- xix. UPC Unit Of Measure is set to Unit Of Measure (English code translation)
- xx. Package Size is set to Package Size
- xxi. Benefit Quantity is set to Benefit Quantity
- xxii. Benefit Description is set to Benefit Unit
- xxiii. Effective Date is set to Date, Effective. If Date, Effective is blank then Effective Date will be set to current date.
- xxiv. End Date is set to Date, End
- xxv. Exclude from All Authorized is set by Purchase Indicator
- xxvi. Units is set to 1
- xxvii. If the system parameter System.FoodBenefitDeliveryMethod = 'EBT', setup Peer Group Pricing Record for each Peer Group (Records will be associated to the UPC Detail Product Record):
  - 1. Effective Date is set to Date, Effective. If Date, Effective is blank then Effective Date will be set to current date.
  - 2. The Subcat Set checkbox is checked
  - 3. Price will be set to zero.
  - 4. Std Dev, if applicable, will be set to zero.
  - 5. Factor is set to the value in the system parameter, Food.DefaultSystemFactor.

- b. If the Subcategory/Container Record does exist, create the UPC Detail Product record:

Note: Following fields are on the UPC Detail Product record.

- i. UPC Detail Product Record will be associated under the Subcategory/Container record in the food hierarchy.
- ii. UPC Number is set to UPC/PLU

**Business Rules**

- iii. Description is set to Item Description
- iv. UPC Unit Of Measure is set to Unit Of Measure (English code translation)
- v. Package Size is set to Package Size
- vi. Benefit Quantity is set to Benefit Quantity
- vii. Benefit Description is set to Benefit Unit
- viii. Effective Date is set to Date, Effective. If Date, Effective is blank then Effective Date will be set to current date.
- ix. End Date is set to Date, End
- x. Exclude from All Authorized is set by Purchase Indicator
- xi. Calculate Units by:
  - 1. If Subcategory Unit of Measure and UPC Unit of Measure are in translation list (see business rule 4.p), then translate accordingly.
  - 2. Else, Units is set to Benefit Quantity
- xii. If the system parameter System.FoodBenefitDeliveryMethod = 'EBT', setup Peer Group Pricing Record for each Peer Group (Records will be associated to the UPC Detail Product Record):
  - 1. Effective Date is set to Date, Effective. If Date, Effective is blank then Effective Date will be set to current date.
  - 2. The Subcat Set checkbox is checked
  - 3. Price is calculated based on the respective Peer Group Pricing Subcategory record's Price (multiple by the Units above),
  - 4. Std Dev is calculated based on the respective Peer Group Pricing Subcategory record's Std Dev (multiple by the Units above),
  - 5. Factor is copied based on the respective Peer Group Pricing Subcategory record's Factor.
- c. If the UPC Detail Product Record does exist (defined as same UPC Number, Subcategory, and Effective Date) then update the record.
  - i. Description is set to Item Description
  - ii. UPC Unit Of Measure is set to Unit Of Measure (English code translation)
  - iii. Package Size is set to Package Size
  - iv. Benefit Quantity is set to Benefit Quantity
  - v. Benefit Description is set to Benefit Unit
  - vi. End Date is set to of Date, End
  - vii. Exclude from All Authorized is set by Purchase Indicator
  - viii. Calculate Units by:
    - 1. If Subcategory Unit of Measure and UPC Unit of Measure are in translation list (see business rule 4.p), then translate accordingly.
    - 2. Else, Units is set to Benefit Quantity

Note: The updating of units may be suspect if the UPC has been in use. It should be to correct a mistake.

**EXTRACT PROCESS**

- 6. If the system parameter System.FoodBenefitDeliveryMethod = 'FI', disable the Extract button, Extract File Location and Extract Start Date.

**Business Rules**

7. Disable the Extract button until a file location has been selected.
8. USDA does not require any file naming standard. Create the file in the file location using the following naming standard:

State UPC Upload File naming standard: UPC UP XX mmddyyyy hhmm.txt

Where:

UPC=Constant

UP=Constant (for Upload)

XX=state code (system parameter System.StateAbbrev)

mm=Processing date, month value

dd=Processing date, day value

yyyy=Processing date, year value

hh=Processing time, hour value

mm=Processing time, minute value

9. Create a UPC Detail Record for every active UPC Detail Product database row:
    - o Date is blank – that is in the database
    - o Date – whose Insert date is greater than or equal to the supplied value
    - a. UPC/PLU is set to UPC Number
    - b. Item Description is set to UPC Description
    - c. Category Code is set to UPC Category Number
    - d. Category Description is set to UPC Category Name
    - e. Sub-category Code is set to UPC Subcategory Number
    - f. Sub-category Description is set to UPC Subcategory Name
    - g. Unit of Measure is set to UPC Unit of Measure (English code translation)
    - h. Package Size is set to Package Size
    - i. Benefit Quantity is set to of Benefit Quantity
    - j. Benefit Unit is set to Benefit Description
    - k. Item Price – Set to zeroes
    - l. Price Type – Set to “00”
    - m. Card Acceptor ID Code – Set to blanks
    - n. Date, Effective is set to UPC Effective Date
    - o. IF UPC End Date has a date then set to Date, End; otherwise set to zeroes
- Purchase Indicator is set to UPC Exclude from All Authorized

**Developer Notes**

1. The record layouts are provided below.  
LOAD PROCESS
2. If file should be loaded to a database table then the file checking (business rule #2) validated. If invalid, delete records from database. If valid, continue.

**Developer Notes**

3. Process records, saving messages in table, then create report from messages and save work.
4. Upon completing the load process, create a file of UPC detail product data for the EBT Host system. See the Finance Interface with EBT Host DFDD for more details.

**UPC Detail Record**

<b>Data Element Name</b>	<b>Format</b>	<b>Position</b>	<b>Condition</b>	<b>USDA Notes</b>	<b>DFDD Notes</b>
Record Identification Code	PIC X(2)	1-2	Mandatory	Value = "D4" for a detail record	
Record Sequence Number	PIC 9(6)	3-8	Mandatory	Starting at "000001" and incrementing by one for each detail record	
Message Type Identifier	PIC 9(4)	9-12	Mandatory	Value = "1344"	
UPC/PLU	PIC 9(17)	13-29	Mandatory	Right Justified Zero Filled Includes initial digit and check digit	
Item Description	PIC X(50)	30-79	Mandatory		
Category Code	PIC 9(2)	80-81	Mandatory		Right Justified Zero Filled
Category Description	PIC X(50)	82-131	Mandatory		Left Justified Space Filled
Sub-category Code	PIC 9(3)	132-134	Mandatory	Leave blank if State Agency-only approved Infant Formula (not in WIC Works or National UPC database)	Right Justified Zero Filled
Sub-category Description	PIC X(50)	135-184	Mandatory		Left Justified Space Filled
Unit of Measure	PIC X(10)	185-194	Mandatory	Abbreviated description of the measure used to describe product content amount (e.g. "lb" for pound).	Left Justified Space Filled
Package Size	PIC 9(3)V99	195-199	Mandatory	Size of the contents of the package quantified in standard benefit units of measure	Zero Filled

Data Element Name	Format	Position	Condition	USDA Notes	DFDD Notes
Benefit Quantity	PIC 9(3)V99	200-204	Mandatory		Zero Filled
Benefit Unit	PIC X(50)	205-254	Mandatory	Text description (fully spelled-out) of the originator's specified benefit issuance unit of measure, per standard ANSI 260.1 – 1993	Left Justified Space Filled
Item Price	PIC 9(4)V99	255-260	Mandatory		Not used
Price Type	PIC X(2)	261-262	Mandatory	Values: "00" – Not Disclosed, "01" – Maximum Price, "02" – Contracted Price	Not used
Card Acceptor Identification Code	PIC X(15)	263-277	Mandatory	Used to identify the specific store using the UPC/PLU code	Not used
Date, Effective	PIC 9(8) mmddyyyy	278-285	Mandatory	If no date is entered, effective upon receipt	
Date, End	PIC 9(8) mmddyyyy	286-293	Mandatory	If no date is entered, authorization continues	
Purchase Indicator	PIC 9	294	Mandatory	Values: "0" – No, "1" - Yes	
Apply Product to Wildcard food subcategory (000)?					

### **1.6.1 National UPC Download File Report (Static)**

This is the National UPC Download File Report that is printed out each time a file load is executed (that gets past the file level edits).

#### **1.6.1.1 Language: English**

The National UPC Download File Report is produced in English only.

1.6.1.2 National UPC Download File Report Mockup

National UPC Download File Report  
10/1/2007

Cat Code	Cat Description	Sub-Cat Code	Sub-Category Description	Benefit Unit	Ben Qty	Pkg Size	UOM
xx	Test	xx		Tokens	x	x	x

Error: Category Code is not numeric  
 Error: Sub-Category Code is not numeric  
 Error: Sub-Category Description is blank  
 Error: UPC is not numeric  
 Error: UPC Description is blank  
 Error: Unit of Measure is not valid  
 Error: Benefit Quantity is not numeric  
 Error: Package Size is not numeric  
 Error: Purchase Indicator is not valid  
 Error: Effective Date is not valid

Cat Code	Cat Description	Sub-Cat Code	Sub-Category Description	Benefit Unit	Ben Qty	Pkg Size	UOM
00	Category Test	001	Subcat Test	Quarts	1	4	Gallons

Error: Category Code is not defined in the system

Cat Code	Cat Description	Sub-Cat Code	Sub-Category Description	Benefit Unit	Ben Qty	Pkg Size	UOM
01	Milk	001	Whole Milk	Dozens	1	4	Gallons

Error: Benefit Unit is not valid in relation to system unit of measure

23484569		Milk Product B		Quarts	1	4	Gallons
----------	--	----------------	--	--------	---	---	---------

Success: UPC Record has been updated

48394394		Milk Product C		Quarts	1	4	Gallons
----------	--	----------------	--	--------	---	---	---------

Success: UPC Record has been added

Cat Code	Cat Description	Sub-Cat Code	Sub-Category Description	Benefit Unit	Ben Qty	Pkg Size	UOM
62	WEMF	111	E028 Extra	Tokens	1	23	Tokens

Error: Benefit Unit is not Ounces  
 Error: Unit of Measure is not valid for Benefit Unit

Cat Code	Cat Description	Sub-Cat Code	Sub-Category Description	Benefit Unit	Ben Qty	Pkg Size	UOM
62	WEMF	112	E028 Extra	Ounces	1	23	Can

Warning: Subcategory/Container record created as deactivated due to more setup required  
 Success: UPC Record has been added

Records Loaded: 3  
 Records Errored: 4  
 Total Records: 7

Business Rules
1. Sort the records by Category Code and Sub-category Code.
2. If multiple errors on record, list all errors.

**Business Rules**

3. If a Subcategory/Container record was created, print a warning message about it being deactivated due to more setup needed.
4. If a UPC Detail record was loaded or updated, print a success message.
5. Print Totals at end of report:
  - a. Records Loaded
  - b. Records Errored
  - c. Total Records

**Developer Notes**

## Potential Design (steps)

1. Load file to temp database table while checking for file level errors.
2. Check file level errors
  - a. If found, delete temp database table and display file level errors on screen.
  - b. If not found, go to step 3
3. Process temp database table
  - a. Create temp message table (associated to records in temp database table)
  - b. Create food records when records are successful
4. Generate report from temp database and message table.
5. Delete temp database and message table.

## 2 Manufacturer

The Manufacturer screens are used to manage information regarding product manufacturers. The first screen, Details, is used to record basic information about a manufacturer including the name, contact information and address information. The next screen is to record rebate information identifying the formulas and entering their corresponding effective date, end date, rate and group numbers. This screen also allows the printing of the manufacturer’s rebate invoice.

### 2.1 Details

The Details screen is used to enter details about manufacturers. This includes manufacturer name, contact information and address. The address’ primary use is for the mailing of the rebate invoice.

