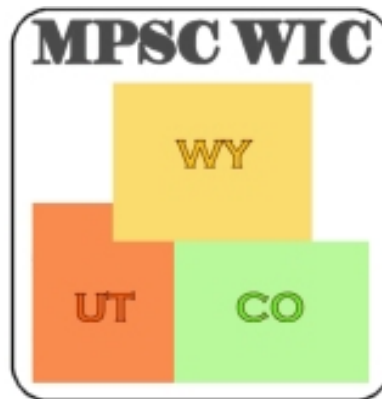


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# Mountain Plains States Consortium WIC System Project

## DETAILED FUNCTIONAL DESIGN DOCUMENT VM 7 VENDOR MANAGEMENT PRICE SURVEY SCREENS

*Presented to:*



Revision Date: January 7, 2011

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## Document Revisions

| Revision Date | Updated By | Requested By | Description of Revision |
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|               |            |              |                         |
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|               |            |              |                         |

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# 1 Price Surveys

The Price Survey area is used by vendor coordinators. For FI based states, the primary purpose of Price Surveys is to provide support to the state or local vendor coordinators in setting the container peer group prices. For EBT based states, the primary purpose is to collect vendor UPC prices for informational or high risk vendor analysis reasons. For EBT states, UPC pricing is controlled through an automated price resetting process using a standard deviation lift method based on UPC redemptions. This data is received from the WESS system as detailed in the EBT Host interface DFDD (UPC PG NTE section). There is no reason to apply the results of a survey to peer group pricing. In either case, the price survey functionality can also be used for initial vendor authorization.

For FI states, it is important to note that each state must decide whether its maximum pricing is going to be based on using a lift factor based on percentage or standard deviation. This decision affects the price surveying and peer group pricing views of the state's data. Percentage-based lifts involve multiplying the average price by a factor to achieve a maximum price. For example, an item with an average price of \$2.00, with a factor of 1.4 would yield a maximum price of \$2.80. Standard deviation-based lifts involve multiplying a standard deviation number by a factor and adding it to the average price to achieve maximum price. For example, an item with an average price of \$2.00, a standard deviation number (calculated from price surveying or entered directly) of \$0.44, with a factor of 2 would yield a maximum price of \$2.88.

For FI states, another important area to note is that each state must decide whether its price survey calculation is going to be based on asking vendors to give least expensive, most expensive or average prices during the survey. Consistency of approach is important because the averaging of these surveyed prices is used as a base for price setting.

For a state to switch lift factor methods or price survey calculation method entails a wholesale change in the numbers found in the system. Before this is attempted, a full analysis of all the updates should be done.

The basic steps in price surveys include:

- Setup up survey lists
- Setup and print a survey
- Record survey feedback from vendor
- Process survey to see the results
- Apply the results to the food pricing structure

The first area within Price Surveys is the Survey List screen which is where a survey list is defined. Survey lists contain foods to include in a survey and consist of detail product entries (FI) or UPC entries (both FI and EBT). The detail product/UPC definition and the vendor peer group pricing screens are found in the Food Management area of the system. Once a survey list has been created, it is available for inclusion in a survey in the Setup Survey screen. A survey list can be re-used and users can edit or delete survey lists.

The second area within Price Surveys is the Setup Survey screen which is where a survey is defined. In the Setup Survey screen, users select a survey list containing the foods to include in the survey. This screen is also used to identify which vendors have been sent a price survey. The data contained on this screen are the survey date on which vendors were sent the survey, the total number of vendors participating, the number of surveys that have been returned, and the number of surveys that have been completed. The vendors are identified by vendor name, vendor ID, local agency, and peer group. The ability to print the surveys is also found on this screen. Users can print a survey for all the vendors to which they have access, a single vendor, or a blank survey (no vendor information).

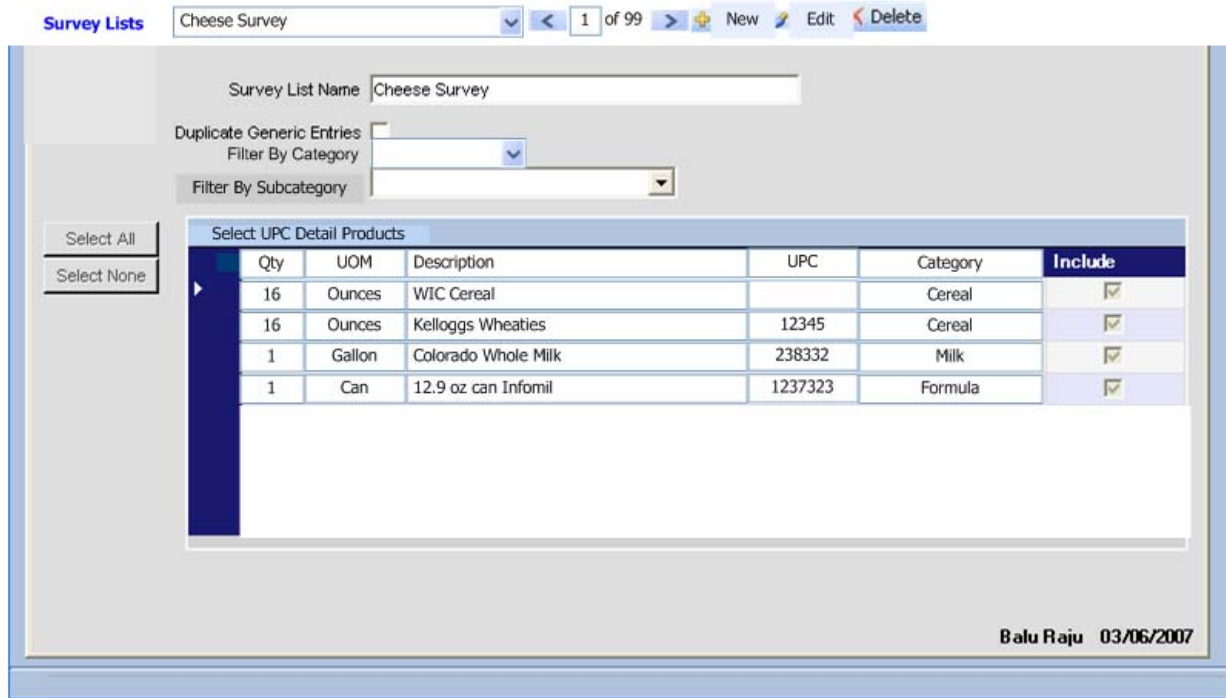
The third area within Price Surveys is Process Surveys which is where surveys are recorded, processed (or aggregated), and applied to the food container (FI) or subcategory (EBT) prices. The Process Survey area consists of two screens: Record Survey and Survey Result. The Record Survey screen is used to review the general status of the survey, as well as to initiate the recording of returned surveys. The vendor name link opens the Record Vendor Survey pop-up window which is used to record a vendor's specific food prices from the survey. Prices entered here are the prices returned to the vendor coordinator from the specific vendor. The Survey Result screen has two primary purposes. First, it is used to display the resultant survey's average and maximum prices for the container (FI) or subcategory (EBT) and associated peer groups that participated in the survey. The maximum price is calculated by multiplying the factor (setup in the Food Management screens) by the survey prices. Second, for FI-based states, the Survey Result screen is used to apply the resultant survey's average and maximum prices to the container and its peer groups. Total control is given over which records have the prices applied.

## 1.1 Survey List

A survey list contains the foods to be included in a survey. This is a setup function that must be completed so that survey lists are available when a survey is set up. A survey list can be re-used.

Survey lists can be created, edited, or deleted. Survey food lists consist of survey products and are used to determine vendor pricing. Once a survey food list has been added, it is then available for selection in the Setup Survey screen. The record selector is used to find an existing survey food list, and the name field is used to name a new survey food list.

> Price Surveys > Survey List



| Control      | Description   |                                 |
|--------------|---|---------------------------------|
| Survey Lists | This is the record selector for the Survey List records. It contains the active survey lists. The drop-down and spin control allow selection of available survey lists records. |                                 |
|              | <b>Type</b>   | Record Selector                 |
|              | <b>Contents</b>   | Name of all active survey lists |
| New          | The New command button is used to create a survey food list.  |                                 |
|              | <b>Type</b>   | Command Button                  |
|              | <b>Hot Key</b>  | Alt + N                         |
| Edit         | The Edit command button is used to update a survey food list.   |                                 |
|              | <b>Type</b>   | Command Button                  |
|              | <b>Hot Key</b>  | Alt + T                         |
| Delete       | The Delete command button is used to delete the displayed survey food list data from the database.  |                                 |
|              | <b>Type</b>   | Command Button                  |
|              | <b>Hot Key</b>  | Alt + D                         |

