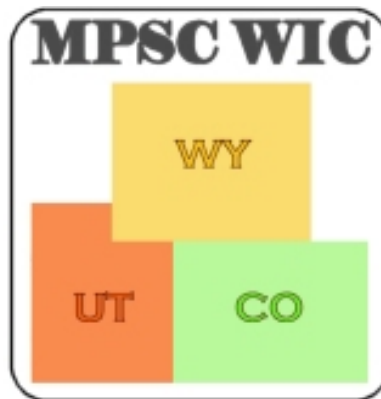

Mountain Plains States Consortium WIC System Project

DETAILED FUNCTIONAL DESIGN DOCUMENT SA 4 SYSTEM ADMINISTRATION SCHEDULER SCREENS

Presented to:



Revision Date: May 6, 2011

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CO Contract #WIC0601052
CIBER Project #CODPH00201

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Document Revisions

Revision Date	Updated By	Requested By	Description of Revision

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1 Master Schedule/Template

This screen operates in two modes; a mode for editing the master schedule and a mode for editing schedule templates. The modes can be switched by selecting either "Master Schedule" or "Template" from the Mode list box.

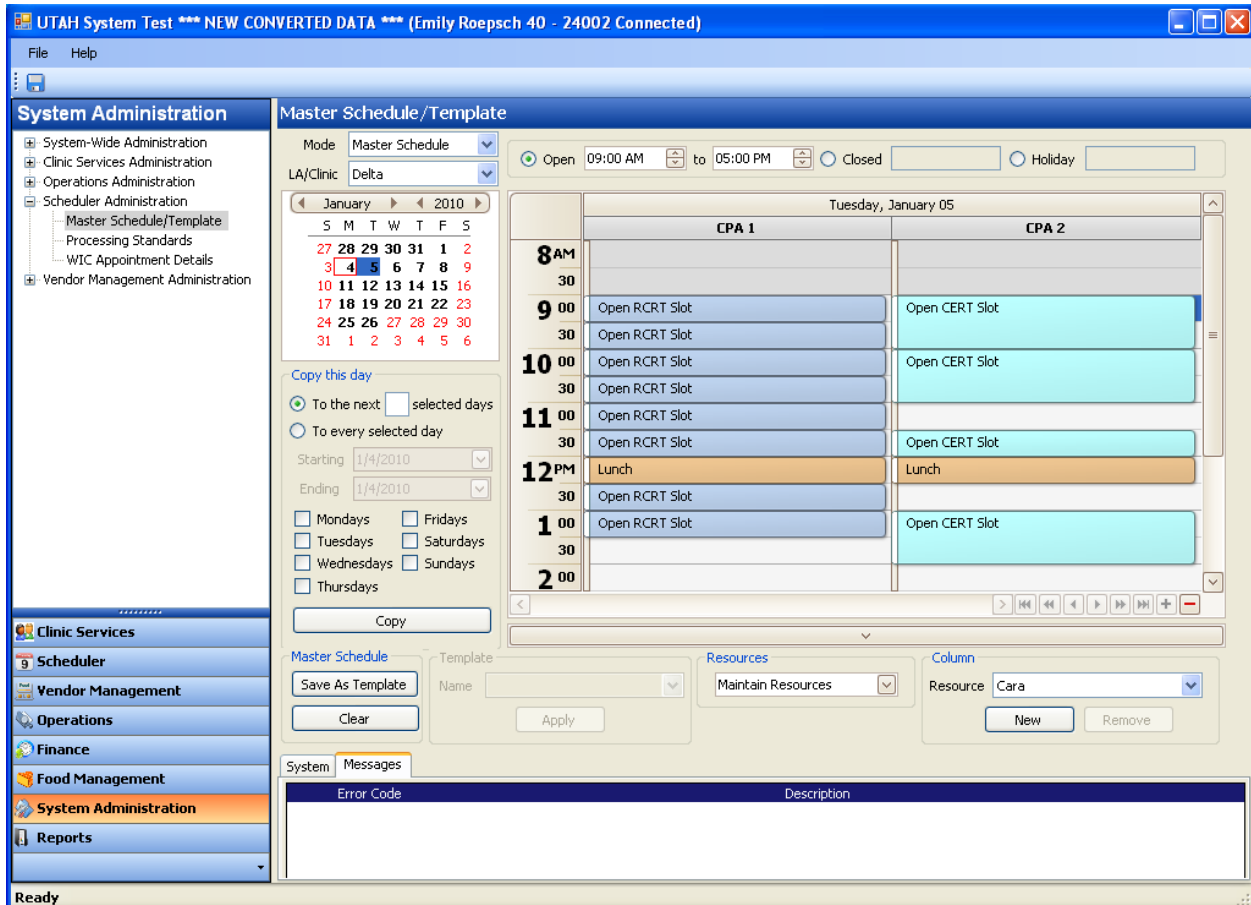
Master Schedule mode provides the ability to create flexible clinic master schedules. This includes defining hours of operation, definition of columns within the clinic master schedule, open appointment slots, and staff personal appointments.

Template mode provides the ability to define templates, which contain all the same things as a master schedule but are not associated with a particular day. The templates may be saved and applied to particular days. When in Template mode, the Calendar control and "Copy This Day" section are hidden and no date is shown in the schedule columns.

Examples of templates might be a template for Mondays with no Nutrition Education Classes and a template for Mondays with Nutrition Education classes.

