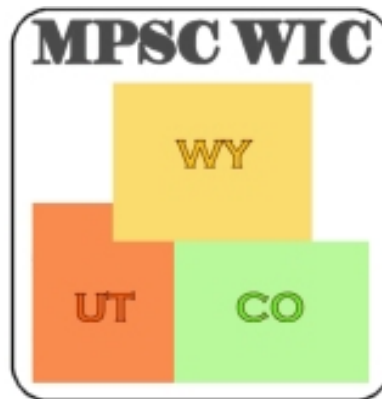

Mountain Plains States Consortium WIC System Project

DETAILED FUNCTIONAL DESIGN DOCUMENT VM 1 VENDOR MANAGEMENT DETAILS SCREENS

Presented to:



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Document Revisions

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1 Details

The Details branch node of the Vendor Management navigation tree allows the user to record information related to each vendor, such as demographic data, contact information, operation details, wholesalers, and sales and peer group information. The branch also contains options for viewing summary information about a vendor, including vendor status, events, and violations.

1.1 Demographics

The Demographics screen is used to enter, edit, or view demographic information about the vendor such as the name and address. An owner or a chain is also assigned on this screen. The local staff person at a clinic that is the main contact for the vendor is maintained here. The Contacts grid is used to enter, edit, or view contact information for the displayed vendor. The screen is in edit mode when it is displayed. There is no historical data for the demographic information on this screen.

- > *New Vendor (see VM Overview DFDD)* **OR**
- > *Search (click on Vendor ID in Search Results – see VM Overview DFDD)* **OR**
- > *Details > Demographics*

<Vendor Header (See VM overview)>

Demographics

*Vendor ID: 09696 *Vendor Name: Dave's Shameless Honey M Vendor Alias: DSHM Farmer

*Local Agency: 22 Davis County Chain: Owners: SHAUM, R JACK Participates in FMNP

Address Types Physical 1 of 2 + New Edit X Delete

Address Type: Physical Address to Use: Owner

Address Line 1: Physical Add Line 1 City: Altamont State: Utah Zip Code: 84001 (+4) County: Duchesne

Location: Suite: P. O. Box: *Address Types on File: Physical, Mailing, Owner Mailing, Chain Associator, Wholesalers Mail

Current Vendor Address: Physical Add Line 1, Altamont, UT 84001

LA Retail Coordinator: George Little LA Retail Coordinator Phone: (717) 797-9797

Contact Information							
First Name	Last Name	Type	Title	Phone Number	Fax Number	Email Address	Address Type
Betty	Smith	Corporat...		(717) 654-6546	(717) 654-6546		Mailing
Jimmy	Henson	Primary		(717) 434-3434	(717) 343-4343		Mailing

Control	Description			
Vendor ID	The ID of the vendor. It must be unique.			
	Type	Text Box		
	Required	Yes		
	Length	5		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	Vendor.FFVendorID		
Vendor Name	The name of the vendor. It cannot be equal to the Vendor Alias Name.			
	Type	Text Box		
	Required	Yes		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	Vendor.StoreName		
Vendor Alias Name	An alias for the Vendor Name. It cannot be equal to the Vendor Name.			
	Type	Text Box		
	Required	No		
	Length	50		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	Vendor.AliasName		
Farmer	This check box signifies whether or not the vendor is a farmer.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	Vendor.FarmerIn		
Local Agency	The primary local agency that the vendor services.			
	Type	List Box		
	Required	Yes		
	DB Column	Vendor.LA_ID		
	Code ID	LocalAgency table lookup		

Control	Description			
Chain	List box containing the chain that can be selected and associated with the vendor. List is populated with all active chains.			
	Type	List Box		
	Required	No		
	DB Column	Vendor.Chain_ID VendorChain.Name		
	Code ID	VendorChain table lookup		
Owners	List box containing the owner that can be selected and associated with the vendor. List is populated with all active owners.			
	Type	List Box		
	Required	No		
	DB Column	Vendor.VOwn_ID		
	Code ID	VendorOwner table lookup		
Participates in FMNP	This check box signifies whether or not the vendor participates in the Farmer Market Nutrition Program (FMNP).			
	Type	Check Box		
	Display Only	Yes, unless Farmer is checked	Calculated	No
	DB Column	Vendor.FMNPIIn		
Address Types	This is the record selector for the Address Types that are available to be associated with a Vendor. The drop-down and spin control allow selection of other Address Types.			
	Type	Record Selector		
	Contents	Address Types		
	DB Column	VendorAddress.AddressTypeCd		
New	Clicking the New command button creates a new address record.			
	Type	Command Button		
	Hot Key	Alt + N		
Edit	Clicking the Edit command button puts the currently displayed address record into Edit mode.			
	Type	Command Button		
	Hot Key	Alt + T		

Control	Description	
Delete	Clicking the Delete command button marks the currently displayed address record as deleted in the database upon user confirmation.	
	Type	Command Button
	Hot Key	Alt + D
Address Type	Address Type is used to select the type of address for the selected Vendor that the user wants to view, edit or add..	
	Type	List Box
	Required	Yes
	DB Column	VendorAddress.AddressTypeCd
	Code ID	Address Type This code element is editable but these installed values are non-editable: Physical Mailing
Address to Use	The address information that the Vendor uses for the selected address type. The vendor can use its own address, its owner's address or its chain's address.	
	Type	List Box
	Required	Yes
	DB Column	VendorAddress.AddressUseCd
	Code ID	Address Use This code element is non-editable. The installed values are: Owner Vendor Chain

Control	Description			
Address Types on File	Address Types on File is used to indicate the types of addresses on file for the displayed Vendor. The available rows are determined by the Code ID. The address types on file are indicated by the checkbox being checked. The physical address is the default.			
	Type	Read Only List Box		
	Required	Yes - At least one Physical address is required		
	DB Column	VendorAddress.AddressTypeCd		
	Code ID	Address Type This code element is editable but these installed values are non-editable: Physical Mailing		
Address Line 1	The first line of the vendor address. Either Address Line 1 must contain a value or P.O. Box must contain a value to have a valid address.			
	Type	Text Box		
	Required	Yes – If no data in P.O. Box		
	Length	30		
	Validation	NA		
	Display Only	Yes, if Use Vendor's address is not selected.	Calculated	No
	DB Column	VendorAddress.StreetAddrLine1		
Address Line 2	The second, optional line of a WIC vendor address. It cannot contain data if Address Line 1 is blank.			
	Type	Text Box		
	Required	No		
	Length	30		
	Validation	NA		
	Display Only	Yes, if Use Vendor's address is not selected.	Calculated	No
	DB Column	VendorAddress.StreetAddrLine2		

Control	Description			
Location	Location is where additional information regarding the physical location of the vendor, such as cross streets, can be stored.			
	Type	Text Box		
	Required	No		
	Length	50		
	Validation	NA		
	Display Only	Yes, if Use Vendor's address is not selected.	Calculated	No
	DB Column	VendorAddress.Location		
Suite	The suite of a vendor address.			
	Type	Text Box		
	Required	No		
	Length	5		
	Validation	NA		
	Display Only	Yes, if Use Vendor's address is not selected.	Calculated	No
	DB Column	VendorAddress.Suite		
P.O. Box	The Post Office Box number of a vendor address. Either Address Line 1 must contain a value or P.O. Box must contain a value in order to have a valid address. This field is disabled if the Address Type = "Physical."			
	Type	Text Box		
	Required	Yes – If no data in address line 1		
	Length	5		
	Validation	NA		
	Display Only	Yes, if Use Vendor's address is not selected.	Calculated	No
	DB Column	VendorAddress.POBox		

Control	Description				
City	The City component of the vendor address. When a valid ZIP Code is entered, the City is automatically populated based on the ZIP Code. If a valid ZIP Code has more than one possible City, the choices are displayed in a pop-up window where the user must select the correct value.				
	Type	Text Box			
	Required	Yes			
	Length	30			
	Validation	NA			
	Display Only	Yes, if Use Vendor's address is not selected.	Calculated	No	
	DB Column	VendorAddress.City			
State	The State field identifies the state of the owner/ACH address. When a valid ZIP Code is entered, the State is automatically populated based on the ZIP Code.				
	Type	List Box			
	Required	Yes			
	DB Column	VendorAddress.State			
	Code ID	State table lookup (StateAbbreviation field)			
Zip Code	The 5-digit ZIP Code of the vendor address. When a valid ZIP Code is entered, the City, State and County fields are automatically populated based on the ZIP Code. If a valid ZIP Code has more than one possible City and/or County value, the choices are displayed in a pop-up window where the user must select the correct value.				
	Type	Text Box			
	Required	Yes			
	Length	5			
	Validation	Numeric and Complete			
	Display Only	Yes, if Use Vendor's address is not selected.	Calculated	No	
	DB Column	VendorAddress.ZipCode			

