

**M - REFERRALS AND OTHER PROGRAMS.....2**

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## M - Referrals and Other Programs

### M.1 Referrals and Other Programs Panel

The Referrals panel allows the user to view the previous referrals of the participant to programs external to WIC and add new referrals. Additionally, the user may view and adjust the other programs in which the participant participates. Tribes crossing state boundaries may record and refer to external programs and organizations from more than one state. The Referrals panel is invoked from the following user actions:

- Selecting the Referrals tab in the Participant Folder.
- Selecting the Referrals link on the Certification Guided Script window.

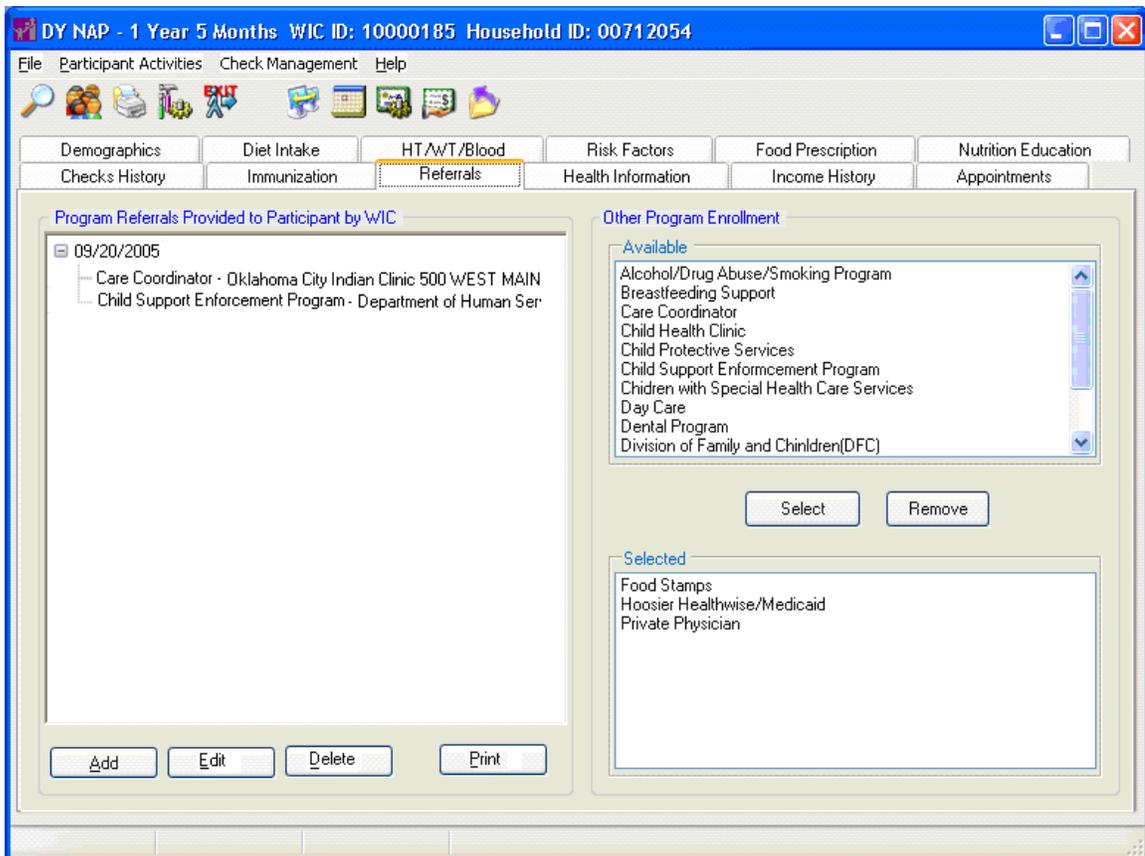


Figure 1 - Referrals Tab (Participant Folder)

