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## **9. Caseload Reports**

All reports defined in this document are selected from the Generate Reports dialog described in State Office - [Chapter 08 - System Outputs](#)

### **End of Month Processing**

Data from the WIC food instrument and participant systems is summarized in the end of month process to feed reports.

If the data is inserted, updated or replaced via an import of data, the outcome of the end of month summarizing and the data reported will be affected. The State is responsible for the integrity of the data imported into the database. Monthly, quarterly, yearly, etc. reports need to be run based on the monthly hard close date. The data issues will need to be tracked back to the system that generated the import files.

## 9.1 Generate Unduplicated Enrollment-Yearly (State Fiscal Year) Report Dialog

When this report is selected, the system will display the Generate Unduplicated Enrollment-Yearly (State Fiscal Year) Report Dialog to select criteria for printing the Unduplicated Enrollment-Yearly (State Fiscal Year) Report.

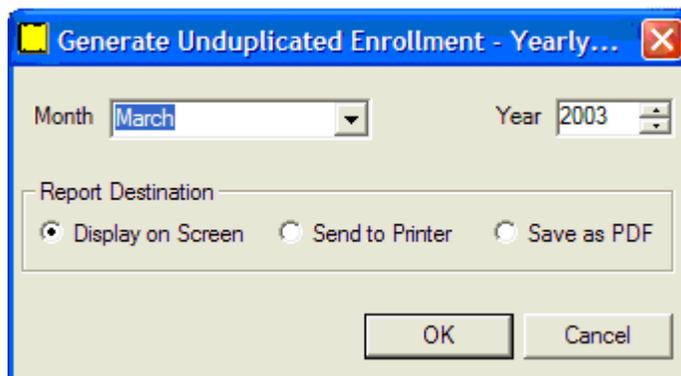


Figure 1 – Generate Unduplicated Enrollment-Yearly (State Fiscal Year) Report Dialog

### 9.1.1 Controls

#### 9.1.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Unduplicated Enrollment-Yearly (State Fiscal Year) Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.1.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Unduplicated Enrollment-Yearly (State Fiscal Year) Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

#### 9.1.1.3 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the Generate Unduplicated Enrollment-Yearly (State Fiscal Year) Report Dialog is enabled. It will default to Display on Screen.

#### 9.1.1.4 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Unduplicated Enrollment-Yearly (State Fiscal Year) Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

#### 9.1.1.5 Cancel Button

This control allows the user to exit the Generate Unduplicated Enrollment-Yearly (State Fiscal Year) Report Dialog. The control will be enabled when the Generate Unduplicated Enrollment-Yearly (State Fiscal Year) Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 9.1.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Unduplicated Enrollment-Yearly (State Fiscal Year) Report Dialog.

#### 9.1.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Unduplicated Enrollment – Yearly (State Fiscal Year) Report”
- The Month will default to the current month of the Process\_Control table.
- The Display on Screen radio button is initially selected.

#### 9.1.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Control

the system will display a standard error message with the text “A selection is required in the <control label>.”

- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”

- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Unduplicated Enrollment – Yearly (State Fiscal Year) Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Unduplicated Enrollment – Yearly (State Fiscal Year) Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Unduplicated Enrollment – Yearly (State Fiscal Year) Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Unduplicated Enrollment – Yearly (State Fiscal Year) Report dialog and return the user to the Generate Reports dialog.

## **9.2 Unduplicated Enrollment-Yearly (State Fiscal Year) Report (Output) CLD001**

The user may generate the Unduplicated Enrollment-Yearly (State Fiscal Year) Report from the Generate Unduplicated Enrollment-Yearly (State Fiscal Year) Report Dialog. This report will also be generated as part of the month-end process and is available at the state level only.

The Unduplicated Enrollment report is a month-by-month comparison of active enrollees and participants served. A cumulative total is also provided. Only state totals are printed. Unduplicated means the participant is counted only once during the specified year type.

Active enrollees for the first month is a count all active enrollees at the start of that month plus new certifications and transfers into the program during that month. Active enrollees for subsequent months are a count of all new certifications and transfers into the program during that month. Enrollees are counted in only one month's total for the reported year.

Participants served for the first month is a count of participants that were issued at least one food instrument for that month. Participants served for subsequent months are a count of all participants that were issued at least one food instrument for that month if that month is the first month of the year that the participant received a food instrument. Participants are counted in only one month's total for the reported year.

The issue month will be indicated with ISSD under the month name. The 30-day status month will be indicated with 30DY under the month name. When closeout for a month has been reached, C/O will print under the month name.

The state fiscal year report restarts calculations with July as the issuance month. The months of May and June will continue to be updated in the database for the previous year until these months reach closeout status. The updated data is available on reports for the previous fiscal year that are available through the Generate Unduplicated Enrollment-Yearly (State Fiscal Year) Report Dialog. The month-end process will print the report for the current fiscal year only.

CLD001	<STATE NAME DEPARTMENT OF HEALTH> UNDUPLICATED ENROLLMENT-YEARLY (STATE FISCAL YEAR) MONTH OF <JUNE 2003>												RUN DATE	XX/XX/XXXX	
														RUN TIME	XX:XX:XX
														PAGE:	XXX
	JUL 02	AUG 02	SEP 02	OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	CUM		
	C/O	C/O	C/O	C/O	C/O	C/O	C/O	C/O	C/O	C/O	30DY	ISSD	TOTAL		
ACTIVE															
ENROLLED	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX
PARTICIPANTS															
SERVED	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX
*** END OF LISTING ***															

### 9.2.1.1 Data Elements

#### 9.2.1.1.1 Month of

##### 9.2.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.2.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.2.1.1.2 Active Enrolled - month totals

##### 9.2.1.1.2.1 Origin of Data Element

This value is the total count of WIC participants from the Caseload\_Count\_Undup\_State entity where the Enrollment\_Part\_CYM attribute is equal to the reported month.

For the first month on the report, this total is a count of all active WIC enrollees at the start of the month plus new WIC certifications and transfers into the WIC program during that month.

For subsequent months on the report, this total is a count of all new WIC certifications and transfers into the WIC program during that month.

##### 9.2.1.1.2.2 Format

This value is a seven-digit number.

#### 9.2.1.1.3 Active Enrolled - Cumulative Total

##### 9.2.1.1.3.1 Origin of Data Element

This attribute is calculated by totaling the monthly totals for active enrolled year-to-date.

##### 9.2.1.1.3.2 Format

This value is a seven-digit number.

#### 9.2.1.1.4 Participants Served - month totals

##### 9.2.1.1.4.1 Origin of Data Element

This value is the total count of WIC participants from the Caseload\_Count\_Undup\_State entity where the Reported\_Part\_CYM attribute is equal to the reported month.

For the first month on the report, this total is a count of all WIC participants that received benefits during that month.

For subsequent months on the report, this total is a count of all WIC participants that received benefits for the first time in the reported year during that month.

#### *9.2.1.1.4.2 Format*

This value is a seven-digit number.

### **9.2.1.1.5 Participants Served - Cumulative Total**

#### *9.2.1.1.5.1 Origin of Data Element*

This attribute is calculated by totaling the monthly totals for participants served year-to-date.

#### *9.2.1.1.5.2 Format*

This value is a seven-digit number.

### **9.2.1.2 Filter Criteria**

#### **9.2.1.2.1 Active Enrollees**

See data element description for 'Active Enrolled - month totals'.

#### **9.2.1.2.2 Participants**

See data element description for 'Participants Served - month totals'.

### **9.2.1.3 Sort Order**

No sort order has been defined for this report.

### **9.2.1.4 Control Breaks**

No control breaks have been defined for this report.

### **9.2.1.5 Grand Total**

No grand totals have been defined for this report.

### **9.2.1.6 Frequency and Distribution**

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

### 9.3 Generate Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report Dialog

When this report is selected, the system will display the Generate Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report Dialog to select criteria for printing the Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report.



Figure 2– Generate Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report Dialog

#### 9.3.1 Controls

##### 9.3.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

##### 9.3.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

##### 9.3.1.3 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the Generate Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report Dialog is enabled. It will default to Display on Screen.

#### 9.3.1.4 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report Dialog is enabled. See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

#### 9.3.1.5 Cancel Button

This control allows the user to exit the Generate Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report Dialog. The control will be enabled when the Generate Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 9.3.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report Dialog.

#### 9.3.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Unduplicated Enrollment – Yearly (Federal Fiscal Year) Report”
- The Month will default to the current month of the Process\_Control table.
- The Display on Screen radio button is initially selected.

#### 9.3.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Control

the system will display a standard error message with the text “A selection is required in the <control label>.”

- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”

- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Unduplicated Enrollment – Yearly (Federal Fiscal Year) Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Unduplicated Enrollment – Yearly (Federal Fiscal Year) Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Unduplicated Enrollment – Yearly (Federal Fiscal Year) Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Unduplicated Enrollment – Yearly (Federal Fiscal Year) Report dialog and return the user to the Generate Reports dialog.

#### **9.4 Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report (Output) CLD002**

The user may generate the Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report from the Generate Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report Dialog. This report will also be generated as part of the month-end process and is available at the state level only.

The Unduplicated Enrollment is a month-by-month comparison of active enrollees and participants served. A cumulative total is also provided. Only state totals are printed. Unduplicated means the participant is counted only once during the specified year type.

Active enrollees for the first month is a count all active enrollees at the start of that month plus new certifications and transfers into the program during that month. Active enrollees for subsequent months are a count of all new certifications and transfers into the program during that month. Enrollees are counted in only one month's total for the reported year.

Participants served for the first month is a count of participants that were issued at least one food instrument for that month. Participants served for subsequent months are a count of all participants that were issued at least one food instrument for that month if that month is the first month of the year that the participant received a food instrument. Participants are counted in only one month's total for the reported year.

The issue month will be indicated with ISSD under the month name. The 30-day status month will be indicated with 30DY under the month name. When closeout for a month has been reached, C/O will print under the month name.

The state federal year report restarts calculations with October as the issuance month. The months of August and September will continue to be updated in the database for the previous year until these months reach closeout status. The updated data is available on reports for the previous fiscal year that are available through the Generate Unduplicated Enrollment-Yearly (Federal Fiscal Year) Report Dialog. The month-end process will print the report for the current fiscal year only.

CLD002	<STATE NAME DEPARTMENT OF HEALTH> UNDUPLICATED ENROLLMENT-YEARLY (FEDERAL FISCAL YEAR) MONTH OF <SEPTEMBER 2003>												RUN DATE	XX/XX/XXXX	
														RUN TIME	XX:XX:XX
														PAGE:	XXX
	OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN03	JUL 03	AUG 03	SEP 03	CUM		
	C/O	C/O	C/O	C/O	C/O	C/O	C/O	C/O	C/O	C/O	30DY	ISSD	TOTAL		
ACTIVE															
ENROLLED	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX
PARTICIPANTS															
SERVED	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX
*** END OF LISTING ***															

### 9.4.1.1 Data Elements

#### 9.4.1.1.1 Month of

##### 9.4.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.4.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.4.1.1.2 Active Enrolled - month totals

##### 9.4.1.1.2.1 Origin of Data Element

This value is the total count of WIC participants from the Caseload\_Count\_Undup\_Federal entity where the Enrollment\_Part\_CYM attribute is equal to the reported month.

For the first month on the report, this total is a count of all active WIC enrollees at the start of the month plus new WIC certifications and transfers into the WIC program during that month.

For subsequent months on the report, this total is a count of all new WIC certifications and transfers into the WIC program during that month.

##### 9.4.1.1.2.2 Format

This value is a seven-digit number.

#### 9.4.1.1.3 Active Enrolled - Cumulative Total

##### 9.4.1.1.3.1 Origin of Data Element

This attribute is calculated by totaling the monthly totals for active enrolled year-to-date.

##### 9.4.1.1.3.2 Format

This value is a seven-digit number.

#### 9.4.1.1.4 Participants Served - month totals

##### 9.4.1.1.4.1 Origin of Data Element

This value is the total count of WIC participants from the Caseload\_Count\_Undup\_Federal entity where the Reported\_Part\_CYM attribute is equal to the reported month.

For the first month on the report, this total is a count of all WIC participants that received benefits during that month.

For subsequent months on the report, this total is a count of all WIC participants that received benefits for the first time in the reported year during that month.

#### *9.4.1.1.4.2 Format*

This value is a seven-digit number.

### **9.4.1.1.5 Participants Served - Cumulative Total**

#### *9.4.1.1.5.1 Origin of Data Element*

This attribute is calculated by totaling the monthly totals for participants served year-to-date.

#### *9.4.1.1.5.2 Format*

This value is a seven-digit number.

### **9.4.1.2 Filter Criteria**

#### **9.4.1.2.1 Active Enrollees**

See data element description for 'Active Enrolled - month totals'.

#### **9.4.1.2.2 Participants**

See data element description for 'Participants Served - month totals'.

### **9.4.1.3 Sort Order**

No sort order has been defined for this report.

### **9.4.1.4 Control Breaks**

No control breaks have been defined for this report.

### **9.4.1.5 Grand Total**

No grand totals have been defined for this report.

### **9.4.1.6 Frequency and Distribution**

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

## 9.5 Generate Unduplicated Enrollment-Yearly (Calendar Year) Report Dialog

When this report is selected, the system will display the Generate Unduplicated Enrollment-Yearly (Calendar Year) Report Dialog to select criteria for printing the Unduplicated Enrollment-Yearly (Calendar Year) Report.

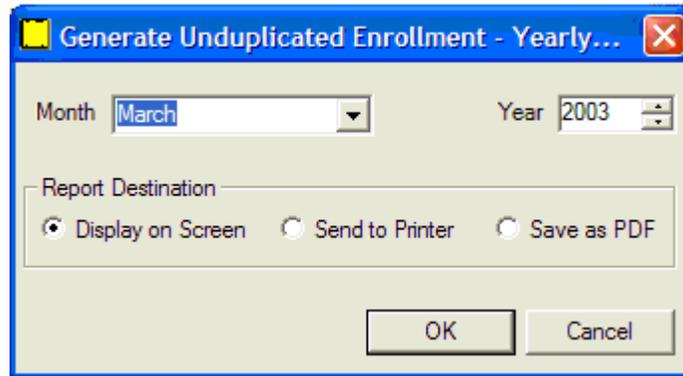


Figure 3 – Generate Unduplicated Enrollment-Yearly (Calendar Year) Report Dialog

### 9.5.1 Controls

#### 9.5.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Unduplicated Enrollment-Yearly (Calendar Year) Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.5.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Unduplicated Enrollment-Yearly (Calendar Year) Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

#### 9.5.1.3 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the Generate Unduplicated Enrollment-Yearly (Calendar Year) Report Dialog is enabled. It will default to Display on Screen.

#### 9.5.1.4 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Unduplicated Enrollment-Yearly (Calendar Year) Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

#### 9.5.1.5 Cancel Button

This control allows the user to exit the Generate Unduplicated Enrollment-Yearly (Calendar Year) Report Dialog. The control will be enabled when the Generate Unduplicated Enrollment-Yearly (Calendar Year) Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 9.5.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Unduplicated Enrollment-Yearly (Calendar Year) Report Dialog.

#### 9.5.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Unduplicated Enrollment – Yearly (Calendar Year) Report”
- The Month will default to the current month of the Process\_Control table.
- The Display on Screen radio button is initially selected.

#### 9.5.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Control

the system will display a standard error message with the text “A selection is required in the <control label>.”

- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”

- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Unduplicated Enrollment – Yearly (Calendar Year) Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Unduplicated Enrollment – Yearly (Calendar Year) Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Unduplicated Enrollment – Yearly (Calendar Year) Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Unduplicated Enrollment – Yearly (Calendar Year) Report dialog and return the user to the Generate Reports dialog.

## **9.6 Unduplicated Enrollment-Yearly (Calendar Year) Report (Output) CLD003**

The user may generate the Unduplicated Enrollment-Yearly (Calendar Year) Report from the Generate Unduplicated Enrollment-Yearly (Calendar Year) Report Dialog. This report will also be generated as part of the month-end process and is available at the state level only.

The Unduplicated Enrollment is a month-by-month comparison of active enrollees and participants served. A cumulative total is also provided. Only state totals are printed. Unduplicated means the participant is counted only once during the specified year type.

Active enrollees for the first month is a count all active enrollees at the start of that month plus new certifications and transfers into the program during that month. Active enrollees for subsequent months are a count of all new certifications and transfers into the program during that month. Enrollees are counted in only one month's total for the reported year.

Participants served for the first month is a count of participants that were issued at least one food instrument for that month. Participants served for subsequent months are a count of all participants that were issued at least one food instrument for that month if that month is the first month of the year that the participant received a food instrument. Participants are counted in only one month's total for the reported year.

The issue month will be indicated with ISSD under the month name. The 30-day status month will be indicated with 30DY under the month name. When closeout for a month has been reached, C/O will print under the month name.

The calendar year report restarts calculations with January as the issuance month. The months of November and December will continue to be updated for the previous year in the database until these months reach closeout status. The updated data is available on reports for the previous calendar year that are available through the Generate Unduplicated Enrollment (Calendar Year) Report Dialog. The month-end process will print the report for the current calendar year only.

CLD003	<STATE NAME DEPARTMENT OF HEALTH> UNDUPLICATED ENROLLMENT-YEARLY (CALENDAR YEAR) MONTH OF <DECEMBER 2003>												RUN DATE	XX/XX/XXXX	
														RUN TIME	XX:XX:XX
														PAGE:	XXX
	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	OCT 03	NOV 03	DEC 03	CUM		
	C/O	C/O	C/O	C/O	C/O	C/O	C/O	C/O	C/O	C/O	30DY	ISSD	TOTAL		
ACTIVE															
ENROLLED	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	
PARTICIPANTS															
SERVED	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	
*** END OF LISTING ***															

### 9.6.1.1 Data Elements

#### 9.6.1.1.1 Month of

##### 9.6.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.6.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.6.1.1.2 Active Enrolled - month totals

##### 9.6.1.1.2.1 Origin of Data Element

This value is the total count of WIC participants from the Caseload\_Count\_Undup\_Calendar entity where the Enrollment\_Part\_CYM attribute is equal to the reported month.

For the first month on the report, this total is a count of all active WIC enrollees at the start of the month plus new WIC certifications and transfers into the WIC program during that month.

For subsequent months on the report, this total is a count of all new WIC certifications and transfers into the WIC program during that month.

##### 9.6.1.1.2.2 Format

This value is a seven-digit number.

#### 9.6.1.1.3 Active Enrolled - Cumulative Total

##### 9.6.1.1.3.1 Origin of Data Element

This attribute is calculated by totaling the monthly totals for active enrolled year-to-date.

##### 9.6.1.1.3.2 Format

This value is a seven-digit number.

#### 9.6.1.1.4 Participants Served - month totals

##### 9.6.1.1.4.1 Origin of Data Element

This value is the total count of WIC participants from the Caseload\_Count\_Undup\_Calendar entity where the Reported\_Part\_CYM attribute is equal to the reported month.

For the first month on the report, this total is a count of all WIC participants that received benefits during that month.

For subsequent months on the report, this total is a count of all WIC participants that received benefits for the first time in the reported year during that month.

#### *9.6.1.1.4.2 Format*

This value is a seven-digit number.

### **9.6.1.1.5 Participants Served - Cumulative Total**

#### *9.6.1.1.5.1 Origin of Data Element*

This attribute is calculated by totaling the monthly totals for participants served year-to-date.

#### *9.6.1.1.5.2 Format*

This value is a seven-digit number.

### **9.6.1.2 Filter Criteria**

#### **9.6.1.2.1 Active Enrollees**

See data element description for 'Active Enrolled - month totals'.

#### **9.6.1.2.2 Participants**

See data element description for 'Participants Served - month totals'.

### **9.6.1.3 Sort Order**

No sort order has been defined for this report.

### **9.6.1.4 Control Breaks**

No control breaks have been defined for this report.

### **9.6.1.5 Grand Total**

No grand totals have been defined for this report.

### **9.6.1.6 Frequency and Distribution**

This report can be generated on demand and will be generated during the month-end process, if selected by the state.

## 9.7 Generate Enrollees by Age and Race/Ethnicity Report Dialog

When this report is selected, the system will display the Generate Enrollees by Age and Race/Ethnicity Report Dialog to select criteria for printing the Enrollees by Age and Race/Ethnicity Report.

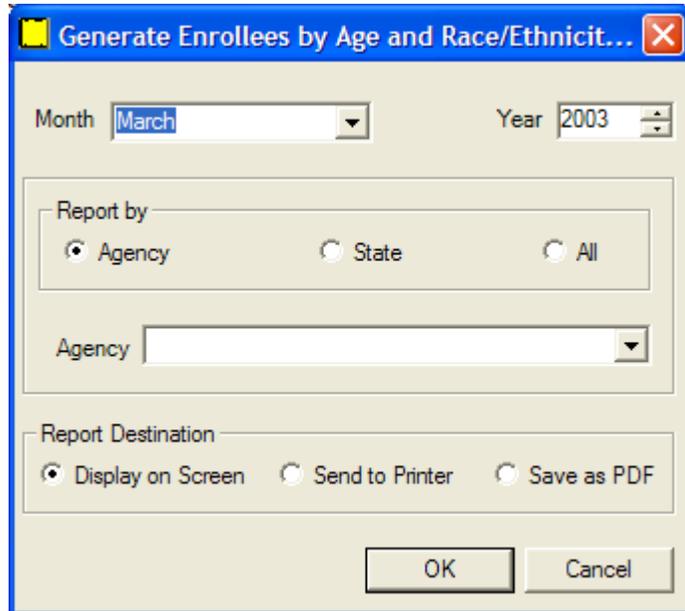


Figure 4 – Generate Enrollees by Age and Race/Ethnicity Report Dialog

### 9.7.1 Controls

#### 9.7.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Enrollees by Age and Race/Ethnicity Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.7.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Enrollees by Age and Race/Ethnicity Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.7.1.3 Report By Radio Button

This control allows the user to select a report break. The options are agency break only, state grand total only or all. The control will be enabled when the Generate Enrollees by Age and Race/Ethnicity Report Dialog is enabled. It will default to Agency.

### 9.7.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Enrollees by Age and Race/Ethnicity Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.7.1.5 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Enrollees by Age and Race/Ethnicity Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.7.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Enrollees by Age and Race/Ethnicity Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 9.7.1.7 Cancel Button

This control allows the user to exit the Generate Enrollees by Age and Race/Ethnicity Report Dialog. The control will be enabled when the Generate Enrollees by Age and Race/Ethnicity Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.7.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Enrollees by Age and Race/Ethnicity Report Dialog.

### 9.7.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Enrollees by Age and Race/Ethnicity Report”
- The Month will default to the current month of the Process\_Control table.
- The Report by Agency radio button is initially selected.

- The Display on Screen radio button is initially selected.

#### 9.7.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Enrollees by Age and Race/Ethnicity Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Enrollees by Age and Race/Ethnicity Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Enrollees by Age and Race/Ethnicity Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Enrollees by Age and Race/Ethnicity Report dialog and return the user to the Generate Reports dialog.

### **9.8 Enrollees by Age and Race/Ethnicity Report (Output) CLD004**

The user may generate the Enrollees by Age and Race/Ethnicity Report from the Generate Enrollees by Age and Race/Ethnicity Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual agency summaries and the state summary will be printed.

The Enrollees by Age and Race/Ethnicity is an analysis of enrollees who are eligible to receive food instruments within a valid certification period. The report is broken down by age groups and cross-referenced with race/ethnicity. Additional age group attributes are included to give a total for the number of infants under one year old, children one to five years old, and women. A total is also printed for all the enrollees in all age groups for each race/ethnicity category.

When an enrollee's age changes during the reported month, the enrollee's age at the end of the month is used for this report (i.e. when an enrollee's age changes from 24 to 25 years old during the reported month, the enrollee is counted in the 25 - 29 age group).

When the age of the enrollee could place the enrollee in multiple groups, the enrollee will be counted in the higher age group (i.e. an enrollee that is two years old will be counted in the 02-03 years group instead of the 01-02 years group).

NOTE: Because of space, the following report mock-up does not include commas when formatting the data. The production report will not include commas either.

