# 9. Participant Folder

## *9.1 Participant Folder*

The Participant Folder is a view of the applicant or participant information. The system performs the same way whether the information is for an applicant or a participant, except where explicitly noted in the documentation.

Performing one of the following user actions opens a Participant Folder:

- Double-clicking on a participant record displayed in the Participant List
- Highlight a record in the Participant List and select the Open Participant Folder menu item on the Participant List menu.
- Highlight a record in the Participant List and select the Open Folder toolbar button
- Select a participant from the Work with Another Household Member menu item on the Participant Activities menu (see Work with Another Household Member as described in Common Interface Panels *Chapter B – Work with Another Household Member*.
- Select the Open Participant Folder radio button on the Applicant Prescreening dialog (see Clinic *Chapter 07 - Initial Contact*)

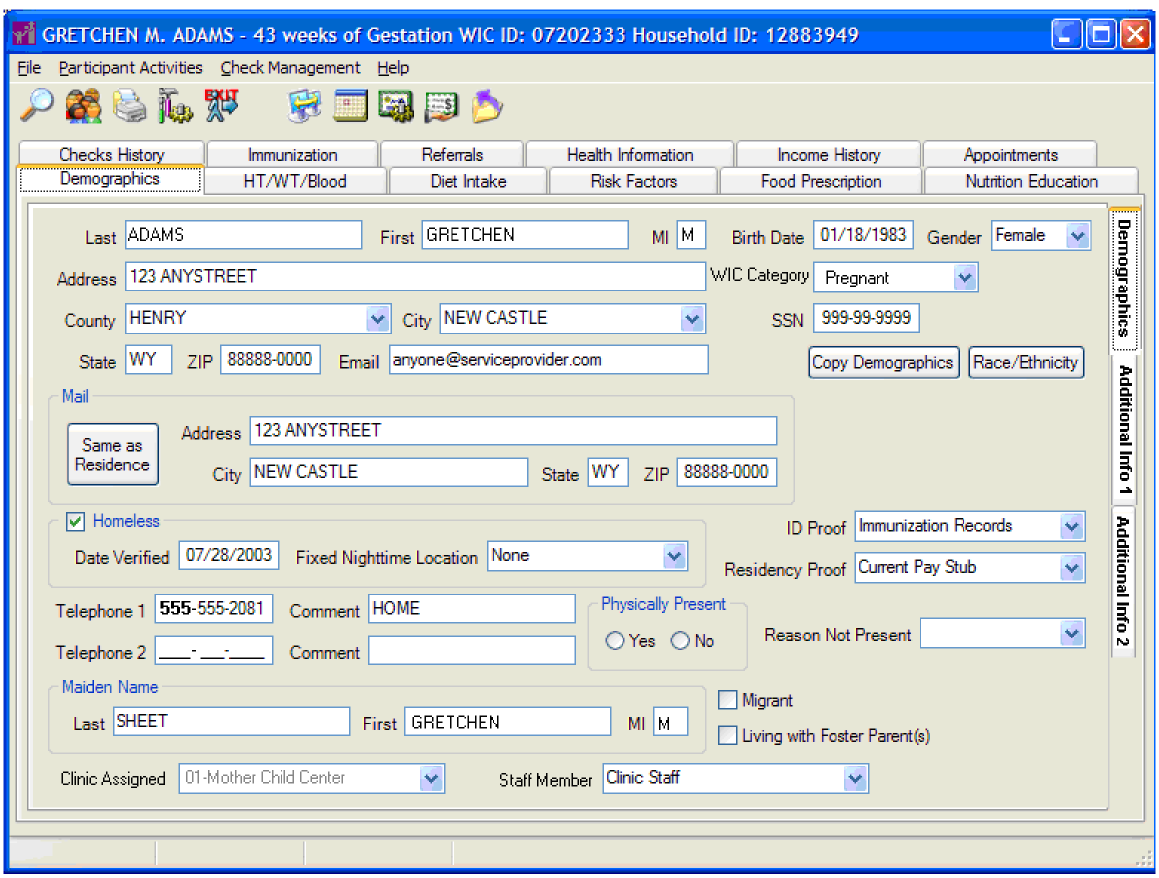



**Figure 1 – Participant Folder**

#### *9.1.1.1 Initializing the Interface*

Upon opening a Participant Folder, the system will verify if there is a certification in progress. If at least one certification is started and not completed, the controls on all Folder Tabs are locked and updating is not allowed until the Certification has been completed. This will apply if a record exists for the StateWICID in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

Upon initial display, set the title bar text to “Member.FirstName Member.MiddleInitial Member.LastName – Descriptive Value of Age – WIC ID: Member.StateWICID Household ID: Member.HouseholdID”

| **Descriptive Value of Age** |
|---|
| For ‘Infant’ display ‘XX’ Months ‘XX’ Days, calculated from the Date of Birth. |
| For ‘Child’ display ‘XX’ Year(s) ‘XX’ Months ‘XX’ Days calculated from the Date of Birth |
| For ‘Pregnant’ display ‘XX’ weeks gestation calculated from LMP |
| For ‘Breastfeeding' and ‘Non-breastfeeding’ display ‘XX’ Years calculated from the Date of Birth |

If the participant or a member of the participant’s household is flagged for an Alert, upon opening the participant’s folder, the system will automatically invoke the Display Alerts dialog defined in Common Interfaces Panels Chapter C – Display Alerts for Household Member.

The default tab displayed when the Participant Folder is opened will be the first available tab for which the user is granted permission. Refer to Security. When the user has 'View Only' permission for a specified tab of the Participant Folder, controls on the specified tab will be read-only and the values cannot be modified. When the user permissions are set to 'None' for a specified tab, the tab will be disabled and not available for selection. The following is a list of folder tabs available and the order in which the default and user permissions are verified when a participant folder is open:

| **Tab** |
|---|
| Demographics |
| Height/Weight/Blood (HT\WT\Blood) |
| VENA |
| Risk Factors |
| Food Prescription |
| Nutrition Education |
| Checks History |
| Immunizations |
| Referrals |
| Health Information tab [Infant/Child] |
| Health Information tab [Woman] |
| Income History |
| Appointments |

Once a folder is opened, depending on the WIC Category of the participant (or applicant) the folder will enable only those tabs and controls that apply to only the WIC Category of the participant. Refer to the respective tabs for specific information on Participant Folder tabs and sub-tabs.

#### *9.1.1.2 Edits (Participant Folder)*

Navigating among the participant folder does not invoke the edit and save processing **until** data is modified. If data is modified on a specific tab, the following actions will invoke the edit routines:

- Selecting another tab of the Participant Folder
- Closing the Participant Folder from the Close Participant Folder toolbar button
- Closing the Participant Folder from the Close Participant Folder menu item
- Invoking one of the following functions from a menu or toolbar button:
    - Search for Participant
    - Waiting List Manager
    - System Outputs
    - Appointment Scheduling
    - Check Issuance
- Exiting the Clinic Application from one of the following functions:
    - Exit toolbar button
    - Exit menu item
    - Clicking the X in the title bar
    - Double clicking the system menu icon on the title bar
    - Pressing Alt + F4

**Standard Processing of Participant Folder Edits and Save Routines**

If changes are made on a tab within the Participant Folder and the user attempts to exit the folder, exit the application or move onto another tab within the system, the system will invoke a standard warning message with the text "Do you want to save the changes on this tab?" The options of Yes, No and Cancel will be available.

- Select Yes
    - The system will invoke the edit and save routines for the tab. (see the respective tab for the specific edit and save routine information)
    - Upon successful validation of the data, the system will advance to the function requested by the user
- Select No
    - The system will discard the changes on the tab
    - The system will advance to the function requested by the user that invoked the save message.
- Select Cancel
    - The system returns to the current tab in its current state without saving or discarding changes.

## *9.2 Menu Exceptions*

In addition to the system menu options, when the Participant Folder is active, several additional menu items are available.

### 9.2.1 Participant Activities Menu

The menu will be enabled when the Participant Folder is active. It has a mnemonic of "P". It will display the following Menu Items:

- Toggle Applicant/Participant On-site
- Schedule Appointment
- Print Participant Appointment Schedule
- Certification
- Assign Risk Factors
- VOC Certification
- Breastfeeding
- Change Household ID
- Review CPA-determined Follow-up Information
- Generate Pending Termination Notice
- Manually Terminate Participant
- Reinstate Terminated Participant
- Produce VOC Document
- Work with Another Household Member
- Manage Notes
- Manage Alerts
- Print Participant Summary
- Remove Incomplete Certification

### 9.2.2 Menu Items

#### *9.2.2.1 Toggle Applicant/Participant On-site Menu Item*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "T" (see Clinic *Chapter 6 – Search and Selection* - Toggle Applicant/Participant On-site).

#### *9.2.2.2 Schedule Appointment Menu Item*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "A" (see Processing for *Schedule Appointment Toolbar Button*).

#### *9.2.2.3 Print Participant Appointment Schedule*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "I".

### *9.2.2.4 Certification Menu Item*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "E" (see Processing for *Certification Toolbar Button*).

### *9.2.2.5 Assign Risk Factors*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "K".

### *9.2.2.6 VOC Certification*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "O."

### *9.2.2.7 Breastfeeding*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "B".

### *9.2.2.8 Change Household ID Menu Item*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "H".

### *9.2.2.9 Review CPA-determined Follow-up Information Menu Item*

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period. It has a mnemonic of "P".

### *9.2.2.10 Generate Pending Termination Notice Menu Item*

The menu item will be enabled when the Participant Folder is active and the participant is due to be terminated by automatic means within 15 days. It has a mnemonic of "G".

### *9.2.2.11 Manually Terminate Participant Menu Item*

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period. It has a mnemonic of "M".

### *9.2.2.12 Reinstate Terminated Participant Menu Item*

The menu item will be enabled when the Participant Folder is active, the participant has been terminated from the current certification period and the current system date is less than or equal to the end of the certification date. The menu item has a mnemonic of "S".

### *9.2.2.13 Produce VOC Document*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "U".

### *9.2.2.14 Work with Another Household Member Menu Item*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "W".

### *9.2.2.15 Manage Notes Menu Item*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "N".

### *9.2.2.16 Manage Alerts Menu Item*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "L".

### *9.2.2.17 Print Participant Summary Menu Item*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "R".

### *9.2.2.18 Remove Incomplete Certification Menu Item*

The menu item will be enabled and an incomplete certification exists when the Participant Folder is active. It has a mnemonic of "V".

### *9.2.2.19 View Program Abuse Menu Item*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "U".

### *9.2.2.20 Close Participant Folder Menu Item*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "C" (See Processing for Close Participant Folder Toolbar Button).

### 9.2.3 Participant Activities Menu Items Processing

#### *9.2.3.1 Toggle Applicant/Participant On-site*

Upon selection of the Toggle Applicant/Participant On-site Menu Item, the system will function exactly as when selecting the Toggle Applicant/Participant On-site Toolbar Button as described in the next section of this document.

#### *9.2.3.2 Schedule Appointment*

Upon selection of the Schedule Appointment Menu Item, the system will function exactly as when selecting Schedule Appointment Toolbar Button as described in the next section of this document.

#### *9.2.3.3 Print Participant Appointment Schedule*

Upon selection of the Print Participant Appointment Schedule menu item, the system will print the Participant Appointment Schedule Report described in Clinic *Chapter 08 – Appointment Scheduling*.

#### *9.2.3.4 Certification*

Upon selection of the Certification Menu Item, the system will function exactly as when selecting Certification Toolbar Button as described in the next section of this document.

#### *9.2.3.5 Assign Risk Factors*

Upon selection of the Assign Risk Factors menu item, if the user does not have the appropriate permissions (Risk Factors.Add or FullControl), the system will invoke a standard error message with the text "You do not have the necessary permissions to assign risk factors.  Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed.  These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Certification Risk Factors dialog described in this document.

#### *9.2.3.6 VOC Certification*

Upon selection of the VOC Certification menu item, if the user does not have the appropriate permissions (Certification.FullControl), the system will invoke a standard error message with the text "You do not have the necessary permissions to perform a VOC Certification. Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the VOC Certification Dialog described in this document.

#### *9.2.3.7 Breastfeeding*

Upon selection of the Breastfeeding menu item, the system will display the following sub-menu items:

- Item Issuance History (mnemonic of 'H')
- Peer Counselor Contacts (mnemonic of 'B')
- Issue Breastfeeding Items (mnemonic of 'R')

##### 9.2.3.7.1 Item Issuance History

Upon selection of the Item Issuance History menu item, if the user does not have the appropriate permissions (BreastfeedingItemIssuance.View, Add or FullControl), the system will invoke a standard error message with the text "You do not have the necessary permissions to manage breastfeeding supplies. Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, if changes have been made, the required edits and confirmation messages to save or cancel the changes on the tab will also be performed. These edits are described in the respective sections for each tab.

If the user has permission and all edits are satisfied, the system will display the Breastfeeding Item Issuance History dialog as described in Common Interface Panels – *Chapter P - Breastpumps, Breastfeeding Kits and Supplies.*

#### 9.2.3.7.2 Issue Breastfeeding Items

Upon selection of the Issue Breastfeeding Items menu item, if the user does not have the appropriate permissions (BreastfeedingItemIssuance.View, Add or FullControl), the system will invoke a standard error message with the text "You do not have the necessary permissions to manage breastfeeding supplies. Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, if changes have been made, the required edits and confirmation messages to save or cancel the changes on the tab will also be performed. These edits are described in the respective sections for each tab.

If the user has permission and all edits are satisfied, the system will display the Issue Breastfeeding Items dialog as described in Common Interface Panels – *Chapter P - Breastpumps, Breastfeeding Kits and Supplies*.

#### 9.2.3.7.3 Peer Counselor Contacts

Upon selection of the Breastfeeding Peer Counselor Contacts menu item, if the user does not have the appropriate permissions (BreastfeedingContacts. View, Add or FullControl), the system will invoke a standard error message with the text "You do not have the necessary permissions to view breastfeeding peer counselor contact information. Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, if changes have been made, the required edits and confirmation messages to save or cancel the changes on the tab will also be performed. These edits are described in the respective sections for each tab

If the user has permission and all edits are satisfied, the system will save the information on the tab and invoke the Breastfeeding Peer Counselor Contacts dialog described in Common Interface Panels *Chapter Q - Breastfeeding Peer Counselor Contacts*.

### *9.2.3.8 Change Household ID*

Upon selection of the Change Household ID menu item, if the user does not have the appropriate permissions (Household.FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to change the Household ID for the applicant/participant. Please see the supervisor."

If the EBT_PROCESSOR_TYPE business rule is set to "0" (Zero or Off-line)

If the Household has an Electronic Benefits Account then edits will prevent moving the member from the household if there are any active unused, unexpired benefits unless the card is in the reader – To be completed with EBT COMPLIANT. Otherwise, the member will forfeit the benefits because they are linked to that card.

If the EBT_PROCESSOR_TYPE business rule is set to "1" (One or On-line)

If the Household has an Electronic Benefits Account then edits will allow the member to be changed to a different household and conform to the On-line processor interfaces – To be completed with EBT COMPLIANT. Otherwise, the member will forfeit the benefits because they are linked to that card.

Depending on the particular tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Change Household ID dialog described in Clinic *Chapter 12 - Participant Changes*.

### *9.2.3.9 Review CPA-determined Follow-up Information*

Upon selection of the Review CPA-determined Follow-up Information menu item, if the user does not have the appropriate permissions (CPAFollowUp.FullControl), the system will invoke a standard error message with the text "You do not have the necessary permissions to update CPA-determined follow-up information. Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the CPA-determined Follow-up dialog described in Common Interface Panels *Chapter O - CPA Determined Follow-up*.

### *9.2.3.10 Generate Pending Termination Notice*

Upon selection of the Generate Pending Termination Notice menu item, depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Generate Pending Termination Notice dialog described in this document.

### *9.2.3.11 Manually Terminate Participant*

Upon selection of the Manually Terminate Participant menu item, if the user does not have the appropriate permissions (ParticipantStatus.FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to manually terminate the certification for the participant. Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Manually Terminate Participant dialog described in Clinic *Chapter 12 - Participant Changes*.

### *9.2.3.12 Reinstate Terminated Participant*

Upon selection of the Reinstate Terminated Participant menu item, if the user does not have the appropriate permissions (ParticipantStatus.FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to reinstate the participant. Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Reinstate Terminated Participant dialog described in Clinic *Chapter 12 - Participant Changes*.

### *9.2.3.13 Produce VOC Document*

Upon selection of the Produce VOC Document menu item, if the user does not have the appropriate permissions (Certification.View or FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to Produce a VOC document. Please see the supervisor."

Only one Verification of Certification document may be produced for a participant during a certification period. When the user attempts to produce the VOC Document, the system will check the participant information to determine if a VOC has already been produced for the participant. If a VOC has been produced, the system invokes a standard error message with the text "The Verification of Certification document has already been produced for this certification period of the participant. Please contact the Help Desk for assistance with reprinting the Verification of Certification document."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Produce VOC Document dialog described in Clinic *Chapter 12 - Participant Changes*.

### *9.2.3.14 Work with Another Household Member*

Upon selection of the Work with Another Household Member menu item, the system will check for additional household members. If there are no other household members associated with the selected participant's household ID, the system will invoke a standard message with the message text, "No additional members exist for this household." Upon dismissing the message, the system will return to the participant's folder.

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, if additional members are found with the associated household ID, the system will save the information on the tab and invoke the Work with Another Household Member (Participant Folder) dialog defined in Common Interface Panels *Chapter B – Work with Another Household Member*.

### *9.2.3.15 Manage Notes*

Upon selection of the Manage Notes menu item, the system will invoke the View Notes for Household Member dialog has defined in this document.

### *9.2.3.16 Manage Alerts*

Upon selection of the Manage Alerts menu item, the system will invoke the Alerts list for Household dialog as defined in this document.

### *9.2.3.17 Print Participant Summary*

Upon selection of the Print Participant Summary menu item, if the participant does not have certification information the following message is displayed: "A certification attempt must exist on the system to produce a Participant Summary for the household member."

If the participant has certification information, the system will invoke the Produce Participant Summary dialog as defined in this document.

### *9.2.3.18 Remove Incomplete Certification*

Upon selection of the Remove Incomplete Certification menu item, the system will check the permissions for the currently logged-on user to determine if they have the Certification.FullControl permission to remove the certification. If the user does not have appropriate permissions, the system invokes a standard error message with the text “You do not have the necessary permissions to remove the incomplete certification. Please see the supervisor.”

If the user does have the Certification.FullControl permission, the system will display a message with the text “The current certification attempt will be removed for the participant along with all of its related information. This information cannot be recovered after it has been removed. Do you wish to continue?” If the user selects “Yes” the incomplete certification attempt will be removed for this participant. If the user select “No” the certification attempt will remain in tact and the user will be returned to the Participant Folder.

### *9.2.3.19 View Program Abuse*

Upon selection of the View Program Abuse menu item, the system will invoke the View Program Abuse dialog as defined in this document.

#### *9.2.3.20 Close Participant Folder*

Upon selection of the Close Participant Folder Menu Item, the system will function exactly as when selecting Close Participant Folder Toolbar Button as described in the next section of this document.

### 9.2.4 Check Management Menu

The menu will be enabled when the Participant Folder is active. It has a mnemonic of "C". It will display the following Menu Items:

- Issue Checks
- Void Checks Issued at This Clinic
- Void Check Issued at Other Clinic
- Mark Checks as Lost/Stolen
- Reprint Checks for Custody Change
- Add/Replace Set of Checks
- Issue Electronic Benefits (EBT) Food Instruments
- EBT Issuance to Void
- Add EBT Food Instrument
- Replace EBT Issued Benefits

### 9.2.5 Menu Items

#### *9.2.5.1 Issue Checks Menu Item*

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period. It has a mnemonic of "I" (see Processing for Issue Checks Toolbar Button).

#### *9.2.5.2 Void Checks Issued at This Clinic Menu Item*

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period. It has a mnemonic of "V".

#### *9.2.5.3 Void Checks Issued at Other Clinic Menu Item*

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period. It has a mnemonic of "D".

#### *9.2.5.4 Mark Checks as Lost/Stolen Menu Item*

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period. It has a mnemonic of "R".

#### *9.2.5.5 Reprint Checks for Custody Change*

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period. It has a mnemonic of "K".

#### *9.2.5.6 Add/Replace Set of Checks*

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period or the current system date is less than or equal to the next expected last date to use occurring after the certification end date. It has a mnemonic of "L".

#### *9.2.5.7 Issue Electronic Benefits (EBT) Food Instrument Menu Item*

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period. It has a mnemonic of "I" (see Processing for Issue Checks Toolbar Button). It has a mnemonic of "_".

#### *9.2.5.8 EBT Issuance to Void Menu Item*

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period. It has a mnemonic of "_".

#### *9.2.5.9 Add EBT Food Instrument*

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period or the current system date is less than or equal to the next expected last date to use occurring after the certification end date. It has a mnemonic of "_".

#### *9.2.5.10 Replace EBT Issued Benefits*

The menu item will be enabled when the Participant Folder is active and the participant is in a valid certification period or the current system date is less than or equal to the next expected last date to use occurring after the certification end date. It has a mnemonic of "_".

### 9.2.6 Document Imaging Menu

The menu will be enabled when the Participant Folder is active. It has a mnemonic of "D". It will display the following Menu Items:

- Scan a Document
- View Scanned Documents

### 9.2.7 Menu Items

#### *9.2.7.1 Scan a Document*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "S".

#### *9.2.7.2 View Scanned Documents*

The menu item will be enabled when the Participant Folder is active. It has a mnemonic of "V".

### 9.2.8 Document Imaging Menu Processing

#### *9.2.8.1 Scan a Document*

Upon selection of the Scan a Document sub-menu, the system will check the permissions for the currently logged-on user to determine if they have the DocumentImaging.Add permission. If the user does not have appropriate permissions, the system invokes a standard error message with the text "You do not have the necessary permissions to scan a document. Please see the supervisor." If the user does have the DocumentImaging.Add permission, the system will display the Scan a Document dialog as described in Clinic – *Chapter 14 – Document Imaging*.

#### *9.2.8.2 View Scanned Documents*

Upon selection of the View Scanned Documents sub-menu, the system will check the permissions for the currently logged-on user to determine if they have the DocumentImaging.View permission. If the user does not have appropriate permissions, the system invokes a standard error message with the text "You do not have the necessary permissions to view scanned documents. Please see the supervisor." If the user does have the DocumentImaging.View permission, the system will display the Scanned Documents dialog as described in Clinic – *Chapter 14 – Document Imaging*.

### 9.2.9 Check Management Menu Items Processing

#### *9.2.9.1 Issue Checks*

Upon selection of the Issue Checks Menu Item, the system will function exactly as when selecting Issue Checks Toolbar Button as described in the next section of this document.

### *9.2.9.2 Void Checks Issued at This Clinic*

Upon selection of the Void Checks Issued at This Clinic menu item, if the user does not have the appropriate permissions (CheckIssuance.FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to void checks for the participant. Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Identify Checks to Void dialog described in Clinic *Chapter 11 - Food Instrument Production*.

### *9.2.9.3 Void Checks Issued at Other Clinic*

Upon selection of the Void Checks Issued at Other Clinic menu item, if the user does not have the appropriate permissions (CheckIssuance.FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to void checks for the participant. Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Void Checks Issued at Another Clinic dialog described in Clinic *Chapter 11 - Food Instrument Production*.

### *9.2.9.4 Mark Checks as Lost/Stolen*

Upon selection of the Mark Checks as Lost/Stolen menu item, if the user does not have the appropriate permissions (CheckIssuance.FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to mark checks as lost/stolen for the participant. Please see the supervisor."

Depending on the particular tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Identify Lost/Stolen Checks dialog described in Clinic *Chapter 11 - Food Instrument Production*.

### *9.2.9.5 Reprint Checks for Custody Change*

Upon selection of the Reprint Checks for Custody Change menu item, if the user does not have the appropriate permissions (CheckIssuance.FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to reprint checks for the participant. Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Identify Checks to Reprint for Custody Change dialog described in Clinic *Chapter 11 - Food Instrument Production*.

### *9.2.9.6 Add/Replace Set of Checks*

Upon selection of the Add/Replace Set of Checks menu item, if the user does not have the appropriate permissions (CheckIssuance.FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to add or replace sets of checks for the participant. Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed. These edits are described in the respective sections for each Tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Add/Replace Set of Checks dialog described in Clinic *Chapter 11 - Food Instrument Production*.

### *9.2.9.7 Issue Electronic Benefits (EBT) Food Instruments*

Upon selection of the Issue Electronic Benefits (EBT) Food Instruments Menu Item, the system will function exactly as when selecting Issue Checks Toolbar Button as described in the next section of this document.

#### *9.2.9.8 EBT Issuance to Void*

Upon selection of the EBT Issuance to Void menu item, if the user does not have the appropriate permissions (CheckIssuance.FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to void checks for the participant.  Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed.  These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the EBT Issuance to Void dialog described in Clinic *Chapter 11 - Food Instrument Production*.

#### *9.2.9.9 Add EBT Food Instrument*

Upon selection of the Add EBT Food Instrument menu item, if the user does not have the appropriate permissions (CheckIssuance.FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to add or replace sets of checks for the participant.  Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed.  These edits are described in the respective sections for each Tab.

When all edits are satisfied, the system will save the information on the tab and invoke Add EBT Food Instrument dialog described in Clinic *Chapter 11 –Food Instrument Production*.

#### *9.2.9.10 Replace EBT Issued Benefits*

Upon selection of the Replace EBT Issued Benefits menu item, if the user does not have the appropriate permissions (CheckIssuance.FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to add or replace sets of checks for the participant.  Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed.  These edits are described in the respective sections for each Tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Replace EBT Issued Benefits dialog described in Clinic *Chapter 11 –Food Instrument Production*.

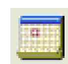
### *9.3 Toolbar Exceptions*

In addition to the system toolbar options, when the Participant Folder is active several additional toolbar options are available.

**Figure 2 - Participant Folder Toolbar**

#### 9.3.1 Toggle Applicant/Participant On-site Toolbar Button 

The toolbar button will be enabled when the Participant Folder is active. It has a tool tip text of “Toggle Applicant/Participant On-site”.

#### 9.3.2 Schedule Participant Appointment Toolbar Button 

The toolbar button will be enabled when the Participant Folder is active. It has a tool tip text of “Schedule Participant Appointment”.

#### 9.3.3 Certification Toolbar Button 

The toolbar button will be enabled when the Participant Folder is active. It has a tool tip text of “Certification”.

#### 9.3.4 Issue Checks Toolbar Button 

The toolbar button will be enabled when the Participant Folder is active and the participant is in a valid certification period. It has a tool tip text of “Issue Checks”.

##### 9.3.4.1.1 EBT Ready Notes

If EBT is enabled and if the household is an EBT household then EBT food instruments will be issued rather than paper food instruments.

If the FI_ENABLE_DELIVERYSYSTEMTYPE_EBT business rule is set to "Y" and the FoodDeliverySystemEBT value in the ServiceSite table for this clinic is set to "Y" (Yes) and the CompletedEBTCertification value in the ServiceSite table for this clinic is set to "Y" (Yes) meaning the ServiceSite logged into has not been certified as EBT Compliant.

### 9.3.5 Close Participant Folder Toolbar Button 

The toolbar button will be enabled when the Participant Folder is active. It has a tool tip text of "Close Participant Folder".

### 9.3.6 Toolbar Processing

#### *9.3.6.1 Toggle Applicant/Participant On-site*

Upon selecting the Toggle Applicant/Participant On-site toolbar button, depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Toggle Applicant/Participant as On-site dialog described in Clinic *Chapter 06 - Search-Selection*.

#### *9.3.6.2 Schedule Participant Appointment*

Upon selection of the Schedule Participant Appointment toolbar button, if the user does not have the appropriate permissions (Appointments.Add or FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to schedule appointments. Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system will save the information on the tab and invoke the Select Appointment to Schedule dialog described in Clinic *Chapter 08 - Appointment Scheduling*.

### *9.3.6.3 Certification*

Upon selection of the Certification toolbar button, if the user does not have the appropriate permissions (Certification.FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to update Certification. Please see the supervisor."

When the participant is within a valid certification period, the system will check that the current system date is within 45 days inclusive of the end of the current certification for the participant. When the current system date is not within 45 days of the end of the current certification for the participant, and the participant is not postpartum (WICStatus <> 'B' or 'N'), the system invokes a standard error message with the text "A new certification attempt cannot be started for the participant until 45 days before the end of the current certification period for the participant."

If the system date is within the 45 days, the system will then verify the WIC Category of the participant. If the participant is within 45 days inclusive of the end of the current certification and has a WIC Category of postpartum (WICStatus = 'B' or 'N'), the system will invoke a standard error message with the text "Only a new Pregnant certification attempt can be started for a participant who has more than 45 days before the end of her current postpartum certification period."

- When the OK button is selected on the error message the Certification WIC Category dialog will display as described in Clinic *Chapter 10 - Certification Guided Script*.

When the participant is ineligible for certification, the system invokes a standard error message with the text "This applicant/participant is ineligible to be certified for WIC benefits."

- This message will display only if the participant's most current certification was marked as ineligible and the certification ineligibility date is not less than the current system date.

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed. These edits are described in the respective sections for each tab.

When a certification attempt has not previously been started for the participant, the system invokes a standard message dialog with the text "Do you want to start a certification attempt for the participant?" The options of Yes and No will be available.

- Select 'No', the system will return to the Participant Folder.
- Select 'Yes', the system invokes the Certification Guided Script window described in Clinic *Chapter 10 - Certification Guided Script*.

If the system date is within the 45 days, the system will then verify the WIC Category of the participant. If the participant is within 45 days inclusive of the end of the current certification and has a WIC Category of pregnant (WICStatus = 'P'), the system will display the Certification WIC Category dialog will display as described in Clinic *Chapter 10 - Certification Guided Script.*

### *9.3.6.4 Issue Checks*

Upon selection of the Issue Checks toolbar button, if the user does not have the appropriate permissions (CheckIssuance.Add or FullControl), the system invokes a standard error message with the text "You do not have the necessary permissions to issue checks for the participant. Please see the supervisor."

Depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will also be performed. These edits are described in the respective sections for each tab.

If a member of the household is an infant or a child and is currently breastfeeding the system will verify the Verified Date is equal to the current system date. If the date is not equal to the current system date, the system will invoke a standard error message "Checks will not be issued for participants {Statewicid} {Last Name}, {First Name}

REASON: The participant is currently marked as breastfeeding now. Please go to the Child Health Information tab and verify the breastfeeding category. Checks cannot be issued until the breastfeeding category is verified."

If the Homeless check box is checked and the Homeless Verified Date is 30 days prior to the current system date, the system will invoke a standard error message "Checks will not be issued for participants {Statewicid} {Last Name}, {First Name}

REASON: The participant is currently marked as homeless. Please go to the Demographics tab and verify the homeless status. Checks cannot be issued until the homeless status is verified."

If the difference between the last date to use attribute on the member entity and the system date is not 27 days or less for any participant in the household, the system will invoke a standard error message "Checks will not be issued for participants {Statewicid} {Last Name}, {First Name}

REASON: The difference between the Last Date to Use and the current system date is not 27 days or less."

When all edits are satisfied, the system invokes the Issue Checks dialog described in Clinic *Chapter 11 - Food Instrument Production.*

#### *9.3.6.5 Close Participant Folder*

Upon selection of the Close Participant Folder toolbar button, depending on the tab of the Participant Folder that is currently selected, the required entry edits and cross-edits for the controls on the tab will be performed. These edits are described in the respective sections for each tab.

When all edits are satisfied, the system closes the Participant Folder and returns the Participant List in its previous state.

### *9.4 Demographics Tab (Demographics Sub-tab)*

The Demographics sub-tab of the Demographics tab of the Participant Folder allows the user to view and update basic demographic information about the participant. It is invoked in response to the following user actions:

- Selection of the Demographics sub-tab while the Demographics tab is active in the Participant Folder
- Selection of the Demographics tab in the Participant Folder

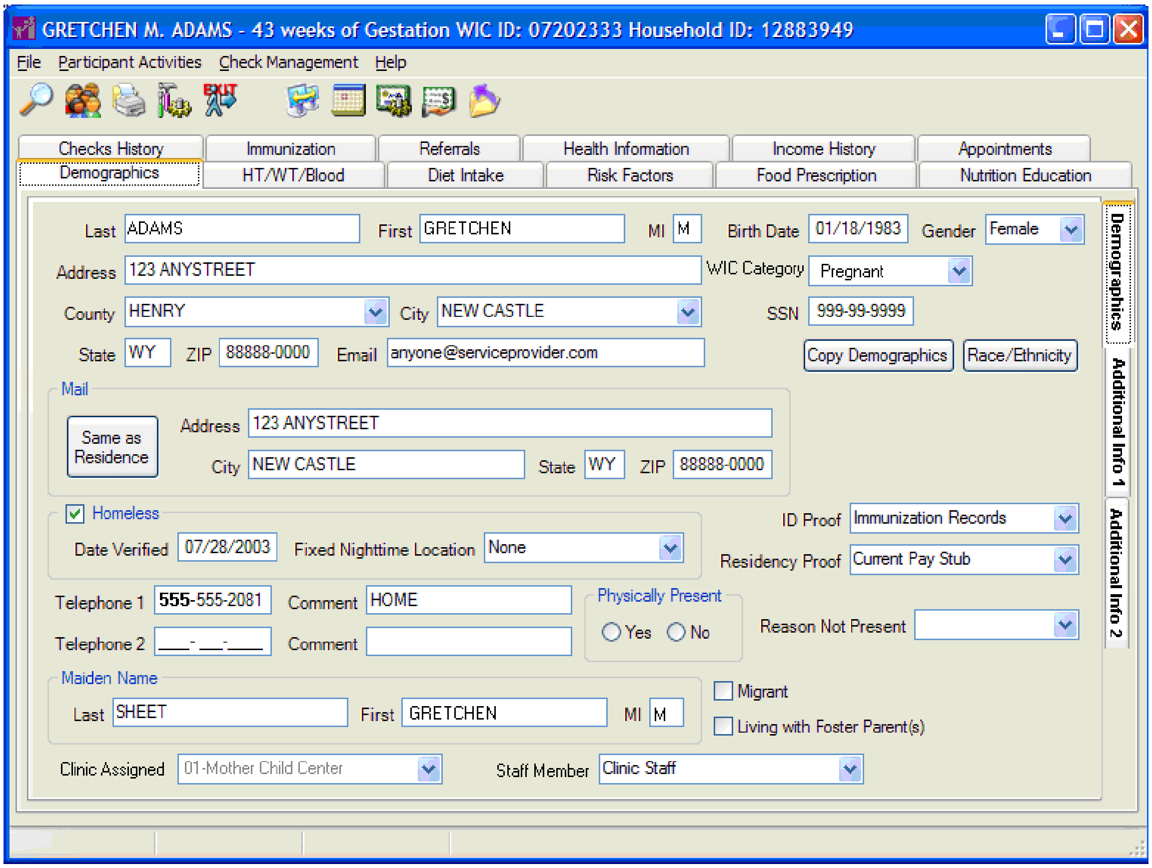



**Figure 3 - Demographics Tab (Demographics Sub-tab)**

## 9.4.1 Controls

The Demographics Tab displays the Panels for Demographics, Additional Info 1, and Additional Info 2 Sub-tabs. All controls and functionality are defined in Common Interface Panels *Chapter A - Demographic Information Panels –* Demographics Sub-tab.

### 9.4.2 Processes

The system will verify if there is a certification in progress. If at least one certification is started and not completed, the controls on **all Demographic sub-tabs** (Demographics sub-tab, Additional Info 1 sub-tab and Additional Info 2 sub-tab) are locked and updating is not allowed until the Certification has been completed. This will apply if a record exists for the selected StateWICID in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

## *9.5 Demographics Tab (Additional Info 1 Sub-tab)*

The Additional Info 1 sub-tab of the Demographics Tab contains additional information about the participant. It is invoked when the user selects the Additional Info 1 sub-tab while the Demographics tab is active in the Participant Folder.

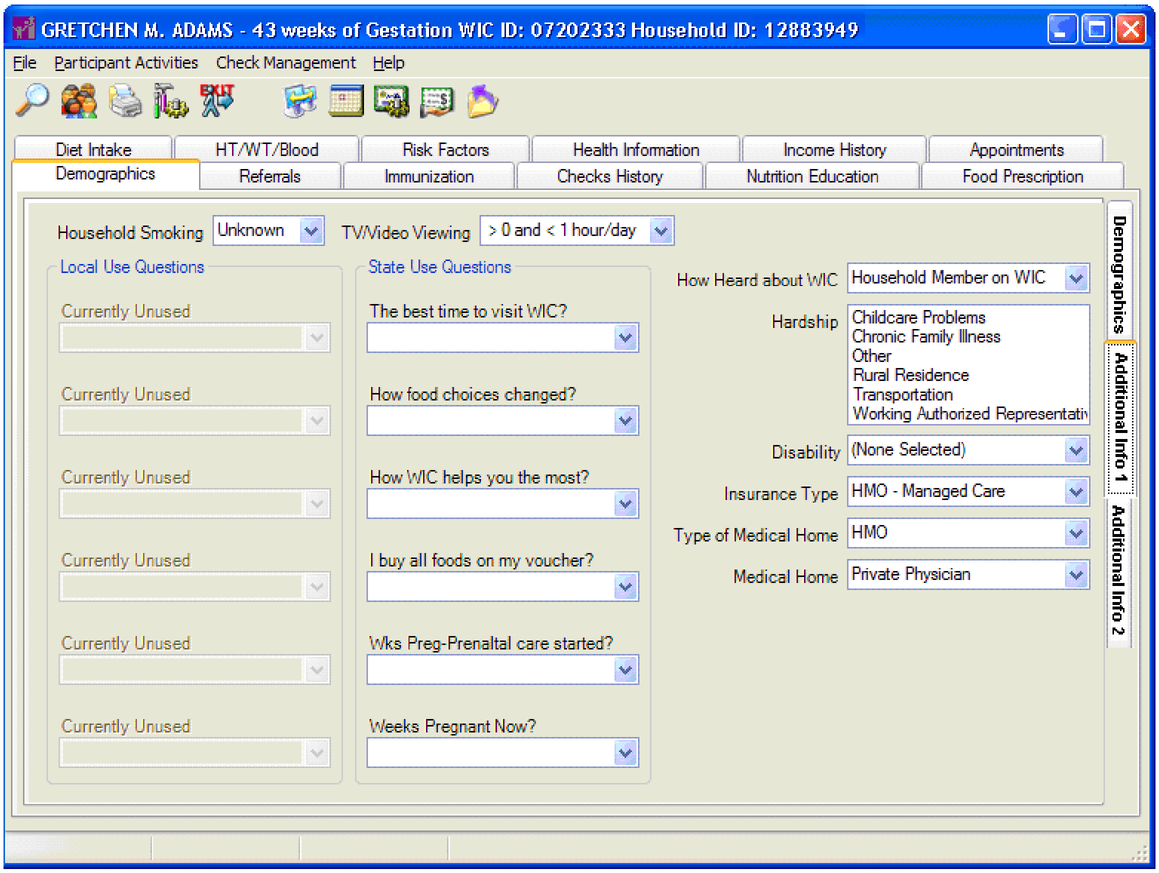



**Figure 4 - Demographics Tab (Additional Info 1 Sub-tab)**

### 9.5.1 Controls

All controls on this dialog are part of the common interface panels defined in Common Interface Panels *Chapter A – Demographic Information Panels*

### 9.5.2 Processes

The system will verify if there is a certification in progress. If at least one certification is started and not completed, the controls on **all Demographic sub-tabs** (Demographics sub-tab, Additional Info 1 sub-tab and Additional Info 2 sub-tab) are locked and updating is not allowed until the Certification has been completed. This will apply if a record exists for the selected StateWICID in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

### *9.6 Demographics Tab (Additional Info 2 Sub-tab)*

The Additional Info 2 sub-tab of the Demographics tab contains more information for the participant. It is invoked when the user selects the Additional Info 2 sub-tab while the Demographics tab is active in the Participant Folder.

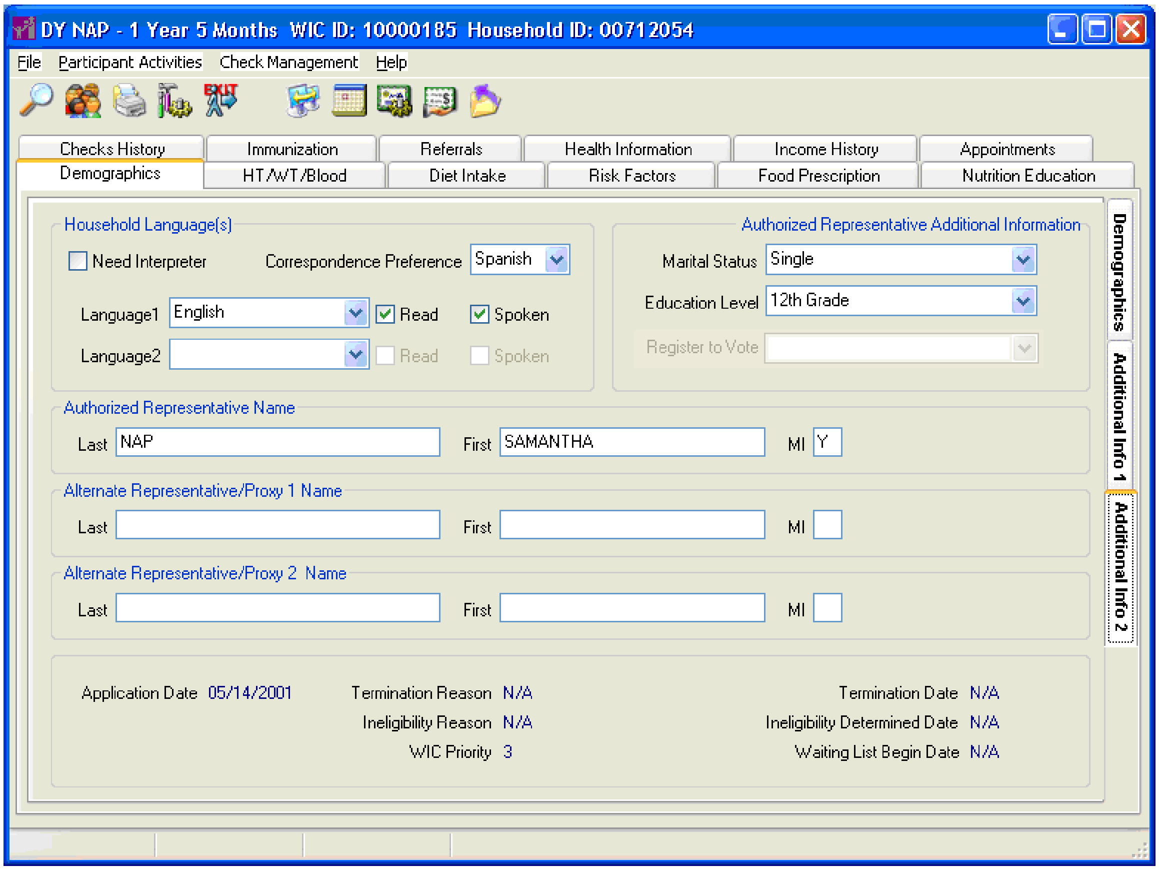



**Figure 5 - Demographics Tab (Additional Info 2 Sub-tab - Infant/Child)**

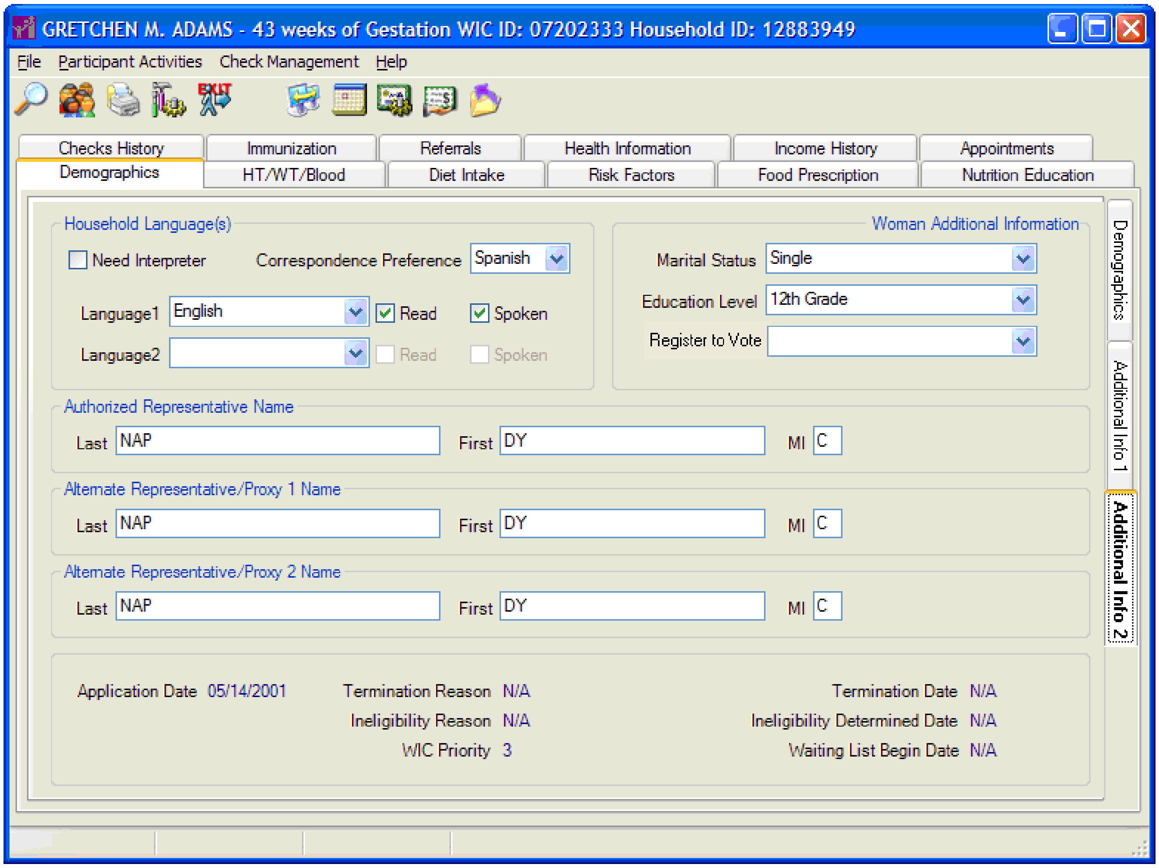



**Figure 6 - Demographics Tab (Additional Info 2 Sub-tab - Woman)**

### 9.6.1 Controls

The controls for the Additional Sub-tab 2 are defined in Common Interface Panels *Chapter A – Demographic Information Panels*.

### 9.6.2 Processes

The system will verify if there is a certification in progress. If at least one certification is started and not completed, the controls on **all Demographic sub-tabs** (Demographics sub-tab, Additional Info 1 sub-tab and Additional Info 2 sub-tab) are locked and updating is not allowed until the Certification has been completed. This will apply if a record exists for the selected StateWICID in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

### *9.7 Height/Weight/Blood Tab (Height/Weight Sub-tab)*

The Height/Weight sub-tab of the Height/Weight/Blood tab of the Participant Folder allows the user to view, add, or edit anthropometric measurements for the participant. It is the default sub-tab displayed when the user selects the Height/Weight/Blood tab when the participant folder is open. It is invoked when the user selects the Height/Weight sub-tab from the Blood sub-tab while the Height/Weight/Blood tab is active.

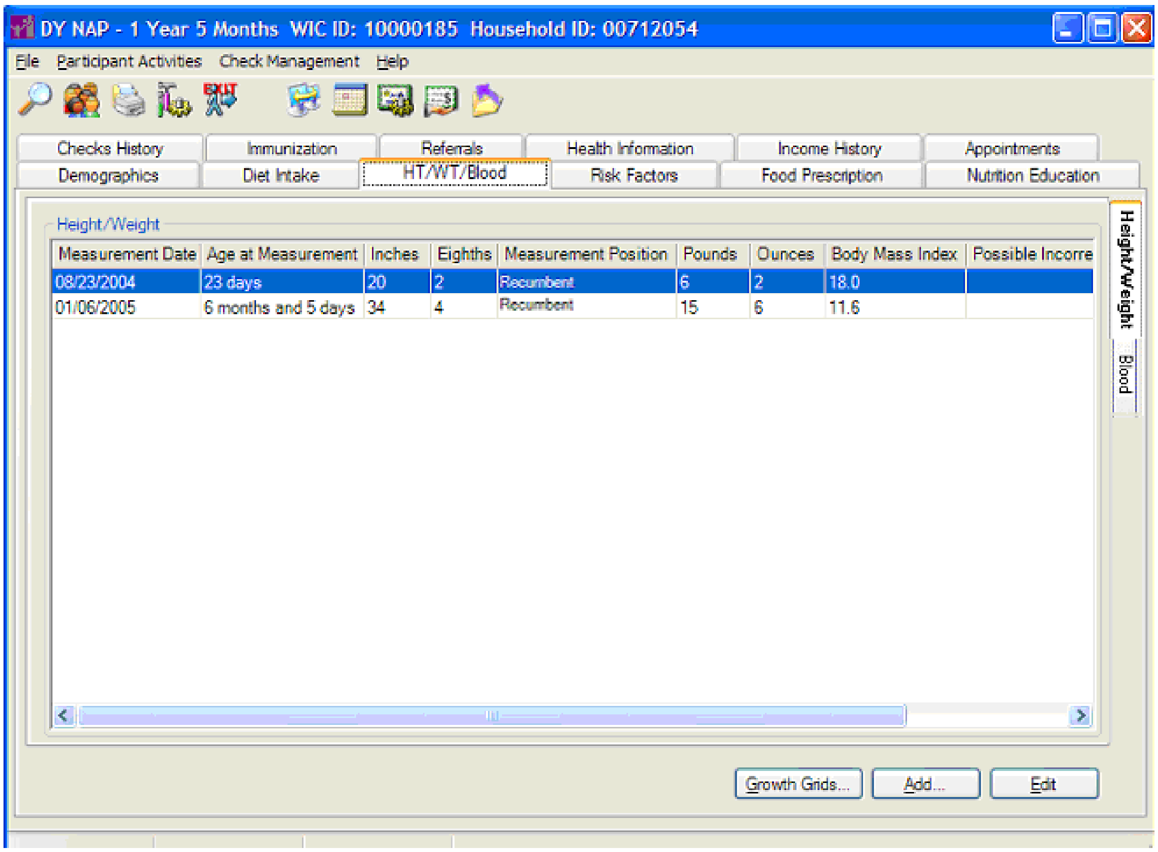



**Figure 7 - HT/WT/Blood Tab (Height/Weight Sub-tab)**

## 9.7.1 Controls

The controls for the Height/Weight sub-tab of the Height/Weight/Blood tab are defined in Common Interface Panels *Chapter G - Height Weight Bloodwork*.

### 9.7.2 Processes

The system will verify if there is a certification in progress. If at least one certification is started and not completed, the controls on the Height/Weight and Blood panel are locked and adding records, updating records or viewing growth grids is not allowed until the Certification has been completed. This will apply if a record exists for the selected StateWICID in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

## *9.8 Height/Weight/Blood Tab (Blood Sub-tab)*

The Blood sub-tab of the Height/Weight/Blood tab of the Participant Folder allows the user to view, add, or edit blood work results for the participant. It is invoked when the user selects the Blood sub-tab while the Height/Weight/Blood tab is active in the Participant Folder.

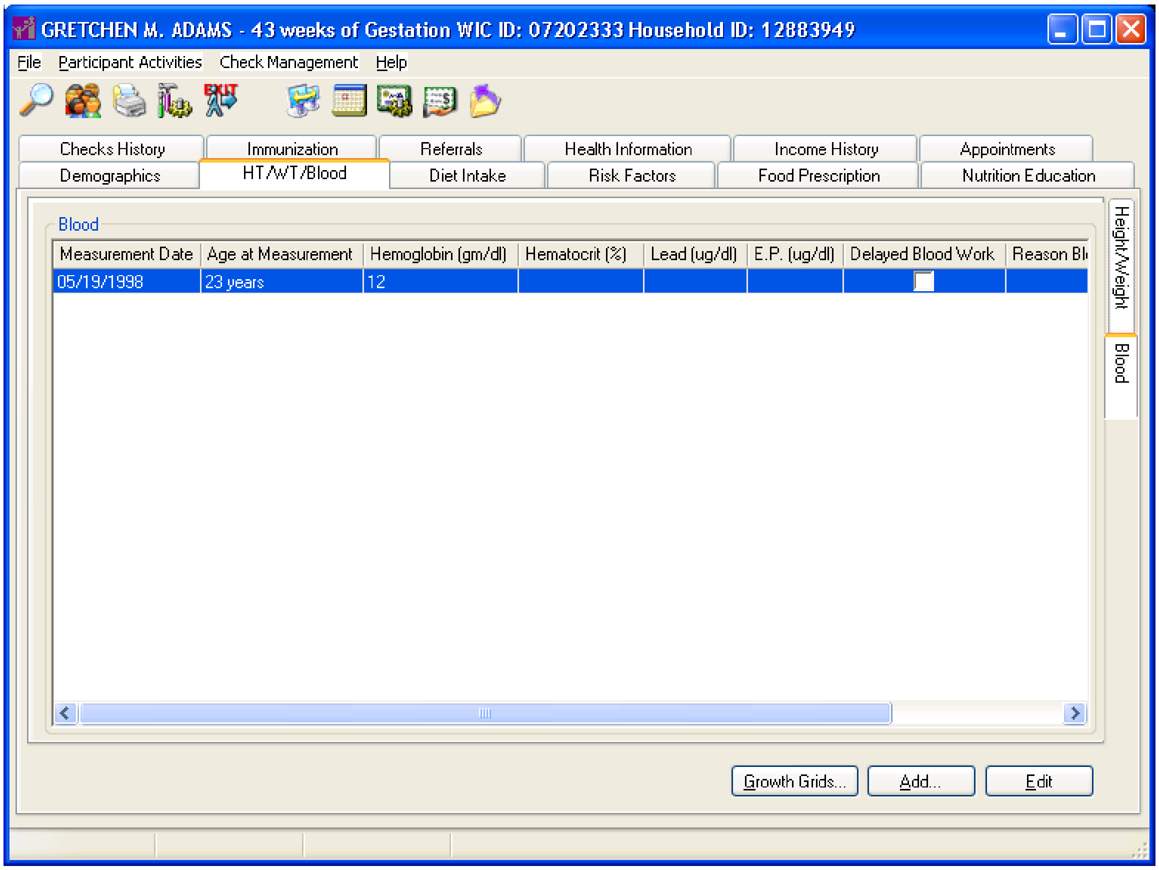



**Figure 8 - Height/Weight/Blood Tab (Blood Sub-tab)**

### 9.8.1 Controls

The controls for the Blood sub-tab of the Height/Weight/Blood tab are defined in Common Interface Panels *Chapter G – Height Weight Bloodwork.*

### 9.8.2 Processes

The system will verify if there is a certification in progress. If at least one certification is started and not completed, the controls on the Height/Weight and Blood panel are locked and adding records, updating records or viewing growth grids is not allowed until the Certification has been completed. This will apply if a record exists for the selected StateWICID in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

### *9.9 VENA Tab*

The VENA Contact interface allows the user to view, add, edit, and delete VENA contact information. This interface can be found on the VENA tab of the Participant Folder as well as the VENA panel from within the Certification Guided Script.

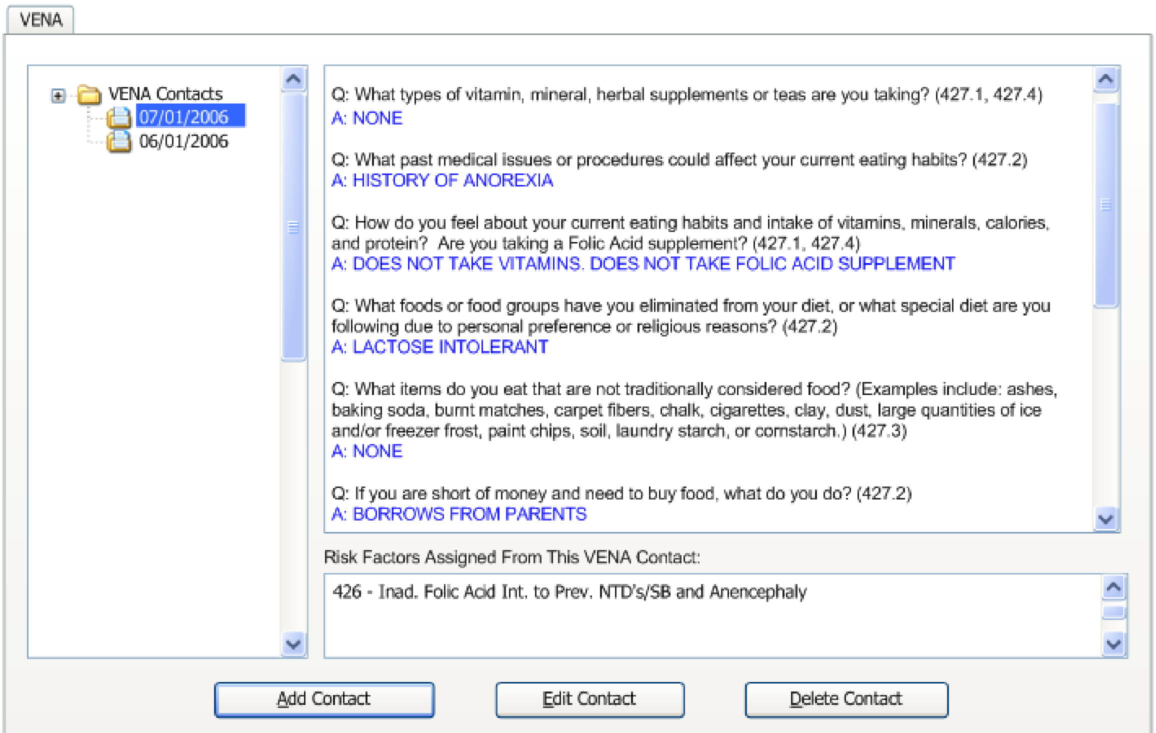



**Figure 9 - VENA Panel (Participant Folder)**

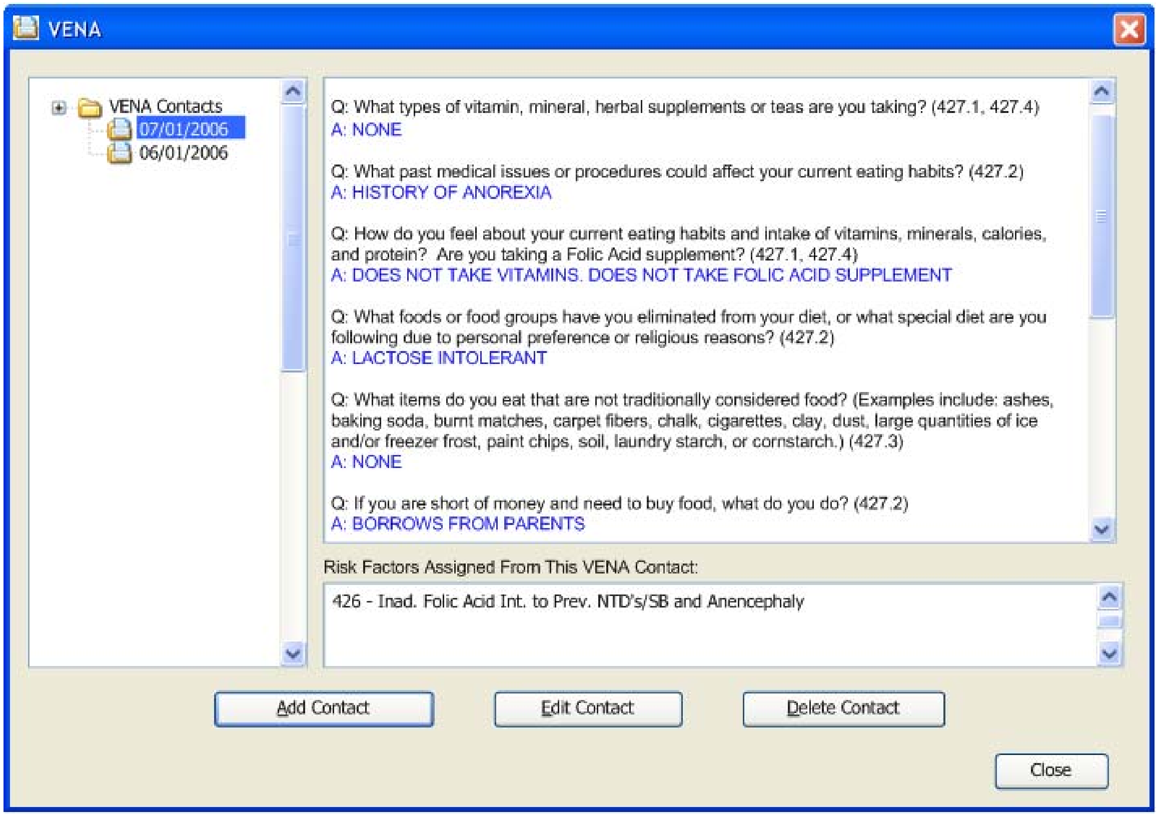



**Figure 10 - VENA Panel (Certification Guided Script)**

## 9.9.1 Controls

This section describes the behavior of the controls on the VENA panel. The controls for the VENA tab are defined in Common Interface Panels *Chapter T – VENA*.

