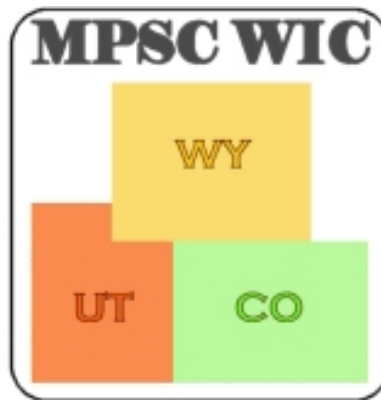

Mountain Plains States Consortium WIC System Project

DETAILED FUNCTIONAL DESIGN DOCUMENT

SC 0 SCHEDULER OVERVIEW

Presented to:



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Document Revisions

Revision Date	Updated By	Requested By	Description of Revision

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1 Introduction

The purpose of the Clinic Services Scheduler is to provide local agencies and clinics the ability to create and maintain various types of appointments for families in the WIC program. WIC appointments, Nutrition Education classes, and non-WIC appointments, and Personal appointments appear on the clinic schedule.

The Master Schedule screens (accessed via System Administration) are used to set up the clinic's working hours and available staff. See the SA Scheduler Screens DFDD for more information on establishing the clinic working hours and staff.

Scheduler also integrates with an auto-dialer system. At the clinic level, it is determined whether or not an auto-dialer is used. If a clinic uses an auto-dialer, then WIC appointments and Nutrition Education classes are available for the call file.

1.1 Interaction Between Scheduler and Clinic Services

The Scheduler and Clinic Services modules of the WIC system work closely together. Users frequently work with a family in Clinic Services and move directly to Scheduler to set up appointments for family members. Likewise, users working in Scheduler can search for and retrieve families to schedule for appointments or nutrition education classes.

The following business rules describe how the WIC system handles interaction between the Scheduler and Clinic Services:

- If a user is viewing a family in Clinic Services and goes to Scheduler to view that family's appointments, the user clicks on the family's name in the Recent Family drop down list to have that same family in view when they return to Clinic Services. If no specific family is selected and the user clicks on the Clinic Services navigation button, then the user is presented with the Simple Search screen in the main panel.
- If the user is viewing an existing family in Clinic Services that family appears in the recent families list if the user switches to the Scheduler. Users can then use the recent families list to select that family for an appointment. (Users also have the option to search for a different family for an appointment.)
- Scheduler does not allow the user to make an appointment for a new family until that family is saved in Clinic Services.
- The schedule of a disconnected clinic is locked during the hours the disconnected clinic is in session so that no connected PCs can schedule to that clinic while it is in session.

Note: Within Scheduler, participant lists are sorted differently than they are within Clinic Services because the data set available does not always have the age calculated for the participants and age is not displayed as prevalently in Scheduler as it is in Clinic Services. Each system component that displays participants in lists within Scheduler has a sort order defined.

2 Navigation Panel

The Navigation Panel contains:

- Navigation buttons stacked starting from the bottom of the panel.
- Multiple calendars.

2.1 Navigation Buttons

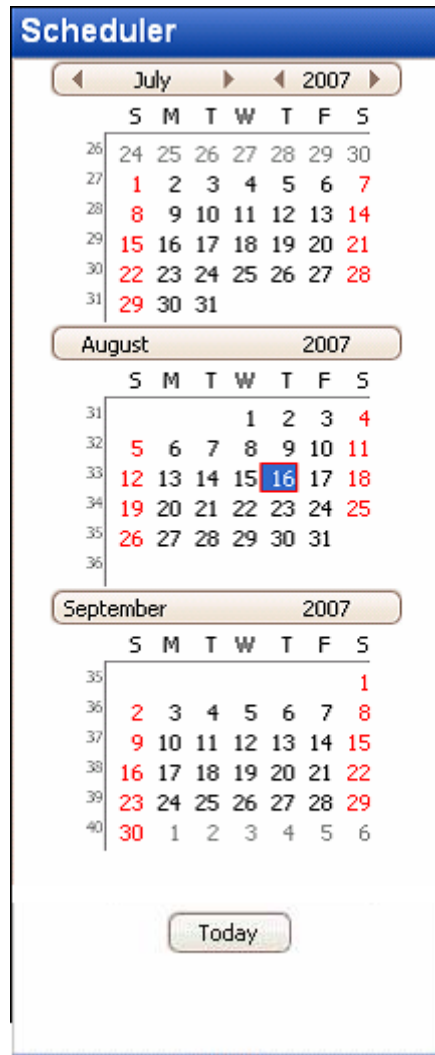
The navigation button labeled “Scheduler” allows the user to access the Scheduler functional area.

When the user clicks on the Scheduler navigation button,

- Navigation Panel contains multiple calendars. See the Multiple Calendars section in this document for more details.
- Main Panel contains the WIC Clinic Schedule for the current day. See the Main Panel section in this document for more details.
- Information Panel displays the System and Messages tabs by default.

