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## 4. System Outputs

### 4.1 Reports Selection

This is the dialog for choosing reports to print. This dialog can be accessed from the System Outputs toolbar button. Please note that not all outputs can be accessed from this location. In those instances the access location will be described along with the dialog description.

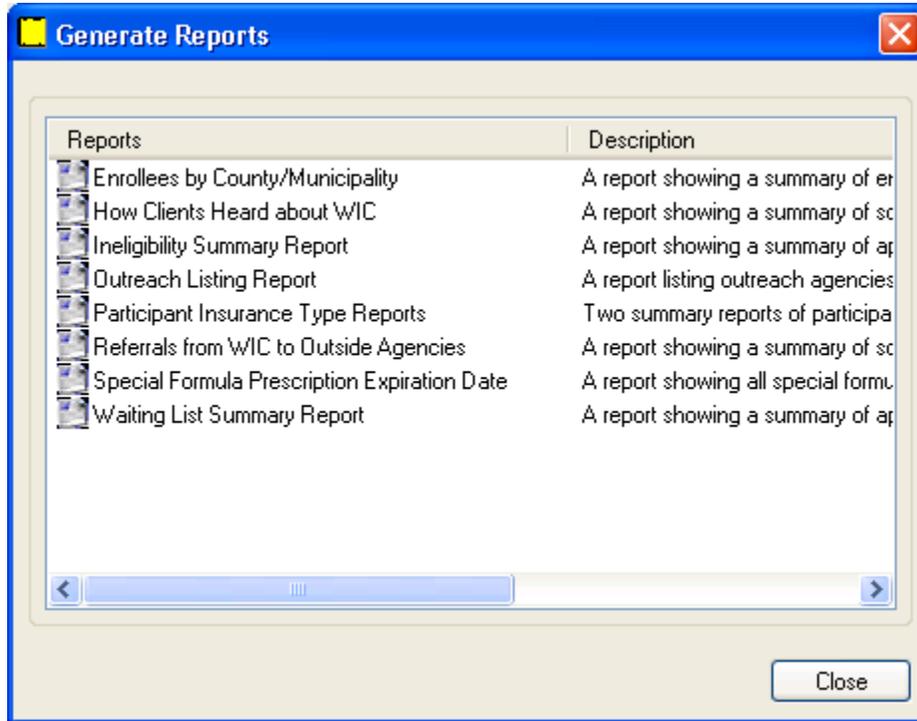


Figure 1 – Generate Reports Dialog

#### 4.1.1 Controls

This section describes the behavior of the controls on the Generate Reports dialog.

##### 4.1.1.1 Reports Display List

This control allows the user to view the list of available reports. The display list will be enabled when the Generate Reports dialog is active. It will be filled with entries for all available reports. Each entry displays as a small icon and a text label that displays to the right of the icon in the Report column. Additional information is provided for each entry in the Description column. The entries are arranged vertically, each on its own line with information arranged in columns.

#### *4.1.1.2 Enrollees by County/Municipality List Item*

Upon selection of the Enrollees by County/Municipality list item, the system will invoke the Generate Enrollees by County/Municipality dialog described in this document. The list item will be enabled when the Generate Reports dialog is active. It does not have a mnemonic or a caption.

#### *4.1.1.3 Referrals from WIC to Outside Agencies List Item*

Upon selection of the Referrals from WIC to Outside Agencies list item, the system will invoke the Generate Referrals from WIC to Outside Agencies dialog described in this document. The list item will be enabled when the Generate Reports dialog is active. It does not have a mnemonic or a caption.

#### *4.1.1.4 How Clients Heard about WIC List Item*

Upon selection of the How Clients Heard about WIC list item, the system will invoke the Generate How Clients Heard about WIC dialog described in this document. The list item will be enabled when the Generate Reports dialog is active. It does not have a mnemonic or a caption.

#### *4.1.1.5 Waiting List Summary Report List Item*

Upon selection of the Waiting List Summary Report list item, the system will invoke the Generate Waiting List Summary Report described in this document. The list item will be enabled when the Generate Reports dialog is active. It does not have a mnemonic or a caption.

#### *4.1.1.6 Ineligibility Summary Report List Item*

Upon selection of the Ineligibility Summary Report list item, the system will invoke the Generate Ineligibility Summary Report dialog described in this document. The list item will be enabled when the Generate Reports dialog is active. It does not have a mnemonic or a caption.

#### *4.1.1.7 Special Formula Prescription Expiration Report List Item*

Upon selection of the Special Formula Prescription Expiration Report list item, the system will invoke the Generate Special Formula Prescription Expiration Report dialog described in this document. The list item will be enabled when the Generate Reports dialog is active. It does not have a mnemonic or a caption.

#### ***4.1.1.8 Participant Insurance Type Reports List Item***

Upon selection of the Participant Insurance Type Reports list item, the system will invoke the Generate Participant Insurance Type Reports dialog described in this document. The list item will be enabled when the Generate Reports dialog is active. It does not have a mnemonic or a caption.

#### ***4.1.1.9 Outreach Listing Report List Item***

Upon selection of the Outreach Listing Report list item, the system will display the Generate Outreach Listing Report dialog described in this document.

#### ***4.1.1.10 Close Button***

This control allows the user to exit the Generate Reports dialog. The Close button will be enabled when the Generate Report dialog is active. Characteristics for the Close button are defined in *Consistencies*.

## 4.2 Generate Enrollees by County/Municipality Report Dialog

This dialog will allow the user to generate a report of enrollees by county. It is invoked when the user selects the Enrollees by County/Municipality option on the System Outputs, Generate Reports dialog.

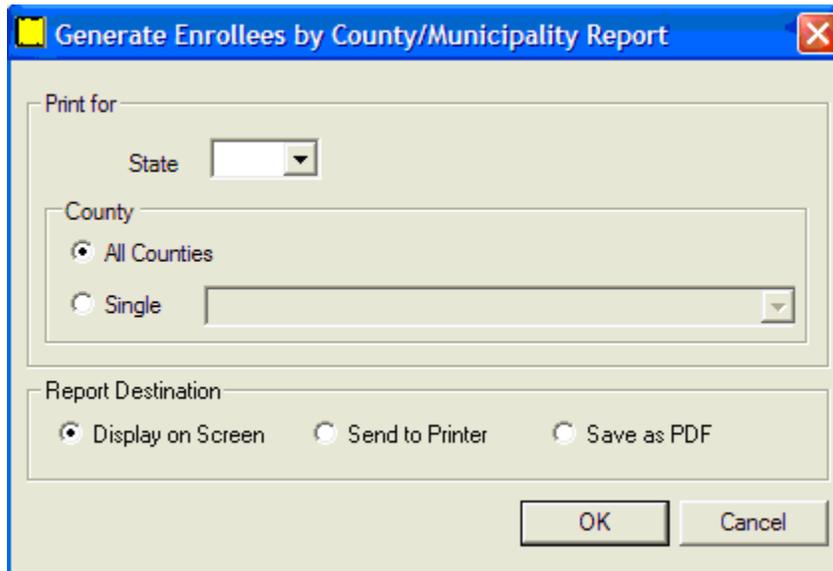


Figure 2 – Generate Enrollees by County/Municipality Report Dialog

### 4.2.1 Controls

#### 4.2.1.1 State dropdown list

This control will allow the user to specify the specific state to include on the report. The list of states will be obtained from lookup database. It will be enabled when the Generate Enrollees by County/Municipality Report dialog is active.

#### 4.2.1.2 All Counties/Municipalities option button

This control option button allows the user to indicate whether the report will include participants from all counties or a single specific county. The radio button group will be enabled when the Generate Enrollees by County/Municipality Report dialog is active and an entry is selected in the State dropdown. It consists of the following radio buttons:

- All Counties
- Single

The All Counties radio button will initially be selected.

#### 4.2.1.3 County dropdown list

This control will allow the user to specify the specific county for which he wishes a report. The list of counties will be obtained from lookup database. This dropdown list will contain all the counties and municipalities known to the system. It is initially disabled and is only enabled when the Single option button is true.

#### 4.2.1.4 Report Destination Radio Button Group

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the Generate Enrollees by County/Municipality Report dialog is enabled. It will default to Display on Screen.

#### 4.2.1.5 OK Button

This control will run any validations, generate the report, and exit the dialog. The OK button will be enabled when the Generate Enrollees by County/Municipality Report dialog is active (See *Saving the Data* in the Processing section below.). Characteristics for the OK button are defined in *Consistencies*.

#### 4.2.1.6 Cancel Button

This control will allow the user to exit the dialog without generating a report. The Cancel button will be enabled when the Generate Enrollees by County/Municipality Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 4.2.2 Processes

#### 4.2.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to “Generate Enrollees by County/Municipality Dialog”

#### 4.2.2.2 Edits

Upon selection of the OK button:

- If an entry is not selected in the State dropdown, the system will invoke a standard error message with the text “An entry is required in the {name of control}.”

- If the Single option button is selected, the user must make a selection from the County dropdown list. If an entry is not selected in the control, the system will invoke a standard error message with the text of “Select a County or the All Counties option.”

#### ***4.2.2.3 Generate Enrollees by County/Municipality Report***

Upon successful completion of the edits listed above, the system will generate the Enrollees by County/Municipality report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see System Tools).
- If Report Destination is PDF, the system will invoke the “Save As” dialog. The user may select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

### 4.3 Enrollees by County/Municipality Report (Output) CAS001

This report will allow the user to print, by municipality, a summary report of the enrollment totals.

Enrollees by County/Municipality Report		
● CAS001	Enrollees by County/Municipality	07/12/2000 ●
● <REPORT HEADER>		12:30:00 ●
● <STAFF MEMBER>		Page 1 ●
	ALLEN, IN	
● Municipality		Count
● -----	-----	-----
● AUBURN		11,543
● BUTLER		13,546
● -----		-----
● Total for County		25,089
● <<page break after county>>		

#### 4.3.1 Data Elements

##### 4.3.1.1 Report Title

The title of the report will be the text of “Enrollees by County/Municipality”. A subtitle will indicate the county and state for which the page is reporting.

##### 4.3.1.1.1 Origin of Data Element

The county name will be obtained from the lookup database.

##### 4.3.1.1.2 Format

The value will appear as its literal value.

##### 4.3.1.2 Municipality Name

This value will be the name of the municipality within the county.

#### 4.3.1.2.1 Origin of Data Element

These elements will be taken from the lookup database.

#### 4.3.1.2.2 Format

The value will appear as its literal value.

#### 4.3.1.3 Count

This value will be calculated by summing the number of enrollees for a municipality within the county.

##### 4.3.1.3.1 Origin of Data Element

The calculation will be based on the Legal-Municipality attribute of the HOUSEHOLD entity in conjunction with the Household-ID of the MEMBER entity.