### *9.9.1.1 VENA Contacts Display Tree View*

This control allows the user to view the VENA contacts for the participant along with information gathered at the time of the contact including answers to questions and risk factors assigned. The tree view will be enabled when the VENA panel is active. It will consist of the following hierarchical structure:

VENA Root

|

|_VENA Contact Node

The panel will display all existing VENA contacts for the participant. If none exist, the root node of the tree will display the text “No VENA contacts exist for this participant.” Otherwise, the root node will display the text “VENA Contacts”.

VENA contacts will display in chronological order with the most recent contact (determined by the contact date) appearing at the top of the list. The most recent VENA contact will be selected. The data values on the tree view will be read-only.

#### *9.9.1.2 VENA Contact Tree View Node*

This node of the VENA display tree view allows the user to view the date on which the VENA contact took place. The node will consist of an appropriate icon and VENA contact date in the format of MM/DD/CCYY. Selecting a contact on the tree view refreshes the contact detail and risk factors controls.

#### *9.9.1.3 Contact Detail Text Box*

This control allows the user to view the questions posed and answers provided for the selected VENA contact. Questions will be prefaced with “Q:” and are displayed in black text. Answers are prefaced with “A:” and are displayed in blue text. There is a blank line between each question/answer pair for readability. All information in the text box is read-only. The questions will be loaded from VENAQUESTON.CAPTION for each VENACONTACTITEM.QUESTIONID. The answers will be loaded from VENACONTACTITEM.ANSWER.

#### *9.9.1.4 Risk Factors Assigned from this VENA Contact List Box*

This control allows the user to view the list of risk factors that were assigned to the participant by the staff member as part of the selected VENA contact. Items in the list are read-only and are formatted as follows:

- [999] – [Risk Factor Description]

Where [999] is the risk factor ID and [Risk Factor Description] is the description of the risk factor. All information in the list box is read-only.

### *9.9.1.5 Add Contact Button*

This control allows the user to add a VENA contact for the participant. Pressing this button displays the VENA Contact dialog. The Add Contact button will be enabled when the VENA tab is active. In the Central Administrative Site and State Office mode, the Add Contact button will not be visible. It will have a mnemonic of “A” and will be the default button for the dialog. Upon successfully returning from the VENA Contact dialog (add mode), the new contact is added to the tree view and is automatically selected.

### *9.9.1.6 Edit Contact Button*

This control allows the user to edit a VENA contact for the participant. Pressing this button displays the selected VENA contact using the VENA Contact dialog. The Edit button will be enabled when the VENA tab is active and a VENA contact is selected in the tree view. The VENA contact may be edited from the Participant Folder VENA tab only if the VENA contact was added through the Participant Folder and the edit date is the same date as the date the VENA contact was added and is not associated with a completed Certification for the participant. In the Central Administrative Site and State Office mode, the Edit Contact button will not be visible. It will have a mnemonic of “E”. Upon successfully returning from the VENA Contact dialog (Edit mode), the selected contact information is updated to reflect the changes made while editing the contact.

### *9.9.1.7 Delete Contact Button*

This control allows the user to delete a VENA contact for the participant. The Delete Contact button will be enabled when the VENA tab is active and a VENA contact record with a contact date equal to the current system date is selected in the tree view and no risk factors were assigned while saving the contact. Prior to deleting the contact, the system will prompt the user to confirm the delete request. The VENA contact may be deleted from the Participant Folder VENA tab only if the VENA contact was added through the Participant Folder and the contact date is the same date as the date the VENA contact was entered and is not associated with a completed Certification for the participant. In the Central Administrative Site and State Office mode, the Delete Contact button will not be visible. It will have a mnemonic of “D”.

### *9.9.1.8 Close Button*

Pressing this control dismisses the VENA Dialog. Characteristics of the Close button are defined in *Consistencies*.

## 9.9.2 Processes

### *9.9.2.1 Initializing the Interface*

The VENA Contacts display tree view displays previously saved VENA contacts in reverse chronological order. The first (most recent) date in the tree view will initially be selected. The Contact Detail text box and the Risk Factors list box will initially contain the information associated with the VENA contact selected in the tree.

### *9.9.2.2 Edits*

There are no updateable controls on the VENA tab; therefore, there are no edits performed on this panel.

### *9.9.2.3 Saving the Data*

There are no updateable controls on the VENA tab; therefore, no data is written to the database.

### *9.9.2.4 Add VENA Contact Information*

Upon selection of the Add Contact button, the system will invoke the VENA Contact dialog in Add mode. If the user does not have the appropriate permissions (VENAContact.Add or FullControl), the system will invoke a standard error message with the text “You do not have the necessary permissions to add a VENA contact. Please see the supervisor.”

### *9.9.2.5 Edit VENA Contact Information*

Upon selection of the Edit Contact button, the system will invoke the VENA Contact dialog in Edit mode. If the user does not have the appropriate permissions (VENAContact.Edit or FullControl), the system will invoke a standard error message with the text “You do not have the necessary permissions to edit a VENA contact. Please see the supervisor.”

### *9.9.2.6 Delete VENA Contact Information*

Upon selection of the Delete Contact button, the system will present a delete confirmation message. The message text will be: “Are you sure you want to delete the selected VENA Contact?” Yes and No buttons will be available. The No button will be the default button for the confirmation dialog. If the user does not have the appropriate permissions (VENAContact.Delete or FullControl), the system will invoke a standard error message with the text “You do not have the necessary permissions to delete a VENA contact. Please see the supervisor.”

### *9.9.2.7 Data Map*

| **Control** | **Table** | **Column** | **Comments** |
|---|---|---|---|
| VENA Contacts | VENACONTACT | CONTACTDATE | Read only |
| | VENACONTACT | RFASSIGNED | Y if any risk factors were assigned. |
| Contact Details | (Question Text)VENAQUESTION | (Question Text) CAPTION for the QUESTIONID in VENACONTACTITEM | |
| Contact Details | (Answer Text)VENACONTACTITEM | (Answer Text) ANSWER | |
| Risk Factors | VENACONTACTRF | RISKFACTORID | |
| | | | |

## *9.10 Risk Factors Tab*

The Risk Factors tab of the Participant Folder allows the user to view the current and past certifications for the participant, and the risk factors associated with the certification. It is invoked when the user selects the Risk Factors in the Participant Folder.

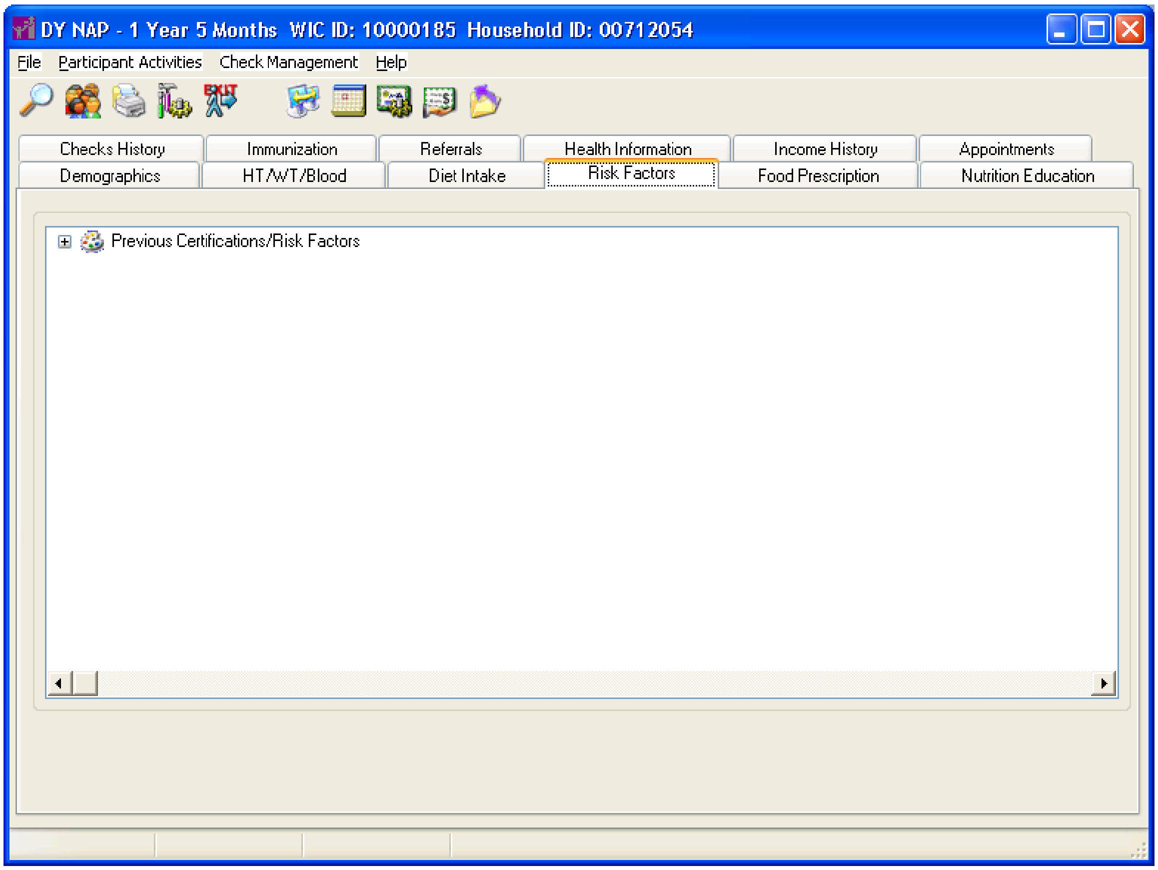



**Figure 11 - Risk Factors Tab**

### 9.10.1 Controls

The controls for the Risk Factors tab are defined in Common Interface Panels *Chapter K – Risk Factors*.

### 9.10.2 Processes

There are no processes defined on the Risk Factors tab.

## *9.11 Food Prescription Tab*

The Food Prescription tab of the Participant Folder allows the user to view previous food prescriptions for the participant. It is invoked when the user selects the Food Prescription tab in the Participant Folder.

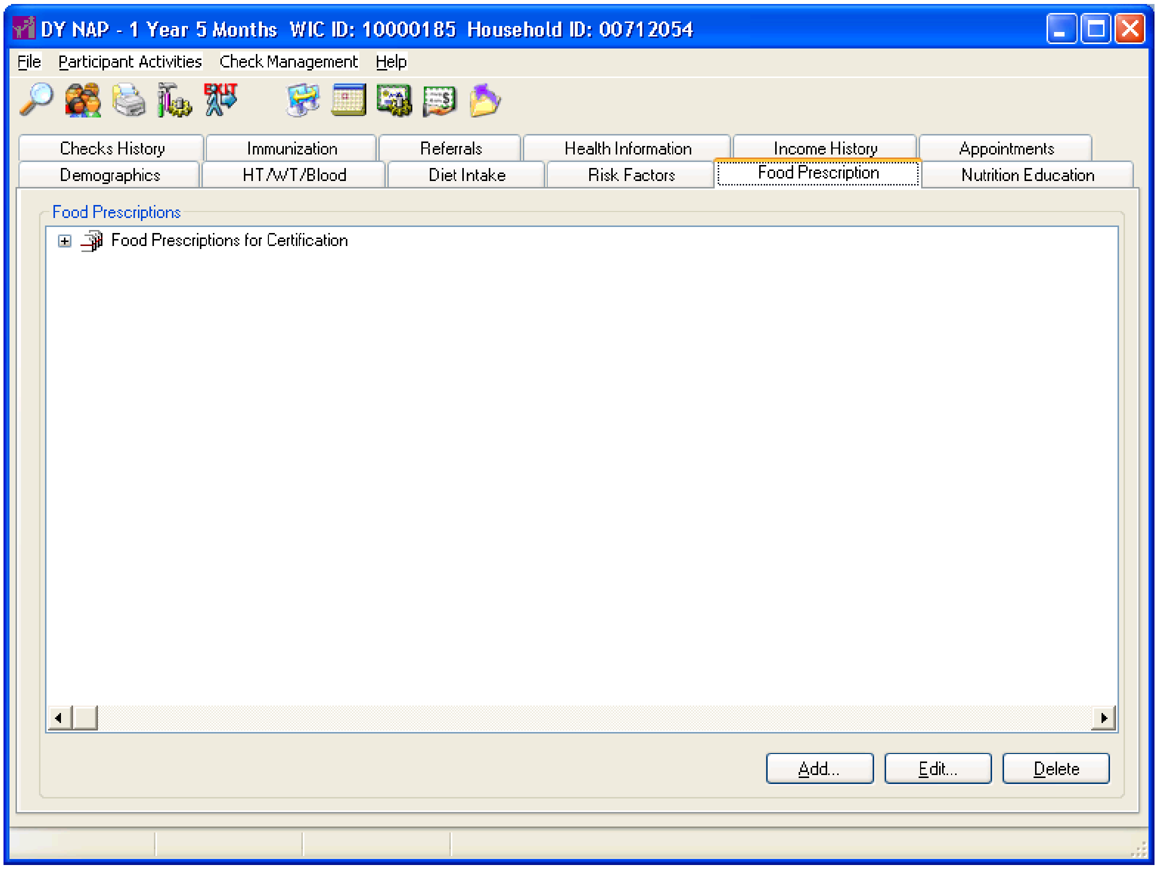



**Figure 12 - Food Prescription Tab**

### 9.11.1 Controls

The controls for the Food Prescription tab are defined in Common Interface Panels *Chapter L – Food Prescription*.

### 9.11.2 Processes

The system will verify if there is a certification in progress. If at least one certification is started and not completed, all controls on the Food Prescription Tab are locked. Modifying from the Food Prescription Tab is not allowed until the Certification has been completed. This will apply if a record exists for the selected StateWICID in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

### *9.12 Nutrition Education Tab*

The Nutrition Education tab of the Participant Folder allows the user to view previous nutrition education contacts with the participant, and add additional contacts if necessary. It is invoked when the user selects the Nutrition Education tab in the Participant Folder.

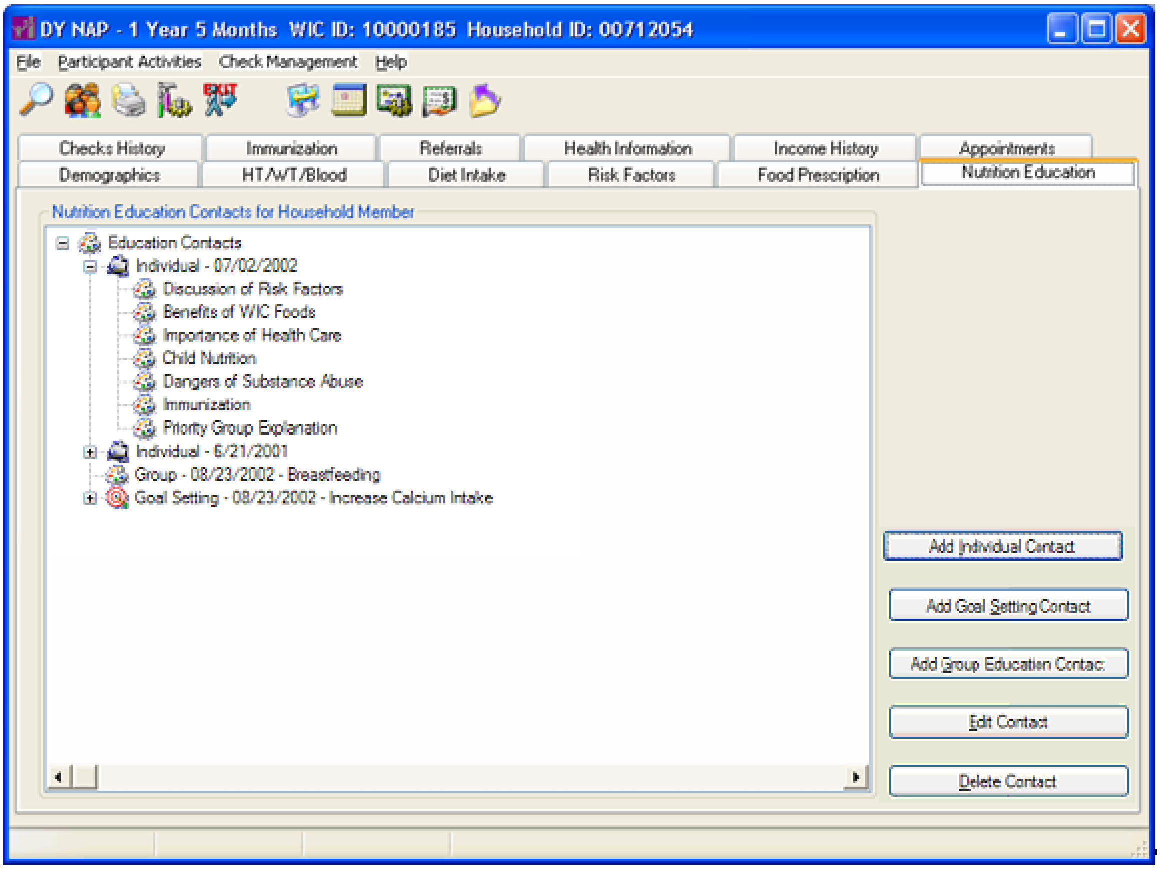



**Figure 13 - Nutrition Education Tab**

## 9.12.1 Controls

The controls and functionality for this panel are defined in Common Interface Panels *Chapter N – Nutrition Education and Goal Setting*.

### 9.12.2 Processes

The system will verify if there is a certification in progress. If at least one certification is started and not completed, all controls on the Nutrition Education Tab are locked. Modifying from the Nutrition Education Tab is not allowed until the Certification has been completed. This will apply if a record exists for the selected StateWICID in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

### *9.13 Checks History Tab*

The Checks History tab of the Participant Folder allows the user to view the checks issued to the participant at any Clinic affiliated with the local agency administrative server. Additionally, the user will be able to view the food items that display on the currently selected check. The Checks History tab is invoked when the user selects the Checks History tab in the Participant Folder.

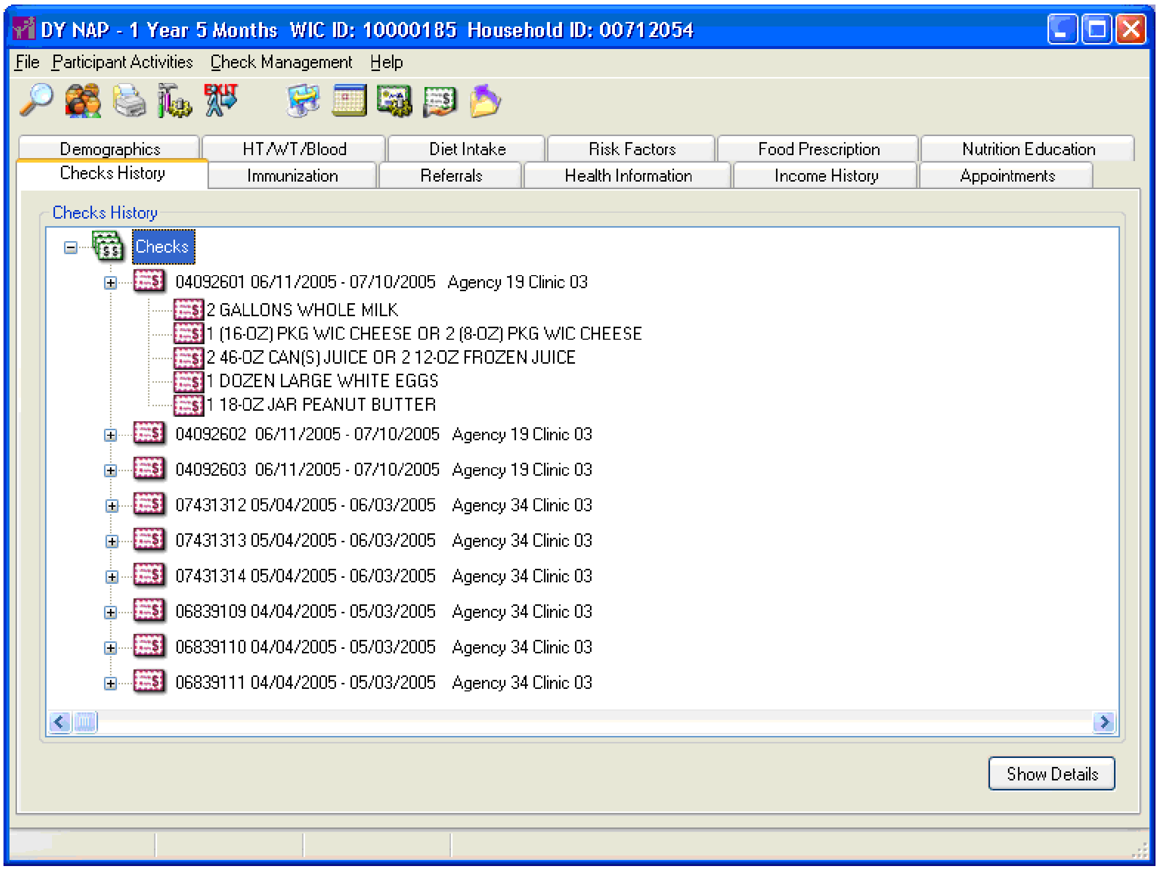



**Figure 14 - Checks History Tab**

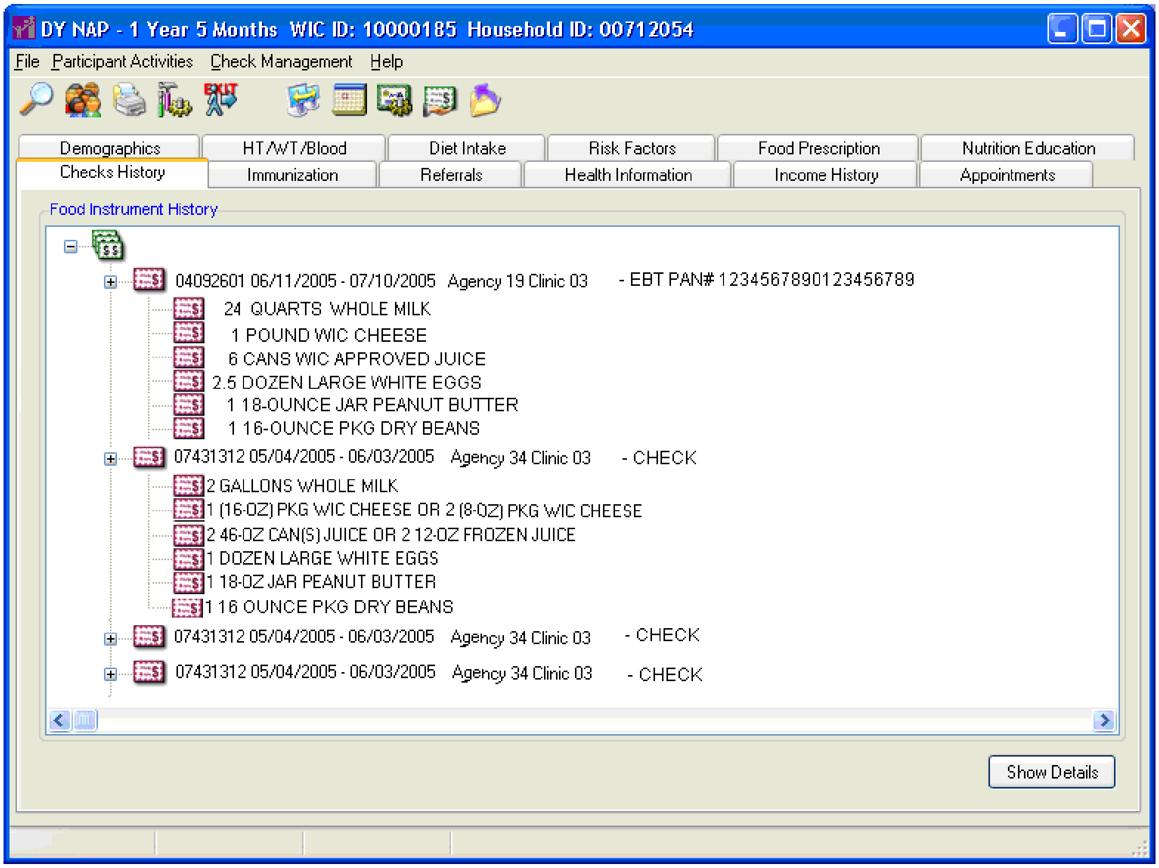



**Figure 15 - Checks History Tab- EBT Ready**

## 9.13.1 Controls

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

### *9.13.1.1 Checks Display Tree View*

This control allows the user to view checks for the participant along with the food items that comprise the food prescription on each check. The tree view will be enabled when the Checks History tab is active. It will consist of the following hierarchical structure:

Checks Root

|

|_ Check Node

| |

| |__Food Item

| |__Food Item

It will be filled with all checks issued for the participant. The checks will display in reverse chronological order according to the value of the First Date to Use. The most recent check will default to expanded. The data values on the tree view will be read-only.

### *9.13.1.2 Check Tree View Node*

This node of the Checks Display tree view allows the user to view the information on the issued check, the agency, and Clinic at which the check was issued. The node will consist of the chequ02E_new.gif icon and text in the format of {check number} {first date to use (MM/DD/CCYY)} - {last date to use (MM/DD/CCYY)} Agency {Agency ID} Clinic {Clinic ID}. If the check was voided, the node will have additional text in the format of VOIDED {voided date}. The check closest to the current system date (less than or equal to the current system date) will default to expanded. All other check nodes will be collapsed.

### *9.13.1.3 Food Item Tree View Node*

This node of the Checks Display tree view allows the user to view the food items that comprise the food prescription on a check. The node will consist of the chequ02E_new.gif icon and text in the format of {quantity of food item} {description of food item}.

### *9.13.1.4 Show Details Button*

The Show Details button will be enabled when the Checks History tab is active and a Check tree view node is selected in the Checks Display tree view. It has a mnemonic of "S".

### 9.13.2 Processes

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

#### *9.13.2.1 Initializing the Interface*

Check node - The node will consist of the chequ02E_new.gif icon and text in the format of {check number} {first date to use (MM/DD/CCYY)} - {last date to use (MM/DD/CCYY)} Agency {Agency ID} Clinic {Clinic ID}. If the check was voided, the node will have additional text in the format of VOIDED {voided date}.

Food Item node – The node will consist of the chequ02E_new.gif icon and text in the format of {quantity of food item} {description of food item}.

Upon initial presentation, the check closest to the current system date (less than or equal to the current system date) will default to expanded.

All remaining nodes will be initially collapsed.

#### *9.13.2.2 Edits*

There are no edits performed on the Checks History tab.

#### *9.13.2.3 Saving the Data*

There are no updateable controls on the Checks History tab; therefore, no data is written to the database.

#### *9.13.2.4 Show Check Details*

Upon selection of the Show Details button, the system will invoke the Check Details dialog described in this document.

## *9.14 Check Details*

The Check Details dialog allows the user to view the detail information about a check. It is invoked when the user selects the Show Details button on the Checks History tab.

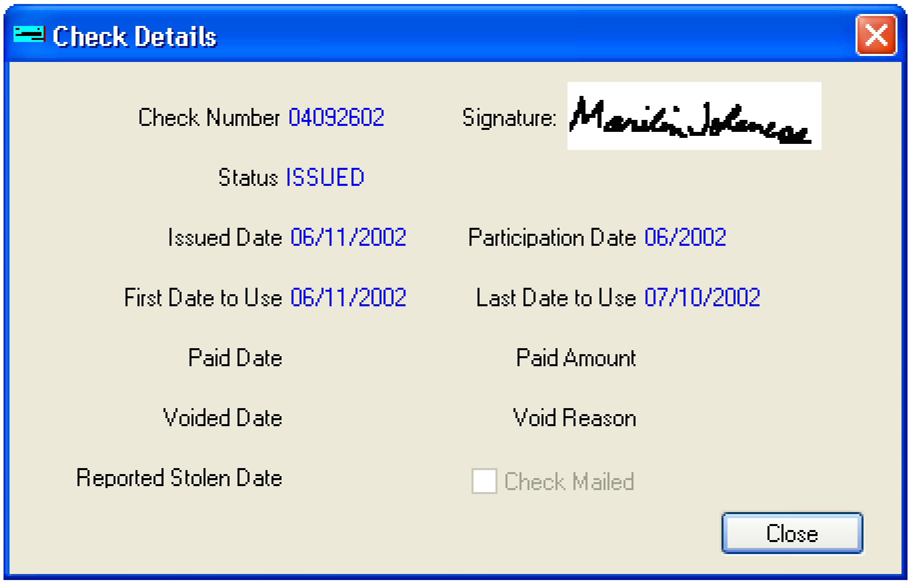



**Figure 16 - Check Details Dialog**

### 9.14.1 Controls

This section describes the behavior of the controls on the Check Details dialog.

