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8. Appointment Scheduling

This functionality of the WIC system allows the user to manage the scheduling, rescheduling and cancellation of appointments and group education classes. Appointment Scheduling allows the user to manually schedule appointments and group education classes for participants. Appointment notices and address labels can be automatically generated to inform participants of scheduled appointments and classes. Reports are available to review what appointments and group education classes have been scheduled and which were missed.

8.1 Select Appointment to Schedule

The Select Appointment to Schedule dialog is displayed once a user wants to schedule an appointment for a participant. When the dialog is displayed, the user will have a choice to schedule an individual appointment or a group class. The dialog is invoked in response to the following user actions:

- Selection of the OK button while the Schedule Appointment check box is marked on the Applicant Prescreening dialog described in Clinic *Chapter 07 - Initial Contact*.
- Selection of the Schedule Appointment menu item from the Participant Activities menu described in Clinic *Chapter 09 - Participant Folder*.
- Selection of the Schedule Appointment toolbar button from the Participant Folder toolbar described in Clinic *Chapter 09 - Participant Folder*.
- Selection of the Certify Applicant button while the Schedule Appointment check box is marked on the Applicant is Certified dialog described in Clinic *Chapter 10 - Certification Guided Script*.

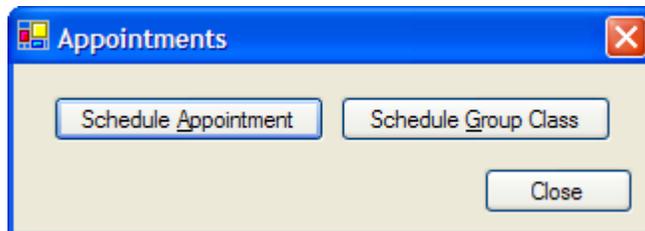


Figure 1 - Select Appointment to Schedule Dialog

8.1.1 Controls

8.1.1.1 Schedule Appointment button

The Schedule Appointment button will be enabled when the Select Appointment to Schedule dialog is active. It has a mnemonic of "A".

8.1.1.2 Schedule Group Class button

The Schedule Group Glass button will be enabled when the Select Appointment to Schedule dialog is active. It has a mnemonic of “G”.

8.1.1.3 Close button

The Close button will be enabled when the Select Appointment to Schedule dialog is active. Characteristics for the Close button are defined in *Consistencies*.

8.1.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Select Appointment to Schedule dialog.

8.1.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Appointments”.

8.1.2.2 Schedule Appointment

Upon selection of the Schedule Appointment button the application will invoke the Schedule Appointment for Household dialog as described later in this document.

8.1.2.3 Schedule Group Class

Upon selection of the Schedule Group Class button the application will invoke the Schedule Group Education Class for Household dialog as described later in this document.

8.1.2.4 Close

Upon selection of the Close button the application will dismiss the Select Appointment to Schedule dialog and return to the calling screen.

8.2 Schedule Appointment for Household

The Schedule Appointment for Household dialog allows the user to schedule an appointment for a household, one member at a time, for a specific date and time. This dialog is invoked when the user selects the Schedule Appointment button on the Select Appointment to Schedule dialog described previously in this document.

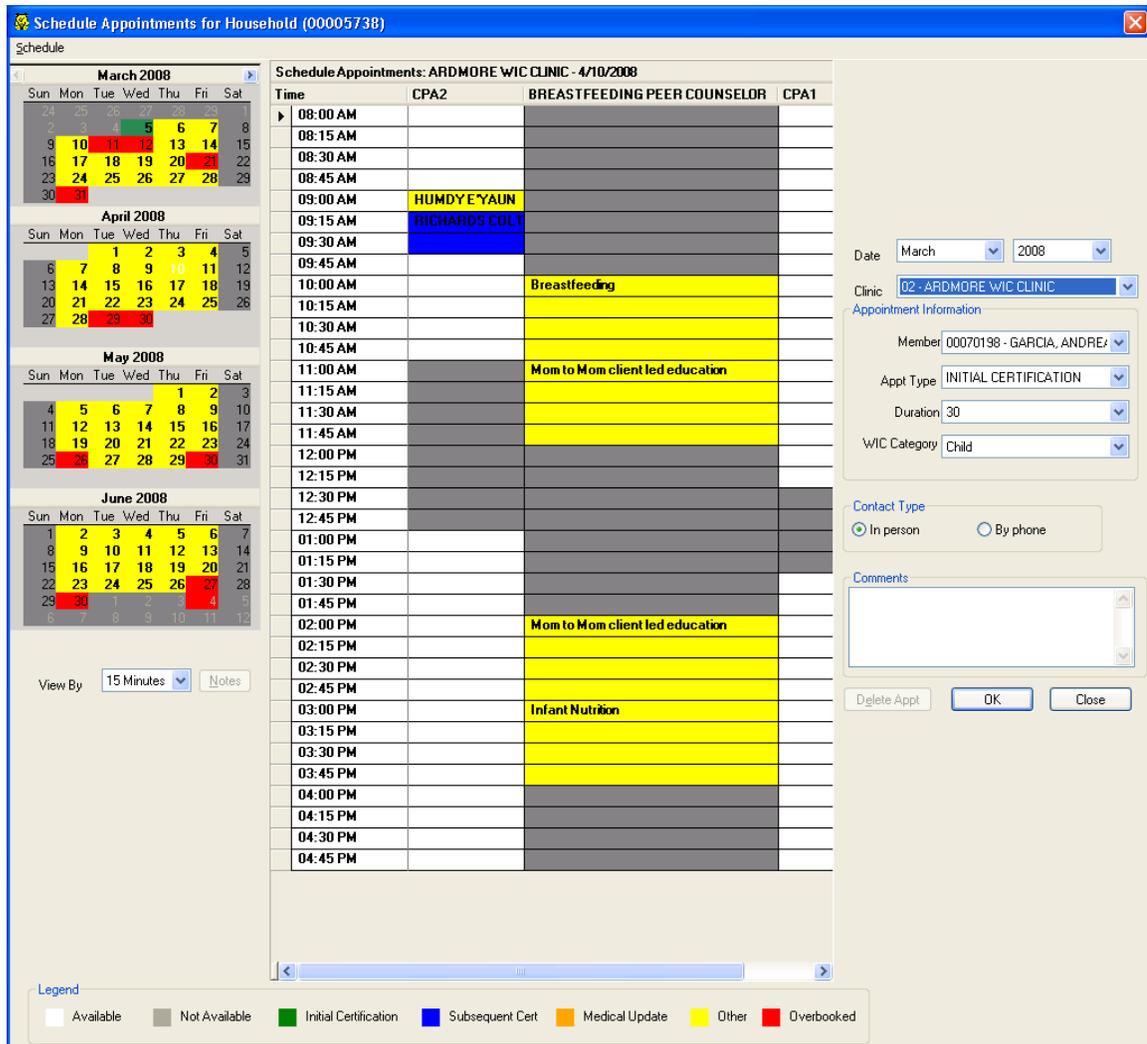


Figure 2 - Schedule Appointment for Household Dialog

8.2.1 Schedule Menu

The Schedule menu will be enabled when the Schedule Appointment for Household dialog is active. It will have a mnemonic of "S". It will display the following Menu Items:

- Change Appointment Type

- Change Clinic
- Change Date
- Change Duration
- Change Member
- Refresh Appointment Grid
- Schedule Appointment
- Delete Appointment
- Exit

8.2.2 Menu Items

8.2.2.1 Change Appointment Type Menu Item

The menu item will be available when the Schedule Appointment for Household dialog is active. It will have a mnemonic of “A”.

8.2.2.2 Change Clinic Menu Item

The menu item will be available when the Schedule Appointment for Household dialog is active. It will have a mnemonic of “L”.

8.2.2.3 Change Date Menu Item

The menu item will be available when the Schedule Appointment for Household dialog is active. It will have a mnemonic of “D”.

8.2.2.4 Change Duration Menu Item

The menu item will be available when the Schedule Appointment for Household dialog is active. It will have a mnemonic of “U”.

8.2.2.5 Change Member Menu Item

The menu item will be available when the Schedule Appointment for Household dialog is active. It will have a mnemonic of “M”.

8.2.2.6 Refresh Appointment Grid Menu Item

The menu item will be available when the Schedule Appointment for Household dialog is active. It will have a mnemonic of “R”.

8.2.2.7 Schedule Appointment Menu Item

The menu item will be available when the Schedule Appointment for Household dialog is active. It will have a mnemonic of “S”.

8.2.2.8 Delete Appointment Menu Item

The menu item will be available when the Schedule Appointment for Household dialog is active and an appointment has been selected. It will have a mnemonic of "E".

8.2.2.9 Exit Menu Item

The menu item will be available when the Schedule Appointment for Household dialog is active. It will have a mnemonic of "X".

8.2.3 Menu Item Processes

8.2.3.1 Change Appointment Type

Upon selection of the Change Appointment Type menu item, the system will set control to the Appointment Type dropdown.

8.2.3.2 Change Clinic

Upon selection of the Change Clinic menu item, the system will set control to the Clinic dropdown.

8.2.3.3 Change Date

Upon selection of the Change Date menu item, the system will set control to the Month dropdown.

8.2.3.4 Change Duration

Upon selection of the Change Duration menu item, the system will set control to the Duration dropdown.

8.2.3.5 Change Member

Upon selection of the Change Member menu item, the system will set control to the Household Member dropdown.

8.2.3.6 Refresh Appointment Grid

Upon selection of the Refresh Appointment Grid menu item, the system will refresh the information in the Scheduled Appointment Display grid.

8.2.3.7 Schedule Appointment

Upon selection of the Schedule Appointment menu item, the system will set the control to the Scheduled Appointment Display grid and process as if the OK button has been selected.

8.2.3.8 Delete Appointment

Upon selection of the Delete Appointment menu item, the system will set the control to the Scheduled Appointment Display grid and process as if the Delete button has been selected.

8.2.3.9 Exit

Upon selection of the Exit menu item, the system will exit the dialog and return control to the calling window.

8.2.4 Controls

8.2.4.1 Monthly Calendar

The Monthly Calendar will be enabled when the Schedule Appointments for Household dialog is active. It will display the month that matches the Month and Year dropdowns plus the following three months. The caption will display the Month and Year for the currently selected schedule.

The minimum date that can be displayed is the current system date and the maximum date that can be displayed is the last day of the current month plus one year. The calendar is color-coded to indicate the schedule availability as follows:

- Holidays: Red
- Business days: Yellow
- Currently selected date: Blue
- Non-business days or days not defined: Gray
- Current system date: Green

Upon a change in the date selected on the calendar, the values in the Schedule Appointment display grid will be refreshed.

8.2.4.2 Month Dropdown

The dropdown will be enabled when the Schedule Appointments for Household dialog is active. It will contain an entry for each month of the year in month order. Upon a change in the month selected, the values in the Monthly Calendar and Schedule Appointments display grid will be refreshed.

8.2.4.3 Year Dropdown

The dropdown will be enabled when the Schedule Appointments for Household dialog is active. It will contain an entry for the current year and the next year. Upon a change in the year selected, the values in the Monthly Calendar and Schedule Appointments display grid will be refreshed.

8.2.4.4 Clinic Dropdown

The Clinic dropdown will be enabled when the Schedule Appointments for Household dialog is active. It will contain an entry for each Clinic in the ServiceSite entity associated with the selected Agency. It will display as 'ServiceSiteID-ServiceSiteName'. Upon a change in the Clinic selected, the values in the Monthly Calendar and Schedule Appointments display grid will be refreshed.

8.2.4.5 Household Member Dropdown (Member)

The Household Member dropdown will be enabled when the Schedule Appointments for Household dialog is active. It will display a list of Members from the Member table, associated with the same HouseholdID and currently selected AgencyID. It will display as StateWICID – LastName, FirstName MI.

8.2.4.6 Appointment Type Dropdown (Appt Type)

The Appointment Type dropdown will be enabled when the Schedule Appointments for Household dialog is active. It will display a list of appointment types defined in the AppointmentType entity that are either system defined or defined for the currently selected AgencyID. Upon a change in the selection in the dropdown, the value in the Duration control will be updated to the default value for the selected Appointment Type.

8.2.4.7 Duration dropdown

The Duration dropdown will be enabled when the Schedule Appointments for Household dialog is active. It will contain a list of duration times from 5 minutes to 120 minutes in 5-minute increments.

8.2.4.8 WIC Category Dropdown

The WIC Category dropdown will be enabled when the Schedule Appointments for Household dialog is active. It will contain a list of WIC Categories from the WICStatus entity.

8.2.4.9 Contact Type Radio Button Group

The radio button group will be enabled when the Schedule Appointment for Household dialog is active. The radio button group consists of the following radio buttons:

- In person
- By phone

8.2.4.10 Comments Text Box

The text box will be enabled when the Schedule Appointment for Household dialog is active. When the text exceeds the bounds of the text box a vertical scroll bar will display.

8.2.4.11 View By Dropdown

The View By dropdown will be enabled when the Schedule Appointments for Household dialog is active. It will have increments of time, of “5 Minutes”, “15 Minutes”, “1/2 Hour”, or “Hour”. When the dropdown is changed the Schedule Appointments Display grid will change its view to show the appointments in increments of 5 minutes, 15 minutes, 1/2 hour, or hour.

8.2.4.12 Notes Button

The Notes button will be enabled whenever the day selected in the Monthly Calendar has an associated note. It has a mnemonic of “N”.

8.2.4.13 Delete Appointment Button (Delete Appt)

The Delete Appointment button will be enabled when the Schedule Appointments for Household dialog is active and an appointment has been selected from the Scheduled Appointments display grid. It has a mnemonic of “E”.

8.2.4.14 OK Button

The OK button will be enabled when the Schedule Appointments for Household dialog is active and the day is defined as a business day. Characteristics for the OK button are defined in *Consistencies*.

8.2.4.15 Close Button

The Close button will be enabled when the Schedule Appointments for Household dialog is active. Characteristics for the Close button are defined in *Consistencies*.

8.2.4.16 Schedule Appointments Display Grid

The display grid will be enabled when the Schedule Appointments for Household dialog is active. The grid header will display the date selected in the Monthly Calendar. The values on the grid are read-only. The grid will display the appropriate number of columns calculated from the resources scheduled for the selected Clinic and selected business day defined in the ResourceSchedule and AppointmentSource entities (Refer to Central Administrative Site *Chapter 02 - Build Master Calendar*). The column headings will display the value entered into AppointmentResource.Name. The grid displays values using the color-coding described for the Legend. When the View By value is set to 15 Minutes, the entire business day will display in the Schedule Appointments display grid.

Each resource column will contain all appointments for the selected date for each Resource and all scheduled appointments for the selected date per resource in the defined color-coded fashion (see Legend). The information displayed for each appointment will contain Member.LastName, Member.FirstName, Member.MiddleInitial, (Appointment.WICStatus) (in parenthesis) plus [AppointmentType.Description] (in brackets) where the AppointmentType.AppointmentTypeID is associated with the Appointment.AppointmentTypeID.

If scheduled for the selected date, the appointment grid will also display the Group Education Class scheduled for the associated resource.

Selecting a cell in the Schedule Appointment display grid sets the Appointment Start Time for creating new appointments or selects an existing appointment for deletion.

Double-clicking a cell in the Schedule Appointment display grid sets the appointment time for the selected resource and invokes the [Confirm Appointment Schedule](#) dialog in the next section.

8.2.4.17 Legend

The Legend displays the color-coding and descriptions for the Schedule Appointments Display grid. The colors and descriptions are as follows:

- White: Available
- Grey: Not Available
- Green: Initial Certification
- Blue: Subsequent Cert
- Orange: Medical Update
- Yellow: Other
- Red: Overbook

Note that this control does not receive focus and is not included in the tab order of this dialog.

8.2.5 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Schedule Appointments for Household dialog.

8.2.5.1 Initializing the Interface

Upon initial presentation of the Schedule Appointments for Household dialog the following values are displayed:

- Upon initial display, set the title bar text to “Schedule Appointments for Household” plus the (Household.HouseholdID) (in parenthesis).
- The Monthly Calendar will display the calendar for the current month and year plus the next three calendar months.
- The Monthly Calendar will initially select the current system day.
- The Monthly Calendar will color-code the calendar as defined in the Controls section of this dialog for Schedule Appointments for Household Monthly Calendar.
- The Date Month dropdown will initially display the current month
- The Date Year dropdown will initially display the current year
- The Clinic dropdown will initially display the currently selected Clinic (selected by the user on the login screen).
- The Member dropdown will display the currently selected Member.StateWICID – Member.LastName, Member.FirstName Member.MiddleInitial.
- The Appt Type dropdown will initially display the first selection in the list.
- The Duration dropdown will initially display the default value for the Appointment Type initially displayed.
- The WIC Category dropdown will display the currently selected Member.WICStatus.
- The In person radio button in the Contact Type radio button group is initially selected.
- The Comments text box will initially be blank.
- The View By dropdown will initially display the value 15 Minutes.
- The Scheduled Appointments display grid generates and displays columns for all scheduled resources for the current system date.
- The Scheduled Appointments display grid will display all appointments and group classes scheduled in the appropriate columns for the current system date.
- The Scheduled Appointments display grid will display the entire business day from start time to end time inclusively.

8.2.5.2 Edits

Upon selection of the OK button, if a selection is not made in the following:

- Monthly Calendar
- Clinic dropdown
- Household Member dropdown
- Appointment Type dropdown
- Duration dropdown
- WIC Category dropdown
- Contact Type radio button group

The system will invoke a standard error message with the text “A selection is required in the {control label}”.

If the day selected in the Monthly Calendar is not defined as a business day, an error message is displayed: “Invalid date entered.”

If the appointment time is before the current time, the system will invoke a standard error message with the text “The appointment time cannot be before the current time”.

If there is an appointment already scheduled for the selected participant for this time, the system will invoke a standard error message with the text: “Participant <Last Name, First Name> has appointments scheduled during the time you have selected, <Starting time> - <Ending time> on <Date>.”

If there is a class already scheduled for this time, the system will invoke a standard error message with the text “Participant <Last Name, First Name> has been enrolled in a Group Education Class during the time you have selected, <Starting time> - <Ending time> on <Date>. Do you want to continue scheduling this appointment?” with Yes and No buttons.

- Select ‘Yes’, the appointment is scheduled.
- Select ‘No’, the appointment is not scheduled.

If the selected appointment time is not available, the system will invoke a standard error message with the text “Resource <ResourceName> is not scheduled during the time you have selected, <Starting time> - <Ending time> on <Date>.”

If the selected resource is already scheduled for this time, the system will invoke a standard error message with the text “Resource <ResourceName> has other appointments scheduled during the time you have selected, <Starting time> - <Ending time> on <Date>. Continuing will cause the Resource to be overbooked.”

If the selected resource is already for a class for this time, the system will invoke a standard error message with the text “Resource <ResourceName> has a Group Education Class scheduled during the time you have selected, <Starting time> - <Ending time> on <Date>. Continuing will cause the Resource to be overbooked.”

8.2.5.3 Saving the Data

Upon successful completion of data validation, the system will display the Confirm Appointment Schedule message dialog as described in the next section of this document.

8.2.5.4 Delete Appointment

Upon selection of the Delete Appointment button, the system will verify permissions for the currently logged-on user. If the user does not have the appropriate permissions (Appointments.Full Control) to delete an appointment, the system will invoke a standard error message with the text “You do not have the necessary permissions to delete an appointment. Please see the system administrator.”

Upon selection of the Delete Appointment button, the system will proceed as follows depending on the type of appointment selected in the Scheduled Appointments display grid.

If the selected appointment is not a group education class, the system will invoke a standard warning message with the text “Do you want to delete the appointment scheduled on {appointment date} at {appointment time}?” The options of Yes and No are displayed

- Select ‘Yes’
 - The system will delete the selected appointment and allow the time to be reused.
 - The contents of the Scheduled Appointments display grid will be refreshed.
- Select ‘No’
 - The system will return to the Schedule Appointments dialog without deleting the appointment.

If the selected appointment is a group education class, the system will invoke a standard warning message with the text “Do you want to cancel the enrollment in the group education class scheduled on {class date} at {class time}?” The options of Yes and No will be available.

- Select ‘Yes’
 - The system will delete the appointment from the APPOINTMENT and CLASS-ENROLLMENT entities.
 - The system will decrease the enrolled seats for the group education class to allow those seats to be reused.

- The contents of the Scheduled Appointments display grid will be refreshed.
- Select 'No'
 - The system will return to the Scheduled Appointments dialog.

8.3 Confirm Scheduled Appointment

When an appointment is scheduled, a confirmation message appears to the user. This message allows the user to confirm the appointment or to reject it.

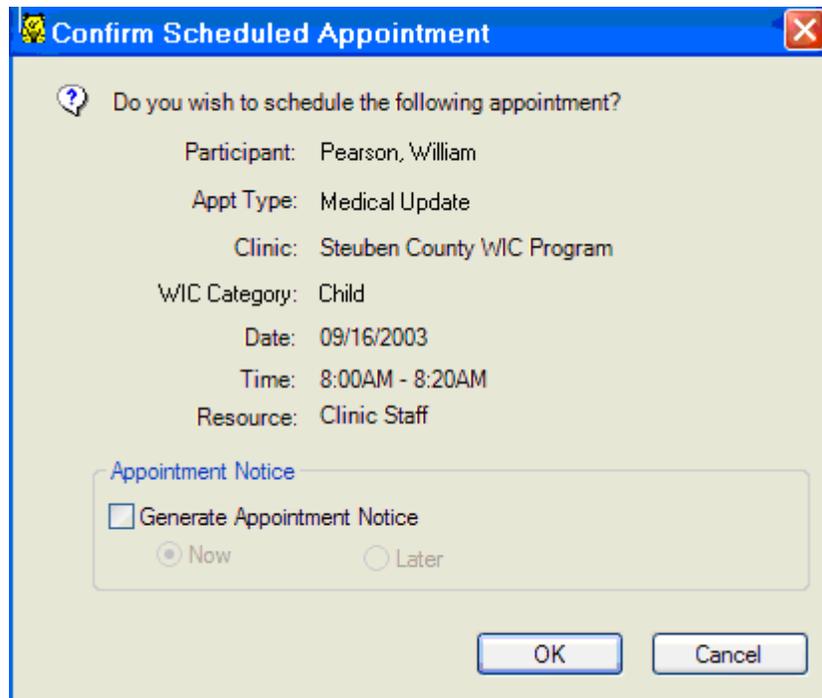


Figure 3 – Confirm Scheduled Appointment Dialog

8.3.1 Controls

8.3.1.1 Confirmation Message label

The label control will be enabled when the Confirm Scheduled Appointment message dialog is active. The message and value labels are defined in the processing section (see *Initializing the Interface* in the Processing section for this dialog). Note that this control does not receive focus and is not included in the tab order of this dialog.

8.3.1.2 Generate Appointment Notice Check Box

The Generate Appointment Notice check box will be enabled when the Confirm Scheduled Appointment message dialog is active.

8.3.1.3 When to Generate Notice Radio Button Group

The radio button group will be enabled when the Generate Appointment Notice check box is marked and the other output printer is selected (refer to *System Tools*.) The radio button group consists of the following radio buttons:

- Now
- Later

Upon selection of the Generate Appointment Notice check box, if there is no printer defined for the Other Output Printer (refer to *System Tools*) the system will disable the When to Generate Notice Radio Button Group and automatically select the Later radio button.

8.3.1.4 OK button

The button will be enabled when the Confirm Scheduled Appointment message dialog is active (see *Saving the Data* in the Processing section for Confirm Appointment Selection). Characteristics for the OK button are defined in *Consistencies*.

8.3.1.5 Cancel button

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

8.3.2 Processes

8.3.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Confirm Scheduled Appointment”

The confirmation message text, “Do you wish to schedule the following appointment?” is displayed.

The Appointment information will be displayed as follows from information entered on the Schedule Appointments for Household dialog:

- Participant label and value displays “Participant: <Member.LastName, Member.FirstName Member.MiddleInitial>”
- Appointment Type label and value displays “Appt Type:” + <AppointmentType.Description>
- Clinic Label and value displays “Clinic:” + <ServiceSite.Name>
- WIC Category and value displays “WIC Category:” + <Appointment.WICStatus>
- Date Label and value displays “Date:” + Appointment.AppointmentDate

- Time Label and value displays “Time:” + Appointment.AppointmentTime
- Resource Label and value displays “Resource:” + AppointmentResource.Name

The Generate Appointment Notice check box is initially blank.

The When to Generate Notice radio button group is initially disabled.

The Now radio button in the When to Generate Notice radio button group is initially selected.

8.3.2.2 Appointment Notice Processing

Upon selecting the OK button, if the Generate Appointment Notice checkbox is selected and the ‘Now’ radio button is selected, the system will display the Generate Appointment Notice dialog (see *Generate Appointment Notice* described later in this document). The system then saves the appointment. (see *Saving the Data* for this dialog)

If the Generate Appointment Notice checkbox is selected and the ‘Later’ radio button is selected, the system sets the Appointment.QueuedNotice value equal to ‘Y’ and the system saves the appointment. (see *Saving the Data* for this dialog)

If the check box for Generate Appointment Notice was not selected, the system saves the appointment. (see *Saving the Data* for this dialog)

8.3.2.3 Saving the Data

When the OK button is selected, the system schedules the appointment at the specified date and time for the specified household member, appointment type, duration, and resource in the APPOINTMENT entity.

If an appointment time and resource were not selected in the grid, the system will automatically select the next available appointment time and resource in the grid.

If the Generate Appointment Notice Now is selected, the Appointment Notice the system will display the Generate Appointment Notice dialog (see *Generate Appointment Notice* described later in this document).

If the Generate Appointment Notice checkbox and ‘Later’ radio button is selected, the Appointment.QueuedNotice value is set to ‘Y’.

The system returns to the Schedule Appointment for Household dialog as described previously in this document.

The Scheduled Appointments display grid is refreshed to display the newly created appointment.

Focus remains on the current dialog.

8.3.2.4 Cancel

Upon selection of the Cancel button, the system returns to the Schedule Appointment for Household dialog without saving the appointment.

8.3.2.5 Data Map

Control Label	Entity	Attribute	Business Rule
Participant	APPOINTMENT	STATEWICID	
Appt Type	APPOINTMENT	APPOINTMENTTYPEID	
Clinic	APPOINTMENT	SERVICESITEID	
WIC Category	APPOINTMENT	WICSTATUS	
Date	APPOINTMENT	APPOINTMENTDATE	
Time	APPOINTMENT	APPOINTMENTTIME	
Resource	APPOINTMENT	RESOURCEID	
Generate Appointment Notice (later)	APPOINTMENT	QUEUEDNOTICE	

8.4 Schedule Group Education Class for Household

The Schedule Group Education Class for Household dialog allows the user to manually enroll a household member in a group education class. This dialog is invoked when the user selects the Schedule Group Class button on the Select Appointment to Schedule dialog.

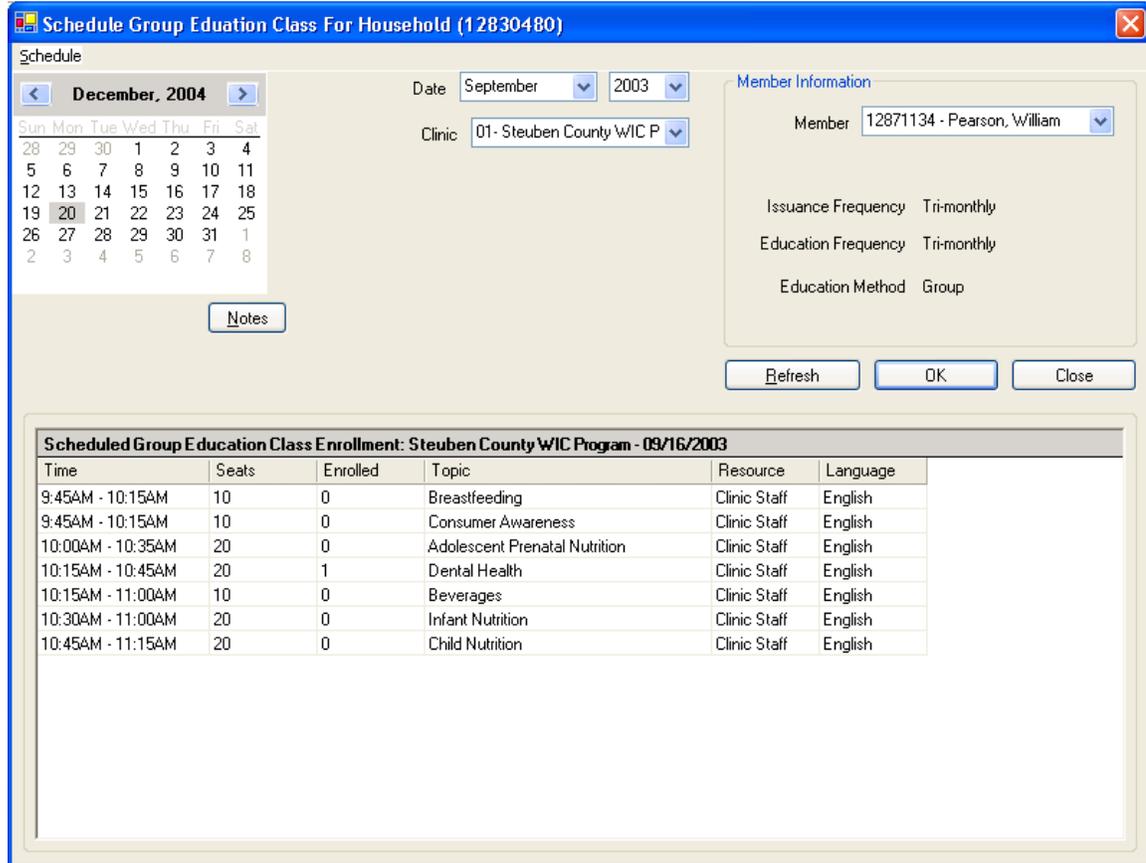


Figure 4 - Schedule Group Education Class for Household Dialog

8.4.1 Schedule Menu

The Schedule menu will be enabled when the Schedule Group Education Class for Household dialog is active. It will have a mnemonic of “S”. It will display the following Menu Items:

- Change Clinic
- Change Date
- Change Member
- Refresh Class Grid
- Schedule Enrollment
- Exit

8.4.2 Menu Items

8.4.2.1 Change Clinic Menu Item

The menu item will be available when the Schedule Group Education Class for Household dialog is active. It will have a mnemonic of "L".

8.4.2.2 Change Date Menu Item

The menu item will be available when the Schedule Group Education Class for Household dialog is active. It will have a mnemonic of "D".

8.4.2.3 Change Member Menu Item

The menu item will be available when the Schedule Group Education Class for Household dialog is active. It will have a mnemonic of "M".

8.4.2.4 Refresh Class Grid Menu Item

The menu item will be available when the Schedule Group Education Class for Household dialog is active. It will have a mnemonic of "R".

8.4.2.5 Schedule Enrollment Menu Item

The menu item will be available when the Schedule Group Education Class for Household dialog is active. It will have a mnemonic of "S".

8.4.2.6 Exit Menu Item

The menu item will be available when the Schedule Group Education Class for Household dialog is active. It will have a mnemonic of "X".

8.4.3 Select Menu Item Processes

8.4.3.1 Change Clinic

Upon selection of the Change Clinic menu item, the system will set control to the Clinic dropdown.

8.4.3.2 Change Date

Upon selection of the Change Date menu item, the system will set control to the Month dropdown.

8.4.3.3 Change Member

Upon selection of the Change Member menu item, the system will set control to the Household Member dropdown.

8.4.3.4 Refresh Class Grid

Upon selection of the Refresh Class Grid menu item, the system will refresh the information in the Scheduled Group Education Classes Display grid.

8.4.3.5 Schedule Enrollment

Upon selection of the Schedule Enrollment menu item, the system will set the control to the Scheduled Group Education Classes Display grid and process as if the OK button has been selected.

8.4.3.6 Exit

Upon selection of the Exit menu item, the system will exit the dialog and return control to one of the following:

- If the Select Appointment to Schedule dialog was invoked from the Applicant Prescreening dialog, the system will return the user to the Participant List.
- If the Select Appointment to Schedule dialog was invoked from the Schedule Appointment menu item on the Participant Activities menu, the system will return the user to the Participant Folder.
- If the Select Appointment to Schedule dialog was invoked from the Schedule Appointment button on the Participant Folder toolbar, the system will return the user to the Participant Folder.
- If the Select Appointment to Schedule dialog was invoked from the Applicant is Certified dialog from Certification Guided Script, the system will return the user to the Participant Folder.

8.4.4 Controls

8.4.4.1 Monthly Calendar

The monthly calendar will be enabled when the Schedule Group Education Class for Household dialog is active. It will display the month that matches the Month and Year dropdowns. The user can select a day with which to work in the monthly calendar. The caption will display the Month and Year for the currently selected schedule. The minimum date allowed is the current system date and the maximum date allowed is the last day of the current month plus one year. The calendar is color-coded to indicate the schedule availability as follows:

- Holidays: Red
- Business days: Yellow

- Currently selected date: Blue
- Non-business days or days not defined: Gray
- Current system date: Green

Upon a change in the date selected on the calendar, the values in the Scheduled Group Education Classes display grid will be refreshed.

8.4.4.2 Month Dropdown

The dropdown will be enabled when the Schedule Group Education Class for Household dialog is active. It will display each month of the year in month order. Upon a change in the month selected, the values in the Monthly Calendar and Schedule Group Education Class display grid will be refreshed.