##### 4.3.1.3.2 Format

The value will appear in the format #,###.

### 4.3.2 Filter Criteria

#### 4.3.2.1 State

The report will only include enrollees where the Household.State value matches the state selected by the user.

#### 4.3.2.2 County

The report will only include enrollees where the Household.County value matches the county selected by the user. If all counties are selected, all counties within the selected state will be included in the report.

### 4.3.3 Sort Order

#### 4.3.3.1 County

The report will be sorted by county.

#### 4.3.3.2 Municipality code

The report will be sorted by municipality within county.

### **4.3.4 Control Breaks**

#### *4.3.4.1 County*

On a change of county, a sum of the number of participants (enrollees) will be printed and a page break will occur.

### **4.3.5 Grand Total**

No grand total is indicated for this report.

#### 4.4 Generate Referrals from WIC to Outside Agencies Report Dialog

This dialog will allow the user to generate a report on referrals from WIC to external agencies. This dialog is invoked when the user selects the Referrals Summary option on the System Outputs, Generate Reports dialog.

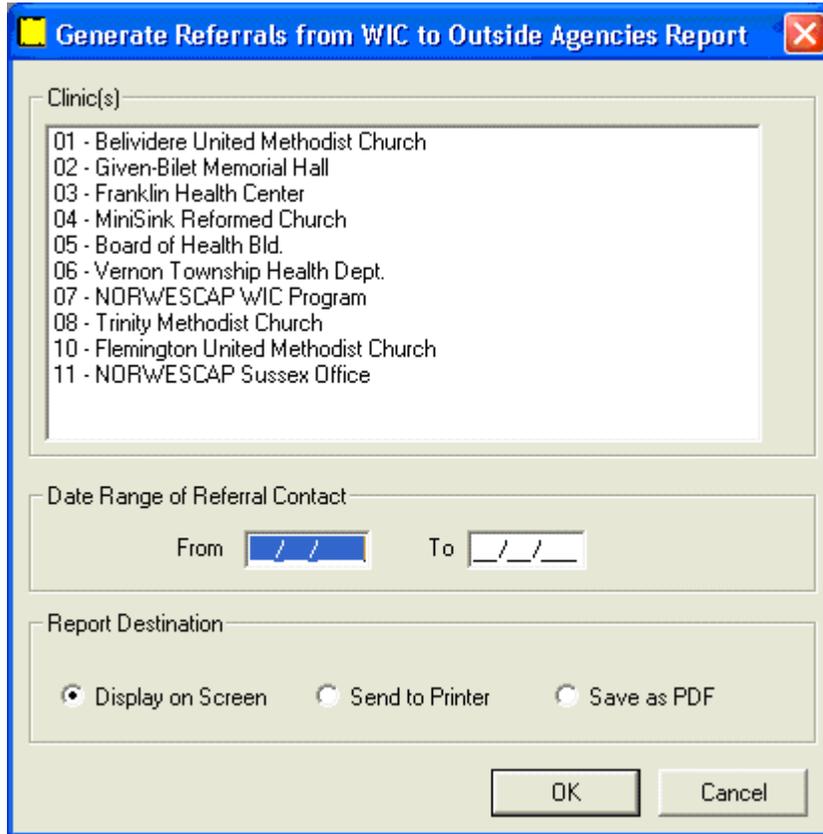


Figure 3 – Generate Referrals from WIC to Outside Agencies Report Dialog

## 4.4.1 Controls

### 4.4.1.1 Clinic List Box

The clinic list box allows the user to select from a list of clinic names. The control will be enabled when the Generate Referrals from WIC to Outside Agencies Report dialog is active. The clinic list will be filled with entries for each clinic defined in the clinic entity that belongs to the clinic database. The entries will appear in numerical order by Clinic ID. No clinics will be highlighted initially. Multiple selection will be supported.

### 4.4.1.2 Date Range From Masked Edit Box (from)

This control will allow the user to specify the start date of the date range on which to filter the Referrals from WIC to Outside Agencies report. The masked edit box will be enabled when the Generate Referrals from WIC to Outside Agencies Report dialog is active. The mask on the box will be “####/####/#####” to accept a date with a four digit year. The masked edit box will initially be blank.

### 4.4.1.3 Date Range To Masked Edit Box (to)

This control will allow the user to specify the end date of the date range on which to filter the Referrals from WIC to Outside Agencies report. The masked edit box will be enabled when the Generate Referrals from WIC to Outside Agencies Report dialog is active. The mask on the box will be “####/####/#####” to accept a date with a four digit year. The masked edit box will initially be blank. The string entered must represent a valid date in the format of MM/DD/CCYY.

### 4.4.1.4 Report Destination Radio Button Group

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the Generate Referrals from WIC to Outside Agencies Report dialog is active. It will default to Display on Screen.

### 4.4.1.5 OK Button

This control will allow the user to instruct the system to edit the values of the controls on the form, generate the report, and exit the dialog. The OK button will be enabled when the Generate Referrals from WIC to Outside Agencies Report dialog is active (See *Saving the Data* in the Processing section below.). Characteristics for the OK button are defined in *Consistencies*.

#### 4.4.1.6 Cancel Button

This control will allow the user to exit the dialog without generating a report. The Cancel button will be enabled when the Generate Referrals from WIC to Outside Agencies Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 4.4.2 Processes

#### 4.4.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to “Generate Referrals from WIC to Outside Agencies Report”
- All Clinics will be displayed in the Clinic(s) list box in numeric order by Clinic ID and no clinic is initially selected
- The Date Range From masked edit box will be initially blank.
- The Date Range To masked edit box will be initially blank.

#### 4.4.2.2 Edits

Upon selection of the OK button:

- If at least one selection is not made in the Clinic(s) list box, the system will invoke a standard error message with the text “A selection is required in the {name of control}.”
- If an entry is not made in the Date Range From masked edit box, the system will invoke a standard error message with the text “An entry is required for the {name of control}.”
- The date entered in the Date Range From masked edit box must be equal to or less than the current system date or the system will invoke a standard error message with the text “Date entered must be less than or equal to today’s date.”
- The date entered in the Date Range From masked edit box must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text “Invalid date entered.”
- If an entry is not made in the Date Range To masked edit box, the system will invoke a standard error message with the text “An entry is required for the {name of control}.”
- The date entered in the Date Range To masked edit box must be equal to or less than the current system date or the system will invoke a standard error message with the text “Date entered must be less than or equal to today’s date.”
- The date entered in the Date Range To masked edit box must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text “Invalid date entered.”

- The Date Range From masked edit box value must be equal to or less than the value of the Date Range To masked edit box. If the Date Range From masked edit box value is not equal to or less than the Date Range To masked edit box value, the system will invoke a standard error message with the text “Beginning of date range must be equal to or less than end of date range.”

#### *4.4.2.3 Generate Referrals from WIC to Outside Agencies Report*

Upon successful completion of the edits listed above, the system will generate the Referrals from WIC to Outside Agencies report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see System Tools).
- If Report Destination is PDF, the system will invoke the “Save As” dialog. The user may select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

### 4.5 Referrals from WIC to Outside Agencies Report (Output) CAS002

This report will allow the user to print a summary report of referral sources as to whom the participant was referred for services.

Referrals from WIC to Outside Agencies Report				
CAS002	Referrals from WIC to Outside Agencies		07/12/2000	
<REPORT HEADER>	01/15/2000 - 02/15/2000		12:30:00	
<STAFF MEMBER>			Page 1	
Clinic: Neighborhood Health Clinics, Inc.				
Referral Date	Referred Agency	Referral Level	Quantity	
01/30/2000	Food Stamps	State	9	
	Maternal and Child Health	State	35	
	Utilities Assistance	Local	98	
			-----	
			142	
02/03/2000	Maternal and Child Health	State	12	
	Utilities Assistance	Local	104	
			-----	
			116	
Total for Clinic: Neighborhood Health Clinics, Inc.			258	
<<page break before next clinic for state report>>				
<<repeat clinic for next site in sorted order>>				
Total for Report			258	

#### 4.5.1 Data Elements

##### 4.5.1.1 Report Title

The title of the report will be the text of “Referrals from WIC to Outside Agencies”. A subtitle will indicate the date range selected for the report.

##### 4.5.1.1.1 Origin of Data Element

The report date will be selected by the user on the Referrals from WIC to Outside Agencies dialog described in this document.

##### 4.5.1.1.2 Format

The date values will appear in MM/DD/CCYY format.

#### ***4.5.1.2 Clinic Name***

This value will be the name of the clinic the report is detailing.

##### ***4.5.1.2.1 Origin of Data Element***

The value will be taken from the Service-Site-Name attribute of the SERVICE-SITE entity.

##### ***4.5.1.2.2 Format***

The value will appear as its literal value.

#### ***4.5.1.3 Clinic Name***

This value will be one of the clinics the user selected on the Referrals from WIC to Outside Agencies Report dialog described in this document.

##### ***4.5.1.3.1 Origin of Data Element***

The value will be taken from the Service-Site-ID attribute and Service-Site-Name attribute of the SERVICE-SITE entity for the clinic the user selected.

##### ***4.5.1.3.2 Format***

The value will appear as its literal value.

#### ***4.5.1.4 Referral Date***

Each referral date will have its own section and total.

##### ***4.5.1.4.1 Origin of Data Element***

The value will be taken from the Contact-Date attribute of the REF-CONTACT entity.

##### ***4.5.1.4.2 Format***

The value will appear in MM/DD/CCYY format.

#### ***4.5.1.5 Referred Agencies***

This value will be the name of the state agencies that have been referred.

##### ***4.5.1.5.1 Origin of Data Element***

The value will be taken from the State-Local-Identifier attribute of the REF-CONTACT entity. Only state agencies will be listed.

#### 4.5.1.5.2 Format

The value will appear in its literal format.

#### 4.5.1.6 Count

This value will be a calculated from the number of referrals.

##### 4.5.1.6.1 Origin of Data Element

The value will be taken from the record count where the Ref-Agency and State-Local and Contact-Date attributes of the REF-CONTACT entity are matching.

##### 4.5.1.6.2 Format

The value will appear in #,### format.

### 4.5.2 Filter Criteria

#### 4.5.2.1 Clinic Selection

The selection criteria will allow for selection of clinics to limit the report to only participants designated for those sites. Multiple selection will be supported.

#### 4.5.2.2 Date Range of Referral Contact

The selection criteria will allow for entry of a beginning and ending range of dates. These will be used to limit the referral items to those where the referral contact date falls between the user entered beginning and ending date.

### 4.5.3 Sort Order

#### 4.5.3.1 Clinic

The report will be sorted by clinic.

#### 4.5.3.2 Referral Date

The report will be sorted by referral date within clinic.

