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Appendix B - SPIRIT Business Rules

The WIC benefits program is governed by federal rules and regulations, which have been built into the WIC applications for SPIRIT. To give SPIRIT flexibility in the implementation of these rules and regulations, the concept of a business rule was designed into the WIC system applications. The behavior of the applications can change depending upon the value of each business rule.

Each business rule can affect the system in a different way depending upon the value it contains:

- A business rule can act as a switch and that turns functionality on or off with the value “Y” (Yes) or “N” (No).
- A business rule can contain a numeric value that is a threshold for the functionality, like the maximum number of days a participant can be certified without their proof of residency.
- A business rule can contain an alphanumeric value that indicates which option SPIRIT chose to use. For example, the system can automatically populate a SOAP note with the most recent anthropometric and blood work information, or from the information recorded when the participant was certified.

This document describes the business rules that control the processes built into the WIC applications. SPIRIT can select the value of each business rule and adjust the applications to fit their WIC benefits program.

The process that is affected by the business rule is listed in this document as well as the section of the WIC Detail Functional Design Document (DFDD) that describes the affected process.

B.1 State Office Agency

Each agency in the WIC program has its own agency number. The WIC State Office is also considered an agency. This business rule allows SPIRIT to indicate the agency number for the WIC State Office. This business rule will be set to 00 for SPIRIT based upon the agency listing that has already been delivered to SPIRIT.

Business Rule: State Office Agency (STATEOFFICEAGENCYID)

DFDD Section: State Office and Vendor Management

Values Allowed

Value	Result
00 – 99	Agency number for the WIC State Office

Current Values

State	Value
SPIRIT	00

B.2 Age Allowed for WIC Statuses

The WIC Clinic application checks that the current age of the participant is valid for their WIC status. The system determines their age by calculating the difference between the current system date and their recorded date of birth. If the participant's age is not valid for their WIC status the system will warn the user and will not let them proceed without making a correction.

The age of an Infant can range from 0 days (newborn) up to 1 day short of 1 year old. The minimum age for a Child is always 1 year old. These three limits are built into the system and do not require business rules.

The following business rules allow SPIRIT to define the upper age limit for a Child as well as the lower and upper age limits for all women. These age limits are measured in years.

Business Rules: Maximum Age for Child (MaximumChildAge); Minimum Age for Women (MinimumWomanAge); Maximum Age for Women (MaximumWomanAge)

DFDD Sections: Clinic, Chapter 07 - Initial Contac; Common Interface Panels, Chapter A - Demographic Information Panels; Application Administration, Chapter 03 - End of Day Processes

The business rule will be set to the listed value for SPIRIT:

Business Rule	SPIRIT
MaximumChildAge	5
MinimumWomanAge	6
MaximumWomanAge	65

B.3 Certify Infants up to First Birthday

The WIC Clinic application automatically determines the certification period when a participant is certified through the Guided Script. The standard certification period for Infants is 6 months from the date that the certification is completed. For example, if an Infant is certified on 03/01/2003 then their certification end date will be 09/01/2003.

This business rule allows SPIRIT to override this standard duration for Infants who are under 6 months of age when they are certified, and instead use the date of their first birthday as the certification end date. For example, if an Infant is certified on 03/01/2003 but they were born on 11/01/2002 then their certification end date will be 11/01/2003.

Business Rule: 1-year Infant Certification (1YRINFANTCERT)

DFDD Section: Clinic, Chapter 10 - Certification Guided Script

Values Allowed

Value	Result
Y	Certify an Infant under 6 months of age up to the date of their first birthday
N	Certify an Infant under 6 months of age for only 6 months

Current Values

State	Value
SPIRIT	Y

B.4 Allow Printing of SOAP Notes

SOAP notes can be recorded in the WIC Clinic application, and may contain sensitive health information.

This business rule allows SPIRIT to prevent the printing of SOAP notes by removing the Print Note command button from the View Notes dialog.

Business Rule: Allow printing of SOAP notes (ALLOWPRINTNOTE)

DFDD Section: Clinic, Chapter 09 - Participant Folder

Values Allowed

Value	Result
Y	Allow printing of SOAP notes
N	Do not allow printing of SOAP notes

Current Values

State	Value
SPIRIT	Y

B.5 Allow VOC Recertification

An applicant can be immediately certified onto SPIRIT WIC program if they supply a Verification of Certification (VOC) document from another WIC program. A participant can also leave SPIRIT and receive WIC services in another state. Then the participant can return to SPIRIT with another VOC document and receive WIC services once again.

This business rule allows SPIRIT to indicate whether this returning participant can be recertified into SPIRIT WIC program using their original State WIC ID, or the participant must go through the applicant prescreening process when they return with a VOC document for the second time and be given a new State WIC ID. The VOC Certification dialog will only be available if the returning participant can be recertified using their original State WIC ID.

Business Rule: Allow VOC recertification with original State WIC ID
(ALLOWVOCRECERT)

DFDD Section: Clinic, Chapter 09 - Participant Folder

Values Allowed

Value	Result
Y	Returning participant can be recertified using their original State WIC ID
N	Returning participant must be given a new State WIC ID

Current Values

State	Value
SPIRIT	Y

B.6 Suggest Medical Update Appointment

When an infant is certified for longer than a six-month period, the federal regulations still require that the WIC clinics record a blood work contact before the infant turns 1 year old. The appointment type Medical Update was specifically created for the scheduling of these blood work contacts.

The Search for Available Appointment dialog in the WIC Clinic application automatically suggests what appointments are due for the members of a household. This business rule allows SPIRIT to indicate that the dialog should suggest a Medical Update appointment for any qualifying infants.

Business Rule: Appointment Scheduling Engine - Suggest Medical Update Appointment (ASEMEDUPDATE)

DFDD Section: Clinic, Chapter 08 - Appointment Scheduling

Values Allowed

Value	Result
Y	Automatically suggest Medical Update appointment
N	Do not suggest Medical Update appointment

Current Values

State	Value
SPIRIT	Y

B.7 Schedule Subsequent Certification Due Appointment (Days before Cert End Date)

When a participant is nearing the end of their certification period, the WIC clinics can schedule a Subsequent Certification appointment with the participant to help encourage their continued participation in the WIC program. The Schedule Subsequent Certification Due Appointments dialog automatically schedules these appointments for all participants who meet the criteria defined by the clinic.

The Schedule Subsequent Certification Due Appointments dialog in the WIC Clinic application will only schedule a Subsequent Certification appointment when a participant is near the end of their certification period. This business rule allows SPIRIT to indicate the number of days that must remain in the current certification period before the dialog will automatically schedule a Subsequent Certification appointment for the participant.

Business Rule: Appointment Scheduling Engine – Number of Days before Certification End Date before Suggesting a Subsequent Certification Due Appointment (ASESUBCERTDAYS)

DFDD Section: Clinic, Chapter 08 - Appointment Scheduling

Values Allowed

Value	Result
0	Schedule Subsequent Certification Due Appointment on Certification End Date
1 - 999	Schedule Subsequent Certification Due Appointment, Number of Days before Certification End Date

Current Values

State	Value
SPIRIT	0

B.8 Capture Medical Home on Participant Folder

On the Additional Info 1 tab of the Demographics panel the clinics can record the name of the medical establishment where the participant receives the majority of their health care. This is called their Medical Home.

This business rule allows SPIRIT to indicate if the Medical Home combo box should display on the Additional Info 1 tab and require an entry from the clinic.

Business Rule: Capture Medical Home (CAPTUREMEDHOME)

DFDD Section: Common Interface Panels, Chapter A - Demographic Information Panels

Values Allowed

Value	Result
Y	Capture Medical Home on Additional Info 1 tab
N	Do not display or capture Medical Home on Additional Info 1 tab

Current Values

State	Value
SPIRIT	Y

B.9 Potential Duplicate Applicant/Participant

After a new applicant is entered on the Applicant Prescreening dialog, the system can automatically search all participants in SPIRIT WIC program and determine if the applicant is potentially a duplicate of an existing participant. The system will display the Potential Duplicate Applicant/Participant dialog when a potential duplicate is found.

This business rule allows SPIRIT to indicate whether the system will automatically determine if an applicant is potentially a duplicate of an existing participant.

SPIRIT has decided that the Potential Duplicate Applicant/Participant dialog will be available in the WIC clinics. Therefore this business rule will be set to Yes (Y) for SPIRIT.

Business Rule: Potential Duplicate Applicant/Participant (SHOWDUPPARTICIPANT)

DFDD Section: Clinic, Chapter 07 - Initial Contact

Values Allowed

Value	Result
Y	Automatically determine if applicant is a potential duplicate
N	Do not automatically determine potential duplicates

Current Values

State	Value
SPIRIT	Y

B.10 Date Displayed on Participant List

After the clinic user performs a search for a participant, the WIC Clinic application displays all of the participants who meet the search criteria on the Participant List dialog. Selected information is displayed at the bottom of this dialog including the certification period for the participant.

The WIC Clinic application records the date when the certification attempt is started (Certification Start Date), and the date that the certification was completed and became effective (Certification Effective Date).

This business rule allows SPIRIT to indicate whether the Certification Start Date or the Certification Effective Date will display at the bottom of the Participant List dialog.

Business Rule: Certification Date in Participant List dialog (CERTDATEINLIST)

DFDD Section: Clinic, Chapter 06 - Search-Selection

Values Allowed

Value	Result
EFFECTIV	Display Certification Effective Date in Participant List dialog
START	Display Certification Start Date in Participant List dialog

Current Values

State	Value
SPIRIT	EFFECTIV

B.11 Participant was Physically Present during Certification

Federal Regulations require the WIC Program to document that the participant was physically present during their certification process. Yes and No radio buttons are displayed on the Demographics dialog of the Certification Guided Script so the user can indicate if the participant was Physically Present. One of these radio buttons must be selected before the participant can be certified.

This business rule allows SPIRIT to indicate that the Physically Present Yes and No radio buttons and Reason Not Present dropdown should be displayed on the Demographics dialog of the Certification Guided Script, and the system will not allow a participant to be certified on the WIC program unless one of the radio buttons are marked.

Business Rule: Participant was Physically Present during Certification
 (PHYSICALLYPRESENT)

DFDD Section: Common Interface Panels, Chapter A - Demographic Information Panels

Values Allowed

Value	Result
Y	Physically Present radio buttons and Reason Not Present dropdown are displayed and are mandatory
N	Physically Present radio buttons and Reason Not Present dropdown are not displayed

Current Values

State	Value
SPIRIT	Y

B.12 Use Previous Certification Priority

The WIC Clinic application automatically assigns a certification priority to the participant based upon the risk factors that were assigned during their certification process. A priority is assigned to each risk factor by SPIRIT.

When risk factor 501 - Possibility of Regression is the only risk factor assigned to the participant, the system can automatically assign the priority for that specific risk factor. Optionally the system can assign the priority from the previous certification instead if risk factor 501 is the only risk factor assigned to the participant (and the participant was previous certified on the WIC program).

This business rule allows SPIRIT to indicate that the system should assign the priority from the previous certification if risk factor 501 was the only risk factor assigned to the current certification.

Business Rule: Use Previous Certification Priority (USEPREVCERTPRIORITY)

DFDD Section: Clinic, Chapter 10 - Certification Guided Script

Values Allowed

Value	Result
Y	Assign priority from the previous certification for risk factor 501
N	Assign the priority given to risk factor 501

Current Values

State	Value
SPIRIT	N

B.13 Certify Participant to the Last Day of the Month

The WIC Clinic application automatically determines the certification period for a participant based upon their WIC status and other information. The certification becomes effective on the current system date and ends on the date when their certification period is over. For example, if a Non-breastfeeding woman gave birth on 11/5/2002 and is certified on 5/5/2003 then her certification end date would be 6 months later on 11/5/2003.

This business rule allows SPIRIT to indicate that the system should adjust the certification end date for Child, Breastfeeding and Non-breastfeeding participants and make it the last day of the month when they become categorically ineligible. In the example above the certification end date for the Non-breastfeeding woman would be 11/30/2003.

Business Rule: Certify to End of Month (CERTTOMONTHEND)

DFDD Section: Clinic, Chapter 10 - Certification Guided Script

Values Allowed

Value	Result
Y	Adjust Certification End Date to be the End of the Month
N	Do not adjust Certification End Date

Current Values

State	Value
SPIRIT	Y

B.14 Adjust Certification End Date for Weekends

The WIC Clinic application automatically determines the certification period for a participant based upon their WIC status and other information. The certification becomes effective on the current system date and ends on the date when their certification period is over. The certification end date can fall on a week day or a weekend.

This business rule allows SPIRIT to indicate that the system should adjust the certification end date to prevent the certification end date from falling on a Saturday or a Sunday. The system will adjust the certification end date to be the Friday that falls before that weekend.

Business Rule: Adjust Certification End Date for Weekends (EndCertBeforeWeekend)

DFDD Section: Clinic, Chapter 10 - Certification Guided Script

Values Allowed

Value	Result
Y	Adjust Certification End Date to be the Friday before the weekend
N	Do not adjust Certification End Date

Current Values

State	Value
SPIRIT	N

B.15 Check Number Length

When WIC and Farmers Market check stock is received using the Add Received Consignment dialog, the system automatically limits the number of digits that can be entered into the serial number fields.

