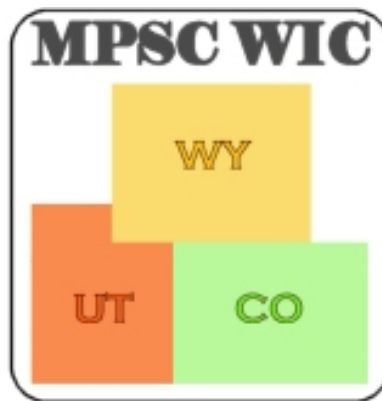

Mountain Plains States Consortium WIC System Project

DETAILED FUNCTIONAL DESIGN DOCUMENT OP 2 OPERATIONS INVENTORY SCREENS

Presented to:



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Document Revisions

Revision Date	Updated By	Requested By	Description of Revision

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1 State FI Stock Inventory

The State FI Stock Inventory sections are where the state administers its FI Stock inventory. The functions found in this section will be available to the system when the System.FoodBenefitDeliveryMethod system parameter is set to "FI".

These screens allow the tracking of FI Stock inventory at the state level. These screens allow the state to perform their inventory functions. There are two screens that will allow this tracking to be performed. The first is a summary screen that shows the aggregate status of the FI Card Stock while allowing adjustments to the state inventory. The second is the state shipment tracking (both received by state and shipped from the state).

1.1 Summary

The State FI Stock Inventory Summary screen provides a current summary of the FI Stock in the state inventory. It shows the inventory levels of blank FI checks, gives a sense of pace of usage and gives them the ability to set a threshold that will automatically generate warnings and alerts of a need for replenishment.

Adjustments are able to be made to account for changes (i.e. physical inventory, damaged) in the state inventory.

> *State FI Stock Inventory > Summary*

Current Inventory: 80,000
 Pipeline Inventory: 100,000
 Shipped Last 12 Months: 600,000
 Inventory Months: 1.6
 Replenishment Threshold:
 Currently On Order:
 Current Order Date:

Warning: Boxes of FI Stock are in need of replenishment immediately.

Add Row
 Remove Row

Inventory Adjustments Transactions				
	Adjustment Date	Quantity	Explanation	Updated By
>	11/15/2006	-2000	Shipment destroyed in UPS accident	jsmith
	03/12/2004	-1,000	Destroyed by flood	tjones
	04/15/2001	200	Physical inventory count	jsmith

Control	Description			
Current Inventory	This is the estimated current inventory quantity of the FI blank checks in the FI stock.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Pipeline Inventory	This is the current pipeline (shipped out by state but not received by the local agency of clinic) quantity of the FI blank checks in the FI stock.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Shipped Last 12 Months	This is the quantity of the FI blank checks of FI stock that has been shipped over the last 12 months. This is to give the user a sense of the pace of usage.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Inventory Months	This is the amount of current inventory expressed in months (based on pace of last 12 months shipped).			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of Z9.9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		

Control	Description			
Replenishment Threshold	This is the amount of inventory that is set to control when a warning alert occurs. It is compared to the current inventory + the currently on order.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 8		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	FIStockStateThreshold.ReplenishmentQty		
Currently On Order	This is the amount of inventory that is currently on order. It is used to control the replenishment warning alert. When a replenishment warning alert occurs, the user would initiate an order with FI check provider and place the amount in this field. When a state shipment is received, this value would need to be decreased accordingly.			
	Type	Text Box		
	Required	Yes, if Current Order Date has a value		
	Length	Integer 8		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	FIStockStateThreshold.OrderQty		
Current Order Date	This is the date that the current order has been placed.			
	Type	Date Picker		
	Required	Yes, if Currently On Order has a value		
	Display Only	No	Calculated	No
	DB Column	FIStockStateThreshold.OrderDt		
Add Row	Clicking the Add Row command button creates a new row in the data grid allowing the user to a complete the information about the adjustments.			
	Type	Command Button		
	Hot Key	Alt + A		
Remove Row	Clicking the Remove Row command button removes the selected row from the data grid.			
	Type	Command Button		
	Hot Key	Alt + R		

Control	Description			
Inventory Adjustments	The data grid is used to record any inventory adjustments.			
	Type	Data Grid		
Adjustment Date	Date the adjustment was made. Defaults to current date.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	FIStockStateAdjustment.AdjustmentDt		
Quantity	This is the actual quantity of the blank FI checks to adjust in the inventory calculations.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 4		
	Validation	Numeric, Mask of -Z,ZZ9 (negative or positive)		
	Display Only	No	Calculated	No
	DB Column	FIStockStateAdjustment.AdjustmentQty		
Explanation	This is the explanation of why the adjustment was made.			
	Type	Text Box		
	Required	No		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	FIStockStateAdjustment.Explanation		
Updated By	This is the user id of the user who last updated the adjustment transaction.			
	Type	Text Box		
	Required	NA		
	Length	25		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	FIStockStateAdjustment.ModifyStfpID		

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 state FI stock summary inventory 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	Most recent of FIStockStateThreshold.ModifyStfpID + FIStockStateThreshold.ModifyDt or FIStockStateAdjustment.ModifyStfpID + FIStockStateAdjustment.ModifyDt		

Business Rules
<ol style="list-style-type: none"> 1. Current Inventory is calculated by counting all the quantity (box quantity * quantity per box) that has not been shipped to the local agency / clinics and the inventory adjustments. 2. Pipeline Inventory is calculated by counting all the quantity (box quantity * quantity per box) that has been shipped to the local agency / clinics but not received by the local agency / clinic. 3. Shipped Last 12 months is quantity (box quantity * quantity per box) of inventory that has been shipped to the local agency / clinics in the last 12 months (from the current date). 4. Inventory Months is the Current Inventory divided by the value of Shipped Last 12 Months divided by 12 (i.e. With Current Inventory at 80,000 and Shipped Last 12 Months at 600,000, then the Inventory Months would equal 1.6 months). 5. When Current Inventory + Currently On Order is less than Replenishment Threshold, then: <ol style="list-style-type: none"> a. Display FI checks Inventory Replenishment message on the screen. Format of message is defined in the Operation Overview DFDD. b. Display a FI checks Inventory Replenishment alert in the operations area for the state user. 6. Adjustments rows visible in the grid will be limited to the number of past months defined in the system parameter Operations.StockInventoryTransactionHistory. 7. Sort grid by Adjustment Date.

Developer Notes
<ol style="list-style-type: none"> 1. A summary record for FI Stock must be setup at install time.

1.2 Shipments

The screen is used for the individual tracking shipment information regarding the FI Stock. Each record represents a range of boxes of FI Stock (typically a shipment to the state from the item manufacturer). Attributes are used to describe this range. The bottom of this screen is for the tracking of shipments to local agencies and/or clinics.

An important distinction for consistency is the quantity fields. The Shipment Begin Box Number, Box Quantity and calculated Shipment End Box Number are to be set according to the boxes whereas the Quantity Per Box is actual number of blank FI checks within the box. It is important to be consistent when recording the shipments to the local agencies and/or clinics.

> *State FI Stock Inventory > Shipments*

Record Date: 11/15/2006 [dropdown] [icon] < 1 of 99 > [icon] New [icon] Edit [icon] Delete [icon]

Begin Box Number: 2001
 End Box Number: 3000
 Quantity of Boxes: 1,000
 Quantity Not Shipped: 350
 Quantity per Box: 50
 Received Date: 11/14/2006 [dropdown]
 Comments: Shipment came via UPS. Tracking problems occurred [text area]

[Add Row] [Remove Row]

Distribution to Local Agency or Clinic											
	LA	Clinic	Dist Date	Begin	End	Box Qty	Rec'd Date	Rec'd	Not Rec'd	Update By	Verify By
>	1 Fargo [dropdown]	[dropdown]	10/15/2006 [dropdown]	2501	2650	150	10/24/2006	150	150	jshark	
	2 Cityx	12	10/08/2006	2001	2200	200					
	4 Anyagency		09/18/2006	2201	2500	300	09/22/2006	250	50	jshark	tshaw

Control	Description
New	The New command button is used to create a new range (shipment to state) record about the FI Stock.
	Type Command Button
	Hot Key Alt + N
Edit	The Edit command button is used to update the range record about the FI Stock.
	Type Command Button
	Hot Key Alt + T

Control	Description			
Delete	The Delete command button is used to delete the range record about the FI Stock			
	Type	Command Button		
	Hot Key	Alt + D		
Record Date	This is the record selector for the range records. It contains the recorded date. The drop-down and spin control allow selection of current and historical range records. When the New button is clicked, this date defaults to today's date. It can be updated by the user.			
	Type	Record Selector (using Date Picker)		
	Contents	Formatted dates of 'mm/dd/yyyy'		
	DB Column	FIStockStateReceipt.RecordedDt		
Begin Box Number	This is the beginning box number of the boxes of this range record.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 8		
	Validation	Numeric, Mask of Z9		
	Display Only	No	Calculated	No
	DB Column	FIStockStateReceipt.BeginBoxNr		
End Box Number	This is the ending box number of the boxes for this range record.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 8		
	Validation	Numeric, Mask of Z9		
	Display Only	No	Calculated	No
	DB Column	FIStockStateReceipt.EndBoxNr		
Quantity of Boxes	This is the calculated quantity of the boxes based on beginning and ending box numbers for this range record.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		

Control	Description			
Quantity Not Shipped	This is the calculated quantity of the boxes that has not been shipped to local agencies or clinics for this range record.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Quantity Per Box	This is the quantity of blank FI checks per box. This is used in all inventory calculations.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 4		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	FIStockStateReceipt.QuantityPerBoxNr		
Received Date	This is the date that the range record was received (i.e. shipment received date). This is for informational purposes only.			
	Type	Date Picker		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	FIStockStateReceipt.ReceivedDt		
Comments	This is a large text box to record any comment about the range record (i.e. whether it is a shipments, from whom, problems). The maximum number of characters allowed is 300.			
	Type	Multi Line Text Box		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	FIStockStateReceipt.Comments		
Add Row	Clicking the Add Row command button creates a new row in the data grid allowing the user to a complete the information about a shipment to a local agency or clinic.			
	Type	Command Button		
	Hot Key	Alt + A		

Control	Description			
Remove Row	Clicking the Remove Row command button removes the selected row from the data grid.			
	Type	Command Button		
	Hot Key	Alt + R		
Distribution to Local Agency or Clinic	The data grid is used to record any distributions against this range record to a local agency or clinic.			
	Type	Data Grid		
LA	If the clinic is blank, then this is the local agency where the shipment was sent. If the clinic is not blank, this is the local agency where the clinic is located.			
	Type	List Box		
	Required	Yes. Length of 20		
	DB Column	FIStockStateShipment.LA_ID		
	Code ID	LocalAgency table lookup		
Clinic	This is the clinic where the shipment was sent.			
	Type	List Box		
	Required	No, Length of 20		
	DB Column	FIStockStateShipment.Cln_ID		
	Code ID	Clinic table Lookup		
Dist Date	Date that the distribution was made.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	FIStockStateShipment.ShippedDt		
Begin	This is the beginning box number for this shipment record.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 8		
	Validation	Numeric, Mask of Z9		
	Display Only	No	Calculated	No
	DB Column	FIStockStateShipment.BeginBoxNr		

Control	Description			
End	This is the ending box number for this shipment record.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 8, Mask of Z9		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	FIStockStateShipment.EndBoxNr		
Box Qnty	This is the calculated quantity of the boxes based on beginning and ending box numbers.			
	Type	Text Box		
	Required	NA		
	Length	4		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Rec'd Date	This is the date received by the ship receiving location.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of mm/dd/yyyy		
	Display Only	Yes	Calculated	No
	DB Column	FIStockStateShipment.ReceivedDt		
Rec'd	This is the quantity of boxes received by the ship receiving location.			
	Type	Text Box		
	Required	NA		
	Length	4		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	No
	DB Column	FIStockStateShipment.BoxesReceivedNr		