#### 4.5.3.3 Referred Agency Name

The report will be sorted by referral name within referral date also within clinic.

## **4.5.4 Control Break**

### *4.5.4.1 Clinic*

On a change of clinic, a sum of the referrals for that site will be printed and a page break will occur.

### *4.5.4.2 Referral Date*

On a change of referral date, a sum of the referrals for that date will be printed and a multiple line break will occur.

## **4.5.5 Grand Total**

### *4.5.5.1 Count of Referrals*

A final summary count of the number of referrals according to the filter criteria will be included at the end of the report.

#### 4.6 Generate How Clients Heard about WIC Report Dialog

This dialog will allow the user to generate a report on how clients heard about WIC. This dialog is invoked when the user selects the How Clients Heard about WIC option on the System Outputs, Generate Reports dialog.

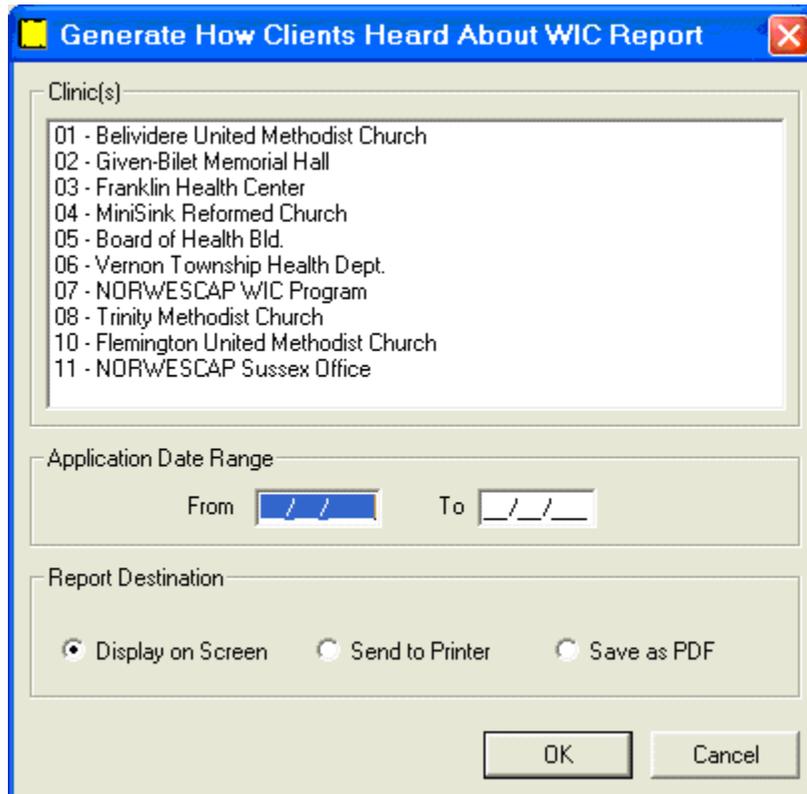


Figure 4 – Generate How Clients Heard about WIC Report Dialog

## 4.6.1 Controls

### 4.6.1.1 Clinic List Box

The clinic list box allows the user to select from a list of clinic names. The control will be enabled when the Generate How Clients Heard about WIC Report dialog is active. The clinic list will be filled with entries for each clinic defined in the clinic entity that belongs to the clinic database. The entries will appear in numerical order by Clinic ID. No clinics will be highlighted initially.

### 4.6.1.2 Date Range From Masked Edit Box (from)

This control will allow the user to specify the start date of the date range on which to filter the How Clients Heard about WIC report. The masked edit box will be enabled when the Generate How Clients Heard about WIC Report dialog is active. The mask on the box will be “###/###/####” to accept a date with a four digit year. The masked edit box will initially be blank.

### 4.6.1.3 Date Range To Masked Edit Box (to)

This control will allow the user to specify the end date of the date range on which to filter the How Clients Heard about WIC report. The masked edit box will be enabled when the Generate How Clients Heard about WIC Report dialog is active. The mask on the box will be “###/###/####” to accept a date with a four digit year. The masked edit box will initially be blank.

### 4.6.1.4 Report Destination Radio Button Group

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the Generate How Clients Heard about WIC Report dialog is enabled. It will default to Display on Screen.

### 4.6.1.5 OK Button

This control will allow the user to instruct the system to edit the values of the controls on the form, generate the report, and exit the dialog. The OK button will be enabled when the Generate How Clients Heard about WIC Report dialog is active (See *Saving the Data* in the Processing section below.). Characteristics for the OK button are defined in *Consistencies*.

#### 4.6.1.6 Cancel Button

This control will allow the user to exit the dialog without generating a report. The Cancel button will be enabled when the Generate How Clients Heard about WIC Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 4.6.2 Processes

#### 4.6.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to “Generate How Clients Heard about WIC Report”
- All Clinics will be displayed in the Clinic(s) list box in numeric order by Clinic ID and no clinic is initially selected
- The Date Range From masked edit box will be initially blank.
- The Date Range To masked edit box will be initially blank.

#### 4.6.2.2 Edits

Upon selection of the OK button:

- If at least one selection is not made in the Clinic(s) list box, the system will invoke a standard error message with the text “A selection is required in the {name of control}.”
- If an entry is not made in the Date Range From masked edit box, the system will invoke a standard error message with the text “An entry is required for the {name of control}.”
- The date entered in the Date Range From masked edit box must be equal to or less than the current system date or the system will invoke a standard error message with the text “Date entered must be less than or equal to today’s date.”
- The date entered in the Date Range From masked edit box must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text “Invalid date entered.”
- If an entry is not made in the Date Range To masked edit box, the system will invoke a standard error message with the text “An entry is required for the {name of control}.”
- The date entered in the Date Range To masked edit box must be equal to or less than the current system date or the system will invoke a standard error message with the text “Date entered must be less than or equal to today’s date.”
- The date entered in the Date Range To masked edit box must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text “Invalid date entered.”

- The Date Range From masked edit box value must be equal to or less than the value of the Date Range To masked edit box. If the Date Range From masked edit box value is not equal to or less than the Date Range To masked edit box value, the system will invoke a standard error message with the text “Beginning of date range must be equal to or less than end of date range.”

#### *4.6.2.3 Generate How Clients Heard about WIC Report*

Upon successful completion of the edits listed above, the system will generate the How Clients Heard about WIC report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see System Tools).
- If Report Destination is PDF, the system will invoke the “Save As” dialog. The user may select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

### 4.7 How Clients Heard about WIC Report (Output) CAS003

This report will allow the user to print a summary report of referral sources as to how the client was referred to WIC.

How Clients Heard about WIC Report		
CAS003	How Clients Heard about WIC	02/27/2000
<REPORT HEADER>	01/30/2000 - 02/28/2000	12:30:00
<STAFF MEMBER>		Page 1
Clinic: Neighborhood Health Clinics, Inc.		
	Referring Agency	Quantity
	-----	-----
	Doctor's Office	9
	Friend	35
	Other Health Services	98
	Radio Advertisement	12
		-----
	Subtotal for Clinic	154
<<page break before next clinic for state report>>		
<<repeat clinic for next site in sorted order>>		
	Total for Report	258

#### 4.7.1 Data Elements

##### 4.7.1.1 Report Title

The title of the report will be the text of "How Clients Heard about WIC". A subtitle will indicate the date range selected for the report.

##### 4.7.1.1.1 Origin of Data Element

The report date will be selected by the user on the How Clients Heard about WIC dialog described in this document.

##### 4.7.1.1.2 Format

The date values will appear in MM/DD/CCYY format.

##### 4.7.1.2 Clinic Name

This value will be the name of the clinic the report is detailing.

#### 4.7.1.2.1 Origin of Data Element

The value will be taken from the Service-Site-Name attribute of the SERVICE-SITE entity.

#### 4.7.1.2.2 Format

The value will appear as its literal value.

#### 4.7.1.3 *Clinic Name*

This value will be one of the clinics the user selected on the How Clients Heard about WIC dialog described in this document.

#### 4.7.1.3.1 Origin of Data Element

The value will be taken from the Service-Site-ID attribute and Service-Site-Name attribute of the SERVICE-SITE entity for the clinic the user selected.

#### 4.7.1.3.2 Format

The value will appear as its literal value.

#### 4.7.1.4 *Referring Agency*

This value will display how the client heard about WIC.

#### 4.7.1.4.1 Origin of Data Element

The value will be taken from the How-Heard-About-WIC attribute of the HOUSEHOLD entity.

#### 4.7.1.4.2 Format

The value will appear in its literal format.

#### 4.7.1.5 *Quantity*

This value will be a calculation based on records meeting specific criteria.

#### 4.7.1.5.1 Origin of Data Element

The value will be taken from the record count where the Application-Date attribute from the MEMBER entity and the How-Heard-About-WIC in the HOUSEHOLD entity meet the report parameters.

#### 4.7.1.5.2 Format

The value will appear in #,### format.

### 4.7.2 Filter Criteria

#### 4.7.2.1 Clinic

The participant must be enrolled at one of the clinics selected in the report dialog.

#### 4.7.2.2 Application Date

The participant's date of application must fall within the selected beginning and ending range entered in the report dialog.

### 4.7.3 Sort Order

#### 4.7.3.1 Clinic

The report will be sorted by clinic.

#### 4.7.3.2 Referral Name

The report will be sorted by referral name within clinic.

### 4.7.4 Control Break

#### 4.7.4.1 Clinic

On a change of clinic, a sum of the referrals for that site will be printed and a page break will occur.

### 4.7.5 Grand Total

#### 4.7.5.1 Count of Referrals

A final summary count of the number of referrals according to the filter criteria will be included at the end of the report.

## 4.8 Generate Waiting List Summary Report Dialog

This dialog will allow the user to generate a report of participants who are on the waiting list for WIC participation. This dialog is invoked when the user selects the Waiting List Summary Report option on the System Outputs, Generate Reports dialog

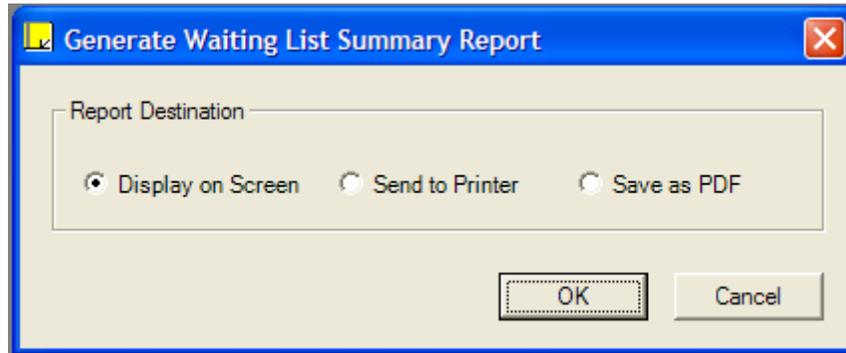


Figure 5 – Generate Waiting List Summary Report Dialog

### 4.8.1 Controls

#### 4.8.1.1 Report Destination Radio Button Group

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the Generate Waiting List Summary Report dialog is enabled. It will default to Display on Screen.