#### *9.14.1.1 Check Number Text and Value Label*

This control allows the user to view the check number of the food instrument. The value label will be filled with the value of the Serial-No attribute of the FOOD-INSTRUMENT entity. It will display in the inverse color of the dialog.

#### *9.14.1.2 Electronic Signature Picture Box and Value Label*

This control allows the user to view the electronic signature for the participant as it was captured on the digital signature pad. The value in the control is read-only.

#### *9.14.1.3 Status Text and Value Label*

This control allows the user to view the current status of the check. The value label will be filled with one of the following values that represent the current status of the check:

- REDEEMED
- VOIDED
- STOLEN
- EXPIRED
- ISSUED

It will display in the inverse color of the dialog.

#### *9.14.1.4 Issued Date Text and Value Label*

This control allows the user to view the issued date of the check. The value label will be filled with the value of the Issued-Date attribute of the FOOD-INSTRUMENT-SET entity. It will display in the inverse color of the dialog. If the information is not currently available, the value label will be blank.

#### *9.14.1.5 Participation Date Text and Value Label*

This control allows the user to view the participation date of the check. The value label will be filled with the value of the Participation-Date attribute of the FOOD-INSTRUMENT-SET entity. It will display in the inverse color of the dialog. If the information is not currently available, the value label will be blank.

### *9.14.1.6 Expiration Date Text and Value Label*

This control allows the user to view the expiration date of the check. The value label will be filled with the value of the Expiration-Date attribute of the FOOD-INSTRUMENT entity. It will display in the inverse color of the dialog. If the information does not apply to the current status of the check, the value "N/A" will be displayed.

### *9.14.1.7 First Date to Use Text and Value Label*

This control allows the user to view the first date to use of the check. The value label will be filled with the value of the First-Use-Date attribute of the FOOD-INSTRUMENT-SET entity. It will display in the inverse color of the dialog. If the information is not currently available, the value label will be blank.

### *9.14.1.8 Last Date to Use Text and Value Label*

This control allows the user to view the last date to use of the check. The value label will be filled with the value of the Last-Use-Date attribute of the FOOD-INSTRUMENT-SET entity. It will display in the inverse color of the dialog. If the information is not currently available, the value label will be blank.

### *9.14.1.9 Paid Date Text and Value Label*

This control allows the user to view the paid date of the check. The value label will be filled with the value of the Paid-Date attribute of the FOOD-INSTRUMENT entity. It will display in the inverse color of the dialog. If the information does not apply to the current status of the check, the value "N/A" will be displayed.

### *9.14.1.10 Paid Amount Text and Value Label*

This control allows the user to view the paid amount of the check. The value label will be filled with the value of the Paid-Amt attribute of the FOOD-INSTRUMENT entity. It will display in the inverse color of the dialog. If the information applies to the current status of the check, the value will display in the "$#####.##" format. If the information does not apply to the current status of the check, the value "N/A" will be displayed.

### *9.14.1.11 Void Date Text and Value Label*

This control allows the user to view the date that the check was voided. The value label will be filled with the value of the Voided-Date attribute of the FOOD-INSTRUMENT entity. It will display in the inverse color of the dialog. If the information does not apply to the current status of the check, the value "N/A" will be displayed.

#### *9.14.1.12 Void Reason Text and Value Label*

This control allows the user to view the reason that the check was voided. The value will be populated from the appropriate value in the reference dictionary table of the lookup database for the Void-Reason attribute of the FOOD-INSTRUMENT entity. It will display in the inverse color of the dialog. If the information does not apply to the current status of the check, the value "N/A" will be displayed.

#### *9.14.1.13 Reported Stolen Date Text and Value Label*

This control allows the user to view the date that the check was reported as stolen. The value label will be filled with the value of the Reported-Stolen-Date attribute of the FOOD-INSTRUMENT entity. It will display in the inverse color of the dialog. If the information does not apply to the current status of the check, the value "N/A" will be displayed.

#### *9.14.1.14 Check Mailed Check Box*

This control indicates that the check was mailed to the participant. The check box will be disabled when the Check Details dialog is active.

#### *9.14.1.15 Close Button*

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

### 9.14.2 Processes

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

#### *9.14.2.1 Initializing the Interface*

Upon initial display, set the title bar text to "Check Details".

All fields display the information for the check selected on the Checks History Tab.

#### *9.14.2.2 Edits*

There are no edits defined for this dialog.

## *9.15 Immunizations Tab*

The Immunizations tab allows the user to view a listing of the immunizations that the participant has received. The user will be able to add immunization records to the Participant Folder, delete immunization records, or edit any immunization records entered by the WIC program. The Immunizations tab also allows the user to print a Vaccine Coverage Report defined in Common Interface Panels *Chapter I – Immunizations*. The Immunizations tab is invoked when the user selects the Immunizations tab in the Participant Folder.

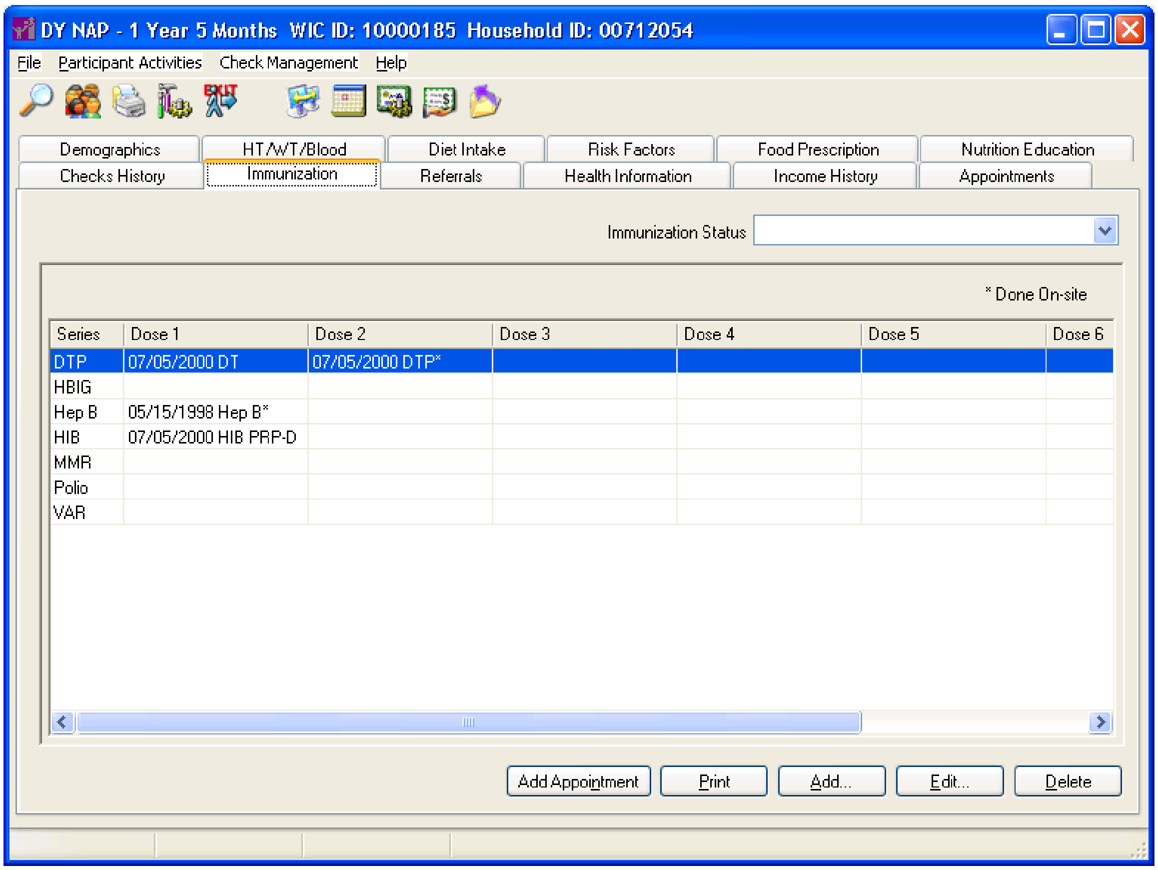



**Figure 17 - Immunizations Tab**

### 9.15.1 Controls

The controls for the Immunization tab are defined in Common Interface Panels *Chapter I - Immunizations*.

### 9.15.2 Processes

The system will verify if there is a certification in progress. If at least one certification is started and not completed, all controls **with the exception of the Print button** on the Immunizations Tab are locked. Modifying from the Immunizations Tab is not allowed until the Certification has been completed. This will apply if a record exists for the selected StateWICID in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

### *9.16 Referrals Tab*

The Referrals tab of the Participant Folder allows the user to view the previous referrals of the participant to agencies external to WIC and add new referrals. Additionally, the user may view and adjust the other programs in which the participant participates. The Referrals tab is invoked when the user selects the Referrals tab in the Participant Folder.

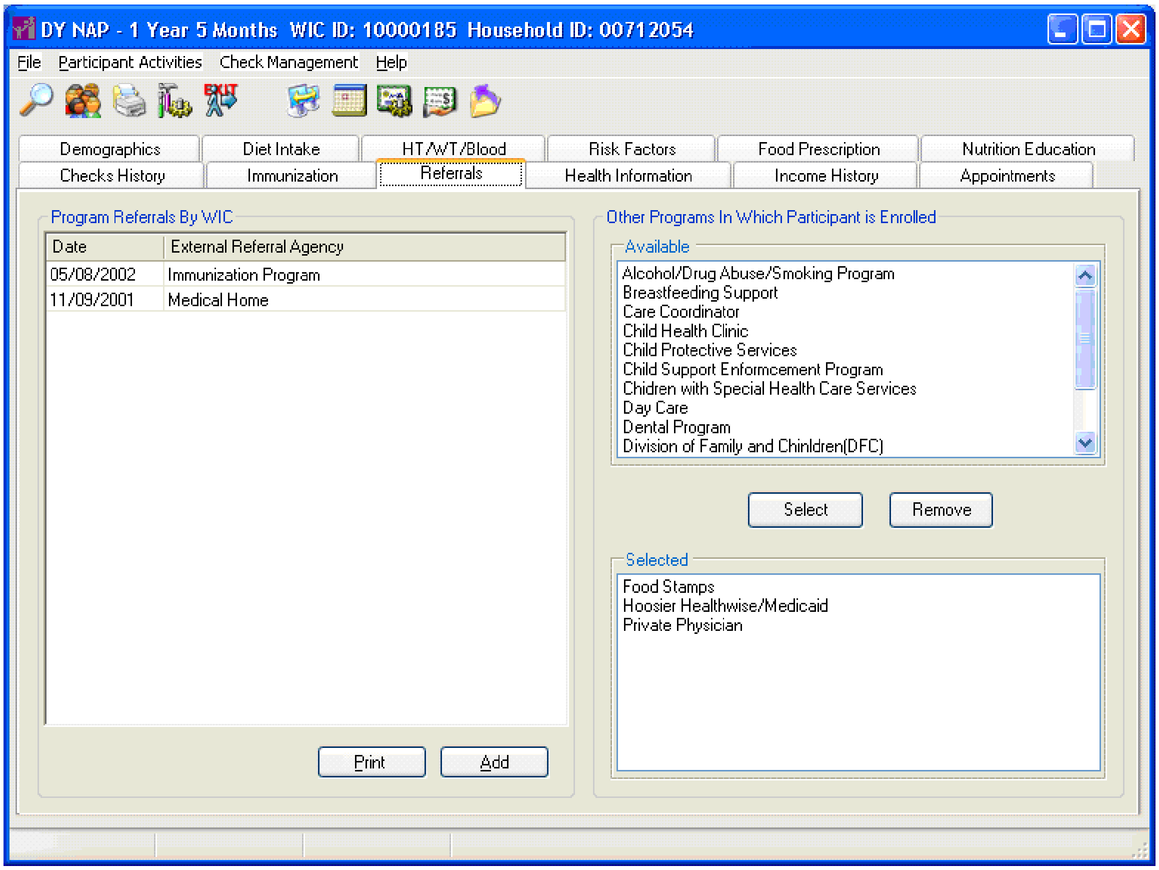



**Figure 18 - Referrals Tab**

## 9.16.1 Controls

The controls and functionality for this panel are defined in Common Interface Panels *Chapter M – Referrals*.

### 9.16.2 Processes

The system will verify if there is a certification in progress. If at least one certification is started and not completed, all controls on the Referrals Tab are locked. Modifying from the Referrals Tab is not allowed until the Certification has been completed. This will apply if a record exists for the selected StateWICID in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

## *9.17 Health Information Tab (Infant/Child)*

The Health Information tab will display Health Information specific to the WIC Category of the participant. The folder tab will load the panel and controls on this tab as defined in Common Interface Panels *Chapter E – Health Information*.

If the Health Information Tab is invoked in the Participant Folder and the participant being processed is an **infant** or a **child**, the following panel is loaded.

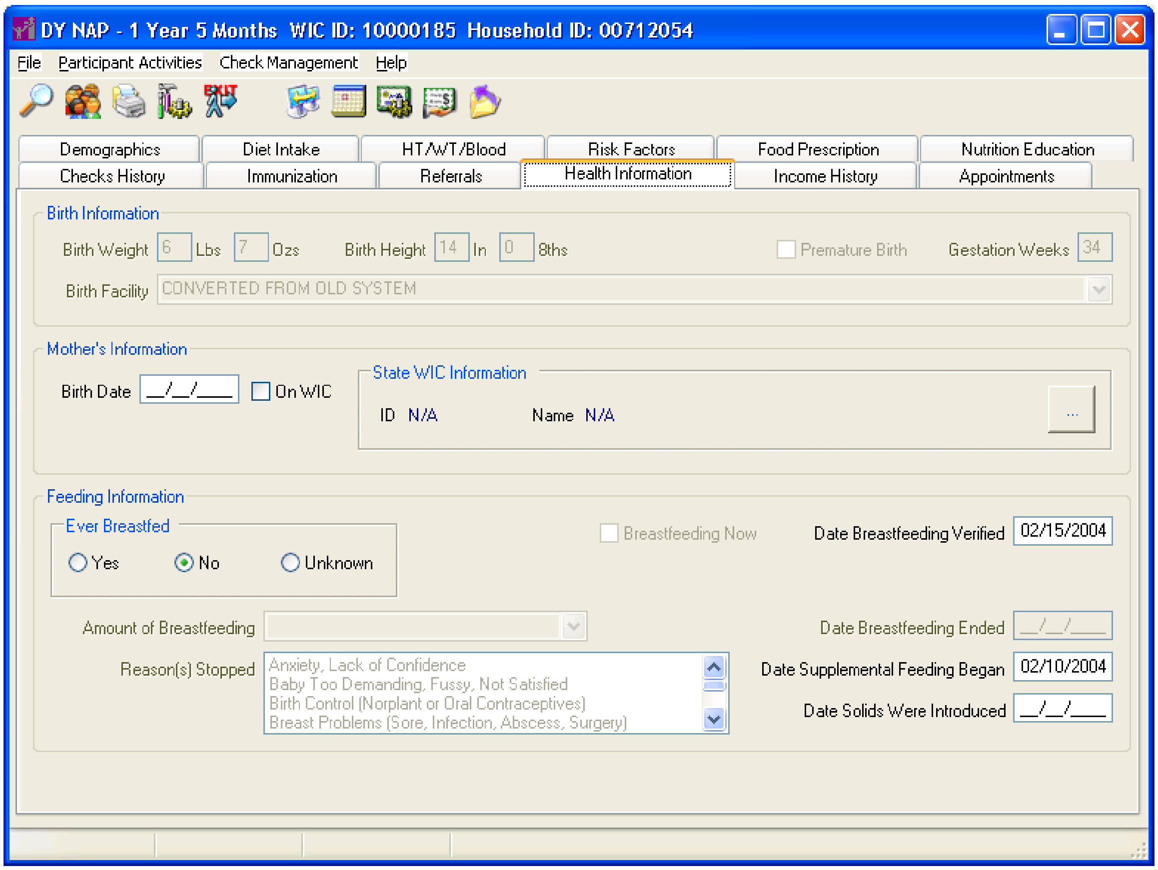



**Figure 19 - Health Information Tab (Infant/Child)**

### 9.17.1 Controls

The controls and functionality for this panel are defined in Common Interface Panels *Chapter E – Health Information* – Health Information (Infant, Child).

### 9.17.2 Processes

The system will verify if there is a certification in progress. If at least one certification is started and not completed, all controls on the Health Information Tab are locked. Modifying from the Health Information Tab is not allowed until the Certification has been completed. This will apply if a record exists for the selected StateWICID in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

### *9.18 Health Information Tab (Woman - Pregnancy Info Sub-tab)*

The Health Information tab will display Health Information specific to the WIC Category of the participant. The folder tab will load the panel and controls on this tab as defined in Common Interface Panels *Chapter E – Health Information*.

If the Health Information Tab is invoked in the Participant Folder and the participant being processed is a **pregnant** woman, the following panel is loaded.

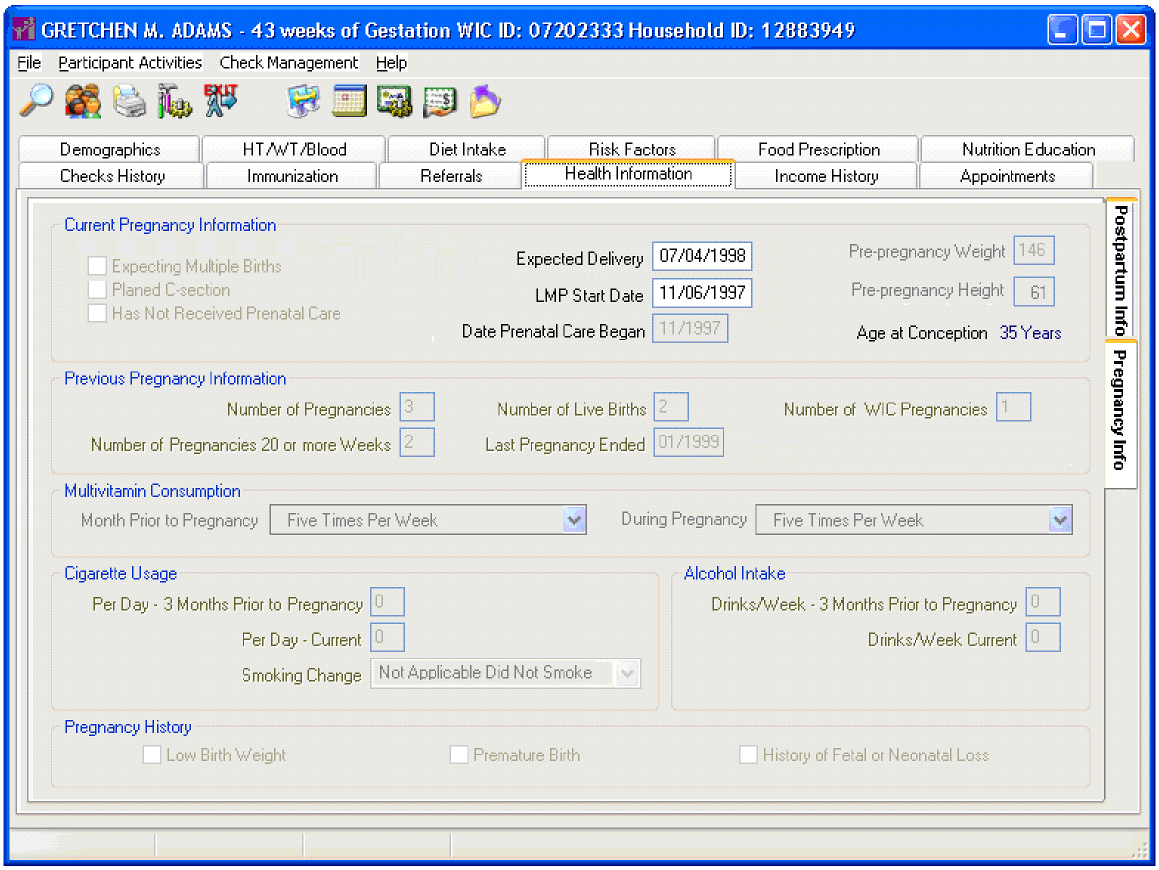



**Figure 20 - Health Information Tab (Woman - Pregnancy Info Sub-tab)**

#### 9.18.1 Controls

The controls and functionality for this panel are defined in Common Interface Panels *Chapter E – Health Information* – Health Information (Pregnancy)

### 9.18.2 Processes

The system will verify if there is a certification in progress. If at least one certification is started and not completed, all controls on the Health Information Tab are locked. Modifying from the Health Information Tab is not allowed until the Certification has been completed. This will apply if a record exists for the selected StateWICID in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

### *9.19 Health Information Tab (Woman - Postpartum Info Sub-tab)*

The Health Information tab will display Health Information specific to the WIC Category of the participant. The folder tab will load the panel and controls on this tab as defined in Common Interface Panels *Chapter E – Health Information*.

If the Health Information Tab is invoked in the Participant Folder and the participant being processed is a postpartum woman (**breastfeeding** or **non-breastfeeding**), the following panel is loaded.

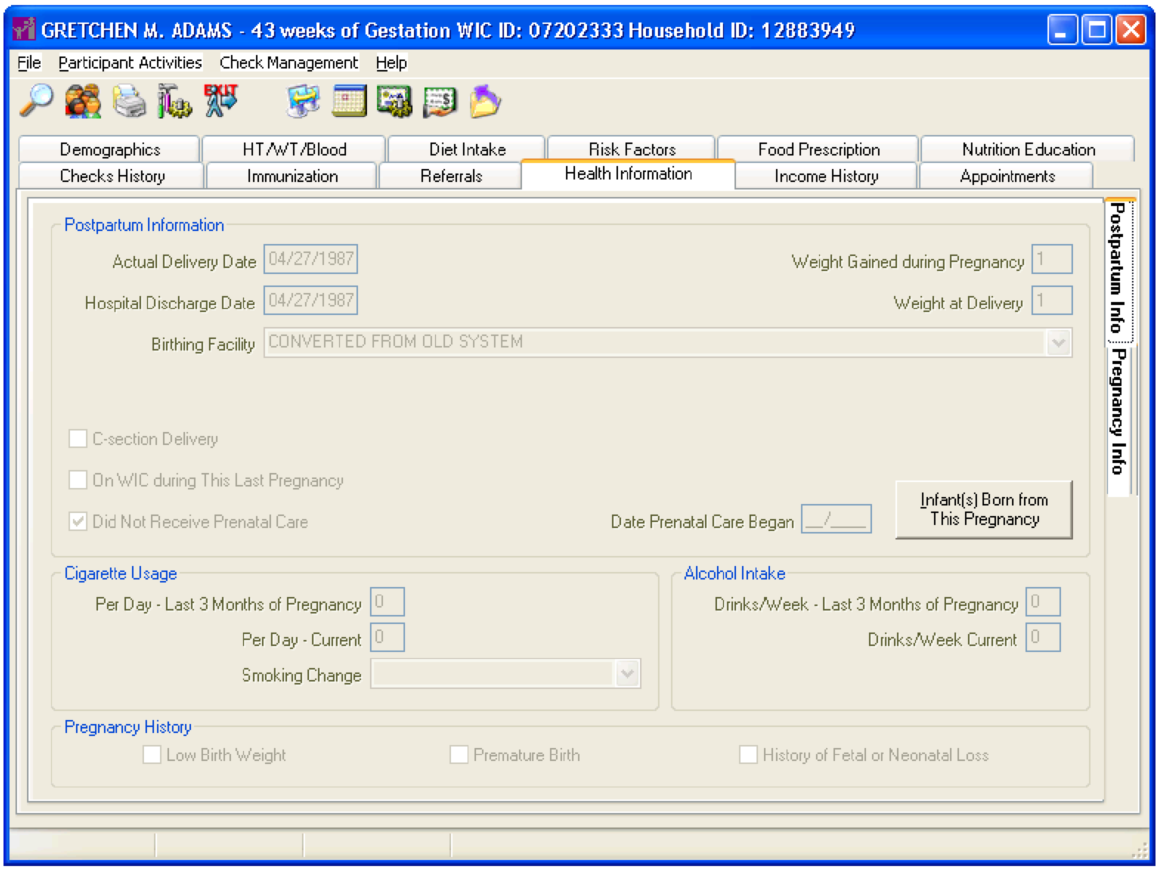



**Figure 21 - Health Information Tab (Woman - Postpartum Info Sub-tab)**

#### 9.19.1 Controls

The controls and functionality for this panel are defined in Common Interface Panels *Chapter E – Health Information* – Health Information (Postpartum)

### 9.19.2 Processes

The system will verify if there is a certification in progress. If at least one certification is started and not completed, all controls on the Health Information Tab are locked. Modifying from the Health Information Tab is not allowed until the Certification has been completed. This will apply if a record exists for the selected StateWICID in the CertContact entity and the CertContact.CertEndDate and CertContact.CertIneligibleDate are not valued.

### *9.20 Income History Tab*

The Income History tab of the Participant Folder allows the user to view previous income screening contact information for members of the household. It is invoked when the user selects the Income History tab in the Participant Folder.

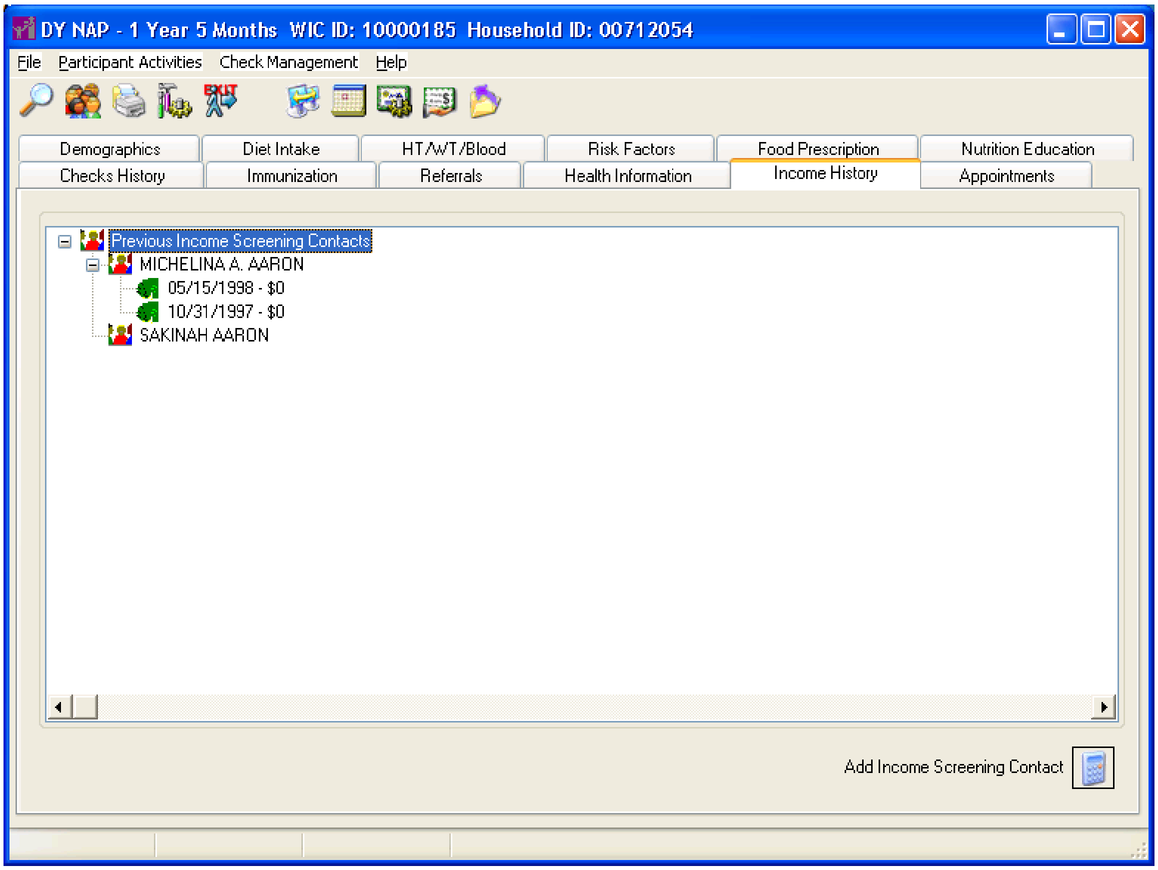



**Figure 22 - Income History Tab**

## 9.20.1 Controls

This section describes the behavior of the controls on the Income History tab.

### *9.20.1.1 Income Screening Contact Display Tree View*

The Income Screening Contact Display Tree View is enabled when the Income History tab is active. This control is defined in Common Interface Panels *Chapter D – Income Calculator –* Income Screening Contact Display Tree View.

#### *9.20.1.2 Add Income Screening Contact Button*

The Add Income Screening Contact button will be enabled when the Income History Tab is active. It will have a ToolTip text of "Income Calculator".

### 9.20.2 Processes

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

#### *9.20.2.1 Initializing the Interface*

In the first node - the system will load First Name Middle Initial Last Name in alphabetical order for all participants associated with the selected Household ID.

In the second node – they system will display all previous income screening Contact Date and calculated Monthly Income in reverse chronological order by Contact Date.

Upon initial presentation, the participant listed in the first node in the tree will be initially expanded.

All remaining nodes will be initially collapsed

#### *9.20.2.2 Edits*

Upon selection of the Add Income Screening Contact button, if the user does not have the appropriate permissions (Income History.Add or FullControl), the system will invoke a standard error message with the text "You do not have the necessary permissions to add an income screening contact. Please see the supervisor."

#### *9.20.2.3 Add Income Screening Contact*

Upon selection of the Add Income Screening Contact button, the system will invoke the Income Calculator Dialog – defined in Common Interface Panels *Chapter D – Income Calculator*.

#### *9.20.2.4 Saving the Data*

There are no updateable controls on the Income History tab; therefore no data is written to the database.

## *9.21 Appointments Tab*

The Appointments tab of the Participant Folder allows the user to view appointments scheduled for all members of a household. The Appointments tab is invoked when the user selects the Appointments tab in the Participant Folder.