CLD004		<STATE NAME DEPARTMENT OF HEALTH> ENROLLEES BY AGE AND RACE/ETHNICITY MONTH OF <MARCH 2003>														RUN DATE XX/XX/XXXX	
																RUN TIME XX:XX:XX	
																PAGE: XXX	
<AGENCY OR STATE TOTAL>																	
RACE/ETHNICITY																	
MONTHS			YEARS														
00-06	06-12	TOT I	01-02	02-03	03-04	04-05	TOT C	<15	15-19	20-24	25-29	30-34	35-39	40-44	45+	TOT W	TOTAL
XX -	XXXXXXXXXXXXXXXXXXXXXXXXXXXX		XXXXX	XXXXX													
XX -	XXXXXXXXXXXXXXXXXXXXXXXXXXXX		XXXXX	XXXXX													
XX -	XXXXXXXXXXXXXXXXXXXXXXXXXXXX		XXXXX	XXXXX													
TOTAL	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX
*** END OF LISTING ***																	

### 9.8.1.1 Data Elements

#### 9.8.1.1.1 Month of

##### 9.8.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.8.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.8.1.1.2 Agency / State Total

##### 9.8.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

When reporting agency data, the agency code and description will be printed.

When reporting state data, the text description of "State Total" will be printed.

##### 9.8.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.8.1.1.3 Race/Ethnicity

##### 9.8.1.1.3.1 Origin of Data Element

This code value comes from the Race\_Ethnicity attribute of the Caseload\_Count\_Enrollment entity. The description value comes from Description attribute of the ReferenceDictionary for the associated Race\_Ethnicity code value.

##### 9.8.1.1.3.2 Format

The code is a two-character value. The description is a thirty-character value.

#### 9.8.1.1.4 Enrollees Within Age Groups

##### 9.8.1.1.4.1 Origin of Data Element

This value is the count of selected participants. Participants are grouped by age and race/ethnicity.

The age value is calculated based on the DateOfBirth attribute on the Member entity. Enrollees are counted in the age group that represents their age at the end of the month. If an enrollee can be included in more than one age group, the enrollee is counted in the higher age group.

#### *9.8.1.1.4.2 Format*

This value is a five-digit number.

### 9.8.1.1.5 Age Groups Totals – Tot I

#### *9.8.1.1.5.1 Origin of Data Element*

This value is the count of participants in the zero to six month and six to twelve month age ranges for the race/ethnicity.

#### *9.8.1.1.5.2 Format*

This value is a five-digit number.

### 9.8.1.1.6 Age Groups Totals – Tot C

#### *9.8.1.1.6.1 Origin of Data Element*

This value is the count of participants in the one-two, two-three, three-four, and four-five year age ranges for the race/ethnicity.

#### *9.8.1.1.6.2 Format*

This value is a five-digit number.

### 9.8.1.1.7 Age Groups Totals – Tot W

#### *9.8.1.1.7.1 Origin of Data Element*

This value is the count of participants in the under 15, 15-19, 20-24, 25-29, 30-34, 35-39, 40-44 and 45+ year age ranges for the race/ethnicity.

#### *9.8.1.1.7.2 Format*

This value is a five-digit number.

### 9.8.1.1.8 Total

#### *9.8.1.1.8.1 Origin of Data Element*

This value is the count of participants in the total infant, children and women totals for the race/ethnicity.

#### *9.8.1.1.8.2 Format*

This value is a five-digit number.

### **9.8.1.2 Filter Criteria**

#### **9.8.1.2.1 Base of Data**

All WIC enrollees eligible to receive benefits are included in the report totals. Enrollees must meet the following selection criteria.

- Enrolled\_This\_Month attribute of the Caseload\_Count\_Enrollment entity equals 'Y'
- Participation\_Month attribute of the Caseload\_Count\_Enrollment entity equals the reported month
- Program\_Code attribute of the Caseload\_Count\_Enrollment entity equals the WIC value

#### **9.8.1.2.2 Agency, State, All**

If an individual agency is selected, summary data for that agency will be included. If all agencies are selected, summary data for all agencies will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all agencies and state will be selected in the following sequence.

- Agency 01 summary
- Agency 02 summary
- State summary

### **9.8.1.3 Sort Order**

#### **9.8.1.3.1 Agency / State Total**

This report will be sorted by agency code and state totals, depending on selection criteria of the report.

- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by agency code.

#### **9.8.1.3.2 Race/Ethnicity Code**

The report will be sorted by race/ethnicity code within local agency/state.

### **9.8.1.4 Control Breaks**

#### **9.8.1.4.1 Agency**

On a change of local agency identifier a page break will occur.

### *9.8.1.5 Grand Total*

The total number of enrollees by age and race/ethnicity for all local agencies will be printed as state totals when the state or all option is selected.

### *9.8.1.6 Frequency and Distribution*

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

## **9.9 Management Information Summary Reports**

The Management Information Summary reports accumulate totals for the federal fiscal year beginning in October and ending in September. Year-to-date totals are re-started in October. The following are the Management Information Summary reports.

- Enrollment Monthly
- Enrollment Unduplicated-Yearly
- Reported Participation Monthly
- Reported Participation Unduplicated-Yearly
- Monthly Redemption Unduplicated
- Redeemed Participation Unduplicated-Yearly
- Redeemed Participation Priority Summary
- Redeemed Participation High-Risk Priority Goal
- Reported Participation High-Risk Outreach
- Estimated Eligible Comparison - Reported Participation
- Participation Processing Statistics
- Redeemed Food Instruments/Expenditures
- Food Instrument Package Cost
- Caseload Management Projection System

The description of the Management Information Summary reports use selected words with specific definitions. The following definitions apply to the words.

- A monthly count is a count where a participant is included in the totals for each month that is applicable for his or her situation.
- An unduplicated count is a count where a participant is included in only one monthly total for the reported year that is applicable for his or her situation. Unduplicated means the participant is counted only once during the specified year type.
- Reported participation is the count of the number of participants that were issued food instruments in a given month.
- Redeemed participation is the count of the number of participants that redeemed food instruments that were issued in a given month.

If the category or priority for a participant changes during a reported month, the category and priority at the end of the reported month will be used for participation counts. Also, if the participant changes agency or clinic locations during the reported month, the agency and clinic location at the end of the reported month will be used for participation counts. The category, priority, agency and clinic values will come from the food instrument last issued/printed for the participant for that reported month. If the participant has not been issued a food instrument for the reported month, the values will come from the certification contact data.

The following priorities are valid for each category.

- Status P – priorities 1 and 4
- Status B – priorities 1, 2 and 4
- Status N – priorities 3 and 6
- Status I – priorities 1, 2 and 4
- Status C – priorities 3 and 5

The issue month will be indicated with ISSD under the month name. The 30-day status month will be indicated with 30DY under the month name. When closeout for a month has been reached, C/O will print under the month name. The report is cumulative to allow the count of participants to be followed monthly from the issue month until closeout. Once a month has reached closeout, the counts will not change for that month.

The Management Information Summary reports restart calculations with October as the issuance month. The months of August and September will continue to be updated in the database for the previous year until these months reach closeout status. The updated data is available on reports for the previous fiscal year that are available through the generate Dialogs. The month-end process will print reports for the current fiscal year only.

## 9.10 Generate Enrollment Monthly Report Dialog

When this report is selected, the system will display the Generate Enrollment Monthly Report Dialog to select criteria for printing the Enrollment Monthly Report.

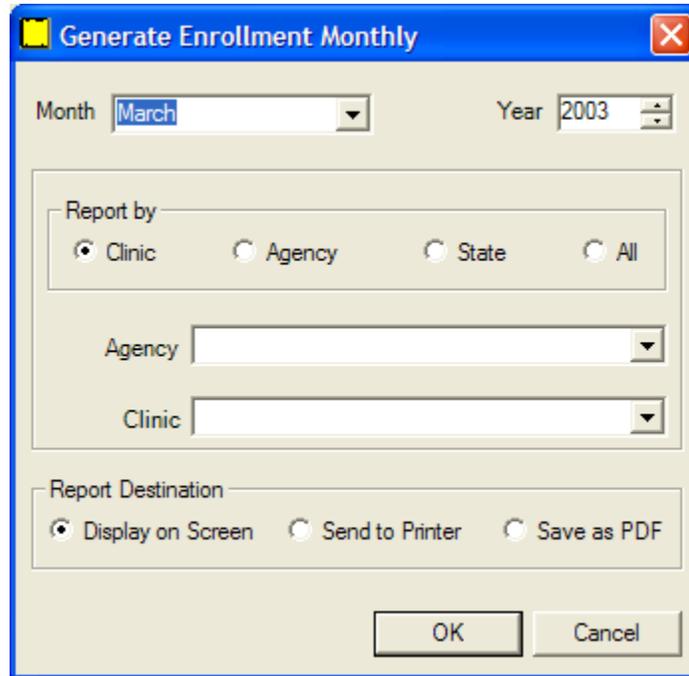


Figure 5 – Generate Enrollment Monthly Report Dialog

### 9.10.1 Controls

#### 9.10.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Enrollment Monthly Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.10.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Enrollment Monthly Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

#### ***9.10.1.3 Report By Radio Button***

This control allows the user to select a report break. Clinic break only, Agency break only, State grand total only or all three. The control will be enabled when the Generate Enrollment Monthly Report Dialog is enabled. It will default to Clinic.

#### ***9.10.1.4 Agency Dropdown List***

This control allows the user to select a specific agency. The control will be enabled when the Generate Enrollment Monthly Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

#### ***9.10.1.5 Clinic Dropdown List***

This control allows the user to select a specific clinic. The control will be enabled when the Generate Enrollment Monthly Report Dialog is enabled. It will be disabled if the Report By value of Agency or All or State is selected. It will be filled with all clinics in the clinic entity for the selected agency (by Agency and Clinic). It will default to blank.

#### ***9.10.1.6 Report Destination Radio Button***

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Enrollment Monthly Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

#### ***9.10.1.7 OK Button***

This control allows the user to print the report. The control will be enabled when the Generate Enrollment Monthly Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

#### ***9.10.1.8 Cancel Button***

This control allows the user to exit the Generate Enrollment Monthly Report Dialog. The control will be enabled when the Generate Enrollment Monthly Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### **9.10.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Enrollment Monthly Report Dialog.

### 9.10.2.1 *Initializing the Interface*

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Enrollment Monthly Report”
- The Month will default to the current month of the Process\_Control table.
- The Report by Clinic radio button is initially selected.
- The Display on Screen radio button is initially selected.

### 9.10.2.2 *Edits*

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Clinic or Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the Agency.”
- If the Clinic radio button is selected and no selection has been made in the Clinic dropdown, the system will display a standard error message with the text “A selection is required in the Clinic.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Enrollment Monthly Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Enrollment Monthly Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Enrollment Monthly Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Enrollment Monthly Report dialog and return the user to the Generate Reports dialog.

### **9.11 Enrollment Monthly (Output) CLD005**

The user may generate the Enrollment Monthly Report from the Generate Enrollment Monthly Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual clinics, agency summaries and the state summary will be printed.

The Enrollment Monthly is a month-by-month count of people who are eligible to receive WIC benefits. If an individual is in a valid certification period, he or she is eligible to receive WIC benefits and is included in the totals for each month that he or she is eligible.

Within each category, totals are accumulated for applicable priorities. If a participant has an unknown priority or a priority that is not valid for their category, the participant is included in the 'Unknown' priority count.

CLD005	<STATE NAME DEPARTMENT OF HEALTH> ENROLLMENT MONTHLY MONTH OF <MARCH 2003>											RUN DATE XX/XX/XXXX	
												RUN TIME XX:XX:XX	
												PAGE: XXX	
<CLINIC OR AGENCY OR STATE TOTAL>													
	OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	C/O
	C/O	C/O	C/O	C/O	30DY	ISSD							AVG
TOTAL ENROLLMENT	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 1	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 2	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 3	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 4	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 6	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
UNKNOWN	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
WOMEN - P	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 1	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 4	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
UNKNOWN	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
*** END OF LISTING ***													

### 9.11.1.1 Data Elements

#### 9.11.1.1.1 Month of

##### 9.11.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.11.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.11.1.1.2 Clinic / Agency / State Total

##### 9.11.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting clinic data, the agency code, clinic code and clinic description will be printed.
- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.11.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.11.1.1.3 Total Enrollment (Monthly Count)

##### 9.11.1.1.3.1 Origin of Data Element

This value is the total count of selected enrollees, grouped by reported month.

##### 9.11.1.1.3.2 Format

This value is a six-digit number.

#### 9.11.1.1.4 Category Total (Monthly Count)

##### 9.11.1.1.4.1 Origin of Data Element

This value is the total count of selected enrollees, grouped by the WICStatus attribute of the Caseload\_Count\_Enrollment entity for each reported month.

#### 9.11.1.1.4.2 *Format*

This value is a six-digit number.

#### 9.11.1.1.5 Priority Total (Monthly Count)

##### 9.11.1.1.5.1 *Origin of Data Element*

This value is the total count of selected enrollees, grouped by the WICStatus and Priority attributes of the Caseload\_Count\_Enrollment entity for each reported month. If a participant's priority value is unknown or is a value that is not valid for the WIC Category, the count is accumulated in the 'UNKNOWN' priority.

##### 9.11.1.1.5.2 *Format*

This value is a six-digit number.

#### 9.11.1.1.6 Percent (Monthly)

##### 9.11.1.1.6.1 *Origin of Data Element*

This value is calculated by dividing the applicable line total for the month by the total enrollment (monthly count) for the same month.

##### 9.11.1.1.6.2 *Format*

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

#### 9.11.1.1.7 C/O Avg

##### 9.11.1.1.7.1 *Origin of Data Element*

This value is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

##### 9.11.1.1.7.2 *Format*

This value is a six-digit number.

### 9.11.1.2 *Filter Criteria*

#### 9.11.1.2.1 Base of Data

All WIC enrollees eligible to receive benefits are included in the report totals. Enrollees must meet the following selection criteria.

- Enrolled\_This\_Month attribute of the Caseload\_Count\_Enrollment entity equals 'Y'

- Participation\_CYM attribute of the Caseload\_Count\_Enrollment entity equals the reported month
- Program\_Code attribute of the Caseload\_Count\_Enrollment entity equals the WIC value

#### 9.11.1.2.2 Clinic, Agency, State, All

If an individual clinic is selected, only data for that clinic will be included. If an individual agency is selected, summary data for that agency will be included. If all agencies are selected, summary data for all agencies will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all sites, agencies and state will be selected in the following sequence.

- Agency 01, clinic 01
- Agency 01, clinic 02
- Agency 01 summary
- Agency 02, clinic 21
- Agency 02, clinic 22
- Agency 02 summary
- State summary

#### 9.11.1.3 Sort Order

##### 9.11.1.3.1 Clinic / Agency / State Total

This report will be sorted by clinic code, agency code and state totals, depending on selection criteria of the report.

- If more than one clinic is selected, the report will be sorted by agency code then clinic code.
- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by agency code then clinic code.

##### 9.11.1.3.2 Category and Priority

This report will be sorted by category and priority within clinic/agency/state. Data will be reported in the following sequence.

- Total enrollment
- Woman total (category P, B and N)
- Women by priority
- Pregnant women total (category P)
- Pregnant women by priority
- Breastfeeding women total (category B)
- Breastfeeding women by priority
- Non-breastfeeding women total (category N)
- Non-breastfeeding women by priority

- Infant total (category I)
- Infants by priority
- Child total (category C)
- Children by priority

#### ***9.11.1.4 Control Breaks***

##### ***9.11.1.4.1 Clinic / Agency***

A page break will occur on change in clinic/agency.

#### ***9.11.1.5 Grand Total***

State totals will be printed when the state or all option is selected.

#### ***9.11.1.6 Frequency and Distribution***

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

## 9.12 Generate Enrollment Unduplicated-Yearly Report Dialog

When this report is selected, the system will display the Generate Enrollment Unduplicated-Yearly Report Dialog to select criteria for printing the Enrollment Unduplicated-Yearly Report.

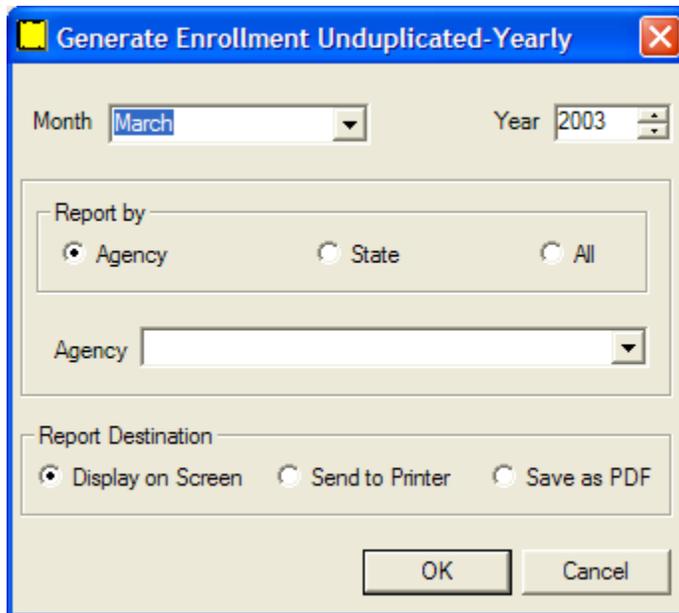


Figure 6 – Generate Enrollment Unduplicated-Yearly Report Dialog

### 9.12.1 Controls

#### 9.12.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Enrollment Unduplicated-Yearly Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.12.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Enrollment Unduplicated-Yearly Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.12.1.3 Report By Radio Button

This control allows the user to select a report break. The options are agency break only, state grand total only or all. The control will be enabled when the Generate Enrollment Unduplicated-Yearly Report Dialog is enabled. It will default to Agency.

### 9.12.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Enrollment Unduplicated-Yearly Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.12.1.5 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Enrollment Unduplicated-Yearly Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.12.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Enrollment Unduplicated-Yearly Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 9.12.1.7 Cancel Button

This control allows the user to exit the Generate Enrollment Unduplicated-Yearly Report Dialog. The control will be enabled when the Generate Enrollment Unduplicated-Yearly Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.12.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Enrollment Unduplicated-Yearly Report Dialog.

### 9.12.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Enrollment Unduplicated-Yearly Report”
- The Month will default to the current month of the Process\_Control table.
- The Report by Agency radio button is initially selected.

- The Display on Screen radio button is initially selected.

#### 9.12.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Enrollment Unduplicated-Yearly Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Enrollment Unduplicated-Yearly Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Enrollment Unduplicated-Yearly Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Enrollment Unduplicated-Yearly Report dialog and return the user to the Generate Reports dialog.

### **9.13 Enrollment Unduplicated-Yearly (Output) CLD006**

The user may generate the Enrollment Unduplicated-Yearly Report from the Generate Enrollment Unduplicated-Yearly Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual agency summaries and the state summary will be printed.

The Enrollment Unduplicated-Yearly is a month-by-month count of people who are eligible to receive WIC benefits throughout the reported year. If an individual is in a valid certification period, he or she is eligible to receive WIC benefits. If a participant is eligible to receive WIC benefits during the month of October, he or she is included in the count for October. All participants that become eligible and have not been included in a previous month's count are included in the count for the subsequent month that he or she becomes eligible. Unduplicated means the participant is counted only once during the specified year type.

CLD006		<STATE NAME DEPARTMENT OF HEALTH> ENROLLMENT UNDUPLICATED-YEARLY MONTH OF <MARCH 2003>							RUN DATE XX/XX/XXXX RUN TIME XX:XX:XX PAGE: XXX				
<AGENCY OR STATE TOTAL>													
	OCT 02 C/O	NOV 02 C/O	DEC 02 C/O	JAN 03 C/O	FEB 03 30DY	MAR 03 ISSD	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	CUM TOTAL
TOTAL UNDUPLICATED ENROLLMENT	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - P	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - B	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - N	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
INFANT - TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
CHILDREN - TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
*** END OF LISTING ***													

### 9.13.1.1 Data Elements

#### 9.13.1.1.1 Month of

##### 9.13.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.13.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.13.1.1.2 Agency / State Total

##### 9.13.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.13.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.13.1.1.3 Total Unduplicated Enrollment (Monthly Count)

##### 9.13.1.1.3.1 Origin of Data Element

This value is the total count of selected enrollees, grouped by reported month.

##### 9.13.1.1.3.2 Format

This value is a six-digit number.

#### 9.13.1.1.4 Category Total (Monthly Count)

##### 9.13.1.1.4.1 Origin of Data Element

This value is the total count of selected enrollees, grouped by the WICStatus attribute of the Caseload\_Count\_Undup\_Federal entity for each reported month.

##### 9.13.1.1.4.2 Format

This value is a six-digit number.

#### 9.13.1.1.5 Cum Total

##### *9.13.1.1.5.1 Origin of Data Element*

This value is the sum of the reported month attributes.

##### *9.13.1.1.5.2 Format*

This value is a six-digit number.

#### 9.13.1.2 Filter Criteria

##### 9.13.1.2.1 Base of Data

All WIC enrollees eligible to receive benefits during the reported year are included in the report totals. Enrollees must meet the following selection criteria. Each enrollee is counted once for the reported year.

- Enrollment\_Part\_CYM attribute of the Caseload\_Count\_Undup\_Federal entity equals the reported month

##### 9.13.1.2.2 Agency, State, All

If an individual agency is selected, summary data for that agency will be included. If all agencies are selected, summary data for all agencies will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all agencies and state will be selected in the following sequence.

- Agency 01 summary
- Agency 02 summary
- State summary

#### 9.13.1.3 Sort Order

##### 9.13.1.3.1 Agency / State Total

This report will be sorted by agency code and state totals, depending on selection criteria of the report.

- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by agency code.

##### 9.13.1.3.2 Category

This report will be sorted by category within agency/state. Data will be reported in the following sequence.

- Total enrollment
- Woman total (category P, B and N)
- Pregnant women total (category P)

- Breastfeeding women total (category B)
- Non-breastfeeding women total (category N)
- Infant total (category I)
- Child total (category C)

#### ***9.13.1.4 Control Breaks***

##### ***9.13.1.4.1 Agency***

A page break will occur on change in agency.

#### ***9.13.1.5 Grand Total***

State totals will be printed when the state or all option is selected.

#### ***9.13.1.6 Frequency and Distribution***

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

## 9.14 Generate Reported Participation Monthly Report Dialog

When this report is selected, the system will display the Generate Reported Participation Monthly Report Dialog to select criteria for printing the Reported Participation Monthly Report.

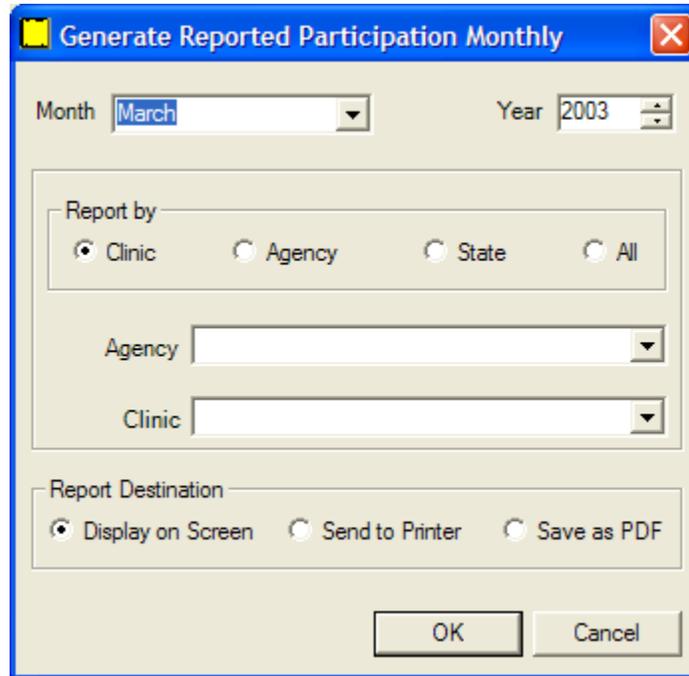


Figure 7 – Generate Reported Participation Monthly Report Dialog

### 9.14.1 Controls

#### 9.14.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Reported Participation Monthly Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.14.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Reported Participation Monthly Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

#### 9.14.1.3 Report By Radio Button

This control allows the user to select a report break. Clinic break only, Agency break only, State grand total only or all three. The control will be enabled when the Generate Reported Participation Monthly Report Dialog is enabled. It will default to Clinic.

#### 9.14.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Reported Participation Monthly Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

#### 9.14.1.5 Clinic Dropdown List

This control allows the user to select a specific clinic. The control will be enabled when the Generate Reported Participation Monthly Report Dialog is enabled. It will be disabled if the Report By value of Agency or All or State is selected. It will be filled with all clinics in the clinic entity for the selected agency (by Agency and Clinic). It will default to blank.

#### 9.14.1.6 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Reported Participation Monthly Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

#### 9.14.1.7 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Reported Participation Monthly Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

#### 9.14.1.8 Cancel Button

This control allows the user to exit the Generate Reported Participation Monthly Report Dialog. The control will be enabled when the Generate Reported Participation Monthly Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 9.14.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Reported Participation Monthly Report Dialog.

