11. Food Instrument Production and Processing

This functionality of the WIC System allows the user to create food instruments for the participant, void food instruments, mark food instruments as stolen, and optionally replace the food instruments.

11.1 Issue Checks (Checks Tab)

The Checks tab of the Issue Checks dialog allows the user to select the sets of checks to be produced for the participants of the household. It is invoked in response to the following user actions:

- Selection of the Issue Checks menu item from the Check Management menu described in *Chapter 9 – Participant Folder*.
- Selection of the Issue Checks toolbar button from the Participant Folder toolbar described in *Chapter 9 – Participant Folder*
- Selection of the Issue Checks menu item from the Guided Script menu described in *Chapter 10 – Certification Guided Script*.
- Selection of the Issue Checks button on the Certification Guided Script dialog described in *Chapter 10 – Certification Guided Script*
- Selection of the Checks tab on the Issue Checks dialog described in this document.

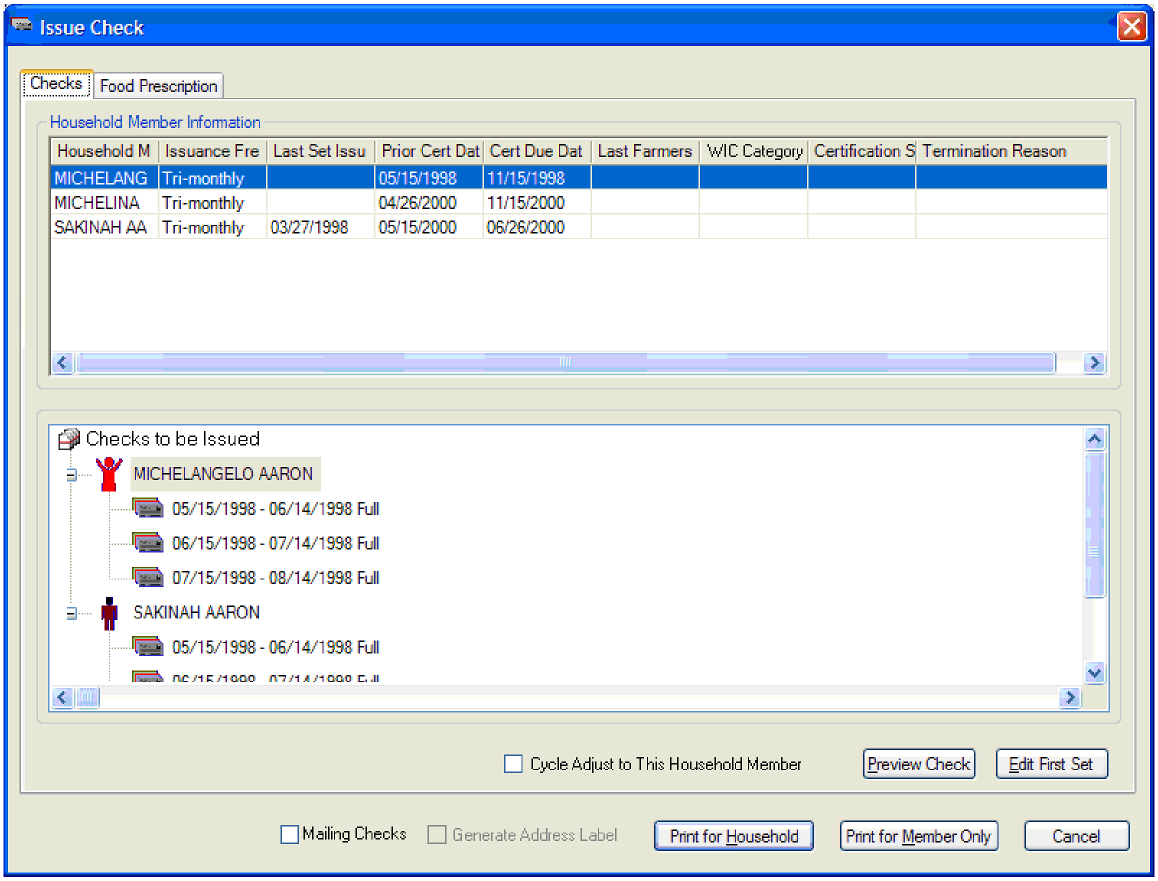

Figure 1 - Issue Checks Dialog (Checks Tab)

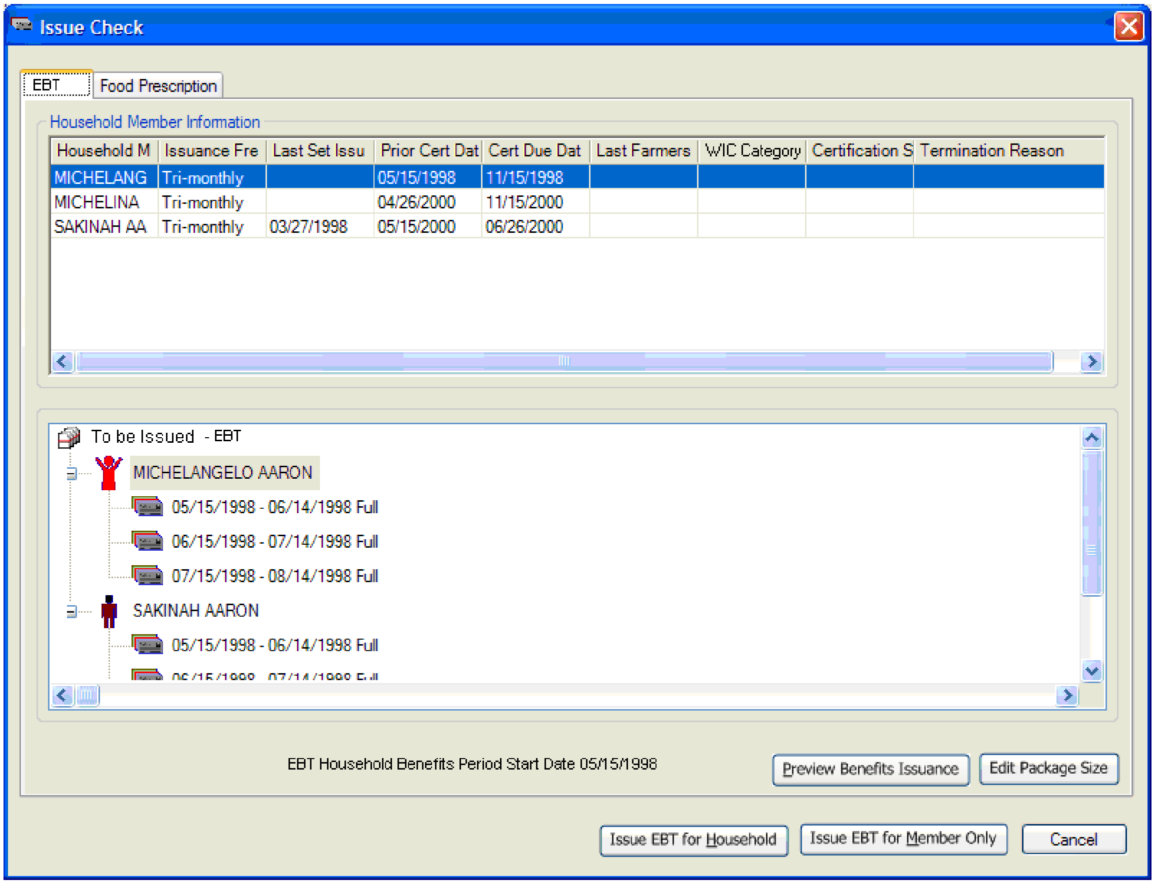

Figure 2 - Issue Checks Dialog (EBT Tab)

11.1.1 Controls

This section describes the behavior of the controls on the Checks tab of the Issue Checks dialog.

11.1.1.1 Household Participant Display Grid

This control allows the user to view information about the participants of the household that will assist in issuing checks. The display grid will be enabled when the Checks tab is active. It consists of the following columns:

- Household Participant
- Issuance Frequency
- Last Set Issued Date (Last Set Issued)
- Prior Certification Date (Prior Cert Date)
- Certification Due Date (Cert Due Date)
- Categorical Ineligibility Date
- WIC Category
- Termination Reason

An entry will be added to the grid for each participant of the household. The grid will be sorted alphabetically by the value of the Household Participant column. The values on the grid are read-only.

11.1.1.2 Checks to be Issued Tree View

This control allows the user to view the household participants who will be receiving checks and the set(s) of checks to be issued to each participant. The tree view will be enabled when the Checks tab is active. It consists of the following hierarchical structure:

```
Checks to be Issued Root
|
|_ Household Participant Node
    |
    |__Set of Checks Node
    |__Set of Checks Node
```

It will be filled with all household participants in the same location who are currently eligible to receive checks and the set(s) of checks to be received by each participant. The Household Participant tree view node of the base participant will initially be selected.

The defaults for the tree view will take into account the following factors:

- Cycle Adjustment - The system will suggest sets of checks such that the participants of the household will pick up checks at the same time.
- Issuance Frequency - The system will suggest the number of sets of checks for a household participant according to the issuance frequency specified by the CPA in the CPA-Determined Follow-up dialog described in Chapter O - CPA Determined Follow-up. The system will automatically limit the participant to one (1) set of checks if their Proof of Residency, Proof of ID or Proof of Income is still pending and they are not homeless.
- Late Pickup - The system will adjust the package size for the first set of checks for the affected household participants if the household participant is late in picking up checks.
- Certification End Date - The system will not suggest checks past the end of the month of the current certification period for the household participant.
- Previous Issuance - The system will not suggest sets of checks to print for a participation month in which the household participant has already received a set of checks.

The global steps necessary to suggest the correct sets of checks to print for the household are as follows:

- Identify the base participant (the household participant to whom the system will cycle adjust)
- Determine sets of checks to issue for base participant
- Cycle adjust other household participants according to the sets of checks to be issued for the base participant
- Prorate package sizes based on cycle adjusted sets (which the user can override)

Each step is described in detail below.

11.1.1.2.1 Identify the Base Participant

The system will attempt to determine the participant who has the longest continuous participation on the WIC program by checking the certification records for the participant. There may not be any gaps between the end date of one certification and the beginning date of the next certification period to count as a continuous certification. The participant with the longest continuous certification is considered the base participant, unless that participant will be categorically ineligible at the time of issuance of the first set of checks. In this case, the system will check for the next longest certification. This algorithm is repeated until the base participant is found.

If all household participants have equal lengths of continuous certifications, or the system does not have adequate information due to in-state or out-of-state transfers, the system will determine the base participant according to the following rules:

- The system will start with the oldest infant or child in the household whose certification end date is greater than the current system date.
- If this participant will be categorically ineligible before the end of the current certification, the system will skip to the next oldest household participant.
- If the participant has not yet received checks for the current participation month, the system will determine the first date to use for the first set of checks for the participant. If this date is past the certification end date for the current certification of the participant, the system will skip to the next oldest household participant.
- The resulting participant is the base participant.

11.1.1.2.2 Determine Set of Checks to Issue for Base Participant

The following steps will be performed to determine the sets of checks that should be issued to the base participant:

If the certification period of the base participant ends before any checks would be generated according to following steps, no sets of checks will be suggested for any household participant.

If no previous checks are present for the current certification period for the base participant, both the expected and actual first date to use for the first set of checks will be the current system date. The last date to use for the first set of checks will be the number of days in the current month after the first date to use.

If two sets of checks are issued and outstanding for the participant (two sets with a first date to use greater than the current system date), no sets of checks will be suggested.

If previous checks are present for the current certification period, the expected first date to use is one day after the last date to use for the last set of checks issued for the current certification period. The actual first date to use is the later of the expected first date to use or the current system date. The last date to use for the first set of checks will be the number of days in the current month after the expected first date to use.

If the last date to use is before the current system date, the expected first date to use becomes one day after the last date to use. The new last date to use will be the number of days in the current month after the expected first date to use. This algorithm will be repeated until the last date to use is greater than the current system date.

Once the first set of checks has been determined, the system will suggest up to two additional sets of checks with adjoining first date to use and last date to use until one of the following conditions exist:

- The first date to use is greater than the termination date for the current certification.
- The first date to use is greater than the certification end date for the current certification.
- The last date to use is greater than six (6) weeks past the expected delivery date (if the participant is a pregnant woman)
- The number of sets to be issued is equal to or less than the issuance frequency for the participant (1, 2, or 3 months).
- The number of sets to be issued is one (1), the participant is not homeless, and their Proof of Residency, Proof of ID or Proof of Income is still pending.

11.1.1.2.3 Cycle Adjustment of Household Participants

Once the first set of checks has been determined for the base participant, the system will determine the sets of checks to be issued for each additional household participant as follows:

The system will determine the first set of checks to be issued for the household participant according to the rules specified above for the base participant.

The system will then search for the most recent historical or suggested issuance for the base participant where the actual first date to use is less than or equal to the actual first date to use for the current participant. The system will set the last date to use for the current participant to the same date as the last date to use for the base participant.

Once the first set of checks has been determined, the system will suggest up to two additional sets of checks with adjoining first date to use and last date to use until one of the following conditions exist:

- The first date to use is greater than the termination date for the current certification.
- The first date to use is greater than the certification end date for the current certification.
- The last date to use is greater than six (6) weeks past the expected delivery date (if the participant is a pregnant woman)
- The number of sets to be issued is equal to or less than the issuance frequency for the participant (1, 2, or 3 months).
- The first date to use for the set is greater than the first date to use for the last set suggested for the base participant.
- The number of sets to be issued is one (1), the participant is not homeless, and their Proof of Residency, Proof of ID or Proof of Income is still pending.

11.1.1.2.4 Create Partial Month Issuance Based on Cycle-Adjusted Sets

Once sets of checks have been suggested for each household participant, the system will determine the prorating of package sizes for the first set of checks for each household participant according to the following:

The system will calculate the number of days between the actual first date to use and the last date to use for the set of checks.

For women and children, the following chart shows the partial month issuance for milk and juice:

Number of Days between Actual First Date to Use and Last Date to Use (inclusive)	Food Package Size
1 - 7	¼ package
8 – 15	½ package
16 – 23	¾ package
24 – 31	Full package

For infants, the following chart shows the partial month issuance for formula:

Number of Days between Actual First Date to Use and Last Date to Use (inclusive)	Food Package Size
1 – 7	½ package
8 - 15	¾ package
16 – 31	Full package

The user can override the proration of the first set of checks using the Edit First Set of Checks dialog described in this document. This dialog is invoked when the user selects the Edit First Set Button on this dialog.

11.1.1.3 Household Participant Tree View Node

This node of the Checks to be Issued tree view allows the user to view the household participant receiving checks. The node will consist of an appropriate icon and text in the format of {First Name Middle Initial Last Name}. The Household Participant tree view nodes will be sorted in alphabetical order by last name then by first name. All of the Household Participant tree view nodes will be expanded. If the household participant is considered to be the base participant for cycle adjustment, the icon for their Household Participant tree view node will be different.

11.1.1.4 Set of Checks Tree View Node

This node of the Checks to be Issued tree view allows the user to view the set of checks to be issued to the household participant. The node will consist of an appropriate icon and text in the format of {(first date to use) (last date to use) (package size indicator [FULL, ¾, ½, ¼])}. The Set of Checks tree view nodes are sorted in chronological order by the first date to use.

11.1.1.5 Cycle Adjust to This Household Participant Check Box

This control allows the user to change the system-suggested base participant for cycle adjustment to another household participant. The check box will be enabled when a Household Participant tree view node is selected for a household participant that is not currently the base participant.

Upon marking the check box, the system will change the icon of the Household Participant tree view node to indicate that the selected household participant is now the base participant. The icon of the previous base participant will revert to the appropriate icon. The system will then recalculate check issuance defaults based on the new base participant and refresh the contents of the Checks to be Issued tree view.

11.1.1.6 Preview Check Button

This control allows the user to preview the set of checks to be issued to the household participant. The Preview Check button will be enabled when a Set of Checks tree view node for a Household Participant tree view node is selected. It has a mnemonic of “P”.

11.1.1.7 Edit First Set Button

This control allows the user to alter the first date to use and the package size of the first set of checks to be issued to the household participant. The Edit First Set button will be enabled when the first Set of Checks tree view node for a Household Participant tree view node is selected. It has a mnemonic of “E”.

11.1.1.8 Mailing Checks Check Box

This control allows the user to indicate that the issued checks will be mailed to the household of the participant. The check box will be enabled when the Issue Checks dialog is active. It will initially be unchecked.

11.1.1.9 Generate Address Label Check Box

This control allows the user to specify that an address label should be produced for the household of the participant. The check box will be enabled when the Mailing Checks check box is marked. It will initially be disabled and unchecked.

11.1.1.10 Print for Household Button

This control allows the user to instruct the system to edit the values of the controls, print the indicated sets of checks for the household, and exit the Issue Checks dialog. The Print for Household button will be enabled when a WIC check queue is selected for the workstation and checks exist in the Set of Checks tree view. If no checks exist to print or if no check printer is defined, the button will be disabled. It has a mnemonic of “H” and is the default button for the dialog.

11.1.1.11 Print for Member Only Button

This control allows the user to instruct the system to edit the values of the controls, print the indicated sets of checks for the selected household participant, and exit the Issue Checks dialog. The Print for Member Only button will be enabled when a WIC check printer is specified in System Tools and a Participant is selected in the Set of Checks tree view. If no checks exist to print, the button will be disabled. It has a mnemonic of “M”.

11.1.1.12 Cancel Button

This control allows the user to exit the Issue Checks dialog without producing any checks. The Cancel button will be enabled when the Issue Checks dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.1.2 Processes

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

11.1.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to “Issue Check”

The Checks tab will be the default tab

The Household Member Information will display all participants within the selected Household in the same location. It is possible for members of the household to be assigned to different locations (agency and service site) for WIC program services and food benefits.

The Checks to be Issued Tree View will be filled with all household participants who are currently eligible to receive checks and the set(s) of checks to be received by each participant.

The Cycle Adjust to This Household Participant check box will be initially disabled and blank.

The Mailing checks check box will be initially blank.

The Generate Address Label check box will be initially disabled and blank.

11.1.2.2 Edits

There are no edits defined for this dialog.

11.1.2.3 Printing Checks

Upon selection of the Print for Member Only button the system will send the printing instructions for the check sets for the selected participant to the Check printer queue designated in System Tools.

Upon selection of the Print for Household button, the system will send printing instructions for the check sets for all Household members with checks listed in the Set of Checks tree view to the Check printer queue designated in System Tools.