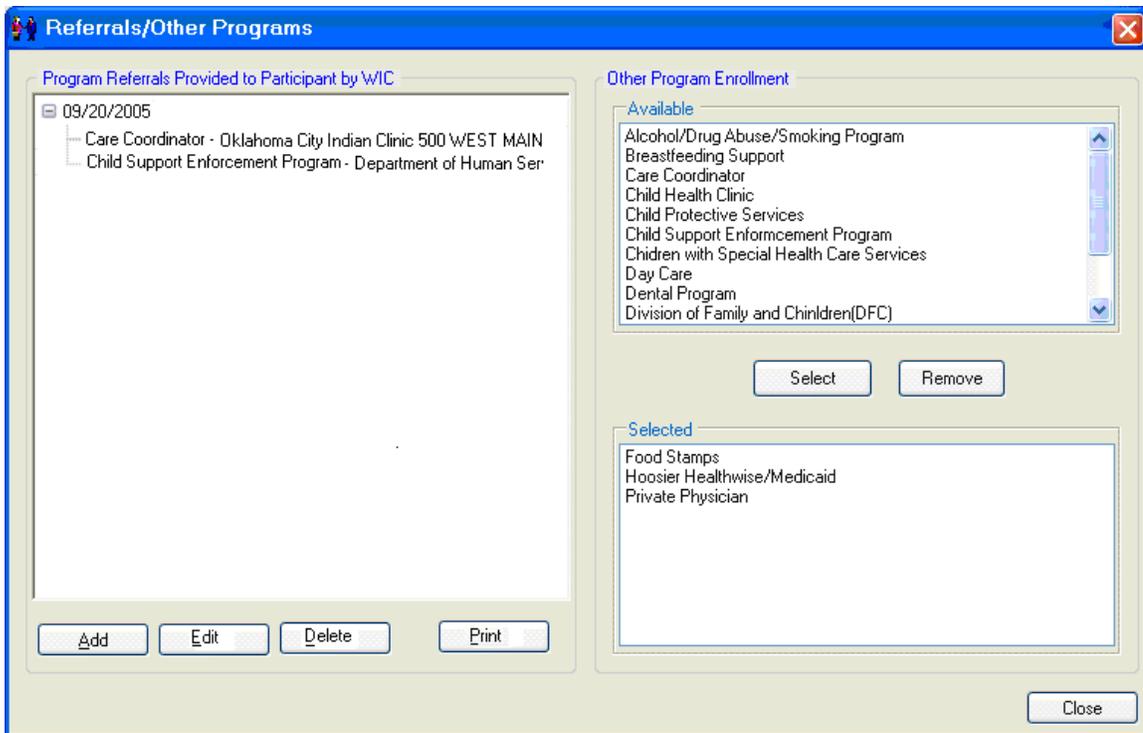


Figure 2 - Referrals Dialog (Certification Guided Script)

### M.1.1 Controls

This section describes the behavior of the controls on the Referrals panel.

#### *M.1.1.1 Referral Contact Display Tree (Program Referrals Provided to Participant by WIC)*

This control allows the user to view the previous referral contacts made for the participant. The display grid will be enabled when the Referrals panel is active. It will consist of the following hierarchical structure for the selected participant:

- Referral Contact Date (Date)
- Referral Program Name – Organization (if applicable)

The data on the grid will be read-only.

#### *M.1.1.2 Add Button*

This control allows the user to add referral contact information for the participant. The Add button will be enabled when the Referrals panel is active. It has a mnemonic of “A”.

### *M.1.1.3 Edit Button*

This control allows the user to edit referral contact information for the participant. The Edit button will be enabled when the Referrals panel is active from cert-guided script for current system date or from the participant folder if the referral contact was made on the current system date and it is not linked to a certification. It has a mnemonic of “E”

### *M.1.1.4 Delete Button*

This control allows the user to delete referral contact information for the participant. The Delete button will be enabled when the Referrals panel is active from cert-guided script for current system date or from the participant folder if the referral contact was made on the current system date and it is not linked to a certification. It has a mnemonic of “D”.

### *M.1.1.5 Print Button*

This control allows the user to print the [Participant Referral List](#) for the participant. The Print button will be enabled when the Referrals panel is active. It has a mnemonic of “P”.

### *M.1.1.6 Available List View*

This control allows the user to view the other programs for participation that are available to your state but have not been selected. The list view will be enabled when the Referrals panel is active. It will be filled from a list of State-defined and Agency programs where the Program.RefAgencyState equals the Household.PhysicalState of the participant and Clinic programs associated with the selected location from the Program table. The programs that are displayed in the Selected list view are removed from this list. Multiple selections are allowed.

### *M.1.1.7 Select Button*

This control allows the user to add the currently selected other programs in which participant is enrolled from the Available list view to the Selected list view. The select button will be enabled when an entry is selected in the Available list view.