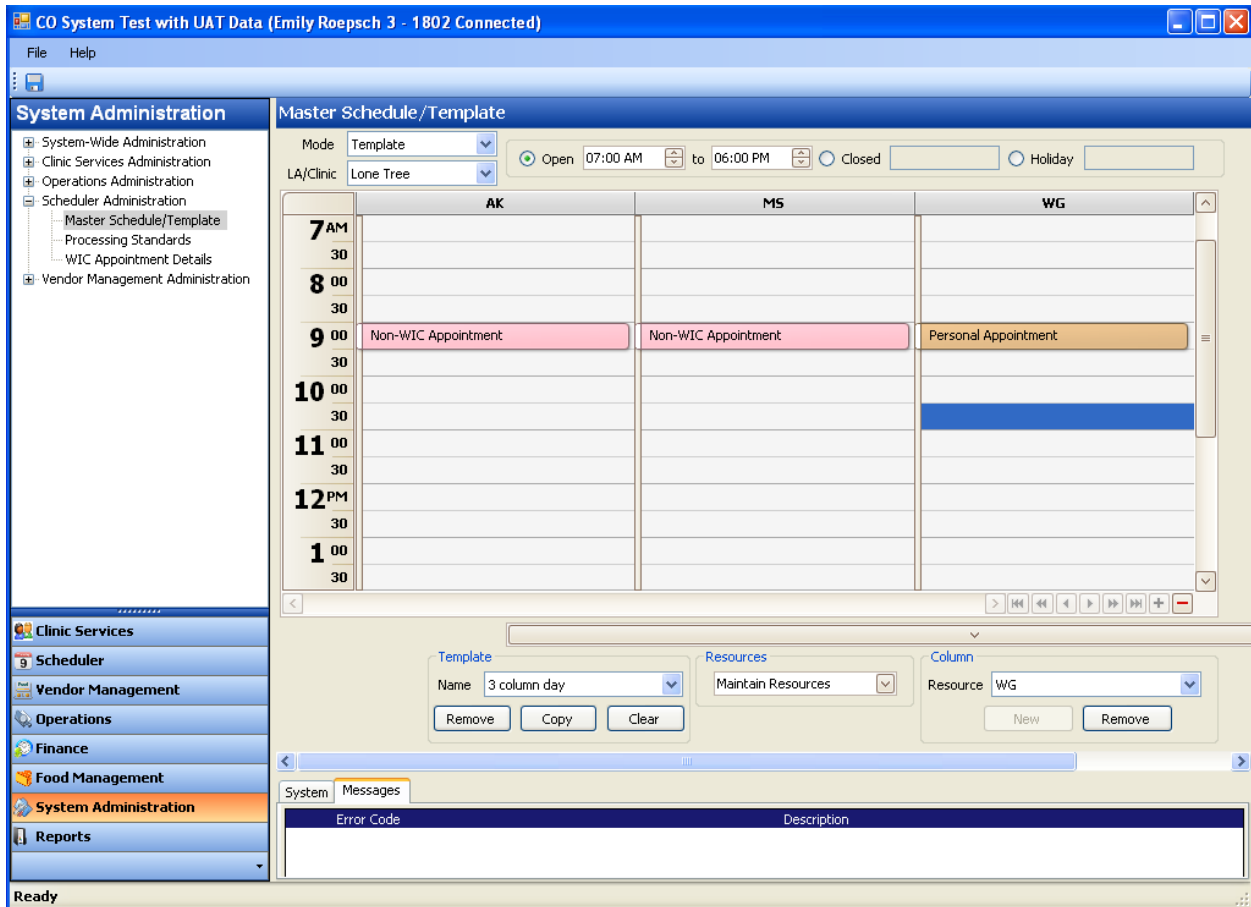
Master Schedule mode:

> Scheduler Administration > Master Schedule/Template



Template mode:

> Scheduler Administration > Master Schedule/Template







Control	Description
Mode	This list box is used to select which mode the screen should operate in. The two options are Master Schedule for maintaining the master schedule of a clinic and Template for maintaining templates for a clinic.
Type	List Box
Required	Yes
DB Column	Not Stored
Code ID	Schedule Mode This code element is non-editable. The installed values are: Master Schedule Template

Control	Description			
LA/Clinic	This is the local agency/clinic for which the Master Schedule is being made. Only local agencies/clinics that the user has access to are listed.			
	Type	List Box		
	Required	Yes		
	DB Column	MasterSchedule.Clinic_ID		
	Code ID	LocalAgency table lookup		
Open	The Open radio button indicates that the clinic is open on the date selected on the calendar.			
	Type	Radio button		
	Required	No		
	DB Column	MasterSchedule.ID		
Unlabeled (Open Time)	This is the time that the clinic opens on the date selected on the calendar.			
	Type	Spin Control		
	Required	Yes, if the Open radio button is selected.		
	Display Only	No	Calculated	No
	DB Column	MasterSchedule.OpenTime		
Unlabeled (Close Time)	This is the time that the clinic closes on the date selected on the calendar.			
	Type	Spin Control		
	Required	Yes, if the Open radio button is selected.		
	Display Only	No	Calculated	No
	DB Column	MasterSchedule.CloseTime		
Closed	The Closed radio button indicates that the clinic is closed for the full day on the date selected on the calendar.			
	Type	Radio button		
	Required	No		
	DB Column	MasterSchedule.ClosedReason		