8.4.4.3 Year Dropdown

The dropdown will be enabled when the Schedule Group Education Class for Household dialog is active. It will contain an entry for the current year and the next year. Upon a change in the year selected, the values in the Monthly Calendar and Schedule Group Education Class display grid will be refreshed.

8.4.4.4 Clinic Dropdown

The dropdown will be enabled when the Schedule Group Education Class for Household dialog is active. It will contain an entry for each Clinic in the ServiceSite entity associated with the selected Agency. It will display as 'ServiceSiteID-ServiceSiteName'. Upon a change in the Clinic selected, the values in the Monthly Calendar and Schedule Group Education Class display grid will be refreshed.

8.4.4.5 Household Member Dropdown (Member)

The Household Member dropdown will be enabled when the Schedule Group Education Class for Household dialog is active. It will display a list of Members from the Member table, associated with the same HouseholdID and currently selected AgencyID. It will display as StateWICID – LastName, FirstName MI. Upon a change of member in the dropdown, the Issuance Frequency, Education Frequency and Education Method value labels will be refreshed in the Member Information frame.

8.4.4.6 Issuance Frequency Text and Value Label

The value label will be enabled when the Schedule Group Education Class for Household dialog is active. It will display the Description from the ReferenceDictionary entity where Category = 'ISSUEFREQ' and the ExternalID = the value in Member.IssuanceFrequency for the selected Member.StateWICID. It will display in the inverse color of the form. Upon a change in the Member dropdown, the value label will be refreshed. Note that this control does not receive focus and is not included in the tab order of this dialog.

8.4.4.7 Education Frequency Text and Value Label

The value label will be enabled when the Schedule Group Education Class for Household dialog is active. It will display the Description from the ReferenceDictionary entity where Category = 'FLLWUPFREQ' and the ExternalID = the value in Member.FollowUpFrequency for the household member selected in the Member dropdown. It will display in the inverse color of the form. Upon a change in the Member dropdown, the value label will be refreshed. Note that this control does not receive focus and is not included in the tab order of this dialog.

8.4.4.8 Education Method Text and Value Label

The value label will be enabled when the Schedule Group Education Class for Household dialog is active. It will display the Description from the ReferenceDictionary entity where Category = 'NEMETHOD' and the ExternalID = the value in Member.FollowUpMethod for the household member selected in the Member dropdown. It will display in the inverse color of the form. Upon a change in the Member dropdown, the value label will be refreshed. Note that this control does not receive focus and is not included in the tab order of this dialog.

8.4.4.9 Scheduled Group Education Classes Display Grid (Scheduled Classes)

The display grid will be enabled when the Schedule Group Education Class for Household dialog is active. The grid header will display the read-only text "Scheduled Group Education Class Enrollment:" plus ServiceSite.ServiceSiteName plus the date selected in the Monthly Calendar. It consists of the following columns and values:

- Time
- Seats (Maximum)
- Enrolled (Seats)
- Topic (Group Topic)
- Resource
- Language

The grid will display the values from the ClassSchedule and ClassType entities for the date selected in the Group Education Class monthly calendar. The entries in the grid will be sorted in chronological order by the Class-Time attribute. The values on the grid are read-only. A single selection may be made by the user. Double-clicking on an entry in the grid sets the time for the selected class.

8.4.4.10 Notes Button

The Notes button will be enabled whenever the day selected in the Group Education Class Monthly calendar has a note associated with it. It has a mnemonic of “N”.

8.4.4.11 Refresh Button

The Refresh button will be enabled when the Schedule Group Education Class for Household dialog is active. It has a mnemonic of “R”.

8.4.4.12 OK Button

The OK button will be enabled when the Schedule Group Education Class for Household dialog is active and a group class has been scheduled for the business day. Characteristics for the OK button are defined in *Consistencies*.

8.4.4.13 Close Button

The Close button will be enabled when the Schedule Group Education Class for Household dialog is active. Characteristics for the Close button are defined in *Consistencies*.

8.4.5 Processes

8.4.5.1 Initializing the Interface

Upon initial presentation of the Schedule Group Education Class for Household dialog the following values are displayed:

- Upon initial display, set the title bar text to “Schedule Group Education Class for Household” plus the (Household.HouseholdID) (in parenthesis).
- The Monthly Calendar will display the calendar for the current month and year.
- The Monthly Calendar will initially select the current system day.
- The Monthly Calendar will color-code the calendar as defined in the Controls section of this dialog for Schedule Group Education Class Monthly Calendar.
- The Date Month dropdown will initially display the current month.

- The Date Year dropdown will initially display the current year.
- The Clinic dropdown will initially display the selected Clinic (selected by the user on the login screen).
- The Member dropdown will display the selected Member information (Member.StateWICID – Member.LastName, Member.FirstName Member.MiddleInitial)
- The Issuance Frequency text value will initially display the selected member’s issuance frequency.
- The Education Frequency text value will initially display the selected member’s education frequency.
- The Education Method text value will initially display the selected member’s education method.
- The Scheduled Group Education Classes display grid initially displays the scheduled group classes for the current system date.

8.4.5.2 Edits

Upon selection of the OK button, if a selection is not made in the Household Member dropdown, the system will invoke a standard error message with the text “A selection is required in the {control label}”.

If a selection is not made in the Scheduled Group Education Classes display grid, the system will invoke a standard error message with the text “Please select a class from the grid.”

If the selected class is full, the system will invoke a standard error message with the text “The class you selected is already full.”

If the member has an appointment scheduled for this time, the system will invoke a standard error message with the text, “Participant <Last Name, First Name> has appointments scheduled during the time you have selected, <Starting time> - <Ending time> on <Date>. Do you want to continue scheduling this appointment?” with Yes and No buttons.

- Select ‘Yes’, the class is scheduled.
- Select ‘No’, the class is not scheduled.

If the member has a class scheduled for this time, the system will invoke a standard error message with the text “Participant <Last Name, First Name> has been enrolled in a Group Education Class during the time you have selected, <Starting time> - <Ending time> on <Date>.”

8.4.5.3 Saving the Data

Upon successful completion of data validation, the system will display the Confirm Class Enrollment message dialog as described in the next section of this document.

8.4.5.4 Refresh

Upon selection of the Refresh Class Grid menu item or Refresh button, the system will refresh the information in the Scheduled Group Education Classes Display grid.

8.5 Confirm Class Enrollment

When a group class is scheduled, a confirmation message appears to the user. This message allows the user to confirm the group class or to reject it.

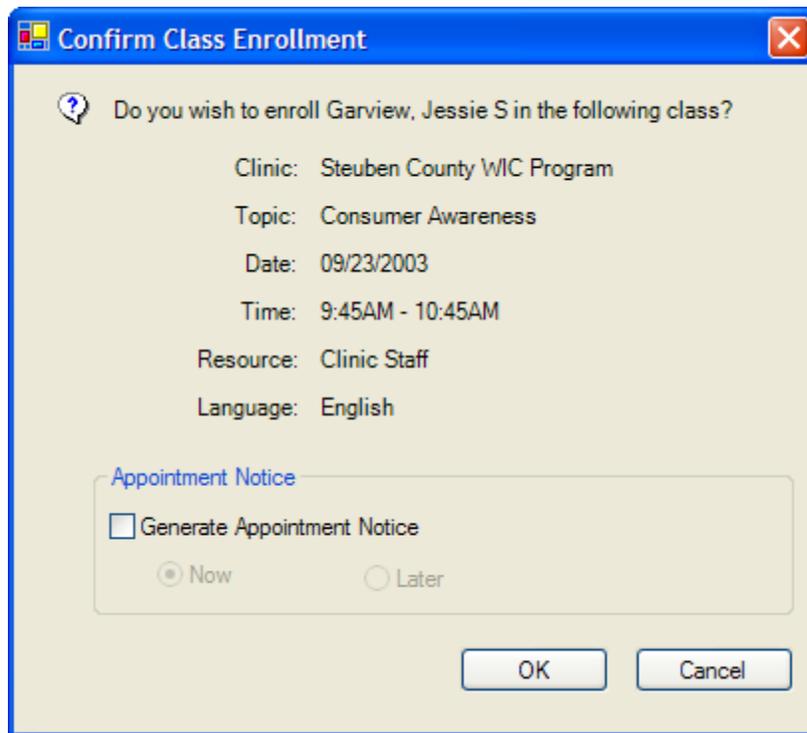


Figure 5 – Confirm Class Enrollment Message Dialog

8.5.1 Controls

8.5.1.1 Confirmation Message label

The label control will be enabled when the Confirm Class Enrollment Selection message dialog is active. The message and value labels are defined in the processing section (see *Initializing the Interface* in the Processing section for this dialog). Note that this control does not receive focus and is not included in the tab order of this dialog.

8.5.1.2 Generate Appointment Notice Check Box

The check box will be enabled when the Confirm Class Enrollment message dialog is active.

8.5.1.3 When to Generate Notice Radio Button Group

The radio button group will be enabled when the Generate Appointment Notice check box is marked and the other output printer is selected (refer to *System Tools*). The radio button group consists of the following radio buttons:

- Now
- Later

Upon selection of the Generate Appointment Notice check box, if there is no printer defined for the Other Output Printer (refer to System Tools) the system will disable the When to Generate Notice Radio Button Group and automatically select the Later radio button.

8.5.1.4 OK button

The button will be enabled when the Confirm Class Enrollment message dialog is active (see *Saving the Data* in the Processing section for Confirm Class Enrollment). Characteristics for the OK button are defined in *Consistencies*.

8.5.1.5 Cancel button

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

8.5.2 Processes

8.5.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Confirm Class Enrollment”

The confirmation message text, “Do you wish to enroll {Member.LastName, Member.FirstName Member.MiddleInitial} in the following class?” is displayed.

The class information will be displayed as follows from information entered on the Schedule Group Education for Household dialog:

- Clinic: <Clinic name>
- Topic: <Class Topic>
- Date: <Class Date>
- Time: <Class Time>
- Resource: <Class Resource>
- Language: <Class Language>

The Generate Appointment Notice check box is initially blank.

The When to Generate Notice radio button group is initially disabled.

The Now radio button in the When to Generate Notice radio button group is initially selected.

8.5.2.2 Appointment Notice Processing

Upon selecting the OK button, if the Generate Appointment Notice checkbox is selected and the 'Now' radio button is selected, the system will display the Generate Appointment Notice dialog (see *Generate Appointment Notice* described later in this document). The system then saves the appointment. (see *Saving the Data* for this dialog)

If the Generate Appointment Notice checkbox is selected and the 'Later' radio button is selected, the system sets the Appointment.QueuedNotice value equal to 'Y' and the system saves the appointment. (see *Saving the Data* for this dialog)

If the check box for Generate Appointment Notice was not selected, the system saves the appointment. (see *Saving the Data* for this dialog)

8.5.2.3 Saving the Data

When the OK button is selected, the system will enroll the household member in the selected group education class and schedule an appointment for the household member to attend the group education class.

The system will also increment the number of attendees in the ClassSchedule entity for the selected class and refresh the Schedule Group Education Class display grid.

The system will create a record in the ClassEnrollment entity.

If the Generate Appointment Notice Now is selected, the Appointment Notice the system will display the Generate Appointment Notice dialog (see *Generate Appointment Notice* described later in this document).

If the Generate Appointment Notice checkbox and 'Later' radio button is selected, the Appointment.QueuedNotice value is set to 'Y'.

The system will repopulate the controls on the Schedule Group Education Class for Household dialog as described earlier in this document.

The system will return to the Schedule Group Class for Household dialog.

8.5.2.4 Cancel

Upon selection of the Cancel button, the system returns to the Schedule Group Education Class for Household dialog without saving the class enrollment.

8.5.2.5 Data Map

Control Label	Entity	Attribute	Business Rule
Participant	CLASSENROLLMENT	STATEWICID	
Clinic	CLASSSCHEDULE	SERVICESITEID	
Topic	CLASSSCHEDULE	CLASSTYPEID	
Date	CLASSSCHEDULE	CLASSDATE	
Time	CLASSSCHEDULE	CLASSTIME	
Resource	CLASSSCHEDULE	RESOURCECOLU MN	
Language	CLASSSCHEDULE	LANGUAGE	
Generate Appointment Notice (later)	CLASSENROLLMENT	QUEUEDNOTICE	

8.6 View Appointments for Date

The View Appointments for Date dialog allows the user to view all the appointments for a specified date. Past appointment information can be viewed up to 60 days after the original appointment date. Appointments older than 90 days are purged from the system and are unavailable for viewing. This dialog is invoked when the user selects the View Appointments for Date menu item on the Activities menu described in *Clinic Chapter 06 - Search-Selection*.

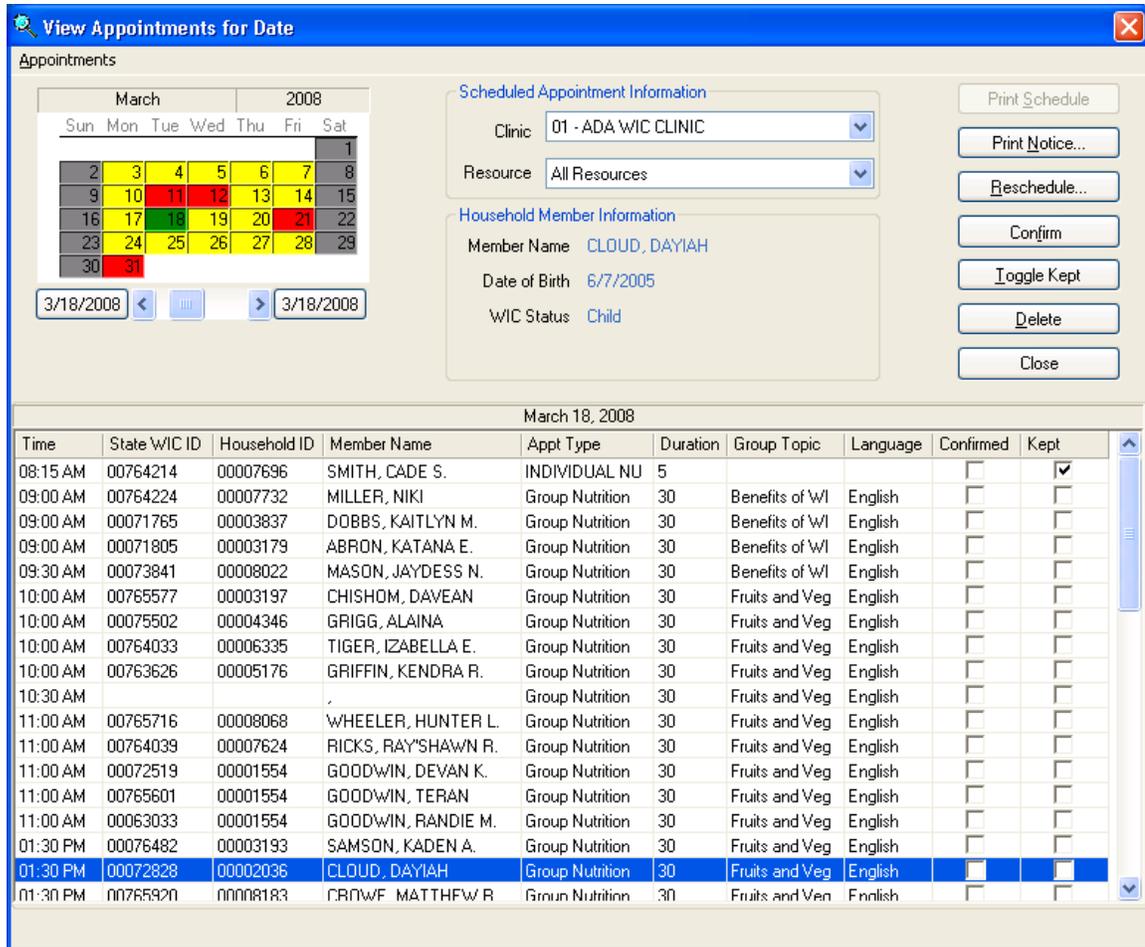


Figure 6 - View Appointments for Date Dialog

8.6.1 Appointments Menu

The Appointments menu will be enabled when the View Appointment for Date dialog is active. It will have a mnemonic of "A". It will display the following Menu Items:

- Print Schedule
- Print Appointment Notice

- Reschedule Appointment
- Confirm
- Toggle Kept
- Delete Appointment
- Close

8.6.2 Menu Items

8.6.2.1 *Print Schedule Menu Item*

The menu item will be enabled when the Appointments menu is active, a date is selected in the Appointments monthly calendar and the other output printer is selected (refer to *System Tools*). It has a mnemonic of “S”.

8.6.2.2 *Print Appointment Notice Menu Item*

The menu item will be enabled when the Appointments menu is active, an appointment or class enrollment is selected in the Scheduled Appointments display grid and the other output printer is selected (refer to *System Tools*). It has a mnemonic of “N”.

8.6.2.3 *Reschedule Appointment Menu Item*

The menu item will be enabled when the Appointments menu is active and an appointment or class enrollment is selected in the Scheduled Appointments display grid. It has a mnemonic of “R”.

8.6.2.4 *Confirm Menu Item*

The menu item will be enabled when the Appointments menu is active and one or more appointments are selected in the Scheduled Appointments display grid. It has a mnemonic of “F”. This menu item will allow multi-selection of participants in the Scheduled Appointments display grid.

8.6.2.5 *Toggle Kept Menu Item*

The menu item will be enabled when the Appointments menu is active and one or more appointments or class enrollments are selected in the Scheduled Appointments display grid. It has a mnemonic of “T”. This menu item will allow multi-selection of participants in the Scheduled Appointments display grid.

8.6.2.6 Delete Appointment Menu Item

The menu item will be enabled when the Appointments menu is active and an appointment or class enrollment is selected in the Scheduled Appointments display grid. It has a mnemonic of “D”.

8.6.2.7 Close Menu Item

The menu item will be enabled when the Appointments menu is active. It has a mnemonic of “C”.

8.6.3 Select Menu Item Processes

8.6.3.1 Print Schedule

Upon selection of the Print Schedule menu item, the system will generate the Appointments for Date Listing Report (see *Appointments for Date Listing Report* section of this document).

8.6.3.2 Print Appointment Notice

Upon selection of the Print Appointment Notice menu item, the system will proceed as described in processing for Print Notice (see *Print Notice* in the Processing section for this dialog).

8.6.3.3 Reschedule Appointment

Upon selection of the Reschedule Appointment menu item, the system will proceed as described in processing for Reschedule Appointment. (see *Reschedule Appointment* in the Processing section for this dialog).

8.6.3.4 Confirm

Upon selection of the Confirm menu item, the system will confirm the selected appointment(s). (see *Confirm Appointment* in the Processing section for this dialog).

8.6.3.5 Toggle Kept

Upon selection of the Toggle Kept menu item, the system will mark the appointment as kept. (see *Toggle Kept* in the Processing section for this dialog).

8.6.3.6 Delete

Upon selection of the Delete menu item, the system will proceed as described for processing of the Delete button (see *Delete Appointment* in the Processing section for this dialog).

8.6.3.7 Close

Upon selection of the Close menu item, the system will close the View Appointments for Date dialog and return to the Participant List window.

8.6.4 Controls

8.6.4.1 View Appointments for Date Monthly calendar

The monthly calendar will be enabled when the View Appointments for Date dialog is active. The caption will display the Month and Year for the currently selected schedule. The user can select a day by clicking on a date in the calendar.

The button in the lower left-hand corner of the control displays the current system date. Selecting this button will change the calendar to the current month with focus on the current system date. The button in the lower right-hand corner of the control displays the currently selected date; upon selecting this button the control will display the month containing that date. The scroll bar between the dates will advance or decrease the calendar by one month.

The minimum date allowed is sixty (60) days prior to the current system date and maximum date allowed is the last day of the current month plus one year. The calendar is color-coded to indicate the schedule availability as follows:

- Holidays: Red
- Business days: Yellow
- Currently selected date: Blue
- Non-business days or days not defined: Gray
- Current system date: Green

Upon a change in the date selected on the monthly calendar, the values on the Scheduled Appointments display grid will be refreshed and the Household Member Information cleared.

8.6.4.2 Clinic Dropdown

The dropdown will be enabled when the View Appointments for Date dialog is active. It will display a list of clinics defined in the ServiceSite entity associated with the selected AgencyID. Upon a change of Clinic, the values on the Scheduled Appointments display grid will be refreshed and the Household Member Information cleared.

8.6.4.3 Resource Dropdown

The dropdown will be enabled when the View Appointments for Date dialog is active and one or more resources are defined for the Clinic. It will display the values defined for the Clinic in the AppointmentResources entity for the selected AgencyID plus the entry “All resources” to allow the user to view the combined schedule for all appointment resources. Upon a change of the entry selected in the dropdown, the values on the Scheduled Appointments display grid will be refreshed and the Household Member Information cleared.

8.6.4.4 Member Name Text and Value Label

The value label will display the Member.LastName, Member.FirstName, and Member.MiddleInitial from the selected appointment in the Scheduled Appointments display grid. It will display in the inverse color of the form. If multiple appointments are selected in the Scheduled Appointments display grid, the values from the first appointment selected will be displayed.

8.6.4.5 Date of Birth Text and Value Label

The value label will display the Member.BirthDate from the selected appointment in the Scheduled Appointments display grid. It will display in the inverse color of the form. If multiple appointments are selected in the Scheduled Appointments display grid, the value from the first appointment selected will be displayed.

8.6.4.6 WIC Category Text and Value Label

The value label will display the Member.WICStatus from the selected appointment in the Scheduled Appointments display grid. It will display in the inverse color of the form. If multiple appointments are selected in the Scheduled Appointments display grid, the value from the first appointment selected will be displayed.

8.6.4.7 High Risk Text

The text “High Risk” will display in red if the Member.HighRisk value = ‘Y’ for the selected member in the appointment in the Scheduled Appointments display grid. If multiple appointments are selected in the Scheduled Appointments display grid, the value of the first appointment selected will be displayed.

8.6.4.8 Print Schedule Button

The Print Schedule button will be enabled when a date is selected in the Appointments monthly calendar and the other output printer is selected (refer to *System Tools*). It has a mnemonic of “S”.

8.6.4.9 Print Notice Button

The Print Notice button will be enabled when an appointment or class enrollment is selected in the Scheduled Appointments display grid and the other output printer is selected (refer to *System Tools*). It has a mnemonic of “N”. This control will only allow one participant to be selected in the Scheduled Appointments display grid.

8.6.4.10 Reschedule Button

The Reschedule button will be enabled when an appointment or class enrolment is selected in the Scheduled Appointments display grid. It has a mnemonic of “R”.

8.6.4.11 Confirm Button

The Confirm button will be enabled when a selection is made in the Scheduled Appointments display grid and the appointment type is not a group education class. It has a mnemonic of “F”.

8.6.4.12 Toggle Kept Button

The Toggle Kept button will be enabled when a selection is made in the Scheduled Appointments display grid. It has a mnemonic of “T”.

8.6.4.13 Delete Button

The Delete button will be enabled when a selection is made in the Scheduled Appointments display grid. It has a mnemonic of “D”.

8.6.4.14 Close Button

The Close button will be enabled when the View Appointments for Date dialog is active. Characteristics for the Close button are defined in *Consistencies*. It has a mnemonic of “C”.

8.6.4.15 Scheduled Appointments Display Grid

The display grid will be enabled when the View Appointments for Date dialog is active. The grid header will display the read-only text of the date selected in the Monthly Calendar. The grid consists of the following columns:

- Time
- State WIC ID
- Household ID
- Member Name
- Appt Type
- Duration
- Group Topic
- Language
- Confirmed
- Kept

An entry will be added to the grid for each appointment scheduled for the selected date. The entries will be sorted in chronological order by Time. The values on the grid are read-only. The grid allows selection of single or multiple records.

8.6.5 Processes

8.6.5.1 Initializing the Interface

Upon initial presentation of the View Appointments for Date dialog the following values are displayed:

- Upon initial display, set the title bar text to “View Appointments for Date”.
- The Monthly Calendar will display the calendar for the current month and year.
- The Monthly Calendar will initially select the current system day.
- The system will color-code the calendar as defined for View Appointments for Date Monthly Calendar in the Controls section of this dialog.
- The Clinic dropdown will initially display the currently selected Clinic (selected by the user on the login screen).
- The Resource dropdown will initially display “Clinic Staff”.
- The Member Name value label will initially be blank
- The Date of Birth value label will initially be blank
- The WIC Category value label will initially be blank
- The Scheduled Appointments display grid will display all appointments and group classes scheduled in the appropriate columns for the current system date.

8.6.5.2 Print Schedule

Upon selection of the Print Schedule button, the system will generate the Appointments for Date Listing Report (see *Appointments for Date Listing Report* section of this document).

8.6.5.3 Print Notice

Upon selection of the Print Notice button and if more than one record is selected in the Scheduled Appointments display grid, the system will invoke a standard error message with the text, "More than one item has been selected. Please select a single item for this option."

Upon selection of the Print Notice button, the system will invoke the Generate Appointment Notice dialog (see Generate Appointments Notice section of this document).

8.6.5.4 Reschedule Appointment

If the user does not have the appropriate permissions (Appointments.Full Control) to reschedule an appointment, the system will invoke a standard error message with the text "You do not have the necessary permissions to reschedule an appointment. Please see the system administrator."

If multiple appointments are selected in the Scheduled Appointments display grid, upon selection of the Reschedule button, the system will invoke a standard error message with the text "More than one item has been selected. Please select a single item for this option."

If the selected appointment is not a group education class, upon selection of the Reschedule button, the system will invoke the Reschedule Appointment dialog (see Reschedule Appointment for Household as described later in this document).

If the selected appointment is a group education class, upon selection of the Reschedule button, the system will invoke the Reschedule Group Class for Household dialog (see Reschedule Group Education Class for Household as described later in this document).

8.6.5.5 Confirm Appointment

Upon selection of the Confirm button the system will set the Appointment.Confirmed value to 'Y'. The contents of the Scheduled Appointments display grid will then be refreshed and the Confirmed column check box for the selected appointment will be checked.

8.6.5.6 Toggle Kept

Upon selection of the Toggle Kept button:

- If the selected appointment is not a group education class the system will check the current Appointment.AppointmentKept value and toggle it from 'Y' to 'N' or from 'N' to 'Y'. The contents of the Scheduled Appointments display grid will then be refreshed.

- If the selected appointment is a group education class the system will check the current `ClassEnrollment.EnrollmentKept` value and toggle it from 'Y' to 'N' or from 'N' to 'Y'. The contents of the Scheduled Appointments display grid will then be refreshed.

8.6.5.7 Delete Appointment

Upon selection of the Delete button, the system will verify permissions for the currently logged-on user. If the user does not have the appropriate permissions (`Appointments.Full Control`) to delete an appointment, the system will invoke a standard error message with the text “You do not have the necessary permissions to delete an appointment. Please see the system administrator.”

If multiple appointments are selected in the Scheduled Appointments display grid, then an error message will be displayed with the text “More than one item has been selected. Please select a single item for this option.”

Upon selection of the Delete button, the system will proceed as follows depending on the type of appointment selected in the Scheduled Appointments display grid.

If the selected appointment is not a group education class, the system will invoke a standard warning message with the text “Do you want to delete the appointment scheduled on {appointment date} at {appointment time}?” The options of Yes and No are displayed

- Select ‘Yes’
 - The system will delete the selected appointment and allow the time to be reused.
 - The contents of the Scheduled Appointments display grid will be refreshed.
- Select ‘No’
 - The system will return to the View Appointments for Date dialog without deleting the appointment.

If the selected appointment is a group education class, the system will invoke a standard warning message with the text “Do you want to cancel the enrollment in the group education class scheduled on {class date} at {class time}?” The options of Yes and No will be available.

- Select ‘Yes’
 - The system will delete the appointment from the `APPOINTMENT` and `CLASS-ENROLLMENT` entities.
 - The system will decrease the enrolled seats for the group education class to allow those seats to be reused.
 - The contents of the Scheduled Appointments display grid will be refreshed.
- Select ‘No’

- The system will return to the View Appointments for Date dialog without canceling the class enrollment.

8.6.5.8 Close

Upon selection of the Close button, the system will dismiss the View Appointments for Date dialog and return to the Participant List window.

8.7 Appointments Tab

The Appointments tab of the Participant Folder allows the user to view the future appointments scheduled for all members of a household. The Participant Folder is described in *Clinic Chapter 09 - Participant Folder*. The Appointments tab is invoked when the user selects the Appointments tab in the Participant Folder.

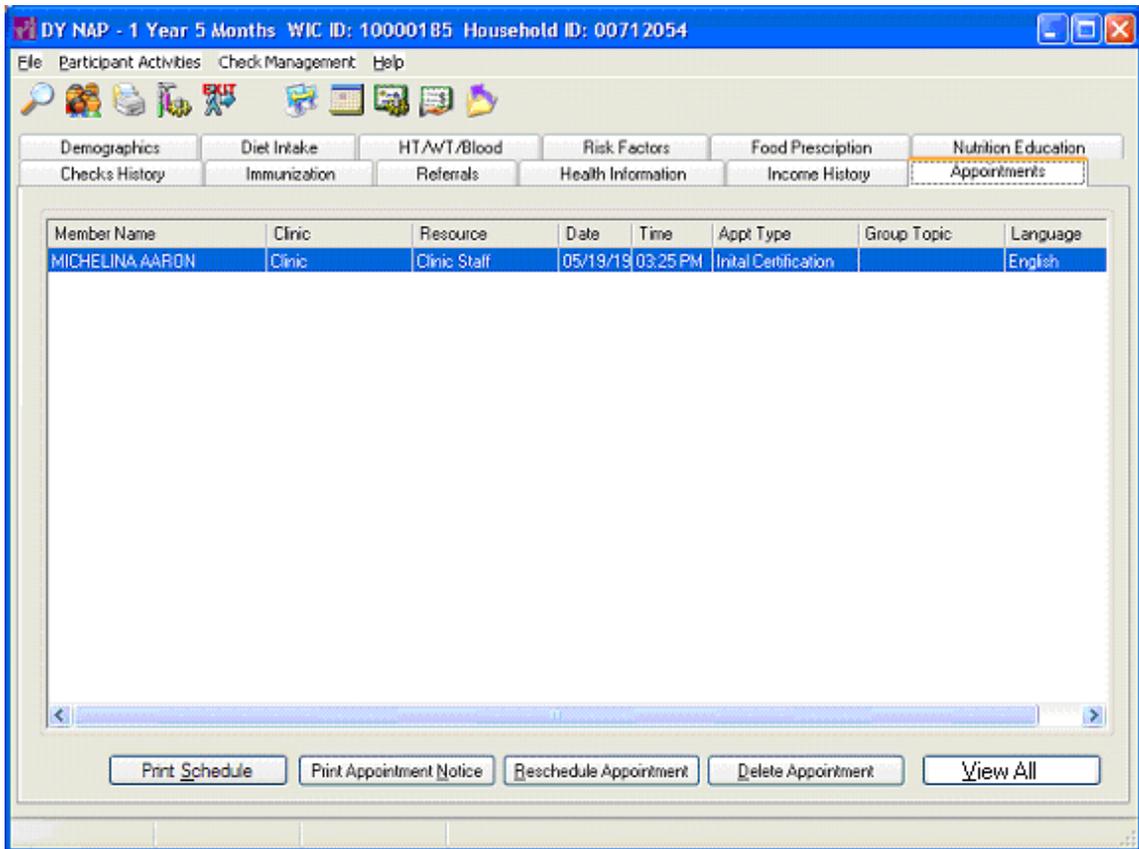


Figure 7 - Appointments Tab

8.7.1 Controls

This section describes the behavior of the controls on the Appointments tab of the Participant Folder.

8.7.1.1 Scheduled Appointments Display Grid

The display grid will be enabled when the Appointments tab is active. It consists of the following columns:

- Member Name
- Clinic

- Resource
- Date
- Time
- Appt Type
- Group Topic
- Language
- Requested Date
- Kept
- Appointment Comments
- Follow-up Date
- Follow-up Comments
- Missed Appt. Notice

An entry will be added to the grid for each individual appointment and group education class, scheduled for any member of the household, with a date that is equal to or greater than the current system date. The entries in the display grid will be sorted in ascending chronological order according to the Appointment Date and Appointment Time columns. The values on the grid are read-only.

8.7.1.2 Print Schedule Button

The Print Schedule button will be enabled when at least one appointment is listed in the Scheduled Appointments display grid and if the other output printer is selected (refer to *System Tools*). It has a mnemonic of “S”.

8.7.1.3 Print Appointment Notice Button

The Print Appointment Notice button will be enabled when an appointment is selected in the Scheduled Appointments display grid and if the other output printer is selected (refer to *System Tools*). It has a mnemonic of “N”.

8.7.1.4 Reschedule Appointment Button

The Reschedule Appointment button will be enabled when an appointment is selected in the Scheduled Appointments display grid. It has a mnemonic of “R” and is the default button for the tab.

8.7.1.5 Delete Appointment Button

The Delete Appointment button will be enabled when an appointment is selected in the Scheduled Appointments display grid. It has a mnemonic of “D”.

8.7.1.6 View All Button

The View All button will be enabled when the Appointments tab is active. It has a mnemonic of “V”.

8.7.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Appointments tab.