> *Manufacturer* > *Details*

The screenshot shows a web-based form for entering manufacturer details. At the top, there is a dropdown menu for 'Manufacturer' with 'Meade Johnson' selected, and a 'Deactivate' checkbox. Below this is a 'Manufacturer Name' field containing 'Meade Johnson'. The form is divided into two main sections: 'Contact Person' and 'Address'. The 'Contact Person' section includes fields for 'Contact Name', 'Contact Title', 'Business Phone Number' (with area code '(123) 123-4567' and extension 'Ext 123'), 'Business Fax Number' (with area code '(123) 123-4567'), 'Email Address' (with value 'Sales@MeadJohnson.com'), and a 'Manufacturer Comments' text area. The 'Address' section, enclosed in a dashed border, includes fields for 'Attention Name', 'Address Line 1' (with value '123 anywhere street'), 'Address Line 2', 'Suite', 'P.O. Box', 'City' (with value 'shenectady'), 'State' (with dropdown 'New York'), 'Zip Code' (with value '12345' and a '(+4)' field), and 'County' (with dropdown 'Schenectady').

Control	Description	
New	The New command button is used to create a new manufacturer record.	
	Type	Command Button
	Hot Key	Alt + N
Edit	The Edit command button is used to update a manufacturer record.	
	Type	Command Button
	Hot Key	Alt + T

Control	Description			
Manufacturer	This is the record selector for the manufacturer records.			
	<b>Type</b>	Record Selector		
	<b>DB</b>	Manufacturer.Name		
	<b>Contents</b>	Names		
Deactivate	A checkbox used to indicate that the manufacturer is deactivated.			
	<b>Type</b>	Checkbox		
	<b>DB Column</b>	Manufacturer.Status		
Manufacturer Name	The name of the manufacturer.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	50		
	<b>Validation</b>	NA		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Manufacturer.Name		
Contact Person	The name of the contact person for the selected manufacturer.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	40		
	<b>Validation</b>	NA		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Manufacturer.ContactNm		
Contact Title	The title of the contact person for the selected manufacturer.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	30		
	<b>Validation</b>	NA		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Manufacturer.ContactTitle		

Control	Description			
Business Phone Number	The manufacturer's 10-digit business telephone number, including area code.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	10		
	<b>Validation</b>	Numeric and Complete (999) 999-9999		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Manufacturer.BusinessAreaCode Manufacturer.BusinessPhoneNr		
Ext	The manufacturer's telephone extension.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	5		
	<b>Validation</b>	Numeric		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Manufacturer.BusinessPhoneExt		
Business Fax Number	The manufacturer's 10-digit business fax number, including area code.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	10		
	<b>Validation</b>	Numeric and Complete (999) 999-9999		
	<b>Display Only</b>	No	<b>Display Only</b>	No
	<b>DB Column</b>	Manufacturer.FaxAreaCode Manufacturer.FaxPhoneNr		
Email Address	The manufacturer contact's email address.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	50		
	<b>Validation</b>	Must contain [ @ ] and [ . ] and at least two characters after the [ . ].		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Manufacturer.EmailAddress		

Control	Description			
Manufacturer Comments	Comments about the Manufacturer.			
	Type	Text Box		
	Required	No		
	Length	900		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	Manufacturer.Comment		
Address: Attention Name	An attention name that appears when the address is used on a letter or label. This name, if one exists, appears on a separate address line in the form Attn: [attention name].			
	Type	Text Box		
	Required	No		
	Length	40		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	Manufacturer.AttentionNm		
Address: Address Line 1	The first line of the manufacturer's address. Either Address Line 1 must contain a value or P.O. Box must contain a value to have a valid address.			
	Type	Text Box		
	Required	Yes – If no data in PO Box		
	Length	30		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	Manufacturer.StreetAddrLine1		
Address: Address Line 2	The second, optional line of a manufacturer's address.			
	Type	Text Box		
	Required	No		
	Length	30		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	Manufacturer.StreetAddrLine2		

Control	Description			
Address: Suite	The suite number of a manufacturer's address.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	5		
	<b>Validation</b>	NA		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Manufacturer.Suite		
Address: P.O. Box	The Post Office Box Number of a manufacturer's address. Either Address Line 1 must contain a value or P.O. Box must contain a value in order to have a valid mailing address.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes – If no data in address line 1		
	<b>Length</b>	5		
	<b>Validation</b>	NA		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Manufacturer.POBox		
Address: City	The City component of the manufacturer's address. When a valid ZIP Code is entered, the City is automatically populated based on the ZIP Code. If a valid ZIP Code has more than one possible City, the choices are displayed in a pop-up window where the user must select the correct value			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	30		
	<b>Validation</b>	NA		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Manufacturer.City		
Address: State	The State field identifies the state of the manufacturer's address. When a valid ZIP Code is entered, the State is automatically populated based on the ZIP Code.			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes		
	<b>DB Column</b>	Manufacturer.State		
	<b>Code ID</b>	State table lookup		

Control	Description			
Address: Zip Code	The 5-digit ZIP Code of the manufacturer's address. When a valid ZIP Code is entered, the City, State and County fields are automatically populated based on the ZIP Code. If a valid ZIP Code has more than one possible City and/or County value, the choices are displayed in a pop-up window where the user must select the correct value.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	5		
	<b>Validation</b>	Numeric and Complete		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Manufacturer.ZipCode		
Address: (+4)	The optional, 4-digit ZIP Code extension of a manufacturer's address.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	4		
	<b>Validation</b>	Numeric and Complete		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	Manufacturer.ZipPlus4		
Address: County	The county where the manufacturer is located. When a valid ZIP Code is entered, the County field is automatically populated based on the ZIP Code. If a valid ZIP Code has more than one possible County, the choices are displayed in a pop-up window where the user must select the correct value.			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes		
	<b>DB Column</b>	Manufacturer.CountyNm		
	<b>Code ID</b>	County table lookup		

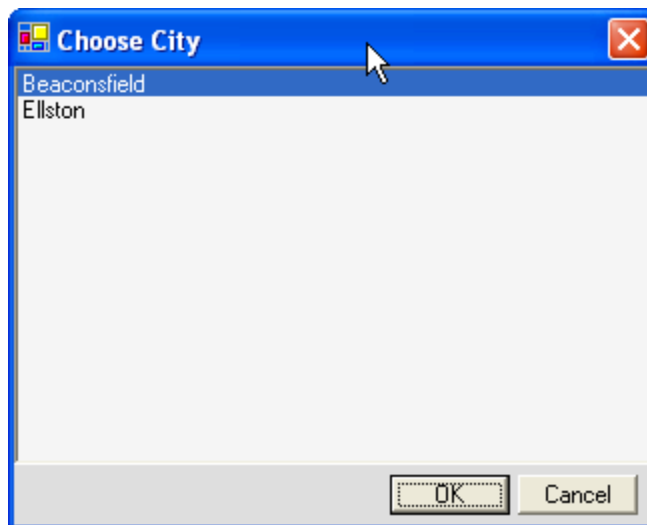
Control	Description			
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this contact/address record is displayed.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of 'firstname lastname mm/dd/yyyy'		
	Display Only	Yes	Calculated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

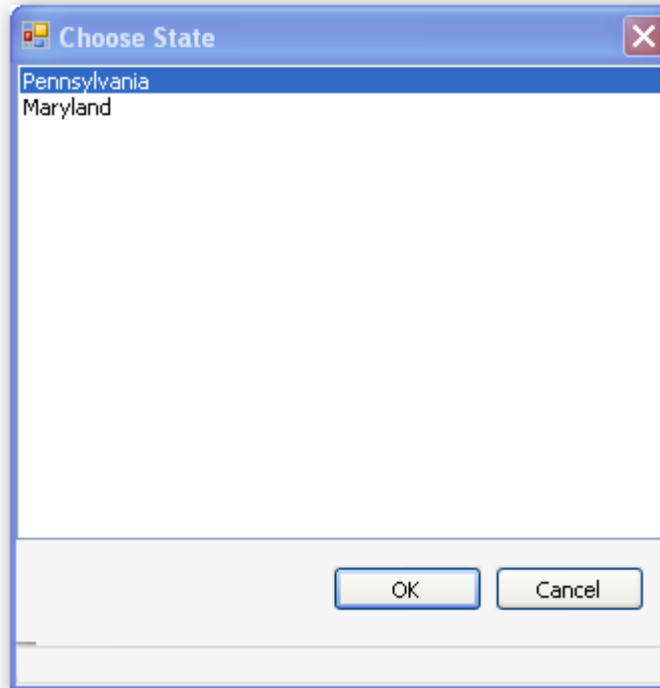
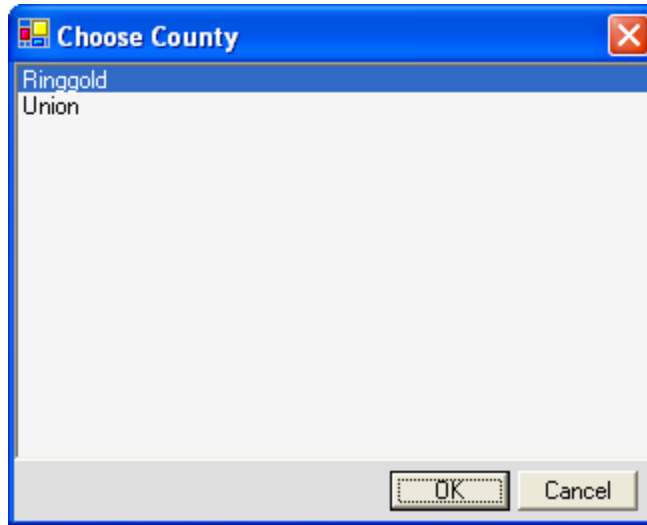
Business Rules
<ol style="list-style-type: none"> <li>1. Tab order for address goes from Address Line 1 to the ZIP code field. This tab order allows the user to use the automatic ZIP code database that is incorporated in the data system.</li> <li>2. When more than one city or county is covered by the entered zip code, a pop-up presents all cities or counties covered by the zip code for the user to select the appropriate zip code.</li> </ol>

Developer Notes
1.

### 2.1.1 Choose City/County/State Pop-ups

The Choose City/County/State Pop-ups allow the user to select the city/county/State with which the manufacturer should be associated. Within the ZIP+4 database, some zip codes cover multiple cities or counties.





Control	Description			
Choose City or Choose County or Choose State	Text box that lists the possible cities/counties/states for a specific zip code.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes, if ambiguous cities/counties/states		
	<b>Length</b>	NA		
	<b>Validation</b>	Listed in alphabetical order		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	From state zip code validation, Ex: ZP-4		
OK	Clicking the OK button selects the highlighted city/county/state and returns the user to the Contact/Address screen.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + O		
Cancel	Clicking the Cancel button returns the user to the Contact/Address screen without making a selection.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + L		

Business Rules
1.

Developer Notes
1.

## 2.2 Rebates

The Rebates screen is used to create, update, view and delete rebate information for specific food items for each manufacturer. For paper FI states, rebate information is setup at the container level. For EBT states, rebate information is setup at the UPC detail product level.

Rebate rate information is able to be entered against any container with a manufacturer. However, rebate invoices are only available for formula foods. Clinic service functionality does not mark non-formula issued foods to be able to be counted for rebate invoices. For non-formula foods to have rebate invoices, clinic service functionality would need to be enhanced.

This screen is only available to paper FI based states (states where the system parameter System.FoodBenefitDeliveryMethod is set to "FI").

> *Manufacturer* > *Rebates*

Manufacturers

Containers

Invoice Month

Rebate				
	Effective Date	End Date	Rate	Invoice Description
▶	10/02/2006	11/01/2006	1.27384	Enfamil Lipil with Iron
	12/02/2006	02/02/2007	1.53432	Enfamil Lipil with Iron
	10/13/2008	10/18/2111	1.53432	Enfamil Lipil with Iron

This screen is only available to EBT based states (states where the system parameter System.FoodBenefitDeliveryMethod is set to "EBT").