| Control                                      | Description   |                               |                   |    |  |
|--|---|-------------------------------|-------------------|----|--|
| Survey List Name                             | The name of the survey food list.   |                               |                   |    |  |
|  | <b>Type</b>   | Text Box                      |                   |    |  |
|  | <b>Required</b>   | Yes                           |                   |    |  |
|  | <b>Length</b>   | 50                            |                   |    |  |
|  | <b>Validation</b>   | NA                            |                   |    |  |
|  | <b>Display Only</b>   | No                            | <b>Calculated</b> | No |  |
|  | <b>DB Column</b>  | SurveyList.Name               |                   |    |  |
| Duplicate Generic Entries<br>(For FI States) | This checkbox is used to indicate whether this survey list contains any duplicate generic entries for purposes of gathering more than one entry for a generic description/size (i.e. WIC approved cheese). This causes the printed survey to contain instructions to the vendor on how to handle these duplicate entries when filling out the survey. |                               |                   |    |  |
|  | <b>Type</b>   | Checkbox                      |                   |    |  |
|  | <b>Required</b>   | No                            |                   |    |  |
|  | <b>DB Column</b>  | SurveyList.HasMultiplesIn     |                   |    |  |
| Filter By Category                           | The food category of active foods available in the system. This controls the contents found in the Select UPC Detail Products grid.   |                               |                   |    |  |
|  | <b>Type</b>   | List Box                      |                   |    |  |
|  | <b>Required</b>   | No                            |                   |    |  |
|  | <b>DB Column</b>  | None                          |                   |    |  |
|  | <b>Code ID</b>  | Food Category table lookup    |                   |    |  |
| Filter By Subcategory                        | The food subcategory of active foods available in the system. This controls the contents found in the Select UPC Detail Products grid.  |                               |                   |    |  |
|  | <b>Type</b>   | List Box                      |                   |    |  |
|  | <b>Required</b>   | No                            |                   |    |  |
|  | <b>DB Column</b>  | None                          |                   |    |  |
|  | <b>Code ID</b>  | Food Subcategory table lookup |                   |    |  |
| Select All                                   | The Select All command button selects (checks) the Include checkbox for all displayed survey products.  |                               |                   |    |  |
|  | <b>Type</b>   | Command Button                |                   |    |  |
|  | <b>Hot Key</b>  | Alt + L                       |                   |    |  |

| Control                    | Description   |   |                   |    |
|----------------------------|---|---|-------------------|----|
| Select None                | The Select None command button deselects (unchecks) the Include checkbox for all displayed survey products. |   |                   |    |
|                            | <b>Type</b>   | Command Button                          |                   |    |
|                            | <b>Hot Key</b>  | Alt + O                                 |                   |    |
| Select UPC Detail Products | This grid shows the UPC detail products that are active and/or included in this survey list.                |   |                   |    |
|                            | <b>Type</b>   | Editable Data Grid                      |                   |    |
| Qty<br>(For FI States)     | The quantity (or units), in relation to the size, of the surveyed product.                                  |   |                   |    |
|                            | <b>Type</b>   | Text Box                                |                   |    |
|                            | <b>Required</b>   | NA                                      |                   |    |
|                            | <b>Length</b>   | Decimal 9.5                             |                   |    |
|                            | <b>Validation</b>   | NA, Mask of Z9.9Z, Initial display of 5 |                   |    |
|                            | <b>Display Only</b>   | Yes                                     | <b>Calculated</b> | No |
|                            | <b>DB Column</b>  | DetailProduct.Quantity                  |                   |    |
| UOM<br>(For FI States)     | The unit of measure of the surveyed product.  |   |                   |    |
|                            | <b>Type</b>   | Text Box                                |                   |    |
|                            | <b>Required</b>   | NA                                      |                   |    |
|                            | <b>Length</b>   | NA, Initial display of 11               |                   |    |
|                            | <b>Validation</b>   | NA                                      |                   |    |
|                            | <b>Display Only</b>   | Yes                                     | <b>Calculated</b> | No |
|                            | <b>DB Column</b>  | ProdContainer.ContainerSizeCd           |                   |    |
| Description                | The detail product description of the surveyed product.   |   |                   |    |
|                            | <b>Type</b>   | Text Box                                |                   |    |
|                            | <b>Required</b>   | NA                                      |                   |    |
|                            | <b>Length</b>   | NA, Initial display of 20               |                   |    |
|                            | <b>Display Only</b>   | Yes                                     | <b>Calculated</b> | No |
|                            | <b>DB Column</b>  | DetailProduct.Description               |                   |    |

| Control                          | Description  |   |            |    |
|----------------------------------|--|---|------------|----|
| UPC                              | The detail product UPC of the surveyed product.  |   |            |    |
|                                  | Type   | Text Box                                      |            |    |
|                                  | Required   | NA  |            |    |
|                                  | Length   | NA  |            |    |
|                                  | Validation   | NA  |            |    |
|                                  | Display Only   | Yes   | Calculated | No |
|                                  | DB Column  | DetailProduct.UPC                             |            |    |
| Category                         | The category of UPC detail product item.   |   |            |    |
|                                  | Type   | Text Box                                      |            |    |
|                                  | Required   | NA  |            |    |
|                                  | Length   | NA, Initial display of 20                     |            |    |
|                                  | Validation   | NA  |            |    |
|                                  | Display Only   | Yes   | Calculated | No |
|                                  | DB Column  | FoodCategory.Name                             |            |    |
| Include                          | The Include checkbox is used to include the UPC detail product in the survey list.   |   |            |    |
|                                  | Type   | Checkbox                                      |            |    |
|                                  | DB Column  | SurveyListDetail.ID                           |            |    |
| <Last Modified By User and Date> | In the lower right-hand corner, the user and the date of the last update of the survey list or UPC detail product records are displayed. |   |            |    |
|                                  | Type   | Text Box                                      |            |    |
|                                  | Required   | No  |            |    |
|                                  | Length   | NA  |            |    |
|                                  | Validation   | Mask of 'firstname lastname mm/dd/yyyy'       |            |    |
|                                  | Display Only   | Yes   | Calculated | No |
|                                  | DB Column  | SurveyList.ModifyStfpID + SurveyList.ModifyDt |            |    |

| Business Rules  |
|---|
| <ol style="list-style-type: none"> <li>1. When the System.FoodBenefitDeliveryMethod system parameter is set to "EBT", the Duplicate Generic Entries, Quantity and UOM columns are not shown.</li> <li>2. The format of the Filter By Category and the Category (in the grid) is 99 xxxxxx (i.e. "01 Milk") and the Filter By Subcategory is 999 xxxxxx (i.e. "001 Whole Fluid Milk")</li> <li>3. The Edit and Delete buttons must be disabled if a survey list is found to be in any survey.</li> </ol> |

| Business Rules   |
|--|
| <p>4. A survey list can only be saved if it has at least one UPC Detail Product selected (checked).</p> <p>5. Sort the list by category and then the description in ascending order.</p> <p>6. When creating a list, the UPC detail product list should only contain active 'food'. UPC Detail Products, using their effective date and end date, are valid in context to the time that the survey list is created. UPC Detail Products with all or a portion of the Effective Date range in the future can be selected. UPC Detail Products with an End Date in the past are not displayed.</p> |

| Developer Notes |
|-----------------|
| <p>1.</p>       |

## 1.2 Setup Survey

The Setup Survey screen is used to identify which vendors have been sent a price survey. The vendors, within the grid, are identified by vendor name, vendor ID, local agency, and peer group.

> Price Surveys > Setup Survey

**Surveys** Egg Cheese Survey Nov 2006 1 of 99 New Edit Delete

Survey Name: Egg Cheese Survey Nov 2006  
 Due Date: 12/16/2006  
 Survey List: Egg and Cheese Survey  
 Return to Local Agency:   
 Survey Price Type: Most Expensive

Total Vendors: 2 Filter By Peer Group: Filter By Agency:

| Vendors Included In Survey |           |                        |      |         |               |                          |                          |
|----------------------------|-----------|------------------------|------|---------|---------------|--------------------------|--------------------------|
| LA ID                      | Vendor ID | Name                   | PG # | PG Type | WIC 50% Store | Include                  | Print                    |
| 31                         | 77011     | Hyvee Food Store #1142 | 6    |         | No            | <input type="checkbox"/> | <input type="checkbox"/> |
| 31                         | 77012     | Hyvee Food Store #1148 | 6    |         | No            | <input type="checkbox"/> | <input type="checkbox"/> |
| 31                         | 77013     | Hyvee Food Store #1151 | 6    |         | No            | <input type="checkbox"/> | <input type="checkbox"/> |
| 31                         | 77014     | Hyvee Food Store #1318 | 6    |         | No            | <input type="checkbox"/> | <input type="checkbox"/> |
| 31                         | 77015     | Hyvee Food Store #1887 | 6    |         | No            | <input type="checkbox"/> | <input type="checkbox"/> |
| 31                         | 77017     | Hyvee Food Store #1759 | 6    |         | No            | <input type="checkbox"/> | <input type="checkbox"/> |
| 31                         | 77019     | Linn's Supermarket     | 4    |         | No            | <input type="checkbox"/> | <input type="checkbox"/> |
| 31                         | 77037     | Hyvee Food Store #1011 | 6    |         | No            | <input type="checkbox"/> | <input type="checkbox"/> |

