Mountain Plains States Consortium
WIC System Project

DETAILED FUNCTIONAL DESIGN DOCUMENT

OP 1 OPERATIONS STAFF FUNCTION SCREENS

Presented to:

Revision Date: January 7, 2011

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CO Contract #WIC0601052
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Document Revisions

Revision Date	Updated By	Requested By	Description of Revision

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1 Intrastate Dual Participation

The screen allows the user to review the on-going results of the intrastate dual participation matching batch process. This screen allows the user to capture the information on how each match pair was resolved. A match pair is kept for historical purposes and so the system knows previous matches, preventing the same match from being flagged again.

> Intrastate Dual Participation

Name #1	Clinic	Person	Name #2	Clinic	Person	Match Found	Resolved	Reason	Comment	Update By
Abernathy, Timothy	4-12	5445	Abernathy, Tim	4-12	7839	01/05/2007	☑	Other	Twin - mistype	slong
Marker, Jake	4-2	3638	Marker, Jacob	4-3	84944	01/05/2007	☐			batchprocess
Rickenhouse, Valerie	5-1	45789	Rickenhouse, Vickie	4-1	57283	02/05/2007	☑	Fraud		ksmith

Control	Description	
Get Data	Clicking the Get Data command button pulls the data from the database based on the filtering and view selections.	
	Type	Command Button
	Hot Key	Alt + G
Print	Clicking the Print command button prints the Intrastate Dual Participation Listing using the filtering and view selections.	
	Type	Command Button
	Hot Key	Alt + P
Filter By Local Agency	Local Agency names that can be used to filter the match record grid.	
	Type	List Box
	Required	No, Mask of Z9 XXXXXX
	DB Column	Not Stored
	Code ID	LocalAgency table lookup
Filter By Clinic	Clinic names that can be used to filter the match record grid.	
	Type	List Box
	Required	No, Mask of Z9 XXXXXX
	DB Column	Not Stored
	Code ID	Clinic table look up

<table>
<tr><th>Control</th><th colspan="4">Description</th></tr>
<tr><td rowspan="4">View – Resolved</td><td colspan="4">Selecting the Resolved radio button allows the user to view only the resolved match records in the grid.</td></tr>
<tr><td>Type</td><td colspan="3">Radio Button</td></tr>
<tr><td>Required</td><td colspan="3">No</td></tr>
<tr><td>DB Column</td><td colspan="3">NA</td></tr>
<tr><td rowspan="4">View – Unresolved</td><td colspan="4">Selecting the Unresolved radio button allows the user to view only the unresolved match records in the grid.</td></tr>
<tr><td>Type</td><td colspan="3">Radio Button</td></tr>
<tr><td>Required</td><td colspan="3">No</td></tr>
<tr><td>DB Column</td><td colspan="3">NA</td></tr>
<tr><td rowspan="2">Intrastate Dual Participation Records</td><td colspan="4">The data grid contains the intrastate dual participation match records that were generated from the monthly batch process.</td></tr>
<tr><td>Type</td><td colspan="3">Data Grid</td></tr>
<tr><td rowspan="7">Name #1</td><td colspan="4">This is the participant’s name that is part of the match set. This participant’s person ID will be a lower number than the person ID of its counterpart in the match set.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">NA, Initial Display of 20</td></tr>
<tr><td>Validation</td><td colspan="3">Mask of Last Name, First Name</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">DualParticipation.FMem1_ID</td></tr>
<tr><td rowspan="7">Clinic</td><td colspan="4">This is clinic of the participant displayed in Name #1.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">NA</td></tr>
<tr><td>Validation</td><td colspan="3">Mask of Z9-ZZ9</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">Participant LA + Participant Clinic</td></tr>
</table>

<table>
<tr><th>Control</th><th colspan="4">Description</th></tr>
<tr><td rowspan="7">Person</td><td colspan="4">This is person ID of the participant displayed in Name #1.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">9</td></tr>
<tr><td>Validation</td><td colspan="3">NA</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">DualParticipation.FMem1_ID</td></tr>
<tr><td rowspan="7">Name #2</td><td colspan="4">This is the other participant’s name that is part of the match set. This participant’s person ID will be a higher number than the person ID of its counterpart in the match set.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">NA, Initial Display of 20</td></tr>
<tr><td>Validation</td><td colspan="3">Mask of Last Name, First Name</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">DualParticipation.FMem2_ID</td></tr>
<tr><td rowspan="7">Clinic</td><td colspan="4">This is clinic of the participant displayed in Name #2.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">NA</td></tr>
<tr><td>Validation</td><td colspan="3">Mask of Z9-ZZ9</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">Participant LA + Participant Clinic</td></tr>
<tr><td rowspan="7">Person</td><td colspan="4">This is person ID of the participant displayed in Name #2.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">9</td></tr>
<tr><td>Validation</td><td colspan="3">NA</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">DualParticipation.FMem2_ID</td></tr>
</table>