Control	Description			
Unlabeled (Closed Reason)	This is the text to display when the clinic is closed.			
	Type	Text Box		
	Required	Yes, if the Close radio button is selected		
	Length	30		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	MasterSchedule.ClosedReason		
Holiday	The Holiday radio button indicates that the clinic is closed on the date selected on the calendar because of a holiday.			
	Type	Radio button		
	Required	No		
	DB Column	MasterSchedule.HolidayName		
Unlabeled (Holiday Name)	This is the text to display when the clinic is closed for a holiday.			
	Type	Text Box		
	Required	Yes, if the Holiday radio button is selected		
	Length	30		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	MasterSchedule.HolidayName		
Calendar (Master Schedule mode only)	A Calendar appears on the left side of the screen. The calendar enables the user to select a date for which they want to setup a Master Schedule.			
	Type	Calendar		
	Display Only	No		
Unlabeled (Schedule)	<p>In Master Schedule mode, the Schedule control displays the Master Schedule for the selected day(s).</p> <p>In Template mode, the Schedule control displays the selected template.</p> <p>Double clicking within the schedule control opens the Open Appointment Slot pop-up. The default Appointment Type is WIC Appointment. The Open Appointment Slot pop-up is where information about the open slot can be entered. See Open Appointment Slot pop-up for more information.</p>			
	Type	Schedule		
	Display Only	Yes		

Control	Description			
Time Ruler	The time ruler is displayed on the left side of the schedule. It shows the hours and minutes of the day. Each hour is broken down into time slots which can be adjusted by right clicking on the time bar and selecting a different interval from the context menu.			
	Format	Alphanumeric	Calculated	No
	DB Column	NA		
Unlabeled (Clinic Schedule Column Name)	The designated name associated with the column.			
	Format	Alphanumeric	Calculated	No
	DB Column	MasterScheduleColumn.DisplayText		
Displayed Columns Plus (+) Control	At the bottom right of the schedule control are several buttons that control how many Clinic Schedule Columns are shown at one time without scrolling. The Plus control increases the number of Clinic Schedule Columns that are shown at one time without scrolling.			
	Type	Button		
	Hot Key	None		
Displayed Columns Minus (-) Control	At the bottom right of the schedule control are several buttons that control how many Clinic Schedule Columns are shown at one time without scrolling. The Minus control decreases the number of Clinic Schedule Columns that are shown at one time without scrolling.			
	Type	Button		
	Hot Key	None		
Displayed Columns First (⏪) Control	At the bottom right of the schedule control are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The First control scrolls the Clinic Schedule Columns so that the first column is displayed at the far left of the Schedule window.			
	Type	Button		
	Hot Key	None		
Displayed Columns Previous Page (⏪) Control	At the bottom right of the schedule control are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Previous Page control scrolls the previous page of Clinic Schedule Columns into view.			
	Type	Button		
	Hot Key	None		

Control	Description	
Displayed Columns Previous () Control	At the bottom right of the schedule control are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Previous control scrolls the previous Clinic Schedule Column into view.	
	Type	Button
	Hot Key	None
Displayed Columns Next () Control	At the bottom right of the schedule control are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Next control scrolls the next Clinic Schedule Column into view.	
	Type	Button
	Hot Key	None
Displayed Columns Next Page () Control	At the bottom right of the schedule control are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Next Page control scrolls the next page of Clinic Schedule Columns into view.	
	Type	Button
	Hot Key	None
Displayed Columns Last () Control	At the bottom right of the schedule control are several buttons that control which Clinic Schedule Columns are shown when some of them are scrolled out of view. The Last control scrolls the Clinic Schedule Columns so that the last column is displayed at the far right of the Schedule window.	
	Type	Button
	Hot Key	None
Displayed Columns Select () Control	The Column Select control allows the user to determine whether or not an assigned column is visible in the Clinic Schedule when displayed above. By clicking this control, a selection box of columns is presented allowing for selection of multiple columns.	
	Type	List Box
	Required	No
	DB Column	MasterScheduleColumn.SR_ID
	Code ID	ScheduleResource table lookup

Control	Description				
Copy This Day - To the next	Selecting this radio button causes the selected day's schedule to be copied to the number of days specified when the Copy button is pressed. For example, if this radio button is selected, and 52 is entered into the following text box, and the Mondays checkbox is checked, then the selected day's scheduled is copied into the next 52 Mondays.				
	Type	Radio Button			
	Required	No			
	DB Column	NA			
Copy This Day - Unlabeled (next to the "To the next" radio button)	This text box is used to enter the number of days to copy the selected day's schedule to when the Copy button is pressed.				
	Type	Text Box			
	Required	Yes, if the To the next radio button is selected.			
	Length	2			
	Validation	Numeric, Mask of Z9 (Range 1-52)			
	Display Only	No	Calculated	No	
DB Column	NA				
Copy This Day - To every selected day	Selecting this radio button causes the selected day's schedule to be copied to every day specified within the Starting and Ending dates when the Copy button is pressed. For example, if this radio button is selected, and the Starting and Ending dates are 1/1/2008 and 3/31/2008 respectively, and the Mondays checkbox is checked, then the selected day's schedule is copied into every Monday between and including 1/2/2008 and 3/31/2008.				
	Type	Radio Button			
	Required	No			
	DB Column	NA			
Copy This Day - Starting	This date is the first date to copy the selected day's schedule into when the "To every selected day" radio button is selected and the Copy button is pressed.				
	Type	Date Picker			
	Required	Yes, if To every selected day is selected			
	Display Only	No	Calculated	No	
	DB Column	Not Stored			

Control	Description			
Copy This Day - Ending	This date is the last date to copy the selected day's schedule into when the "To every selected day" radio button is selected and the Copy button is pressed.			
	Type	Date Picker		
	Required	Yes, if To every selected day is selected		
	Display Only	No	Calculated	No
	DB Column	Not Stored		
Copy This Day - Mondays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Mondays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NA		
Copy This Day - Tuesdays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Tuesdays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NA		
Copy This Day - Wednesdays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Wednesdays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NA		
Copy This Day - Thursdays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Thursdays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NA		