> *Manufacturer* > *Rebates*

Manufacturers  9 of 10

UPC/PLU Detail Product  5 of 37

Rebates

Invoice Month

Rebate			
	Effective Date	End Date	Rate
▶	03/01/2009	02/28/2010	\$1.32180

Control	Description	
Manufacturers	A list box containing all manufacturers.	
	<b>Type</b>	Record Selector
	<b>Required</b>	Yes
	<b>DB Column</b>	Manufacturer Name
	<b>Code ID</b>	Manufacturer table lookup
Containers (FI state only)	This is the record selector for all of the containers that are available for any subcategory that was marked with this manufacturer.	
	<b>Type</b>	Record Selector
	<b>Content</b>	Container Descriptions
UPC/PLU Detail Product (EBT state only)	This is the record selector for all of the detail products that are available for any subcategory that was marked with this manufacturer.	
	<b>Type</b>	Record Selector
	<b>Content</b>	UPC Number + UPC Description + UPC Effective Start Date
Add Row	Clicking the Add Row button creates a new row in the rebate data grid allowing the user to complete the information about the rebate.	
	<b>Type</b>	Command Button
	<b>Hot Key</b>	Alt + A
Remove Row	Clicking the Remove Row command button removes the selected row from the data grid and deletes the record in the database.	
	<b>Type</b>	Command Button
	<b>Hot Key</b>	Alt + R
Print Rebate Invoice	Clicking the Print Rebate Invoice button initiates a print process of rebates based upon the invoice period selected.	
	<b>Type</b>	Command Button
	<b>Hot Key</b>	Alt + P

Control	Description			
Invoice Month	The Invoice Month is a selection of the calendar months of the year. The invoice to be printed would be the most recent previous month selected. For example, if the date is May 3, 2007 and March is selected, then March 2007 is the invoice would be produced.			
	<b>Type</b>	List Box		
	<b>Required</b>	No		
	<b>DB Column</b>	Not Stored		
	<b>Code ID</b>	Invoice Print Month This code element is non-editable. The installed values are: January February March April May June July August September October November December		
Rebate	The product package rebate data grid displays date records for the selected manufacturer container.			
Rebate - Effective Date	The effective date of the selected manufacturer rebate. Must be equal to or earlier than rebate end date.			
	<b>Type</b>	Date Picker		
	<b>Required</b>	Yes		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	FIRebateRate.EffectiveDt UPCRebateRate.EffectiveDt		
Rebate - End Date	The end date of the selected manufacturer rebate. Must be equal to or later then rebate effective date.			
	<b>Type</b>	Date Picker		
	<b>Required</b>	Yes		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	FIRebateRate.EndDt UPCRebateRate.EndDt		

Control	Description			
Rebate - Rate	The rebate rate for the selected manufacturer rebate.			
	Type	Text Box		
	Required	Yes		
	Length	Decimal 9,5		
	Validation	Numeric, Mask of \$Z,ZZ9.99999		
	Display Only	No	Calculated	No
	DB Column	FIRebateRate.RebateRt UPCRebateRate.RebateRt		
Rebate - Invoice Description (FI States only)	The invoice description for the selected rebate. This field is the text that is actually printed on the invoice. It may be different than the Container description that is printed on the FI.			
	Type	Text Box		
	Required	No		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	FIRebateRate.RebateInvoiceDc		

Business Rules
<ol style="list-style-type: none"> <li>1. For EBT states (system parameter System.FoodBenefitDeliveryMethod set to "EBT"), do not display the grid field entitled Invoice Description.</li> <li>2. Display an error message if the effective dates time period overlap.</li> <li>3. For FI states (system parameter System.FoodBenefitDeliveryMethod set to "FI"), when a row is added, automatically populate the invoice description with the previous invoice description.</li> <li>4. Enable the Print Rebate Invoice command button only when there is a value in the Invoice Month.</li> </ol>

Developer Notes
<ol style="list-style-type: none"> <li>1. For FI states, the record selector is the Container. For EBT states, the record selector is the UPC detail product.</li> </ol>

### 2.2.1 Infant Formula Rebate Invoice

This is the monthly infant rebate invoice that is printed out for each manufacturer. The mockups differ based on which benefits delivery (EBT, FI Formula Only, FI Mixed).

#### 2.2.1.1 Language: English

The Infant Formula Rebate Invoice is produced in English only.

**2.2.1.2 Rebate Invoice (Dynamic)**

**FI State Using Mixed FIs: REBATE INVOICE MOCKUP**

**COLORADO WIC PROGRAM**  
 The Formula Company **Infant Formula Rebate Invoice**  
**Redemption Month: May 2007**

ISSUE MONTH	ISSUED	FORMULA ONLY CHECKS		MIXED FOOD PKG CHECKS		TOTAL UNITS	REBATE AMOUNT	INVOICE AMOUNT
		NUMBER OF UNITS	PARTIAL REDEMPT RATE	NUMBER OF UNITS	PARTIAL REDEMPT RATE			
SIMILAC W/IRON 32 OZ RTF								
MARCH		0	0.9823	0	1.0000	0	1.9869	\$0.00
APRIL	214	125	0.9823	89	1.0000	212	1.9869	\$420.80
MAY	366	214	0.9823	152	1.0000	362	1.9869	\$719.68
TOTAL	580	339	0.9823	241	1.0000	574		\$1,140.48
SIMILAC W/IRON 13 OZ CONC								
MARCH	62	29	0.9933	33	0.9952	62	3.6240	\$223.41
APRIL	2,778	1317	0.9933	1,461	0.9952	2,762	3.6240	\$10,010.08
MAY	4,413	2092	0.9933	2,321	0.9952	4,388	3.6240	\$15,901.54
TOTAL	7,253	3,438	0.9933	3,815	0.9952	7,212		\$26,135.03
...(every formula is listed)								
SIMILAC L/FREE ADV 13 OZ CONC								
MARCH	17	9	1.0000	8	0.0000	9	3.9990	\$34.42
APRIL	239	121	1.0000	118	0.0000	121	3.9990	\$483.95
MAY	285	149	1.0000	146	0.0000	149	3.9990	\$597.35
TOTAL	551	279	1.0000	272		279		\$1,115.72
SIMILAC LAC/FREE ADV 12.9 OZ PWD								
MARCH	45	17	0.9906	28	0.0000	16	11.5650	\$189.04
APRIL	2523	925	0.9906	1,598	0.0000	916	11.5650	\$10,702.88
MAY	4108	1506	0.9906	2,602	0.0000	1,492	11.5650	\$17,257.17
TOTAL	6,676	2,448	0.9906	4,228		2,425		\$28,149.08
TOTALS								
MARCH								\$8,723.00
APRIL								\$596,714.32
MAY								\$1,040,816.20
TOTAL								\$1,646,253.52

Infants Served During Month:  
 Breastfed 595  
 Supplemented with Formula 2,819  
 Formula Fed 13,646  
 Total 17,060

I certify that the above information is true and correct to the best of my knowledge. Payment is due within 35 days of invoice postmark date.

CDPHE  
 Attn: Susan Thomson  
 4300 Cherry Creek Dr. South  
 Denver, CO, 80246

Send Rebate Invoice to:  
 Attn: John Formula  
 123 Anywhere Street  
 Shenectady, NY 12345

**FI State Using Only FIs: REBATE INVOICE MOCKUP**

**UTAH WIC PROGRAM**

The Formula Company **Infant Formula Rebate Invoice**  
**Redemption Month: May 2007**

MONTH	ISSUED	REDEMP RATE	TOTAL UNITS	REBATE AMOUNT	INVOICE AMOUNT
SIMILAC W/IRON 32 OZ RTF					
MARCH	0	1.0000	0	1,9889	\$0.00
APRIL	214	1.0000	214	1,9889	\$425.20
MAY	366	1.0000	366	1,9889	\$727.21
TOTAL	580	1.0000	580		\$1,152.40
SIMILAC W/IRON 13 OZ CONC					
MARCH	62	0.9952	62	3,6240	\$223.61
APRIL	2,778	0.9952	2,765	3,6240	\$10,019.15
MAY	4,413	0.9952	4,392	3,6240	\$15,915.95
TOTAL	7,253	0.9952	7,218		\$26,158.70
...(every formula is listed)					
SIMILAC L/FREE ADV 13 OZ CONC					
MARCH	17	0.9888	17	3,9990	\$67.22
APRIL	239	0.9888	236	3,9990	\$945.06
MAY	295	0.9888	292	3,9990	\$1,166.49
TOTAL	551	0.9888	545		\$2,178.77
SIMILAC LAC/FREE ADV 12.9 OZ PWD					
MARCH	45	0.9978	45	11,5660	\$519.28
APRIL	2523	0.9978	2,517	11,5660	\$29,218.39
MAY	4108	0.9978	4,099	11,5660	\$47,404.50
TOTAL	6,676	0.9978	6,661		\$77,142.17
<b>TOTALS</b>					
MARCH					\$8,723.00
APRIL					\$596,714.32
MAY					\$1,040,816.20
TOTAL					\$1,646,253.52

Infants Served During Month:  
 Breastfed 595  
 Supplemented with Formula 2,819  
 Formula Fed 13,646  
 Total 17,060

I certify that the above information is true and correct to the best of my knowledge.  
 Payment is due within 35 days of invoice postmark date.

Utah WIC  
 Attn: Susan Thomson  
 4300 Cherry Creek Dr. South  
 Salt Lake City, UT 52343

Send Rebate Invoice to:  
 Attn: John Formula  
 123 Anywhere Street  
 Shenectady, NY 12345

**EBT State (Same as FI State Using Only FIs except issuance month equal redemption month): REBATE INVOICE MOCKUP**

**WYOMING WIC PROGRAM**  
 The Company **Rebate Invoice**  
**Redemption Month: May 2007**

MONTH	REDEEMED	REDEMT RATE	TOTAL UNITS	REBATE AMOUNT	INVOICE AMOUNT
SIMILAC WIRON 32 OZ RTF					
MAY	366	1.0000	366	1.9869	\$727.21
TOTAL	366	1.0000	366		\$727.21
SIMILAC WIRON 13 OZ CONC					
MAY	4,413	1.0000	4,413	3.6240	\$15,992.71
TOTAL	4,413	1.0000	4,413		\$15,992.71
... (every formula is listed)					
SIMILAC L/FREE ADV 13 OZ CONC					
MAY	295	1.0000	295	3.9990	\$1,179.71
TOTAL	295	1.0000	295		\$1,179.71
SIMILAC LAC/FREE ADV 12.9 OZ PWD					
MAY	4,108	1.0000	4,108	11.5650	\$47,509.02
TOTAL	4,108	1.0000	4,108		\$47,509.02
TOTALS					
MAY					\$1,040,816.20
TOTAL					\$1,646,253.52

Infants Served During Month:  
                                   Breastfed                  595  
                                   Supplemented with Formula      2,819  
                                   Formula Fed                  13,646  
                                   Total                          17,060

I certify that the above information is true and correct to the best of my knowledge.  
 Payment is due within 35 days of invoice postmark date.