<table>
<tr><th>Control</th><th colspan="4">Description</th></tr>
<tr><td rowspan="7">Match Found</td><td colspan="4">This is the date that the batch process identified the match.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">NA</td></tr>
<tr><td>Validation</td><td colspan="3">Mask of mm/dd/yyyy</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">DualParticipation.MatchDt</td></tr>
<tr><td rowspan="4">Resolved</td><td colspan="4">This checkbox indicates whether a match record has been resolved or remains unresolved.</td></tr>
<tr><td>Type</td><td colspan="3">Check Box</td></tr>
<tr><td>Display Only</td><td>No</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">DualParticipation.ResolvedIn</td></tr>
<tr><td rowspan="5">Reason</td><td colspan="4">This is the resolution reason.</td></tr>
<tr><td>Type</td><td colspan="3">List Box</td></tr>
<tr><td>Required</td><td colspan="3">No, Initial Display of 10</td></tr>
<tr><td>DB Column</td><td colspan="3">DualParticipation.ReasonCd</td></tr>
<tr><td>Code ID</td><td colspan="3">Dual Part Resolution</td></tr>
<tr><td rowspan="7">Comment</td><td colspan="4">This is for any comment about the match record</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">No</td></tr>
<tr><td>Length</td><td colspan="3">100, Initial Display of 30</td></tr>
<tr><td>Validation</td><td colspan="3">NA</td></tr>
<tr><td>Display Only</td><td>No</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">DualParticipation.Comment</td></tr>
<tr><td rowspan="7">Update By</td><td colspan="4">This is the user ID of the last user who modified this match record.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">No, Initial Display of 20</td></tr>
<tr><td>Length</td><td colspan="3">NA</td></tr>
<tr><td>Validation</td><td colspan="3">NA</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">DualParticipation.ModifyStfpID</td></tr>
</table>

Business Rules
1. The Filter By controls retrieve records based on values in either the Name #1 Clinic column or the Name #2 Clinic Column. 2. Default the View radio button choice to Unresolved. 3. Sort the Match Records grid by the last name in the Name #1 column. 4. Display an error message if a reason is selected and the Resolved checkbox is not checked. 5. For Resolved view, limit the grid records based on match date being within the current date minus the value found in the system parameter, Operations.IntrastateDualPartViewLimit. 6. Any records whose match was found over 2 years ago will not be returned. This will help prevent selecting a set of records that causes an unacceptable response time or time out. 7. When the View is Resolved, the Get Data button will not be enabled until a LA and Clinic are selected. This will help prevent selecting a set of records that causes an unacceptable response time or time out.

Developer Notes
1.

1.1 Intrastate Dual Participation Listing (Static)

The Intrastate Dual Participation Listing is sent to the user's default printer when the user clicks Print button in the Intrastate Dual Participation screen. The match sets that are printed are based on the filtering and view selections of the screen.

1.1.1 Language: English

The Intrastate Dual Participation Listing is printed in English only.

1.1.2 Intrastate Dual Participation Listing Mockup

Intrastate Dual Participation Listing
2/24/2010

Name #1 / Name #2	Clinic	Family ID	Person ID	Sex	DOB	Status	Match Date	Resolved	Reason
Abernathy, Timothy	4-12	37374	5445	Male	5/12/2006	Terminated	1/5/2007	Yes	Other
Abernathy, Tim	4-12	32435	7839	Male	5/12/2006	Active			
Marker, Jake	4-2	38572	3638	Male	4/3/2007	Ineligible	1/5/2007	No	
Marker, Jacob	4-3	234854	84944	Male	4/3/2007	Active			
Rickenhouse, Valerie	5-1	23493	45789	Female	12/11/2005	Active	2/5/2007	Yes	Fraud
Rickenhouse, Vickie	4-1	32349	57283	Female	12/11/2005	Active			

2 Outreach Log

This screen is used as a tracking log of the outreach events. Each record represents an outreach event. Future planned events can be entered which automatically set an alert for a continual reminder. After updating the event with actual data about the event, it becomes a historical event.

> Outreach Log

	Date	Org Name	Activity Type	Description	Material Type	Matr Qnty	Cost	Hours
>	7/8/2007	Fargo Helper	Publicity	Plan to distribute pamphlets	Pamphlets	400		
	10/15/2006	Fargo Helper	Info Session	Discussed Benefits			$220.25	14.5
	7/18/2006	Fargo Helper	Publicity	Ad Fair	Pamphlets	140	$42.86	6

<table>
<tr><th>Control</th><th colspan="2">Description</th></tr>
<tr><td rowspan="5">Local Agency/Clinic</td><td colspan="2">This is the local agency and clinic ID of the outreach event log. It contains any clinics to which the user has access.</td></tr>
<tr><td>Type</td><td>List Box</td></tr>
<tr><td>Required</td><td>Yes</td></tr>
<tr><td>DB Column</td><td>Clinic.FFLocalAgencyID +
Clinic.FFClinicID +
Clinic.Name</td></tr>
<tr><td>Code ID</td><td>Clinic table lookup</td></tr>
</table>

<table>
<tr><th>Control</th><th colspan="4">Description</th></tr>
<tr><td rowspan="5">Filter By Organization Name</td><td colspan="4">Outreach organization names available to the clinic.</td></tr>
<tr><td>Type</td><td colspan="3">List Box</td></tr>
<tr><td>Required</td><td colspan="3">No</td></tr>
<tr><td>DB Column</td><td colspan="3">Not Stored</td></tr>
<tr><td>Code ID</td><td colspan="3">Organization table lookup</td></tr>
<tr><td rowspan="7"><no label></td><td colspan="4">Outreach organization contact and address information. The following lines of information are displayed (if present):
Contact Person
Business Phone Number with extension (If present)
Address Line 1
Address Line 2
Suite
City, State Abbreviation and Zip</td></tr>
<tr><td>Type</td><td colspan="3">Multiple lines of text</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">NA</td></tr>
<tr><td>Validation</td><td colspan="3">NA</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">NA</td></tr>
<tr><td rowspan="3">Add Row</td><td colspan="4">Clicking the Add Row command button creates a new row in the data grid allowing the user to enter a new outreach event record.</td></tr>
<tr><td>Type</td><td colspan="3">Command Button</td></tr>
<tr><td>Hot Key</td><td colspan="3">Alt + A</td></tr>
<tr><td rowspan="3">Remove Row</td><td colspan="4">Clicking the Remove Row command button removes the selected row from the data grid.</td></tr>
<tr><td>Type</td><td colspan="3">Command Button</td></tr>
<tr><td>Hot Key</td><td colspan="3">Alt + R</td></tr>
<tr><td rowspan="2">Activity or Event</td><td colspan="4">The data grid is used to track outreach activities or events.</td></tr>
<tr><td>Type</td><td colspan="3">Data Grid</td></tr>
</table>