After the checks have printed the system will proceed as follows:

- If the Generate Address Label check box is checked, the system will invoke the Generate Address Label for Checks dialog described in this document. When that dialog is complete the system will proceed to the next step.
- If an authorized signature is required for the issued checks, the system will invoke the Capture Electronic Signature dialog described in this document. When that dialog is complete the system will proceed to the next step.
- The system will check to see if the participant had an appointment scheduled for that date of issuance, and if the participant had an appointment scheduled, the appointment will be marked as kept. For more information on the process, see Chapter 06 - Search-Selection, Section 6.1.4.3 Mark Appointment as Kept.
- The system will return to the calling window.

11.1.2.4 Preview Check

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

11.1.2.5 Edit First Set

Upon selection of the Edit First Set button, the system will invoke the Edit First Set of Checks dialog described in this document.

11.1.2.6 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without printing checks and will return to the calling window.

11.2 Preview Checks

The Preview Checks dialog allows the user to view the checks that will be issued prior to actual printing. The check number and MICR check line will not be displayed in the report viewer. The Preview Checks dialog is invoked when the user selects the Preview Checks button on the Issue Checks dialog.

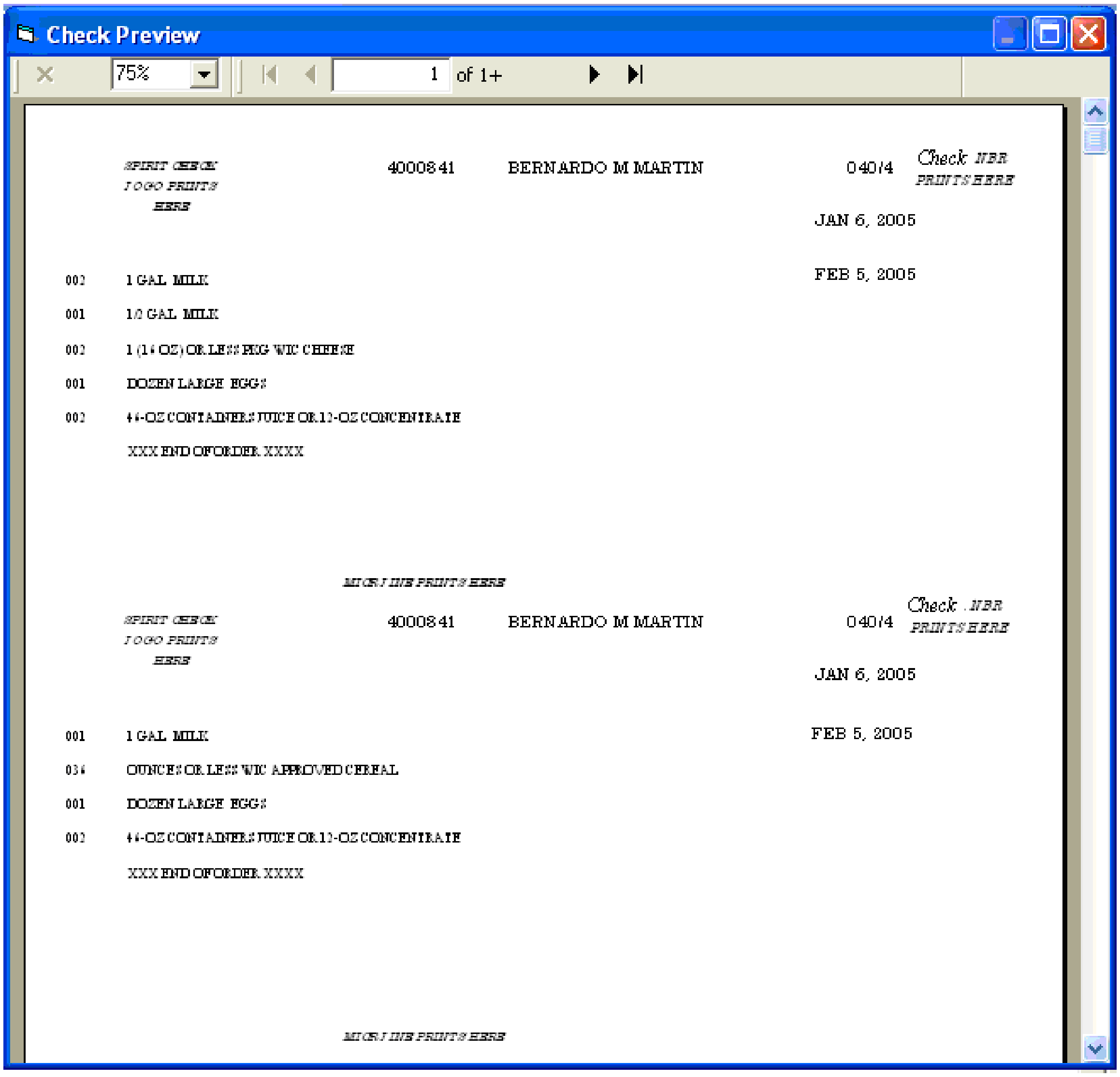

Figure 3 – Check Preview Dialog

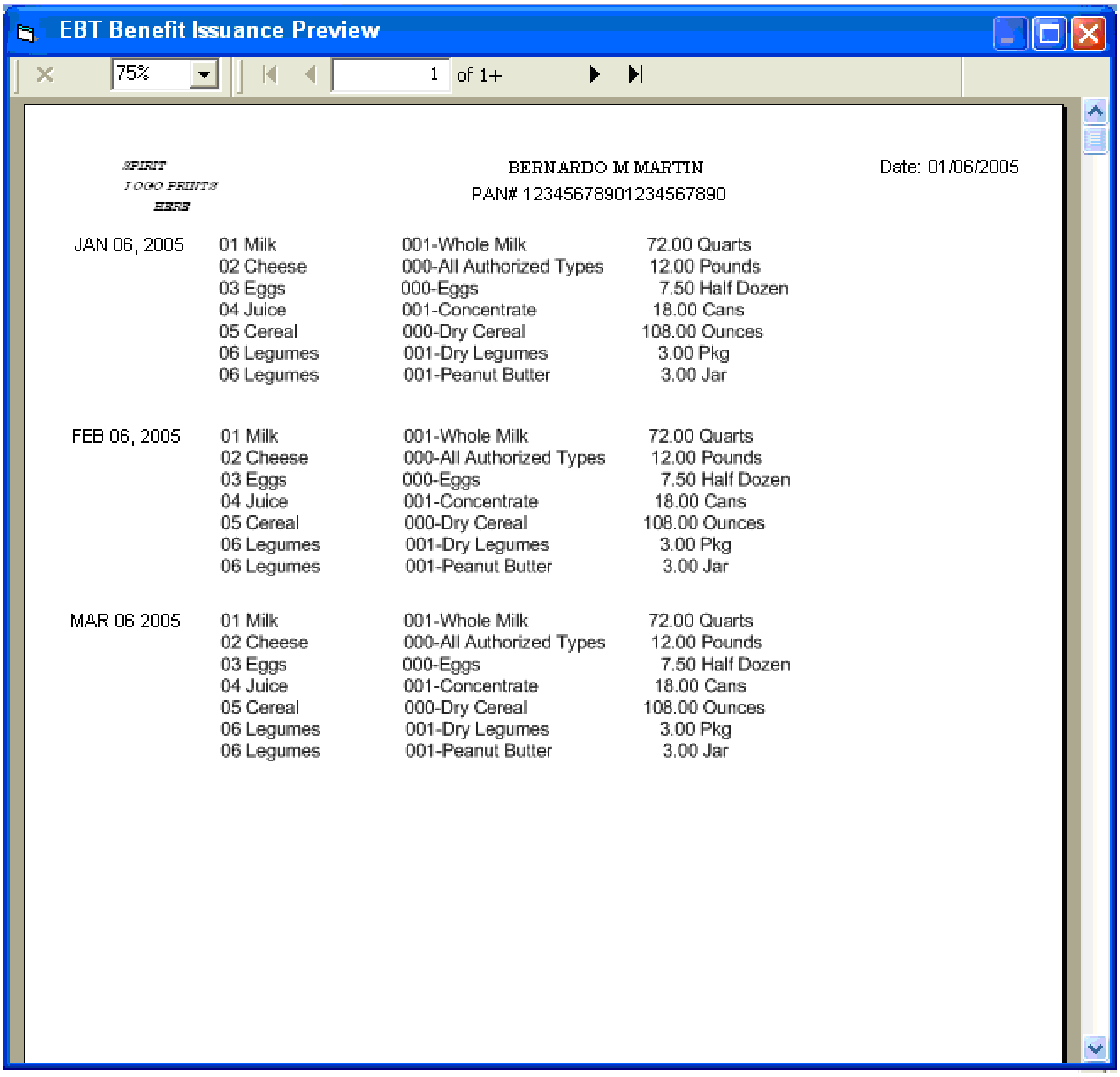

Figure 4 – EBT Benefits Preview Dialog

11.2.1 Controls

The checks are displayed using the report viewer.

11.2.1.1 Check Logo

The check logo will display.

11.2.1.2 Participant State WIC ID

The participant's state WIC ID will display.

11.2.1.3 Participant Name

The participant's full name will display.

11.2.1.4 ITO Agency Number / Clinic Number

The ITO Agency / Clinic numbers will display.

11.2.1.5 First Date to Use

The first date to use the check will display.

11.2.1.6 Last Date to Use

The last date to use the check will display.

11.2.1.7 Qty

The item quantity will display.

11.2.1.8 Item Description

The description of the item will display.

11.2.2 Processes

11.2.2.1 Initializing the Interface

Upon initial presentation of the dialog, the title bar text will be set to "Preview Checks"

The text of the first 3 checks to be printed will be automatically displayed.

If a second page of checks is available, the Next and End of Document buttons will be enabled.

11.2.2.2 Exit

Upon report viewer exit, the system will return to the Issue Checks (Checks Tab) dialog as described in this document.

11.3 Edit First Set of Checks

The Edit First Set of Checks dialog allows the user to override the system proration suggestions and edit the package size of the first set of checks to be issued. It is invoked when the user selects the Edit First Set of Checks button on the Check tab of the Issue Checks dialog described in this document.

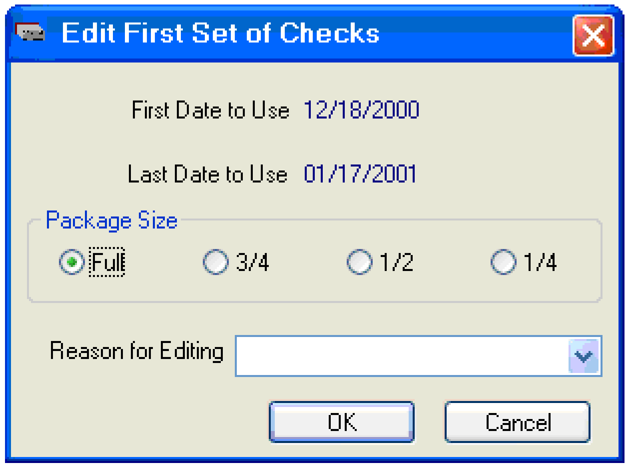

Figure 5 - Edit First Set of Checks Dialog

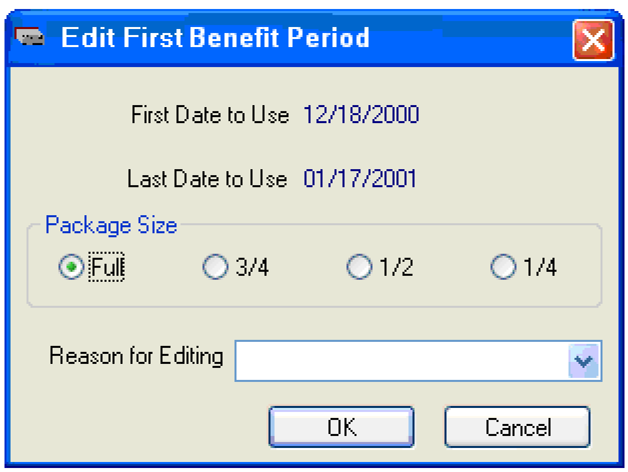

Figure 6 - Edit First Set of Checks Dialog – EBT Ready

11.3.1 Controls

This section describes the behavior of the controls on the Edit First Set of Checks dialog.

11.3.1.1 First Date to Use Text and Value Label

This control allows the user to view the first date to use of the set of checks to be issued. The value label will be filled with the first date to use for the Set of Checks tree view node selected in the Checks to be Issued tree view on the Checks tab of the Issue Checks dialog. It will display in the inverse color of the form.

11.3.1.2 Last Date to Use Text and Value Label

This control allows the user to view the last date to use of the set of checks to be issued. The value label will be filled with the last date to use for the Set of Checks tree view node selected in the Checks to be Issued tree view on the Checks tab of the Issue Checks dialog. It will display in the inverse color of the form.

11.3.1.3 Package Size Radio Button Group

This control allows the user to select the package size for the set of checks to be issued. The radio button group will be enabled if there has not been a set of checks issued to the household participant selected in the Checks to be Issued tree view on the Checks tab of the Issue Checks dialog. It consists of the following radio buttons:

- Full
- ¾
- ½
- ¼

The Full radio button will default to selected.

11.3.1.4 Reason for Editing Dropdown

This control allows the user to select the reason the first set of checks is being edited. The dropdown will be enabled when the Edit First Set of Checks dialog is active. It will be filled with a list of reasons for editing the first set of checks from the reference dictionary table of the lookup database. It will initially be blank.

11.3.1.5 OK Button

This control allows the user to instruct the system to edit the values of the controls, apply the changes to the Set of Checks tree view node, and exit the Edit First Set of Checks dialog. The OK button will be enabled when the Edit First Set of Checks dialog is active. (See *Saving the Data* in the Processing section below) Characteristics for the OK button are defined in *Consistencies*.

11.3.1.6 Cancel Button

This control allows the user to exit the Edit First Set of Checks dialog without editing the package size of the first set of checks. The Cancel button will be enabled when the Edit First Set of Checks dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.3.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Edit First Set of Checks dialog.

11.3.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to "Edit First Set of Checks"

The First Date to Use value label will be set to the first use date of the selected checks.

The Last Date to Use value label will be set to the last use date of the selected checks.

The Package Size will default to Full

The Reason for Editing dropdown will be initially blank.

11.3.2.2 Edits

Upon selection of the OK button, if the Package Size radio button group has been enabled the system will check that values have been entered in the following controls. If no selection has been made, the system will invoke a standard error message with the text "A selection is required in the {control label}":

- Package Size radio button group
- Reason for Editing dropdown

11.3.2.3 Saving the Data

Upon successful completion of the above-listed edits, the system will update the selected Set of Checks tree view node in the Checks to be Issued tree view on the Checks tab of the Issue Checks dialog with the values on the Edit First Set of Checks dialog. The system will then return to the Checks tab of the Issue Checks dialog.

11.3.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without editing the package size of the first set of checks and return to the Issue Checks dialog.

11.4 Capture Electronic Signature

The Capture Electronic Signature dialog allows the user to capture an electronic copy of the participant's signature for the WIC checks they received. It is automatically invoked by the system after checks have printed when an authorized signature is required for the issued checks.

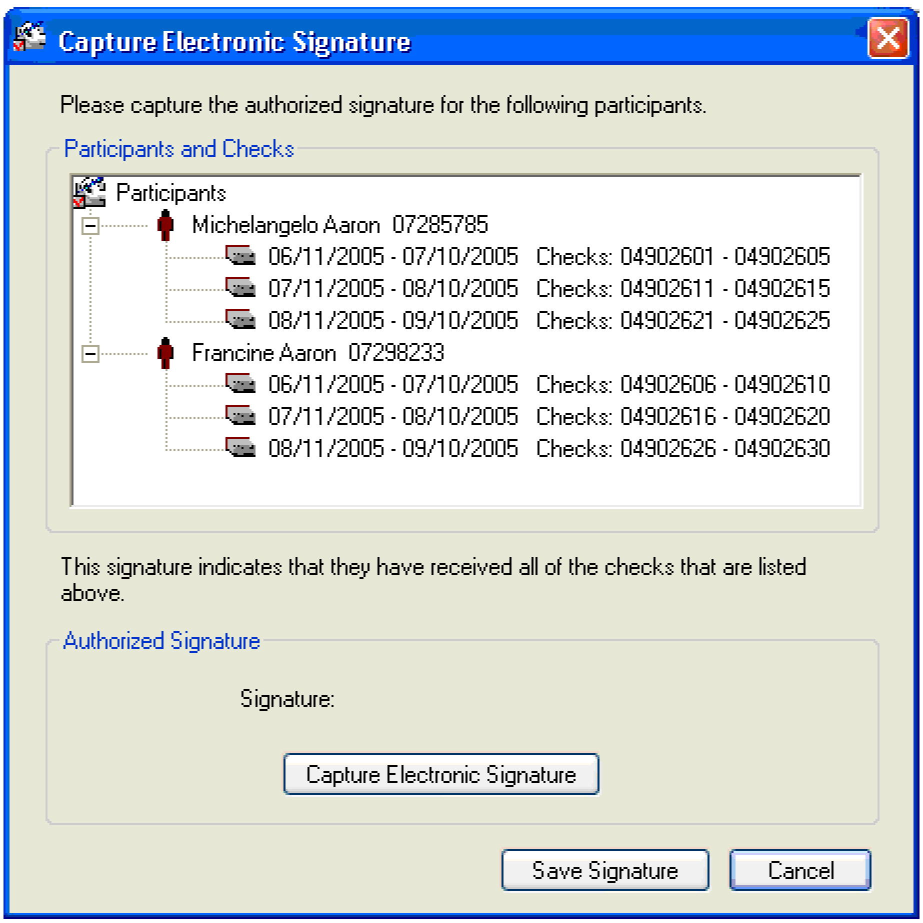

Figure 7 - Capture Electronic Signature Dialog without Signature

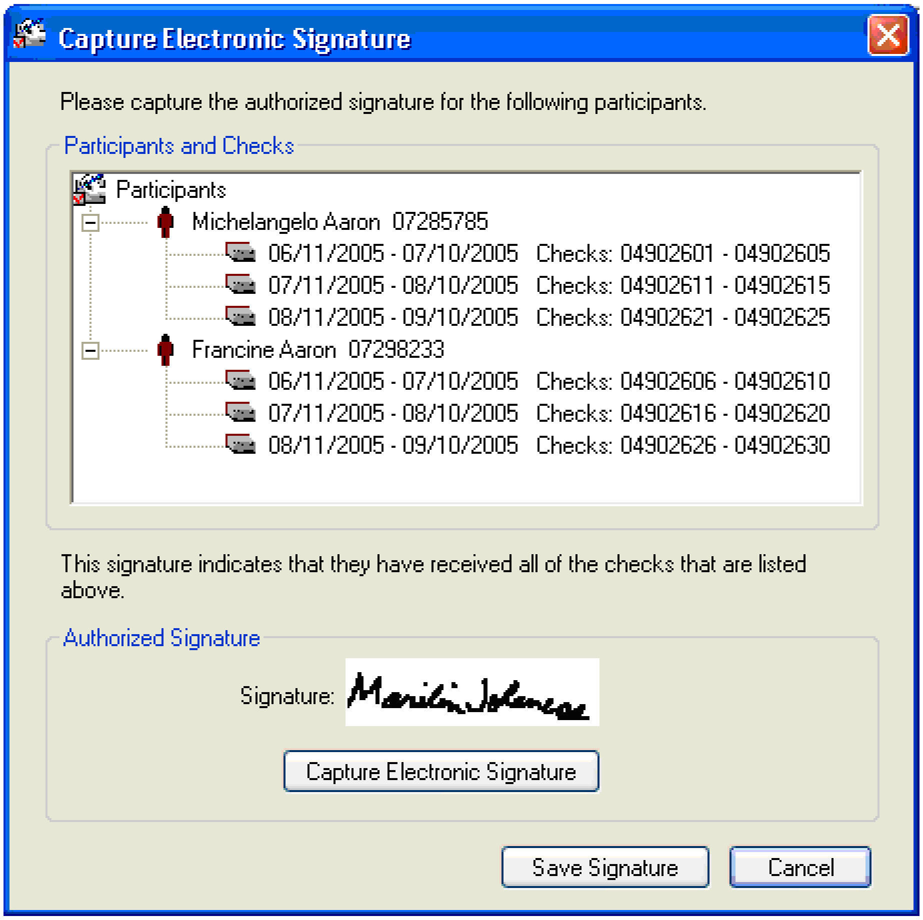

Figure 8 - Capture Electronic Signature Dialog with Signature

11.4.1 Controls

This section describes the behavior of the controls on the Capture Electronic Signature dialog.