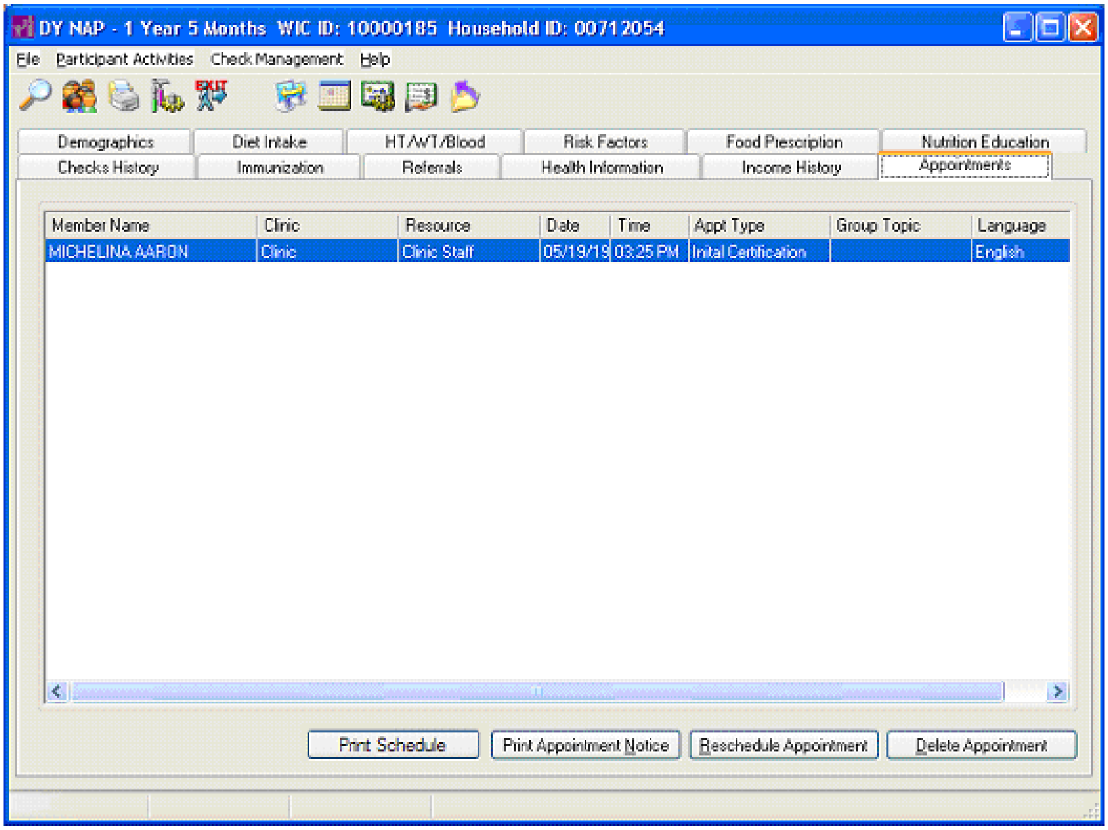



**Figure 23 – Appointments Tab**

### 9.21.1 Controls

The controls on the Appointments tab are described in Clinic *Chapter 08 - Appointment Scheduling* - Appointments Tab.

### 9.21.2 Processes

The processes on the Appointments tab are described in Clinic *Chapter 08 - Appointment Scheduling* - Appointments Tab.

### *9.22 Assign Risk Factors (Process)*

This process determines if the participant qualifies for additional system-assigned risk factors based upon the entered data. The process will not remove a system-assigned risk factor that was previously assigned to their certification. It is invoked in response to the following user actions:

- Leaving the Demographics sub-tab of the Demographics tab and initiating the process for the tab, as described in Common Interface Panels - *Chapter A – Demographic Information Panels*.
- Leaving the Additional Info 1 sub-tab of the Demographics tab and initiating the process for the tab, as described in Common Interface Panels - *Chapter A – Demographic Information Panels*.
- Leaving the Additional Info 2 sub-tab of the Demographics tab and initiating the process for the tab, as described in Common Interface Panels - *Chapter A – Demographic Information Panels*.
- Selection of the OK button on the Height/Weight Measurement Entry dialog, as described in Common Interface Panels - *Chapter G - Height Weight Bloodwork*.
- Selection of the OK button on the Blood Measurement Entry dialog, as described in Common Interface Panels - *Chapter G - Height Weight Bloodwork*.
- Selection of the OK button on the Add VENA Information dialog, as described in Common Interface Panels - *Chapter T - VENA*

When the Assign Risk Factors process is invoked the system will perform the following steps:

- Determine all of the system-assigned risk factors that are currently active (where the current system date falls within their active and inactive dates, inclusive).
- Determine all of the system-assigned risk factors that should be assigned to the participant based upon their current information.
- Compare the list of system-assigned risk factors to the risk factors on their current certification and identify any risk factors that should be added.
- If any system-assigned risk factors should be added then determine if the participant is already categorized as High Risk. If not, then determine if they should now be categorized as High Risk due to the additional risk factors.
- If any system-assigned risk factors should be added then determine if the certification priority of the participant should be increased due to the additional risk factors.

- Check if a certification record already exists for the participant with a start date that is equal to the current system date. If the record exists then update its list of risk factors with the additional system-assigned risk factors. If the participant should be categorized as High Risk due to the additional risk factors then update the participant's information to indicate this. If the priority of the participant should be increased due to the additional risk factors then update the priority on the existing certification record.
- If a certification record does not exist with a start date equal to the current system date then create a new certification record for the participant with the list of risk factors from their current certification record plus the additional system-assigned risk factors. The new certification will have the same end date as the current certification, and the current system date will be used as both the start and effective dates. Then update the current certification record so its end date is the current system date (certifications cannot overlap dates). Also update the participant's information with the start date of the new certification record. If the participant should be categorized as High Risk due to the additional risk factors then update the participant's information to indicate this. If the priority of the participant should be increased due to the additional risk factors then use the higher priority on the new certification record.

### *9.23 Certification Risk Factors*

The Certification Risk Factors dialog allows the user to view the risk factors that are assigned to the current certification and add risk factors that are available or remove the risk factors that were previously assigned by the system. It is invoked when the user selects the Assign Risk Factors menu item described in this document.

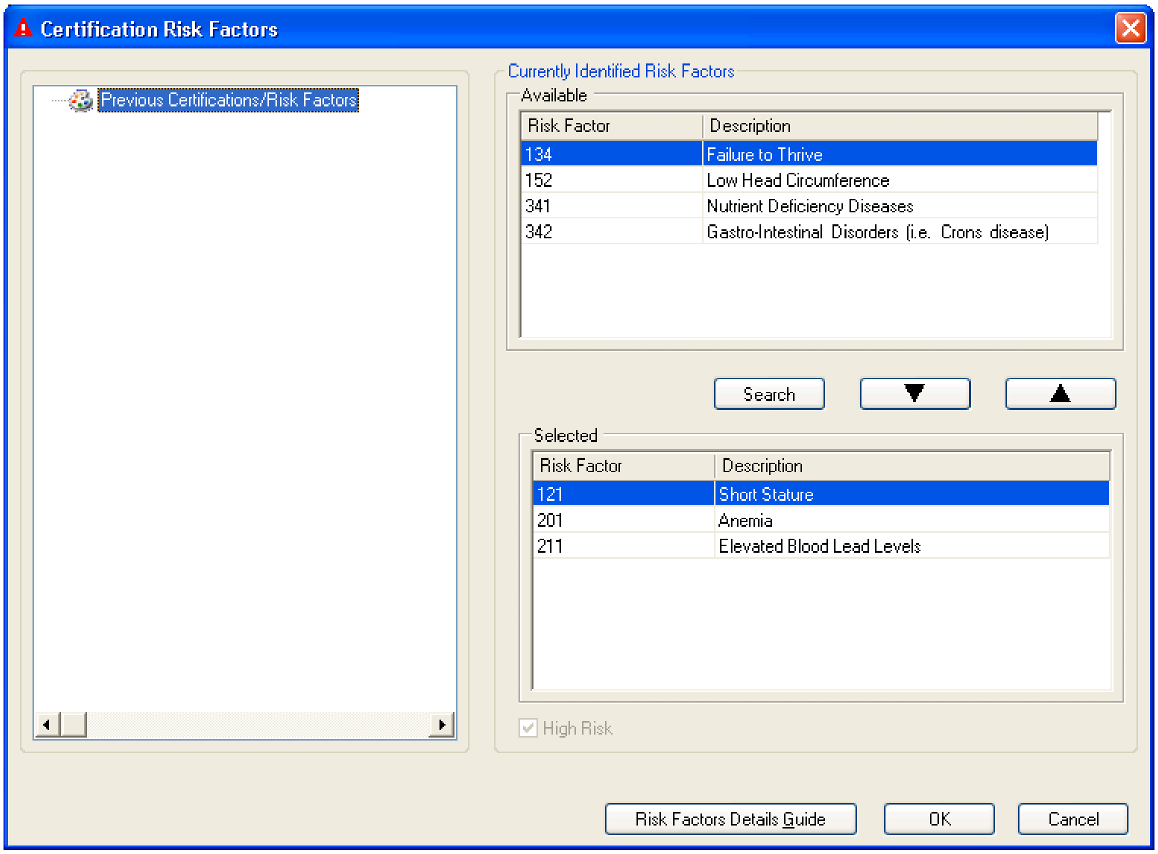



**Figure 24 - Certification Risk Factors Dialog**

## 9.23.1 Controls

### *9.23.1.1 Available Risk Factors Display Grid (Available)*

This control allows the user to view the CPA-determined risk factors that are active and available but have not been selected. It also allows the user to view the risk factors that can be assigned by either the CPA or the system but have not been assigned to the current certification attempt. The display grid will be enabled when the Certification Risk Factors dialog is active. It will consist of the following columns:

- Risk Factor

- Description

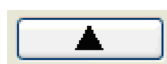
An entry will be added to the grid for each CPA-determined risk factor that is active (where the current system date falls within the active and inactive dates, inclusive), available for the WIC Category of the participant, and has not been assigned to the current certification attempt. An entry will also be added to the grid for each risk factor that can be assigned by either the CPA or the system that is active but has not been assigned to the current certification attempt. A risk factor is only shown in one list on the form and will never be shown in both grid lists. The values on the grid are read-only.

#### *9.23.1.2 Search Button*

This control allows the user to search for a risk factor in the Available Risk Factors display grid. The Search button will be enabled when the Certification Risk Factors dialog is active. It has a mnemonic of “S”.

#### *9.23.1.3 Select Button* 

This control allows the user to add the currently selected risk factor from the Available Risk Factors display grid to the Selected Risk Factors display grid. The Select button will be enabled when an entry is selected in the Available Risk Factors display grid. It has no mnemonic and does not have a shortcut key.

#### *9.23.1.4 Remove Button* 

This control allows the user to remove the currently selected risk factor in the Selected Risk Factors display grid and place it back in the Available Risk Factors display grid. The Remove button will be enabled when an entry is selected in the Selected Risk Factors display grid that has been added by a CPA. The Remove button will be disabled when an entry is selected in the Selected Risk Factors display grid that was added by the system based upon the participant information. It has no mnemonic and does not have a shortcut key.

#### *9.23.1.5 Selected Risk Factors Display Grid (Selected)*

This control allows the user to view the risk factors that have been selected for the current certification attempt. The display grid will be enabled when the Certification Risk Factors dialog is active. It will consist of the following columns:

- Risk Factor
- Description

An entry will be added to the grid for each risk factor (system-determined and CPA-determined) assigned to the current certification attempt. A risk factor is only shown in one list on the form and will never be shown in both grid lists. The values on the grid are read-only.

#### *9.23.1.6 High Risk Check Box*

This control allows the user to indicate that the participant is considered to be high risk. The check box will be marked and disabled when a risk factor in the Selected Risk Factors display grid indicates high risk. The check box will be enabled and unchecked when there are no risk factors in the Selected Risk Factors display grid that indicate high risk.

#### *9.23.1.7 Risk Factors Detail Guide Button*

This control allows the user to view the Risk Factors Detail Guide section of the on-line help function. The Risk Factors Detail Guide button will be enabled when the Certification Risk Factors dialog is active. It has a mnemonic of "G".

#### *9.23.1.8 OK Button*

The OK button will be enabled when the Certification Risk Factors dialog is active. (See the *Edits* and *Saving the Data* in the Processing section below) Characteristics for the OK button are defined in *Consistencies*.

#### *9.23.1.9 Cancel Button*

The Cancel button will be enabled when the Certification Risk Factors dialog is active. (See *Cancel* in the Processing section below). Characteristics for the Cancel button are defined in *Consistencies*.

### 9.23.2 Processes

This section describes the processes (navigation) that takes place as a result of the actions taken on the Certification Risk Factors dialog.

#### *9.23.2.1 Initializing the Interface*

Upon initial display of the dialog, the title bar text will be set to "Certification Risk Factors".

An entry will be added to the Available Risk Factors grid for each CPA-determined risk factor available for the WIC Category of the participant that has not been assigned to the current certification attempt. An entry will also be added to the grid for each risk factor that can be assigned by either the CPA or the system but has not been assigned to the current certification attempt.

An entry will be added to the Selected Risk Factors grid for each risk factor (system-determined and CPA-determined) assigned to the current certification attempt.

The High Risk check will be marked and disabled when a risk factor in the Selected Risk Factors display grid indicates high risk. The check box will be enabled and unchecked when there are no risk factors in the Selected Risk Factors display grid that indicate high risk.

### *9.23.2.2 Search*

Upon selection of the Search button the system will invoke the Risk Factor Search dialog described in this document.

### *9.23.2.3 Select Risk Factor*

Upon selection of the Select button, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Risk Factor.Add or FullControl) to add risk factors, the system will invoke a standard error message with the text "You do not have the necessary permissions to Update Risk Factors /High Risk. Please see the supervisor."

The system will remove the selected risk factor from the Available Grid and add it the Selected Grid.

### *9.23.2.4 Remove Risk Factor*

Upon selection of the button, the system will check the permissions of the currently logged-on user. If the user does not have appropriate permissions (Risk Factor.FullControl) to remove risk factors, the system will invoke a standard error message with the text "You do not have the rights to do the operation."

If the user has permissions, the system will remove the selected risk factor from the Selected Risk Factor grid add it back to the Available Risk Factor grid.

### *9.23.2.5 Saving the Data*

Upon selection of the OK button:

The system will save the values to the database as defined in the Data Map below

The system will determine if a certification record already exists for the participant with a start date that is equal to the current system date.

If a certification record does not exist with a start date equal to the current system date, the system will create a new certification record for the participant with the new list of risk factors. The new certification will have the same end date as the current certification, and the current system date will be used as both the start and effective dates. The system will update the current certification record so its end date is the current system date (certifications cannot overlap dates). The system will also update the participant's information with the start date of the new certification record. If the participant should be categorized as High Risk due to the new risk factors then the system will also update the participant's information to indicate this. If the priority of the participant should be increased due to the new risk factors then the system will use the higher priority on the new certification record.

If the record exists then the system will replace its list of risk factors with the new list. If the participant should be categorized as High Risk due to the new risk factors then the system will update the participant's information to indicate this. If the priority of the participant should be increased then the system will update the priority on the existing certification record.

The system will dismiss the Certification Risk Factor dialog and return the user to the Certification Guided Script window.

### *9.23.2.6 Display Risk Factors Details Guide*

Upon selection of the Risk Factors Detail Guide button, the system will invoke the on-line help facility with the Risk Factors Details Guide.

### *9.23.2.7 Data Map*

| **Control Label** | **Entity** | **Attribute** | **Business Rule** |
|---|---|---|---|
| Selected List | RiskFactor | RiskFactorID | |
| | RiskFactor | CreateUser | |
| | RiskFactor | CreateDate | |
| | RiskFactor | CreateTime | |

A risk factor is added to the Risk Factor table for each one selected. If a high-risk risk factor is selected or the user to indicate that the participant is considered to be high risk then the Member table will have its HighRisk attribute updated.

## *9.24 Risk Factor Search*

The Risk Factor Search dialog allows the user to search for a risk factor in the Available Risk Factors display grid on the Certification Risk Factors dialog. It is invoked when the user selects the Search button on the Certification Risk Factors dialog.

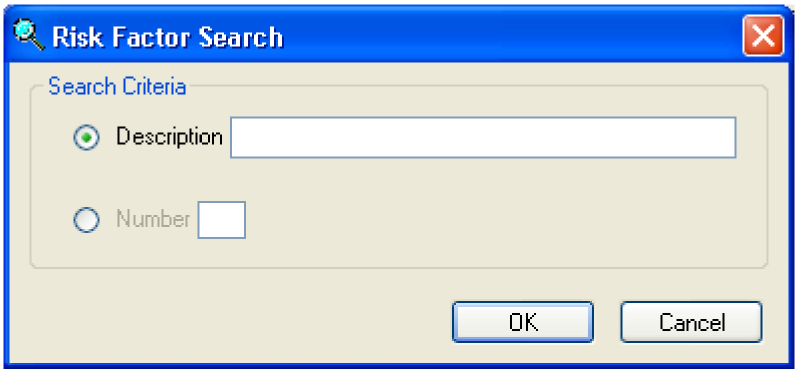



**Figure 25 - Risk Factor Search Dialog**

### 9.24.1 Controls

This section describes the behavior of the controls on the Risk Factor Search dialog.

#### *9.24.1.1 Description Radio Button and Text Box*

The Description text box is enabled when the Description radio button is selected. It is disabled when the Number radio button is selected. It will allow a maximum of 60 alphanumeric characters.

#### *9.24.1.2 Number Radio Button and Masked Edit Box*

The Number masked edit box is enabled when the Number radio button is selected.. It is disabled when the Description radio button is selected. The masked edit box will only allow entry of numeric characters. The mask for the box will be "###". If less than the maximum number of digits is entered into the masked edit box, it will be padded with preceding zeros.

#### *9.24.1.3 OK Button*

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

#### *9.24.1.4 Cancel Button*

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

### 9.24.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Risk Factor Search dialog.

#### *9.24.2.1 Initializing the Interface*

Upon initial display of the dialog, the title bar text will be set to "Risk Factor Search"

The Description radio button will initially be selected.

The Description text box will default to blank.

#### *9.24.2.2 Edits*

Upon selection of the OK button, if the Description radio button is selected and an entry has not been made in the Risk Factor Description text box the system will invoke a standard error message the message text "An entry is required for the <control label>."

If the Number radio button is selected and an entry has not been made in the Number masked edit box the system will invoke a standard message with the text "An entry is required in the <control label>."

#### *9.24.2.3 Perform Description Search*

Upon successful completion of the above-listed edits and the Description radio button is selected, he system will provide a *soft search* for a risk factor in the Available Risk Factors Display Grid (Available) that matches up to the number of characters entered in the Risk Factor Description text box. For example, a soft search for "Ce" would find the first risk factor that contains the letters "Ce" anywhere in its description. The *soft search* is not case sensitive.

If a matching risk factor is found the system will display the Risk Factors/High Risk dialog with the Available Risk Factors Display Grid (Available) positioned to that risk factor.

If a matching risk factor is not found the system will invoke a standard warning message with the text "No risk factors match the entered criteria." Upon dismissing the warning message the system will return to the Risk Factor Search dialog.

### *9.24.2.4 Perform Number Search*

Upon successful completion of the above-listed edits and the Number radio button is selected, the system will search for a risk factor in the Available Risk Factors Display Grid (Available) that matches the number entered in the Number masked edit box.

If a matching risk factor is found the system will display the Risk Factors/High Risk dialog with the Available Risk Factors Display Grid (Available) positioned to that risk factor.

If a matching risk factor is not found the system will invoke a standard warning message with the text “No risk factors match the entered criteria.” Upon dismissing the warning message the system will return to the Risk Factor Search dialog.

### *9.24.2.5 Cancel*

Upon selection of the Cancel button, the system will dismiss the Risk Factor Search dialog and return to the calling window.

### *9.25 CPA Review*

The CPA Review dialog notifies the user that the participant should be seen by a CPA and allows the user to view the reasons why a CPA Review alert exists for the participant. The dialog is automatically invoked by the system in response to the following user actions when a CPA Review alert exists for the participant:

- Opening a Participant Folder
- Marking a participant as On-site as described in Clinic *Chapter 06 - Search-Selection*

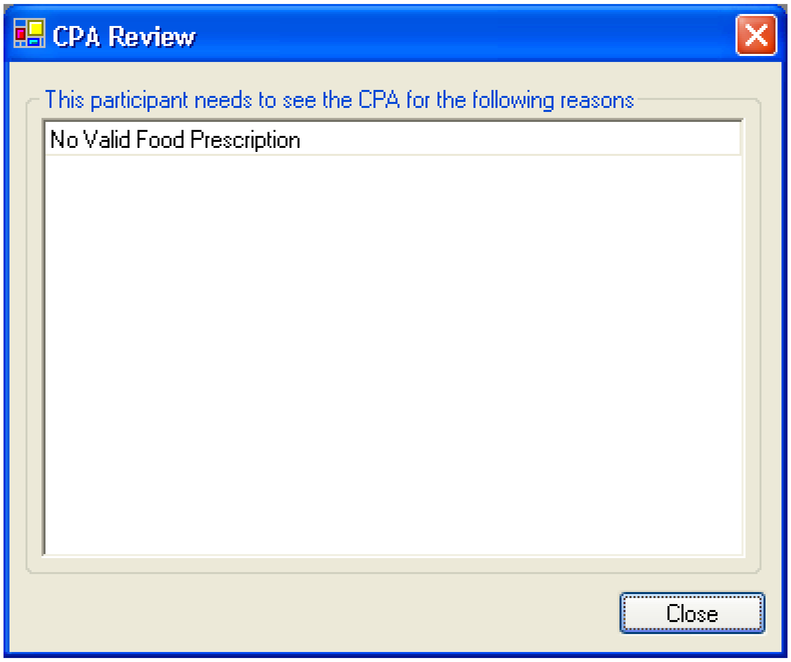



**Figure 26 - CPA Review**

#### 9.25.1 Controls

The CPA Review dialog is described in Common Interface Panels *Chapter F – CPA Review*.

#### 9.25.2 Processes

No additional processes are defined for this dialog.

## *9.26 VOC Certification*

The VOC Certification Dialog allows the user to immediately certify a participant based on a valid VOC document from another State. It is invoked when the user selects the VOC Certification menu item from the Participant Folder menu as described in this document.

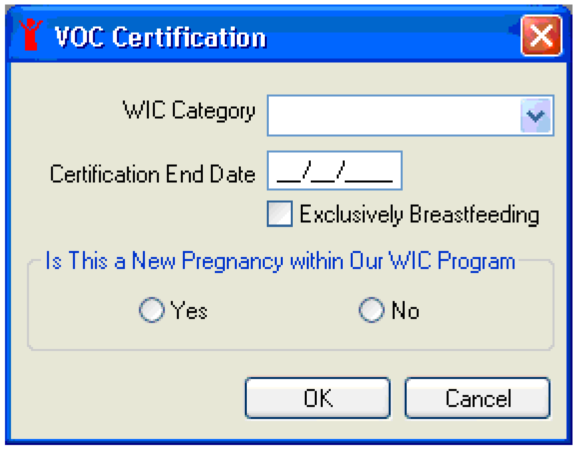



**Figure 27 – VOC Certification Dialog**

### 9.26.1 Controls

This section describes the behavior of the controls on the VOC Certification Dialog.

#### *9.26.1.1 WIC Category Dropdown*

This control allows the user to select the WIC Category of the applicant. The Dropdown will be enabled when the VOC Certification Dialog is active. The Dropdown will contain a list of valid WIC Categories from the reference dictionary table of the lookup database. The control will initially be blank.

If the value selected in the Dropdown is Breastfeeding, the Exclusively Breastfeeding check box will be enabled; otherwise, the Exclusively Breastfeeding check box will be disabled.

#### *9.26.1.2 Certification End Date Masked Edit Box*

This control allows the user to enter the certification ending date for the participant from their VOC document. The masked edit box will be enabled when the VOC Certification Dialog is active. It will only allow the entry of numeric characters. The mask for the box will be "##/##/####" to accept a date with a four digit year. The masked edit box will initially be blank.

#### *9.26.1.3 Exclusively Breastfeeding Check Box*

This control allows the user to indicate that a breastfeeding woman is Exclusively Breastfeeding her infant. The check box will be enabled when the VOC Certification Dialog is active and the value of the WIC Category Dropdown is Breastfeeding. It has an initial value of cleared.

#### *9.26.1.4 Is This a New Pregnancy within Our WIC Program Radio Button Group*

This group of controls allows the user to select whether this is a new pregnancy or an existing pregnancy. The radio button group will be enabled when the VOC Certification Dialog is active and the value of the WIC Category Dropdown is Pregnant, Breastfeeding, or Non-breastfeeding. It will consist of the following radio buttons:

- Yes
- No

Neither radio button will initially be selected.

#### *9.26.1.5 OK Button*

The OK button will be enabled when the VOC Certification Dialog is active. (See *Saving the Data* in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

#### *9.26.1.6 Cancel Button*

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

### 9.26.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the VOC Certification Dialog.

#### *9.26.2.1 Initializing the Interface*

Upon initial presentation of the dialog, the title bar text will be set to "VOC Certification"

The following controls will be initially blank

- WIC Category dropdown
- Certification End Date masked edit box
- Exclusively Breastfeeding check box
- Is This a New Pregnancy within Our WIC Program radio button group

The following controls are initially disabled

- Exclusively Breastfeeding check box
- Is This a New Pregnancy within Our WIC Program radio button group

#### *9.26.2.2 Edit for Required Entry in Controls*

Upon selection of the OK button, the system will check that values have been entered in the following controls:

- WIC Category Dropdown
- Certification End Date masked edit box

If an entry is not made in an above-listed control, 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, the system will invoke a standard error message with the text "Invalid date entered."

Upon successful completion of the above-listed edits, the system will check that the values entered into the controls are considered legitimate as follows:

The specified WIC Category must be applicable to the gender of the participant, according to the following table:

| **Gender** | **Acceptable WIC Category** |
|---|---|
| Male | Infant, Child |
| Female | Infant, Child, Pregnant, Breastfeeding, Non-breastfeeding |

If the WIC Category does not correspond to the date of birth of the participant the system will invoke a standard error message with the text "WIC Category is not valid for client's date of birth (##/##/####)."

Upon successful completion of the above-listed edits, the system will perform the following cross-edits:

The date value entered in the Certification End Date masked edit box must fall within the acceptable range for the selected WIC Category, according to the following table:

| WIC Category | Minimum Date | Maximum Date |
|---|---|---|
| Infant | current system date | Value defined by business rule 'DAYSVOCVALID_I' |
| Child | current system date | Value defined by business rule 'DAYSVOCVALID_C' |
| Pregnant | current system date | Value defined by business rule 'DAYSVOCVALID_P' |
| Breastfeeding | current system date | Value defined by business rule 'DAYSVOCVALID_B' |
| Non-breastfeeding | current system date | Value defined by business rule 'DAYSVOCVALID_P' |

The Certification End Date masked edit box must fall between the current system date and the calculated date using the value specified in the business rule for the WIC Category, inclusive. If an invalid date is entered, the system will invoke a standard error message with the text "The certification end date is not valid. It can be no earlier than the current system date and no later than {MAX_CERT_MONTHS_B business rule value} days in the future."

If the value of the WIC Category Dropdown is Pregnant, Breastfeeding, or Non-breastfeeding then a selection is required in the Is This a New Pregnancy within Our WIC Program radio button group. If a selection is not made, the system will invoke a standard message with the message text, "Please select either the Yes or No radio button to indicate if this is a new pregnancy."

### *9.26.2.3 Saving the Data (Certify Participant)*

Upon successful completion of the above-listed edits, the system will create a new certification with the information entered on this dialog.

If the participant was already in a valid certification, the system will terminate that certification with the reason “VOC Subsequent Certification” and will use the current system date as the terminated date. The system will also replace the end date of this certification with the current system date to prevent an overlap with the new VOC certification.

If the Exclusively Breastfeeding check box is un-marked and the **Yes** radio button for Is This a New Pregnancy within Our WIC Program is marked the system will create a new certification record. A new pregnancy record will be created for the participant if the WIC category is pregnant. A new postpartum record will be created for the participant if the WIC category is breastfeeding or non-breastfeeding.

If the Exclusively Breastfeeding check box is un-marked and the **No** radio button for Is This a New Pregnancy within Our WIC Program is marked the system will link the current pregnancy record to the new certification record that is created for the participant if the WIC category is pregnant.

Or, the system will create a new postpartum record for the new certification record that is created for the participant if the previous certification was for a pregnancy and the selected WIC category is breastfeeding or non-breastfeeding. Or, the system will link the current postpartum record to the new certification record that is created for the participant if the WIC category is breastfeeding or non-breastfeeding. A new postpartum record will be linked to the previous pregnancy if the expected delivery date and the actual delivery date are within 6 weeks.

If the Exclusively Breastfeeding check box is marked and the **Yes** radio button for Is This a New Pregnancy within Our WIC Program is marked the system will create a new certification record. The new certification record will then be linked to a new postpartum record and a new ‘place holder’ record in the postpartum infant table for the participant is created. This will allow the woman to receive the Exclusively-Breastfeeding food prescription items. The new postpartum record will be linked to the previous pregnancy if the previous pregnancy expected delivery date and the postpartum actual delivery date are within 6 weeks.

If the Exclusively Breastfeeding check box is marked and the **No** radio button for Is This a New Pregnancy within Our WIC Program is marked the system will do the following:

- The system will create a new certification record for the participant.
- The system will then verify that the actual delivery date on the most current postpartum record is less than one year from the current system date.

- If the actual delivery date is **less** than one year the system will link the most current postpartum record to the new certification. The system will then verify that a postpartum infant record is linked to the postpartum record. If there is not a postpartum infant record linked to the postpartum, the system will create one and link it to the postpartum.
- If the actual delivery date is **greater** than or equal to one year from the current system date or the actual delivery date is blank the system will then create a new postpartum and will link it to the new certification record. A new postpartum infant record will then be created and linked to the new postpartum record for the participant.

This will allow the woman to receive the Exclusively-Breastfeeding food prescription items.