Control	Description			
Date	Date associated with the outreach event. For future events, this is the expected date of the event. An alert displays in the Operations alert area until the date is passed. When an event occurs, the event should be updated (i.e. actual date, actual cost and actual hours).			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	**Calculated**	No
	DB Column	OutreachEvent.EventDt		
Org Name	This is the organization's name that is associated with the event.			
	Type	List Box		
	Required	Yes, Display length of 20		
	Display Only	No		
	DB Column	OutreachEvent.Org_ID		
	Code ID	Organization table lookup		
Activity Type	This is the type (or classification) of the event. These values are set by the state.			
	Type	Box		
	Required	Yes, Display length of 15		
	DB Column	OutreachEvent.EventTypeCd		
	Code ID	Outreach Event Type		
Description	This is a short description of the event. Notes or comments may also be made here.			
	Type	Text Box		
	Required	No		
	Length	100, Display length of 30		
	Validation	NA		
	Display Only	No	**Calculated**	No
	DB Column	OutreachEvent.Description		
Material Type	This is the material type distributed or used at the event. These values are set by the state.			
	Type	List Box		
	Required	No, Display length of 15		
	DB Column	OutreachEvent.EventMaterialCd		
	Code ID	Outreach Material Type		

Control	Description			
Matr Qnty	This is the quantity of the material type that was distributed or used at the event. This information is helpful as a historical reference for future recurring planning purposes.			
	Type	Text Box		
	Required	No		
	Length	Integer 5		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	**Calculated**	No
	DB Column	OutreachEvent.MaterialQty		
Cost	This is the total cost associated with the event.			
	Type	Text Box		
	Required	No		
	Length	Decimal 6,2		
	Validation	Numeric, Mask of $Z,ZZ9.99, Zero allowed		
	Display Only	No	**Calculated**	No
	DB Column	OutreachEvent.EventCostAmt		
Hours	This is the total WIC staff effort recorded as hours expended associated with the event.			
	Type	Text Box		
	Required	No		
	Length	Decimal 4,2		
	Validation	Numeric, Mask of Z9.99		
	Display Only	No	**Calculated**	No
	DB Column	OutreachEvent.Hours		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the any activity or event record according to the filtering are displayed.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of 'firstname lastname mm/dd/yyyy'		
	Display Only	Yes	**Calculated**	No
	DB Column	OutreachEvent.ModifyStfpID + OutreachEvent.ModifyDt		

Business Rules
1. Organizations drop-down contains only the organizations that are associated with the Clinic and are of an Organization Designation – Use By WIC of “Outreach” or “Outreach and Refers To”. These designations are set in the SA 2 Clinic Services Screen (system admin). 2. When a new activity/event row is added, default to current date and copy the activity type, org name, description, material type, and material quantity from previous row. 3. Alert is produced in Operations alert area for any outreach activity/event that has a future date (greater than current date). 4. The Organization information will only appear if the Filter By Organization Name has a value. a. If the business phone extension is present, place a literal “x” before it b. If the Suite has a value, place the literal “Suite” before it 5. Sort Activity or Event grid rows by date (most recent to oldest)

Developer Notes
1.

3 Staff

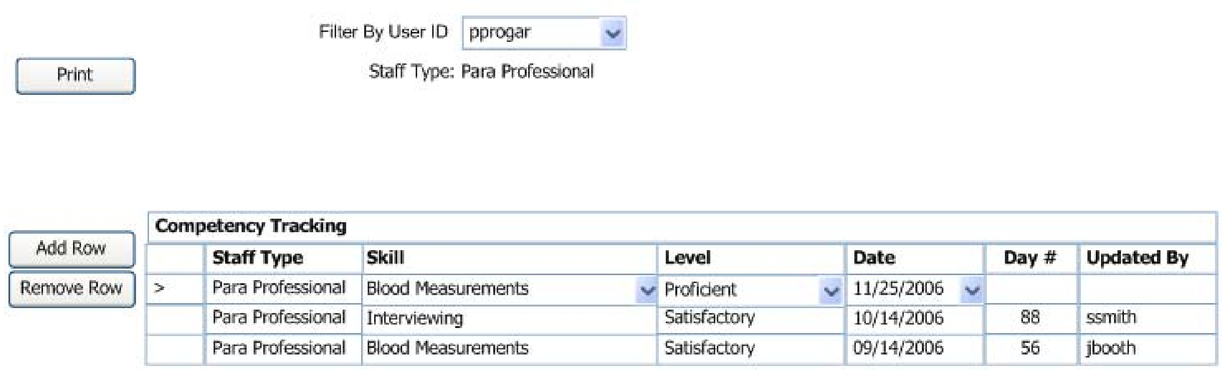
This area contains functionality related to staff administration or management. The functions in this area include:

- Tracking of Staff Competencies
- Tracking of Staff Training
- Time Study Entry
- Tracking of Non-Scheduled Activities

3.1 Staff Competency

This screen contains competency data related to the users defined in the system. Full access to this function is controlled by a user role in the security module. These users are able to access any staff within the clinics for which they are defined. All users have display access to their individual competency data.