### 9.14.2.1 *Initializing the Interface*

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Reported Participation Monthly Report”
- The Month will default to the current month of the Process\_Control table.
- The Report by Clinic radio button is initially selected.
- The Display on Screen radio button is initially selected.

### 9.14.2.2 *Edits*

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Clinic or Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the Agency.”
- If the Clinic radio button is selected and no selection has been made in the Clinic dropdown, the system will display a standard error message with the text “A selection is required in the Clinic.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Reported Participation Monthly Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Reported Participation Monthly Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Reported Participation Monthly Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Reported Participation Monthly Report dialog and return the user to the Generate Reports dialog.

### ***9.15 Reported Participation Monthly (Output) CLD007***

The user may generate the Reported Participation Monthly Report from the Generate Reported Participation Monthly Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual clinics, agency summaries and the state summary will be printed.

The Reported Participation Monthly is a month-by-month count of participants who were issued at least one food instrument. Participants are counted in each month that they are issued a food instrument. Issuance is based on the participation date value, not the date the food instrument is printed.

Within each category, totals are accumulated for applicable priorities. If a participant has an unknown priority or a priority that is not valid for their category, the participant is included in the 'Unknown' priority count.

CLD007	<STATE NAME DEPARTMENT OF HEALTH> REPORTED PARTICIPATION MONTHLY MONTH OF <MARCH 2003>											RUN DATE XX/XX/XXXX	
												RUN TIME XX:XX:XX	
												PAGE: XXX	
<CLINIC OR AGENCY OR STATE TOTAL>													
	OCT 02 C/O	NOV 02 C/O	DEC 02 C/O	JAN 03 C/O	FEB 03 30DY	MAR 03 ISSD	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	C/O AVG
TOTAL RPTD PARTIC	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 1	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 2	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 3	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 4	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 6	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
UNKNOWN	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
WOMEN - P	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 1	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 4	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
UNKNOWN	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
*** END OF LISTING ***													

### 9.15.1.1 Data Elements

#### 9.15.1.1.1 Month of

##### 9.15.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.15.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.15.1.1.2 Clinic / Agency / State Total

##### 9.15.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting clinic data, the agency code, clinic code and clinic description will be printed.
- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.15.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.15.1.1.3 Total Reported Participation (Monthly Count)

##### 9.15.1.1.3.1 Origin of Data Element

This value is the total count of selected participants, grouped by reported month.

##### 9.15.1.1.3.2 Format

This value is a six-digit number.

#### 9.15.1.1.4 Category Total (Monthly Count)

##### 9.15.1.1.4.1 Origin of Data Element

This value is the total count of selected participants, grouped by the WICStatus attribute of the CaseloadCount entity for each reported month.

#### 9.15.1.1.4.2 Format

This value is a six-digit number.

#### 9.15.1.1.5 Priority Total (Monthly Count)

##### 9.15.1.1.5.1 Origin of Data Element

This value is the total count of selected participants, grouped by the WICStatus and Priority attributes of the CaseloadCount entity for each reported month. If a participant's priority value is unknown or is a value that is not valid for the WIC Category, the count is accumulated in the 'UNKNOWN' priority.

##### 9.15.1.1.5.2 Format

This value is a six-digit number.

#### 9.15.1.1.6 Percent (Monthly)

##### 9.15.1.1.6.1 Origin of Data Element

This value is calculated by dividing the applicable line total for the month by the total reported participation (monthly count) for the same month.

##### 9.15.1.1.6.2 Format

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

#### 9.15.1.1.7 C/O Avg

##### 9.15.1.1.7.1 Origin of Data Element

This value is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

##### 9.15.1.1.7.2 Format

This value is a six-digit number.

#### 9.15.1.2 Filter Criteria

##### 9.15.1.2.1 Base of Data

All WIC participants that received benefits are included in the report totals. Participants must meet the following selection criteria.

- Rpted\_This\_Month attribute of the CaseloadCount entity equals 'Y'
- Participation\_CYM attribute of the CaseloadCount entity equals the reported month

- Program\_Code attribute of the CaseloadCount entity equals the WIC value

#### 9.15.1.2.2 Clinic, Agency, State, All

If an individual clinic is selected, only data for that clinic will be included. If an individual agency is selected, summary data for that agency will be included. If all agencies are selected, summary data for all agencies will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all sites, agencies and state will be selected in the following sequence.

- Agency 01, clinic 01
- Agency 01, clinic 02
- Agency 01 summary
- Agency 02, clinic 21
- Agency 02, clinic 22
- Agency 02 summary
- State summary

#### 9.15.1.3 Sort Order

##### 9.15.1.3.1 Clinic / Agency / State Total

This report will be sorted by clinic code, agency code and state totals, depending on selection criteria of the report.

- If more than one clinic is selected, the report will be sorted by agency code then clinic code.
- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by agency code then clinic code.

##### 9.15.1.3.2 Category and Priority

This report will be sorted by category and priority within clinic/agency/state. Data will be reported in the following sequence.

- Total participation
- Woman total (category P, B and N)
- Women by priority
- Pregnant women total (category P)
- Pregnant women by priority
- Breastfeeding women total (category B)
- Breastfeeding women by priority
- Non-breastfeeding women total (category N)
- Non-breastfeeding women by priority
- Infant total (category I)
- Infants by priority

- Child total (category C)
- Children by priority

#### ***9.15.1.4 Control Breaks***

##### **9.15.1.4.1 Clinic / Agency**

A page break will occur on change in clinic/agency.

#### ***9.15.1.5 Grand Total***

State totals will be printed when the state or all option is selected.

#### ***9.15.1.6 Frequency and Distribution***

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

## 9.16 Generate Reported Participation Unduplicated-Yearly Report Dialog

When this report is selected, the system will display the Generate Reported Participation Unduplicated-Yearly Report Dialog to select criteria for printing the Reported Participation Unduplicated-Yearly Report.

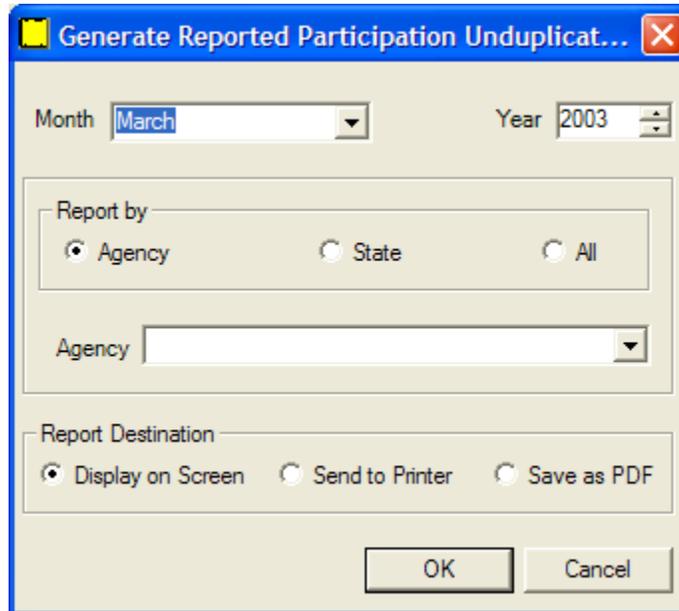


Figure 8 – Generate Reported Participation Unduplicated-Yearly Report Dialog

### 9.16.1 Controls

#### 9.16.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Reported Participation Unduplicated-Yearly Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.16.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Reported Participation Unduplicated-Yearly Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.16.1.3 Report By Radio Button

This control allows the user to select a report break. The options are agency break only, state grand total only or all. The control will be enabled and will default to Display on Screen when the Generate Reported Participation Unduplicated-Yearly Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.16.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Reported Participation Unduplicated-Yearly Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.16.1.5 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the Generate Reported Participation Unduplicated-Yearly Report Dialog is enabled. It will default to Display on Screen.

### 9.16.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Reported Participation Unduplicated-Yearly Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 9.16.1.7 Cancel Button

This control allows the user to exit the Generate Reported Participation Unduplicated-Yearly Report Dialog. The control will be enabled when the Generate Reported Participation Unduplicated-Yearly Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.16.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Reported Participation Unduplicated-Yearly Report Dialog.

### 9.16.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Reported Participation Unduplicated-Yearly Report”
- The Month will default to the current month of the Process\_Control table.

- The Report by Agency radio button is initially selected.
- The Display on Screen radio button is initially selected.

#### 9.16.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Reported Participation Unduplicated-Yearly Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Reported Participation Unduplicated-Yearly Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Reported Participation Unduplicated-Yearly Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Reported Participation Unduplicated-Yearly Report dialog and return the user to the Generate Reports dialog.

### **9.17 Reported Participation Unduplicated-Yearly (Output) CLD008**

The user may generate the Reported Participation Unduplicated-Yearly Report from the Generate Reported Participation Unduplicated-Yearly Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual agency summaries and the state summary will be printed.

The Reported Participation Unduplicated-Yearly is a month-by-month count of participants who received WIC benefits throughout the reported year. If a participant was issued a food instrument during the month of October, he or she is included in the count for October. All participants that were issued food instruments and had not been included in a previous month's count are included in the count for subsequent months for the month that he or she was first issued a food instrument. Unduplicated means the participant is counted only once during the specified year type.

CLD008	<STATE NAME DEPARTMENT OF HEALTH> REPORTED PARTICIPATION UNDUPLICATED-YEARLY MONTH OF <MARCH 2003>											RUN DATE	XX/XX/XXXX
												RUN TIME	XX:XX:XX
												PAGE:	XXX
<AGENCY OR STATE TOTAL>													
	OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	CUM
	C/O	C/O	C/O	C/O	30DY	ISSD							TOTAL
TOTAL UNDUPLICATED													
RPTD PARTIC	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - P	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - B	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - N	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
INFANT - TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
CHILDREN - TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
*** END OF LISTING ***													

### 9.17.1.1 Data Elements

#### 9.17.1.1.1 Month of

##### 9.17.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.17.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.17.1.1.2 Agency / State Total

##### 9.17.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.17.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.17.1.1.3 Total Unduplicated Reported Participation (Monthly Count)

##### 9.17.1.1.3.1 Origin of Data Element

This value is the total count of selected enrollees, grouped by reported month.

##### 9.17.1.1.3.2 Format

This value is a six-digit number.

#### 9.17.1.1.4 Category Total (Monthly Count)

##### 9.17.1.1.4.1 Origin of Data Element

This value is the total count of selected participants, grouped by the WICStatus attribute of the Caseload\_Count\_Undup\_Federal entity for each reported month.

##### 9.17.1.1.4.2 Format

This value is a six-digit number.

#### 9.17.1.1.5 Cum Total

##### *9.17.1.1.5.1 Origin of Data Element*

This value is the sum of the reported month attributes.

##### *9.17.1.1.5.2 Format*

This value is a six-digit number.

#### 9.17.1.2 Filter Criteria

##### 9.17.1.2.1 Base of Data

All WIC participants that received benefits during the reported year are included in the report totals. Participants must meet the following selection criteria. Each participant is counted once for the reported year.

- Reported\_Part\_CYM attribute of the Caseload\_Count\_Undup\_Federal entity equals the reported month

##### 9.17.1.2.2 Agency, State, All

If an individual agency is selected, summary data for that agency will be included. If all agencies are selected, summary data for all agencies will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all agencies and state will be selected in the following sequence.

- Agency 01 summary
- Agency 02 summary
- State summary

#### 9.17.1.3 Sort Order

##### 9.17.1.3.1 Agency / State Total

This report will be sorted by agency code and state totals, depending on selection criteria of the report.

- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by agency code.

##### 9.17.1.3.2 Category

This report will be sorted by category within agency/state. Data will be reported in the following sequence.

- Total reported participation
- Woman total (category P, B and N)

- Pregnant women total (category P)
- Breastfeeding women total (category B)
- Non-breastfeeding women total (category N)
- Infant total (category I)
- Child total (category C)

#### ***9.17.1.4 Control Breaks***

##### ***9.17.1.4.1 Agency***

A page break will occur on change in agency.

#### ***9.17.1.5 Grand Total***

State totals will be printed when the state or all option is selected.

#### ***9.17.1.6 Frequency and Distribution***

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

## 9.18 Generate Monthly Redemption Unduplicated Report Dialog

When this report is selected, the system will display the Generate Monthly Redemption Unduplicated Report Dialog to select criteria for printing the Monthly Redemption Unduplicated Report.

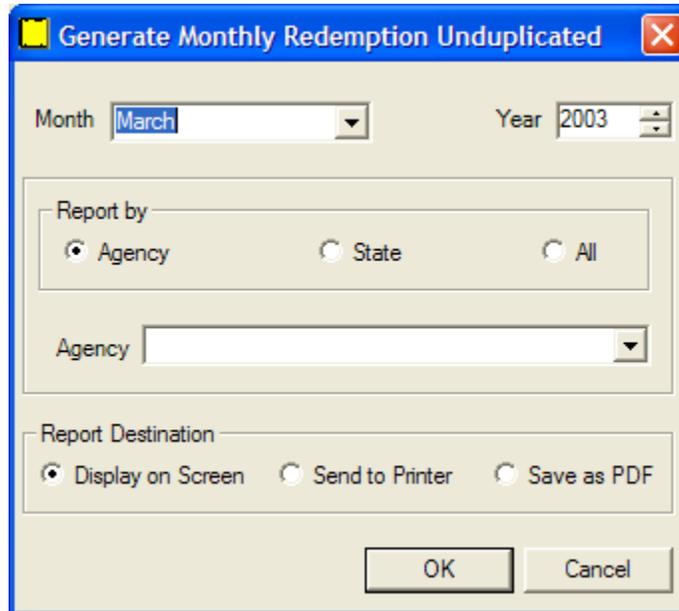


Figure 9 – Generate Monthly Redemption Unduplicated Report Dialog

### 9.18.1 Controls

#### 9.18.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Monthly Redemption Unduplicated Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.18.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Monthly Redemption Unduplicated Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.18.1.3 Report By Radio Button

This control allows the user to select a report break. The options are agency break only, state grand total only or all. The control will be enabled and will default to Display on Screen when the Generate Monthly Redemption Unduplicated Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.18.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Monthly Redemption Unduplicated Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.18.1.5 Report Destination Radio Button

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

### 9.18.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Monthly Redemption Unduplicated Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 9.18.1.7 Cancel Button

This control allows the user to exit the Generate Monthly Redemption Unduplicated Report Dialog. The control will be enabled when the Generate Monthly Redemption Unduplicated Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.18.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Monthly Redemption Unduplicated Report Dialog.

### 9.18.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Monthly Redemption Unduplicated Report”
- The Month will default to the current month of the Process\_Control table.
- The Report by Agency radio button is initially selected.

- The Display on Screen radio button is initially selected.

#### 9.18.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Monthly Redemption Unduplicated Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Monthly Redemption Unduplicated Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Monthly Redemption Unduplicated Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Monthly Redemption Unduplicated Report dialog and return the user to the Generate Reports dialog.

### ***9.19 Monthly Redemption Unduplicated (Output) CLD009***

The user may generate the Monthly Redemption Unduplicated Report from the Generate Monthly Redemption Unduplicated Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual agency summaries and the state summary will be printed.

The Monthly Redemption Unduplicated is a month-by-month count of participants who redeemed at least one food instrument that was issued in the reported month. Participants are counted in each month that he or she redeemed a food instrument that was issued in the reported month. Issuance is based on the participation date value, not the date the food instrument is printed. A redeemed food instrument is a food instrument presented for payment. Participants are included in the count even if the bank rejected all redeemed food instruments.

Within each category, totals are accumulated for applicable priorities. If a participant has an unknown priority or a priority that is not valid for their category, the participant is included in the 'Unknown' priority count.

CLD009	<STATE NAME DEPARTMENT OF HEALTH> MONTHLY REDEMPTION UNDUPLICATED MONTH OF <MARCH 2003>											RUN DATE	XX/XX/XXXX		
														RUN TIME	XX:XX:XX
														PAGE:	XXX
<COUNTY OR AGENCY OR STATE TOTAL>															
	OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	C/O		
	C/O	C/O	C/O	C/O	30DY	ISSD							AVG		
TOTAL RDMD PARTIC	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX	
WOMEN - TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX	
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X									
PRIORITY 1	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX	
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X									
PRIORITY 2	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX	
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X									
PRIORITY 3	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX	
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X									
PRIORITY 4	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX	
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X									
PRIORITY 6	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX	
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X									
UNKNOWN	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX	
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X									
WOMEN - P	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX	
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X									
PRIORITY 1	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX	
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X									
PRIORITY 4	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX	
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X									
UNKNOWN	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX	
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X									
*** END OF LISTING ***															

### 9.19.1.1 Data Elements

#### 9.19.1.1.1 Month of

##### 9.19.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.19.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.19.1.1.2 County / Agency / State Total

##### 9.19.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting county data, the county code and description will be printed.
- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.19.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.19.1.1.3 Total Redeemed Participation (Monthly Count)

##### 9.19.1.1.3.1 Origin of Data Element

This value is the total count of selected participants, grouped by reported month.

##### 9.19.1.1.3.2 Format

This value is a six-digit number.

#### 9.19.1.1.4 Category Total (Monthly Count)

##### 9.19.1.1.4.1 Origin of Data Element

This value is the total count of selected participants, grouped by the WICStatus attribute of the CaseloadCount entity for each reported month.

#### 9.19.1.1.4.2 *Format*

This value is a six-digit number.

#### 9.19.1.1.5 Priority Total (Monthly Count)

##### 9.19.1.1.5.1 *Origin of Data Element*

This value is the total count of selected participants, grouped by the WICStatus and Priority attributes of the CaseloadCount entity for each reported month. If a participant's priority value is unknown or is a value that is not valid for the WIC Category, the count is accumulated in the 'UNKNOWN' priority.

##### 9.19.1.1.5.2 *Format*

This value is a six-digit number.

#### 9.19.1.1.6 Percent (Monthly)

##### 9.19.1.1.6.1 *Origin of Data Element*

This value is calculated by dividing the applicable line total for the month by the total redeemed participation (monthly count) for the same month.

##### 9.19.1.1.6.2 *Format*

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

#### 9.19.1.1.7 C/O Avg

##### 9.19.1.1.7.1 *Origin of Data Element*

This value is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

##### 9.19.1.1.7.2 *Format*

This value is a six-digit number.

#### 9.19.1.2 *Filter Criteria*

##### 9.19.1.2.1 Base of Data

All WIC participants that received benefits and redeemed at least one food instrument are included in the report totals. Participants must meet the following selection criteria.

- Rdmnd\_This\_Month attribute of the CaseloadCount entity equals 'Y'

- Participation\_CYM attribute of the CaseloadCount entity equals the reported month
- Program\_Code attribute of the CaseloadCount entity equals the WIC value

#### 9.19.1.2.2 Agency, State, All

If an individual agency is selected, summary data for each county within the agency and summary data for that agency will be included. If all agencies are selected, summary data for all agencies and summary data for each county within the agency will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all agencies and state will be selected in the following sequence.

- County 01 summary
- County 02 summary
- Agency 01 summary
- County 03 summary
- County 04 summary
- Agency 02 summary
- State summary

#### 9.19.1.3 Sort Order

##### 9.19.1.3.1 Agency / State Total

This report will be sorted by agency code and county code and state totals, depending on selection criteria of the report.

- County will be sorted within agency code.
- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by agency code.

##### 9.19.1.3.2 Category and Priority

This report will be sorted by category and priority within agency/state. Data will be reported in the following sequence.

- Total participation
- Woman total (category P, B and N)
- Women by priority
- Pregnant women total (category P)
- Pregnant women by priority
- Breastfeeding women total (category B)
- Breastfeeding women by priority
- Non-breastfeeding women total (category N)
- Non-breastfeeding women by priority
- Infant total (category I)

- Infants by priority
- Child total (category C)
- Children by priority

#### ***9.19.1.4 Control Breaks***

##### ***9.19.1.4.1 Agency***

A page break will occur on change in agency.

#### ***9.19.1.5 Grand Total***

State totals will be printed when the state or all option is selected.

#### ***9.19.1.6 Frequency and Distribution***

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

## 9.20 Generate Redeemed Participation Unduplicated-Yearly Report Dialog

When this report is selected, the system will display the Generate Redeemed Participation Unduplicated-Yearly Report Dialog to select criteria for printing the Redeemed Participation Unduplicated-Yearly Report.

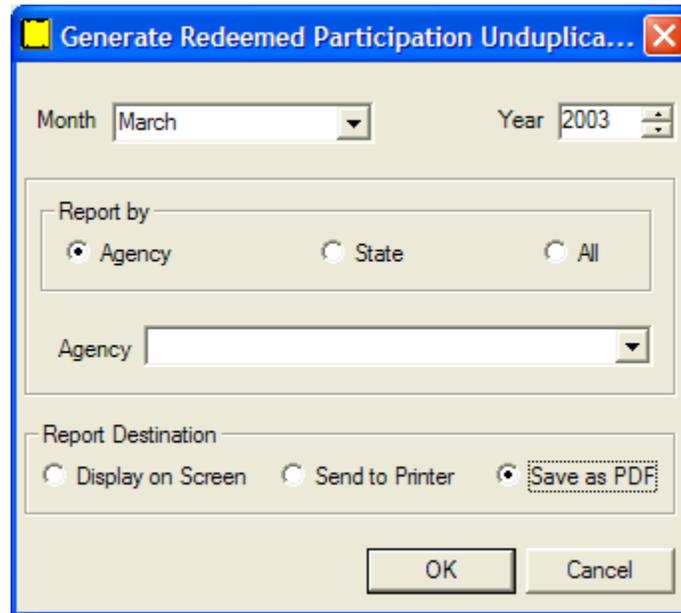


Figure 10 – Generate Redeemed Participation Unduplicated-Yearly Report Dialog

### 9.20.1 Controls

#### 9.20.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Redeemed Participation Unduplicated-Yearly Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.20.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Redeemed Participation Unduplicated-Yearly Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.20.1.3 Report By Radio Button

This control allows the user to select a report break. The options are agency break only, state grand total only or all. The control will be enabled when the Generate Redeemed Participation Unduplicated-Yearly Report Dialog is enabled. It will default to Agency.

### 9.20.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Redeemed Participation Unduplicated-Yearly Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.20.1.5 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Redeemed Participation Unduplicated-Yearly Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.20.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Redeemed Participation Unduplicated-Yearly Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 9.20.1.7 Cancel Button

This control allows the user to exit the Generate Redeemed Participation Unduplicated-Yearly Report Dialog. The control will be enabled when the Generate Redeemed Participation Unduplicated-Yearly Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.20.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Redeemed Participation Unduplicated-Yearly Report Dialog.

### 9.20.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Redeemed Participation Unduplicated-Yearly Report”
- The Month will default to the current month of the Process\_Control table.
- The Report by Agency radio button is initially selected.

- The Display on Screen radio button is initially selected.

#### 9.20.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Redeemed Participation Unduplicated-Yearly Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Redeemed Participation Unduplicated-Yearly Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Redeemed Participation Unduplicated-Yearly Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Redeemed Participation Unduplicated-Yearly Report dialog and return the user to the Generate Reports dialog.

### ***9.21 Redeemed Participation Unduplicated-Yearly (Output) CLD010***

The user may generate the Redeemed Participation Unduplicated-Yearly Report from the Generate Redeemed Participation Unduplicated-Yearly Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual agency summaries and the state summary will be printed.

The Redeemed Participation Unduplicated-Yearly is a month-by-month count of participants who received WIC benefits and redeemed at least one food instrument throughout the reported year. If a participant was issued a food instrument during the month of October and redeemed that food instrument, he or she is included in the count for October. All participants that had not been included in a previous month's count are included in the count for subsequent months for the month that he or she was first issued a food instrument and redeemed the food instrument. Unduplicated means the participant is counted only once during the specified year type.

A redeemed food instrument is a food instrument presented for payment. Participants are included in the count even if the bank rejected all redeemed food instruments.

CLD010	<STATE NAME DEPARTMENT OF HEALTH> REDEEMED PARTICIPATION UNDUPLICATED-YEARLY MONTH OF <MARCH 2003>							RUN DATE	XX/XX/XXXX				
								RUN TIME	XX:XX:XX				
								PAGE:	XXX				
<COUNTY OR AGENCY OR STATE TOTAL>													
	OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	CUM
	C/O	C/O	C/O	C/O	30DY	ISSD							TOTAL
TOTAL UNDUPLICATED													
RDMD PARTIC	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - P	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - B	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
WOMEN - N	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
INFANT - TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
CHILDREN - TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
*** END OF LISTING ***													

### 9.21.1.1 Data Elements

#### 9.21.1.1.1 Month of

##### 9.21.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.21.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.21.1.1.2 County / Agency / State Total

##### 9.21.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting county data, the county code and description will be printed.
- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.21.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.21.1.1.3 Total Unduplicated Redeemed Participation (Monthly Count)

##### 9.21.1.1.3.1 Origin of Data Element

This value is the total count of selected participants, grouped by reported month.