### *M.1.1.8 Remove Button*

This control allows the user to remove the currently selected other programs in the Selected list view and place it back in the Available list view. The remove button will be enabled when an entry is selected in the Selected list view.

### *M.1.1.9 Selected List View*

This control allows the user to view the other programs for participation that have been selected for the participant. The list view will be enabled when the Referrals panel is active. It will list the programs that are presently selected for the participant from the ReferralContactItem table. The user may make multiple selections from this list.

## **M.1.2 Processes**

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

### *M.1.2.1 Initializing the Interface*

Upon initial presentation of the panel:

- The Referral Contact display tree will be populated with entries for all of the referral contacts for the participant. The entries will be sorted in reverse-chronological order by the Date node. The entries will be sub-sorted in ascending alphabetical order by the Program node.
- The Available list view display a list of Programs available for the State and Location for the selected participant.
- The Selected list view will display all ReferralContactItems selected for the selected participant.

### *M.1.2.2 Add Referral Contact Information*

Upon selection of the Add button:

- The system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Referrals.Add or FullControl) to add a referral contact, the system will invoke a standard error message with the text “You do not have the necessary permissions to add referral contact information. Please see the supervisor.”
- If the user has the appropriate permissions, the system will invoke the [Add Referral Contact Information Dialog](#). Upon return refresh the Referral Contact control to display the programs currently selected.

### *M.1.2.3 Edit Referral Contact Information*

Upon selection of the Edit button:

- The selected item can only be edited if it was added today. The system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Referrals.FullControl) to edit a referral contact, the system will invoke a standard error message with the text “You do not have the necessary permissions to edit referral contact information. Please see the supervisor.”

- If the user has the appropriate permissions, the system will invoke the Edit Referral Contact Information Dialog. Upon return refresh the Referral Contact control to display the programs currently selected.

#### *M.1.2.4 Delete Referral Contact Information*

Upon selection of the Add button:

- The system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Referrals.Add or FullControl) to delete a referral contact, the system will invoke a standard error message with the text “You do not have the necessary permissions to delete referral contact information. Please see the supervisor.”
- If the user has the appropriate permissions, the system will display a confirmation message with the text, “Are you sure you want to delete the selected referral?” Select ‘Yes’, the system will delete the selected referral, return the user to the Referrals panel and refresh the Referral Contact tree. Select ‘No’, the system will return the user to the Referrals panel without deleting.

#### *M.1.2.5 Print Participant Referral List*

Upon selection of the Print button, the system will generate and print the [Participant Referral List](#) as defined in this document to the default report printer selected. (see *System Tools*).

#### *M.1.2.6 Select Other Program for Participation*

Upon selection of the select button:

- The system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Referrals.Add or FullControl) to add other programs for participation, the system will invoke a standard error message with the text “You do not have the necessary permissions to add another program for participation. Please see the supervisor.”
- If the user has the appropriate permissions, the system will move the selected program(s) from the Available list view to the Selected list view.

#### *M.1.2.7 Remove Other Program for Participation*

Upon selection of the remove button:

- The system will check the permissions of the currently logged-on user. If the user does not have the appropriate permissions (Referrals.FullControl) to remove other programs for participation, the system will invoke a standard error message with the text “You do not have the necessary permissions to remove another program for participation. Please see the supervisor.”

- If the user has the appropriate permissions, the system will move the selected program(s) from the Selected list view to the Available list view.

#### *M.1.2.8 Edits*

There are currently no edits defined.

#### *M.1.2.9 Saving the Data*

Upon selection of the Close button or switching tabs, the system will save the data as defined in the Data Map for this dialog.

## M.2 Add Referral Contact Information

The Add Referral Contact Information Dialog allows the user to add referral contact information for the participant. It is invoked in response to the following actions:

- Selecting the Add button on the Referrals tab of the Participant Folder.
- Selecting the Edit button on the Referrals tab of the Participant Folder
- Selecting the Add button on the Referrals dialog of the Certification Guided Script
- Selecting the Edit button on the Referrals dialog of the Certification Guided Script