> Staff > Staff Competency



<table>
<tr><th>Control</th><th colspan="2">Description</th></tr>
<tr><td rowspan="3">Print</td><td colspan="2">The Print command button is used to output a listing of the user’s competency tracking data.</td></tr>
<tr><td>Type</td><td>Command Button</td></tr>
<tr><td>Hot Key</td><td>Alt + P</td></tr>
<tr><td rowspan="5">Filter By User ID</td><td colspan="2">This is a filter of values containing the user ID of the person who the competency data is about.</td></tr>
<tr><td>Type</td><td>List Box</td></tr>
<tr><td>Required</td><td>Yes</td></tr>
<tr><td>DB Column</td><td>StaffPerson.UserID</td></tr>
<tr><td>Code ID</td><td>StaffPerson table lookup</td></tr>
</table>

<table>
<tr><th>Control</th><th colspan="4">Description</th></tr>
<tr><td rowspan="8">Staff Type</td><td colspan="4">This is the type (or classification) of the user.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">NA</td></tr>
<tr><td>Validation</td><td colspan="3">NA</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">StaffPerson.StaffTypeCd</td></tr>
<tr><td colspan="4"></td></tr>
<tr><td rowspan="3">Add Row</td><td colspan="4">Clicking the Add Row command button creates a new row in the data grid allowing the user to enter a new competency tracking record.</td></tr>
<tr><td>Type</td><td colspan="3">Command Button</td></tr>
<tr><td>Hot Key</td><td colspan="3">Alt + A</td></tr>
<tr><td rowspan="3">Remove Row</td><td colspan="4">Clicking the Remove Row command button removes the selected row from the data grid.</td></tr>
<tr><td>Type</td><td colspan="3">Command Button</td></tr>
<tr><td>Hot Key</td><td colspan="3">Alt + R</td></tr>
<tr><td rowspan="2">Competency Tracking</td><td colspan="4">The data grid is used to track competency.</td></tr>
<tr><td>Type</td><td colspan="3">Data Grid</td></tr>
<tr><td rowspan="7">Competency Tracking – Staff Type</td><td colspan="4">This is the staff type associated with the tracked competency.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">20</td></tr>
<tr><td>Validation</td><td colspan="3">NA</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">NA</td></tr>
<tr><td rowspan="5">Competency Tracking - Skill</td><td colspan="4">This is the skill of the tracked competency.</td></tr>
<tr><td>Type</td><td colspan="3">List Box</td></tr>
<tr><td>Required</td><td colspan="3">Yes, Initial Display length of 20</td></tr>
<tr><td>DB Column</td><td colspan="3">StaffCompetency.Competency_ID</td></tr>
<tr><td>Code ID</td><td colspan="3">Competency table lookup</td></tr>
</table>

<table>
<tr><th>Control</th><th colspan="4">Description</th></tr>
<tr><td rowspan="5">Competency Tracking - Level</td><td colspan="4">This is the level of the tracked competency.</td></tr>
<tr><td>Type</td><td colspan="3">List Box</td></tr>
<tr><td>Required</td><td colspan="3">Yes Initial display length of 15</td></tr>
<tr><td>DB Column</td><td colspan="3">StaffCompetency.CompetencyLevelCd</td></tr>
<tr><td>Code ID</td><td colspan="3">Competency Level</td></tr>
<tr><td rowspan="5">Competency Tracking - Date</td><td colspan="4">Date associated with the tracked competency.</td></tr>
<tr><td>Type</td><td colspan="3">Date Picker</td></tr>
<tr><td>Required</td><td colspan="3">Yes</td></tr>
<tr><td>Display Only</td><td>No</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">StaffCompetency.CompetencyTrackingDt</td></tr>
<tr><td rowspan="7">Competency Tracking - Day #</td><td colspan="4">This is the number of days on the job until they attained this level of competency.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">No</td></tr>
<tr><td>Length</td><td colspan="3">Integer 4</td></tr>
<tr><td>Validation</td><td colspan="3">Numeric</td></tr>
<tr><td>Display Only</td><td>No</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">StaffCompetency.DayNr</td></tr>
<tr><td rowspan="7">Competency Tracking - Update By</td><td colspan="4">This is the user ID of the user who updated the tracked competency.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">20</td></tr>
<tr><td>Validation</td><td colspan="3">NA</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>No</td></tr>
<tr><td>DB Column</td><td colspan="3">StaffCompetency.ModifyStfpID</td></tr>
</table>

Business Rules
1. User ID defaults to the logged on user. 2. Every user will have display and print access to their tracking (i.e. user ID). 3. Security access must allow clinic supervisors to be defined with full (display, modify and print) access to all users in their domain (i.e. clinic). For this, the user ID list box contains an alphabetized listing of these users. A user is given clinic supervisor access to the Staff Competency panel if they are assigned a security role for the Operations functional area that includes the Staff Competency – Clinic Supervisor task with User

Business Rules
Exec Level equal to a value other than None. 4. On an Add Row, the Competency Tracking - Staff Type is populated based on what the current staff type is of the user. 5. Rows where Competency Tracking - Staff Type does not equal the current staff type of the user can not be edited or removed. 6. Sort Competency Tracking by Date (most recent to oldest).