### *9.26.2.4 Data Map*

The values will be saved as follows:

- CertContact table (after creating a new record):
- StateWicID - ID of the participant
- CertStartDate - the current system date
- CertEffectiveDate - the current system date
- CertEndDate - date entered by the user on the dialog
- PregnancyID - ID from the related Pregnancy table record (if the participant is certified as a pregnant woman)
- PostpartumID - ID from the related Postpartum table record (if the participant is certified as a postpartum woman)
- VOCDocument - set to "Y" for Yes
- CertAgencyID - the ID of the user's agency
- CertServiceSiteID - the ID of the user's clinic
- CertAssignedPriority - the highest priority allowed for the WIC category picked by the user (query the PriorityPerWICStatus table using the WIC category and use the highest value in the Priority field)
- CertWICStatus - WIC category picked by the user on the dialog

#### 9.26.2.4.1 RiskFactor table

- CertificationID - ID from the related CertContact table record
- RiskFactorID – set to “502” (the ID of the “Transfer of Certification” risk factor from the RiskFactorReference table)
- WICStatus - WIC category picked by the user on the dialog
- AgeCategoryID – the risk factor age category for the participant’s current age
- SystemAssigned- set to "Y" for Yes
- HighRisk - set to “N” for No

#### 9.26.2.4.2 Member table

- Terminated – set to “N” for No
- TerminatedDate – set to NULL
- WICStatus – set to the WIC category picked by the user on the dialog
- VOCDocument - set to "Y" for Yes
- ValidCertification - set to "Y" for Yes
- CertificationID - ID from the related CertContact table record
- PendingCertificationID - set to NULL
- CertStartDate - the current system date
- CertificationDueDate - date entered by the user for the Certification End Date on the dialog

#### 9.26.2.4.3 ***Pregnancy table*** (if a new pregnancy record was created)

- StateWicID - ID of the participant
- PregRcdDate - the current system date
- InfoDate - the current system date

#### 9.26.2.4.4 ***Postpartum table*** (if a new postpartum record was created)

- StateWicID - ID of the participant
- PregnancyID - ID from the Pregnancy table record if linked to the Pregnancy resulting in this postpartum certification
- CDCReportedDt - Pregnancy.CDCReportedDt if linked to a PregnancyID

#### 9.26.2.4.5 ***PostpartumInfant table*** (if a new record was created)

- PostpartumID - ID from the Postpartum table record
- InfantNumber - set to 1
- EverBreastfed - set to "Y" for Yes
- CurrentlyBreastfed - set to "Y" for Yes
- AmountBreastfeeding - set to "1" (the key value of the "Exclusively Breastfeeding" record in the BFAMOUNT category of the ReferenceDictionary table)

### *9.27 View Notes for Household Member*

The View Notes dialog allows the user to view previously created notes for the currently selected household member. Additionally, the user may create a SOAP note or general note for the household member. The View Notes dialog is invoked when the user selects the Manage Notes list item from the Participant Activities menu.

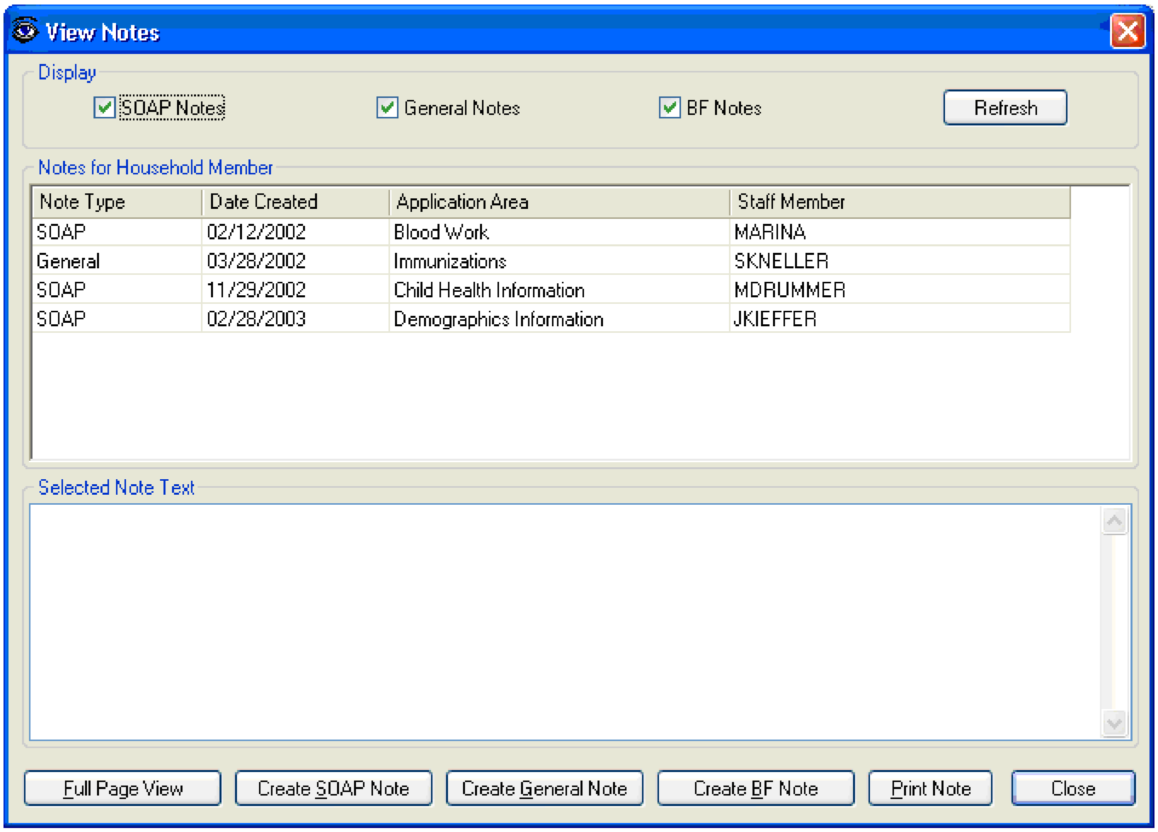



**Figure 28 - View Notes Dialog**

#### 9.27.1 Controls

This section describes the behavior of the controls on the View Notes dialog.

##### *9.27.1.1 Notes View Group (Display)*

This control allows the user to indicate which type of notes to view. The checkbox group will be enabled when the View Notes dialog is active. It consists of the following checkboxes:

- SOAP Notes
- General Notes
- BF Notes

The system will check the permissions for the currently logged-on user. If the user has the appropriate permissions (Soap Notes.View or Add; General Notes.View or Add; Breastfeeding Notes.View or Add), the checkbox group will be enabled and the checkboxes for which the user has permission will initially be selected.

Upon selection of a checkbox, the contents of the Notes display grid will be refreshed.

#### *9.27.1.2 Notes for Household Member Display Grid*

This control allows the user to view the notes that have been previously defined for the household member. The grid will be enabled when the View Notes dialog is active. It consists of the following columns:

- Note Type
- Date Created
- Application Area
- Staff Member

The grid will be filled with an entry for each note recorded on the local database for the currently selected household member according to the selection of the Notes View checkbox group as follows:

- If only the SOAP Notes checkbox is marked, entries for SOAP notes will display in the grid.
- If only the General Notes checkbox is marked, entries for general notes will display in the grid.
- If only the BF Notes checkbox is marked, entries for Breastfeeding notes will display in the grid.
- If only the SOAP Notes and General Notes checkboxes are marked, entries for SOAP notes and General Notes will display in the grid.
- If only the SOAP Notes and BF Notes checkboxes are marked, entries for SOAP notes and BF Notes will display in the grid.
- If only the General Notes and BF Notes checkboxes are marked, entries for General Notes and BF Notes will display in the grid.
- If the SOAP Notes, General Notes and BF Notes checkboxes are marked, all entries for SOAP notes, General Notes and BF Notes will display in the grid.

The system will check the permissions for the currently logged-on user. If the user does not have the appropriate permissions (ProtectedNotes.View, Add or FullControl) to view the selected protected notes, only non-protected notes and notes that the currently logged-on user created will be included in the grid. If the user has the appropriate permissions for the type of note selected (SOAP, General and/or Breastfeeding Notes), the grid will include all notes for the selected household member.

The entries will be sorted according to the value of the Date Created column in the order indicated by the *NoteSortOrder* business rule. If the *NoteSortOrder* business rule = 'C', the notes will be sorted chronologically by date. If the *NoteSortOrder* business rule = 'R', the notes will be sorted in reverse chronological order by date. The values in the control will be read-only.

#### *9.27.1.3 Selected Note View Text Box*

This control allows the user to view the actual text of the note. The text box will be enabled when the View Notes dialog is active. It will be filled with the actual text of the note selected in the Notes display grid. The contents of the control are read-only. When the text exceeds the bounds of the text box, a vertical scroll bar will display.

#### *9.27.1.4 Full Page View Button*

This control allows the user to view the currently selected note using the maximum available space on the screen to minimize the need to scroll when viewing the text. The Full Page View button will be enabled when the View Notes dialog is active. It has a mnemonic of "F".

#### *9.27.1.5 Create SOAP Note Button*

This control allows the user to create a new SOAP note for the currently selected household member. The Create SOAP Note button will be enabled when the View Notes dialog is active. It has a mnemonic of "S".

Upon selection of the button, the system will check the permissions for the currently selected user. If the user does not have the appropriate permissions (SOAP Notes.Add) to create SOAP notes for the household member, the system will invoke a standard error message with the text "You do not have the necessary permissions to create a SOAP note. Please see the supervisor."

#### *9.27.1.6 Create General Note Button*

This control allows the user to create a new general note for the currently selected household member. The Create General Note button will be enabled when the View Notes dialog is active. It has a mnemonic of "G".

Upon selection of the button, the system will check the permissions for the currently selected. If the user does not have the appropriate permissions (General Notes.Add) to create general notes for the household member, the system will invoke a standard error message with the text "You do not have the necessary permissions to create general notes. Please see the supervisor."

#### *9.27.1.7 Create BF Note Button*

This control allows the user to create a new breastfeeding note for the currently selected household member. The Create BF Note button will be enabled when the View Notes dialog is active. It has a mnemonic of "B".

Upon selection of the button, the system will check the permissions for the currently selected user. If the user does not have the appropriate permissions (Breastfeeding Notes.Add) to create breastfeeding notes for the household member, the system will invoke a standard error message with the text "You do not have the necessary permissions to create Breastfeeding notes. Please see the supervisor."

#### *9.27.1.8 Print Button*

This control allows the user to print the currently selected note. The Print button will be enabled when the View Notes dialog is active. It has a mnemonic of "P".

#### *9.27.1.9 Close Button*

This control allows the user to exit the View Notes dialog and return to the calling window. The Close button will be enabled when the View Notes dialog is active. Characteristics for the Close button are described in *Consistencies*.

### 9.27.2 Processes

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

#### *9.27.2.1 Display Full Page View of Note*

Upon selection of the Full Page View button, the system will invoke the Selected Note – Full Page View dialog described in this document.

#### *9.27.2.2 Create SOAP Note*

Upon selection of the Create SOAP Note button, the system will invoke the Create SOAP Note dialog described in this document.

#### *9.27.2.3 Create General Note*

Upon selection of the Create General Note button, the system will invoke the Create General Note dialog described in this document.

#### *9.27.2.4 Create Breastfeeding Note*

Upon selection of the Create BF Note button, the system will invoke the Create Breastfeeding Note dialog described in this document.

#### *9.27.2.5 Print Note*

Upon selection of the Print button, the system will print the note to the currently selected default report printer.

### *9.28 Full Page View of Note*

The Selected Note – Full Page View dialog allows the user to view the currently selected note on the Note display grid. The Selected Note – Full Page View dialog is invoked when the user selects the Full Page View button on the View Notes dialog.

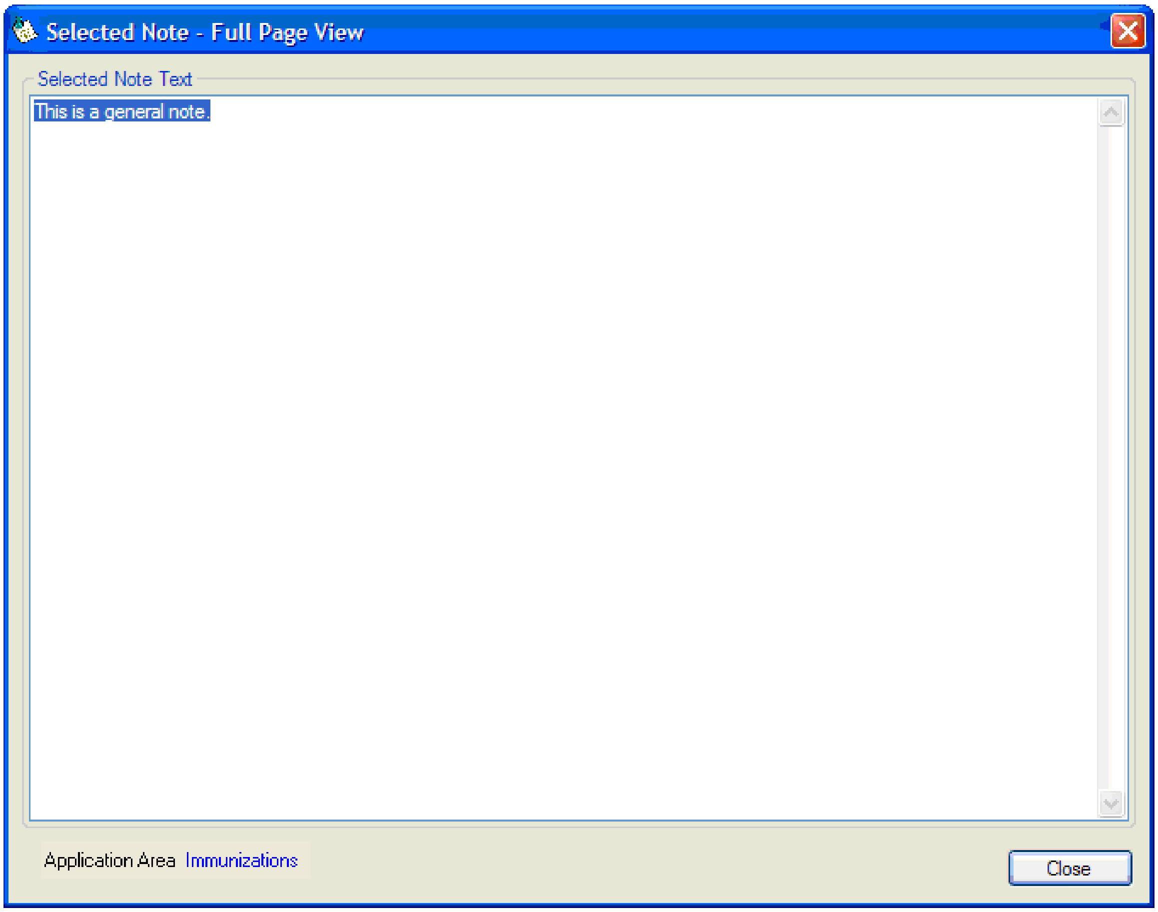



**Figure 29 – Selected Note – Full Page View Dialog**

#### 9.28.1 Controls

This section describes the behavior of the controls on Selected Note – Full Page View dialog.

#### *9.28.1.1 Selected Note Text Box*

This control allows the user to view the actual text of the note. The text box will be enabled when the Selected Note – Full Page View dialog is active. It will be filled with the actual text of the note selected in the Notes display grid of the View Notes dialog. The contents of the control are read-only. When the text exceeds the bounds of the text box, vertical scroll bar will display.

#### *9.28.1.2 Application Area Text Label and Value Label*

This control allows the user to view the area of the application the user was in when they created the note. It will display in the inverse color of the form. Note that this control does not receive focus and is not included in the tab order of this dialog.

#### *9.28.1.3 Close Button*

This control allows the user to exit the Selected Note – Full Page View dialog and return to the View Notes dialog. The Close button will be enabled when the Selected Note – Full Page View dialog is active. Characteristics for the Close button are defined in *Consistencies*.

### 9.28.2 Processes

No additional processes are defined for this dialog.

## *9.29 Create SOAP Note*

The Create SOAP Note dialog allows the user to create a SOAP note for the currently selected household member. The Create SOAP Note dialog is invoked when the user selects the Create SOAP Note button on the View Notes dialog.

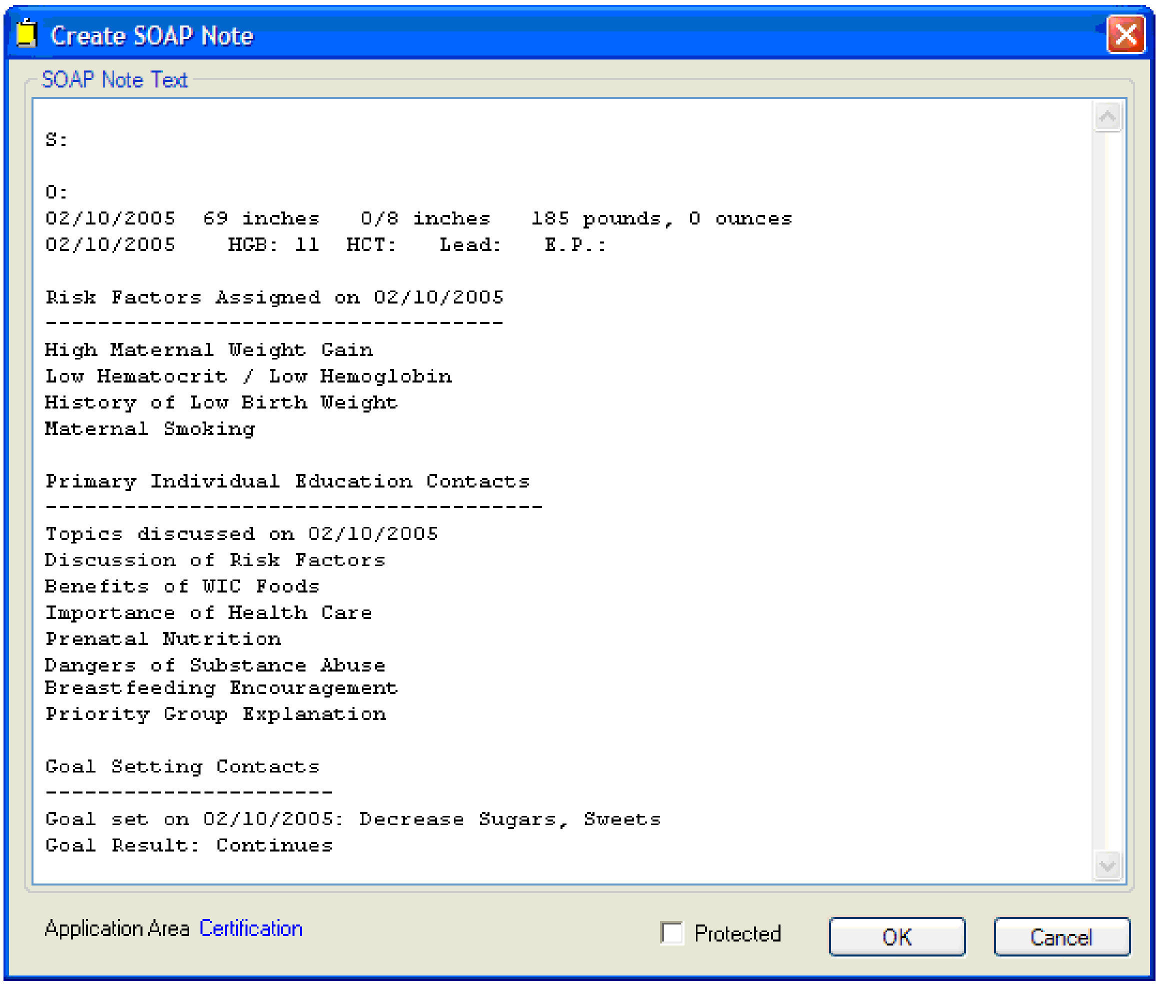



**Figure 30 - Create SOAP Note Dialog**

### 9.29.1 Controls

This section describes the behavior of the controls on the Create SOAP Note dialog.

#### *9.29.1.1 SOAP Note Text Box*

This control allows the user to enter the text of the SOAP note for the household member. The text box will be enabled when the Create SOAP Note dialog is active. When the text exceeds the bounds of the text box, vertical scroll bar will display.

The text box will initially be populated with the SOAP note template that includes the Subjective ("S:"), Objective ("O:"), Assessment ("A:") and Plan ("P:") sections. When the *NoSubjectiveInSOAP* business rule is set to True, the Subjective section will not be included in the SOAP note template. When the *NoSubjectiveInSOAP* business rule is set to False, the Subjective section will be included in the SOAP note template. The Objective section will automatically be populated with the height, weight, blood work, referrals and risk factor information from the current certification. The height information will include the growth chart percentiles for the height and weight measurements.

When the *AddEducationToSOAP* business rule is set to True, the Objective section will automatically be populated with the Goal Setting and Individual Primary education contacts that have been recorded during the current certification.

When the *AddAnalysisToSOAP* business rule is set to True, the Assessment section will automatically be populated with the default assessment information that is associated with each risk factor that was assigned to the current certification.

When the *AddPlanToSOAP* business rule is set to True, the Plan section will automatically be populated with the default plan information that is associated with each risk factor that was assigned to the current certification as well as the referral information for the participant

The control will have focus upon entry to the dialog. The cursor will be placed on the second line following the "S". When the *ExcludeSubjective* business rule is set to True, the cursor will instead be placed on the second line following the "A".

The SOAP Note template is populated as follows:

**S:** (Subjective) - defaults blank

**O:** (Objective) The Objective section is populated with all of the following:

Each height/weight measurement is formatted as follows:

{date} {inches} {eighths}/8 inches {pounds} pounds, {ounces} ounces

{date} = AnthropContact.MeasurementDate

{inches} = AnthropContact.LengthInches

{eighths} = AnthropContact.LengthEighths

{pounds} = AnthropContact.WeightPounds

{ounces} = AnthropContact.WeightOunces

Each blood work measurement is formatted as follows:

{date} HGB: {hemoglobin} HCT: {hematocrit} Lead: {lead} E.P.: {EP}

{date} = BloodWork.ResultDate

{hemoglobin} = BloodWork.Hemoglobin

{hematocrit} = BloodWork.Hematocrit

{lead} = BloodWork.Lead

{EP} = BloodWork.EP

Each risk factor is formatted as follows:

{ID} {description}

{ID} = RiskFactor.RiskFactorID

{description} = RiskFactorReference.Description for the RiskFactor.RiskFactorID

If the ADDEDUCATIONTOSOAP business rule = 'Y',

Each primary individual education contact for the most recent contact for the current certification will display:

Topics discussed on {date}

{topic}

NOTE: The {topic} line is repeated for each DiscussionTopic record that is related to the EducationContact record.

{date} = EducationContact.ContactDate

{topic} = IndividualEducationTopic.Description for the DiscussionTopic.Topic

If the ADDEDUCATIONTOSOAP business rule = 'Y'

Each goal setting contact the most recent contact for the current certification will display:

Goal set on {date}: {goal}

Goal Result: {result}

{date} = EducationContact.ContactDate

{goal} = ReferenceDictionary.Description for EducationContact.Goal

{result} = ReferenceDictionary.Description for EducationContact.GoalResult

**A:** (Assessment) - If the ADDANALYSISTOSOAP business rule = 'Y', the Assessment section is populated with the RiskFactorReference.DefaultAssessment for all of the RiskFactor records associated with the current CertContact record for the participant. Otherwise it is blank.

**P:** (Plan) If the ADDPLANTOSOAP business rule = 'Y', -the Plan section is populated with the RiskFactorReference.DefaultPlan for all of the RiskFactor records associated with the current CertContact record for the participant. Otherwise it will default blank.

### *9.29.1.2 Application Area Text Label and Value Label*

This control allows the user to view the area of the application where they were working right before creating this note. It will display in the inverse color of the form. Note that this control does not receive focus and is not included in the tab order of this dialog.

### *9.29.1.3 Protected Check Box*

This control allows the user to indicate that the note contains sensitive information and it will only be displayed to the user who created the note and the staff members who have the ProtectedNote.View permission for SOAP Notes. The check box will be enabled when the Create SOAP Note dialog is active. It has an initial value of cleared.

### *9.29.1.4 OK Button*

This control allows the user to save the SOAP note and exit the Create SOAP Note dialog. It will be enabled when the Create SOAP Note dialog is active. Characteristics for the OK button are defined in *Consistencies*.

#### *9.29.1.5 Cancel Button*

This control allows the user to discard the changes made to the SOAP note and exit the Create SOAP Note dialog. It will be enabled when the Create SOAP Note dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 9.29.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Create SOAP Note dialog.

#### *9.29.2.1 Initializing the Interface*

Upon initial display, set the title bar text to "Create SOAP Note".

The SOAP Note text box will initially be populated as described under the SOAP Note Text Box.

The Application Area will display the area of the application where the user was working right before they created the note.

The Protected check box will initially be blank.

#### *9.29.2.2 Edits*

Upon selection of the OK button, if an entry is not made in the SOAP Note text box, the system will invoke a standard error message with the text "An entry is required for the {control label}". A change is required in addition to the text contained in the SOAP Note template. The text in the template alone does not satisfy the requirement that an entry be made in the text box.

#### *9.29.2.3 Save SOAP Note*

Upon selection of the OK button, the system will write the SOAP note information on the dialog to the database (see *Data Map* section below). The system will then close the Create SOAP Note dialog and proceed as follows, the system will return to the View Notes dialog.

### *9.29.2.4 Data Map*

| Control Label | Entity | Attribute | Business Rule |
|---|---|---|---|
| Participant | HealthNote | StateWICID | |
| SOAP Note Text | HealthNote | NoteText | |
| Application Area | HealthNote | ApplicationArea | |
| Protected | HealthNote | Protected | |

## *9.30 Create General Note*

The Create General Note dialog allows the user to create a general note for the currently selected household member. The Create General Note dialog is invoked when the user selects the Create General Note button on the View Notes dialog.

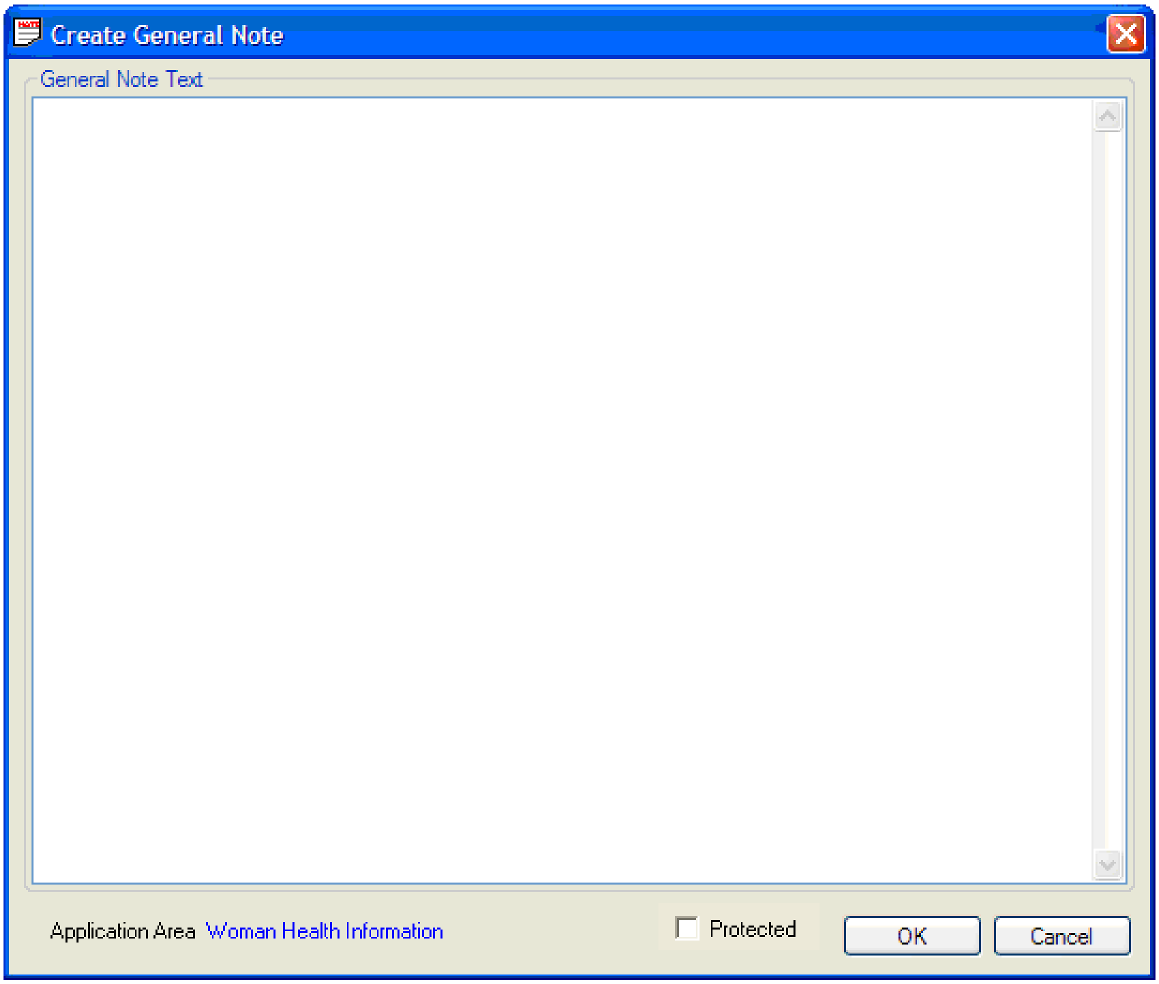



**Figure 31 - Create General Note Dialog**

### 9.30.1 Controls

This section describes the behavior of the controls on the Create General Note dialog.

#### *9.30.1.1 General Note Text Box*

This control allows the user to enter the text of the general note for the household member. The text box will be enabled when the Create General Note dialog is active. When the text exceeds the bounds of the text box, a vertical scroll bar will display. It will initially be blank. The control will have focus upon entry to the dialog.