8.7.2.1 Initializing the Interface

Upon initial presentation of the Appointments tab the following values are displayed:

- The Scheduled Appointments display grid initially displays up to 1 year of previous appointment history as well as the currently scheduled appointments or group classes for all members with the same Member.HouseholdID as the open folder of the Member.StateWICID where the Appointment.AppointmentTime or ClassSchedule.ClassTime is equal to or greater than the current system date. The following values are displayed for each column:
- Member Name displays the Member.FirstName Member.LastName where the Member.StateWICID equals the Appointment.StateWICID or the ClassEnrollment.StateWICID
- Clinic displays the ServiceSite.Name where the ServiceSiteID equals either the Appointment.ServiceSiteID or the ClassEnrollment.ServiceSiteID
- Resource displays the AppointmentResource.Name
- Date displays the Appointment.AppointmentDate or the ClassSchedule.ClassDate.
- Time displays the Appointment.AppointmentTime or the ClassSchedule.ClassTime
- Appt Type: If the entry is of type individual appointment, the Appt Type displays the AppointmentType.Description. If the entry is of type group class, the Appt Type displays the text “Group Nutrition Education/Check Pickup”.
- Group Topic displays ClassType.Topic
- Language displays ReferenceDictionary.Description where the ReferenceDictionary.Category is ‘Language’ and the ReferenceDictionary.ExternalID equals ClassSchedule.Language
- Requested Date displays Appointment.CreateDate for appointments and ClassSchedule.CreateDate for a group class.
- Kept displays a ‘Yes’ or ‘No’ value. For an appointment the value is taken from the Appointment.AppointmentKept. For a group class the value is taken from the ClassEnrollment.EnrollmentKept.
- Appointment Comments will display the Appointment.Comments if entered. Otherwise, it will be blank.

- Follow-up Date displays the Appointment.FollowupDate in MM/DD/CCYY format.
- Follow-up Comments displays the Appointment.FollowupComment
- Missed Appt. Notice displays a 'Yes' or 'No' value. This value is taken from Appointment.MissedNoticeProduced.

8.7.2.2 Print Schedule

Upon selection of the Print Schedule button, the system will invoke the Generate Participant Appointment Schedule dialog (see *Generate Participant Appointment Schedule* section of this document).

8.7.2.3 Print Appointment Notice

Upon selection of the Print Appointment Notice button, the system will invoke the Generate Appointment Notice dialog (see *Generate Appointments Notice* section of this document).

8.7.2.4 Reschedule Appointment

If the user does not have the appropriate permissions (Appointments.Full Control) to reschedule an appointment, the system will invoke a standard error message with the text "You do not have the necessary permissions to reschedule an appointment. Please see the system administrator."

If the selected appointment is not a group education class, upon selection of the Reschedule button, the system will invoke the Reschedule Appointment dialog (see Reschedule Appointment for Household as described later in this document)

If the selected appointment is a group education class, upon selection of the Reschedule button, the system will invoke the Reschedule Group Class for Household dialog (see Reschedule Group Education Class for Household as described later in this document).

8.7.2.5 Delete Appointment

Upon selection of the Delete button, the system will verify permissions for the currently logged-on user. If the user does not have the appropriate permissions (Appointments.Full Control) to delete an appointment, the system will invoke a standard error message with the text "You do not have the necessary permissions to delete an appointment. Please see the system administrator."

Upon selection of the Delete button, the system will proceed as follows depending on the type of appointment selected in the Scheduled Appointments display grid:

If the selected appointment is not a group education class, the system will invoke a standard warning message with the text “Do you want to delete the appointment scheduled on {appointment date} at {appointment time}?” The options of Yes and No are displayed

- Select ‘Yes’
 - The system will delete the selected appointment and allow the time to be reused.
 - The contents of the Scheduled Appointments display grid will be refreshed.
- Select ‘No’
 - The system will return to the Appointments tab without deleting the appointment.

If the selected appointment is a group education class, the system will invoke a standard warning message with the text “Do you want to cancel the enrollment in the group education class scheduled on {class date} at {class time}?” The options of Yes and No will be available.

- Select ‘Yes’
 - The system will delete the appointment from the APPOINTMENT and CLASS-ENROLLMENT entities.
 - The system will decrease the enrolled seats for the group education class to allow those seats to be reused.
 - The contents of the Scheduled Appointments display grid will be refreshed.
- Select ‘No’
 - The system will return to the Appointments tab without canceling the class enrollment.

8.7.2.6 View All

Upon selection of the View All button, the system will refresh the Appointments grid to display all historical appointments as well as scheduled appointments for all household members associated with the selected participant.

8.8 Generate Participant Appointment Schedule

The Generate Participant Appointment Schedule dialog allows the user to generate a report that lists the upcoming appointments and group education classes for the participant or all members of their household. This dialog is invoked when the user selects the Print Schedule button on the Appointments tab of the Participant Folder.



Figure 8 - Generate Participant Appointment Schedule Dialog

8.8.1 Controls

This section describes the behavior of the controls on the Generate Participant Appointment Schedule dialog.

8.8.1.1 Household Members Radio Button Group

This control allows the user to indicate which participants to include on the appointment schedule. The radio button group consists of the following buttons:

- Current Participant
- All Members of Current Household

The radio button group will be enabled when the Generate Participant Appointment Schedule dialog is active. One radio button in the group must be selected.

8.8.1.2 Date Range From Masked Edit Box (From)

The masked edit box will be enabled when the Generate Participant Appointment Schedule 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.

8.8.1.3 Date Range To Masked Edit Box (To)

The masked edit box will be enabled when the Generate Participant Appointment Schedule 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.

8.8.1.4 OK Button

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

8.8.1.5 Cancel Button

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

8.8.2 Processes

8.8.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Generate Participant Appointment Schedule”.

The Current Participant radio button will initially be selected.

The Date Range From masked edit box will initially be blank

The Date Range To masked edit box will initially be blank

8.8.2.2 Edits

Upon selection of the OK button, if an entry is not made in the following:

- Date Range From masked edit box
- Date Range To masked edit box

The system will invoke a standard error message with the text “An entry is required for the {control label}”.

If an invalid date is entered in a date control, the system will invoke a standard error message with the text “Invalid date entered.”

If the value of the Date Range From masked edit box is less than the current system date the system will invoke a standard error message with the text, “Date entered must be equal to or greater than today’s date.”

If the value of the Date Range To masked edit box is less than the current system date the system will invoke a standard error message with the text, "Date entered must be equal to or greater than today's date."

If the Date Range From masked edit box is greater than the Date Range To masked edit box 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."

8.8.2.3 Generate Participant Appointment Schedule Report

Upon successful completion of data validation, the system will generate the Participant Appointment Schedule report described in the next section of this document.

8.9 Participant Appointment Schedule Report (Output) CLN016

This report allows the user to print a report that lists the upcoming appointments and group education classes for the participant or all members of their household. The report is generated from the Generate Participant Appointment Schedule dialog.

CLN016

<STATE NAME DEPARTMENT OF HEALTH>
 PARTICIPANT APPOINTMENT SCHEDULE REPORT
 xx/xx/xxxx - xx/xx/xxxx

RUN DATE: XX/XX/XXXX
 RUN TIME: XX:XX:XX
 PAGE: XXX

Karen M. Participant
 451 Main Street
 Anytown, KS 66062-1347
 913-555-3243

Household ID: 23954002

DATE	TIME	State WIC ID	CLIENT NAME/COMMENTS	WIC CATEGORY	TYPE/TOPIC	RESOURCE	Requested DATE	KEPT	Follow-up DATE
11/29/2005	09:00 AM	88766252	Karen M. Participant	B	Check Pick-up	Clinic Staff	11/20/2005	N	12/05/2005
<p>Appointment Comments: Applicant will be out of town for Thanksgiving. Appointment scheduled as early as possible when she gets back into town.</p> <p>Follow-up Comments: Contacted participant about missing the appointment. She has changed her mind and does not want to apply for WIC.</p>									
03/01/2005	08:00 AM	88766252	Karen M. Participant	B	Child Nutrition	Jan Brown	02/15/2005		
	08:20 AM	00976656	Quinton Z. Participant	C	Child Nutrition	Jan Brown	02/15/2005		

*** END OF LISTING ***

8.9.1 Data Elements

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

8.9.1.1 Report Title

8.9.1.1.1 Origin of Data Element

The title of the report will be the text “Participant Appointment Schedule” and the starting and ending date of the report. The starting and ending dates of the report will be entered on the Generate Participant Appointment Schedule dialog by the user.

8.9.1.1.2 Format

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

8.9.1.2 Client Name

8.9.1.2.1 Origin of Data Element

The value will be taken from the Member.FirstName Member.MiddleInitial and Member.LastName.

8.9.1.2.2 Format

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

8.9.1.3 Client Mailing Address

8.9.1.3.1 Origin of Data Element

The value will be taken from the Household.MailAddress.

8.9.1.3.2 Format

The value will print as its literal value.

8.9.1.4 Client Mailing City

8.9.1.4.1 Origin of Data Element

The value will be taken from the Household.MailCity.

8.9.1.4.2 Format

The value will print as its literal value.

8.9.1.5 Client Mailing State

8.9.1.5.1 Origin of Data Element

The value will be taken from the Household.MailState.

8.9.1.5.2 Format

The value will print as its literal value.

8.9.1.6 Client Mailing ZIP Code

8.9.1.6.1 Origin of Data Element

The value will be taken from the Household.MailZIP.

8.9.1.6.2 Format

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

8.9.1.7 Client Telephone Number

8.9.1.7.1 Origin of Data Element

The value will be taken from the Household.Telephone1.

8.9.1.7.2 Format

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

8.9.1.8 Household ID

8.9.1.8.1 Origin of Data Element

The value will be taken from the Household.HouseholdID.

8.9.1.8.2 Format

The value will print as its literal value.

8.9.1.9 Appointment Date/Class Date (Date)

8.9.1.9.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentDate for an appointment and the ClassSchedule.ClassDate for a group education class.

8.9.1.9.2 Format

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

8.9.1.10 Appointment Time/Class Time (Time)

8.9.1.10.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentTime for an appointment and the ClassSchedule.ClassTime for a group education class.

8.9.1.10.2 Format

The value will print in HH:MM {AM/PM} format.

8.9.1.11 State WIC ID

8.9.1.11.1 Origin of Data Element

The value will be taken from the Member.StateWICID.

8.9.1.11.2 Format

The value will print as its literal value.

8.9.1.12 Client Name

8.9.1.12.1 Origin of Data Element

The value will be taken from the Member.FirstName Member.MiddleInitial and Member.LastName for the associated State WICID printed on the report detail line.

8.9.1.12.2 Format

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

8.9.1.13 WIC Category

8.9.1.13.1 Origin of Data Element

The value will be taken from Member.WICStatus for the associated State WICID printed on the report detail line.

8.9.1.13.2 Format

The value will print in its literal value.

8.9.1.14 Appointment Type/Class Topic (Type/Topic)

8.9.1.14.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentType for an appointment and the ClassType.Topic for a group education class.

8.9.1.14.2 Format

The value will print as its literal value.

8.9.1.15 Resource Name (Resource)

8.9.1.15.1 Origin of Data Element

The value will be taken from the AppointmentResource.Name.

8.9.1.15.2 Format

The value will print as its literal value.

8.9.1.16 Requested Date

8.9.1.16.1 Origin of Data Element

The value will be taken from the Appointment.CreateDate for an appointment and the ClassSchedule.CreateDate for a group education class.

8.9.1.16.2 Format

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

8.9.1.17 Appointment Kept (Kept)

8.9.1.17.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentKept for an appointment and the ClassEnrollment.EnrollmentKept for a group education class.

8.9.1.17.2 Format

The value will print as its literal value.

8.9.1.18 Follow-up Date

8.9.1.18.1 Origin of Data Element

The value will be taken from the Appointment.FollowupDate for an appointment and will be blank for a group education class.

8.9.1.18.2 Format

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

8.9.1.19 Prescreening Comments (Comments)

8.9.1.19.1 Origin of Data Element

The value will be taken from the Member.PrescreeningComments.

8.9.1.19.2 Format

The value will print as its literal value.

8.9.1.20 Appointment Comments (Comments)

8.9.1.20.1 Origin of Data Element

The value will be taken from the Appointment.Comments for an appointment if comments were recorded. It will not be printed when comments were not recorded for an appointment, it and will not be printed for a group education class.

8.9.1.20.2 Format

The value will print as its literal value.

8.9.1.21 Follow-up Comments (Comments)

8.9.1.21.1 Origin of Data Element

The value will be taken from the Appointment.Comments for an appointment if comments were recorded. It will not be printed when comments were not recorded for an appointment, it and will not be printed for a group education class.

8.9.1.21.2 Format

The value will print as its literal value.

8.9.2 Filter Criteria

8.9.2.1 Appointments for Participant

When the Current Participant radio button is selected on the Generate Participant Appointment Schedule dialog, only appointments and group education classes for the current participant will be included in the report.

8.9.2.2 Appointments for All Members of Current Household

When the All Members of Current Household radio button is selected on the Generate Participant Appointment Schedule dialog, all appointments and group education classes for all members of the current participant's household will be included in the report.

8.9.3 Sort Order

8.9.3.1 Appointment/Class Date

The report will be sorted first by appointment/class date.

8.9.3.2 Appointment/Class Time

The report will be sorted by appointment/class time within appointment/class date.

8.9.3.3 State WICID

The report will be sorted by state WICID within appointment/class time.

8.9.4 Control Breaks

No control breaks are defined for this report.

8.9.5 Grand Total

A grand total has not been defined for this report.

8.10 Reschedule Appointment for Household

The Reschedule Appointment for Household dialog allows the user to reschedule an existing appointment to another date, time, or resource. This dialog is invoked in response to the following user actions:

- Selection of the Reschedule Appointment menu item on the Appointments menu of the View Appointments for Date dialog (described earlier in this document) when the selected appointment is not a group education class
- Selection of the Reschedule button on View Appointments for Date dialog (described earlier in this document) when the selected appointment is not a group education class
- Selection of the Reschedule Appointment button on Appointments tab of the Participant Folder (described earlier in this document) when the selected appointment is not a group education class

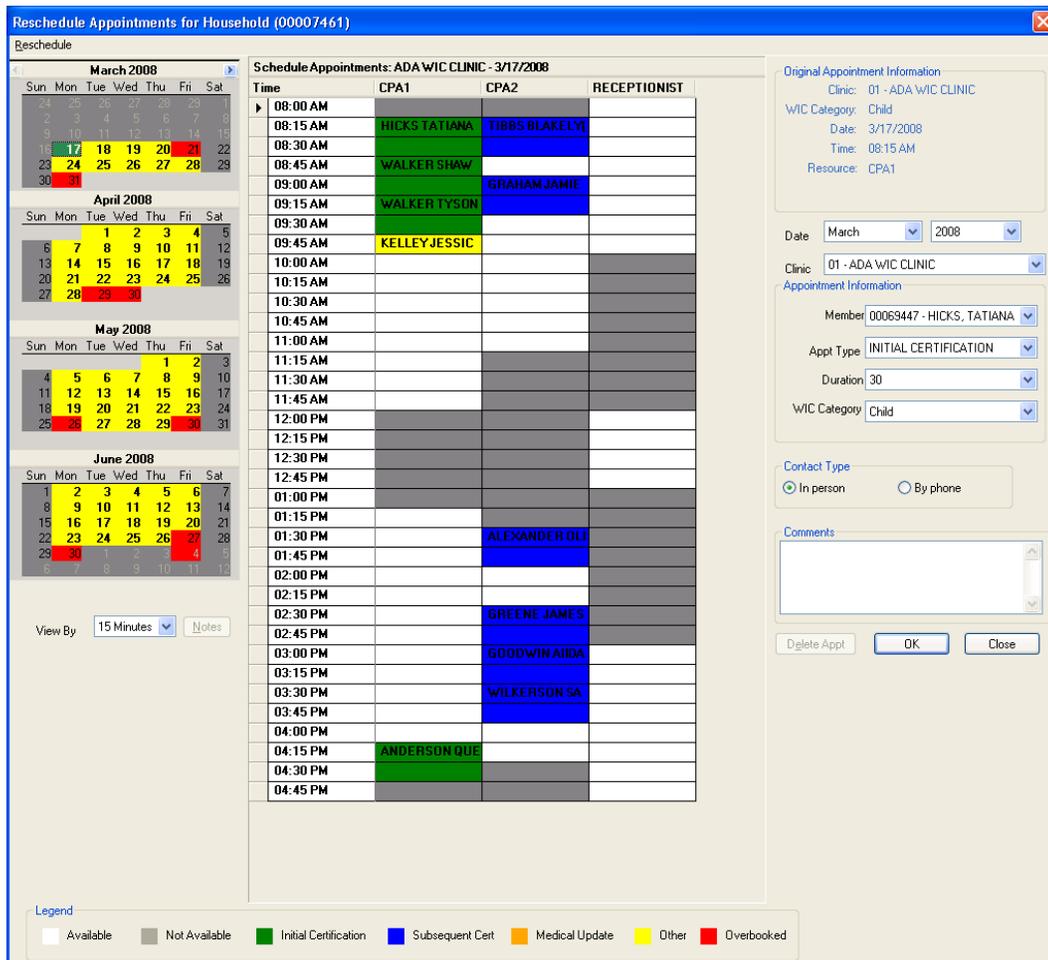


Figure 9 - Reschedule Appointment for Household Dialog

8.10.1 Reschedule Menu

The menu will be enabled when the Reschedule Appointment for Household dialog is active. It will have a mnemonic of "R". It will display the following Menu Items:

- Change Appt Type
- Change Clinic
- Change Date
- Change Duration
- Change Member
- Refresh Appointment Grid
- Reschedule Appointment
- Delete Appointment
- Exit

8.10.2 Menu Items

8.10.2.1 Change Appointment Type Menu Item

The menu item will be disabled when the Reschedule Appointment for Household dialog is active. It will have a mnemonic of "A".

8.10.2.2 Change Clinic Menu Item

The menu item will be available when the Reschedule Appointment for Household dialog is active. It will have a mnemonic of "L".

8.10.2.3 Change Date Menu Item

The menu item will be available when the Reschedule Appointment for Household dialog is active. It will have a mnemonic of "D".

8.10.2.4 Change Duration Menu Item

The menu item will be available when the Reschedule Appointment for Household dialog is active. It will have a mnemonic of "U".

8.10.2.5 Change Member Menu Item

The menu item will be disabled when the Reschedule Appointment for Household dialog is active. It will have a mnemonic of "M".

8.10.2.6 Refresh Appointment Grid Menu Item

The menu item will be available when the Reschedule Appointment for Household dialog is active. It will have a mnemonic of "R".

8.10.2.7 Reschedule Appointment Menu Item

The menu item will be available when the Reschedule Appointment for Household dialog is active. It will have a mnemonic of "S".

8.10.2.8 Delete Appointment Menu Item

The menu item will be available when the Reschedule Appointment for Household dialog is active and an appointment has been selected. It will have a mnemonic of "E".

8.10.2.9 Exit Menu Item

The menu item will be available when the Reschedule Appointment for Household dialog is active. It will have a mnemonic of "X".

8.10.3 Menu Item Processes

8.10.3.1 Change Clinic

Upon selection of the Change Clinic menu item, the system will set focus to the Clinic dropdown on the Reschedule Appointments for Household dialog.

8.10.3.2 Change Date

Upon selection of the Change Date menu item, the system will set focus to the Month dropdown on the Reschedule Appointments for Household dialog.

8.10.3.3 Change Duration

Upon selection of the Change Duration menu item, the system will set focus to the Duration dropdown on the Reschedule Appointments for Household dialog.

8.10.3.4 Refresh Appointment Grid

Upon selection of the Refresh Appointment Grid menu item, the system will refresh the Schedule Appointments display grid on the Reschedule Appointments for Household dialog.

8.10.3.5 Reschedule Appointment

Upon selection of the Reschedule Appointment menu item, the system will proceed as described in the processing section for Reschedule Appointment (see *Reschedule Appointments* in the Processing section for this dialog).

8.10.3.6 Delete

Upon selection of the Delete Appointment menu item, the system will proceed as described for processing of the Delete button (see *Delete Appointment* in the Processing section below).

8.10.3.7 Exit

Upon selection of the Exit menu item, the system will exit the dialog and return control to the calling window.

8.10.4 Controls

This section describes the behavior of the controls on the Reschedule Appointment for Household dialog.

8.10.4.1 Monthly Calendar

The Monthly Calendar will be enabled when the Schedule Appointments for Household dialog is active. It will display the month that matches the Month and Year dropdowns plus the following three months. The caption will display the Month and Year for the currently selected schedule.

The minimum date that can be displayed is the current system date and the maximum date that can be displayed is the last day of the current month plus one year. The calendar is color-coded to indicate the schedule availability as follows:

- Holidays: Red
- Business days: Yellow
- Currently selected date: Blue
- Non-business days or days not defined: Gray
- Current system date: Green

Upon a change in the date selected on the calendar, the values in the Schedule Appointment display grid will be refreshed.

8.10.4.2 Month Dropdown

The dropdown will be enabled when the Reschedule Appointment for Household dialog is active. It will contain an entry for each month of the year in month order. Upon a change in the month selected, the values in the Monthly Calendar and Schedule Appointments display grid will be refreshed.

8.10.4.3 Year Dropdown

The dropdown will be enabled when the Reschedule Appointment for Household dialog is active. It will contain an entry for the current year and the next year. Upon a change in the year selected, the values in the Monthly Calendar and Schedule Appointments display grid will be refreshed.

8.10.4.4 Clinic Dropdown

The dropdown will be enabled when the Reschedule Appointment for Household dialog is active. It will contain an entry for each Clinic in the ServiceSite entity associated with the selected Agency. It will display as 'ServiceSiteID-ServiceSiteName'. Upon a change in the Clinic selected, the values in the Monthly Calendar and Schedule Appointments display grid will be refreshed.

8.10.4.5 Household Member Dropdown (Member)

The dropdown will be disabled when the Reschedule Appointment for Household dialog is active. Note that this control does not receive focus and is not included in the tab order of this dialog.

8.10.4.6 Appointment Type Dropdown (Type)

The dropdown will be disabled when the Reschedule Appointment for Household dialog is active. Note that this control does not receive focus and is not included in the tab order of this dialog.

8.10.4.7 Duration Dropdown

The dropdown will be enabled when the Reschedule Appointment for Household dialog is active. It will contain a list of duration times from 5 minutes to 120 minutes in 5-minute increments.

8.10.4.8 WIC Category Dropdown

The WIC Category dropdown will be enabled when the Reschedule Appointments for Household dialog is active. It will contain a list of WIC Categories from the WICStatus entity.

8.10.4.9 Contact Type Radio Button Group

The radio button group will be enabled when the Reschedule Appointment for Household dialog is active. The radio button group consists of the following radio buttons:

- In person
- By phone

8.10.4.10 Original Appointment Clinic Text and Value Label

The value label will display the Clinic of the original appointment. It will display in the inverse color of the form.

8.10.4.11 Original Appointment WIC Category Text and Value Label

The value label will display the WIC Category of the original appointment. It will display in the inverse color of the form.

8.10.4.12 Original Appointment Date Text and Value Label (Date)

The value label will display the date of the original appointment. It will display in the inverse color of the form in MM/DD/CCYY format.

8.10.4.13 Original Appointment Time Text and Value Label (Time)

The value label will display the time of the original appointment. It will display in the inverse color of the form in HH:MM {AM/PM} format.

8.10.4.14 Original Appointment Resource Text and Value Label

The value label will display the resource of the original appointment. It will display in the inverse color of the form.

8.10.4.15 Comments Text Box

The text box will be enabled when the Reschedule Appointment for Household dialog is active. When the text exceeds the bounds of the text box a vertical scroll bar will display.

8.10.4.16 View By Dropdown

The dropdown will be enabled when the Reschedule Appointments for Household dialog is active. It will have increments of time, of "5 Minutes", "15 Minutes", "1/2 Hour", or "Hour". When the dropdown is changed the Schedule Appointments Display grid will change its view to show the appointments in increments of 5 minutes, 15 minutes, 1/2 hour, or hour.

8.10.4.17 Notes Button

The Notes button will be enabled whenever the day selected in the Monthly Calendar has an associated note. It has a mnemonic of "N".

8.10.4.18 Delete Appointment Button (Delete Appt)

The Delete Appointment button will be enabled when the Reschedule Appointment for Household dialog is active and an appointment has been selected from the Schedule Appointments display grid. It has a mnemonic of “E”.

8.10.4.19 OK Button

The OK button will be enabled when the Reschedule Appointment for Household dialog is active and the day is defined as a business day. Characteristics for the OK button are defined in *Consistencies*.

8.10.4.20 Close Button

The Close button will be enabled when the Reschedule Appointment for Household dialog is active. Characteristics for the Close button are defined in *Consistencies*.

8.10.4.21 Schedule Appointments Display Grid

The display grid will be enabled when the Reschedule Appointment for Household dialog is active. The grid header will display the read-only text “Scheduled Appointments:” plus ServiceSite.ServiceSiteName plus the date selected in the Monthly Calendar. The values on the grid are read-only. The grid will display the appropriate number of columns calculated from the resources scheduled for the selected Clinic and selected business day defined in the ResourceSchedule and AppointmentSource entities. (Refer to Central Administrative Site *Chapter 02 - Build Master Calendar*). The column headings will display the value entered into AppointmentResource.Name. The grid displays values using the color-coding described for the Legend. When the View By value is set to 15 Minutes, the entire business day will display in the Schedule Appointments display grid.

Each resource column will contain all appointments for the selected date for each Resource and all scheduled appointments for the selected date per resource in the defined color-coded fashion (see Legend). The information displayed for each appointment will contain Member.LastName, Member.FirstName, Member.MiddleInitial, (Appointment.WICStatus) (in parenthesis) plus [AppointmentType.Description] (in brackets) where the AppointmentType.AppointmentTypeID is associated with the Appointment.AppointmentTypeID.

If scheduled for the selected date, the appointment grid will also display the Group Education Class scheduled for the associated resource.

Selecting a cell in the Schedule Appointment display grid sets the Appointment Start Time for creating rescheduled appointments or selects an existing appointment for deletion.

Double-clicking a cell in the Schedule Appointment display grid sets the appointment time for the selected resource and invokes the [Confirm Rescheduling Appointment](#) dialog in the next section.

8.10.4.22 Legend

The Legend displays the color-coding and descriptions for the Schedule Appointments Display grid. The colors and descriptions are as follows:

- White: Available
- Grey: Not Available
- Green: Initial Certification
- Blue: Subsequent Cert
- Orange: Medical Update
- Yellow: Other
- Red: Overbook

Note that this control does not receive focus and is not included in the tab order of this dialog.

8.10.5 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Reschedule Appointment for Household dialog.

8.10.5.1 Initializing the Interface

Upon initial display, set the title bar text to “Reschedule Appointments for Household” plus the (Household.HouseholdID) (in parenthesis).

The Monthly Calendar will display the calendar for the current month and year plus the next three calendar months.

The Monthly Calendar will initially select the current system day.

The Monthly Calendar will color-code the calendar as defined in the Controls section of this dialog for Reschedule Group Education Class Monthly Calendar.

The Date Month dropdown will initially display the current month.

The Date Year dropdown will initially display the current year.

The Clinic dropdown will initially display Appointment.ServiceSiteID – ServiceSite.ServiceSiteName for the original appointment.

The Original Appointment Information will display the following:

- Clinic: Appointment.ServiceSiteID – ServiceSite.ServiceSiteName
- WIC Category: Member.WICStatus
- Date: Appointment.AppointmentDate
- Time: Appointment.AppointmentTime
- Resource: AppointmentResource.Name

The Member dropdown will be disabled.

The Member dropdown will display the selected Member information (Member.StateWICID – Member.LastName, Member.FirstName Member.MiddleInitial).

The Appointment Type will be disabled.

The Appointment Type will display the AppointmentType.Description.

The Duration dropdown will display the Appointment.Duration.

The WIC Category dropdown will display the selected Member.WICStatus.

The In person radio button in the Contact Type radio button group is initially selected.

The Comments text box will initially be blank.

The View By dropdown will initially display the value 15 Minutes.

The Schedule Appointments display grid generates and displays columns for all scheduled resources for the current system date.

The Schedule Appointments display grid will display all appointments and group classes scheduled in the appropriate columns for the current system date.

The Scheduled Appointments display grid will display the entire business day from start time to end time inclusively.

8.10.5.2 Edits

Upon selection of the OK button, if a selection is not made in the following:

- Monthly Calendar
- Clinic dropdown
- Duration dropdown
- WIC Category dropdown
- Contact Type radio button group

The system will invoke a standard error message with the text “A selection is required for the {control label}”.

If the date and time selected are the same as the current appointment, the system will invoke a standard error message with the text “The original appointment and the rescheduled appointment cannot be at the same date and time.”

If the day selected in the Monthly Calendar is not defined as a business day, an error message is displayed: “Invalid date entered.”

If the appointment time is before the current time, the system will invoke a standard error message with the text “The appointment time cannot be before the current time”.

If there is an appointment already scheduled for the selected time, the system will invoke a standard error message with the text “Participant <Last Name, First Name> has appointments scheduled during the time you have selected, <Starting time> - <Ending time> on <Date>.”

If there is a class already scheduled for the selected time the system will invoke a standard error message with the text, “Participant <Last Name, First Name> has been enrolled in a Group Education Class during the time you have selected, <Starting time> - <Ending time> on <Date>.” “Do you want to continue scheduling this appointment?” This message will have Yes/No buttons. If the Yes button is selected, then the appointment will be scheduled. If the No button is selected, then the appointment will not be scheduled.

If the selected appointment time is not available, the system will invoke a standard error message with the text “Resource <ResourceName> is not scheduled during the time you have selected, <Starting time> - <Ending time> on <Date>.”

If the selected resource is already scheduled for this time, the system will invoke a standard error message with the text “Resource <ResourceName> has other appointments scheduled during the time you have selected, <Starting time> - <Ending time> on <Date>. Continuing will cause the Resource to be overbooked.”

If the selected resource is already for a class for this time, the system will invoke a standard error message with the text “Resource <ResourceName> has a Group Education Class scheduled during the time you have selected, <Starting time> - <Ending time> on <Date>. Continuing will cause the Resource to be overbooked.”

8.10.5.3 Saving the Data

Upon successful completion of data validation, the system will display the Confirm Rescheduling Appointment message dialog as described in the next section of this document.

8.10.5.4 Delete Appointment

Upon selection of the Delete Appointment button, the system will verify permissions for the currently logged-on user. If the user does not have the appropriate permissions (Appointments.Full Control) to delete an appointment, the system will invoke a standard error message with the text “You do not have the necessary permissions to delete an appointment. Please see the system administrator.”

Upon selection of the Delete Appointment button, the system will proceed as follows depending on the type of appointment selected in the Scheduled Appointments display grid:

If the selected appointment is not a group education class, the system will invoke a standard warning message with the text “Do you want to delete the appointment scheduled on {appointment date} at {appointment time}?” The options of Yes and No are displayed

- Select ‘Yes’
 - The system will delete the selected appointment and allow the time to be reused.
 - The contents of the Scheduled Appointments display grid will be refreshed.
- Select ‘No’
 - The system will return to the Reschedule Appointments for Household dialog without deleting the appointment.

If the selected appointment is a group education class, the system will invoke a standard warning message with the text “Do you want to cancel the enrollment in the group education class scheduled on {class date} at {class time}?” The options of Yes and No will be available.

- Select ‘Yes’
 - The system will delete the appointment from the APPOINTMENT and CLASS-ENROLLMENT entities.
 - The system will decrease the enrolled seats for the group education class to allow those seats to be reused.
 - The contents of the Schedule Appointments display grid will be refreshed.
- Select ‘No’
 - The system will return to the Reschedule Appointments for Household dialog without canceling the class enrollment.

8.11 Confirm Rescheduled Appointment

When an appointment is rescheduled, a confirmation message appears to the user. This message allows the user to confirm the appointment or to reject it.

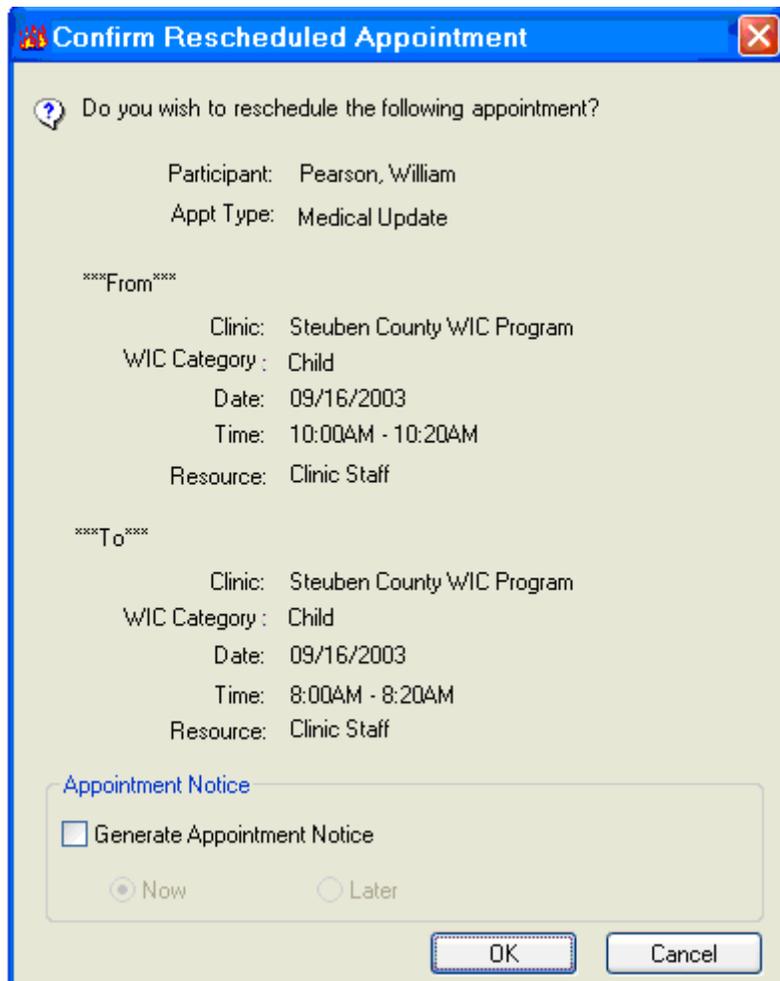


Figure 10 – Confirm Rescheduled Appointment Dialog

8.11.1 Controls

8.11.1.1 Confirmation Message label

The label control will be enabled when the Confirm Rescheduled Appointment message dialog is active. The message and value labels are defined in the processing section (see *Initializing the Interface* in the Processing section for this dialog). Note that this control does not receive focus and is not included in the tab order of this dialog.