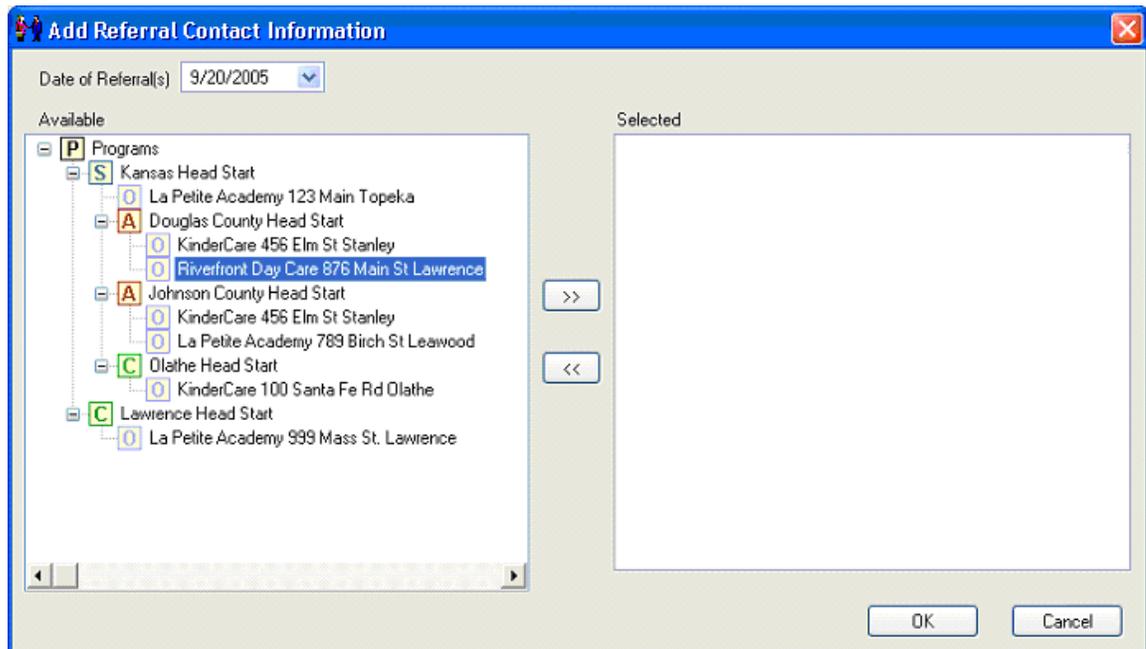
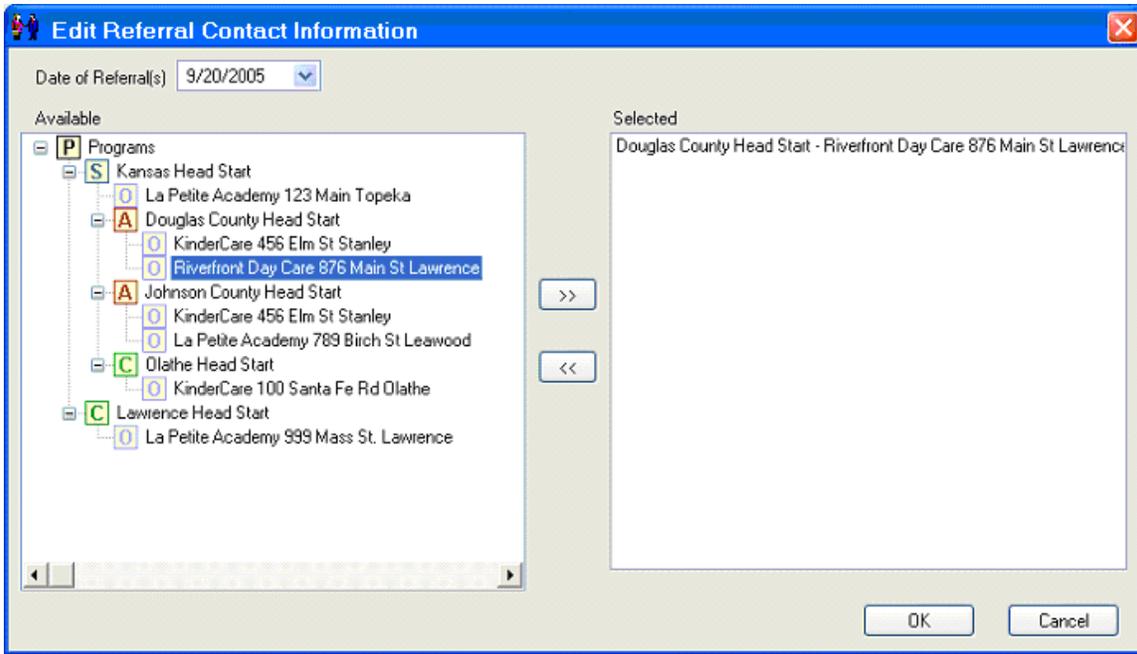


Figure 3 - Add Referral Contact Information Dialog



**Figure 4 - Edit Referral Contact Information Dialog**

### M.2.1 Controls

This section describes the behavior of the controls on the Add/Edit Referral Contact Information Dialog.