CDPHE  
 Attn: Susan Thomson  
 12 Mian Street  
 Cheyenne, WY 11111

Send Rebate Invoice to:  
 Attn: John Formula  
 123 Anywhere Street  
 Shenectady, NY 12345

<b>Business Rules</b>
<ol style="list-style-type: none"> <li>1. For the Redemption Month, the invoice that would be printed would be the most recent previous month that was selected in the Invoice Month. For example, if the date is May 3, 2007 and March is selected, then March 2007 is the invoice that would be produced.</li> <li>2. For the Issue Month:                         <ol style="list-style-type: none"> <li>a. For paper FI states (system parameter System.FoodBenefitDeliveryMethod of "FI"), the first month is the redemption month minus two months. For example, March 2007 is the redemption month then January 2007 would be the first issue month reported (followed by February 2007 and March 2007).</li> </ol> </li> </ol>

**Business Rules**

- b. For EBT states (system parameter System.FoodBenefitDeliveryMethod of "EBT"), the issue month is the redemption month. For example, March 2007 is the redemption month then March 2007 would be the issue month reported.
- 3. The formulas within a issue month are sorted by their description which is:
  - a. For paper FI states (system parameter System.FoodBenefitDeliveryMethod of "FI"), the format is the Invoice Description.
  - b. For EBT states (system parameter System.FoodBenefitDeliveryMethod of "EBT"), the format is the UPC Detail Description.
- 4. A detail line will be produced for each rebate rate that is effective for any portion of the month. For example, a product has an effective rate from the 1<sup>st</sup> thru the 14<sup>th</sup> with another effective rate from the 18<sup>th</sup> thru the end of the month. Two lines would be written, one for the 1<sup>st</sup> thru the 14<sup>th</sup> and one for the 18<sup>th</sup> thru the end of the month. Product for the 15<sup>th</sup> thru the 17<sup>th</sup> would not be in the count.
- 5. The Monthly Rebates Count batch process captures the previous month counts by counting the rebate counts. This process is found in the batch process DFDD.
- 6. For FI States using Mixed FIs:
  - a. The Formula Only Checks columns are for the younger infant age group (before they start receiving other foods). The calculation for each formula (brand and form) for this group (no Mixed Formulas here)
    - i. Count the total quantity issued on formula only checks ("FOC Formula Only Issue Count"; example of 2100 counted).
    - ii. Count the total quantity redeemed on formula only checks ("FOC Formula Only Redeemed Count" (example of 2083 counted).
    - iii. Divide "FOC Formula Only Redeemed Count" (2083) by "FOC Formula Only Issue Count" (2100) to get the "FOC Partial Redemption Rate" (.9919). This is the Formula Only Checks Partial Redemption Rate column.
    - iv. Apply to each Issue month by counting the total quantity of each formula issued on formula only checks ("FOC Month One Total Issue Count"; example of month one being 600). This is the Formula Only Checks Number of Units column.
    - v. Multiple "FOC Month One Total Issued Count" (600) by "FOC Partial Redemption Rate" (.9919) to get "FOC Month One Rebate Count" (595.1428).
  - b. The Mixed Food Pkg Checks columns are for the older infant age group (when they start receiving other foods). The calculation for each formula (brand and form) for this group:
    - i. Count the total quantity issued on formula only checks ("MFPC Formula Only Issue Count"; example of 1200 counted).
    - ii. Count the total quantity redeemed on formula only checks. ("MFPC Formula Only Redeemed Count"; example of 1191 counted).
    - iii. Divide "MFPC Formula Only Redeemed Count" (1191) by "MFPC Formula Only Issue Count" (1200) to get the "MFPC Partial Redemption Rate" (.9925). This is the Mixed Food Pkg Checks Partial Redempt Rate column.

**Business Rules**

- iv. Apply to each Issue month by counting the total quantity of each formula issued on formula only and mixed formula checks ("MFPC Month One Total Issue Count"; example of month one being 500 on formula only + 50 mixed FI checks). This is the Mixed Food Pkg Checks Number of Units column.
  - v. Multiple "MFPC Month One Total Issued Count" (550) by "MFPC Partial Redemption Rate" (.9925) to get "MFPC Month One Group Rebate Count" (545.875).
  - c. The Redeemed column is equal to the FOC Month One Total Issued Count plus the MFPC Month One Total Issued Count.
  - d. The Total Units column is calculated by rounding the sum of the non-rounded values of the "FOC Month One Group Rebate Count" (595.1428) and "MFPC Month One Group Rebate Count" (545.875) (equals 1441.0178 rounded to 1441).
  - e. The Invoice Amount is calculated by rounding the multiplied rebate rate (example of 1.9824) \* the Unrounded Total Units (example above would be 1441.0178) (example equals 2261.9536 rounded to \$2,261.95).
7. Breastfed: The Monthly Participant Counts batch process captures the previous month counts by counting the participants whose type is infant that are breastfeeding. This process is found in the batch process DFDD.
8. Supplemented with Formula: The Monthly Participant Counts batch process captures the previous month counts by counting the participants whose type is infant that were supplemented with Formula. This process is found in the batch process DFDD.
- a. Formula Fed: The Monthly Participant Counts batch process captures the previous month counts by counting the participants whose type is infant that is formula fed. This process is found in the batch process DFDD.

**Developer Notes**

1.

### 3 Participant Profiles

This Participant Profiles screen enables the user to manage profile data that describes categories of participants. The participant profiles are used to validate food packages (via food rules) and to automate food package switches as participant attributes change (i.e. milestones). Each participant category can have many profiles to address different circumstances such as if the participant is on a special diet, or exclusively breastfeeding. In addition the profiles address age categories for infant and children's food packages.

> *Participant Profiles*

Add Row

Profiles										
	Part Category	BF	Spec Diet	Multiples	Min Age	Max Age	Allow C&A	Pkg Switch	Model Pkg Switch	Deactivate
>	Infant	Full	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Child	NA	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Breastfeeding	Full BF	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Non-Breastfeeding	NA	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	Pregnant	NA	<input type="checkbox"/>	<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Control	Description
Add Row	Clicking the Add Row command button causes a new row to be added to Participant Profile.
	<b>Type</b> Command Button
	<b>Hot Key</b> Alt + A
Profiles	Data grid contains the individual participant profiles.
	<b>Type</b> Data grid
	<b>Display</b> No
Part Category	A list box that contains valid participant categories used in the process of validating model food packages.
	<b>Type</b> List Box
	<b>Required</b> Yes, length of 18
	<b>DB Column</b> ParticipantProfile.Participant TypeCd
	<b>Code ID</b> Part Type Code This code element is non-editable. The installed values are: Infant Child Pregnant Breastfeeding Not Breastfeeding

Control	Description			
BF	A list box containing all active participant profiles			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes, if Part Category is Infant or Breastfeeding		
	<b>Code ID</b>	<p>For Infants, BF Description (as selected on the Nutrition Interview) is used to designate the BF status in participant profiles. The values include:</p> <p>None – No Longer BF, Never BF                      Partial– Partially Breastfeeding                      Full – Exclusively BF, Primarily Exclusive/No Formula Package, Primarily Exclusive/ Complementary Foods</p> <p>For Breastfeeding women, the WIC Formula Level, which is based on the infant that is BF the most, is used to determine the BF status in participant profiles. (See 6.2.10 WIC Formula Level.) The values include:</p> <p>Full BF – No WIC Formula, infant is not receiving any formula from WIC.                      Part In – Partial BF Within Range, infant’s formula amount in the Food Package is within the range allowed for the BF mom to receive a greater food package than allowed if formula amount is above the designated range.                      Part Out – Partial BF Out of Range, infant’s formula amount in the Food Package is above the range allowed for mom to receive a greater amount of foods.</p> <p>No BF – Full Formula, infant’s formula amount within the Food Package is high enough to be considered fully formula fed.</p>		
Spec Diet	Indicates if the profile is for a participant that requires a special diet.			
	<b>Type</b>	Check Box		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ParticipantProfile.SpecialDietIn		
Multiples	Indicates if the profile is for a participant that is currently either breastfeeding multiples or is pregnant with multiples.			
	<b>Type</b>	Check Box		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ParticipantProfile.MultiplesIn		

Control	Description			
Min Age	The minimum age in months of the participant for the profile.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	Integer 2		
	<b>Validation</b>	Numeric		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ParticipantProfile.MinAgeMoNr		
Max Age	The maximum age in months of the participant for the profile.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	Integer 2		
	<b>Validation</b>	Numeric		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ParticipantProfile.MaxAgeMoNr		
Allow C&A	A checkbox used to indicate that the participant profile is allowed to be 'combined and averaged' against the maximum food rules.			
	<b>Type</b>	Checkbox		
	<b>DB Column</b>	ParticipantProfile.CombineAverageIn		
Pkg Switch	Indicates if the profile will be used to automatically switch a participant who matches the profile to the entered model food package.			
	<b>Type</b>	Check Box		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ParticipantProfile.FoodPackageSwitchIn		
Model Pkg Switch	The model food package for the participant profile that will be automatically switched to if the package switch is set.			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes, If Pkg Switch is checked		
	<b>DB Column</b>	ModRXPartProfile.DefaultModelIn		
	<b>Code ID</b>	Model Food Package table lookup (only those packages that have been assigned to this profile)		

Control	Description			
Deactivate	A check in the Deactivate check box signifies that the selected profile is no longer active for use in defining and validating model food packages.			
	<b>Type</b>	Check Box		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ParticipantProfile.Status		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of any profile record are displayed.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	NA		
	<b>Validation</b>	Mask of 'firstname lastname mm/dd/yyyy'		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	ParticipantProfile.ModifyStfpID + ParticipantProfile.ModifyDt		

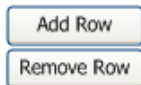
Business Rules
<ol style="list-style-type: none"> <li>1. Display an error if each participant category does not have at least one active participant profile defined.</li> <li>2. Display an error if a participant profile is duplicated based on the Part Category, Excl BF, Spec Diet, Multiples, Min Age and Max Age attributes.</li> <li>3. Display an error if the infants age is not between 0 and 12 months.</li> <li>4. Display an error if the children age is not between 11 and 60 months</li> <li>5. Display an error if an age is entered for an adult.</li> <li>6. Display an error if each age range for infants and children overlap. Do not include deactivated rows in this check.</li> <li>7. Display an error if the profile is active (Deactivate not checked) and the Pkg Switch is checked and there is no Model Pkg Switch.</li> <li>8. Display an error if a participant profile is deactivated and the Pkg Switch is checked.</li> <li>9. Sort by Part Category and Min Age.</li> <li>10. Display an error if any food rule (from Rule Participant Profiles screen) or model food package (from Package Participant Profiles screen) associations exist when deactivating a profile.</li> <li>11. Display an error if the package switch indicator is checked and there is a change food rule defined for the profile (participants cannot auto-switch and auto-change at the same time).</li> </ol>

Developer Notes
1.

## 4 WIC Formula Level

The WIC Formula Level table is used to determine a breastfeeding woman’s participant profile attribute based on the amount of formula that her infant is receiving from WIC. If multiple infants from the same pregnancy are on WIC, then each infant’s food package is evaluated. The food package (if there is one) of the infant that is breastfeeding the most is used to determine the WIC Formula Level. The Infant BF participant profile levels define level of breastfeeding from most to least: Full, Partial, None.