Baluraju 11/17/2006

| Control     | Description   |                   |                   |    |
|-------------|---|-------------------|-------------------|----|
| Surveys     | This is the record selector for the Survey records. The drop-down and spin control allow selection of survey records.   |                   |                   |    |
|             | <b>Type</b>   | Record Selector   |                   |    |
|             | <b>Contents</b>   | Survey Names      |                   |    |
|             | <b>Control Name</b>   | PriceSurvey.Name  |                   |    |
| New         | The New command button is used to record new price survey data. All fields are cleared and enabled for update.  |                   |                   |    |
|             | <b>Type</b>   | Command Button    |                   |    |
|             | <b>Hot Key</b>  | Alt + N           |                   |    |
| Edit        | The Edit command button is used to edit a survey.   |                   |                   |    |
|             | <b>Type</b>   | Command Button    |                   |    |
|             | <b>Hot Key</b>  | Alt + T           |                   |    |
| Delete      | The Delete command button is used to delete the displayed price survey data from the database.  |                   |                   |    |
|             | <b>Type</b>   | Command Button    |                   |    |
|             | <b>Hot Key</b>  | Alt + D           |                   |    |
| Survey Name | The name of the survey. It is recommended that the user describe the survey in terms of the time period (i.e. Oct 2006), the survey list (i.e. use some or all of the Survey List Name), and breadth (statewide, certain agencies, etc.). |                   |                   |    |
|             | <b>Type</b>   | Text Box          |                   |    |
|             | <b>Required</b>   | Yes               |                   |    |
|             | <b>Length</b>   | 50                |                   |    |
|             | <b>Validation</b>   | NA                |                   |    |
|             | <b>Display Only</b>   | No                | <b>Calculated</b> | No |
|             | <b>DB Column</b>  | PriceSurvey.Name  |                   |    |
| Due Date    | The date the price survey is due to be returned.  |                   |                   |    |
|             | <b>Type</b>   | Date Picker       |                   |    |
|             | <b>Required</b>   | Yes               |                   |    |
|             | <b>Display Only</b>   | No                | <b>Calculated</b> | No |
|             | <b>DB Column</b>  | PriceSurvey.DueDt |                   |    |

| Control                | Description  |  |                   |     |
|------------------------|--|--|-------------------|-----|
| Survey List            | A list box containing all food surveys that are available. Food surveys must be set up prior to being displayed in this list box.  |  |                   |     |
|                        | <b>Type</b>  | List Box   |                   |     |
|                        | <b>Required</b>  | Yes  |                   |     |
|                        | <b>DB Column</b>   | SurveyList.Name  |                   |     |
|                        | <b>Code ID</b>   | Survey List table lookup   |                   |     |
| Return To Local Agency | A checkbox used to indicate whether this survey, when printed, should use local agency information (from the user's login) for the return address. If unchecked, then the state information will be used for the return address. |  |                   |     |
|                        | <b>Type</b>  | Checkbox   |                   |     |
|                        | <b>DB Column</b>   | Not stored   |                   |     |
| Survey Price Type      | Indicates the type of prices requested on the survey.  |  |                   |     |
|                        | <b>Type</b>  | List Box   |                   |     |
|                        | <b>Required</b>  | Yes, unless EBT state  |                   |     |
|                        | <b>DB Column</b>   | PriceSurvey.TypeCd   |                   |     |
|                        | <b>Code ID</b>   | Survey Price Type<br>This code element is non-editable.<br>The installed values are:<br>Average<br>Least Expensive<br>Most Expensive |                   |     |
| Total Vendors          | A text box used to display the total number of vendors that are selected to participate in the price survey.   |  |                   |     |
|                        | <b>Type</b>  | Text Box   |                   |     |
|                        | <b>Required</b>  | NA   |                   |     |
|                        | <b>Length</b>  | 3, Mask of Z9  |                   |     |
|                        | <b>Validation</b>  | NA   |                   |     |
|                        | <b>Display Only</b>  | Yes  | <b>Calculated</b> | Yes |
|                        | <b>DB Column</b>   | NA   |                   |     |

| Control              | Description   |  |
|----------------------|---|--|
| Filter By Peer Group | List box containing active peer groups that can be selected for filtering of vendors. List values are all peer groups (including Statewide). A "blank" vendor (which designates all peer groups selected) should be set as default.     |  |
|                      | <b>Type</b>   | List Box   |
|                      | <b>Required</b>   | No   |
|                      | <b>DB Column</b>  | PeerGroup.PeerGroupNumber  |
|                      | <b>Code ID</b>  | PeerGroup table lookup   |
| Filter By Agency     | List box containing local agencies that can be selected for filtering of vendors. List values are all active agencies to which the user has access. A "blank" vendor (which designates all agencies selected) should be set as default. |  |
|                      | <b>Type</b>   | List Box   |
|                      | <b>Required</b>   | No   |
|                      | <b>DB Column</b>  | LocalAgency<br>Display as local agency number (FFLocalAgencyID) with a hyphen and then local agency name (OrganizationalNm). |
|                      | <b>Code ID</b>  | LocalAgency table lookup   |
| Select All           | The Select All command button is used to select all displayed vendors to be included in the price survey.   |  |
|                      | <b>Type</b>   | Command Button   |
|                      | <b>Hot Key</b>  | Alt + L  |
| Select None          | The Select None command button is used to deselect all displayed vendors from the price survey.   |  |
|                      | <b>Type</b>   | Command Button   |
|                      | <b>Hot Key</b>  | Alt + O  |
| Print All            | The Print All command button is used to print a formatted survey for every vendor whose Print checkbox is checked.  |  |
|                      | <b>Type</b>   | Command Button   |
|                      | <b>Hot Key</b>  | Alt + I  |
| Print Single         | The Print Single command button is used to print a formatted survey for the selected vendor.  |  |
|                      | <b>Type</b>   | Command Button   |
|                      | <b>Hot Key</b>  | Alt + P  |

| Control                    | Description   |                           |                   |    |
|----------------------------|---|---------------------------|-------------------|----|
| Print Blank                | The Print Blank command button is used to print a blank survey (no vendor cover letter).          |                           |                   |    |
|                            | <b>Type</b>   | Command Button            |                   |    |
|                            | <b>Hot Key</b>  | Alt + B                   |                   |    |
| Vendors Included in Survey | A data grid used to display and select which vendors will participant in the price survey.        |                           |                   |    |
|                            | <b>Type</b>   | Data Grid                 |                   |    |
| LA ID                      | The local agency serviced by the vendor that is displayed for selection in the food price survey. |                           |                   |    |
|                            | <b>Type</b>   | Text Box                  |                   |    |
|                            | <b>Required</b>   | NA                        |                   |    |
|                            | <b>Length</b>   | NA                        |                   |    |
|                            | <b>Validation</b>   | NA                        |                   |    |
|                            | <b>Display Only</b>   | Yes                       | <b>Calculated</b> | No |
|                            | <b>DB Column</b>  | Vendor.LA_ID              |                   |    |
| Vendor ID                  | The vendor ID of the vendor that is displayed for selection in the food price survey.             |                           |                   |    |
|                            | <b>Type</b>   | Text Box                  |                   |    |
|                            | <b>Required</b>   | NA                        |                   |    |
|                            | <b>Length</b>   | 5                         |                   |    |
|                            | <b>Validation</b>   | NA                        |                   |    |
|                            | <b>Display Only</b>   | Yes                       | <b>Calculated</b> | No |
|                            | <b>DB Column</b>  | Vendor.FFVendorID         |                   |    |
| Name                       | The name of the vendor that is displayed for selection in the food price survey.                  |                           |                   |    |
|                            | <b>Type</b>   | Text Box                  |                   |    |
|                            | <b>Required</b>   | NA                        |                   |    |
|                            | <b>Length</b>   | NA, Initial Display of 30 |                   |    |
|                            | <b>Validation</b>   | NA                        |                   |    |
|                            | <b>Display Only</b>   | Yes                       | <b>Calculated</b> | No |
|                            | <b>DB Column</b>  | Vendor.StoreName          |                   |    |

| Control       | Description  |                               |                   |    |
|---------------|--|-------------------------------|-------------------|----|
| PG #          | The peer group number of the vendor.   |                               |                   |    |
|               | <b>Type</b>  | NA                            |                   |    |
|               | <b>Required</b>  | Yes                           |                   |    |
|               | <b>Length</b>  | 2, Mask of Z9                 |                   |    |
|               | <b>Validation</b>  | NA                            |                   |    |
|               | <b>Display Only</b>  | Yes                           | <b>Calculated</b> | No |
|               | <b>DB Column</b>   | VendorPGFactors.PG_ID         |                   |    |
| PG Type       | The peer group type of the vendor that is displayed for selection.                             |                               |                   |    |
|               | <b>Type</b>  | Text Box                      |                   |    |
|               | <b>Required</b>  | NA                            |                   |    |
|               | <b>Length</b>  | NA, Initial Display of 10     |                   |    |
|               | <b>Validation</b>  | NA                            |                   |    |
|               | <b>Display Only</b>  | Yes                           | <b>Calculated</b> | No |
|               | <b>DB Column</b>   | VendorPGFactors.PGStoreTypeCd |                   |    |
| WIC 50% Store | Indicates whether the vendor that is displayed for selection is a WIC 50% Store or not.        |                               |                   |    |
|               | <b>Type</b>  | Text Box                      |                   |    |
|               | <b>Required</b>  | NA                            |                   |    |
|               | <b>Length</b>  | NA                            |                   |    |
|               | <b>Validation</b>  | NA                            |                   |    |
|               | <b>Display Only</b>  | Yes                           | <b>Calculated</b> | No |
|               | <b>DB Column</b>   | VendorPGFactors.50PercentIn   |                   |    |
| Include       | A checkbox used to indicate that the vendor has been included in the price survey.             |                               |                   |    |
|               | <b>Type</b>  | Checkbox                      |                   |    |
|               | <b>DB Column</b>   | NA                            |                   |    |
| Print         | A checkbox used to indicate whether this survey should be printed during any print operations. |                               |                   |    |
|               | <b>Type</b>  | Checkbox                      |                   |    |
|               | <b>DB Column</b>   | NA                            |                   |    |

| 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 survey or vendor included in survey records are displayed. |   |                   |    |
|                                  | <b>Type</b>  | Text Box  |                   |    |
|                                  | <b>Required</b>  | No  |                   |    |
|                                  | <b>Length</b>  | NA  |                   |    |
|                                  | <b>Validation</b>  | Mask of 'firstname lastname mm/dd/yyyy'         |                   |    |
|                                  | <b>Display Only</b>  | Yes   | <b>Calculated</b> | No |
|                                  | <b>DB Column</b>   | PriceSurvey.ModifyStfpID + PriceSurvey.ModifyDt |                   |    |

| Business Rules   |
|--|
| <ol style="list-style-type: none"> <li>1. The Surveys record selector should be sorted by the due date of the records (most recent to oldest).</li> <li>2. For EBT states (system parameter System.FoodBenefitDeliveryMethod set to "EBT"), do not display the field entitled Survey Price Type.</li> <li>3. Display an error if the selected survey list does not contain active 'food'. Active means that the detail product's effective dates and end date are valid in relationship to the current date.</li> <li>4. In any case, the list of vendors displayed should only be active vendors that are assigned to any active local agencies to which the user has access. Filtering criteria may modify this list. Active includes vendors with a status of Active or Pending Application. Vendors of a status Pending Application can get surveys for authorization purposes.</li> <li>5. Total vendors are calculated by counting the vendors with Include checkbox checked.</li> <li>6. The Edit and Delete buttons should be disabled whenever a survey has any recording activity.</li> <li>7. If a previous survey is displayed, display the vendors that were selected previously with their checkboxes checked.</li> <li>8. Error unless at least one vendor must be selected (checked).</li> <li>9. Print checkbox should be initially set according to the attribute that is set on the vendor's Details - Operations screen.</li> <li>10. Print All command button should only be enabled when at least one vendor has a Include and Print checkbox checked.</li> <li>11. Print Single and Print Blank command buttons are available all the time (whether in display or edit mode). The Print Single command button will print the selected vendor in the grid (Print checkbox does not have to be checked). If the Included checkbox is not checked this is an error.</li> <li>12. Default sorting of grid rows are by Agency (ascending) and Vendor ID (Ascending). Grid must be able to be re-sorted by the Name grid column.</li> </ol> |