#### M.2.1.1 Date of Referral(s)

This control allows the user to enter the date on which the referral contact was performed. The date control will be enabled and default to the current system date when the Referral Contact Information dialog is active in add mode. It will be disabled and display the saved value when the dialog is active in Edit mode. The date control will only accept entry of numeric digits. The mask on the box will be “###/###/####” to accept a date with a four digit year.

#### M.2.1.2 Available Display Tree

This control allows the user to select Programs or Organizations to which the participant was referred. The tree will be enabled when the Add or Edit Referral Contact Information Dialog is active. The user may select and add multiple Programs or Organizations one at a time.

The tree will display the following programs and information from the following tables:

StateProgram	Listing of all state level programs
StateProgramOrganization	Cross reference of organizations that are associated with

	state level programs
AgencyProgram	Listing of all agency level programs
AgencyProgramLocation	Cross reference of locations that are associated with agency level programs
AgencyProgramOrganization	Cross reference of organizations that are associated with agency level programs
ClinicProgram	Listing of all clinic level programs
ClinicProgramLocation	Cross reference of locations that are associated with clinic level programs
ClinicProgramOrganization	Cross reference of organizations that are associated with clinic level programs

### *M.2.1.3 Selected List*

This control allows the user to select the programs and organizations to which the participant was referred. The tree will be enabled when the Add or Edit Referral Contact Information Dialog is active. It will display previously selected programs or organizations for the participant. Multiple selection is allowed.

### *M.2.1.4 Add Button*



The Add button will be enabled when the Add/Edit Referral Contact dialog is active and a selection is made in the Available display tree.

### *M.2.1.5 Remove Button*



The Remove button will be enabled when the Add/Edit Referral Contact dialog is active and a selection is made in the Selected list.

### *M.2.1.6 OK Button*

The OK button will be enabled when the Add Referral Contact Information Dialog is active (See the Processes section below). Characteristics for the OK button are defined in *Consistencies*.

### *M.2.1.7 Cancel Button*

The Cancel button will be enabled when the Add Referral Contact Information Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## M.2.2 Processes

This section describes the processes (navigation) that takes place as a result of the actions taken on the Add Referral Contact Information Dialog.

### M.2.2.1 *Initializing the Interface*

Upon initial presentation of the dialog:

In add mode

- The title bar text will be set to “Add Referral Contact Information”
- The Date of Referral(s) will default to the current system date and will be enabled.
- The Available display tree will display all State, Agency and Clinic programs and organizations where the StateRefAgency equals the Household.PhysicalState and the location of the programs are available for the selected Agency and Clinic. .No item in the tree will be initially selected.
- The Selected list will be initially blank.

In edit mode

- The title bar text will be set to “Edit Referral Contact Information”
- The Date of Referral(s) will display the previously saved value and will be disabled.
- The Available display tree will display all State, Agency and Clinic programs and organizations where the StateRefAgency equals the Household.PhysicalState and the location of the programs are available for the selected Agency and Clinic. No item in the tree will be initially selected.
- The Selected list will display previously saved values as defined in the data map.

### M.2.2.2 *Edits*

Upon selection of the OK button:

- If an entry is not made in the Referral Contact Date masked edit box, the system will invoke a standard error message with the text “An entry is required for the {control label}”.
- If the value of the Referral Contact Date masked edit box is greater than the system date, the system will invoke a standard error message with the text “Date entered must be less than or equal to today’s date.”
- If the value of the Referral Contact Date masked edit box is more than 1 year prior to the current system date, the system will invoke a standard error message with the text, “The date entered cannot be more than 365 days in the past.”