Control	Description			
Copy This Day - Fridays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Fridays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NA		
Copy This Day - Saturdays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Saturdays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NA		
Copy This Day - Sundays	Selecting this checkbox causes the selected day's schedule to be copied to the number of Sundays specified by either the "To the next" or "To every selected day" radio button criteria when the Copy button is pressed.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NA		
Copy This Day - Copy	Clicking the Copy button causes the selected day's schedule to be copied to the days specified in the "Copy this day" group box.			
	Type	Command Button		
	Hot Key	None		
Master Schedule – Save As Template (Master Schedule mode only)	Master Schedule - Clicking the Save As Template button causes the Template Name Pop-Up to appear allowing the user to name the Template that is being saved.			
	Type	Command Button		
	Hot Key	None		
Master Schedule - Clear (Master Schedule mode only)	Clicking the Clear button causes all the schedule information for the currently selected day, to be cleared. All open slots and columns are removed when this button is pressed.			
	Type	Command Button		
	Hot Key	Alt + L		

Control	Description	
Template - Name (both modes)	Master Schedule mode - This list box is used to select a template to apply to the currently selected day's schedule. Template mode – This list box is used to select a template to work on.	
	Type	List Box
	Required	NA
	DB Column	TemplateSchedule.Name
	Code ID	TemplateSchedule table lookup
Template - Apply (Master Schedule mode only)	Clicking the Apply button causes the selected template to be applied to the currently selected day.	
	Type	Command Button
	Hot Key	Alt + Y
Template - Remove (Template mode only)	Clicking the Remove button deletes the currently selected template.	
	Type	Command Button
	Hot Key	None
Template - Copy (Template mode only)	Template - Clicking the Copy button causes the Template Name Pop-Up to appear allowing the user to name the copy of the Template that is being saved.	
	Type	Command Button
	Hot Key	None
Template – Clear Template mode only	Clicking the Clear button causes all the schedule information for the currently selected template, to be cleared. All open slots and columns are removed when this button is pressed.	
	Type	Command Button
	Hot Key	Alt + L
Resources – Unlabeled (Maintain Resources)	The Maintain Resources control displays the resources that can be associated with a column. Clicking within the Maintain Resources control opens the Maintain Resources pop-up. The Maintain Resources pop-up is where new resources can be added or existing ones edited. See Maintain Resources pop-up for more information.	
	Type	Maintain Resources
	Display Only	Yes

Control	Description	
Column – Resource	This list box is used to select the resource to be added to or removed from the column.	
	Type	List Box
	Required	Yes, before saving as a Template or before applying to a day
	DB Column	ScheduleResource.DisplayText
	Code ID	ScheduleResource table lookup
Column - New	Clicking the New button causes a pop-up to be displayed so that a new column can be added to the schedule for the selected day, to all dates in the future, or for a date range.	
	Type	Command Button
	Hot Key	NA
Column - Remove	Clicking the Remove button causes a pop-up to be displayed so that the currently selected column in the schedule can be removed from the schedule for the selected day, to all dates in the future, or for a date range. To select a column to remove, click anywhere on the column.	
	Type	Command Button
	Hot Key	None
Select All	Displayed at the bottom of the Displayed Columns Select Control list box. Clicking this button selects the check box for every available resource name displayed in the Displayed Columns Select Control list box.	
	Type	Command Button
	Hot Key	None
Unselect All	Displayed at the bottom of the Displayed Columns Select Control list box. Clicking this button de-selects the check box for every available resource name displayed in the Displayed Columns Select Control list box.	
	Type	Command Button
	Hot Key	None

Business Rules

Context Menu Rules

1. Right-clicking on the scheduler in an unassigned timeslot opens a context menu, giving the user the following option:
 - a. New Appointment: Creates a new open appointment slot and opens the Open Appointment Slot pop-up.
2. Right-clicking on an appointment or an open appointment slot opens a context menu, giving the user the following options:

Business Rules

- a. Open: Opens the Open Appointment Slot pop-up.
- b. Delete: Deletes the appointment from the scheduler.
3. Right-clicking on an open slot appointment, non-WIC appointment, or personal appointment, dragging to another timeslot and releasing the mouse opens a context menu, giving the user the following options:
 - a. Move: Moves the appointment from the original timeslot to the new timeslot.
 - b. Copy: Copies the appointment to the new timeslot.
 - c. Cancel: Returns to the scheduler.
4. Left-clicking on an open slot appointment, non-WIC appointment, or personal appointment, dragging to another timeslot and releasing the mouse moves the appointment from the original timeslot to the new timeslot.
5. Holding the Ctrl and Left-clicking on an open slot appointment, non-WIC appointment, or personal appointment, dragging to another timeslot and releasing the mouse copies the appointment to the new timeslot.

Clinic Closure Rules

6. No appointments can be scheduled (saved) for a day and time where a clinic closure is recorded.
7. Display message if appointments are already scheduled to times within the clinic closure.

Display of Appointments

8. Color code the open appointment slots based on their appointment type as described in the SC Scheduler - Appointments Screens DFDD.