11.4.1.1 Participants and Checks Tree View

This control allows the user to view the household participants who received checks and the set(s) of checks issued to each participant. The tree view will be enabled when the Capture Electronic Signature dialog is active. It consists of the following hierarchical structure:

```
Participants Root
|
|_ Household Participant Node
    |
    |__Set of Checks Node
    |__Set of Checks Node
```

It will be filled with all household participants who were issued checks and the set(s) of checks received by each participant. All nodes will default to expanded. The data values on the tree view will be read-only.

11.4.1.2 Household Participant Tree View Node

This node of the Participants and Checks tree view allows the user to view the household participant who received checks. The node will consist of an appropriate icon and text in the format of {First Name Middle Initial Last Name} {participant State WIC ID}. The Household Participant tree view nodes will be sorted in alphabetical order by last name then by first name. All of the Household Participant tree view nodes will be expanded.

11.4.1.3 Set of Checks Tree View Node

This node of the Participants and Checks tree view allows the user to view the set of checks that were issued to the household participant. The node will consist of an appropriate icon and text in the format of {(first date to use) (last date to use)} Checks: {first check number in set} – {last check number in set}. The Set of Checks tree view nodes are sorted in chronological order by the first date to use.

11.4.1.4 Electronic Signature Picture Box and Value Label

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

11.4.1.5 Capture Electronic Signature Button

The Capture Electronic Signature button will be enabled when the Capture Electronic Signature dialog is active. It has a mnemonic of “C”.

11.4.1.6 Save Signature Button

The Save Signature button will be enabled when the Capture Electronic Signature dialog is active. It has a mnemonic of "S".

11.4.1.7 Cancel Button

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

11.4.2 Processes

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

11.4.2.1 Initializing the Interface

Upon initial presentation of the dialog, the title bar text will be set to "Capture Electronic Signature"

The Participants and Checks tree view will be populated with all of the household participants who received checks and the set(s) of checks that were issued to each participant.

The Electronic Signature picture box will be blank.

11.4.2.2 Edits

Upon selection of the Save Signature button, if the Electronic Signature picture box does not contain a signature the system will invoke a standard message with the text "Form must be signed to proceed further."

11.4.2.3 Capture Participant Signature

Upon selection of the Capture Signature button, the system will activate the digital signature pad.

The signature pad will display the participant names listed on the Capture Electronic Signature dialog so the participant can verify which participants require a signature for their checks.

The signature pad will also display a message that explains to the participant that their signature indicates they have received all of the checks with the check numbers listed on the pad.

Once the participant scrolls through all of the information the digital signature pad will prompt them for their signature. This invokes the eSign Signature Capture dialog described in this document.

11.4.2.4 Save Signature and Continue

Upon successful completion of the above-listed edits, the system will save the electronic signature information to the database and will return to the calling window.

11.4.2.5 Cancel

Upon selection of the Cancel button, the system will display a message with the text, "Are you sure you want to cancel this process and void checks printed for this household?"

- Select 'No' – the system will return to the Capture Electronic Signature dialog without canceling.
- Select 'Yes' -
  - The system will void the range of serial numbers for he checks printed for the selected household.
  - The system will dismiss the dialog and return to the calling window.

Note: It will be the responsibility of the Clinic to destroy the hard copy check stock that was printed.

11.5 eSign Signature Capture

The eSign Signature Capture dialog allows the user to view the participant's signature as it is entered on the digital signature pad. It is invoked when the user selects the Capture Electronic Signature button on the Capture Electronic Signature dialog.

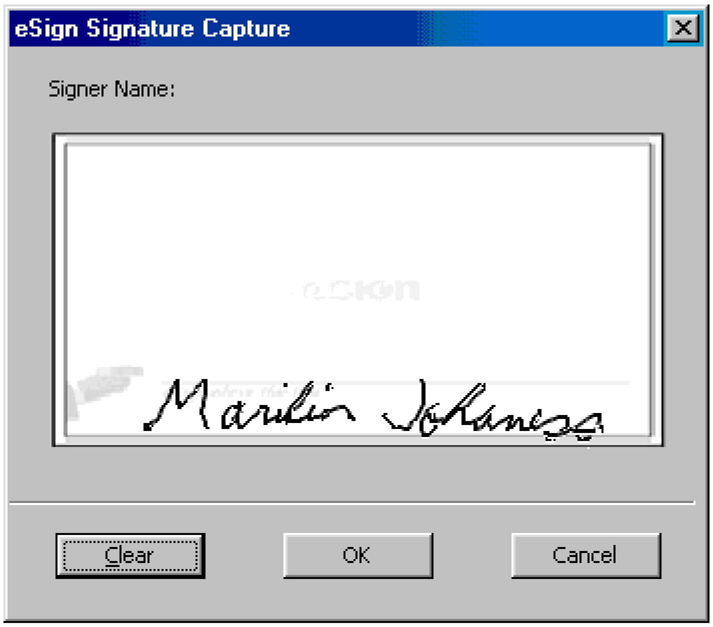

Figure 9 - eSign Signature Capture Dialog

11.5.1 Controls

This section describes the behavior of the controls on the eSign Signature Capture dialog.

11.5.1.1 Participant Signature Display Box

This control allows the user to view the signature that was recorded on the digital signature pad. The value in the box is read only.

11.5.1.2 Clear Button

The Clear button will be enabled when the eSign Signature Capture dialog is active. It has a mnemonic of "C".

11.5.1.3 OK Button

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

11.5.1.4 Cancel Button

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

11.5.2 Processes

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

11.5.2.1 Initializing the Interface

Upon initial presentation of the dialog, the title bar text will be set to “eSign Signature Capture”.

The Participant Signature display box will initially be empty.

11.5.2.2 Edits

Upon selection of the OK button the system will close the eSign Signature Capture dialog and pass the electronic signature information back to the Capture Participant Signature dialog.

11.5.2.3 Clear Signature

Upon selection of the Clear button the system will discard the signature information that was captured on the digital signature pad without closing the dialog. This allows the participant to enter their signature again when mistakes are made.

11.5.2.4 Cancel

Upon selection of Cancel button, the system will dismiss the dialog without saving and return to the Capture Electronic Signature dialog.

11.6 Issue Checks (Food Prescription Tab)

The Food Prescription tab of the Issue Checks dialog allows the user to view the food prescriptions for the participants of the household. It is invoked when the user selects the Food Prescription tab on the Issue Checks dialog.

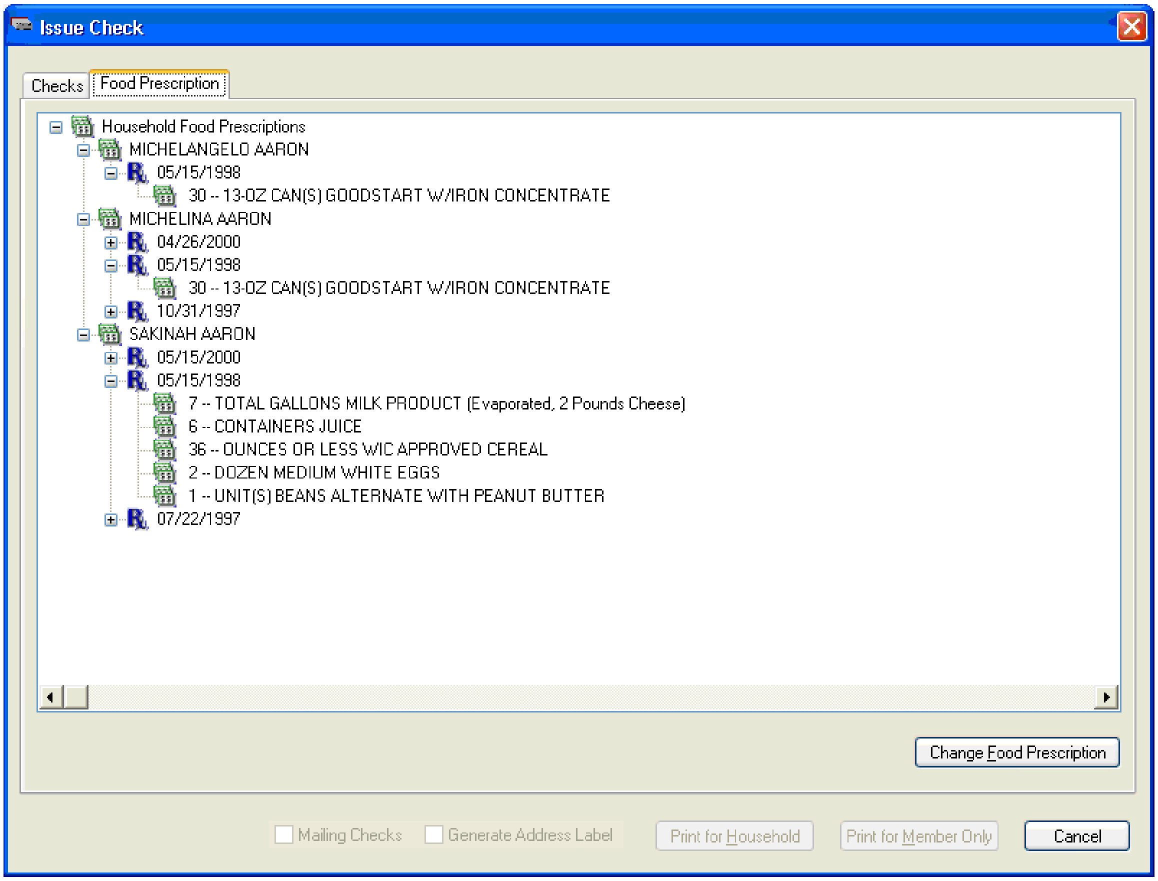

Figure 10 - Issue Checks Dialog (Food Prescription Tab)

11.6.1 Controls

This section describes the behavior of the controls on the Food Prescription tab of the Issue Checks dialog.

11.6.1.1 Food Prescriptions Display Tree View

This control allows the user to view the food prescriptions for the household participants along with the food items that comprise the food prescriptions. The tree view will be enabled when the Food Prescription tab is active. It will consist of the following hierarchical structure:

```
Food Prescriptions Root
|
|_ Household Participant Node
    |
    |__Food Prescription Node
    |    |
    |    |__Food Item Node
    |    |__Food Item Node
    |    |__Food Item Node
    |
    |__Food Prescription Node
```

It will be filled with all existing food prescriptions for the household participants. The food prescriptions will display in chronological order according to the value of the food prescription effective date. The data values on the tree view will be read-only.

11.6.1.2 Household Participant Tree View Node

This node of the Food Prescriptions Display tree view allows the user to view the household participant for whom the food prescription is made. The node will consist of an appropriate icon and text in the format of {first name}, {middle initial} {last name}. The Household Participant tree view node will be sorted in alphabetical order by last name then by first name. All Household Participant tree view nodes will be expanded.

11.6.1.3 Food Prescription Tree View Node

This node of the Food Prescriptions Display tree view allows the user to view the date on which the food prescription is to take effect. The node will consist of an appropriate icon and text in the format of {food prescription effective date (MM/DD/CCYY)}. The Food Prescription tree view nodes will be sorted in chronological order by food prescription effective date. The food prescription closest to the current system date (equal to or greater than the current system date) for each household participant will default to expanded. All other food prescription nodes will be collapsed.

11.6.1.4 Food Item Tree View Node

This node of the Food Prescriptions Display tree view allows the user to view the food items that comprise a food prescription. The node will consist of an appropriate icon and text in the format of {quantity of food item} {description of food item}.

11.6.1.5 Change Food Prescription Button

This control allows the user to adjust the food prescriptions for the selected household participant. The Change Food Prescription button will be enabled when a Household Participant tree view node is highlighted on the Food Prescriptions Display tree view. It has a mnemonic of "F".

Upon selection of the Change Food Prescription button, the system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Food Prescriptions.FullControl) to edit the food prescriptions, the system will invoke a standard error message with the text "You do not have the necessary permissions to update food prescription information. Please see the supervisor."

11.6.1.6 Mailing Checks Check Box

This control allows the user to indicate that the issued checks will be mailed to the household of the participant. The check box will not be enabled when the Food Prescription tab is active.

11.6.1.7 Generate Address Label Check Box

This control allows the user to specify that an address label should be produced for the household of the participant. The check box will not be enabled when the Food Prescription tab is active.

11.6.1.8 Print for Household Button

This control allows the user to instruct the system to print the indicated sets of checks for the household. The Print for Household button will not be enabled when the Food Prescription tab is active.

11.6.1.9 Print for Member Only Button

This control allows the user to instruct the system to print the indicated sets of checks for the selected household participant. The Print for Member Only button will not be enabled when the Food Prescription tab is active.

11.6.1.10 Cancel Button

This control allows the user to exit the Issue Checks dialog without producing any checks. The Cancel button will be enabled when the Issue Checks dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.6.2 Processes

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

11.6.2.1 Initializing the Interface

Upon initial display of the tab, the Household Food Prescriptions tree will display all participants within the household. The food prescription(s) for each household member will display in chronological order according to the value of the food prescription effective date.

11.6.2.2 Edits

There are currently no edits defined for this tab.

11.6.2.3 Change Food Prescription

Upon selection of the Change Food Prescription button, the system will invoke the Food Prescription dialog described in Common Interface Panels - *Chapter L - Food Prescription* for participant selected in the Food Prescriptions Display tree.

11.6.2.4 Cancel

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

11.7 Issue Checks for Participants of On-site Households (Process)

The Issue Checks for Participants of On-site Households process attempts to produce food instruments for those participants of the selected households who are eligible. The households are selected from the Households On-site display grid on the Work with On-site Group dialog described in Clinic - *Chapter 06 - Search-Selection*. The system will invoke the Issue Checks for Participants of On-site Households process if the Issue Checks check box is marked when the Apply or OK button is selected.

11.7.1 Controls

This is a non-interactive process. It does not have a dialog associated with it, although it calls other dialogs.

11.7.2 Processes

This section describes the processes that take place as part of the Issue Checks for Participants of On-site Households process.

11.7.2.1 Display Progress Bar

During the Issue Checks for Participants of On-site Households process, a progress bar will display at the bottom of the Work with On-site Group dialog to show the status of the process.

11.7.2.2 Determine the Order to Issue Checks

Upon starting the Issue Checks process, the system will determine the order in which checks should be issued to households included in the on-site group. The order in which checks are printed for the on-site households is determined by the OnPremisesDTTM attribute of the MEMBER entity. The system checks the members of each household to determine the earliest time at which a member was marked as on-site. The earliest on-site time for each household is used to rank the households chronologically in ascending order.

11.7.2.3 Determine Checks to Issue

Upon starting the Issue Checks process, the system will determine the checks that should be issued for the households included from the on-site group. For each household, the system will determine which household participants are eligible to receive checks and the set(s) of checks to issue to each participant.

The system will take into account the following factors when determining the checks to issue to each household:

- Cycle Adjustment - The system will issue sets of checks such that the participants of the household can pick up checks at the same time.
- Issuance Frequency - The system will issue the number of sets of checks for a household participant according to the issuance frequency specified by the CPA in the CPA-Determined Follow-up dialog described in Chapter O - CPA Determined Follow-up.
- Late Pickup - The system will adjust the package size for the first set of checks for the affected household participants if the checks issued will cause the household participant to be late in picking up checks.
- Certification End Date - The system will not issue checks past the end of the month of the current certification period for the household participant.
- Previous Issuance - The system will not issue sets of checks for a participation month in which the household participant has already received a set of checks.

The global steps necessary to issue the correct sets of checks to print for the household are as follows:

- Identify the base participant (the household participant to whom the system will cycle adjust)
- Determine the sets of checks to issue for base participant
- Cycle adjust other household participants according to the sets of checks to be issued for the base participant
- Prorate package sizes based on cycle adjusted sets

Each step is described in detail below, and is repeated for each household included from the on-site group.

11.7.2.3.1 Identify the Base Participant

The system will determine the participant who has the longest continuous participation on the WIC program by checking the certification records for the participant. There may not be any gaps between the end date of one certification and the beginning date of the next certification period to count as a continuous certification. The participant with the longest continuous certification is considered the base participant, unless that participant will be categorically ineligible at the time of issuance of the first set of checks. In this case, the system will check for the next longest certification. This algorithm is repeated until the base participant is found.

