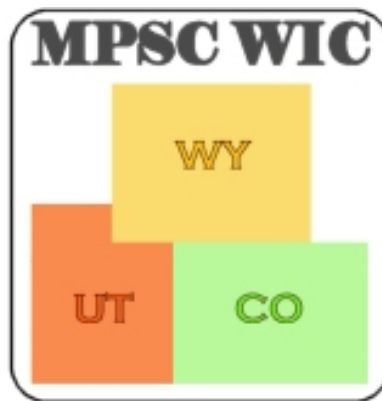

Mountain Plains States Consortium WIC System Project

DETAILED FUNCTIONAL DESIGN DOCUMENT SCHEDULER REPORTS

Presented to:



Revision Date: January 7, 2011

Prepared by

ciber

650 Wilson Lane, Suite 200
Mechanicsburg, PA 17055
717.691.5500

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 Scheduler Reports

1.1 Appointment Summary Report

Description	To support trend analysis of WIC appointment types over time by clinic and percentage of appointments kept, cancelled, missed due to no show, rescheduled, and mass rescheduled.
Parameters	Local Agency, Date Range, Column
Record Selection / Filtering / Calculations	<p>All WIC appointments with date range for the specified Local Agency. Percentages are with respect to total appointment count. The Appointment Summary database table contains records for each participant appointment type with counts for Kept (Arrived + Seen), No Show, Cancelled, Rescheduled, and Mass Rescheduled.</p> <p># Kept = count of Arrived + Seen % Kept = # Kept/Total Appts for Appt Type * 100 # No Show = count of No Show for Appt Type % No Show = # No Show/Total Appts for Appt Type * 100 # Cancelled = count of No Show for Appt Type % Cancelled = # Cancelled / Total Appts for Appt Type * 100 # Rescheduled = count of Rescheduled for Appt Type % Rescheduled = # Rescheduled / Total Appts for Appt Type * 100 # Mass Rescheduled = count of Mass Rescheduled for Appt Type % Mass Rescheduled = # Mass Rescheduled / Total Appts for Appt Type * 100</p> <p>Total Appts = count of Kept + No Show + Cancelled + Rescheduled + Mass Rescheduled for the Appt Type</p> <p>This report will exclude investigation family related data.</p>
Print Columns	<p>Agency/Clinic header, Column, Appt. Type, # Kept, % Kept, # No Show, % No Show, # Cancelled, % Cancelled, # Rescheduled, % Rescheduled, # Mass Rescheduled, % Mass Rescheduled, Total Appts</p> <p>Note: The agencies and clinics listed in the header areas should be in the format <i>agency number – agency name</i> and <i>clinic number – clinic name</i>.</p>
Sort Order	Local Agency, Clinic, Column, Appt. Type
Total / Count Columns	All columns except Appt Type for Clinic grouping, including Column sub-total, Local Agency sub-total, and a State total.
State Totals	Yes

1.2 High Risk Missed Appointment Report

Description	This report is used for monitoring purposes to assure that high risk participants are getting the appropriate appointments. It is also used to help schedule limited CPA time.
Parameters	Local Agency, Clinic, Date Range
Record Selection / Filtering / Calculations	Active participants designated as High Risk and no High Risk Appointment Kept within Date Range. This report will exclude investigation family related data.
Print Columns	Agency/Clinic, Priority, Participant Name, Person ID, Home Phone, Risk Factors, Date HR Assigned, Date Last Kept Appt, Date Next Appt, Dates of Missed Appts between Last Kept and Next Note: The agencies and clinics listed in the header areas should be in the format <i>agency number – agency name</i> and <i>clinic number – clinic name</i> .
Sort Order	Local Agency, Clinic, Priority, Participant Last Name
Total / Count Columns	N/A
State Totals	No
Primary Group (page break)	Local Agency
Additional Group By	Clinic / Priority
Developer Notes	Active = WIC Status = Active High Risk = RiskHeader.HighRiskIn set to "Yes" High Risk appointment completed = CompletedNtrEd.HighRiskFollowUpIn set to "Yes" Priority = RiskDet.ParticipantRiskPrtyNr Display Participant Name as FamilyMember.FirstName + FamilyMember.MiddleName + FamilyMember.LastName + FamilyMember.LastNameSuffix. Person ID = FamilyMember.FFMemberID Home 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. Risk Factors = Display as ParticipantRiskCode.ParticipantRiskCd