##### 9.21.1.1.3.2 Format

This value is a six-digit number.

#### 9.21.1.1.4 Category Total (Monthly Count)

##### 9.21.1.1.4.1 Origin of Data Element

This value is the total count of selected participants, grouped by the WICStatus attribute of the Caseload\_Count\_Undup\_Federal entity for each reported month.

#### 9.21.1.1.4.2 Format

This value is a six-digit number.

#### 9.21.1.1.5 Cum Total

##### 9.21.1.1.5.1 Origin of Data Element

This value is the sum of the reported month attributes.

##### 9.21.1.1.5.2 Format

This value is a six-digit number.

#### 9.21.1.2 Filter Criteria

##### 9.21.1.2.1 Base of Data

All WIC participants that received benefits during the reported year and redeemed at least one food instrument are included in the report totals. Participants must meet the following selection criteria. Each participant is counted once for the reported year.

- Redeemed\_Part\_CYM attribute of the Caseload\_Count\_Undup\_Federal entity equals the reported month

##### 9.21.1.2.2 Agency, State, All

If an individual agency is selected, summary data for each county within the agency and summary data for that agency will be included. If all agencies are selected, summary data for all agencies and summary data for each county within the agency will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all agencies and state will be selected in the following sequence.

- County 01 summary
- County 02 summary
- Agency 01 summary
- County 03 summary
- County 04 summary
- Agency 02 summary
- State summary

#### 9.21.1.3 Sort Order

##### 9.21.1.3.1 Agency / State Total

This report will be sorted by agency code and county code and state totals, depending on selection criteria of the report.

- County will be sorted within agency code.

- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by agency code.

#### 9.21.1.3.2 Category

This report will be sorted by category within agency/state. Data will be reported in the following sequence.

- Total redeemed participation
- Woman total (category P, B and N)
- Pregnant women total (category P)
- Breastfeeding women total (category B)
- Non-breastfeeding women total (category N)
- Infant total (category I)
- Child total (category C)

#### 9.21.1.4 Control Breaks

##### 9.21.1.4.1 Agency

A page break will occur on change in agency.

#### 9.21.1.5 Grand Total

State totals will be printed when the state or all option is selected.

#### 9.21.1.6 Frequency and Distribution

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

## 9.22 Generate Redeemed Participation Priority Summary Report Dialog

When this report is selected, the system will display the Generate Redeemed Participation Priority Summary Report Dialog to select criteria for printing the Redeemed Participation Priority Summary Report.

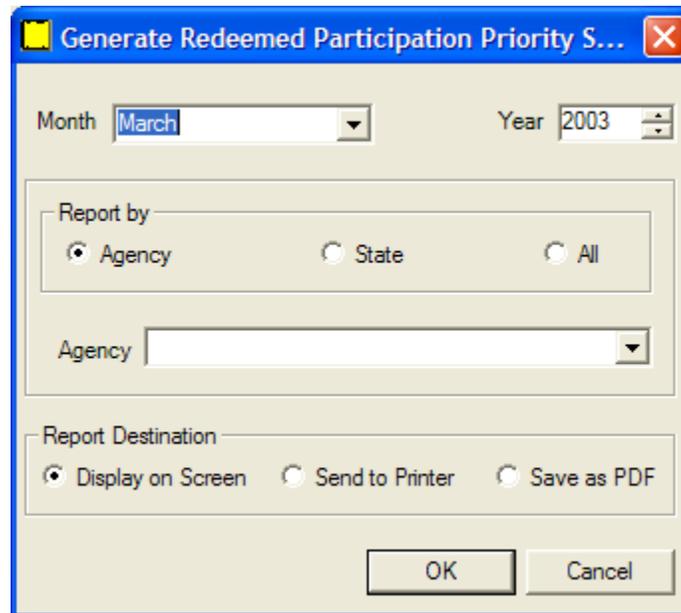


Figure 11 – Generate Redeemed Participation Priority Summary Report Dialog

### 9.22.1 Controls

#### 9.22.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Redeemed Participation Priority Summary Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.22.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Redeemed Participation Priority Summary Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.22.1.3 Report By Radio Button

This control allows the user to select a report break. The options are agency break only, state grand total only or all. The control will be enabled when the Generate Redeemed Participation Priority Summary Report Dialog is enabled. It will default to Agency.

### 9.22.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Redeemed Participation Priority Summary Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.22.1.5 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Redeemed Participation Priority Summary Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.22.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Redeemed Participation Priority Summary Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 9.22.1.7 Cancel Button

This control allows the user to exit the Generate Redeemed Participation Priority Summary Report Dialog. The control will be enabled when the Generate Redeemed Participation Priority Summary Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.22.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Redeemed Participation Priority Summary Report Dialog.

### 9.22.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Redeemed Participation Priority Summary Report”
- The Month will default to the current month of the Process\_Control table.
- The Report by Agency radio button is initially selected.

- The Display on Screen radio button is initially selected.

#### 9.22.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Redeemed Participation Priority Summary Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Redeemed Participation Priority Summary Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Redeemed Participation Priority Summary Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Redeemed Participation Priority Summary Report dialog and return the user to the Generate Reports dialog.

### **9.23 Redeemed Participation Priority Summary (Output) CLD011**

The user may generate the Redeemed Participation Priority Summary Report from the Generate Redeemed Participation Priority Summary Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual agency summaries and the state summary will be printed.

The Redeemed Participation Priority Summary is a month-by-month count of participants by priority who redeemed at least one food instrument that was issued in the reported month. Participants are counted in each month that he or she redeemed a food instrument that was issued in the reported month. Issuance is based on the participation date value, not the date the food instrument is printed. A redeemed food instrument is a food instrument presented for payment. Participants are included in the count even if the bank rejected all redeemed food instruments.

If a participant has an unknown priority or a priority that is not valid for their category, the participant is included in the 'Unknown' priority count.

CLD011		<STATE NAME DEPARTMENT OF HEALTH> REDEEMED PARTICIPATION PRIORITY SUMMARY MONTH OF <MARCH 2003>							RUN DATE XX/XX/XXXX				
									RUN TIME XX:XX:XX				
									PAGE: XXX				
<COUNTY OR AGENCY OR STATE TOTAL>													
	OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	C/O
	C/O	C/O	C/O	C/O	30DY	ISSD							AVG
PRIORITY SUMMARY	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PRIORITY 1	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 2	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 3	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
-----													
SUB-TOTAL 1, 2, 3	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 4	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 5	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
PRIORITY 6	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
UNKNOWN	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							
*** END OF LISTING ***													

### 9.23.1.1 Data Elements

#### 9.23.1.1.1 Month of

##### 9.23.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.23.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.23.1.1.2 County / Agency / State Total

##### 9.23.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting county data, the county code and description will be printed.
- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.23.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.23.1.1.3 Total Priority Summary (Monthly Count)

##### 9.23.1.1.3.1 Origin of Data Element

This value is the total count of selected participants, grouped by reported month.

##### 9.23.1.1.3.2 Format

This value is a six-digit number.

#### 9.23.1.1.4 Priority Total (Monthly Count)

##### *9.23.1.1.4.1 Origin of Data Element*

This value is the total count of selected participants, grouped by the Priority attribute of the CaseloadCount entity for each reported month. If a participant's priority value is unknown or is a value that is not valid for the WIC Category, the count is accumulated in the 'UNKNOWN' priority.

##### *9.23.1.1.4.2 Format*

This value is a six-digit number.

#### 9.23.1.1.5 Percent (Monthly)

##### *9.23.1.1.5.1 Origin of Data Element*

This value is calculated by dividing the applicable line total for the month by the total redeemed participation (monthly count) for the same month.

##### *9.23.1.1.5.2 Format*

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

#### 9.23.1.1.6 C/O Avg

##### *9.23.1.1.6.1 Origin of Data Element*

This value is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

##### *9.23.1.1.6.2 Format*

This value is a six-digit number.

#### 9.23.1.2 Filter Criteria

##### 9.23.1.2.1 Base of Data

All WIC participants that received benefits and redeemed at least one food instrument are included in the report totals. Participants must meet the following selection criteria.

- Rdmd\_This\_Month attribute of the CaseloadCount entity equals 'Y'
- Participation\_CYM attribute of the CaseloadCount entity equals the reported month
- Program\_Code attribute of the CaseloadCount entity equals the WIC value

#### 9.23.1.2.2 Agency, State, All

If an individual agency is selected, summary data for each county within the agency and summary data for that agency will be included. If all agencies are selected, summary data for all agencies and summary data for each county within the agency will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all agencies and state will be selected in the following sequence.

- County 01 summary
- County 02 summary
- Agency 01 summary
- County 03 summary
- County 04 summary
- Agency 02 summary
- State summary

#### 9.23.1.3 Sort Order

##### 9.23.1.3.1 Agency / State Total

This report will be sorted by agency code and county code and state totals, depending on selection criteria of the report.

- County will be sorted within agency code.
- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by agency code.

##### 9.23.1.3.2 Priority

This report will be sorted by priority within agency/state. Data will be reported in the following sequence.

- Total redeemed participation
- Priority 1
- Priority 2
- Priority 3
- Sub-total of priorities 1, 2 and 3
- Priority 4
- Priority 5
- Priority 6
- Unknown priorities

#### 9.23.1.4 Control Breaks

##### 9.23.1.4.1 Agency

A page break will occur on change in agency.

### *9.23.1.5 Grand Total*

State totals will be printed when the state or all option is selected.

### *9.23.1.6 Frequency and Distribution*

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

## 9.24 Generate Redeemed Participation High Risk Priority Goal Report Dialog

When this report is selected, the system will display the Generate Redeemed Participation High Risk Priority Goal Report Dialog to select criteria for printing the Redeemed Participation High Risk Priority Goal Report.

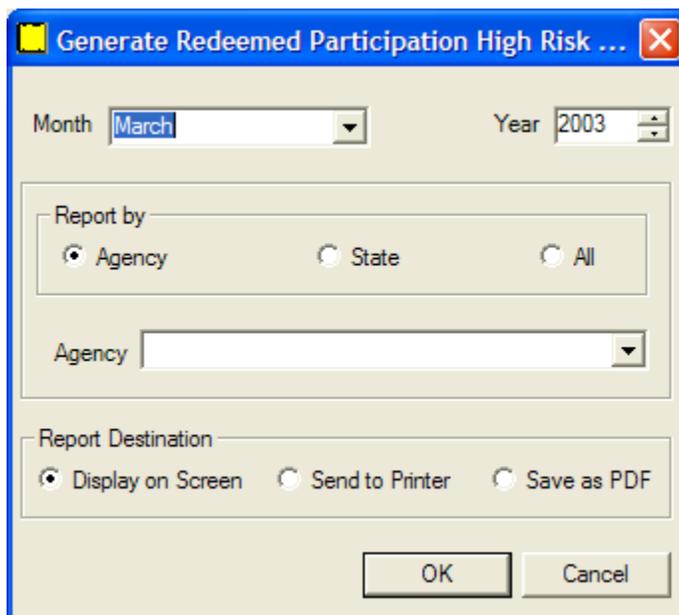


Figure 12 – Generate Redeemed Participation High Risk Priority Goal Report Dialog

### 9.24.1 Controls

#### 9.24.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Redeemed Participation High Risk Priority Goal Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.24.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Redeemed Participation High Risk Priority Goal Report = Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.24.1.3 Report By Radio Button

This control allows the user to select a report break. The options are agency break only, state grand total only or all. The control will be enabled when the Generate Redeemed Participation High Risk Priority Goal Report = Dialog is enabled. It will default to Agency.

### 9.24.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Redeemed Participation High Risk Priority Goal Report = Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.24.1.5 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Redeemed Participation High Risk Priority Goal Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.24.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Redeemed Participation High Risk Priority Goal Report = Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 9.24.1.7 Cancel Button

This control allows the user to exit the Generate Redeemed Participation High Risk Priority Goal Report = Dialog. The control will be enabled when the Generate Redeemed Participation High Risk Priority Goal Report = Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.24.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Redeemed Participation High Risk Priority Goal Report Dialog.

### 9.24.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Redeemed Participation High Risk Priority Goal Report”

- The Month will default to the current month of the Process\_Control table.
- The Report by Agency radio button is initially selected.
- The Display on Screen radio button is initially selected.

#### 9.24.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Redeemed Participation High Risk Priority Goal Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Redeemed Participation High Risk Priority Goal Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Redeemed Participation High Risk Priority Goal Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Redeemed Participation High Risk Priority Goal Report dialog and return the user to the Generate Reports dialog.

### **9.25 Redeemed Participation High Risk Priority Goal (Output) CLD012**

The user may generate the Redeemed Participation High Risk Priority Goal Report from the Generate Redeemed Participation High Risk Priority Goal Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual agency summaries and the state summary will be printed.

The Redeemed Participation High Risk Priority Goal is a month-by-month count of priority one and two participants who redeemed at least one food instrument that was issued in the reported month. Participants are counted in each month that he or she redeemed a food instrument that was issued in the reported month. Issuance is based on the participation date value, not the date the food instrument is printed. A redeemed food instrument is a food instrument presented for payment. Participants are included in the count even if the bank rejected all redeemed food instruments.

This report monitors the achievement of the local agencies toward their respective goals for priority one and two participants. Achievement of the goals has an impact on additional administrative funding.

CLD012		<STATE NAME DEPARTMENT OF HEALTH> REDEEMED PARTICIPATION HIGH RISK PRIORITY GOAL MONTH OF <MARCH 2003>											RUN DATE	XX/XX/XXXX
													RUN TIME	XX:XX:XX
													PAGE:	XXX
<COUNTY OR AGENCY OR STATE TOTAL>														
	OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	C/O	
	C/O	C/O	C/O	C/O	30DY	ISSD							AVG	
HIGH RISK PRIORITY - GOAL														
AVERAGE MONTHLY - NUMBER														
ADMIN DOLLAR FUNDED														
PTY 1	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	
PTY 2	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	
TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	
ACHIEVEMENT PCT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	
*** END OF LISTING ***														

### 9.25.1.1 Data Elements

#### 9.25.1.1.1 Month of

##### 9.25.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.25.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.25.1.1.2 County / Agency / State Total

##### 9.25.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting county data, the county code and description will be printed.
- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.25.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.25.1.1.3 High Risk Priority Goal

##### 9.25.1.1.3.1 Origin of Data Element

This value comes from the Priority\_1 and Priority\_2 attributes of the Local\_Agency\_Eligibles entity.

High-risk priority goal information is available at the local agency level only. When printing the state report, the value will be the total of all local agencies.

##### 9.25.1.1.3.2 Format

This value is a seven-digit number.

#### 9.25.1.1.4 Priority Total (Monthly Count)

##### *9.25.1.1.4.1 Origin of Data Element*

This value is the total count of selected participants, grouped by reported month. If a participant's priority value is not valid for the WIC Category, the participant is not included in the count.

##### *9.25.1.1.4.2 Format*

This value is a six-digit number.

#### 9.25.1.1.5 Percent (Monthly)

##### *9.25.1.1.5.1 Origin of Data Element*

This value is calculated by dividing the priority one and two redeemed total for the month by the priority one and two goal total. If the goals for the current fiscal year are not available, the achievement percent is zero. This value is calculated for closeout months only.

##### *9.25.1.1.5.2 Format*

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

#### 9.25.1.1.6 C/O Avg

##### *9.25.1.1.6.1 Origin of Data Element*

This value is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

##### *9.25.1.1.6.2 Format*

This value is a six-digit number.

### *9.25.1.2 Filter Criteria*

#### 9.25.1.2.1 Base of Data

All WIC participants that received benefits and redeemed at least one food instrument are included in the report totals. Participants must meet the following selection criteria.

- Rdmnd\_This\_Month attribute of the Caseload\_Count entity equals 'Y'
- Participation\_CYM attribute of the Caseload\_Count entity equals the reported month
- Priority attribute of the Caseload\_Count entity equals '1' or '2' and is a valid priority for that category

- Program\_Code attribute of the Caseload\_Count entity equals the WIC value

#### 9.25.1.2.2 High Risk Priority Goal

High-risk priority goal information must meet the following selection criteria.

- Agency\_ID attribute of the Local\_Agency\_Eligibles entity equals the agency being reported
- Fiscal\_Year\_ID attribute of the Local\_Agency\_Eligibles entity equals the fiscal year being reported

#### 9.25.1.2.3 Agency, State, All

If an individual agency is selected, summary data for each county within the agency and summary data for that agency will be included. If all agencies are selected, summary data for all agencies and summary data for each county within the agency will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all agencies and state will be selected in the following sequence.

- County 01 summary
- County 02 summary
- Agency 01 summary
- County 03 summary
- County 04 summary
- Agency 02 summary
- State summary

### 9.25.1.3 Sort Order

#### 9.25.1.3.1 Agency / State Total

This report will be sorted by agency code and county code and state totals, depending on selection criteria of the report.

- County will be sorted within agency code.
- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by agency code.

#### 9.25.1.3.2 Priority

This report will be sorted by priority within agency/state. Data will be reported in the following sequence.

- Priority 1
- Priority 2

#### ***9.25.1.4 Control Breaks***

##### ***9.25.1.4.1 Agency***

A page break will occur on change in agency.

#### ***9.25.1.5 Grand Total***

State totals will be printed when the state or all option is selected.

#### ***9.25.1.6 Frequency and Distribution***

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

## 9.26 Generate Reported Participation High-Risk Outreach Report Dialog

When this report is selected, the system will display the Generate Reported Participation High-Risk Outreach Report Dialog to select criteria for printing the Reported Participation High-Risk Outreach Report.

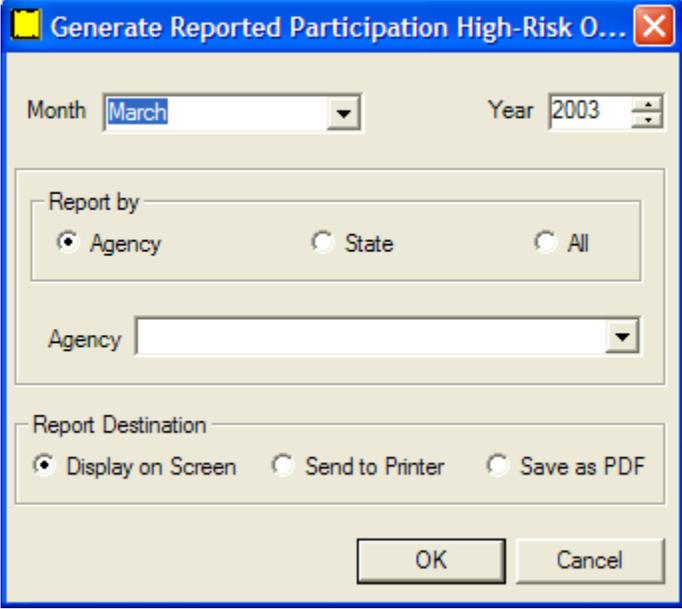


Figure 13 – Generate Reported Participation High-Risk Outreach Report Dialog

### 9.26.1 Controls

#### 9.26.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Reported Participation High-Risk Outreach Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.26.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Reported Participation High-Risk Outreach Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.26.1.3 Report By Radio Button

This control allows the user to select a report break. The options are agency break only, state grand total only or all. The control will be enabled when the Generate Reported Participation High-Risk Outreach Report Dialog is enabled. It will default to Agency.

### 9.26.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Reported Participation High-Risk Outreach Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.26.1.5 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Reported Participation High-Risk Outreach Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.26.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Reported Participation High-Risk Outreach Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 9.26.1.7 Cancel Button

This control allows the user to exit the Generate Reported Participation High-Risk Outreach Report Dialog. The control will be enabled when the Generate Reported Participation High-Risk Outreach Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.26.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Reported Participation High-Risk Outreach Report Dialog.

### 9.26.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Reported Participation High-Risk Outreach Report”
- The Month will default to the current month of the Process\_Control table.
- The Report by Agency radio button is initially selected.

- The Display on Screen radio button is initially selected.

#### 9.26.2.2 Edits

Upon selection of the OK button:

- select thIf no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Control
- the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Reported Participation High-Risk Outreach Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Reported Participation High-Risk Outreach Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Reported Participation High-Risk Outreach Report dialog and invoke a standard windows save as dialog to allow the user to e destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Reported Participation High-Risk Outreach Report dialog and return the user to the Generate Reports dialog.

### ***9.27 Reported Participation High-Risk Outreach (Output) CLD013***

The user may generate the Reported Participation High-Risk Outreach Report from the Generate Reported Participation High-Risk Outreach Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual agency summaries and the state summary will be printed.

The Reported Participation High-Risk Outreach is a month-by-month count of high-risk participants who were issued at least one food instrument. High-risk participants are those issued a food instrument with a priority value of '1', '2' or '3'. Participants are counted in each month that they were issued a high-risk food instrument. Issuance is based on the participation date value, not the date the food instrument is printed.

Within each category, totals are accumulated for applicable high-risk priorities.

CLD013		<STATE NAME DEPARTMENT OF HEALTH> REPORTED PARTICIPATION HIGH-RISK OUTREACH MONTH OF <MARCH 2003>											RUN DATE	XX/XX/XXXX
													RUN TIME	XX:XX:XX
													PAGE:	XXX
<COUNTY OR AGENCY OR STATE TOTAL>														
		OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	C/O
		C/O	C/O	C/O	C/O	30DY	ISSD							AVG
TOTAL HIGH-RISK		XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT		XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
WOMEN - TOTAL		XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT		XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
PRIORITY 1		XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT		XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
PRIORITY 2		XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT		XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
PRIORITY 3		XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT		XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
WOMEN - P		XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT		XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
PRIORITY 1		XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT		XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
WOMEN - B		XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT		XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
PRIORITY 1		XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT		XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
PRIORITY 2		XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT		XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
*** END OF LISTING ***														

### 9.27.1.1 Data Elements

#### 9.27.1.1.1 Month of

##### 9.27.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.27.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.27.1.1.2 County / Agency / State Total

##### 9.27.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting county data, the county code and description will be printed.
- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.27.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.27.1.1.3 Total High-Risk (Monthly Count)

##### 9.27.1.1.3.1 Origin of Data Element

This value is the total count of selected participants, grouped by reported month.

##### 9.27.1.1.3.2 Format

This value is a six-digit number.

#### 9.27.1.1.4 Category Total (Monthly Count)

##### 9.27.1.1.4.1 Origin of Data Element

This value is the total count of selected participants, grouped by the WICStatus attribute of the Caseload\_Count entity for each reported month.

*9.27.1.1.4.2 Format*

This value is a six-digit number.

9.27.1.1.5 Priority Total (Monthly Count)

*9.27.1.1.5.1 Origin of Data Element*

This value is the total count of selected participants, grouped by the WICStatus and Priority attributes of the Caseload\_Count entity for each reported month.

*9.27.1.1.5.2 Format*

This value is a six-digit number.

9.27.1.1.6 Percent (Monthly)

*9.27.1.1.6.1 Origin of Data Element*

This value is calculated by dividing the applicable line total for the month by the total reported participation (monthly count) for the same month. The total reported participation value includes all priorities.

*9.27.1.1.6.2 Format*

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

9.27.1.1.7 C/O Avg

*9.27.1.1.7.1 Origin of Data Element*

This value is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

*9.27.1.1.7.2 Format*

This value is a six-digit number.

9.27.1.1.8 Percent (C/O Avg)

*9.27.1.1.8.1 Origin of Data Element*

This value is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

#### *9.27.1.1.8.2 Format*

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

#### *9.27.1.2 Filter Criteria*

##### *9.27.1.2.1 Base of Data*

All high-risk WIC participants that received benefits are included in the report totals. Participants must meet the following selection criteria.

- Rpted\_This\_Month attribute of the Caseload\_Count entity equals 'Y'
- Participation\_CYM attribute of the Caseload\_Count entity equals the reported month
- Priority attribute of the Caseload\_Count entity equals '1', '2' or '3'
- Program\_Code attribute of the Caseload\_Count entity equals the WIC value

##### *9.27.1.2.2 Agency, State, All*

If an individual agency is selected, summary data for each county within the agency and summary data for that agency will be included. If all agencies are selected, summary data for all agencies and summary data for each county within the agency will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all agencies and state will be selected in the following sequence.