If all household participants have equal lengths of continuous certifications, or the system does not have adequate information due to in-state or out-of-state transfers, the system will determine the base participant according to the following rules:

- The system will start with the oldest infant or child in the household whose certification end date is greater than the current system date.
- If this participant will be categorically ineligible before the end of the current certification, the system will skip to the next oldest household participant.
- If the participant has not yet received checks for the current participation month, the system will determine the first date to use for the first set of checks for the participant. If this date is past the certification end date for the current certification of the participant, the system will skip to the next oldest household participant.
- The resulting participant is the base participant.

11.7.2.3.2 Determine Set of Checks to Issue for Base Participant

The following steps will be performed to determine the sets of checks that should be issued to the base participant:

If the certification period of the base participant ends before any checks would be generated according to following steps, no sets of checks will be issued for any household participant.

If no previous checks are present for the current certification period for the base participant, both the expected and actual first date to use for the first set of checks will be the current system date. The last date to use for the first set of checks will be the number of days in the current month after the first date to use.

If two sets of checks are issued and outstanding for the participant (two sets with a first date to use greater than the current system date), no sets of checks will be issued.

If previous checks are present for the current certification period, the expected first date to use is one day after the last date to use for the last set of checks issued for the current certification period. The actual first date to use is the later of the expected first date to use or the current system date. The last date to use for the first set of checks will be the number of days in the current month after the expected first date to use.

If the last date to use is before the current system date, the expected first date to use becomes one day after the last date to use. The new last date to use will be the number of days in the current month after the expected first date to use. This algorithm will be repeated until the last date to use is greater than the current system date.

Once the first set of checks has been determined, the system will issue up to two additional sets of checks with adjoining first date to use and last date to use until one of the following conditions exist:

- The first date to use is greater than the termination date for the current certification.
- The first date to use is greater than the certification end date for the current certification.
- The last date to use is greater than six (6) weeks past the expected delivery date (if the participant is a pregnant woman)
- The number of sets to be issued is equal to or less than the issuance frequency for the participant (1, 2, or 3 months).

11.7.2.3.3 Cycle Adjustment of Household Participants

Once the first set of checks has been determined for the base participant, the system will determine the sets of checks to be issued for each additional household participant as follows:

The system will determine the first set of checks to be issued for the household participant according to the rules specified above for the base participant.

The system will then search for the most recent historical or suggested issuance for the base participant where the actual first date to use is less than or equal to the actual first date to use for the current participant. The system will set the last date to use for the current participant to the same date as the last date to use for the base participant.

Once the first set of checks has been determined, the system will suggest up to two additional sets of checks with adjoining first date to use and last date to use until one of the following conditions exist:

- The first date to use is greater than the termination date for the current certification.
- The first date to use is greater than the certification end date for the current certification.
- The last date to use is greater than six (6) weeks past the expected delivery date (if the participant is a pregnant woman)
- The number of sets to be issued is equal to or less than the issuance frequency for the participant (1, 2, or 3 months).
- The first date to use for the set is greater than the first date to use for the last set suggested for the base participant.

11.7.2.3.4 Create Partial Month Issuance Based on Cycle-Adjusted Sets

Once sets of checks have been determined for each household participant, the system will determine the prorating of package sizes for the first set of checks for each household participant according to the following:

The system will calculate the number of days between the actual first date to use and the last date to use for the set of checks.

For women and children, the following chart shows the partial month issuance for milk and juice:

Number of Days between Actual First Date to Use and Last Date to Use (inclusive)	**Food Package Size**
1 – 7	¼ package
8 – 15	½ package
16 – 23	¾ package
24 - 31	Full package

The upper limit for each food package size is stored in the following business rules. The upper limit for a Full package is not required as it is always the number of days in the issuance month:

- C_Max_Days_Quarter_Package (value is 7)
- C_Max_Days_Half_Package (value is 15)
- C_Max_Days_Three_Quarter_Package (value is 23)
- B_Max_Days_Quarter_Package (value is 7)
- B_Max_Days_Half_Package (value is 15)
- B_Max_Days_Three_Quarter_Package (value is 23)
- P_Max_Days_Quarter_Package (value is 7)
- P_Max_Days_Half_Package (value is 15)
- P_Max_Days_Three_Quarter_Package (value is 23)
- N_Max_Days_Quarter_Package (value is 7)
- N_Max_Days_Half_Package (value is 15)
- N_Max_Days_Three_Quarter_Package (value is 23)

For infants, the following chart shows the partial month issuance for formula:

Number of Days between Actual First Date to Use and Last Date to Use (inclusive)	**Food Package Size**
1 – 7	½ package
8 – 15	¾ package
16 – 31	Full package

The upper limit for Infants for each food package size is stored in the following business rules. The upper limit for a Full package is not required as it is always the number of days in the issuance month:

- I_Max_Days_Half_Package (value is 7)
- I_Max_Days_Three_Quarter_Package (value is 15)

11.7.2.4 Print Checks

Once the system has determined the checks to issue for the household, it will send print instructions to the Check Printer defined in System Tools for the sets of checks to be issued to the household participants.

11.8 Add/Replace Set of Checks

The Add/Replace Set of Checks dialog allows the user to add a set of checks to compensate the participant for a late scheduled subsequent certification appointment, or replace sets of checks for a food prescription change. It is invoked when the user selects the Add/Replace Set of Checks menu item from the Check Management menu defined in Clinic – *Chapter 09 - Participant Folder*.

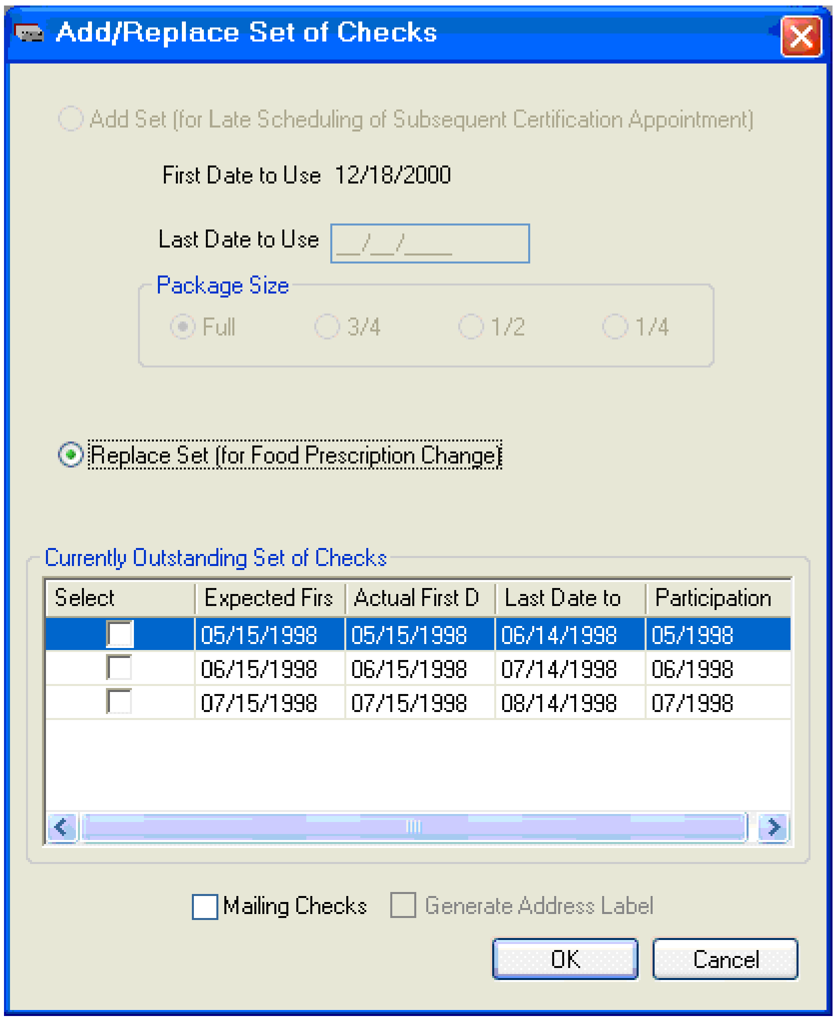

Figure 11 - Add/Replace Set of Checks Dialog

11.8.1 Controls

This section describes the behavior of the controls on the Add/Replace Set of Checks dialog.

11.8.1.1 Dialog Function Radio Button Group

This control group allows the user to indicate the function to be performed by the Add/Replace Set of Checks dialog. The radio button group consists of the following radio buttons:

- Add Set (for Late Scheduling of Subsequent Certification Appointment)
- Replace Sets (for Food Prescription Change)

The Add Set radio button will be enabled when either of the following pairs of conditions is met:

- a set of checks has not been issued with a first date to use that is past the certification end date of the current certification period of the participant
- the current system date is less than or equal to 30 days before the certification end date of the current certification

OR

- the participant is no longer in a valid certification period
- the current system date is less than or equal to the next Expected Last Date to Use which occurs after the certification end date

The Replace Sets radio button will be enabled when there are sets of checks issued to the participant with a last date to use that is greater than the current system date.

If the Replace Sets radio button is enabled, it will default to selected. If the Replace Sets radio button is disabled and the Add Set radio button is enabled, the Add Set radio button will default to selected. If neither radio button is enabled, the system will invoke a standard error message with the text "A set of checks can not be added or replaced for this participant." The system will then exit the Add/Replace Set of Checks dialog.

Upon selection of the Add Set radio button, the system will disable the Currently Outstanding Sets of Checks display grid and will enable the following controls:

- Last Date to Use masked edit box
- Package Size radio button group

Upon selection of the Replace Sets radio button, the system will enable the Currently Outstanding Sets of Checks display grid and will disable the following controls:

- Last Date to Use masked edit box
- Package Size radio button group

11.8.1.2 First Date to Use Text and Value Label

This control allows the user to view the first date to use for the set of checks to be issued. The value label will be filled with the value of the certification end date for the current certification period of the participant. It will display in the inverse color of the dialog.

11.8.1.3 Last Date to Use Masked Edit Box

This control allows the user to enter the last date to use for the set of checks to be issued. The masked edit box will be enabled when the Add Set radio button is selected. 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. It will default to the date that is the number of days in the current month past the value of the First Date to Use value label.

11.8.1.4 Package Size Radio Button Group

This control allows the user to select the package size for the set of checks to be issued. The radio button group will be enabled when the Add Set radio button is selected. It consists of the following radio buttons:

- Full
- ¾
- ½
- ¼

The Full radio button will default to selected.

11.8.1.5 Currently Outstanding Sets of Checks Display Grid

This control allows the user to view the currently outstanding set(s) of checks for the participant and select those to be replaced. The display grid will be enabled when the Replace Sets radio button is selected. It consists of the following columns:

- Select
- Expected First Date to Use
- Actual First Date to Use
- Last Date to Use
- Participation Month/Year

An entry will be added to the grid for each set of checks issued for the participant with a last date to use equal to or greater than the current system date. The grid will be sorted in chronological order by the value of the Expected First Date to Use column. A mark may be placed in the Select column of each outstanding set of checks to be replaced. The values in the remaining columns are read-only.

11.8.1.6 Mailing Checks Check Box

This control allows the user to indicate that the issued checks will be mailed to the household of the participant. The check box will be enabled when the Add/Replace Set of Checks dialog is active. It will initially be unchecked.

11.8.1.7 Generate Address Label Check Box

This control allows the user to specify that an address label should be produced for the household of the participant. The check box will be enabled when the Mailing Checks check box is marked. It will initially be disabled and unchecked.

11.8.1.8 OK Button

This control allows the user to instruct the system to edit the values of the controls, add or replace the indicated checks, and exit the Add/Replace Set of Checks dialog. The OK button will be enabled when the Add/Replace Set of Checks dialog is active. Characteristics for the OK button are defined in *Consistencies*.

11.8.1.9 Cancel Button

This control allows the user to exit the Add/Replace Set of Checks dialog without replacing any checks. The Cancel button will be enabled when the Add/Replace Set of Checks dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.8.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Add/Replace Set of Checks dialog.

11.8.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to "Add/Replace Set of Checks"

The Add Set radio button will be enabled when either of the following pairs of conditions is met:

- a set of checks has not been issued with a first date to use that is past the certification end date of the current certification period of the participant
- the current system date is less than or equal to 30 days before the certification end date of the current certification

  OR

- the participant is no longer in a valid certification period
- the current system date is less than or equal to the next Expected Last Date to Use which occurs after the certification end date

The Replace Sets radio button will be enabled when there are sets of checks issued to the participant with a last date to use that is greater than the current system date.

If the Replace Sets radio button is enabled, it will default to selected.

If the Replace Sets radio button is disabled and the Add Set radio button is enabled, the Add Set radio button will default to selected.

If neither radio button is enabled, the system will invoke a standard error message with the text "A set of checks can not be added or replaced for this participant." Upon confirmation of the message, the system will exit the Add/Replace Set of Checks dialog.

The Mailing Checks check box will initially blank.

The Generate Address Label check box will be initially disabled and blank.

11.8.2.2 Edits

Upon selection of the OK button, the system will check that a selection is made in the Dialog Function radio button group. If a selection is not made in the control, the system will invoke a standard error message with the text "Either the Add Set or Replace Sets radio button must be selected in order to perform a function."

If the Add Set radio button is selected, the value of the Last Date to Use masked edit box must be a date equal to or greater than the current system date. It also must be a date less than or equal to the next expected Last Date to Use which occurs after the certification end date.

If the Add Set radio button is selected, a value must be entered in the Last Date to Use masked edit box. Otherwise, the system will display an error message with the text, "An entry is required for the {control label}."

If the Add Set radio button is selected, the value of the Last Date to Use masked edit box must be greater than or equal to the value of the First Date to Use value label but must not be greater than the date which is the number of days in the current month past the value of the First Date to Use value label. Otherwise the system will display an error message with the text, "Date must be greater than or equal to the First Date to Use and no more than 30 days greater than today's date."

If the Replace Sets radio button is selected, at least one entry in the Currently Outstanding Set of Checks display grid must be marked in the Select column.

11.8.2.3 Add Set of Checks

Upon successful completion of the above-listed edits, if the Add Set radio button is selected, the system will print the set of checks specified by the values in the Last Date to Use masked edit box and Package Size radio button group.

11.8.2.4 Replace Set(s) of Checks

Upon successful completion of the above-listed edits, if the Replace Sets radio button is selected, the system will print the set(s) of checks specified by the selected entries in the Currently Outstanding Set of Checks display grid.

11.8.2.5 Generate Address Label

Upon successful completion of the above-listed edits, if the Generate Address Label check box is checked, the system will invoke the Generate Address Label for Checks dialog described in this document.

11.8.2.6 Capture Electronic Signature

Upon successful completion of the above-listed edits, if an authorized signature is required for the issued checks, the system will invoke the Capture Electronic Signature dialog described in this document.

11.8.2.7 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the calling window.

11.9 Identify Checks to Void

The Identify Checks to Void dialog allows the user to view checks issued at the selected clinic that have been issued to participants of the household and select which must be voided. The dialog is invoked when the user selects the Void Checks Issued at This Clinic menu item from the Check Management menu described in Clinic - *Chapter 09 - Participant Folder*.

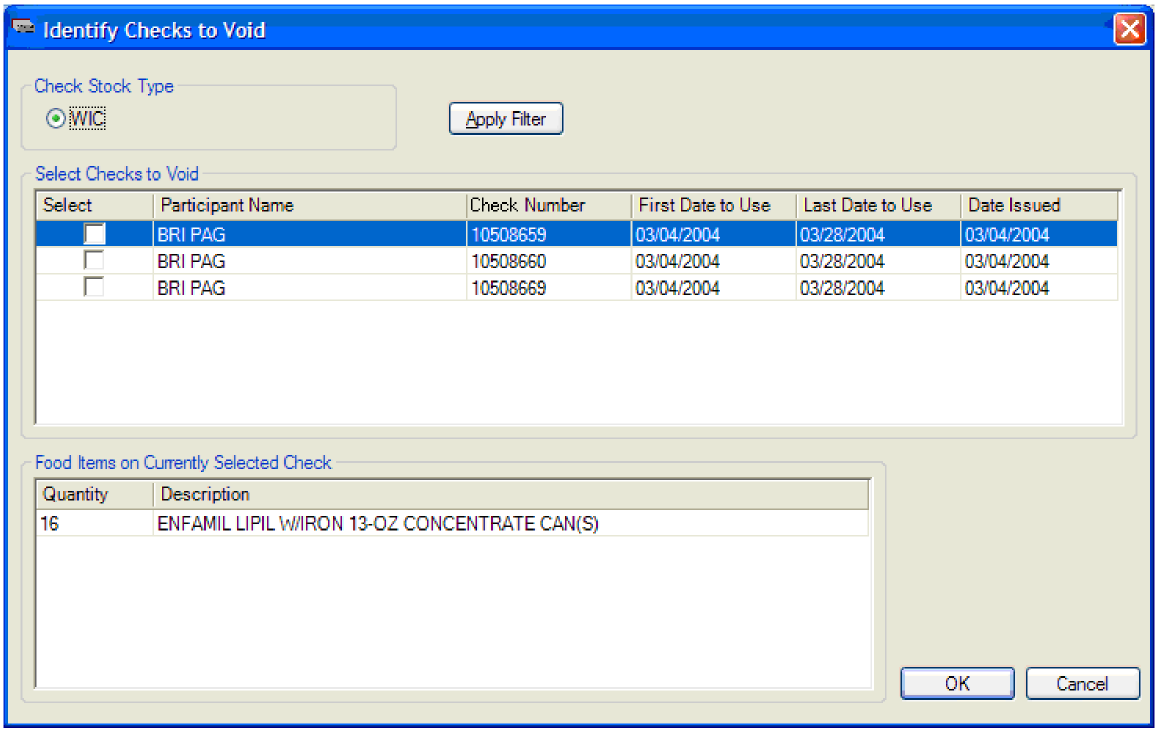

Figure 12 - Identify Checks to Void Dialog

11.9.1 Controls

This section describes the behavior of the controls on the Identify Checks to Void dialog.

11.9.1.1 Check Stock Type Radio Group

This control allows the user to select the check stock type of checks to be voided. It is enabled when the Identify Checks to Void dialog is active. The radio button group consists of the following radio buttons:

- WIC - designates that upon selection of Apply Filter, display WIC checks in the Check Display Grid.