General Business Rules

9. Don't allow the open time to be after the close time.
10. Limit the "selected days" number when copying days to 52. "52" applies to a selected day. Example: If Monday and Tuesday are selected, this means copying could be done for up to 52 Mondays and 52 Tuesdays.
11. On Copy, display error if Ending Date is >365 days from Today's Date.
12. Allow open appointment slots to be resized with the mouse to extend or shorten the duration.
13. Allow open appointment slots to be drag with the mouse to different times and columns.
14. Allow multiple open appointment slots to be selected at once by holding down the Ctrl key.
15. When Ctrl key is being used to select multiple days on the calendar display, disable fields in the Copy This Day group box.
16. Allow user to copy and paste open appointment slots by holding down the Ctrl key, selecting (with left-click) the slot or slots to copy and dragging the mouse to create copies and paste them to where the mouse button is released.
17. When an area on the schedule is double-clicked create an open appointment slot with a start time of the area clicked and open the Open Appointment Slot Pop-Up to edit the open slot.
18. When applying a template or copying days to a day that already has open appointment slots delete the current open slots, apply the open slots from copied day

Business Rules

- or the template.
19. Display an error if the user is trying to apply a template to a day with "real" appointments (as opposed to a day with only Open Slot appointments).
 20. When applying a template to a clinic day, only one template is applied to a single day. A clinic can only have one set of operating hours for a given day.
 21. When shortening the Open time of a day don't allow the change if there are appointments or open appointment slots that would no longer fit into the open time.
 22. In Master Schedule mode, when adding a column to a day or a set of days, the original template is not changed, the new column is added alphabetically within the existing columns and when the screen is refreshed, the column is sorted along with the other columns, alphabetically.
 23. In Template mode, display a confirmation message when Template - Remove button is selected.
 24. Display a confirmation message when Clear button is selected.
 25. Don't allow a column to be deleted until all appointments and open appointment slots have been removed from it.
 26. In Template mode, disable the Open, Closed, and Holiday fields unless at least one Template exists for the clinic.

Calendar Display (Master Schedule mode only)

27. Only display data for today and future dates.
28. When first displaying the Master Schedule for a LA/Clinic, display current month.
29. Allow the user to scroll through current and future months with the arrow buttons on either side of the month name.
30. Display days that are designated as "Open" in black, bolded font.
31. Display days that are designated as "Closed" in red, regular font.
32. Display a blue shaded box on the currently selected day(s).
33. Display a red outlined box on today's date.
34. Do not display any dates for which there is no data.

Developer Notes

1. Hide the Calendar and Copy This Day section when in template mode.
2. Hide the template Apply button when in template mode.
3. Hide the Master Schedule group box and its contents when in template mode.
4. Show the template Remove, Copy, and Clear buttons when in template mode.
5. Hide the template Remove, Copy, and Clear buttons when in Master Schedule mode.
6. Right-clicking on the time bar opens a context menu, giving the user the option to change the time interval and customize the time ruler's label, time zone, current time, and whether to use daylight savings time or not.

1.1 Open Appointment Slot Pop-Up

The Open Appointment Slot Pop-Up is used to add, edit, and delete open appointment slots to the master schedule or template. This pop-up is triggered when the user double-clicks on an open appointment area within the Schedule control.

Open Cert Slot

*Subject: Open Cert Slot

*Date: 7/30/2007

*Start Time: 11:00:00

*End Time: 11:30:00 30 minutes

*Column Name(s): Suzy Smith

*Appointment Type: WIC Appointment

*WIC Appt Type: Certification

Allow Overbooks

OK Cancel Delete

Non-WIC Appointment

*Subject: Non-WIC Appointment

*Date: 7/30/2007

*Start Time: 11:00:00

*End Time: 11:30:00 30 minutes

*Column Name(s): Suzy Smith

*Appointment Type: Non-WIC Appointment

WIC Appt Type:

Allow Overbooks

OK Cancel Delete

Control	Description			
Subject	The title of the open slot.			
	Type	Text Box		
	Required	Yes		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	Appointment.Subject		
Date	The Date of the open slot. Defaults to the selected date. In Master Schedule mode, the Date is available for selection. In Template mode, the Date is disabled and will appear blank.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	Appointment.StartTime		
Start Time	The Start Time of the open slot.			
	Type	Spin Control		
	Required	Yes		
	DB Column	Appointment.StartTime		
End Time	The End Time of the open slot.			
	Type	Spin Control		
	Required	Yes		
	DB Column	Appointment.EndTime		
Unlabeled (next to End Time)	The open slot duration, that is, the difference between the start and end times for the appointment.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of "99 minutes"		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		

Control	Description			
Column Name(s)	The designated name(s) for the column(s) associated with the open slot. By clicking the arrow, a selection box of available columns is presented allowing for selection of multiple columns.			
	Type	List Box		
	Required	Yes		
	DB Column	MasterScheduleColumn.SR_ID		
	Code ID	ScheduleResource table lookup		
Appointment Type	The Type of the open slot.			
	Type	List Box		
	Required	Yes		
	DB Column	Appointment.AppointmentTypeCd		
	Code ID	AppointmentType This code element is non-editable. The installed values are: WIC Appointment Personal Appointment Non-WIC Appointment Nutrition Education Class		
WIC Appt Type	The Type of WIC Appointment open slot.			
	Type	List Box		
	Required	Yes, if Appointment Type = WIC Appointment		
	DB Column	Appointment.WICAppointmentTypeCd		
	Code ID	WICAppointmentType This code element is editable but these installed values are non-editable: Certification Recertification		
Allow Overbooks	Checking this checkbox allows the appointment time period to be overbooked in a single column. If the checkbox is unchecked no other appointments can be created during the same time.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	Appointment.OverBookAllowIn		