2.2 Multiple Calendars

The Multiple Calendars is a graphic representation of calendar months. The first month displayed is the current month (with the current day highlighted inside it). The next months follow. The number of months displayed is dependent on the user’s screen resolution. The user selects days in these months to determine which day’s Appointment Calendar is shown in the Main Panel. The user can also navigate to other months using the month spin control or the year spin control. The Today button at the bottom of the Multiple Calendars can be selected to revert to the current day’s Appointment Calendar.



2.3 Saving Work

The Scheduler area saves units of work at the appointment level. A save confirmation pop-up is presented to the user when a new functional area of the system is selected. Main Panel

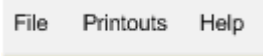
This panel is where all the screens described in the remaining Scheduler DFDDs are displayed.

3 Information Panel

The Information Panel contains two tabs. The first is entitled "System" which contains active "System Wide" and "Scheduler" type system messages. The second is entitled "Messages" which contains warning and error messages associated with the main panel screen. These are described in the System Overview DFDD.

4 Menu Bar

The Scheduler Menu Bar is visible at all times and is found at the top of the screen.



Control	Description
File	Select File to display File menu options. See File Menu section for more information.
	Type Menu Item
	Hot Key Alt + F
Printouts	Select Printouts to display the options for which a user can print the clinic schedule for a particular day. Note: These are not participant notices. These are UI outputs related to the scheduler. <ul style="list-style-type: none"> • Daily Calendar • Clinic Roster
	Type Menu Item
	Hot Key Alt + O
Help	Select Help to display Help menu options. See Help Menu section for more information.
	Type Menu Item
	Hot Key Alt + H

4.1 File Menu

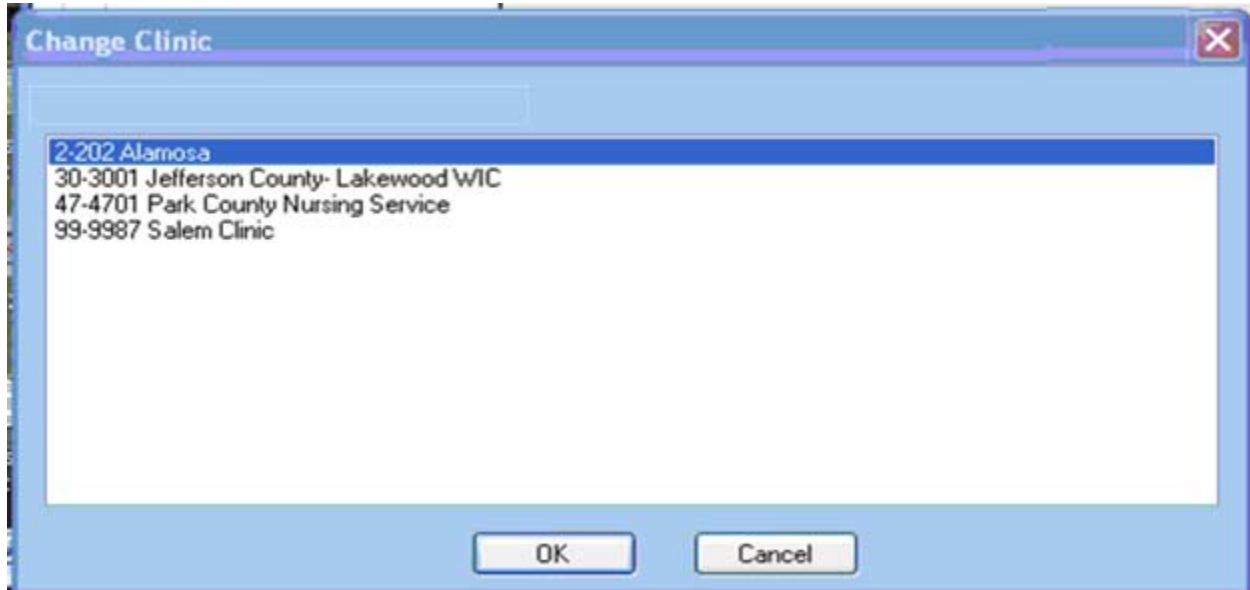
The File menu is visible at all times, giving access to common File functions.



Control	Description
Change Clinic	Select Change Clinic to select a different clinic.
	Type Menu Item
	Hot Key Ctrl + G
Exit	Select Exit to exit the application.
	Type Menu Item
	Hot Key Alt + F4

4.1.1 Change Clinic

This pop-up is used to change the clinic that the user is logged onto. At user logon, the user selects a clinic. The access for the user is based on the clinic.



Control	Description		
unlabeled	The unlabeled data grid within the Change Clinic pop-up window allows the user to select another clinic. The user sees clinics that he or she has access rights to see. The user highlights the clinic that he or she wants to go to and clicks the OK command button.		
	Type	Read-Only Data Grid	
	Display	Yes	
LA-Clinic number	This is the local agency-clinic number.		
	Format	Z9-ZZZZ9	Calculated
Clinic name	This is the name of the clinic.		
	Format	Alphanumeric	Calculated
OK	Clicking the OK button changes the clinic and returns the user back to the main application.		
	Type	Command Button	
	Hot Key	Alt + O	
Cancel	Clicking the Cancel button returns the user back to the main application.		
	Type	Command Button	
	Hot Key	Alt + L	

4.2 Printouts Menu

The Printouts menu is visible at all times, giving access to printouts associated with the scheduler.