Control	Description				
Not Rec'd	This is the quantity of boxes not received by the ship receiving location.				
	Type	Text Box			
	Required	NA			
	Length	4			
	Validation	Mask of Z,ZZ9			
	Display Only	Yes	Calculated	No	
	DB Column	FIStockStateShipment.BoxesNotReceivedNr			
Update By	This is the user id who updated the receiving information at the ship receiving location.				
	Type	Text Box			
	Required	NA			
	Length	25			
	Validation	NA			
	Display Only	Yes	Calculated	No	
	DB Column	FIStockStateShipment.InsertStfpID			
Verify By	This is the user id who verified the receiving information at the ship receiving location.				
	Type	Text Box			
	Required	NA			
	Length	25			
	Validation	NA			
	Display Only	Yes	Calculated	No	
	DB Column	FIStockStateShipment.VerifyStfpID			
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this FI stock shipment 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	most recent of FIStockStateShipment.ModifyStfpID + FIStockStateShipment.ModifyDt or FIStockStateReceipt.ModifyStfpID + FIStockStateReceipt.ModifyDt			

Business Rules

1. Range Inventory records assume that begin and end box numbers represents a contiguous set of numbers. Quantity of Boxes is calculated by subtracting the Begin Box Number value from the End Box Number value (plus one). Display error if End Box Number is not greater than the Begin Box Number.
2. Quantity Not Shipped is calculated by subtracting the sum of the Local Agency or Clinic Shipment's Box Qty from the Quantity of Boxes.
3. Shipments may be to Local Agencies or to Clinics. Depending on the selected Local Agency, the Clinic list box could contain a blank (meaning shipment is to local agency) or a list of clinics based on whether they are setup as a Stock Inventory Point (setup in System Admin of Clinics).
4. Shipment grid rows assume that the Begin and End represent a contiguous set of numbers. Box Qty is calculated by subtracting a row's Begin value from the End value (plus one). Display error if End is not greater than the Begin.
5. A shipment row record will not be allowed to be saved and error messages will be displayed when its Begin and End values:
 - a. are not found to be in the Begin Box Number and End Box Number of the range record
 - b. are found to overlap within other shipment row records.
6. The Rec'd Date, Rec'd, Not Rec'd, Update By and Verify By are display-only and are based on system recorded receipts at the local agency or clinic.
7. Record Dates (state received shipments) records visible in the list box will be limited to the number of past months defined in the system parameter Operations.StockInventoryTransactionHistory.
8. Disable the Delete button if a LA/Clinic shipment row exists.
9. Sort order for grid is the Dist Date, LA and Clinic.
10. Disable the Remove Row button if a LA/Clinic shipment row has been received.
11. Do not allow rows to be edited of a LA/Clinic shipment has been received.

Developer Notes

1. Add Row and Remove Row buttons should be above grid to maximize grid size
2. When a shipment is saved, the system needs to see if there exists a FIStockLocalThreshold records exists for the specified location. If it does not, then generate a new empty record. This is how new locations get added when LA/Clinics are added or inventory control points are changed.

2 LA/Clinic FI Stock Inventory

The LA or Clinic FI Stock Inventory sections are where the local agency or clinic administers its FI Stock inventory. The functions found in this section will be available to the system when the System.FoodBenefitDeliveryMethod system parameter is set to "FI".

These screens allow the tracking of FI Stock inventory at the local agency or clinic level. Full access to this function is controlled by a user role in the security module based on access rights to the local agency or clinic. There are two screens that allow this tracking to be performed. The first is the local agency or clinic receiving the shipment from the state. The second is a summary screen that shows the aggregate status of the tracked item at the local agency or clinic level. This includes the ability to do adjustments.

2.1 Shipment Receiving

This screen is used for the local agency or clinic personnel to acknowledge the received shipment from the state. The screen enforces the accounting of the entire shipment; therefore, local agency or clinic personnel must only update the receipt information when they are able to account for the entire shipment. Detail information about the shipment is displayed.

> *LA/Clinic FI Stock Inventory > Shipment Receiving*

Expected Shipments 10/8/2006 – 2001 to 2200 1 of 99 Edit

Shipped Not Received
 Received Not Verified
 Received and Verified

Verify

Box Quantity Shipped: 200
 Quantity Per Box Shipped: 50
 Total Quantity: 1,000
 Local Agency: 2 Fargo Public Health
 Clinic: 12 Great Plains
 Received Date: 12/14/2006
 Box Quantity Received: 150
 Box Quantity Not Received: 50
 Updated By:
 Verified By:

Control	Description	
Edit	The Edit command button is used to edit the shipment receiving record.	
	Type	Command Button
	Hot Key	Alt + T
Verify	The Verify command button is used to record verification against the shipment receive record.	
	Type	Command Button
	Hot Key	Alt + V
Shipped Not Received	Selecting this radio button limits the shipment records to those that have been created by the state, but where no received information has been updated.	
	Type	Radio Button
	Required	No
	DB Column	NA
Received Not Verified	Selecting this radio button limits the shipment records to those that have been updated with received information, but have not had anyone verify them yet.	
	Type	Radio Button
	Required	No
	DB Column	NA
Received and Verified	Selecting this radio button limits the shipment records to those that have been updated with received information and have been verified.	
	Type	Radio Button
	Required	No
	DB Column	NA
Expected Shipments	This is the record selector for the shipment received records. It contains a concatenation of the shipment date, range begin and range end values of the shipment. The drop-down and spin control allow selection of current and historical range records.	
	Type	Record Selector
	Contents	Formatted as "mm/dd/yyyy – ZZZZZZ9 to ZZZZZZ9"
	DB Column	FIStockStateShipment.ShippedDt + FIStockStateShipment.BeginBoxNr + FIStockStateShipment.EndBoxNr

Control	Description			
Box Quantity Shipped	This is the calculated quantity of the shipment based on beginning and ending box numbers.			
	Type	Text Box		
	Required	NA		
	Length	4		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Quantity Per Box Shipped	This displays the Quantity Per Box Shipped from the original state shipment setup. This is to convey that the box has a quantity itself (i.e. 50 FI sheets).			
	Type	Text Box		
	Required	NA		
	Length	4		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	No
	DB Column	NA		
Total Quantity	This is the calculated total quantity of the shipment based on beginning and ending box numbers times the Quantity Per Box.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Local Agency	If the clinic is blank, then this is the local agency where the shipment was sent. If the clinic is not blank, this is the local agency ID where the clinic is located.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	NA		

Control	Description				
Clinic	If applicable, this is the clinic where the shipment was sent.				
	Type	Text Box			
	Required	NA			
	Length	NA			
	Validation	NA			
	Display Only	Yes	Calculated	No	
	DB Column	NA			
Received Date	This is the date that the shipment was received.				
	Type	Date Picker			
	Required	Yes			
	Display Only	No	Calculated	No	
	DB Column	FIStockStateShipment.ReceivedDt			
Box Quantity Received	This is the box quantity received by the receiving location.				
	Type	Text Box			
	Required	Yes			
	Length	Integer 4			
	Validation	Numeric, Mask of Z,ZZ9			
	Display Only	No	Calculated	No	
	DB Column	FIStockStateShipment.BoxesReceivedNR			
Box Quantity Not Received	This is the quantity not received by the ship receiving location.				
	Type	Text Box			
	Required	No			
	Length	Integer 4			
	Validation	Numeric, Mask of Z,ZZ9			
	Display Only	No	Calculated	No	
	DB Column	FIStockStateShipment.BoxesNotReceivedNr			

Control	Description			
Updated By	This is the user id updating the received information.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	FIStockStateShipment.ModifyStfpID		
Verified By	This is the user id verifying the received information.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	FIStockStateShipment.VerifyStfpID		

Business Rules
<ol style="list-style-type: none"> 1. Screen defaults to Shipped Not Received. The radio buttons are used to control the number of expected shipment records shown in the Expected Shipment drop-down. Generally speaking: <ol style="list-style-type: none"> a. Shipped Not Received – Used when user is planning to update system of a received shipment. b. Received Not Verified – Used when user is verifying the update that a peer user has made regarding a received shipment. c. Received and Verified – Used to research historical received shipments. 2. The most recent expected shipment record is displayed. The record date contains the available expected shipment records for selection. 3. User can only see the expected local agency / clinic shipments where security access has been granted. 4. For view selection of Received and Verified, the Edit button is disabled and the Verify By button is disabled (view only screen). 5. Clicking the Verified button will update the record's Verified By column with the user ID and switch the view to Received and Verified. 6. For view selection of Received Not Verified, enable Verify button only when the record has been updated by user ID is not the current user. The Verify button is available without having to press the Edit button to be in edit mode. Policy requires that these must be different people. 7. Display an error message if the Box Quantity Shipped is not equal to Box Quantity Received + Box Quantity Not Received.

Business Rules
8. Box Quantity Shipped is calculated by subtracting the expected shipment record range begin from the range end and adding 1.
9. Expected Shipment Date records visible in the list box will be limited to the number of past months defined in the system parameter Operations.StockInventoryTransactionHistory.
10. When a shipment is verified, clear the corresponding (per the LA/Clinic) Inventory Summary fields on Currently On Order and Current Order Date. This ensures that the user does not forget to clear these 'order' fields when a shipment is processed.

Developer Notes
1. The Updated By: contains the user id of the person who processes the record using the Edit command button.
2. The Verified By: contains the user id of the person who processes the record using the Verify command button.

2.2 Summary

This screen summarizes the current status of FI Stock at a local agency or clinic. It shows the inventory levels of blank FI checks, gives a sense of pace of usage, and gives users the ability to set a threshold that automatically generates warnings and alerts of a need for replenishment. Adjustments are able to be made to account for changes in inventory outside of consumption (i.e. physical inventory, damaged).

> LA/Clinic FI Stock Inventory > Summary

LA / Clinic

Current Inventory: 800
 Received Last 12 Months: 6,000
 Inventory Months: 1.6
 Replenishment Threshold
 Currently On Order
 Current Order Date

Warning: FI checks are in need of replenishment for 1-5

Inventory Adjustments					
	Adjustment Date	Quantity	Explanation	Updated By	
<input type="button" value="Add Row"/>	>	11/15/2006	-50	Physical Inventory adjustment	jsmith
<input type="button" value="Remove Row"/>		03/12/2006	-100	Destroyed by heater	tjones
		11/15/2005	-25	Physical inventory count	jsmith

Control	Description			
Edit	The Edit command button is used to update summary data about the FI Stock for the displayed local agency or clinic.			
	Type	Command Button		
	Hot Key	Alt + T		
LA / Clinic	This is the local agency and/or clinic where inventory is managed.			
	Type	List Box, Format of Z9 xxxxxx for Local Agency records, Format of Z9 xxxxxx ' / ' Z9 xxxxxx for Clinic records, Length of 70		
	Required	Yes		
	DB Column	FIStockLocalThreshold.LA_ID FIStockLocalThreshold.Cln_ID		
	Code ID	Local Agency / Clinic table Look up		
Current Inventory	This is the estimated current inventory quantity of the FI blank checks at the local agency or clinic level.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of -Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Received Last 12 Months	This is the quantity of the FI blank checks that have been received over the last 12 months at the local agency or clinic level. This gives the user a sense of the pace of usage of the FI blank checks.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		

Control	Description			
Inventory Months	This is the amount of current inventory expressed in months (based on pace of last 12 months received).			
	Type	Text Box		
	Required	NA		
	Length	6		
	Validation	Mask of -Z9.9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Replenishment Threshold	This is the amount of inventory of FI blank checks at the local agency or clinic level that is set to control when a warning alert occurs. It is compared to the Current Inventory + the Currently On Order.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 8		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	FIStockLocalThreshold.ReplenishmentQty		
Currently On Order	This is the amount of inventory of the FI blank checks at the local agency or clinic level that is currently on order. It is used to control the replenishment warning alert. When a replenishment warning alert occurs, the user would initiate an order and place the amount in this field.			
	Type	Text Box		
	Required	Yes, if Current Order Date has a value		
	Length	Integer 8		
	Validation	Numeric (positive number), Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	FIStockLocalThreshold.OrderQty		
Current Order Date	This is the date that the current order has been placed.			
	Type	Date Picker		
	Required	Yes, if Currently On Order has a value		
	Display Only	No	Calculated	No
	DB Column	FIStockLocalThreshold.OrderDt		