Control	Description			
(+4)	The optional, 4-digit ZIP Code extension of a vendor address.			
	Type	Text Box		
	Required	No		
	Length	4		
	Validation	Numeric and Complete		
	Display Only	Yes, if Use Vendor's address is not selected.	Calculated	No
	DB Column	VendorAddress.ZipPlus4		
County	The county where the vendor is located. When a valid ZIP Code is entered, the County field is automatically populated based on the ZIP Code. If a valid ZIP Code has more than one possible County, the choices are displayed in a pop-up window where the user must select the correct value.			
	Type	List Box		
	Required	Yes		
	DB Column	VendorAddress.CountyNm		
	Code ID	County table lookup (Name field)		
Current Vendor Address	Current vendor address is the displayed address formatted to display like a mailing label.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	NA		
	Display Only	Yes	Calculated	No
	DB Column	VendorAddress.StreetAddrLine1, VendorAddress.StreetAddrLine2, Vendor.Suite, VendorAddress.POBox, VendorAddress.City, VendorAddress.State, VendorAddress.ZipCode, VendorAddress.ZipPlus4		
Add Row	Clicking the Add Row button creates a new row in the Contacts data grid and allows the user to complete the information about the vendor contact.			
	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 and marks the currently selected row (arrow pointer) as deleted in the database.			
	Type	Command Button		
	Hot Key	Alt + R		
LA Retail Coordinator	The name of the LA Retail Coordinator for the Vendor.			
	Type	Text Box		
	Required	No		
	Length	40		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	Vendor.RetailCoordinator		
LA Retail Coordinator Phone	The phone number of the LA Retail Coordinator. The first field is the area code. If the Default Area Code system parameter contains a value, that value is placed into the area code field by default.			
	Type	Text Box		
	Required	No		
	Length	10		
	Validation	Numeric and Complete, Mask of (999) 999-9999		
	Display Only	No	Calculated	No
	DB Column	Vendor.ContactPhoneNr + Vendor.ContactAreaCd		
First Name	The first name of the contact for the vendor.			
	Type	Text Box		
	Required	No		
	Length	30		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	VendorContact.FirstName		

Control	Description			
Last Name	The last name of the contact for the vendor.			
	Type	Text Box		
	Required	No		
	Length	30		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	VendorContact.LastName		
Type	Contact Type is used to select the type of contact being entered for the vendor. Types include: Primary, and others as designated.			
	Type	List Box		
	Required	There must be a primary contact type for the Physical Address.		
	DB Column	VendorContact.ContactTypeCd		
	Code ID	Contact Type This code element is editable but these installed values are non-editable: Primary		
Title	The title given to the contact person for the vendor and contact type.			
	Type	Text Box		
	Required	No		
	Length	30		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	VendorContact.ContactTitle		
Phone Number	The vendor's 10-digit business phone number, including area code. The first field is the area code. If the Default Area Code system parameter contains a value, that value is placed into the area code field by default.			
	Type	Text Box		
	Required	No		
	Length	10		
	Validation	Numeric and Complete, Mask of (999) 999-9999		
	Display Only	No	Calculated	No
	DB Column	VendorContact.BusPhoneAreaCd + VendorContact.BusPhoneNr		

Control	Description			
Fax Number	The vendor's 10-digit fax phone number, including area code. The first field is the area code. If the Default Area Code system parameter contains a value, that value is placed into the area code field by default.			
	Type	Text Box		
	Required	No		
	Length	10		
	Validation	Numeric and Complete, Mask of (999) 999-9999		
	Display Only	No	Calculated	No
	DB Column	VendorContact.FaxPhoneAreaCd + VendorContact.FaxPhoneNr		
Email Address	The email address of the contact for the vendor and contact type. The address must contain [@] and [.].			
	Type	Text Box		
	Required	No		
	Length	50		
	Validation	xxxx@xxx.xxx , "@" and "." must be present.		
	Display Only	No	Calculated	No
	DB Column	VendorContact.EmailAddress		
Address Type	Address Type is used to select the type of address being entered of the contact for the vendor and contact type			
	Type	List Box		
	Required	Yes		
	DB Column	VendorContact.AddressTypeCd		
	Code ID	Address Type This code element is editable but these installed values are non-editable: Physical Mailing		

Business Rules
<ol style="list-style-type: none"> 1. Tab order for address goes from Address Line 1 to the Zip Code field. This tab order allows the user to use the automatic zip code database that is incorporated in the data system. 2. The Local Agency Name and Number are found by joining the LA_ID from the Vendor table to the LA_ID of the Local Agency table. 3. Either Street Address Line 1 or PO Box must be present for a valid address.

Business Rules

4. Pop-up window must be shown when the zip code entered contains more than one city or county.
5. If the user selects Use Owner's Address, display the corresponding address data from the owner's address record. This address must be of the same Address type as the one selected for the vendor. When Use Owner's Address is selected, the corresponding fields on the vendor address are read-only.
6. If the user selects Use Owner's Address and the owner does not have the selected Address Type, display an error message.
7. If the user selects Use Owner's Address and the Owner's address changes, the same change(s) will be made to the Vendor's address.
8. If the user selects Use Chain's Address, display the corresponding address data from the chain's address record. This address must be of the same Address type as the one selected for the vendor. When Use Chain's Address is selected, the corresponding fields on the vendor address are read-only.
9. If the user selects Use Chain's Address and the chain does not have the selected Address Type, display an error message.
10. If the user selects Use Chain's Address and the Chain's address changes, the same change(s) will be made to the Vendor's address.
11. If the user does not select Use Owner's Address or Use Chain's Address, or they deselect it, clear the address fields and enable them for data entry.
12. If the address type for a selected address changes and there is a corresponding contact for the address type in the contacts grid, display error. For example, if an address type is changed from being a Mailing address to a Physical address, and there is a contact for the Mailing address in the contacts grid, display error.
13. For all vendor correspondence that includes a contact name, if the contact has an Address Type selected, that address type is used on the letter. If the address type is blank, use the mailing address of the vendor. If the mailing address does not exist for the vendor, use the physical address.
14. Only a chain or an owner can be assigned to the vendor. If a chain is selected, the owner list box is disabled; conversely, if an owner is selected, the chain list box is disabled.
15. If an active vendor is assigned a new owner, display warning message that the vendor should be terminated and a new application entered for the vendor with information regarding the new owner.
16. The Vendor Name cannot equal the Vendor Owner Alias Name. Display error.
17. If the Vendor Alias Name exists for another Vendor Alias Name, display warning.
18. If the Vendor Alias Name exists for another Vendor Name, display warning.
19. The date that the vendor is added (Vendor.InsertDt) is used for the TIP report to determine if the Vendor is a New Vendor (Position 19 in TIP file).
20. The P O Box field is disabled if the Address Type = "Physical."
21. If a vendor has an address type of 'Mailing,' that address is used for correspondence; otherwise, the 'Physical' address is used. If a vendor contact name is used in the correspondence, the Vendor Contact Name that is used is the contact who corresponds with the address type.
22. There is only one Primary contact for each address type. Display error. Each address type can have a different Primary contact.

Business Rules

23. The Local Vendor Contact defaults to the Local Agency Retail Coordinator for the selected vendor's local agency. This field can be edited by the user.
24. If an address type is selected in the Contact Information grid that does not have a corresponding address in the address area, display error. For example, if Mailing is selected for a row in the Contact Information grid, but no Mailing address is present in the address area, display error.
25. The records in the grid are sorted by Address Type, then Contact Type within Address Type.
26. The Vendor ID is displayed in the header information (Refer to VM 0 Vendor Management Overview DFDD).
27. Address Line 2 cannot contain data if Address Line 1 is blank. Display error.
28. Display error if Vendor ID is not unique.
29. The Vendor ID is displayed in the format 99999 (zeroes not suppressed).
30. Display error if an Address Type is being added that already exists for the Vendor.
31. Display error if an Address Type is being changed to an Address Type that already exists for the Vendor.
32. Always default to the physical address, if one exists. If no physical address exists, default to the mailing address; otherwise display in the Sort Order of the Address Type Code.
33. Display error if Owner is selected for "Address to use" and an owner is not associated with the Vendor.
34. Display error if Chain is selected for "Address to use" and a chain is not associated with the Vendor.
35. Display error if an address type is being deleted when there is a row in the grid with the same address type.
36. Participates in FMNP checkbox is visible only if the system parameter ClinicServices.UseFarmersMarket is set to Yes.
37. Disable and clear Participates in FMNP Checkbox if the Farmer checkbox is not checked.