#### 4.8.1.2 OK Button

This control allows the user to instruct the system to edit the values of the controls, generate the report, and exit the Generate Waiting List Summary Report dialog. The OK button will be enabled when the Generate Waiting List Summary Report dialog is active. Characteristics for the OK button are defined in *Consistencies*.

#### 4.8.1.3 Cancel Button

This control allows the user to exit the Generate Waiting List Summary Report dialog without generating a report. The Cancel button will be enabled when the Generate Waiting List Summary Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 4.8.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Waiting List Summary Report dialog.

#### 4.8.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to “Generate Waiting List Summary Report”

#### 4.8.2.2 Edits

Upon selection of the OK button:

There are no user supplied parameters for this report, therefore a simple yes/no message will be presented to verify the user wishes to print the report.

#### 4.8.2.3 Generate Waiting List Summary Report

Upon successful completion of the edits listed above, the system will generate the Waiting List Summary Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see System Tools).
- If Report Destination is PDF, the system will invoke the “Save As” dialog. The user may select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

### 4.9 Waiting List Summary Report (Output) CAS004

This report will allow the user to print a summary report of participants who are on the waiting list for WIC participation

Waiting List Summary Report						
CAS004	Waiting List Summary Report				02/27/2000	
<REPORT HEADER>					12:30:00	
<STAFF MEMBER>					Page 1	
Clinic: Neighborhood Health Clinics, Inc.						
Priority	WIC Category					Total
	P	Women B	N	Infant I	Child C	
Unknown	0	0	0	0	0	0
Priority 1	0	0	0	0	0	0
Priority 2	0	0	1	0	1	2
Priority 3	0	0	0	0	0	0
Priority 4	234	921		124		1,279
Priority 5	0	0	0	0	1,342	1,342
Priority 6	0	0	10,721	0	0	10,721
Subtotal	234	921	10,722	124	1,343	13,344
<<page break before change of clinic>>						
<<page break before grand total for state when state executed>>						
Grand Total						
Priority	WIC Category					Total
	P	Women B	N	Infant I	Child C	
Unknown	0	0	0	0	0	0
Priority 1	0	0	0	0	0	0
Priority 2	0	0	0	0	0	0
Priority 3	0	0	0	0	0	0
Priority 4	1,434	3,921	0	4,024	0	9,779
Priority 5	0	0	0	0	7,382	7,382
Priority 6	0	0	30,721	0	0	30,721
Total	1,434	3,921	30,721	4,424	7,382	47,882

## 4.9.1 Data Elements

### 4.9.1.1 Report Title

The title of the report will be the text of “Waiting List Summary Report”.

#### 4.9.1.1.1 Origin of Data Element

This is a literal value and will come from a constant repository.

#### 4.9.1.1.2 Format

The value will appear as its literal value.

### 4.9.1.2 Clinic Name

This value will be the name of the clinic the report is detailing.

#### 4.9.1.2.1 Origin of Data Element

The value will be taken from the Service-Site-Name attribute of the SERVICE-SITE entity.

#### 4.9.1.2.2 Format

The value will appear as its literal value.

### 4.9.1.3 Counts

This value for this data is the number of participants meeting the column parameters.

#### 4.9.1.3.1 Origin of Data Element

The value will be the number of participants that have WIC-Status attributes in the MEMBER entity that match the column type and Cert-Assigned-Priority attribute in the CERT-CONTACT entity that match the row type.

#### 4.9.1.3.2 Format

The value will appear in #,### format.

## 4.9.2 Filter Criteria

### 4.9.2.1 *Waitlisted Participants*

Participants with a Wait-List-Begin-Date other than blank and a Wait-List-End-Date that is blank in the MEMBER entity will be candidates for this report.

## 4.9.3 Sort Order

### 4.9.3.1 *Clinic*

The report will be sorted by clinic.

### 4.9.3.2 *Priority*

The report will be sorted by priority within clinic.

### 4.9.3.3 *WIC Category*

The report will be sorted by WIC Category within priority within clinic.

## 4.9.4 Control Break

### 4.9.4.1 *Clinic*

On a change of clinic, a page break will occur.

## 4.9.5 Grand Total

### 4.9.5.1 *Count of Waitlisted Participants by Priority and WIC Category*

Final summary counts of the number of waitlisted participants will be included. It will be categorized by priority and WIC Category groups. Totals of each WIC Category across all priorities and of each priority across all WIC Categories will be included. Please see the sample report in this document for a better understanding of the grand total.

## 4.10 Generate Ineligibility Summary Report Dialog

This dialog will allow the user to generate a report on ineligible participants based upon clinic. This dialog is invoked when the user selects the Ineligible Summary option on the System Outputs, Generate Reports dialog.

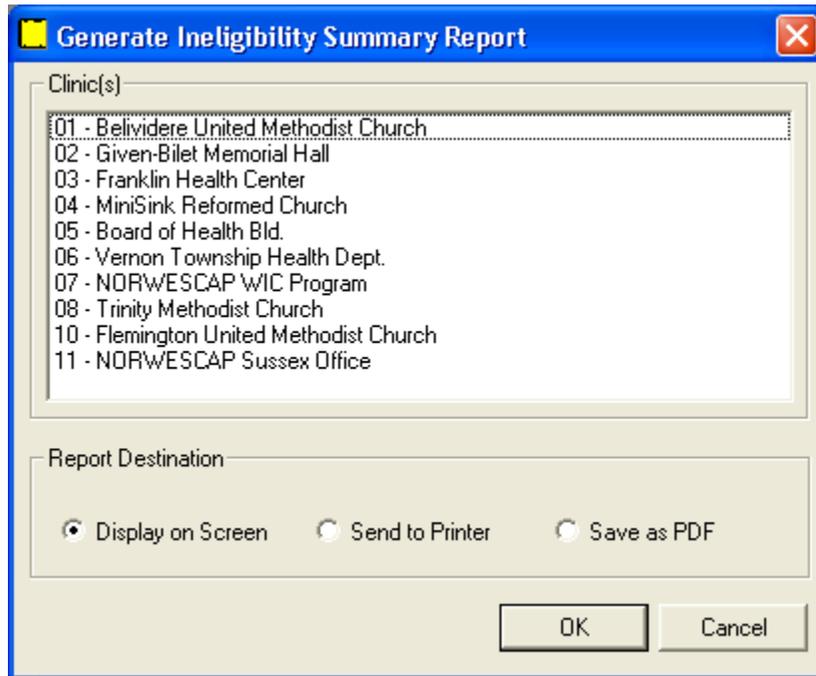


Figure 6 – Generate Ineligibility Summary Report Dialog

### 4.10.1 Controls

#### 4.10.1.1 Clinic List Box

The clinic list box allows the user to select from a list of clinic names. The control will be enabled when the Generate Ineligibility Summary Report dialog is active. The clinic list will be filled with entries for each clinic defined in the clinic entity that belongs to the clinic database. The entries will appear in numerical order by Clinic ID. No clinics will be highlighted initially.

#### 4.10.1.2 Report Destination Radio Button Group

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the Generate Ineligibility Summary Report dialog is enabled. It will default to Display on Screen.

#### 4.10.1.3 OK Button

This control will allow the user to instruct the system to edit the values of the controls on the form, generate the report, and exit the dialog. The OK button will be enabled when the Generate Ineligibility Summary Report dialog is active (See *Saving the Data* in the Processing section below.). Characteristics for the OK button are defined in *Consistencies*.

#### 4.10.1.4 Cancel Button

This control will allow the user to exit the dialog without generating a report. The Cancel button will be enabled when the dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 4.10.2 Processes

#### 4.10.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to “Generate Ineligibility Summary Report”
- All Clinics will be displayed in the Clinic(s) list box in numeric order by Clinic ID and no clinic is initially selected

#### 4.10.2.2 Edits

Upon selection of the OK button:

- If at least one selection is not made in the Clinic(s) list box, the system will invoke a standard error message with the text “A selection is required in the {name of control}.”

#### 4.10.2.3 Generate Ineligible Summary Report

Upon successful completion of the edits listed above, the system will generate the Ineligible Summary report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see System Tools).
- If Report Destination is PDF, the system will invoke the “Save As” dialog. The user may select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

### 4.11 Ineligibility Summary Report (Output) CAS005

This report will allow the user to print a summary report of participants who are deemed ineligible for WIC services during a certification attempt.

Ineligibility Summary Report		
CAS005	Ineligibility Summary Report	
<REPORT HEADER>		
02/27/2000		
<STAFF MEMBER>		
		12:30:00
		Page 1
Clinic: Neighborhood Health, Inc.		
	WIC	
Ineligibility Reason	Category	Count
-----	-----	-----
Outside of Income Guidelines	P	43
	B	567
	N	54
	I	23
	C	64
		-----
Subtotal		751
Children No Longer Eligible	C	43
		-----
Subtotal		43
Clinic Subtotal for Neighborhood Health, Inc.		794
<<Page break before next clinic>>		

#### 4.11.1 Data Elements

##### 4.11.1.1 Report Title

The title of the report will be the text of “Ineligibility Summary Report”.

##### 4.11.1.1.1 Origin of Data Element

This is a literal value and will come from a constant repository.

##### 4.11.1.1.2 Format

The value will appear as its literal value.

##### 4.11.1.2 Clinic Name

This value will be the name of the clinic the report is detailing.

#### 4.11.1.2.1 Origin of Data Element

The value will be taken from the Service-Site-Name attribute of the SERVICE-SITE entity.

#### 4.11.1.2.2 Format

The value will appear as its literal value.

#### *4.11.1.3 Ineligibility Reason*

This value is the reason why the persons counted were ineligible.

#### 4.11.1.3.1 Origin of Data Element

The value will be taken from the Cert-WIC-Status attribute in the CERT-CONTACT entity. The literal value will be taken from the lookup database.

#### 4.11.1.3.2 Format

The value will appear in #,### format.

#### *4.11.1.4 WIC Category*

This value is the participant's WIC Category.

#### 4.11.1.4.1 Origin of Data Element

The value referenced to attain the Count field will be the Cert-WIC-Status attribute in the CERT-CONTACT entity.

#### 4.11.1.4.2 Format

The value will appear as its literal value.

#### *4.11.1.5 Count*

This value is the number of participants meeting the row parameters.

#### 4.11.1.5.1 Origin of Data Element

This value will be the number of records that meet the above classifications.