Control	Description			
Add Row	Clicking the Add Row command button creates a new row in the data grid allowing the user to complete the information about the adjustments.			
	Type	Command Button		
	Hot Key	Alt + A		
Remove Row	Clicking the Remove Row command button removes the selected row from the data grid.			
	Type	Command Button		
	Hot Key	Alt + R		
Inventory Adjustments	The data grid is used to record any inventory adjustments at the local agency or clinic level.			
	Type	Data Grid		
Adjustment Date	Date the adjustment was made. When the Add Row button is pressed, this date defaults to current date.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	FIStockLocalAdjustment.AdjustmentDt		
Quantity	This is the actual quantity of the blank FI checks to adjust in the inventory calculations.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 4		
	Validation	Numeric, Mask of -Z,ZZ9 (negative or positive)		
	Display Only	No	Calculated	No
	DB Column	FIStockLocalAdjustment.AdjustmentQty		
Explanation	This is the explanation of why the adjustment was made.			
	Type	Text Box		
	Required	No		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	FIStockLocalAdjustment.Explanation		

Control	Description			
Updated By	This is the user id of the last user to update this adjustment.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	FIStockLocalAdjustment.ModifyStfpID		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this FI stock summary inventory record and related adjustment transactions is displayed.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of 'firstname lastname mm/dd/yyyy'		
	Display Only	Yes	Calculated	No
	DB Column	Most recent of FIStockLocalThreshold.ModifyStfpID + FIStockLocalThreshold.ModifyDt or FIStockLocalAdjustment.ModifyStfpID + FIStockLocalAdjustment.ModifyDt		

Business Rules
<ol style="list-style-type: none"> 1. Users can only see the adjustment records to which they have local agency / clinic access (i.e. list boxes populated accordingly). The Clinic list box will contain a blank (meaning local agency) or a list of clinics based on whether they are setup as a Stock Inventory Point (setup in System Admin of Clinics). 2. Current Inventory is calculated by counting: <ol style="list-style-type: none"> a. Add all received and verified shipments to the local agency / clinics. This is in context to the Quantity per Box * Range Quantity. b. Adjustment Quantities c. Subtract all FIs issued * System.FIStockWastageFactor <p>Note: Each time an FI is Issued, a counter on the clinic table is incremented. When the system is implemented, this value is zero (only FI issued within this system is counted). A starting balance of unused FIs should be added as an adjustment transaction.</p> 3. Received Last 12 Months is amount of inventory that has been shipped to the local agency / clinics in the last 12 months (from the current date). 4. Inventory Months is the Current Inventory divided by the (Received Last 12 Months divided by 12) (i.e. With Current Inventory at 800 and Received Last 12 Months at 6,000, then the Inventory Months would equal 1.6 months).

Business Rules

5. When Current Inventory + Currently On Order is less than Replenishment Threshold, then:
 - a. Display FI checks Inventory Replenishment message on the screen. Format of message is defined in the Operation Overview DFDD.
 - b. Display a FI checks Inventory Replenishment alert in the operations area for the LA/Clinic user.
6. When Currently On Order has a value and the Current Order Date is less than or equal to the current date and there are no Shipment records for this LA/Clinic whose Shipment Date is greater or equal to Current Order Date then Display a FI checks Order alert in the operations area for the state user.
7. Adjustments rows visible in the grid will be limited to the number of past months defined in the system parameter Operations.StockInventoryTransactionHistory.
8. Adjustment transactions sort by Adjustment Date.
9. The Last Modified data is empty until a user first accesses this screen. The reason is that a record does not actually exist at this point. When a user first accesses the screen, the system evaluates all inventory points and generates a summary record for every inventory point that the user has access to that does not already have a record generated. The Last Modified data will show on these records even though the user did not directly update the record on the screen. If a user attempts to leave without saving, a save confirmation will occur as this is when the system creates summary records as inventory points. Once the initial record is generated, then it only has its Last Modified data when a screen update is made.

Developer Notes

- 1.

3 State EBT Card Inventory

The State EBT Card Inventory sections are where the state administers its EBT card inventory. The functions found in this section will be available to the system when the System.FoodBenefitDeliveryMethod system parameter is set to "EBT".

These screens will allow the tracking of EBT Card inventory at the state level. EBT Cards are tracked according to shipments of ranges of card numbers. This is also known as the Primary Account Number (PAN). The system will use the label of 'Card Number' as it is easily understood by the general WIC population. The card number is a sixteen digit number. The first eight digits are assigned to a state for an extended period of time. The next seven digits represent the serial number. The last digit is a check digit calculated based on the first 15 digits. The system contains the algorithm to calculate (or validate) this check digit. This algorithm is documented in the System Overview DFDD.

There are screens that will allow the state to perform their inventory functions. The first is a summary that shows the aggregate status of the EBT cards from a state perspective as well as the adding EBT cards to the state inventory via inventory addition transactions. The second allows the state to make adjustments (i.e. lost, stolen, damaged) to their inventory while under their "ownership". The third is to ship EBT cards to the local agency or clinic.

3.1 Summary

The State EBT Card Inventory Summary screen provides a current summary of the EBT card from a state perspective. It shows the current inventory, gives a sense of pace of usage and gives the user the ability to set a threshold that will automatically generate warnings and alerts of a need for replenishment.

The Add Inventory Transactions grid is used to add EBT cards to the system. Each row represents a sequential set of card numbers that has been added into the state's inventory. These sets of card numbers are described by a Begin Card Number and the sequential quantity.

> State EBT Card Inventory > Summary

Current Inventory: 8,000
 Pipeline Inventory: 10,000
 Shipped Last 12 Months: 60,000
 Inventory Months: 1.6
 Replenishment Threshold:
 Currently On Order
 Current Order Date


Warning: EBT cards are in need of replenishment immediately.

Inventory Add Transactions					
	Begin Card Number	Quantity	End Card Number	Add Date	Comments
>	80000358-0002450-8	2,000	80000358-0004449-8	11/15/2006	New emblem
	80000358-0001284-5	1,000	80000358-0002283-5	03/12/2004	
	80000358-0000038-4	2,500	80000358-0025037-4	04/15/2001	

Control	Description			
Current Inventory	This is the current inventory quantity of EBT cards that the state has available for shipping.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Pipeline Inventory	This is the current pipeline quantity of EBT cards that are shipped but not received.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		

Control	Description			
Shipped Last 12 Months	This is the quantity of EBT cards that has been shipped over the last 12 months.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Inventory Months	This is the amount of current inventory expressed in months (based on pace of last 12 months shipped).			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of Z9.9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Replenishment Threshold	This is the amount of inventory that is set to control when a warning alert occurs. It is compared to the current inventory + the currently on order.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 8		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateThreshold.ReplenishmentQty		

Control	Description			
Currently On Order	This is the amount of inventory that is currently on order from the card provider. It is used to control the replenishment warning alert. When a replenishment warning alert occurs, the user would initiate an order and place the amount in this field. When a state shipment is received, this value would need to be decreased accordingly.			
	Type	Text Box		
	Required	Yes, if Current Order Date has a value		
	Length	Integer 8		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateThreshold.OrderQty		
Current Order Date	This is the date that the current order has been placed. This is for informational purposes only.			
	Type	Date Picker		
	Required	Yes, if Current On Order has a value		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateThreshold.OrderDt		
Add Row	Clicking the Add Row command button creates a new row in the data grid allowing the user to a complete the information about the card addition transaction.			
	Type	Command Button		
	Hot Key	Alt + A		
Remove Row	Clicking the Remove Row command button removes the selected row from the data grid.			
	Type	Command Button		
	Hot Key	Alt + R		
Inventory Add Transactions	The data grid is for EBT card inventory addition transactions. When saved, these transactions will add the entered EBT cards to the system.			
	Type	Data Grid		

Control	Description			
Begin Card Number 	This is the beginning card number for this addition transaction. This icon button allows the user to read the card number from the card reader.			
	Type	Text Box		
	Required	Yes		
	Length	Decimal 20,0		
	Validation	Numeric, Mask of 99999999-9999999-9		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateAdjustment.BeginCardNr		
Quantity	This is the quantity of the EBT cards that will be added by this transaction. The system assumes that this identifies the next sequential card numbers. The system will calculate the numbers based on the card number algorithm.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 8		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateAdjustment.AdjustmentQty		
End Card Number	This is the calculated ending card number for this addition transaction. Its purpose is to assist the user in verifying that the correct quantity was entered.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of 99999999-9999999-9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Add Date	This is the date that the EBT cards will be marked as added to the system. When a row is added, default to current date.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateAdjustment.AdjustmentDt		

Control	Description				
Comments	This is for comments about this addition transaction.				
	Type	Text Box			
	Required	No			
	Length	50			
	Validation	NA			
	Display Only	No	Calculated	No	
	DB Column	EBTStockStateAdjustment.Explanation			
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this state EBT card summary inventory 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	Most recent of EBTStockStateThreshold.ModifyStfpID + EBTStockStateThreshold.ModifyDt or EBTStockStateAdjustment.ModifyStfpID + EBtStockStateAdjustment.ModifyDt			

Business Rules
<ol style="list-style-type: none"> 1. Current Inventory is calculated by counting all the cards that have been placed into their inventory but have not been shipped to the local agency / clinic. 2. Pipeline Inventory is calculated by counting all the cards that have been shipped to the local agency / clinics but not received by the local agency / clinic. 3. Shipped Last 12 months is amount of inventory that has been shipped to the local agency / clinics in the last 12 months (from the current date). 4. Inventory Months is the Current Inventory divided by the Shipped Last 12 Months divided by 12 (i.e. With Current Inventory at 8,000 and Shipped Last 12 Months at 60,000, then the Inventory Months would equal 1.6 months). 5. When Current Inventory + Currently On Order is less than Replenishment Threshold, then: <ol style="list-style-type: none"> c. Display EBT cards Inventory Replenishment message on the screen. Format of message is defined in the Operation Overview DFDD. d. Display an EBT cards Inventory Replenishment alert in the operations area for the LA/Clinic user. 6. On a save, the system processes only newly added rows (addition transactions). 7. The card reader icon is only functional on newly added rows. The user clicks the icon to invoke the card reader to read the card and place the card number into the Begin Card Number of the newly added row.

Business Rules

8. Remove Row is disabled unless an added row has not been processed (saved). This allows a user to remove a row that they mistakenly entered. Once a row (transaction) has been processed, it can not be removed. The Remove Row is only enabled when a newly added, unsaved row is selected.
9. Calculate the End Card Number based on the Begin Card Number with the quantity (assuming sequential numbering) and the check digit algorithm.
10. Display error if the Begin Card Number on any of the newly added rows is not valid according to the check digit algorithm.
11. Display an error if any card number(s) of newly added rows already exist in the system.
12. When add is successful, a history transaction for each card must be logged of its occurrence.
13. Previously processed rows (add) are for informational purposes. The data is display-only.
14. Previously processed rows (add) visible in the grid will be limited to the number of past months defined in the system parameter `Operations.StockInventoryTransactionHistory`.
15. Sort Inventory Add Transactions by Add Date (most recent to oldest).
16. Display an error if during the End Card Number calculation the quantity plus the sequence number (of the Begin Card Number) is greater than 7 digits of 9 (i.e. 9,999,999).

Developer Notes

1. Display as many rows as the screen allows before making the grid scrollable.
2. The system will calculate the card numbers for each EBT card as is needed. The first 8 characters are the same, the next 7 are sequential and the last can be calculated using the check digit algorithm.
3. MPSC wants the database field to be 20 characters to allow for future expansion of the card number. The UI will be set to 16 characters. This is the only place in the DFDDs that this will be mentioned.
4. Inventory Add Transactions are stored in `EBTStockStateAdjustment`. The `AdjustmentReasonCd = 'ADD'`

3.2 Adjustments


The State EBT Card Inventory Adjustments screen is available to account for EBT cards that for some reason never made it out of the state's hands (but were received) or for marking any card as "Destroyed". For example, cards may have been damaged during shipment to the state and subsequently destroyed. The state will want to account for these cards for auditing purposes.