11.9.1.2 Apply Filter Button

This control allows the user to instruct the system to retrieve checks from the database for the check stock specified by the Check Stock radio button and display the list of checks in the Check Display Grid. The Apply Filter button will be enabled when the Void Checks Issued at this Clinic dialog is active. It has a mnemonic of "A".

11.9.1.3 Select Checks Display Grid

This control allows the user to view the checks issued to participants of the household and select one or more of them to be voided. The display grid will be enabled when a check stock type has been selected and the Apply Filter button has been selected. It consists of the following columns:

- Select
- Participant Name
- Check Number
- First Date to Use
- Last Date to Use
- Date Issued

An entry will be added to the grid for the selected check stock type and for each check issued to participants of the household, with a last date to use equal to or greater than the current system date. The grid will be sorted by participant last name and then the value of the First Date to Use column. A mark may be placed in the Select column of each outstanding check to be voided. The values in the remaining columns are read-only.

Upon selection of an entry in the grid, the contents of the Food Items on Currently Selected Check display grid will be refreshed.

11.9.1.4 Food Items on Currently Selected Check Display Grid

This control allows the user to view the food items on the check selected in the Checks display grid. The display grid will be enabled when the Identify Checks to Void dialog is active. It consists of the following columns:

- Quantity
- Description

An entry will be added to the grid for each food item on the check selected on the Checks display grid. The values on the grid are read-only.

11.9.1.5 OK Button

This control allows the user to instruct the system to edit the values of the controls and proceed to the Confirm Checks to Void dialog. The OK button will be enabled when the Identify Checks to Void dialog is active. Characteristics for the OK button are defined in *Consistencies*.

11.9.1.6 Cancel Button

This control allows the user to exit the Identify Checks to Void dialog without voiding any checks. The Cancel button will be enabled when the Identify Checks to Void dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.9.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Identify Checks to Void dialog.

11.9.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to "Identify Checks to Void"

The WIC checks stock type will be selected

The Select Checks to Void grid will display an entry for each check issued to participants of the household, with a last date to use equal to or greater than the current system date. The grid will be sorted by participant last name and then the value of the First Date to Use column. No check boxes will be initially selected in the Select column.

The first record in the grid will be initially highlighted.

The Food Items on Currently Selected Check will display all Food Items for the selected check in the Select Checks to Void grid.

11.9.2.2 Edits

Upon selection of the OK button, the system will verify that at least one entry is marked in the Select column of the Checks display grid. If a selection is not made in the Select column, the system will invoke a standard error message with the text "At least one check must be selected."

If no checks are displayed in the Select Checks to Void grid the system will invoke a standard error message with the text "There are no checks listed to void. Please specify Check Stock Type and press the Apply Filter button to retrieve a list of outstanding checks for this participant."

11.9.2.3 Confirm Checks to Void

Upon successful completion of the above-listed edits, the system will invoke the Confirm Food Instrument Issued at This Clinic to Void dialog described in this document.

11.9.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the calling window.

11.10 Confirm Checks Issued at This Clinic to Void

The Confirm Checks to Void dialog allows the user to confirm that the selected checks are to be voided and optionally reprinted. It is invoked when the user selects the OK button on the Identify Checks to Void dialog when at least one check is selected in the Select Checks grid.

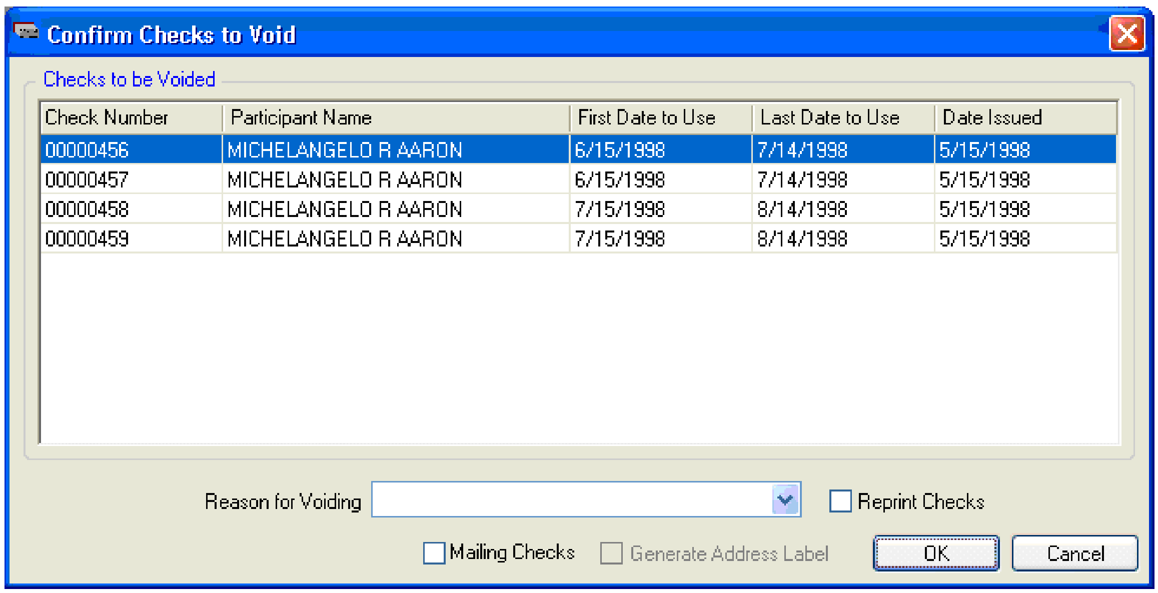

Figure 13 - Confirm Checks to Void Dialog

11.10.1 Controls

This section describes the behavior of the controls on the Confirm Checks to Void dialog.

11.10.1.1 Checks to be Voided Display Grid

This control allows the user to view the check(s) that were selected on the Identify Checks to Void dialog and confirm that the correct checks will be voided. The display grid will be enabled when the Confirm Checks to Void dialog is active. It consists of the following columns:

- Check Number
- Participant Name
- First Date to Use
- Last Date to Use
- Date Issued

An entry will be added to the grid for each check marked as selected in the Checks display grid on the Identify Checks to Void dialog. The grid will be sorted by participant last name and then the value of the First Date to Use column. The values on the grid are read-only.

11.10.1.2 Reason for Voiding Dropdown

This control allows the user to select the reason the checks on the Selected Checks display grid are to be voided. The dropdown will be enabled when the Confirm Checks to Void dialog is active. It will be filled with a list of void reasons from the reference dictionary table of the lookup database. It will initially be blank.

11.10.1.3 Reprint Checks Check Box

This control allows the user to indicate that the system should reprint the checks after they have been voided. The check box will be enabled when the Confirm Checks to Void dialog is active. It will initially be blank.

11.10.1.4 Mailing Checks Check Box

This control allows the user to indicate that the issued checks will be mailed to the household of the participant. The check box will be enabled when the Reprint Checks check box is marked. It will initially be unchecked.

11.10.1.5 Generate Address Label Check Box

This control allows the user to specify that an address label should be produced for the household of the participant. The check box will be enabled when the Mailing Checks check box is marked. It will initially be disabled and unchecked.

11.10.1.6 OK Button

This control allows the user to instruct the system to void the checks in the Selected Checks display grid and to reprint the checks if necessary. The OK button will be enabled when the Confirm Checks to Void dialog is active. Characteristics for the OK button are defined in *Consistencies*.

11.10.1.7 Cancel Button

This control allows the user to exit the Confirm Checks to Void dialog and return to the Identify Checks to Void dialog without voiding any checks. The Cancel button will be enabled when the Confirm Checks to Void dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.10.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Confirm Checks to Void dialog.

11.10.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to "Confirm Checks to Void".

An entry will be added to the grid for each check marked as selected in the Checks display grid on the Identify Checks to Void dialog. The grid will be sorted by participant last name and then the value of the First Date to Use column.

The Reason for Voiding dropdown will be initially blank.

The Reprint Checks check box will be initially blank.

The Mailing Checks check box will be initially blank.

The Generate Address Label check box will be initially disabled and blank.

11.10.2.2 Edits

Upon selection of the OK button, the system will check that a selection is made in the Reason for Voiding dropdown. If a selection is not made in the dropdown, the system will invoke a standard error message with the text "A selection is required in the Reason for Voiding."

11.10.2.3 Void Checks

Upon successful completion of the above-listed edits, the system will void the checks listed in the Selected Checks display grid with the reason specified in the Reason for Voiding dropdown.

11.10.2.4 Reprint Checks

Upon successful completion of the above-listed edits, if the Reprint Checks check box is checked the system will instruct the system to print new checks to the Check Printer defined in System Tools with the identical food items, quantities and dates to use (except for the first date to use, which will be the current system date) as the checks listed in the Selected Checks display grid.

11.10.2.5 Generate Address Label

Upon successful completion of the above-listed edits, if both the Reprint Checks and Generate Address Label check boxes are checked the system will invoke the Generate Address Label for Checks dialog described in this document.

11.10.2.6 Capture Electronic Signature

Upon successful completion of the above-listed edits, if the Reprint Checks check box is checked and an authorized signature is required for the issued checks the system will invoke the Capture Electronic Signature dialog described in this document.

11.10.2.7 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the calling window.

11.11 Void Checks Issued at Another Clinic

The Void Checks Issued at Another Clinic dialog allows the user to void a check issued at a clinic other than the current clinic (or affiliated satellite sites). It is invoked when the user selects the Void Checks Issued at Another Clinic menu item from the Check Management menu described in Section 9.1.1.8.3. This function may not be available in your state.

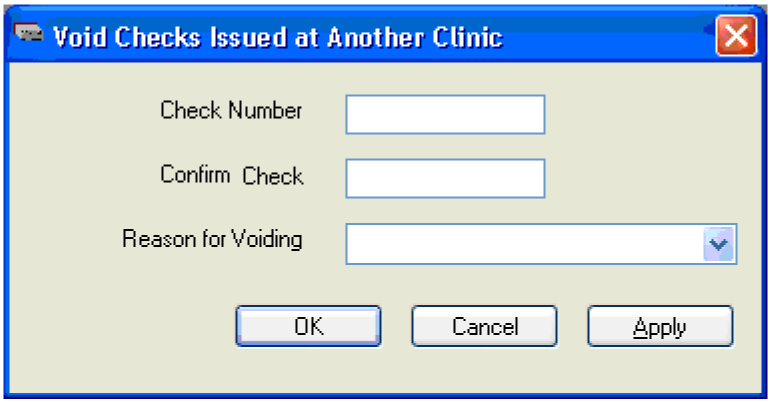

Figure 14 - Void Checks Issued at Another Clinic Dialog

11.11.1 Controls

This section describes the behavior of the controls on the Void Checks Issued at Another Clinic dialog.

11.11.1.1 Check Number Masked Edit Box

This control allows the user to enter the check number of the check to void that was issued at another clinic.

11.11.1.1.1 Characteristics

The masked edit box will be enabled when the Void Checks Issued at Another Clinic dialog is active. It will only allow the entry of numeric characters. It has a mask of "########". It will initially be blank.

11.11.1.2 Confirm Check Number Masked Edit Box

This control allows the user to confirm the check number of the check to void that was issued at another clinic.

11.11.1.2.1 Characteristics

The masked edit box will be enabled when the Void Checks Issued at Another Clinic dialog is active. It will only allow the entry of numeric characters. It has a mask of "########". It will initially be blank.

11.11.1.3 Reason for Voiding Dropdown

This control allows the user to select the reason for which the check is to be voided. The dropdown will be enabled when the Void Checks Issued at Another Clinic dialog is active. It will be filled with a list of void reasons from the reference dictionary table of the lookup database. It will initially be blank.

11.11.1.4 OK Button

This control allows the user to instruct the system to edit the values of the controls, void the specified check, and exit the Void Checks Issued at Another Clinic dialog. Previous checks voided using the Apply button have already been modified in the database. The OK button will be enabled when the Void Checks Issued at Another Clinic dialog is active. Characteristics for the OK button are defined in *Consistencies*.

11.11.1.5 Cancel Button

This control allows the user to exit the Void Checks Issued at Another Clinic dialog without voiding a check. Previous checks voided using the Apply button have already been modified in the database and are not affected. The Cancel button will be enabled when the Void Checks Issued at Another Clinic dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.11.1.6 Apply Button

This control allows the user void the specified check then continue editing the values of the controls and without exiting the Void Checks Issued at Another Clinic dialog. The Apply button will be enabled when the Void Checks Issued at Another Clinic dialog is active. It has a mnemonic of "A".

11.11.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Void Checks Issued at Another Clinic dialog.

11.11.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to "Void Checks Issued at Another Clinic"

All controls will be initially blank.

11.11.2.2 Edits

Upon selection of the OK button or Apply button, the system will check that values have been entered in the following controls. Otherwise, the system will display an error message with the text "An entry is required for the {control label}.":

- Check Number masked edit box
- Confirm Check Number masked edit box

The system will check that a selection has been made in the following controls. Otherwise, the system will display an error message with the text "A selection is required in the {control label}.":

Reason for Voiding dropdown

The value entered in the Check Number masked edit box must be a valid check number. Otherwise, the system will display an error message with the text "Invalid check number."

The value entered in the Check Number masked edit box must not be a check number of a check issued at the current clinic or an affiliated satellite site. Otherwise, the system will display an error message with the text "The check number entered must be issued at a different clinic."

The value entered in the Confirm Check Number masked edit box must match the value entered in the Check Number masked edit box exactly. Otherwise, the system will display an error message with the text "The Confirm Check Number must match the Check Number."

11.11.2.3 Void Check and Continue (Apply)

Upon selection of the Apply button and successful completion of the above-listed edits, the system will void the check specified in the Check Number masked edit box with the reason specified in the Reason for Voiding dropdown. The system will then continue to display the Void Checks Issued at Another Clinic dialog and clear the values from the controls to accept further input.

11.11.2.4 Void Check (OK)

Upon selection of the OK button and successful completion of the above-listed edits, the system will void the check specified in the Check Number masked edit box. The Void Checks Issued at Another Clinic dialog will be dismissed and return the user to the calling window.

11.11.2.5 Cancel

Upon selection of the Cancel button, the system will dismiss the Void Checks Issued at Another Clinic dialog without saving the current information and return the user to the calling window. Previously entered values saved by selecting the Apply button will not be lost.

11.12 Identify Lost/Stolen Checks

The Identify Lost/Stolen Checks dialog allows the user to view checks that have been issued and indicate which have been lost or stolen. The dialog is invoked when the user selects the Mark Checks as Lost/Stolen menu item from the Check Management menu described in *Chapter 9 – Participant Folder*.

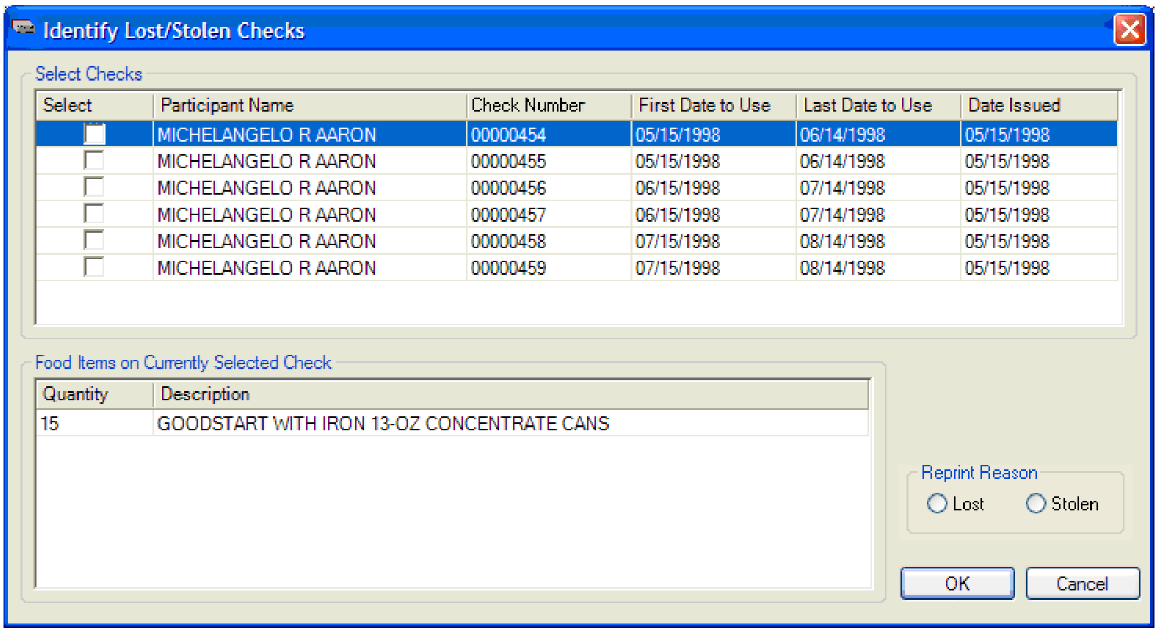

Figure 15 - Identify Lost/Stolen Checks Dialog

11.12.1 Controls

This section describes the behavior of the controls on the Identify Lost/Stolen Checks dialog.

11.12.1.1 Select Checks Display Grid

This control allows the user to view the checks issued to participants of the household and select which ones were lost or reported as stolen. The display grid will be enabled when the Identify Lost/Stolen Checks dialog is active. It consists of the following columns:

- Select
- Participant Name
- Check Number
- First Date to Use
- Last Date to Use
- Date Issued

An entry will be added to the grid for each check issued for participants of the household, with a last date to use equal to or greater than the current system date. The grid will be sorted by the value of the First Date to Use column. A mark may be placed in the Select column of each outstanding check that was lost or reported as stolen. The values in the remaining columns are read-only.

Upon selection of an entry in the grid, the contents of the Food Items on Currently Selected Check display grid will be refreshed.

11.12.1.2 Food Items on Currently Selected Check Display Grid

This control allows the user to view the food items on the check selected in the Checks display grid. The display grid will be enabled when the Identify Lost/Stolen Checks dialog is active. It consists of the following columns:

- Quantity
- Description

An entry will be added to the grid for each food item on the check selected on the Checks display grid. The values on the grid are read-only.

11.12.1.3 Reprint Reason Radio Button Group

This control allows the user to select the reason the checks need to be reprinted. The radio button group will be enabled when the Identify Lost/Stolen Checks dialog is active. It consists of the following radio buttons:

- Lost
- Stolen

No radio button will initially be selected.

11.12.1.4 OK Button

This control allows the user to instruct the system to edit the values of the controls and proceed to the Confirm Checks to Mark as Stolen dialog. The OK button will be enabled when the Identify Lost/Stolen Checks dialog is active. Characteristics for the OK button are defined in *Consistencies*.