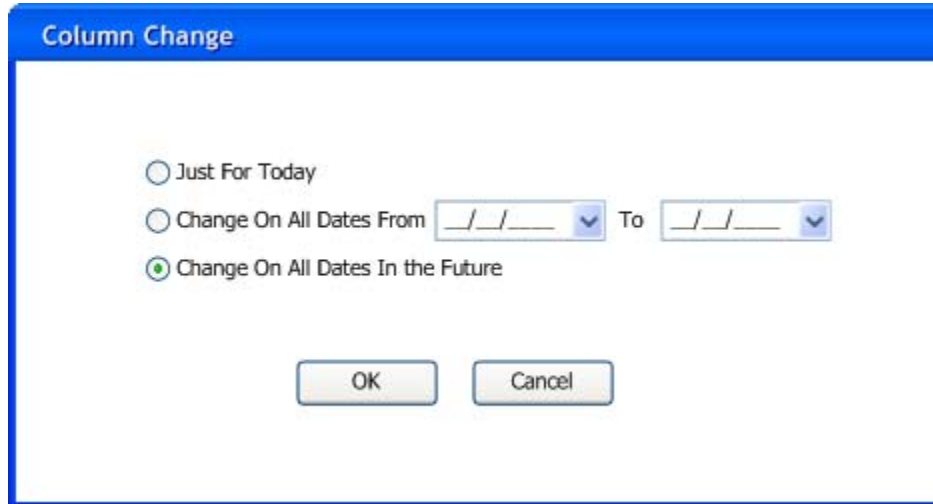
Control	Description	
OK	The OK button saves the open slot to the Master Schedule or Template if it is a new slot or saves any changes to the slot if it's an existing slot.	
	Type	Command Button
	Hot Key	Alt + O
Cancel	The Cancel button causes the open slot to not be saved to the Master Schedule or Template if it is a new slot or abandons the changes to the slot if it's an existing slot.	
	Type	Command Button
	Hot Key	Alt + L
Delete	The Delete button allows the user to delete the open slot from the Master Schedule or Template.	
	Type	Command Button
	Hot Key	None

Business Rules
<ol style="list-style-type: none"> When a WIC appointment type is selected, automatically fill in the Subject and pop-up title with the text "Open" plus the WIC appointment type abbreviation plus the text "Slot". When a Nutrition Education Class is selected, automatically fill in the Subject and pop-up title with the text "Open Nutrition Education Class Slot". When a Personal appointment is selected, automatically fill in the Subject and pop-up title with the text "Personal Appointment." When a Non-WIC appointment is selected, automatically fill in the Subject and pop-up title with the text "Non-WIC Appointment." If the appointment type is a WIC appointment, disable the "Allow Overbooks" checkbox and default it to checked. WIC appointments can always be overbooked. If the appointment type is a Nutrition Education Class, Personal Appointment, or Non-WIC appointment enable the "Allow Overbooks" checkbox. Automatically default the duration of open WIC Appointment slots to the length defined in the WIC Appointment Details screen for the WIC Appointment Type selected. If no length is defined, default to 5 minutes. Automatically default the duration of open Nutrition Education Class, Personal, and Non-WIC Appointments to the clinic appointment interval that has been selected. Display a warning if an open slot is added to a column with an associated appointment type that is different than the appointment type of the open slot. Start Time cannot be equal to or greater than End Time.

Developer Notes
<ol style="list-style-type: none"> Start time cannot be greater than end time. Display error.

1.2 Column Change Pop-Up

The Column Change Pop-Up allows the user to determine the period of time that a column is added or removed from the schedule.



Control	Description			
Just For Today	Selecting this radio button causes the column change to affect only the selected day's schedule.			
	Type	Radio Button		
	Required	No		
	DB Column	NA		
Change on All Dates From/To	Selecting this radio button causes the column change to affect dates within the date range.			
	Type	Radio Button		
	Required	No		
	DB Column	NA		
Change on All Dates From/To (first)	This date is the beginning of the date range for the column change.			
	Type	Date Picker		
	Required	Yes, if Change On All Dates From/To is selected		
	Display Only	No	Calculated	No
	DB Column	Not Stored		

Control	Description			
Change On All Dates From/To (second)	This date is the end of the date range for the column change.			
	Type	Date Picker		
	Required	Yes, if Change On All Dates From/To is selected		
	Display Only	No	Calculated	No
	DB Column	Not Stored		
Change On All Dates In the Future	Selecting this radio button causes the column change to affect all dates in the future.			
	Type	Radio Button		
	Required	No		
	DB Column	NA		

Business Rules

1. The first Change On All Dates From/To cannot be greater than the second Change On All Dates From/To.

Developer Notes

- 1.

1.3 Maintain Resources Pop-Up

The Maintain Resources Pop-Up is used to add and edit resources that are associated with columns in the master schedule/template. This pop-up is triggered when the user clicks on the Unlabeled (Maintain Resources) control.

The screenshot shows a 'Resources' dialog box with a 'Column' tab. The 'Maintain Resources' dropdown is set to 'CPA'. The 'Resource' dropdown is set to 'CPA 1'. The '*Name' field contains 'CPA 1'. The 'Type', 'Language', and 'Staff Person' fields are empty dropdown menus. The 'New' and 'Close' buttons are visible at the bottom.

Control	Description			
Resource	This list box is used to select a resource to assign a column in the schedule.			
	Type	List Box		
	Required	No		
	DB Column	ScheduleResource.DisplayText		
	Code ID	ScheduleResource table lookup		
Name	This text box is used to enter a resource name to display for a column in the schedule. If a Staff Person is associated with the column, the staff person's name is automatically entered into this textbox however it may still be changed.			
	Type	Text Box		
	Required	Yes		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	ScheduleResource.DisplayText		
Type	This list box is used to associate a WIC appointment type, such as Certification or Recertification, with a resource. If an appointment with a type other than that associated with the resource is later added to the column, a warning is displayed.			
	Type	List Box		
	Required	No		
	DB Column	ScheduleResource.AppointmentTypeCd		
	Code ID	WICAppointmentTypeCd This code element is editable but these installed values are non-editable: Certification Recertification		
Language	This list box is used to associate a language with a resource.			
	Type	List Box		
	Required	No		
	DB Column	ScheduleResource.SpokenLanguageCd		
	Code ID	Spoken Language This code element is editable but this installed value is non-editable: Spanish		