> State EBT Card Inventory > Adjustments

All but Destroyed Cards Destroyed Cards

Inventory Adjustment Transactions							
	Begin Card Number	Quantity	End Card Number	Adjust Date	Reason	Explanation	
Add Row	>	80000358-0002450-8	50	80000358-0002499-8	11/15/2006	Damaged	
Remove Row		80000358-0001284-5	4	80000358-0001287-5	03/12/2004	Lost	
		80000358-0000038-4	6	80000358-0000043-5	04/15/2001	Other	

Control	Description
All but Destroyed Cards	Select this radio button for the data grid view that contains all transactions except those with an adjustment reason of "Destroyed".
	Type Radio Button
	Required Yes, unless Destroyed Cards is selected.
	DB Column Not Stored
Destroyed Cards	Select this radio button for the data grid view that contains all transactions with an adjustment reason of "Destroyed".
	Type Radio Button
	Required Yes, unless All but Destroyed Cards is selected.
	DB Column Not Stored
Add Row	Clicking the Add Row command button creates a new row in the data grid allowing the user to a complete the information about the adjustment.
	Type Command Button
	Hot Key Alt + A
Remove Row	Clicking the Remove Row command button removes the selected row from the data grid.
	Type Command Button
	Hot Key Alt + R
Inventory Adjustment Transactions	The data grid is used to record any inventory adjustments transactions.
	Type Data Grid

Control	Description			
Begin Card Number 	This is the beginning card number for this adjustment. This icon button allows the user to read the card number from the card reader.			
	Type	Text Box		
	Required	Yes		
	Length	Decimal 20,0		
	Validation	Numeric, Mask of 99999999-9999999-9		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateAdjustment.BeginCardNr		
Quantity	This is the quantity of the EBT cards that will be adjusted by this transaction. The system assumes that this identifies the next sequential card numbers. The system will calculate the numbers based on the card number algorithm.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 4, Mask of Z,ZZ9		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateAdjustment.AdjustmentQty		
End Card Number	This is the calculated ending card number for this adjustment transaction. Its purpose is to assist the user in verifying that the correct quantity was entered.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of 99999999-9999999-9		
	Display Only	Yes	Calculated	Yes
Adjust Date	This is the date that the EBT cards will be marked as adjusted to the system.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateAdjustment.AdjustmentDt		

Control	Description			
Reason	This is the reason that the card number will be given due to this adjustment. The Re-Add allows the state to re-add any cards that are not assigned to a participant back into state inventory.			
	Type	List Box		
	Required	Yes, Length of 10		
	DB Column	EBTStockStateAdjustment.AdjustmentReasonC d		
	Code ID	Adjustment Reason State This is the non-Editable code. Values include: Damaged Lost Stolen Other Re-Add Destroyed		
Explanation	This is for additional explanation about this adjustment.			
	Type	Text Box		
	Required	No		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateAdjustment.Explanation		

Business Rules
<ol style="list-style-type: none"> 1. On a save, the system processes only newly added rows (adjustments). 2. The card reader icon is only functional on newly added rows. The user clicks the icon to invoke the card reader to read the card and place the card number into the Begin Card Number of the newly added row. 3. Default the radio button selection to All but Destroyed Transactions. 4. Remove Row is disabled unless an added row has not been processed (saved). This allows a user to remove a row that they mistakenly entered. Once a row (transaction) has been processed, it cannot be removed. The Remove Row is only enabled when a newly added, unsaved row is selected. 5. Calculate the End Card Number based on the Begin Card Number with the quantity (assuming sequential numbering) and the check digit algorithm. 6. Display error if the Begin Card Number on any of the newly added rows is not valid according to the check digit algorithm. 7. Display an error if the any card number(s) of adjustment transactions with an adjustment reason of "Lost", "Stolen", "Damaged" or "Other" are not in the state inventory.

Business Rules
8. Display an error if the any card number(s) of adjustment transactions with an adjustment reason of "Re-Add" is assigned to a participant.
9. The card number(s) of newly added rows cannot overlap card number(s) from any other newly added row.
10. When an adjustment is successful, a history transaction for each card with the type of adjustment must be logged of its occurrence.
11. Previously processed rows (adjustments) are for informational purposes. The data is display-only.
12. Previously processed rows (adjustments) visible in the grid will be limited to the number of past months defined in the system parameter Operations.StockInventoryTransactionHistory.
13. Sort Inventory Adjustment Transactions by Adjust Date (most recent to oldest).
14. When All but Destroyed Cards is selected and Add Row is clicked, Reason defaults to blank. When Destroyed Cards is selected and Add Row is clicked, Reason defaults to "Destroyed".


Developer Notes
1. Display as many rows as the screen allows before making the grid scrollable.
2. The system will calculate the card numbers for each EBT card as is needed.
3. The state can do "Re-Add" adjustment transactions to any inventory as long as they have not been assigned to a participant (i.e. pull inventory back from a LA/Clinic so it can be re-shipped out).
4. The state can do Destroy adjustment transactions to any card numbers.

3.3 Shipments

The screen is used for the state shipment of EBT cards. Each row represents a sequential set of card numbers that has been shipped from the state's inventory to a local agency or clinic. These sets of card numbers are described by a Begin Card Number and the sequential quantity.

> *State EBT Card Inventory* > *Shipments*

Inventory Shipment Transactions									
	LA	Clinic	Begin Card Number	Quantity	End Card Number	Ship Date	Rec'd Date	Update By	Verify By
>	1 Fargo		80000358-0002450-8	150	80000358-0002599-3	10/15/2006	10/24/2006	jshark	
	2 City x	12 Clin	80000358-0002600-4	200	80000358-0002799-3	10/08/2006			
	1 Fargo		80000358-0002800-5	300	80000358-0003099-8	09/18/2006	09/22/2006	jshark	tshaw

Control	Description			
Add Row	Clicking the Add Row command button creates a new row in the data grid allowing the user to complete the information about a shipment to a local agency or clinic.			
	Type	Command Button		
	Hot Key	Alt + A		
Remove Row	Clicking the Remove Row command button removes the selected row from the data grid.			
	Type	Command Button		
	Hot Key	Alt + R		
Inventory Shipment Transactions	The data grid is used to record any shipments against this set of card numbers to a local agency or clinic.			
	Type	Data Grid		
LA	If the clinic is blank, then this is the local agency where the shipment was sent. If the clinic is not blank, this is the local agency where the clinic is located.			
	Type	List Box		
	Required	Yes, Display length of 8		
	DB Column	EBTStockStateShipment.LA_ID		
	Code ID	Local Agency table lookup LA ID and LA Name		
Clinic	This is the clinic where the shipment was sent.			
	Type	List Box		
	Required	No, Display length of 8		
	DB Column	EBTStockStateShipment.Cln_ID		
	Code ID	Clinic table lookup Clinic ID and Clinic Name		
Begin Card Number 	This is the beginning card number for this shipment record. This icon button allows the user to read the card number from the card reader into the Begin Card Number of a newly added row.			
	Type	Text Box		
	Required	Yes		
	Length	Decimal 20,0		
	Validation	Numeric, Mask of 99999999-9999999-9		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateShipment.BeginCardNr		

Control	Description			
Quantity	This is the quantity of the EBT cards that will be shipped by this transaction. The system assumes that this identifies the next sequential card numbers. The system will calculate the numbers based on the card number algorithm.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 8		
	Validation	Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateShipment.Quantity		
End Card Number	This is the calculated ending card number for this shipment transaction. Its purpose is to assist the user in verifying that the correct quantity was entered.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of 99999999-9999999-9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Ship Date	This is the date that the EBT cards will be marked as shipped.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateShipment.ShippedDt		
Rec'd Date	This is the date that the EBT cards will be marked as received by destination location.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of mm/dd/yyyy		
	Display Only	Yes	Calculated	No
	DB Column	EBTStockStateShipment.ReceivedDt		

Control	Description			
Update By	This is the user id of the user who updated the received information at the destination location.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	EBTStockStateShipment.UpdateStfpID		
Verify By	This is the user id of the user who verified the received information at the destination location.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	EBTStockStateShipment.VerfiyStfpID		

Business Rules
<ol style="list-style-type: none"> 1. Shipments may be to Local Agencies or to Clinics. Depending on the selected Local Agency, the Clinic list box should contain a blank (meaning shipment is to local agency) or a list of clinics based on whether they are setup as a Stock Inventory Point (setup in System Admin of Clinics). 2. A shipment row record is not allowed to be saved and an error messages is displayed when its range values: <ol style="list-style-type: none"> a. are not found to be in the state inventory's card begin to end card numbers. b. are found to overlap within other shipment row records unless the card status is a Re-Add. 3. The Rec'd Date, Updated By and Verified By are display-only and are based on system recorded receiving information at the local agency or clinic. 4. On a save, the system processes only newly added rows (shipments). 5. The card reader icon is only functional on newly added rows. The user clicks the icon to invoke the card reader to read the card and place the card number into the Begin Card Number of the newly added row. 6. Calculate the End Card Number based on the Begin Card Number with the quantity (assuming sequential numbering) and the check digit algorithm. 7. Display error if the Begin Card Number on any of the newly added rows is not valid according to the check digit algorithm. 8. Remove Row is disabled unless an added row has not been processed (saved). This allows a user to remove a row that they mistakenly entered. Once a row (transaction) has been processed, it can not be removed. The Remove Row is only enabled when a newly added, unsaved row is selected.

Business Rules

9. Inventory shipment transactions are only allowed for cards that are in the state's inventory (not assigned or shipped to local agencies or Clinics).
10. The card number(s) of newly added rows cannot overlap card number(s) from any other newly added row.
11. When a shipment transaction is successfully processed, a history transaction for each card must be logged of its occurrence.
12. Previously processed rows (shipments) are for informational purposes. The data is display-only.
13. Previously processed rows (shipments) visible in the grid will be limited to the number of past months defined in the system parameter Operations.StockInventoryTransactionHistory.
14. Lock on grid column of Clinic
15. Sort Inventory Shipment Transactions grid by Ship Date (most recent to oldest), LA and Clinic.

Developer Notes

1. Display as many rows as the screen allows before making the grid scrollable.
2. The system will calculate the card numbers for each EBT card as is needed.

4 LA/Clinic EBT Card Inventory

The LA or Clinic EBT Card Inventory sections are where the Local Agencies or Clinics administers its EBT card inventory. The functions found in this section will be available to the system when the System.FoodBenefitDeliveryMethod system parameter is set to "EBT".

These screens allow the tracking of EBT card inventory at the local agency or clinic level. This "serialized" inventory is tracked according to ranges of shipments (i.e. sets of card numbers).

There are screens that will allow the LA or Clinic to perform their inventory functions. The first is the receiving of EBT cards from the state inventory to the LA or Clinic inventory. The second is a summary that shows the aggregate status of the EBT cards from a LA or Clinic perspective. The third is allowing the LA/Clinic to make adjustments (i.e. lost, stolen, damaged) to their inventory while under their "ownership".

4.1 Shipment Receiving

This screen is used for the local agency or clinic personnel to acknowledge the receiving of a shipment from the state. The screen enforces the accounting of the entire shipment; therefore, local agency or clinic personnel must only update the receiving information when they are able to account for the entire shipment.