Control	Description	
Daily Calendar	Select the Daily Calendar menu item to print the daily calendar for the calendar day that is currently displayed in the calendar.	
	Type	Menu Item
	Hot Key	None
Clinic Roster	Select the Clinic Roster menu item to print the clinic roster for the calendar day that is currently displayed in the calendar.	
	Type	Menu Item
	Hot Key	None

4.2.1 Daily Calendar (Static)

The Daily Calendar is a UI Output that shows the clinic calendar like it is shown on the screen. The user selects columns and dates to print based on the Page Setup dialog box that is part of the calendar control. (The Page Setup Dialog box is part of the purchased calendar control. No customization is available for this dialog box. Refer to Page Setup for more information about this dialogue box.) This UI Output would allow for paper scheduling if clinic flow or staffing requires. The minimum appointment durations and the way that the clinic schedules appointments dictates how much of the information about an individual appointment can be seen. For a WIC appointment, where there is space within the appointment period, the endorser's name, the appointment type, the participant's names, and the appointment notes are displayed. For Nutrition Education Class Appointments or Non-WIC Appointments, only the name of the class or appointment is indicated.

Note: Because the printing of the calendar is a function of the purchased calendar control, this UI output is not available for state customization through System Administration.

4.2.1.1 Language: English

The daily calendar is available in English only.

4.2.1.2 Daily Calendar Mockup

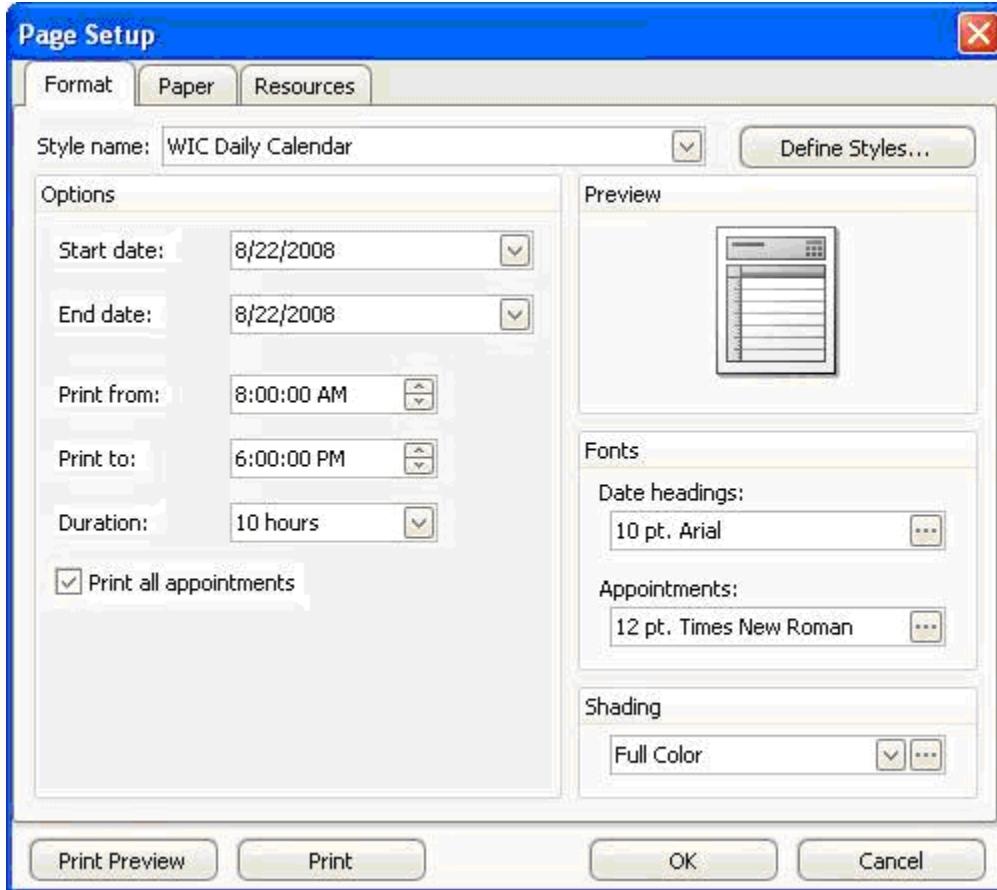
		Wednesday, July 30	
		CPA1	CPA2
8 AM	30		
9 00	30	Chelsea Clinton BW, Balu Booth BW, Obiwan Kenobi BW, Don Allison BW, Donna Houser BW, Emily Richards BW, Emily Richards BW	Open WIC Appointment Slot
10 00	30	Chelsea Clinton BW, Balu Booth BW, Obiwan Kenobi BW, Don Allison BW, Donna Houser SN, George Bush SN BW, Hillary Bennecoff SN BW, Emily Richards SN BW, Balu Booth SN BW, Mad-Eye Moody	Open WIC Appointment Slot
11 00	30	Open WIC Appointment Slot	BW, Chelsea Clinton BW, Balu Booth BW, Obiwan Kenobi BW, Don Allison BW, Donna Houser BW, Chelsea Clinton BW, Balu Booth BW, Obiwan Kenobi BW, Don Allison BW, Donna Houser
12 PM	30	Lunch	Lunch
1 00	30	Open WIC Appointment Slot	Open WIC Appointment Slot
2 00	30	Open WIC Appointment Slot	Open WIC Appointment Slot
3 00	30	Open WIC Appointment Slot	Open WIC Appointment Slot
4 00	30	Open WIC Appointment Slot	Open WIC Appointment Slot
5 00	30		
6 00	30		