This business rule allows SPIRIT to indicate the maximum number of digits that are permitted in the WIC and Farmers Market check numbers.

Business Rule: Check Number Length (CHECKNUMLENGTH)

DFDD Section: Application Administration, Chapter 01 - System Administration

Values Allowed

Value	Result
1 – 8	Maximum number of digits allowed in check numbers

Current Values

State	Value
SPIRIT	8

B.16 Child Subsequent Certification Blood Work Requirement

The WIC Clinic application automatically requires that a new blood work contact be entered when a participant is certified through the Guided Script. A single blood work contact is usually only valid for one certification period.

This business rule allows SPIRIT to indicate that a blood work contact recorded during a Child's initial certification is also valid for their subsequent certification, as long as the blood work did not indicate anemia.

Business Rule: Check Subsequent Child Certification Blood Work (CHKSUBSEQCERT)

DFDD Section: Clinic, Chapter 10 - Certification Guided Script

Values Allowed

Value	Result
Y	Initial certification blood work contact valid for subsequent Child certification
N	New blood work contact required for subsequent Child certification

Current Values

State	Value
SPIRIT	Y

B.17 Adjunctive Eligibility for Participant or Household

When a clinic user indicates that a participant is adjunctively eligible for the WIC program, this can also indicate that their entire household is also adjunctively eligible. The WIC Clinic application can automatically apply the adjunctive eligibility information to all participants that belong to the same household.

This business rule allows SPIRIT to indicate that the adjunctive eligibility information should only be applied to the participant and not their entire household.

Business Rule: Participant Adjunctive Eligibility (CLIENTADJELIGIBILITY)

DFDD Section: Common Interface Panels, Chapter D - Income Calculator

Values Allowed

Value	Result
Y	Adjunctive eligibility only applies to the participant
N	Adjunctive eligibility applies to the entire household of the participant

Current Values

State	Value
SPIRIT	N

B.18 Household Medicaid Eligibility for Participant or Household

When a Pregnant woman or an Infant is participating in Medicaid then all members of their household are adjunctively eligible for WIC. If the Medicaid check box is selected and the participant is either a Pregnant woman or an Infant, the system will automatically apply the Medicaid adjunctively eligibility to the income information for all of the members in the participant's household.

This business rule allows SPIRIT to indicate that when a Pregnant woman or an Infant is participating in Medicaid, their adjunctive eligibility information should only be applied to themselves and not their entire household.

Business Rule: Medicaid Adjunctive Eligibility
(HOUSEHOLDMEDICAIDELIGIBILITY)

DFDD Section: Common Interface Panels, Chapter D - Income Calculator

Values Allowed

Value	Result
N	Medicaid Adjunctive eligibility only applies to the participant
Y	Medicaid Adjunctive eligibility applies to the entire household of the participant

Current Values

State	Value
SPIRIT	Y

B.19 Maximum Days VOC is Valid

An applicant can be immediately certified onto the SPIRIT WIC program if they supply a Verification of Certification (VOC) document from another WIC program. A participant can also leave SPIRIT and receive WIC services in another state, and then return to SPIRIT with another VOC document to receive WIC services once again. In either case the clinic user must record the certification end date that was printed on the VOC document in the WIC Clinic application.

To prevent unusually long certification periods SPIRIT can decide the maximum number of days that a participant can be certified into their WIC program with a VOC document. When the certification end date from the VOC document is recorded, the system will automatically calculate the number of days between that date and the current system date. The system will display a warning message if the number of days is greater than the maximum allowed, and will not allow the participant to be certified onto SPIRIT WIC program.

The following business rules allow SPIRIT to indicate the maximum number of days that a participant can be certified via a VOC document, based upon their WIC status.

Business Rules

Rule	Description
DAYSVOCVALID_B	Maximum number of days VOC is valid for Breastfeeding status
DAYSVOCVALID_C	Maximum number of days VOC is valid for Child status
DAYSVOCVALID_I	Maximum number of days VOC is valid for Infant status
DAYSVOCVALID_N	Maximum number of days VOC is valid for Non-breastfeeding status
DAYSVOCVALID_P	Maximum number of days VOC is valid for Pregnant status

DFDD Section: Clinic, Chapter 07 - Initial Contact and Chapter 09 - Participant Folder

Values Allowed

Value	Result
1 – 999	Maximum number of days participant can be certified via VOC document

Current Values

State	Rule	Value
SPIRIT	DAYSVOCVVALID_B	180
	DAYSVOCVVALID_C	180
	DAYSVOCVVALID_I	364
	DAYSVOCVVALID_N	180
	DAYSVOCVVALID_P	325

B.20 Delayed Blood Work Report Criteria

The Delayed Blood Work Report prints a detailed report of the participants who have blood work contact records without any recorded results. The report also indicates when the participant is due to be automatically terminated by the system because their certification is dependent upon the blood work results.

This business rule allows SPIRIT to indicate whether the Delayed Blood Work Report should only include participants who have missing blood work results for their current certification period, or if the report should include all participants who have missing blood work results on any past blood work contact.

Business Rule: Delayed Blood Work Report Criteria (DELAYEDBLOOD)

DFDD Section: Clinic, Chapter 13 - System Outputs

Values Allowed

Value	Result
D	Only include participants missing results for their current certification
R	Include participants missing results for any past blood work contact

Current Values

State	Value
SPIRIT	D

B.21 Purge Ineligible Participants

The End of Day application can automatically purge participants who have been marked as ineligible, but only after six (6) months have passed since the date they were marked as ineligible.

This business rule allows SPIRIT to indicate whether the End of Day application will automatically purge ineligible participants.

Business Rule: Purge Ineligible Participants after 6 Months (DELETEINELIGIBLE)

DFDD Section: Application Administration, Chapter 03 - End of Day Processes

Values Allowed

Value	Result
Y	Automatically purge ineligible participants after 6 months
N	Do not automatically purge ineligible participants

Current Values

State	Value
SPIRIT	Y

B.22 Individual Education Contact Required for Check Pickup

Providing nutrition education to participants is one of the primary goals of the WIC program. This is especially true for participants who are considered High Risk. When the High Risk participant returns to the WIC clinic for more checks, the WIC Clinic application will not issue additional checks until an individual nutrition education contact has been recorded for the participant.

This business rule allows SPIRIT to indicate whether an individual nutrition education contact will be required for a High Risk participant before they will be issued additional checks.

Business Rule: Individual Nutrition Education Required for High Risk Participant Checks (EDCONTACTFORCHECKS)

DFDD Section: Clinic, Chapter 11 - Food Instrument Production

Values Allowed

Value	Result
Y	Individual Nutrition Education is required for issuing checks to a High Risk participant
N	Individual Nutrition Education not required for issuing checks to a High Risk participant

Current Values

State	Value
SPIRIT	N

B.23 Help Desk Phone Number

The WIC System Administration application automatically warns the user to contact the Help Desk before they attempt to use any function that can critically impact the system and delivery of services to the WIC participants. The phone number for the Help Desk is displayed as part of this warning message.

This business rule allows SPIRIT to indicate both the phone number and any subsequent action that is required to contact the Help Desk (e.g. “Press 1 to continue”).

Business Rule: Help Desk Phone Number (HELPDESKNUMBER)

DFDD Section: Application Administration, Chapter 01 - System Administration

Values Allowed

Value	Maximum Length
Phone Number	Sixty (60) characters including punctuation marks
Subsequent Action	Eight (8) characters including punctuation marks

Current Values

State	Phone Number	Subsequent Action
SPIRIT	Not applicable	Not applicable

B.24 Allow Zero in Yearly Income Amount

The Update Income Line Item dialog in the WIC Clinic application usually requires that an income amount greater than zero and a proof of income be recorded for each income contact. A yearly income amount of zero is only allowed when the proof of income entry “Affidavit” is selected for the income contact.

This business rule allows SPIRIT to indicate whether yearly income amount of zero is always allowed regardless of the entry selected in the proof of income.

Business Rule: Allow Zero in Yearly Income Amount (ALLOW0YEARLYINCOME)

DFDD Section: Common Interface Panels, Chapter D - Income Calculator

Values Allowed

Value	Result
Y	Income amount of zero is always allowed
N	Income amount of zero is only allowed when “Affidavit” is selected as proof of income

Current Values

State	Value
SPIRIT	N

B.25 Mark Participants with Incomplete Certification Attempts as Ineligible

The End of Day application can automatically mark a participant as ineligible if their certification attempt has not been completed within the allowable time limits. These time limits are governed by other business rules that are also described below.

This business rule allows SPIRIT to indicate whether the End of Day application will automatically mark a participant as ineligible if their certification attempt has not been completed.

Business Rule: Automatically Mark Participants with Incomplete Certification Attempts as Ineligible (INCOMPCERTAUTOINELIG)

DFDD Section: Application Administration, Chapter 03 - End of Day Processes; Clinic, Chapter 09 - Participant Folder

Values Allowed for INCOMPCERTAUTOINELIG

Value	Result
Y	Mark participants with incomplete certification attempts as ineligible
N	Do not mark participants with incomplete certification attempts as ineligible

Current Values

State	Value
SPIRIT	Y

The allowable time limits for the incomplete certifications are defined by the following rules.

Business Rules

Rule	Description
INCOMPCERTLIMITMIGRANT	Maximum number of days incomplete certification is allowed for Migrant status
INCOMPCERTLIMITPREGNANT	Maximum number of days incomplete certification is allowed for Pregnant status
INCOMPCERTLIMITOTHER	Maximum number of days incomplete certification is allowed for all other statuses

DFDD Section: Application Administration, Chapter 03 - End of Day Processes; Clinic, Chapter 09 - Participant Folder

Values Allowed

Value	Result
1 – 999	Maximum number of days participant can have an incomplete certification

Current Values

State	Rule	Value
SPIRIT	INCOMPCERTLIMITMIGRANT	60
	INCOMPCERTLIMITPREGNANT	60
	INCOMPCERTLIMITOTHER	60

B.26 Infant Certification Blood Work Requirement

The WIC Clinic application automatically requires that a new blood work contact be entered when a participant is certified through the Guided Script. A single blood work contact is usually only valid for one certification period.

Blood work is not required for an Infant certification until they reach a specific minimum age. This business rule allows SPIRIT to change the minimum age in months when a blood work contact is first required for an Infant.

Business Rule: Infant Certification Blood Work Requirement (INFANTBLOODWORK)

DFDD Section: Clinic, Chapter 10 - Certification Guided Script

Values Allowed

Value	Result
1 – 11	Age in months when blood work contact is first required for an Infant

Current Values

State	Value
SPIRIT	9

B.27 Use New Pregnancy Defaults

At the start of the certification process for a woman, the WIC Clinic application automatically displays the Certification WIC Status dialog. This dialog allows the clinic to choose the WIC status for the woman certification and whether she is in a new pregnancy or is being certified postpartum for a previously recorded pregnancy. Usually the system initially defaults the WIC status to Pregnant and assumes this is a new pregnancy; and then the clinic can then chose what is appropriate for their participant.

If the clinic staff is not careful they can start a new certification for a Breastfeeding or Non-breastfeeding woman without indicating that she was previously Pregnant and the new certification is a continuation of that pregnancy. If the system assumes the new certification is also a new pregnancy, and the user does not indicate otherwise, the postpartum information on the new certification will not be linked to the pregnancy information on the previous certification.

To help encourage their clinic staff to make the correct choices, the state of Indiana implemented an enhancement that further refined these default values as described below:

B.27.1 Initial Defaults

The Certification WIC Status dialog will not default a selection in the This woman will be certified as Radio Button Group when the IsNewPregDefaults business rule is active. Also, the Is this a new pregnancy Radio Button Group will be disabled until a selection is made in the This woman will be certified as Radio Button Group. If the selection in the This woman will be certified as Radio Button Group is changed, any selection in the Is this a new pregnancy Radio Button Group will automatically be cleared so the user must explicitly select either Yes or No once again.

The Certification WIC Status dialog will also default the Yes radio button in the Is this a new pregnancy Radio Button Group and leave the group enabled to allow the user to make their selection when the following is true:

- The IsNewPregDefaults business rule is active.
- The previous certification attempt was not completed.
- The incomplete certification attempt was either terminated for the reason *No Nutritional Need* or the attempt was marked as ineligible for either the reason *Over Income* or *Certification attempt not completed in time*.

B.27.2 WIC Status Selection

The Certification WIC Status dialog will default a selection in the Is this a new pregnancy Radio Button Group when the IsNewPregDefaults business rule is active. The defaulted selection is dependent upon both the WIC status selected in the This woman will be certified as Radio Button Group and the WIC status of the current certification, as follows:

B.27.2.1 Pregnant

If the Pregnant radio button is selected when the IsNewPregDefaults business rule is active, the system will automatically select the Yes radio button in the Is this a new pregnancy Radio Button Group and disable the entire group. This is not dependent upon the WIC status for the current certification.