> LA/Clinic EBT Card Inventory > Shipment Receiving

Expected Shipments 10/08/2006 < 1 of 99 > Edit

Shipped Not Received
 Received Not Verified
 Received and Verified

Verify


Shipment Begin Card Number: 80000358-0002000-5
 Quantity Shipped: 200
 Local Agency: 2 Fargo Public Health
 Clinic: 12 Great Plains
 Received Date: 12/14/2006
 Updated By:
 Verified By:

Receiving Details						
	Begin Card Number	Quantity	End Card Number	Received	Not Recd Reason	Explanation
>	80000358-0002000-5	50	80000358-0002049-6	<input checked="" type="checkbox"/>		
	80000358-0002051-6	5	80000358-0002055-2	<input type="checkbox"/>	Damaged	Smashed by tire
	80000358-0002056-2	145	80000358-0002201-9	<input checked="" type="checkbox"/>		

Control	Description	
Edit	The Edit command button is used to edit the shipment record.	
	Type	Command Button
	Hot Key	Alt + T
Verify	The Verify command button is used to record receiving verification against the shipment record.	
	Type	Command Button
	Hot Key	Alt + V
Shipped Not Received	Selecting this radio button limits the shipment records to those that have been created by the state, but where no receiving information has been updated.	
	Type	Radio Button
	Required	No
	DB Column	NA
Received Not Verified	Selecting this radio button limits the shipment records to those that have been updated with receiving information, but have not had anyone verify them yet.	
	Type	Radio Button
	Required	No
	DB Column	NA
Received and Verified	Selecting this radio button limits the shipment records to those that have been updated with receiving information and have been verified.	
	Type	Radio Button
	Required	No
	DB Column	NA
Expected Shipments	This is the record selector for the shipment receipt records. It contains the shipment date of the shipment. The drop-down and spin control allow selection of current and historical range records.	
	Type	Record Selector
	Contents	Formatted as "mm/dd/yyyy"
	DB Column	EBTStockStateShipment.ShippedDt

Control	Description			
Shipment Begin Card Number	This is the beginning card number or the shipment.			
	Type	Text Box		
	Required	Yes		
	Length	NA		
	Validation	Numeric, Mask of 99999999-9999999-9		
	Display Only	Yes	Calculated	No
	DB Column	EBTStockStateShipment.BeginCardNr		
Quantity Shipped	This is the quantity of the shipment.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of 9,999		
	Display Only	Yes	Calculated	No
	DB Column	NA		
Local Agency	If the clinic is blank, then this is the local agency where the shipment was sent. If the clinic is not blank, this is the local agency ID where the clinic is located.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	LA table lookup LA ID and LA Name		
Clinic	If applicable, this is the clinic where the shipment was sent.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	Clinic Table lookup Clinic ID and Clinic Name		

Control	Description			
Received Date	This is the date that the shipment was received.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateShipment.ReceivedDt		
Updated By	This is the user id of the user updating the received information.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	EBTStockStateShipment.ModifyStfpID		
Verified By	This is the user id of the user verifying the received information.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	EBTStockStateShipment.VerifyStfpID		
Add Row	Clicking the Add Row command button creates a new row in the data grid allowing the user to complete the receiving information about the shipment.			
	Type	Command Button		
	Hot Key	Alt + A		
Remove Row	Clicking the Remove Row command button removes the selected row from the data grid.			
	Type	Command Button		
	Hot Key	Alt + R		
Receiving Details	The data grid is used to record the receiving details of a shipment.			
	Type	Data Grid		

Control	Description		
Begin Card Number 	This is the begin card number that this receipt detail row is detailing. This icon button allows the user to read the card number from the card reader.		
	Type	Text Box	
	Required	Yes	
	Length	Decimal 20,0	
	Validation	Numeric, Mask of 99999999-9999999-9	
	Display Only	No	Calculated No
	DB Column	EBTStockStateShipmentDetail.BeginCardNr	
Quantity	This is the quantity of the EBT cards that will be received/not received by this transaction. The system assumes that this identifies the next sequential card numbers. The system will calculate the numbers based on the card number algorithm.		
	Type	Text Box	
	Required	Yes	
	Length	Integer 8	
	Validation	Numeric, Mask of Z,ZZ9	
	Display Only	No	Calculated No
	DB Column	EBTStockStateShipmentDetail.EndCardNr	
End Card Number	This is the calculated ending card number for this addition transaction. Its purpose is to assist the user in verifying that the correct quantity was entered.		
	Type	Text Box	
	Required	NA	
	Length	NA	
	Validation	Mask of 99999999-9999999-9	
	Display Only	Yes	Calculated Yes
	DB Column	NA	
Received	This indicates whether this received detail row is received and placed into the local inventory.		
	Type	Check Box	
	Display Only	No	Calculated No
	DB Column	EBTStockStateShipmentDetail.ReceivedIn	

Control	Description			
Not Received Reason	This is the reason that the received detail row was not received.			
	Type	List Box, Display length of 18		
	Required	Yes, if the Received indicator is not checked		
	DB Column	EBTStockStateShipmentDetail.NotReceivedReasonCd		
	Code ID	Not Received Reason This is the non-Editable code. Values include: Damaged Lost Stolen Other		
Explanation	This is for additional explanation about the receiving detail row.			
	Type	Text Box		
	Required	No		
	Length	50, Display length of 25		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	EBTStockStateShipmentDetail.Explanation		

Business Rules
<ol style="list-style-type: none"> 1. Screen defaults to Shipped Not Received. The radio buttons are used to control the number of expected shipment records shown in the Expected Shipment drop-down. Generally speaking: <ol style="list-style-type: none"> a. Shipped Not Received – Used when user is planning to update system with a received shipment. b. Received Not Verified – Used when user is verifying the update that a peer user has made regarding a received shipment. c. Received and Verified – Used to research historical received shipments. 2. A user can only see the expected shipments to which he has local agency / clinic access. 3. For view selection of Shipped Not Received, the Edit button is enabled and the Verify By button is disabled. 4. The card reader icon is only functional on newly added rows. The user clicks the icon to invoke the card reader to read the card and place the card number into the Begin Card Number of the newly added row. 5. Calculate the End Card Number based on the Begin Card Number with the quantity (assuming sequential numbering) and the check digit algorithm. 6. Display error if the Begin Card Number on any of the grid rows is not valid according to the check digit algorithm. 7. Display error if any card number (from the grid rows entries) is not within the domain

Business Rules

- of the Expected Shipments' card numbers.
8. The card number(s) of a grid row cannot overlap card number(s) from any other grid row.
 9. Display an error if the Quantity Shipped is not equal to the total of the Quantity column in the Receiving Details grid.
 10. The Verify By button is enabled only when Received Date has been entered and the Verify By does not have a value (i.e. never verified).
 11. Clicking the Verified button will update the record's Verified By column with the user ID and switch the view to Received and Verified.
 12. For view selection of Received Not Verified, enable Verify button only when the record has been updated by user ID is not the current user. The Verify button is available without having to press the Edit button to be in edit mode. Policy requires that these must be different people.
 13. For view selection of Received and Verified, the Edit button is disabled and the Verify By button is disabled (view only screen).
 14. When a receiving transaction is successfully processed, a history transaction for each card must be logged of its occurrence (received or not received). A history transaction is not needed to record the shipment verification.
 15. When a shipment is verified, clear the corresponding (per the LA/Clinic) Inventory Summary fields on Currently On Order and Current Order Date. This ensures that the user does not forget to clear these 'order' fields when a shipment is processed.
 16. Sort Expected Shipments (most recent to oldest).
 17. Sort Receiving Detail grid rows by Begin Card Number.
 18. Display an error message if the Received checkbox is checked and a Not Received Reason is selected. These are mutually exclusive of each other.

Developer Notes

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4.2 Summary

This screen summarizes the current status of EBT cards at a local agency or clinic. It shows the current inventory, gives a sense of pace of usage, and gives users the ability to set a threshold that automatically generates warnings and alerts of a need for replenishment.

> LA/Clinic EBT Card Inventory > Summary

LA / Clinic

Current Inventory: 800
 Received Last 12 Months: 6,000
 Inventory Months: 1.6
 Replenishment Threshold
 Currently On Order
 Currently Order Date

Warning: EBT Cards are in need of replenishment for 1-5

Control	Description
Edit	The Edit command button is used to access summary data for the displayed local agency or clinic.
	Type Command Button
	Hot Key Alt + T
LA/Clinic	This is the local agency where inventory is managed, or if a clinic is displayed, the local agency where the clinic is located.
	Type List Box Format of Z9 xxxxxx for Local Agency records, Format of Z9 xxxxxx ' / ' Z9 xxxxxx for Clinic records, Length of 50
	Required Yes
	DB Column EBTStockLocalThreshold.LA_ID EBTStockLocalThreshold.Cln_ID
	Code ID Local Agency table lookup
Clinic	This is the clinic where inventory is managed. A blank clinic ID means that the inventory is managed at the local agency level.
	Type List Box
	Required No
	DB Column EBTStockLocalThreshold.Cln_ID
	Code ID Clinic table lookup

Control	Description			
Current Inventory	This is the current inventory quantity at the local agency or clinic level.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Received Last 12 Months	This is the quantity of the EBT cards that has been received over the last 12 months at the local agency or clinic level. This is to give the user a sense of the pace of usage of the EBT cards.			
	Type	Text Box		
	Required	NA		
	Length	8		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Inventory Months	This is the amount of current inventory expressed in months (based on pace of last 12 months received).			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of Z9.9		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Replenishment Threshold	This is the amount of inventory at the local agency or clinic level that is set to control when a warning alert occurs. It is compared to the Current Inventory + the Currently On Order.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 8		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	EBTStockLocalThreshold.ReplenishmentQty		

Control	Description			
Currently On Order	This is the amount of inventory at the local agency or clinic level that is currently on order. It is used to control the replenishment warning alert. When a replenishment warning alert occurs, the user would initiate an order and place the amount in this field. When a state shipment is received, this value would need to be decreased accordingly.			
	Type	Text Box		
	Required	Yes, if Current Order Date has a value		
	Length	Integer 8		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	EBTStockLocalThreshold.OrderQty		
Current Order Date	This is the date that the current order has been placed. This is for informational purposes only.			
	Type	Date Picker		
	Required	Yes, if Current On Order has a value		
	Display Only	No	Calculated	No
	DB Column	EBTStockLocalThreshold.OrderDt		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of this EBT card summary inventory 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	EBTStockLocalThreshold.ModifyStfpID + EBTStockLocalThreshold.ModifyDt		

Business Rules
<ol style="list-style-type: none"> 1. A user can only see the summary records to which he has local agency / clinic access (i.e. list boxes populated accordingly). The Clinic list box should contain a blank (meaning local agency) or a list of clinics based on whether they are setup as a Stock Inventory Point (setup in System Admin of Clinics). 2. Current Inventory is calculated by counting the EBT cards of the LA/Clinic whose latest status is Received or Re-Added (this means that they have not been received by the LA/Clinic but not assigned to any economic unit) 3. Received Last 12 Months is amount of inventory that has been shipped to the local agency / clinics in the last 12 months (from the current date).

Business Rules
<p>4. Inventory Months = Current Inventory / (Received Last 12 Months / 12) (e.g., Where Current Inventory is 800 and Received Last 12 Months is 6,000, then the Inventory Months would equal 1.6 months.)</p> <p>5. When Current Inventory + Currently On Order is less than Replenishment Threshold, then:</p> <ul style="list-style-type: none"> a. Display EBT cards Inventory Replenishments message on the screen. Format of message is defined in the Operation Overview DFDD. b. Display an EBT cards Inventory Replenishment alert in the operations area for the LA/Clinic user. <p>6. When Currently On Order has a value and the Current Order Date is greater than the current date and there are no Shipment records for this LA/Clinic whose Shipment Date is greater or equal to Current Order Date then Display a EBT cards Order alert in the operations area for the state user.</p> <p>7. The Last Modified data is empty until a user first accesses this screen. The reason is that a record does not actually exist at this point. When a user first accesses this screen, the system evaluates all inventory points and generates a summary record for every inventory point that the user has access to that does not already have a record generated. The Last Modified data will show on these records even though the user did not directly update the record on the screen. If the user saves, this is how the system creates summary records. Once the initial record is generated, then it only has its Last Modified data when a screen update is made.</p>

Developer Notes
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4.3 Adjustments

The LA / Clinic EBT Card Inventory Adjustments screen is available to account for EBT cards that for some reason were received (in state shipments) but never made it out of the local agency or clinic's hands (to an economic unit). For example, cards may have been damaged before assignment to an economic unit. The state will want to account for these cards for auditing purposes.