11.12.1.5 Cancel Button

This control allows the user to exit the Identify Lost/Stolen Checks dialog without marking any checks as lost or stolen. The Cancel button will be enabled when the Identify Lost/Stolen Checks dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.12.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Identify Lost/Stolen Checks dialog.

11.12.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to "Identify Lost/Stolen Checks"

An entry will be added to the grid for each check issued for participants of the household, with a last date to use equal to or greater than the current system date. The grid will be sorted by the value of the First Date to Use column. No check boxes will be initially selected in the Select column.

The first record in the grid will be initially highlighted.

The Food Items on Currently Selected Check grid will display all food items for the currently highlighted record in the Select Checks grid.

No radio button will be initially selected in the Reprint Reason radio button group.

11.12.2.2 Edits

Upon selection of the OK button, the system will check that at least one entry is marked in the Select column of the Checks display grid. If a selection is not made in the grid, the system will invoke a standard error message with the text "At least one check must be selected."

The system will also check that a selection was made in the Reprint Reason radio button group. If a selection is not made the system will invoke a standard error message with the text "A selection is required in the Reprint Reason".

11.12.2.3 Confirm Lost\Stolen Checks

Upon successful completion of the above-listed edits, the system will invoke the Confirm Checks to Confirm Checks to Mark as Lost/Stolen and Reprint dialog described in this document.

11.12.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the calling window.

11.13 Confirm Checks to Mark as Lost/Stolen and Reprint

The Confirm Checks to Mark as Lost/Stolen and Reprint dialog allows the user to confirm that the selected checks are to be reported as lost or stolen and optionally reprinted. It is invoked when the user selects the OK button on the Identify Lost/Stolen Checks dialog when at least one check is selected in the Select Checks grid.

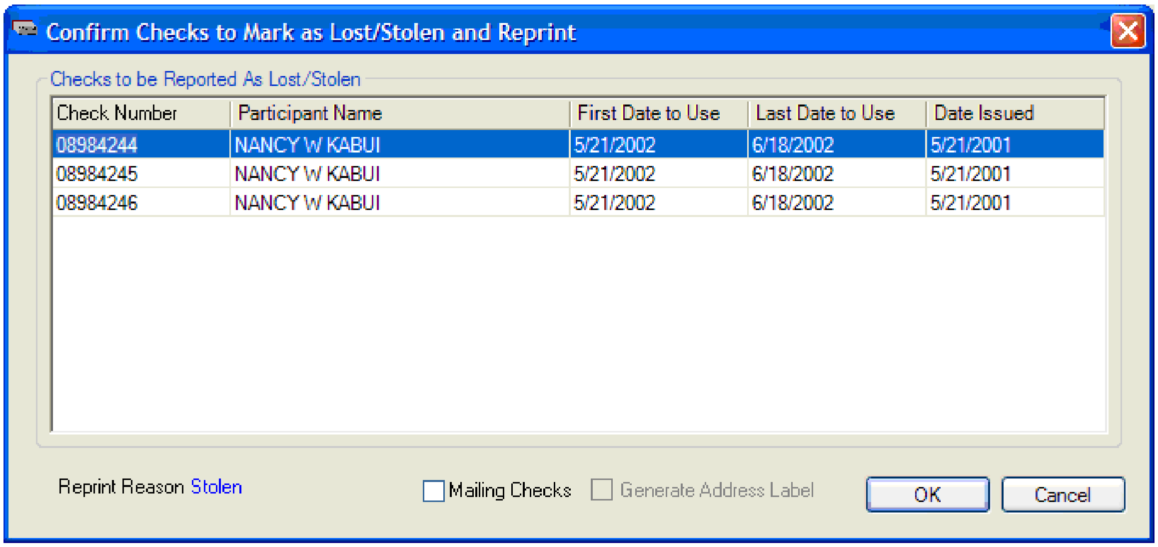

Figure 16 - Confirm Checks to Mark as Lost/Stolen and Reprint Dialog

11.13.1 Controls

This section describes the behavior of the controls on the Confirm Checks to Mark as Lost/Stolen and Reprint dialog.

11.13.1.1 Selected Checks Display Grid

This control allows the user to view the check(s) that were selected on the Identify Lost/Stolen Checks dialog and confirm that the correct checks will be marked as lost or stolen. The display grid will be enabled when the Confirm Checks to Mark as Lost/Stolen and Reprint dialog is active. It consists of the following columns:

- Check Number
- Participant Name
- First Date to Use
- Last Date to Use
- Date Issued

An entry will be added to the grid for each check marked as selected in the Checks display grid on the Identify Lost/Stolen Checks dialog. The grid will be sorted by the participant name and then value of the First Date to Use column. The values on the grid are read-only.

11.13.1.2 Reprint Reason Text and Value Label

This control allows the user to view the reason that the checks are being reprinted. The value label will be filled with the selection that was made in the Reprint Reason Radio Button Group on the Identify Lost/Stolen Checks dialog. It will display in the inverse color of the form.

11.13.1.3 Mailing Checks Check Box

This control allows the user to indicate that the issued checks will be mailed to the household of the participant. The check box will be enabled when the Confirm Checks to Mark as Lost/Stolen and Reprint dialog is active. It will initially be unchecked.

11.13.1.4 Generate Address Label Check Box

This control allows the user to specify that an address label should be produced for the household of the participant. The check box will be enabled when the Mailing Checks check box is marked. It will initially be disabled and unchecked.

11.13.1.5 OK Button

This control allows the user to instruct the system to report the checks in the Selected Checks display grid as lost or stolen and reprint them. The OK button will be enabled when the Confirm Checks to Mark as Lost/Stolen and Reprint dialog is active. Characteristics for the OK button are defined in *Consistencies*.

11.13.1.6 Cancel Button

This control allows the user to exit the Confirm Checks to Mark as Lost/Stolen and Reprint dialog and return to the Identify Lost/Stolen Checks dialog without marking any checks as lost or stolen. The Cancel button will be enabled when the Confirm Checks to Mark as Lost/Stolen and Reprint dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.13.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Confirm Checks to Mark as Lost/Stolen and Reprint dialog.

11.13.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to "Confirm Checks to Mark as Lost/Stolen and Reprint."

The grid will display all selected checks to be marked as lost or stolen.

The Reprint Reason will display the selection of 'Lost' or 'Stolen'.

The Mailing Checks check box will be initially blank

The Generate Address Label check box will be initially disabled and blank.

11.13.2.2 Edits

There are currently no edits defined for this dialog.

11.13.2.3 Mark Checks as Lost and Reprint (Lost)

Upon selection of the OK button, if the Lost radio button was selected on the Identify Lost/Stolen Checks dialog the system will mark the checks on the Selected Checks display grid as lost and the FoodInstrument.LostDate will be set to the current system date. If the state business rule 'REPRINTSTOLEN' = 'Y', the checks will be reprinted.

11.13.2.4 Mark Checks as Stolen and Reprint (Stolen)

Upon selection of the OK button, if the Stolen radio button was selected on the Identify Lost/Stolen Checks dialog the system will mark the checks on the Selected Checks display grid as stolen and the FoodInstrument.StolenDate will be set to the current system date. If the state business rule 'REPRINTSTOLEN' = 'Y', the checks will be reprinted.

11.13.2.5 Generate Address Label

Upon selection of the OK button, if the Generate Address Label check box is checked the system will invoke the Generate Address Label for Checks dialog described in this document.

11.13.2.6 Capture Electronic Signature

Upon successful completion of the above-listed edits, if an authorized signature is required for the issued checks the system will invoke the Capture Electronic Signature dialog described in this document.

11.13.2.7 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the calling window.

11.14 Identify Checks to Reprint for Custody Change

The Identify Checks to Reprint for Custody Change dialog allows the user to view checks that have been issued. The dialog is invoked when the user selects the Reprint Checks for Custody Change menu item from the Check Management menu described in Clinic – *Chapter 09 - Participant Folder*.

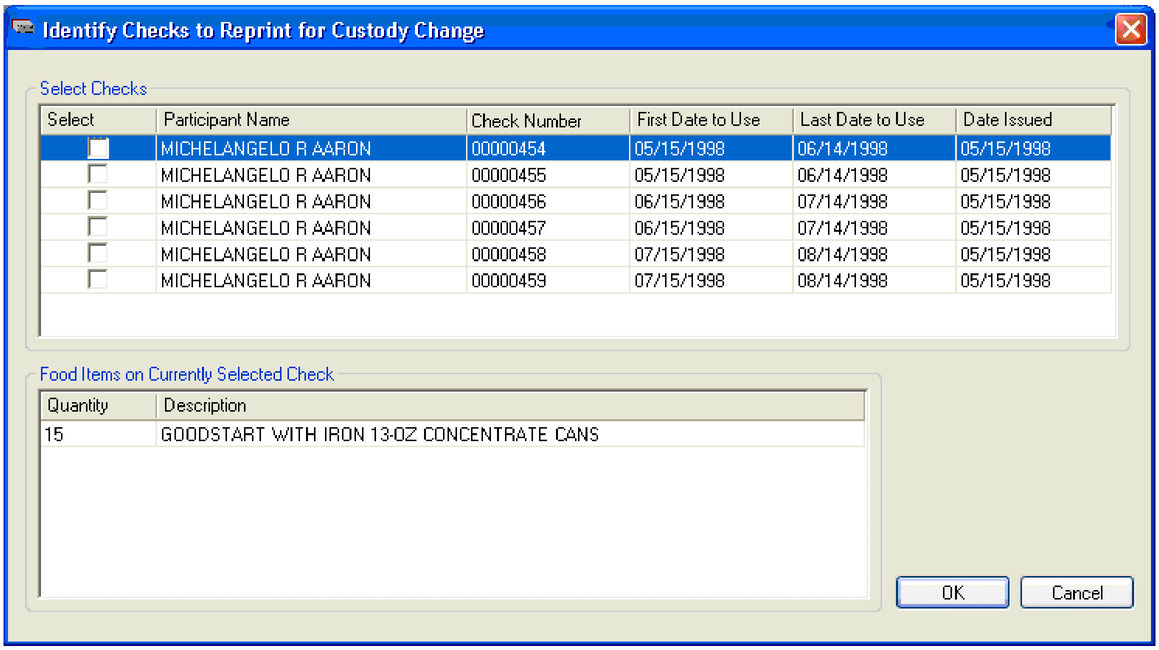

Figure 17 - Identify Checks to Reprint for Custody Change Dialog

11.14.1 Controls

This section describes the behavior of the controls on the Identify Checks to Reprint for Custody Change dialog.

11.14.1.1 Checks Display Grid

This control allows the user to view the checks issued to participants of the household and select which to reprint for a custody change. The display grid will be enabled when the Identify Checks to Reprint for Custody Change dialog is active. It consists of the following columns:

- Select
- Participant Name
- Check Number
- First Date to Use
- Last Date to Use
- Date Issued

An entry will be added to the grid for each check for participants of the household, with a last date to use equal to or greater than the current system date. The grid will be sorted by the value of the participants name and then the value of the First Date to Use column. A mark may be placed in the Select column of each outstanding check to reprint for a custody change. The values in the remaining columns are read-only.

Upon selection of an entry in the grid, the contents of the Food Items on Currently Selected Check display grid will be refreshed.

11.14.1.2 Food Items on Currently Selected Check Display Grid

This control allows the user to view the food items on the check selected in the Checks display grid. The display grid will be enabled when the Identify Checks to Reprint for Custody Change dialog is active. It consists of the following columns:

- Quantity
- Description

An entry will be added to the grid for each food item on the check selected on the Checks display grid. The values on the grid are read-only.

11.14.1.3 OK Button

This control allows the user to instruct the system to edit the values of the controls and proceed to the Confirm Checks to Reprint for Custody Change dialog. The OK button will be enabled when the Identify Checks to Reprint for Custody Change dialog is active. Characteristics for the OK button are defined in *Consistencies*.

11.14.1.4 Cancel Button

This control allows the user to exit the Identify Checks to Reprint for Custody Change dialog without reprinting any checks. The Cancel button will be enabled when the Identify Checks to Reprint for Custody Change dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.14.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Identify Checks to Reprint for Custody Change dialog.

11.14.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to “Identify Checks to Reprint for Custody Change”.

An entry will be added to the grid for each check for participants of the household, with a last date to use equal to or greater than the current system date. The grid will be sorted by the value of the participants name and then the value of the First Date to Use column. No check boxes will be initially selected in the Select column.

The first row in the Select Checks grid will be highlighted.

The Food Items on Currently Selected Check grid will display all food items for the highlighted record in the Select Checks grid.

11.14.2.2 Edit for Required Entry in Controls

Upon selection of the OK button, the system will check that at least one entry is marked in the Select column of the Checks display grid. If a selection is not made in the grid, the system will invoke a standard error message with the text “At least one check must be selected.”

11.14.2.3 Confirm Checks to Reprint

Upon successful completion of the above-listed edits, the system will invoke the Confirm Checks to Reprint for Custody Change dialog described in this document.

11.14.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the calling window.

11.15 Confirm Checks to Reprint for Custody Change

The Confirm Checks to Reprint for Custody Change dialog allows the user to confirm that the selected checks are to be reprinted. It is invoked when the user selects the OK button on the Identify Checks to Reprint for Custody Change dialog when at least one check is selected in the Select Checks grid.

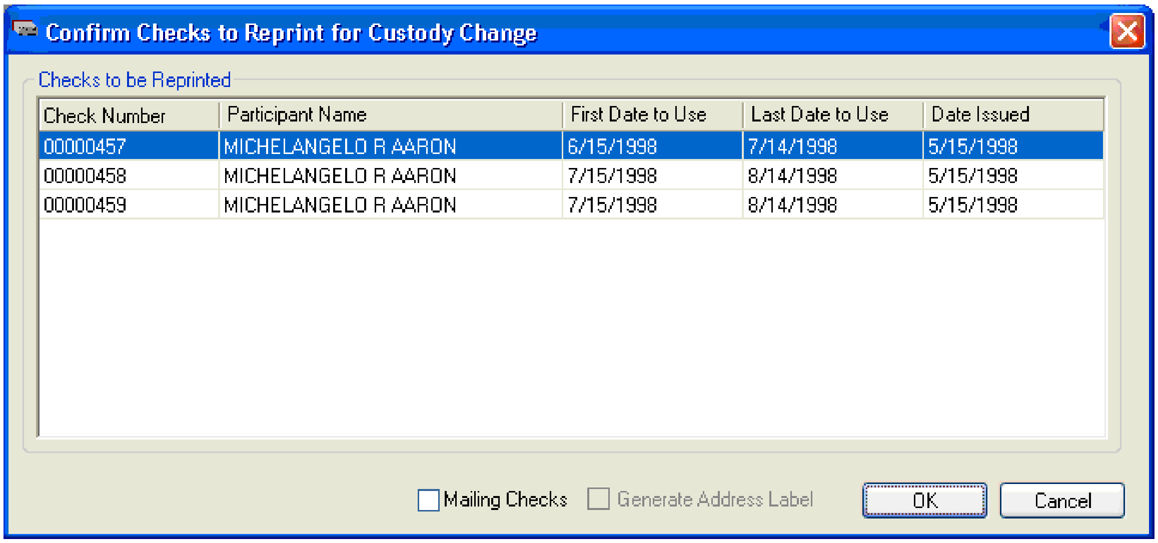

Figure 18 - Confirm Checks to Reprint for Custody Change Dialog

11.15.1 Controls

This section describes the behavior of the controls on the Confirm Checks to Reprint for Custody Change dialog.

11.15.1.1 Checks to be Reprinted Display Grid

This control allows the user to view the check(s) selected on the Identify Checks to Reprint for Custody Change dialog and confirm that the correct checks will be reprinted. The display grid will be enabled when the Confirm Checks to Reprint for Custody Change dialog is active. It consists of the following columns:

- Check Number
- Participant Name
- First Date to Use
- Last Date to Use
- Date Issued

An entry will be added to the grid for each check marked as selected in the Checks display grid of the Identify Checks to Reprint for Custody Change dialog. The grid will be sorted by the participants name and then the value of the First Date to Use column. The values on the grid are read-only.

11.15.1.2 Mailing Checks Check Box

This control allows the user to indicate that the issued checks will be mailed to the household of the participant. The check box will be enabled when the Confirm Checks to Reprint for Custody Change dialog is active. It will initially be unchecked.

11.15.1.3 Generate Address Label Check Box

This control allows the user to specify that an address label should be produced for the household of the participant. The check box will be enabled when the Mailing Checks check box is marked. It will initially be disabled and unchecked.

11.15.1.4 OK Button

This control allows the user to instruct the system to reprint the checks in the Selected Checks display grid. The OK button will be enabled when the Confirm Checks to Reprint for Custody Change dialog is active. Characteristics for the OK button are defined in *Consistencies*.

11.15.1.5 Cancel Button

This control allows the user to exit the Confirm Checks to Reprint for Custody Change dialog and return to the Identify Checks to Reprint for Custody Change dialog without reprinting any checks. The Cancel button will be enabled when the Confirm Checks to Reprint for Custody Change dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.15.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Confirm Checks to Reprint for Custody Change dialog.

11.15.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to “Confirm Checks to Reprint for Custody Change”

An entry will be added to the grid for each check marked as selected in the Checks display grid of the Identify Checks to Reprint for Custody Change dialog. The grid will be sorted by the participant's name and then the value of the First Date to Use column.

The Mailing Checks check box will be initially blank.

The Generate Address Label check box will be initially disabled and blank.

11.15.2.2 Edits

There are currently no edits defined for this dialog.

11.15.2.3 Reprint Checks

Upon selection of the OK button, the system will print the new checks to the Check Printer selected in System Tools with the identical food items, quantities and dates to use (except for the first date to use, which will be the current system date) for all checks selected in the Selected Checks display grid.

11.15.2.4 Generate Address Label

Upon successful completion of the above-listed edits, if the Generate Address Label check box is checked the system will invoke the Generate Address Label for Checks dialog described in this document.

11.15.2.5 Capture Electronic Signature

Upon successful completion of the above-listed edits, if an authorized signature is required for the issued checks the system will invoke the Capture Electronic Signature dialog described in this document.

11.15.2.6 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the calling window.

11.16 Printing Checks

Checks are printed on 3-up check stock, meaning that 3 blank checks are on each page. The system prints the logo (if provided), state WIC ID, participant name, ITO Agency number, Clinic number, first date to use, last date to use, issued date, quantity, redeemable food item description, system generated check number, and MICR line on each check.