8.11.1.2 *Generate Appointment Notice Check Box*

The check box will be enabled when the Confirm Rescheduled Appointment dialog is active. It will initially be blank.

8.11.1.3 *When to Generate Notice Radio Button Group*

The radio button group will be enabled when the Generate Appointment Notice check box is marked and the other output printer is selected (refer to System Tools). The radio button group consists of the following radio buttons:

- Now
- Later

The Now radio button will initially be marked. Upon selection of the Generate Appointment Notice check box, if there is no printer defined for the Other Output Printer (refer to *System Tools*) the system will disable the When to Generate Notice Radio Button Group and automatically select the Later radio button..

8.11.1.4 *OK button*

The button will be enabled when the Confirm Rescheduled Appointment dialog is active (see *Saving the Data* in the Processing section for this section). . Characteristics for the OK button are defined in *Consistencies*.

8.11.1.5 *Cancel button*

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

8.11.2 **Processes**

8.11.2.1 *Initializing the Interface*

Upon initial display, set the title bar text to “Confirm Rescheduled Appointment”

The confirmation message text, “Do you wish to reschedule the following appointment?” is displayed.

Participant label and value displays “Participant:” + Member.LastName, Member.FirstName Member.MiddleInitial

Appointment Type label and value displays “Appt Type:” + AppointmentType.Description

The values displayed in the 'From' are values from the Appointment entity for the selected StateWICID. The following read only information will be displayed:

- Informative Label "***From**"
- Clinic Label and value displays "Clinic:" + ServiceSite.Name
- WIC Category and value displays "WIC Category:" + <Appointment.WICStatus>
- Date Label and value displays "Date:" + Appointment.AppointmentDate
- Time Label and value displays "Time:" + Appointment.AppointmentTime
- Resource Label and value displays "Resource:" + AppointmentResource.Name (where the Appointment.ResourceID equals the AppointmentResource.AppointmentResourceID)

The values displayed in the 'To' information are the values selected on the Reschedule Appointment for Household dialog for the selected StateWICID. The following read only information will be displayed:

- Label control displayed "***To**"
- Clinic Label and value displays "Clinic:" + ServiceSite.Name
- WIC Category and value displays "WIC Category:" + <Appointment.WICStatus>
- Date Label and value displays "Date:" + Appointment.AppointmentDate
- Time Label and value displays "Time:" + Appointment.AppointmentTime
- Resource Label and value displays "Resource:" + AppointmentResource.Name (where the Appointment.ResourceID equals the AppointmentResource.AppointmentResourceID)

The Generate Appointment Notice check box is initially blank.

The When to Generate Notice radio button group is initially disabled.

The Now radio button in the When to Generate Notice radio button group is initially selected.

8.11.2.2 Appointment Notice Processing

Upon selecting the OK button, if the Generate Appointment Notice checkbox is selected and the 'Now' radio button is selected, the system will display the Generate Appointment Notice dialog (see *Generate Appointment Notice* described later in this document). The system then saves the appointment. (see *Saving the Data* for this dialog)

If the Generate Appointment Notice checkbox is selected and the 'Later' radio button is selected, the system sets the Appointment.QueuedNotice value equal to 'Y' and the system saves the appointment. (see *Saving the Data* for this dialog)

If the check box for Generate Appointment Notice was not selected, the system saves the appointment. (see Saving the Data for this dialog)

8.11.2.3 Saving the Data

The system deletes the original appointment from the Appointment entity.

The system schedules the new appointment at the specified date and time for the specified household member, appointment type, duration, and resource in the APPOINTMENT entity.

If an appointment time and resource were not selected in the grid, the system will automatically select the next available appointment time and resource in the grid.

If the Generate Appointment Notice Now is selected, the Appointment Notice the system will display the Generate Appointment Notice dialog (see Generate Appointment Notice described later in this document).

If the Generate Appointment Notice checkbox and 'Later' radio button is selected, the Appointment.QueuedNotice value is set to 'Y'.

The system will dismiss the Confirm Rescheduling Appointment and the Reschedule Appointment for Household dialogs and return to the process that called the Reschedule Appointment for Household dialog.

8.11.2.4 Cancel

Upon selection of the Cancel button, the appointment is not rescheduled and control is returned to the Reschedule Appointment for Household dialog.

8.11.2.5 Data Map

Control Label	Entity	Attribute	Business Rule
Participant	APPOINTMENT	STATEWICID	
Appt Type	APPOINTMENT	APPOINTMENTTYPEID	
Clinic	APPOINTMENT	SERVICESITEID	
WIC Category	APPOINTMENT	WICSTATUS	
Date	APPOINTMENT	APPOINTMENTDATE	
Time	APPOINTMENT	APPOINTMENTTIME	
Resource	APPOINTMENT	RESOURCEID	
Generate Appointment Notice (later)	APPOINTMENT	QUEUEDNOTICE	

8.12 Reschedule Group Education Class for Household

The Reschedule Group Education Class for Household dialog allows the user to reschedule the enrollment of a household member in a group education class. This dialog is invoked in response to the following user actions:

- Selection of the Reschedule Appointment menu item on the Appointments menu of the View Appointments for Date dialog (described earlier in this document) when the selected appointment is a group education class
- Selection of the Reschedule button on View Appointments for Date dialog (described earlier in this document) when the selected appointment is a group education class
- Selection of the Reschedule Appointment button on Appointments tab of the Participant Folder (described earlier in this document) when the selected appointment is a group education class

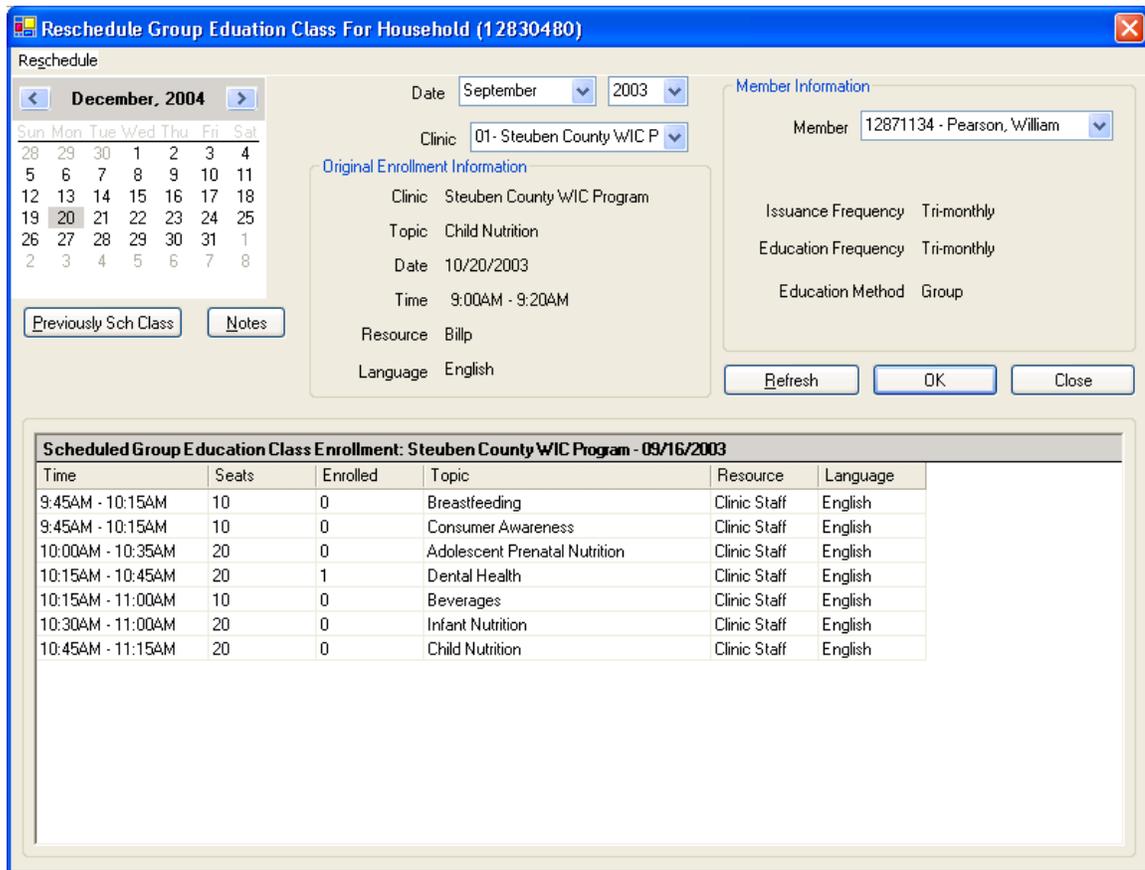


Figure 11 - Reschedule Group Education Class Dialog

8.12.1 Reschedule Menu

The menu will be enabled when the Reschedule Group Education Class for Household dialog is active. It will have a mnemonic of “S”. It will display the following Menu Items:

- Change Clinic
- Change Date
- Change Member
- Refresh Class Grid
- Reschedule Enrollment
- Exit

8.12.2 Menu Items

8.12.2.1 Change Clinic Menu Item

The menu item will be available when the Reschedule Group Education Class for Household dialog is active. It will have a mnemonic of “L”.

8.12.2.2 Change Date Menu Item

The menu item will be available when the Reschedule Group Education Class for Household dialog is active. It will have a mnemonic of “D”.

8.12.2.3 Change Member Menu Item

The menu item will be disabled when the Reschedule Group Education Class for Household dialog is active. It will have a mnemonic of “M”.

8.12.2.4 Refresh Class Grid Menu Item

The menu item will be available when the Reschedule Group Education Class for Household dialog is active. It will have a mnemonic of “R”.

8.12.2.5 Reschedule Enrollment Menu Item

The menu item will be available when the Reschedule Group Education Class for Household dialog is active. It will have a mnemonic of “S”.

8.12.2.6 Exit Menu Item

The menu item will be available when the Reschedule Group Education Class for Household dialog is active. It will have a mnemonic of “X”.

8.12.3 Menu Item Processes

8.12.3.1 Change Clinic

Upon selection of the Change Clinic menu item, the system will set focus to the Clinic dropdown on the Reschedule Group Class for Household dialog.

8.12.3.2 Change Date

Upon selection of the Change Date menu item, the system will set focus to the Month dropdown on the Reschedule Group Class for Household dialog.

8.12.3.3 Refresh Class Grid

Upon selection of the Refresh Class Grid menu item, the system will refresh the Scheduled Group Education Classes display grid on the Reschedule Group Class for Household dialog.

8.12.3.4 Reschedule Enrollment

Upon selection of the Reschedule Enrollment menu item, the system will proceed as described in the processing section for Reschedule Class Enrollment (see *Reschedule Class Enrollment* in the Processing section for this dialog).

8.12.3.5 Exit

Upon selection of the Exit menu item, the system will exit the dialog and return control to the calling window.

8.12.4 Controls

8.12.4.1 Monthly Calendar

The monthly calendar will be enabled when the Reschedule Group Education Class for Household dialog is active. It will display the month that matches the Month and Year dropdowns. The user can select a day with which to work in the monthly calendar. The caption will display the Month and Year for the currently selected schedule. The minimum date allowed is the current system date and the maximum date allowed is the last day of the month plus one year. The calendar is color-coded to indicate the schedule availability as follows:

- Holidays: Red
- Business days: Yellow
- Currently selected date: Blue

- Non-business days or days not defined: Gray
- Current system date: Green

Upon a change in the date selected on the monthly calendar, the values in the Scheduled Group Education Classes display grid will be refreshed.

8.12.4.2 Month Dropdown

The dropdown will be enabled when the Reschedule Group Education Class for Household dialog is active. It will display each month of the year in month order. It will be initially set to the current month. Upon a change in the month selected, the values in the Monthly Calendar and Schedule Group Education Class display grid will be refreshed.

8.12.4.3 Year Dropdown

The dropdown will be enabled when the Reschedule Group Education Class for Household dialog is active. It will contain an entry for the current year and the next year. It will be initially set to the current system year. Upon a change in the year selected, the values in the Monthly Calendar and Schedule Group Education Class display grid will be refreshed.

8.12.4.4 Clinic Dropdown

The dropdown will be enabled when the Reschedule Group Education Class for Household dialog is active. It will contain an entry for each Clinic in the ServiceSite entity associated with the selected Agency. It will display as 'ServiceSiteID-ServiceSiteName'. It will initially be populated with the Clinic defined for the group education class enrollment to be rescheduled. Upon a change in the Clinic selected, the values in the Monthly Calendar and Schedule Group Education Class display grid will be refreshed.

8.12.4.5 Household Member Dropdown (Member)

The dropdown will be disabled when the Reschedule Group Education Class for Household dialog is active. The dropdown will display the name of the household member whose appointment is being rescheduled.

8.12.4.6 Original Appointment Clinic Text and Value Label

The value label will display the Clinic of the group education class in which the household member is currently enrolled. It will display in the inverse color of the form.

8.12.4.7 Original Group Education Topic Text Label and Value Label (Group Topic)

The value label will display the textual lookup value of the group education topic of the group education class in which the household member is currently enrolled. It will display in the inverse color of the form.

8.12.4.8 Original Class Enrollment Date Text and Value Label (Date)

The value label will display the date of group education class in which the household member is currently enrolled. It will display in the inverse color of the form.

8.12.4.9 Original Class Enrollment Time Text Label and Value Label (Time)

The value label will display the time of the group education class in which the household member is currently enrolled. It will display in the inverse color of the form.

8.12.4.10 Original Resource Text Label and Value Label

The value label will display the textual lookup value of the resource of the group education class in which the household member is currently enrolled. It will display in the inverse color of the form.

8.12.4.11 Original Language Text Label and Value Label

The value label will display the textual lookup value of the language of the group education class in which the household member is currently enrolled. It will display in the inverse color of the form.

8.12.4.12 Scheduled Group Education Classes Display Grid

The display grid will be enabled when the Reschedule Group Education Class for Household dialog is active. The grid header will display the read-only text "Scheduled Group Education Class Enrollment:" plus ServiceSite.ServiceSiteName plus the date selected in the Monthly Calendar. It consists of the following columns:

- Time
- Seats (Maximum)
- Enrolled (Seats)
- Topic (Group Topic)
- Resource
- Language

The grid will display the values from the ClassSchedule and ClassType entities for the date selected in the Group Education Class monthly calendar. The entries in the grid will be sorted in chronological order by the Class-Time attribute. The values on the grid are read-only. A single selection may be made by the user. Double-clicking on an entry in the grid sets the time for the selected class.

8.12.4.13 Previously Scheduled Classes Button

The Previously Scheduled Classes button will be enabled whenever the day selected in the Monthly calendar has group education classes for the household scheduled. It has a mnemonic of “P”.

8.12.4.14 Notes Button

The Notes button will be enabled whenever the day selected in the Group Education Class Monthly calendar has a note associated to it. It has a mnemonic of “N”.

8.12.4.15 Refresh Button

The Refresh button will be enabled when the Reschedule Group Education Class for Household dialog is active. It has a mnemonic of “R”.

8.12.4.16 OK Button

The OK button will be enabled when the Reschedule Group Education Class for Household dialog is active. Characteristics for the OK button are defined in *Consistencies*.

8.12.4.17 Close Button

The Close button will be enabled when the Reschedule Group Education Class for Household dialog is active. Characteristics for the Close button are defined in *Consistencies*.

8.12.5 Processes

8.12.5.1 Initializing the Interface

Upon initial display, set the title bar text to “Reschedule Group Education Class for Household” plus the (Household.HouseholdID) (in parenthesis).

The Monthly Calendar will display the calendar for the current month and year.

The Monthly Calendar will initially select the current system day.

The Monthly Calendar will color-code the calendar as defined in the Controls section of this dialog for Reschedule Group Education Class Monthly Calendar.

The Date Month dropdown will initially display the current month.

The Date Year dropdown will initially display the current year.

The Clinic dropdown will initially display Class_Schedule.ServiceSiteID – ServiceSite.ServiceSiteName for the original group education class.

The Original Group Education Class Information will display the following:

- Clinic: Class_Schedule.ServiceSiteID – ServiceSite.ServiceSiteName
- Topic: ClassType.ShortDescription
- Date: ClassSchedule.ClassDate
- Time: ClassSchedule.ClassTime
- Resource: AppointmentResource.Name
- Language: ClassSchedule.Language

The Member dropdown will display the selected Member information (Member.StateWICID – Member.LastName, Member.FirstName Member.MiddleInitial). The Member dropdown will be disabled.

The Issuance Frequency text value will initially display the selected member's issuance frequency.

The Education Frequency text value will initially display the selected member's education frequency.

The Education Method text value will initially display the selected member's education method.

The Scheduled Group Education Classes display grid initially displays the scheduled group classes for the current system date.

8.12.5.2 Edits

Upon selection of the Reschedule menu item or the OK button, the system will verify a selection is made in the Scheduled Group Education Classes display grid. If a selection is not made, the system will invoke a standard error message with the text "Please select a class from the grid".

If the class to be rescheduled is selected in the grid, the system will invoke a standard error message with the text "Please select a class from the Scheduled Class grid that is different from the class you are rescheduling from."

If the class selected in the Scheduled Class grid is full, the system will invoke a standard error message with the text “The class you selected is already full”.

If the member has an appointment scheduled for this time, the system will invoke a standard error message with the text, “Participant <Last Name, First Name> has appointments scheduled during the time you have selected, <Starting time> - <Ending time> on <Date>. Do you want to continue scheduling this appointment?” with Yes and No buttons.

- Select ‘Yes’, the class is scheduled.
- Select ‘No’, the class is not scheduled.

If the member has a class scheduled for this time, the system will invoke a standard error message with the text “Participant <Last Name, First Name> has been enrolled in a Group Education Class during the time you have selected, <Starting time> - <Ending time> on <Date>.”

8.12.5.3 Saving the Data

Upon successful completion of data validation, the system will display the Confirm Reschedule Group Education Class message dialog as described in the next section of this document.

8.12.5.4 Previously Scheduled Classes

Upon selection of the Previously Scheduled Classes button, the system will display the Previously Scheduled Classes dialog (see *Previously Scheduled Classes* described later in this document). If a class is returned from the Previously Scheduled Classes dialog, the system will replace the original class, update the Original Enrollment Information section with the selected entry in the Previously Scheduled Classes for Household grid and refresh the panel.

8.12.5.5 Refresh

Upon selection of the Refresh button, the system will refresh the information in the Rescheduled Group Education Classes Display grid.

8.13 Confirm Rescheduled Class

When a group class is rescheduled, a confirmation message appears to the user. This message allows the user to confirm the group class or to reject it.

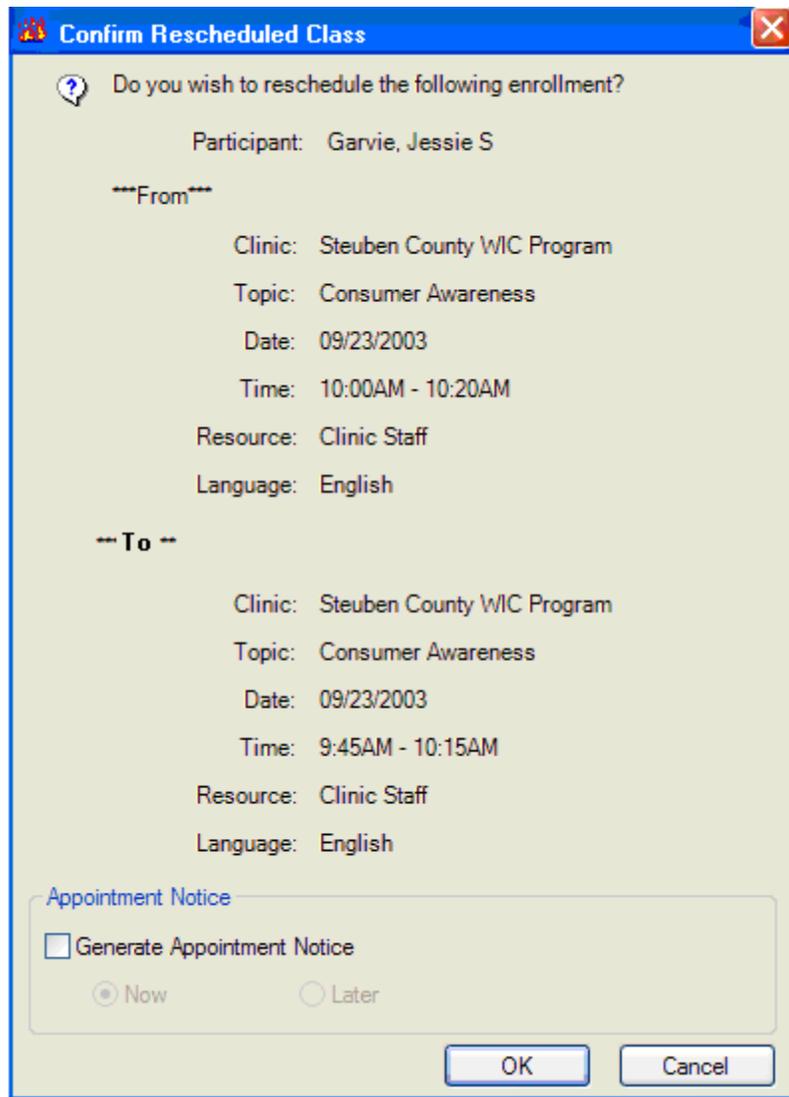


Figure 12 – Confirm Rescheduled Class Dialog

8.13.1 Controls

This section describes the behavior of the controls on the Confirm Rescheduled Class message dialog.

8.13.1.1 Confirmation Message label

The label control will be enabled when the Confirm Rescheduled Class message dialog is active. The message and value labels are defined in the processing section (see *Initializing the Interface* in the Processing section for this dialog). Note that this control does not receive focus and is not included in the tab order of this dialog.

8.13.1.2 Generate Appointment Notice Check Box

The check box will be enabled when the Confirm Rescheduled Class message dialog is active.

8.13.1.3 When to Generate Notice Radio Button Group

The radio button group consists of the following radio buttons:

- Now
- Later

The radio button group will be enabled when the Generate Appointment Notice check box is marked and the other output printer is selected (refer to *System Tools*).

8.13.1.4 OK button

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

8.13.1.5 Cancel button

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

8.13.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Confirm Rescheduled Class message dialog.

8.13.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Confirm Rescheduled Class”

Text message displays the message text, “Do you wish to reschedule the following enrollment?”

Participant label and value displays “Participant:” + Member.LastName, Member.FirstName Member.MiddleInitial

The values displayed in the 'From' are ClassEnrollment.ClassScheduleID values associated with the ClassSchedule and ClassType entities for the selected StateWICID. The following read only information will be displayed:

- Informative Label "***From**"
- From Clinic Label and value displays "Clinic:" + ServiceSite.Name
- Topic Label and value displays "Topic:" + ClassType.Topic
- Date Label and value displays "Date:" + ClassSchedule.ClassDate
- Time Label and value displays "Time:" + ClassSchedule.ClassTime
- Resource Label and value displays "Resource:" + AppointmentResource.Name (where the ClassSchedule.ResourceColumn equals the AppointmentResource.AppointmentResourceID)
- Language Label and value displays "Language:" + ReferenceDictionary.Description where the ReferenceDictionary.Category is 'Language' and the ReferenceDictionary.ExternalID equals ClassSchedule.Language

The values displayed in the 'To' information are taken from the ClassSchedule entity for the class selected to reschedule for the member. The following read only information will be displayed:

- Label control displayed "***To**"
- Clinic Label and value displays "Clinic:" + ServiceSite.Name
- Topic Label and value displays "Topic:" + ClassType.Topic
- Date Label and value displays "Date:" + ClassSchedule.ClassDate
- Time Label and value displays "Time:" + ClassSchedule.ClassTime
- Resource Label and value displays "Resource:" + AppointmentResource.Name (where the ClassSchedule.ResourceColumn equals the AppointmentResource.AppointmentResourceID)
- Language Label and value displays "Language:" + ReferenceDictionary.Description where the ReferenceDictionary.Category is 'Language' and the ReferenceDictionary.ExternalID equals ClassSchedule.Language

The Generate Appointment Notice check box is initially cleared

The Now radio button is initially selected and disabled

The Later radio button is initially cleared and disabled

8.13.2.2 Appointment Notice Processing

Upon selection of the OK button, if the Generate Appointment Notice check box is checked and the Now radio button of the When to Generate Notice radio button group is selected, before enrolling the household member in the class the system will invoke the Generate Appointment Notice dialog. (see Generate Appointment Notice described later in this document)

Upon selection of the OK button, if the Generate Appointment Notice check box is checked and the Later radio button of the When to Generate Notice radio button group is selected, the system will set the ClassEnrollment.QueuedNotice equal to 'Y' and proceed with saving the data. (see Saving the Data for this dialog below)

Upon selection of the OK button, if the Generate Appointment Notice check box is not checked the system will proceed with saving the data. (see Saving the Data for this dialog below)

8.13.2.3 Saving the Data

The system will enroll the household member in the selected group education class.

The system will increment the number of attendees in the CLASS-SCHEDULE entity for the newly selected class.

The system will reduce number of attendees in the CLASS-SCHEDULE entity for the original class being rescheduled.

The system will create a new record in the CLASS-ENROLLMENT entity and delete the original record.

The system will return to the Reschedule Group Education Class for Household dialog, repopulate the controls and refresh the Reschedule Group Education Class display grid.

8.13.2.4 Cancel

Upon selection of the Cancel button, the system returns to the Reschedule Group Education Class for Household dialog.

8.13.2.5 Data Map

Control Label	Entity	Attribute	Business Rule
Participant	CLASSENROLLMENT	STATEWICID	
Clinic	CLASSSCCHEDULE	SERVICESITEID	
Topic	CLASSSCCHEDULE	CLASSTYPEID	
Date	CLASSSCCHEDULE	CLASSDATE	
Time	CLASSSCCHEDULE	CLASSTIME	
Resource	CLASSSCCHEDULE	RESOURCECOLU MN	
Language	CLASSSCCHEDULE	LANGUAGE	
Generate Appointment Notice (later)	CLASSENROLLMENT	QUEUEDNOTICE	

8.14 Previously Scheduled Classes

The Previously Scheduled Classes dialog is invoked when Previously Scheduled Classes button is selected on the Reschedule Group Class for Household dialog, described earlier in this document.

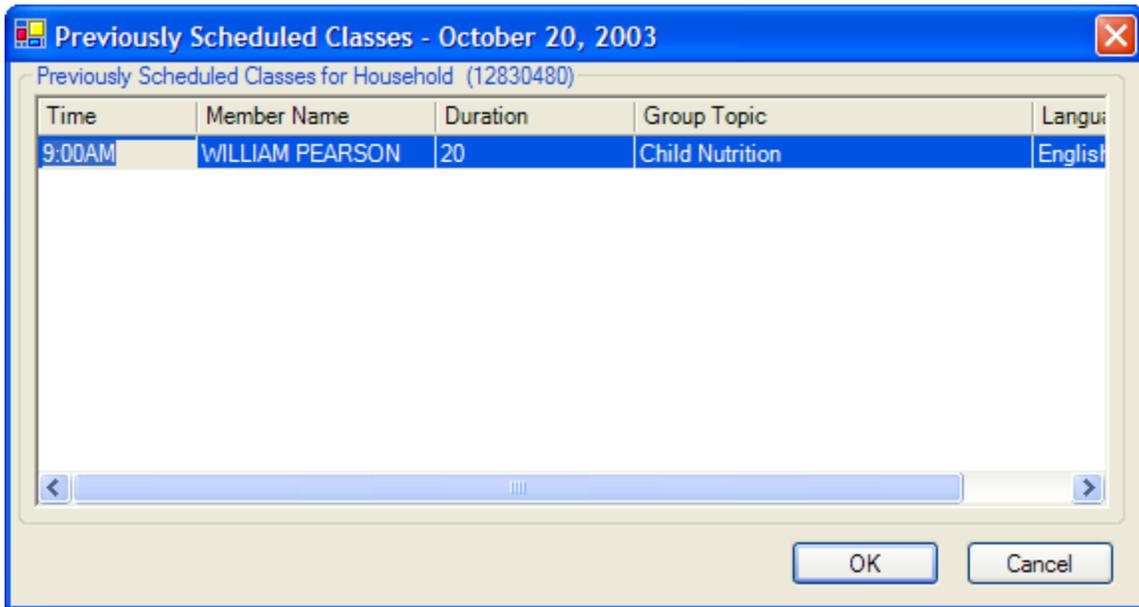


Figure 13– Previously Scheduled Classes Dialog

8.14.1 Controls

This section describes the behavior of the controls on the Previously Scheduled Classes dialog.

8.14.1.1 Previously Scheduled Classes Display Grid (Previously Scheduled Classes for Household)

This control allows the user to select the group education class in which to reschedule the household member. The display grid will be enabled when the Previously Scheduled Classes dialog is active. It consists of the following columns:

- Time
- Member Name
- Duration
- Topic (Group Topic)
- Language

The grid will display information on the group education classes scheduled for the date selected in the Group Education Class monthly calendar. The entries in the grid will be sorted in chronological order according to the values of the Time of Class column. The values on the grid are read-only. Single selection is allowed.

8.14.1.2 OK button

The OK button will be enabled when the Previously Scheduled Classes dialog is active and a selection has been made in the Previously Scheduled Classes grid. Characteristics for the OK button are defined in *Consistencies*.

8.14.1.3 Cancel button

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

8.14.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Previously Scheduled Classes dialog.

8.14.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Previously Scheduled Classes” and the date selected from the monthly calendar

The Previously Scheduled Classes for Household frame caption displays “Previously Scheduled Classes for Household” plus (HouseholdID) (in parenthesis)

All members with the HouseholdID scheduled for a group class on the selected date are displayed in the display grid

The first record in the grid is initially selected.

8.14.2.2 Saving the Data

When the OK button is selected the system will return to the Reschedule Group Education Class for Household dialog and replace the original class and the Original Enrollment Information section with the selected entry in the Previously Scheduled Classes for Household grid.

8.14.2.3 Cancel

If the Cancel button is selected, then a group class is not scheduled and control is returned to the Reschedule Group Education Class for Household dialog.

8.15 Reschedule Block of Appointments

The Reschedule Block of Appointments dialog allows the user to reschedule a block of appointments for a Clinic to another Clinic, date, and/or time. It also allows the user to generate appointment notices for the rescheduled appointments. The dialog is invoked when the user selects the Reschedule Block of Appointments menu item on the Activities menu described in *Clinic Chapter 06 - Search-Selection*.

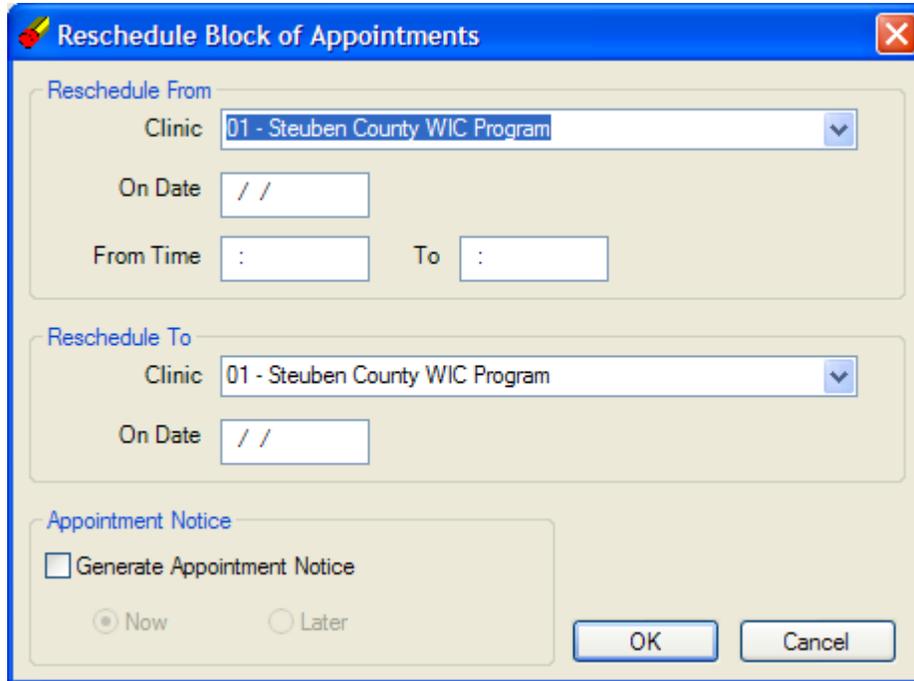


Figure 14 - Reschedule Block of Appointments Dialog

8.15.1 Controls

8.15.1.1 Reschedule from Clinic Dropdown (Clinic)

The dropdown will be enabled when the Reschedule Block of Appointments dialog is active. It will contain an entry for each Clinic belonging to the local agency. The initially selected entry will be the default Clinic of the logged-on user.

8.15.1.2 Reschedule from Date Masked Edit Box (On Date)

The masked edit box will be enabled when the Reschedule Block of Appointments 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.