> LA/Clinic EBT Card Inventory > Adjustments

LA / Clinic

Inventory Adjustment Transactions						
	Begin Card Number	Quantity	End Card Number	Adjust Date	Reason	Explanation
>	80000358-0002450-8	3	80000358-0002452-5	11/15/2006	Damaged	Dropped hot coffee on them
	80000358-0001284-5	1	80000358-0001284-5	03/12/2004	Lost	Rachel looked all week
	80000358-0000038-4	6	80000358-0000043-1	04/15/2001	Other	Physical inventory

Control	Description			
LA / Clinic	This is the local agency and/or clinic where inventory is managed.			
	Type	List Box, Format of Z9 xxxxxx for Local Agency records, Format of Z9 xxxxxx ' / ' Z9 xxxxxx for Clinic records, Length of 70		
	Required	Yes		
	DB Column	FIStockLocalThreshold.LA_ID FIStockLocalThreshold.Cln_ID		
	Code ID	Local Agency / Clinic table Look up		
Add Row	Clicking the Add Row command button creates a new row in the data grid allowing the user to a complete the information about the adjustment.			
	Type	Command Button		
	Hot Key	Alt + A		
Remove Row	Clicking the Remove Row command button removes the selected row from the data grid.			
	Type	Command Button		
	Hot Key	Alt + R		
Inventory Adjustment Transactions	The data grid is used to record any inventory adjustments transactions.			
	Type	Data Grid		
Begin Card Number 	This is the beginning card number for this adjustment. This icon button allows the user to read the card number from the card reader.			
	Type	Text Box		
	Required	Yes		
	Length	Decimal 20,0		
	Validation	Numeric, Mask of 99999999-9999999-9		
	Display Only	No	Calculated	No
	DB Column	EBTStockLocalAdjustment.BeginCardNr		

Control	Description			
Quantity	This is the quantity of the EBT cards that will be adjusted by this transaction. The system assumes that this identifies the next sequential card numbers. The system will calculate the numbers based on the card number algorithm.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 4		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	EBTStockLocalAdjustment.AdjustmentQty		
End Card Number	This is the calculated ending card number for this addition transaction. Its purpose is to assist the user in verifying that the correct quantity was entered.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of 99999999-9999999-9		
	Display Only	Yes	Calculated	Yes
Adjust Date	This is the date that the EBT cards will be marked as adjusted to the system.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	EBTStockLocalAdjustment.AdjustmentDt		
Reason	This is the status that the card number will be given due to this adjustment.			
	Type	List Box		
	Required	Yes, Display length of 8		
	DB Column	EBTStockLocalAdjustment.AdjustmentReasonC d		
	Code ID	Adjustment Reason LA/CL This is the non-Editable code. Values include: Damaged Lost Stolen Other Re-Add (this is to undo a previous adjustment transaction i.e. lost but now found)		

Control	Description			
Explanation	This is for additional explanation about this adjustment.			
	Type	Text Box		
	Required	No		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	EBTStockLocalAdjustment.Explanation		

Business Rules
<ol style="list-style-type: none"> Users can only see the adjustment records to which they have local agency / clinic access (i.e. list boxes populated accordingly). The Clinic list box should contain a blank (meaning local agency) or a list of clinics based on whether they are setup as a Stock Inventory Point (setup in System Admin of Clinics). On a save, the system processes only newly added rows (adjustments). The card reader icon is only functional on newly added rows. The user clicks the icon to invoke the card reader to read the card and place the card number into the Begin Card Number of the newly added row. Calculate the End Card Number based on the Begin Card Number with the quantity (assuming sequential numbering) and the check digit algorithm. Display error if the Begin Card Number on any of the newly added rows is not valid according to the check digit algorithm. Display an error if any card number(s) of adjustment transactions with an adjustment reason of "Lost", "Stolen", "Damaged" or "Other" are not in the LA/Clinic's inventory. Display an error if any card number(s) of adjustment transactions with an adjustment reason of "Re-Add" are not reversal of a "Lost", "Stolen", "Damaged" or "Other" within this LA/Clinic's inventory. The "Re-Add" is the method to undo (or reverse) one of these previous transactions if it was entered by mistake. Remove Row is disabled unless an added row has not been processed (saved). This allows a user to remove a row that they mistakenly entered. Once a row (transaction) has been processed, it can not be removed. The Remove Row is only allowed for newly added rows. Inventory adjustment transactions are only allowed for cards that are in that LA or Clinic's inventory that have not been assigned to an economic unit. The card number(s) of newly added rows cannot overlap card number(s) from any other newly added row. When an adjustment transaction is successfully processed, a history transaction for each card with the type of adjustment must be logged of its occurrence. Previously processed rows (adjustments) are for informational purposes. The data is display-only. Previously processed rows (adjustments) visible in the grid will be limited to the number of past months defined in the system parameter Operations.StockInventoryTransactionHistory. Sort Inventory Adjustment Transaction rows by Adjust Date (most recent to oldest).

Developer Notes

1. Display as many rows as the screen allows before making the grid scrollable.
2. The system will calculate the card numbers for each EBT card as is needed.

5 EBT Card Ownership Lookup

The EBT Card Ownership Lookup screen will be available to the system when the System.FoodBenefitDeliveryMethod system parameter is set to "EBT".

This screen allows the review of an EBT card number's ownership history. This may be used to determine who currently owns a card or for research purposes.

> *Card Ownership Lookup*

EBT Card Number

Card Ownership History						
LA ID	Clinic ID	Family ID	EU Name	Transaction Date	Transaction Type	User ID
				02/08/2007 01:18 PM	Destroyed	klong
2	45	12352	John Smith	02/08/2007 01:15 PM	Setup	mjones
2				02/06/2007 09:37 AM	Add	kplace
2				02/03/2007 11:15 AM	Lost	kplace
2				01/27/2007 10:17 AM	Received	kplace
				01/23/2007 02:33 PM	Shipped	klong
				01/23/2007 02:04 PM	Add	klong

Control	Description		
Display	Clicking the Display command button causes the system to search for the card and provide the status.		
	Type	Command Button	
	Hot Key	Alt + I	
EBT Card Number	This is the EBT card number to display.		
	Type	Text Box	
	Required	Yes	
	Length	Decimal 20,0	
	Validation	Numeric, Mask of 99999999-9999999-9	
	Display Only	No	Calculated
	This icon button allows the user to read the card number from the card reader. If the card number is able to be read, perform the inquiry.		
	Type	Button	
	Hot Key	None	

Control	Description			
Card Ownership History	This grid traces the history of card ownership from an inventory transaction perspective.			
	Type	Read-only Data Grid		
LA ID	This is the LA ID of the transaction. A blank LA ID indicates that it is at the state level.			
	Format	Zero suppress	Calculated	No
	DB Column	EBTCardTransaction.LA_ID		
Clinic ID	This is the Clinic ID of the transaction.			
	Format	Zero suppress	Calculated	No
	DB Column	EBTCardTransaction.Cln_ID		
Family ID	This is the Family ID of the transaction. If this is displayed, the card was assigned out at the clinic.			
	Format	Zero suppress	Calculated	No
	DB Column	IncomeFamily.BFam_ID		
EU Name	This is the economic unit name of the transaction. If this is displayed, the card was assigned out at the clinic.			
	Format	Display length of 15	Calculated	No
	DB Column	IncomeFamily.Description		
Transaction Date	This is the date and time of the transaction.			
	Format	mm/dd/yyyy hh:mm AM/PM	Calculated	No
	DB Column	EBTCardTransaction.TransactionDt		
Transaction Type	This is the type of the transaction.			
	Format	Display length of 14	Calculated	No
	DB Column	EBTCardTransaction.EBTrxTypeCd		
User ID	This is the user ID of the WIC staff person who performed the transaction.			
	Format	Display length of 12	Calculated	No
	DB Column	EBTCardTransaction.ModifyStfpID		

Business Rules
<ol style="list-style-type: none"> <li data-bbox="203 1759 1408 1850">1. The grid should be populated with all transaction types that have no economic unit owner and, if applicable, the Setup, Hot Card, Reinstate, or Replace Setup transaction type of an economic unit owner. <li data-bbox="203 1860 1263 1894">2. Sort transaction grid by Transaction Date and Time (most recent to oldest).

Business Rules

3. In disconnected clinics, the displayed card ownership history is dependent upon the date of the transactions and the domain of the downloaded data. For example, archived transactions (based on system parameter ClinicServicesNumberOfDaysBeforeArchivingEBTData) and transactions for cards owned by clinics outside the downloaded data will not be displayed. The exception is that any card that is within the domain of the downloaded data will always have the latest transaction available regardless of its age.

Developer Notes

1. The Code name 'EBT Owner Txn' (non-editable values) contains the English names for the valid transaction types that can be displayed.

6 Non-Serialized Inventory

These screens are for Non-Serialized Inventory functionality.

6.1 Level

This screen allows the state, local agency or clinic to view the inventory of its non-serialized inventory items, such as pamphlets.

> *Non-Serialized Inventory* > *Level*

Update List

Local Agency 2 South Fork

Clinic 12 Any City

Category Pamphlets

Inventory Items							
	Item	Order By State	BF Related	Carry	Auto Order	Inv Count	Reorder Amt
>	Breastfeeding Basics 101	Yes	No	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	88	200
	Nutrition Education 101	Yes	No	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	150	50
	What is Peer Counseling?	No	No	<input checked="" type="checkbox"/>	<input type="checkbox"/>	0	0
	Breastfeeding Pads	Yes	Yes	<input type="checkbox"/>	<input type="checkbox"/>	0	0
	Breastfeeding Attachment	Yes	Yes	<input checked="" type="checkbox"/>	<input type="checkbox"/>	32	0
	Advanced Breastfeeding	Yes	Yes	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	12	300

Control	Description	
Update List	Clicking the Update List button allows the location to bring into their list any new items that were introduced by the state via the system admin screen.	
	Type	Command Button
	Hot Key	Alt + U
Local Agency	The id and name of the local agency.	
	Type	List Box
	Required	No
	DB Column	NonSerializedInventoryLevel.LA_ID
	Code ID	LocalAgency table lookup
Clinic	The id and name of the clinic.	
	Type	List Box
	Required	No
	DB Column	NonSerializedInventoryLevel.Cln_ID
	Code ID	Clinic table lookup

Control	Description			
Filter By Category	This filters the list by the category of the non-serialized inventory items.			
	Type	List Box		
	Required	Yes		
	DB Column	Not Stored		
	Code ID	NonSerialized Inventory table lookup		
Inventory Items	The active items within the non-serialized category.			
	Type	Data Grid		
	Display	No		
Inventory Items – Item	The description of the inventory item.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryType.Description		
Inventory Items – Order By State	Indicates whether the inventory item is able to be ordered from the state’s distribution center (Yes or No).			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryType.StateIn		
Inventory Items – BF Related	Indicates whether the inventory item is a Breastfeeding item related to participants. (Yes or No)			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryCategory.BFEquipmentIn		

Control	Description			
Inventory Items – Carry	Indicates the items that are carried at the selected clinic, local agency or state level.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryLevel.CarryIn		
Inventory Items – Auto Order	Indicates the clinic or local agency uses the system’s automated ordering functions (from the state’s distribution center).			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryLevel.AutoOrderIn		
Inventory Items – Inv Count	The inventory count of the item the clinic, local agency or state has on hand. It is for informational purposes and is entered manually by the user.			
	Type	Text Box		
	Required	Yes, if Carry is selected		
	Length	Integer 4		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryLevel.InventoryCountNr		
Inventory Items – Reorder Amt	The amount of the item the clinic or local agency usually reorders.			
	Type	Text Box		
	Required	Yes if Auto Order is selected.		
	Length	Integer 4		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryLevelDetail.ReorderNr		

Control	Description			
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of any item 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	NonSerializedInventoryLevel.ModifyStfpID + NonSerializedInventoryLevel.ModifyDt		

Business Rules
<ol style="list-style-type: none"> 1. The state record is when no Local Agency or Clinic is selected. This record has little functional use (only if state wants to update inventory level or use to document reorder amount). 2. If no Local Agency is selected, the Clinic drop-down is not enabled. When a Local Agency is selected, enable the Clinic drop-down. 3. The Filter By Category list box is populated with all active categories. 4. When the Update List button is pressed, the grid contents are displayed after the following process: <ol style="list-style-type: none"> a. Get all LA/Clinic item records for selected LA/Clinic. b. Compare LA/Clinic items to state table of non-serialized items (see SA Operations DFDD). For items not found in LA/Clinic, add the respective LA/Clinic record row to grid (defaulting fields to unchecked and zeroes). c. Display the grid (On saving, save changed records as well as new LA/Clinic item records)). 5. The Auto Order column is unchecked and disabled if the Category's Order By State is No or if the Carry column is unchecked. 6. Auto Order, Inv Count and Reorder Amt are cleared and disabled if the Carry indicator is unchecked. 7. The Reorder Amt is cleared and disabled if Auto Order indicator is unchecked. 8. The amount of each item currently in inventory is not automatically increased as shipments are received (received at the distribution center from vendors or received at clinics from the distribution center) or decreased as items are distributed (from distribution center to clinics or from clinics to participants). 9. When an item is deactivated at the state level (SA screen), automatically remove this from all LA/Clinic lists.