Developer Notes
1. Competency tracking grid should take full advantage of the screen real estate. 2. The lookup to the competency table has to be filtered by StaffTypeCd.

3.1.1 Staff Competency Listing (Dynamic)

The Staff Competency Listing is sent to the user's default printer when the user clicks on the Print button in the Staff Competency screen.

3.1.1.1 Language: English

The Staff Competency Listing is printed in English only.

3.1.1.2 Staff Competency Listing Mockup

WIC Staff Competency Listing for John Doe
Staff Type: Para Professional
March 2, 2007

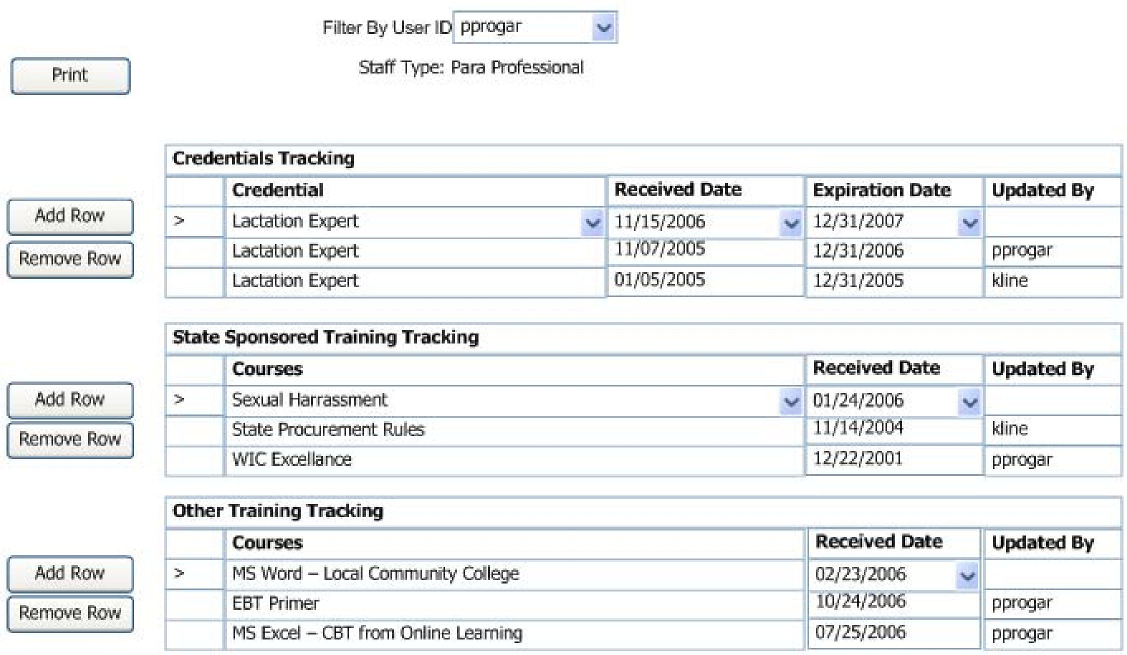
Staff Type	Skill	Level	Date	Day #	Updated By
Para Professional	Blood Measurements	Proficient	11/25/2006		ssmith
Para Professional	Interviewing	Satisfactory	10/14/2006	88	ssmith
Para Professional	Blood Measurements	Satisfactory	9/14/2006	56	jbooth

Business Rules
1. The date listed in the output is the run date of the report.

3.2 Staff Training

This screen contains training and other educational data related to the users defined in the system. This tracking assumes that a user has completed the item. Full access to this function is controlled by a user role in the security module. These users are able to access any staff within the clinics for which they are defined. All users have full access to their individual training data. This allows this data to be employee self-serviced.

> Staff > Staff Training


Filter By User ID pprogar

Print

Staff Type: Para Professional

Add Row
Remove Row

Credentials Tracking				
	Credential	Received Date	Expiration Date	Updated By
>	Lactation Expert	11/15/2006	12/31/2007	
	Lactation Expert	11/07/2005	12/31/2006	pprogar
	Lactation Expert	01/05/2005	12/31/2005	kline

Add Row
Remove Row

State Sponsored Training Tracking			
	Courses	Received Date	Updated By
>	Sexual Harrassment	01/24/2006	
	State Procurement Rules	11/14/2004	kline
	WIC Excellance	12/22/2001	pprogar

Add Row
Remove Row

Other Training Tracking			
	Courses	Received Date	Updated By
>	MS Word – Local Community College	02/23/2006	
	EBT Primer	10/24/2006	pprogar
	MS Excel – CBT from Online Learning	07/25/2006	pprogar

<table>
<tr><th>Control</th><th colspan="2">Description</th></tr>
<tr><td rowspan="3">Print</td><td colspan="2">The Print command button is used to output a listing of the user’s training and education tracking data.</td></tr>
<tr><td>Type</td><td>Command Button</td></tr>
<tr><td>Hot Key</td><td>Alt + P</td></tr>
<tr><td rowspan="5">Filter By User ID</td><td colspan="2">This is a filter of values containing the user ID of the person whose training and education data is being shown.</td></tr>
<tr><td>Type</td><td>List Box</td></tr>
<tr><td>Required</td><td>Yes</td></tr>
<tr><td>DB Column</td><td>StaffStateTraining.Stfp_ID or
StaffNonStateTraining.Stfp_ID or
StaffCredential.Stfp_ID</td></tr>
<tr><td>Code ID</td><td>StaffPerson table lookup</td></tr>
</table>