#### 4.11.1.5.2 Format

The value will appear in #,### format.

#### **4.11.2 Filter Criteria**

##### *4.11.2.1 Clinic*

The client must be enrolled at one of the clinics selected in the report dialog.

#### **4.11.3 Sort Order**

##### *4.11.3.1 Clinic*

The report will be sorted by clinic.

##### *4.11.3.2 Ineligibility Reason*

The report will be sorted by ineligibility reason within clinic.

#### **4.11.4 Control Break**

##### *4.11.4.1 Clinic*

On a change of clinic, a sum of ineligible participants will occur and a page break will occur.

##### *4.11.4.2 Ineligibility Reason*

On a change of reason, a sum of ineligible participants will occur.

#### **4.11.5 Grand Total**

##### *4.11.5.1 Summary of Ineligible Participants*

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 Category, will be included on a separate page at the end of the report.

##### *4.11.5.2 Count of Ineligible Participants*

A final summary count of the number of participants who are no longer eligible for benefits according to the filter criteria will be included at the end of the report.

#### 4.12 Generate Special Formula Prescription Expiration Date Report Dialog

The Special Formula Prescription Expiration Date Report dialog allows the user to generate a report that lists the special formula prescriptions that are expiring within a specified time range. It is invoked when the user selects the Special Formula Prescription Expiration Date list item from the System Outputs, Generate Reports display list.

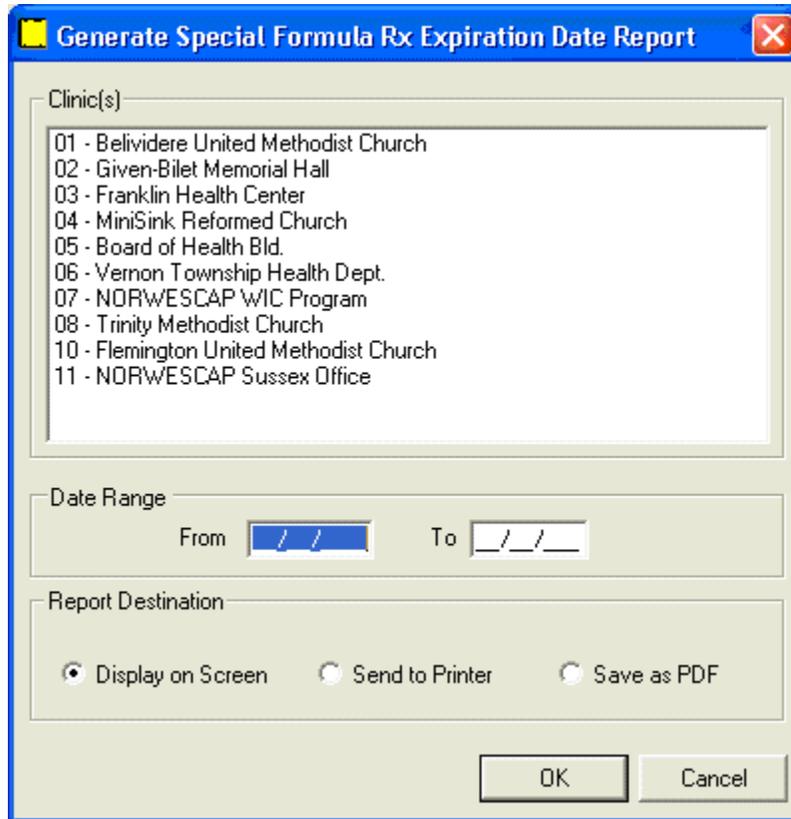


Figure 7 - Generate Special Formula Rx Expiration Date Report Dialog

## 4.12.1 Controls

This section describes the behavior of the controls on the Generate Special Formula Rx Expiration Date Report dialog.

### *4.12.1.1 Clinic(s) list box*

This control allows the user to select the clinics to include in the Special Formula Prescription Expiration Date report. The list box will be enabled when the Generate Special Formula Rx Expiration Date Report dialog is active. It will be filled with entries for each clinic defined for their local agency. The entries will be sorted by clinic ID. No clinic will be selected initially. Multiple selections may be made by the user.

### *4.12.1.2 Date Range From Masked Edit Box (From)*

This control allows the user to enter the start date of the date range on which to filter the Special Formula Prescription Expiration Date report. The masked edit box will be enabled when the Generate Special Formula Rx Expiration Date Report dialog is active. It will only accept entry of numeric digits. The mask on the box will be “####/####” to accept a date with a four digit year. The masked edit box will initially be blank.

### *4.12.1.3 Date Range To Masked Edit Box (to)*

This control allows the user to specify the end date of the date range on which to filter the Special Formula Prescription Expiration Date report. The masked edit box will be enabled when the Generate Special Formula Rx Expiration Date Report dialog is active. It will only accept entry of numeric digits. The mask on the box will be “####/####” to accept a date with a four digit year. The masked edit box will initially be blank.

### *4.12.1.4 Report Destination Radio Button Group*

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

#### 4.12.1.5 OK Button

This control allows the user to instruct the system to edit the values of the controls, generate the report, and exit the Generate Special Formula Rx Expiration Date Report dialog. The OK button will be enabled when the Generate Special Formula Rx Expiration Date Report dialog is active (See *Saving the Data* in the Processing section below.). Characteristics for the OK button are defined in *Consistencies*.

#### 4.12.1.6 Cancel Button

This control allows the user to exit the Generate Special Formula Rx Expiration Date Report dialog without generating a report. The Cancel button will be enabled when the Generate Special Formula Rx Expiration Date Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 4.12.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Special Formula Rx Expiration Date Report dialog.

#### 4.12.2.1 Initializing the Interface

Upon initial presentation of the dialog:

- The title bar text will be set to “Generate Special Formula Rx Expiration Date Report”
- All Clinics will be displayed in the Clinic(s) list box in numeric order by Clinic ID and no clinic is initially selected
- The Date Range From masked edit box will be initially blank.
- The Date Range To masked edit box will be initially blank.

#### 4.12.2.2 Edits

Upon selection of the OK button:

- If at least one selection is not made in the Clinic(s) list box, the system will invoke a standard error message with the text “A selection is required in the {name of control}.”
- If an entry is not made in the Date Range From masked edit box, the system will invoke a standard error message with the text “An entry is required for the {name of control}.”
- The date entered in the Date Range From masked edit box must be equal to or greater than the current system date or the system will invoke a standard error message with the text “Date entered must be equal to or greater than today’s date.”

- The date entered in the Date Range From masked edit box must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text “Invalid date entered.”
- If an entry is not made in the Date Range To masked edit box, the system will invoke a standard error message with the text “An entry is required for the {name of control}.”
- The date entered in the Date Range To masked edit box must be equal to or greater than the current system date or the system will invoke a standard error message with the text “Date entered must be equal to or greater than today’s date.”
- The date entered in the Date Range To masked edit box must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text “Invalid date entered.”
- The Date Range From masked edit box value must be equal to or less than the value of the Date Range To masked edit box. If the Date Range From masked edit box value is not equal to or less than the Date Range To masked edit box value, the system will invoke a standard error message with the text “Beginning of date range must be equal to or less than end of date range.”

#### *4.12.2.3 Generate Special Formula Rx Expiration Date Report*

Upon successful completion of the edits listed above, the system will generate the Special Formula Prescription Expiration Date to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see System Tools).
- If Report Destination is PDF, the system will invoke the “Save As” dialog. The user may select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

### 4.13 Special Formula Prescription Expiration Date Report (Output) CAS006

This report allows the user to print a report that lists the special formula prescriptions that are expiring within a specified time range. The report is generated from the Generate Special Formula Prescription Expiration Date Report dialog.

Special Formula Prescription Expiration Date Report			
CAS006			
<REPORT HEADER>	Special Formula Prescription Expiration Date Report	2/17/2002	
<STAFF MEMBER>	Prescriptions Ending for the Date Range	12:30:00	
	of 02/17/2002 to 03/31/2002	Page	1
Local Agency: 04 - Knox County WIC Program			
Clinic: 02 - Daviess County WIC Program			
Prescription		State	Name and Type of
End Date	Participant Name	WIC ID	Formula
-----	-----	-----	-----
02/19/2002	Jones, Barbara	12223987	14.0-OZ CAN(S) ALSOY POWDERED
02/19/2002	Luerding, Jeff	11658443	13-OZ CAN(S) CONCENTRATE ISOMIL
03/07/2002	Brown, John	11248764	32-OZ CAN(S) ISOMIL READY-TO-USE
03/19/2002	Helms, Margaret	11256664	14.0-OZ CAN(S) ALSOY POWDERED

#### 4.13.1 Data Elements

This section describes the data elements that will print on the document.

##### 4.13.1.1 Report Title

The title of the report will be the text “Special Formula Prescription Expiration Date Report” and the subtitle of the report will be the text “Prescriptions Ending for the Date Range” with the report date range specified by the user.

##### 4.13.1.1.1 Origin of Data Element

The report date range will be selected by the user on the Generate Special Formula Prescription Expiration Date Report dialog described in this document.

##### 4.13.1.1.2 Format

The date values will print in MM/DD/CCYY format.

#### *4.13.1.2 Local Agency Number and Name*

This value will be the number and name of the local agency where the participant receives service.

##### 4.13.1.2.1 Origin of Data Element

The value will be populated from the appropriate values in the reference dictionary table of the lookup database for the Agency-ID of the MEMBER entity.

##### 4.13.1.2.2 Format

The values will print as their literal value.

#### *4.13.1.3 Clinic Number and Name*

This value will be the number and name of the clinic where the participant receives service.

##### 4.13.1.3.1 Origin of Data Element

The value will be populated from the appropriate values in the reference dictionary table of the lookup database for the Service-Site-ID of the MEMBER entity.

##### 4.13.1.3.2 Format

The values will print as their literal value.

#### *4.13.1.4 Prescription End Date*

This value will be the date that the special formula prescription expires for the participant.

##### 4.13.1.4.1 Origin of Data Element

The value will be taken from the Special-Rx-End attribute of the FOOD-PRESCRIPTION-ITEM entity of the participant.

##### 4.13.1.4.2 Format

The value will print in MM/DD/CCYY format.

#### *4.13.1.5 Participant Name*

This value will be the full name of the participant with a special formula prescription that expires within the specified date range.

#### 4.13.1.5.1 Origin of Data Element

The value will be taken from the Last-Name, First-Name and Middle-Initial attributes of the MEMBER entity for the client.

#### 4.13.1.5.2 Format

The value will print in {last name}, {first name}, {middle initial} format.

#### *4.13.1.6 State WIC ID*

This value will be the State WIC ID of the participant.

#### 4.13.1.6.1 Origin of Data Element

The value will be taken from the State-WIC-ID attribute of the MEMBER entity of the client.