> *WIC Formula Level*



WIC Formula Levels					
Min Age	Max Age	Form	Min Oz	Max Oz	WIC Formula Level
0	0	Concentrate	1	104	Partial BF Within Range
0	0	Concentrate	105	999	Partial BF Out Of Range
0	0	Powder	1	104	Partial BF Within Range
0	0	Powder	105	999	Partial BF Out Of Range
0	0	RTF	1	104	Partial BF Within Range
0	0	RTF	105	999	Partial BF Out Of Range
0	11	Concentrate	0	0	No WIC Formula
0	11	Powder	0	0	No WIC Formula
0	11	RTF	0	0	No WIC Formula
1	3	Concentrate	1	364	Partial BF Within Range
1	3	Concentrate	365	999	Partial BF Out Of Range
1	3	Powder	1	435	Partial BF Within Range
1	3	Powder	436	999	Partial BF Out Of Range
1	3	RTF	1	384	Partial BF Within Range
1	3	RTF	385	999	Partial BF Out Of Range
4	5	Concentrate	1	442	Partial BF Within Range
4	5	Concentrate	443	999	Partial BF Out Of Range
4	5	Powder	1	522	Partial BF Within Range
4	5	Powder	523	999	Partial BF Out Of Range
4	5	RTF	1	448	Partial BF Within Range
4	5	RTF	449	999	Partial BF Out Of Range
6	11	Concentrate	1	312	Partial BF Within Range
6	11	Concentrate	313	999	Partial BF Out Of Range
6	11	Powder	1	384	Partial BF Within Range
6	11	Powder	385	999	Partial BF Out Of Range
6	11	RTF	1	320	Partial BF Within Range
WinSnap 6	11	RTF	321	999	Partial BF Out Of Range

Control	Description	
Add Row	Clicking the Add Row command button causes a new row to be added to WIC Formula Level grid.	
	Type	Command Button
	Hot Key	Alt + A

Control	Description			
Remove Row	Clicking the Remove Row command button causes the selected row to be deleted from WIC Formula Level grid.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + R		
WIC Formula Levels	Data grid contains the WIC Formula Level grid records.			
	<b>Type</b>	Data grid		
	<b>Display</b>	No		
Min Age	The minimum age in months of the infant.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Integer 2, Mask of Z9.		
	<b>Validation</b>	Numeric, Range is 0 to 11		
	<b>Display Only</b>	No	<b>Calculated</b>	No
Max Age	The maximum age in months of the infant.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Integer 2, Mask of Z9.		
	<b>Validation</b>	Numeric, Range is 0 to 11		
	<b>Display Only</b>	No	<b>Calculated</b>	No
Form	A list box that contains the form of the formula.			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes, length of 11		
	<b>Code ID</b>	Formula Type This code element is non-editable. The installed values are: Powdered Concentrate Ready To Feed Pudding		
Min Oz	The minimum ounce level.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Integer 3, Mask of Z9.		
	<b>Validation</b>	Numeric, Range is 0 to 999		
	<b>Display Only</b>	No	<b>Calculated</b>	No

Control	Description			
Max Oz	The maximum ounce level.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Integer 3, Mask of Z9.		
	<b>Validation</b>	Numeric, Range is 0 to 999		
	<b>Display Only</b>	No	<b>Calculated</b>	No
WIC Formula Level	These are the values which are used to determine a breastfeeding woman's participant profile attribute based on the amount of formula that her infant is receiving from WIC.			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes, length of 25		
	<b>Code ID</b>	WIC Formula Level This code element is non-editable. The installed values are: Partial BF Within Range Partial BF Out of Range No WIC Formula		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of any profile record are displayed.			
	<b>Type</b>	Text Box		
	<b>Required</b>	NA		
	<b>Length</b>	NA		
	<b>Validation</b>	Mask of 'firstname lastname mm/dd/yyyy'		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No

<b>Business Rules</b>
<ol style="list-style-type: none"> <li>1. Display an error if any form does not have ages from 0 to 11 covered.</li> <li>2. Display an error if any form and age (at each month of 0 to 11) does not have ounces from 0 to 999 covered.</li> <li>3. Display an error if any overlap occurs within a combination of form, ages and ounces.</li> <li>4. Display an error if Pudding is selected as a Form type. Note: If a 'pudding' formula is found in an infant package then it will be considered a RTF so there is no reason to create any pudding records in the WIC Formula Level table.</li> <li>5. Sort the grid by Min Age, Max Age and Form.</li> <li>6. Display an error if the Min Age is greater than Max Age.</li> <li>7. Display an error if the Min Oz is greater than Max Oz.</li> </ol>

**Developer Note**

1. Although 0 is the lowest ounce number, the table will not be accessed for 0. The system is smart enough to know that 0 ounces denotes a full breastfeeding mom.
2. When adding a row, the Min Age, Max Age, Min Oz and Max Oz default to zero as numeric fields.

## 5 Food Rules

Food rules are the USDA food limits set for WIC program approved foods.

### 5.1 Food Rule

The Food Rule screen is used to add, modify, and delete food rules. The record selector is used to find an existing food rule, the rule name field is used to name a new rule and the maximum monthly allowance is used to enter the USDA maximum allowable amount for that food rule. These rules define the maximum amount of each product a WIC participant can receive based on the USDA maximums or state specific maximum. A food rule can contain more than one food subcategory.

> Food Rules > Food Rule

Food Rule  < 1 of 99 >

Rule Name

Max Full Monthly Allowance   Max 2/3 Monthly Allowance  Max 1/3 Monthly Allowance

Foods		
	Subcategory	Nutritional Equivalent Coefficient
>	04-001 Frozen Juice	0.95833
	04-002 Juice	1.00000

Control	Description	
Food Rule	This is the record selector for food rule records.	
	Type	Record Selector
	Contents	Food rule names
	DB Column	FoodRule.Name
New	The New command button is used to create a new food rule record.	
	Type	Command Button
	Hot Key	Alt + N

Control	Description			
Edit	The Edit command button is used to update a food rule record.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + T		
Delete	The Delete command button is used to delete a food rule record.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + D		
Rule Name	The name of the food rule.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	50		
	<b>Validation</b>	NA		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	FoodRule.Name		
Max Full Monthly Allowance	The maximum full monthly amount of the food product that can be given.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Decimal 9,5		
	<b>Validation</b>	Numeric, Mask of Z9.99999		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	FoodRule.MaxConstraintNr		
Calculate Size	Clicking the Calculate Size command button multiplies the Max Full Monthly Allowance entered by 2/3 and 1/3 and places the products into the Max 2/3 Monthly Allowance and Max 1/3 Monthly Allowance fields respectively for use in proration.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + L		

Control	Description				
Max 2/3 Monthly Allowance	The maximum 2/3 monthly amount of the food product that can be given.				
	<b>Type</b>	Text Box			
	<b>Required</b>	No			
	<b>Length</b>	Decimal 9,5			
	<b>Validation</b>	Numeric, Mask of Z9.99999			
	<b>Display Only</b>	No	<b>Calculated</b>	Yes but can be overridden	
	<b>DB Column</b>	FoodRule.Partial2ConstraintNr			
Max 1/3 Monthly Allowance	The maximum 1/3 monthly amount of the food product that can be given.				
	<b>Type</b>	Text Box			
	<b>Required</b>	No			
	<b>Length</b>	Decimal 9,5			
	<b>Validation</b>	Numeric, Mask of Z9.99999			
	<b>Display Only</b>	No	<b>Calculated</b>	Yes, but can be overridden	
	<b>DB Column</b>	FoodRule.Partial1ConstraintNr			
Add Row	Clicking the Add Row command button causes a new row to be added to the Foods grid.				
	<b>Type</b>	Command Button			
	<b>Hot Key</b>	Alt + A			
Remove Row	Clicking the Remove Row command button causes a row to be removed from the Foods grid.				
	<b>Type</b>	Command Button			
	<b>Hot Key</b>	Alt + R			
Foods	Data grid used to display, add, edit, and delete foods associated with the selected food rule.				
	<b>Type</b>	Data Grid			
	<b>Display</b>	Yes			

Control	Description			
Category / Subcategory	A list box containing all active subcategories in the database.			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes		
	<b>Code ID</b>	Subcategory table lookup Mask of 99-999 xxxxx where 99 is category number 999 is subcategory number Xxxxx is subcategory name		
Nutritional Equivalent Coefficient	The factor that is used to determine the nutritional equivalence of one food to another. This field is used in determining the USDA limits for dairy, formula, juice, and any other food items that have different container options or foods to choose from.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Decimal 9,5		
	<b>Validation</b>	Numeric, Mask of Z9.99999		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	FoodRuleProd.NutritionalEqNr		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this food rule or food records is displayed.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	NA		
	<b>Validation</b>	Mask of 'firstname lastname mm/dd/yyyy'		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	Most recent of FoodRule.ModifyStfpID + FoodRule.ModifyDt or FoodRuleProd.ModifyStfpID + FoodRuleProd.ModifyDt		

Business Rules
<ol style="list-style-type: none"> <li>1. The Calculate Size command button will multiply the entered Max Full Monthly Allowance entered by 2/3 and 1/3 to place into Max 2/3 Monthly Allowance and Max 1/3 Monthly Allowance respectively for use in proration. For example, if the full was 64 ounces, then the 2/3 would be 43 ounces (<math>64/3 * 2 = 42.66667</math>) and the 1/3 would be 21 ounces (<math>64/3 = 21.33333</math>).</li> <li>2. Display an error message if deleting a food rule that has a participant profile attached to it.</li> <li>3. Default Nutritional Equivalent Coefficient to 1.0.</li> <li>4. Sort food in food grid by category / subcategory.</li> </ol>

Developer Notes
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## 5.2 Rule Participant Profiles

The Rule Participant Profiles screen is used to associate the previously defined participant profiles to the food rules.

> *Food Rules > Rule Participant Profiles*

Food Rule Juice Women Special Diet

Available Profiles

Breastfeeding  
 Breastfeeding - BF Full  
 Breastfeeding - BF Full - Special Diet  
 Breastfeeding - Homeless

Add

Remove

Assigned Profiles

Breastfeeding - BF Full - Special Diet

Control	Description	
Food Rule	This is the list box for selecting a food rule record.	
	Type	List Box
	Required	Yes
	DB Column	FoodRule.Name
	Code ID	FoodRule table lookup

Control	Description	
Available Profiles	The available profiles data grid contains all participant profiles that are available for assignment to the food rule.	
	<b>Type</b>	Read-Only Data Grid
	<b>Display</b>	Yes
Assigned Profiles	The assigned profiles data grid displays all participant profiles that are associated to the selected food rule.	
	<b>Type</b>	Read-Only Data Grid
	<b>Display</b>	Yes
Add	Clicking the Add command button moves the selected profile from the Available profiles data grid to the Assigned profiles data grid. When the screen is saved the participant profile is associated with the selected food rule.	
	<b>Type</b>	Command Button
	<b>Hot Key</b>	Alt + A
Remove	Clicking the Remove command button moves the selected profile from the Assigned profiles data grid to the Available profiles data grid. When the screen is saved the participant profile is no longer associated with the selected food rule.	
	<b>Type</b>	Command Button
	<b>Hot Key</b>	Alt + R

<b>Business Rules</b>
<ol style="list-style-type: none"> <li>1. If a participant profile has been placed on the Assigned Profiles data grid, the corresponding participant profiles in the Available Profiles data grid should be grayed out and not selectable.</li> <li>2. Profile names used in the Available Profiles and Assigned Profiles area are a combination of the attributes regarding the profile. The naming convention include:                         <ol style="list-style-type: none"> <li>a. Part Category’s English value (first words)</li> <li>b. Add each other attribute with a ‘ – ‘.</li> <li>c. For Infant’s BF column, add ‘BF None’, ‘BF Partial’ and ‘BF Full’. For Breastfeeding Women’s BF column, add ‘BF Full BF’, ‘BF Part In’, ‘BF Part Out’ and ‘BF No BF’.</li> <li>d. For checked Spec Diet, add ‘Special Diet’</li> <li>e. For checked Multiples, add ‘Multiples’</li> <li>f. If Min Age and Max Age present, add ‘Age x-y’ where x is value from Min Age and y is value from Max Age</li> </ol> </li> </ol>

<b>Developer Notes</b>
1.

## 6 Change Food Rule

The Change Food Rule screen is used to define changes that are automatically applied when a participant reaches a milestone (i.e. be entering into a new profile). The change occurs to the participant’s current package. The type of changes covered includes adding a food item, removing an existing food item and/or changing an existing food item’s quantity.