ciber

Control	Description			
Staff Type	This is the type (or classification) of the user.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	**Calculated**	No
	DB Column	StaffPerson.StaffTypeCd		
Add Row	Clicking the Add Row command button creates a new row in the data grid allowing the user to enter a new credentials tracking record.			
	Type	Command Button		
	Hot Key	None		
Remove Row	Clicking the Remove Row command button removes the selected credentials tracking row from the data grid.			
	Type	Command Button		
	Hot Key	None		
Credentials Tracking	The data grid is used to track the user's formal credentials.			
	Type	Data Grid		
Credentials Tracking – Credential	This is the tracked credential.			
	Type	List Box		
	Required	Yes		
	DB Column	StaffCredential.CredentialCd		
	Code ID	Credential		
Credentials Tracking - Received Date	Received date associated with the tracked credential.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	**Calculated**	No
	DB Column	StaffCredential.ReceivedDt		

Control	Description			
Credentials Tracking - Expiration Date	Expiration date associated with the tracked credential.			
	Type	Date Picker		
	Required	No		
	Display Only	No	**Calculated**	No
	DB Column	StaffCredential.ExpirationDt		
Credentials Tracking - Updated By	This is the user ID of the user who updated the tracked credential.			
	Type	Text Box		
	Required	NA		
	Length	20		
	Validation	NA		
	Display Only	Yes	**Calculated**	No
	DB Column	NA		
Add Row	Clicking the Add Row command button creates a new row in the data grid allowing the user to enter a new state sponsored training tracking record.			
	Type	Command Button		
	Hot Key	None		
Remove Row	Clicking the Remove Row command button removes the selected state sponsored training tracking row from the data grid.			
	Type	Command Button		
	Hot Key	None		
State Sponsored Training Tracking	The data grid is used to track the user’s state sponsored training.			
	Type	Data Grid		
State Sponsored Training Tracking - Courses	This is the course name of the tracked state sponsored training.			
	Type	List Box		
	Required	Yes		
	DB Column	StaffStateTraining.TrainingCourseCd		
	Code ID	Training Course		

Control	Description			
State Sponsored Training Tracking - Received Date	Date associated with the tracked state sponsored training.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	**Calculated**	No
	DB Column	StaffStateTraining.TrainingDt		
State Sponsored Training Tracking - Updated By	This is the user ID of the user who updated the tracked state sponsored training.			
	Type	Text Box		
	Required	NA		
	Length	20		
	Validation	NA		
	Display Only	Yes	**Calculated**	No
	DB Column	NA		
Add Row	Clicking the Add Row command button creates a new row in the data grid allowing the user to enter any other training tracking record.			
	Type	Command Button		
	Hot Key	None		
Remove Row	Clicking the Remove Row command button removes the selected other training tracking row from the data grid.			
	Type	Command Button		
	Hot Key	None		
Other Training Tracking	The data grid is used to track the user's "other" training.			
	Type	Data Grid		
Other Training Tracking - Courses	This is the name of the course of the tracked "other" training.			
	Type	Text Box		
	Required	Yes		
	Length	50		
	Validation	NA		
	Display Only	No	**Calculated**	No
	DB Column	StaffNonStateTraining.Description		

Control	Description			
Other Training Tracking - Received Date	Date associated with the tracked other training.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	**Calculated**	No
	DB Column	StaffNonStateTraining.TrainingDt		
Other Training Tracking - Updated By	This is the user ID of the user who updated the tracked other training.			
	Type	Text Box		
	Required	NA		
	Length	20		
	Validation	NA		
	Display Only	Yes	**Calculated**	No
	DB Column	NA		

Business Rules
1. User ID defaults to the logged on user.
2. Every user will have full (display, modify and print) access to their tracking (i.e. user ID).
3. Security access must allow clinic supervisors to be defined with full (display, modify and print) access to all users in their domain (i.e. clinic). For this, the user ID list box contains an alphabetized listing of these users. A user is given clinic supervisor access to the Staff Training panel if they are assigned a security role for the Operations functional area that includes the Staff Training – Clinic Supervisor task with User Exec Level equal to a value other than None.
4. Credential Expiration Date must be greater than the Received Date.
5. Sort Credentials Tracking by Credentials and Received Date (most recent to oldest).
6. Sort State Sponsored Tracking by Received Date (most recent to oldest).
7. Sort Other Training Tracking by Received Date (most recent to oldest).

Developer Notes
1. Balance all grids to take full advantage of the screen real estate.

3.2.1 Staff Training Listing (Dynamic)

The Staff Training Listing is sent to the user's default printer when the user clicks Print button in the Staff Training screen.

3.2.1.1 Language: English

The Staff Training Listing is printed in English only.

3.2.1.2 Staff Training Listing Mockup

WIC Staff Training Listing for John Doe
Staff Type: Para Professional
March 2, 2007

Credentials History

Credential	Received Date	Expiration Date	Updated By
Lactation Expert	11/15/2006	12/31/2007	pprogar
Master	11/7/2005	12/31/2006	pprogar
Bachelor of Science	1/5/2005	12/31/2005	kline

State Sponsored Training History

State Sponsored Training	Received Date	Updated By
Sexual Harassment	1/24/2006	pprogar
State Procurement Rules	11/14/2004	kline
WIC Excellence	12/22/2001	pprogar