B.27.2.2 Non-breastfeeding (currently Pregnant)

If the Non-breastfeeding radio button is selected when the IsNewPregDefaults business rule is active and the participant is currently certified as Pregnant, the system will compare the current system date to the Expected Delivery Date on the previous certification to determine which radio button to default in the Is this a new pregnancy Radio Button Group.

- If the difference between the current system date and the Expected Delivery Date is 9 months or more, the system will default the Yes radio button and will disable the entire Is this a new pregnancy Radio Button Group.
- If the difference between the current system date and the Expected Delivery Date is less than 9 months, the system will not default either radio button in the Is this a new pregnancy Radio Button Group and will leave the group enabled to allow the user to make their selection.

B.27.2.3 Non-breastfeeding (currently Non-breastfeeding)

If the Non-breastfeeding radio button is selected when the IsNewPregDefaults business rule is active and the participant is currently certified as Non-breastfeeding, the system will automatically default the Yes radio button in the Is this a new pregnancy Radio Button Group and will disable the entire Is this a new pregnancy Radio Button Group.

B.27.2.4 Non-breastfeeding (currently Breastfeeding)

If the Non-breastfeeding radio button is selected when the IsNewPregDefaults business rule is active and the participant is currently certified as Breastfeeding, the system will compare the current system date to the Actual Delivery Date on the previous certification to determine which radio button to default in the Is this a new pregnancy Radio Button Group.

- If the difference between the current system date and the Actual Delivery Date is more than 6 months, the system will default the Yes radio button but will leave the group enabled to allow the user to make their selection.
- If the difference between the current system date and the Actual Delivery Date is 6 months or less, the system will not default either radio button in the Is this a new pregnancy Radio Button Group and will leave the group enabled to allow the user to make their selection.

B.27.2.5 Breastfeeding (currently Pregnant)

If the Breastfeeding radio button is selected when the IsNewPregDefaults business rule is active and the participant is currently certified as Pregnant, the system will compare the current system date to the Expected Delivery Date on the previous certification to determine which radio button to default in the Is this a new pregnancy Radio Button Group.

- If the difference between the current system date and the Expected Delivery Date is more than 15 months, the system will default the Yes radio button and will disable the entire Is this a new pregnancy Radio Button Group.
- If the difference between the current system date and the Expected Delivery Date is 15 months or less, the system will not default either radio button in the Is this a new pregnancy Radio Button Group and will leave the group enabled to allow the user to make their selection.

B.27.2.6 Breastfeeding (currently Breastfeeding)

If the Breastfeeding radio button is selected when the IsNewPregDefaults business rule is active and the participant is currently certified as Breastfeeding, the system will compare the current system date to the Actual Delivery Date on the previous certification to determine which radio button to default in the Is this a new pregnancy Radio Button Group.

- If the difference between the current system date and the Actual Delivery Date is more than 12 months, the system will default the Yes radio button and will disable the entire Is this a new pregnancy Radio Button Group.
- If the difference between the current system date and the Actual Delivery Date is 12 months or less, the system will not default either radio button in the Is this a new pregnancy Radio Button Group and will leave the group enabled to allow the user to make their selection.

B.27.2.7 Breastfeeding (currently Non-breastfeeding)

If the Breastfeeding radio button is selected when the IsNewPregDefaults business rule is active and the participant is currently certified as Non-breastfeeding, the system will compare the current system date to the Actual Delivery Date on the previous certification to determine which radio button to default in the Is this a new pregnancy Radio Button Group.

- If the difference between the current system date and the Actual Delivery Date is more than 12 months, the system will default the Yes radio button and will disable the entire Is this a new pregnancy Radio Button Group.
- If the difference between the current system date and the Actual Delivery Date is 12 months or less, the system will not default either radio button in the Is this a new pregnancy Radio Button Group and will leave the group enabled to allow the user to make their selection.

This business rule allows SPIRIT to indicate whether the Certification WIC Status dialog should use the new default logic as described above, or initially default the WIC status to Pregnant and assumes this is a new pregnancy.

Business Rule: Use New Pregnancy Defaults (ISNEWPREGDEFAULTS)

DFDD Section: Clinic, Chapter 10 - Certification Guided Script

Values Allowed

Value	Result
Y	Use the new refined defaults on the Certification WIC Status dialog
N	Use the original defaults on the Certification WIC Status dialog

Current Values

State	Value
SPIRIT	Y

B.28 Minimum Number of Checks Required for Satellite Check Out

When a clinic checks data out to a satellite server they must also check out enough check serial numbers to service the number of participants that are expected to visit the satellite site. Checking out the check serial numbers prevents the same numbers from being used by the main clinic site by mistake.

This business rule would be used to indicate the minimum number of check serial numbers that must be checked out to a satellite server to assure it has enough to service the expected caseload.

Business Rule: Minimum Number of Checks Required for Satellite Check Out
(MINCHECKSFORCHECKOUT)

DFDD Section: Application Administration, Chapter 01 - System Administration

Current Values

State	Value
SPIRIT	1

B.29 Bank Account Number for WIC Checks

The MICR line of each WIC check must include the bank account number or the WIC bank will not accept the check. This is called the On Us section of the MICR line. When the system prints a WIC check on a MICR-compatible laser printer, it automatically includes the account number for the WIC bank within the MICR line of the check.

This business rule allows SPIRIT to indicate the bank account number for their WIC checks.

Business Rule: WIC Bank Account Number (ONUS)

DFDD Section: Clinic, Chapter 11 - Food Instrument Production

Values Allowed

Value	Result
00000001 through 99999999	WIC bank account number

Current Values

State	Value
SPIRIT	

Note: The Bank Account number will need to be provided for each Tribal Agency.

B.30 User Passwords Expire after 90 Days

Each clinic user is given their own username and password for the WIC Clinic application. The password should contain a combination of letters and numbers to prevent unauthorized access by other individuals. To help assure the security of these passwords, the WIC system can automatically require the users to change their password every 90 days.

This business rule allows SPIRIT to indicate whether the WIC system will automatically require the users to change their password every 90 days.

Business Rule: User Passwords Expire after 90 Days (PASSWORDEXPIRES)

DFDD Section: Application Administration, Chapter 02 - Security

Values Allowed

Value	Result
Y	System automatically require users to change their password every 90 days
N	System allows the users to keep their original password indefinitely

Current Values

State	Value
SPIRIT	Y

B.31 Maximum Number of Referral Contacts per Contact Date

The Add Referral Contact Information dialog allows the clinic user to add a referral contact for the participant. A new contact record is required for each agency that the participant received a referral.

This business rule allows SPIRIT to indicate the maximum number of referral contacts that can be recorded for a participant on a single contact date.

Business Rule: Maximum Number of Referral Contacts per Date
(REFERRALSPERDAY)

DFDD Section: Common Interface Panels, Chapter M - Referrals

Values Allowed

Value	Result
001 through 999	Maximum number of referral contacts allowed for a participant on a single contact date

Current Values

State	Value
SPIRIT	999

B.32 Allow Deletion of Nutrition Education Contacts

The Nutrition Education panel allows the user to view previous nutrition education contacts with the participant and add additional contacts if necessary. The Delete Contact button allows the user to delete an education contact that was recorded on the current system date.

This business rule allows SPIRIT to indicate that the Delete Contact button should be disabled so the user cannot delete any nutritional education contacts once they are created.

Business Rule: Allow Deletion of Nutrition Education Contacts (DeleteEdContact)

DFDD Section: Common Interface Panels, Chapter N - Nutrition Education and Goal Setting

Values Allowed

Value	Result
Y	Enable Delete Contact button
N	Disable Delete Contact button

Current Values

State	Value
SPIRIT	Y

B.33 Require Pump ID for Single-Use Breastpumps

The Issue Breastpump dialog allows the user to issue a breastpump to the current participant, along with breastfeeding kits and other breastfeeding supplies. The Breastpump Pump ID masked edit box on this dialog allows the user to enter the identification number for the breastpump that was issued to the participant. An entry is always required in this field if the breastpump is a multiple-use loaner.

This business rule allows SPIRIT to indicate that an entry is also required in Breastpump Pump ID masked edit box if the breastpump is a single-use type.

Business Rule: Require Pump ID for Single-Use Breastpumps
(SingleUsePumpIDRequired)

DFDD Section: Common Interface Panels, Chapter P - Breastpumps, Breastfeeding Kits and Supplies

Values Allowed

Value	Result
Y	Pump ID required for single-use breastpumps
N	Pump ID not required for single-use breastpumps

Current Values

State	Value
SPIRIT	Y

B.34 Automatically Reprint Stolen Checks

The Identify Stolen Checks dialog allows the clinic user to identify the WIC checks that were issued to the participant and then were stolen. After the clinic user confirms that the selected checks have been reported as stolen on the Confirm Checks to Mark as Stolen dialog, the WIC Clinic application can automatically reprint the stolen checks to allow the participant to receive their benefits.

This business rule allows SPIRIT to indicate whether the WIC Clinic application will automatically reprint checks that have been marked as stolen.

Business Rule: Automatically Reprint Stolen Checks (REPRINTSTOLEN)

DFDD Section: Clinic, Chapter 11 - Food Instrument Production

Values Allowed

Value	Result
Y	Automatically reprint checks that have been marked as stolen
N	Stolen checks are not automatically reprinted

Current Values

State	Value
SPIRIT	N

Note: SPIRIT had requested the ability to manually reprint checks. This can be accomplished by using the Add/Replace checks function.

B.35 Blood Work Required for All Certifications

The WIC Clinic application automatically requires that a new blood work contact be entered when a participant is certified through the Guided Script. A single blood work contact is usually only valid for one certification period. Other business rules described in this document can allow exceptions to this requirement.

This business rule allows SPIRIT to indicate that a blood work contact is required for every initial certification and subsequent certification of a participant, regardless of how the other business rules have been set. Only the Infant Certification Blood Work Requirement business rule is unaffected by this rule.

Business Rule: Blood Work Required for All Certifications (REQUIREBLOOD)

DFDD Section: Clinic, Chapter 10 - Certification Guided Script

Values Allowed

Value	Result
Y	A blood work contact is required for every initial and subsequent certification
N	Blood work requirements are governed by other business rules

Current Values

State	Value
SPIRIT	N

B.36 Blood Work Required for Certification (Not Physically Present)

The WIC Clinic application automatically requires that a new blood work contact be entered when a participant is certified through the Guided Script. The WIC regulations allow a participant to be certified without blood work if they were not physically present during the certification attempt.

This business rule allows the user to complete the certification process without blood work if “No” is selected for Physically Present.

Business Rule: Blood Required if Not Physically Present
(RequireBloodIfNotPhysicallyPresent)

DFDD Section: Clinic, Chapter 10 – Certification Guided Script

Values Allowed

Value	Result
Y	Require Blood to complete a certification even if the participant is not physically present
N	Do not require Blood to complete a certification if the participant is not physically present

Current Values

State	Value
SPIRIT	N

B.37 Verify Adjunctive Eligibility for Each Income Contact

The Income Calculator dialog in the WIC Clinic application allows the user to indicate that the participant is adjunctively eligible for WIC. Once the participant is adjunctively eligible, the Income Calculator dialog automatically defaults that information on all subsequent income contacts.

This business rule allows SPIRIT to indicate that the adjunctive eligibility should not automatically be selected on all subsequent income contacts. This means the clinic user must verify that the participant is adjunctively eligible for each income contact.

Business Rule: Reset Adjunctive Eligibility (RESETADJELIGIBILITY)

DFDD Section: Common Interface Panels, Chapter D - Income Calculator

Values Allowed

Value	Result
Y	Reset adjunctive eligibility information on each subsequent income contact
N	Copy adjunctive eligibility information to subsequent income contacts

Current Values

State	Value
SPIRIT	Y

B.38 Enable Copy Income Screening Contact

The Income Calculator dialog in the WIC Clinic application allows the user to record the income information for the current participant and to view the previous income contacts that were recorded for all members of the participant's household. The Copy Items to Current Income button allows the user to copy income information to the current participant from another member of their household.

This business rule allows SPIRIT to indicate that the users should be able to use the Copy Items to Current Income button on the Income Calculator dialog.

Business Rule: Enable Copy Income Screening Contact (EnableCopyIncome)

DFDD Section: Common Interface Panels, Chapter D - Income Calculator

Values Allowed

Value	Result
Y	Enable the Copy Items to Current Income button
N	Disable the Copy Items to Current Income button

Current Values

State	Value
SPIRIT	Y

B.39 Apply TANF Eligibility to Household

The Income Calculator dialog in the WIC Clinic application allows the user to indicate that the participant is adjunctively eligible for WIC because they already participate in the Temporary Assistance for Needy Families (TANF) program. Per WIC regulations when a participant is participating in TANF then all members of their household are adjunctively eligible for WIC.

This business rule allows SPIRIT to indicate that the TANF adjunctively eligibility for the participant should automatically apply to the income information for all of the members in the participant's household.