- County 01 summary
- County 02 summary
- Agency 01 summary
- County 03 summary
- County 04 summary
- Agency 02 summary
- State summary

#### *9.27.1.3 Sort Order*

##### *9.27.1.3.1 Agency / State Total*

This report will be sorted by agency code and county code and state totals, depending on selection criteria of the report.

- County will be sorted within agency code.
- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.

- If all is selected, the report will be sorted by agency code.

#### 9.27.1.3.2 Category and Priority

This report will be sorted by category and priority within agency/state. Data will be reported in the following sequence.

- Total high-risk participation
- Woman high-risk total (category P, B and N)
- Women by high-risk priority
- Pregnant high-risk women total (category P)
- Pregnant women by high-risk priority
- Breastfeeding high-risk women total (category B)
- Breastfeeding women by high-risk priority
- Non-breastfeeding high-risk women total (category N)
- Non-breastfeeding women by high-risk priority
- Infant high-risk total (category I)
- Infants by high-risk priority
- Child high-risk total (category C)
- Children by high-risk priority

#### 9.27.1.4 Control Breaks

##### 9.27.1.4.1 Agency

A page break will occur on change in agency.

#### 9.27.1.5 Grand Total

State totals will be printed when the state or all option is selected.

#### 9.27.1.6 Frequency and Distribution

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

## 9.28 Generate Estimated Eligible Comparison Reported Participation Report Dialog

When this report is selected, the system will display the Generate Estimated Eligible Comparison Reported Participation Report Dialog to select criteria for printing the Estimated Eligible Comparison Reported Participation Report.

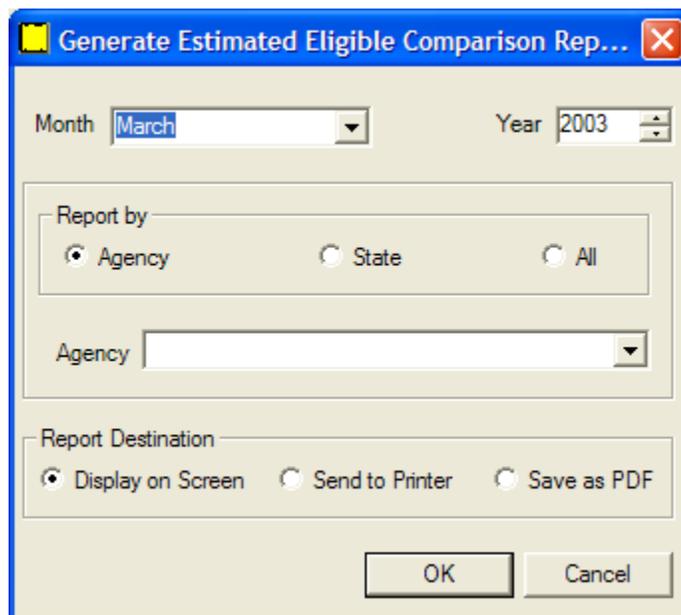


Figure 14 – Generate Estimated Eligible Comparison Reported Participation Report Dialog

### 9.28.1 Controls

#### 9.28.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Estimated Eligible Comparison Reported Participation Report Dialog is enabled. It will be filled with a list of months from the Reference\_Dictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.28.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Estimated Eligible Comparison Reported Participation Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.28.1.3 Report By Radio Button

This control allows the user to select a report break. The options are agency break only, state grand total only or all. The control will be enabled when the Generate Estimated Eligible Comparison Reported Participation Report Dialog is enabled. It will default to Agency.

### 9.28.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Estimated Eligible Comparison Reported Participation Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.28.1.5 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Estimated Eligible Comparison Reported Participation Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.28.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Estimated Eligible Comparison Reported Participation Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 9.28.1.7 Cancel Button

This control allows the user to exit the Generate Estimated Eligible Comparison Reported Participation Report Dialog. The control will be enabled when the Generate Estimated Eligible Comparison Reported Participation Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.28.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Estimated Eligible Comparison Reported Participation Report Dialog.

### 9.28.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Estimated Eligible Comparison Reported Participation Report”

- The Month will default to the current month of the Process\_Control table.
- The Report by Agency radio button is initially selected.
- The Display on Screen radio button is initially selected.

#### 9.28.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Estimated Eligible Comparison Reported Participation Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Estimated Eligible Comparison Reported Participation Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Estimated Eligible Comparison Reported Participation Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Estimated Eligible Comparison Reported Participation Report dialog and return the user to the Generate Reports dialog.

### **9.29 Estimated Eligible Comparison Reported Participation (Output) CLD014**

The user may generate the Estimated Eligible Comparison Reported Participation Report from the Generate Estimated Eligible Comparison Reported Participation Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual agency summaries and the state summary will be printed.

The Estimated Eligible Comparison Reported Participation is a month-by-month count of participants by priority who were issued at least one food instrument for the reported month. Participants are counted in each month that he or she was issued a food instrument. Issuance is based on the participation date value, not the date the food instrument is printed.

The participation count is compared to the amount of estimated eligibles. Estimated eligible counts are available for pregnant women, postpartum women (breastfeeding and non-breastfeeding women combined), infants, and children. Estimated eligible counts are provided by the state on a yearly basis and are a monthly average count of the number of people eligible to be served.

Totals are printed by priority for all WIC Category combined. The totals for each WIC Category are also printed. Within the priority totals, high-risk priorities are subtotaled. High-risk priorities are priorities '1', '2' and '3'. If a participant has an unknown priority or a priority that is not valid for their category, the participant is included in the 'Unknown' priority count.

CLD014		<STATE NAME DEPARTMENT OF HEALTH> ESTIMATED ELIGIBLE COMPARISON REPORTED PARTICIPATION MONTH OF <MARCH 2003>										RUN DATE	XX/XX/XXXX
												RUN TIME	XX:XX:XX
												PAGE:	XXX
<AGENCY OR STATE TOTAL>													
	OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	C/O
	C/O	C/O	C/O	C/O	30DY	ISSD							AVG
EST ELIGIBLES	XXX,XXX												
PRIORITY SUMMARY	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
PRIORITY 1	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
PRIORITY 2	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
PRIORITY 3	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
-----													
SUB-TOTAL 1, 2, 3	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
PRIORITY 4	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
PRIORITY 5	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
PRIORITY 6	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
UNKNOWN	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
*** END OF LISTING ***													

CLD014	<STATE NAME DEPARTMENT OF HEALTH> ESTIMATED ELIGIBLE COMPARISON REPORTED PARTICIPATION MONTH OF <MARCH 2003>											RUN DATE XX/XX/XXXX	
												RUN TIME XX:XX:XX	
												PAGE: XXX	
<AGENCY OR STATE TOTAL>													
	OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	C/O
	C/O	C/O	C/O	C/O	30DY	ISSD							AVG
WOMEN	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X
PREGNANT	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X
POSTPARTUM	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X
BREASTFEEDING	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX
NON-B/F	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX
INFANTS	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X
NON-REBATE	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X
REBATE	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X
CHILDREN	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X
*** END OF LISTING ***													

### 9.29.1.1 Data Elements

#### 9.29.1.1.1 Month of

##### 9.29.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.29.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.29.1.1.2 Agency / State Total

##### 9.29.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.29.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.29.1.1.3 Estimated Eligibles (Priority section)

##### 9.29.1.1.3.1 Origin of Data Element

This value is the sum of the Pregnant\_Woman, Post\_Partum\_Women, Infants and Children attributes of the Local\_Agency\_Eligibles entity.

##### 9.29.1.1.3.2 Format

This value is a seven-digit number.

#### 9.29.1.1.4 Priority Summary (Monthly Count of Priority section)

##### 9.29.1.1.4.1 Origin of Data Element

This value is the total count of selected participants, grouped by reported month.

##### 9.29.1.1.4.2 Format

This value is a six-digit number.

#### 9.29.1.1.5 Priority Total (Monthly Count of Priority section)

##### *9.29.1.1.5.1 Origin of Data Element*

This value is the total count of selected participants, grouped by the Priority attribute of the Caseload\_Count entity for each reported month. If a participant's priority value is unknown or is a value that is not valid for the WIC Category, the count is accumulated in the 'UNKNOWN' priority.

##### *9.29.1.1.5.2 Format*

This value is a six-digit number.

#### 9.29.1.1.6 Category Total (Monthly Count of Category section)

##### *9.29.1.1.6.1 Origin of Data Element*

This value is the total count of selected participants, grouped by the WICStatus attribute of the Caseload\_Count entity for each reported month. The total for infants is subset by infants that were issued a rebate item and those that were not.

##### *9.29.1.1.6.2 Format*

This value is a six-digit number.

#### 9.29.1.1.7 Percent (Monthly)

##### *9.29.1.1.7.1 Origin of Data Element*

This value is calculated by dividing the applicable line total for the estimated eligible value.

The priority percentages on the priority summary page use the total estimated eligible count. On the category total page, the percentage for pregnant women uses the pregnant women eligible count. The percentages for breastfeeding and non-breastfeeding women use the postpartum eligible count. The infant percentages use the infant estimated eligible count. The percentage for children uses the children estimated eligible count.

##### *9.29.1.1.7.2 Format*

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

#### 9.29.1.1.8 C/O Avg

##### *9.29.1.1.8.1 Origin of Data Element*

This value is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

##### *9.29.1.1.8.2 Format*

This value is a six-digit number.

#### 9.29.1.1.9 Percent (C/O Avg)

##### *9.29.1.1.9.1 Origin of Data Element*

This value is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

##### *9.29.1.1.9.2 Format*

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

#### 9.29.1.2 Filter Criteria

##### 9.29.1.2.1 Base of Data

All WIC participants that received benefits are included in the report totals. Participants must meet the following selection criteria.

- Rpted\_This\_Month attribute of the Caseload\_Count entity equals 'Y'
- Participation\_CYM attribute of the Caseload\_Count entity equals the reported month
- Program\_Code attribute of the Caseload\_Count entity equals the WIC value

##### 9.29.1.2.2 Agency, State, All

If an individual agency is selected, summary data for that agency will be included. If all agencies are selected, summary data for all agencies will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all agencies and state will be selected in the following sequence.

- Agency 01 summary
- Agency 02 summary
- State summary

### **9.29.1.3 Sort Order**

#### **9.29.1.3.1 Agency / State Total**

This report will be sorted by agency code and state totals, depending on selection criteria of the report.

- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by agency code.

#### **9.29.1.3.2 Priority / Category**

The priority section will be sorted by priority within agency/state. Data will be reported in the following sequence.

- Total reported participation
- Priority 1
- Priority 2
- Priority 3
- Sub-total of priorities 1, 2 and 3
- Priority 4
- Priority 5
- Priority 6
- Unknown priorities

The category section will be sorted by category within agency/state. Data will be reported in the following sequence.

- Total women
- Pregnant women
- Postpartum women
- Breastfeeding women
- Non-breastfeeding women
- Infants
- Infants not issued rebates
- Infants issued rebates
- Children

### **9.29.1.4 Control Breaks**

#### **9.29.1.4.1 Agency**

A page break will occur on change in agency.

### **9.29.1.5 Grand Total**

State totals will be printed when the state or all option is selected.

### *9.29.1.6 Frequency and Distribution*

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

### 9.30 Generate Participation Processing Statistics Report Dialog

When this report is selected, the system will display the Generate Participation Processing Statistics Report Dialog to select criteria for printing the Participation Processing Statistics Report.

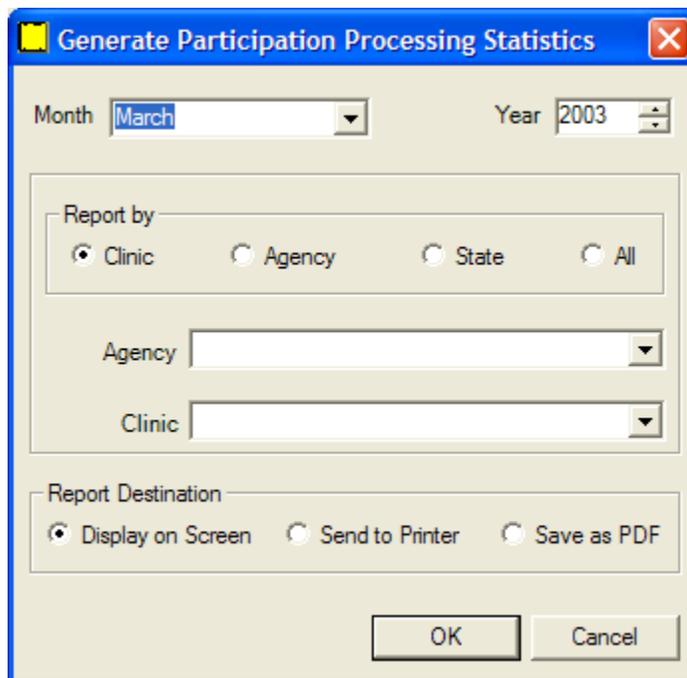


Figure 15 – Generate Participation Processing Statistics Report Dialog

#### 9.30.1 Controls

##### 9.30.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Participation Processing Statistics Report Dialog is enabled. It will be filled with a list of months from the Reference\_Dictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

##### 9.30.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Participation Processing Statistics Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.30.1.3 Report By Radio Button

This control allows the user to select a report break. Clinic break only, Agency break only, State grand total only or all three. The control will be enabled when the Generate Participation Processing Statistics Report Dialog is enabled. It will default to Clinic.

### 9.30.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Participation Processing Statistics Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.30.1.5 Clinic Dropdown List

This control allows the user to select a specific clinic. The control will be enabled when the Generate Participation Processing Statistics Report Dialog is enabled. It will be disabled if the Report By value of Agency or All or State is selected. It will be filled with all clinics in the clinic entity for the selected agency (by Agency and Clinic). It will default to blank.

### 9.30.1.6 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Participation Processing Statistics Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.30.1.7 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Participation Processing Statistics Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 9.30.1.8 Cancel Button

This control allows the user to exit the Generate Participation Processing Statistics Report Dialog. The control will be enabled when the Generate Participation Processing Statistics Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.30.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Participation Processing Statistics Report Dialog.

### 9.30.2.1 *Initializing the Interface*

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Participation Processing Statistics Report”
- The Month will default to the current month of the Process\_Control table.
- The Report by Clinic radio button is initially selected.
- The Display on Screen radio button is initially selected.

### 9.30.2.2 *Edits*

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Clinic or Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the Agency.”
- If the Clinic radio button is selected and no selection has been made in the Clinic dropdown, the system will display a standard error message with the text “A selection is required in the Clinic.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Participation Processing Statistics Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Participation Processing Statistics Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Participation Processing Statistics Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Participation Processing Statistics Report dialog and return the user to the Generate Reports dialog.

### ***9.31 Participation Processing Statistics (Output) CLD015***

The user may generate the Participation Processing Statistics Report from the Generate Participation Processing Statistics Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual clinics, agency summaries and the state summary will be printed.

The Participation Processing Statistics is a statistical summary of enrollment totals, reported participation and redeemed participation.

CLD015	<STATE NAME DEPARTMENT OF HEALTH> PARTICIPATION PROCESSING STATISTICS MONTH OF <MARCH 2003>												RUN DATE	XX/XX/XXXX
													RUN TIME	XX:XX:XX
													PAGE:	XXX
<CLINIC OR AGENCY OR STATE TOTAL>														
	OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	C/O	
	C/O	C/O	C/O	C/O	30DY	ISSD							AVG	
RPTD PART/ENROLLMENT	XXX.X	XXX.X	XXX.X	XXX.X										XXX.X
RDMD PART/ENROLLMENT	XXX.X	XXX.X	XXX.X	XXX.X										XXX.X
RDMD PART/RPTD PART	XXX.X	XXX.X	XXX.X	XXX.X										XXX.X
OVERDUE RE-CERTS PERCENT	XXX,XXX XXX.X	XXX,XXX XXX.X	XXX,XXX XXX.X	XXX,XXX XXX.X	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
NEW CERTIFICATIONS	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX
TERMINATIONS	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX								XXX,XXX
CATEGORICAL INELIGIBLES	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	
RE-CERTS-TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
RE-CERTS-PRIOR MO	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
RE-CERTS-DUE	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	

CLD015	<STATE NAME DEPARTMENT OF HEALTH> PARTICIPATION PROCESSING STATISTICS MONTH OF <MARCH 2003>											RUN DATE XX/XX/XXXX	
												RUN TIME XX:XX:XX	
												PAGE: XXX	
<CLINIC OR AGENCY OR STATE TOTAL>													
	OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	C/O
	C/O	C/O	C/O	C/O	30DY	ISSD							AVG
WAITING LIST-TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PRIORITY 1	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PRIORITY 2	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PRIORITY 3	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PRIORITY 4	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PRIORITY 5	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PRIORITY 6	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
UNKNOWN	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
NO OF I.D. UNUSED CHKS (UNCLAIMED AND UNREDEEMED)	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX									XXX,XXX
NO OF I.D. UNUSED CKS %	XXX.X	XXX.X	XXX.X	XXX.X									XXX.X
*** END OF LISTING ***													

### 9.31.1.1 Data Elements

#### 9.31.1.1.1 Month of

##### 9.31.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.31.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.31.1.1.2 Clinic / Agency / State Total

##### 9.31.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting clinic data, the agency code, clinic code and clinic description will be printed.
- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.31.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.31.1.1.3 Reported Participation/Enrollment (Monthly Count)

##### 9.31.1.1.3.1 Origin of Data Element

This value is calculated by dividing the total WIC reported participation by the total enrollment. This attribute is calculated for closeout months only.

The total WIC reported participation is the count of participants from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month, the Rpted\_This\_Month attribute is equal to ‘Y’ and the Program\_Code attribute is equal to the WIC value.

The total WIC enrollment is the count of participants from the Caseload\_Count\_Enrollment entity where the Participation\_CYM attribute is equal to the reported month, the Enrolled\_This\_Month attribute is equal to ‘Y’ and the Program\_Code attribute is equal to the WIC value.

#### *9.31.1.1.3.2 Format*

This value is a three-digit number plus one decimal place.

### 9.31.1.1.4 Redeemed Participation/Enrollment (Monthly Count)

#### *9.31.1.1.4.1 Origin of Data Element*

This value is calculated by dividing the total WIC redeemed participation by the total WIC enrollment. This attribute is calculated for closeout months only.

The total redeemed participation is the count of participants from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month, the Rdmd\_This\_Month attribute is equal to 'Y' and the Program\_Code attribute is equal to the WIC value. The total enrollment is the count of participants from the Caseload\_Count\_Enrollment entity where the Participation\_CYM attribute is equal to the reported month, the Enrolled\_This\_Month attribute is equal to 'Y' and the Program\_Code attribute is equal to the WIC value.

#### *9.31.1.1.4.2 Format*

This value is a three-digit number plus one decimal place.

### 9.31.1.1.5 Redeemed Participation/Reported Participation (Monthly Count)

#### *9.31.1.1.5.1 Origin of Data Element*

This value is calculated by dividing the total redeemed participation by the total reported participation. This attribute is calculated for closeout months only.

The total redeemed participation is the count of participants from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month, the Rdmd\_This\_Month attribute is equal to 'Y' and the Program\_Code attribute is equal to the WIC value.

The total reported participation is the count of participants from the Caseload\_Count entity where the Participation\_CYM is equal to the reported month attribute, the Rpted\_This\_Month attribute is equal to 'Y' and the Program\_Code attribute is equal to the WIC value.

#### *9.31.1.1.5.2 Format*

This value is a three-digit number plus one decimal place.

#### 9.31.1.1.6 Overdue Re-Certs (Monthly Count)

##### 9.31.1.1.6.1 *Origin of Data Element*

This value is the total count of enrolled participants whose certification period ended during the reported month and they did not subsequently certify. Participants must meet the following selection criteria.

- Enrolled\_This\_Month attribute of the Caseload\_Count\_Enrollment entity equals 'Y'
- Participation\_CYM attribute of the Caseload\_Count\_Enrollment entity equals the reported month
- Current\_End\_Date attribute of the Caseload\_Count\_Enrollment entity equals the reported month
- Current\_Effective\_Date attribute of the Caseload\_Count\_Enrollment < Current\_End\_Date attribute of the Caseload\_Count\_Enrollment entity
- Categorically\_Ineligible\_Date attribute of the Caseload\_Count\_Enrollment entity > the reported month
- Termination\_Date attribute of the Caseload\_Count\_Enrollment entity is zero
- Program\_Code attribute of the Caseload\_Count\_Enrollment entity equals the WIC value

##### 9.31.1.1.6.2 *Format*

This value is a six-digit number.

#### 9.31.1.1.7 Percent Overdue Re-Certs (Monthly)

##### 9.31.1.1.7.1 *Origin of Data Element*

This value is calculated by subtracting the Overdue Re-Certs value from the Re-Certs Due. The difference is divided by the Re-Certs Due value. This attribute is calculated for closeout months only. The closeout average attribute does not apply to this line.

##### 9.31.1.1.7.2 *Format*

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

#### 9.31.1.1.8 New Certifications (Monthly Count)

##### 9.31.1.1.8.1 *Origin of Data Element*

This value is the count of enrolled participants new to WIC during the reported month. A participant is counted once in their lifetime. Participants must meet the following selection criteria.

- Enrolled\_This\_Month attribute of the Caseload\_Count\_Enrollment entity equals 'Y'
- Participation\_CYM attribute of the Caseload\_Count\_Enrollment entity equals the reported month
- Orig\_Enrollment\_Date attribute of the Caseload\_Count\_Enrollment entity equals the reported month
- Program\_Code attribute of the Caseload\_Count\_Enrollment entity equals the WIC value

#### 9.31.1.1.8.2 Format

This value is a six-digit number.

#### 9.31.1.1.9 Terminations (Monthly Count)

##### 9.31.1.1.9.1 Origin of Data Element

This value is the count of participants who were terminated during the reported month. Participants must meet the following selection criteria.

- Enrolled\_This\_Month attribute of the Caseload\_Count\_Enrollment entity equals 'Y'
- Participation\_CYM attribute of the Caseload\_Count\_Enrollment entity equals the reported month
- Termination\_Date attribute of the Caseload\_Count\_Enrollment entity equals the reported month
- Program\_Code attribute of the Caseload\_Count\_Enrollment entity equals the WIC value

#### 9.31.1.1.9.2 Format

This value is a six-digit number.

#### 9.31.1.1.10 Categorical Ineligibles (Monthly Count)

##### 9.31.1.1.10.1 Origin of Data Element

This value is the count of participants that are categorically ineligible for WIC benefits during the reported month. A value is printed for all months during the fiscal year. When reporting future months, the total represents the number of participants expected to be categorically ineligible for the future month. The closeout average attribute does not apply to this line. Participants must meet the following selection criteria.

- For 30-day and closeout months

- Enrolled\_This\_Month attribute of the Caseload\_Count\_Enrollment entity equals 'Y'
- Participation\_CYM attribute of the Caseload\_Count\_Enrollment entity equals the reported month
- Categorically\_Ineligible\_Date attribute of the Caseload\_Count\_Enrollment entity equals the Participation\_CYM attribute of the Caseload\_Count\_Enrollment entity
- Program\_Code attribute of the Caseload\_Count\_Enrollment entity equals the WIC value
- For issuance and future months
  - Enrolled\_This\_Month attribute of the Caseload\_Count\_Enrollment entity equals 'Y'
  - Participation\_CYM attribute of the Caseload\_Count\_Enrollment entity equals the reported month
  - Categorically\_Ineligible\_Date attribute of the Caseload\_Count\_Enrollment entity equals the reported month
  - Program\_Code attribute of the Caseload\_Count\_Enrollment entity equals the WIC value

#### 9.31.1.1.10.2 Format

This value is a six-digit number.

#### 9.31.1.1.11 Re-Certs Total (Monthly Count)

##### 9.31.1.1.11.1 Origin of Data Element

This value is the total count of enrolled participants who were subsequently certified during the reported month. This count includes the Re-Certs-Prior Mo total. Participants must meet the following selection criteria.

- Enrolled\_This\_Month attribute of the Caseload\_Count\_Enrollment entity equals 'Y'
- Participation\_CYM attribute of the Caseload\_Count\_Enrollment entity equals the reported month
- Current\_Effective\_Date attribute of the Caseload\_Count\_Enrollment = the reported month
- Orig\_Enrollment\_Date attribute of the Caseload\_Count\_Enrollment entity < Current\_Effective\_Date attribute of the Caseload\_Count\_Enrollment entity

- Program\_Code attribute of the Caseload\_Count\_Enrollment entity equals the WIC value

#### 9.31.1.1.11.2 Format

This value is a six-digit number.