**Business Rules**

13. The WIC 50% peer group is determined based on the Config Parm "Vendor.WIC50%PeerGroupNbr". For vendors with this peer group number, the contents of the Config Parm "Vendor.WIC50%Name" should be displayed.
14. If the screen has changed data, the system will automatically save if the Print Blank, Print Single and Print All is pressed. The print function requires saved data.

**Developer Notes**

- 1.

**1.2.1 Printed Survey (Dynamic)**

A printed survey includes the letter to the vendor and the survey itself.

**1.2.1.1 Language: English**

The printed survey output is in English.

**1.2.1.2 Printed Survey Mockup**

Examples of the printed survey letter and survey itself appear below.

**Vendor Mailing Address**

Dear **Vendor Contact**,

The following pages contain a WIC food price survey. We would like to thank you in advance for your participation in this survey. Please have the survey completed and returned by **Due Date**. The return address for the survey is:

**Return Name**

**Return Address**

For specific items (i.e. UPC), list the specific price. For other non-specific items, list prices for the **Survey Price Calc Type** WIC item. For those items, please fill out the comment column with any additional information (for instance, the brand name is none was specified). If an item is not carried at your store, record "NA" for "Not Available".

If multiple entries of the same non-specific item exists, please record the next **Survey Price Calc Type** expensive price.

If you have any questions, please call **Return Phone Number**.

Sincerely,

**Return Name**

**Survey Name**

**<Due Date>**

| <u>Qty</u> | <u>UOM</u> | <u>Product</u>         | <u>UPC</u> | <u>Category</u> | <u>Price</u> | <u>Comments</u> |
|------------|------------|------------------------|------------|-----------------|--------------|-----------------|
| 16         | Ounces     | Kelloggs Wheaties      | 12345      | Cereal          | \$           |                 |
| 16         | Ounces     | WIC Cereal             |            | Cereal          | \$           |                 |
| 1          | Can        | 12.9 oz can<br>Infomil | 1237323    | Formula         | \$           |                 |
| 1          | Gallon     | Colorado Whole<br>Milk | 238332     | Milk            | \$           |                 |

I certify that the prices on this survey are true and correct.

|               |                     |                |
|---------------|---------------------|----------------|
| _____         | _____               | _____          |
| Name of Store | Signature of Vendor | Date Completed |

Print Date

Page n or nn

| Business Rules   |
|--|
| <ol style="list-style-type: none"> <li>1. The Vendor Mailing Address can be positioned for the window in a windowed envelope. Since the template is dynamic, the user will be able to move this data to accommodate any windowed envelope.</li> <li>2. The list of vendors printed should only be selected vendors that are assigned to any active local agencies to which the user has access.</li> <li>3. If the user checked the Return to Local Agency checkbox, use the values from the local agency which the user is logged in. For users who have responsibility for multiple agencies, be sure that they log into the local agency with the desired agency. If the user did not check the Return to Local Agency checkbox, use the Vendor Manager system parameters, for the Return Name, Return Address, and Return Phone Number.</li> <li>4. The sort order of the Product Category is Ascending.</li> <li>5. The sort order of a Description within a Product Category is Ascending.</li> <li>6. When Survey Price Type is 'Average', place blanks in the <b>Survey Price Calc Type</b>. This allows a user to no use this data field by moving it off to the side in the template.</li> <li>7. When the System.FoodBenefitDeliveryMethod system parameter is EBT, the columns of Qty and UOM are deleted.</li> <li>8. The Printed Survey consists of two templates. The cover page is considered</li> </ol> |

**Business Rules**

'Dynamic' and is available for user change in the System Admin area. Page Numbers are not necessary on this cover page. The second (and subsequent) page is a 'Static' template because it is a table of data and is not available for user change in the System Admin area.

## 9. Data Mapping

- a. Vendor Mailing Address – Use the Vendor's mailing address, if not found use the physical address
- b. Vendor Contact – First name and last name from VendorContact table where the contact type is the primary contact of the physical address.
- c. Due Date – PriceSurvey.DueDt
- d. If LA checkbox checked
  - i. Return Name - LocalAgency.RetailCoordinator
  - ii. Return Address – Local Agency table Address columns
  - iii. Return Phone Number – Local Agency.BusinessPhoneNr + LocalAgency.BusinessExt
- e. Survey Price Calc Type – PriceSurvey.TypeCode

**Developer Notes**

### 1.3 Process Survey

The Process Survey area has the Record Survey screen and Survey Results screens. The Record Survey screen allows the user to record survey data and then process the data by calculating average prices. The Survey Results screen allows the user to review the calculated results and apply these results to the food pricing.

### 1.3.1 Record Survey

The record survey screen is used to review the general status of the survey, as well as to initiate the recording of vendors' returned surveys. The link of the vendor name creates a pop-up to allow the recording of the survey for that vendor.

> Price Surveys > Process Survey > Record Survey

Surveys

< 1 of 99 >

Due Date: 12/16/2006  
Survey List: Egg and Cheese Survey  
Survey Price Type: Most Expensive

Filter By Chain 
Filter By Owner

Total Vendors: 3      Surveys Received: 2      Surveys Entered: 2

| Vendors included in Survey |           |                                      |     |           |          |
|----------------------------|-----------|--------------------------------------|-----|-----------|----------|
| LA ID                      | Vendor ID | Name                                 | PG# | Received? | Entered? |
| 33                         | 14123     | <a href="#">Medicap Pharmacy</a>     | 8   | Yes       | Yes      |
| 33                         | 23135     | <a href="#">Clark's Super Market</a> | 3   | Yes       | Yes      |
| 22                         | 16163     | <a href="#">Phil's Groceries</a>     | 2   | No        | No       |

| Control                  | Description  |
|--------------------------|--|
| Surveys                  | This is the record selector for the Survey records. The drop-down and spin control allow selection of survey records.  |
|                          | <b>Type</b> Record Selector  |
|                          | <b>Contents</b> Survey Names   |
|                          | <b>DB Column</b> PriceSurvey.Name  |
| Calculate Average Prices | The Calculate Average Prices command button is used to tell the system to process the survey creating a Survey Results instance. This instance is named by concatenating the Survey Name to the date and time of when the button was pressed. The user may experience a couple minutes wait while the system processes the survey. |
|                          | <b>Type</b> Command Button   |
|                          | <b>Hot Key</b> Alt + L   |

| Control           | Description   |  |                   |    |
|-------------------|---|--|-------------------|----|
| Due Date          | A text box containing the due date for the survey.  |  |                   |    |
|                   | <b>Type</b>   | Text Box                               |                   |    |
|                   | <b>Required</b>   | NA                                     |                   |    |
|                   | <b>Length</b>   | NA                                     |                   |    |
|                   | <b>Validation</b>   | Mask of mm/dd/yyyy                     |                   |    |
|                   | <b>Display Only</b>   | Yes                                    | <b>Calculated</b> | No |
|                   | <b>DB Column</b>  | PriceSurvey.DueDt                      |                   |    |
| Survey List       | A text box containing the food survey list that this survey is conducting.  |  |                   |    |
|                   | <b>Type</b>   | Text Box                               |                   |    |
|                   | <b>Required</b>   | NA                                     |                   |    |
|                   | <b>Length</b>   | NA                                     |                   |    |
|                   | <b>Validation</b>   | NA                                     |                   |    |
|                   | <b>Display Only</b>   | Yes                                    | <b>Calculated</b> | No |
|                   | <b>DB Column</b>  | SurveyList.Name                        |                   |    |
| Survey Price Type | Indicates the type of prices requested on the survey. Examples of type are least expensive or most expensive.                 |  |                   |    |
|                   | <b>Type</b>   | Text Box                               |                   |    |
|                   | <b>Required</b>   | NA                                     |                   |    |
|                   | <b>Length</b>   | NA                                     |                   |    |
|                   | <b>Validation</b>   | NA                                     |                   |    |
|                   | <b>Display Only</b>   | Yes                                    | <b>Calculated</b> | No |
|                   | <b>DB Column</b>  | PriceSurvey.TypeCd                     |                   |    |
| Filter By Chain   | The chain of active vendors available in the system. This controls the contents found in the Vendors included in Survey grid. |  |                   |    |
|                   | <b>Type</b>   | List Box                               |                   |    |
|                   | <b>Required</b>   | No                                     |                   |    |
|                   | <b>DB Column</b>  | None                                   |                   |    |
|                   | <b>Code ID</b>  | Vendor Chain table lookup – Chain name |                   |    |