Business Rule: Apply TANF Eligibility to Household (HouseholdTANFEligibility)

DFDD Section: Common Interface Panels, Chapter D - Income Calculator

Values Allowed

Value	Result
Y	Apply participant's TANF eligibility to all members of their household
N	TANF eligibility only applies to the current participant

Current Values

State	Value
SPIRIT	Y

B.40 Default Dialog after Prescreening is Complete

The Applicant Prescreening dialog allows the clinic user to enter the information gathered during the prescreening of an applicant. When this screen is completed for the applicant and the user selects the OK button, the system will close the dialog and proceed in three different ways depending upon the selection made in the On Completion radio button group:

- If the Add Another Household Member radio button is selected in the On Completion radio button group, the system will return to the Applicant Prescreening dialog allow accept information for another household member
- If the Return to Participant List radio button is selected in the On Completion radio button group, the system will return to the currently selected view of the Participant List
- If the Open Participant Folder radio button is selected in the On Completion radio button group, the system will open the Participant Folder for the newly prescreened participant

This business rule allows SPIRIT to indicate which of these three options should be the default for the Applicant Prescreening dialog. The value of this rule indicates which radio button will be initially selected whenever the Applicant Prescreening dialog is first displayed, starting with zero (0) for the first radio button.

Business Rule: Default Dialog after Prescreening is Complete
(SCREENAFTERPRESCREEN)

DFDD Section: Clinic, Chapter 07 - Initial Contact

Values Allowed

Value	Result
0	Add Another Household Member radio button is the default
1	Return to Participant List radio button is the default
2	Open Participant Folder radio button is the default

Current Values

State	Value
SPIRIT	0

B.41 Show Risk Factor Codes

In the WIC Clinic application, the Risk Factors panel displays the current and past certifications for the participant. The description of the risk factors associated with each certification is also displayed.

This business rule allows SPIRIT to indicate that both the code and the description for each risk factor should be displayed on the Risk Factors panel.

Business Rule: Show Risk Factor Codes (SHOWRISKCODE)

DFDD Section: Common Interface Panels, Chapter K - Risk Factors and Clinic, Chapter 09 - Participant Folder

Values Allowed

Value	Result
Y	Display both the code and the description for risk factors
N	Display only the description for risk factors

Current Values

State	Value
SPIRIT	Y

B.42 Assign Risk Factors after Certification Completed

The WIC Clinic application automatically assigns Risk Factors during the certification attempt based upon the information entered for the participant. The application also allows the nutritionist (CPA) to manually assign risk factors based on their judgment.

This business rule allows SPIRIT to indicate that the WIC Clinic application should automatically assign Risk Factors based upon participant information that is entered after the participant has been certified.

Business Rule: Assign Risk Factors after Certification Completed
(AssignRisksOutsideCert)

DFDD Section: Common Interface Panels, Chapter A - Demographic Information Panels, Chapter G - Height Weight Bloodwork, and Chapter T - VENA

Values Allowed

Value	Result
Y	Automatically assign Risk Factors after the participant has been certified
N	Only automatically assign Risk Factors during the certification attempt

Current Values

State	Value
SPIRIT	Y

B.43 Show Termination Information on Participant List

After the clinic user performs a search for a participant, the WIC Clinic application displays all of the participants who meet the search criteria on the Participant List dialog. Selected information is displayed at the bottom of this dialog including the certification period for the participant.

This business rule allows SPIRIT to indicate that the termination date and termination reason should be included in the information displayed at the bottom of the Participant List dialog.

Business Rule: Show Termination Information (SHOWTERMINATIONINFO)

DFDD Section: Clinic, Chapter 06 - Search-Selection

Values Allowed

Value	Result
Y	Display termination date and reason on Participant List dialog
N	Termination date and reason are not displayed on Participant List dialog

Current Values

State	Value
SPIRIT	Y

B.44 Remove Subjective from SOAP Note Template

When the clinic first creates a new SOAP note for a participant the WIC Clinic application populates the note with the SOAP note template that contains the headers for the four (4) sections of the note: Subjective (S:), Objective (O:), Assessment (A:) and Plan (P:).

This business rule allows SPIRIT to indicate that the header for the Subjective section should not be included in the SOAP note template.

Business Rule: Remove Subjective from SOAP Note Template (NoSubjectiveInSOAP)

DFDD Section: Clinic, Chapter 09 - Participant Folder

Values Allowed

Value	Result
Y	Remove header for Subjective section from the SOAP note template
N	Include header for Subjective section in the SOAP note template

Current Values

State	Value
SPIRIT	N

B.45 Medical Information Included in SOAP Notes

When the clinic first creates a new SOAP note for a participant, the WIC Clinic application automatically populates the Objective section of the note with information from the participant folder. This information includes the risk factors from the current certification of the participant as well as the anthropometric and blood work information that was recorded when they were certified.

This business rule allows SPIRIT to indicate that the Objective section should include the anthropometric and blood work information from the most recent contacts that were added to the system, rather than the information that was recorded when the participant was certified.

Business Rule: SOAP Note Objective Data (SOAPNOTEDATA)

DFDD Section: Clinic, Chapter 09 - Participant Folder

Values Allowed

Value	Result
RECENT	Include anthropometric and blood work information from the most recent contacts
CERT	Include anthropometric and blood work information that was recorded when the participant was certified

Current Values

State	Value
SPIRIT	RECENT

B.46 Include Nutrition Education in SOAP Note

When the clinic creates a SOAP note for a participant the WIC Clinic application automatically populates the Objective section of the note with information from the participant folder.

This business rule allows SPIRIT to indicate that the Objective section should include the Goal Setting and Individual Primary nutrition education contacts that have been recorded during the current certification.

Business Rule: Include Nutrition Education in SOAP Note (AddEducationToSOAP)

DFDD Section: Clinic, Chapter 09 - Participant Folder

Values Allowed

Value	Result
Y	Include Goal Setting and Individual Primary nutrition education contacts
N	Do not include Goal Setting and Individual Primary nutrition education contacts

Current Values

State	Value
SPIRIT	Y

B.47 Include Default Analysis for Risk Factors in SOAP Note

When the clinic creates a SOAP note for a participant the WIC Clinic application automatically populates the Objective section of the note with information from the participant folder. This information includes the risk factors from the current certification of the participant.

SPIRIT can define a Default Assessment for each risk factor. The application can automatically populate the Assessment section of the SOAP note with the Default Assessment for each risk factor that was assigned to the current certification of the participant.

This business rule allows SPIRIT to indicate that the Assessment section should be populated with the Default Assessment for each risk factor that was assigned to the current certification of the participant.

Business Rule: Include Default Analysis for Risk Factors in SOAP Note
(AddAnalysisToSOAP)

DFDD Section: Clinic, Chapter 09 - Participant Folder

Values Allowed

Value	Result
Y	Include Default Assessment for risk factors
N	Do not include Default Assessment for risk factors

Current Values

State	Value
SPIRIT	Y

B.48 Include Default Plan for Risk Factors in SOAP Note

When the clinic creates a SOAP note for a participant the WIC Clinic application automatically populates the Objective section of the note with information from the participant folder. This information includes the risk factors from the current certification of the participant.

SPIRIT can define a Default Plan for each risk factor. The application can automatically populate the Plan section of the SOAP note with the Default Plan for each risk factor that was assigned to the current certification of the participant.

This business rule allows SPIRIT to indicate that the Plan section should be populated with the Default Plan for each risk factor that was assigned to the current certification of the participant.

Business Rule: Include Default Plan for Risk Factors in SOAP Note (AddPlanToSOAP)

DFDD Section: Clinic, Chapter 09 - Participant Folder

Values Allowed

Value	Result
Y	Include Default Plan for risk factors
N	Do not include Default Plan for risk factors

Current Values

State	Value
SPIRIT	Y

B.49 Transit Number for WIC Checks

The MICR line of each WIC check must include the transit number for the WIC bank or the bank will not accept the check. When the system prints a WIC check on a MICR-compatible laser printer, it automatically includes the transit number for the WIC bank within the MICR line of the check.

This business rule allows SPIRIT to indicate the transit number for their WIC checks.

Business Rule: WIC Bank Transit Number (TRANSIT)

DFDD Section: Clinic, Chapter 11 - Food Instrument Production

Values Allowed

Value	Result
00000001 through 99999999	WIC bank transit number

Current Values

State	Value
SPIRIT	

Note: This information will need to be provided by each tribal agency.

B.50 Retain Survey Question History

The Additional Info 1 sub-tab of the Demographics dialog in the WIC Clinic application allows the clinic user to record the participant's answers to survey questions defined by SPIRIT and the local agency. When SPIRIT or the local agency creates new survey questions, the WIC Clinic application can automatically discard the previously recorded answers or retain them for future reference.

SPIRIT has decided that the WIC Clinic application will not discard the previously recorded answers. Therefore this business rule will be set to Yes (Y) for SPIRIT.

Business Rule: Retain Survey Question History (RETAINSURVEYHISTORY)

DFDD Section: Common Interface Panels, Chapter A - Demographic Information Panels

Values Allowed

Value	Result
Y	Retain survey question history
N	Discard survey question history

Current Values

State	Value
SPIRIT	Y

B.51 Automatically Add Enhanced Breastfeeding Items

During the certification process, the WIC Clinic application automatically prompts the clinic user to create a food prescription for the participant. The food items that the system automatically adds to this food prescription are dependent upon the default food prescriptions that are associated with the certification risk factors.

This business rule allows SPIRIT to indicate that the system should also automatically add the enhanced breastfeeding food items to the participant's food prescription if they fit the proper qualifications.

Business Rule: Automatically Add Enhanced Breastfeeding Items
(AUTOADDEBFITEMS)

DFDD Section: Common Interface Panels, Chapter L - Food Prescription

Values Allowed

Value	Result
Y	Automatically add Enhanced Breastfeeding items
N	Enhanced Breastfeeding items are not automatically added

Current Values

State	Value
SPIRIT	Y

B.52 Include Summary Page in Ineligibility Summary Report

The Ineligibility Summary report lists applicants who were deemed ineligible for WIC services during a certification attempt, with subtotals for each Clinic selected for inclusion on the report.

This business rule allows SPIRIT to indicate that a final summary of the number of participants who are no longer eligible for benefits according to the filter criteria, broken down by ineligibility reason and WIC status, will be included on a separate page at the end of the report.

Business Rule: Include Summary Page in Ineligibility Summary Report
(SUMINELIGRPT)

DFDD Section: State Office, Chapter 09 - System Outputs

Values Allowed

Value	Result
Y	Include final summary page
N	Do not include final summary page

Current Values

State	Value
SPIRIT	Y

B.53 HBIG and Flu in Immunizations History

As the WIC clinics enter immunization history into the application, it is displayed in a grid on the Immunizations tab of the Participant Folder. The grid includes a row for each immunization series that has been defined in the system, even if a dose has not been recorded for the participant in the series.

This business rule allows SPIRIT to indicate that the grid should not display a row for the HBIG and Flu immunization series until a dose has been recorded in the series for the participant.

Business Rule: Hide HBIG and Flu in Immunizations History (HIDEHBIG_FLU)

DFDD Section: Common Interface Panels, Chapter I - Immunizations

Values Allowed

Value	Result
Y	HBIG and Flu in Immunizations History until a dose has been recorded
N	Always display HBIG and Flu in Immunizations History

Current Values

State	Value
SPIRIT	N

B.54 Work with On-site Group Display Option

The Work with On-site Group dialog allows the user to apply functions to a group of participants who are currently listed as on-site. There are two versions of the Work with On-site Group dialog: it can either display the name of the oldest household member who is currently listed as on-site, or it can either display the name of all participants within a household who are currently listed as on-site.

This business rule allows SPIRIT to indicate whether the Work with On-site Group dialog will display only the oldest household member or all participants within a household who are currently listed as on-site.

Business Rule: Work with On-site Group Display Option (WWOG-DISPLAY)

DFDD Section: Clinic, Chapter 06 - Search-Selection

Values Allowed

Value	Result
H	Display only the oldest household member Work with On-site Group
M	Display all household members Work with On-site Group

Current Values

State	Value
SPIRIT	M

B.55 Save Duplicate Demographic Information Option

When entering new applicants into the Clinic application, the system can automatically determine if there are potential duplicates that already exist within the system (see the Potential Duplicate Applicant/Participant business rule in this document).

If the user finds that the participant already exists in the system and is listed on the Potential Duplicate Applicant/Participant dialog, the user has the option to open the participant folder for this individual.

When the Address and Telephone information does not match between the existing participant and the new applicant, the system can give the user the choice to update the existing information in the database with the new Address and Telephone information.

This business rule allows SPIRIT to indicate that the user should be given the choice to update an existing participant's Address and Telephone information from the Applicant information.

Business Rule: Save Duplicate Demographic Information (SavDupDemographics)

DFDD Section: Clinic, Chapter 07 – Initial Contact

Values Allowed

Value	Result
Y	Update the Participant Address and Telephone information with the applicant information for the selected participant
N	Retain the existing Address and Telephone information for the selection participant

Current Values

State	Value
SPIRIT	Y

B.56 View Notes for Household Sort Order

The View Notes dialog of the Clinic application allows the user to view all of the notes for a particular participant. The notes are displayed sorted by the Create Date of the note.