Date HR Assigned = the most recent RiskHeader.RecordedDt when RiskHeader.HighRiskIn set to "Yes"
 Date Last Kept Appt = Appointment.StartTime, most recent with a past date
 Date Next Appt = Appt. Dt. = Appointment.StartTime, next with a future date and Status = Scheduled, Rescheduled or Mass Rescheduled
 Dates of Missed Appts between Last Kept and Next = AppointmentParticipant.AppointmentStatusCd = No Show between Date Last Kept Appt and Date Next Appt

High Risk Missed Appointment Report
 6/1/2007 to 6/30/2007

Print Date: 7/2/2007

Agency/Clinic	Priority	Participant Name	Person ID	Home Phone	Risk Factors	Date HR Assigned	Date Last Kept Appt	Date Next Appt	Dates of Missed Appts between Last Kept and Next
1 - AgencyOne									
1 - ClinicOne									
	1	Sandra Brown	123456	(303) 555-4646	103	4/18/2007	5/1/2007	7/24/2007	6/4/2007
		Dominic Clark	211554	(303) 555-4477	134, 341	3/4/2007	5/19/2007	7/15/2007	6/1/2007, 6/18/2007
		Alice Sanders	112112	(303) 555-3258	132	3/26/2007	5/16/2007	7/2/2007	6/10/2007
	3	Justin Andrews	456456	(303) 555-7894	135	2/25/2007	4/29/2007	7/5/2007	5/17/2007, 6/12/2007
	4	Sheila Walker	134134	(303) 555-4698	341	1/16/2007	5/3/2007	7/13/2007	6/12/2007
2 - ClinicTwo									
	1	Adam Bennett	224228	(303) 555-9632	135, 341	3/20/2007	3/20/2007	7/10/2007	4/20/2007, 5/14/2007, 6/13/2007
		Suzanne Myers	443443	(303) 555-3457	101, 131	4/1/2007	5/8/2007	7/21/2007	6/19/2007
	3	Arnold Sampson	776776	(303) 555-4215	135	12/15/2007	4/25/2007	8/1/2007	5/19/2007, 6/29/2007

1.3 Interpreter Needs Report

Description Forecast of when interpreters will be needed so that arrangements can be made in advance for their services.

Parameters Local Agency, Date Range

Record Selection / Filtering / Calculations	<p>All WIC Appointments or Nutrition Education Class Appointments needing an interpreter within the Date Range for the specified Local Agency and / or Clinic.</p> <p>This report will exclude investigation family related data.</p>
Print Columns	<p>Appt Date, Appt Time, Appt Type, Endorser Name, Home Phone, Column, Preferred Language</p>
Sort Order	<p>Local Agency, Clinic, Appt Date, Appt Time, Appt Type, Endorser Name, Participant Name, Home Phone, Column, Preferred Language</p> <p>Note: The agencies and clinics listed in the header areas should be in the format <i>agency number – agency name</i> and <i>clinic number – clinic name</i>.</p>
Total / Count Columns	<p>N/A</p>
State Totals	<p>No</p>
Primary Group (page break)	<p>Local Agency</p>
Additional Group By	<p>Clinic</p>
Special Considerations Developer Notes	<p>If Do Not Call is indicated in the record, the phone number is not displayed on this report, instead print "Do Not Call" in place of the phone number or alternate phone number.</p> <p>Detail data is extracted on a weekly basis from all WIC Appointments and Nutrition Education Class Appointments scheduled for a six month period (3 months prior to today and 3 months in the future) where the Needs Interpreter Check Box is marked.</p> <p>Appt Date = Appointment.StartTime Appt Time = Appointment.StartTime Appt Type = Appointment.AppointmentTypeCd = WIC Appointments or Nutrition Education Class Appointments Display Endorser Name as FamilyMember.FirstName + FamilyMember.MiddleName + FamilyMember.LastName + FamilyMember.LastNameSuffix when FamilyMember.ParentGuardianIn = 1. Home 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 or alternate phone number. Column = AppointmentResource.DisplayText Preferred Language = BenefitFamily.SpokenLangCd</p>