Business Rules
<ol style="list-style-type: none"> 1. This UI output is landscape. 2. For WIC appointments, print the WIC Appointment's Subject (Appointment.Subject), see WIC Appointment in the SC 1 DFDD for additional details. 3. For NE appointments, print the Nutrition Education Class Appointment's Subject (Appointment.Subject), see Nutrition Education Class Appointment in the SC1 DFDD for additional details. 4. For Non-WIC or Personal appointments, print the following information (Appointment.Subject): Subject of the appointment (Appointment.Subject)

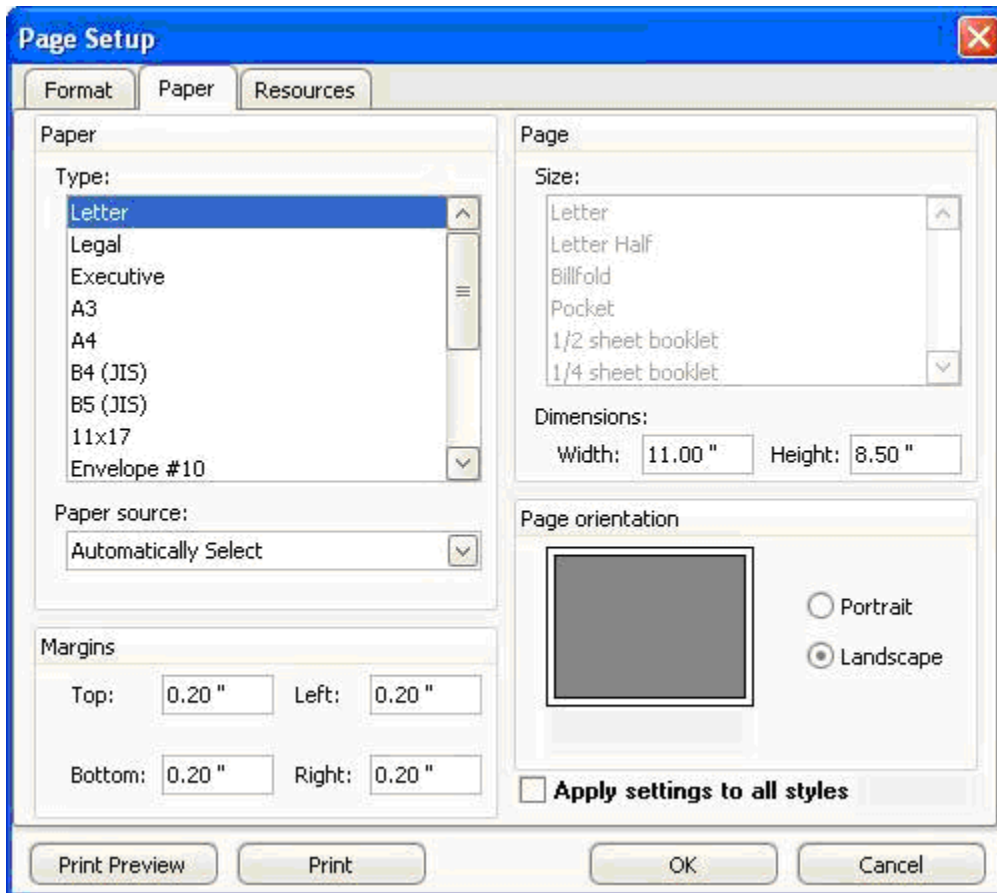
4.2.2 Page Setup

The Page Setup dialogue box is used to select the format styles, paper size, and the columns that are printed on the Daily Calendar. As a part of the purchased calendar control, no customization will occur with this dialogue box.