This business rule allows SPIRIT to display the notes in either chronological or reverse chronological order.

Business Rule: View Notes for Household Sort Order (NoteSortOrder)

DFDD Section: Clinic, Chapter 09 – Participant Folder

Values Allowed

Value	Result
C	Notes will be sorted chronologically by the note Create Date
R	Notes will be sorted reverse chronologically by the note Create Date

Current Values

State	Value
SPIRIT	R

B.57 Capture Tribe on Race Ethnicity

The Race/Ethnicity dialog allows the user to select the Race and Ethnicity of the participant. SPIRIT would like the ability to also capture the Tribal Nation if the race selected is American Indian or Alaskan Native.

This business rule allows SPIRIT to indicate that the Race/Ethnicity dialog should also capture the Tribe information.

Business Rule: Capture Tribe on Race Ethnicity (CaptureTribe)

DFDD Section: Common Interface Panels, Chapter A – Demographic Information Panels

Values Allowed

Value	Result
Y	Tribe drop down list will be displayed and enabled if Race Ethnicity selected is American Indian or Alaskan Native.
N	Tribe drop down list will be disabled and hidden.

Current Values

State	Value
SPIRIT	Y

B.58 Prompt for Breastfeeding Note Template

The system allows the user to add a Breastfeeding Note for participants. There are situations where a template should be used and other times when the template is not needed.

This business rule allows SPIRIT to indicate whether the template should always be used or if the user should be prompted before the template is applied.

Business Rule: Prompt for Breastfeeding Note Template (PromptForBFNoteTemplate)

DFDD Section: Clinic, Chapter 09 – Participant Folder

Values Allowed

Value	Result
Y	Give user the option to apply the Breastfeeding Note Template.
N	Always use Breastfeeding Note Template

Current Values

State	Value
SPIRIT	Y

B.59 Protocols for Breastfeeding Peer Counselor Report

The Breastfeeding Peer Counselor Contacts report lists the Breastfeeding participants that have consulted with breastfeeding peer counselor and have a delivery date during the given date range. It includes the date of the contacts and where they fall within the established protocols.

The following business rules allow SPIRIT to define the three (3) contact protocols for the Breastfeeding Peer Counselor Contacts report. The protocols are the number of days after the actual delivery date of the Breastfeeding participant.

DFDD Section: Clinic, Chapter 05 - Breastfeeding Peer Counselor Reports; State Office, Chapter 05 - Breastfeeding Peer Counselor Reports

Values Allowed

Value	Result
0 – 99	Numbers of days after the actual delivery date

The business rule will be set to the listed value for SPIRIT:

Business Rule	SPIRIT
First protocol for Breastfeeding Peer Counselor Contacts report (BFCounselorContactProtocol1)	7
Second protocol for Breastfeeding Peer Counselor Contacts report (BFCounselorContactProtocol2)	14
Third protocol for Breastfeeding Peer Counselor Contacts report (BFCounselorContactProtocol3)	21

B.60 Gestational Diabetes Reminder

The system can automatically remind the user to document the results of the Gestational Diabetes test for a Pregnant woman if she has not been assigned the Gestational Diabetes risk factor and 28 weeks have passed since her LMP Start date.

This business rule allows SPIRIT to indicate if the CPA Review dialog will automatically display a message if a Pregnant woman is 28 weeks from LMP date and does not have the Gestational Diabetes risk factor assigned.

Business Rule: Gestational Diabetes Reminder (GestationDiabetesReminder)

DFDD Section: Clinic, Chapter 09 – Participant Folder

Values Allowed

Value	Result
Y	Display a “Document Results of Gestational Diabetes” in the CPA Review dialog for Pregnant women 28 weeks from LMP date that do not have the Gestational Diabetes risk factor assigned.
N	Will not display “Document Results of Gestational Diabetes” reminder in the CPA Review dialog

Current Values

State	Value
SPIRIT	Y

B.61 Require Hospital Discharge Date

The Health Information that is collected for postpartum women includes capturing the Hospital Discharge date. In some cases, this information may not be available and therefore should not be required.

This business rule allows SPIRIT to indicate if an entry is required in the Hospital Discharge date.

Business Rule: Hospital Discharge Date Required (HospitalDischargeDateRequired)

DFDD Section: Common Interface Panels, Chapter E - Health Information

Values Allowed

Value	Result
Y	Require an entry in the Hospital Discharge Date
N	Do not required an entry in the Hospital Discharge Date

Current Values

State	Value
SPIRIT	N

B.62 Limit Certification with Delayed Blood work

A participant can be certified for a limited time without their blood work results. The clinic user indicates this situation by recording a blood work contact and marking the Delayed Blood Work check box. The End of Day application can automatically terminate a participant when their blood work has not been recorded within a specific number of days.

This business rule allows SPIRIT to define the number of days that a participant can be certified without resolving their delayed blood work. After these days have past the system will automatically terminate the participant.

Business Rule: Certification Limit with Delayed Blood (CertLimitWithDelayedBlood)

DFDD Section: Application Administration, Chapter 03 – End of Day Processes

Values Allowed

Value	Result
##	Number of days a participant be certified without bloodwork

Current Values

State	Value
SPIRIT	90

B.63 Limit Certification with Pending Income Proof

A participant can be certified for a limited time without their proof of income. The End of Day application can automatically terminate a participant when their proof of income has not been recorded within a specific number of days.

This business rule allows SPIRIT to define the number of days that a participant can be certified without proof of income. After these days have past the system will automatically terminate the participant.

Business Rule: Certification Limit Pending Income Proof
(CertLimitWithPendingIncomeProof)

DFDD Section: Application Administration, Chapter 03 – End of Day Processes

Values Allowed

Value	Result
##	Number of days a participant be certified without proof of income

Current Values

State	Value
SPIRIT	30

B.64 Limit Certification with Pending Residency Proof

A participant can be certified for a limited time without their proof of residency. The End of Day application can automatically terminate a participant when their proof of residency has not been recorded within a specific number of days.

This business rule allows SPIRIT to define the number of days that a participant can be certified without proof of residency. After these days have past the system will automatically terminate the participant.

Business Rule: Certification Limit Pending Residency Proof
(CertLimitWithPendingResidencyProof)

DFDD Section: Application Administration, Chapter 03 – End of Day Processes

Values Allowed

Value	Result
##	Number of days a participant be certified without proof of residency

Current Values

State	Value
SPIRIT	30

B.65 Limit Certification with Pending ID Proof

A participant can be certified for a limited time without their proof of ID. The End of Day application can automatically terminate a participant when their proof of ID has not been recorded within a specific number of days.

This business rule allows SPIRIT to define the number of days that a participant can be certified without their proof of ID. After these days have past the system will automatically terminate the participant.

Business Rule: Certification Limit Pending ID Proof (CertLimitWithPendingIDProof)

DFDD Section: Application Administration, Chapter 03 – End of Day Processes

Values Allowed

Value	Result
##	Number of days a participant be certified without proof of ID

Current Values

State	Value
SPIRIT	30

B.66 Pending Income Proof – Key Value

When the clinic user records the income information for a participant on the Update Income Line Item dialog they must also indicate what proof of income the participant supplied by selecting an entry in the Proof of Income dropdown. A participant can be certified for a limited time without their proof of income. In this situation the clinic user can select the “Pending Proof” entry in the Proof of Income dropdown.

The End of Day application can automatically terminate a participant when their proof of income has not been recorded within a specific number of days (see the Limit Certification with Pending Income Proof business rule in this document). To identify these participants the End of Day application must find all income contacts where the “Pending Proof” entry was selected the Proof of Income dropdown. It must look for the key value of that entry instead of the description.

This business rule allows SPIRIT to identify the key value (ExternalID) of the “Pending Proof” entry in the Proof of Income dropdown.

Business Rule: Pending Income Proof (PendingIncomeProofValue)

DFDD Section: Application Administration, Chapter 03 – End of Day Processes

Values Allowed

Value	Result
?	“Pending Proof” value (External ID) for Proof of Income dropdown.

Current Values

State	Value
SPIRIT	H

B.67 Pending Residency Proof – Key Value

When the clinic user records the residency information for a participant on the Demographics Information panel they must also indicate what proof of residency the participant supplied by selecting an entry in the Residency Proof dropdown. A participant can be certified for a limited time without their proof of residency. In this situation the clinic user can select the “Pending Proof” entry in the Residency Proof dropdown.

The End of Day application can automatically terminate a participant when their proof of residency has not been recorded within a specific number of days (see the Limit Certification with Pending Residency Proof business rule in this document). To identify these participants the End of Day application must find all participants where the “Pending Proof” entry was selected the Residency Proof dropdown. It must look for the key value of that entry instead of the description.

This business rule allows SPIRIT to identify the key value (ExternalID) of the “Pending Proof” entry in the Residency Proof dropdown.

Business Rule: Pending Residency Proof (PendingResidencyProofValue)

DFDD Section: Application Administration, Chapter 03 – End of Day Processes

Values Allowed

Value	Result
?	“Pending Proof” value (External ID) for Residency Proof dropdown.

Current Values

State	Value
SPIRIT	D

B.68 Child Pending ID Proof – Key Value

When the clinic user records the demographic information for a participant on the Demographics Information panel they must also indicate what proof of ID the participant supplied by selecting an entry in the ID Proof dropdown. A participant can be certified for a limited time without their proof of ID. In this situation the clinic user can select the “Pending Proof” entry in the ID Proof dropdown.

The End of Day application can automatically terminate a participant when their proof of ID has not been recorded within a specific number of days (see the Limit Certification with Pending ID Proof business rule in this document). To identify these participants the End of Day application must find all participants where the “Pending Proof” entry was selected the ID Proof dropdown. It must look for the key value of that entry instead of the description.

This business rule allows SPIRIT to identify the key value (ExternalID) of the “Pending Proof” entry in the ID Proof dropdown for all Infants and Children. There is one list of ID proofs for Infants and Children, and another list for all women.

Business Rule: Pending ID Proof Child (PendingIDProofValueChild)

DFDD Section: Application Administration, Chapter 03 – End of Day Processes

Values Allowed

Value	Result
?	“Pending Proof” value (External ID) for ID Proof dropdown.

Current Values

State	Value
SPIRIT	I

B.69 Woman Pending ID Proof – Key Value

When the clinic user records the demographic information for a participant on the Demographics Information panel they must also indicate what proof of ID the participant supplied by selecting an entry in the ID Proof dropdown. A participant can be certified for a limited time without their proof of ID. In this situation the clinic user can select the “Pending Proof” entry in the ID Proof dropdown.

The End of Day application can automatically terminate a participant when their proof of ID has not been recorded within a specific number of days (see the Limit Certification with Pending ID Proof business rule in this document). To identify these participants the End of Day application must find all participants where the “Pending Proof” entry was selected the ID Proof dropdown. It must look for the key value of that entry instead of the description.

This business rule allows SPIRIT to identify the key value (ExternalID) of the “Pending Proof” entry in the ID Proof dropdown for all women. There is one list of ID proofs for Infants and Children, and another list for all women.

Business Rule: Pending ID Proof Woman (PendingIDProofValueWoman)

DFDD Section: Application Administration, Chapter 03 – End of Day Processes

Values Allowed

Value	Result
?	“Pending Proof” value (External ID) for ID Proof dropdown.

Current Values

State	Value
SPIRIT	A

B.70 Individual Nutrition Education Required

When issuing participant checks, the WIC Clinic application requires that the participant has received Individual Nutrition Education. This business rule allows the user to issue checks to a participant without requiring Individual Nutrition Education.

Business Rule: Individual Nutrition Education Required
(ChecksRequireIndividualNutEd)

DFDD Section: Clinic, Chapter 11 – Food Instrument Production

Values Allowed

Value	Result
Y	Require Individual Nutrition Education to issue checks
N	Individual Nutrition Education is not required to issue checks

Current Values

State	Value
SPIRIT	N

B.71 Height/Weight Required for Certification (Not Physically Present)

The system requires that a participant's height and weight measurements be recorded to complete the certification process. The WIC regulations allow a participant to be certified without height and weight measurements if they were not physically present during the certification attempt.

This business rule allows the user to complete the certification process without height and weight information if "No" is selected for Physically Present.

Business Rule: Height/Weight Required if Not Physically Present
(RequireHtWtIfNotPhysicallyPresent)

DFDD Section: Clinic, Chapter 10 – Certification Guided Script

Values Allowed

Value	Result
Y	Require Height/Weight to complete a certification even if the participant is not physically present
N	Do not require Height/Weight to complete a certification if the participant is not physically present

Current Values

State	Value
SPIRIT	N

B.72 Save Duplicate Demographics on Applicant Prescreening

When prescreening an applicant and if the business rule ShowDupParticipant is active, the system will show the potential duplicate participants. If a potential duplicate participant's folder is selected to be opened, the system will compare the address and telephone information of the applicant to the participant. If any of the following information is different, the system will display a message asking if the user would like the participant information updated with the new applicant information.