The column label for Endorser Name is dependent upon the value set in the system parameter, ClinicServices.HeadofHouseholdLabelToUse.

Interpreter Needs Report
6/1/2007 - 8/31/2007

Print Date: 5/1/2007

Agency/Clinic	Appt Date	Appt Time	Appt Type	Endorser Name	Home Phone	Column	Preferred Language
1 - AgencyOne							
1 - ClinicOne	6/5/2007	08:00 AM	Nutr. Ed. Class	Betty B Fayeh	(303) 555-1234	Nutr. Ed.	African dialect
	6/15/2007	09:00 AM	WIC Appt.	Musbim Amman	(303) 555-9876	Maternal Health	African dialect
	6/10/2007	10:00 AM	Nutr. Ed. Class	Mirzeta Harbas	Do Not Call	Nutr. Ed.	Bosnian
	6/8/2007	11:00 AM	WIC Appt.	Laura Campos	(303) 555-9988	CPA	Spanish
	6/19/2007	02:00 PM	WIC Appt.	Corina Rodriguez	(303) 555-1155	Maternal Health	Spanish
	6/22/2007	04:00 PM	WIC Appt.	Maria Cruz-Castro	(303) 555-7733	Maternal Health	Spanish
2 - ClinicTwo							
	6/2/2007	09:00 AM	Nutr. Ed. Class	Nyibol Dhol	Do Not Call	Nutr. Ed.	Arabic
	6/7/2007	11:00 AM	WIC Appt.	Boonme Wiratsony	(303) 555-8765	Maternal Health	Laotian
	6/5/2007	12:00 PM	WIC Appt.	Anabel Alvarado	(303) 555-4456	CPA	Spanish
	6/5/2007	01:00 PM	Nutr. Ed. Class	Karla Nunez	(303) 555-2390	Nutr. Ed.	Spanish
	6/10/2007	02:00 PM	WIC Appt.	Anh Duong	(303) 555-7823	CPA	Vietnamese

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Rev: 2/25/2006

1.4 Missed Appointment Report

Description To follow up with participants who do not keep their appointments or who cancel without rescheduling, especially pregnant women.

Parameters Local Agency, Date Range, Appt Type, Part Category, Column

Record Selection / Filtering / Calculations All No Show or Cancelled WIC appointments and Not Attended Nutrition Education Class appointments within Date Range for specified Local Agency and / or Clinic for selected Appointment Types and selected Participant Categories.

Filter by Staff Name

This report will exclude investigation family related data.

Print Columns Agency/Clinic header, Participant Category, Column, Endorser Name, Participant Name, Family ID, Appt Type, Appt Dt, Home Phone, Alternate Phone, Preferred Language, Cert End Dt (Certification End Date)

Note: The agencies and clinics listed in the header areas should be in the format *agency number – agency name* and *clinic number – clinic name*.

Sort Order Local Agency, Clinic, Participant Category, Column, Alphabetic by Endorser Last Name