Developer Notes

1. When a Vendor Detail record is added, a Vendor Status record is added with a Vendor Status Code of "Pending" and a Status Change Reason Code of "Contacted by Vendor."
2. Concatenate the Local Agency ID with a "-" and the name of the Local Agency.
3. Each address type entered is placed into the address collection for the vendor. When the Address Type Code list is displayed, place a check in each address type where appropriate.
4. There are no historical records for the addresses. When an edit is done on an existing address the data is replaced within the database records.
5. The code to be used for the email validation is:


```
Dim ex As New Regex("^(\\w-\\.]+)@(\\[[0-9]{1,3}\\.[0-9]{1,3}\\.[0-9]{1,3}\\.|((\\w-]+\\.)+))([a-zA-Z]{2,4}|[0-9]{1,3})(\\)?$")
If Not ex.IsMatch(EmailAddress.Value)
```

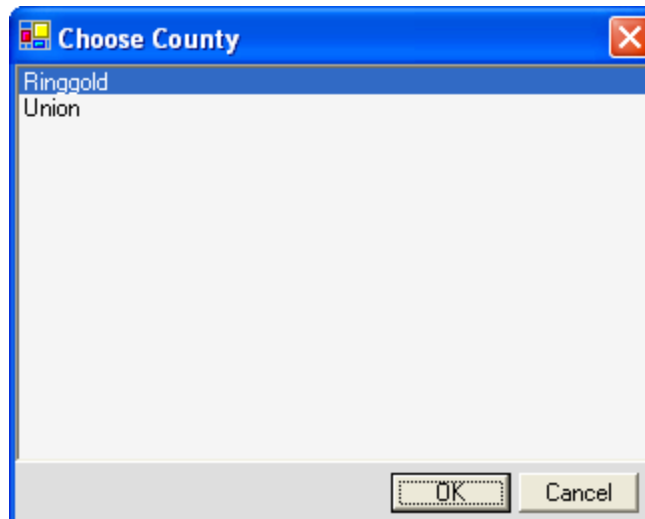
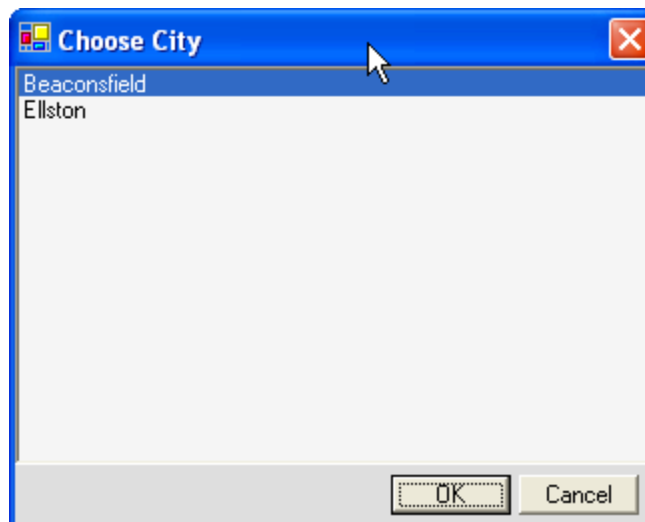
Developer Notes

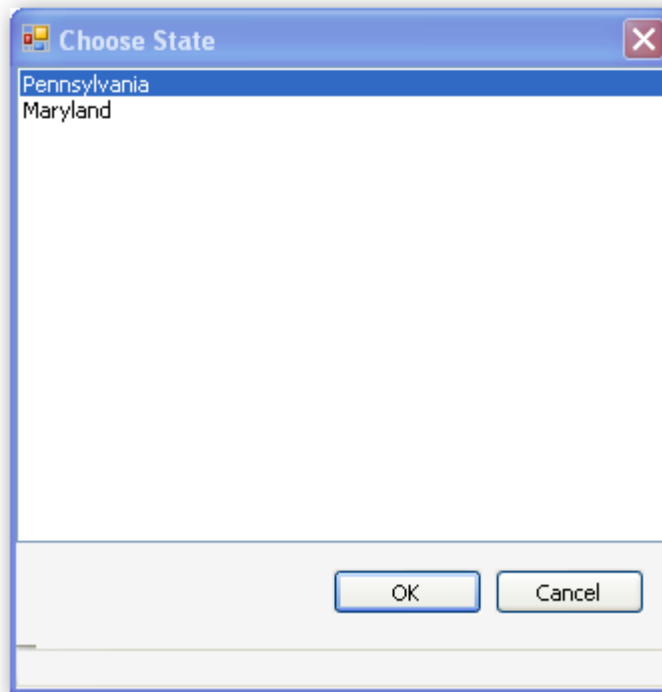
Then
'It is invalid
End IF

6. For the formatted address use the following:
Address Line 1 (or PO Box)
Address Line 2 (or Suite if present when there is no Address Line 2)
Suite (if present and Address Line 2 is present)
City, State Zip – Zip Plus 4 (if present)

1.1.1 Choose City/County/State Pop-Up Windows

The Choose City/County/State pop-up windows allow the user to select which City/County/State the vendor should be associated with. Within the ZIP+4 data base, some zip codes cover multiple cities or counties.





1.2 Operations

The Operations screen is used to maintain basic information about the vendor, such as the business year, hours and times of operation and, for users with the proper security access, automated clearing house information.

> Details > Operations

<Vendor Header (See VM overview) >

Record Date 06/15/2007 < 1 of 99 > New Edit Delete

Business Year Start 01/01 Business License No. 245679896846355 Food Stamp ID 5600836
 Business Year End 12/31 Business State Colorado TIP Vendor Type Retail Vendor
 Tax ID 135765635897354 # EBT Lanes 3
 Print Price Surveys Vendor Has Scanners Yes
 Scanners ID WIC Foods No

Days and Times of Operation

Days 24 Hours Same Each Day

Days	Begin Time	End Time
<input checked="" type="checkbox"/> All Days		
<input checked="" type="checkbox"/> Sunday		
<input checked="" type="checkbox"/> Monday		
<input checked="" type="checkbox"/> Tuesday		
<input checked="" type="checkbox"/> Wednesday		
<input checked="" type="checkbox"/> Thursday		
<input checked="" type="checkbox"/> Friday		
<input checked="" type="checkbox"/> Saturday		

Automated Clearing House

Participating in ACH Transactions

ACH Data To Use Owner's ACH Data

Bank Name Central Bank of Colorado

Routing Number 109203999

Account Number 0909908787667666

Control	Description	
Record Date	This is the record selector for the Vendor Operations records. It contains the recorded date. The drop-down and spin control allow selection of historical Vendor Operations records. When the New button is clicked, this date defaults to current date. It can be updated by the user.	
	Type	Record Selector (using Editable Date Picker)
	Contents	Formatted date of 'mm/dd/yyyy'
	DB Column	VendorOperations.RecordedDt
New	Clicking the New command button creates a new Vendor Operations record.	
	Type	Command Button
	Hot Key	Alt + N

Control	Description			
Edit	Clicking the Edit command button puts the currently displayed record into Edit mode.			
	Type	Command Button		
	Hot Key	Alt + T		
Delete	Clicking the Delete command button marks the record as deleted in the database upon user confirmation.			
	Type	Command Button		
	Hot Key	Alt + D		
Business Year Start	This date is the start date for the business year of the vendor.			
	Type	Date Picker		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.BusinessYearStartDt		
Business Year End	This date is the end date for the business year of the vendor.			
	Type	Date Picker		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.BusinessYearEndDt		
Business License No.	This text box contains the business license number for the vendor.			
	Type	Text Box		
	Required	No		
	Length	30		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.LicenseNr		
Business State	This list box contains the state in which the vendor does business.			
	Type	List Box		
	Required	No		
	DB Column	VendorOperations.StateAbbreviation		
	Code ID	State table lookup		

Control	Description			
Tax ID	Contains the Federal Tax ID of a corporation or partnership, or the social security that identifies a sole proprietorship.			
	Type	Text Box		
	Required	No		
	Length	15		
	Validation	NA		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.TaxID		
Print Price Surveys	This check box signifies whether or not the vendor normally receives price surveys through the mail instead of by other means. This checkbox is used on the Setup Survey Screen when printing price surveys. The value of this checkbox is the default value on the Setup Survey Screen. It can be modified when printing the surveys.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.PriceSurveyPrintIn		
Food Stamp ID	An identification number assigned to a vendor by the Food Stamp program. If entered, it must be 7 digits. This ID is used when producing the TIP Report.			
	Type	Text Box		
	Required	No		
	Length	7		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.FoodStampID		

Control	Description			
TIP Vendor Type	Indicates the USDA's "The Integrity Program" (TIP) vendor type for the current vendor. Examples of TIP Vendor Type are Retail Vendor, Commissary and Pharmacy. This field is used when producing the TIP Report.			
	Type	List Box		
	Required	Yes		
	DB Column	VendorOperations.TipStoreTypeCd		
	Code ID	TIP Store Type This code element is non-editable. The installed values are: Retail (R) WIC-only (W) Above 50% (A) Commissary (C) Pharmacy (P) Home Delivery (H) Direct Distribution Center (D) Farmer		
# EBT Lanes	The number of EBT lanes located at the WIC vendor.			
	Type	Text Box		
	Required	No		
	Length	Integer 2		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.EBTLanesNr		
Vendor Has Scanners	A list box used to indicate whether or not the vendor is equipped with scanners.			
	Type	List Box		
	Required	Yes		
	DB Column	VendorOperations.ScannersCd		
	Code ID	YesNo This code element is non-editable. The installed values are: Yes No		