- If the value of the Referral Contact Date masked edit box is less than the date entered for a previously saved referral record for the participant, the system will invoke a standard error message with the text, “The date entered must be greater than the contact date for the most recent referral.”
- If the Selected list is empty, the system will invoke a standard error message with the text “There must be at least one entry in the Selected list.”
- If the user attempts to select the same program to add to the Selected list, the system will invoke a standard error message with the text “This program is already selected.”
- If the participant is referred to a program more than once per contact date, the system will invoke a standard error message with the text, “A referral to this program has already been entered for this date.”
- The number of agencies selected in the Selected list box plus the referral contacts that already exist for the given date may not exceed the value of the ReferralsPerDay business rule. If the number does exceed the business rule value, the system will invoke a standard error message with the text, “Number of referrals exceeds maximum of ‘X’ allowed.” Where ‘X’ represents the value of the ReferralsPerDay business rule.

#### *M.2.2.3 Saving the Data*

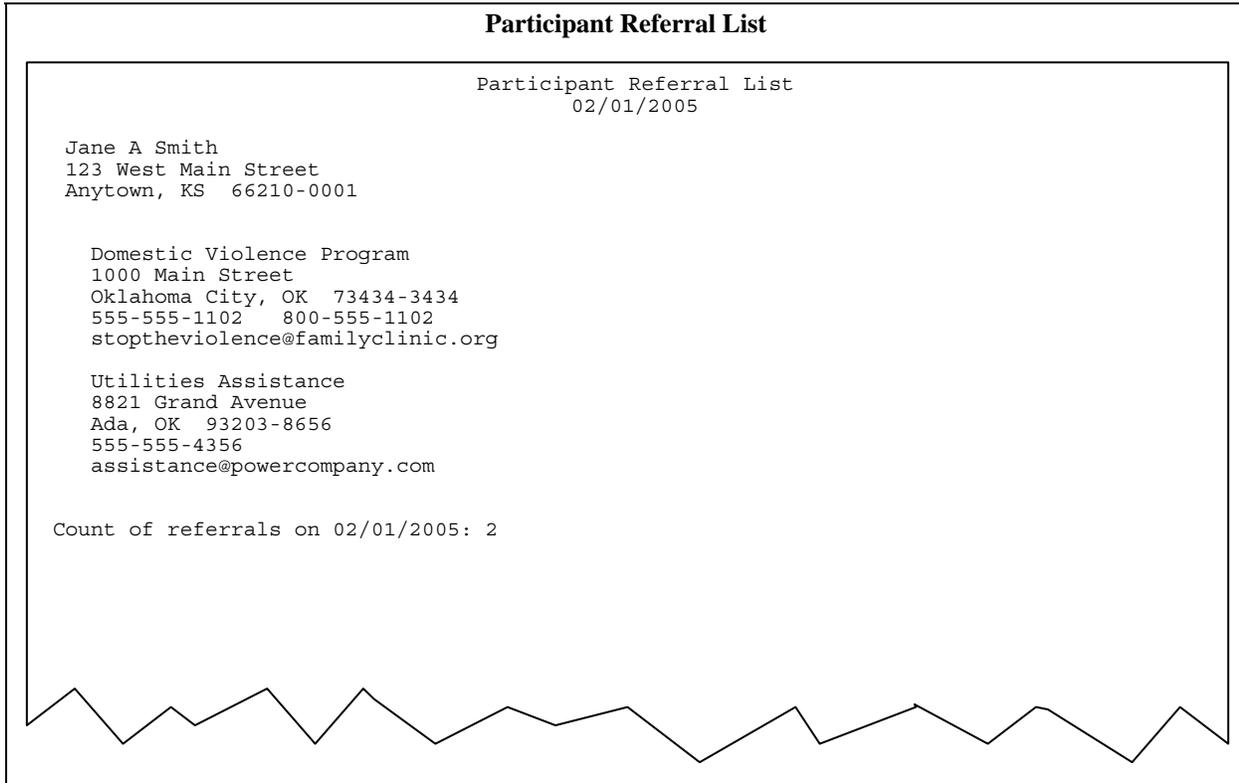
Upon successful completion of the above-listed edits, the system will return the user to the Referrals panel and refresh the Referral Contact display tree with the Selected Program(s) and/or Organization(s).

#### *M.2.2.4 Cancel*

Upon successful Cancel button, the system will dismiss the dialog without saving and return the user to the calling dialog or window.

### ***M.3 Participant Referral List***

This report allows the user to print a list of the programs and organizations where the participant was referred on the current system date. The Participant Referral List is generated when the user selects the [Print Button](#) on the [Referrals Panel](#).