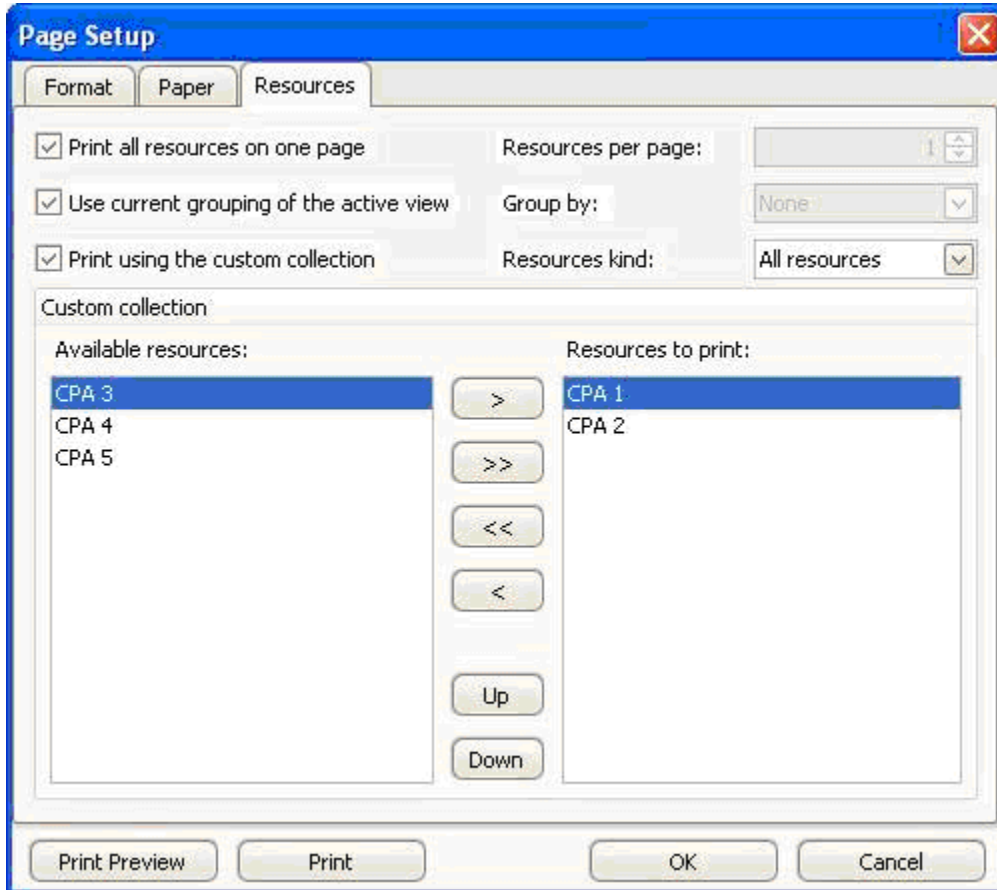
The Format tab of the Page Setup dialogue box is used to define the Style of the document. The WIC Daily Calendar is the style that produces the Daily Calendar. It is unlikely that any additional options will be utilized by the WIC staff, but as part of the calendar control, the additional options are depicted too.



The Paper tab of the Page Setup dialogue box is used to select the paper and page orientation. Staff will ordinarily not change the default settings, but it is available if necessary for the printing situation.

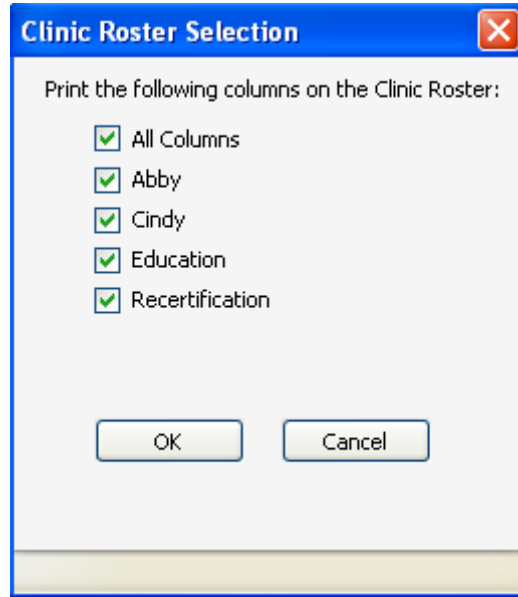


The Resources tab of the Page Setup dialogue box is used to select the columns that are printed on the Daily Calendar. Resources are equal to columns in the calendar. The user has the ability to print all resources (columns) on one page or define how many resources (columns) per page, print only the resources (columns) that are currently in view on the calendar, or print the resources (columns) selected through the custom collection data grid.



4.2.3 Clinic Roster Selection Pop-Up

The Clinic Roster Selection Pop-up allows staff to select specific columns to print on the Clinic Roster.



Control	Description			
Print the following columns on the Clinic Roster: - All Columns	Checking this checkbox allows the printing of all columns on the Clinic Roster.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	Not Stored		
Print the following columns on the Clinic Roster: - (additional check boxes)	Checking this checkbox allows the printing of that specific column on the Clinic Roster.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	Not Stored		
OK	The OK button allows the printing of the Clinic Roster with the selected columns.			
	Type	Command Button		
	Hot Key	Alt + O		

Control	Description	
Cancel	The Cancel button returns the user to the WIC Clinic Schedule.	
	Type	Command Button
	Hot Key	Alt + L

Business Rules
<ol style="list-style-type: none"> 1. Display all active columns on the schedule for the day specified. 2. Display an error message if no check boxes are selected and user clicks OK. 3. If the user selects the "All Columns" checkbox, then the system automatically selects all subsequent checkboxes. 4. If the user unselects the "All Columns" checkbox, then the system automatically unselects all subsequent checkboxes. 5. If any of the checkboxes except the "All Columns" checkbox are unselected, then unselect the "All Columns" checkbox. 6. If the user selects all of the checkboxes except the "All Columns" checkbox, then the system automatically selects the "All Columns" checkbox. 7. Display "All Columns" as the top checkbox, then sort remaining checkboxes in alphabetical order.