- Household.Address
- Household.CountyCd
- Household.LegalMunicipality
- Household.LocalMunicipality
- Household.StateCd
- Household.ZipCode
- Household.MailAddress
- Household.MailCity
- Household.MailState
- Household.MailZip
- Household.Telephone1
- Household.Comment1
- Household.Telephone2
- Household.Comment2

This business rule will provide the option of updating the participant address and telephone information with information from the applicant prescreening.

Business Rule: Save Duplicate Demographics (SavDupDemographics)

DFDD Section: Clinic, Chapter 7 – Initial Contact

Values Allowed

Value	Result
Y	Ask user if potential duplicate participant demographic information should be updated based on differences in demographic data of participant and applicant. Update if response is yes.
N	Do not ask user if potential duplicate participant demographic information should be updated even if there are differences in demographic data of participant and applicant.

Current Values

State	Value
SPIRIT	Y

B.73 Default Current Date for Vendor Complaints

When an individual reports a Vendor to SPIRIT WIC Program for what they believe is a violation, a Complaint is filed against the Vendor. The Complaints dialog allows SPIRIT to add a Complaint to the Vendor Folder.

This business rule allows SPIRIT to indicate that the system should automatically default the current system date in the Date of Complaint masked edit box on the Complaints dialog. SPIRIT has decided that the current system date should be the default. Therefore this business rule will be set to Yes (Y) for SPIRIT.

Business Rule: Default Current Date for Vendor Complaints
(VNDR_COMPLAINT_CURR_DATE)

DFDD Section: Vendor, Chapter 11 - Penalties Assessed

Values Allowed

Value	Result
Y	Default current system date for the Date of Complaint
N	Default nothing in the Date of Complaint

Current Values

State	Value
SPIRIT	Y

B.74 Include Inactive Stamps in Vendor Search

The Vendor Search dialog allows SPIRIT to search for vendors meeting the search criteria selected. The Vendor stamp number can be included as one of the items in the search criteria.

This business rule allows SPIRIT to indicate that the system should search both active and inactive stamps when a Vendor stamp number is included in the search criteria. SPIRIT has decided that inactive stamp numbers will be searched when a Vendor stamp number included in the search criteria. Therefore this business rule will be set to Yes (Y) for SPIRIT.

Business Rule: Include Inactive Stamps in Vendor Search
(VNDR_SEARCHINACTIVESTAMPS)

DFDD Section: Vendor, Chapter 06 - Vendor List and Vendor Search

Values Allowed

Value	Result
Y	Include active and inactive stamps in Vendor search
N	Include only active stamps in Vendor search

Current Values

State	Value
SPIRIT	Y

B.75 Use Previous Prices to Create New Vendor Price List

When a vendor applies for the WIC program there will be times throughout their contract that their food item pricing information must be updated. The New Price List dialog allows SPIRIT to create a new price list to record the information from the Vendor price survey.

This business rule allows SPIRIT to indicate that the New Price List dialog should include the Use Previous Prices check box. This check box allows the user to indicate that the prices from the previous price list should be automatically copied to the new price list. SPIRIT has decided that this check box will be available on the New Price List dialog. Therefore this business rule will be set to Yes (Y) for SPIRIT.

Business Rule: Enable Use Previous Prices Check Box (VNDR_USEPREVPRICES)

DFDD Section: Vendor, Chapter 28 - Food Price Tab

Values Allowed

Value	Result
Y	Enable Use Previous Prices check box on New Price List dialog
N	Disable Use Previous Prices check box on New Price List dialog

Current Values

State	Value
SPIRIT	Y

B.76 Redemption Change Report Limit

The Redemption Change Report identifies Vendors with unusual fluctuations in the amount of their WIC redemptions. Any Vendor with a fluctuation in either the number or the value of food instruments redeemed that exceeds the percentage limit defined by SPIRIT (higher or lower) will be listed on the report.

This business rule allows SPIRIT to define the percentage limit that a Vendor must exceed to be included on the Redemption Change Report.

Business Rule: Redemption Change Report Limit (VNDR_REDEMPCHANGE_LIMIT)

DFDD Section: Vendor, Chapter 19, Vendor Reports

Values Allowed

Value	Result
0	Vendors with any fluctuation are included on the report
1 – 100	Vendors that exceed this percentage limit are included on the report

Current Values

State	Value
SPIRIT	20

B.77 Small Volume Vendors Report Threshold

The Small Volume Vendors Report lists Vendors that had redemptions from fewer than the minimum number of different participants during the report month.

This business rule allows SPIRIT to define the minimum number of different participants for the Small Volume Vendors Report.

Business Rule: Small Volume Vendors Report Threshold
(VNDR_SMALLVOL_THRESHOLD)

DFDD Section: Vendor, Chapter 19, Vendor Reports

Values Allowed

Value	Result
1	Only Vendor without any redemptions are included on the report
2 – 100	Vendors with redemptions from fewer than the this number of different participants are included on the report

Current Values

State	Value
SPIRIT	25

B.78 Low Variance Vendor Summary - Redeemed Food Instruments Threshold

The Low Variance Vendor Summary identifies vendors who may be engaged in price fixing or have inadequate stock to allow normal brand selection by participants.

This business rule allows SPIRIT to define the minimum number of redeemed food instruments per food instrument type/vendor for the Low Variance Vendor Summary.

Business Rule: Low Variance Vendor Summary - Redeemed Food Instruments Threshold (VNDR_LOWVAR_MIN_NUM_FI)

DFDD Section: Vendor, Chapter 19, Vendor Reports

Values Allowed

Value	Result
1 - 999	Minimum number of redeemed food instruments for the Low Variance Vendor Summary

Current Values

State	Value
SPIRIT	1

B.79 Low Variance Vendor Summary – Redemption Price Percentage Threshold

The Low Variance Vendor Summary identifies vendors who may be engaged in price fixing or have inadequate stock to allow normal brand selection by participants.

This business rule allows SPIRIT to define the minimum percentage difference between the highest and lowest redemption prices of the selected food instruments per food instrument type/vendor for the Low Variance Vendor Summary.

Business Rule: Low Variance Vendor Summary - Redemption Price Percentage Threshold (VNDR_LOWVAR_HI_LOW_PRICE_DIFF)

DFDD Section: Vendor, Chapter 19, Vendor Reports

Values Allowed

Value	Result
1 - 100	Minimum percentage difference for the Low Variance Vendor Summary

Current Values

State	Value
SPIRIT	5

B.80 Include Redeemed Amount on Small Volume Vendors Report

The Small Volume Vendors Report lists Vendors that had redemptions from fewer than the minimum number of different participants during the report month. The number of participants and the number of food instruments redeemed by the vendor during the report month are included on the report for each qualifying Vendor.

This business rule allows SPIRIT to indicate that the total dollar value of the food instruments redeemed by the vendor during the report month should also be included on the Small Volume Vendors Report. SPIRIT has decided that this column will be included on the Small Volume Vendors Report therefore this business rule will be set to Yes (Y) for SPIRIT.

Business Rule: Include Redeemed Amount on Small Volume Vendors Report
 (VNDR_SMALLVOL_TOTALREDEEM)

DFDD Section: Vendor, Chapter 19 - Vendor Reports

Values Allowed

Value	Result
Y	Include total dollar value of the food instruments redeemed on report
N	Do not include total dollar value of the food instruments redeemed on report

Current Values

State	Value
SPIRIT	Y

B.81 Include Annual Training Roster Report

The Annual Training Roster report lists all active vendors who are due to attend annual training.

This business rule allows SPIRIT to control the generation of the Annual Training Roster report.

Business Rule: Include Annual Training Roster Report
(VNDR_RPT_ANNL_TRN_RSTR)

DFDD Section: Vendor, Chapter 19 – Vendor Reports

Values Allowed

Value	Result
Y	Allow SPIRIT to generate the Annual Training Roster Report.
N	Do not allow SPIRIT to generate the Annual Training Roster Report.

Current State Values

State	Value
SPIRIT	Y

B.82 Include Action Dates Report

The Action Dates report lists all Vendors that have events or follow up activities that have passed their action date based the current system date.

This business rule allows SPIRIT to control the generation of the Action Dates report.

Business Rule: Include Action Dates Report (VNDR_RPT_ACTION_DATES)

DFDD Section: Vendor, Chapter 19 – Vendor Reports

Values Allowed

Value	Result
Y	Allow SPIRIT to generate the Action Dates Report.
N	Do not allow SPIRIT to generate the Action Dates Report.

Current State Values

State	Value
SPIRIT	Y

B.83 Include Group Training

During their contract period a Vendor can be scheduled to attend a training session. These training sessions can be conducted one-on-one or in a group setting.

This business rule allows SPIRIT to control which of the Training events and follow up activities are available on the Vendor Events tab of the Vendor folder.

If the business rule is set to Yes (Y) then the Group Training events and follow up activities will be available for SPIRIT. If the business rule is set to No (N) then the individual Training events and follow up activities will be available for SPIRIT.

Business Rule: Include Group Training (VNDR_TRN_GRP_TRN)

DFDD Section: Vendor, Chapter 18 – Training

Values Allowed

Value	Result
Y	Allow use of Group Training Event and Follow-up Activities.
N	Do not allow use of Group Training Event and Follow-up Activities.

Current State Values

State	Value
SPIRIT	Y

B.84 Maximum Sanction Points before Disqualification

Sanction points can be assessed against a Vendor during their contract period due to violations of the WIC regulations.

This business rule defines the maximum number of sanction points that a Vendor can receive before they can be disqualified. If SPIRIT uses a formula to determine when a Vendor is disqualified (see the Vendor Business Rule USE_DISQUALIFICATION_FORMULA) then this value is used as part of the calculation for the disqualification for a Vendor.

Business Rule: Maximum Sanction Points before Disqualification
(MAX_SANCTION_POINTS)

DFDD Section: Vendor, Chapter 11 – Penalties Assessed

Values Allowed

Value	Result
1 - 999	Maximum sanction points allowed before Vendor disqualification

Current State Values

State	Value
SPIRIT	15

B.85 Peer Group Recalculations

The mass Peer Group Recalculation function will perform a price recalculation for all Peer Groups.

This business rule allows SPIRIT to indicate that mass Peer Group pricing recalculation is allowed.

Business Rule: Peer Group Recalculations (PEERGROUPRECALCULATIONS)

DFDD Section: Vendor, Chapter 08 – Manage Peer Groups

Values Allowed

Value	Result
Y	Allow mass Peer Group Recalculations.
N	Do not allow mass Peer Group Recalculations.

Current State Values

State	Value
SPIRIT	Y

B.86 Pending Disqualification Duration

A Vendor can be placed in a pending disqualification status before they are permanently disqualified.

This business rule sets the number of days that a Vendor can remain in a pending disqualification status. If the value of this business rule is greater than zero then SPIRIT allows a Vendor to be placed in a pending disqualification status.

Business Rule: Pending Disqualification Duration (PENDINGDISQUALIFICATION)

DFDD Section: Vendor, Chapter 11 – Penalties Assessed

Values Allowed

Value	Result
0	Pending Disqualification process is not used.
1 – 999	Pending Disqualification is used and number of days prior to a vendor being disqualified.

Current State Values

State	Value
SPIRIT	15

B.87 End of Day Import of Bank Paid File

The Bank Paid data file contains the paid information for all checks/food instruments that were presented to the bank for redemption. The Bank sends this file to the WIC system for the reconciliation of the food instruments.

This business rule allows SPIRIT to indicate that the End of Day Process will automatically import the Bank Paid data file.

Business Rule: End of Day Import of Bank Paid File
(EOD_BANKINGPAIDFILEIMPORT)

DFDD Section: Application Administration, Chapter 05 - Banking Files (ASCII) (EOD)

Values Allowed

Value	Result
Y	Automatically import the Bank Paid file during the End of Day process
N	Do not import the Bank Paid file during the End of Day process

Current State Values

State	Value
SPIRIT	Y

B.88 End of Day Export of Bank Price File

The Bank Price file contains the pricing of the food instruments for each of the Vendor peer groups. The Bank uses the information in this file to set its maximum prices.

This business rule allows SPIRIT to indicate that the End of Day Process will automatically export the Bank Price data file.

Business Rule: End of Day Export of Bank Price File
(EOD_BANKINGPRICEFILEEXPORT)

DFDD Section: Application Administration, Chapter 05 - Banking Files (ASCII) (EOD)

Values Allowed

Value	Result
Y	Automatically export the Bank Price file during the End of Day process
N	Do not export the Bank Price file during the End of Day process

Current State Values

State	Value
SPIRIT	Y

B.89 End of Day Export of Bank Stamp File

The Bank Stamp data file contains the vendor stamp information for each of the vendors in SPIRIT system. The Bank uses the information in this file to determine which vendor stamps are valid.

This business rule allows SPIRIT to indicate that the End of Day Process will automatically export the Bank Stamp data file.