#### 9.31.1.1.12 Re-Certs Prior Mo (Monthly Count)

##### 9.31.1.1.12.1 Origin of Data Element

This value is the total count of enrolled participants who were subsequently certified during the reported month but their certification was due in a prior month. Participants must meet the following selection criteria.

- Enrolled\_This\_Month attribute of the Caseload\_Count\_Enrollment entity equals 'Y'
- Participation\_CYM attribute of the Caseload\_Count\_Enrollment entity equals the reported month
- Current\_Effective\_Date attribute of the Caseload\_Count\_Enrollment = the reported month
- Orig\_Enrollment\_Date attribute of the Caseload\_Count\_Enrollment entity < Current\_Effective\_Date attribute of the Caseload\_Count\_Enrollment entity
- Previous\_End\_Date attribute of the Caseload\_Count\_Enrollment entity > zero and < Current\_Effective\_Date attribute of the Caseload\_Count\_Enrollment entity
- Program\_Code attribute of the Caseload\_Count\_Enrollment entity equals the WIC value

#### 9.31.1.1.12.2 Format

This value is a six-digit number.

#### 9.31.1.1.13 Re-Certs Due (Monthly Count)

##### 9.31.1.1.13.1 Origin of Data Element

This value is the total count of enrolled participants whose certification end date falls within the reported month. A value is printed for all months during the fiscal year. When reporting future months, the total represents the number of participants whose certification end date is in the future month. The closeout average does not apply to this line. Participants must meet the following selection criteria.

- For 30-day and closeout months

- Enrolled\_This\_Month attribute of the Caseload\_Count\_Enrollment entity equals 'Y'
- Participation\_CYM attribute of the Caseload\_Count\_Enrollment entity is one of the reported months
- Current\_End\_Date attribute of the Caseload\_Count\_Enrollment entity equals the reported month
- Current\_Effective\_Date attribute of the Caseload\_Count\_Enrollment entity is not equal to Previous\_End\_Date attribute of Caseload\_Count\_Enrollment entity
- Termination\_Date attribute of the Caseload\_Count\_Enrollment entity equals zero
- Categorically\_Ineligible\_Date attribute of the Caseload\_Count\_Enrollment entity > Current\_End\_Date attribute of the Caseload\_Count\_Enrollment entity
- Program\_Code attribute of the Caseload\_Count\_Enrollment entity equals the WIC value
- For issuance and future months
  - Enrolled\_This\_Month attribute of the Caseload\_Count\_Enrollment entity equals 'Y'
  - Participation\_CYM attribute of the Caseload\_Count\_Enrollment entity is one of the reported months
  - Current\_End\_Date attribute of the Caseload\_Count\_Enrollment entity >= the issuance month
  - Current\_Effective\_Date attribute of the Caseload\_Count\_Enrollment entity is not equal to the issuance month
  - Termination\_Date attribute of the Caseload\_Count\_Enrollment entity equals zero
  - Categorically\_Ineligible\_Date attribute of the Caseload\_Count\_Enrollment entity > Current\_End\_Date attribute of the Caseload\_Count\_Enrollment entity
  - Program\_Code attribute of the Caseload\_Count\_Enrollment entity equals the WIC value

#### 9.31.1.1.13.2 Format

This value is a six-digit number.

#### 9.31.1.1.14 Waiting List-Total and Priority (Monthly Count)

##### 9.31.1.1.14.1 Origin of Data Element

This value is the count of participants that were on a waiting list as of the end of the reported month. A total is calculated for each priority. If a participant has an unknown priority or a priority that is not valid for their category, the participant is included in the 'Unknown' priority count. Participants must meet the following selection criteria.

- Enrolled\_This\_Month attribute of the Caseload\_Count\_Enrollment entity equals 'Y'
- Participation\_CYM attribute of the Caseload\_Count\_Enrollment entity is one of the reported months
- Wait\_List\_Status attribute of the Caseload\_Count\_Enrollment entity equals 'Y'
- Program\_Code attribute of the Caseload\_Count\_Enrollment entity equals the WIC value

##### 9.31.1.1.14.2 Format

This value is a six-digit number.

#### 9.31.1.1.15 No of ID Unused Checks (Monthly Count)

##### 9.31.1.1.15.1 Origin of Data Element

This value is the count of participants that who have at least one food instrument not redeemed as of the end of the closeout month (i.e. at least one food instrument that was not presented to the bank and was not voided). This attribute is calculated for closeout months only. Participants must meet the following selection criteria.

- Rpted\_This\_Month attribute of the Caseload\_Count entity equals 'Y'
- Participation\_CYM attribute of the Caseload\_Count entity is one of the reported months
- Count\_FI\_Issued minus Count\_FI\_Presented minus Count\_FI\_Voided  $\leq 0$ . All attributes are from the Caseload\_Count entity.
- Program\_Code attribute of the Caseload\_Count entity equals the WIC value

##### 9.31.1.1.15.2 Format

This value is a six-digit number.

#### 9.31.1.1.16 No of ID Unused Checks (Monthly Percent)

##### *9.31.1.1.16.1 Origin of Data Element*

This value is calculated by dividing the No of ID Unused Checks by the total reported participation for the closeout month. This attribute is calculated for closeout months only.

The total reported participation is the count of participants from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month attribute and the Rpted\_This\_Month attribute is equal to 'Y'.

##### *9.31.1.1.16.2 Format*

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

#### 9.31.1.1.17 C/O Avg

##### *9.31.1.1.17.1 Origin of Data Element*

This value is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

##### *9.31.1.1.17.2 Format*

This value is a six-digit number.

#### 9.31.1.2 Filter Criteria

##### 9.31.1.2.1 Base of Data

Filter criteria are defined in the data elements section.

##### 9.31.1.2.2 Clinic, Agency, State, All

If an individual clinic is selected, only data for that clinic will be included. If an individual agency is selected, summary data for that agency will be included. If all agencies are selected, summary data for all agencies will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all sites, agencies and state will be selected in the following sequence.

- Agency 01, clinic 01
- Agency 01, clinic 02
- Agency 01 summary
- Agency 02, clinic 21
- Agency 02, clinic 22
- Agency 02 summary
- State summary

### ***9.31.1.3 Sort Order***

#### **9.31.1.3.1 Clinic / Agency / State Total**

This report will be sorted by clinic code, agency code and state totals, depending on selection criteria of the report.

- If more than one clinic is selected, the report will be sorted by agency code then clinic code.
- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by agency code then clinic code.

### ***9.31.1.4 Control Breaks***

#### **9.31.1.4.1 Clinic / Agency**

A page break will occur on change in clinic/agency.

### ***9.31.1.5 Grand Total***

State totals will be printed when the state or all option is selected.

### ***9.31.1.6 Frequency and Distribution***

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

### 9.32 Generate Redeemed Food Instruments/Expenditures Report Dialog

When this report is selected, the system will display the Generate Redeemed Food Instruments/Expenditures Report Dialog to select criteria for printing the Redeemed Food Instruments/Expenditures Report.

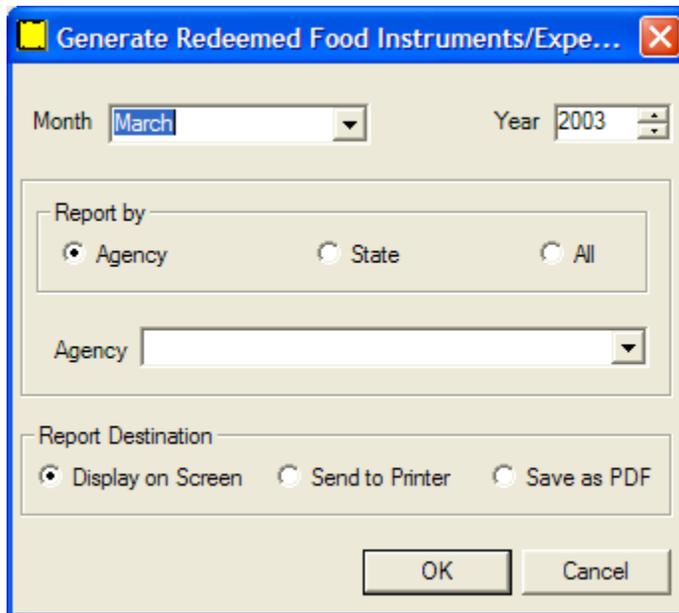


Figure 16 – Generate Redeemed Food Instruments/Expenditures Report Dialog

#### 9.32.1 Controls

##### 9.32.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Redeemed Food Instruments/Expenditures Report Dialog is enabled. It will be filled with a list of months from the Reference\_Dictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

##### 9.32.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Redeemed Food Instruments/Expenditures Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.32.1.3 Report By Radio Button

This control allows the user to select a report break. The options are agency break only, state grand total only or all. The control will be enabled when the Generate Redeemed Food Instruments/Expenditures Report Dialog is enabled. It will default to Agency.

### 9.32.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Redeemed Food Instruments/Expenditures Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.32.1.5 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Redeemed Food Instruments/Expenditures Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.32.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Redeemed Food Instruments/Expenditures Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 9.32.1.7 Cancel Button

This control allows the user to exit the Generate Redeemed Food Instruments/Expenditures Report Dialog. The control will be enabled when the Generate Redeemed Food Instruments/Expenditures Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.32.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Redeemed Food Instruments/Expenditures Report Dialog.

### 9.32.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Redeemed Food Instruments/Expenditures Report”
- The Month will default to the current month of the Process\_Control table.

- The Report by Agency radio button is initially selected.
- The Display on Screen radio button is initially selected.

#### 9.32.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Redeemed Food Instruments/Expenditures Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Redeemed Food Instruments/Expenditures Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Redeemed Food Instruments/Expenditures Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Redeemed Food Instruments/Expenditures Report dialog and return the user to the Generate Reports dialog.

### **9.33 Redeemed Food Instruments/Expenditures (Output) CLD016**

The user may generate the Redeemed Food Instruments/Expenditures Report from the Generate Redeemed Food Instruments/Expenditures Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual agency summaries and the state summary will be printed.

The Redeemed Food Instruments/Expenditures summarizes the redemption and disposition of food instruments for the reported month.

CLD016	<STATE NAME DEPARTMENT OF HEALTH> REDEEMED FOOD INSTRUMENTS/EXPENDITURES MONTH OF <MARCH 2003>											RUN DATE	XX/XX/XXXX
												RUN TIME	XX:XX:XX
												PAGE:	XXX
<AGENCY OR STATE TOTAL>													
	OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	C/O
	C/O	C/O	C/O	C/O	30DY	ISSD							AVG
RDMD FOOD DOLLARS	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
RDMD DOLLARS YTD (IN THOUSANDS - CUM)	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
RDMD FOOD INSTR FACTORS CO/ISSUE	XXX,XXX XXX.X	XXX,XXX XXX.X	XXX,XXX XXX.X	XXX,XXX XXX.X	XXX,XXX XXX.X	XXX,XXX XXX.X							XXX,XXX XXX.X
FOOD INSTR. DISPOSITION													
TOTAL	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
REDEEMED NUMBER	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
VOIDED NUMBER	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
UNRDMD NUMBER	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX							XXX,XXX
PERCENT	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X	XXX.X							XXX.X
*** END OF LISTING ***													

### 9.33.1.1 Data Elements

#### 9.33.1.1.1 Month of

##### 9.33.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.33.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.33.1.1.2 Agency / State Total

##### 9.33.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.33.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.33.1.1.3 Rdmd Food Dollars (Monthly Count)

##### 9.33.1.1.3.1 Origin of Data Element

This value is calculated by totaling the Sum\_FI\_Redeemed attribute of the Caseload\_Count entity where Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value. The value is rounded to the nearest dollar.

##### 9.33.1.1.3.2 Format

This value is a twelve-digit number.

#### 9.33.1.1.4 Rdmd Dollars YTD (Monthly Count)

##### *9.33.1.1.4.1 Origin of Data Element*

This value is calculated by totaling the Sum\_FI\_Redeemed attribute of the Caseload\_Count entity where Participation\_CYM attribute is <= to the reported month and >= first month of the fiscal year and the Program\_Code attribute is equal to the WIC value. The value is rounded to the nearest thousand dollars.

##### *9.33.1.1.4.2 Format*

This value is a twelve-digit number.

#### 9.33.1.1.5 Rdmd Food Instr (Monthly Count)

##### *9.33.1.1.5.1 Origin of Data Element*

This value is calculated by totaling the Count\_FI\_Redeemed attribute of the Caseload\_Count entity where Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value.

##### *9.33.1.1.5.2 Format*

This value is a ten-digit number.

#### 9.33.1.1.6 Rdmd Food Instr Factors (Monthly Count)

##### *9.33.1.1.6.1 Origin of Data Element*

This value is calculated by dividing the total count of redeemed food instruments by the count of issued food instruments. This attribute is calculated for closeout months only.

The total count of issued food instruments is the total of the Count\_FI\_Issued attribute of the Caseload\_Count entity where Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value.

##### *9.33.1.1.6.2 Format*

This value is a three-digit number plus one decimal place.

#### 9.33.1.1.7 Food Instr Disposition Total (Monthly Count)

##### *9.33.1.1.7.1 Origin of Data Element*

This value is calculated by totaling the Count\_FI\_Issued attribute of the Caseload\_Count entity where Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value.

#### *9.33.1.1.7.2 Format*

This value is a ten-digit number.

### 9.33.1.1.8 Food Instr Disposition Redeemed (Monthly Count)

#### *9.33.1.1.8.1 Origin of Data Element*

This value is calculated by totaling the Count\_FI\_Redeemed attribute of the Caseload\_Count entity where Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value.

#### *9.33.1.1.8.2 Format*

This value is a ten-digit number.

### 9.33.1.1.9 Food Instr Disposition Redeemed Percent (Monthly)

#### *9.33.1.1.9.1 Origin of Data Element*

This value is calculated by dividing the redeemed number by the food instrument disposition total for the reported month.

#### *9.33.1.1.9.2 Format*

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

### 9.33.1.1.10 Food Instr Disposition Voided (Monthly Count)

#### *9.33.1.1.10.1 Origin of Data Element*

This value is calculated by totaling the Count\_FI\_Voided attribute of the Caseload\_Count entity where Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value.

#### *9.33.1.1.10.2 Format*

This value is a ten-digit number.

### 9.33.1.1.11 Food Instr Disposition Voided Percent (Monthly)

#### *9.33.1.1.11.1 Origin of Data Element*

This value is calculated by dividing the voided number by the food instrument disposition total for the reported month.

#### *9.33.1.1.11.2 Format*

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

#### 9.33.1.1.12 Food Instr Disposition UnRdmd (Monthly Count)

##### *9.33.1.1.12.1 Origin of Data Element*

This value is calculated by totaling the Count\_FI\_UnRedeemed\_Not\_Voided attribute of the Caseload\_Count entity where Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value.

##### *9.33.1.1.12.2 Format*

This value is a ten-digit number.

#### 9.33.1.1.13 Food Instr Disposition UnRdmd Percent (Monthly)

##### *9.33.1.1.13.1 Origin of Data Element*

This value is calculated by dividing the unredeemed number by the food instrument disposition total for the reported month.

##### *9.33.1.1.13.2 Format*

This value is a three-digit number plus one decimal place. (If the calculated value exceeds 999.9, the system assigns a default value of 999.9.)

#### 9.33.1.1.14 C/O Avg

##### *9.33.1.1.14.1 Origin of Data Element*

This value is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

##### *9.33.1.1.14.2 Format*

This value is either a ten-digit number or a three-digit number plus one decimal place.

#### 9.33.1.2 Filter Criteria

##### 9.33.1.2.1 Base of Data

Filter criteria are defined in the data elements section.

##### 9.33.1.2.2 Agency, State, All

If an individual agency is selected, summary data for that agency will be included. If all agencies are selected, summary data for all agencies will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all agencies and state will be selected in the following sequence.

- Agency 01 summary

- Agency 02 summary
- State summary

### ***9.33.1.3 Sort Order***

#### **9.33.1.3.1 Agency / State Total**

This report will be sorted by agency code and state totals, depending on selection criteria of the report.

- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by agency code.

### ***9.33.1.4 Control Breaks***

#### **9.33.1.4.1 Agency**

A page break will occur on change in agency.

### ***9.33.1.5 Grand Total***

State totals will be printed when the state or all option is selected.

### ***9.33.1.6 Frequency and Distribution***

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

### 9.34 Generate Food Instrument Package Cost Report Dialog

When this report is selected, the system will display the Generate Food Instrument Package Cost Report Dialog to select criteria for printing the Food Instrument Package Cost Report.

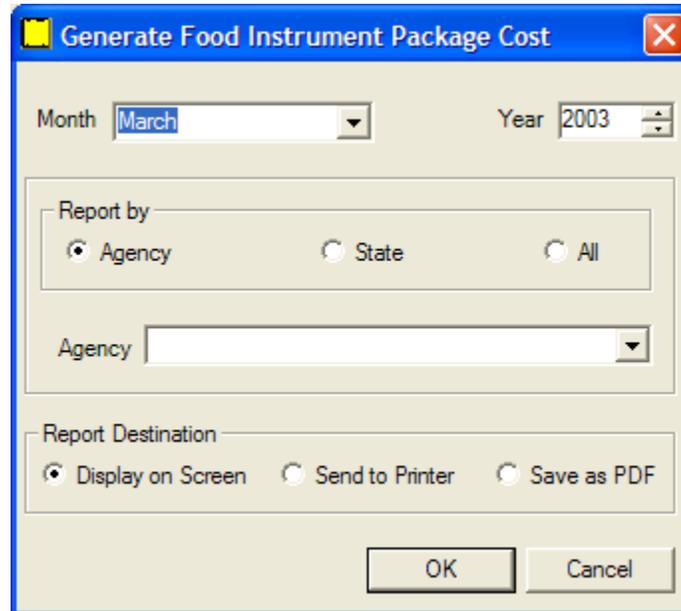


Figure 17 – Generate Food Instrument Package Cost Report Dialog

#### 9.34.1 Controls

##### 9.34.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Food Instrument Package Cost Report Dialog is enabled. It will be filled with a list of months from the Reference\_Dictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

##### 9.34.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Food Instrument Package Cost Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.34.1.3 Report By Radio Button

This control allows the user to select a report break. The options are agency break only, state grand total only or all. The control will be enabled when the Generate Food Instrument Package Cost Report Dialog is enabled. It will default to Agency.

### 9.34.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Food Instrument Package Cost Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.34.1.5 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Food Instrument Package Cost Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.34.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Food Instrument Package Cost Report Dialog is enabled. See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 9.34.1.7 Cancel Button

This control allows the user to exit the Generate Food Instrument Package Cost Report Dialog. The control will be enabled when the Generate Food Instrument Package Cost Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.34.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Food Instrument Package Cost Report Dialog.

### 9.34.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Food Instrument Package Cost Report”
- The Month will default to the current month of the Process\_Control table.
- The Report by Agency radio button is initially selected.

- The Display on Screen radio button is initially selected.

#### 9.34.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Food Instrument Package Cost Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Food Instrument Package Cost Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Food Instrument Package Cost Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Food Instrument Package Cost Report dialog and return the user to the Generate Reports dialog.

### ***9.35 Food Instrument Package Cost (Output) CLD017***

The user may generate the Food Instrument Package Cost Report from the Generate Food Instrument Package Cost Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual agency summaries and the state summary will be printed.

The Food Instrument Package Cost summarizes the costs associated with food packages using the reported participation method, redeemed participation method, and reconciliation method.

CLD017		<STATE NAME DEPARTMENT OF HEALTH> FOOD INSTRUMENT PACKAGE COST MONTH OF <MARCH 2003>											RUN DATE	XX/XX/XXXX
<AGENCY OR STATE TOTAL>													RUN TIME	XX:XX:XX
		OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	C/O
		C/O	C/O	C/O	C/O	30DY	ISSD							AVG
REPORTED PARTICIPATION METHOD														
FOOD PACKAGE COST AVG		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
WOMAN-TOTAL		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
WOMAN-PREGNANT		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
WOMAN-BREASTFEEDING		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
WOMAN-NON-B/F		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
INFANTS		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
CHILDREN		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
NON-REBATE PACKAGE COST AVG		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
CHECKS/REPORTED PARTIC.		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
REDEEMED PARTICIPATION METHOD														
FOOD PACKAGE COST AVG		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
WOMAN-TOTAL		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
WOMAN-PREGNANT		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
WOMAN-BREASTFEEDING		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
WOMAN-NON-B/F		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
INFANTS		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
CHILDREN		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
CHECK COST AVG		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
WOMAN-TOTAL		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
WOMAN-PREGNANT		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
WOMAN-BREASTFEEDING		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
WOMAN-NON-B/F		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
INFANTS		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX
CHILDREN		XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX							XXX.XX

CLD017		<STATE NAME DEPARTMENT OF HEALTH> FOOD INSTRUMENT PACKAGE COST MONTH OF <MARCH 2003>											RUN DATE	XX/XX/XXXX
<AGENCY OR STATE TOTAL>													RUN TIME	XX:XX:XX
		OCT 02	NOV 02	DEC 02	JAN 03	FEB 03	MAR 03	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	C/O

	C/O	C/O	C/O	C/O	30DY	ISSD	AVG
CHECKS/RDMD. PARTIC.	XXX.XX						
WOMAN-TOTAL	XXX.XX						
WOMAN-PREGNANT	XXX.XX						
WOMAN-BREASTFEEDING	XXX.XX						
WOMAN-NON-B/F	XXX.XX						
INFANTS	XXX.XX						
CHILDREN	XXX.XX						

\*\*\* END OF LISTING \*\*\*

### 9.35.1.1 Data Elements

#### 9.35.1.1.1 Month of

##### 9.35.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.35.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.35.1.1.2 Agency / State Total

##### 9.35.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.35.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.35.1.1.3 Reported Participation - Food Package Cost Avg (Monthly Count)

##### 9.35.1.1.3.1 Origin of Data Element

This value is calculated by dividing the total dollars redeemed for the issue month for each category by the reported participation for the issue month for that category. This value is calculated for the total of all participants, women-total, women-pregnant, women-breastfeeding, women-non breastfeeding, infants, and children.

The total dollars redeemed is the sum of the Sum\_FI\_Redeemed attribute from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value. The total reported participation is the count of participants from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month, the Rpted\_This\_Month attribute is equal to ‘Y’ and the Program\_Code attribute is equal to the WIC value.

#### 9.35.1.1.3.2 *Format*

This value is a three-digit number plus two decimal places.

#### 9.35.1.1.4 Reported Participation – Non-Rebate Package CostAvg (Monthly Count)

##### 9.35.1.1.4.1 *Origin of Data Element*

This value is calculated by dividing the total dollars redeemed for non-rebate items for the issue month by the reported participation for the issue month.

The total non-rebate dollars redeemed is the sum of the Sum\_FI\_Redeemed attribute from the Caseload\_Count entity month minus the Sum\_FI\_Redeemed\_Rebate attribute from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value. The total reported participation is the count of participants from the Caseload\_Count entity that meet the following selection criteria.

- Participation\_CYM attribute is equal to the reported month
- The Rpted\_This\_Month attribute is equal to 'Y'
- The Count\_FI\_Issued attribute minus the Count\_FI\_Issued\_Rebate attribute is greater than zero
- The Program\_Code attribute is equal to the WIC value

##### 9.35.1.1.4.2 *Format*

This value is a three-digit number plus two decimal places.

#### 9.35.1.1.5 Reported Participation – Checks/Reported Participation (Monthly Count)

##### 9.35.1.1.5.1 *Origin of Data Element*

This value is calculated by dividing the number of redeemed food instruments for the issue month by the reported participation for the issue month.

The number of redeemed food instruments is the sum of the Count\_FI\_Redeemed attribute from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value. The total reported participation is the count of participants from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month, the Rpted\_This\_Month attribute is equal to 'Y' and the Program\_Code attribute is equal to the WIC value.

##### 9.35.1.1.5.2 *Format*

This value is a three-digit number plus two decimal places.

### 9.35.1.1.6 Redeemed Participation - Food Package Cost Avg (Monthly Count)

#### 9.35.1.1.6.1 Origin of Data Element

This value is calculated by dividing the total dollars redeemed for the issue month for each category by the redeemed participation for the issue month for that category. This value is calculated for the total of all participants, women-total, women-pregnant, women-breastfeeding, women-non breastfeeding, infants, and children.

The total dollars redeemed is the sum of the Sum\_FI\_Redeemed attribute from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value. The total redeemed participation is the count of participants from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month, the Rdmd\_This\_Month attribute is equal to 'Y' and the Program\_Code attribute is equal to the WIC value.