8.15.1.3 From Start Time Masked Edit Box (From Time)

The masked edit box will be enabled when the Reschedule Block of Appointments dialog is active. The masked edit box will only accept entry of numeric characters and “AM” or “PM”. The mask on the box will be “##:## AA” to accept a four digit time and “AM” or “PM”. It will initially be blank.

8.15.1.4 From End Time Masked Edit Box (to)

The masked edit box will be enabled when a valid time is entered in the From Start Time masked edit box. The masked edit box will only accept entry of numeric characters and “AM” or “PM”. The mask on the box will be “##:## AA” to accept a four digit time and “AM” or “PM”. It will initially be blank.

8.15.1.5 Reschedule to Clinic Dropdown (Clinic)

The dropdown will be enabled when the Reschedule Block of Appointments dialog is active. It will contain an entry for each Clinic that belongs to the local agency. The initially selected entry will be the default Clinic of the logged-on user.

8.15.1.6 Reschedule to Date Masked Edit Box (On Date)

The masked edit box will be enabled when the Reschedule Block of Appointments 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. It will initially be blank.

8.15.1.7 Generate Appointment Notice Check Box

The check box will be enabled when the Reschedule Block of Appointments dialog is active. It will initially be blank.

8.15.1.8 When to Generate Notice Radio Button Group

The radio button group consists of the following radio buttons:

- Now
- Later

The radio button group will be enabled when the Generate Appointment Notice check box is marked and the other output printer is selected (refer to System Tools). If the other output printer is not selected, the system will automatically select the Later radio button and the radio button group will be disabled.

8.15.1.9 OK Button

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

8.15.1.10 Cancel Button

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

8.15.2 Processes

8.15.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Reschedule Block of Appointments”.

Reschedule from Values are displayed as follows:

- The Clinic dropdown is initially set to the first clinic in the list
- The On Date is initially blank
- The From Time is initially blank
- The to time is initially blank

Reschedule to Values are displayed as follows:

- The Clinic dropdown is initially set to the first clinic in the list
- The On Date is initially blank

Generate Appointment Notice is initially blank

The Now radio button is initially selected

The Now radio button is disabled

The Later radio button is disabled

8.15.2.2 Edits

Upon selection of the OK button, if an entry is not made in the following:

- Reschedule from Clinic dropdown
- Reschedule to Clinic dropdown

The system will invoke a standard error message with the text “A selection is required in the {control label}”.

If an entry is not made in the following:

- Reschedule from Date masked edit box

- From Start Time masked edit box
- From End Time masked edit box
- Reschedule to Date masked edit box

the system will invoke a standard error message with the text “An entry is required for the {control label}”.

If an invalid date is typed in the following:

- Reschedule from On Date masked edit box
- Reschedule to On Date masked edit box

The system will invoke a standard error message with the text “Invalid date entered”.

If an invalid time is typed in the following:

- From Start Time masked edit box
- From End Time masked edit box

the system will invoke a standard error message with the text “Invalid time entered”.

If the From Start Time is greater than the From End Time the system will invoke a standard error message with the text “The starting source time is greater than the ending source time”.

If the value of the Reschedule From Date masked edit box is less than the current system date, the system will invoke an error message with the text, “Date must be equal to or greater than today’s date.”

If the value of the Reschedule To Date is less than the current system date, the system will invoke an error message with the text, “Date must be equal to or greater than today’s date.”

If the value of the Reschedule From Date is greater than the date entered in the Reschedule To Date, the system will invoke an error message with the text, “Reschedule From Date must be equal to or less than Reschedule To Date.”

If the value of the From Start Time is greater than the time entered in the From End Time, the system will invoke an error message with the text, “The starting source time is greater than the ending source time.”

If the date specified in the Reschedule from Date is not a defined business day for the Clinic selected in the Reschedule From Clinic dropdown, the system will invoke a standard error message with the text “The date specified is not a defined business day for the From Clinic.”

If business hours are not defined for the Clinic selected in the Reschedule From Clinic dropdown, the system will invoke a standard error message with the text “The business hours are not defined for the From Clinic.”

If the value of the From Start Time is not a defined business hour for the Clinic selected in the Reschedule From Clinic, the system will invoke a standard error message with the text “The start time specified is not within the defined business hours for the From Clinic.”

If the value of the From End Time is not a defined business hour for the Clinic selected in the Reschedule From Clinic, the system will invoke a standard error message with the text “The end time specified is not within the defined business hours for the From Clinic.”

If business hours are not defined for the Clinic selected in the Reschedule To Clinic, the system will invoke a standard error message with the text “The business hours are not defined for the To Clinic.”

If the date specified in the Reschedule to Date is not a defined business day for the Clinic selected in the Reschedule To Clinic dropdown, the system will invoke a standard error message with the text “The reschedule to date is not a defined business day for the Clinic to which the appointments are being rescheduled.”

If the value of the From Start Time is not a defined business hour for the Clinic selected in the Reschedule To Clinic the system will invoke a standard error message with the text “The start time specified is not within the defined business hours for the Clinic to which the appointments are being rescheduled.”

If the value of the From End Time is not a defined business hour for the Clinic selected in the Reschedule To Clinic, the system will invoke a standard error message with the text “The end time specified is not within the defined business hours for the Clinic to which the appointments are being rescheduled.”

If the entire block of minutes between the start and end time is not free for the Clinic selected in the Reschedule To Clinic, the system will invoke a standard error message with the text “The hours specified are not available for the Clinic to which the appointments are being rescheduled.”

A satellite site may not have any records checked out for the Clinic selected in the Reschedule from Clinic dropdown or the Reschedule to Clinic dropdown. If either Clinic is checked out, the system will invoke a standard error message with the text “Appointments cannot be moved while source and/or target Clinic records are checked out.”

8.15.2.3 Appointment Notice Processing

Upon successful completion of data validation, if the Generate Appointment Notice check box is checked and the Now radio button of the When to Generate Notice radio button group is selected, before rescheduling the appointments, the system will invoke the Generate Appointment Notice dialog. (see *Generate Appointment Notice* described later in this document)

Upon selection of the OK button, if the Generate Appointment Notice check box is checked and the Later radio button of the When to Generate Notice radio button group is selected, the system will set the Appointment.QueuedNotice equal to 'Y' and proceed with saving the data. (see Saving the Data for this dialog below)

Upon selection of the OK button, if the Generate Appointment Notice check box is not checked the system will proceed with saving the data. (see Saving the Data for this dialog below)

8.15.2.4 Saving the Data

Upon successful completion of the data validation the system will do the following:

- The system will reschedule the appointments to the rescheduled date entered in the Rescheduled to Date, retaining the same appointment time(s).
- The system will reschedule each appointment with the same duration as the original appointment.

8.15.2.5 Data Map

Control Label	Entity	Attribute	Business Rule
Participant	APPOINTMENT	STATEWICID	
Appt Type	APPOINTMENT	APPOINTMENTTYPEID	
Clinic	APPOINTMENT	SERVICESITEID	
Date	APPOINTMENT	APPOINTMENTDATE	
Time	APPOINTMENT	APPOINTMENTTIME	
Resource	APPOINTMENT	RESOURCEID	
Generate Appointment Notice (later)	APPOINTMENT	QUEUEDNOTICE	

8.16 Event Log for Reschedule Block of Appointments

The Event Log for Reschedule Block of Appointments lists the actions that were taken and any actions that could not be taken as a result of the entries made on the Reschedule Block of Appointments dialog. The event log will list only the most recent actions. The Event Log for Reschedule Block of Appointments dialog is invoked in response to the following user actions:

- Selection of the OK button on the Reschedule Block of Appointments dialog described in earlier in this document

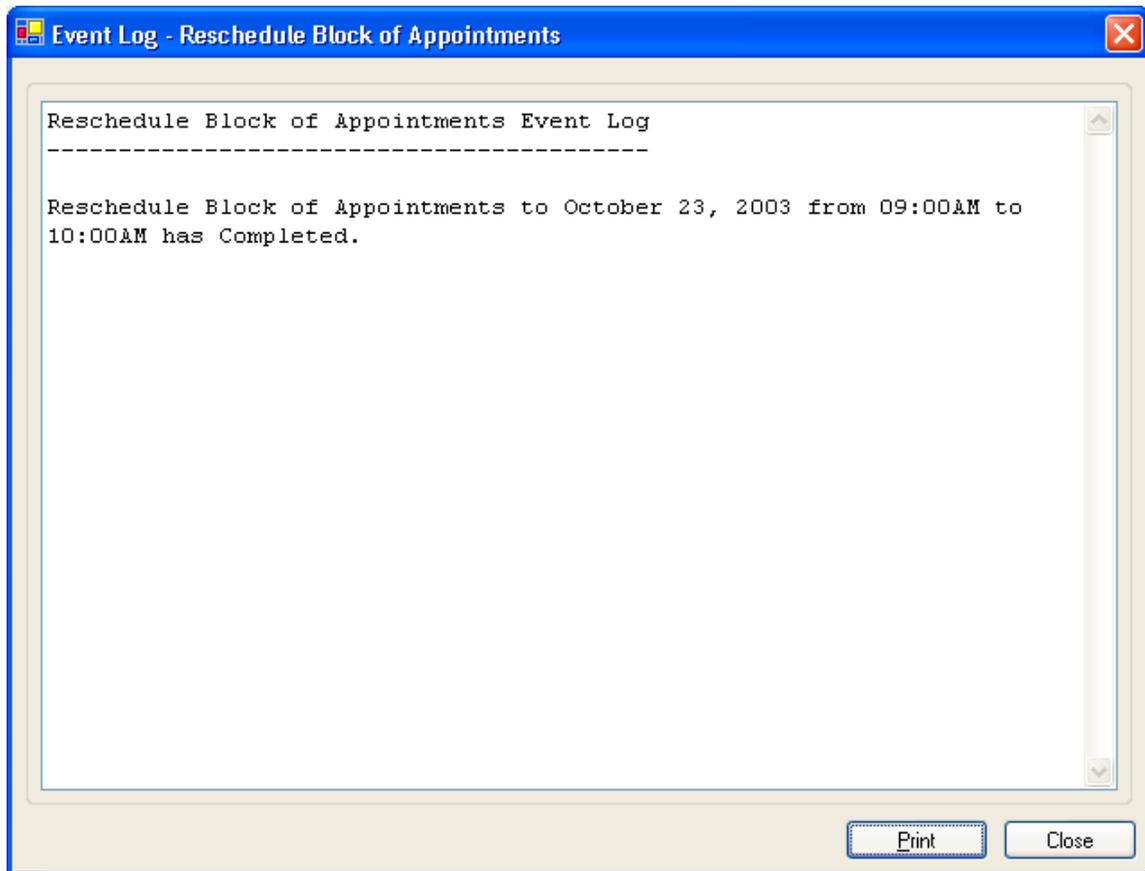


Figure 15 - Event Log for Reschedule Block of Appointments Dialog

8.16.1 Controls

8.16.1.1 Event Log Text Box

The text box will be enabled when the Event Log for Reschedule Block of Appointments dialog is active. It will display the event log generated while defining business days and hours for the Clinic. The contents of the control are read-only. When the text exceeds the bounds of the text box, vertical and horizontal scroll bars will display.

8.16.1.2 Print Button

The Print button will be enabled when the Event Log for Reschedule Block of Appointments dialog is active and the other output printer is selected (refer to System Tools). It has a mnemonic of “P”.

8.16.1.3 Close Button

The Close button will be enabled when the Event Log for Reschedule Block of Appointments dialog is active. Characteristics for the Close button are defined in *Consistencies*.

8.16.2 Processes

8.16.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Event Log – Reschedule Block of Appointments”

Text box displays log message text

8.16.2.2 Print Event Log

Upon selection of the Print button, the system will print the contents of the event log to the default Windows printer.

8.16.2.3 Close Event Log

Upon selection of the Close button, the system will close the Event Log for Reschedule Block of Appointments dialog.

The system returns to the Participant List window.

8.17 Notes for the Day

The Notes for the Day dialog allows notes that have been entered in the Build Master Calendar to be viewed by the Clinic. This dialog is invoked in response to the following user actions:

- Selection of the Notes for Day menu item on the Schedule Appointments for Household dialog described earlier in this document.
- Selection of the Notes button on the Schedule Appointments for Household dialog described earlier in this document.
- Selection of the Notes for Day menu item on the Schedule Group Education Class for Household dialog described earlier in this document.
- Selection of the Notes button on the Schedule Group Education Class for Household dialog described earlier in this document.
- Selection of the Notes for Day menu item on the Reschedule Appointments for Household dialog described earlier in this document.
- Selection of the Notes button on the Reschedule Appointments for Household dialog described earlier in this document.
- Selection of the Notes for Day menu item on the Reschedule Group Education Class for Household dialog described earlier in this document.
- Selection of the Notes button on the Reschedule Group Education Class for Household dialog described earlier in this document.

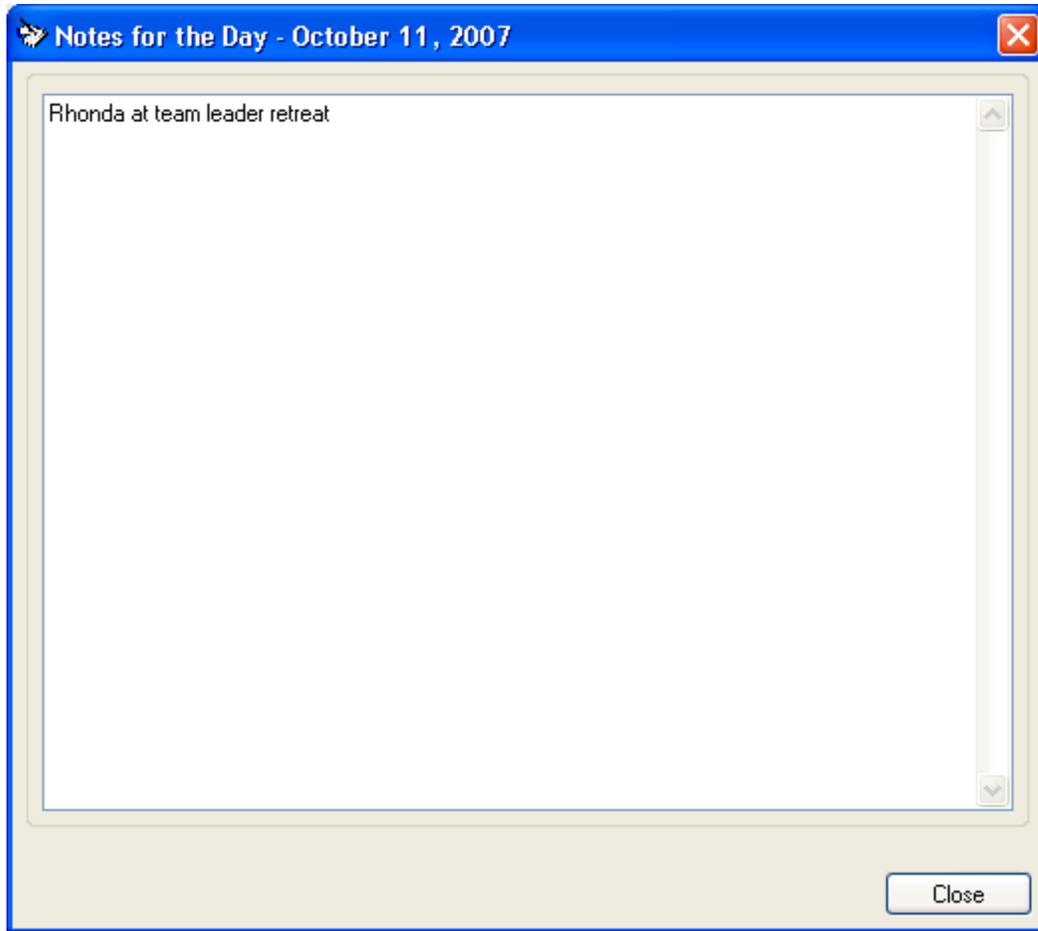


Figure 16– Notes for the Day Dialog

8.17.1 Controls

8.17.1.1 Notes for Day text box

The text box will be enabled when the Notes for the Day dialog is active. The information in this text box is read-only.

8.17.1.2 Close Button

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

8.17.2 Processes

8.17.2.1 Initializing the Interface

The dialog title bar will display “Notes for the Day – “ + the date of the Note

The Notes for Day text box will display the text from BusinessDay.Notes for the selected date.

8.17.2.2 Close

Upon selection of the Close button, the system will close the Notes for the Day dialog and return to the calling window.

8.18 Missed Appointments Follow-up

The Missed Appointments Follow-up dialog allows the user to view a list of participants who missed their appointment and perform follow-up steps. This dialog is invoked when the user selects the Missed Appointments Follow-up menu item on the Activities menu described in *Clinic Chapter 06 - Search-Selection*.

Appointment Date	State WIC ID	Participant Name	WIC Category	Appointment Type
11/03/2004	12956045	Janet M. Fitzgerald	Breastfeeding	Initial Certification
11/03/2004	07345912	Johnny Q. Reginsky	Child	Medical Update
11/05/2004	12956045	Melissa X. Fitzgerald	Breastfeeding	Subsequent Certification
11/05/2004	00034783	Margaret H. Thomlinson	Non-breastfeeding	Initial Certification
11/08/2004	00329378	Pauline A. Brownstone	Infant	Initial Certification
11/12/2004	04584511	Reshetta P. Metcalf	Non-breastfeeding	Individual Nutrition Education/Check Pi

Figure 17 - Missed Appointments Follow-up Dialog

8.18.1 Controls

8.18.1.1 Appointment Date Range From (From)

This control allows the user to enter the start date of the date range on which to filter the Missed Appointments display grid. The masked edit box will be enabled when the Missed Appointments Follow-up 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.

8.18.1.2 Appointment Date Range To (To)

This control allows the user to enter the end date of the date range on which to filter the Missed Appointments display grid. The masked edit box will be enabled when the Missed Appointments Follow-up 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.

8.18.1.3 Sort Order Radio Button Group

This control allows the user to select the sort order for the Missed Appointments display grid. The radio button group will be enabled when the Missed Appointments Follow-up dialog is active. It consists of the following radio buttons:

- Ascending
- Descending

8.18.1.4 Infant Check Box

The Infant check box will be enabled when the Missed Appointments Follow-up dialog is active.

8.18.1.5 Child Check Box

The Child check box will be enabled when the Missed Appointments Follow-up dialog is active.

8.18.1.6 Pregnant Check Box

The Infant check box will be enabled when the Missed Appointments Follow-up dialog is active.

8.18.1.7 Breastfeeding Check Box

The Breastfeeding check box will be enabled when the Missed Appointments Follow-up dialog is active.

8.18.1.8 Non-breastfeeding Check Box

The Non-breastfeeding check box will be enabled when the Missed Appointments Follow-up dialog is active.

8.18.1.9 Apply Criteria Button

The Apply Criteria button will be enabled when the Missed Appointments Follow-up dialog is active. It has a mnemonic of “A”.

8.18.1.10 Missed Appointments Display Grid

The display grid will be enabled when the Missed Appointments Follow-up dialog is active. It consists of the following columns and values:

- Appointment Date
- State WIC ID
- Participant Name
- WIC Category
- Appointment Type
- Follow-up Completed
- Follow-up Date
- Follow-up Comments

The grid will display the applicants who missed their scheduled appointment and fit the selected criteria. The entries in the grid will be sorted by the Appointment Date column in the order selected in the Sort Order radio button group. The values on the grid are read-only.

8.18.1.11 Current Date Text and Value Label

The value label will be enabled when the Missed Appointments Follow-up dialog is active. It will display the current system date. It will display in the inverse color of the form.

8.18.1.12 Print Button

The Print button will be enabled when the Missed Appointments Follow-up dialog is active and there are entries in the Missed Appointments display grid. It has a mnemonic of "P".

8.18.1.13 Follow-up Button

The Follow-up button will be enabled when the Missed Appointments Follow-up dialog is active and an entry is selected in the Missed Appointments display grid. It has a mnemonic of "F".

8.18.1.14 View Comments Button

The View Comments button will be enabled when the Missed Appointments Follow-up dialog is active and an entry is selected in the Missed Appointments display grid. It has a mnemonic of "V".

8.18.1.15 Close Button

The Close button will be enabled when the Missed Appointments Follow-up dialog is active. Characteristics for the Close button are defined in *Consistencies*.

8.18.2 Processes

8.18.2.1 *Initializing the Interface*

Upon initial presentation of the dialog, the title bar text will be set to “Missed Appointments Follow-up”

The Appointment Date Range From masked edit box will be initially blank.

The Appointment Date Range To masked edit box will be initially blank.

The Ascending radio button will be selected.

The Missed Appointments display grid will initially be empty.

8.18.2.2 *Edits*

Upon selection of the Apply Criteria button:

The system will invoke a standard error message with the text “An entry is required in the {control label}” if an entry is not made in the following controls:

- Appointment Date Range From
- Appointment Date Range To

If a selection is not made in the Sort Order radio button group, the system will invoke a standard error message with the text “Please select a sort order.”

If a selection is not made in at least one of the WIC Category check boxes, the system will invoke a standard error message with the text “Please select at least one of the WIC Categories.”

8.18.2.3 *Apply Criteria*

Upon selection of the Apply Criteria button, the system will refresh the information in the Missed Appointments Follow-up display grid.

8.18.2.4 *Print*

Upon selection of the Print button, if an entry is not selected in the Missed Appointments display grid, the system will invoke a standard error message with the text “Please select an applicant from the grid.”

If all edits are satisfied, the system will invoke the Missed Appointment Follow-up Report dialog.

8.18.2.5 Follow-up

Upon selection of the Follow-up button, if an entry is not selected in the Missed Appointments display grid, the system will invoke a standard error message with the text “Please select an applicant from the grid.”

If all edits are satisfied, the system will invoke the Follow-up Information dialog.

8.18.2.6 View Comments

Upon selection of the View Comments button, if an entry is not selected in the Missed Appointments display grid, the system will invoke a standard error message with the text “Please select an applicant from the grid.”

If all edits are satisfied, the system will invoke the View Prescreening Comments dialog.

8.19 Generate Missed Appointments Follow-up Report

The Generate Missed Appointments Follow-up Report dialog allows the user to generate a report listing the participants who missed their scheduled appointment during the date range selected on the [Missed Appointments Follow-up](#) dialog. It is invoked when the user selects the Print button on the [Missed Appointments Follow-up](#) dialog.

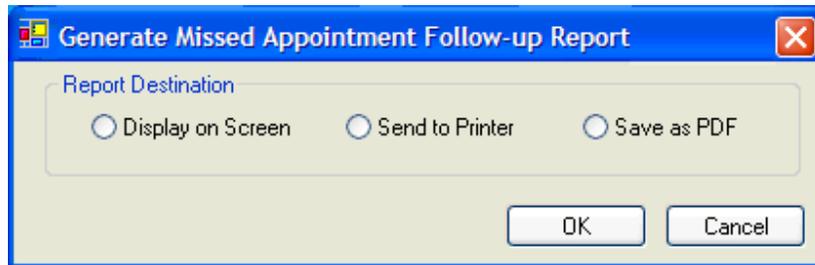


Figure 18 – Generate Missed Appointments Follow-up Report dialog

8.19.1 Controls

8.19.1.1 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 Missed Appointments Follow-up Report dialog is active.

8.19.1.2 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 Missed Appointments Follow-up Report dialog. The button will be enabled when the Generate Missed Appointments Follow-up Report dialog is active. Characteristics for the OK button are defined in *Consistencies*.

8.19.1.3 Cancel Button

This control allows the user to exit the Generate Missed Appointments Follow-up Report dialog without generating a report. The button will be enabled when the Generate Missed Appointments Follow-up Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.19.2 Processes

8.19.2.1 Initializing the Interface

Upon initial presentation of the dialog, the title bar text will be set to “Generate Missed Appointments Follow-up Report”

The Display on Screen radio button will be selected.

8.19.2.2 Generate Initial Certification Processing Standards Report

Upon selecting the OK button the system will generate the Missed Appointments Follow-up 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.

8.20 Missed Appointments Follow-up Report (Output) CLN0??

This report allows the user to print a list of applicants who missed their scheduled appointment during the given date range. The report is generated from the Generate Missed Appointments Follow-up Report dialog.

CLN0XXX
 <STAFF NAME>

<REPORT HEADING>
 MISSED APPOINTMENTS
 11/01/2000 - 11/12/2000

RUN DATE: XX/XX/XXXX
 RUN TIME: XX:XX:XX
 PAGE: XXX

Clinic: 001 - WIC Clinic

HOUSEHOLD ID	STATE WIC ID	PARTICIPANT NAME ADDRESS TELEPHONE NUMBER	WIC CATEGORY	APPOINTMENT DATE	APPOINTMENT TYPE
01111111	01111111	FIRST M. LAST 123 STREET CITY, STATE 99999-9999 999-999-9999	P	11/01/2000	INDIVIDUAL NUTRITION EDUCATION
09283422	01238442	JANET M. BABBAGE 123 STREET CITY, STATE 99999-9999 999-999-9999	B	11/01/2000	SUBSEQUENT CERTIFICATION
	01238448	BOBBY R. BABBAGE	I	11/01/2000	MEDICAL UPDATE
09364738	01239451	ANNA L. PASTUR 123 STREET CITY, STATE 99999-9999 999-999-9999	P	11/02/2000	SUBSEQUENT CERTIFICATION
	01239457	REBECA R. PASTUR	C	11/11/2000	MEDICAL UPDATE
	01239458	JENNA B. PASTUR	C	11/11/2000	MEDICAL UPDATE

*** END OF LISTING ***

8.20.1 Data Elements

8.20.1.1 Household ID

8.20.1.1.1 Origin of Data Element

The value will be taken from the Household.HouseholdID.

8.20.1.1.2 Format

The value will print as its literal value.

8.20.1.2 State WIC ID

8.20.1.2.1 Origin of Data Element

This value comes from the Member.StateWICID.

8.20.1.2.2 Format

The value will print as its literal value.

8.20.1.3 Client Name

8.20.1.3.1 Origin of Data Element

The value will be taken from the Member.FirstName
Member.MiddleInitial and Member.LastName.

8.20.1.3.2 Format

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

8.20.1.4 Client Address

8.20.1.4.1 Origin of Data Element

The value will be taken from the Household.Address, Household.City,
Household.State, and Household.ZIP.

8.20.1.4.2 Format

The value will print in the following format:

{address}
{city}, {state} {ZIP code}

The ZIP code will print in #####-#### format.

8.20.1.5 Client Telephone Number

8.20.1.5.1 Origin of Data Element

The value will be taken from the Household.Telephone1.

8.20.1.5.2 Format

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

8.20.1.6 WIC Category

8.20.1.6.1 Origin of Data Element

The value will be taken from the Member.WICStatus.

8.20.1.6.2 Format

The value will print as its literal value.

8.20.1.7 Appointment Date

8.20.1.7.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentDate.

8.20.1.7.2 Format

This is an eight-digit value formatted MM/DD/CCYY.

8.20.1.8 Appointment Type

8.20.1.8.1 Origin of Data Element

The value will be taken from the AppointmentType.Description.

8.20.1.8.2 Format

The value will print as its literal value.

8.20.2 Filter Criteria

8.20.2.1 Base of Data

All applicants who missed their scheduled appointment and fit the criteria selected on the [Missed Appointments Follow-up](#) dialog will be included on the report.

8.20.3 Sort Order

8.20.3.1 Household ID

The report will be sorted first by Household ID.

8.20.3.2 Appointment Date

The report will be sorted in chronological order by Appointment Date within Household ID.

8.20.4 Control Breaks

8.20.4.1 Clinic

A page break will occur at the change of Clinic.

8.20.5 Grand Total

Grand totals have not been defined for this report.

8.21 Follow-up Information

The Follow-up Information dialog allows the user to indicate that a follow-up contact with the applicant was completed. It is invoked when the user selects the Follow-up button on the Missed Appointments for Initial Certification dialog.



Figure 19 – Follow-up Information Dialog

8.21.1 Controls

8.21.1.1 Applicant Name Value Label

The value label will display the Member.LastName, Member.FirstName, and Member.MiddleInitial for the selected applicant in the [Missed Appointments for Initial Certification Display Grid](#). It will display in the inverse color of the form.

8.21.1.2 Applicant Mailing Address Value Label

The value label will display the Household.MailAddress for the selected applicant in the [Missed Appointments for Initial Certification Display Grid](#). It will display in the inverse color of the form.

8.21.1.3 Applicant Mailing City Value Label

The value label will display the Household.MailCity for the selected applicant in the [Missed Appointments for Initial Certification Display Grid](#). It will display in the inverse color of the form.

8.21.1.4 Applicant Mailing State Value Label

The value label will display the Household.MailState for the selected applicant in the [Missed Appointments for Initial Certification Display Grid](#). It will display in the inverse color of the form.

8.21.1.5 Applicant Mailing Zip Value Label

The value label will display the Household.MailZIP for the selected applicant in the [Missed Appointments for Initial Certification Display Grid](#). It will display in the inverse color of the form.

8.21.1.6 Applicant Telephone Number Value Label

The value label will display the Household.Telephone1 for the selected applicant in the [Missed Appointments for Initial Certification Display Grid](#). It will display in the inverse color of the form.

8.21.1.7 Follow-up Completed Check Box

The Follow-up Completed check box will be enabled when the Follow-up Information dialog is active.

Upon removing the mark from the Follow-up Completed check box, the following controls will be blanked and disabled:

- Follow-up Date

8.21.1.8 Follow-up Date Masked Edit Box

The masked edit box will be enabled when the Follow-up Completed check box is marked. It will only accept entry of numeric digits. The mask on the box will be “##/###/####” to accept a date with a four-digit year.

8.21.1.9 Comments Text Box

The text box will be enabled when the Follow-up Information dialog is active. When the text exceeds the bounds of the text box a vertical scroll bar will display.

8.21.1.10 *Print Notice Check Box*

The Print Notice check box will be enabled when the Follow-up Information dialog is active.

8.21.1.11 *OK Button*

The button will be enabled when the Follow-up Information dialog is active (see *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

8.21.1.12 *Cancel Button*

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

8.21.2 Processes

8.21.2.1 *Initializing the Interface*

Upon initial presentation of the dialog, the title bar text will be set to “Follow-up Information”

The contact information will display the contact information from the record selected on the Missed Appointments Follow-up dialog as follows:

- Member.FirstName Member.MiddleInitial Member.LastName
- Household.Address
- Household.City, Household.State Household.ZIP

The following controls will be initially blank:

- Follow-up Completed check box
- Comments text box
- Print Notice check box

8.21.2.2 *Edits*

Upon selecting the OK button, if Follow-up Completed check box is marked and an entry is not made in the Follow-up Date masked edit box, the system will invoke a standard error message with the text “An entry is required for the {control label}.”

8.21.2.3 *Saving the Data*

Upon successful completion of the above-listed edits, the system will save the values to the database as defined in the Data Map below.

If the Print Notice check box is marked, the system will invoke the Generate Appointment Notice dialog (see Generate Appointments Notice section of this document).

If invoked, upon returning from the Generate Appointments Notice dialog, the system will return to the Missed Appointments for Initial Certification dialog.

If the Print Notice check box is not marked, the system will return to the Missed Appointments for Initial Certification dialog and refresh the Missed Appointments for Initial Certification Display Grid.

8.21.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the Follow-up Information dialog and return to the Missed Appointments for Initial Certification dialog.

8.21.2.5 Data Map

Control Label	Entity	Attribute	Business Rule
Follow-up Completed	APPOINTMENT	FollowupCompleted	
Follow-up Date	APPOINTMENT	FollowupDate	
Comments	APPOINTMENT	FollowupComment	
Print Notice	Appointment	NoticePrinted	

8.22 View Prescreening Comments

The View Prescreening Comments dialog allows the user to view the comments that were entered when the applicant was prescreened. It is invoked when the user selects the View Comments button on the Missed Appointments for Initial Certification dialog.

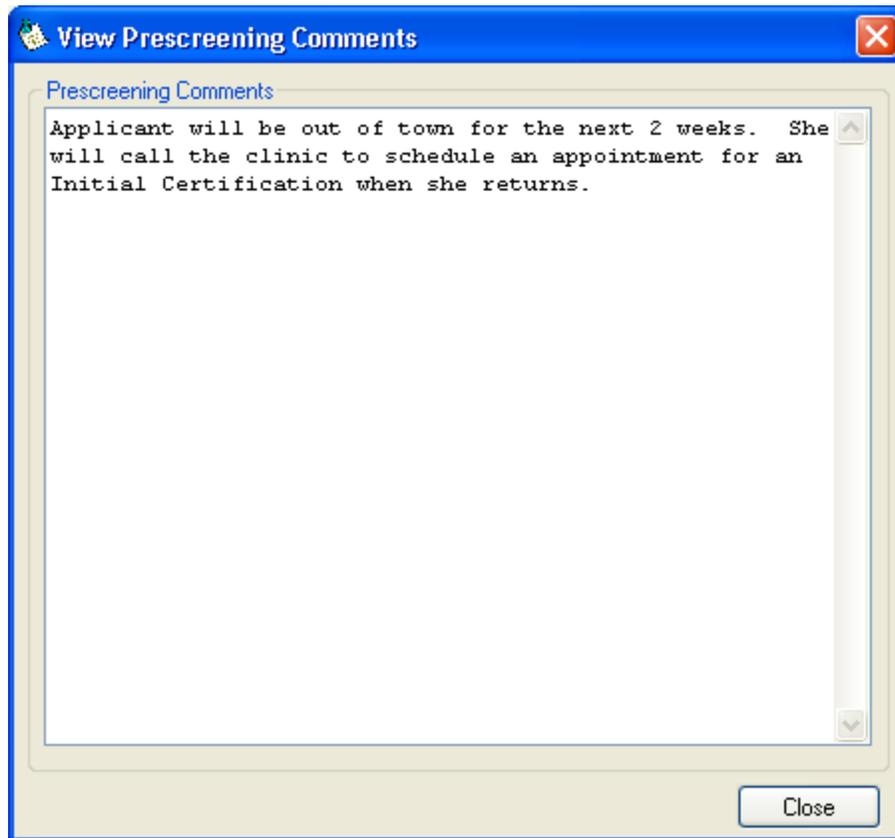


Figure 20– View Prescreening Comments Dialog

8.22.1 Controls

8.22.1.1 Prescreening Comments Text Box

The text box will be enabled when the View Prescreening Comments dialog is active. The information in this text box is read-only. The value will come from the Appointment.FollowupComments.