Developer Notes
<ol style="list-style-type: none"> 1. State record is when no local agency or clinic is selected. A local agency record is one with a local agency selected but no clinic. A clinic record is one with both the local agency and clinic selection.

6.2 Order

This screen allows the local agency or clinic supervisor to order non-serialized items, such as pamphlets, from the distribution center.

> *Non-Serialized Inventory* > *Order*

Order 2-12 01/15/2007 BF Pamphlets < 1 of 99 > + New Edit Delete

Local Agency 2 South Fork
 Clinic 12 Any City
 Order Date 01/15/2007
 Order Name BF Pamphlets
 Order Complete
 Filter By Pamphlets

Order Items						
	Category	Item	Inv Amt	Reorder Amt	Order Amt	Comment
>	Pamphlets	Breastfeeding Basics 101	50	200	200	Urgent
	Pamphlets	Nutrition Education 101	150			
	Pamphlets	Advanced Breastfeeding	76	300	300	

Control	Description
New	Clicking the New command button allows the user to enter a new order.
	Type Command Button
	Hot Key Alt + N
Edit	Clicking the Edit command button allows the fields to be edited.
	Type Command Button
	Hot Key Alt + T
Delete	Clicking the Delete command button causes the current order to be deleted.
	Type Command Button
	Hot Key Alt + D

Control	Description			
Order	This is the record selector for the orders placed by the clinic that have not been completed. It is a concatenation of the Local Agency, Clinic, Order Date and Order Name.			
	Type	Non-Editable Record Selector		
	Contents	Z9-ZZZZ9 MM/DD/YYYY Order Name (1-10 01/15/2007 BF Literature)		
	DB Column	NonSerializedInventoryOrder.LA_ID + NonSerializedInventoryOrder.Cln_ID + NonSerializedInventoryOrder.OrderDt + NonSerializedInventoryOrder.Name		
Local Agency	The id and name of the local agency.			
	Type	List Box		
	Required	Yes		
	DB Column	NonSerializedInventoryOrder.LA_ID		
	Code ID	LocalAgency table lookup		
Clinic	The id and name of the clinic.			
	Type	List Box		
	Required	No		
	DB Column	NonSerializedInventoryOrder.Cln_ID		
	Code ID	Clinic table lookup		
Order Date	The date the order was placed.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryOrder.OrderDt		
Order Name	The name of the order.			
	Type	Text Box		
	Required	Yes		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryOrder.Name		

Control	Description			
Order Complete	A checkbox indicating the order is complete and is ready to be fulfilled.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryOrder.CompleteIn		
Filter By	The category that the inventory items should be filtered by.			
	Type	List Box		
	Required	No		
	DB Column	Not Stored		
	Code ID	NonSerializedInventoryCategory table lookup		
Order Items	A data grid that displays the inventory items that are available to be ordered by the clinic.			
	Type	Data Grid		
	Display	No		
Order Items – Category	The category of the inventory items.			
	Type	Text Box		
	Required	NA		
	Length	20		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryCategory.Name		
Order Items – Item	The description of the inventory item.			
	Type	Text Box		
	Required	NA		
	Length	20		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryType.Description		

Control	Description			
Order Items - Inv Amt	The amount of inventory of the item.			
	Type	Text Box		
	Required	NA		
	Length	4		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryLevel.InventoryCountNr		
Order Items – Reorder Amt	The reorder amount of the item.			
	Type	Text Box		
	Required	NA		
	Length	4		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryLevel.InventoryReorder Nr		
Order Items - Order Amt	The quantity of the item being ordered.			
	Type	Text Box		
	Required	No		
	Length	Integer 4		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryOrderDetail.OrderQty		
Comment	The comment regarding an item being ordered.			
	Type	Text Box		
	Required	No		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryOrderDetail.Comment		

Business Rules
<ol style="list-style-type: none"> 1. The Order record selector is sorted by order date descending. 2. Only orders with an order date within the last year are displayed in the Order Record selector. 3. Only orders not fulfilled by the distribution center (no sent date) are displayed in the Order Record selector. 4. The order date defaults to current date but can be changed. 5. Display an error if the order date is not greater than or equal to the current date. 6. The Order Items grid consists of active items that are marked as Auto Order by the clinic or local agency. 7. If Filter By is blank, all active Categories and their corresponding active items are displayed in the grid. Default is blank. 8. Retrieved orders that are marked Complete will have the Edit and Delete command buttons disabled. 9. After saving an order that is marked Complete, an Inventory Order alert is placed in the operations area for the state user. 10. Sort order items by Category and Item 11. Display an error if the Order Complete checkbox is checked and there is not a minimum of one item that has an Order Amt.

Developer Notes
1.

6.3 Order Fulfillment

This screen is where the state's inventory manager indicates that an order placed by a clinic has been fulfilled (sent).

> *Non-Serialized Inventory* > *Order Fulfillment*

Ordered Items					
Category	Item	Inv Amt	Order Amt	Amt Sent	Comments
Pamphlets	Breastfeeding Basics 101	1,200	200	200	Urgent
Pamphlets	Advanced Breastfeeding	650	300	200	

Control	Description			
Edit	Clicking the Edit command button allows the editable fields to be updated.			
	Type	Command Button		
	Hot Key	Alt + T		
Order	This is the record selector for the orders placed by the clinics. It is a concatenation of the Local Agency, Clinic, Order Date and Order Name.			
	Type	Non-Editable Record Selector		
	Contents	99-999 MM/DD/YYYY Order Name (01-010 01/15/2007 BF Literature)		
	DB Column	NonSerializedInventoryOrder.LA_ID + NonSerializedInventoryOrder.Cln_ID + NonSerializedInventoryOrder.OrderDt + NonSerializedInventoryOrder.Name		
Unfulfilled	A radio button indicating that only unfulfilled orders with an order date within the last year are to be displayed.			
	Type	Radio Button		
	Required	No		
	DB Column	Not Stored		
Fulfilled	A radio button indicating that only fulfilled orders (value in Date Sent) with an order date within the last year are to be displayed.			
	Type	Radio Button		
	Required	No		
	DB Column	Not Stored		
All Orders	A radio button indicating that both fulfilled and unfulfilled orders with an order date within the last year are to be displayed.			
	Type	Radio Button		
	Required	No		
	DB Column	Not Stored		
Sent Date	The date the order was sent to the requesting clinic.			
	Type	Date Picker		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryOrder.SentDt		

Control	Description			
Order Sent	Indicates that the order has been sent to the clinic.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryOrder.SentIn		
Filter By	The category that the inventory items should be filtered by.			
	Type	List Box		
	Required	No		
	DB Column	NA		
	Code ID	NonSerializedInventoryCategory table lookup		
Ordered Items	A data grid that displays the inventory items that have been ordered by the selected clinic, as well as the amount of the items that have been sent and the amount on hand at the distribution center.			
	Type	Data Grid		
	Display	No		
Ordered Items – Category	The category of the non-serialized inventory items.			
	Type	Text Box		
	Required	NA		
	Length	20		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryCategory.Name		
Ordered Items – Item	The description of the inventory item.			
	Type	Text Box		
	Required	NA		
	Length	20		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryType.Description		

Control	Description			
Ordered Items – Inv Amt	The inventory amount of the item on hand at the distribution center.			
	Type	Text Box		
	Required	Yes		
	Length	4		
	Validation	Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryLevelDetail.InventoryOrderNr (from state level record)		
Ordered Items – Order Amt	The quantity of the item ordered by the clinic.			
	Type	Text Box		
	Required	NA		
	Length	4		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryOrderDetail.OrderQty		
Ordered Items – Amt Sent	The quantity of the item sent to the clinic.			
	Type	Text Box		
	Required	No		
	Length	Integer 4		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryOrderDetail.SentQty		
Comment	The comment regarding an item being ordered.			
	Type	Text Box		
	Required	No		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryOrderDetail.Comment		

Business Rules

1. When items are marked as sent, the actual inventory amount in the distribution center for the item fulfilled is not decremented. The item's inventory amount in the distribution center may be updated manually on this screen.
2. When the Order Sent checkbox is selected, the system populates the Sent Date field with current date, if no value is present.
3. Error when Order Sent checkbox is selected and no Sent Date is present.
4. After saving an order that is marked Sent, an Inventory Order Fulfilled alert is placed in the operations area for the LA/clinic user. The state user's Inventory Order alert in the operations area is removed.
5. Only orders with an order date within the last year are available on this screen.
6. The Order record selector is sorted by order date descending.
7. Ordered Items grid is populated with items that have an order amt greater than 0.
8. If Filter By is blank, all active Categories and their corresponding items are displayed in the grid.
9. The comment is displayed from the order but can be updated by this screen.
10. Sort order items by Category and Item
11. Display an error if the Sent Date is not equal to or greater than the Order Date.
12. Display an error if the Inv Amt column has a value for any item that does not have an existing State level item record that is marked as Carry. The Inv Amt does not update the state level until a save is completed. If there are multiple fulfillment records of the same type that are saved in the same unit of work, the system will update using the smallest number.

Developer Notes

1. The Order Amt cannot be edited on this screen. This is the amount of the item that the clinic ordered.
2. An order can be marked "Sent" without any values > 0 in the Amt Sent fields. It is possible that an order could be fulfilled without any items actually being sent. This field is used to indicate that an order no longer needs to be fulfilled.

6.4 Order Receiving

This screen allows the clinic supervisor to record the amount of non-serialized items that were received from the distribution center.

> *Non-Serialized Inventory* > *Order Receiving*

Order < 1 of 99 > Edit

Fulfilled Not Received Fulfilled and Received

Sent Date: 02/03/2007

Received Date:

Filter By:

Ordered Items						
Category	Item	Inv Amt	Order Amt	Amt Sent	Amt Rec'd	Comment
Pamphlets	Breastfeeding Basics 101	50	200	200	200	Urgent Enjoy
Pamphlets	Advanced Breastfeeding	32	300	200	200	

Control	Description	
Order	This is the record selector for the orders placed by the clinic within the last year. It is a concatenation of the Local Agency, Clinic, Order Date and Order Name.	
	Type	Non-Editable Record Selector
	Contents	99-999 MM/DD/YYYY Order Name (01-010 01/15/2007 BF Literature)
	DB Column	NonSerializedInventoryOrder.LA_ID + NonSerializedInventoryOrder.Cln_ID + NonSerializedInventoryOrder.OrderDt + NonSerializedInventoryOrder.Name
Edit	Clicking the Edit command button allows the editable fields to be updated.	
	Type	Command Button
	Hot Key	Alt + T

Control	Description			
Fulfilled Not Received	A radio button indicating the displayed orders have been fulfilled by the state but have not yet been received.			
	Type	Radio Button		
	Required	No		
	DB Column	NonSerializedInventoryOrder.SentDt NonSerializedInventoryOrder.ReceivedDt		
Fulfilled and Received	A radio button indicating the displayed orders have been fulfilled and recorded as received. These records are considered history records.			
	Type	Radio Button		
	Required	No		
	DB Column	NonSerializedInventoryOrder.ReceivedDt		
Sent Date	The date the order was sent to the clinic by the distribution center.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of mm/dd/yyyy		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryOrder.SentDt		
Received Date	The date the order was received by the clinic.			
	Type	Date Picker		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryOrder.ReceivedDt		
Filter By	The category that the inventory items should be filtered by.			
	Type	List Box		
	Required	No		
	DB Column	NA		
	Code ID	NonSerializedInventoryCategory table Lookup		
Ordered Items	A data grid that displays the inventory items that were on the order.			
	Type	Data Grid		
	Display	No		

Control	Description			
Ordered Items – Category	The category of the non-serialized inventory items.			
	Type	Text Box		
	Required	NA		
	Length	20		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryCategory.Name		
Ordered Items – Items	The description of the inventory item.			
	Type	Text Box		
	Required	NA		
	Length	20		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryType.Description		
Ordered Items – Inv Amt	The current number of the item on hand at the clinic.			
	Type	Text Box		
	Required	No		
	Length	Integer 4		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryLevelDetail.InventoryCountNr (from LA/Clinic record)		
Ordered Items – Order Amt	The quantity of the item ordered.			
	Type	Text Box		
	Required	NA		
	Length	4		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryOrderDetail.OrderQty		

Control	Description			
Ordered Items – Amt Sent	The quantity of the item that was sent by the distribution center.			
	Type	Text Box		
	Required	NA		
	Length	4		
	Validation	Mask of Z,ZZ9		
	Display Only	Yes	Calculated	No
	DB Column	NonSerializedInventoryOrderDetail.SentQty		
Ordered Items – Amt Rec'd	The quantity of the item received.			
	Type	Text Box		
	Required	Yes		
	Length	Integer 4		
	Validation	Numeric, Mask of Z,ZZ9		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryOrderDetail.ReceivedQty		
Comment	The comment regarding an item being ordered or updated during fulfillment.			
	Type	Text Box		
	Required	No		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	NonSerializedInventoryOrderDetail.Comment		

Business Rules
<ol style="list-style-type: none"> When items are marked as received, the actual inventory amount in the clinic for the item received is not incremented. The item's inventory amount may be updated manually on this screen. The Order record selector displays only those orders with an order date within the last year. The Order record selector is sorted by order date descending. Ordered Items grid is populated with items that have an order amt greater than 0. If Filter By is blank, all active Categories and their corresponding active items are displayed in the grid. When the Received Date is selected, the LA/clinic Inventory Order Fulfilled alert in the operations area is removed.