#### 4.13.1.6.2 Format

The value will print as its literal value.

#### *4.13.1.7 Name and Type of Formula*

This value will be the name and type of formula on the special formula prescription.

#### 4.13.1.7.1 Origin of Data Element

The value will be populated from the appropriate values in the reference dictionary table of the lookup database for the Food-Item of the FOOD-PRESCRIPTION-ITEM entity.

#### 4.13.1.7.2 Format

The value will print as its literal value.

### **4.13.2 Filter Criteria**

#### *4.13.2.1 Participants Enrolled at Specified Clinics*

All participants enrolled at the user-specified clinics will be included in the report.

#### *4.13.2.2 Special Formula Prescription Expires*

Only participants with a special formula prescription that expires within the specified date range will be included in the report. The Special-Rx-End-Date attribute of the FOOD-PRESCRIPTION-ITEM entity will be checked.

### **4.13.3 Sort Order**

#### *4.13.3.1 Clinic*

The report will be sorted first by clinic.

#### *4.13.3.2 Prescription End Date*

The report will be sorted by the special formula prescription end date within the clinic.

#### *4.13.3.3 Participant Name*

The report will be sorted by participant name within the special formula prescription end date.

### **4.13.4 Control Break**

#### *4.13.4.1 Clinic*

A page break will occur on a change of clinic.

### **4.13.5 Grand Total**

No totals are defined for this report.

#### 4.14 Generate Participant Insurance Type Reports Dialog

This report will allow the user to print a summary report that examines the types of insurance indicated by participants during certification/subsequent certification. Possible insurance types include but are not limited to; commercial insurance, HMO-Private, Medicaid, Medicaid/Managed Care, none, other, and unknown. It is invoked when the user selects the Participant Insurance Type Report list item from the System Outputs, Generate Reports display list.

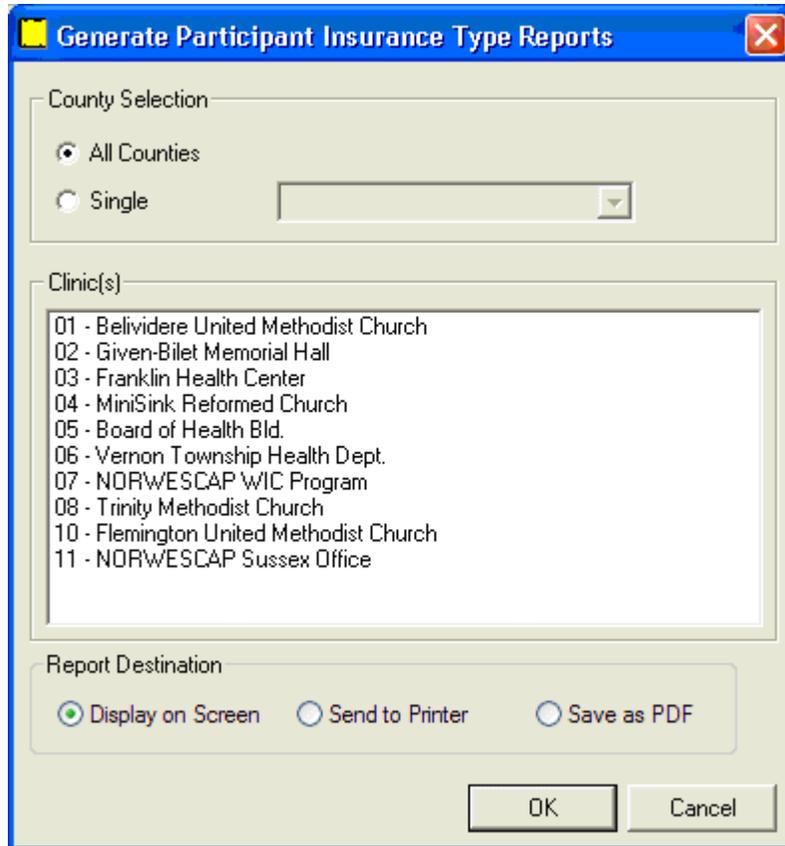


Figure 8 – Generate Participant Insurance Type Reports Dialog

#### 4.14.1 Controls

##### 4.14.1.1 All Counties Radio Button Group

This control allows the user to indicate whether the report will include participants from all counties or a single specific county. The radio button group will be enabled when the Generate Participant Insurance Type Reports dialog is active. It consists of the following radio buttons:

- All
- Single

The All radio button will initially be selected.

#### *4.14.1.2 Single County dropdown list*

This control will allow the user to specify the specific county to report on. The list of counties will be obtained from the lookup database. This dropdown list will contain all the counties known to the system. It is initially disabled and is only enabled when the Single radio button in the Counties radio button group is true.

#### *4.14.1.3 Clinic List Box*

The clinic list box allows the user to select from a list of clinic names. The control will be enabled when the dialog is active. The clinic list will be filled with entries for each clinic defined in the clinic entity that belongs to the clinic database. The entries will appear in numeric order. No clinics will be highlighted initially.

#### *4.14.1.4 Report Destination Radio Button Group*

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

#### *4.14.1.5 OK Button*

This control will allow the user to instruct the system to edit the values of the controls on the form, generate the printout, and exit the dialog. The OK button will be enabled when the dialog is active (See *Saving the Data* in the Processing section below.). Characteristics for the OK button are defined in *Consistencies*.

#### *4.14.1.6 Cancel Button*

This control will allow the user to exit the dialog without generating a report. The Cancel button will be enabled when the dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### **4.14.2 Processes**

#### *4.14.2.1 Initializing the Interface*

Upon initial presentation of the dialog:

- The title bar text will be set to “Generate Participant Insurance Type Reports”
- All Clinics will be displayed in the Clinic(s) list box in numeric order by Clinic ID and no clinic is initially selected

#### 4.14.2.2 Edits

Upon selection of the OK button:

- If the Single option button is selected, the user must make a selection from the dropdown list. If an entry is not selected in the control, the system will invoke a standard error message with the text of “Select a County or the All Counties option.”
- If at least one selection is not made in the Clinic(s) list box, the system will invoke a standard error message with the text “A selection is required in the {name of control}.”

#### 4.14.2.3 Generate Participant Insurance Type Report

Upon successful completion of the edits listed above, the system will generate the Participant Insurance Type Report to the selected report destination:

- If Report Destination is Screen, the system will display the report on the screen.
- If Report Destination is Printer, the system will generate the report and send it to the selected other output printer (see System Tools).
- If Report Destination is PDF, the system will invoke the “Save As” dialog. The user may select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the file to the selected folder.

### 4.15 Participant Insurance Type Report (Output) CAS007

This report will allow the user to generate two summary reports with the type of insurance used by participants. One of the reports shows the insurance type by county and the other shows county by insurance type.

Participant Insurance Type Report						
CAS007	Participant Insurance Type Report					02/27/2000
<REPORT HEADER>	Summary of Type by County					12:30:00
<STAFF MEMBER>	As of 09/30/2005					Page 1
Clinic: 01 - Mooresville WIC Clinic						
+-----+ WIC Category -----+						
Insurance Type	+-----+ Women	+-----+ Infant	Child			
County	P	B	N	I	C	Total
-----						
Commercial Insurance						
BENTON	432	100	25	53	34	644
BOONE	34	232	32	21	67	386
CLINTON	674	457	342	432	984	2,889
TIPPECANOE	563	343	232	212	122	1,472
WABASH	23	12	21	67	56	179
MOORE	32	32	67	89	45	265
-----						
Subtotal	1,758	1,176	719	874	1,308	5,835
<<page break before each insurance type>>						
Medicaid						
BENTON	32	23	32	67	56	210
BOONE	54	67	89	45	67	322
-----						
Subtotal	86	90	121	112	123	532
<<page break after each clinic>>						
<<page break before grand total page, same heading as above less county>>						
Commercial Insurance	3,433	1,343	2,344	2,343	2,341	11,804
HMO-Private	3,427	7,897	7,896	5,675	7,853	32,748
Medicaid	7,476	5,645	8,856	4,576	6,745	33,298
Medicaid/Managed Care	4,563	4,533	7,986	3,453	3,454	23,989
Ins. Type Unspecified	3,456	7,845	8,765	4,575	4,567	29,208
Other	456	65	45	785	45	1,396
Unknown	34	67	76	45	65	287
-----						
Total	22,845	27,395	35,968	21,452	25,070	132,730

**Participant Insurance Type Report**

<REPORT HEADING>		Participant Insurance Type Report		02/27/2000		
<STAFF MEMBER>		Summary of County by Type		12:30:00		
		As of 09/30/2005		Page 1		
Clinic: 01 - Mooreseville WIC Clinic						
		+----- WIC Category -----+				
County		Women	Infant	Child		
Insurance Type	P	B	N	I	C	Total
-----						
BENTON						
Commercial Insurance	432	100	25	53	34	644
HMO-Private	427	897	896	675	853	3,748
Medicaid	476	645	856	576	745	3,298
Medicaid/Managed Care	563	533	986	453	454	2,989
None	456	845	765	575	567	3,208
Other	456	65	45	785	45	1,396
Unknown	34	67	76	45	65	287
-----						
Total	2,844	3,152	3,649	3,162	2,763	15,570
-----						
<<page break before each county summarization>>						
<<page break before grand total page, same heading as above>>						
Commercial Insurance	3,433	1,343	2,344	2,343	2,341	11,804
HMO-Private	3,427	7,897	7,896	5,675	7,853	32,748
Medicaid	7,476	5,645	8,856	4,576	6,745	33,298
Medicaid/Managed Care	4,563	4,533	7,986	3,453	3,454	23,989
None	3,456	7,845	8,765	4,575	4,567	29,208
Other	456	65	45	785	45	1,396
Unknown	34	67	76	45	65	287
-----						
	22,845	27,395	35,968	21,452	25,070	132,730
-----						

**4.15.1 Data Elements**

This section describes the data elements that will print on the document.

*4.15.1.1 Report Title*

4.15.1.1.1 Origin of Data Element

The title of the report will be the text “Participant Insurance Type Report” and the subtitle of the report will be the text “Summary of Type by County” as of the current system date.

#### 4.15.1.1.2 Format

The report title will print the report title and the current system date formatted MM/DD/CCYY.

### *4.15.1.2 Clinic ID and Name*

This value will be the ID and the name of the clinic the report is detailing.

#### 4.15.1.2.1 Origin of Data Element

The value will be taken from the ServiceSite.ServiceSiteID – ServiceSite.ServiceSiteName.

#### 4.15.1.2.2 Format

The value will appear as its literal value.

### *4.15.1.3 Insurance Type*

This value will be Insurance type reported for the Clinic.