8.22.1.2 Close Button

The Close button will be enabled when the View Prescreening Comments dialog is active. Characteristics for the Close button are defined in *Consistencies*.

8.22.2 Processes

8.22.2.1 Initializing the Interface

Upon initial presentation of the dialog, the title bar text will be set to “View Prescreening Comments”

The Prescreening Comments text box will display the comments that were entered when the applicant was prescreened. The value will come from the Appointment.FollowupComments.

8.22.2.2 Close

Upon selection of the Close button, the system will close the View Prescreening Comments dialog and return to the calling window.

8.23 Generate Appointment Notice

The Generate Appointment Notice dialog allows the user to generate an appointment notice for a single participant. The user may also generate an address label for the appointment notice. This dialog is invoked in response to the following user actions:

- Selection of the Schedule Appointment menu item while the Now radio button is selected on the Schedule Appointments for Household dialog described earlier in this document.
- Selection of the OK button while the Now radio button is selected on the Schedule Appointments for Household dialog described earlier in this document.
- Selection of the Enroll in Class menu item while the Now radio button is selected on the Schedule Group Education Class for Household dialog described earlier in this document.
- Selection of the OK button while the Now radio button is selected on the Schedule Group Education Class for Household dialog described earlier in this document.
- Selection of the Print Appointment Notice menu item on the Appointments menu on the View Appointments for Date dialog described earlier in this document
- Selection of the Print Notice button on the View Appointments for Date dialog described earlier in this document.
- Selection of the Print Appointment Notice button on the Appointments tab of the Participant Folder described earlier in this document.
- Selection of the Yes button while the Now radio button is selected on the Confirm Appointment Rescheduling dialog described earlier in this document.
- Selection of the Yes button while the Now radio button is selected on the Confirm Group Education Class Rescheduling dialog described earlier in this document.
- Selection of the OK button while the Now radio button is selected on the Reschedule Block of Appointments dialog described earlier in this document.

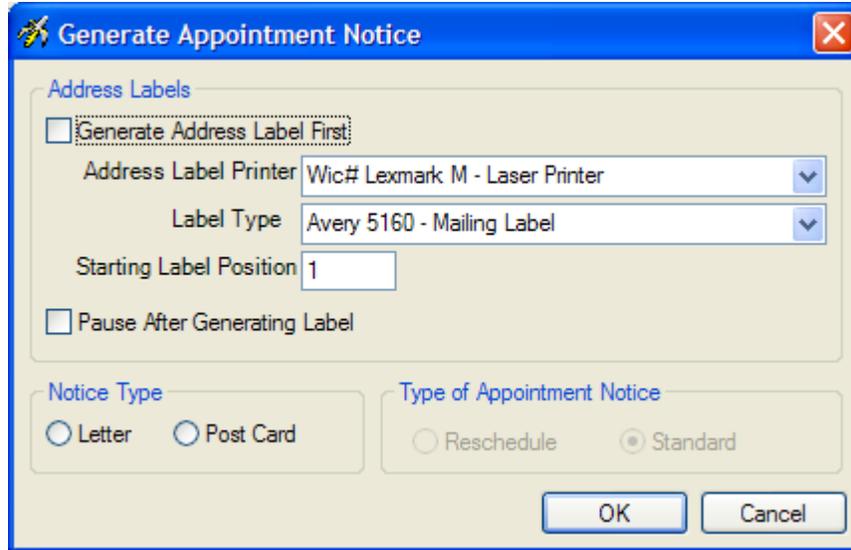


Figure 21 - Generate Appointment Notice Dialog

8.23.1 Controls

8.23.1.1 Generate Address Label First Check Box

The check box will be enabled when the Generate Appointment Notice dialog is active. Upon removing the check mark, the following controls will be cleared and disabled:

- Address Label Printer dropdown
- Label Type dropdown
- Starting Label Position text box
- Pause after Generating Label check box

8.23.1.2 Address Label Printer Dropdown

The dropdown will be enabled when the Generate Address Label First check box is marked. The dropdown will display an entry for each defined label or other output printer for the system that is currently active. When enabled by checking the Generate Address Labels First check box, the field will default to blank.

8.23.1.3 Label Type Dropdown

The dropdown will be enabled when a printer is selected from the Address Label Printer dropdown. It will contain a list of label types from the ReferenceDictionary entity where Category equals 'LaserLabels'.

8.23.1.4 Starting Label Position Text Box

The control will be enabled when a laser printer is selected in the Address Label Printer dropdown. The control allows entry of numeric digits. The minimum value is 1 and the maximum value is the number of labels available on the selected label type.

8.23.1.5 Pause after Generating Label Check Box

The check box will be enabled when the Generate Address Label First check box is marked.

8.23.1.6 Notice Type Radio Button Group

The radio button group will be enabled when the Generate Appointment Notice dialog is active. It consists of the following radio buttons:

- Letter
- Postcard

8.23.1.7 Type of Appointment Notice Radio Button Group

The radio button group consists of the following radio buttons:

- Reschedule
- Standard

8.23.1.8 OK Button

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

8.23.1.9 Cancel Button

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

8.23.2 Processes

8.23.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Generate Appointment Notice”.

The Generate Address Label First will initially be blank

The Address Label Printer dropdown will initially be disabled and blank

The Label Type dropdown will initially be disabled and blank

The Starting Label Position will initially be disabled and blank

The Pause after Generating Label check box will initially be disabled and checked.

The Letter radio button in the Notice Type radio button group will initially be selected.

The Standard radio button in the Type of Appointment Notice Radio Button Group will initially be selected and the radio button group will be disabled with the exception of the following:

- The Reschedule radio button in the Type of Appointment Notice Radio Button Group will initially be selected if the Generate Appointment notice is invoked from the following:
 - Confirm Appointment Rescheduling dialog
 - Confirm Group Education Class Rescheduling dialog
 - Reschedule Block of Appointments dialog
- The Standard radio button in the Type of Appointment Notice Radio Button Group will be disabled if the Generate Appointment notice is invoked from the following:
 - Confirm Appointment Rescheduling dialog
 - Confirm Group Education Class Rescheduling dialog
 - Reschedule Block of Appointments dialog

8.23.2.2 Edits

Upon selection of the OK button, if an entry is not made in the Notice Type radio button group, the system will invoke a standard error message with the text “A selection is required for the {control label}”.

If the value entered in the Starting Label Position text box is greater than the number of labels available on the selected label type, the system will invoke a standard error message with the text “Starting Label range is 1 through xx” where xx is the number of labels available on the selected label type.

If the Generate Address Labels First check box is selected and a selection is not made in the following:

- Address Label Printer dropdown
- Label Type dropdown

The system will invoke a standard error message with the text, “A selection is required in the {control label}.”

If a laser printer is selected from the Address Label Printer dropdown, and a selection is not made in the Starting Label Position text box, the system will invoke a standard error message with the text “An entry is required for the Starting Label Position.”

8.23.2.3 Appointment Notice Processing

Upon successful completion of data validation, if the Generate Address Labels check box is marked, the system will generate address labels. The criteria for generating the address labels as well as the format of the labels are described in the Outputs section in this document.

If the Pause after Generating Label check box is marked, the system will invoke a standard error message with the text “Load postcards or paper for appointment notices and press OK when ready.”

The system will generate the appointment notice(s). The format of the notice is described in the Outputs section this document.

8.24 Generate Queued Appointment Notices and Address Labels

The Generate Queued Appointment Notices dialog allows the user to generate all appointment notices that have been queued for later production. The user may also generate address labels for all recipients of these appointment notices. This dialog is invoked when the user selects the Queued Appointment Notices list item from the Generate Documents dialog described in *Clinic Chapter 13 - System Outputs*.

The screenshot shows the 'Generate Queued Appointment Notices' dialog box. It features a blue title bar with a close button. The main area is divided into several sections: 'Date Range' with 'From' and 'To' masked edit boxes; a 'Refresh' button and a status indicator '0 Appointment notices queued for production'; 'Address Labels' section with a checked 'Generate Address Label First' checkbox, a dropdown for 'Address Label Printer' (Wic# Lexmark M - Laser Printer), a dropdown for 'Label Type' (Avery 5160 - Mailing Label), a text box for 'Starting Label Position' (1), and a checked 'Pause After Generating Label' checkbox; 'Notice Type' section with radio buttons for 'Letter' (selected) and 'Post Card'; and 'Type of Appointment Notice' section with radio buttons for 'Reschedule' and 'Standard' (selected). 'OK' and 'Cancel' buttons are at the bottom right.

Figure 22 - Generate Queued Appointment Notices Dialog

8.24.1 Controls

8.24.1.1 From Date Masked Edit Box

The masked edit box will be enabled when the Generate Queued Appointment Notices 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.

8.24.1.2 To Date Masked Edit Box

The masked edit box will be enabled when the Generate Queued Appointment Notices 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.

8.24.1.3 Refresh Button

The button will be enabled when the Generate Queued Appointment Notices dialog is active. It will have a mnemonic of “R”.

8.24.1.4 Count of Appointment Notices Queued for Production Value Label and Text (Appointment Notices Queued for Production)

The value label will display the number of appointments queued for later production. It will display in the inverse color of the form.

8.24.1.5 Generate Address Label First Check Box

The control will be enabled when the Generate Queued Appointment Notices dialog is active.

Upon removing the mark from the Generate Address Label First check box, the following controls will be emptied and disabled:

- Address Label Printer dropdown
- Label Type dropdown
- Starting Label Position text box
- Pause after Generating Labels check box

8.24.1.6 Address Label Printer Dropdown

The dropdown will be enabled when the Generate Address Label First check box is marked. The dropdown will display an entry for each defined label or other output printer for the system that is currently active. When enabled by checking the Generate Address Labels First check box, the field will default to blank.

8.24.1.7 Label Type Dropdown

The dropdown will be populated when a printer is selected from the Address Label Printer dropdown. It will contain a list of label types from the reference dictionary table of the lookup database appropriate for the label printer selected in the Address Label Printer dropdown. When enabled by checking the Generate Address Labels First check box, the field will default to blank.

8.24.1.8 Starting Label Position Text Box

The control will be enabled when a laser printer is selected from the Address Label Printer dropdown. The control allows entry of numeric digits. The minimum value is 1 and the maximum value is the number of labels available on the selected label type. When enabled by checking the Generate Address Labels First check box, the field will default to 1.

8.24.1.9 Pause after Generating Labels Check Box

The check box will be enabled when the Generate Address Label First check box is marked. When enabled by checking the Generate Address Labels First check box, the field will default as checked.

8.24.1.10 Notice Type Radio Button Group

The radio button group will be enabled when the Generate Queued Appointment Notices dialog is active. It consists of the following radio buttons:

- Letter
- Postcard

The Letter radio button will initially be marked.

8.24.1.11 Type of Appointment Notice Radio Button Group

The radio button group consists of the following radio buttons:

- Reschedule
- Standard

The radio button group will be disabled and the Standard radio button marked when the Generate Queued Appointment Notices dialog is active.

8.24.1.12 OK Button

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

8.24.1.13 Cancel Button

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

8.24.2 Processes

8.24.2.1 *Initializing the Interface*

Upon initial display, set the title bar text to “Generate Queued Appointment Notices”.

The From date will be initially blank

The To date will be initially blank

The Count of Appointment Notices Queued for Production text will initially display “???”

The Generate Address Label First check box will be initially blank.

The Address Label Printer dropdown, Label Type dropdown, Starting Label Position text box and Pause after Generating Labels check box are initially disabled.

The Letter radio button in the Notice Type radio button group will initially be selected.

The Type of Appointment Notice Radio Button Group will be initially disabled.

The Standard radio button will initially be selected.

8.24.2.2 *Edits*

Upon selection of the OK button, if an entry is not made in the following

- From Date Masked Edit Box
- To Date Masked Edit Box
- Notice Type radio button group

The system will invoke a standard error message with the text “An entry is required for the {control label}”.

If an invalid date is entered in a date control, the system will invoke a standard error message with the text “Invalid date entered.”

If the value of the Date Range From masked edit box is equal to or less than the current system date, the system will invoke a standard error message with the text, “Date entered must be greater than today’s date.”

If the value of the Date Range To masked edit box is equal to or less than the current system date, the system will invoke a standard error message with the text, “Date entered must be greater than today’s date.”

If the Date Range From masked edit box is greater than the Date Range To masked edit box, 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.”

The value entered in the Starting Label Position text box must not be greater than the number of labels available on the selected label type or the system will invoke a standard error message with the text “Starting Label range is 1 through xx” where xx is the number of labels available on the selected label type.

If the Generate Address Labels First check box is selected and no selection is made in the following:

- Address Label Printer dropdown
- Label Type dropdown

The system will display a standard message, “A selection is required for the {control label}.”

If a laser printer is selected and the Starting Label Position text box is blank, the system will display a standard message, “An entry is required for the Starting Label Position.”

The Count of Appointment Notices Queued for Production text will be updated with the count of notices found to print. If the count of notices found is zero, the system will invoke a standard error message with the text “No notices were found to print for the specified date range.”

8.24.2.3 Appointment Notice Processing

Upon successful completion of data validation, if the Generate Address Labels check box is marked, the system will generate address labels. The criteria for generating the address labels as well as the format of the labels are described in the Outputs section in this document.

If the Pause after Generating Label check box is marked, the system will invoke a standard error message with the text “Load postcards or paper for appointment notices and press OK when ready.”

The system will generate the appointment notice(s). The format of the notice is described in the Outputs section this document.

The Count of Appointment Notices Queued for Production text will be updated with the count of notices found to print. If no queued appointment notices were found, the system will invoke a standard error message with the text “No notices were found to print for the specified date range.”

8.24.2.4 Refresh Button Processing

Upon successful completion of data validation, the Count of Appointment Notices Queued for Production text will be updated with the count of notices found to print.

8.25 Generate Missed Appointment Notices and Address Labels

The Generate Missed Appointment Notices dialog allows the user to generate missed appointment reminder notices for all missed appointments. The user may also generate address labels for all recipients of these notices. This dialog is invoked when the user selects the Missed Appointment Notices list item from the Documents display list described in Clinic *Chapter 13 - System Outputs*.

The screenshot shows the 'Generate Missed Appointment Notices' dialog box. It features a blue title bar with a yellow lightning bolt icon and a close button. The main area is divided into several sections: 'Date Range' with 'From' and 'To' masked edit boxes; a 'Refresh' button and a status indicator '0 Missed appointment notices to be generated'; 'Address Labels' section with a checked 'Generate Address Label First' checkbox, dropdowns for 'Address Label Printer' (Wic# Lexmark M - Laser Printer) and 'Label Type' (Avery 5160 - Mailing Label), a 'Starting Label Position' text box (value 1), and a checked 'Pause After Generating Label' checkbox; 'Notice Type' section with radio buttons for 'Letter' (selected) and 'Post Card'; and 'Type of Appointment Notice' section with radio buttons for 'Reschedule' and 'Standard' (selected). 'OK' and 'Cancel' buttons are at the bottom right.

Figure 23 - Generate Missed Appointment Notices Dialog

8.25.1 Controls

8.25.1.1 From Date Masked Edit Box

The masked edit box will be enabled when the Generate Missed Appointment Notices 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.

8.25.1.2 To Date Masked Edit Box

The masked edit box will be enabled when the Generate Missed Appointment Notices 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.

8.25.1.3 Refresh Button

The button will be enabled when the Generate Missed Appointment Notices dialog is active. It will have a mnemonic of “R”.

8.25.1.4 Count of Missed Appointment Notices to be Generated Value Label and Text (Missed Appointment Notices to be Generated)

The value label will display the number of appointments with an appointment date in the past whose Appointment-Kept-Flag attribute has been set to False. The value label will display in the inverse color of the form.

8.25.1.5 Generate Address Label First Check Box

The control will be enabled when the Generate Missed Appointment Notices dialog is active.

Upon removing the mark from the Generate Address Label First check box, the following controls will be blanked and disabled:

- Address Label Printer dropdown
- Label Type dropdown
- Starting Label Position text box
- Pause after Generating Labels check box

8.25.1.6 Address Label Printer Dropdown

The dropdown will be enabled when the Generate Address Label First check box is marked. The dropdown will display an entry for each defined label or other output printer for the system that is currently active. When enabled, the dropdown is initially blank.

8.25.1.7 Label Type Dropdown

The dropdown will be populated when a printer is selected from the Address Label Printer dropdown. It will contain a list of label types from the reference dictionary table of the lookup database appropriate for the label printer selected in the Address Label Printer dropdown. When enabled, the dropdown is initially blank.

8.25.1.8 Starting Label Position Text Box

The control will be enabled when a laser printer is selected from the Address Label Printer dropdown. The control allows entry of numeric digits. The minimum value is 1 and the maximum value is the number of labels available on the selected label type. When enabled, the value is initially 1.

8.25.1.9 Pause after Generating Labels Check Box

The check box will be enabled when the Generate Address Label First check box is marked.

8.25.1.10 Notice Type Radio Button Group

The radio button group will be enabled when the Generate Missed Appointment Notices dialog is active. It consists of the following radio buttons:

- Letter
- Postcard

8.25.1.11 Type of Appointment Notice Radio Button Group

The radio button group consists of the following radio buttons:

- Reschedule
- Standard

The radio button group will be disabled and the Standard radio button marked when the Generate Missed Appointment Notices dialog is active.

8.25.1.12 OK Button

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

8.25.1.13 Cancel Button

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

8.25.2 Processes

8.25.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Generate Missed Appointment Notices”.

The Date Range From masked edit box will initially be blank

The Date Range To masked edit box will initially be blank

The count for Missed appointment notices to be generated will initially display “??”

The Generate Address Label First will initially be blank

The Address Label Printer dropdown will initially be disabled and blank

The Label Type dropdown will initially be disabled and blank

The Starting Label Position will initially be disabled and blank

The Pause after Generating Label check box will initially be disabled and checked.

The Letter radio button in the Notice Type radio button group will be initially selected.

The Standard radio button in the Type of Appointment Notice Radio Button Group will initially be selected and the radio button group will be disabled.

8.25.2.2 Edits

Upon selection of the OK button, if an entry is not made in the following controls:

- From Date Masked Edit Box
- To Date Masked Edit Box
- Notice Type radio button group

the system will invoke a standard error message with the text “An entry is required for the {control label}”.

If an invalid date is entered in a date control, the system will invoke a standard error message with the text “Invalid date entered.”

The values of the From and To Date masked edit boxes must be less than the current system date or the system will invoke a standard error message with the text “Date Range must be less than today’s date.”

The From date masked edit box value must be greater than the To date masked edit box value or 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.”

The value entered in the Starting Label Position text box must not be greater than the number of labels available on the selected label type or the system will invoke a standard error message with the text “Starting Label range is 1 through xx” where xx is the number of labels available on the selected label type.

If the Generate Address Labels First check box is selected and a selection is not made in the following:

- Address Label Printer dropdown
- Label Type dropdown

The system will invoke a standard error message with the text, “A selection is required in the {control label}.”

If a laser printer is selected from the Address Label Printer dropdown, and an entry is not made in the Starting Label Position text box, the system will invoke a standard error message with the text, “An entry is required for the {control label}.”

The Count of Missed Appointment Notices to be Generated text will be updated with the count of notices found to print. If the count of notices found is zero, the system will invoke a standard error message with the text “No notices were found to print for the specified date range.”

8.25.2.3 Missed Appointment Notice Processing

Upon successful completion of data validation, the system will generate address labels for all recipients of the appointment notices. The criteria for generating the address labels as well as the format of the labels are described later in this document.

If the Pause after Generating Labels check box is marked, the system will invoke a standard error message with the text “Load postcards or paper for appointment notices and press OK when ready.”

After the possible generation of address labels and pausing for media change, the system will generate appointment notices. The format of the notices is described later in this document.

The Count of Missed Appointment Notices to be Generated text will be updated with the count of notices found to print. If no queued appointment notices were found, the system will invoke a standard error message with the text “No notices were found to print for the specified date range.”

8.25.2.4 Refresh Button Processing

Upon successful completion of data validation, the Count of Missed Appointment Notices to be Generated text will be updated with the count of notices found to print.

8.26 Appointment Notice/Rescheduled Appointment Notice Document (Output)

This document will be generated to notify the client of an appointment that will occur or an appointment that has been rescheduled. The appointment notice may be handed to the client at the time the appointment is made if the client is present, or it may be produced at a later time and mailed to the client.

An appointment notice may be produced through five different processes:

- On demand at the time an appointment or appointments are scheduled.
- On demand for manually rescheduled appointments either individually or a mass reschedule for an entire time period
- In batch for all appointment notices queued for later production
- On demand for a selected appointment or group education class enrollment from the Appointments tab of the Participant Folder, Appointments for Today view of the Participant Folder, or the View Appointments for Date dialog.

Appointment Notice Post Card – English Version

June 21, 2005 00076355

Mary C. Participant,

You are scheduled for an Initial Certification
appointment on
Tuesday, June 18, 2005 at 2:00 PM at
Carpenter WIC Clinic
123 Fourth Avenue / Anytown

If you have any questions, please call:
Clinic WIC Program at 555-555-2987.

Thank you

Appointment Notice Post Card – Spanish Version

June 21, 2005

00076355

Mary C. Participant,

Su cita para certificación/re-certificación ha sido programada para:

Tuesday, June 18, 2005 at 2:00 PM at
Clinic WIC Clinic / 123 Fourth Avenue / Anytown

Si usted tiene alguna pregunta, por favor llame al:

{CLINIC} WIC Program at {PHONE NUMBER}.

Gracias

Appointment Notice Letter – English Version

Clinic WIC Clinic
6537 Walter Lane
Anytown, KS 66062-2371

Mary M. Participant
451 Main Street
Anytown, KS 66210-1347

00073654

June 21, 2005

Mary,

You are scheduled for an Initial Certification appointment on

Tuesday, June 18, 2005 at 2:00 PM at
Clinic WIC Clinic / 123 Fourth Avenue / Anytown

Please bring: Child and/or self, proof of ID (or WIC ID folder), proof
of income, proof of residency, proof of Medicaid, and
immunization records.

If you have any questions, please call:

Clinic WIC Program at 555-555-2987.

Thank you

Appointment Notice Letter – Spanish Version

Clinic WIC Clinic
6537 Walter Lane
Anytown, KS 66062-2371

Mary M. Participant
451 Main Street
Anytown, KS 66210-1347

00073654

June 21, 2005

Mary,

Su cita para certificación/re-certificación ha sido programada para:

Tuesday, June 18, 2005 at 2:00 PM at
Clinic WIC Clinic / 123 Fourth Avenue / Anytown

Por favor traiga: Su comprobación de ID (identificación) y/o la de su niño (o la carpeta que tiene el ID del WIC), comprobación de ingresos, comprobación de residencia, comprobación de Medicaid y los registros de vacunación, si usted tiene todo esto tráigalo a todas sus citas.

Si usted tiene alguna pregunta, por favor llame al:

{CLINIC} WIC Program at {PHONE NUMBER}.

Gracias

Rescheduled Appointment Notice Post Card – English Version

June 21, 2005

88378983

Mary C. Participant,

Your appointment for Initial Certification
has been rescheduled to

Tuesday, June 18, 2005 at 2:00 PM
Clinic WIC Clinic
123 Fourth Ave. / Anytown

If you have any questions, please call:

Clinic WIC Program at 555-555-2987.

Thank you

Rescheduled Appointment Notice Post Card – Spanish Version

June 21, 2005

88378983

Mary C. Participant,

Su cita para certificación/re-certificación ha sido reprogramada para:

Tuesday, June 18, 2005 at 2:00 PM
Clinic WIC Clinic / 123 Fourth Ave. / Anytown

Si usted tiene alguna pregunta, por favor llame al:

{Clinic} WIC Program at {PHONE NUMBER}.

Gracias

Rescheduled Appointment Notice Letter – English Version

Clinic WIC Clinic
6537 Walter Lane
Anytown, KS 66210-2371

Mary M. Participant
451 Main Street
Anytown, KS 66062-1347

00073654

June 21, 2005

Mary,

Your appointment for Initial Certification has been rescheduled to

Tuesday, June 18, 2005 at 2:00 PM
Clinic WIC Clinic / 123 Fourth Ave. / Anytown

Please bring: Child and/or self, proof of ID (or WIC ID folder), proof of income, proof of residency, proof of Medicaid, and immunization records.

If you have any questions, please call:

Clinic WIC Program at 555-555-2987.

Thank you

Rescheduled Appointment Notice Letter – Spanish Version

Clinic WIC Clinic
6537 Walter Lane
Anytown, KS 66210-2371

Mary M. Participant
451 Main Street
Anytown, KS 66062-1347

00073654

June 21, 2005

Mary,

Su cita para certificación/re-certificación ha sido reprogramada para:

Tuesday, June 18, 2005 at 2:00 PM
Clinic WIC Clinic / 123 Fourth Ave. / Anytown

Por favor traiga: Su comprobación de ID (identificación) y/o la de su niño (o la carpeta que tiene el ID del WTC), comprobación de ingresos, comprobación de residencia, comprobación de Medicaid y los registros de vacunación, si usted tiene esto tráigalo a todas sus citas.

Si usted tiene alguna pregunta, por favor llame al:

{Clinic} WIC Program at {PHONE NUMBER}.

Gracias

8.26.1 Data Elements

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

8.26.1.1 Administrative Site Name (Letter Format)

8.26.1.1.1 Origin of Data Element

The value will be taken from Agency.Name.

8.26.1.1.2 Format

The value will print as its literal value.

8.26.1.2 Administrative Site Address (Letter Format)

8.26.1.2.1 Origin of Data Element

The value will be taken from Agency.Address.

8.26.1.2.2 Format

The value will print as its literal value.

8.26.1.3 Administrative Site City (Letter Format)

8.26.1.3.1 Origin of Data Element

The value will be taken from Agency.City.

8.26.1.3.2 Format

The value will print as its literal value.

8.26.1.4 Administrative Site State (Letter Format)

8.26.1.4.1 Origin of Data Element

This value is taken from the state code defined in the system registry.

8.26.1.4.2 Format

The value will print as its literal value.

8.26.1.5 Administrative Site ZIP Code (Letter Format)

8.26.1.5.1 Origin of Data Element

The value will be taken from the Agency.Zipcode.

8.26.1.5.2 Format

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

8.26.1.6 Current Date

8.26.1.6.1 Origin of Data Element

The source of this value will be the current system date.

8.26.1.6.2 Format

The value will print in {textual month} {day}, {year} format.

8.26.1.7 Client Name

8.26.1.7.1 Origin of Data Element

The value will be taken from the Member.FirstName
Member.MiddleInitial Member.LastName,

8.26.1.7.2 Format

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

8.26.1.8 Client State WIC ID

8.26.1.8.1 Origin of Data Element

The value will be taken from the Member.StateWICID.

8.26.1.8.2 Format

The value will print as its literal value.

8.26.1.9 Client Mailing Address (Letter Format)

8.26.1.9.1 Origin of Data Element

The value will be taken from the Household.MailAddress.

8.26.1.9.2 Format

The value will print as its literal value.

8.26.1.10 Client Mailing City (Letter Format)

8.26.1.10.1 Origin of Data Element

The value will be taken from the Household.MailCity.

8.26.1.10.2 Format

The value will print as its literal value.

8.26.1.11 Client Mailing State (Letter Format)

8.26.1.11.1 Origin of Data Element

The value will be taken from the Household.MailState.

8.26.1.11.2 Format

The value will print as its literal value.

8.26.1.12 Client Mailing ZIP Code (Letter Format)

8.26.1.12.1 Origin of Data Element

The value will be taken from the Household.MailZIP.

8.26.1.12.2 Format

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

8.26.1.13 Client Name (Letter Format, salutation)

8.26.1.13.1 Origin of Data Element

The value will be taken from the Member.FirstName.

8.26.1.13.2 Format

The value will print as its literal value.

8.26.1.14 Appointment Type

8.26.1.14.1 Origin of Data Element

The value will be taken from the AppointmentType.Description.

8.26.1.14.2 Format

The value will print as its literal value.

8.26.1.15 Appointment Date

8.26.1.15.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentDate.

8.26.1.15.2 Format

The value will print in {textual name of day of week}, {textual month} {day}, {year} format.

8.26.1.16 Appointment Time

8.26.1.16.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentTime.

8.26.1.16.2 Format

The value will print in HH:MM {AM/PM} format.

8.26.1.17 Clinic Name

8.26.1.17.1 Origin of Data Element

The value will be taken from the ServiceSite.Name.

8.26.1.17.2 Format

The value will print as its literal value.

8.26.1.18 Administrative Site Address

8.26.1.18.1 Origin of Data Element

The value will be taken from the Agency.Address.

8.26.1.18.2 Format

The value will print as its literal value.

8.26.1.19 Administrative Site City

8.26.1.19.1 Origin of Data Element

The value will be taken from the Agency.City.

8.26.1.19.2 Format

The value will print as its literal value.

8.26.1.20 Information Required (Please bring)

8.26.1.20.1 Origin of Data Element

The value will be a list of items that the participant should bring to the clinic. The system will determine what information is required to complete the participant's certification and add each item to this list.

8.26.1.20.2 Format

The value will print as its literal value.

8.26.1.21 Administrative Site Telephone Number

8.26.1.21.1 Origin of Data Element

The value will be taken from the Agency.Telephone.

8.26.1.21.2 Format

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

8.26.2 Filter Criteria

8.26.2.1 Selected Appointment (On Demand)

An appointment notice document will be generated for the appointment(s) scheduled by the system or selected from the Appointments tab of the Participant Folder, Appointments for Today view of the Participant List, or from the View Appointments for Date dialog.

8.26.2.2 Appointments Occurring on a Future Date (Batch Production)

An appointment notice document will be generated for appointments with an appointment date equal to or greater than the current system date.

8.26.2.3 Appointments Queued for Later Production (Batch Production)

An appointment notice document will be generated for appointments with the Appointment-Queued-Appointment-Notice-Flag set.

8.26.3 Sort Order

8.26.3.1 Full Name

The appointment notice documents will print out in alphabetical order by last name, first name, and middle initial.

8.26.4 Control Breaks

8.26.4.1 Appointment

A page will be generated for each appointment included in the document production.

8.27 Missed Appointment Notice Document (Output)

The following documents may be generated to be mailed to the client who has missed an appointment. The appointment notice will instruct the client to call to schedule another appointment.

Missed Appointment Notice Post Card – English Version

June 21, 2005 09899989

Mary W. Participant,

You missed a WIC appointment for Initial Certification

Please call:

Clinic WIC Program at 555-555-2987

to reschedule.

Thank you

Missed Appointment Notice Post Card – Spanish Version

June 21, 2005 09899989

Mary W. Participant,

No se ha presentado a su cita de WIC. Por favor llámenos al:

Clinic WIC Program at 555-555-2987

Gracias

Missed Appointment Notice Letter – English Version

Clinic WIC Clinic
6537 Walter Lane
Anytown, KS 66210-2371

Mary M. Participant
451 Main Street
Anytown, KS 66062-1347

00073654

June 21, 2005

You missed a WIC appointment for Initial Certification.

Please call:

Clinic WIC Program at 555-555-2987

to reschedule.

Thank you

Missed Appointment Notice Letter – Spanish Version

Clinic WIC Clinic
6537 Walter Lane
Anytown, KS 66210-2371

Mary M. Participant
451 Main Street
Anytown, KS 66062-1347

00073654

June 21, 2005

No se ha presentado a su cita de WIC. Por favor llámenos al:

Clinic WIC Program at 555-555-2987

Gracias

8.27.1 Data Elements

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

8.27.1.1 Administrative Site Name (Letter Format)

8.27.1.1.1 Origin of Data Element

The value will be taken from the Agency.Name

8.27.1.1.2 Format

The value will print as its literal value.

8.27.1.2 Administrative Site Address (Letter Format)

8.27.1.2.1 Origin of Data Element

The value will be taken from the Agency.Address.

8.27.1.2.2 Format

The value will print as its literal value.

8.27.1.3 Administrative Site City (Letter Format)

8.27.1.3.1 Origin of Data Element

The value will be taken from the Agency.City.

8.27.1.3.2 Format

The value will print as its literal value.

8.27.1.4 Administrative Site State (Letter Format)

8.27.1.4.1 Origin of Data Element

This value is taken from the state code defined in the system registry.

8.27.1.4.2 Format

The value will print as the literal value.

8.27.1.5 Administrative Site ZIP Code (Letter Format)

8.27.1.5.1 Origin of Data Element

The value will be taken from the Agency.Zipcode attribute of the lookup database for the Clinic.

8.27.1.5.2 Format

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

8.27.1.6 Client State WIC ID

8.27.1.6.1 Origin of Data Element

The value will be taken from the Member.StateWICID.

8.27.1.6.2 Format

The value will print as its literal value.

8.27.1.7 Client Name

8.27.1.7.1 Origin of Data Element

The value will be taken from the, Member.FirstName, Member.MiddleInitial and Member.LastName.