Control	Description			
Scanners ID WIC Food	A list box used to indicate that scanners, when present, are able to identify WIC approved foods.			
	Type	List Box		
	Required	Yes – if Vender Has Scanners is Yes		
	DB Column	VendorOperations.ScansWICFoodsCd		
	Code ID	YesNo This code element is non-editable. The installed values are: Yes No		
Days and Times of Operation	The frame on the screen that indicates the hours and days of operation of the vendor.			
All Days	This check box signifies whether or not a vendor is open seven days a week.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.SundayIn + VendorOperations.MondayIn + VendorOperations.TuesdayIn + ... VendorOperations.SaturdayIn		
Sunday	This check box signifies whether or not a vendor is open on Sunday.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.SundayIn		
Monday	This check box signifies whether or not a vendor is open on Monday.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.MondayIn		
Tuesday	This check box signifies whether or not a vendor is open on Tuesday.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.TuesdayIn		

Control	Description			
Wednesday	This check box signifies whether or not a vendor is open on Wednesday.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.WednesdayIn		
Thursday	This check box signifies whether or not a vendor is open on Thursday.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.ThursdayIn		
Friday	This check box signifies whether or not a vendor is open on Friday.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.FridayIn		
Saturday	This check box signifies whether or not a vendor is open on Saturday.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.SaturdayIn		
24 Hours	This check box signifies whether or not a vendor is open 24 hours a day.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	VendorOperations.AllDayIn		
Same Each Day	This check box signifies whether or not a vendor has the same operating hours each day.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	NA		
All Days - Begin Time	The time the vendor opens when Same Each Day is checked.			
	Type	List Box		
	Required	No		
	DB Column	VendorOperations.AllWeekBeginTime		

Control	Description	
All Days - End Time	The time the vendor closes when Same Each Day is checked.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.AllWeekEndTime
Sunday Begin Time	The time the vendor opens on Sunday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.SundayBeginTime
Sunday End Time	The time the vendor closes on Sunday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.SundayEndTime
Monday Begin Time	The time the vendor opens on Monday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.MondayBeginTime
Monday End Time	The time the vendor closes on Monday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.MondayEndTime
Tuesday Begin Time	The time the vendor opens on Tuesday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.TuesdayBeginTime
Tuesday End Time	The time the vendor closes on Tuesday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.TuesdayEndTime
Wednesday Begin Time	The time the vendor opens on Wednesday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.WednesdayBeginTime

Control	Description	
Wednesday End Time	The time the vendor closes on Wednesday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.WednesdayEndTime
Thursday Begin Time	The time the vendor opens on Thursday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.ThursdayBeginTime
Thursday End Time	The time the vendor closes on Thursday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.ThursdayEndTime
Friday Begin Time	The time the vendor opens on Friday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.FridayBeginTime
Friday End Time	The time the vendor closes on Friday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.FridayEndTime
Saturday Begin Time	The time the vendor opens on Saturday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.SaturdayBeginTime
Saturday End Time	The time the vendor closes on Saturday.	
	Type	List Box
	Required	No
	DB Column	VendorOperations.SaturdayEndTime
Automated Clearing House	Group box that contains information regarding Automated Clearing House (ACH) information. The group box is only available for users that have been assigned to the appropriate role that allows access to the ACH information.	

Control	Description			
Participating in ACH Transactions	Checkbox that indicates the vendor is participating in automated clearing house transactions. Defaults to checked for EBT state.			
	Type	Checkbox		
	Required	Yes, if EBT State		
	DB Column	VendorOperations.ACHIn		
ACH Data To Use	The Banking information that the Vendor uses if it participates in ACH transactions. It is only available if "Participating in ACH Transactions" has been selected.			
	Type	List Box		
	Required	Non-EBT State: Yes, if "Participating in ACH Transactions" has been selected. EBT State: Yes.		
	DB Column	VendorOperations.ACHDataCd		
	Code ID	ACH Info This code element is non-editable. The installed values are: Vendor Chain Owner		
Bank Name	The name of the vendor's bank that is used when processing automated clearing house transactions. It is only available if "Participating in ACH Transactions" has been selected.			
	Type	Text Box		
	Required	Non-EBT State: Yes, if "Participating in ACH Transactions" has been selected. EBT State: Yes.		
	Length	30		
	Validation	NA		
	Display Only	Yes, if Use Owner's/ACH Bank Account or Use Chain's Bank Account Info is checked.	Calculated	No
	DB Column	VendorOperations.ACHBankName		

Control	Description			
Routing Number	The routing number of the vendor's bank that is used when processing automated clearing house transactions. It is only available if "Participating in ACH Transactions" has been selected.			
	Type	Text Box		
	Required	Non-EBT State: Yes, if "Participating in ACH Transactions" has been selected. EBT State: Yes.		
	Length	9		
	Validation	NA		
	Display Only	Yes, if Use Owner's/ACH Bank Account or Use Chain's Bank Account Info is checked.	Calculated	No
DB Column	VendorOperations.ACHRoutingNumber			
Account Number	The bank account number of the vendor's bank that should be used when processing automated clearing house transactions. It is only available if "Participating in ACH Transactions" has been selected.			
	Type	Text Box		
	Required	Non-EBT State: Yes, if "Participating in ACH Transactions" has been selected. EBT State: Yes.		
	Length	17		
	Validation	NA		
	Display Only	Yes, if Use Owner's/ACH Bank Account or Use Chain's Bank Account Info is checked.	Calculated	No
DB Column	VendorOperations.ACHAccountNumber			

Control	Description			
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the vendor operations 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	VendorOperations.ModifyStfpID VendorOperations.ModifyDt		

Business Rules
<ol style="list-style-type: none"> 1. When New is selected and there is an existing Vendor Operations record, all data fields are populated with the values from the most recent existing Vendor Operations record. The record date is the date that the New button is clicked. 2. Business Year End cannot be before Business Year Start. 3. Business Year End cannot be entered if there is no Business Year Start. 4. If Vendor has Scanners = "yes" the field "Scanners ID WIC Foods" is enabled and required. 5. If "All Days" is checked, the Sunday through Saturday check boxes are selected automatically; if unchecked, the Sunday through Saturday check boxes are not automatically deselected; if any of the Sunday through Saturday check boxes is unchecked, the "All Days" will be unchecked. 6. If 24 hours is checked, all begin and end times are disabled and 'Same Each Day' is selected and disabled. If unchecked, all begin and end times are enabled and 'Same Each Day' is unchecked and enabled. 7. If "Same Each Day" is checked, select "Add Days" and the Sunday through Saturday check boxes. Disable "Add Days" and the Sunday through Saturday check boxes and all the Begin Time and End Time except Sunday. The Begin Time and End Time for Sunday is enabled. Populate the Begin and End Time for the remainder of the week based on what is populated in the Begin and End Times for Sunday. 8. If a day is deselected that contains begin/end times, the times will be cleared out. 9. End times cannot precede begin times. Display error. 10. For non-EBT State, if Participating in ACH Transactions is selected, "ACH Data to Use" is enabled; otherwise, it is disabled. 11. For EBT State, Participating in ACH Transactions defaults to selected and it cannot be deselected. 12. If ACH Data to Use = Owner's ACH Info, Bank Name, Routing Number and Account Number is filled in from the Owner's record, and the fields are disabled. If no owner's data exists, display a warning message. The ACH data cannot be saved without data in the ACH fields.

Business Rules
13. If ACH Data to Use = Chain's ACH Info, Bank Name, Routing Number and Account Number are populated from the Chain's record, and the fields are disabled. If no chain's data exists, display a warning message. The ACH data cannot be saved without data in the ACH fields.
14. If ACH Data to Use = Vendor's ACH Info, Bank Name, Routing Number and Account Number are enabled and required.
15. If the Food Stamp ID entered matches the Food Stamp ID for any other vendor present in the system, display a warning. The use of duplicate Food Stamp IDs is permitted.
16. If the Food Stamp ID is entered, it must be 7 digits. Display error.
17. In order for the ACH data to be accessible to only users with the proper security permissions, the Execute Level for the Task 'ACH Data' must be contain the same value as the Change Level for the Data 'Operations.'
18. Display an error if the TIP Vendor Type selected is Farmer and the vendor is not designated as a farmer (on Demographics screen). TIP does not recognize the type of Farmer.

Developer Notes
1. All Begin and End time list boxes are populated in the format of HH:MM AM/PM. The interval to use when generating the list is one hour (beginning at 12:00 AM and ending at 12:00 PM).

1.3 Vendor's Wholesalers

The Vendor's Wholesalers screen is used to maintain Wholesalers that do business with the selected vendor.