#### 9.35.1.1.6.2 Format

This value is a three-digit number plus two decimal places.

### 9.35.1.1.7 Redeemed Participation – Check Cost Avg (Monthly Count)

#### 9.35.1.1.7.1 Origin of Data Element

This value is calculated by dividing the total dollars redeemed for the issue month for each category by the number of redeemed food instruments for the issue month for that category. This value is calculated for the total of all participants, women-total, women-pregnant, women-breastfeeding, women-non-breastfeeding, infants, and children.

The total dollars redeemed is the sum of the Sum\_FI\_Redeemed attribute from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value. The number of redeemed food instruments is the sum of the Count\_FI\_Redeemed attribute from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value.

#### 9.35.1.1.7.2 Format

This value is a three-digit number plus two decimal places.

### 9.35.1.1.8 Redeemed Participation – Checks/Rdmd Participation (Monthly Count)

#### 9.35.1.1.8.1 Origin of Data Element

This value is calculated by dividing the number of redeemed food instruments for the issue month for each category by the redeemed participation for the issue month for that category. This value is calculated for the total of all participants, women-total, women-pregnant, women-breastfeeding, women-non-breastfeeding, infants, and children.

The number of redeemed food instruments is the sum of the Count\_FI\_Redeemed attribute from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month and the Program\_Code attribute is equal to the WIC value. The total redeemed participation is the count of participants from the Caseload\_Count entity where the Participation\_CYM attribute is equal to the reported month, the Rdmd\_This\_Month attribute is equal to 'Y' and the Program\_Code attribute is equal to the WIC value.

#### 9.35.1.1.8.2 Format

This value is a three-digit number plus two decimal places.

### 9.35.1.1.9 C/O Avg

#### 9.35.1.1.9.1 Origin of Data Element

This value is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included.

#### 9.35.1.1.9.2 Format

This value is a three-digit number plus two decimal places.

### 9.35.1.2 Filter Criteria

#### 9.35.1.2.1 Base of Data

Filter criteria are defined in the data elements section.

#### 9.35.1.2.2 Agency, State, All

If an individual agency is selected, summary data for that agency will be included. If all agencies are selected, summary data for all agencies will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all agencies and state will be selected in the following sequence.

- Agency 01 summary
- Agency 02 summary

- State summary

### ***9.35.1.3 Sort Order***

#### **9.35.1.3.1 Agency / State Total**

This report will be sorted by agency code and state totals, depending on selection criteria of the report.

- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by agency code.

### ***9.35.1.4 Control Breaks***

#### **9.35.1.4.1 Agency**

A page break will occur on change in agency.

### ***9.35.1.5 Grand Total***

State totals will be printed when the state or all option is selected.

### ***9.35.1.6 Frequency and Distribution***

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

### 9.36 Generate Caseload Management Projection System Report Dialog

When this report is selected, the system will display the Generate Caseload Management Projection System Report Dialog to select criteria for printing the Caseload Management Projection System Report.

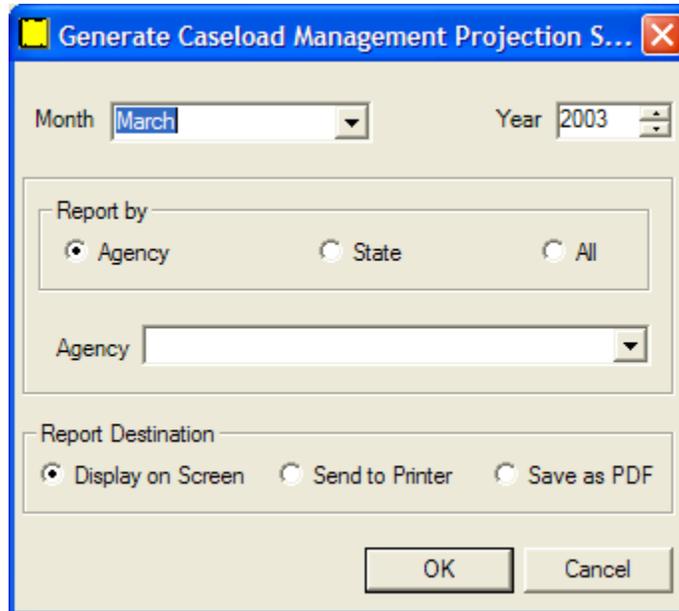


Figure 18 – Generate Caseload Management Projection System Report Dialog

#### 9.36.1 Controls

##### 9.36.1.1 Month Dropdown List

This control allows the user to select report month. The control will be enabled when the Generate Caseload Management Projection System Report Dialog is enabled. It will be filled with a list of months from the Reference\_Dictionary entity, displayed in calendar month order within the list. It will default to blank.

##### 9.36.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Caseload Management Projection System Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.36.1.3 Report By Radio Button

This control allows the user to select a report break. The options are agency break only, state grand total only or all. The control will be enabled when the Generate Caseload Management Projection System Report Dialog is enabled. It will default to Agency.

### 9.36.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Caseload Management Projection System Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.36.1.5 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Caseload Management Projection System Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.36.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Caseload Management Projection System Report Dialog is enabled. See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

### 9.36.1.7 Cancel Button

This control allows the user to exit the Generate Caseload Management Projection System Report Dialog. The control will be enabled when the Generate Caseload Management Projection System Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.36.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Caseload Management Projection System Report Dialog.

### 9.36.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Caseload Management Projection System Report”
- The Month will default to the current month of the Process\_Control table.
- The Report by Agency radio button is initially selected.

- The Display on Screen radio button is initially selected.

### 9.36.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Caseload Management Projection System dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Caseload Management Projection System Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Caseload Management Projection System Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Caseload Management Projection System Report dialog and return the user to the Generate Reports dialog.

### **9.37 Caseload Management Projection System (Output) CLD018**

The user may generate the Caseload Management Projection System Report from the Generate Caseload Management Projection System Report Dialog. This report will also be generated as part of the month-end process using the selection criteria of "All". Individual agency summaries and the state summary will be printed.

The Caseload Management Projection System summarizes enrollment, participation, and redemption totals at the end of the issuance month. Once the month has been reported in this section, the values will not be adjusted to reflect additional data received in the 30-day and closeout months. The following Management Information Summary reports provide input into this report and must be run during the month-end process before this report is requested.

- Enrollment Monthly
- Reported Participation Monthly
- Monthly Redemption Unduplicated
- Redeemed Food Instrument/Expenditures
- Food Instrument Package Cost
- Redeemed Food Instrument/Expenditures

CLD018	<STATE NAME DEPARTMENT OF HEALTH> CASELOAD MANAGEMENT PROJECTION SYSTEM MONTH OF <MARCH 2003>											RUN DATE XX/XX/XXXX	
													RUN TIME XX:XX:XX
													PAGE: XXX
<AGENCY OR STATE TOTAL>													
	OCT 02 C/O	NOV 02 C/O	DEC 02 C/O	JAN 03 C/O	FEB 03 30DY	MAR 03 ISSD	APR 03	MAY 03	JUN 03	JUL 03	AUG 03	SEP 03	
1	REPORT MONTH ABSTRACT	OCT	NOV	DEC	JAN	FEB	MAR	APR	MAY	JUN	JUL	AUG	SEP
2	REPORT YEAR	1996	1996	1996	1997	1997	1997	1997	1997	1997	1997	1997	1997
3	ENROLLMENT-ISSUE	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX						
4	RPTD PARTIC-ISSUE	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX						
5	RDMD PARTIC-30-DAY	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX						
6	RDMD PARTIC-C/O	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX						
7	RDMD CHECKS-30-DAY	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX						
8	RDMD CHECKS-C/O	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX	XXX,XXX						
9	AVG RDMD CHK COST-C/O	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX						
10	AVG RDMD CHK COST-30D	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX						
11	AVG RECON CHK COST-I	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX	XXX.XX						
10	FOOD EXP-C/O	X,XXX,XXX	X,XXX,XXX	X,XXX,XXX	X,XXX,XXX	X,XXX,XXX	X,XXX,XXX						
		X,XXX,XXX	X,XXX,XXX	X,XXX,XXX	X,XXX,XXX	X,XXX,XXX	X,XXX,XXX						
	*** END OF LISTING ***												

### 9.37.1.1 Data Elements

#### 9.37.1.1.1 Month of

##### 9.37.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.37.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.37.1.1.2 Agency / State Total

##### 9.37.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.37.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.37.1.1.3 Report Month Abstract

##### 9.37.1.1.3.1 Origin of Data Element

This value is the abbreviation for the reported month. The reported month value comes from the Report\_Month attribute of the Caseload\_Management\_Projection entity.

##### 9.37.1.1.3.2 Format

This value is a three-character value.

#### 9.37.1.1.4 Report Year

##### 9.37.1.1.4.1 Origin of Data Element

This value comes from the Report\_Year attribute of the Caseload\_Management\_Projection entity.

##### 9.37.1.1.4.2 Format

This value is a three-character value.

#### 9.37.1.1.5 Enrollment-Iss (Monthly Count)

##### *9.37.1.1.5.1 Origin of Data Element*

This value comes from the Enrollment\_Count\_Iss attribute of the Caseload\_Management\_Projection entity where the Report\_Year and Report\_Month concatenated value is equal to the reported month for the selected agency/state.

##### *9.37.1.1.5.2 Format*

This value is a ten-digit number.

#### 9.37.1.1.6 Rptd Partic-Iss (Monthly Count)

##### *9.37.1.1.6.1 Origin of Data Element*

This value comes from the Rptd\_Part\_Iss attribute of the Caseload\_Management\_Projection entity where the Report\_Year and Report\_Month concatenated value is equal to the reported month for the selected agency/state.

##### *9.37.1.1.6.2 Format*

This value is a ten-digit number.

#### 9.37.1.1.7 Rdmd Partic-30D (Monthly Count)

##### *9.37.1.1.7.1 Origin of Data Element*

This value comes from the Rdmd\_Part\_30D attribute of the Caseload\_Management\_Projection entity where the Report\_Year and Report\_Month concatenated value is equal to the reported month for the selected agency/state.

##### *9.37.1.1.7.2 Format*

This value is a ten-digit number.

#### 9.37.1.1.8 Rdmd Partic-C/O (Monthly Count)

##### *9.37.1.1.8.1 Origin of Data Element*

This value comes from the Rdmd\_Part\_CO attribute of the Caseload\_Management\_Projection entity where the Report\_Year and Report\_Month concatenated value is equal to the reported month for the selected agency/state.

##### *9.37.1.1.8.2 Format*

This value is a ten-digit number.

#### 9.37.1.1.9 Rdmd Checks-30D (Monthly Count)

##### *9.37.1.1.9.1 Origin of Data Element*

This value comes from the Rdmd\_Check\_30D attribute of the Caseload\_Management\_Projection entity where the Report\_Year and Report\_Month concatenated value is equal to the reported month for the selected agency/state.

##### *9.37.1.1.9.2 Format*

This value is a twelve-digit number.

#### 9.37.1.1.10 Rdmd Checks-C/O (Monthly Count)

##### *9.37.1.1.10.1 Origin of Data Element*

This value comes from the Rdmd\_Check\_CO attribute of the Caseload\_Management\_Projection entity where the Report\_Year and Report\_Month concatenated value is equal to the reported month for the selected agency/state.

##### *9.37.1.1.10.2 Format*

This value is a twelve-digit number.

#### 9.37.1.1.11 Avg Rdmd Chk Cost-CO (Monthly Count)

##### *9.37.1.1.11.1 Origin of Data Element*

This value comes from the Avg\_Rdmd\_Check\_Cost\_CO attribute of the Caseload\_Management\_Projection entity where Report\_Year and Report\_Month concatenated value is equal to the reported month for the selected agency/state.

##### *9.37.1.1.11.2 Format*

This value is a three-digit number plus two decimal places.

#### 9.37.1.1.12 Avg Rdmd Chk Cost-30D (Monthly Count)

##### *9.37.1.1.12.1 Origin of Data Element*

This value comes from the Avg\_Rdmd\_Check\_Cost\_30D attribute of the Caseload\_Management\_Projection entity where Report\_Year and Report\_Month concatenated value is equal to the reported month for the selected agency/state.

##### *9.37.1.1.12.2 Format*

This value is a three-digit number plus two decimal places.

### 9.37.1.1.13 Avg Recon Chk Cost-Iss (Monthly Count)

#### 9.37.1.1.13.1 Origin of Data Element

This value comes from the Avg\_Recon\_Check\_Cost\_Iss attribute of the Caseload\_Management\_Projection entity where Report\_Year and Report\_Month concatenated value is equal to the reported month for the selected agency/state.

#### 9.37.1.1.13.2 Format

This value is a three-digit number plus two decimal places.

### 9.37.1.1.14 Food Exp-C/O (Monthly Count)

#### 9.37.1.1.14.1 Origin of Data Element

This value comes from the Food\_Exp\_CO attribute of the Caseload\_Management\_Projection entity where Report\_Year and Report\_Month concatenated value is equal to the reported month for the selected service agency/state.

#### 9.37.1.1.14.2 Format

This value is a twelve-digit number.

## 9.37.1.2 Filter Criteria

### 9.37.1.2.1 Base of Data

Filter criteria are defined in the data elements section.

### 9.37.1.2.2 Agency, State, All

If an individual agency is selected, summary data for that agency will be included. If all agencies are selected, summary data for all agencies will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all agencies and state will be selected in the following sequence.

- Agency 01 summary
- Agency 02 summary
- State summary

## 9.37.1.3 Sort Order

### 9.37.1.3.1 Agency / State Total

This report will be sorted by agency code and state totals, depending on selection criteria of the report.

- If more than one agency is selected, the report will be sorted by agency code.
- If the state total is selected, this part of the sort order does not apply.

- If all is selected, the report will be sorted by agency code.

#### ***9.37.1.4 Control Breaks***

##### ***9.37.1.4.1 Agency***

A page break will occur on change in agency.

#### ***9.37.1.5 Grand Total***

State totals will be printed when the state or all option is selected.

#### ***9.37.1.6 Frequency and Distribution***

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

### 9.38 Generate Minority Health Disparity Survey Report Dialog

When this report is selected, the system will display the Generate Minority Health Disparity Survey Report Dialog to select criteria for printing the Minority Health Disparity Survey Report.

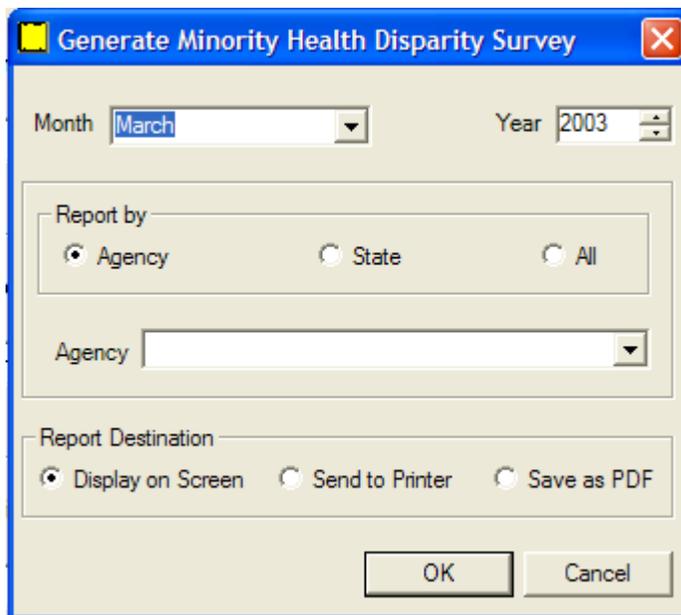


Figure 19 – Generate Minority Health Disparity Survey Report Dialog

#### 9.38.1 Controls

##### 9.38.1.1 Month Dropdown

This control allows the user to select redemption month. The control will be enabled when the Generate Minority Health Disparity Survey Report Dialog is enabled. It will be filled with the following month value: September. It will default to the current month of the Process\_Control entity if the current month is the fiscal year end month. If the current month is not the fiscal year end, it will default to blank.

##### 9.38.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Minority Health Disparity Survey Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

### 9.38.1.3 Report By Radio Button

This control allows the user to select a report break. The options are agency break only, state grand total only or all. The control will be enabled when the Generate Minority Health Disparity Survey Report Dialog is enabled. It will default to Agency.

### 9.38.1.4 Agency Dropdown List

This control allows the user to select a specific agency. The control will be enabled when the Generate Minority Health Disparity Survey Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all agencies in the agency entity. It will default to blank. Characteristics for the Agency dropdown are defined in *Consistencies*.

### 9.38.1.5 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Minority Health Disparity Survey Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

### 9.38.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Minority Health Disparity Survey Report Dialog is enabled. Characteristics for the OK button are defined in *Consistencies*.

### 9.38.1.7 Cancel Button

This control allows the user to exit the Generate Minority Health Disparity Survey Report Dialog. The control will be enabled when the Generate Minority Health Disparity Survey Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

## 9.38.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Minority Health Disparity Survey Report Dialog.

### 9.38.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Minority Health Disparity Survey Report”
- The Month will default to the current month of the Process\_Control table.
- The Report by Agency radio button is initially selected.

- The Display on Screen radio button is initially selected.

#### 9.38.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Agency radio button is selected and no selection has been made in the Agency dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Minority Health Disparity Survey Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Minority Health Disparity Survey Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Minority Health Disparity Survey Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Minority Health Disparity Survey Report dialog and return the user to the Generate Reports dialog.

#### 9.39 Minority Health Disparity Survey (Output) CLD019

The user may generate the Minority Health Disparity Survey from the Generate Minority Health Disparity Survey Report Dialog. This report will also be generated on an annual basis during the September end of month process.

The Minority Health Disparity Survey is a summary of records that fall within the Fiscal year selected from the Caseload-Count-Undup-Federal entity. The report is broken into totals by Minority codes, showing a count for women and a count for infants and children. The Minority codes that have counts accumulated for them are defined in the program to be: 20-African American/Black, 40-American Indian/Alaskan Native, 60 or 70-Asian American, 30 through 38-Hispanic/Latino, 50-Native Hawaiian/Pacific Islander, 88-Other and 99 or blank-Unknown. There will also be a 'Total' count. The report will show totals by Agency and there will another total at the end of the report for the State.

CLD019

<STATE NAME DEPARTMENT OF HEALTH>  
MINORITY HEALTH DISPARITY SURVEY  
FISCAL YEAR <2003>

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

<AGENCY OR STATE TOTAL>

XX

WOMEN	CHILDREN AGED 0 - 5 YEARS	TOTAL
XXX,XXX	XXX,XXX	XXX,XXX

\*\*\* END OF LISTING \*\*\*

### 9.39.1.1 Data Elements

#### 9.39.1.1.1 Fiscal Year

##### 9.39.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted.

##### 9.39.1.1.1.2 Format

This is a four-character value in the format of CCYY.

#### 9.39.1.1.2 Agency/State Total

##### 9.39.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting agency data, the agency code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.39.1.1.2.2 Format

This is a fifty-character value. The format is determined by the information being reported.

#### 9.39.1.1.3 Race Name

##### 9.39.1.1.3.1 Origin of Data Element

This value comes from an array with set headings reflecting the different race names.

##### 9.39.1.1.3.2 Format

This is a fifty-character value.

#### 9.39.1.1.4 Agency Women Count by Race

##### 9.39.1.1.4.1 Origin of Data Element

This value is the count of selected participants where Enroll-Part-WICStatus attribute of the Caseload-Count-Undup-Federal entity equals ‘B’, ‘N’ or ‘P’, is one of the minority codes and falls in the selected fiscal year.

##### 9.39.1.1.4.2 Format

This is a six-character value.

#### 9.39.1.1.5 Agency Infant/Child Count by Race

##### *9.39.1.1.5.1 Origin of Data Element*

This value is the count of selected participants where Enroll-Part-WICStatus attribute of the Caseload-Count-Undup-Federal entity equals 'I' or 'C', is one of the minority codes and falls in the selected fiscal year.

##### *9.39.1.1.5.2 Format*

This is a six-character value.

#### 9.39.1.1.6 Agency Total Count by Race

##### *9.39.1.1.6.1 Origin of Data Element*

This value is the count of selected participants where Enroll-Part-WICStatus attribute of the Caseload-Count-Undup-Federal entity equals 'I', 'C', 'B', 'N' or 'P', is one of the minority codes and falls in the selected fiscal year.

##### *9.39.1.1.6.2 Format*

This is a six-character value.

#### 9.39.1.1.7 State Women Count by Race

##### *9.39.1.1.7.1 Origin of Data Element*

This value is the count of selected participants where Enroll-Part-WICStatus attribute of the Caseload-Count-Undup-Federal entity equals 'B', 'N' or 'P', is one of the minority codes and falls in the selected fiscal year.

##### *9.39.1.1.7.2 Format*

This is a six-character value.

#### 9.39.1.1.8 State Infant/Child Count by Race

##### *9.39.1.1.8.1 Origin of Data Element*

This value is the count of selected participants where Enroll-Part-WICStatus attribute of the Caseload-Count-Undup-Federal entity equals 'I' or 'C', is one of the minority codes and falls in the selected fiscal year.

##### *9.39.1.1.8.2 Format*

This is a six-character value.

### 9.39.1.1.9 State Total Count by Race

#### 9.39.1.1.9.1 *Origin of Data Element*

This value is the count of selected participants where Enroll-Part-WICStatus attribute of the Caseload-Count-Undup-Federal entity equals 'I', 'C', 'B', 'N' or 'P', is one of the minority codes and falls in the selected fiscal year.

#### 9.39.1.1.9.2 *Format*

This is a six-character value.

### 9.39.1.2 *Filter Criteria*

#### 9.39.1.2.1 Base of Data

The Minority Health Disparity Survey report is a summary of records that fall within the Fiscal year selected from the Caseload-Count-Undup-Federal entity. Agency and State totals are accumulated for the various race codes.

### 9.39.1.3 *Sort Order*

#### 9.39.1.3.1 Agency

This report will be sorted by Agency-ID.

### 9.39.1.4 *Control Breaks*

This report will show totals by Agency.

### 9.39.1.5 *Grand Total*

State Totals will be printed.

### 9.39.1.6 *Frequency and Distribution*

This report can be generated on demand and will be generated yearly, from October through September, during the month-end process, if the report is selected by the state.

## 9.40 Generate Participation by Priority/Category/Ethnicity Group Report Dialog

When this report is selected, the system will display the Generate Participation by Priority/Category/Ethnic Group Report Dialog to select criteria for printing the Participation by Priority/Category/Ethnicity Group Report.

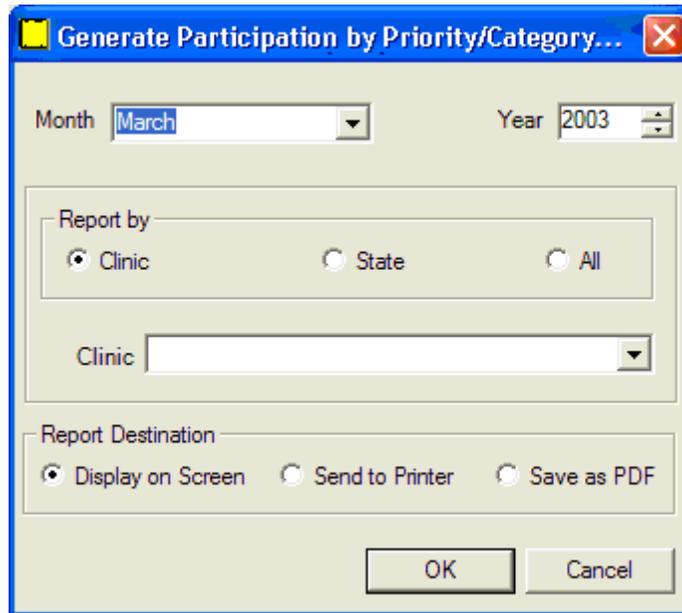


Figure 20 – Generate Participation by Priority/Category/Ethnicity Group Report Dialog

### 9.40.1 Controls

#### 9.40.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Participation by Priority/Category/Ethnicity Group Report Dialog is enabled. It will be filled with a list of months from the Reference\_Dictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.40.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Participation by Priority/Category/Ethnicity Group Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

#### ***9.40.1.3 Report By Radio Button***

This control allows the user to select a report break. The options are clinic break only, state grand total only or all. The control will be enabled when the Generate Participation by Priority/Category/Ethnicity Group Report Dialog is enabled. It will default to clinic.