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

4.2.4 Clinic Roster (Static)

The Clinic Roster is often printed out ahead of the clinic day and used for a call reminder listing or for clinic preparation. This may also be printed if there is suddenly a need to cancel a number of appointments. It is likely that rescheduling will occur when the family next contacts the WIC office or when a rescheduled day is established. The clinic roster is sorted by the Appointment Time.

4.2.4.1 Language: English

The clinic roster is available in English only.

4.2.4.2 Clinic Roster Mockup

Clinic Roster

1-31 River Plaza
October 30, 2007

Appt Time	Participant Name	Person ID	DOB	Endorser Name	Family Phone	Appt Type	Column	Language	Indicators	Notes	Result	Response
9:00 AM	Heather Messer	654123	10/13/1985	Heather Messer	(303) 555-7979	CERT	Column A	Spanish	IN		Answered	Confirmed
9:00 AM	Cora Messer	447896	5/30/2006	Heather Messer	(303) 555-7979	FUP	Column A	Spanish	HR, IN		Answered	Call Attended
9:30 AM	Carol Daxner	423245	5/20/1980	Carol Daxner	(303) 555-4477	CERT	Column B	English		Interested in breastfeeding instructions	No Answer	No Response
10:00 AM	Lisa Joyce	441225	7/15/2005	Marla Joye	(303) 555-9878	CERT	Column A	English			Answered	Confirmed
10:00 AM	Daniel Mitchell	789789	12/20/2004	Alicia Mitchell	Do Not Call	RCRT	Column A	English	HR		No Call	No Response
10:00 AM	Gabriela Nunez	434556	10/31/2005	Celia Nunez	(303) 555-9283	RCRT	Column B	Spanish	IN		Answered	Confirmed
10:00 AM	Lola Nunez	199159	10/25/2007	Celia Nunez	(303) 555-9283	CERT	Column B	Spanish	IN		Answered	Confirmed
1:00 PM	Laura Bennett	369369	11/18/1987	Laura Bennett	(303) 555-4897	CERT	Column A	English	HR		Answered	Wrong Number
1:30 PM	Regina Sbaa	456456	12/17/2005	Alicia Sbaa	Do Not Call	FUP	Column B	English			No Call	No Response
2:00 PM	Peter Robleson	789789	10/19/2006	Sally Robleson	(303) 555-1235	CERT	Column A	English			As Machine	No Response
2:30 PM	Maya Clark	664554	4/21/1988	Maya Clark	(303) 555-6789	FUP	Column B	English			Answered	Confirmed
3:00 PM	Rhonda Peterson	335779	6/22/1989	Rhonda Peterson	(303) 555-6678	FUP	Column B	English	HR		Answered	Confirmed
3:00 PM	Dana Andrews	776449	7/28/1985	Dana Andrews	(303) 555-7538	CERT	Column A	English			Busy	No Response
3:00 PM	Ali Dooiq	554881	6/5/1987	Ali Dooiq	(303) 555-6642	CERT	Column A	Vietnamese	IN, SN		Answered	Confirmed
3:00 PM	Marla Hill	441332	2/14/1992	Marla Hill	Do Not Call	NTED	Column A	English			No Call	No Response
3:00 PM	Amanda Hill	196678	8/15/2007	Marla Hill	Do Not Call	NTED	Column A	English			No Call	No Response
3:30 PM	Oleir Wyatt	357483	7/5/2007	Sheila Wyatt	(303) 555-3346	FUP	Column B	English	HR		Answered	Call Attended

Business Rules
1. This UI output is landscape.
2. Page numbering in the output should appear in the footer-right in the format "Page x of y".
3. Print the columns selected in the Clinic Roster Selection pop-up.
4. LA-Clinic header = Clinic.LA_ID, Clinic.FFclinicID
5. Clinic Date = MasterSchedule.MasterScheduleDt
6. Appt Time = Appointment.StartTime
7. The participant name is FamilyMember.FirstName+FamilyMember.MiddleName+FamilyMember.LastName+FamilyMember.LastNameSuffix
8. Person ID = FamilyMember.FFMemberID
9. DOB is Participant.BirthDt. Display as mm/dd/yyyy.
10. The endorser name is FamilyMember.FirstName+FamilyMember.MiddleName+FamilyMember.LastName where FamilyMember.ParentGuardianIn = "Y"
11. Family Phone = BenefitFamily.HomePhoneAreaCd + BenefitFamily.HomePhoneNr, Display as (999) 999-9999 Note: If BenefitFamily.DoNotCallIn = Yes, then display "Do Not Call" instead of the phone number.
12. Appt Type = Appointment.AppointmentTypeCd (Short description for WIC Appointments only, no Nutrition Education Class Appointments)
13. Column = AppointmentColumn.MSC_ID
14. Language = BenefitFamily.SpokenLanguageCd
15. Indicators = RiskHeader.HighRiskIn, FamilyMember.SpecialNeeds, BenefitFamily.NeedInterpreterIn, Participant.MiscarriageIn
16. Notes = Appointment.Note
17. Result and Response columns are present on the UI output only if the CClinic.AutoDialerIn is marked on the Clinic Details screen.
18. Result = Appointment.AutoDialResult

Business Rules

19. Response = Appointment.AutoDialResponse
20. Sort by Appointment Time, Column, Endorser Name (full name=First Middle Last Suffix), Participant Name (full name=First Middle Last Suffix).