> *Details* > *Vendor's Wholesalers*

<Vendor Header (See VM overview)>



Control	Description	
Formula Wholesalers	The Formula Wholesalers box represents formula wholesalers. If the box is checked, it is attached to this vendor. This means that a vendor gets formula from the wholesaler.	
	Type	Checkboxes
	Required	No
	DB Column	VendorWholesaler.Vend_ID
	Code ID	Wholesaler table lookup
Wholesalers	The Wholesalers box represents grocery/pharmacy wholesalers. If the box is checked, it is attached to this vendor. This means that a vendor gets either groceries/pharmacy supplies from the wholesaler.	
	Type	Checkboxes
	Required	No
	DB Column	VendorWholesaler.Vend_ID
	Code ID	Wholesaler table lookup

Business Rules
<ol style="list-style-type: none"> 1. Only those active wholesalers marked as being a formula wholesaler on the wholesaler screen will be included in the Formula Wholesalers list. 2. Only those active wholesalers marked as being as grocery wholesaler or pharmacy wholesaler on the wholesaler screen will be included in the Wholesalers list.

Developer Notes
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1.4 Sales

The Sales screen is used to maintain sales information for the vendor, such as the food stamp sales, food stamp eligible sales, calendar YTD WIC sales, and previous calendar month WIC sales. There also are some calculated fields that compare the WIC sales versus the food stamp sales and food stamp eligible sales.

> Details > Sales

<Vendor Header (See VM overview) >

Record Date: 06/15/2007 [dropdown] [spin] [1 of 99] [New] [Edit] [Delete]

Calendar YTD WIC Sales: \$334,119.20 Previous Calendar Month WIC Sales: Apr 2007 \$77,868.12 Last Calendar Year WIC Sales: \$934,418.00

Calculate Comparisons Begin Date: 01/01/2007 [dropdown] End Date: 1/31/2007 [dropdown]

Food Stamp Sales: \$8,123.10 FS Eligible Sales: \$12,110.10

WIC Sales: \$3,223.30 WIC Sales vs. Food Stamp Sales: 40% WIC Sales vs. FS Eligible Sales: 27%

Proof of FS Eligible Sales: [dropdown]

Control	Description	
New	Clicking the New command button creates a new Sales record.	
	Type	Command Button
	Hot Key	Alt + N
Edit	Clicking the Edit command button enables all editable fields within the Sales screen for update.	
	Type	Command Button
	Hot Key	Alt + T
Delete	Clicking the Delete command button marks the record as deleted in the database upon user confirmation.	
	Type	Command Button
	Hot Key	Alt + D
Record Date	This is the record selector for the Vendor Sales records. It contains the recorded date. The drop-down and spin control allow selection of historical Vendor Sales records. When the New button is clicked, this date defaults to the current date. It can be updated by the user.	
	Type	Record Selector (using Editable Date Picker)
	Contents	Formatted date of "mm/dd/yyyy"
	DB Column	VendorSales.RecordedDt

Control	Description			
Calendar YTD WIC Sales	The year-to-date sales of WIC foods as measured by the accumulation of redemptions. This is the accumulation of sales from the first day of the calendar year of the record date up until the last time the WIC Sales batch job was run.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of \$9,999.99		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Previous Calendar Month WIC Sales	The previous month's WIC sales. The previous calendar month is defined as the most recent month created by the Vendor Monthly Sales batch job that was run prior to the Record Date.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of mmm yyyy \$99,999.99 (mmm is the month and yyyy is the year.		
	Display Only	Yes	Calculated	No
	DB Column	NA		
Last Calendar Year WIC Sales	The total sales of WIC foods as measured by the accumulation of redemptions for the last calendar year. The last calendar year is defined as the most recent January through December sales amounts prior to the Record Date.			
	Type	Text Box		
	Required	No		
	Length	NA		
	Validation	Mask of \$9,999.99		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Calculate Comparisons	Clicking the Calculate Comparisons command button calculates the WIC Sales vs Food Stamp Sales if Food Stamp Sales were entered. The WIC Sales vs FS Eligible Sales is calculated if FS Eligible Sales were entered. The WIC Sales is calculated in either case. This command button is not enabled until a valid time period has been entered and either the Food Stamp Sales or the FS Eligible Sales have been entered.			
	Type	Command Button		
	Hot Key	Alt + L		

Control	Description			
Begin Date	This date marks the begin date for which the calculations are to be applied. It must be the first day of a month.			
	Type	Date Picker		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	VendorSales.SalesBeginDt		
End Date	This date marks the end date for which the calculations are to be applied. It must be the last day of a month.			
	Type	Date Picker		
	Required	No		
	Display Only	No	Calculated	No
	DB Column	VendorSales.SalesEndDt		
Food Stamp Sales	The Vendor's total food stamp sales.			
	Type	Text Box		
	Required	No		
	Length	Decimal 11,2		
	Validation	Numeric, Mask of \$9,999.99		
	Display Only	No	Calculated	No
	DB Column	VendorSales.FoodStampSales		
FS Eligible Sales	The Vendor's total sales of food stamp eligible items. May be used in Peer Group calculation.			
	Type	Text Box		
	Required	No		
	Length	Decimal, 11,2		
	Validation	Numeric, Mask of \$9,999.99		
	Display Only	No	Calculated	No
	DB Column	VendorSales.EligibleFoodSales		
WIC Sales	The total sales of WIC foods as measured by the accumulation of redemptions during the Begin and End Dates entered.			
	Type	Text Box		
	Required	No		
	Length	Decimal, 11,2		
	Validation	Numeric, Mask of \$9,999.99		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		

Control	Description			
WIC Sales vs. Food Stamp Sales	The percentage of the vendor's WIC sales versus the vendor's food stamp sales as calculated by dividing the total WIC sales by the food stamp sales for the time period entered in the Begin Date and End Date fields. The calculation is performed if a value is entered in the Food Stamp Sales field and the Calculation Comparisons command button is selected.			
	Type	Text Box		
	Required	No		
	Length	3		
	Validation	Mask of 99%		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
WIC Sales vs. FS Eligible Sales	The percentage of the vendor's WIC sales versus the vendor's food stamp eligible sales as calculated by dividing the total WIC sales by the food stamp eligible sales for the time period entered in the Begin Date and End Date fields. The calculation is performed if a value is entered in the FS Eligible Sales field and the Calculation Comparisons command button is selected.			
	Type	Text Box		
	Required	No		
	Length	3		
	Validation	Mask of 99%		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		
Proof of FS Eligible Sales	This box represents the Vendor's proof of FS Eligible Sales.			
	Type	List Box		
	Required	Yes, if the FS Sales are less than the Calendar YTD WIC Sales		
	DB Column	VendorSales.ProofFSSalesCd		
	Code ID	FS Eligible Sales Proof		

Control	Description		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the sales record are displayed.		
	Type	Text Box	
	Required	No	
	Length	NA	
	Validation	Mask of 'firstname lastname mm/dd/yyyy'	
	Display Only	Yes	Calculated
	DB Column	VendorSales.ModifyStfpID VendorSales.ModifyDt	

Business Rules
<ol style="list-style-type: none"> 1. If entered, the Begin Date must precede the End Date. Display error. 2. If an End Date is entered, a Begin Date must be entered. Display error. 3. If an End Date is entered, it must be the last day of the month. Display error. 4. If a Begin Date is entered, it must be the first day of the month. Display error. 5. The Begin Date cannot be in the future. Display error. 6. The End Date cannot be in the future. Display error. 7. If a Begin Date is entered, but no End Date is entered, the End Date will be automatically populated with the last day of the month of the Begin Date.. 8. Food Stamp Eligible Sales cannot be less than Food Stamp Sales. Display error. 9. The WIC Sales vs FS Sales percentage is calculated by dividing the WIC Sales amount by the user-entered food stamp sales. The WIC Sales amount is calculated by adding the WIC Sales for each month that is available in the VendorMonthlySales table during the timeframe indicated by the Begin Date and End Date. For example, if the WIC Sales batch job was last run on July 16, 2007 and the Begin Date entered was January 1, 2007 and the End Date entered was March 31, 2007, the following calculation would be performed: January Sales for displayed Vendor + February Sales for displayed Vendor + March Sales for displayed Vendor = WIC Sales amount 10. WIC Sales vs FS Eligible Sales percentage is calculated by dividing the WIC Sales amount by the user-entered food stamp eligible sales. The WIC Sales amount is calculated as described in the preceding Business Rule. 11. The Previous Calendar Month WIC Sales is populated from the VendorMonthlySales table. The most recent WIC Sales available prior to the Record Date is used. For example, if the WIC Sales batch job was last run on October 16, 2007 and the Record Date entered is August 19, 2007, the Previous Calendar Month WIC Sales would be the sales for July 2007.