Once a request has been made to print checks the application will attempt to locate the default check printer. (Refer to Common Interface Panels - *Chapter S - System Tools*). If the default printer cannot be located (or the default has not been set) the application will prompt the user to select the printer (and paper source) using the Windows Print Dialog. (Note that the application will not be capable of determining if the selected printer is MICR compatible, it is the responsibility of the user to select a printer that is supports MICR printing as well as the appropriate paper source for the printer.) Once a printer is selected and the print dialog is successfully dismissed the print job will be submitted to the printer and the application will ask the user if the selected printer should be set as the default check printer.

Checks are printed in sets, meaning that if checks are being printed for more than one household (as is the case when printing checks for the Work with On-site Group) the print job will be separated into sets.

If during the printing process one or more checks are damaged, the user will be able to specify the checks to be reprinted using the add/replace functionality from the Participant Folder application.

11.16.1 Selecting a Default Printer

The system recognizes 3 types of documents; checks, reports, and [all other] documents. The system is capable of storing a default printer for each of the document types as part of the user's profile. If the user's default printer for the document type is not defined, not found, or is invalid, the application will prompt the user to select a printer via the Windows Print dialog. If the user is prompted to select a printer the application will ask the user if the selected printer (and paper source) should be retained as the default printer for the selected document type.

11.17 Generate Address Label for Checks

The Generate Client Address Label for Checks dialog allows the user to generate an address label for the household of the participant(s) who will receive their checks by mail. It is invoked in response to the following user actions:

- Selection of the Print for Household button on the Issue Checks (Checks Tab) dialog when the Generate Address Label check box is checked.
- Selection of the Print for Member Only button on the Issue Checks (Checks Tab) dialog when the Generate Address Label check box is checked.

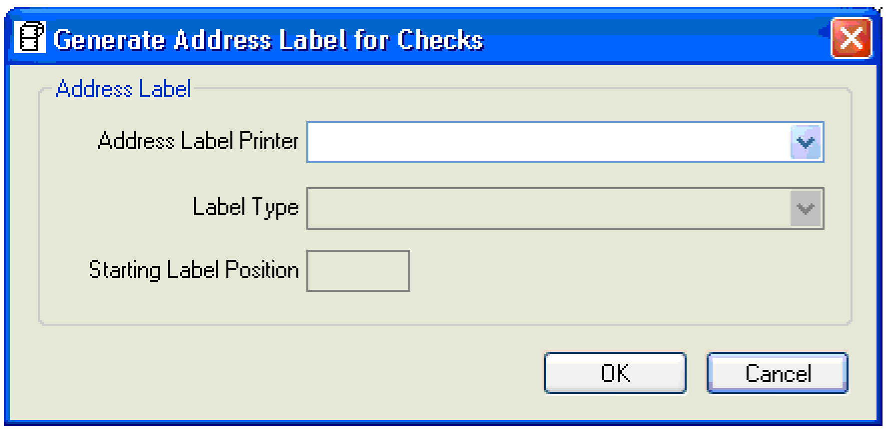

Figure 19 - Generate Client Address Label for Checks Dialog

11.17.1 Controls

This section describes the behavior of the controls on the Generate Client Address Label for Checks dialog.

11.17.1.1 Address Label Printer Dropdown

This control allows the user to select the printer on which the address label should be printed. Printers defined as label printers or other output printers for the workstation can be used to print labels. The dropdown will be enabled when the Generate Address Label for Checks dialog is active. The dropdown will be filled with an entry for each defined label printer and other output printer that is currently active on the system.

11.17.1.2 Label Type Dropdown

This control allows the user to select the type of label stock that is loaded in the printer. The dropdown will be enabled when a laser printer is selected in the Address Label Printer dropdown. It will contain a list of label types from the reference dictionary table of the lookup database that are appropriate for the label printer selected in the Address Label Printer dropdown.

11.17.1.3 Starting Label Position Text Box

This control allows the user to select which mailing label to start with on the label sheet. The text box 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 that are available on the selected label type.

When a laser printer is selected from the Address Label Printer dropdown, a numeric value is required for the Starting Label Position text box.

11.17.1.4 OK Button

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

11.17.1.5 Cancel Button

This control allows the user to exit the Generate Address Label for Checks dialog without printing an address label. The Cancel button will be enabled when the Generate Address Label for Checks dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.17.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Address Label for Checks dialog.

11.17.2.1 Initializing the Interface

Upon initial presentation of the dialog, the title bar text will be set to “Generate Client Address Label for Checks”.

The Address Label Printer dropdown will be initially blank.

The Label Type dropdown will be disabled and blank.

The Starting Label Position text box will be disabled and blank.

11.17.2.2 Edits

Upon selection of the OK button, the system will check for required information.

The system will invoke a standard error message with the text, “A selection is required in the {control label}.” if a selection is not made in the following:

- Address Label Printer dropdown
- Label Type dropdown

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.”

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.

11.17.2.3 Generate Address Label for Checks

Upon successful completion of the edits listed above, the system will generate the Address Label for Checks described in this document.

11.17.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the calling window.

11.18 Address Label for Checks (Output)

An address label may be generated for the household of the participant(s) who will receive their checks by mail.

Address Label for Checks

98865754

Mary S. Participant
6759 Pine Street
Anytown, KS 66210-8373

11.18.1 Data Elements

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

11.18.1.1 Client State WIC ID

This value will be the State WIC ID of the base participant for the household.

11.18.1.1.1 Origin of Data Element

The value will be taken from the Household-Member-State-WIC-Identifier attribute of the HOUSEHOLD-MEMBER entity of the base participant.

11.18.1.1.2 Format

The value will print as its literal value.

11.18.1.2 Client Name

This value will be the full name of the base participant for the household.

11.18.1.2.1 Origin of Data Element

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

11.18.1.2.2 Format

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

11.18.1.3 Client Mailing Address

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

11.18.1.3.1 Origin of Data Element

The value will be taken from the Household-Mailing-Address of the HOUSEHOLD entity of the base participant.

11.18.1.3.2 Format

The value will print as its literal value.

11.18.1.4 Client Mailing City

This value will be the mailing city of the household of the base participant.

11.18.1.4.1 Origin of Data Element

The value will be taken from the Household-Mailing-City of the HOUSEHOLD entity of the base participant.

11.18.1.4.2 Format

The value will print as its literal value.

11.18.1.5 Client Mailing State

This value will be the mailing state of the household of the base participant.

11.18.1.5.1 Origin of Data Element

The value will be taken from the Household-Mailing-State of the HOUSEHOLD entity of the base participant.

11.18.1.5.2 Format

The value will print as its literal value.

11.18.1.6 Client Mailing ZIP Code

This value will be the mailing ZIP code of the household of the base participant.

11.18.1.6.1 Origin of Data Element

The value will be taken from the Household-Mailing-ZIP-Code of the HOUSEHOLD entity of the base participant.

11.18.1.6.2 Format

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

11.18.2 Filter Criteria

11.18.2.1 Base Participant

The system will generate an address label for the base participant for the household.

11.18.3 Sort Order

No sort order is required for a single address label.

11.18.4 Control Breaks

No control breaks are defined for the address label.

11.19 EBT Issuance to Void

The EBT Issuance to Void dialog allows the user to view EBT food instruments issued at the selected clinic that have been issued to participants of the household and select which must be voided. The dialog is invoked when the user selects the Void EBT Food Instruments Issued at This Clinic menu item from the EBT Food Instrument Management menu described in Clinic - *Chapter 09 - Participant Folder*. This option will only be available if EBT is enabled for your implementation.

This option will be **disabled** if the FI_ENABLE_DELIVERYSYSTEMTYPE_EBT business rule is set to “N” (No) or if the clinic logged into is not EBT certification status is set to “Not Ready”.

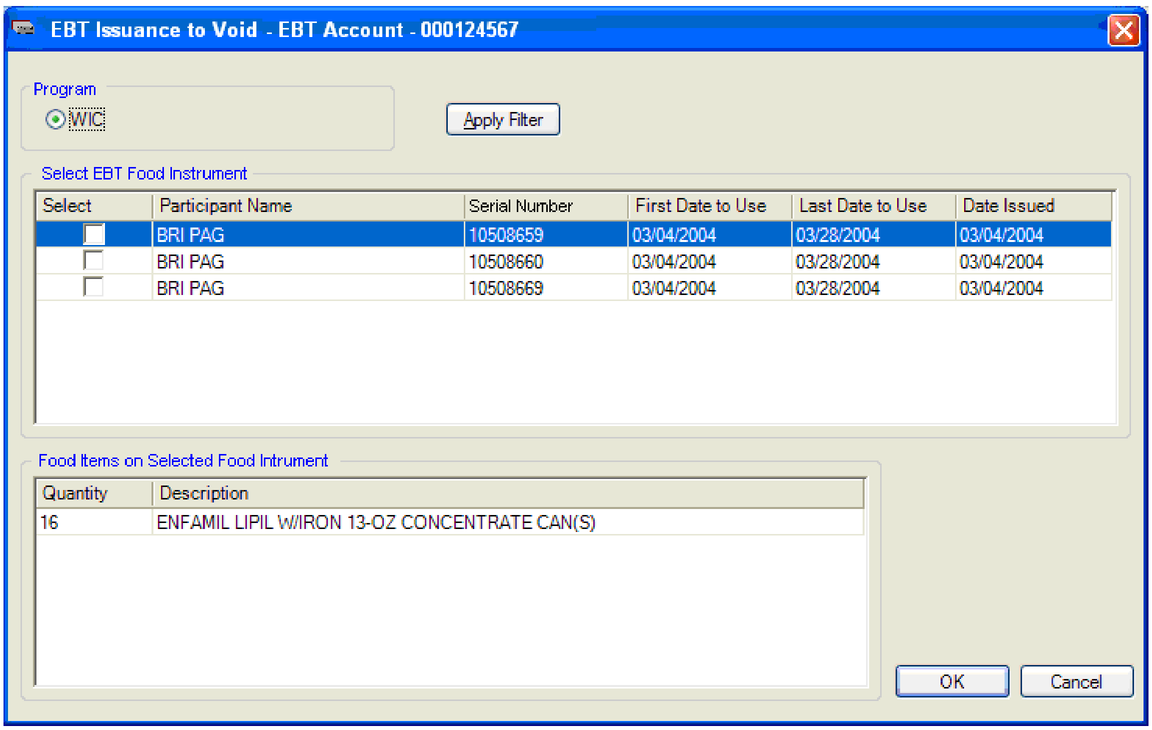

Figure 20 - EBT Issuance to Void Dialog

11.19.1 Controls

This section describes the behavior of the controls on the EBT Issuance to Void dialog.

11.19.1.1 Program Radio Group

This control allows the user to select the program of WIC or FM. It is enabled when the EBT Issuance to Void dialog is active. The radio button group consists of the following radio buttons:

- WIC - designates that upon selection of Apply Filter, display WIC EBT food instruments in the Display Grid.

11.19.1.2 Apply Filter Button

This control allows the user to instruct the system to retrieve EBT Food instruments from the database for the issuance specified by the program radio button and display the list of EBT food instruments in the food instrument Display Grid. The Apply Filter button will be enabled when the EBT Issuance to Void dialog is active. It has a mnemonic of "A".

11.19.1.3 Select EBT Food Instrument Display Grid

This control allows the user to view the EBT food instruments issued to participants of the EBT household and select one or more of them to be voided. The display grid will be enabled when a program type has been selected and the Apply Filter button has been selected. It consists of the following columns:

- Select
- Participant Name
- Serial Number
- First Date to Use
- Last Date to Use
- Date Issued

An entry will be added to the grid for the selected program and for each EBT food instrument issued to participants of the household, with a last date to use equal to or greater than the current system date. The grid will be sorted by participant last name and then the value of the First Date to Use column. A mark may be placed in the Select column of each outstanding food instrument to be voided. The values in the remaining columns are read-only.

Upon selection of an entry in the grid, the contents of the Food Items on Selected EBT food instrument display grid will be refreshed.

11.19.1.4 Food Items on Selected Food Instrument Display Grid

This control allows the user to view the food items on the food instrument selected in the food instrument display grid. The display grid will be enabled when the EBT Issuance to Void dialog is active. It consists of the following columns:

- Quantity

- Description

An entry will be added to the grid for each food item on the EBT food instrument selected on the EBT food instruments display grid. The values on the grid are read-only.

11.19.1.5 OK Button

This control allows the user to instruct the system to edit the values of the controls and proceed to the Confirm EBT Issuance to Void dialog. The OK button will be enabled when the EBT Issuance to Void dialog is active. Characteristics for the OK button are defined in *Consistencies*.

11.19.1.6 Cancel Button

This control allows the user to exit the EBT Issuance to Void dialog without voiding any EBT food instruments. The Cancel button will be enabled when the EBT Issuance to Void dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.19.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the EBT Issuance to Void dialog.

11.19.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to "EBT Issuance to Void for EBT Account " plus the EBTAccountID

The Program Code WIC will be selected

The Select EBT food instruments to Void grid will display an entry for each EBT food instrument issued to participants of the household, with a last date to use equal to or greater than the current system date. The grid will be sorted by participant last name and then the value of the First Date to Use column. No check boxes will be initially selected in the Select column.

The first record in the grid will be initially highlighted.

The Food Items on Selected EBT food instrument will display all Food Items for the selected EBT food instrument in the Select EBT food instruments to Void grid.

11.19.2.2 Edits

Upon selection of the OK button, the system will verify that at least one entry is marked in the Select column of the EBT food instruments display grid. If a selection is not made in the Select column, the system will invoke a standard error message with the text “At least one EBT food instrument must be selected.”

If no EBT food instruments are displayed in the Select EBT food instruments to Void grid the system will invoke a standard error message with the text “There are no EBT food instruments listed to void. Please specify Program and press the Apply Filter button to retrieve a list of outstanding EBT food instruments for this participant."

11.19.2.3 Confirm EBT food instruments to Void

Upon successful completion of the above-listed edits, the system will invoke the Confirm EBT food instrument Issued to Void dialog described in this document.

11.19.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the calling window.

11.20 Confirm EBT Food Instrument Issued to Void

The Confirm EBT Food Instrument to Void dialog allows the user to confirm that the selected Confirm Food Instruments to Void are to be voided. It is invoked when the user selects the OK button on the Confirm EBT Food Instruments to Void dialog when at least one food instrument is selected in the Select EBT Food Instruments grid.

All unredeemed benefits on the food instrument will be voided.

This option will be **disabled** if the FI_ENABLE_DELIVERYSYSTEMTYPE_EBT business rule is set to "N" (No) or if the clinic logged into is not EBT certification status is set to "Not Ready".

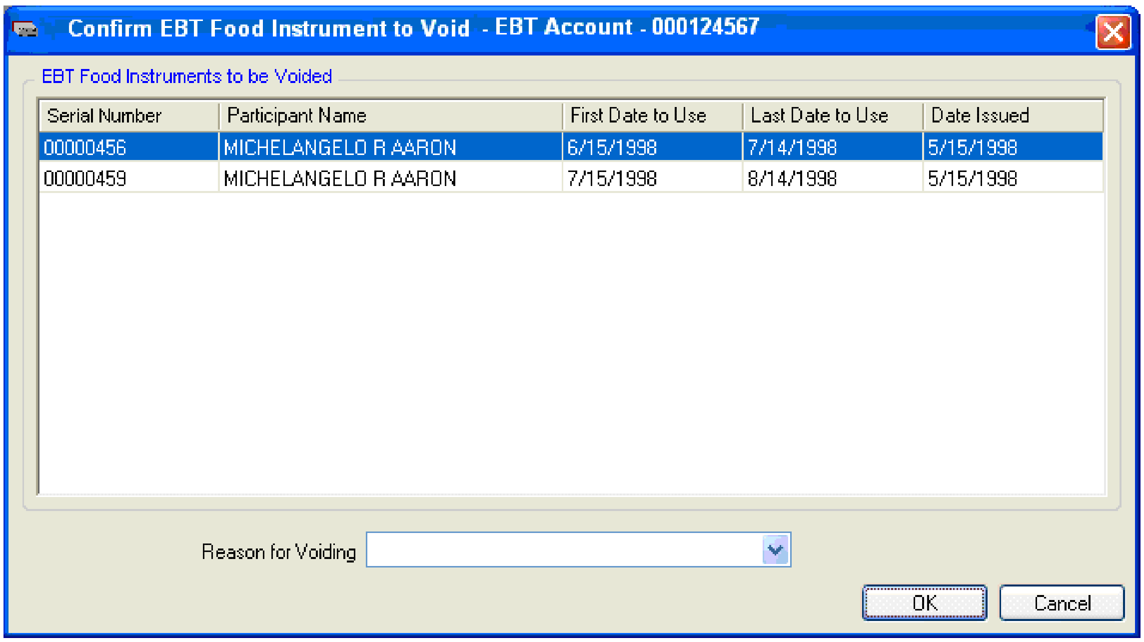

Figure 21 - EBT Food Instrument to Void Dialog

11.20.1 Controls

This section describes the behavior of the controls on the Confirm EBT Food Instrument to Void dialog.

11.20.1.1 EBT Food Instrument to be Voided Display Grid

This control allows the user to view the EBT Food Instrument(s) that were selected on the Identify EBT Food Instruments to Void dialog and confirm that the correct EBT Food Instruments will be voided. The display grid will be enabled when the Confirm EBT Food Instruments to Void dialog is active. It consists of the following columns:

- Serial Number
- Participant Name
- First Date to Use
- Last Date to Use
- Date Issued

An entry will be added to the grid for each EBT Food Instrument marked as selected in the EBT Food Instruments display grid on the Identify EBT Food Instruments to Void dialog. The grid will be sorted by participant last name and then the value of the First Date to Use column. The values on the grid are read-only.

11.20.1.2 Reason for Voiding Dropdown

This control allows the user to select the reason the checks on the Selected Checks display grid are to be voided. The dropdown will be enabled when the Confirm Checks to Void dialog is active. It will be filled with a list of void reasons from the reference dictionary table of the lookup database. It will initially be blank.

11.20.1.3 OK Button

This control allows the user to instruct the system to void the checks in the Selected EBT Food Instruments display grid. The OK button will be enabled when the Confirm EBT Food Instruments to Void dialog is active. Characteristics for the OK button are defined in *Consistencies*.

11.20.1.4 Cancel Button

This control allows the user to exit the Confirm Checks to Void dialog and return to the Identify EBT Food Instruments to Void dialog without voiding any EBT Food Instruments. The Cancel button will be enabled when the Confirm EBT Food Instruments to Void dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.20.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Confirm EBT Food Instruments to Void dialog.