4.3 Help Menu

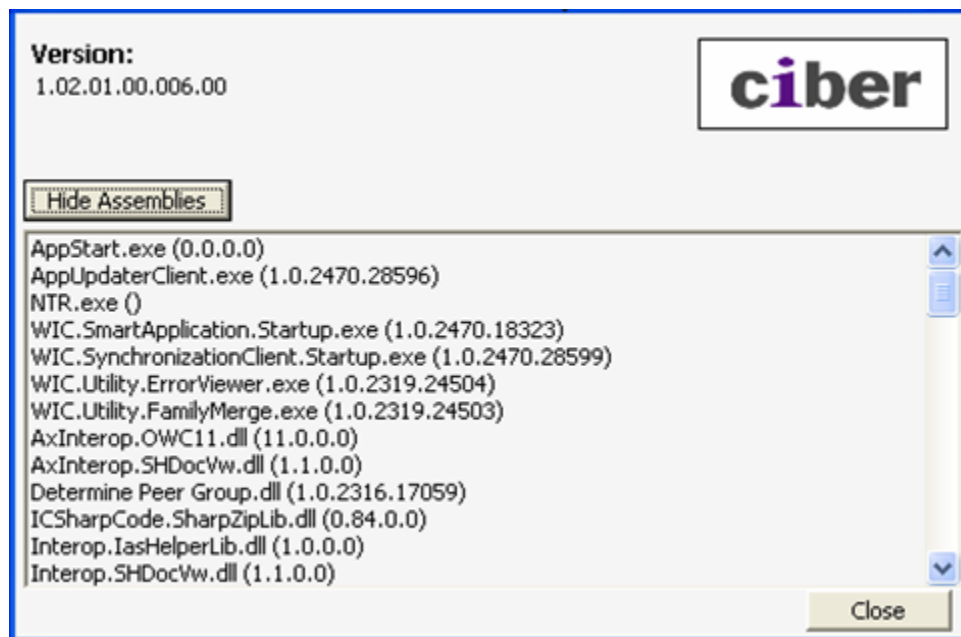
The Help menu is visible at all times, giving access to user help and system version information.




Control	Description
User Help	Clicking the User Help menu item allows the user to view the current version of the application user help. This opens a Help window as described in the System Overview DFDD.
	Type Menu Item
	Hot Key None
About (System Name)	Clicking the About (parameter) menu item allows the user to view version and system information.
	Type Menu Item
	Hot Key None

4.3.1 About (System Name) Pop-up

This pop-up provides the user with the version number of the application and allows for assemblies to be viewed as needed.



Control	Description				
Version	The version number that is displayed shows the version of the application that is currently being used (as defined in system parameter).				
	Type	Text Box			
	Required	NA			
	Length	NA			
	Validation	NA			
	Display Only	Yes	Calculated	No	
	DB Column	Not Stored			
	The CIBER logo appears for branding purposes. This is the company that developed the application.				
	Type	Text Box			
	Required	NA			
	Length	NA			
	Validation	NA			
	Display Only	Yes	Calculated	No	
	DB Column	NA			
Show Assemblies/Hide Assemblies	By default, the About (System Name) Pop-Up displays the version number of the application. Clicking the Show Assemblies command button displays system assemblies. Clicking the Hide Assemblies command button returns to the default view.				
	Type	Command Button			
	Hot Key	Alt + M			
Close	Clicking the Close command button closes the About (system name) pop-up and returns the user to the Clinic Services screens.				
	Type	Command Button			
	Hot Key	Alt + C			






Business Rules
1.



Developer Notes
1.


5 Tool Bar (and Header Information)

The Scheduler Tool Bar is visible at all times, giving access to frequently used functions and screens, including the Clinic.



Control	Description	
	Clicking this Save icon saves any changes that were made on the current screen to the database.	
	Type	Command Button
	Hot Key	None
	Clicking this New Appointment icon shows a pop-up where the user selects an appointment type and then shows the type of appointment editor pop-up that is appropriate for the appointment type selected.	
	Type	Command Button
	Hot Key	None
	Clicking this Find Open Appointment icon opens the Find Open Appointment Slot pop-up as specified in the SC 1 Scheduler – Appointment Screens DFDD. The most recently viewed family's Family Preferences appear by default in the Find Open Appointment Slot pop-up. If no family was recently viewed then family information is not shown. The Find Open Appointment Slot pop-up selection criteria also display.	
	Type	Command Button
	Hot Key	None
	Clicking the arrow of this Recent Family icon allows the user to access a recent family by selecting from the list of 10 most recently accessed families.	
	Type	Command Button
	Hot Key	None
	Clicking this Income Guideline icon will display the Income Guidelines Reference pop-up screen.	
	Type	Command Button
	Hot Key	None