| Control                    | Description   |  |                   |     |
|----------------------------|---|--|-------------------|-----|
| Filter By Owner            | The owners of active vendors available in the system. This controls the contents found in the Vendors included in Survey grid.  |  |                   |     |
|                            | <b>Type</b>   | List Box                               |                   |     |
|                            | <b>Required</b>   | No                                     |                   |     |
|                            | <b>DB Column</b>  | None                                   |                   |     |
|                            | <b>Code ID</b>  | Vendor Owner table lookup – Owner name |                   |     |
| Total Vendors              | A text box used to display the total number of vendors that are selected to participate in the price survey.  |  |                   |     |
|                            | <b>Type</b>   | Text Box                               |                   |     |
|                            | <b>Required</b>   | No                                     |                   |     |
|                            | <b>Length</b>   | 3                                      |                   |     |
|                            | <b>Validation</b>   | NA, Mask of Z9                         |                   |     |
|                            | <b>Display Only</b>   | Yes                                    | <b>Calculated</b> | Yes |
|                            | <b>DB Column</b>  | NA                                     |                   |     |
| Surveys Received           | A text box used to display the number of surveys that have been received (based on vendor’s received date being populated).   |  |                   |     |
|                            | <b>Type</b>   | Text Box                               |                   |     |
|                            | <b>Required</b>   | No                                     |                   |     |
|                            | <b>Length</b>   | 3                                      |                   |     |
|                            | <b>Validation</b>   | NA, Mask of Z9                         |                   |     |
|                            | <b>Display Only</b>   | Yes                                    | <b>Calculated</b> | Yes |
|                            | <b>DB Column</b>  | NA                                     |                   |     |
| Surveys Entered            | A text box used to display the number of surveys that have been returned and have their prices entered into the system (based on vendor’s entered date being populated) |  |                   |     |
|                            | <b>Type</b>   | Text Box                               |                   |     |
|                            | <b>Required</b>   | No                                     |                   |     |
|                            | <b>Length</b>   | 3                                      |                   |     |
|                            | <b>Validation</b>   | NA, Mask of Z9                         |                   |     |
|                            | <b>Display Only</b>   | Yes                                    | <b>Calculated</b> | Yes |
|                            | <b>DB Column</b>  | NA                                     |                   |     |
| Vendors Included in Survey | A data grid used to display and select vendors to participate in the price survey.  |  |                   |     |
|                            | <b>Type</b>   | Display Only Data Grid                 |                   |     |

| Control   | Description   |                                     |                   |    |
|-----------|---|-------------------------------------|-------------------|----|
| LA ID     | The local agency of the vendor.   |                                     |                   |    |
|           | <b>Format</b>   | 2 Digit Number                      | <b>Calculated</b> | No |
|           | <b>DB Column</b>  | Vendor.LA_ID                        |                   |    |
| Vendor ID | The ID of the vendor.   |                                     |                   |    |
|           | <b>Display Only</b>   | Yes                                 | <b>Calculated</b> | No |
|           | <b>DB Column</b>  | Vendor.FFVendor_ID                  |                   |    |
| Name      | The name of vendor.   |                                     |                   |    |
|           | <b>Type</b>   | Link to Record Vendor Survey Pop-Up |                   |    |
|           | <b>Format</b>   | Name of vendor                      | <b>Calculated</b> | No |
|           | <b>DB Column</b>  | Vendor.StoreName                    |                   |    |
| PG#       | The assigned peer group of the vendor that is displayed for selection in the food price survey.     |                                     |                   |    |
|           | <b>Format</b>   | 2 digit number, Mask of Z9          | <b>Calculated</b> | No |
|           | <b>DB Column</b>  | VendorStore.PG_ID                   |                   |    |
| Received? | Indicates whether the vendor's results were received (based on whether Received Date is filled in). |                                     |                   |    |
|           | <b>Format</b>   | Yes or No                           | <b>Calculated</b> | No |
|           | <b>DB Column</b>  | SurveyVendor.ReceivedDt             |                   |    |
| Entered?  | Indicates whether the vendor's results were entered.  |                                     |                   |    |
|           | <b>Format</b>   | Yes or No                           | <b>Calculated</b> | No |
|           | <b>DB Column</b>  | SurveyVendor.CompletedDt            |                   |    |

| Business Rules  |
|---|
| <ol style="list-style-type: none"> <li>1. The Surveys list box should be sorted by the due date of the records.</li> <li>2. Default Filter By Chain to blank.</li> <li>3. Default Filter By Owner to blank.</li> <li>4. The list of vendors accessible should only be selected vendors for that survey that are assigned to any active local agencies to which the user has access.</li> <li>5. Total vendors are calculated by counting the vendors with checkbox checked.</li> <li>6. Surveys Received is calculated by counting the vendors whose Received Date is recorded.</li> <li>7. Surveys Entered is calculated by counting the vendors whose Entered Date is recorded.</li> <li>8. Sort list by Agency (ascending) and Vendor ID (Ascending).</li> </ol> |

**Business Rules**

9. When the System.FoodBenefitDeliveryMethod system parameter is set to "EBT", the Calculate Average Prices command button is not shown.
10. The Calculate Average Prices command button should only be available to designated state authorized personnel.
11. The Calculate Average Prices command button is only enabled if at least one vendor has completed a survey that contains a non-CVV item.
12. The Calculate Average Prices command button is used to tell the system to process the survey creating a Survey Results instance. This instance will be named by the date and time of when the button was pressed. The user may experience a couple minutes wait while the system processes the survey.
13. A state must conduct its price survey using either average of samples or maximum value of samples (identified by the Config Parm "Vendor.PriceSurveyStateCalcType").
  - a. For average of samples: The statewide average prices and the peer group average prices are calculated by:
    - \*Statewide Average Calculation:  
From the survey, add all prices for all vendors EXCEPT THOSE MARKED AS 50% WIC STORES (Config Parm "Vendor.WIC50%PeerGroupNbr") for a container then divide the total by the number of sample food items to determine the statewide average price. Store these values in the peer group occurrence that has the peer group number of the Config Parm "Vendor.WIC50%PeerGroupNbr".
    - \*Peer Group Average Calculation:  
From the survey, add all prices for all vendors within each peer group for each container, then divide the total by the number of sample food items in the peer group to determine the peer group average price. 50% WIC Stores (in the peer group identified by the Config Parm "Vendor.WIC50%PeerGroupNbr") do not need to have this calculation. They use the Statewide Average Calculation.
  - b. For maximum value of samples: The statewide average prices and the peer group average prices are calculated by (Note the use of the term of average is misleading as it is the high value; but, that is the requirement.):
    - \*Statewide Maximum Value Calculation:  
From the survey, determine the maximum value of all prices for all vendors EXCEPT THOSE MARKED AS 50% WIC STORES (Config Parm "Vendor.WIC50%PeerGroupNbr") for a container by examining all the sample food items. Store these values in the peer group occurrence that has the peer group number of the Config Parm "Vendor.WIC50%PeerGroupNbr".
    - \*Peer Group Maximum Value Calculation:  
From the survey, determine the maximum value of all prices for all vendors within each peer group for each container by examining all the sample food items. 50% WIC Stores (in the peer group identified by the Config Parm "Vendor.WIC50%PeerGroupNbr") do not need to have this calculation. They use the Statewide Average Calculation.
14. A state must conduct its price survey using either percentage factoring or standard deviation factoring (identified by the Config Parm "Vendor.PricingStateType").
  - a. For Percentage factoring: There is no special price survey calculation. The percentage is maintained using the online screens.

**Business Rules**

- b. For Standard Deviation factoring: The statewide average prices and the peer group average prices are calculated by:

\*Statewide Average Calculation:

From the survey, add all prices for all vendors EXCEPT THOSE MARKED AS 50% WIC STORES (Config Parm "Vendor.WIC50%PeerGroupNbr") for a container then divide the total by the number of food items to determine the statewide average price. The number of food items is the sample number. Store these values in the peer group occurrence that has the peer group number of the Config Parm "Vendor.WIC50%PeerGroupNbr". Note: There is no standard deviation calculated for the statewide average. The value that should be stored is zero.

\*Peer Group Average Calculation:

From the survey, add all prices for all vendors within each peer group for each container, then divide the total by the number of food items in the peer group to determine the peer group average price. The number of food items is the sample number. Calculate the standard deviation on each container size for the peer group." Standard deviation is applied at the container level in order to calculate the maximum value for the food instrument. 50% WIC Stores (in the peer group identified by the Config Parm "Vendor.WIC50%PeerGroupNbr") do not need to have this calculation. They use the Statewide Average Calculation.

15. When the Calculate Average Prices is pressed, Confirm with user (as a forced save of all work is done after generating the container peer group price records). Ask "Do you want to save all your work including the calculating of average price results?".
16. When the Calculate Average Price button is pressed, exclude CVV detail products from any price calculations. They are only surveyed for authorization based surveys.

**Developer Notes**

1. Grid should display as much as the screen real estate allows.
2. The Calculate Average Price button should only be available to designated statewide personnel. This can be done via a security role.

### 1.3.1.1 Record Vendor Survey Pop-Up

The Record Vendor Survey Pop-Up is used to record vendors' specific food prices from the survey. Prices entered here are the prices returned to the vendor coordinator from the specific vendor.