Business Rules

12. The Calendar YTD WIC Sales is calculated by adding the WIC Sales available in the VendorMonthlySales table for each month, beginning in January of the Record Date year through the month of the Record Date.
For example, if the WIC Sales batch job was last run on June 16, 2007 and the Record Date entered is May 1, 2007 the following calculation would be performed:
January Sales for displayed Vendor +
February Sales for displayed Vendor +
March Sales for displayed Vendor +
April Sales for displayed Vendor = Calendar YTD WIC Sales
13. The Last Calendar YTD WIC Sales is calculated by adding the WIC Sales available in the VendorMonthlySales table for each month, beginning in January and ending in December of the year prior to the Record Date year.
For example, if the WIC Sales batch job was last run on June 16, 2007 and the Record Date entered is May 1, 2007 the following calculation would be performed:
January 2006 Sales for displayed Vendor +
February 2006 Sales for displayed Vendor +
March 2006 Sales for displayed Vendor +
<April 2006 through September 2006>
October 2006 Sales for displayed Vendor +
November 2006 Sales for displayed Vendor +
December 2006 Sales for displayed Vendor = Last Calendar YTD WIC Sales
14. If the FS Sales are less than the Calendar YTD WIC Sales then Proof of FS Eligible Sales is a required field. Display error.
15. If any of the WIC Sales amounts are not available for the period entered, a 0 is displayed. This could occur if a Sales record is added before the first WIC Sales batch job is run after the system is put into production, or the system has not been in production for at least a year and conversion data was not available.

Developer Notes

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1.5 Peer Group

The Peer Group screen is used to maintain peer group factors for the vendor, such as the peer group type, structure, geography, square footage and # of registers. The Vendor peer group system is a means of classifying authorized vendors into groups based on common characteristics or criteria that affect food prices for the purpose of applying appropriate competitive price criteria to vendors at authorization and limiting payments for food to competitive levels.

The recalculate peer group command button is available for use when the data necessary to calculate the Peer Group is provided. .

> Details > Peer Group

<Vendor Header (See VM overview) >

Record Date 06/15/2007  < 1 of 99 >  New  Edit  Delete

Peer Group Type WIC 50% Store

Structure Pharmacy

Geography

Square Footage

of Registers

Peer Group

Control	Description	
New	Clicking the New command button creates a new Peer Group record.	
	Type	Command Button
	Hot Key	Alt + N
Edit	Clicking the Edit command button enables all fields within the Peer Group screen for update.	
	Type	Command Button
	Hot Key	Alt + T
Delete	Clicking the Delete command button marks the record as deleted in the database upon user confirmation.	
	Type	Command Button
	Hot Key	Alt + D
Record Date	This is the record selector for the Vendor Peer Group records. It contains the recorded date. The drop-down and spin control allow selection of historical Vendor Peer Group records. When the New button is clicked, this date defaults to current date. It can be updated by the user.	
	Type	Record Selector (using Editable Date Picker)
	Contents	Formatted date of 'mm/dd/yyyy'
	DB Column	VendorPGFactors.RecordedDt

Control	Description			
Peer Group Type	Indicates the peer group type for the current vendor. Examples are grocery or special. May be used in Peer Group calculation.			
	Type	List Box		
	Required	No		
	DB Column	VendorPGFactors.PeerGroupStoreTypeCd		
	Code ID	Peer Group Store Type This code element is non-editable. The installed values are: Grocery Special Unknown		
Pharmacy	Checkbox indicating that the vendor has a pharmacy inside or the vendor itself is a pharmacy.			
	Type	Checkbox		
	DB Column	VendorPGFactors.PharmacyIn		
	Display Only	No	Calculated	No
WIC 50% Store	Checkbox indicating that the vendor considers its WIC sales to be equal to or greater than 50% of its total sales.			
	Type	Checkbox		
	DB Column	VendorPGFactors.50PercentIn		
	Display Only	No	Calculated	No
Structure	List box containing all available structures such as sole ownership, partnership, corporation. May be used in Peer Group calculation.			
	Type	List Box		
	Required	No		
	DB Column	VendorPGFactors.StructureCd		
	Code ID	Store Structure This code element is non-editable. The installed values are: Sole Proprietor Partnership Corporation Unknown		

Control	Description			
Geography	List box containing all geography types such as Rural or Urban. May be used in Peer Group calculation.			
	Type	List Box		
	Required	No		
	DB Column	VendorPGFactors.GeographicCd		
	Code ID	GeoIndicator This code element is non-editable. The installed values are: Remote Rural Rural Slightly Urban Urban Metro Market Edge Metro Market Center		
Square Footage	The total square footage of the vendor's physical location. This includes sales area and storage area for the location. May be used in Peer Group calculation.			
	Type	Text Box		
	Required	No		
	Length	Integer 9		
	Validation	Numeric, Mask of 9,999		
	Display Only	No	Calculated	No
	DB Column	VendorPGFactors.SqFootage		
# of Registers	The number of cash registers located at the WIC vendor. May be used in Peer Group calculation.			
	Type	Text Box		
	Required	No		
	Length	Integer 2		
	Validation	Numeric		
	Display Only	No	Calculated	No
	DB Column	VendorPGFactors.NumOfRegisters		

Control	Description			
Peer Group	Contains the peer group number.			
	Type	List Box		
	Required	Yes, if the Vendor Status is a status where the system sends the vendor information to the bank (which allows redemptions).		
	DB Column	VendorPGFactors.PG_ID		
	Code ID	PeerGroup		
Recalculate Peer Group	Clicking the Recalculate Peer Group command button forces a calculation of the Vendor's peer group. This command button is only available when the fields that are required to calculate the peer group are available or the weighting factor has a value of 0% for the field.			
	Type	Command Button		
	Hot Key	Alt + L		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the peer group factor 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	VendorPGFactors.ModifyStfpID VendorPGFactors.ModifyDt		

Business Rules
<ol style="list-style-type: none"> <li data-bbox="203 1331 1398 1493">1. The Recalculate Peer Group command button is disabled until the New or Edit command button is clicked, the user has security rights for this function, and the following fields contain valid data: Peer Group Type, Square Footage, # of Registers, Structure and Geography. For fields that contain a Weighting Factor Value of 0%, the fields are not required to contain data. <li data-bbox="203 1503 1398 1625">2. By the Vendor Status, the system determines whether vendor information is included in the banking interface file (which allows redemptions). An error will occur if a vendor has a status of this type (i.e. Active) and the peer group number is blanked out. <li data-bbox="203 1635 1398 1730">3. The Peer Group list box values come from the PeerGroup.Number except for the one that matches the value of the Vendor.WIC50%PeerGroupNumber parameter. It has the value of the Vendor.WIC50%Name parameter displayed for it.

Developer Notes

1. When vendor information is saved the peer group is calculated and returned. This is done on an insert only. Peer Group is assigned based on multiple factors from the Vendor screen and will not be populated until the Vendor screen is completed and saved. After all data is entered a peer group algorithm runs that looks at the following fields and the associated parameters to determine the vendor's peer group:

Criteria – Peer Group Type

Factors:

Square Footage

of Registers and Structure

Food Stamp Elig Sales

Geography

Each factor has a weight associated to it. The peer group that the vendor's value hit gets the associated weight. If no peer group is found, the associated weight is ignored. The vendor is assigned the peer group that has the largest portion of the associated weights. If there is a tie, no PG assigned (warning given).

Geography Indicator values (which is Peer Group Type of 'Grocery')

Food Stamp Elig Sales is 15%

Square Footage is 25%

of Registers and Structure is 30%

Geography is 30%

Example 1:

Vendor is a Peer Group Type of 'Grocery'

PG 1 gets Food Stamp Elig Sales

PG 2 gets Square Footage

PG 2 gets # of Registers and Structure

PG 3 gets Geography

PG 1 gets 15, PG 2 gets 55 and PG 3 gets 30 – Vendor assigned to PG 2

Example 2:

Vendor is a Peer Group Type of 'Grocery'

PG 1 gets Food Stamp Elig Sales

PG 1 gets Square Footage

No PG found for # of Registers and Structure

PG 3 gets Geography

PG 1 gets 40 and PG 3 gets 30 – Vendor assigned to PG 1

Developer Notes
<p>Example 3:</p> <p>Vendor is a Peer Group Type of 'Grocery'</p> <p>PG 1 gets Food Stamp Elig Sales</p> <p>PG 2 gets Square Footage</p> <p>PG 3 gets # of Registers and Structure</p> <p>PG 4 gets Geography</p> <p>2. PG 1 gets 15, PG 2 gets 25, PG 3 gets 30 and PG 4 gets 30 – No PG assigned; user warned</p>

1.6 Status/Summaries/Log

The Status/Summaries/Log branch node of the Vendor Management navigation tree allows the user to view vendor status, summary information about events and violations, and a vendor log. It also allows for appeals to be maintained.

1.6.1 Status

1.6.1.1 Status Details

The Status Details screen is used to add, edit, or delete vendor status records. Information found on this screen includes Vendor Status, Reason for Status Change, Termination Reasons and Disqualification End Date.