Business Rule: End of Day Export of Bank Stamp File
(EOD_BANKINGSTAMPFILEEXPORT)

DFDD Section: Application Administration, Chapter 05 - Banking Files (ASCII) (EOD)

Values Allowed

Value	Result
Y	Automatically export the Bank Stamp file during the End of Day process
N	Do not export the Bank Stamp file during the End of Day process

Current State Values

State	Value
SPIRIT	Y

B.90 End of Day Export of Bank Vendor File

The Bank Vendor data file contains the information that the Bank requires for each of the vendors. The Bank uses the information in this file to determine the peer group for each vendor.

This business rule allows SPIRIT to indicate that the End of Day Process will automatically export the Bank Vendor data file.

Business Rule: End of Day Export of Bank Vendor File
(EOD_BANKINGVENDORFILEEXPORT)

DFDD Section: Application Administration, Chapter 05 - Banking Files (ASCII) (EOD)

Values Allowed

Value	Result
Y	Automatically export the Bank Vendor file during the End of Day process
N	Do not export the Bank Vendor file during the End of Day process

Current State Values

State	Value
SPIRIT	Y

B.91 End of Day Export of Bank Issuance File

The Bank Issuance data file contains the information that the Bank requires for each of the checks that were issued to the WIC participants. The Bank can use the information in this file to reconcile their redemption information against the WIC issuance information.

This business rule allows SPIRIT to indicate that the End of Day Process will automatically export the Bank Issuance data file.

Business Rule: End of Day Export of Bank Issuance File
(EOD_BANKINGISSUANCEFILEEXPORT)

DFDD Section: Application Administration, Chapter 03 - End of Day Processes

Values Allowed

Value	Result
Y	Automatically export the Bank Issuance file during the End of Day process
N	Do not export the Bank Issuance file during the End of Day process

Current State Values

State	Value
SPIRIT	Y

B.92 End of Day Export of Bank Stop Payment File

The Bank Stop Payment data file contains the information that the Bank requires for each of the checks that were issued to the WIC participants and should not be paid.

This business rule allows SPIRIT to indicate that the End of Day Process will automatically export the Bank Stop Payment data file.

Business Rule: End of Day Export of Bank Stop Payment File
(EOD_BANKINGSTOPPAYFILEEXPORT)

DFDD Section: Application Administration, Chapter 03 - End of Day Processes

Values Allowed

Value	Result
Y	Automatically export the Bank Stop Payment file during the End of Day process
N	Do not export the Bank Stop Payment file during the End of Day process

Current State Values

State	Value
SPIRIT	Y

B.93 End of Day Export of Dual Participation File

The Dual Participation data file contains the information that an external system requires to perform its dual participation checking. The file contains participant demographic and redemption information.

This business rule allows SPIRIT to indicate that the End of Day Process will automatically export the Dual Participation data file and transfer it to an external system.

SPIRIT will be sending its participant information to the State of Oklahoma for their dual participation checking process. Therefore this business rule will be set to Yes (Y) for SPIRIT.

Business Rule: End of Day Export of Dual Participation File
(EOD_EXTERNALDUALPARTICIPATION)

DFDD Section: Application Administration, Chapter 03 - End of Day Processes

Values Allowed

Value	Result
Y	Automatically export the Dual Participation file during the End of Day process
N	Do not export the Dual Participation file during the End of Day process

Current State Values

State	Value
SPIRIT	Y

B.94 End of Day Pending Vendor Disqualification

SPIRIT can enter a future date in the disqualification date for a Vendor. The Pending Disqualification function in the End of Day process will automatically disqualify the Vendor on that date. This business rule allows SPIRIT to indicate that the End of Day Process will run the Pending Disqualification function.

Business Rule: End of Day Pending Vendor Disqualification
(EOD_PROCESSPENDINGDISQUALIFICATION)

DFDD Section: Application Administration, Chapter 03 – End of Day Processes

Values Allowed

Value	Result
Y	Run the Pending Vendor Disqualification function during the End of Day process.
N	Do not run the Pending Vendor Disqualification function during the End of Day process.

Current State Values

State	Value
SPIRIT	Y

B.95 End of Day Sanction Points Process

Violation sanction points are applied against a Vendor for a specified period of time (number of days). When the time period has expired the sanction points can be removed automatically from the Vendor history. This business rule allows SPIRIT to indicate that the End of Day Process will run the function that automatically remove all expired sanction points.

Business Rule: End of Day Sanction Points Process
(EOD_PROCESSSANCTIONPOINTS)

DFDD Section: Application Administration, Chapter 03 – End of Day Processes

Values Allowed

Value	Result
Y	Run the Sanction Points Process during the End of Day process.
N	Do not run the Sanction Points Process during the End of Day process.

Current State Values

State	Value
SPIRIT	Y

B.96 Use Disqualification Formula

This business rule allows SPIRIT to indicate that a specific formula is used to determine when a Vendor is disqualified. This rule works in conjunction with the MAX_SANCTION_POINTS business rule that was described earlier in this document.

Business Rule: Use Disqualification Formula (USE_DISQUALIFICATION_FORMULA)

DFDD Section: Vendor, Chapter 11 – Penalties Assessed

Values Allowed

Value	Result
Y	Disqualification formula is used to disqualify vendors
N	Disqualification formula is not used to disqualify vendors

Current State Values

State	Value
SPIRIT	Y

B.97 Census Tract

Along with the Vendor address, the Vendor application can also record the Census Tract of the Vendor on the Page 1 sub-tab of the Demographics tab in the Vendor folder.

This business rule allows SPIRIT to indicate if the Census Tract will be enabled in the Vendor application.

Business Rule: Census Tract (CENSUSTRACT)

DFDD Section: Vendor, Chapter 7 – Vendor Folder

Values Allowed

Value	Result
Y	Enable Census Tract feature.
N	Disable Census Tract feature.

Current State Values

State	Value
SPIRIT	N

B.98 Compliance Buys

The Vendor application provides an optional feature for producing Compliance Buy checks that can be used to determine Vendor compliance with WIC regulations. The checks are identical to WIC participant checks but are redeemed by investigative staff.

This business rule allows SPIRIT to indicate if the Compliance Buy feature will be enabled in the Vendor application.

Business Rule: Compliance Buys (EVNT_FLLUP_CMPL_BUY)

DFDD Section: Vendor, Chapter 16 - Compliance Buys

Values Allowed

Value	Result
Y	Enable Compliance Buys feature.
N	Disable Compliance Buys feature.

Current State Values

State	Value
SPIRIT	Y

B.99 Compliance Buy List of Checks

The Vendor application provides an optional feature for recording Compliance Buy checks that were not produced by the application.

This business rule allows SPIRIT to indicate that the Compliance Buy List Check feature will be enabled in the Vendor application.

Business Rule: Compliance Buy List of Checks (EVNT_FLLUP_CMPL_BUY_LIST)

DFDD Section: Vendor, Chapter 16 - Compliance Buys

Values Allowed

Value	Result
Y	Enable Compliance Buy List of Checks feature.
N	Disable Compliance Buy List of Checks feature.

Current State Values

State	Value
SPIRIT	Y

B.100 Compliance Buy Check Returned to State

The Vendor application provides an optional feature for recording information regarding how the Vendor accepted a compliance buy check. This information is used to determine when Violations and/or Sanctions should be issued against the Vendor.

This business rule allows SPIRIT to indicate that the Compliance Buy Check Returned feature will be enabled in the Vendor application.

Business Rule: Compliance Buy Check Returned
(EVNT_FLLUP_CMPL_BUY_RETURNED)

DFDD Section: Vendor, Chapter 16 - Compliance Buys

Values Allowed

Value	Result
Y	Enable Compliance Buy Check Returned feature.
N	Disable Compliance Buy Check Returned feature.

Current State Values

State	Value
SPIRIT	Y

B.101 Vendor Probation

There are occasions when a vendor might have problems keeping in compliance with the WIC regulations. In these cases the Vendor application provides an optional feature for placing a vendor on probation in order to observe the vendor activities a little closer. This allows SPIRIT to flag the vendor for further monitoring until they are back in compliance with the WIC regulations.

This business rule allows SPIRIT to indicate that the Probation feature will be enabled in the Vendor application.

Business Rule: Vendor Probation (EVNT_FLLUP_PRBTN)

DFDD Section: Vendor, Chapter 05 - Probation

Values Allowed

Value	Result
Y	Enable Probation feature.
N	Disable Probation feature.

Current State Values

State	Value
SPIRIT	Y

B.102 Vendor Reinstate

The Vendor application provides an optional feature for reinstating a vendor that has been put on probation and restores them to an enrolled status.

This business rule allows SPIRIT to indicate that the Reinstate feature will be enabled in the Vendor application.

Business Rule: Vendor Reinstate (EVNT_FLLUP_REINSTATE)

DFDD Section: Vendor, Chapter 06 - Reinstate

Values Allowed

Value	Result
Y	Enable Reinstate feature.
N	Disable Reinstate feature.

Current State Values

State	Value
SPIRIT	Y

B.103 Vendor Stamp - Returned

The Vendor application provides an optional feature for SPIRIT to record the receipt of a returned stamp from a vendor.

This business rule allows SPIRIT to indicate that the Stamp Returned feature will be enabled in the Vendor application.

Business Rule: Vendor Stamp Returned (EVNT_FLLUP_STMP_RTRN)

DFDD Section: Vendor, Chapter 11 - Penalties Assessed

Values Allowed

Value	Result
Y	Enable Stamp Returned feature.
N	Disable Stamp Returned feature.

Current State Values

State	Value
SPIRIT	Y

B.104 Terminate Stamp

The Vendor application provides an optional feature for terminating a stamp number that was issued to a vendor. There are situations when a vendor may have more than one stamp issued and active at the same time. Then it may become necessary to terminate a vendor stamp but keep the vendor active.

This business rule allows SPIRIT to indicate that the Terminate Stamp feature will be enabled in the Vendor application.

Business Rule: Terminate Stamp (EVNT_TERM_STMP)

DFDD Section: Vendor, Chapter 12 – Vendor Stamp

Values Allowed

Value	Result
Y	Enable Terminate Stamp feature.
N	Disable Terminate Stamp feature.

Current State Values

State	Value
SPIRIT	Y

B.105 Log an Application as Incomplete

When a Vendor returns a completed application to SPIRIT it can be logged into the Vendor application. There are two options available to log the receipt of the application. The standard Log Application dialog provides for entry of an Application Returned Undeliverable Reason. The optional feature available on the Log Application dialog provides for entry of an Application Incomplete Reason in place of the Application Returned Undeliverable Reason.

This business rule allows SPIRIT to indicate that the Log Application as Incomplete feature will be enabled in the Vendor application.

Business Rule: Log Application Incomplete (LOGAPPINCOMPLETE)

DFDD Section: Vendor, Chapter 03 - Entry of New Applicants

Values Allowed

Value	Result
Y	Enable Log Application Incomplete feature.
N	Disable Log Application Incomplete feature.

Current State Values

State	Value
SPIRIT	Y

B.106 Vendor Stamp – More than One Stamp Number

The Vendor application allows the issuance of a stamp number to each Vendor. The application provides an optional feature to allow the issuance of more than one stamp number to a Vendor.

This business rule allows SPIRIT to indicate that a Vendor can be issued more than one stamp number.

Business Rule: More than One Vendor Stamp Number
(MORETHAN1VENSTAMPNBR)

DFDD Section: Vendor, Chapter 12 - Vendor Stamp

Values Allowed

Value	Result
Y	Allow issuance of multiple stamp numbers to a Vendor
N	Allow issuance of only one stamp number to a Vendor

Current State Values

State	Value
SPIRIT	N

B.107 Pharmacy Wholesaler

The Vendor application can record a Grocery Wholesaler and a Milk Wholesaler for each Vendor. The application provides an optional feature to eliminate the Milk Wholesaler and in its place record a Pharmacy Wholesaler.

This business rule allows SPIRIT to indicate that the Pharmacy Wholesaler should be used in place of the Milk Wholesaler.

Business Rule: Pharmacy Wholesaler (PHARMACYWHOLEALER)

DFDD Section: Vendor, Chapter 04 - Vendor Folder

Values Allowed

Value	Result
Y	Replace Milk Wholesaler with Pharmacy Wholesaler
N	Do not use Pharmacy Wholesaler feature.

Current State Values

State	Value
SPIRIT	Y

B.108 Vendor Stamp Number Length

The Vendor application requires SPIRIT to specify the length of the Vendor stamp number.

This business rule indicates the Vendor stamp number length.

Business Rule: Stamp Number Length (STAMPNUMBERLENGTH)

DFDD Section: Vendor, Chapter 12 - Vendor Stamp

Values Allowed

Value	Result
1 – 7	Length of Vendor Stamp Number

Current State Values

State	Value
SPIRIT	4

B.109 Vendor Stamp Number – Numeric Only

The Vendor application requires SPIRIT to specify if the Vendor stamp number can only contain numbers, or the stamp number can include alphabetic characters as well as numbers.

This business rule indicates if the Vendor stamp number may only contain numbers.