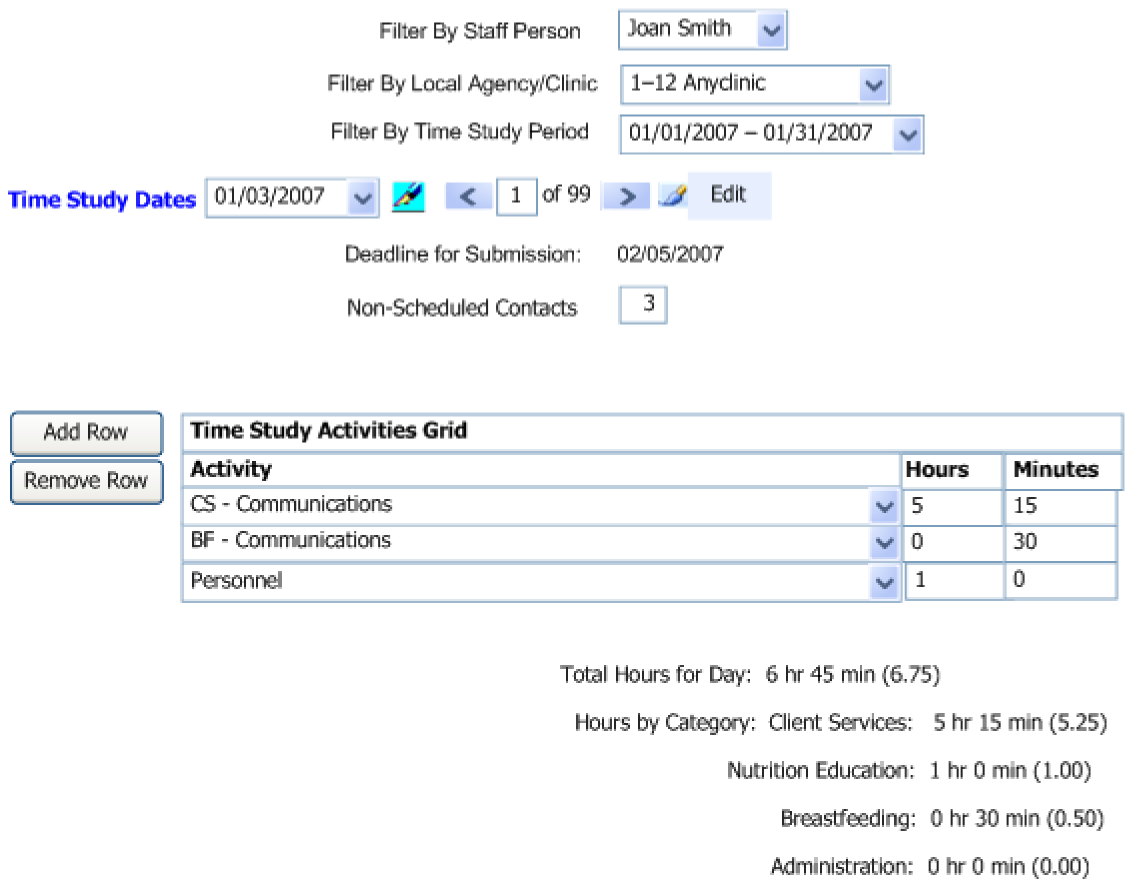
Other Training History

Other Training	Received Date	Updated By
MS Word - Local Community College	2/23/2006	jdoe
EBT Primer	10/24/2006	jdoe
MS Excel - CBT from Online Learning	7/25/2006	jdoe

3.3 Time Study Entry

The Time Study Entry screen allows WIC staff to enter their Time Study activities on a daily basis. It also allows staff members with the appropriate authority to view another staff person's time study entries.

> Staff > Time Study Entry



Control	Description	
Filter By Staff Person	A filter of the values of all staff members to which the user has access. This control defaults to the current user.	
	Type	List Box
	Required	No
	DB Column	TimeStudyStaff.Stfp_ID
	Code ID	StaffPerson table lookup
Filter By Local Agency/Clinic	A filter of the values of the local agency and clinic for which the staff member is submitting his or her time study. Only clinics to which the staff member belongs are listed; the clinic with which the staff member signed on is the default clinic.	
	Type	List Box
	Required	Yes
	DB Column	TimeStudyStaff.Cln_ID
	Code ID	Clinic table lookup

Control	Description			
Filter By Time Study Period	A filter of the values of the start and end dates of the time studies. Only time studies setup for the clinic's local agency or statewide will be available.			
	Type	List Box		
	Required	Yes		
	DB Column	TimeStudy.StartDt + - + TimeStudy.EndDt		
	Code ID	TimeStudy table lookup		
Time Study Date	This is record selector containing the dates for which the staff member can enter his or her daily activities and time.			
	Type	Record Selector (Dates)		
	Contents	Dates		
	DB Column	TimeStudyStaff.TimeStudyDt		
Edit	Clicking the Edit command button causes the record to be editable.			
	Type	Command Button		
	Hot Key	Alt + T		
Deadline for Submission	The last date that the user is permitted to enter time for the selected time study.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of mm/dd/yyyy		
	Display Only	Yes	**Calculated**	No
Non-Scheduled Contacts	This is the number of non-scheduled contacts that this user had during this day. State policy will dictate what constitutes a non-scheduled contact.			
	Type	Text Box		
	Required	No		
	Length	Integer 2, Mask of Z9.		
	Validation	Numeric		
	Display Only	No	**Calculated**	No
	DB Column	TimeStudyStaff.ContactNr		
Time Study Activities Grid	The data grid is used to indicate the activities the staff member performed during the date selected.			
	Type	Data Grid		