Total / Count Columns	N/A
State Totals	No
Primary Group (page break)	Local Agency
Additional Group By	Clinic / Participant Category, Column
Special Considerations	If Do Not Call is indicated in the record, the phone number is not displayed on this report, instead print "Do Not Call" in place of the phone number and alternate phone number.
Developer Notes	<p>Detail data is extracted on a weekly basis from all appointments scheduled for a participant within a six month period (3 months prior to today and 3 months in the future) where the WIC Appointment status is 'Cancelled' or 'No Show' and where no subsequent appointment was made and its status is either 'Seen', 'Arrived' or 'Rescheduled' or where the Nutrition Education Class Appointment Status is 'Attended'.</p> <p>If a participant misses multiple appointments within the date range, multiple rows are used to show the multiple appointments.</p> <p>Participant Category = ParticipantType.ParticipantTypeCD Column = AppointmentResource.DisplayText Display Endorser Name as FamilyMember.FirstName + FamilyMember.MiddleName + FamilyMember.LastName + FamilyMember.LastNameSuffix when FamilyMember.ParentGuardianIn = Yes. Display Participant Name as FamilyMember.FirstName + FamilyMember.MiddleName + FamilyMember.LastName + FamilyMember.LastNameSuffix. Family ID = BenefitFamily.FFFamilyID Appt Type = Appointment.AppointmentTypeCd = WIC Appointments or Nutrition Education Class Appointments Appt Date = Appointment.StartTime Home 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. Alternate Phone = BenefitFamily.AltPhoneAreaCd + BenefitFamily.AltPhoneNr, Display as (999) 999-9999 Note: If BenefitFamily.DoNotCallIn = Yes, then display "Do Not Call" instead of the alternate phone number. Preferred Language = BenefitFamily.SpokenLangCd</p>

Cert End Dt = Certification.EndDt
 Status = AppointmentParticipant.AppointmentStatusCd
 The column label for Endorser Name is dependent upon the value set in the system parameter,
 ClinicServices.HeadofHouseholdLabelToUse.

Missed Appointment Report
 7/9/2007 - 7/13/2009

Print Date: 7/16/2007

Agency/Clinic	Participant Category	Column	Endorser Name	Participant Name	Family ID	Appt Type	Appt Dt	Home Phone	Alternate Phone	Preferred Lang	Cert End Dt
1 - AgencyOne											
	1 - ClinicOne										
	Breastfeeding	Column1	Patsy Allen	Patsy Allen	123123	Certification	7/13/2007	(303) 555-1929	(303) 555-7898	English	8/1/2007
			Debra Davis	Debra Davis	111111	Follow-up	7/10/2007	(303) 555-8877		English	10/1/2007
			Carrie Larson	Carrie Larson	877877	Follow-up	7/12/2007	(303) 555-1728		English	12/15/2007
			Dhol, Nyibol	Dhol, Nyibol	333444	Health Update	7/13/2007	(303) 555-9889	(303) 555-0989	Arabic	9/18/2007
		Column 2	Celia Nunez	Celia Nunez	789789	Certification	7/9/2007	Do Not Call		Spanish	8/4/2007
	Child	Column1	Cora Grayson	Matthew Grayson	987987	Certification	7/11/2007	(303) 555-1199	(303) 555-1238	English	8/15/2007
			Betsy Yothers	Taylor Alberts	774447	Health Update	7/10/2007	(303) 555-8822		English	1/16/2008
		Column 2	Tina Harrison	Dora Harrison	172834	Certification	7/12/2007	(303) 555-9182	(303) 555-1783	English	7/28/2007
			Ada Johnson	Joshua Johnson	874123	Certification	7/13/2007	(303) 555-7438	(303) 555-9348	English	8/10/2007
			Rhonda Thompson	Anthony Thompson	747432	Follow-up	7/10/2007	(303) 555-9843	(303) 555-1728	English	11/16/2007
			Amy Zell	Fiona Zell	918283	Health Update	7/12/2007	(303) 555-2398	(303) 555-8622	English	2/25/2008

1.5 Mass Rescheduling Report

Description The mass rescheduling report is used after a mass rescheduling has been done either intentionally or unintentionally.

Parameters Local Agency, Date Range

Record Selection / Filtering / Calculations All mass rescheduled appointments (WIC Appts and Nutrition Ed classes) within Date Range for specified Local Agency and / or Clinic. This report will exclude investigation family related data.