Vendor: 77-008 Medcap Pharmacy      Local Agency: 17 Boulder County Public Health

Received Date: 11/20/2006

Entered Date: 11/30/2006

Updated all associated chains in this survey

Filter By Category:

| Surveyed UPC Detail Products |     |        |                   |         |          |        |             |          |
|------------------------------|-----|--------|-------------------|---------|----------|--------|-------------|----------|
|                              | Qty | UOM    | Description       | UPC     | Category | Price  | Modify Date | External |
| >                            | 16  | Ounces | Kelloggs Wheaties | 12345   | Cereal   | \$2.89 | 11/22/2006  | Yes      |
|                              | 16  | Ounces | WIC Cereal        | 12456   | Cereal   | \$2.49 | 11/23/2006  | Yes      |
|                              | 1   | Gallon | Whole Milk        | 6354695 | Milk     | \$3.02 | 11/20/2006  | No       |

Close    Print

| Control      | Description   |            |    |
|--------------|---|------------|----|
| Vendor       | The ID and name of the selected vendor.                     |            |    |
| Type         | Text Box  |            |    |
| Required     | NA  |            |    |
| Length       | NA  |            |    |
| Validation   | NA  |            |    |
| Display Only | Yes   | Calculated | No |
| DB Column    | Vendor.PrefixNr<br>Vendor.FFVendor_ID +<br>Vendor.StoreName |            |    |

| Control                                     | Description   |   |                   |    |
|---|---|---|-------------------|----|
| Local Agency                                | The ID and name of the local agency for this vendor.  |   |                   |    |
|   | <b>Type</b>   | Text Box  |                   |    |
|   | <b>Required</b>   | NA  |                   |    |
|   | <b>Length</b>   | NA  |                   |    |
|   | <b>Validation</b>   | NA  |                   |    |
|   | <b>Display Only</b>   | Yes   | <b>Calculated</b> | No |
|   | <b>DB Column</b>  | Vendor.LA_ID<br>LocalAgency.FFLocalAgencyID +<br>LocalAgency.Name |                   |    |
| Received Date                               | The date that the selected vendor's results were received.  |   |                   |    |
|   | <b>Type</b>   | Date Picker   |                   |    |
|   | <b>Required</b>   | No  |                   |    |
|   | <b>Display Only</b>   | No  | <b>Calculated</b> | No |
|   | <b>DB Column</b>  | SurveyVendor.ReceivedDt   |                   |    |
| Entered Date                                | The date that the selected vendor's results were entered.   |   |                   |    |
|   | <b>Type</b>   | Date Picker   |                   |    |
|   | <b>Required</b>   | No  |                   |    |
|   | <b>Display Only</b>   | No  | <b>Calculated</b> | No |
|   | <b>DB Column</b>  | SurveyVendor.CompletedDt  |                   |    |
| Update all associated chains in this survey | When this checkbox is selected, every vendor that is part of the chain in this survey will have its price survey updated with the prices that were entered on this vendor. This function should be used with caution. |   |                   |    |
|   | <b>Type</b>   | Checkbox  |                   |    |
|   | <b>DB Column</b>  | NA  |                   |    |
| Filter By Category                          | The category that filters the contents in the data grid.  |   |                   |    |
|   | <b>Type</b>   | List Box  |                   |    |
|   | <b>Required</b>   | No  |                   |    |
|   | <b>Code ID</b>  | Food Category   |                   |    |
| Surveyed UPC Detail Products                | The surveyed UPC detail products data grid is used to view and enter the prices from the survey.  |   |                   |    |
|   | <b>Type</b>   | Data Grid   |                   |    |

| Control                | Description  |                               |                   |    |
|------------------------|--|-------------------------------|-------------------|----|
| Qty<br>(For FI States) | The quantity, in relation to the size, of the surveyed product.    |                               |                   |    |
|                        | <b>Type</b>  | Text Box                      |                   |    |
|                        | <b>Required</b>  | NA                            |                   |    |
|                        | <b>Length</b>  | 3                             |                   |    |
|                        | <b>Validation</b>  | NA, Mask of Z9                |                   |    |
|                        | <b>Display Only</b>  | Yes                           | <b>Calculated</b> | No |
|                        | <b>DB Column</b>   | DetailProduct.Quantity        |                   |    |
| UOM<br>(For FI States) | The unit of measure (i.e. container size) of the surveyed product. |                               |                   |    |
|                        | <b>Type</b>  | Text Box                      |                   |    |
|                        | <b>Required</b>  | NA                            |                   |    |
|                        | <b>Length</b>  | NA, Display length of 10      |                   |    |
|                        | <b>Validation</b>  | NA                            |                   |    |
|                        | <b>Display Only</b>  | Yes                           | <b>Calculated</b> | No |
|                        | <b>DB Column</b>   | ProdContainer.ContainerSizeCd |                   |    |
| Description            | The detail product description of the surveyed product.            |                               |                   |    |
|                        | <b>Type</b>  | Text Box                      |                   |    |
|                        | <b>Required</b>  | NA                            |                   |    |
|                        | <b>Length</b>  | NA, Display length of 20      |                   |    |
|                        | <b>Validation</b>  | NA                            |                   |    |
|                        | <b>Display Only</b>  | Yes                           | <b>Calculated</b> | No |
|                        | <b>DB Column</b>   | DetailProduct.Description     |                   |    |
| UPC                    | The detail product UPC of the surveyed product.                    |                               |                   |    |
|                        | <b>Type</b>  | Text Box                      |                   |    |
|                        | <b>Required</b>  | NA                            |                   |    |
|                        | <b>Length</b>  | NA, Display length of 15      |                   |    |
|                        | <b>Validation</b>  | NA                            |                   |    |
|                        | <b>Display Only</b>  | Yes                           | <b>Calculated</b> | No |
|                        | <b>DB Column</b>   | DetailProduct.UPC             |                   |    |

| Control     | Description   |   |                   |    |
|-------------|---|---|-------------------|----|
| Category    | The food category of the UPC detail product.  |   |                   |    |
|             | <b>Type</b>   | Text Box  |                   |    |
|             | <b>Required</b>   | NA  |                   |    |
|             | <b>Length</b>   | NA, Display length of 20                            |                   |    |
|             | <b>Validation</b>   | NA  |                   |    |
|             | <b>Display Only</b>   | Yes   | <b>Calculated</b> | No |
|             | <b>DB Column</b>  | FoodCategory.CategoryNr<br>FoodCategory.Name        |                   |    |
| Price       | The price of the selected surveyed UPC detail product as reported by the currently selected vendor. |   |                   |    |
|             | <b>Type</b>   | Text Box  |                   |    |
|             | <b>Required</b>   | No  |                   |    |
|             | <b>Length</b>   | Decimal 9,5   |                   |    |
|             | <b>Validation</b>   | Numeric, Mask of \$Z,Z99.99,<br>Display length of 6 |                   |    |
|             | <b>Display Only</b>   | No  | <b>Calculated</b> | No |
|             | <b>DB Column</b>  | SurveyProduct.PriceAmt                              |                   |    |
| Modify Date | The date that the price survey row was last updated   |   |                   |    |
|             | <b>Type</b>   | Text Box  |                   |    |
|             | <b>Required</b>   | NA  |                   |    |
|             | <b>Length</b>   | NA  |                   |    |
|             | <b>Validation</b>   | Mask of mm/dd/yyyy                                  |                   |    |
|             | <b>Display Only</b>   | Yes   | <b>Calculated</b> | No |
|             | <b>DB Column</b>  | SurveyProduct.ModifyDt                              |                   |    |
| External    | Indicates whether the last update of the price survey row was done externally on the web.           |   |                   |    |
|             | <b>Type</b>   | Text Box  |                   |    |
|             | <b>Required</b>   | NA  |                   |    |
|             | <b>Length</b>   | NA  |                   |    |
|             | <b>Validation</b>   | NA  |                   |    |
|             | <b>Display Only</b>   | Yes   | <b>Calculated</b> | No |
|             | <b>DB Column</b>  | SurveyProduct.Externalln                            |                   |    |

| Control                          | Description   |   |            |    |
|----------------------------------|---|---|------------|----|
| Close                            | The Close command button closes the pop-up, returning to the Record Survey Screen and retaining data entry.                       |   |            |    |
|                                  | Type  | Command Button                                      |            |    |
|                                  | Hot Key   | Alt + C   |            |    |
| Print<br><br>(EBT Only)          | Clicking the Print command button will create the Vendor Survey Price Comparison output.  |   |            |    |
|                                  | Type  | Command Button                                      |            |    |
|                                  | Hot Key   | Alt + P   |            |    |
| <Last Modified By User and Date> | In the lower right-hand corner, the user and the date of the last update of the vendor survey or UPC price records are displayed. |   |            |    |
|                                  | Type  | Text Box  |            |    |
|                                  | Required  | No  |            |    |
|                                  | Length  | NA  |            |    |
|                                  | Validation  | Mask of 'firstname lastname mm/dd/yyyy'             |            |    |
|                                  | Display Only  | Yes   | Calculated | No |
|                                  | DB Column   | SurveyProduct.ModifyStfpID + SurveyProduct.ModifyDt |            |    |

| Business Rules  |
|---|
| <ol style="list-style-type: none"> <li>1. The format of the Filter By Category is Category Name (i.e. "Milk").</li> <li>2. When "Update all associated chains in this survey" is used, update every surveyed vendor who is in the same chain with the prices and dates from the vendor.</li> <li>3. When "Update all associated chains in this survey" is used and a vendor in the same chain has 'results recorded', do not update (i.e. overlay) these prices. 'Results recorded' is based on whether a received date or entered date is found.</li> <li>4. Display an error message if the "chain" checkbox is selected and another vendor associated within the same chain has its checkbox selected (two sources of replication can not be allowed).</li> <li>5. Sort the detailed products in the same order as in the printed survey.</li> <li>6. An error message must prevent the user from putting in a price that is not in the range of (this check is only valid if a vendor has a peer group):             <ol style="list-style-type: none"> <li>a. Maximum:                 <ol style="list-style-type: none"> <li>i. A non-blank value found in the food container/category Price Survey Maximum Override price or</li> <li>ii. The current maximum price</li> </ol> </li> <li>b. Minimum:                 <ol style="list-style-type: none"> <li>i. A non-blank value found in the food container/category Price Survey Minimum Override price or</li> <li>ii. The current minimum price. This calculation is similar to the current maximum, but it is below the average price.</li> </ol> </li> </ol> </li> </ol> |

| Business Rules   |
|--|
| 7. When the System.FoodBenefitDeliveryMethod system parameter is set to "EBT", the Units and UOM columns are not shown.    |
| 8. When the System.FoodBenefitDeliveryMethod system parameter is set to "FI", the Print command button is not shown.       |
| 9. When the Print command button is clicked, an error will be displayed if the vendor does not have a peer group assigned. |
| 10. Disable the "Update all associated chains in this survey" checkbox if the vendor is not in a chain.                    |

| Developer Notes  |
|--|
| 1. Grid should display as much as the screen real estate allows. |
| 2. Print button would force a save before producing the output.  |