#### **M.3.1 Data Elements**

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

##### ***M.3.1.1 Report Title***

The title of the report will be the text “Participant Referral List” and the date of the report.

###### **M.3.1.1.1 Origin of Data Element**

The date of the report will come from the current system date.

###### **M.3.1.1.2 Format**

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

##### ***M.3.1.2 Client Name***

This value will be the full name of the client.

#### M.3.1.2.1 Origin of Data Element

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

#### M.3.1.2.2 Format

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

### *M.3.1.3 Client Mailing Address*

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

#### M.3.1.3.1 Origin of Data Element

The value will be taken from the Mail-Address of the HOUSEHOLD entity of the client.

#### M.3.1.3.2 Format

The value will print as its literal value.

### *M.3.1.4 Client Mailing City*

This value will be the mailing city of the household of the client.

#### M.3.1.4.1 Origin of Data Element

The value will be taken from the Mail-City of the HOUSEHOLD entity of the client.

#### M.3.1.4.2 Format

The value will print as its literal value.

### *M.3.1.5 Client Mailing State*

This value will be the mailing state of the household of the client.

#### M.3.1.5.1 Origin of Data Element

The value will be taken from the Mail-State of the HOUSEHOLD entity of the client.

#### M.3.1.5.2 Format

The value will print as its literal value.

### *M.3.1.6 Client Mailing ZIP Code*

This value will be the mailing ZIP code of the household of the client.

#### M.3.1.6.1 Origin of Data Element

The value will be taken from the Mail-ZIP of the HOUSEHOLD entity of the client.

#### M.3.1.6.2 Format

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

#### *M.3.1.7 Referral Agency Name*

This value will be the name of the program referral.

##### M.3.1.7.1 Origin of Data Element

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

##### M.3.1.7.2 Format

The value will print as its literal value.

#### *M.3.1.8 Referral Agency Address*

This value will be the address of the program referral.

##### M.3.1.8.1 Origin of Data Element

The value will be taken from the Address1 and Address2 attributes of the Organization entity.

##### M.3.1.8.2 Format

The value will print as its literal value.

#### *M.3.1.9 Referral Agency City*

This value will be the city where the program referral is located.

##### M.3.1.9.1 Origin of Data Element

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

##### M.3.1.9.2 Format

The value will print as its literal value.

#### *M.3.1.10 Referral Agency State*

This value will be the state where the program referral is located.

##### M.3.1.10.1 Origin of Data Element

The value will be taken from the StateCd attribute of the Organization entity.

##### M.3.1.10.2 Format

The value will print as its literal value.

### *M.3.1.11 Referral Agency ZIP Code*

This value will be the Zip code of the program referral.

#### M.3.1.11.1 Origin of Data Element

The value will be taken from the ZipCode attribute of the Organization entity.

#### M.3.1.11.2 Format

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

### *M.3.1.12 Referral Agency Telephone 1*

This value will be the first telephone number for the program referral.

#### M.3.1.12.1 Origin of Data Element

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

#### M.3.1.12.2 Format

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

### *M.3.1.13 Referral Agency Telephone 2*

This value will be the second telephone number for the program referral.

#### M.3.1.13.1 Origin of Data Element

The value will be taken from the Telephone2 attribute of the Organization entity.

#### M.3.1.13.2 Format

The value will print in ###-###-#### format. If the second telephone number is not available then nothing will print.

### *M.3.1.14 Referral Agency Email Address*

This value will be the email address for the program referral.

#### M.3.1.14.1 Origin of Data Element

The value will be taken from the EmailAddress attribute of the Organization entity.

#### M.3.1.14.2 Format

The value will print as its literal value. If the email address is not available then nothing will print.

### **M.3.2 Filter Criteria**

#### *M.3.2.1 Referral Information for Active Participant*

Referral information for the currently select participant will be included in the report.

#### *M.3.2.2 Referrals Made on Current Date*

Only referral information that was recorded on the current system date will be included in the report.

### **M.3.3 Sort Order**

#### *M.3.3.1 Referral Agency Name*

The report will be sorted by the program referral name.

### **M.3.4 Control Breaks**

No control breaks are defined for this report.

### **M.3.5 Grand Total**

#### *M.3.5.1 Referrals*

A final count of the number of referrals made on the current system date will print on the last page of the report.