#### *9.30.1.2 Application Area Text Label and Value Label*

This control allows the user to view the area of the application where they were working right before creating this note. It will display in the inverse color of the form. Note that this control does not receive focus and is not included in the tab order of this dialog.

#### *9.30.1.3 Protected Check Box*

This control allows the user to indicate that the note contains sensitive information and it should only be displayed to the user who created the noted and staff members who have the proper security. The check box will be enabled when the Create General Note dialog is active. It has an initial value of cleared.

#### *9.30.1.4 OK Button*

This control allows the user to save the general note and exit the Create General Note dialog. The OK button will be enabled when the Create General Note dialog is active. Characteristics for the OK button are defined in *Consistencies*.

#### *9.30.1.5 Cancel Button*

This control allows the user to discard changes made to the general note and exit the Create General Note dialog. The Cancel button will be enabled when the Create General Note dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 9.30.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Create General Note dialog.

#### *9.30.2.1 Initializing the Interface*

Upon initial display, set the title bar text to “Create General Note”.

The General Note text box will initially be blank.

The Application Area will display the area of the application where the user was working right before they created the note.

The Protected check box will initially be blank.

### *9.30.2.2 Edits*

Upon selection of the OK button, if an entry is not made in the General Note text box, the system will invoke a standard error message with the text “An entry is required for the {control label}”.

### *9.30.2.3 Save General Note*

Upon selection of the OK button, the system will write the general note information on the dialog to the database (see *Data Map* section below). The system will then close the Create General Note dialog and return to the View Notes dialog.

### *9.30.2.4 Data Map*

| **Control Label** | **Entity** | **Attribute** | **Business Rule** |
|---|---|---|---|
| Participant | HealthNote | StateWICID | |
| General Note Text | HealthNote | NoteText | |
| Application Area | HealthNote | ApplicationArea | |
| Protected | HealthNote | Protected | |

### *9.31 Create Breastfeeding Note*

The Create Breastfeeding Note dialog allows the user to create a breastfeeding note for the currently selected household member. The Create Breastfeeding Note dialog is invoked when the user selects the Create BF Note button on the View Notes dialog.

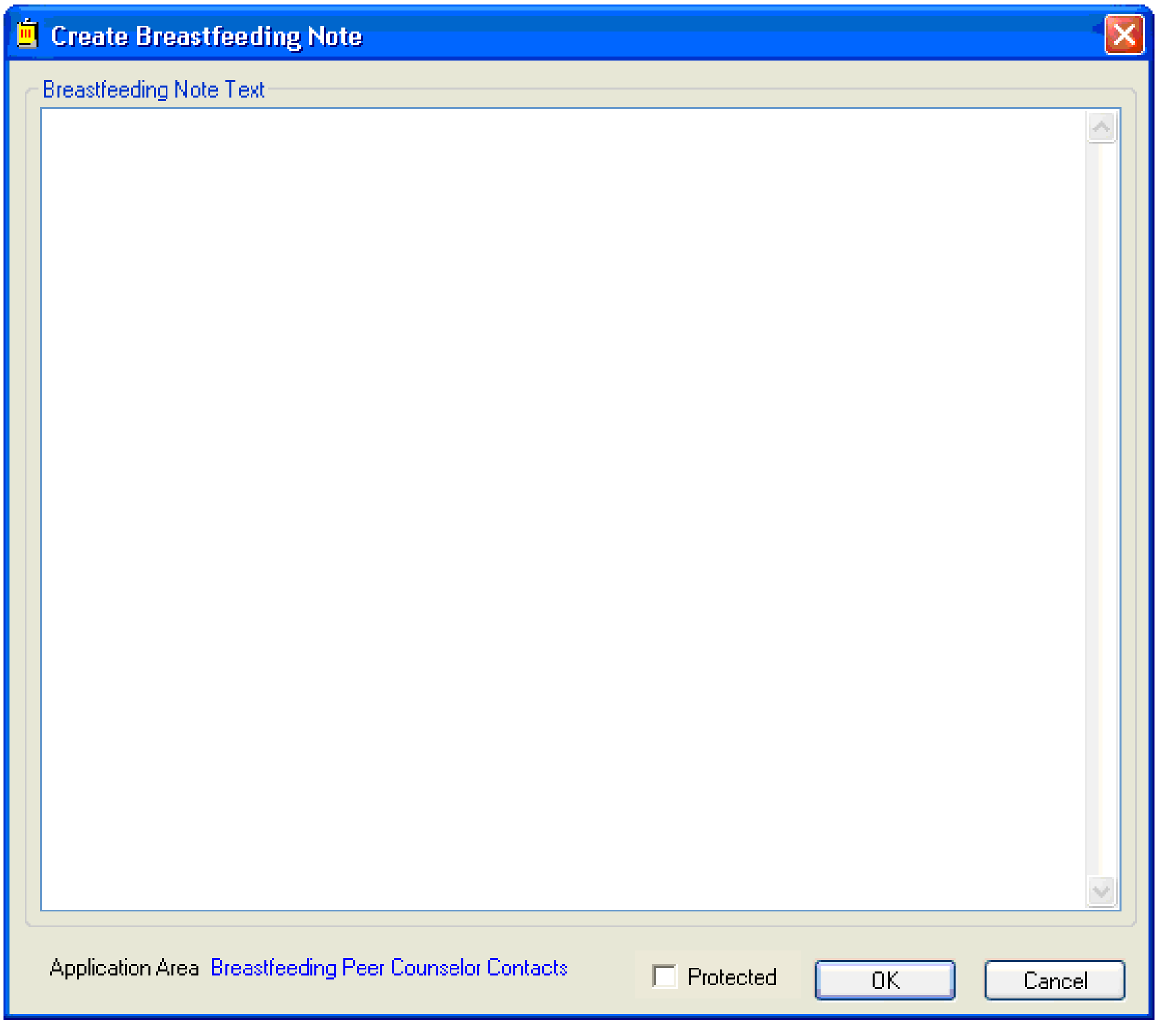



**Figure 32 - Create Breastfeeding Note Dialog**

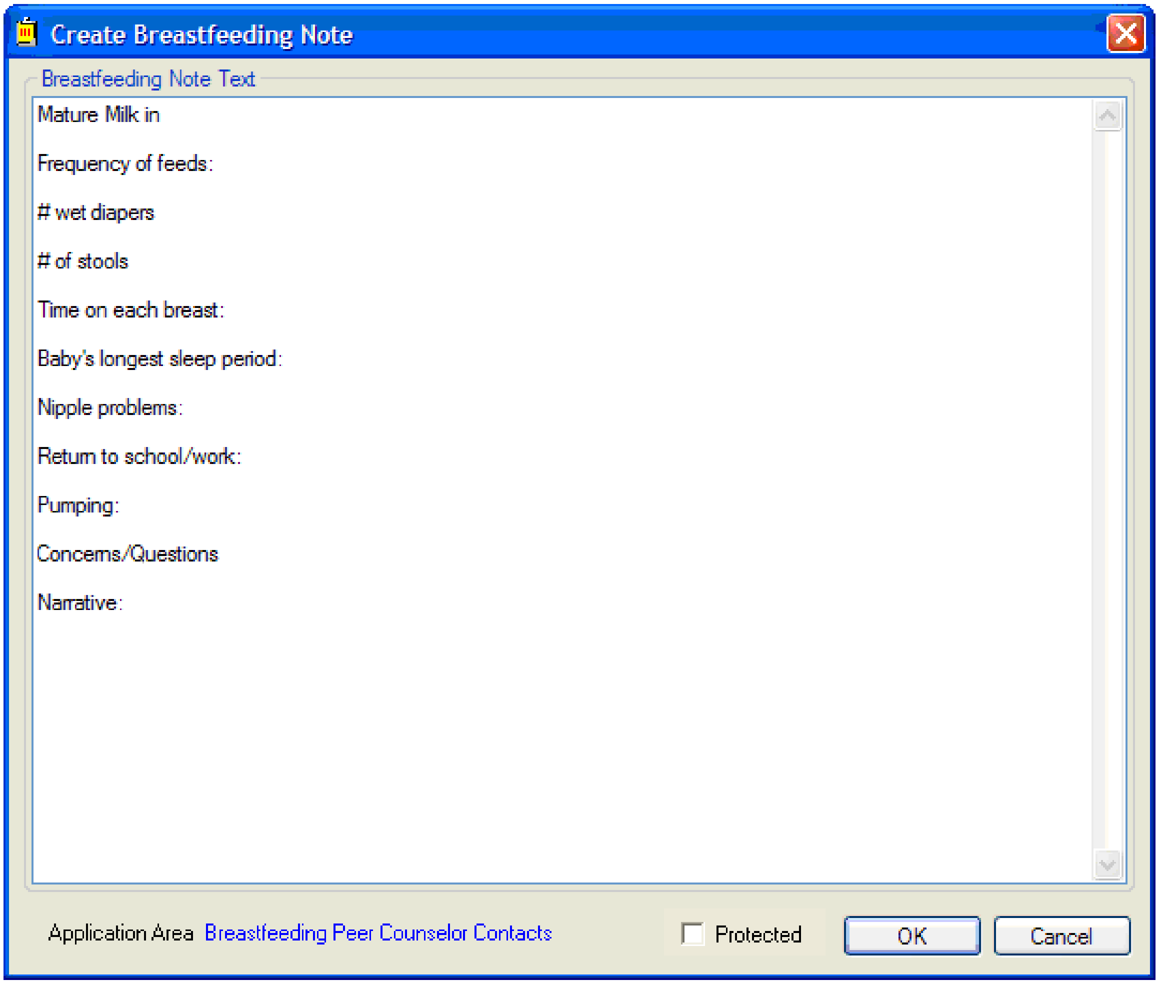



**Figure 33 - Create Breastfeeding Note Dialog (with template)**

## 9.31.1 Controls

This section describes the behavior of the controls on the Create Breastfeeding Note dialog.

### *9.31.1.1 Breastfeeding Note Text Box (BF Note Text)*

This control allows the user to enter the text of the breastfeeding note for the household member. The text box will be enabled when the Create Breastfeeding Note dialog is active. When the text exceeds the bounds of the text box, a vertical scroll bar will display. The control will have focus upon entry to the dialog.

#### *9.31.1.2 Application Area Text Label and Value Label*

This control allows the user to view the area of the application where they were working right before creating this note. It will display in the inverse color of the form. Note that this control does not receive focus and is not included in the tab order of this dialog.

#### *9.31.1.3 Protected Check Box*

This control allows the user to indicate that the note contains sensitive information and it should only be displayed to the user who created the noted and staff members who have the proper security. The check box will be enabled when the Create Breastfeeding Note dialog is active. It has an initial value of cleared.

#### *9.31.1.4 OK Button*

This control allows the user to save the general note and exit the Create Breastfeeding Note dialog. The OK button will be enabled when the Create Breastfeeding Note dialog is active. Characteristics for the OK button are defined in *Consistencies*

#### *9.31.1.5 Cancel Button*

This control allows the user to discard changes made to the breastfeeding note and exit the Create Breastfeeding Note dialog. The Cancel button will be enabled when the Create Breastfeeding Note dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 9.31.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Create Breastfeeding Note dialog.

#### *9.31.2.1 Initializing the Interface*

Upon initial display, set the title bar text to “Create Breastfeeding Note”.

The system will invoke a standard warning message with the text “Do you want to use the Breastfeeding Note template?” The options of Yes and No will be available. If the user selects Yes, the system will initially populate the Breastfeeding Note text box with the Breastfeeding Note template that has been defined by the state. If the user selects No, the system will leave Breastfeeding Note text box blank.

The Application Area will display the area of the application where the user was working right before they created the note.

The Protected check box will initially be blank.

#### *9.31.2.2 Edits*

Upon selection of the OK button, if an entry is not made in the Breastfeeding Note text box, the system will invoke a standard error message with the text "An entry is required for the {control label}". A change is required in addition to the text contained in the Breastfeeding Note template. The text in the template alone does not satisfy the requirement that an entry be made in the text box.

#### *9.31.2.3 Save Breastfeeding Note*

Upon selection of the OK button, the system will write the breastfeeding note information on the dialog to the database (see *Data Map* section below). The system will then close the Create Breastfeeding Note dialog and return to the View Notes dialog.

#### *9.31.2.4 Data Map*

| **Control Label** | **Entity** | **Attribute** | **Business Rule** |
|---|---|---|---|
| Participant | HealthNote | StateWICID | |
| Breastfeeding Note Text | HealthNote | NoteText | |
| Application Area | HealthNote | ApplicationArea | |
| Protected | HealthNote | Protected | |

### *9.32 Alerts List for Household*

The Alerts List for Household dialog allows the user to view the alerts defined for the currently selected household member and other members of the household. The user can also add, edit, or delete alerts for the household members. The Alerts List for Household dialog is invoked when the user selects the Manage Alerts menu item from the Participant Activities menu.

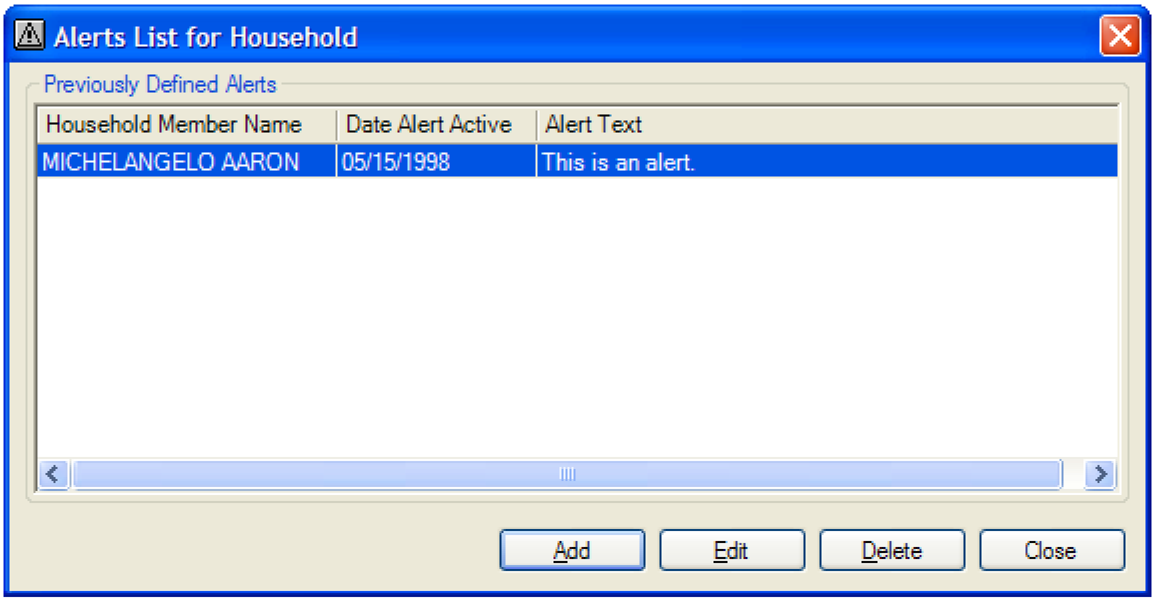



**Figure 34 - Alerts List for Household Dialog**

#### 9.32.1 Controls

This section describes the behavior of the controls on the Alerts List for Household dialog.

##### *9.32.1.1 Alerts Display Grid (Previously Defined Alerts)*

This control allows the user to view the defined alerts for the currently selected household member and other members of the household. The grid will be enabled when the Alerts List for Household dialog is active. It consists of the following columns:

- Household Member Name
- Date Alert Active
- Abbreviated Text of Alert (Alert Text)

The grid will be filled with entries for all defined alerts for the household member and other members of the household. (Member.LastName Member.FirstName Member.MiddleInitial) (Alert.ActiveDate) (The first 35 characters of the Alert.MessageText) The system will check the permissions for the currently logged-on user. If the user does not have the appropriate permissions (ProtectedAlerts.View, Add or FullControl) to view protected alerts, only non-protected alerts will be included in the grid.

The entries will be sorted in reverse chronological order according to the value of the Date Alert Active column. The values in the control will be read-only.

#### *9.32.1.2 Add Button*

This control allows the user to add an alert for the currently selected household member. The Add button will be enabled when the Alerts List for Household dialog is active. It has a mnemonic of “A”.

Upon selection of the button, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Alerts.Add or FullControl) to add an alert for the household member, the system will invoke a standard error message with the text “You do not have the necessary permissions to add an alert. Please see the supervisor.”

#### *9.32.1.3 Edit Button*

This control allows the user to update information about the alert selected on the Alerts display grid. The Edit button will be enabled when an alert is selected on the Alerts display grid. It has mnemonic of “E”.

Upon selection of the button, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Alerts.FullControl) to edit an alert for the household member, the system will invoke a standard error message with the text “You do not have the necessary permissions to edit an alert. Please see the supervisor.”

#### *9.32.1.4 Delete Button*

This control allows the user to delete the alert selected on the Alerts display grid. The Delete button will be enabled when an alert is selected on the Alerts display grid. It has a mnemonic of “D”.

Upon selection of the button, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Alerts.FullControl) to delete an alert for the household member, the system will invoke a standard error message with the text "You do not have the necessary permissions to delete an alert. Please see the supervisor."

#### *9.32.1.5 Close Button*

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

### 9.32.2 Processes

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

#### *9.32.2.1 Initializing the Interface*

Upon initial display of the dialog, the title bar text will be set to "Alerts List for Household"

The Previously Defined Alerts grid will display all members of the household who have alerts defined. The system will check the permissions for the currently logged-on user. If the user does not have the appropriate permissions (Protected Alerts.View, Add or FullControl) to view protected alerts, only non-protected alerts will be included in the grid. The Grid will display the (Member.LastName Member.FirstName Member.MiddleInitial) (Alert.ActiveDate) (the first 35 characters of the Alert.MessageText).

#### *9.32.2.2 Add Alert*

Upon selection of the Add button, the system will invoke the Update Alert dialog in Add mode as described in Section 9.33.

#### *9.32.2.3 Edit Alert*

Upon selection of the Edit button, the system will invoke the Edit Alert dialog in Edit mode as described in Section 9.33.

#### *9.32.2.4 Delete Alert*

Upon selection of the Delete Alert button, the system will invoke a standard warning message with the text "Are you sure you want to delete this alert?" The options of Yes and No will be available. If the user selects Yes, the system will delete the alert selected on the Alerts display grid and update the contents of the grid. If the user selects No, the system will return to the Alerts List for Household dialog without deleting the alert.

### *9.33 Update Alert*

The Update Alert dialog allows the user to add an alert to a household or household member, or edit the alert selected on the Alerts display grid of the Alerts List for Household dialog. The Update Alert dialog is invoked in response to the following user actions:

- Selection of the Add button on the Alerts List for Household dialog described in this document.
- Selection of the Edit button on the Alerts List for Household dialog described in this document.

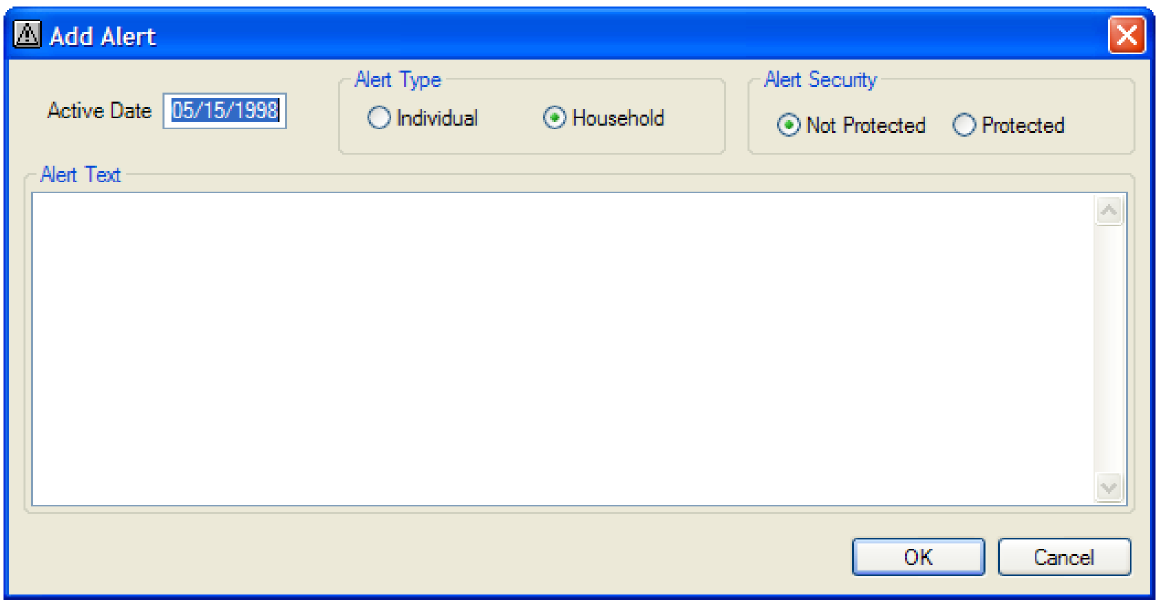



**Figure 35 - Add Alert Dialog**

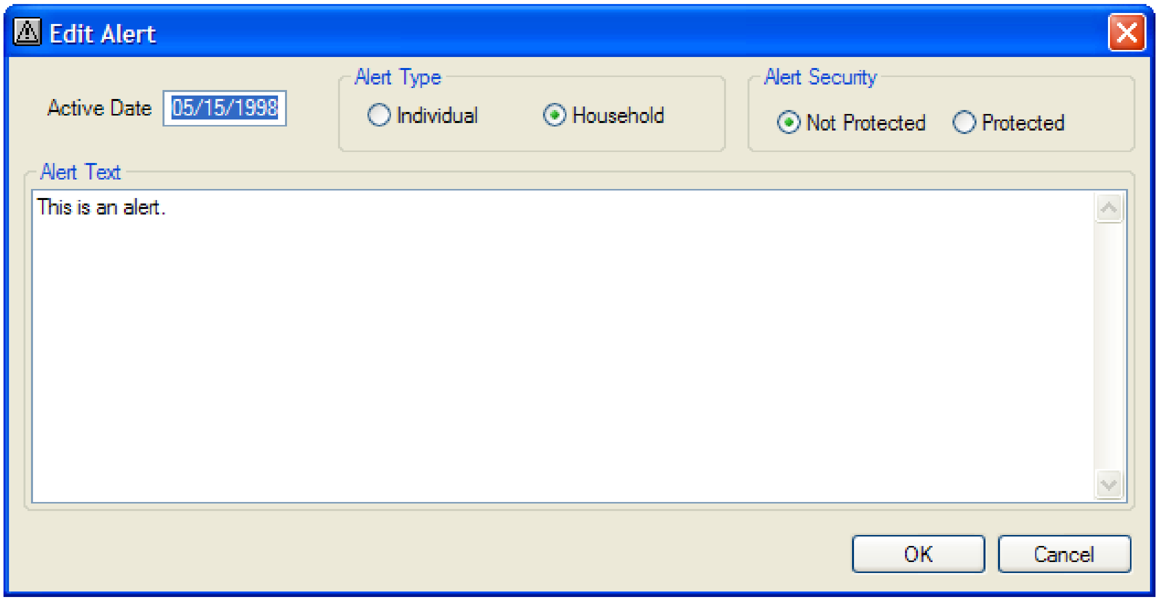



**Figure 36 - Edit Alert Dialog**

If this dialog was invoked from the Add button of the Alerts List for Household dialog, it is considered to be in Add mode. If the dialog was invoked from the Edit button of the Alerts List for Household dialog, it is considered to be in Edit mode.

## 9.33.1 Controls

This section describes the behavior of the controls on the Update Alert dialog.

### *9.33.1.1 Active Date Masked Edit Box*

This control allows the user to enter the date on which the alert will begin to appear for the household member. The masked edit box will be enabled when the Update Alert dialog is active. The masked edit box will only accept entry of numeric digits. The mask on the box will be "##/##/####" to accept a date with a four digit year. If the dialog is in Add mode, it will default to the current system date. If the dialog is in Edit mode, the control will be populated with the value of the entry selected on the Alerts display grid on the Alerts List for Household dialog.

If an invalid date is entered, the system will invoke a standard error message with the text "An entry is required for the Active Date."

### *9.33.1.2 Alert Type Radio Button Group*

This control allows the user to indicate whether the alert appears just for the individual member or for all members of the household. The radio button group will be enabled when the Update Alert dialog is active. It consists of the following radio buttons:

- Individual
- Household

If the dialog is in Add mode, the Household radio button will default to selected. If the dialog is in Edit mode, the control will be populated with the value of the entry selected on the Alerts display grid on the Alerts List for Household dialog.

### *9.33.1.3 Alert Security Radio Button Group*

This control allows the user to indicate that an alert should be protected. A protected alert may only be viewed by a user who has the proper permission to view a protected alert. The radio button group consists of the following radio buttons:

- Not Protected
- Protected

The radio button group will be enabled when the user has permission to view a protected alert. If the dialog is in Add mode, the Not Protected radio button will default to selected. If the dialog is in Edit mode, the control will be populated with the value of the entry selected on the Alerts display grid on the Alerts List for Household dialog. If the user does not have permission to view a protected alert, the Not Protected radio button will be selected and the radio button group will be disabled.

### *9.33.1.4 Alert Text Box*

This control allows the user to enter the actual text of the alert. The text box will be enabled when the Update Alert dialog is active. If the dialog is in Add mode, the control will initially be blank. If the dialog is in Edit mode, the control will be populated with the value of the entry selected on the Alerts display grid on the Alerts List for Household dialog. When the text exceeds the bounds of the text box a vertical scroll bar will display.

### *9.33.1.5 OK Button*

This control allows the user to save the alert information and exit the Update Alert dialog. The OK button will be enabled when the Update Alert dialog is active. Characteristics for the OK button are defined in *Consistencies*.

#### *9.33.1.6 Cancel Button*

This control allows the user to discard any changes made to the alert and exit the Update Alert dialog. The Cancel button will be enabled when the Update Alert dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 9.33.2 Processes

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

#### *9.33.2.1 Edit for Required Entry in Controls*

Upon selection of the OK button, the system will check that values have been entered in the following controls:

- Active Date masked edit box
- Alert Type radio button group
- Alert Security radio button group
- Alert text box

If an entry is not made in an above-listed control, the system will invoke a standard error message with the text "An entry is required for the {descriptive name of value represented by control}".

#### *9.33.2.2 Edit for Legitimate Values in Controls*

Upon successful completion of the above-listed edits, the system will check that the values entered into the controls are considered legitimate as follows:

- The date value entered in the Active Date masked edit box must be equal to or greater than the current system date.

#### *9.33.2.3 Perform Cross-Edits for Values in Controls*

No controls on the Update Alert dialog participate in cross-edits.

#### *9.33.2.4 Save Values*

Upon successful completion of the above-listed edits, the system will save the alert information to the database. If the dialog is in Add mode, the system will add a record to the Alerts display grid on the Alerts List dialog. If the dialog is in Edit mode, the system will update the currently selected record on the Alerts display grid on the Alerts List dialog. The system will then return to the Alerts List dialog.

### *9.34 Generate Pending Termination Notice*

The Generate Pending Termination Notice dialog allows the user to generate a notice for a participant who will have their current enrollment terminated by automatic means within a State-defined warning period from the current system date. The warning period is the number of days in the TerminationNoticeWarningPeriod business rule.

The qualifications for automatic termination are:

- A certification attempt was started but not completed within the allowed time frame based upon the following business rules:
  - When the participant is a Migrant their incomplete certification must be completed before the number of days in the IncompCertLimitMigrant business rule.
  - When the participant is Pregnant their incomplete certification must be completed before the number of days in the IncompCertLimitPregnant business rule.
  - When the participant does not meet any of the above conditions their incomplete certification must be completed before the number of days in the IncompCertLimitOther business rule.
- The participant has delayed blood work that is older than the value set by the CertLimitWithDelayedBloodWork business rule..
- The participant became categorically ineligible for WIC benefits. These participants are children who have reached their fifth birthday, and pregnant women who are six weeks postpartum according to the expected delivery date for the pregnancy.
- If the more than 2 months has past since the last date to use of the participant's last set of checks.
- The participant failed to re-certify within 36 days after their certification due date.

The user may also generate an address label for the recipient of the notice. The Generate Pending Termination Notice dialog is invoked when the user selects the Generate Pending Termination Notice menu item on the Participant Activities menu.

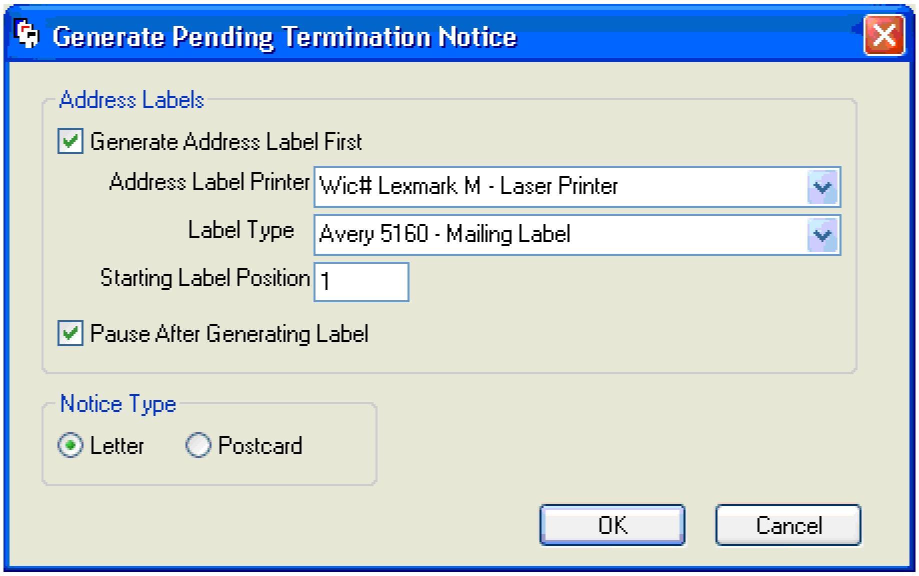



**Figure 37 - Generate Pending Termination Notice Dialog**

## 9.34.1 Controls

This section describes the behavior of the controls on the Generate Pending Termination Notice dialog.