**1.3.1.2 Vendor Price Survey Comparison (Static) (EBT Only)**

The Vendor Price Survey Comparison output is a printout of contents of the entered vendor price survey against the current pricing of the peer group that the vendor is associated with. The primary purpose of this function is during vendor authorization or reauthorization. It is only available for EBT delivery states due to pricing being available at the UPC level. Paper FI delivery states have a similar capability with the Survey Results screen as their pricing is at the container level.

**1.3.1.2.1 Language: English**

The Price Survey Comparison is printed in English only.

**1.3.1.2.2 Mockup**

| Vendor Price Survey Comparison |                |                   |               |                        |                |
|--------------------------------|----------------|-------------------|---------------|------------------------|----------------|
| March 30, 2007                 |                |                   |               |                        |                |
| 01002 Medcap Pharmacy          |                |                   |               |                        |                |
| Peer Group 3                   |                |                   |               |                        |                |
| UPC Detail Product             | Vendor Price   | Peer Group Price  | Difference    | Peer Group Std Dev Amt | Vendor Std Dev |
| 123456789 Producta             | \$3.23         | \$3.12348         | \$0.11        | \$0.05320              | 2.00226        |
| 138576234 Productc             | \$2.45         | \$2.45000         | \$0.00        | \$0.06343              | 0.00000        |
| 148573469 Productd             | \$6.78         | \$6.58312         | \$0.20        | \$0.11212              | 1.75598        |
| 166345646 Productb             | \$1.00         | \$1.10000         | -\$0.10       | \$0.05000              | -2.00000       |
| <b>Survey Total</b>            | <b>\$13.46</b> | <b>\$13.25660</b> | <b>\$0.20</b> |                        |                |

| Business Rules  |
|---|
| 1. The date listed in the output is the current date of the output. |

| Business Rules   |
|--|
| 2. Peer Group Price and Peer Group Std Dev Amt is the current amounts for the UPC Detail product based on the Vendor's peer group number.  |
| 3. Difference is calculated by subtracting the Peer Group Price from the Vendor Price.   |
| 4. Vendor Std Dev is calculated by dividing Difference by the Peer Group Std Dev Amt.  |
| 5. Totals are calculated as sum of their respective columns. The Difference column total is calculated based on the sum of the calculated values where rounding may cause the total to off by a penny or so. |

### 1.3.2 Survey Results (FI Only)

This screen will be available to the system when the System.FoodBenefitDeliveryMethod system parameter is set to "FI". For EBT states, applying prices is disabled. (This is done by the weekly UPC Peer Group Price Resetting batch job).

The Survey Results screen has two primary purposes. First, it is used to display the resultant survey's average and maximum prices for the container and its peer groups that participated in the survey. The maximum price is calculated by multiplying the factors (setup in the Container Peer Group screen) by the survey prices. A state must conduct its price survey using either percentage factoring or standard deviation factoring.

Second, it is used to apply the resultant survey's average and maximum prices to the container and its peer groups. Total control is given over which records have it applied. It is important to note that all product categories must be reviewed and the inclusion set prior to "Applying" the survey prices. Also, vendor price survey records are created for the high risk vendor analysis report D.

The Include All and Include None command buttons are for convenience purposes when working with the grid.

Container / Peer Groups (Grid if the state is a "Percentage" state)

> Price Surveys > Process Survey > Survey Results

Surveys

Processed Dates  << >>

Effective Date

Filter By Category

| Subcategory Container / Peer Groups |                                   |    |            |            |          |        |            |          |           |                                     |
|-------------------------------------|-----------------------------------|----|------------|------------|----------|--------|------------|----------|-----------|-------------------------------------|
|                                     | Description                       | PG | Last Date  | Last Price | Last Max | Sample | Surv Price | Surv Max | OR Price  | Include                             |
| >                                   | Natural Cheese- WIC Approved Only | 3  | 11/15/2006 | \$9.99000  | \$10.36  | 5      | \$6.32000  | \$11.03  | \$6.54000 | <input checked="" type="checkbox"/> |
|                                     | Dozen Large Eggs                  | 8  | 11/24/2006 | \$32.00310 | \$5.24   | 9      | \$2.98000  | \$6.58   |           | <input checked="" type="checkbox"/> |
|                                     | Gallon Milk                       | 5  | 11/21/2006 | \$35.01565 | \$9.36   | 3      | \$5.65050  | \$12.68  |           | <input checked="" type="checkbox"/> |

Container / Peer Groups (Grid if the state is a "Standard Deviation" state)

> Price Surveys > Process Survey > Survey Results

Surveys Egg, Cheese and Milk Survey November 2006

Processed Dates 11/28/2006 12:33:54 << >>

Effective Date \_/\_/

Filter By Category >

| Subcategory Container / Peer Groups |                                   |    |            |            |         |          |        |            |         |          |           |         |                          |
|-------------------------------------|-----------------------------------|----|------------|------------|---------|----------|--------|------------|---------|----------|-----------|---------|--------------------------|
|                                     | Description                       | PG | Last Date  | Last Price | Last SD | Last Max | Sample | Surv Price | Surv SD | Surv Max | OR Price  | OR SD   | Include                  |
| >                                   | Natural Cheese- WIC Approved Only | 3  | 11/15/2006 | \$9.99000  | \$0.654 | \$10.36  | 5      | \$6.32000  | \$0.354 | \$11.03  | \$6.45000 | \$0.654 | <input type="checkbox"/> |
|                                     | Dozen Large Eggs                  | 8  | 11/24/2006 | \$32.00310 | \$1.065 | \$5.24   | 9      | \$2.98000  | \$0.987 | \$6.58   |           |         | <input type="checkbox"/> |
|                                     | Gallon Milk                       | 5  | 11/21/2006 | \$35.01565 | \$0.316 | \$9.36   | 3      | \$5.65050  | \$0.984 | \$12.68  |           |         | <input type="checkbox"/> |

| Control         | Description   |                           |            |    |
|-----------------|---|---------------------------|------------|----|
| Surveys         | A listing of price surveys.   |                           |            |    |
|                 | Type  | Record Selector           |            |    |
|                 | Required  | No                        |            |    |
|                 | DB Column   | PriceSurvey.Name          |            |    |
|                 | Code ID   | Price Survey table lookup |            |    |
| Apply Prices    | The Apply command button applies the survey prices of all selected items in the Subcategory Container / Peer Group grid to the price tables in the system (using effective date).   |                           |            |    |
|                 | Type  | Command Button            |            |    |
|                 | Hot Key   | Alt + L                   |            |    |
| Processed Dates | This is the record selector for the Survey Results records. The records were named by concatenating the process date and the time the button was pressed. The drop-down and spin control allow selection of survey results records. |                           |            |    |
|                 | Type  | Record Selector           |            |    |
|                 | Length  | 50                        |            |    |
|                 | DB Column   | SurveyResult.ProcessDt    |            |    |
| Effective Date  | This is the date when applying survey prices that the prices would become effective (for the "included" Subcategory Container / Peer Group occurrences).  |                           |            |    |
|                 | Type  | Date Picker               |            |    |
|                 | Required  | Yes                       |            |    |
|                 | Display Only  | No                        | Calculated | No |
|                 | DB Column   | NA (used as input)        |            |    |

| Control                             | Description   |                           |                   |    |
|-------------------------------------|---|---------------------------|-------------------|----|
| Filter By Category                  | The category of the food for the Subcategory Container/Peer Groups results that should be displayed/processed in the data grid.   |                           |                   |    |
|                                     | <b>Type</b>   | List Box                  |                   |    |
|                                     | <b>Required</b>   | No                        |                   |    |
|                                     | <b>Code ID</b>  | Food Category             |                   |    |
| Include All                         | The Include All command button causes the checkboxes for all displayed items in the grid to be selected (checked). This is for convenience purposes; no action occurs within the system.                            |                           |                   |    |
|                                     | <b>Type</b>   | Command Button            |                   |    |
|                                     | <b>Hot Key</b>  | Alt + I                   |                   |    |
| Include None                        | The Include None command button causes the checkboxes for all displayed items in the Container/Peer Group grid to be de-selected (unchecked). This is for convenience purposes; no action occurs within the system. |                           |                   |    |
|                                     | <b>Type</b>   | Command Button            |                   |    |
|                                     | <b>Hot Key</b>  | Alt + U                   |                   |    |
| Subcategory Container / Peer Groups | This is a data grid of all the subcategory container/peer groups that had activity.   |                           |                   |    |
|                                     | <b>Type</b>   | Data Grid                 |                   |    |
| Description                         | The subcategory container name.   |                           |                   |    |
|                                     | <b>Type</b>   | Text Box                  |                   |    |
|                                     | <b>Required</b>   | NA                        |                   |    |
|                                     | <b>Length</b>   | 30, Initial Display of 15 |                   |    |
|                                     | <b>Validation</b>   | NA                        |                   |    |
|                                     | <b>Display Only</b>   | Yes                       | <b>Calculated</b> | No |
|                                     | <b>DB Column</b>  | ProdContainer.FIDc        |                   |    |
| PG                                  | The number of the peer group or Statewide (for Statewide rows).   |                           |                   |    |
|                                     | <b>Type</b>   | Text Box                  |                   |    |
|                                     | <b>Required</b>   | NA                        |                   |    |
|                                     | <b>Length</b>   | 10                        |                   |    |
|                                     | <b>Validation</b>   | NA                        |                   |    |
|                                     | <b>Display Only</b>   | Yes                       | <b>Calculated</b> | No |
|                                     | <b>DB Column</b>  | ContainerPeerGroup.PG_ID  |                   |    |