8.27.1.7.2 Format

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

8.27.1.8 Client Mailing Address (Letter Format)

8.27.1.8.1 Origin of Data Element

The value will be taken from the Household.MailAddress.

8.27.1.8.2 Format

The value will print as its literal value.

8.27.1.9 Client Mailing City (Letter Format)

8.27.1.9.1 Origin of Data Element

The value will be taken from the Household.MailCity.

8.27.1.9.2 Format

The value will print as its literal value.

8.27.1.10 Client Mailing State (Letter Format)

8.27.1.10.1 Origin of Data Element

The value will be taken from the Household.MailState.

8.27.1.10.2 Format

The value will print as its literal value.

8.27.1.11 Client Mailing ZIP Code (Letter Format)

8.27.1.11.1 Origin of Data Element

The value will be taken from the Household.MailZIP.

8.27.1.11.2 Format

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

8.27.1.12 Current Date

8.27.1.12.1 Origin of Data Element

The source of this value will be the current system date.

8.27.1.12.2 Format

The value will print in {textual month} {day}, {year} format.

8.27.1.13 Administrative Site Telephone Number

8.27.1.13.1 Origin of Data Element

The value will be taken from the Agency.Telephone.

8.27.1.13.2 Format

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

8.27.2 Filter Criteria

8.27.2.1 Appointments with an Appointment Date in the Past that were Missed (Batch Production)

A missed appointment notice document will be generated for all clients whose appointments are less than the current system date and the Appointment.AppointmentKept value is not equal to 'Y'.

8.27.3 Sort Order

8.27.3.1 Full Name

The documents will be printed in alphabetical order by last name, first name, and middle initial.

8.27.4 Control Breaks

8.27.4.1 Appointment

A page will be produced for each appointment included in the document production.

8.28 Address Labels for Appointment Notice Recipients (Output)

Address labels may be produced for all clients who will receive an appointment notice for mailing purposes.

<p>Address Label for Appointment Notice Recipients</p> <p style="text-align: right;">98865754</p> <p>Mary S. Participant 6759 Pine Street Anytown, KS 66062-8373</p>

8.28.1 Data Elements

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

8.28.1.1 Client State WIC ID

8.28.1.1.1 Origin of Data Element

The value will be taken from the Member.StateWICID.

8.28.1.1.2 Format

The value will print as its literal value.

8.28.1.2 Client Name

8.28.1.2.1 Origin of Data Element

The value will be taken from the Member.FirstName
Member.MiddleInitial and Member.LastName.

8.28.1.2.2 Format

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

8.28.1.3 Client Mailing Address

8.28.1.3.1 Origin of Data Element

The value will be taken from the Household.MailAddress.

8.28.1.3.2 Format

The value will print as its literal value.

8.28.1.4 Client Mailing City

8.28.1.4.1 Origin of Data Element

The value will be taken from the Member.MailCity.

8.28.1.4.2 Format

The value will print as its literal value.

8.28.1.5 Client Mailing State

8.28.1.5.1 Origin of Data Element

The value will be taken from the Household.MailState.

8.28.1.5.2 Format

The value will print as its literal value.

8.28.1.6 Client Mailing ZIP Code

8.28.1.6.1 Origin of Data Element

The value will be taken from the Household.MailZIP.

8.28.1.6.2 Format

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

8.28.2 Filter Criteria

8.28.2.1 Selected Appointment (On Demand)

An address label will be generated for the appointment(s):

- scheduled by the system
- scheduled manually by the user

- selected by the user from the Appointments tab of the Participant Folder
- selected by the user from the Appointments for Today view of the Participant List
- selected by the user from the View Appointments for Date dialog

8.28.2.2 Household

Only one address label will be produced per household when appointment notices are generated for multiple members of the same household.

8.28.3 Sort Order

8.28.3.1 Full Name

The address labels will be printed in alphabetical order by last name, first name, and middle initial.

8.29 Address Labels for Queued Appointment Notice Recipients (Output)

Address labels may be generated for all clients who will receive an appointment notice queued for later production for mailing purposes. These address labels are generated from the Generate Queued Appointment Notices dialog.

Address Label for Queued Appointment Notice Recipients	
	98865754
Mary S. Participant 6759 Pine Street Anytown, KS 66062-8373	

8.29.1 Data Elements

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

8.29.1.1 Client State WIC ID

8.29.1.1.1 Origin of Data Element

The value will be taken from the Member.StateWICID.

8.29.1.1.2 Format

The value will print as its literal value.

8.29.1.2 Client Name

8.29.1.2.1 Origin of Data Element

The value will be taken from the Member.FirstName
Member.MiddleInitial and Member.LastName.

8.29.1.2.2 Format

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

8.29.1.3 Client Mailing Address

8.29.1.3.1 Origin of Data Element

The value will be taken from the Household.MailAddress.

8.29.1.3.2 Format

The value will print as its literal value.

8.29.1.4 Client Mailing City

8.29.1.4.1 Origin of Data Element

The value will be taken from the Household.MailCity.

8.29.1.4.2 Format

The value will print as its literal value.

8.29.1.5 Client Mailing State

8.29.1.5.1 Origin of Data Element

The value will be taken from the Household.MailState.

8.29.1.5.2 Format

The value will print as its literal value.

8.29.1.6 Client Mailing ZIP Code

8.29.1.6.1 Origin of Data Element

The value will be taken from the Household.MailZIP.

8.29.1.6.2 Format

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

8.29.2 Filter Criteria

8.29.2.1 All Appointments Queued for Later Production

The system will generate address labels for all clients whose Appointment.QueuedNoticeFlag equals 'Y'.

8.29.2.2 Household

Only one address label will be produced per household when appointment notices queued for later production are generated for multiple members of the same household.

8.29.3 Sort Order

8.29.3.1 Full Name

The address labels will be printed in alphabetical order by last name, first name, and middle initial.

8.29.4 Control Breaks

No control breaks are defined for the address labels.

8.30 Address Labels for Missed Appointment Notice Recipients (Output)

Address labels may be generated for all clients who will receive a missed appointment notice for mailing purposes.

Address Labels for Missed Appointment Notice Recipients	
	98865754
Mary S. Participant 6759 Pine Street Anytown, KS 66062-8373	

8.30.1 Data Elements

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

8.30.1.1 Client State WIC ID

8.30.1.1.1 Origin of Data Element

The value will be taken from the Member.StateWICID.

8.30.1.1.2 Format

The value will print as its literal value.

8.30.1.2 Client Name

8.30.1.2.1 Origin of Data Element

The value will be taken from the Member.FirstName
Member.MiddleInitial and Member.LastName.

8.30.1.2.2 Format

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

8.30.1.3 Client Mailing Address

8.30.1.3.1 Origin of Data Element

The value will be taken from the Household.MailAddress.

8.30.1.3.2 Format

The value will print as its literal value.

8.30.1.4 Client Mailing City

8.30.1.4.1 Origin of Data Element

The value will be taken from the Household.MailCity.

8.30.1.4.2 Format

The value will print as its literal value.

8.30.1.5 Client Mailing State

8.30.1.5.1 Origin of Data Element

The value will be taken from the Household.MailState.

8.30.1.5.2 Format

The value will print as its literal value.

8.30.1.6 Client Mailing ZIP Code

8.30.1.6.1 Origin of Data Element

The value will be taken from the Household.MailZIP.

8.30.1.6.2 Format

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

8.30.2 Filter Criteria

8.30.2.1 Appointments with an Appointment Date in the Past

The system will generate address labels for all clients whose appointments have an appointment date less than the current system date.

8.30.2.2 Missed Appointments

The system will generate address labels for all clients whose appointments do not have the Appointment-Kept-Flag attribute of the APPOINTMENT entity set.

8.30.2.3 Household

Only one address label will be produced per household when missed appointment notices are generated for multiple members of the same household.

8.30.3 Sort Order

8.30.3.1 Full Name

The address labels will be printed in alphabetical order by last name, first name, and middle initial.

8.30.4 Control Breaks

No control breaks are defined for the address labels.

8.31 Address Labels for Certification Due Recipients (Output)

Address labels may be generated for all clients who will receive a certification due notice for mailing purposes.

<p>Address Labels for Certification Due Recipients</p> <p style="text-align: right;">98865754</p> <p>Mary S. Participant 6759 Pine Street Anytown, KS 66062-8373</p>

8.31.1 Data Elements

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

8.31.1.1 Client State WIC ID

8.31.1.1.1 Origin of Data Element

The value will be taken from the Member.StateWICID.

8.31.1.1.2 Format

The value will print as its literal value.

8.31.1.2 Client Name

8.31.1.2.1 Origin of Data Element

The value will be taken from the Member.FirstName
Member.MiddleInitial and Member.LastName.

8.31.1.2.2 Format

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

8.31.1.3 Client Mailing Address

8.31.1.3.1 Origin of Data Element

The value will be taken from the Mail-Address of the HOUSEHOLD entity of the client.

8.31.1.3.2 Format

The value will print as its literal value.

8.31.1.4 Client Mailing City

8.31.1.4.1 Origin of Data Element

The value will be taken from the Mail-City of the HOUSEHOLD entity of the household member.

8.31.1.4.2 Format

The value will print as its literal value.

8.31.1.5 Client Mailing State

8.31.1.5.1 Origin of Data Element

The value will be taken from the Household.MailState.

8.31.1.5.2 Format

The value will print as its literal value.

8.31.1.6 Client Mailing ZIP Code

8.31.1.6.1 Origin of Data Element

The value will be taken from the Household.MailZIP.

8.31.1.6.2 Format

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

8.31.2 Filter Criteria

8.31.2.1 Subsequent Certification Appointments Scheduled

The system will generate an address label for each client for which a subsequent certification appointment notice was generated.

8.31.2.2 Household

Only one address label will be produced per household when subsequent certification appointment notices are generated for multiple members of the same household.

8.31.3 Sort Order

8.31.3.1 Full Name

The address labels will be generated in the last name, first name, middle initial order.

8.31.4 Control Breaks

No control breaks are defined for the address labels.

8.32 Appointments for Date Listing Report (Output) CLN017

This report allows the user to print a list of all appointments occurring on a specified date. The report is generated in response to the following user actions:

- Selection of the Print Schedule menu item on the View Appointments for Date dialog described earlier in this document
- Selection of the Print Schedule button on the View Appointments for Date dialog described earlier in this document

```

CLN017
System Name           Appointment Listing for 1/28/2005           1/27/2005
<Staff Name>                                               Page 1

Clinic:              Clinic Name

Resource:            Team 1

Time      State   Household   Client Name   WIC   Type
-----
8:00 AM  08798767  089987876  Tracy W. Client   C     Initial Cert
8:00 AM  00978876  332982776  Karen M. Applicant C     Subsequent Cert
8:20 AM  00976656  332982776  Quinton Z. Applicant B     Subsequent Cert
9:00 AM  88766252  133322766  Tonya S. Participant P     Group Education

Count of appointments for 1/28/2005:  4

<< page break >>

Total Appointments per Type

Appointment Type      Count
-----
Initial Cert.         15
Subsequent Cert.     45
Group Ed. Check Pickup 160
High Risk Check Pickup  38
  
```

8.32.1 Data Elements

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

8.32.1.1 Report Title

8.32.1.1.1 Origin of Data Element

The title of the report will be the text “Appointment Listing for” and the specified date of appointments. The appointment date will be the value selected by the user on the Monthly Calendar of the View Appointments for Date dialog described earlier in this document

8.32.1.1.2 Format

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

8.32.1.2 *Clinic Name*

8.32.1.2.1 Origin of Data Element

The value will be taken from the ServiceSite.ServiceSiteName.

8.32.1.2.2 Format

The value will print as its literal value.

8.32.1.3 *Resource Name*

8.32.1.3.1 Origin of Data Element

The value will be taken from the AppointmentResource.Name.

8.32.1.3.2 Format

The value will print as its literal value.

8.32.1.4 *Appointment Time*

8.32.1.4.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentTime.

8.32.1.4.2 Format

The value will print in HH:MM {AM/PM} format.

8.32.1.5 *State WIC ID*

8.32.1.5.1 Origin of Data Element

The value will be taken from the Member.StateWICID.

8.32.1.5.2 Format

The value will print as its literal value.

8.32.1.6 Household ID

8.32.1.6.1 Origin of Data Element

The value will be taken from the Household.HouseholdID.

8.32.1.6.2 Format

The value will print as its literal value.

8.32.1.7 Client Name

8.32.1.7.1 Origin of Data Element

The value will be taken from the Member.FirstName
Member.MiddleInitial and Member.LastName.

8.32.1.7.2 Format

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

8.32.1.8 WIC Category

8.32.1.8.1 Origin of Data Element

The value will be taken from Member.WICStatus.

8.32.1.8.2 Format

The value will print in its literal value.

8.32.1.9 Appointment Type

8.32.1.9.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentTypeID.

8.32.1.9.2 Format

The value will print as its literal value.

8.32.2 Filter Criteria

8.32.2.1 Appointments for Clinic

Only appointments for the currently selected Clinic will be included in the report.

8.32.2.2 Appointments for Specified Date

Only appointments for the date selected in the Monthly Calendar of the View Appointments for Day dialog will be included in the report.

8.32.3 Sort Order

8.32.3.1 Resource

The report will be sorted first by resource name.

8.32.3.2 Appointment Time

The report will be sorted by appointment time within resource name.

8.32.4 Control Breaks

8.32.4.1 Resource

On a change of resource name, a page break will occur.

8.32.5 Grand Total

A count of all scheduled appointments for the Clinic for the specified date will be printed by appointment type.

8.33 Upcoming High Risk Appointments

The Generate Upcoming High Risk Appointments dialog allows the user to generate a report of the upcoming appointments with clients who are classified as high risk. This dialog is invoked when the user selects the Upcoming High Risk Appointments list item from the Reports display list described in Clinic *Chapter 13 - System Outputs*.

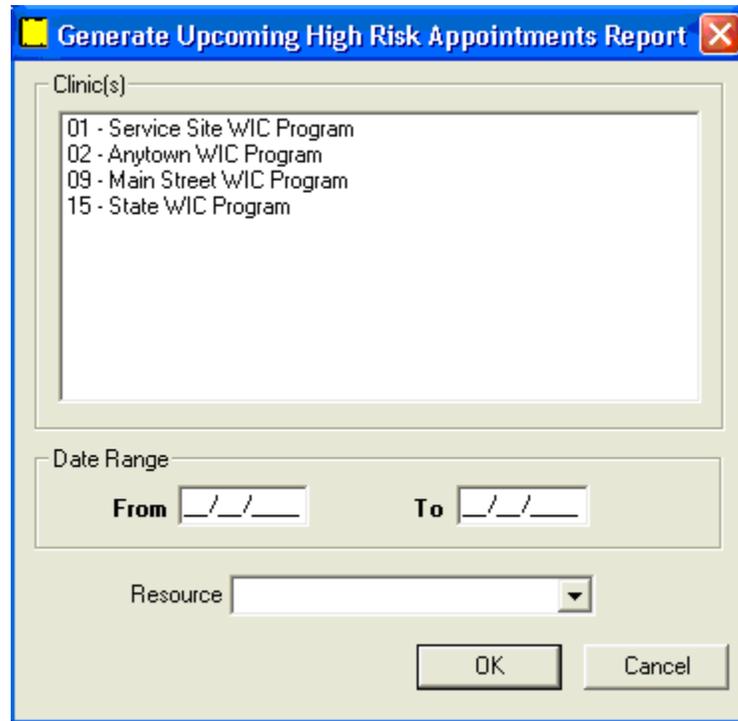


Figure 24 - Generate Upcoming High Risk Appointments Report Dialog

8.33.1 Controls

This section describes the behavior of the controls on the Generate Upcoming High Risk Appointments Report dialog.

8.33.1.1 Clinic(s) List Box

The control will be enabled when the Generate Upcoming High Risk Appointments Report dialog is active. The control allows either single or multiple selections.

8.33.1.2 Date Range From Masked Edit Box (From)

The masked edit box will be enabled when the Generate Upcoming High Risk Appointments 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.

8.33.1.3 Date Range To Masked Edit Box (To)

The masked edit box will be enabled when the Generate Upcoming High Risk Appointments 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.

8.33.1.4 Resource Dropdown

The dropdown will be enabled when the Generate Upcoming High Risk Appointments Report dialog is active. It will display the values defined for the Clinic in the AppointmentResources entity for the selected AgencyID.

8.33.1.5 OK Button

The OK button will be enabled when the Generate Upcoming High Risk Appointments Report dialog is active. Characteristics for the OK button are defined in *Consistencies*.

8.33.1.6 Cancel Button

The Cancel button will be enabled when the Generate Upcoming High Risk Appointments Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.33.2 Processes

8.33.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Generate Upcoming High Risk Appointments Report”.

The Clinic(s) list initially displays all ‘ServiceSite.ServiceSiteID – ServiceSite.ServiceSiteName’ associated with the currently selected AgencyID sorted by ServiceSite.ServiceSiteID.

No clinic is initially selected in the Clinic(s) list.

The Date Range From will initially be blank.

The Date Range To will initially be blank.

The Resource dropdown will initially be blank.

8.33.2.2 Edits

Upon selection of the OK button, if an entry is not made in the following:

- Clinic list box (at least one entry selected)
- Date Range From masked edit box
- Date Range To masked edit box

The system will invoke a standard error message with the text “An entry is required for the {control label}”.

If an invalid date is entered in a date control, the system will invoke a standard error message with the text “Invalid date entered.”

If the value of the Date Range From masked edit box is less than the current system date, the system will invoke a standard error message with the text, Date entered must be equal to or greater than today’s date.”

If the value of the Date Range To masked edit box is less than the current system date, the system will invoke a standard error message with the text, Date entered must be equal to or greater than today’s date.”

If the Date Range From masked edit box is greater than the Date Range To masked edit box, 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.”

8.33.2.3 Generate Upcoming High Risk Appointments Report

Upon successful completion of data validation, the system will generate the Upcoming High Risk Appointments report described in the next section of this document.

8.34 Upcoming High Risk Appointments Report (Output) CLN018

This report allows the user to print a report of the upcoming appointments with clients who are classified as high risk. The report is generated from the Generate Upcoming High Risk Appointments Report dialog.

```
CLN018
System Name      Upcoming High Risk Appointments      1/27/2005
<Staff Name>    1/28/2005 - 1/31/2005                12:03:00
                                                    Page   1

Local Agency:   State WIC Program
Clinic:         Main Street Clinic

Resource:       Team 1

Date:          1/27/2005

Time           State   Household
WIC ID        ID      Client Name      Telephone      Interpreter
-----
08:00AM 08798767 08998876 Tracy W. Client  555-555-5555   N
08:00AM 00978876 33298776 Karen M. Participant  555-555-9999   Y
08:20AM 00976656 33298776 Quinton Z. Participant  555-555-5999   N

Count of high risk appointments for 1/27/2005:  3

<< page break after resource >>
```

8.34.1 Data Elements

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

8.34.1.1 Report Title

8.34.1.1.1 Origin of Data Elements

The title of the report will be the text “Upcoming High Risk Appointments” and the starting and ending date of the report.

The values are taken from the Start and End dates entered on the generate panel.

8.34.1.1.2 Format

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

8.34.1.2 Agency Name

8.34.1.2.1 Origin of Data Element

The value will be taken from the Agency.Name.

8.34.1.2.2 Format

The value will print as its literal value.

8.34.1.3 Clinic Name

8.34.1.3.1 Origin of Data Element

The value will be taken from the ServiceSite.ServiceSiteName.

8.34.1.3.2 Format

The value will print as its literal value.

8.34.1.4 Resource

8.34.1.4.1 Origin of Data Element

The value will be taken from the AppointmentResource.Name.

8.34.1.4.2 Format

The value will print as its literal value.

8.34.1.5 Appointment Date

8.34.1.5.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentDate.

8.34.1.5.2 Format

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

8.34.1.6 Appointment Time

8.34.1.6.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentTime.

8.34.1.6.2 Format

The value will print in HH:MM{AM/PM} format.

8.34.1.7 State WIC ID

8.34.1.7.1 Origin of Data Element

The value will be taken from the Member.StateWICID.

8.34.1.7.2 Format

The value will print as its literal value.

8.34.1.8 Household ID

8.34.1.8.1 Origin of Data Element

The value will be taken from the Member.HouseholdID.

8.34.1.8.2 Format

The value will print as its literal value.

8.34.1.9 Client Name

8.34.1.9.1 Origin of Data Element

The value will be taken from the Member.FirstName, Member.MiddleInitial and Member.LastName.

8.34.1.9.2 Format

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

8.34.1.10 Client Telephone Number

8.34.1.10.1 Origin of Data Element

The value will be taken from the Household.Telephone1.

8.34.1.10.2 Format

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

8.34.1.11 Interpreter Needed

8.34.1.11.1 Origin of Data Element

The value will be taken from the Household.InterpreterNeeded.

8.34.1.11.2 Format

The value will print as its literal value.

8.34.2 Filter Criteria

8.34.2.1 Appointments for Specified Clinics

All appointments for the user-specified Clinics will be included in the report.

8.34.2.2 Appointments Occurring Within Specified Date Range

Only appointments with an appointment date inclusively between the starting and ending dates specified on the Generate Upcoming High Risk Appointments Report dialog will be included in the report.

8.34.2.3 Appointments for Specified Resource

If a Resource was specified on the Generate Upcoming High Risk Appointments Report dialog then only appointments scheduled for that resource will be included in the report.

8.34.2.4 Appointments for Participants Marked as High Risk

Only appointments for participants who are marked as high risk will be included in the report.

8.34.2.5 Individual Nutrition Education Contact/Check Pickup Appointments

Only appointments of the type Individual Nutrition Education/Check Pickup will be included in the report.

8.34.3 Sort Order

8.34.3.1 Resource

The report will be sorted first by the name of the resource assigned to the appointment.

8.34.3.2 Appointment Date

The report will be sorted by appointment date within resource name.

8.34.3.3 Appointment Time

The report will be sorted by appointment time within appointment date.

8.34.4 Control Breaks

8.34.4.1 Resource

On a change of resource name, a page break will occur.

8.34.4.2 Appointment Date

On a change of appointment date, a count of upcoming high risk appointments will print.

8.35 Kept vs. Missed Appointments

The Generate Kept vs. Missed Appointments Report dialog allows the user to generate a report comparing the number of appointments kept to the number of appointments missed by appointment type. It is invoked when the user selects the Appointments Kept/Missed list item from the Reports display list described in Clinic *Chapter 13 - System Outputs*.

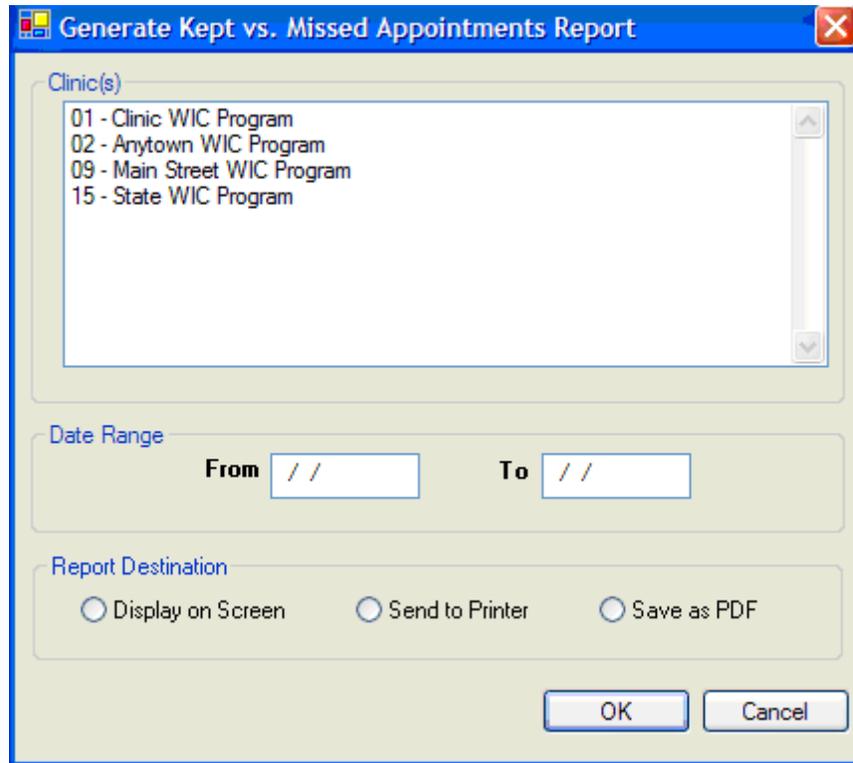


Figure 25 - Generate Kept vs. Missed Appointments Report Dialog

8.35.1 Controls

This section describes the behavior of the controls on the Generate Kept vs. Missed Appointments Report dialog.

8.35.1.1 Clinic(s) List Box

The list will be enabled when the Generate Kept vs. Missed Appointments Report dialog is active. The control allows either single or multiple selections.

8.35.1.2 Date Range From Masked Edit Box (From)

The masked edit box will be enabled when the Generate Kept vs. Missed Appointments 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.

8.35.1.3 Date Range To Masked Edit Box (To)

The masked edit box will be enabled when the Generate Kept vs. Missed Appointments 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.

8.35.1.4 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 Kept vs. Missed Appointments Report dialog is active.

8.35.1.5 OK Button

The OK button will be enabled when the Generate Kept vs. Missed Appointments Report dialog is active. Characteristics for the OK button are defined in *Consistencies*.

8.35.1.6 Cancel Button

The Cancel button will be enabled when the Generate Kept vs. Missed Appointments Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.35.2 Processes

8.35.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Generate Kept vs. Missed Appointments Report”.

The Clinic(s) list initially displays all ‘ServiceSite.ServiceSiteID – ServiceSite.ServiceSiteName’ associated with the currently selected AgencyID sorted by ServiceSite.ServiceSiteID.

No clinic is initially selected in the Clinic(s) list.

The Date Range From will initially be blank

The Date Range To will initially be blank

8.35.2.2 Edits

Upon selection of the OK button, if an entry is not made in the following:

- Clinic list box (at least one entry selected)
- Date Range From masked edit box
- Date Range To masked edit box

The system will invoke a standard error message with the text “An entry is required for the {control label}”.

If an invalid date is entered in a date control, the system will invoke a standard error message with the text “Invalid date entered.”

If the value of the Date Range From masked edit box is greater than the current system date, the system will invoke a standard error message with the text, “Date entered must be equal to or less than today’s date.”

If the value of the Date Range To masked edit box is greater than the current system date, the system will invoke a standard error message with the text, “Date entered must be equal to or less than today’s date.”

If the Date Range From masked edit box is greater than the Date Range To masked edit box, 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.”

8.35.2.3 Generate Kept vs. Missed Appointments Report

Upon successful completion of data validation, the system will generate the Kept vs. Missed Appointments 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.

8.36 Kept vs. Missed Appointments Summary Report (Output) CLN019

This report allows the user to view the number of appointments kept versus missed per appointment type. This information is useful in determining the number of appointments to define for the search function of appointment scheduling. The report is generated from the Generate Kept vs. Missed Appointments Summary Report dialog.

CLN019							
System Name	Kept vs. Missed Appointments			1/27/2005			
<Staff Name>	1/27/2005 - 1/28/2005			Page 1			
Clinic:	Main Street Clinic						
				-----Confirmed-----			
Appointment Type	Kept	Missed	Kept %	Kept	Missed	Kept %	
-----	-----	-----	-----	-----	-----	-----	-----
Initial Certification	126	13	90.64	126	13	90.64	
Group Education	100	5	95.23	100	5	95.23	
Individual Education	56	26	68.29	56	26	68.29	
Subsequent Certification	57	3	95.00	57	3	95.00	
-----	-----	-----	-----	-----	-----	-----	-----
Clinic Totals	339	47	87.82	339	47	87.82	
<< Page Break >>							
Grand Totals for Agency							
				-----Confirmed-----			
Appointment Type	Kept	Missed	Kept %	Kept	Missed	Kept %	
-----	-----	-----	-----	-----	-----	-----	-----
Initial Certification	987	113	89.72	987	113	89.72	
Group Education	255	45	85.00	255	45	85.00	
Individual Education	587	126	82.32	587	126	82.32	
Subsequent Certification	452	93	82.93	452	93	82.93	
-----	-----	-----	-----	-----	-----	-----	-----
Grand Totals	2281	377	85.81	2281	377	85.81	

8.36.1 Data Elements

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

8.36.1.1 Report Title

8.36.1.1.1 Origin of Data Elements

The title of the report will be the text “Kept vs. Missed Appointments Summary” and the starting and ending date of the report. The starting and ending dates of the report will be entered on the Generate Kept vs. Missed Appointments Summary Report dialog by the user.

8.36.1.1.2 Format

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

8.36.1.2 *Clinic Number*

8.36.1.2.1 Origin of Data Element

The value will be taken from the Appointment.ServiceSiteID.

8.36.1.2.2 Format

The value will print as its literal value.

8.36.1.3 *Clinic Name*

8.36.1.3.1 Origin of Data Element

The value will be taken from the ServiceSite.ServiceSiteName.

8.36.1.3.2 Format

The value will print as its literal value.

8.36.1.4 *Appointment Type Text*

8.36.1.4.1 Origin of Data Element

The value will be taken from the AppointmentType.Description.

8.36.1.4.2 Format

The value will print as its literal value.

8.36.1.5 *Count of Kept Appointments*

8.36.1.5.1 Origin of Data Element

The value will be the accumulated total of appointments of the specified type for the specified Clinic where the Appointment.AppointmentKept value equals 'Y'.

8.36.1.5.2 Format

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

8.36.1.6 Count of Missed Appointments

8.36.1.6.1 Origin of Data Element

The value will be the accumulated total of appointments of the specified type for the specified Clinic where the Appointment.AppointmentKept value is not equal to 'Y'.

8.36.1.6.2 Format

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

8.36.1.7 Kept verses Total Percentage

8.36.1.7.1 Origin of Data Element

The value will be the count of kept appointments divided by the total number of appointments times 100.

8.36.1.7.2 Format

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

8.36.1.8 Count of Confirmed and Kept Appointments

8.36.1.8.1 Origin of Data Element

The value will be the accumulated total of appointments of the specified type for the specified Clinic where the Appointment.AppointmentKept value equals 'Y' and the Appointment.AppointmentConfirmed value equals 'Y'.

8.36.1.8.2 Format

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

8.36.1.9 Count of Confirmed and Missed Appointments

8.36.1.9.1 Origin of Data Element

The value will be the accumulated total of appointments of the specified type for the specified Clinic where the Appointment.AppointmentKept value is not equal to 'Y' and the Appointment.AppointmentConfirmed value equals 'Y'.

8.36.1.9.2 Format

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

8.36.1.10 Kept verses Total Percentage

8.36.1.10.1 Origin of Data Element

The value will be the count of confirmed and kept appointments divided by the total number of confirmed appointments times 100.

8.36.1.10.2 Format

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

8.36.2 Filter Criteria

8.36.2.1 Appointments for Specified Clinics

All appointments for user-specified Clinics will be included in the report.

8.36.2.2 Appointments within Specified Date Range

All appointments with an appointment date occurring between the user-specified begin and end date will be included in the report.

8.36.3 Sort Order

8.36.3.1 Clinic Number

The report will be sorted first by Clinic number.

8.36.3.2 Appointment Type

The report will be sorted by appointment type within Clinic number.

8.36.4 Control Breaks

8.36.4.1 Clinic Number

At a change in Clinic number, subtotal will print for:

- Counts of kept appointments
- Counts of missed appointments
- Percentage of kept versus total appointments
- Counts of confirmed and kept appointments
- Counts of confirmed and missed appointments
- Percentage of confirmed and kept versus total confirmed appointments

A page break will occur at the change of a Clinic.

8.36.5 Grand Total

A grand total will print for the Agency for the following:

- Counts of kept appointments for each appointment type
- Counts of missed appointments for each appointment type
- Percentage of kept versus total appointments for each appointment type
- Counts of confirmed and kept appointments for each appointment type
- Counts of confirmed and missed appointments for each appointment type
- Percentage of confirmed and kept versus total confirmed appointments for each appointment type
- Counts of kept appointments for all selected Clinics
- Counts of missed appointments for all selected Clinics
- Percentage of kept versus total appointments for all selected Clinics
- Counts of confirmed and kept appointments for all selected Clinics
- Counts of confirmed and missed appointments for all selected Clinics
- Percentage of confirmed and kept versus total confirmed appointments for all selected Clinics

8.37 Upcoming Appointments

The Generate Upcoming Appointments Report dialog allows the user to generate a report of the upcoming appointments during a specified date range. This dialog is invoked when the user selects the Upcoming Appointments list item from the Reports display list described in Clinic *Chapter 13 - System Outputs*.