Business Rule: Stamp Number Numeric (STAMPNUMBERNUMERIC)

DFDD Section: Vendor, Chapter 12 - Vendor Stamp

Values Allowed

Value	Result
Y	Stamp number contains only numbers.
N	Stamp number contains numbers and alphabetic characters.

Current State Values

State	Value
SPIRIT	Y

B.110 Vendor ID – Numeric Only

The Vendor application requires SPIRIT to specify if the Vendor ID can only contain numbers, or the ID can include alphabetic characters as well as numbers.

This business rule indicates if the Vendor ID may only contain numbers.

Business Rule: Vendor ID Numeric Only (VENDORID_NUMERIC)

DFDD Section: Vendor, Chapter 03 - Entry of New Applicants

Values Allowed

Value	Result
Y	Vendor ID contains only numbers.
N	Vendor ID contains numbers and alphabetic characters.

Current State Values

State	Value
SPIRIT	Y

B.111 Vendor ID – State Assigned

The Vendor application requires SPIRIT to specify if the Vendor ID will automatically be assigned by the system or SPIRIT will manually assign the Vendor ID.

This business rule indicates if SPIRIT will manually assign the Vendor ID.

Business Rule: Vendor ID State/District Assigned (VENDORID_STATE_ASSIGNED)

DFDD Section: Vendor, Chapter 03 - Entry of New Applicants

Values Allowed

Value	Result
Y	SPIRIT manually assigns vendor ID.
N	Vendor ID is automatically assigned by the system.

Current State Values

State	Value
SPIRIT	Y

B.112 Vendor ID Length

The Vendor application requires SPIRIT to specify the length of the Vendor ID.

This business rule indicates the Vendor ID length.

Business Rule: Vendor ID Length (VENDORIDLENGTH)

DFDD Section: Vendor, Chapter 03 - Entry of New Applicants

Values Allowed

Value	Result
1 – 6	Length of Vendor ID

Current State Values

State	Value
SPIRIT	4

B.113 Food Instruments Redeemed within 85% of the Maximum Allowed Report

The Vendor application includes the Food Instruments Redeemed within 85% of the Maximum Allowed Report that lists all vendors with one or more redeemed food instruments where the paid amount is equal to or greater than 85% of the maximum price allowed for that food instrument type.

This business rule allows SPIRIT to indicate that the Food Instruments Redeemed within 85% of the Maximum Allowed Report will be available in the Vendor application.

Business Rule: Food Instruments Redeemed within 85% of the Maximum Allowed Report (VNDR_RPT_FI_RDMD_GE_85_PCT_MAX_PRICE)

DFDD Section: Vendor, Chapter 19 - Vendor Reports

Values Allowed

Value	Result
Y	Enable Food Instruments Redeemed within 85% of the Maximum Allowed Report.
N	Disable Food Instruments Redeemed within 85% of the Maximum Allowed Report.

Current State Values

State	Value
SPIRIT	Y

B.114 Food Instruments Redeemed within \$5.00 of the Maximum Allowed Report

The Vendor application includes the Food Instruments Redeemed within \$5.00 of the Maximum Allowed Report that lists all vendors with one or more redeemed food instruments where the paid amount is within \$5.00 of the maximum price allowed for that food instrument type.

This business rule allows SPIRIT to indicate that the Food Instruments Redeemed within \$5.00 of the Maximum Allowed Report will be available in the Vendor application.

Business Rule: Food Instruments Redeemed within \$5.00 of the Maximum Allowed Report (VNDR_RPT_FI_RDMD_WTHN_5_DLRS_MAX_PRICE)

DFDD Section: Vendor, Chapter 19 - Vendor Reports

Values Allowed

Value	Result
Y	Enable Food Instruments Redeemed within \$5.00 of the Maximum Allowed Report.
N	Disable Food Instruments Redeemed within \$5.00 of the Maximum Allowed Report.

Current State Values

State	Value
SPIRIT	Y

B.115 Vendor Summary Detail

The Vendor application includes the Vendor Summary By Vendor and Vendor Summary By Peer Group reports that summarizes the food instruments redeemed during the selected month.

This business rule allows SPIRIT to indicate that these two Vendor summary detail reports will be available in the Vendor application.

Business Rule: Vendor Summary Detail (VNDR_RPT_VNDR_SMMRY_DTL)

DFDD Section: Vendor, Chapter 19 - Vendor Reports

Values Allowed

Value	Result
Y	Enable Vendor Summary Detail Reports.
N	Disable Vendor Summary Detail Reports.

Current State Values

State	Value
SPIRIT	Y

B.116 Save Electronic Copy of Vendor Letters

The Vendor Management system automatically generates letters and allows the user to print letters on demand. The system can automatically save an electronic copy of each generated letter.

This business rule allows SPIRIT to indicate that the system should automatically save an electronic copy of each Vendor letter that is generated.

Business Rule: Save Electronic Copy of Vendor Letters (SaveVendorLetters)

DFDD Section: Vendor, Chapter 20 - Vendor Form Letters

Values Allowed

Value	Result
Y	Automatically save an electronic copy of each Vendor letter
N	Do not save an electronic copy of each Vendor letter

Current State Values

State	Value
SPIRIT	Y

B.117 Special Vendor Training

SPIRIT can require that a Vendor attend special training other than the standard Orientation, New Vendor and Annual training. The Special Training dialog allows the user to record when the special training is scheduled and the type of special training.

This business rule allows SPIRIT to indicate if the Special Training dialog will be available in the Vendor application.

Business Rule: Special Training (VNDR_TRN_SPECIAL)

DFDD Section: Vendor, Chapter 18 – Training

Values Allowed

Value	Result
Y	Enable Special Training dialog.
N	Disable Special Training dialog.

Current State Values

State	Value
SPIRIT	Y

B.118 Include Complaint Type Description on Vendor Profile Report

This business rule allows SPIRIT to indicate that the description of the type of complaint that was recorded for the Vendor should be included in the Event / Follow-up Activity information on the Vendor Profile Report.

Business Rule: Include Complaint Type Description on Vendor Profile Report
(VEN_PROF_RPT_INCL_EVNT_FA_TYPE)

DFDD Section: Vendor, Chapter 19 - Vendor Reports

Values Allowed

Value	Result
Y	Include complaint type description
N	Do not include complaint type description

Current State Values

State	Value
SPIRIT	Y

B.119 Maintain Milk Wholesaler

The Maintain Milk Wholesalers dialog of the Reference Utility application allows the user to update the milk wholesalers defined in the database.

This business rule allows SPIRIT to indicate if the Maintain Milk Wholesalers dialog will be available in Reference Utility application.

Business Rule: Maintain Milk Wholesaler (SYS_ADMIN_MNTN_MILK_WHLSLR)

DFDD Section: Application Administration, Chapter 09- Reference Utility

Values Allowed

Value	Result
Y	Enable Maintain Milk Wholesaler dialog.
N	Disable Maintain Milk Wholesaler dialog.

Current State Values

State	Value
SPIRIT	N

B.120 Maintain Peer Groups

The Peer Group Management menu item of the Vendor Management application allows the user to maintain peer group information.

This business rule allows SPIRIT to indicate if the Peer Group Management menu item will be available in the Vendor Management application.

Business Rule: Maintain Peer Groups (VENDOR_MNTN_PEER_GROUPS)

DFDD Section: Vendor, Chapter 08 – Manage Peer Group

Values Allowed

Value	Result
Y	Enable Peer Group List dialog.
N	Disable Peer Group List dialog.

Current State Values

State	Value
SPIRIT	Y

B.121 Maintain Pharmacy Wholesaler

The Maintain Pharmacy Wholesalers dialog of the Reference Utility application allows the user to update the pharmacy wholesalers defined in the database.

This business rule allows SPIRIT to indicate if the Maintain Pharmacy Wholesalers dialog will be available in the Reference Utility application.

Business Rule: Maintain Pharmacy Wholesaler
(SYS_ADMIN_MNTN_PHRMY_WHLSLR)

DFDD Section: Application Administration, Chapter 09- Reference Utility

Values Allowed

Value	Result
Y	Enable Maintain Pharmacy Wholesaler dialog.
N	Disable Maintain Pharmacy Wholesaler dialog.

Current State Values

State	Value
SPIRIT	Y

B.122 Reinstate Vendor Stamp

When a Vendor has been reinstated, the Vendor Stamp also needs to be reinstated at the same time.

This business rule allows the user to reinstate the Vendor stamp at the time of adding the Reinstate follow-up activity for a Vendor.

Business Rule: Reinstate Vendor Stamp (ReinstateVendorStamp)

DFDD Vendor, Chapter 06 - Reinstate

Values Allowed

Value	Result
Y	Enable Reinstate Vendor Stamp check box on Reinstate dialog
N	Disable Reinstate Vendor Stamp check box on Reinstate dialog

Current State Values

State	Value
SPIRIT	Y

B.123 New Vendor Monitoring Description

The system provides an Event and Follow-up activity to allow the user to add a New Vendor Monitoring Visit to a Vendor. This monitoring visit can also be considered their authorization visit.

This business rule allows name of this Event and Follow-up activity to be displayed as “Vendor Authorization Visit”.

Business Rule: New Vendor Monitoring Description (VendorMonitoringDesc)

DFDD Vendor, Chapter 14 – Vendor Monitoring

Values Allowed

Value	Result
Y	Display New Vendor Monitoring Event and Follow-up activity description as “Vendor Authorization Visit”
N	Display New Vendor Monitoring Event and Follow-up activity description as “New Vendor Monitoring”

Current State Values

State	Value
SPIRIT	Y

B.124 Interactive Training Enabled

The system provides an Event and Follow-up activity to allow the user to add Interactive Training Scheduled and Interactive Training Attended to a Vendor.

This business rule allows this Event and Follow-up activity to be displayed and enabled as “Interactive Training”.

Business Rule: Interactive Training Enabled (InteractiveTrainingEnabled)

DFDD Vendor, Chapter 18 – Vendor Training

Values Allowed

Value	Result
Y	Display and enable Interactive Training Event and Follow-up activity
N	Interactive training will be hidden

Current State Values

State	Value
SPIRIT	Y

B.125 Annual Training Enabled

The system provides an Event and Follow-up activity to allow the user to add Annual Training Scheduled and Annual Training Attended to a Vendor.

This business rule allows this Event and Follow-up activity to be displayed and enabled as “Annual Training”.

Business Rule: Annual Training Enabled (AnnualTrainingEnabled)

DFDD Vendor, Chapter 18 – Vendor Training

Values Allowed

Value	Result
Y	Display and enable Annual Training Event and Follow-up activity
N	Annual training will be hidden

Current State Values

State	Value
SPIRIT	Y

B.126 New Vendor Training Enabled

The system provides an Event and Follow-up activity to allow the user to add New Vendor Training Scheduled and New Vendor Training Attended to a Vendor.

This business rule allows the Event and Follow-up activity to be displayed and enabled as “New Vendor Training”.

Business Rule: New Vendor Training Enabled (NewVendorTrainingEnabled)

DFDD Vendor, Chapter 18 – Vendor Training

Values Allowed

Value	Result
Y	Display and enable New Vendor Training Event and Follow-up activity
N	New Vendor training will be hidden

Current State Values

State	Value
SPIRIT	Y

B.127 Shared Local Clinics

The system allows the user to associate a Vendor with one or more shared local clinics or local agencies. This business rule indicates whether the system will list local clinics or local agencies.

Business Rule: Shared Local Clinics (SharedLocalClinics)

DFDD Vendor, Chapter 04 – Vendor Folder and Chapter 09 - Application Wizard

Values Allowed

Value	Result
Y	Display the list as Shared Local Clinics
N	Display the list as Shared Local Agencies

Current State Values

State	Value
SPIRIT	Y

B.128 Include Terminated Vendor on Vendor Listing Reports

The system allows the user to generate a Vendor Listing report sorted by Vendor ID or by Vendor Name.

This business rule allows the user the option to include Terminated Vendors within these reports.

Business Rule: Included Terminated Vendors on Listing Reports
(IncludeTermVendorOnList)

DFDD Vendor, Chapter 19 – Vendor Reports

Values Allowed

Value	Result
Y	Display and enable “Include Terminated Vendors” check box on Generate Vendor Listing Report dialogs
N	Hide “Include Terminated Vendors” check box on Generate Vendor Listing Report dialogs.

Current State Values

State	Value
SPIRIT	Y

B.129 Display Refer to Breastfeeding Peer Counselor

When the VENA panel is displayed, the checkbox to display “Refer to Breastfeeding Peer Counselor” may or may not be included in the panel.

This business rule allows SPIRIT to display or not display the check box and associated text for “Refer to Breastfeeding Peer Counselor”

Business Rule: Display “Refer to Breastfeeding Peer Counselor”
(DspReferToBFPeerCounselor)

DFDD Section: Clinic, Chapter 10 – Certification Guided Script, VENA.

Common Interface Panels, Chapter T – VENA

Values Allowed

Value	Result
Y	Enable the display of “Refer to Breastfeeding Peer Counselor”
N	Disable the display of “Refer to Breastfeeding Peer Counselor”

Current Values

State	Value
SPIRIT	N