Control	Description			
Add Row	Clicking the Add Row command button allows the user to enter a new entry in the time study activities grid.			
	Type	Command Button		
	Hot Key	Alt + A		
Remove Row	Clicking the Remove Row command button allows the user to remove an entry in the time study activities grid.			
	Type	Command Button		
	Hot Key	Alt + R		
Activities - Activity	The short description of the activity.			
	Type	List Box		
	Required	Yes		
	DB Column	TimeStudyActivity.TSAT_ID		
	Code ID	TimeStudyActivityType table lookup		
Activities - Hours	This is the number of whole hours that the staff member spent on the selected activity.			
	Type	List Box		
	Required	Yes		
	DB Column	TimeStudyActivity.HourNr		
	Code ID	Hard coded (0 to 24)		
Activities – Minutes	This is the number of minutes (in five minute increments) that the staff member spent on the selected activity.			
	Type	List Box		
	Required	Yes		
	DB Column	TimeStudyActivity.MinuteNr		
	Code ID	Hard coded (0 to 55)		
Total Hours For Day	The total number of hours for the date selected.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of 9 hr 99 min (9.99)		
	Display Only	Yes	**Calculated**	Yes
	DB Column	NA		

<table>
<tr><th>Control</th><th colspan="4">Description</th></tr>
<tr><td rowspan="7">Hours by Category: Client Services</td><td colspan="4">This is the Client Services portion of the total hours for the date selected.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">NA</td></tr>
<tr><td>Validation</td><td colspan="3">Mask of 9 hr 99 min (9.99)</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>Yes</td></tr>
<tr><td>DB Column</td><td colspan="3">NA</td></tr>
<tr><td rowspan="7">Nutrition Education</td><td colspan="4">This is the Nutrition Education portion of the total hours for the date selected.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">NA</td></tr>
<tr><td>Validation</td><td colspan="3">Mask of 9 hr 99 min (9.99)</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>Yes</td></tr>
<tr><td>DB Column</td><td colspan="3">NA</td></tr>
<tr><td rowspan="7">Breastfeeding</td><td colspan="4">This is the Breastfeeding portion of the total hours for the date selected.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">NA</td></tr>
<tr><td>Validation</td><td colspan="3">Mask of 9 hr 99 min (9.99)</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>Yes</td></tr>
<tr><td>DB Column</td><td colspan="3">NA</td></tr>
<tr><td rowspan="7">Administration</td><td colspan="4">This is the Administration portion of the total hours for the date selected.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">NA</td></tr>
<tr><td>Length</td><td colspan="3">NA</td></tr>
<tr><td>Validation</td><td colspan="3">Mask of 9 hr 99 min (9.99)</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>Yes</td></tr>
<tr><td>DB Column</td><td colspan="3">NA</td></tr>
</table>

<table>
<tr><th>Control</th><th colspan="4">Description</th></tr>
<tr><td rowspan="6"><Last Modified By User and Date></td><td colspan="4">In the lower right-hand corner, the user and the date of the last update of this time study or activity records is displayed.</td></tr>
<tr><td>Type</td><td colspan="3">Text Box</td></tr>
<tr><td>Required</td><td colspan="3">No</td></tr>
<tr><td>Length</td><td colspan="3">NA</td></tr>
<tr><td>Validation</td><td colspan="3">Mask of ‘firstname lastname mm/dd/yyyy’</td></tr>
<tr><td>Display Only</td><td>Yes</td><td>Calculated</td><td>No</td></tr>
</table>

Business Rules

1. The Staff Person drop-down list defaults to the current user. If the user is a clinic supervisor, that person may update any staff members from their clinic. A user is given clinic supervisor access to the Time Study Entry panel if they are assigned a security role for the Operations functional area that includes the Time Study Entry – Clinic Supervisor task with User Exec Level equal to a value other than None.
2. Time studies setup for the clinic’s local agency or statewide will be available based on the person’s clinics. They will be available between the start date (00:00) and the deadline date (23:59).
3. Only the activities assigned to the user staff type via the staff's profile are available to the user (e.g., Jill is a nutritionist so she is only permitted to select from activities that are assigned to nutritionists).
4. When the mouse is located over the activity column in grid row, the long description will be displayed as a tool tip (hovering).
5. Disable the Edit button when a date record is selected that is greater than the current date. Hours cannot be entered for a date in the future.
6. Only active time studies are editable for staff entering hours. Previous studies are available for viewing purposes only (for time studies within the last three years). In this case, hours for any date can be updated.
7. Permission is granted for managers to update other staff members' time study reports. This is permitted even after the deadline date.
8. The Time Study Period defaults to the active time study period or the most recent one.
9. The Time Study Date defaults to the current date.
10. The Edit command button is enabled when the selected time study is active.
11. The Hours by Category are the 4 non-editable values found in the Code table for Cost Category.
12. The Hours by Category are calculated by adding the total hours entered for all the activities for the staff person for all clinics. Users may belong to more than one clinic. Hours for all clinics are used to determine total hours per day per user ID.
13. The Total Hours for Day are calculated by adding the Hours by Category for the day.
14. Display an error if Total Hours for Day is more than 24 per staff person
15. Hours are hard coded list box which contains 0 – 24.
16. Minutes are hard coded list box which contains minutes in 5 minute increments (0 - 55).
17. Sort Time Study Activities Grid by Activity.

Business Rules
18. Display time study records whose start dates are within the last three years.

Developer Notes
1. The system creates all the records for a user for a given time study period when a user first enters data in any date record in that time period. However, the Modified Date and User ID are only displayed when there is data is entered on a particular date record. If no data exists, the Modified Date and User ID will not be displayed.