> *Details* > *Status/Summaries/Log* > *Status* > *Status Details*

<Vendor Header (See VM overview)>

The screenshot shows a web-based form for 'Status Details'. At the top, there is a 'Record Dates' section with a date dropdown set to '03/22/2007' and navigation icons. Below this is a toolbar with 'New', 'Edit', and 'Delete' buttons. The main form contains several fields: 'Vendor Status' (dropdown menu set to 'Closed'), 'Reason For Status Change' (dropdown menu set to 'Store Closed'), 'Appealed' (checkbox, currently unchecked), 'Termination Reasons' (checkbox list with 'Store Closed' checked and others unchecked), and 'Disqualification End Date' (dropdown menu).

Control	Description			
Record Dates	The Record Date is the date that the user created/edited the Status Record.			
	Type	Record Selector (using Date Picker)		
	Contents	Date of recording of status		
	DB Column	VendorStatus.RecordedDt		
New	Clicking the New command button creates a new vendor status record.			
	Type	Command Button		
	Hot Key	Alt + N		
Edit	Clicking the Edit command button puts the currently displayed status record into Edit mode.			
	Type	Command Button		
	Hot Key	Alt + T		
Delete	Clicking the Delete command button marks the record as deleted in the database upon user confirmation.			
	Type	Command Button		
	Hot Key	Alt + D		
Vendor Status	List box that contains all available vendor statuses.			
	Type	List Box		
	Required	Yes		
	DB Column	VendorStatus.VendorStatusCd		
	Code ID	VendorStatusCode table lookup		
Reason for Status Change	When a status change occurs for a vendor, a status change reason is required.			
	Type	List Box		
	Required	Yes, when there is a status change.		
	DB Column	VendorStatus.StatusChgReasonCd		
	Code ID	VendorStatusChangeCode table lookup		
Appealed	A checkbox indicating that a vendor appealed denial of authorization as a WIC vendor or their termination as a WIC vendor.			
	Type	Check Box		
	Display Only	No	Calculated	No
	DB Column	VendorStatus.AppealedIneligIn		

Control	Description			
Termination Reasons	A list box containing all reasons for termination or closing.			
	Type	List Box		
	Required	Yes, if "Closed" or "Terminated" is selected for Vendor Status		
	DB Column	VendorTermination.TermReasonCd		
	Code ID	Vendor Term Reason This code element is editable but these installed values are non-editable: Reauthorization Failed Closed		
<Disqualification End Date	This date represents the end of the disqualification period. Is not enabled unless 'Disqualified' was selected for 'Vendor Status.'			
	Type	Date Picker		
	Required	Yes, if 'Disqualified' was selected for 'Vendor Status.'		
	Display Only	No	Calculated	No
	DB Column	VendorStatus.DisqualificationEndDt		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the vendor status 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	VendorStatus.ModifyStfpID + VendorStatus.ModifyDt		

Business Rules
<ol style="list-style-type: none"> Vendor Status selection controls the values available in the Reason For Status Change. By the Vendor Status, the system determines whether vendor information is included in the banking interface file (which allows redemptions). An error occurs if a vendor status of this type (i.e. Active) is selected but no peer group has been set on the Store Info screen. A change of Vendor Status clears the Reason For Status Change. The Termination Reasons list box requires at least one selection but must allow for more than one reason to be selected (when Vendor Status equals Closed).

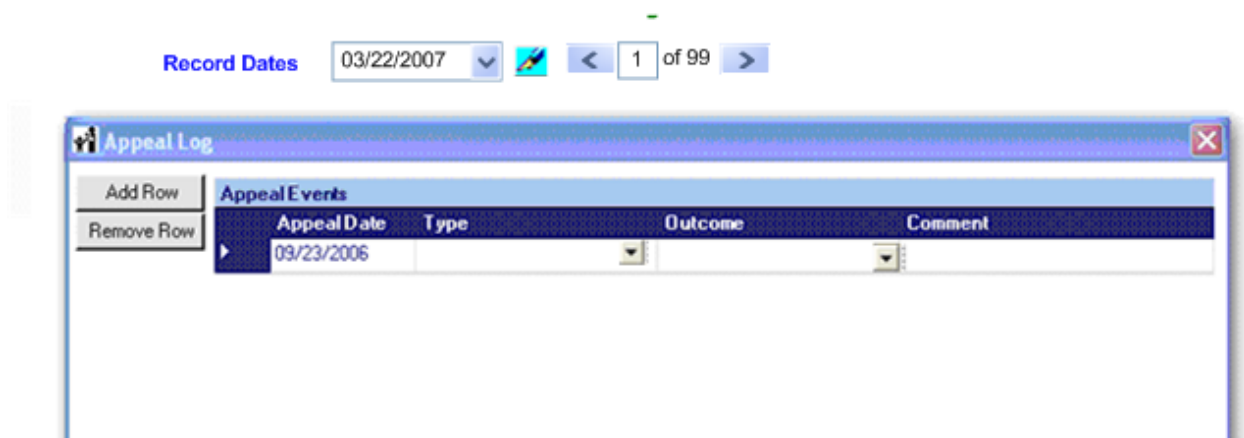
Developer Notes
1.

1.6.1.2 Appeal Log

The Appeal Log screen is used to record any appeal events that occur. This screen allows the user to record the appeal date, type, outcome, and any comments that they want to make about the appeal events. All appeals apply to the currently selected status record. This screen is not editable until a Reason for Status Change and Appealed checkbox have been selected on the Status screen.

> *Details* > *Status/Summaries/Log* > *Status* > *Appeal Log*

<Vendor Header (See VM overview)>



Control	Description	
Record Dates	This is the record selector for the Status records. It contains the recorded date. The drop-down and spin control allow selection of historical Status records.	
	Type	Record Selector (using Date Picker)
	Contents	Mask of mm/dd/yyyy
	DB Column	VendorStatus.RecordedDt
Appeal Events	The Appeal Events data grid is used to record any appeal events that occur.	
	Type	Data Grid
Add Row	Clicking the Add Row command button creates a new row in the data grid that allows the user to enter information about the appeal event.	
	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		
Appeal Date	The date of the appeal event. This defaults to current day.			
	Type	Date Picker		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	VendorInvestAppeal.AppealDt		
Type	List box that contains all available appeal types.			
	Type	List Box		
	Required	Yes		
	DB Column	VendorInvestAppeal.TypeCd		
	Code ID	Appeal Type This code element is editable but these installed values are non-editable: Administrative		
Outcome	List box that contains all available appeal outcomes (TIP values).			
	Type	List Box		
	Required	No		
	DB Column	VendorInvestAppeal.OutcomeCd		
	Code ID	Appeal Outcome This code element is non-editable with these installed values: Pending Upheld Overturned Modified Judicial		
Comment	A comment related to the appeal event.			
	Type	Text Box		
	Required	No		
	Length	40		
	Validation	NA		
	DB Column	VendorInvestAppeal.Comment		
	Display Only	No	Calculated	No

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

Business Rules
<ol style="list-style-type: none"> When the Add Row button is pressed, the Appeal Date is set to current date by default. Duplicate Appeal Dates are allowed. No unique identification is required.

Developer Notes
<ol style="list-style-type: none"> The appeals records are stored in the same table as those appeal records found in the Vendor Management Investigation screen.

1.6.2 Events Summary

The Events Summary window is used to display a summary of changes that occurred for this vendor. This data grid is read-only and summarizes all risk changes, status changes, and training changes for the vendor.

> Details > Status/Summaries/Log > Events Summary

<Vendor Header (See VM overview)>

Event Summary			
Date	Description	Type	User
08/28/2006	Status Changed to Active due to Store Opened.	Status Change	Michael Wilson
08/28/2006	Training record created for Initial Training training.	Training Change	Michael Wilson

Control	Description		
Event Summary	The read-only data grid displays a summary of events that occurred specific to the selected vendor.		
	Type	Read-only Data Grid	
	Display	Yes	

Control	Description			
Date	The date the vendor's record changed.			
	Format	Date	Calculated	No
	DB Column	See developer notes		
Description	The description of the event.			
	Format	Text	Calculated	No
	DB Column	See developer notes		
Type	The type of event that caused the entry to be added to the Event Summary.			
	Format	Text	Calculated	No
	DB Column	See developer notes		
User	The user responsible for the entry added to the Event Summary. The user may be a user or a batch process.			
	Format	User Name (first last)	Calculated	No
	DB Column	See developer notes		

Business Rules
<p>1. Events include risk changes, status changes and training changes. An entry in the events log is made by finding records for the selected vendor in the training, status, and risk tables.</p> <p>2. Entries from each table are written to the event log with literal strings of text that identify the different columns of the grid.</p> <p>3. Items found in < > are field names from the database table. The field name is substituted by the actual data at run time.</p> <p>When the record comes from the training table, the phrase "Training Change" is used for the Type, the Description is "Training record created for <TrainReasonCd >", the Date is <PlannedDt>, and the User is the name of the staff person that matches the <InsertStfpID>.</p> <p>When the record comes from the status table the phrase "Status Change" is used for the Type, the Description is "Changed to <VendorStatusCd>", the Date is <RecordedDt> and the User is the name of the staff person that matches the <InsertStfpID>.</p> <p>When the record comes from the risk table the phrase "Risk Change" is used for the Type, the Description is "Vendor Risk Created for <VendorRiskType.Name>", the Date is <EffectiveDt> and the User is the name of the staff person that matches the <InsertStfpID>.</p> <p>4. Records are sorted by Date, descending, and then Description.</p> <p>5. When updates are made to the active Vendor's Status, Training or Risks records, the Events Summary will display the events in the list (even it not yet saved by the user).</p>

Developer Notes
1. This is a union of several tables. The tables involved are VendorTraining, VendorStatus, and VendorRisk.