Control	Description			
<p>LA/Clinic</p>	<p>This is a list box of the agencies and clinics that the user has security access to.</p>			
	<p>Type</p>	<p>List Box</p>		
	<p>Required</p>	<p>Yes</p>		
	<p>DB Column</p>	<p>LocalAgency.FFLocalAgencyID</p>		
	<p>Code ID</p>	<p>ClinicSchedule.CInID</p>		
	<p>The refresh timer tells a user how long it has been since the Scheduler data has been refreshed. After the number of minutes in the system parameter, Scheduler.RefreshMinutes, the time turns red and a reminder informational message is placed in the Messages tab in the Information Panel.</p>			
	<p>Type</p>	<p>Text Box</p>		
	<p>Required</p>	<p>NA</p>		
	<p>Length</p>	<p>NA</p>		
	<p>Validation</p>	<p>00:00:00</p>		
	<p>Display Only</p>	<p>Yes</p>	<p>Calculated</p>	<p>Yes</p>
	<p>DB Column</p>	<p>Not Stored</p>		
	<p>Clicking the Date Range Quick Select icon allows the user to quickly move to a predefined period of time on the WIC Clinic Schedule. The schedule is refreshed and the dates are displayed.</p>			
	<p>Type</p>	<p>Command Button</p>		
	<p>Hot Key</p>	<p>None</p>		
<p>Start Date</p>	<p>This is the first date of retrieved data that Scheduler has available to the user.</p>			
	<p>Type</p>	<p>Date Picker</p>		
	<p>Required</p>	<p>Yes</p>		
	<p>Display Only</p>	<p>No</p>	<p>Calculated</p>	<p>No</p>
	<p>DB Column</p>	<p>Not Stored</p>		
<p>End Date</p>	<p>This is the end date of retrieved data that Scheduler has available to the user.</p>			
	<p>Type</p>	<p>Date Picker</p>		
	<p>Required</p>	<p>Yes</p>		
	<p>Display Only</p>	<p>No</p>	<p>Calculated</p>	<p>No</p>
	<p>DB Column</p>	<p>Not Stored</p>		

Control	Description	
	Clicking this Refresh icon refreshes the displayed schedule.	
	Type	Command Button
	Hot Key	None

Business Rules
<ol style="list-style-type: none"> 1. For LA/Clinic Listbox, if user is currently connected, apply user security, then make read only all clinics that are operating in Disconnected mode and are open today. 2. For LA/Clinic Listbox, if user is currently disconnected, apply user security, then make read only all clinics except the disconnected clinic that the user is logged into. 3. When the application starts, the Start Date and End Date default to the number of days defined in the system parameter, Scheduler.AppointmentsNoDaysToDisplay. 4. The Date Range Quick Select selections include: Just Today, Today to 2 weeks from now, Today to 4 weeks from now, Today to 6 weeks from now, 2-3 weeks from now, 4-5 weeks from now, 6-11 weeks from now, and 12-16 weeks from now. 5. When the Date Range Quick Select selections are used, the WIC Clinic Schedule is refreshed and the new date range is presented to the user. The Start Date and End Date fields reflect the new selection. 6. The user can narrow or widen the date range by changing the Start Date and End Date. Performance may be impacted if too large of a range is selected. 7. After changing either Start Date or End Date, the user must press the refresh button to refresh the data according to the new date range. 8. Display an error message when the user clicks the Refresh button if the End Date is prior to Start Date. 9. Display an error message if the End Date is more than the system parameter, Scheduler.MaxRetrievalDays, after the Start Date. 10. Dates inside the selected date range appear red (Closed) or black (Open) on the Navigation Panel calendars based on their closed or open status. 11. Dates outside the selected date range appear gray on the Navigation Panel calendars. 12. If the user clicks on a date on the calendars that is not included in the currently selected date range, present the following text in the main panel "This date is outside the currently selected date range." 13. The application continues to use the selected date range for the user until the user moves to a different functional area of the application or the application is closed. When the user returns to Scheduler, the dates return to the default date range defined in the system parameter, Scheduler.AppointmentsNoDaysToDisplay. 14. When trying to access a family's record in Clinic Services using the Recent Families list, the system evaluates if the user has view or update rights to the selected family. <ol style="list-style-type: none"> a. If the user has view or update rights for the family, then the system changes to the Clinic Services functional area and displays the Family screen for the selected family. b. If the user does not have view or update rights for the family, then the system displays an informational message indicating that they don't have user permissions for this family. The user remains on the WIC Clinic Schedule.

Developer Notes

1. Connected mode = Clinic.AllowLoginIn = 1 and Clinic.NDTComputerNm = null and Clinic.NDTInstanceNm = null
2. Disconnected mode = Clinic.DisconnectedClinicIn = 1 or Clinic.AllowLoginIn = 0
3. Open today = MasterScheduleDt = today's date and the ClosedReason and HolidayName fields are null or empty