Print Columns	<p>Agency/Clinic, Orig Appt Dt (Original Appointment Date), Orig Appt Time (Original Appointment Time), Endorser Name, Participant Name, Family ID, Appt Type (Appointment Type), Home Phone, Preferred Lang (Preferred Language), New Appt Dt (New Appointment Date), New Appt Time (New Appointment Time)</p> <p>Note: The agencies and clinics listed in the header areas should be in the format <i>agency number – agency name</i> and <i>clinic number – clinic name</i>.</p>
Sort Order	<p>Local Agency, Clinic, By Original Appointment date and time, Endorser Last Name, Endorser First Name, Participant Last Name, Participant First Name</p>
Total / Count Columns	<p>None</p>
State Totals	<p>No</p>
Primary Group (page break)	<p>Local Agency</p>
Additional Group By	<p>Clinic</p>
Special Considerations	<p>If Do Not Call is indicated in the record, the phone number is not displayed on this report, instead print "Do Not Call" in place of the phone number.</p>
Developer Notes	<p>Orig Appt Dt = Appointment.StartTime of the 1st appointment in this set Orig Appt Time = Appointment.StartTime of the 1st appointment in this set Display Endorser Name as FamilyMember.FirstName + FamilyMember.MiddleName + FamilyMember.LastName + FamilyMember.LastNameSuffix when FamilyMember.ParentGuardianIn = Yes. Display Participant Name as FamilyMember.FirstName + FamilyMember.MiddleName + FamilyMember.LastName + FamilyMember.LastNameSuffix. Family ID = BenefitFamily.FFFamilyID Appt Type = Appointment.AppointmentTypeCd = WIC Appointments or Nutrition Education Class Appointments Home 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. Preferred Language = BenefitFamily.SpokenLangCd New Appt Dt = Appointment.StartTime of the 2nd appointment in this</p>

set

New Appt Time = Appointment.StartTime of the 2nd appointment in this set

Data Effective: 7/15/2007

Mass Rescheduling Report
7/9/2007 - 7/13/2009

Print Date: 7/16/2007

Agency/Clinic	Orig Appt Dt	Orig Appt Time	Endorser Name	Participant Name	Family ID	Appt Type	Home Phone	Preferred Lang	New Appt Dt	New Appt Time
1 - AgencyOne										
1 - ClinicOne	7/9/2007	10:00	Adams, Carolyn	Adams, Carolyn	158963	Nutrition Ed Class	(303) 555-1919	English	7/23/2007	10:00
	7/9/2007	10:00	Bennett, Tracy	Bennett, Tracy	424242	Nutrition Ed Class	(303) 555-1234	English	7/23/2007	10:00
	7/9/2007	10:00	Diaz, Milagros	Diaz, Milagros	748596	Nutrition Ed Class	(303) 555-4346	Spanish	7/23/2007	10:00
	7/9/2007	10:00	Dhol, Nyibol	Dhol, Nyibol	467979	Nutrition Ed Class	(303) 555-7536	Arabic	7/23/2007	10:00
	7/9/2007	10:00	Peterson, Jennifer	Peterson, Jennifer	168794	Nutrition Ed Class	Do Not Call	English	7/23/2007	10:00
	7/11/2007	3:00	Campos, Marta	Campos, Laura	654654	WIC Appointment	(303) 555-7458	Spanish	7/19/2007	2:00
	7/13/2007	9:00	Clark, Anna	Edwards, Josh	448996	WIC Appointment	Do Not Call	English	7/18/2007	9:00
2 - ClinicTwo	7/10/2007	11:45	Marshall, Lisa	Marshall, Lisa	412357	WIC Appointment	(303) 555-9876	English	7/20/2007	10:30
	7/12/2007	2:00	Allen, Cynthia	Allen, Deanna	551236	Nutrition Ed Class	(303) 555-4685	English	7/24/2007	2:00
	7/12/2007	2:00	Fletcher, Gina	Walker, Peter	123568	Nutrition Ed Class	Do Not Call	English	7/24/2007	2:00
	7/12/2007	2:00	Harrison, Maya	Harrison, Bruce	412357	Nutrition Ed Class	(303) 555-4983	English	7/24/2007	2:00
	7/12/2007	2:00	Nunez, Celia	Nunez, Carlos	741741	Nutrition Ed Class	(303) 555-2248	Spanish	7/24/2007	2:00