#### 4.15.1.3.1 Origin of Data Element

The value will be taken from the ReferenceDictionary.Description where the ReferenceDictionary.Category = ‘INSTYPE’ where Member.InsuranceType is not null for the reported clinic.

#### 4.15.1.3.2 Format

The value will appear as its literal value.

### *4.15.1.4 County*

This value will be the County for each Insurance type reported for the Clinic.

#### 4.15.1.4.1 Origin of Data Element

The value will be taken from the County.Name for each participant reported for the clinic.

#### 4.15.1.4.2 Format

The value will appear as its literal value.

#### *4.15.1.5 Count of Insurance Type by WIC Category by County*

This value will be the count of participants in a current certification for the current system date for each WIC Category within each Insurance Type.

##### 4.15.1.5.1 Origin of Data Element

The value will be the Count of participants for each Member.WICStatus where Member.ValidCertification = 'Y' and Member.InsuranceType is not null. Grouped by Insurance Type and WIC Status within each county.

##### 4.15.1.5.2 Format

The value will be the count of the Insurance Type per WIC Category.

#### *4.15.1.6 Count of County by WIC Category by Insurance Type*

This value will be the count of participants in a current certification for the current system date for each WIC Category within each County.

##### 4.15.1.6.1 Origin of Data Element

The value will be the Count of participants for each Member.WICStatus where Member.ValidCertification = 'Y' and Member.InsuranceType is not null. Grouped by County and WIC Status within each Insurance Type.

##### 4.15.1.6.2 Format

The value will count of the Insurance Type per WIC Category.

### **4.15.2 Filter Criteria**

#### *4.15.2.1 County*

The report will be filtered by the county selection criteria of the user. The user can select either all counties or a single county to be included in the report. .

#### *4.15.2.2 Clinic*

The report will be further filtered by the Clinic selection criteria of the user. The user can select one or more Clinics to be included in the report.

#### *4.15.2.3 Valid Certification*

The report will display counts for those participants where Member.ValidCertification = 'Y'.

### **4.15.3 Sort Order - Report of Insurance Type by County**

#### *4.15.3.1 Clinic*

The report will be sorted first by Clinic.

#### *4.15.3.2 Insurance Type*

The report will be sorted by insurance type within the Clinic.

#### *4.15.3.3 County*

The report will be sorted by county within insurance type.

### **4.15.4 Sort Order - Report of County by Insurance Type**

#### *4.15.4.1 Clinic*

The report will be sorted first by Clinic.

#### *4.15.4.2 County*

The report will be sorted by county within Clinic.

#### *4.15.4.3 Insurance Type*

The report will be sorted by insurance type within county.

### **4.15.5 Control Break - Report of Insurance Type by County**

#### *4.15.5.1 Insurance Type*

On change of insurance type, a sub-total of participants by WIC Category will be printed and a page break will occur.

## **4.15.6 Control Break - Report of County by Insurance Type**

### *4.15.6.1 County*

On change of county, a sub-total of participants by WIC Category will be printed and a page break will occur.

## **4.15.7 Grand Total**

### *4.15.7.1 Count of Participants by Insurance Type and WIC Category*

Final summary counts of the number of participants will be included. It will be categorized by insurance types and WIC Category groups. Totals of each WIC Category across all types and of each type across all WIC Categories will be included.

## 4.16 Generate Outreach Listing Report Dialog

This dialog will allow the user to generate a list of outreach agencies and address labels for the selected filter criteria. It is invoked when the user selects the Outreach Listing Report list item from the Generate Reports dialog.

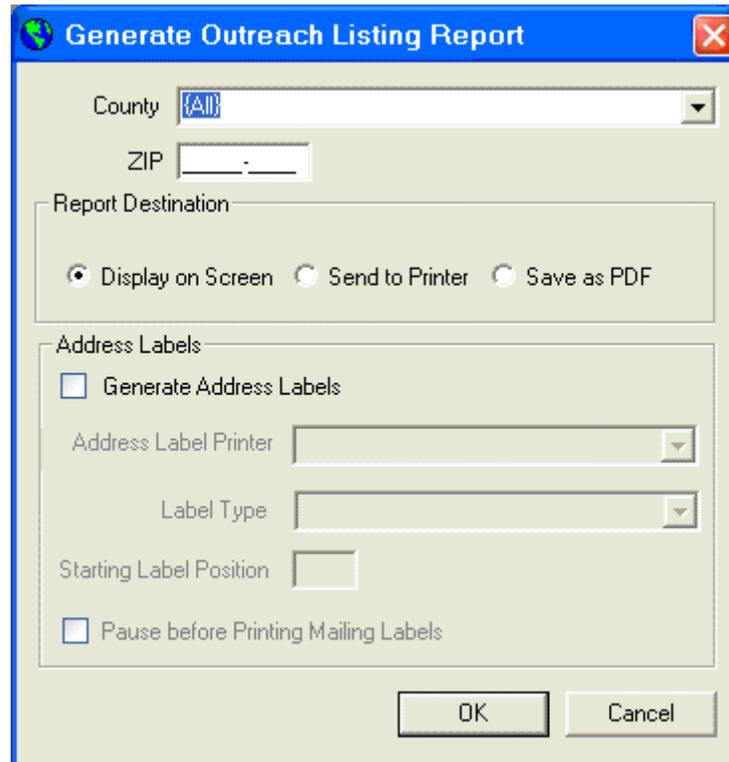


Figure 9 - Generate Outreach Listing Report Dialog

### 4.16.1 Controls

This section describes the behavior of the controls on the Generate Outreach Listing Report Dialog.

#### 4.16.1.1 County Dropdown

This control allows the user to select the county for which to print a listing of outreach agencies. The dropdown will be enabled when the dialog is active. It will contain a list of valid counties from a table in the lookup database. Additionally, it will contain an entry for {All} and {None Selected}. It will initially default to the {All} item.

#### ***4.16.1.2 ZIP***

This text box will allow the user to enter the zip code for which to print a listing of outreach agencies. This text box will be enabled when the dialog is active. The field will initially default to blank. The masked edit box will only allow the entry of numeric digits. The mask for the box will be “#####-####” to allow entry of a four digit ZIP extension, if known.

#### ***4.16.1.3 Report Destination Radio Button***

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the dialog is enabled. It will default to Display on Screen.

#### ***4.16.1.4 Generate Address Labels Check Box***

The Generate Address Labels check box allows the user to generate address labels for the outreach agencies that meet the filter criteria. The check box will be enabled when the dialog is active.

#### ***4.16.1.5 Address Label Printer Dropdown***

This control allows the user to select the printer on which to print the mailing labels. The dropdown will be enabled when the dialog is active and the Generate Address Labels check box is checked. It will contain a list of available printers. The dropdown will only contain a list of defined other output printers. The field is initially blank.

#### ***4.16.1.6 Label Type Dropdown***

This control will allow the user to select the mailing label type. The control will be enabled when the dialog is active and a printer is selected in the Address Label Printer dropdown . It will be filled with a list of the labels that may be printed by the application. The control will default to blank when enabled

#### ***4.16.1.7 Starting Label Text Box***

This control will allow the user to select which mailing label to start with on the label sheet. The control will be enabled when a laser printer is selected from the Label Printer dropdown. The control allows entry of numeric digits. The minimum value is 1 and the maximum value is 30.

#### 4.16.1.8 *Pause before Printing Mailing Labels Check Box*

This control will allow the user to instruct the system to pause before printing mailing labels on the printer so that mailing label stock may be loaded into the printer for producing the mailing labels. The control will be enabled when the Print Mailing Labels check box is checked. When enabled, it will be initially checked.

#### 4.16.1.9 *OK Button*

The OK button will be enabled when the dialog is active. Characteristics for the OK button are defined in *Consistencies*.

#### 4.16.1.10 *Cancel Button*

The Cancel button will be enabled when the dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 4.16.2 Processing

This section describes the processes that take place as a result of the actions taken on the Generate Outreach Listing Report dialog.

#### 4.16.2.1 *Initializing the Interface*

Upon initial presentation of the dialog:

- The title bar will be set to “Generate Outreach Listing Report”
- The County dropdown will initially be set to “All”
- All remaining controls will be initially blank.
- The Report Destination will default to “Display on Screen”
- The following controls will initially be disabled:
  - Address Label Printer
  - Label Type
  - Starting Label Position
  - Pause before Printing Mailing Labels

#### 4.16.2.2 *Edits*

Upon selection of the OK button:

- If no selection has been made in the County drop down list and no entry has been made in the ZIP entry field, the system will invoke a standard error message with the text “Either a County or a ZIP must be selected.”
- If an incomplete ZIP has been entered, the system will invoke a standard error message with the text “A complete entry is required for the <control label>.” If any part of the four-digit extension is entered, the entire extension is required.

- If the label printer dropdown is enabled and no label printer has been selected in the Label Printer dropdown, the system will invoke a standard error message with the text “You must select a label printer to print address labels.”
- If the Label Type selected is Avery 5160 and the Starting Label text box enabled and the value entered is less than 1 or greater than 30, the system will invoke a standard message with the text, “Starting Label range is 1 through 30.”
- If the Label Type selected is Avery 5163 and the text box enabled and the value entered is less than 1 or greater than 10, the system will invoke a standard message with the text, “Starting Label range is 1 through 10.”
- If the Starting Label text box is enabled and is blank, a message is displayed, “An entry is required for the Starting Label.”
- If the Label Type dropdown is enabled and no selection is made, the system will invoke a standard error message with the text “A selection is required in the Label Type.”
- If no outreach agencies are found that meet the criteria entered on the dialog, the system will invoke a standard error message with the text “There are no outreach agencies found that meet the specified criteria.”

#### 4.16.2.3 *Generate Outreach Listing*

Upon successful completion of the edits listed above, the system will generate the Outreach Listing report to the selected report destination:

- If Report Destination is Screen, the system will display the list on the screen.
- If Report Destination is Printer, the system will generate the list and send it to the selected other output printer (see *System Tools*).
- If Report Destination is PDF, the system will invoke the “Save As” dialog. The user may select the folder and enter the file name, or cancel. Upon entering a file name and selecting Save, the system will save the list in PDF format to the selected folder.

#### 4.16.2.4 *Print Labels*

If the Print Mailing Labels check box is selected:

- If the user has selected the Report Destination of “Send to Printer” and the Pause before Printing check box is checked, the system will pause after printing and invoke a standard message with the text “Load mailing labels for printing and press OK when ready.” This provides time for the user to load the label stock and instruct the system when ready to print., otherwise, the system will invoke this message upon return from the Print Preview or saving the PDF document.

- If the Pause before Printing check box is un-checked, the system will immediately print the labels following the generation of the Outreach Listing to the selected label printer or upon return from the Print Preview or Saving the PDF document without pausing.
- Printing of labels will begin on the specified number to the specified printer filling in the first column down then moving to the second column and then to the third column.