*Change Food Rule*

**(FI Only)**

Change Rule: Infant Partial BF 6 mo – 11 mo [Navigation: 1 of 99, New, Edit, Delete]

Change Rule Name: Infant Partial BF 6 mo – 11 mo

Arrive at Profile: I BF-Partial 6 mo – 11 mo

Buttons: Add Row, Remove Row

Milestone Food Changes			
	Food Items	Change Type	Quantity
>	32 oz Enfamil LIPIL RTF	Change Qty To	10
	Ounces of Juice	Add Food Item	144
	Ounces of Cereal	Remove Food Item	0

**(EBT Only)**

Change Rule: Infant Partial BF 6 mo – 11 mo [Navigation: 1 of 99, New, Edit, Delete]

Change Rule Name: Infant Partial BF 6 mo – 11 mo

Arrive at Profile: I BF-Partial 6 mo – 11 mo

Buttons: Add Row, Remove Row

Milestone Food Changes			
	Subcategory	Change Type	Quantity
>	21 033 Enfamil LIPIL Powder	Change Qty To	10
	04 002 Juice	Add Food Item	144
	05 001 Cereal	Remove Food Item	0

Control	Description	
Change Food Rule	This is the record selector for change food rule records.	
	Type	Record Selector
	Contents	Change food rule names

Control	Description			
New	The New command button is used to create a new change food rule record.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + N		
Edit	The Edit command button is used to update a change food rule record.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + T		
Delete	The Delete command button is used to delete a change food rule record.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + D		
Change Rule Name	The name of the change food rule.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	50		
	<b>Validation</b>	NA		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ChangeFoodRule.ChangeRuleName		
Arrive at Profile	A list box containing all active participant profiles. The change rule executes when a participant arrives at this profile for an issuance month.			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes		
	<b>Code ID</b>	Participant Profile table lookup		
	<b>DB Column</b>	ChangeFoodRule.PP_ID		
Add Row	Clicking the Add Row command button causes a new row to be added to the Milestone Food Changes grid.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + A		
Remove Row	Clicking the Remove Row command button causes a row to be removed from the Milestone Food Changes grid.			
	<b>Type</b>	Command Button		
	<b>Hot Key</b>	Alt + R		

Control	Description			
Milestone Food Changes	Data grid used to display, add, edit, and delete food changes associated with the selected change food rule.			
	<b>Type</b>	Data Grid		
	<b>Display</b>	Yes		
Food Item (FI) Category / Subcategory (EBT)	A list box containing all active food items.			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes		
	<b>Code ID</b>	ProdContainer table lookup For FI states, ProdContainer.FIDc For EBT states, Mask of 99-999 xxxxx where 99 is category number 999 is subcategory number xxxxx is ProdContainer.FIDc		
<b>DB Column</b>	ChangeFoodRuleProd.PCon_ID			
Change Type	A list box containing the type of automatic changes.			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes		
	<b>Code ID</b>	Change Rule Type This code element is non-editable. The installed values are: Change Qty To Add Food Item Remove Food Item		
	<b>DB Column</b>	ChangeFoodRuleProd.ChangeTypeCd		
Quantity	The quantity associated with the automatic food change.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Integer 3		
	<b>Validation</b>	Mask of ZZ9		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ChangeFoodRuleProd.QuantityNr		

Control	Description			
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this food rule or food records is displayed.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	NA		
	<b>Validation</b>	Mask of 'firstname lastname mm/dd/yyyy'		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	Most recent of ChangeFoodRule.ModifyStfpID + ChangeFoodRule.ModifyDt or ChangeFoodRuleProd.ModifyStfpID + ChangeFoodRuleProd.ModifyDt		

Business Rules
<ol style="list-style-type: none"> <li>1. Display an error if the participant profile has a package switch indicator checked (participants cannot auto-switch and auto-change at the same time).</li> <li>2. Display an error if the participant profile has an existing change food rule. Only one change food rule is allowed per participant profile</li> <li>3. Sort Contents grid by Food Item.</li> <li>4. Quantity defaults to zero on Add Row. Quantity must be greater than 0 for Change Qty To and Add Food Item rows. Quantity must be 0 for Remove Food Item.</li> <li>5. The Arrive At Profile Listbox displays a combination of the attributes regarding the active profiles. The naming convention includes:                         <ol style="list-style-type: none"> <li>a. Part Category's English value (first words)</li> <li>b. Add each other attribute with a ' - '.</li> <li>c. For Infant's BF column, add 'BF None', 'BF Partial' and 'BF Full'. For Breastfeeding Women's BF column, add 'BF Full BF', 'BF Part In', 'BF Part Out' and 'BF No BF'</li> <li>d. For checked Spec Diet, add 'Special Diet'</li> <li>e. For checked Multiples, add 'Multiples'</li> <li>f. If Min Age and Max Age present, add 'Age x-y' where x is value from Min Age and y is value from Max Age</li> </ol> </li> </ol>

Developer Notes
1.

## 7 Model Food Packages

The Model Food Package is used to add, edit, or deactivate a model food package. Model food packages are set up by the state WIC office and are generally the most commonly issued food packages.

### 7.1 Model Food Package

The Model Food Package screen is used to add, edit, or deactivate a model food package. The record selector is used to find an existing model food package, and the name field is used to name a new model food package. For FI states, the number of full package FIs is the number of food instruments printable for a full month when the model food package is printed. For FI States, the number of FIs printed for the 2/3 and 1/3 prorated packages can be designated by entering the appropriate number in the No. of 2/3 Pkg FIs and No. of 1/3 Pkg FIs. For both FI and EBT states, the quantities of the food are also prorated in the grid. Sort Order is used to determine the order in which the model food packages are displayed in the Clinic Services Food Package screen.

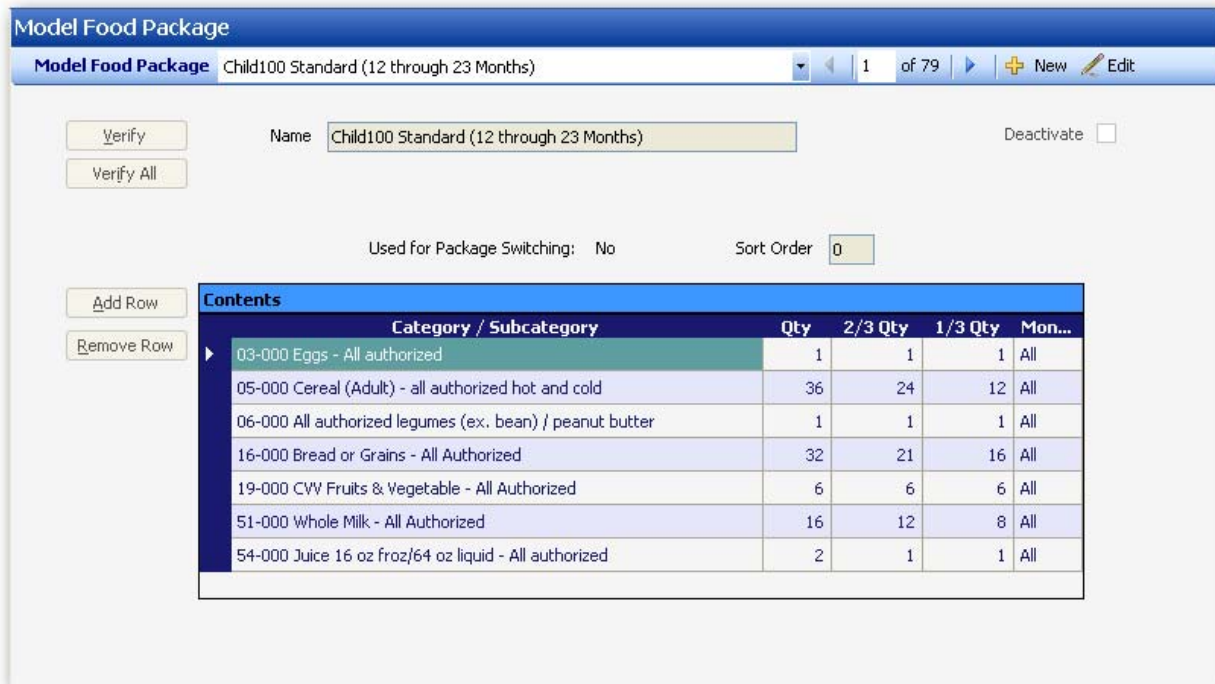
> Model Food Packages > Model Food Package

FI States view

The screenshot shows the 'Model Food Package' interface. At the top, there is a dropdown menu for the package name, currently set to 'Excl BF Woman - Realistic Package', and a record selector showing '1 of 99'. Action buttons for 'New' and 'Edit' are visible. Below this, there are 'Verify' and 'Verify All' buttons on the left, and a 'Name' field containing the same package name. A 'Deactivate' checkbox is on the right. The 'Non-Formula FIs' section contains three input fields: 'Full Package' (3), '2/3 Package' (3), and '1/3 Package' (3). The 'Formula FIs' section contains three input fields: 'Full Package' (0), '2/3 Package' (0), and '1/3 Package' (0). Below these is a 'Used for Package Switching: No' checkbox and a 'Sort Order' input field set to '3'. On the left side, there are 'Add Row' and 'Remove Row' buttons. The 'Contents' table is as follows:

Food Item	Start FI	Qty	2/3 Qty	1/3 Qty	Months
8 Ounce Package Cheese	3	1	1	0	All
Can(s) Beans 16 oz	2	4	4	4	All
Cans 12-oz frozen or 46-oz juice	1	0	3	2	All
Containers 64-oz juice	1	4	0	0	All
Dozen Eggs	1	3	2	1	All
Jar Peanut Butter 18 Ounce	1	1	1	0	All

EBT States view



Control	Description
New	The New command button is used to create a new model food package record.
	<b>Type</b> Command Button
	<b>Hot Key</b> Alt + N
Edit	The Edit command button is used to update a model food package record.
	<b>Type</b> Command Button
	<b>Hot Key</b> Alt + T
Verify	Clicking the Verify command button is used to verify the model food package that is displayed.
	<b>Type</b> Command Button
	<b>Hot Key</b> Alt + V
Verify All	Clicking the Verify All command button is used to verify all the model food packages.
	<b>Type</b> Command Button
	<b>Hot Key</b> Alt + I

Control	Description			
Model Food Package	This is the record selector for the model food package records.			
	Type	Record Selector		
	DB Column	ModelRx.Name + indication when a package has a contract or non-contract formula in it.		
	Contents	Existing model food packages.		
Name	Text box used to name the model food package.			
	Type	Text Box		
	Required	Yes		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	ModelRx.Name		
Deactivate	A checkbox used to indicate that the model food package is deactivated.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	ModelRx.Status		
Non-Formula FIs: Package FIs: Full Package (FI Only)	The default number of non-formula food instruments for the full model food package.			
	Type	Text Box		
	Required	Yes, See business rule 11.a and 12.a		
	Length	Integer 2, Mask of Z9		
	Validation	Numeric, >0		
	Display Only	No	Calculated	No
DB Column	ModelRx.FullChecksNr			
Non-Formula FIs: Package FIs: 2/3 Package (FI Only)	The default number of non-formula food instruments for the 2/3 model food package.			
	Type	Text Box		
	Required	Yes, See business rule 11.a and 12.a		
	Length	Integer 2, Mask of Z9		
	Validation	Numeric, >0		
	Display Only	No	Calculated	Yes, but can be overridden
DB Column	ModelRx.Partial2ChecksNr			

Control	Description			
Non-Formula FIs: Package FIs: 1/3 Package (FI Only)	The default number of non-formula food instruments for the 1/3 model food package.			
	<b>Type</b>	Text Box, >0		
	<b>Required</b>	Yes, See business rule 11.a and 12.a		
	<b>Length</b>	Integer 2, Mask of Z9		
	<b>Validation</b>	Numeric		
	<b>Display Only</b>	No	<b>Calculated</b>	Yes, but can be overridden
	<b>DB Column</b>	ModelRx.Partial1ChecksNr		
Formula FIs: Full Package (FI States with Non-mixed only)	The default number of formula food instruments for the full model food package.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Integer 2		
	<b>Validation</b>	Numeric, >0, Mask of Z9		
	<b>Display Only</b>	No	<b>Calculated</b>	No
	<b>DB Column</b>	ModelRx.FullFormulaChecksNr		
Formula FIs: 2/3 Package (FI States with Non-mixed only)	The default number of formula food instruments for the 2/3 model food package.			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Integer 2		
	<b>Validation</b>	Numeric, >0, Mask of Z9		
	<b>Display Only</b>	No	<b>Calculated</b>	Yes, but can be overridden
	<b>DB Column</b>	ModelRx.Partial2FormulaChecksNr		