1.6.3 Violation Summary

> *Details* > *Status/Summaries/Log* > *Violation Summary*

<Vendor Header (See VM overview)>

The Violation Summary window is used to display a summary of all violations and sanction points for the selected vendor, a total number of the sanction points, as well as the option to specify specific sanction points to be totaled. The data comes from entries made on the Feedback, Investigations and Monitoring screens. By clicking View All, both active and inactive violations and sanction points for the selected vendor are displayed.

> *Details* > *Status/Summaries/Log* > *Violation Summary*

<Vendor Header (See VM overview)>

Active Sanction Points: 20

Highlight Rows to Calculate Sanction Points:

Violation Summary			
Date	Violation Type	Sanction Points	Origin
11/30/2006	Allowed To Buy Formula Not On Check	10	Investigations
10/24/2005	Cash/Credit On Return For Other Purchase	10	Monitoring
12/17/2004	Accepting 5 Checks Over 30 Days Old	5	Feedback

Control	Description			
Active Sanction Points	The total number of active sanction points for the vendor. Active sanction points are those with an end date in the future.			
	Type	Text Box		
	Required	No		
	Length	3		
	Validation	NA		
	Display Only	Yes	Calculated	Yes
	DB Column	NA		

Control	Description			
Highlight Rows to Calculate Total Sanction Points	The total number of sanction points based on the rows that the user selects.			
	Type	Text Box		
	Required	No		
	Length	3		
	Validation	NA		
	Display Only	Yes	Calculated	Yes
View All	When the View All command button is selected, all violations, both active and inactive, for the selected vendor are displayed.			
	Type	Command Button		
	Hot Key	Alt + V		
Violation Summary	The Violation Summary data grid shows the violations for the selected vendor based on the option selected.			
	Type	Read-only Data Grid		
	Display Only	Yes		
Date	The violation date from the origin screen (i.e. Feedback, Monitoring, or Investigations).			
	Format	Date	Calculated	No
	DB Column	See Business Rules		
Violation Type	The type of violation assigned to the vendor.			
	Format	Text	Calculated	No
	DB Column	See Business Rules		
Sanction	The sanction points assigned for the specific violation.			
	Format	Number	Calculated	No
	DB Column	See Business Rules		
Origin	The Origin displays where the recording of the violation occurred. Origin may be Investigations, Monitoring or Feedback.			
	Format	Text	Calculated	No

Business Rules
<ol style="list-style-type: none"> 1. The user can click a single row or click a row and drag (selecting multiple rows). As the user does this, Highlight Rows to Calculate Sanction Points is updated with the accumulated amount for this selection. If multiple rows are selected, the Highlight Rows to Calculate Sanction Points is updated when the user releases the mouse. 2. If 'View All' has not been selected, the grid is populated based on all active sanction points. 'Active sanction points' is calculated by totaling the active sanction points assigned to the vendor.

Business Rules

3. If 'View All' has been selected, the grid is populated based on all sanction points, both active and inactive. The 'Active sanction points' will still contain the total of all active sanction points.
4. An entry in the violation summary is made by finding records for the selected vendor in the monitoring, investigation, and feedback tables.
5. Items found in <> are field names from the database table. The field name will be substituted by the actual data at run time.
When the record comes from the monitoring table the Date is the <ViolationDt>, the Violation Type is <VendorViolationType>, the Points is <SanctionPoints>, the Origin is "Monitoring."
When the record comes from the investigation table the Date is the <ViolationDt>, the Violation Type is < VendorViolationType>, the Points is <SanctionPoints>, the Origin is "Investigations."
When the record comes from the feedback table the Date is <ViolationDt>, the type is ComplaintTypeCd, the Points is <SanctionPoints>, the Origin is "Feedback."
6. The records in the grid are sorted by Date, descending, followed by Violation Type, ascending, and then Origin, ascending.

Developer Notes

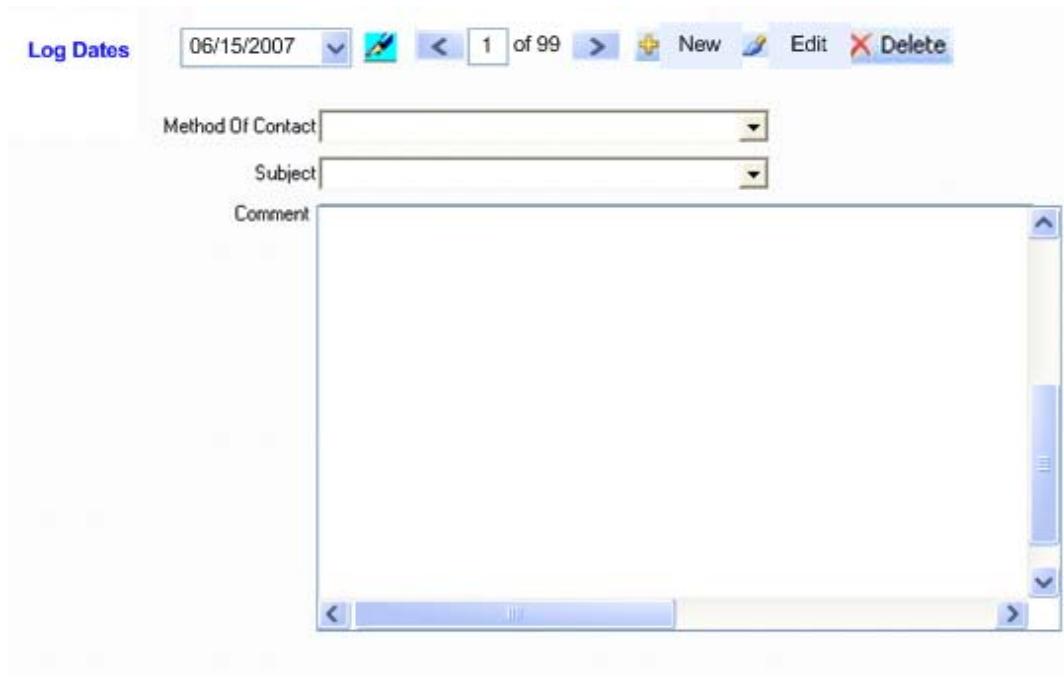
1. This is a union of several tables. The tables involved are: RoutineMonitoringViolation, VendorInvActViolation and VendorFeedbackViolation.

1.6.4 Vendor Log

The Vendor Log screen is used to record any contact made between a vendor coordinator and the vendor. The screen allows the user to record the date, method of contact, subject discussed, and a comment about the communication that occurred with the vendor.

> *Details* > *Status/Summaries/Log* > *Vendor Log*

<Vendor Header (See VM overview)>



Control	Description	
Log Dates	The date the user determines the communication occurred with this vendor.	
	Type	Record Selector (using Editable Date Picker)
	Contents	Date of existing Log records
	DB Column	VendorEventLog.EffectiveDt
New	Clicking the New command button creates a new vendor log record.	
	Type	Command Button
	Hot Key	Alt + N
Edit	Clicking the Edit command button puts the currently displayed record into Edit mode.	
	Type	Command Button
	Hot Key	Alt + T

Control	Description			
Delete	Clicking the Delete command button marks the record as deleted in the database upon user confirmation.			
	Type	Command Button		
	Hot Key	Alt + D		
Method of Contact	The form of communication used to contact the vendor.			
	Type	List Box		
	Required	Yes		
	DB Column	VendorEventLog.ContactMethodCd		
	Code ID	ContactMethod		
Subject	The subject discussed in the communication with the vendor.			
	Type	List Box		
	Required	Yes		
	DB Column	VendorEventLog.SubjectCd		
	Code ID	VendContSubject		
Comment	A comment related to the communication with the vendor.			
	Type	Multi Line Text Box		
	Required	Yes		
	Display Only	No	Calculated	No
	DB Column	VendorEventLog.Comment		
<Last Modified By User and Date>	In the lower right-hand corner, the user and the date of the last update of the vendor contact 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	VendorEventLog.ModifyStfpID + VendorEventLog.ModifyDt		

Business Rules
1. Duplicate Log Dates are allowed. No unique identification is required as user can scroll through entries.

Developer Notes
1.