Control	Description	
Staff Person	This list box is used to associate a staff person with a resource. When a staff person is selected the staff person's name is automatically entered into the Name textbox.	
	Type	List Box
	Required	No
	DB Column	ScheduleResource.Stfp_ID
	Code ID	StaffPerson table lookup
New	Clicking the New button causes the value to be displayed in the Column – Resource control so that a new column can be added for the resource.	
	Type	Command Button
	Hot Key	Alt+N
Close	Clicking the Close button causes the Maintain Resources pop-up to close. The user returns to the Master Schedule/Template screen.	
	Type	Command Button
	Hot Key	Alt+C

Business Rules

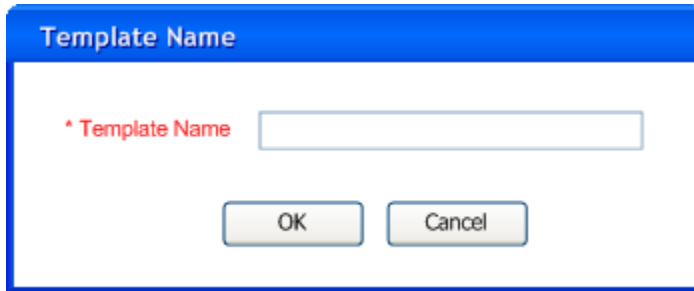
1. Only active staff members of the current clinic are displayed in the Staff Person list box.
2. If the Type drop down value selected is blank then null the column value in the record.
3. Default Name to <Available Resource> when a new resource is created.
4. Display a confirmation message box when the New button is clicked with the message "Adding a new resource requires the system to immediately save your work. The new resource cannot be deleted. Are you sure you want to add a new resource and save your work?" If "Yes", then create a new resource. Save this and other changes to the database. If "No", then return the user to the Master Schedule/Template screen. Do not create a new resource. Do not save.
5. Allow the pop-up to close, if the user clicks on the Master Schedule/Template screen outside of the pop-up.
6. If there are still required fields that have not been satisfied when the pop-up is closed, display an error message and disable all other functions on the screen except the Maintain Resources control.
7. Update Resource list box whenever Name text box is changed.

Developer Notes

- 1.

1.4 Template Name Pop-Up

The Template Name Pop-Up allows the user to name the Template that is being saved.



Control	Description			
Template Name	The name of the template to save.			
	Type	Text Box		
	Required	Yes		
	Length	100		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	TemplateSchedule.Name		
OK	Clicking the OK command button records the template name and and returns the user to the Master Schedule/Template screen.			
	Type	Command Button		
	Hot Key	Alt + O		
Cancel	Clicking the Cancel command button closes the Template Name pop-up and returns the user to the Master Schedule/Template screen.			
	Type	Command Button		
	Hot Key	Alt + L		

Business Rules
1.

Developer Notes
1.

2 Processing Standards

Processing standards are used to ensure that applicants to the WIC Program are being scheduled within state specified guidelines. The guidelines vary depending on participant category, whether the applicant is migrant or homeless, and if they are a walk-in. The state has the option of making the processing standards more restrictive than federal policy by incorporating age break downs also. The state has the option of extending specific processing standards by 5 days. The processing standards are used when a WIC Certification appointment is being made for an applicant.

> Scheduler Administration > Processing Standards

Control	Description	
Record Dates	This is the record selector for the Processing Standards records. It contains the recorded date, which is today's date. The drop-down and spin control allow selection of historical Processing Standards records. When the New button is clicked, this date defaults to today's date. It cannot be updated by the user.	
	Type	Record Selector Non-Editable
	Contents	Formatted dates of "mm/dd/yyyy"
	DB Column	ClinicProcessingStandard.RecordedDt
New	Clicking the New button causes a new state processing standards record to be created.	
	Type	Command Button
	Hot Key	Alt + N

Control	Description			
Edit	Clicking the Edit button allows the user to edit the fields on the screen.			
	Type	Command Button		
	Hot Key	Alt + T		
Effective Date	This date is the date that the processing standards will be effective. This allows for policy changes to be incorporated into the system at a future date. This date must be equal to or greater than today's date.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	ClinicProcessingStandard.EffectiveDt		
End Date	This is a system filled date. It is the last day on which the processing standards are effective. This is filled in when a new processing standard record is created and an Effective Date captured. The end date is the Effective Date of the new record minus 1 day.			
	Type	Text Box		
	Required	Yes, if new processing standard record created with Effective Date		
	Length	NA		
	Validation	Mask of mm/dd/yyyy		
	Display Only	Yes	Calculated	Yes
	DB Column	ClinicProcessingStandard.EndDt		
Add Row	Clicking the Add Row button causes another row to be added to the Processing Standards data grid.			
	Type	Command Button		
	Hot Key	Alt + A		
Remove Row	Clicking the Remove Row button causes the selected row to be removed from the Processing Standards data grid.			
	Type	Command Button		
	Hot Key	Alt + R		
Processing Standards	This is the data grid where processing standards are defined by participant category.			
	Type	Data Grid		
	Display	Yes		

Control	Description	
Category	The selected participant category.	
	Type	List Box
	Required	Yes
	DB Column	ProcessingStandardCategory.ParticipantTypeCd
	Code ID	Part Type Code This code element is non-editable. The installed values are: Infant Pregnant Child Not Breastfeeding Breastfeeding
Beg Age	The beginning age for the selected participant category. This column is only completed by user for the infant category. This allows state policy to be enforced even more granularly than federal policy.	
	Type	List Box
	Required	Yes, if Infant category is selected.
	DB Column	ProcessingStandardCategory.BeginningAgeCd
	Code ID	Infant Age This code element is non-editable. The installed values are: 0 months 1 month 2 months 3 months 4 months 5 months 6 months 7 months 8 months 9 months 10 months 11 months 12 months