11.20.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to “Confirm EBT Food Instruments to Void”.

An entry will be added to the grid for each EBT Food Instrument marked as selected in the EBT Food Instruments display grid on the Identify EBT Food Instruments to Void dialog. The grid will be sorted by participant last name and then the value of the First Date to Use column.

The Reason for Voiding dropdown will be initially blank.

11.20.2.2 Edits

Upon selection of the OK button, the system will check that a selection is made in the Reason for Voiding dropdown. If a selection is not made in the dropdown, the system will invoke a standard error message with the text "A selection is required in the Reason for Voiding."

11.20.2.3 Void EBT Food Instruments

Upon successful completion of the above-listed edits, the system will void the EBT Food Instruments listed in the Selected EBT Food Instruments display grid with the reason specified in the Reason for Voiding dropdown.

All unredeemed benefits on the food instrument will be voided.

11.20.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the calling window.

11.21 Add EBT Food Instrument

The Add EBT Food Instrument dialog allows the user to add prescribed benefits to compensate the participant for a late scheduled subsequent certification appointment. It is invoked when the user selects the Add EBT Food Instrument menu item from the EBT Food Instrument Management menu defined in Clinic – *Chapter 09 - Participant Folder*.

This option will be **disabled** if the FI_ENABLE_DELIVERYSYSTEMTYPE_EBT business rule is set to “N” (No) or if the clinic logged into is not EBT certification status is set to “Not Ready”.

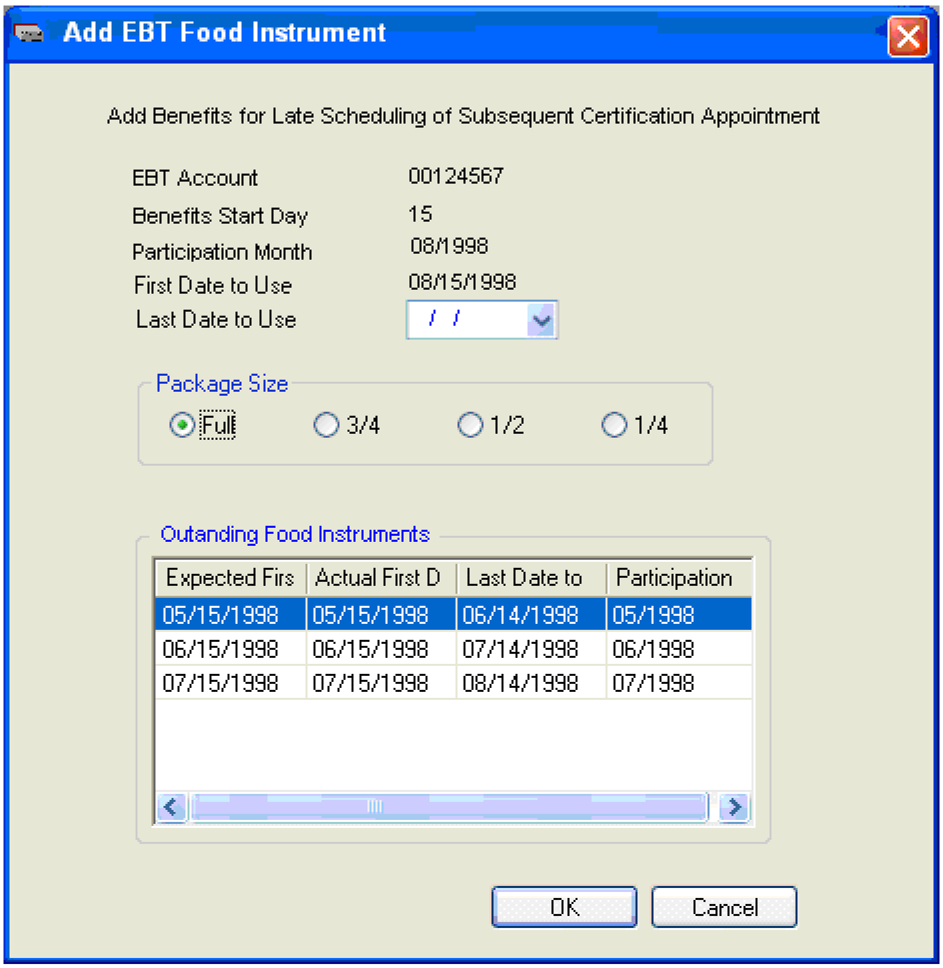

Figure 22 – Add EBT Food Instrument Dialog

11.21.1 Controls

This section describes the behavior of the controls on the EBT Food Instrument dialog.

11.21.1.1 EBT Account Text and Value Label

This control allows the user to view the EBT Account ID. It will display in the inverse color of the dialog.

11.21.1.2 Benefit Start Day Text and Value Label

This control allows the user to view the Household's EBT Account Benefits Start Day. It will display in the inverse color of the dialog.

11.21.1.3 Participation Month Text and Value Label

This control allows the user to view the Participation Month. It will display in the inverse color of the dialog.

11.21.1.4 First Date to Use Text and Value Label

This control allows the user to view the first date to use for the EBT food instruments to be issued. The value label will be filled with the value of the certification end date for the current certification period of the participant. It will display in the inverse color of the dialog.

11.21.1.5 Last Date to Use Date Control

This control allows the user to enter the last date to use for the EBT food instrument to be issued. The control will be enabled when the Add EBT Food Instrument dialog is active. The control will only accept entry of numeric digits. The mask on the box will be "##/##/####" to accept a date with a four digit year. It will default to the date that is the number of days in the current month past the value of the First Date to Use value label. The last date to use must align with the household EBT Account benefits start day.

11.21.1.6 Package Size Radio Button Group

This control allows the user to select the package size for the set of checks to be issued. The radio button group will be enabled when the Add Set radio button is selected. It consists of the following radio buttons:

- Full
- ¾
- ½
- ¼

The Full radio button will default to selected.

11.21.1.7 Outstanding Food Instruments Display Grid

This control allows the user to view the currently outstanding food instruments (EBT, Checks, vouchers, Direct Distribution) for the participant. The display grid is read only. It consists of the following columns:

- First Date to Use
- Last Date to Use
- Participation Month/Year

An entry will be added to the grid for valid participation month issued to the participant with a last date to use equal to or greater than the current system date. The grid will be sorted in chronological order by the value of the Expected First Date to Use column. The grid is read-only.

11.21.1.8 OK Button

This control allows the user to instruct the system to edit the values of the controls, add the EBT food instrument, and exit the Add EBT Food Instrument dialog. The OK button will be enabled when the Add EBT Food Instrument dialog is active. Characteristics for the OK button are defined in *Consistencies*.

11.21.1.9 Cancel Button

This control allows the user to exit the Add EBT Food Instrument dialog without replacing any checks. The Cancel button will be enabled when the Add EBT Food Instrument dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.21.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Add EBT Food Instrument dialog.

11.21.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to "Add EBT Food Instrument"

The OK button will be enabled when either of the following pairs of conditions is met:

- No Food Instruments (EBT, check, voucher, direct distribution) have been issued with a first date to use that is past the certification end date of the current certification period of the participant. (EBT Food Instruments, **set of checks, set of vouchers, set of direct distribution documents**)

- the current system date is less than or equal to 30 days before the certification end date of the current certification

  OR

- the participant is no longer in a valid certification period
- the current system date is less than or equal to the next Expected Last Date to Use which occurs after the certification end date

If the above conditions are not met and the OK button is disabled, the system will invoke a standard error message with the text "An EBT food instrument can not be added for this participant." Upon confirmation of the message, the system will exit the Add EBT Food Instrument dialog.

11.21.2.2 Edits

Upon selection of the OK button, the last date to use must align with the household EBT Account benefits start day. If not, the system will invoke a standard error message with the text "{control name} must align with the EBT account benefits period."

11.21.2.3 Add EBT Food Instrument

Upon successful completion of the above-listed edits, the system will add the EBT Food Instrument specified by the values in the Last Date to Use masked edit box and Package Size radio button group.

11.21.2.4 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the calling window.

11.22 Replace EBT Issued Benefits

The Replace EBT Issued Benefits dialog allows the user to replace prescribed benefits to compensate the participant for a food prescription change. It is invoked when the user selects the Replace EBT Issued Benefits menu item from the EBT Food Instrument Management menu defined in Clinic – *Chapter 09 - Participant Folder*.

This option will be **disabled** if the FI_ENABLE_DELIVERYSYSTEMTYPE_EBT business rule is set to "N" (No) or if the clinic logged into is not EBT certification status is set to "Not Ready".

The EBT food instrument is not replaced. Rather the difference in the prescribed food items that were issued and not yet redeemed will be voided and replaced with items from the updated food prescription.

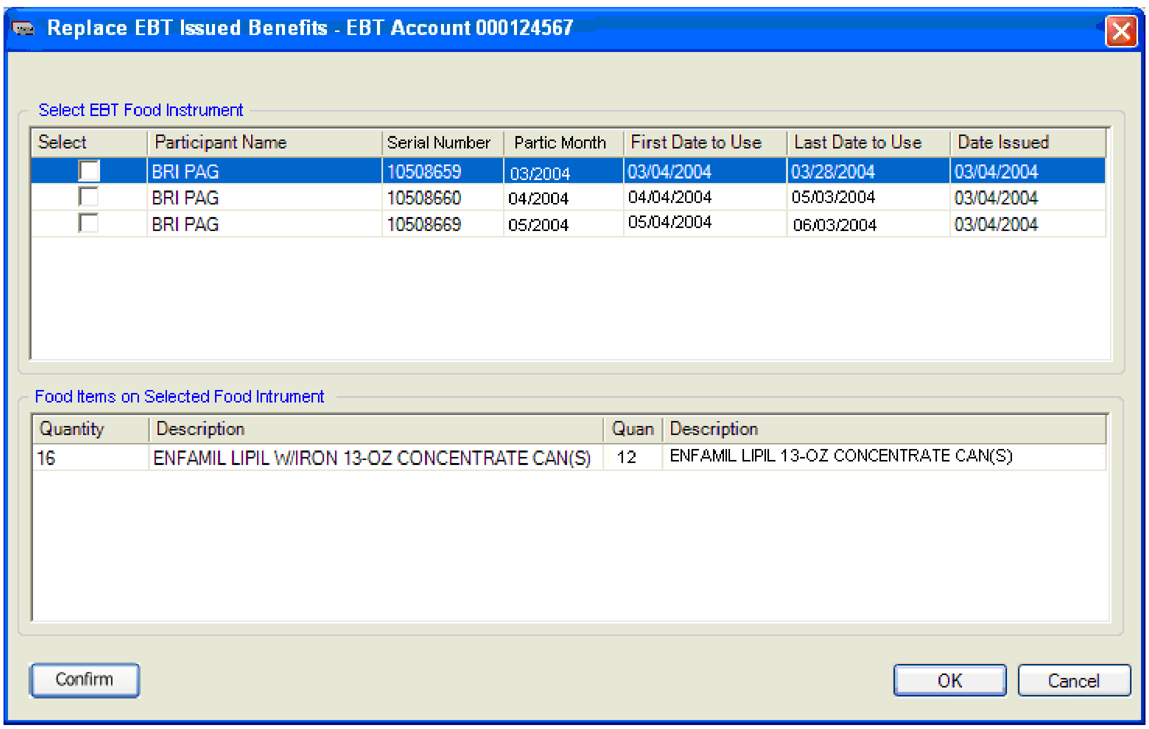

Figure 23 - Replace EBT Issued Benefits Dialog

11.22.1 Controls

This section describes the behavior of the controls on the Replace EBT Issued Benefits dialog.

11.22.1.1 Selected EBT Food Instruments Display Grid

This control allows the user to view the Selected EBT Food Instruments for the participant and select those to be replaced. The display grid will be enabled when Replace EBT Issued Benefits dialog is active. It consists of the following columns:

- Select
- Participant Name
- Serial Number
- Participation Month/Year
- First Date to Use
- Last Date to Use

An entry will be added to the grid for each EBT Food Instrument with issue benefits for the participant with a last date to use equal to or greater than the current system date. (Current through next two months of issuance) The grid will be sorted in chronological order by the value of the First Date to Use column. A mark may be placed in the Select column of each outstanding EBT Food Instrument with issue benefits to be replaced. The values in the remaining columns are read-only.

11.22.1.2 Confirm Button

This control allows the user to Confirm the change in issued benefits prior to actually replacing the benefits on the EBT food instrument. It will be enabled when an entry is selected in the Food Instrument selection grid.

11.22.1.3 OK Button

This control allows the user to instruct the system to edit the values of the controls, replace the indicated issued benefits, and exit the Replace EBT Issued Benefits dialog. The OK button will be enabled when the Replace EBT Food Instrument Items dialog is active. Characteristics for the OK button are defined in *Consistencies*.

11.22.1.4 Cancel Button

This control allows the user to exit the Replace EBT Issued Benefits dialog without replacing any checks. The Cancel button will be enabled when the Replace EBT Issued Benefits dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

11.22.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Replace EBT Issued Benefits dialog.

11.22.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to "Replace EBT Issued Benefits"

The OK button will be enabled when an EBT food instrument is issued to the participant with a last date to use that is greater than the current system date. It will be loaded into the grid.

If the OK button is disabled, the system will invoke a standard error message with the text "No EBT food instruments were found for this participant." Upon confirmation of the message, the system will exit the Replace EBT Issued Benefits dialog.

11.22.2.2 Edits

Upon selection of the OK button, at least one entry in the Outstanding Food Instruments display grid must be marked in the Select column.

11.22.2.3 Confirm Replace EBT Issued Benefits

Upon selection of the Confirm button, the system will display the Confirm Replace EBT Issued Benefits dialog.

11.22.2.4 Replace EBT Food Instrument

Upon successful completion of the above-listed edits, the system will save EBT food instrument items changes specified by the selected entries in the display grid.

11.22.2.5 Cancel

Upon selection of the Cancel button, the system will dismiss the dialog without saving and return to the calling window.

11.23 Confirm Replace EBT Issued Benefits

The Confirm Replace EBT Issued Benefits dialog allows the user to confirm replacing the prescribed benefits for the participant for a food prescription change. It is invoked when the user selects the Confirm button on the Replace EBT Issued Benefits dialog.

This option will be **disabled** if the FI_ENABLE_DELIVERYSYSTEMTYPE_EBT business rule is set to “N” (No) or if the clinic logged into is not EBT certification status is set to “Not Ready”.

The EBT food instrument is not replaced. Rather the difference in the prescribed food items that were issued and not yet redeemed will be voided and replaced with items from the updated food prescription. This is the net effect on the food items or the food package issued.

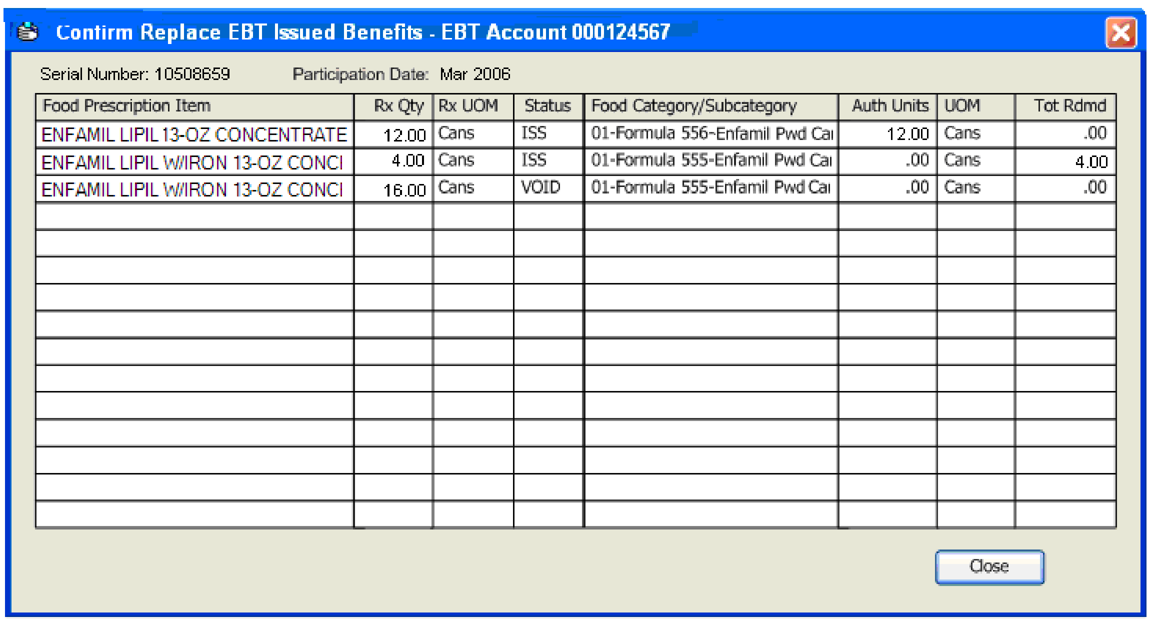

Figure 24 - Confirm Replace EBT Issued Benefits Dialog

11.23.1 Controls

This section describes the behavior of the controls on the Confirm Replace EBT Issued Benefits dialog.

11.23.1.1 Serial Number Text and Value Label

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

11.23.1.2 Participation Date Text and Value Label

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

11.23.1.3 Food Items Display Grid

This control allows the user to view the food items issued and the status. The display grid contains the following columns:

- Item Issued
- Item Quantity
- Item Unit of Measure (Benefit UOM)
- Item Status
- EBT Food Category/Subcategory
- EBT Food Category/Subcategory Authorized Units (EBT Card Decrement Value)
- EBT Food Category/Subcategory Unit of Measure
- Total Redeemed Units To-Date

The grid will contain an entry for each food item issued on the food instrument. The entries will be sorted in the order that the food items were added to the food instrument. The data in the grid is read-only.

11.23.1.4 Close Button

This control will allow the user to exit the Food Instrument Items Dialog and return to the Food Instrument Detail Dialog. The Close button will be enabled when the Dialog is active. Characteristics for the Close button are defined in *Consistencies*.

11.23.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Replace EBT Issued Benefits dialog.

11.23.2.1 Initializing the Interface

Upon initial display of the dialog, the title bar text will be set to "Confirm Replace EBT Issued Benefits"

11.23.2.2 Edits

None

11.23.2.3 Close

Upon selection of the Close button, the system will dismiss the dialog without saving and return to the calling window.