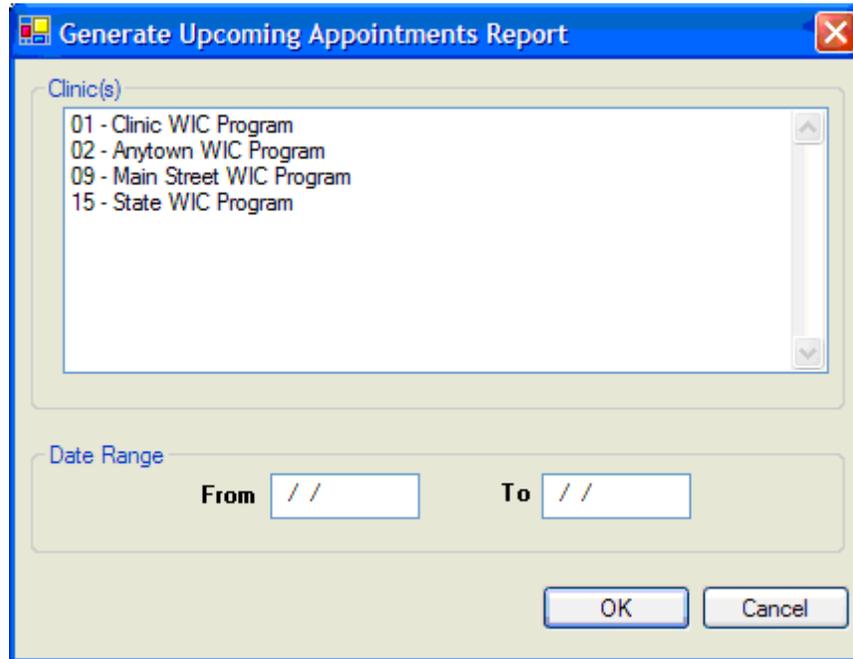


Figure 26 - Generate Upcoming Appointments Report Dialog

8.37.1 Controls

8.37.1.1 Clinic(s) List Box

The list box will be enabled when the Generate Upcoming Appointments Report dialog is active. The control allows either single or multiple selections.

8.37.1.2 Date Range From Masked Edit Box (From)

The masked edit box will be enabled when the Generate Upcoming Appointments 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.

8.37.1.3 Date Range To Masked Edit Box (To)

The masked edit box will be enabled when the Generate Upcoming Appointments 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.

8.37.1.4 OK Button

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

8.37.1.5 Cancel Button

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

8.37.2 Processes

8.37.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Generate Upcoming Appointments Report”.

The Clinic(s) list initially displays all ‘ServiceSite.ServiceSiteID – ServiceSite.ServiceSiteName’ associated with the currently selected AgencyID sorted by ServiceSite.ServiceSiteID.

No clinic is initially selected in the Clinic(s) list.

The Date Range From will initially be blank

The Date Range To will initially be blank

8.37.2.2 Edits

Upon selection of the OK button, if an entry is not made in the following:

- Clinic list box (at least one entry selected)
- Date Range From masked edit box
- Date Range To masked edit box

The system will invoke a standard error message with the text “An entry is required for the {control label}”.

If an invalid date is entered in a date control, the system will invoke a standard error message with the text “Invalid date entered.”

If the value of the Date Range From masked edit box is less than the current system date, the system will invoke a standard error message with the text, "Date entered must be equal to or greater than today's date."

If the value of the Date Range To masked edit box is less than the current system date, the system will invoke a standard error message with the text, "Date entered must be equal to or greater than today's date."

If the Date Range From masked edit box is greater than the Date Range To masked edit box, 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."

8.37.2.3 Generate Upcoming Appointments List Report

Upon successful completion of data validation, the system will generate the Upcoming Appointments List report described in the next section of this document.

8.38 Upcoming Appointments List Report (Output) CLN020

This report allows the user to print a report of the upcoming appointments during a specified date range. The report is generated from the Generate Upcoming Appointments Report dialog.

```

CLN020
System Name          Upcoming Appointments List          04/08/2005
<Staff Name>        03/25/2005 - 03/26/2005          12:30:00
                                                              Page    1

Local Agency: State WIC Program
Clinic:             Main Street Clinic
Resource:           Clinic Staff

Time      State   Household  Client Name          Telephone  Interpreter  ADA
-----   ----   -
8:00 AM  08798767 09987876  Tracy W. Client      555-955-5555  N/A          N/A
                    Initial Certification

8:00 AM  00978876 33298776  Karen M. Participant 555-555-9999  Spanish     N/A
                    Group Education

8:20 AM  00976656 33298776  Quinton Z. Participant 555-555-5999  N/A         Blind
                    Subsequent Certification

Count of appointments for 3/25/2005:  3

<< page break after resource >>

```

8.38.1 Data Elements

8.38.1.1 Report Title

8.38.1.1.1 Origin of Data Elements

The title of the report will be the text “Upcoming Appointments List” and the starting and ending date of the report. The starting and ending dates of the report will be entered on the Generate Upcoming Appointments Report dialog by the user.

8.38.1.1.2 Format

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

8.38.1.2 Agency Name

8.38.1.2.1 Origin of Data Element

The value will be taken from the Agency.Name.

8.38.1.2.2 Format

The value will print as its literal value.

8.38.1.3 Clinic Name

8.38.1.3.1 Origin of Data Element

The value will be taken from the ServiceSite.ServiceSiteName.

8.38.1.3.2 Format

The value will print as its literal value.

8.38.1.4 Resource

8.38.1.4.1 Origin of Data Element

The value will be taken from the AppointmentResource.Name.

8.38.1.4.2 Format

The value will display as its literal value.

8.38.1.5 Appointment Time

8.38.1.5.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentTime.

8.38.1.5.2 Format

The value will print in HH:MM {AM/PM} format.

8.38.1.6 Client State WIC ID

8.38.1.6.1 Origin of Data Element

The value will be taken from the Member.StateWICID.

8.38.1.6.2 Format

The value will print as its literal value.

8.38.1.7 Household ID

8.38.1.7.1 Origin of Data Element

The value will be taken from the Member.HouseholdID.

8.38.1.7.2 Format

The value will print as its literal value.

8.38.1.8 Client Name

8.38.1.8.1 Origin of Data Element

The value will be taken from the Member.FirstName
Member.MiddleInitial and Member.LastName.

8.38.1.8.2 Format

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

8.38.1.9 Client Telephone Number

8.38.1.9.1 Origin of Data Element

The value will be taken from the Household.Telephone1.

8.38.1.9.2 Format

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

8.38.1.10 Interpreter Needed

8.38.1.10.1 Origin of Data Element

The value will be taken from the Household.InterpreterNeeded.

8.38.1.10.2 Format

The value will print as its textual value.

8.38.1.11 ADA Accessibility

8.38.1.11.1 Origin of Data Element

The value will be taken from the Member.Disability.

8.38.1.11.2 Format

The value will print as its textual value.

8.38.1.12 Appointment Type

This value will be the appointment type of the appointment.

8.38.1.12.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentType.

8.38.1.12.2 Format

The value will print as its literal value.

8.38.2 Filter Criteria

8.38.2.1 Appointments Occurring Within Specified Date Range

Only appointments with an appointment date inclusively between the starting and ending dates specified on the Generate Upcoming Appointments Report dialog will be included in the report.

8.38.2.2 Appointments for Specified Clinics

Only appointments scheduled at the Clinics specified on the Generate Upcoming Appointments Report dialog will be included in the report.

8.38.3 Sort Order

8.38.3.1 Clinic

The report will be sorted first by clinic.

8.38.3.2 Resource

The report will be sorted by resource name within clinic.

8.38.3.3 Appointment Date

The report will be sorted by appointment date within resource name.

8.38.3.4 Appointment Time

The report will be sorted by appointment time within appointment date.

8.38.4 Control Breaks

8.38.4.1 Resource

On a change of a resource name, a page break will occur.

8.38.4.2 Appointment Date

On a change of appointment date, a page break will occur and a count of appointments will print.

8.38.5 Grand Total

A grand total of appointments included in the report will print.

8.39 Generate No Show Report

The Generate No Show Report dialog allows the user to generate a report of the number of appointments for which participant did not show. It is invoked when the user selects the No Show Report list item from the Reports display list.

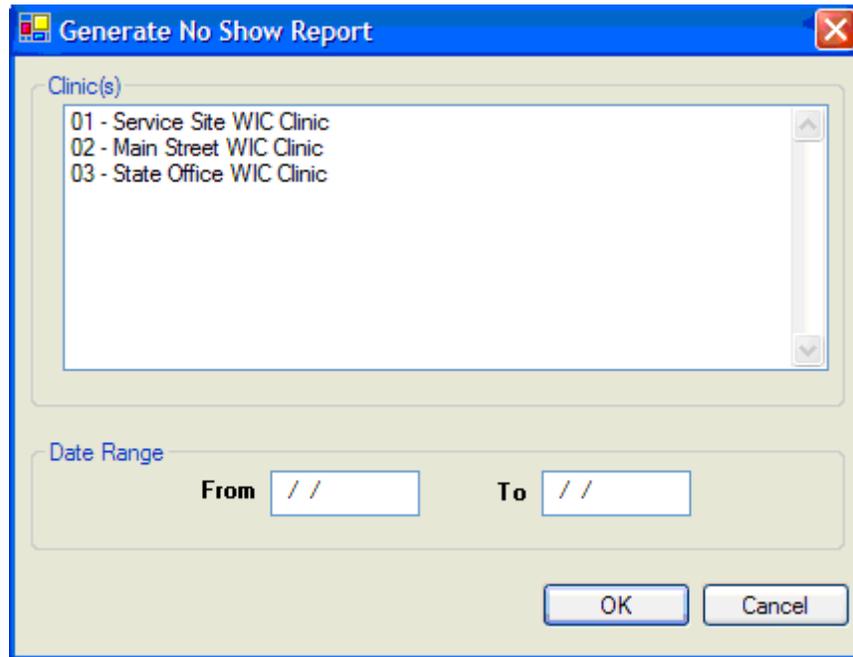


Figure 27 - Generate No Show Report Dialog

8.39.1 Controls

8.39.1.1 Clinic(s) list box

The list box will be enabled when the Generate No Show Report dialog is active. The control allows either single or multiple selections.

8.39.1.2 Date Range From Masked Edit Box (From)

The masked edit box will be enabled when the Generate No Show 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.

8.39.1.3 Date Range To Masked Edit Box (To)

The masked edit box will be enabled when the Generate No Show 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.

8.39.1.4 OK Button

The OK button will be enabled when the Generate No Show Report dialog is active. Characteristics for the OK button are defined in *Consistencies*.

8.39.1.5 Cancel Button

The Cancel button will be enabled when the Generate No Show Report dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

8.39.2 Processes

8.39.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Generate No Show Report”.

The Clinic(s) list initially displays all ‘ServiceSite.ServiceSiteID – ServiceSite.ServiceSiteName’ associated with the currently selected AgencyID sorted by ServiceSite.ServiceSiteID.

No clinic is initially selected in the Clinic(s) list.

The Date Range From will initially be blank

The Date Range To will initially be blank

8.39.2.2 Edits

Upon selection of the OK button, if an entry is not made in the following:

- Clinic list box (at least one entry selected)
- Date Range From masked edit box
- Date Range To masked edit box

The system will invoke a standard error message with the text “An entry is required for the {control label}”.

If an invalid date is entered in a date control, the system will invoke a standard error message with the text “Invalid date entered.”

If the value of the Date Range From masked edit box is greater than the current system date, the system will invoke a standard error message with the text, “Date entered must be equal to or less than today’s date.”

If the value of the Date Range To masked edit box is greater than the current system date, the system will invoke a standard error message with the text, “Date entered must be equal to or less than today’s date.”

If the Date Range From masked edit box is greater than the Date Range To masked edit box, 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.”

8.39.2.3 Generate No Show Report

Upon successful completion of data validation, the system will generate the No Show Report described in the next section of this document.

8.40 No Show Report (Output) CLN021

This report allows the user to print a list of the no show rate for the selected Clinics. The report will list the Clinic information for each day for the month for the number of months desired starting with the selected month.

CLN021				
<State DOH>		No Show Rate		07/11/2005
<Staff Name>		06/01/2005 - 06/30/2005		03:50 PM
				Page 1
Local Agency:	01 - Neighborhood Health Clinics, Inc.			
Clinic:	03 - Monroeville WIC Clinic			
Hour	Appointments	Kept	Missed	Missed %
----	-----	----	-----	-----
8AM	10	8	2	20
9AM	20	16	4	20
Totals:	30	24	6	20
<< Page Break >>				
Grand Totals for Selected Clinics				
Hour	Appointments	Kept	Missed	Missed %
----	-----	----	-----	-----
8AM	110	102	8	7
9AM	29	20	9	31
Totals:	139	122	17	12

8.40.1 Report Title

The title of the report will be the text of “No Show Rate” and the starting and ending date of the report. The starting and ending dates of the report will be entered on the Generate No Show Report dialog by the user.

8.40.2 Data Elements

8.40.2.1 Local Agency

8.40.2.1.1 Origin of Data Element

The values will be taken from the Agency.AgencyID - Agency.Name.

8.40.2.1.2 Format

The values will print as their literal value.

8.40.2.2 Clinic Number

8.40.2.2.1 Origin of Data Element

The value will be taken from the Appointment.ServiceSiteID.

8.40.2.2.2 Format

The value will print as its literal value.

8.40.2.3 Clinic Name

8.40.2.3.1 Origin of Data Element

The value will be taken from the ServiceSite.ServiceSiteName.

8.40.2.3.2 Format

The value will print as its literal value.

8.40.2.4 Hour

8.40.2.4.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentTime. If there is an appointment scheduled for the hour, the hour will print. For example, there are two appointments, one at 8:15 AM and another at 8:50 AM. Because of these appointments, the line for 8 AM will appear.

8.40.2.4.2 Format

The value will print as its literal value.

8.40.2.5 *Appointments*

8.40.2.5.1 Origin of Data Element

The value will be taken from the Appointment.AppointmentTime. If there is an appointment scheduled for the hour, the hour will print. For example, there are two appointments, one at 8:15 AM and another at 8:50 AM. Because of this the Appointments count, for 8 AM, would be 2.

8.40.2.5.2 Format

The value will print as its literal value.

8.40.2.6 *Kept*

8.40.2.6.1 Origin of Data Element

The value will be the count from the Appointment.AppointmentKept where the value = 'Y' for that hour.

8.40.2.6.2 Format

The value will print as the calculated value.

8.40.2.7 *Missed*

8.40.2.7.1 Origin of Data Element

The value will be the count from the Appointment.AppointmentKept where the value does not equal 'Y' for that hour.

8.40.2.7.2 Format

The value will print as the calculated value.

8.40.2.8 *Missed %*

8.40.2.8.1 Origin of Data Element

The value will be calculated from the Appointment.AppointmentKept. This is the percentage of the appointments that were missed.

8.40.2.8.2 Format

The value will print as the calculated value.

8.40.3 Filter Criteria

8.40.3.1 Appointments for Specified Clinics

All appointments for user-specified Clinics will be included in the report.

8.40.3.2 Appointments within Specified Date Range

All appointments with an appointment date occurring between the user-specified begin and end date will be included in the report.

8.40.4 Sort Order

8.40.4.1 Clinic Number

The report will be sorted first by Clinic number.

8.40.4.2 Days of the Month

The report will be sorted by the day of the month that the appointments are scheduled.

8.40.4.3 Hours of the Day

The report will be sorted by the hours in the day that the appointments are scheduled.

8.40.5 Control Breaks

8.40.5.1 Days of the Month

At a change in the day of the month

- counts of appointments
- counts of missed appointments
- percentage of missed versus total appointments

A page break will occur at the change of a day of the month.

8.40.5.2 Clinic Number

At a change in Clinic number, subtotals will print for:

- counts of appointments
- counts of missed appointments

- percentage of missed versus total appointments

A page break will occur at the change of a Clinic.

8.40.6 Grand Total

A grand total will print for:

- counts of appointments
- counts of missed appointments
- percentage of missed versus total appointments

8.41 Generate Group Class Roster

The Generate Group Class Roster dialog allows the user to generate a report listing the participants who are enrolled in a specific group education class. This dialog is invoked when the user selects the Group Class Roster list item from the Reports display list.

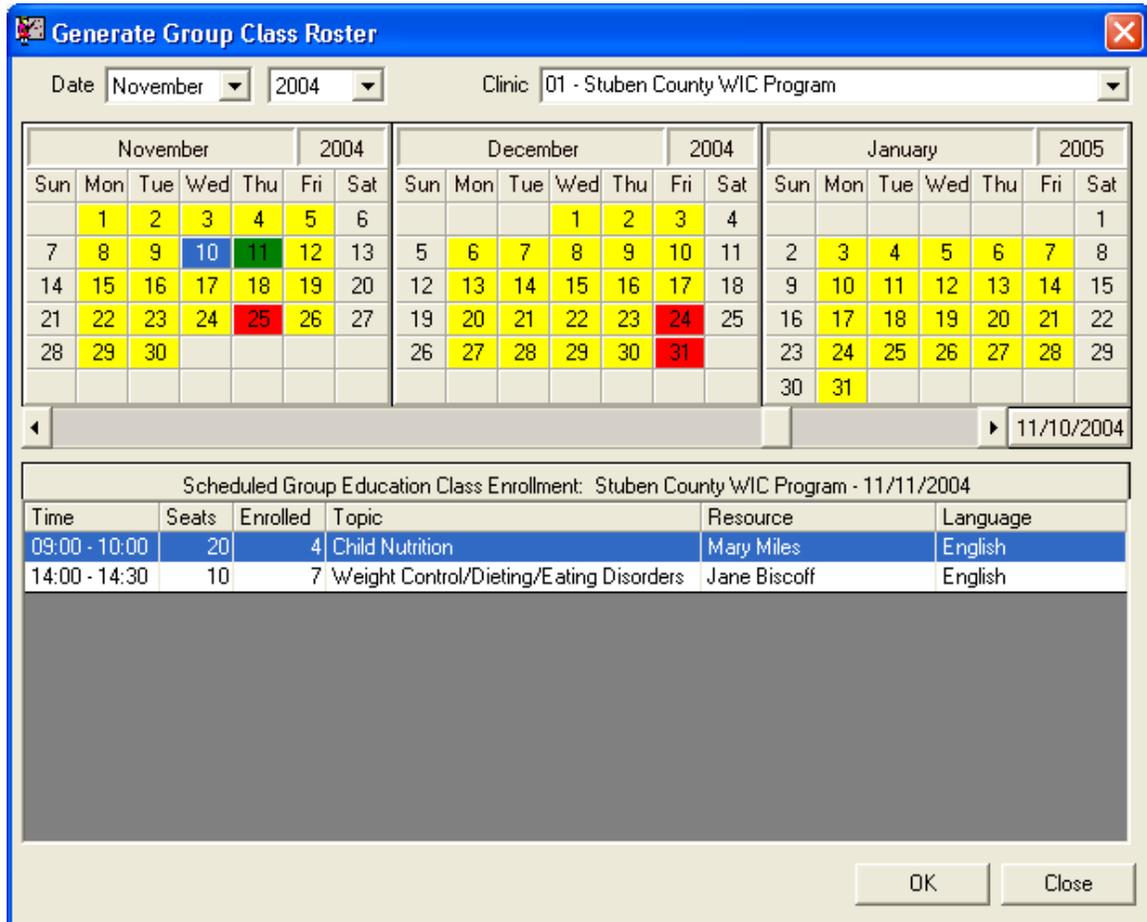


Figure 28 - Generate Group Class Roster Dialog

8.41.1 Controls

8.41.1.1 Month Dropdown

The dropdown will be enabled when the Generate Group Class Roster dialog is active. It will display each month of the year in month order. Upon a change in the month selected, the information in the Scheduled Group Education Class monthly calendar and Scheduled Group Education Classes display grid will be refreshed.

8.41.1.2 Year Dropdown

The dropdown will be enabled when the Generate Group Class Roster dialog is active. It will contain an entry for the current year plus 1 year. Upon a change in the year selected, the information in the Scheduled Group Education Class monthly calendar and Scheduled Group Education Classes display grid will be refreshed.

8.41.1.3 Clinic Dropdown

The dropdown will be enabled when the Generate Group Class Roster dialog is active. It will contain an entry for each Clinic that belongs to the local agency. It will contain an entry for each Clinic in the ServiceSite entity associated with the selected Agency. It will display as 'ServiceSiteID-ServiceSiteName'. Upon a change in the Clinic selected, the information in the Scheduled Group Education Class monthly calendar and Scheduled Group Education Classes display grid will be refreshed.

8.41.1.4 Scheduled Group Education Class Monthly Calendar

The monthly calendar will be enabled when the Generate Group Class Roster dialog is active. The user can select a day from the monthly calendar to display the scheduled group education classes. The caption will display the date for the selected day. The minimum date allowed is the current system date and the maximum date allowed is the last day of the current month plus one year. The calendar is color-coded to indicate the schedule availability as follows:

- Holidays: Red
- Business days: Yellow
- Selected date: Blue
- Non-business days or days not defined: Gray
- Current system date: Green

Upon a change in the date selected on the calendar, the values in the Scheduled Group Education Classes display grid will be refreshed.

8.41.1.5 Scheduled Group Education Classes Display Grid

The display grid will be enabled when the Generate Group Class Roster dialog is active. The grid header will display the read-only text "Scheduled Group Education Class Enrollment:" with the clinic selected in the Clinic dropdown and the date selected in the Scheduled Group Education Class monthly calendar. It consists of the following columns and values:

- Time
- Seats
- Enrolled

- Topic
- Resource
- Language

The grid will display the values from the ClassSchedule and ClassType entities for the date selected in the Scheduled Group Education Class monthly calendar. The entries in the grid will be sorted in chronological order by the Time column. The values on the grid are read-only.

8.41.1.6 OK Button

The OK button will be enabled when the Generate Group Class Roster dialog is active and a group class has been scheduled for the business day. Characteristics for the OK button are defined in *Consistencies*.

8.41.1.7 Close Button

The Close button will be enabled when the Generate Group Class Roster dialog is active. Characteristics for the Close button are defined in *Consistencies*.

8.41.2 Processes

8.41.2.1 Initializing the Interface

Upon initial presentation of the Generate Group Class Roster dialog the following values are displayed:

- Upon initial display, set the title bar text to “Generate Group Class Roster”.
- The Month dropdown will initially display the current month.
- The Year dropdown will initially display the current year.
- The Clinic dropdown will initially display the Clinic selected by the user on the login screen.
- The Scheduled Group Education Class Monthly Calendar will display the calendar for the current month and year plus the next two months.
- The Scheduled Group Education Class Monthly Calendar will initially select the current system day.
- The Scheduled Group Education Class Monthly Calendar will color-code the calendar days as defined in the Controls section of this dialog for that control.
- The Scheduled Group Education Classes display grid initially displays the scheduled group classes for the current system date.

8.41.2.2 Edits

Upon selection of the OK button, if a selection is not made in the Scheduled Group Education Classes display grid, the system will invoke a standard error message with the text “Please select a class from the grid.”

8.41.2.3 Generate Group Class Roster

Upon successful completion of data validation, the system will generate the Group Class Roster described in the next section of this document.

8.42 Group Class Roster (Output) CLN022

This report allows the user to print a list of all participants who are enrolled in a group education class. The report is generated from the Generate Group Class Roster dialog.

CLN022					
System Name		Group Class Roster			11/10/2005
<Staff Name>					Page 1
Local Agency:	State WIC Program				
Clinic:	Stuben County WIC Program				
Date:	11/11/2005				
Time:	09:00AM - 10:00AM				
Topic:	Child Nutrition				
Resource:	Mary Miles				
Language:	English				
	State	Household	WIC		
Client Name	WIC ID	ID	Category	Telephone	
-----	-----	-----	-----	-----	-----
Karen M. Applicant	00978876	332982776	C	555-955-1134	
Quinton Z. Applicant	00976656	332982776	B	555-955-1134	
Tracy W. Client	08798767	089987876	C	555-955-5555	
Tonya S. Participant	88766252	133322766	P	555-955-8775	
Count of enrollees for class:	4				

8.42.1 Data Elements

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

8.42.1.1 Report Title

8.42.1.1.1 Origin of Data Element

The title of the report will be the text "Group Class Roster".

8.42.1.1.2 Format

The value will print as its literal value.

8.42.1.2 Local Agency Name

8.42.1.2.1 Origin of Data Element

The value will be taken from the Agency.Name.

8.42.1.2.2 Format

The value will print as its literal value.

8.42.1.3 Clinic Name

8.42.1.3.1 Origin of Data Element

The value will be taken from the ServiceSite.ServiceSiteName.

8.42.1.3.2 Format

The value will print as its literal value.

8.42.1.4 Date

8.42.1.4.1 Origin of Data Element

The value will be taken from the ClassSchedule.ClassDate.

8.42.1.4.2 Format

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

8.42.1.5 Time

8.42.1.5.1 Origin of Data Element

The value will be taken from the ClassSchedule.ClassTime and ClassSchedule.Duration.

8.42.1.5.2 Format

The value will print in HH:MM {AM/PM} - HH:MM {AM/PM} format.

8.42.1.6 Topic

8.42.1.6.1 Origin of Data Element

The value will be taken from the ClassType.Topic.

8.42.1.6.2 Format

The value will print as its literal value.

8.42.1.7 Resource Name

8.42.1.7.1 Origin of Data Element

The value will be taken from the
ClassSchedule.AppointmentResourceID.

8.42.1.7.2 Format

The value will print as its literal value.

8.42.1.8 Language

8.42.1.8.1 Origin of Data Element

The value will be taken from the ClassSchedule.Language.

8.42.1.8.2 Format

The value will print as its literal value.

8.42.1.9 Client Name

8.42.1.9.1 Origin of Data Element

The value will be taken from the Member.FirstName
Member.MiddleInitial and Member.LastName.

8.42.1.9.2 Format

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

8.42.1.10 State WIC ID

8.42.1.10.1 Origin of Data Element

The value will be taken from the Member.StateWICID.

8.42.1.10.2 Format

The value will print as its literal value.

8.42.1.11 Household ID

8.42.1.11.1 Origin of Data Element

The value will be taken from the Household.HouseholdID.

8.42.1.11.2 Format

The value will print as its literal value.

8.42.1.12 WIC Category

8.42.1.12.1 Origin of Data Element

The value will be taken from Member.WICStatus.

8.42.1.12.2 Format

The value will print in its literal value.

8.42.1.13 Client Telephone Number

8.42.1.13.1 Origin of Data Element

The value will be taken from the Household.Telephone1.

8.42.1.13.2 Format

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

8.42.2 Filter Criteria

8.42.2.1 Enrollees for Group Education Class

Only participants who are scheduled to attend the selected group education class will be included in the report.

8.42.3 Sort Order

8.42.3.1 Client Name

The report will be sorted by client name.

8.42.4 Control Breaks

No control breaks are defined for this report.

8.42.5 Grand Total

A count of all participants scheduled to attend the selected group education class will be printed.

8.43 Generate Class Attendance Report

The Generate Class Attendance Report dialog allows the user to generate a list of scheduled classes and the participants who attended each class. It is invoked when the user selects the Class Attendance list item from the Reports display list.

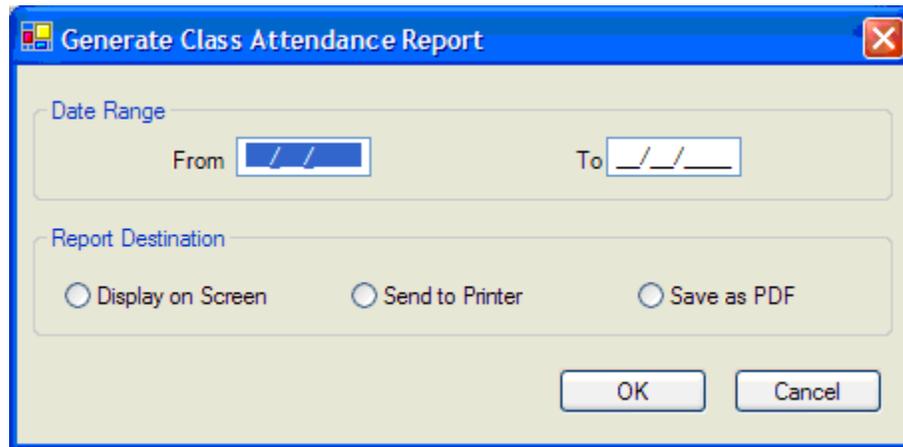


Figure 29 - Generate Class Attendance Report Dialog

8.43.1 Controls

8.43.1.1 Date Range From Masked Edit Box (From)

The masked edit box will be enabled when the Generate Class Attendance 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.

8.43.1.2 Date Range To Masked Edit Box (To)

The masked edit box will be enabled when the Generate Class Attendance 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.

8.43.1.3 Report Destination Radio Button Group

This group of radio buttons allows the user to select the destination of the report. The radio button group will be enabled when the Generate Class Attendance Report dialog is active. There will be three (3) report destinations:

- Display on Screen

- Send to Printer
- Save as PDF

The Display on Screen radio button will be the default selection.

8.43.1.4 OK Button

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

8.43.1.5 Cancel Button

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

8.43.2 Processes

8.43.2.1 Initializing the Interface

Upon initial display, set the title bar text to “Generate Class Attendance Report”.

The Date Range From will initially be blank.

The Date Range To will initially be blank.

The Display on Screen radio button will initially be selected.

8.43.2.2 Edits

Upon selection of the OK button, the system will invoke a standard error message with the text “An entry is required for the {control label}” if an entry is not made in the following:

- Date Range From masked edit box
- Date Range To masked edit box

If an invalid date is entered in a date control, the system will invoke a standard error message with the text “Invalid date entered.”

If the value of the Date Range From masked edit box is greater than the current system date, the system will invoke a standard error message with the text “Date entered must be equal to or less than today’s date.”

If the value of the Date Range To masked edit box is greater than the current system date, the system will invoke a standard error message with the text “Date entered must be equal to or less than today’s date.”

If the Date Range From masked edit box is greater than the Date Range To masked edit box, 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.”

8.43.2.3 Generate Class Attendance Report

Upon successful completion of data validation, the system will generate the Class Attendance Report described in the next section of this document.

8.44 Class Attendance Report (Output) CLN023

CLN023		
System Name	Class Attendance Report	11/10/2005
<Staff Name>	02/01/2005 - 02/28/2005	Page 1
Agency: 001 - Smithville WIC Program		
Clinic: 001 - Smithville WIC Clinic		
Date: 02/01/2005		
Time: 10:00 am		
Topic: Breastfeeding Methods		
Staff Member: Janet Smith		
State WIC ID	Participant Name	Attended
01223234	Jones, Margarette H.	Y
01234399	Brownstone, Mardene F.	Y
01459873	Freshart, Julie N.	N
01556200	Gibbons, Wendy O.	Y
01897211	Ardens, Jenny Q.	Y
01899990	Sundinger, Genuile G.	Y
01293213	Henries, Harriette H.	Y
02754458	Allesse, Rene W.	Y
03459459	Druert, Kelly D.	N
03772812	Xavier, Helen S.	Y
Attendance Percentage: 80%		

This report allows the user to print a list of scheduled classes and the participants who attended each class.

8.44.1 Report Title

The title of the report will be the text of "Class Attendance". A subtitle will indicate the date range selected for the report.

8.44.2 Data Elements

8.44.2.1 *Local Agency*

8.44.2.1.1 Origin of Data Element

The values will be taken from the Agency.AgencyID - Agency.Name.

8.44.2.1.2 Format

The values will print as their literal value.

8.44.2.2 *Clinic Number*

8.44.2.2.1 Origin of Data Element

The value will be taken from the ClassEnrollment.ServiceSiteID.

8.44.2.2.2 Format

The value will print as its literal value.

8.44.2.3 *Clinic Name*

8.44.2.3.1 Origin of Data Element

The value will be taken from the ServiceSite.ServiceSiteName.

8.44.2.3.2 Format

The value will print as its literal value.

8.44.2.4 *Date*

8.44.2.4.1 Origin of Data Element

The value will be taken from the ClassSchedule.ClassDate.

8.44.2.4.2 Format

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

8.44.2.5 *Time*

8.44.2.5.1 Origin of Data Element

The value will be taken from the ClassSchedule.ClassTime.

8.44.2.5.2 Format

The value will print in HH:MM {AM/PM} format.

8.44.2.6 Topic

8.44.2.6.1 Origin of Data Element

The value will be taken from the reference dictionary table of the lookup database for the ClassSchedule.ClassTypeID.

8.44.2.6.2 Format

The value will print as its literal value.

8.44.2.7 Staff Member

8.44.2.7.1 Origin of Data Element

The value will be taken from the AppointmentResource.Name for the ClassSchedule.AppointmentResourceID.

8.44.2.7.2 Format

The value will print as its literal value.

8.44.2.8 State WIC ID

8.44.2.8.1 Origin of Data Element

The value will be taken from the Member.StateWICID.

8.44.2.8.2 Format

The value will print as its literal value.

8.44.2.9 Participant Name

8.44.2.9.1 Origin of Data Element

The value will be taken from the Member.FirstName
Member.MiddleInitial and Member.LastName.

8.44.2.9.2 Format

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

8.44.2.10 Attended

8.44.2.10.1 Origin of Data Element

The value will be taken from the `ClassEnrollment.EnrollmentKept`.

8.44.2.10.2 Format

The value will print as its literal value.

8.44.2.11 Attendance Percentage

8.44.2.11.1 Origin of Data Element

This value is calculated by dividing the count of participants who attended the class by the count of participants who were enrolled in the class, multiplying the resulting value by 100, and rounding to the nearest whole number.

8.44.2.11.2 Format

The percentage value will print in `###%` format.

8.44.3 Filter Criteria

8.44.3.1 Classes Scheduled within Specified Date Range

All group classes with a class date occurring between the user-specified begin and end date will be included in the report.

8.44.4 Sort Order

8.44.4.1 Clinic Number

The report will be sorted first by Clinic number.

8.44.4.2 Date

The report will be sorted by the class date within Clinic number.

8.44.4.3 Time

The report will be sorted by the class time within the class date.

8.44.4.4 Topic

The report will be sorted by the class topic within the class time.

8.44.4.5 State WIC ID

The report will be sorted by the participant's State WIC ID within class topic.

8.44.5 Control Breaks

8.44.5.1 Time

A page break will occur at the change of class time.

8.44.5.2 Date

A page break will occur at the change of class date.

8.44.5.3 Clinic Number

A page break will occur at the change of Clinic.

8.44.6 Grand Total

A grand total has not been defined for this report.