Control	Description	
End Age	The ending age for the selected participant category. This column is only completed by user for the infant category. This allows state policy to be enforced even more granularly than federal policy.	
	Type	List Box
	Required	Yes, if Infant category is selected.
	DB Column	ProcessingStandardCategory.EndingAgeCd
	Code ID	Infant Age This code element is non-editable. The installed values are: 0 months 1 month 2 months 3 months 4 months 5 months 6 months 7 months 8 months 9 months 10 months 11 months 12 months
H/M	This indicates if the standard includes homeless/migrant applicants or not.	
	Type	List Box
	Required	Yes
	DB Column	ProcessingStandardCategory.HomelessorMigrantCd
	Code ID	YesNo
Walk-In	This indicates if the standard includes applicants who are walk-ins or not.	
	Type	List box
	Required	Yes
	DB Column	ProcessingStandardCategory.WalkInCd
	Code ID	YesNo

Control	Description			
Days Allowed	This indicates the number of days allowed from application date to appointment date that is assigned to the participant category, taking into account homeless/migrant and walk-in. The application date is counted as the first day of the period of Days Allowed.			
	Type	List Box		
	Required	Yes		
	DB Column	ProcessingStandardCategory.DaysAllowedCd		
	Code ID	Processing Standard Days This code element is non-editable. The installed values are: 10 Days 15 Days 20 Days		
Extend By 5 Days	This indicates if the Days Allowed can be extended by 5 days for the participant category and associated characteristics.			
	Type	List Box		
	Required	Yes		
	DB Column	ProcessingStandardCategory.DaysAllowedExtendedCd		
	Code ID	YesNo		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the processing standards record are displayed.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of 'firstname lastname mm/dd/yyyy'		
	Display Only	Yes	Calculated	No
	DB Column	The most recent of ClinicProcessingStandard.ModifyStfpID + ClinicProcessingStandard.ModifyDt OR ProcessingStandardCategory.ModifyStfpID ProcessingStandardCategory.ModifyDt		

Business Rules

1. Only one set of processing standards can be effective at one time. The time periods covered cannot overlap.
2. Display error if infant age ranges overlap.

Business Rules

3. Display error if Category, Beginning Age, Ending Age, Homeless/Migrant and Walk-In values are not unique for the record date.
4. Sort the records by Effective Date.
5. Disable Edit button if the Effective Date of the record is a date in the past (date less than today's date).

Developer Notes

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3 WIC Appointment Details

WIC Appointment details are defined at the clinic level. The default duration is used to help staff estimate the necessary length of time to schedule for a WIC appointment. The shortened name is displayed when a longer name is not preferable because of space limitations.

> *Scheduler Administration* > *WIC Appointment Details*

Local Agency/Clinic

WIC Appointment Details			
	WIC Appointment Type	Abbreviation	Default Duration
>	Certification	Cert	30
	Recertification	Recert	10

Control	Description						
Local Agency/Clinic	This is the record selector for the WIC appointment details records. It contains the local agency/clinics to which the user has access.						
	<table border="1"> <tr> <td>Type</td> <td>Record Selector</td> </tr> <tr> <td>Contents</td> <td>Local agency/clinic</td> </tr> <tr> <td>DB Column</td> <td>AppointmentDuration.Cln_Id</td> </tr> </table>	Type	Record Selector	Contents	Local agency/clinic	DB Column	AppointmentDuration.Cln_Id
Type	Record Selector						
Contents	Local agency/clinic						
DB Column	AppointmentDuration.Cln_Id						

Control	Description				
WIC Appointment Details - WIC Appointment Type	Each row displays an active WIC appointment type for the state.				
	Type	Text Box			
	Required	Yes			
	Length	50			
	Validation	NA			
	Display Only	Yes	Calculated	No	
	DB Column	AppointmentDuration.AppointmentTypeCd			
WIC Appointment Details - Abbreviation	This allows an abbreviated name for a WIC appointment type to be designated. The abbreviated name is utilized when space is limited. This usage is described in business rules.				
	Type	Text Box			
	Required	Yes			
	Length	8			
	Validation	NA			
	Display Only	No	Calculated	No	
	DB Column	AppointmentDuration.ShortName			

Control	Description			
WIC Appointment Details – Default Duration	This is a listing of default durations for the type of WIC appointment in minutes. This information is used to set default durations for various types of WIC appointments when they are created.			
	Type	List Box		
	Required	Yes		
	DB Column	AppointmentDuration.ExpectedDuration		
	Code ID	ExpectedDurationCd This code element is non-editable. The installed values are: 5 10 15 20 25 30 35 40 45 50 55 60		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the appointment duration record are displayed.			
	Type	Text Box		
	Required	NA		
	Length	NA		
	Validation	Mask of 'firstname lastname mm/dd/yyyy'		
	Display Only	Yes	Calculated	No
	DB Column	AppointmentDuration.ModifyStfpID + AppointmentDuration.ModifyDt		

Business Rules

1. Each time this screen is displayed, retrieve all active WIC appointment types.
2. Add rows to the grid for any new WIC appointment types and set the default duration to 5 minutes.
3. Remove any rows from the grid of inactive WIC appointment types.
4. The WIC Appointment Details – Abbreviation values will default to the list management code value.
5. Sort the grid alphabetically by WIC Appointment Type.

Developer Notes
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