Control	Description				
Formula FIs: 1/3 Package (FI States with Non-mixed only)	The default number of formula food instruments for the 1/3 model food package.				
	<b>Type</b>	Text Box			
	<b>Required</b>	Yes			
	<b>Length</b>	Integer 2			
	<b>Validation</b>	Numeric, >0, Mask of Z9			
	<b>Display Only</b>	No	<b>Calculated</b>	Yes, but can be overridden	
	<b>DB Column</b>	ModelRx.Partial1FormulaChecksNr			
Used for Package Switching	This indicates whether this Model Food Package is used in any Participant Profiles as an Auto Switch Package				
	<b>Type</b>	Text Box			
	<b>Required</b>	NA			
	<b>Length</b>	NA			
	<b>Validation</b>	Yes or No			
	<b>Display Only</b>	Yes	<b>Calculated</b>	Yes	
	<b>DB Column</b>	ModRXPartProfile junction record			
Sort Order	This sort order of this Model Food Package that is used on the Clinic Service Food Package screen.				
	<b>Type</b>	Text Box			
	<b>Required</b>	Yes, Default to 0			
	<b>Length</b>	Integer 2, Mask of Z9			
	<b>Validation</b>	Numeric			
	<b>Display Only</b>	No	<b>Calculated</b>	No	
	<b>DB Column</b>	ModelRx.DisplaySeqNr			
Contents	Data grid used to display, add, edit, and delete foods and quantities associated with the selected model food package.				
Food Item (FI Only) Category / Subcategory (EBT Only)	Food items associated with the selected model food package.				
	<b>Type</b>	List Box			
	<b>Required</b>	Yes			
	<b>Length</b>	Depends on value in the system parameter, FI.DescriptionMaxLength (FI) 50 (EBT)			
	<b>Code ID</b>	FI States			

Control	Description				
	Active Containers (Display all ProdContainer.FIDc in the drop-down where ProdContainer.Status = "A") EBT States Active Subcategories (Display all category Product.SubCategoryNr and Product.Name in the drop-down where Product.Status = "A")				
Start FI (FI Only)	In clinic services, when the system distributes the food items from this model package, this indicates which FI to start (relative positioning) the distribution.				
	<b>Type</b>	Text Box			
	<b>Required</b>	Yes			
	<b>Length</b>	Integer 1, Mask of 9			
	<b>Validation</b>	Numeric, >0			
	<b>Display Only</b>	No	<table border="1"> <tr> <td data-bbox="974 785 1203 846"><b>Calculated</b></td> <td data-bbox="1203 785 1421 846">No</td> </tr> </table>	<b>Calculated</b>	No
<b>Calculated</b>	No				
	<b>DB Column</b>	ModProdContainer.StartFINr			
Qty	The specific quantity of the food item for the model food package.				
	<b>Type</b>	Text Box			
	<b>Required</b>	Yes			
	<b>Length</b>	Integer 4, Mask of Z9			
	<b>Validation</b>	Numeric, >0			
	<b>Display Only</b>	No	<table border="1"> <tr> <td data-bbox="974 1161 1203 1222"><b>Calculated</b></td> <td data-bbox="1203 1161 1421 1222">No</td> </tr> </table>	<b>Calculated</b>	No
<b>Calculated</b>	No				
	<b>DB Column</b>	ModProdContainer.FullItemQt			
2/3 Qty	The 2/3 quantity of the food item for the model food package (used for proration).				
	<b>Type</b>	Text Box			
	<b>Required</b>	Yes			
	<b>Length</b>	Integer 4, Mask of Z9			
	<b>Validation</b>	Numeric			
	<b>Display Only</b>	No	<table border="1"> <tr> <td data-bbox="974 1539 1203 1631"><b>Calculated</b></td> <td data-bbox="1203 1539 1421 1631">Yes, but can be overridden</td> </tr> </table>	<b>Calculated</b>	Yes, but can be overridden
<b>Calculated</b>	Yes, but can be overridden				
	<b>DB Column</b>	ModProdContainer.Partial2ItemQt			

Control	Description			
1/3 Qty	The 1/3 quantity of the food item for the model food package (used for proration).			
	<b>Type</b>	Text Box		
	<b>Required</b>	Yes		
	<b>Length</b>	Integer 4, Mask of Z9		
	<b>Validation</b>	Numeric		
	<b>Display Only</b>	No	<b>Calculated</b>	Yes, but can be overridden
	<b>DB Column</b>	ModProdContainer.Partial1ItemQt		
Months	A list box set to determine whether the food item is on odd, even or all months.			
	<b>Type</b>	List Box		
	<b>Required</b>	Yes		
	<b>DB Column</b>	ModProdContainer.OddEvenCd		
	<b>Code ID</b>	OddEven This code element is non-editable. The installed values are: All Odd Even		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this model food package or its food records are displayed.			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	NA		
	<b>Validation</b>	Mask of 'firstname lastname mm/dd/yyyy'		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	Most recent of ModProdContainer.ModifyStfpID + ModProdContainer.ModifyDt or ModelRX.ModifyStfpID + ModelRx.ModifyDt		

<b>Business Rules</b>
1. If a model food package has a non-contract formula in it, the Model Food Package record selector has '(Non-Contract)' appended to it. If no non-contract formula and a model food package has a contract formula in it, the Model Food Package name has '(Contract)' appended to it. This is based on the rebate effective/end dates in

**Business Rules**

comparison to the current date. Formula is defined as the category being marked as Infant Formula or WIC Eligible Medical Food.

**2. Model Food Package Proration Setup Algorithm**

- a. When a number is entered into the No. of Full Pkg FIs and the respective 2/3 and 1/3 fields are blank, divide the number of full package FIs entered by 2/3 and 1/3 to place into the number of 2/3 package FIs and number of 1/3 package FIs respectively for use in proration. During this process, round using standard rounding (.5 and above, round up). For example, if the full package was 4 FIs, then the 2/3 package would be 3 FIs ( $8/3 = 2.67$ ) and the 1/3 package would be 1 FI ( $4/3 = 1.33$ ). The exception is when it is a 1 FI full package, then the 2/3 package and 1/3 package would remain at 1 FI (not 0 per the mathematical calculation).
- b. For EBT states (system parameter System.FoodBenefitDeliveryMethod of "EBT"), the first and second group box of package quantities should be hidden and the Contents StartFI column. The values will default to 1 in the database.
- c. When a number is entered into the Quantity and the respective 2/3 and 1/3 fields are blank, multiply the number of food items entered by food items' Prorate %-ages.2/3 and Prorate %-ages.1/3 to place into the number of 2/3 and number of 1/3 respectively for use in proration. During this process, round using standard rounding (.5 and above, round up). For example, if the full package was 4 FIs, then the 2/3 package would be 3 FIs ( $8/3 = 2.67$ ) and the 1/3 package would be 1 FI ( $4/3 = 1.33$ ). The exception is when it is a 1 FI and the Food Item's Prorate to Zero is not checked, then the 2/3 package and 1/3 package would remain at 1 FI (not 0 per the mathematical calculation).

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3. For EBT states (system parameter System.FoodBenefitDeliveryMethod of "EBT"), the Food Items names will be formatted as 99-999 XXXXX where 99 is the category number, 999 is the subcategory number and XXXXX is the subcategory name.
4. All is the default for Months.
5. Clear and Disable the Start FI column (otherwise default to 1)
  - a. When a food item is from a food category that is marked as CVV.
  - b. For FI states (System.FoodBenefitDeliveryMethod = 'FI') that are not doing Mixed FIs (Food.FormulaMixed FIs = 'No'), when a food item is from a food category marked as Infant Formula or WEMF is selected.
6. The Verify command button runs an algorithm to determine whether or not the selected model food package complies with the maximum full, 2/3 and 1/3 food rules associated with it. The model food package verification also determines whether or not the associated participant profiles are valid in conjunction with the foods that exist on the Contents data grid. If the algorithm determines that the food package is valid a pop-up appears that states the verification is successful. If the food package is not valid all of the violations are listed on the Verification Results screen. The user then has opportunity to correct the food package for verification or to deactivate the food package. An active model food package can be saved with errors, but the food package cannot be issued until the errors are corrected and the food package is verified.
7. The Verify All command button runs an algorithm to determine whether or not all of the model food packages comply with the maximum full, 2/3 and 1/3 food rules associated with them. The model food packages verification also determines whether or not the associated participant profiles are valid in conjunction with the foods that exist on the Contents data grid. If any of the food packages are not valid all of the violations are listed on the Verification Results screen. The user then has opportunity to correct the food package for verification or to deactivate the food package. An active model food package can be saved with errors, but the food package cannot be issued until the errors are corrected and the food package is verified.
8. Food Validation Errors:
  - a. Display an error message if the model contains no food item lines. A model contain at least one food item.
  - b. Display an error message when quantity is zero for a food item's Full, 2/3 and 1/3 columns.
  - c. Display an error message if a model food package is deactivated but is used for package switching.
  - d. Display an error message if deactivating a package that has a participant profile attached to it.
  - e. Display an error message if a food item's issuance amount is not 0 and it is less than the food item's subcategory Issuance Minimum. If the issuance amount is 0, this means that the food item is not wanted at that particular level (full, 2/3 or 1/3).
  - f. Display an error if a food item's issuance amount is not a multiple of the food item's subcategory Issuance Multiplier. If the food item's subcategory Issuance Multiplier is not set (null), this edit is not executed.
  - g. (FI Only) Display an error message if the value entered into the Start FI

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column is greater than any of the values in the Non-Formula FIs group box.

- h. If a food item's category is marked as CVV, display error if the Qty is not equal to the 2/3 Qty and the 1/3 Qty. This ensures that the CVV food items are not manually prorated by the user.

9. Food Verification Algorithm:

- a) Display an error message if a food item in the model is found more than once (duplicate) in the grid. The exception is if the food item is found duplicated with one row having a Month value of 'Odd' and the other row having a Month value of 'Even' and that the food item is marked as "Allow Combine and Average". This indicates a 'combine and average' food situation for verification against maximum food rules.
- b) Display an error message if the model contains a food item (including optional food containers) that is not active.
- c) Edits for Package quantities against number of food items:
  - i. For FI states (System.FoodBenefitDeliveryMethod = 'FI') that are not doing Mixed FIs (Food.FormulaMixed FIs = 'No'), display an error message if the model would create FIs that have no food:
    - i. no non-formula/non-CVV food item has a Quantity that is equal to or greater than the number of Non-Formula FIs: Full Package or has a 2/3 Qty that is equal to or greater than the number of Non-Formula FIs: 2/3 Package or has a 1/3 Qty that is equal to or greater than the number of Non-Formula FIs: 1/3 Package. This is an error because this would imply that the model would create an FI with no non-formula food items. Note: CVV food items are not counted against the number of Non-Formula FI because they are on their own FI.
    - ii. no formula food item has a Quantity that is equal to or greater than the number of Formula FIs: Full Package or has a 2/3 Qty that is equal to or greater than the number of Formula FIs: 2/3 Package or has a 1/3 Qty that is equal to or greater than the number of Formula FIs: 1/3 Package. This is an error because this would imply that the model would create an FI with no formula food items.
    - iii. Gaps may occur with the use of the Start FI feature. For example, Start FI has values of 1 and 3. However, there is no food that ends up on FI 2.
  - ii. For FI states (System.FoodBenefitDeliveryMethod = 'FI') that are doing Mixed FIs (Food.FormulaMixed FIs = 'Yes'), display an error message if no non-CVV food item has a Quantity that is equal to or greater than the number of Package FIs: Full Package or has a 2/3 Qty that is equal to or greater than the number of Package FIs: 2/3 Package or has a 1/3 Qty that is equal to or greater than the number of Package FIs: 1/3 Package. This is an error because this would imply that the model would create an FI with no food items. Note: CVV food items are not counted against the number of Package FI because they are on their own FI.
  - iii. This error will not occur in EBT states (System.FoodBenefitDeliveryMethod = 'EBT') because these values are all set to 1.  
Note: CVV food items are not included in this edit.
- d) Display an error message if no food item has a Quantity that is equal to or greater

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than the No. of Full Pkg FIs or has a 2/3 Qty that is equal to or greater than the No. of 2/3 Pkg FIs or has a 1/3 Qty that is equal to or greater than the No. of 1/3 Pkg FIs. This is an error because this would imply that the model would create an FI with no food items. This error will not occur in EBT states because the No. of Full Pkg FIs is automatically set to 1.