### *9.34.1.1 Generate Address Label First Check Box*

The check box will be enabled when the Generate Pending Termination 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

Upon entering a check mark in the Generate Address Label First check box:

- The Address Label Printer dropdown will become enabled and default to blank
- The Label Type dropdown will become enabled and default to blank
- The Starting Label Position text box will become enabled and default to blank.
- The Pause after Generating Label check box will remains disabled.

#### *9.34.1.2 Address Label Printer Dropdown*

The dropdown will be enabled when the Generate Address Label First check box is marked. The dropdown list will display an entry for each defined document printer. When enabled by checking the Generate Address Labels First check box, the field will default to blank.

Upon selection of a laser printer in the Address Label printer dropdown, the Starting Label Position text box will become enabled and default to 1.

Upon selection of a dot matrix printer in the Address Label printer dropdown, the Starting Label Position text box remains disabled.

#### *9.34.1.3 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'.

#### *9.34.1.4 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.

#### *9.34.1.5 Pause after Generating Label Check Box*

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

#### *9.34.1.6 Notice Type Radio Button Group*

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

- Letter
- Postcard

#### *9.34.1.7 OK Button*

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

#### *9.34.1.8 Cancel Button*

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

### 9.34.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Pending Termination Notice dialog.

#### *9.34.2.1 Initializing the Interface*

Upon initial display, set the title bar text to "Generate Pending Termination 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.

#### *9.34.2.2 Edits*

Upon selection of the OK button, 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.”

#### *9.34.2.3 Pending Termination Notice Processing*

Upon successful completion of data validation, if the Generate Address Label First check box is marked, the system will generate an address label. The criteria for generating the address labels as well as the format of the labels are described in Chapter 13 - System Outputs.

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 pending termination notice described in Chapter 13 - System Outputs.

## *9.35 Produce Participant Summary*

The Produce Participant Summary dialog allows the user to select the criteria for generating a participant summary for the currently selected household member. The Produce Participant Summary dialog is invoked when the user selects the Print Participant Summary menu item from the Participant Activities menu.

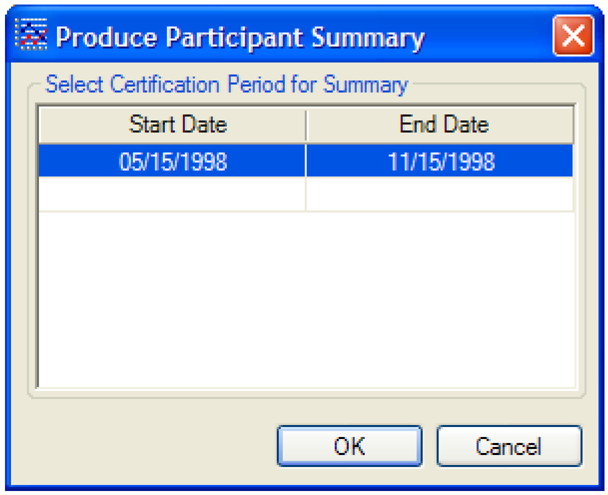



**Figure 38 - Produce Participant Summary Dialog**

### 9.35.1 Controls

This section describes the behavior of the controls on the Produce Participant Summary dialog.

#### *9.35.1.1 Select Certification Period for Summary Display Grid*

This control allows the user to select the certification period to include on the Participant Summary report. The grid will be enabled when the Produce Participant Summary dialog is active. It consists of the following columns:

- Start Date
- End Date

The grid will contain an entry for each certification contact for the participant. The entries will be sorted reverse in chronological order according to the value of the Start date column. The values in the control will be read-only.

#### *9.35.1.2 OK Button*

This control allows the user to instruct the system to generate the Participant Summary report. The OK button will be enabled when the Produce Participant Summary dialog is active. Characteristics for the OK button are defined in *Consistencies*.

#### *9.35.1.3 Cancel Button*

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

### 9.35.2 Processes

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

#### *9.35.2.1 Edit for Required Entry in Controls*

Upon selection of the OK button, the system will check that a selection was made from the Certification Period display grid. If a selection is not made in the grid, the system will invoke a standard error message with the text "A certification period must be selected to produce a Participant Summary."

### *9.36 Participant Summary (Output)*

This report allows the user to print a summary report of participant information for the currently selected participant. The Participant Summary is printed when the user selects the OK button on the Produce Participant Summary dialog.

**Participant Summary Report**

```
System Name                 Participant Summary                     10/22/2004
Don User                       Johnny Smith                           12:30:00
                         06/16/2004 - 05/28/2005                      Page   1

State WIC ID:   00001303              Household WIC ID: 12345678
DOB:            05/28/2005

Address:       1234 Forty Fourth Street,  Anytown,  KS  66210-4444
Telephone:     555-555-5647          Authorized Rep: Jeanie Smith

Certification Effective   Start: 06/16/2004   End: 05/28/2005
Category:      Infant     Priority:  1
 ----------------------------------------------------------------------
Height/Weight
     Date                   Stature                        Weight             W/S%   BMI  BMI%
  ----------   -----------------------------  ----------------------------  -----    ---  ----
  05/28/2004     1 feet  7 3/8 inches  43.1%     5 pounds 12 ounces   6.3%   3.2%
  06/16/2004     1 feet  8 1/8 inches  26.8%     7 pounds 12 ounces  21.0%  38.6%

----------------------------------------------------------------------
Blood Work
    Date     HGB    HCT   Lead E.P.    Reason Not Collected
 ---------- ------ ------ ---- ----   ----------------------
 06/16/2004  10.5

 ----------------------------------------------------------------------
Risk Factors
  Anemia (High Risk)
  Small for Gestational Age

 ----------------------------------------------------------------------
Food Package
     Date       Qty        Description
  ----------   -----  ---------------------
  09/28/2004     31   13-OZ CANS(S) ENFAMIL PROSOBEE LIPIL CONCENTRATE
                 16   OUNCES INFANT CEREAL

----------------------------------------------------------------------
Group Nutrition Education Topics

     Date                     Topic
  ----------     ------------------------------
  06/16/2004       Breastfeeding

 ----------------------------------------------------------------------
Food Instruments
   First Use       Last Use      Nbr Chks
      Date           Date         Issued
  ------------   ------------   ----------
   06/16/2004     07/15/2004         3
   05/01/2004     10/31/2004         2   (Farmers Market)
```

### 9.36.1 Data Elements

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

### *9.36.1.1 Report Title*

The title of the report will be the text "Participant Summary". A subtitle will indicate the full name of the participant.

#### 9.36.1.1.1 Origin of Data Element

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

#### 9.36.1.1.2 Format

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

### *9.36.1.2 Report Subtitle - Certification Period*

The subtitle will indicate the starting and ending dates of the Certification period for the participant.

#### 9.36.1.2.1 Origin of Data Elements

The certification period for the report is selected by the user on the Produce Participant Summary dialog described in Section 9.34.

#### 9.36.1.2.2 Format

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

### *9.36.1.3 State WIC ID*

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

#### 9.36.1.3.1 Origin of Data Element

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

#### 9.36.1.3.2 Format

The value will print as its literal value.

### *9.36.1.4 Household ID*

This value will be the Household ID of the participant.

##### 9.36.1.4.1 Origin of Data Element

The value will be taken from the Household-ID attribute of the MEMBER entity.

##### 9.36.1.4.2 Format

The value will print as its literal value.

#### *9.36.1.5 Date of Birth (DOB)*

The value will be the date of birth declared by the participant during enrollment.

##### 9.36.1.5.1 Origin of Data Element

The value will be taken from the Date-Of-Birth attribute of the MEMBER entity.

##### 9.36.1.5.2 Format

The value will print as its literal value.

#### *9.36.1.6 Client Mailing Address (Address)*

This value will be the mailing address of the household of the participant.

##### 9.36.1.6.1 Origin of Data Element

The value will be taken from the Mail-Address, Mail-City, Mail-State, and Mail-ZIP-Code attributes of the HOUSEHOLD entity.

##### 9.36.1.6.2 Format

The value will print as its literal value.

#### *9.36.1.7 Client Telephone Number (Telephone)*

This value will be the telephone number of the household of the participant.

##### 9.36.1.7.1 Origin of Data Element

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

##### 9.36.1.7.2 Format

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

### *9.36.1.8 Authorized Representative (Authorized Rep)*

This value will be the full name of the authorized representative of the participant.

#### 9.36.1.8.1 Origin of Data Element

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

#### 9.36.1.8.2 Format

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

### *9.36.1.9 Certification Effective Start Date*

This value will be the date from which the participant is certified and can utilize WIC benefits.

#### 9.36.1.9.1 Origin of Data Element

The value will be taken from the Cert-Effective-Date attribute of the CERT-CONTACT entity.

#### 9.36.1.9.2 Format

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

### *9.36.1.10 Certification Effective End Date*

This value will be the end date after which the participant is no longer certified and cannot utilize WIC benefits.

#### 9.36.1.10.1 Origin of Data Element

The value will be taken from the Cert-End-Date attribute of the CERT-CONTACT entity.

#### 9.36.1.10.2 Format

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

### *9.36.1.11 Category*

This value will be the WIC Category of the participant.

#### 9.36.1.11.1 Origin of Data Element

The value will be taken from the textual lookup value of the Cert-WIC-Status of the CERT-CONTACT entity.

#### 9.36.1.11.2 Format

The value will print in its literal format.

### *9.36.1.12 Priority*

This value will be the service level that indicates the relative importance of serving the WIC participant.

#### 9.36.1.12.1 Origin of Data Element

The value will be derived from the Cert-Assigned-Priority of the CERT-CONTACT entity.

#### 9.36.1.12.2 Format

The value will print as its literal value.

### *9.36.1.13 Date (Height/Weight Measurement)*

This value will be the date that the height/weight measurements were taken.

#### 9.36.1.13.1 Origin of Data Element

The value will be taken from the Measurement-Date attribute of the ANTHROP-CONTACT entity.

#### 9.36.1.13.2 Format

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

### *9.36.1.14 Height (Height/Weight Measurement)*

The value reflects the height of the participant in standard terms of feet and inches. Inches may include eighths of inches for infants.

#### 9.36.1.14.1 Origin of Data Element

The value will be taken from the Length-Inches and Length-Eighth attributes of the ANTHROP-CONTACT entity. The value of the Length-Inches attribute will be divided by twelve to derive the number of feet. The remainder of inches and eighths will be stated together in one component (e.g. 62/7 inches).

#### 9.36.1.14.2 Format

The value will print in a concatenated format of measurements and literals. For example, "1 foot 2 3/8 inches" would be derived from 14 and 3 respectively in the Length-Inches and Length-Eighth attributes.

### *9.36.1.15 Height for Age Percentile (Height/Weight Measurement)*

The value reflects the percentile for the given height measurement and the age of the participant on the date that the height/weight measurements were taken. This value will only print if the WIC Category of the participant is either Infant or Child.

#### 9.36.1.15.1 Origin of Data Element

The value will be determined using the formula supplied by the Center for Disease Control and Prevention (CDC) and the following information:

- Date-Of-Birth attribute of the MEMBER entity
- Cert-WIC-Status of the CERT-CONTACT entity
- Measurement-Date, Length-Inches and Length-Eighth attributes of the ANTHROP-CONTACT entity

#### 9.36.1.15.2 Format

The value will print in ###.#% format if the WIC Category of the participant is either Infant or Child. Nothing will print if the WIC Category of the participant is any other value.

### *9.36.1.16 Weight (Height/Weight Measurement)*

This value will be the weight of the participant in pounds and ounces.

#### 9.36.1.16.1 Origin of Data Element

The value will be taken from the Weight-Pounds and Weight-Ounces attributes of the ANTHROP-CONTACT entity.

#### 9.36.1.16.2 Format

The value will print in a concatenated format of measurements and literals. For example, "147 pounds and 3 ounces" would be derived from 147 and 3 respectively in the Weight-Pounds and Weight-Ounces attributes.

### *9.36.1.17 Weight for Age Percentile (Height/Weight Measurement)*

The value reflects the percentile for the given weight measurement and the age of the participant on the date that the height/weight measurements were taken. This value will only print if the WIC Category of the participant is either Infant or Child.

#### 9.36.1.17.1 Origin of Data Element

The value will be determined using the formula supplied by the Center for Disease Control and Prevention (CDC) and the following information:

- Date-Of-Birth attribute of the MEMBER entity
- Cert-WIC-Status of the CERT-CONTACT entity
- Measurement-Date, Weight-Pounds and Weight-Ounces attributes of the ANTHROP-CONTACT entity

#### 9.36.1.17.2 Format

The value will print in ###.#% format if the WIC Category of the participant is either Infant or Child. Nothing will print if the WIC Category of the participant is any other value.

### *9.36.1.18 Weight for Stature Percentile (W/S%)*

The value reflects the percentile for the given weight and height measurements on the date that the height/weight measurements were taken. This value will only print if the WIC Category of the participant is either Infant or Child.

#### 9.36.1.18.1 Origin of Data Element

The value will be determined using the formula supplied by the Center for Disease Control and Prevention (CDC) and the following information:

- Date-Of-Birth attribute of the MEMBER entity
- Cert-WIC-Status of the CERT-CONTACT entity
- Measurement-Date, Weight-Pounds, Weight-Ounces, Length-Inches and Length-Eighth attributes of the ANTHROP-CONTACT entity

#### 9.36.1.18.2 Format

The value will print in ###.#% format if the WIC Category of the participant is either Infant or Child. Nothing will print if the WIC Category of the participant is any other value.

### *9.36.1.19 Body Mass Index (BMI)*

This value will be the body mass index for the height/weight measurements. It is only calculated if the participant was 2 years of age or older on the date that the height/weight measurements were taken.

#### 9.36.1.19.1 Origin of Data Element

The value will be calculated based on the following information:

- Date-Of-Birth attribute of the MEMBER entity
- Measurement-Date, Length-Inches, Length-Eighth, Weight-Pounds and Weight-Ounces attributes of the ANTHROP-CONTACT entity

#### 9.36.1.19.2 Format

The value will print in ##.# format if the participant is a woman or a Child who is 2 years old or older. Nothing will print if the participant is an Infant or a Child who is under 2 years old.

### *9.36.1.20 Body Mass Index Percentile (BMI%)*

The value reflects the percentile for the BMI of the participant on the date that the height/weight measurements were taken. This value will only print if the WIC Category of the participant is either Infant or Child.

#### 9.36.1.20.1 Origin of Data Element

The value will be determined using the formula supplied by the Center for Disease Control and Prevention (CDC) and the following information:

- Date-Of-Birth attribute of the MEMBER entity
- Measurement-Date, Length-Inches, Length-Eighth, Weight-Pounds and Weight-Ounces attributes of the ANTHROP-CONTACT entity

#### 9.36.1.20.2 Format

The value will print in ###.#% format if the participant is a woman or a Child who is 2 years old or older. Nothing will print if the participant is an Infant or a Child who is under 2 years old.

### *9.36.1.21 Date (Blood Work)*

This value will be the date that blood work was completed for the participant.

#### 9.36.1.21.1 Origin of Data Element

The value will be taken from the Result-Date attribute of the BLOOD-WORK entity.

#### 9.36.1.21.2 Format

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

### *9.36.1.22 Hemoglobin Measure of Blood (HGB)*

This value will be the current hemoglobin value of the participant blood.

#### 9.36.1.22.1 Origin of Data Element

The value will be taken from the Hemoglobin attribute of the BLOOD-WORK entity.

#### 9.36.1.22.2 Format

The value will print in ##.# format.

### *9.36.1.23 Hematocrit Measure of Blood (HCT)*

This value will be the current hematocrit value of the participant blood.

#### 9.36.1.23.1 Origin of Data Element

The value will be taken from the Hematocrit attribute of the BLOOD-WORK entity.

#### 9.36.1.23.2 Format

The value will print in ##.# format.

### *9.36.1.24 Lead Measure of Blood (Lead)*

This value will be the current lead measure value of the participant blood.

#### 9.36.1.24.1 Origin of Data Element

The value will be taken from the Lead attribute of the BLOOD-WORK entity.

#### 9.36.1.24.2 Format

The value will print in ### format.

### *9.36.1.25 E.P. Measure of Blood (E.P.)*

The value reflects the current E.P. measure value of the participant blood.

#### 9.36.1.25.1 Origin of Data Element

The value will be taken from the EP attribute of the BLOOD-WORK entity.

#### 9.36.1.25.2 Format

The value will print in ### format.

### *9.36.1.26 Reason Not Collected*

This value will be the reason why the blood work measurements are not yet available for the participant.

#### 9.36.1.26.1 Origin of Data Element

The value will be taken from the textual lookup value of the Exception-Reason attribute of the BLOOD-WORK entity.

#### 9.36.1.26.2 Format

The value will print as its literal value.

### *9.36.1.27 Risk Factor*

This value will be the risk factor assigned to the participant. Risk factors may be system assigned or manually assigned.

#### 9.36.1.27.1 Origin of Data Element

The value will be taken from the textual lookup value of the Risk-Factor-ID attribute of the RISK-FACTOR entity.

#### 9.36.1.27.2 Format

The value will print as its literal value. The Risk-Factor-Code attribute is appended to the description text.

### *9.36.1.28 High Risk Warning Value Label*

This value label will indicate that the participant is considered to be high risk.

#### 9.36.1.28.1 Origin of Data Element

The value label will contain the text "(High Risk)" when the participant is marked as high risk. It will reflect the value in the High-Risk attribute of the MEMBER entity.

#### 9.36.1.28.2 Format

The value will print as its literal value.

### *9.36.1.29 Date (Food Package)*

This value is the date that the food item was prescribed.

#### 9.36.1.29.1 Origin of Data Element

The value will be taken from the Prescription-Date attribute of the FOOD-PRESCRIPTION-ITEM entity.

#### 9.36.1.29.2 Format

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

### *9.36.1.30 Food Prescription Quantity*

This value will be the quantity of the food item prescribed.

#### 9.36.1.30.1 Origin of Data Element

The value will be taken from the Item-Quantity attribute of the FOOD-PRESCRIPTION-ITEM entity.

#### 9.36.1.30.2 Format

The value will print in ## format.

### *9.36.1.31 Food Description*

This value will be the description of the food item prescribed to the participant.

#### 9.36.1.31.1 Origin of Data Element

The value will be taken from the textual lookup value of the Food-Prescription-Item attribute of the FOOD-PRESCRIPTION-ITEM entity.

#### 9.36.1.31.2 Format

The value will print as its literal value.

### *9.36.1.32 Date (Group Nutrition Education Topics)*

This value will be the date when the education was conducted.

#### 9.36.1.32.1 Origin of Data Element

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

#### 9.36.1.32.2 Format

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

### *9.36.1.33 Topic*

This value will be the topic of the education conducted.

#### 9.36.1.33.1 Origin of Data Element

The value will be taken from the textual lookup value of the Topic attribute of the EDUCATION-CONTACT entity.

#### 9.36.1.33.2 Format

The value will print as its literal value.

### *9.36.1.34 First Use Date (Food Instrument)*

This value will be the first date that the set of food instrument can be used by the participant.

#### 9.36.1.34.1 Origin of Data Element

The value will be taken from the First-Use-Date attribute of the FOOD-INSTRUMENT-SET entity.

#### 9.36.1.34.2 Format

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

### *9.36.1.35 Last Use Date (Food Instrument)*

This value will be the last date that the set of food instrument can be used by the participant.

#### 9.36.1.35.1 Origin of Data Element

The value will be taken from the Last-Use-Date attribute of the FOOD-INSTRUMENT-SET entity.

#### 9.36.1.35.2 Format

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

### *9.36.1.36 Number of Checks Issued (Nbr Chks Issued)*

This value will be the number of instruments received by the participant in the set of food instruments.

#### 9.36.1.36.1 Origin of Data Element

The value will be an aggregate count of the number of FOOD-INSTRUMENT entities associated with the FOOD-INSTRUMENT-SET entity.

#### 9.36.1.36.2 Format

The value will print in ### format.

## 9.36.2 Filter Criteria

### *9.36.2.1 Selected Participant*

Only information for the selected participant will be included in the report.

### *9.36.2.2 Certification Period*

Only height/weight measurements, blood work results, food packages, education and food instruments that occurred within the selected certification period will be included in the report.

### *9.36.2.3 Valid Food Instruments*

Only food instruments that were issued and not voided or reported stolen will be included in the report.

## 9.36.3 Sort Order

### *9.36.3.1 Date*

The components within each section of the report will be sorted by date.

### *9.37 View Program Abuses*

The View Program Abuses dialog allows the user to view and add program abuses for the currently selected member. The View Program Abuses dialog is invoked when the user selects View Program Abuses menu option on the Participant Folder Activities menu.

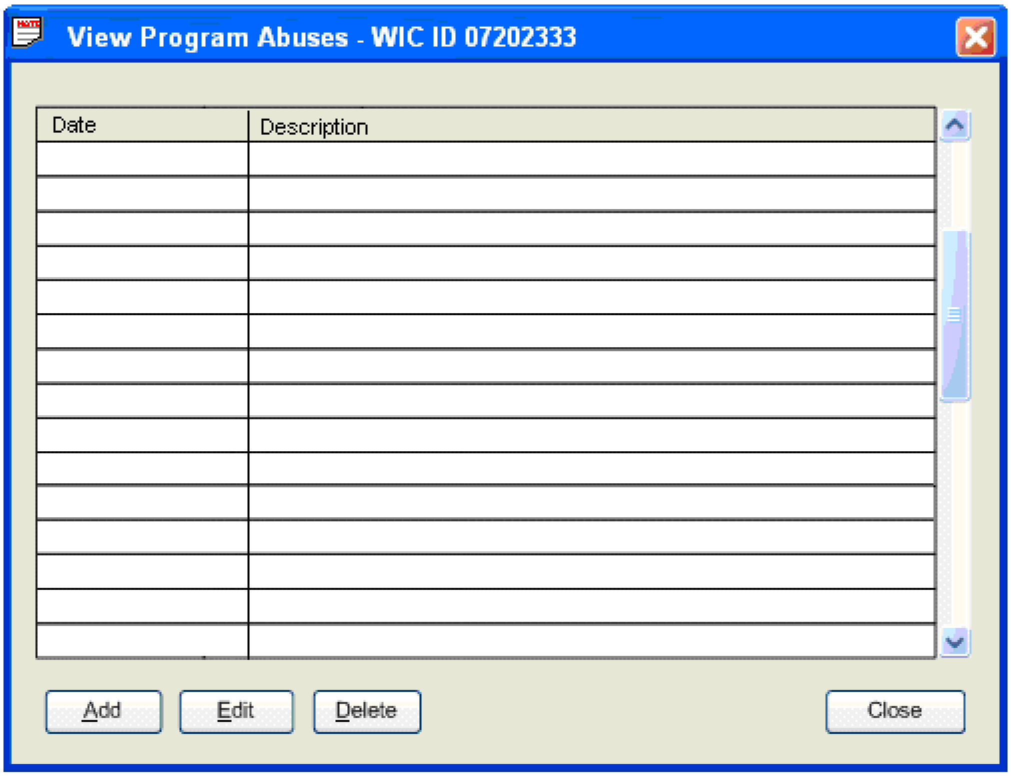



**Figure 39 - View Program Abuses Dialog**

#### 9.37.1 Controls

This section describes the behavior of the controls on the View Program Abuses dialog.

##### *9.37.1.1 Member's Program Abuses List Grid*

This control allows the user to view the member's program abuses. The grid will consist of the following columns:

- Date
- Abuse Description

The grid will contain an entry for each program abuse that was recorded for the participant from the ProgramAbuse table. The entries will be sorted in descending order according to the value of the Abuse Date and then ascending order according to the abuse description. The data in the grid is read-only.

#### *9.37.1.2 Add Button*

This control allows the user to add an abuse for the currently selected member. The Add button will be enabled when the View Program Abuses dialog is active. It has a mnemonic of “A”.

Upon selection of the button, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Participant.Add or FullControl) to add an abuse for the member, the system will invoke a standard error message with the text “You do not have the necessary permissions to add an abuse. Please see the supervisor.”

#### *9.37.1.3 Edit Button*

This control allows the user to update information about the abuse selected on the abuse display grid. The Edit button will be enabled when an abuse is selected on the abuse display grid. It has mnemonic of “E”.

Upon selection of the button, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (participant.FullControl) to edit an abuse for the member, the system will invoke a standard error message with the text “You do not have the necessary permissions to edit an abuse. Please see the supervisor.”

#### *9.37.1.4 Delete Button*

This control allows the user to delete the abuse selected on the abuse display grid. The Delete button will be enabled when an abuse is selected on the abuse display grid. It has a mnemonic of “D”.

Upon selection of the button, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Participant.FullControl) to delete an abuse for the member, the system will invoke a standard error message with the text “You do not have the necessary permissions to delete an abuse. Please see the supervisor.”

#### *9.37.1.5 Close Button*

This control allows the user to exit the View Program Abuses List for dialog. The Close button will be enabled when the abuse List for dialog is active. Characteristics for the Close button are defined in *Consistencies*.

### 9.37.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the View Program Abuses List for dialog.

#### *9.37.2.1 Initializing the Interface*

Upon initial display of the dialog, the title bar text will be set to "View Program Abuses"

The Program Abuses grid will display abuses for the selected member if the user has the appropriate permissions. The system will check the permissions for the currently logged-on user. If the user does not have the appropriate permissions to Participant.View, Add or FullControl then permission is denied.

#### *9.37.2.2 Add Abuse*

Upon selection of the Add button, the system will invoke the Update Abuse dialog in Add mode.

#### *9.37.2.3 Edit Abuse*

Upon selection of the Edit button, the system will invoke the Edit Abuse dialog in Edit mode.

#### *9.37.2.4 Delete Abuse*

Upon selection of the Delete Abuse button, the system will invoke a standard warning message with the text "Are you sure you want to delete this abuse?" The options of Yes and No will be available. If the user selects Yes, the system will delete the abuse selected on the Abuse display grid and update the contents of the grid. If the user selects No, the system will return to the View Program Abuses dialog without deleting the abuse.

#### *9.37.2.5 Close Button*

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

### *9.38 Update Abuse*

The Update Abuse dialog allows the user to add an abuse to a member, or edit the abuse selected on the Abuse display grid of the View Program Abuses dialog. The Update Abuse dialog is invoked in response to the following user actions:

- Selection of the Add button on the View Program Abuses dialog described in this document.
- Selection of the Edit button on the View Program Abuses dialog described in this document.

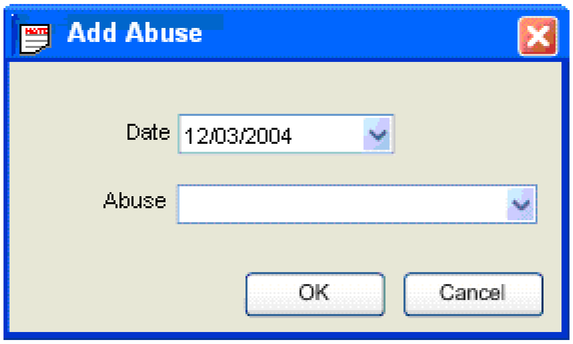



**Figure 40 - Add Abuse Dialog**


**Figure 41 - Edit Abuse Dialog**

If this dialog was invoked from the Add button of the View Program Abuses dialog, it is considered to be in Add mode. If the dialog was invoked from the Edit button of the View Program Abuses dialog, it is considered to be in Edit mode.

#### 9.38.1 Controls

This section describes the behavior of the controls on the Update Abuse dialog.

#### *9.38.1.1 Date Control Box*

This control allows the user to enter the date on which the program abuse was incurred by the member. The date control will be enabled when the Update Abuse dialog is active. The date control box will only accept entry of numeric digits. The mask on the box will be "##/##/####" to accept a date with a four digit year. If the dialog is in Add mode, it will default to the current system date. If the dialog is in Edit mode, the control will be populated with the value of the entry selected on the Abuse display grid on the View Program Abuses dialog.

#### *9.38.1.2 Abuse Dropdown Box*

This control allows the user to select the abuse. The control will be enabled when the Update Abuse dialog is active. If the dialog is in Add mode, the control will initially be blank. If the dialog is in Edit mode, the control will be populated with the value of the entry selected on the Abuse display grid on the View Program Abuses dialog. It will be loaded with the descriptions from the ReferenceDictionary for 'WICPGMABUSE'.

#### *9.38.1.3 OK Button*

This control allows the user to save the abuse information and exit the Update Abuse dialog. The OK button will be enabled when the Update Abuse dialog is active. Characteristics for the OK button are defined in *Consistencies*.

#### *9.38.1.4 Cancel Button*

This control allows the user to discard any changes made to the abuse and exit the Update Abuse dialog. The Cancel button will be enabled when the Update Abuse dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 9.38.2 Processes

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

#### *9.38.2.1 Edit for Required Entry in Controls*

Upon selection of the OK button, the system will check that values have been entered in the following controls:

- Date control box

If an entry is not made in an above-listed control, the system will invoke a standard error message with the text "An entry is required for the {descriptive name of value represented by control}".

- Abuse dropdown box

If a selection is not made in an above-listed control, the system will invoke a standard error message with the text "A selection is required for the {descriptive name of value represented by control}".

### *9.38.2.2 Edit for Legitimate Values in Controls*

Upon successful completion of the above-listed edits, the system will check that the values entered into the controls are considered legitimate as follows:

- The date value entered in the Date masked edit box must be equal to or greater than the current system date.

### *9.38.2.3 Perform Cross-Edits for Values in Controls*

No controls on the Update Abuse dialog participate in cross-edits.

### *9.38.2.4 Save Values*

Upon successful completion of the above-listed edits, the system will save the abuse information to the database. If the dialog is in Add mode, the system will add a record to the Abuse display grid on the View Program Abuse dialog. If the dialog is in Edit mode, the system will update the currently selected record on the Abuse display grid on the View Program Abuse dialog. The system will then return to the View Program Abuse dialog.

### *9.38.2.5 Data Map*

| **Control Label** | **Entity** | **Attribute** | **Business Rule** |
|---|---|---|---|
| | ProgramAbuse | StateWICID | |
| Date | ProgramAbuse | AbuseDate | |
| Abuse | ProgramAbuse | AbuseCd | |
| | | | |