#### *4.16.2.5 Cancel*

Upon selection of the Cancel button, the system will dismiss the Send Letter dialog without generating the report or labels and return the user to the Generate Reports dialog

#### *4.16.2.6 Data Map*

There is no data saved as a result of this function.

### 4.17 Outreach Listing Report - Agency (Output) CAS009

This report will allow the user to print a detail report of outreach organizations.

Outreach Listing Report - Agency		
CAS009 <REPORT HEADING> <STAFF MEMBER>	Outreach Listing Report	07/12/2000 12:30:00 Page 1
County	Outreach Agency Agency, Contact, Address	
ADAMS	BAPTIST MEMORIAL HEALTH CENTER DR MARY HARDER, 609-555-3245 14 ADAMS AVENUE 609-555-3255 SUITE 202 WESTFIELD, IN 80251	
	ST. JAMES HEALTH CENTER MR. JOHN HOPKINS, 609-555-3843 383 55TH STREET 609-555-3266 ROOM 122 WEST HEIGHT, IN 80251	
SUSSEX	ST. JAMES HEALTH CENTER MS. SARAH JOHNSON, 609-555-3844 373 57TH STREET 609-555-3277 3 <sup>RD</sup> FLOOR BELLWOOD, IN 80251	
	WESTHEIGHT COMMUNITY CENTER MR. ROBERT BRANDENBURG, 609-555-2353 1245 78TH STREET 609-555-3288 SUITE 8938 SOHO, IN 80251	

Figure 10 – Outreach Listing

#### 4.17.1 Data Elements

This section describes the data elements that will print on the document.

##### 4.17.1.1 Report Title

The title of the report will be the text “Outreach Listing Report - Agency”.

##### 4.17.1.1.1 Origin of Data Element

This is a literal value.

#### 4.17.1.1.2 Format

The value will print as its literal value.

### *4.17.1.2 Outreach Agency County*

This value will be the county where the outreach agency is located.

#### 4.17.1.2.1 Origin of Data Element

The value will be taken from the CountyCD attribute of the ORGANIZATION entity.

#### 4.17.1.2.2 Format

The value will print as its literal value.

### *4.17.1.3 Outreach Agency Name*

This value will be the full name of the outreach agency.

#### 4.17.1.3.1 Origin of Data Element

The value will be taken from the Name attribute of the ORGANIZATION entity.

#### 4.17.1.3.2 Format

The value will print as its literal value.

### *4.17.1.4 Outreach Agency Contact*

This value will be the name of the contact for the outreach agency.

#### 4.17.1.4.1 Origin of Data Element

The value will be taken from the ContactName attribute of the ORGANIZATION entity.

#### 4.17.1.4.2 Format

The value will print as its literal value.

#### *4.17.1.5 Outreach Agency Telephone Number*

This value will be the telephone number for the outreach agency.

##### 4.17.1.5.1 Origin of Data Element

The value will be taken from the Telephone1 attribute of the ORGANIZATION entity.

##### 4.17.1.5.2 Format

The value will print in the format ###-###-####.

#### *4.17.1.6 Outreach Agency Address 1*

This value will be the mailing address for the outreach agency.

##### 4.17.1.6.1 Origin of Data Element

The value will be taken from the Address1 attribute of the ORGANIZATION entity.

##### 4.17.1.6.2 Format

The value will print as its literal value.

#### *4.17.1.7 Outreach Agency Address 2*

This value will be the mailing address for the outreach agency.

##### 4.17.1.7.1 Origin of Data Element

The value will be taken from the Address2 attribute of the ORGANIZATION entity.

##### 4.17.1.7.2 Format

The value will print as its literal value.

#### *4.17.1.8 Outreach Agency City*

This value will be the city for the outreach agency.

##### 4.17.1.8.1 Origin of Data Element

The value will be taken from the City attribute of the ORGANIZATION entity.

#### 4.17.1.8.2 Format

The value will print as its literal value.

#### *4.17.1.9 Outreach Agency Mailing State*

This value will be the mailing state for the outreach agency.

##### 4.17.1.9.1 Origin of Data Element

The value will be taken from the StateCD attribute of the ORGANIZATION entity.

##### 4.17.1.9.2 Format

The value will print as its literal value.

#### *4.17.1.10 Outreach Agency Mailing ZIP Code*

This value will be the mailing ZIP code for the outreach agency.

##### 4.17.1.10.1 Origin of Data Element

The value will be taken from the ZIPCODE attribute of the ORGANIZATION entity.

##### 4.17.1.10.2 Format

The value will print in #####-#### format.

### **4.17.2 Filter Criteria**

#### *4.17.2.1 Agency*

Outreach agencies associated with the OrganizationAgency.AgencyID for the selected AgencyID will be included in the report.

#### *4.17.2.2 Is Outreach Agency*

The report will list all Organizations where the Organization.IsOutreachAgency = 'Y'.

#### *4.17.2.3 County*

All outreach agencies where the Organization.CountyCD is associated with the selected county will be included in the report. If the value of 'All' is selected in the County dropdown, all counties will be included in the report.

#### *4.17.2.4 Zip Code*

All outreach agencies that have a ZIP code that matches the one entered by the user will be included in the report. Partial ZIP field selection will be accommodated. For example, entering 802 will provide all ZIP codes beginning with those three numbers. If no ZIP code is entered, all ZIP codes will be included.

### **4.17.3 Sort Order**

#### *4.17.3.1 County*

The report will be sorted first by County.

#### *4.17.3.2 Outreach Organization Name*

The report will be sorted by outreach organization name within the selected County.

### **4.17.4 Control Break**

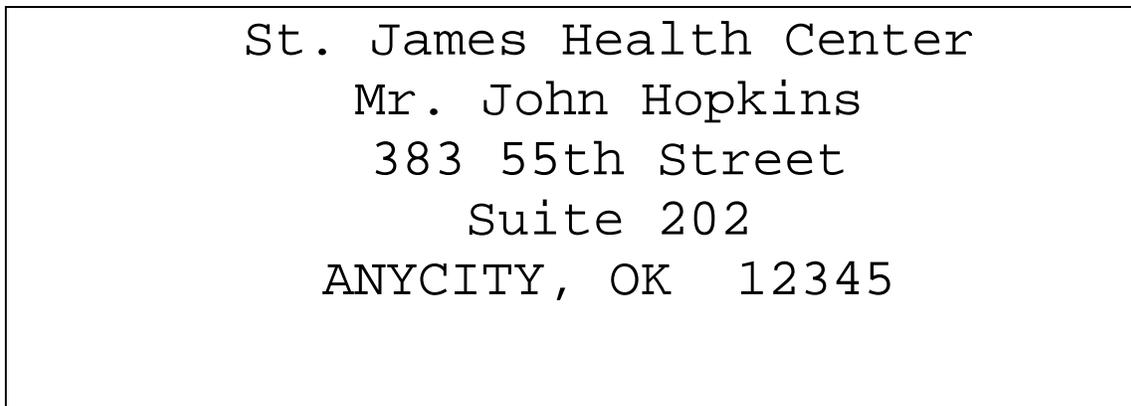
#### *4.17.4.1 County*

On a change of a CountyCD, a line break will occur.

### **4.17.5 Grand Total**

No final total is included in the report.

## **4.18 Outreach Address Labels**



```
St. James Health Center
Mr. John Hopkins
383 55th Street
Suite 202
ANYCITY, OK 12345
```

**Figure 11 - Outreach Address Labels Dialog – Agency**

## 4.18.1 Data Elements

This section describes the data elements that will print on the document.

### *4.18.1.1 Outreach Agency Name*

This value will be the full name of the outreach agency.

#### 4.18.1.1.1 Origin of Data Element

The value will be taken from the Name attribute of the ORGANIZATION entity.

#### 4.18.1.1.2 Format

The value will print as its literal value.

### *4.18.1.2 Outreach Agency Contact*

This value will be the name of the contact for the outreach agency.

#### 4.18.1.2.1 Origin of Data Element

The value will be taken from the ContactName attribute of the ORGANIZATION entity.

#### 4.18.1.2.2 Format

The value will print as its literal value.

### *4.18.1.3 Outreach Agency Address 1*

This value will be the mailing address for the outreach agency.

#### 4.18.1.3.1 Origin of Data Element

The value will be taken from the Address1 attribute of the ORGANIZATION entity.

#### 4.18.1.3.2 Format

The value will print as its literal value.

#### ***4.18.1.4 Outreach Agency Address 2***

This value will be the mailing address for the outreach agency.

##### **4.18.1.4.1 Origin of Data Element**

The value will be taken from the Address2 attribute of the ORGANIZATION entity.

##### **4.18.1.4.2 Format**

The value will print as its literal value.

#### ***4.18.1.5 Outreach Agency City***

This value will be the mailing city for the outreach agency.

##### **4.18.1.5.1 Origin of Data Element**

The value will be taken from the City attribute of the ORGANIZATION entity.

##### **4.18.1.5.2 Format**

The value will print as its literal value.

#### ***4.18.1.6 Outreach Agency State***

This value will be the mailing state for the outreach agency.

##### **4.18.1.6.1 Origin of Data Element**

The value will be taken from the StateCD attribute of the ORGANIZATION entity.

##### **4.18.1.6.2 Format**

The value will print as its literal value.

#### ***4.18.1.7 Outreach Agency ZIP Code***

This value will be the ZIP code for the outreach agency.

##### **4.18.1.7.1 Origin of Data Element**

The value will be taken from the ZIPCODE attribute of the ORGANIZATION entity.

#### 4.18.1.7.2 Format

The value will print in #####-#### format.

### 4.18.2 Filter Criteria

#### 4.18.2.1 Agency

Address Labels associated with the OrganizationAgency.AgencyID for the selected AgencyID will be included in the report..

#### 4.18.2.2 Is Outreach Agency

Address Labels for Organizations where the Organization.IsOutreachAgency = 'Y'.

#### 4.18.2.3 County

Address labels for outreach agencies where the Organization.CountyCD associated with the selected County will be printed. If the value of 'All' is selected in the County dropdown, all counties will be included in the report.

#### 4.18.2.4 Zip Code

Address Labels for outreach agencies that have a Zip code that matches the one entered by the user will be included. Partial zip field selection will be accommodated. For example, entering 802 will provide all zip codes beginning with those three numbers. If no ZIP is entered, all ZIP codes will be included.

### 4.18.3 Sort Order

#### 4.18.3.1 County

Address labels will be sorted first by County Name.

#### 4.18.3.2 Outreach Organization Name

Address labels will be sorted by outreach organization name within the selected County.

### 4.18.4 Control Break

None Indicated

### **4.18.5 Grand Total**

No final total is included in the report.