Business Rules

7. The comment is displayed from the order but can be updated by this screen.
8. Sort order by Category and Item (using display sequence numbers).
9. Display an error if the Received Date is not equal to or greater than the Sent Date.
10. Display an error if the Inv Amt column has a value for any item that does not have an existing LA/Clinic level item record that is marked as Carry. The Inv Amt does not update the LA/Clinic level until a save is completed. If there are multiple fulfillment records of the same type that are saved in the same unit of work, the system will update using the largest number.

Developer Notes

- 1.

7 Serialized Inventory

This screen allows for the clinic inventory manager to add serialized inventory items and view the current status of items already in clinic inventory. It also allows the state inventory manager to view the current status of items in clinic inventories. A special Search button allows the user to find a serial number regardless of inventory category or type. The history of the item can be viewed by selecting the Serial Number Link within the grid.

> *Serialized Inventory*

The screenshot shows a web interface for managing serialized inventory. It includes several filter fields: 'Serial Number' with a text input and a 'Search' button; 'Local Agency' set to '1 Anyagency'; 'Clinic' set to '10 Anyclinic'; 'Filter By Category' set to 'Breastpumps'; and 'Filter By Type' set to 'Medela Latina'. There are radio buttons for 'In Circulation' (unselected) and 'All' (selected). Below the filters is a table titled 'Serialized Inventory Items' with columns: Serial Number, Inv #, Status, Category, Type, LA ID, Clinic ID, and Rental Company. An 'Add Row' button is located to the left of the table.

Serialized Inventory Items							
Serial Number	Inv #	Status	Category	Type	LA ID	Clinic ID	Rental Company
C-115/969975	101	Retired	Breastpumps	Medela Latina	1	10	
C-134/283944	233	Issued	Breastpumps	Medela Latina	1	10	ACME Rentals
C-123/383955	302	Returned	Breastpumps	Medela Latina	1	10	
C-234/234786	104	Re-Added	Breastpumps	Medela Latina	1	10	

Control	Description			
Serial Number	If a search is desired, enter the serial number to search for.			
	Type	Text Box		
	Required	No		
	Length	50		
	Validation	None		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryItem.ProductSerialNr		
Search	Clicking the Search command button allows the serialized inventory to be searched for the entered serial number.			
	Type	Command Button		
	Hot Key	Alt + S		

Control	Description	
Local Agency	The name of the local agency.	
	Type	List Box
	Required	No
	DB Column	SerializedInventoryItem.LA_ID
	Code ID	LocalAgency table lookup
Clinic	The name of the clinic.	
	Type	List Box
	Required	Yes, if a Local Agency is selected
	DB Column	SerializedInventoryItem.Cln_ID
	Code ID	Clinic table lookup
Filter By Category	The category that the serialized items should be filtered by.	
	Type	List Box
	Required	No
	DB Column	Not Stored
	Code ID	SerializedInventoryCategory table lookup
Filter By Type	The type that the inventory items within the selected category should be filtered by.	
	Type	List Box
	Required	No
	DB Column	Not Stored
	Code ID	SerializedInventoryType table lookup
In Circulation	Indicates only those items that are not retired within the filtered category and type are displayed in the grid.	
	Type	Radio Button
	Required	No
	DB Column	Not Stored
All	Indicates all items within the filtered category and type are displayed in the grid.	
	Type	Radio Button
	Required	No
	DB Column	Not Stored
Add Row	Clicking the Add Row command button allows a new item to be added to the serialized inventory.	
	Type	Command Button
	Hot Key	Alt + A

Control	Description			
Serialized Inventory Items	The serialized inventory items within the category selected.			
	Type	Data Grid		
	Display	No		
Serialized Inventory Items - <History>	The word history is displayed. If clicked, the Serialized Inventory History Pop-up is displayed for the selected serial number row.			
	Type	Link		
Serialized Inventory Items - Serial Number	The Serial Number of the inventory item.			
	Type	Text Box		
	Required	Yes		
	Length	50, Grid display length of 15		
	Validation	None		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryItem.ProductSerialNr		
Serialized Inventory Items - Inv #	The inventory number assigned to the item at the clinic or state level.			
	Type	Text Box		
	Required	No		
	Length	Integer 5		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryItem.InventoryNr		

Control	Description			
Serialized Inventory Items - Status	The latest status of the serialized inventory item.			
	Type	Text Box		
	Required	NA		
	Length	50, display length of 10		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	SerializedInventoryItem.TransactionTypeCd		
	Code ID	Serialized Inventory Trns This code element is editable but these installed values are non-editable: New Issued Re-Added Returned Lost Stolen Damaged Other Retired		
Serialized Inventory Items - Category	The active serialized inventory categories.			
	Type	List Box		
	Required	Yes, 50, display length of 15		
	DB Column	Not Stored		
	Code ID	SerializedInventoryCategory table lookup		
Serialized Inventory Items - Type	The active serialized inventory types within category selected.			
	Type	List Box		
	Required	Yes, 100, display length of 20		
	DB Column	SerializedInventoryItem.SIT_ID		
	Code ID	SerializedInventoryType table lookup		
Serialized Inventory Items – LA ID	The local agency that the item is assigned to.			
	Type	Text Box		
	Required	NA		
	Length	Mask of Z9		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	SerializedInventoryItem.LA_ID		

Control	Description			
Serialized Inventory Items – Clinic ID	The clinic that the item is assigned to.			
	Type	Text Box		
	Required	NA		
	Length	Mask of Z9		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	SerializedInventoryItem.Cln_ID		
Serialized Inventory Items - Rental Company	The rental company that the item was rented from.			
	Type	Text Box		
	Required	No		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryItem.RentalCompany		

Business Rules
<ol style="list-style-type: none"> 1. Display error if Serial Number is not unique within the Category, Type, LA ID and Clinic ID. 2. After a serial number with complete and valid data is added to the grid, a hyperlink is available to the history screen. 3. The grid sort order is the Serial Number. 4. Default radio button to In Circulation. 5. The search function returns results based on the user’s security view permissions. 6. When a serial number is added using the add row, auto-populate the LA ID and Clinic ID based on the Local Agency and Clinic values. 7. The results of a Search will display items that have the entered serial number that are found within the inventories that the user has access (i.e. state - all inventories, clinic - their own inventories). Filters are ignored for these results. If the serial number is not found, the grid will be empty. Likewise, if the user changes a filter value (meaning that are not using the search feature), the system clears any value found in the serial number. 8. Clear the serial number field when an add row is done. 9. No search results should give a message.

Developer Notes
<ol style="list-style-type: none"> 1. When an item is added to the inventory, a Serialized Inventory Item History Record is added (transaction date is equal to current date, transaction is equal to “New,” Person ID is null, Due Date is null, Comment is null).

8 Serialized Inventory History Pop-Up

This pop-up screen is the history of the serialized inventory item. It displays all the transactions relating to the item. If the item is not currently assigned to a participant, transactions can be added to the history.

Serial Number: C-115/969975
 Type: Medela Latina
 Category: Breastpump

Add Row

Remove Row

Item History					
	Transaction Date	Transaction	Person ID	Due Date	Comment
	1/3/2007	Retired			Just too bad of shape
>	12/13/2006	Being Repaired		12/16/2006	
	12/12/2006	Returned	23456		Claims it was lost – Has been found
	11/01/2006	Issued	23546	12/31/2006	
	10/14/2006	Returned			
	10/10/2006	Being Cleaned		10/14/2006	Mr. Clean company
	09/27/2006	Returned	23856		
	08/03/2006	Issued	23856	9/30/2006	
	08/01/2006	New			

Close

Control	Description			
Serial Number	The Serial Number of the inventory item.			
	Type	Text Box		
	Required	NA		
	Length	50		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	SerializedInventoryItem.ProductSerialNr		

Control	Description			
Type	The serialized inventory type of the item within the displayed category.			
	Type	Text Box		
	Required	NA		
	Length	30		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	SerializedInventoryItem.SIT_ID		
Category	The serialized inventory category of the item.			
	Type	Text Box		
	Required	NA		
	Length	30		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	SerializedInventoryItem.SIT_ID SerializedInventoryType.SIC_ID		
Add Row	Clicking the Add Row command button allows a new transaction to be added to the item history grid.			
	Type	Command Button		
	Hot Key	Alt + A		
Remove Row	Clicking the Remove Row command button deletes a transaction from the item history grid.			
	Type	Command Button		
	Hot Key	Alt + R		
Item History	The history of the transactions associated with the serialized inventory item.			
	Type	Data Grid		
	Display Only	No		
Item History - Transaction Date	The date of the transaction.			
	Type	Date Picker		
	Required	Yes		
	Display Only	Yes, if item is assigned to a participant	Calculated	No
	DB Column	SerializedInventoryItemHistory.RecordedDt		

Control	Description			
Item History - Transaction	The transaction that occurred with the item (i.e. issued, retired).			
	Type	List Box		
	Required	Yes, 50, display Length of 20		
	DB Column	SerializedInventoryItemHistory.TransactionTypeCd		
	Code ID	Serialized Inventory Trns This code element is editable but these installed values are non-editable: New Issued Re-Added Returned Lost Stolen Damaged Other Retired		
Item History - Person ID	The ID of the participant to whom the item was assigned.			
	Type	Text Box		
	Required	NA		
	Length	9		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	SerializedInventoryItemHistory.Part_ID		
Item History - Due Date	The date that the item is due back in the clinic.			
	Type	Date Picker		
	Required	No		
	Display Only	Yes, if assigned to a participant	Calculated	No
	DB Column	SerializedInventoryItemHistory.DueDt		

Control	Description			
Item History - Comment	Comment regarding the item.			
	Type	Text Box		
	Required	No		
	Length	100, display length of 50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	SerializedInventoryItemHistory.Comment		
Close	Clicking the Close button closes the pop-up.			
	Type	Command Button		
	Hot Key	Alt + C		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the most recent transaction record are displayed.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of 'firstname lastname mm/dd/yyyy'		
	Display Only	Yes	Calculated	No
	DB Column	SerializedInventoryItemHistory.ModifyStfpID + SerializedInventoryItemHistory.ModifyDt		

Business Rules
<ol style="list-style-type: none"> 1. An item can only have one transaction row with a status of New. If a previously retired item is put back in the inventory, a status of re-added is used. 2. When a transaction is being added to the grid with the Add Row command button, the status of New and Issued are the only statuses not allowed as this is done automatically in other screens (i.e. Clinic Services). New and Issued will not show up in the dropdown list. 3. Rows in the grid that contain an item that has been assigned to a participant cannot be edited or removed on this screen. 4. Rows in the grid that contain a status of New cannot be removed. 5. When a transaction is being added to the grid with the Add Row command button, the Person ID field is disabled. 6. Disable the Add Row button if the most recent transaction shows that the item is assigned to a participant as Issued.

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