- i. For FI delivery states that do not allow formula to be mixed on FIs with other food items, formula (Infant Formula and WEMF) food items are not included in this edit.
- e) Display an error message if the No. of Full Pkg FIs is greater than 1 and the model has all food items that cannot be split across FIs (Food item has Autosplit set to No). This error will not occur in EBT states because the No. of Full Pkg FIs is automatically set to 1.
- f) Display an error message when the number of food items on any check is greater than the system parameter FI.LinestoPrintOnFIMaxNumber. This error will not occur in EBT states when the system parameter FI.LinestoPrintOnFIMaxNumber should be set to 99.
- g) Display an error message if any food from a food subcategory does not have a food rule.
- h) Display an error message when a food rule has been violated. (i.e. total quantity of the food item is greater than the max amount for the profile.
- i) Display an error message if the model is using the 'combine and average' feature (see BR 9a) and the participant profile is not marked as "Allow C&A".
- j) When a model food package contains only food items from food category's that are marked as Exempt Infant Formula or WEMF and whose participant profile is inclusively within the age of 6 months (Min Age) and 12 months (Max Age) and the infant is 'not breastfeeding' or partial breastfeeding, add to the maximum allowance food rules the amount contained in either the system parameter, Food.InfantExtraOuncesExemptFormulaNoBF or Food.InfantExtraOuncesExemptFormulaPart BF, before verification. The parameter is based on the infant's breastfeeding level in their participant profile.
- k) (FI Only) If the System.FoodBenefitDeliveryMethod system parameter is set to "FI" and the Food.MixedFormulaFIs is set to "No", display an error message for each FI where a food from a food category that is marked as a Formula is found on the same FI with any other food items that have a quantity greater than zero.
- l) (FI Only) If the System.FoodBenefitDeliveryMethod system parameter is set to "FI", display an error message for each FI where a food item has the direct checkbox checked and there are any other food items on the FI that have their direct checkbox unchecked. Food items that are directly shipped must be isolated on their own FI(s).
- m) (FI Only) If the System.FoodBenefitDeliveryMethod system parameter is set to "FI", display an error message for each FI where a food from a food category that is marked as a CVV is found on the same FI with any other food items that have a quantity greater than zero.
- n) (FI Only) If the System.FoodBenefitDeliveryMethod system parameter is set to "FI", display an error message for any FI where a food from a food category that is marked as a CVV is not found on the FI with a quantity of 1 and is the only food item.

10. Sort Contents grid by Food Item.

**Business Rules**

11. For FI states (System.FoodBenefitDeliveryMethod = 'FI') that are doing Mixed FIs (Food.FormulaMixed FIs = 'Yes'), label the first group box of package quantities as 'Package FIs'. The second group box of package quantities should be hidden. The 'Package FIs' tell the system how many FIs to split the food items across.
  - a. If there are any non-CVV food items, display an error if Full, 2/3 or 1/3 quantity is not greater than 0.
12. For FI states (System.FoodBenefitDeliveryMethod = 'FI') that are not doing Mixed FIs (Food.FormulaMixed FIs = 'No'), label the first group box of package quantities as 'Non-formula FIs' and the second group box of package quantities as 'Formula FIs'. The 'Non-Formula FIs' tell the system how many FIs to split the non-formula food items across. The 'Formula FIs' tell the system how many FIs to split the formula food items across.
  - a. If there are any non-CVV non-formula food items, display an error if Non-Formula Full, 2/3 or 1/3 quantity is not greater than 0.
  - b. If there are any formula food items, display an error if Formula Full, 2/3 or 1/3 quantity is not greater than 0.
13. Sort records alphabetically

**Developer Notes**

- 1.

## 7.2 Package Participant Profiles

The Participant Profiles screen is used to associate the model food packages with the participant profiles previously set up in the system. These associations are what provide validation when issuing a food package to a participant in the Clinic Services module of the system.

> *Model Food Packages* > *Package Participant Profiles*

Control	Description	
Model Food Package	The active model food packages for which participant profiles are associated.	
	<b>Type</b>	List Box
	<b>Required</b>	Yes
	<b>DB Column</b>	ModelRx.Name
	<b>Code ID</b>	Model Food Package table lookup
Available Profiles	The available profiles data grid contains active participant profiles.	
	<b>Type</b>	Read-Only Data Grid
	<b>Display</b>	Yes
Assigned Profiles	The assigned profiles data grid displays all participant profiles that are associated with the selected model food package.	
	<b>Type</b>	Read-Only Data Grid
	<b>Display</b>	Yes

Control	Description	
Add	Clicking the Add command button moves the selected profile from the available profiles data grid to the assigned profiles data grid. When the screen is saved the participant profile is associated with the selected model food package.	
	<b>Type</b>	Command Button
	<b>Hot Key</b>	Alt + A
Remove	Clicking the Remove command button moves the selected profile from the assigned profiles data grid to the available profiles data grid. When the screen is saved the participant profile is no longer associated with the selected model food package.	
	<b>Type</b>	Command Button
	<b>Hot Key</b>	Alt + R

Business Rules
<ol style="list-style-type: none"> <li>1. If a participant profile has been placed on the Assigned Profiles data grid, the corresponding participant profiles in the Available Profiles data grid should be grayed out and not selectable.</li> <li>2. If an assigned profile uses the model food package for auto-switching, append (Auto Switch) to the name.</li> <li>3. Do not allow a profile that is marked as Auto Switch to be removed from the Assigned Profile list. This must be done using the Participant Profile screen.</li> <li>4. Profile names used in the Available Profiles and Assigned Profiles area are a combination of the attributes regarding the profile. The naming convention include:                         <ol style="list-style-type: none"> <li>a. Part Category's English value (first words)</li> <li>b. Add each other attribute with a ' - '.</li> <li>c. For Infant's BF column, add 'BF None', 'BF Partial' and 'BF Full'. For Breastfeeding Women's BF column, add 'BF Full BF', 'BF Part In', 'BF Part Out' and 'BF No BF'</li> <li>d. For checked Spec Diet, add 'Special Diet'</li> <li>e. For checked Multiples, add 'Multiples'</li> <li>f. If Min Age and Max Age are present, add 'Age x-y' where x is value from Min Age and y is value from Max Age.</li> </ol> </li> </ol>

Developer Notes
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## 8 Verification Results

The Verification Results screen contains a text box used to display all of the verification errors for the model food packages. The errors are listed here upon clicking the Verify or Verify All button. An active model food package can be saved, but the food package cannot be issued until the errors are corrected and the food package is verified.

Messages are grouped according to Model Food Packages and Participant Profile (associated with Model Food Package). The format is:

The Format for the verification messages is:

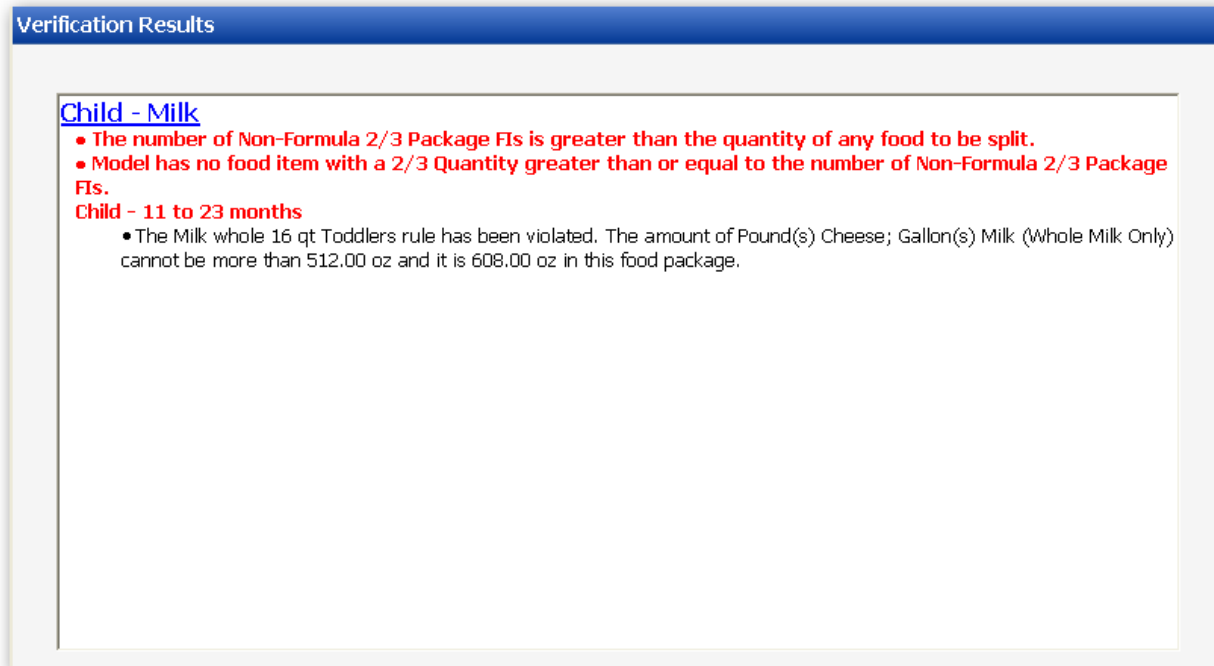
<model food package name link> (Blue)

Error Message – if related only to package (Bulletered red)

<participant profile> (Non-bullet red)

Error Message – if related to the participant profile (Bullet black)

> *Verification Results*



The screenshot shows a window titled "Verification Results" with a blue header. Inside, there is a section for "Child - Milk" with two red bullet points: "The number of Non-Formula 2/3 Package FIs is greater than the quantity of any food to be split." and "Model has no food item with a 2/3 Quantity greater than or equal to the number of Non-Formula 2/3 Package FIs." Below this, a sub-section "Child - 11 to 23 months" contains a black bullet point: "The Milk whole 16 qt Toddlers rule has been violated. The amount of Pound(s) Cheese; Gallon(s) Milk (Whole Milk Only) cannot be more than 512.00 oz and it is 608.00 oz in this food package."

Control	Description			
	A Text box used to display all rule violations for the selected model food package(s).			
	<b>Type</b>	Text Box		
	<b>Required</b>	No		
	<b>Length</b>	Full Panel		
	<b>Validation</b>	NA		
	<b>Display Only</b>	Yes	<b>Calculated</b>	No
	<b>DB Column</b>	Not Stored		

Business Rules
<ol style="list-style-type: none"> <li>1. Messages will be grouped according to the model food package.</li> <li>2. Model Food Package Name is a link that when clicked will place the user back to the record on the Model Food Package screen.</li> <li>3. Verification errors that are shown directly below the model food package are related to the setup of the package.</li> <li>4. Verification errors that are shown directly below the participant profile are related to the profile associated with model food package.</li> <li>5. The error messages "Model has one or more food items assigned more than once." and "Model contains a food item or an optional container that is inactive." have a link to the food item. The link when clicked will place the user on the food item on the Container Details screen. Note: a save request for the unverified model food package will likely occur.</li> </ol>

Developer Notes
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