| Control   | Description  |                                      |                   |    |
|---|--|--------------------------------------|-------------------|----|
| Last Dt   | The date of the most recent record of the peer group for the displayed description.  |                                      |                   |    |
|   | <b>Type</b>  | Text Box                             |                   |    |
|   | <b>Required</b>  | NA                                   |                   |    |
|   | <b>Length</b>  | NA                                   |                   |    |
|   | <b>Validation</b>  | Mask of mm/dd/yyyy                   |                   |    |
|   | <b>Display Only</b>  | Yes                                  | <b>Calculated</b> | No |
|   | <b>DB Column</b>   | ContainerPeerGroup.EffectiveDt       |                   |    |
| Last Price  | The current price of the peer group for the displayed description.   |                                      |                   |    |
|   | <b>Type</b>  | Text Box                             |                   |    |
|   | <b>Required</b>  | NA                                   |                   |    |
|   | <b>Length</b>  | NA                                   |                   |    |
|   | <b>Validation</b>  | Mask of \$Z,ZZ9.99999                |                   |    |
|   | <b>Display Only</b>  | Yes                                  | <b>Calculated</b> | No |
|   | <b>DB Column</b>   | ContainerPeerGroup.PriceAmt          |                   |    |
| Last SD<br>(Standard Deviation based states only) | The standard deviation of the most recent record of the peer group for the displayed description. These records are managed in the food management peer group pricing screens. |                                      |                   |    |
|   | <b>Type</b>  | Text Box                             |                   |    |
|   | <b>Required</b>  | NA                                   |                   |    |
|   | <b>Length</b>  | NA                                   |                   |    |
|   | <b>Validation</b>  | Mask of \$Z9.999                     |                   |    |
|   | <b>Display Only</b>  | Yes                                  | <b>Calculated</b> | No |
|   | <b>DB Column</b>   | ContainerPeerGroup.StandardDeviation |                   |    |

| Control    | Description  |  |                   |     |
|------------|--|--|-------------------|-----|
| Last Max   | The maximum price of the last (usually current) record of the peer group for the displayed description. These records are managed in the food management peer group pricing screens. |  |                   |     |
|            | <b>Type</b>  | Text Box   |                   |     |
|            | <b>Required</b>  | NA   |                   |     |
|            | <b>Length</b>  | NA   |                   |     |
|            | <b>Validation</b>  | Mask of \$Z,ZZ9.99   |                   |     |
|            | <b>Display Only</b>  | Yes  | <b>Calculated</b> | Yes |
|            | <b>DB Column</b>   | For Pct States:<br>ContainerPeerGroup.PriceAmt *<br>ContainerPeerGroup.Factor<br>For Std Dev States:<br>ContainerPeerGroup.PriceAmt +<br>(ContainerPeerGroup.StandardDeviation *<br>ContainerPeerGroup.Factor) |                   |     |
| Sample     | The number of sample in the survey for the peer group for the displayed description.   |  |                   |     |
|            | <b>Type</b>  | Text Box   |                   |     |
|            | <b>Required</b>  | NA   |                   |     |
|            | <b>Length</b>  | 3  |                   |     |
|            | <b>Validation</b>  | NA   |                   |     |
|            | <b>Display Only</b>  | Yes  | <b>Calculated</b> | No  |
|            | <b>DB Column</b>   | SurveyResultsDetail.Sample   |                   |     |
| Surv Price | The calculated average survey price of the peer group for the displayed description.   |  |                   |     |
|            | <b>Type</b>  | Text Box   |                   |     |
|            | <b>Required</b>  | NA   |                   |     |
|            | <b>Length</b>  | NA   |                   |     |
|            | <b>Validation</b>  | Mask of \$Z,ZZ9.99999  |                   |     |
|            | <b>Display Only</b>  | Yes  | <b>Calculated</b> | Yes |
|            | <b>DB Column</b>   | SurveyResultsDetail.AvgPriceAmt  |                   |     |

| Control   | Description   |                                |                   |
|---|---|--------------------------------|-------------------|
| Surv SD<br>(Standard Deviation based states only) | The calculated survey standard deviation amount of the peer group for the displayed description.  |                                |                   |
|   | <b>Type</b>   | Text Box                       |                   |
|   | <b>Required</b>   | NA                             |                   |
|   | <b>Length</b>   | NA                             |                   |
|   | <b>Validation</b>   | Mask of \$Z9.999               |                   |
|   | <b>Display Only</b>   | Yes                            | <b>Calculated</b> |
| <b>DB Column</b>                                  | ContainerPeerGroup.StandardDeviation  |                                |                   |
| Surv Max  | The maximum price of the peer group for the displayed description. This is calculated by taking the Survey Price multiplied by the respective factors for the peer group.   |                                |                   |
|   | <b>Type</b>   | Text Box                       |                   |
|   | <b>Required</b>   | No                             |                   |
|   | <b>Length</b>   | NA                             |                   |
|   | <b>Validation</b>   | Mask of \$Z,ZZ9.99             |                   |
|   | <b>Display Only</b>   | Yes                            | <b>Calculated</b> |
| <b>DB Column</b>                                  | For Pct States:<br>SurveyResultsDetail.AvgPriceAmt *<br>ContainerPeerGroup.Factor<br>For Std Dev States:<br>SurveyResultsDetail.AvgPriceAmt +<br>(SurveyResultsDetail.StandardDeviation *<br>ContainerPeerGroup.Factor) |                                |                   |
| OR Price  | When applying the prices in a peer group for the displayed description, this value overrides the average survey price of the peer group.  |                                |                   |
|   | <b>Type</b>   | Text Box                       |                   |
|   | <b>Required</b>   | No                             |                   |
|   | <b>Length</b>   | Decimal 9,5                    |                   |
|   | <b>Validation</b>   | Numeric, Mask of \$Z,ZZ9.99999 |                   |
|   | <b>Display Only</b>   | No                             | <b>Calculated</b> |
| <b>DB Column</b>                                  | SurveyResultsDetail.OverridePriceAmt  |                                |                   |

| Control   | Description  |                           |                   |
|---|--|---------------------------|-------------------|
| OR SD<br>(Standard Deviation based states only) | When applying the prices in a peer group for the displayed description, this value will override the standard deviation of the peer group. |                           |                   |
|   | <b>Type</b>  | Text Box                  |                   |
|   | <b>Required</b>  | No                        |                   |
|   | <b>Length</b>  | Decimal 5,3               |                   |
|   | <b>Validation</b>  | Numeric, Mask of \$Z9.999 |                   |
|   | <b>Display Only</b>  | No                        | <b>Calculated</b> |
| Include   | The Include checkbox is used to include the row to be process when applying prices.  |                           |                   |
|   | <b>Type</b>  | Checkbox                  |                   |
|   | <b>DB Column</b>   | Not Stored                |                   |

| Business Rules  |
|---|
| <ol style="list-style-type: none"> <li>1. Display an error message when the Apply button is pressed and there is not at least one include checkbox checked.</li> <li>2. The Surveys list box should be sorted by the due date of the records.</li> <li>3. The format of the Filter By Category is Category Number and Category Name (i.e. "01 Milk")</li> <li>4. The Survey Results list box should be sorted by the process date of the records.</li> <li>5. The Apply button should only be available to the same designated statewide authorized personnel that can use the Process button on the Record Survey screen.</li> <li>6. The effective date must be greater than the current date.</li> <li>7. If an override value is to be applied, the include checkbox must be selected (checked).</li> <li>8. The WIC 50% peer group is determined based on the Config Parm "Vendor.WIC50%PeerGroupNbr". For vendors with this peer group number, the contents of the Config Parm "Vendor.WIC50%Name" should be displayed.</li> <li>9. When the Apply Prices is pressed, Confirm with user (as a forced save of all work is done after generating the container peer group price records). Ask "Do you want to save all your work including the applying of prices?".</li> </ol> |

| Developer Notes   |
|---|
| <ol style="list-style-type: none"> <li>1. If an override values are entered, use the appropriate factor when applying the price to the container peer group.</li> <li>2. When applying the survey, each container has a new effective date record created for each selected container peer group. If an existing effective date record is found for the selected container peer group, the record should be overwritten.</li> </ol> |

**Developer Notes**

3. The current price, current max price and effective date should be retrieved from the containers' peer group pricing record that has the greatest date (i.e. 20070531 is greater than 20070522). It is labeled current because this is what it should be. However, if the user was to go to the food management screens and "future" date a record this would be what should be retrieved.
4. Grid should display as much as the screen real estate allows.