1.6 Processing Standards Non-Compliance Report

Description	To monitor non-compliance with USDA processing standards rules for how quickly participants were scheduled after initially contacting WIC. This report helps Local Agencies and the State Office determine if service levels are appropriate or not.
Parameters	Local Agency, Date Range
Record Selection / Filtering / Calculations	<p>Participants for the specified Local Agency with the current Application within date range and exceeds processing standard identified for the participant, based on category, homeless or migrant, and walk-in status.</p> <p>Exceeding processing standards is determined by the control Processing Standards Exceeded on the appointment pop-up. The business rules for setting this attribute are described in SC 1 Scheduler – Appointments Screens.</p> <p>This report will exclude investigation family related data.</p>
Print Columns	<p>Local Agency heading, Clinic heading, Compliance Standard Days, Participant Category, Family ID, Participant Name, Days from Contact to Service, Reason for Exceeding Standard, DOB (Date of Birth), Migrant, Homeless, Walk-In.</p> <p>Note: The agencies and clinics listed in the header areas should be in the format <i>agency number – agency name</i> and <i>clinic number – clinic name</i>.</p>
Sort Order	Local Agency, Clinic, Family ID, Participant Name
Total / Count Columns	Non Compliance total for agencies and clinics
State Totals	No
Primary Group (page break)	Local Agency
Additional Group By	Clinic
Developer Notes	<p>Compliance Standard Days = ProcessingStandardCategory.DaysAllowedCd or ProcessingStandardCategory.DaysAllowedCd + 5 days if ProcessingStandardCategory.DaysAllowedExtendedCd is set to "Yes"</p> <p>Participant Category = ParticipantType.ParticipantTypeCD Family ID = BenefitFamily.FFFamilyID Display Participant Name as FamilyMember.FirstName +</p>

FamilyMember.MiddleName + FamilyMember.LastName +
 FamilyMember.LastNameSuffix.
 Reason for Exceeding Standard = Appointment.ProcStandardReason
 DOB = Participant.BirthDt
 Migrant = BenefitFamily.MigrantIn
 Homeless = BenefitFamily.HomelessIn
 Walk-In = Appointment.WalkInIn

Processing Standards Non-Compliance Report
 6/1/2007 - 6/30/2007

Print Date: 7/3/2007

Agency/Clinic	Compliance Standard Days	Participant Category	Family ID	Participant Name	Days from Contact to Service	Reason for Exceeding Standard	DOB	Migrant	Homeless	Walk-In
1 - AgencyOne										
Agency Non Compliant Total: 9										
1 - ClinicOne										
Clinic Non Compliant Total: 8										
	10	Infant	114114	Darlene Allen	14	Client Preference	3/2/2007	No	No	No
	20	Breastfeeding	114114	Elizabeth Jones	23	Client Preference	6/23/1983	No	No	No
	20	Child	230230	Justin Myers	31	Client Preference	10/10/2004	No	No	No
	10	Child	333988	Meghan Sloan	16	Staffing Issue	11/3/2003	No	No	Yes
	10	Pregnant	412786	Celia Nunez	18	Client Preference	4/16/1985	No	No	No
2 - ClinicTwo										
Clinic Non Compliant Total: 4										
	10	Pregnant	123123	Maya Fletcher	15	Staffing Issue	1/2/1988	No	No	No
	10	Child	309309	Graham Bridges	18	Client Preference	5/19/2004	No	Yes	No
	20	Not Breastfeeding	489489	Anna Landes	28	Staffing Issue	8/8/1981	No	No	No
	10	Infant	489489	Samantha Landes	19	Client Preference	2/15/2007	No	No	No