#### ***9.40.1.4 Clinic Dropdown List***

This control allows the user to select a specific clinic. The control will be enabled when the Generate Participation by Priority/Category/Ethnicity Group Report Dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all clinics in the clinic entity. It will default to blank.

#### ***9.40.1.5 Report Destination Radio Button***

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Participation by Priority/Category/Ethnicity Group Report Dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

#### ***9.40.1.6 OK Button***

This control allows the user to print the report. The control will be enabled when the Generate Participation by Priority/Category/Ethnicity Group Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

#### ***9.40.1.7 Cancel Button***

This control allows the user to exit the Generate Participation by Priority/Category/Ethnicity Group Report Dialog. The control will be enabled when the Generate Participation by Priority/Category/Ethnicity Group Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### **9.40.2 Processes**

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Participation by Priority/Category/Ethnicity Group Report Dialog.

#### ***9.40.2.1 Initializing the Interface***

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Participation by Priority/Category/Ethnicity Group Report”
- The Month will default to the current month of the Process\_Control table.

- The Report by Agency radio button is initially selected.
- The Display on Screen radio button is initially selected.

#### 9.40.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Clinic radio button is selected and no selection has been made in the Clinic dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Participation by Priority/Category/Ethnicity Group Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Participation by Priority/Category/Ethnicity Group Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Participation by Priority/Category/Ethnicity Group Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Participation by Priority/Category/Ethnicity Group Report dialog and return the user to the Generate Reports dialog.

### 9.41 Participation by Priority/Category/Ethnicity Group Report (Output) CLD020

The user may generate the Participation by Priority/Category/Ethnicity Group Report from the Generate Participation by Priority/Category/Ethnicity Group Report Dialog.

The Participation by Priority/Category/Ethnicity Group is count of participants who were issued a food instrument within the selected reporting period.

The report is broken down by priority, WIC Category, and race/ethnicity code. The participants will be grouped under Indian, Hispanic, Black, White and Asian based upon their race/ethnicity code.

External ID	Description	Sort Value
101	American Indian or Alaskan Native; Hispanic or Latino	Indian
102	Asian; Hispanic or Latino	Asian
103	Black or African American; Hispanic or Latino	Black
104	Native Hawaiian or Other Pacific Islander; Hispanic or Latino	Hispanic
105	White; Hispanic or Latino	White
106	American Indian or Alaskan Native; White; Hispanic or Latino	Indian
107	Asian; White; Hispanic or Latino	Asian
108	Black or African American; White; Hispanic or Latino	Black
109	American Indian or Alaskan Native; Black or African American; Hispanic or Latino	Indian
110	American Indian or Alaskan Native; Asian; Hispanic or Latino	Indian
111	American Indian or Alaskan Native; Native Hawaiian or Other Pacific Islander; Hispanic or Latino	Indian
112	Asian; Black or African American; Hispanic or Latino	Asian

External ID	Description	Sort Value
113	Asian; Native Hawaiian or Other Pacific Islander; Hispanic or Latino	Asian
114	Black or African American; Native Hawaiian or Other Pacific Islander; Hispanic or Latino	Black
115	Native Hawaiian or Other Pacific Islander; White; Hispanic or Latino	White
116	American Indian or Alaskan Native; Asian; Black or African American; Hispanic or Latino	Indian
117	American Indian or Alaskan Native; Asian; Native Hawaiian or Other Pacific Islander; Hispanic or Latino	Indian
118	American Indian or Alaskan Native; Asian; White; Hispanic or Latino	Indian
119	American Indian or Alaskan Native; Black or African American; Native Hawaiian or Other Pacific Islander; Hispanic or Latino	Indian
120	American Indian or Alaskan Native; Black or African American; White; Hispanic or Latino	Indian
121	American Indian or Alaskan Native; Native Hawaiian or Other Pacific Islander; White; Hispanic or Latino	Indian
122	Asian; Black or African American; Native Hawaiian or Other Pacific Islander; Hispanic or Latino	Asian
123	Asian; Black or African American; White; Hispanic or Latino	Asian
124	Asian; Native Hawaiian or Other Pacific Islander; White; Hispanic or Latino	Asian
125	Black or African American; Native Hawaiian or Other Pacific Islander; White; Hispanic or Latino	Black

External ID	Description	Sort Value
126	American Indian or Alaskan Native; Asian; Black or African American; Native Hawaiian or Other Pacific Islander; Hispanic or Latino	Indian
127	American Indian or Alaskan Native; Asian; Black or African American; White; Hispanic or Latino	Indian
128	American Indian or Alaskan Native; Asian; Native Hawaiian or Other Pacific Islander; White; Hispanic or Latino	Indian
129	American Indian or Alaskan Native; Black or African American; Native Hawaiian or Other Pacific Islander; White; Hispanic or Latino	Indian
130	Asian; Black or African American; Native Hawaiian or Other Pacific Islander; White; Hispanic or Latino	Asian
131	American Indian or Alaskan Native; Asian; Black or African American; Native Hawaiian or Other Pacific Islander; White; Hispanic / Latino	Indian
201	American Indian or Alaskan Native; Not Hispanic or Latino	Indian
202	Asian; Not Hispanic or Latino	Asian
203	Black or African American; Not Hispanic or Latino	034
204	Native Hawaiian or Other Pacific Islander; Not Hispanic or Latino	White
205	White; Not Hispanic or Latino	White
206	American Indian or Alaskan Native; White; Not Hispanic or Latino	Indian
207	Asian; White; Not Hispanic or Latino	Asian
208	Black or African American; White; Not Hispanic or Latino	Black

External ID	Description	Sort Value
209	American Indian or Alaskan Native; Black or African American; Not Hispanic or Latino	Indian
210	American Indian or Alaskan Native; Asian; Not Hispanic or Latino	Indian
211	American Indian or Alaskan Native; Native Hawaiian or Other Pacific Islander; Not Hispanic or Latino	Indian
212	Asian; Black or African American; Not Hispanic or Latino	Asian
213	Asian; Native Hawaiian or Other Pacific Islander; Not Hispanic or Latino	Asian
214	Black or African American; Native Hawaiian or Other Pacific Islander; Not Hispanic or Latino	Black
215	Native Hawaiian or Other Pacific Islander; White; Not Hispanic or Latino	White
216	American Indian or Alaskan Native; Asian; Black or African American; Not Hispanic or Latino	Indian
217	American Indian or Alaskan Native; Asian; Native Hawaiian or Other Pacific Islander; Not Hispanic or Latino	Indian
218	American Indian or Alaskan Native; Asian; White; Not Hispanic or Latino	Indian
219	American Indian or Alaskan Native; Black or African American; Native Hawaiian or Other Pacific Islander; Not Hispanic or Latino	Indian
220	American Indian or Alaskan Native; Black or African American; White; Not Hispanic or Latino	Indian
221	American Indian or Alaskan Native; Native Hawaiian or Other Pacific Islander; White; Not Hispanic or Latino	Indian
222	Asian; Black or African American; Native Hawaiian or Other Pacific Islander; Not Hispanic or Latino	Asian

External ID	Description	Sort Value
223	Asian; Black or African American; White; Not Hispanic or Latino	Asian
224	Asian; Native Hawaiian or Other Pacific Islander; White; Not Hispanic or Latino	Asian
225	Black or African American; Native Hawaiian or Other Pacific Islander; White; Not Hispanic or Latino	Black
226	American Indian or Alaskan Native; Asian; Black or African American; Native Hawaiian or Other Pacific Islander; Not Hispanic or Latino	Indian
227	American Indian or Alaskan Native; Asian; Black or African American; White; Not Hispanic or Latino	Indian
228	American Indian or Alaskan Native; Asian; Native Hawaiian or Other Pacific Islander; White; Not Hispanic or Latino	Indian
229	American Indian or Alaskan Native; Black or African American; Native Hawaiian or Other Pacific Islander; White; Not Hispanic or Latino	Indian
230	Asian; Black or African American; Native Hawaiian or Other Pacific Islander; White; Not Hispanic or Latino	Asian
231	American Indian/Alaskan Native; Asian; Black/African American; Native Hawaiian/Other Pacific Islander; White; Not Hispanic/Latino	Indian
999	Unknown	Unknown

CLD020		<STATE NAME DEPARTMENT OF HEALTH> PARTICIPATION BY PRIORITY/CATEGORY/ETHNIC GROUP MONTH OF <MARCH 2004>						RUN DATE XX/XX/XXXX
								RUN TIME XX:XX:XX
								PAGE: XXX
<CLINIC OR STATE TOTAL>								
WIC CATEGORY	INDIAN	HISPANIC	BLACK	WHITE	ASIAN	UNKNOWN	TOTAL	
PRIORITY 1								
I	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	
C	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	
P	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	
B	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	
N	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	
UNK	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	
TOTAL 1	XXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXXX	
PRIORITY 2								
I	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	
C	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	
P	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	
B	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	
N	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	
TOTAL 2	XXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXXX	
PRIORITY UNKNOWN								
UNK	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	
C	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXXX	
TOTAL UNKNOWN	XXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXX	XXXXXXX	
TOTAL	XXXXXXX	XXXXXXX	XXXXXXX	XXXXXXX	XXXXXXX	XXXXXXX	XXXXXXX	
*** END OF LISTING ***								

### 9.41.1.1 Data Elements

#### 9.41.1.1.1 Month of

##### 9.41.1.1.1.1 Origin of Data Element

The user records this value when the report is submitted. During the month-end process this is the CCYYMM value from the Current\_Month\_End\_Dt attribute of the Process\_Control entity.

##### 9.41.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.41.1.1.2 Clinic or State Total

##### 9.41.1.1.2.1 Origin of Data Element

The selection criteria and information being reported determine this value.

- When reporting agency data, the Clinic code and description will be printed.
- When reporting state data, the text description of “State Total” will be printed.

##### 9.41.1.1.2.2 Format

This is a fifty-character text attribute. The format is determined by the information being reported.

#### 9.41.1.1.3 Priority

##### 9.41.1.1.3.1 Origin of Data Element

The information selected for reporting determines this value. If a participant’s priority value is unknown or is a value that is not valid for the WIC Category, the count is accumulated in the ‘UNKNOWN’ priority.

##### 9.41.1.1.3.2 Format

This is a one-character text attribute. The format is determined by the information being reported.

#### 9.41.1.1.4 WIC Category (WIC Category)

##### *9.41.1.1.4.1 Origin of Data Element*

The information selected for reporting determines this value. If a participant's priority value is unknown or is a value that is not valid for the WIC Category, the count is accumulated in the 'UNKNOWN' priority.

##### *9.41.1.1.4.2 Format*

This is a one-character text attribute. The format is determined by the information being reported.

#### 9.41.1.1.5 Indian Status Total (Monthly Count)

##### *9.41.1.1.5.1 Origin of Data Element*

This value is the total count of selected participants, grouped by the WICStatus and Priority attribute of the Caseload\_Count entity for the reported month where the race/ethnicity code qualifies as Indian.

##### *9.41.1.1.5.2 Format*

This value is a six-digit number.

#### 9.41.1.1.6 Hispanic Status Total (Monthly Count)

##### *9.41.1.1.6.1 Origin of Data Element*

This value is the total count of selected participants, grouped by the WICStatus and Priority attribute of the Caseload\_Count entity for the reported month where the race/ethnicity code qualifies as Hispanic.

##### *9.41.1.1.6.2 Format*

This value is a six-digit number.

#### 9.41.1.1.7 Black Status Total (Monthly Count)

##### *9.41.1.1.7.1 Origin of Data Element*

This value is the total count of selected participants, grouped by the WICStatus and Priority attribute of the Caseload\_Count entity for the reported month where the race/ethnicity code qualifies as Black.

##### *9.41.1.1.7.2 Format*

This value is a six-digit number.

#### 9.41.1.1.8 White Status Total (Monthly Count)

##### *9.41.1.1.8.1 Origin of Data Element*

This value is the total count of selected participants, grouped by the WICStatus and Priority attribute of the Caseload\_Count entity for the reported month where the race/ethnicity code qualifies as White.

##### *9.41.1.1.8.2 Format*

This value is a six-digit number.

#### 9.41.1.1.9 Asian Status Total (Monthly Count)

##### *9.41.1.1.9.1 Origin of Data Element*

This value is the total count of selected participants, grouped by the WICStatus and Priority attribute of the Caseload\_Count entity for the reported month where the race/ethnicity code qualifies as Asian.

##### *9.41.1.1.9.2 Format*

This value is a six-digit number.

#### 9.41.1.1.10 Category Total (Monthly Count)

##### *9.41.1.1.10.1 Origin of Data Element*

This value is the total count of selected participants, grouped by the WICStatus and Priority attribute of the Caseload\_Count entity for the reported month.

##### *9.41.1.1.10.2 Format*

This value is a six-digit number.

#### 9.41.1.1.11 Indian Status Priority Total (Monthly Count)

##### *9.41.1.1.11.1 Origin of Data Element*

This value is the count of participants for each priority where the race/ethnicity code qualifies as Indian.

##### *9.41.1.1.11.2 Format*

This value is a six-digit number.

#### 9.41.1.1.12 Hispanic Status Priority Total (Monthly Count)

##### *9.41.1.1.12.1 Origin of Data Element*

This value is the count of participants for each priority where the race/ethnicity code qualifies as Hispanic.

*9.41.1.1.12.2 Format*

This value is a six-digit number.

**9.41.1.1.13 Black Status Priority Total (Monthly Count)**

*9.41.1.1.13.1 Origin of Data Element*

This value is the count of participants for each priority where the race/ethnicity code qualifies as Black.

*9.41.1.1.13.2 Format*

This value is a six-digit number.

**9.41.1.1.14 White Status Priority Total (Monthly Count)**

*9.41.1.1.14.1 Origin of Data Element*

This value is the count of participants for each priority where the race/ethnicity code qualifies as White.

*9.41.1.1.14.2 Format*

This value is a six-digit number.

**9.41.1.1.15 Asian Status Priority Total (Monthly Count)**

*9.41.1.1.15.1 Origin of Data Element*

This value is the count of participants for each priority where the race/ethnicity code qualifies as Asian.

*9.41.1.1.15.2 Format*

This value is a six-digit number.

**9.41.1.1.16 Priority Total (Monthly Count)**

*9.41.1.1.16.1 Origin of Data Element*

This value is the total count of selected participants, grouped by the Priority attributes of the Caseload\_Count entity for the reported month.

*9.41.1.1.16.2 Format*

This value is a six-digit number.

**9.41.1.1.17 Total Summary Indian (Monthly Count)**

*9.41.1.1.17.1 Origin of Data Element*

This value is the total count of selected participants where the race/ethnicity code qualifies as Indian for the reported month.

*9.41.1.1.17.2 Format*

This value is a six-digit number.

**9.41.1.1.18 Total Summary Hispanic (Monthly Count)**

*9.41.1.1.18.1 Origin of Data Element*

This value is the total count of selected participants where the race/ethnicity code qualifies as Hispanic for the reported month.

*9.41.1.1.18.2 Format*

This value is a six-digit number.

**9.41.1.1.19 Total Summary Black (Monthly Count)**

*9.41.1.1.19.1 Origin of Data Element*

This value is the total count of selected participants where the race/ethnicity code qualifies as Black for the reported month.

*9.41.1.1.19.2 Format*

This value is a six-digit number.

**9.41.1.1.20 Total Summary White (Monthly Count)**

*9.41.1.1.20.1 Origin of Data Element*

This value is the total count of selected participants where the race/ethnicity code qualifies as White for the reported month.

*9.41.1.1.20.2 Format*

This value is a six-digit number.

**9.41.1.1.21 Total Summary Asian (Monthly Count)**

*9.41.1.1.21.1 Origin of Data Element*

This value is the total count of selected participants where the race/ethnicity code qualifies as Asian for the reported month.

*9.41.1.1.21.2 Format*

This value is a six-digit number.

**9.41.1.1.22 Total (Monthly Count)**

*9.41.1.1.22.1 Origin of Data Element*

This value is the total count of selected participants for the reported month.

#### 9.41.1.1.22.2 *Format*

This value is a six-digit number.

### 9.41.1.2 *Filter Criteria*

#### 9.41.1.2.1 Base of Data

All participants that received a WIC food instrument with a first date to use in the month are included in the counts for the reported months. Each participant is counted in the totals for one clinic, priority, category and ethnic group.

#### 9.41.1.2.2 Clinic, State, All

If an individual clinic is selected, summary data for that clinic will be included. If all clinics are selected, summary data for all clinics will be included. If the state is selected, summary data for the state level will be included. If all is selected, data for all clinics and state will be selected in the following sequence.

- Clinic 01 summary
- Clinic 02 summary
- State summary

### 9.41.1.3 *Sort Order*

#### 9.41.1.3.1 Clinic / State Total

This report will be sorted by clinic code and state totals, depending on selection criteria of the report.

- If the state total is selected, this part of the sort order does not apply.
- If all is selected, the report will be sorted by clinic code.

#### 9.41.1.3.2 Priority

The report will be sorted by priority code within clinic/state.

#### 9.41.1.3.3 WIC Category

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

#### 9.41.1.3.4 Race/Ethnicity Code

The report will be sorted by race/ethnicity code within WIC Category.

### 9.41.1.4 *Control Breaks*

#### 9.41.1.4.1 Clinic

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

#### *9.41.1.5 Grand Total*

The total number of Participation by Priority/Category/Ethnicity Group for all clinics will be printed as state totals when the state or all option is selected.

#### *9.41.1.6 Frequency and Distribution*

This report can be generated on demand and will be generated during the month-end process, if the report is selected by the state.

## 9.42 Generate Staff Activity Report Dialog

When this report is selected, the system will display the Generate Staff Activity Report dialog to select criteria for printing the Generate Staff Activity Report.

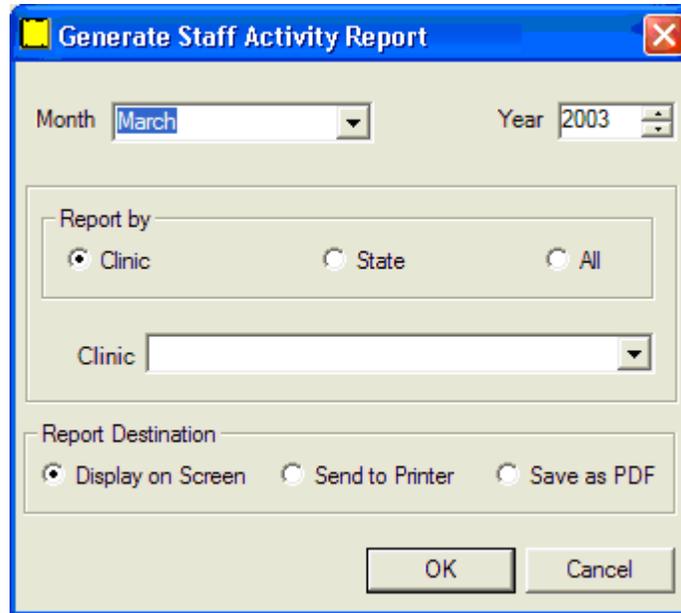


Figure 21 – Generate Staff Activity Report Dialog

### 9.42.1 Controls

#### 9.42.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate Staff Activity Report dialog is enabled. It will be filled with a list of months from the Reference\_Dictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.42.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate Staff Activity Report dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to the current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

#### 9.42.1.3 Report By Radio Button

This control allows the user to select a report break. The options are clinic break only, state grand total only or all. The control will be enabled when the Generate Staff Activity Report dialog is enabled. It will default to clinic.

#### 9.42.1.4 Clinic Dropdown List

This control allows the user to select a specific clinic. The control will be enabled when the Generate Staff Activity Report dialog is enabled. It will be disabled if the Report By value of All or State is selected. It will be filled with all clinics in the clinic entity. It will default to blank.

#### 9.42.1.5 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled and will default to Display on Screen when the Generate Staff Activity Report dialog is enabled. If the Report by All radio button is selected, the system will default to Send to Printer.

#### 9.42.1.6 OK Button

This control allows the user to print the report. The control will be enabled when the Generate Staff Activity Report dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

#### 9.42.1.7 Cancel Button

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

### 9.42.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate Staff Activity Report dialog.

#### 9.42.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate Staff Activity Report”
- The Month will default to the current month of the Process\_Control table.
- The Report by Agency radio button is initially selected.
- The Display on Screen radio button is initially selected.

#### 9.42.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month dropdown
  - Year Masked Edit Box and Spin Control

the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Clinic radio button is selected and no selection has been made in the Clinic dropdown, the system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”
- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate Staff Activity Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate Staff Activity Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate Staff Activity Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate Staff Activity Report dialog and return the user to the Generate Reports dialog.

### **9.43 Staff Activity Report (Output) CLD021**

The user may generate the Staff Activity from the Generate Staff Activity Report dialog.

The Staff Activity is a summary of Clinic Staff activity for the selected month.

The report will show totals for the Clinic and at the end of the report totals for the State.

A task row is added to the StaffTask entity each time a clinic staff member performs a task. The tasks are recorded with statistical information identifying the staff member, task type, clinic, date and time.

Totals counts are printed for each staff member and clinic.

```

CLD021 <STATE NAME DEPARTMENT OF HEALTH> RUN DATE: XX/XX/XXXX
STAFF ACTIVITY RUN TIME XX:XX:XX
MONTH OF <MARCH 2004> PAGE: XXX

CLINIC: XX-XXXXXXXXXXXXXXXXXXXXXXXXXXXX

  APPT      DEMO      INCOME      HT/WT      HEALTH      DIET      FOOD      NUT ED      REF      CERTS      CHECKS
  SCHED     UPDATE     RECORD     BLOOD     INFO        INTAKE    RX        RECORD     CONT     DONE     ISSUED    TOTAL
-----
STAFF MEMBER: ADAMSON, MARY L.
  XX,XXX    XXX,XXX    X,XXX,XXX
STAFF MEMBER: BREEDLOVE, JOAN N.
  XX,XXX    XXX,XXX    X,XXX,XXX
CLINIC TOTALS
X,XXX,XXX XX,XXX,XXX XX,XXX,XXX
STATE TOTALS
X,XXX,XXX XX,XXX,XXX XXX,XXX,XXX

*** END OF LISTING ***
  
```

### 9.43.1.1 Data Elements

#### 9.43.1.1.1 Month of

##### 9.43.1.1.1.1 Origin of Data Element

The user selects this value on the [Generate Staff Activity Report Dialog](#) when the report is submitted on demand.

##### 9.43.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.43.1.1.2 Clinic

##### 9.43.1.1.2.1 Origin of Data Element

This value comes from the ServiceSiteID and Name attributes of the SERVICE-SITE entity.

##### 9.43.1.1.2.2 Format

The values will print as their literal values.

#### 9.43.1.1.3 Staff Member

##### 9.43.1.1.3.1 Origin of Data Element

This value comes from StaffTask entity.

##### 9.43.1.1.3.2 Format

The value will print as its literal value.

#### 9.43.1.1.4 Appointments/Group Classes (Appt Sched)

##### 9.43.1.1.4.1 Origin of Data Element

This value is the number of times the staff member scheduled an appointment, rescheduled an appointment or enrolled a participant in a group class during the selected month. The value is the number of records on the StaffTask table where the TaskDate attribute is equal to the reported month and the TaskType is appointment scheduled, appointment rescheduled or group class enrollment.

##### 9.43.1.1.4.2 Format

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

#### 9.43.1.1.5 Demographics (Demo Update)

##### *9.43.1.1.5.1 Origin of Data Element*

This value is the number of times the staff member updated demographic information for a participant during the selected month. The value is the number of records on the StaffTask table where the TaskDate attribute is equal to the reported month and the TaskType is demographics update.

##### *9.43.1.1.5.2 Format*

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

#### 9.43.1.1.6 Income Recorded (Income Record)

##### *9.43.1.1.6.1 Origin of Data Element*

This value is the number of times the staff member recorded or updated income information for a participant during the selected month. The value is the number of records on the StaffTask table where the TaskDate attribute is equal to the reported month and the TaskType is income update.

##### *9.43.1.1.6.2 Format*

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

#### 9.43.1.1.7 Height/Weight/Blood (Ht/Wt Blood)

##### *9.43.1.1.7.1 Origin of Data Element*

This value is the number of times the staff member added or updated height, weight or blood work information for a participant during the selected month. The value is the number of records on the StaffTask table where the TaskDate attribute is equal to the reported month and the TaskType is height update, weight update or blood work update.

##### *9.43.1.1.7.2 Format*

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

#### 9.43.1.1.8 Health Information (Health Info)

##### *9.43.1.1.8.1 Origin of Data Element*

This value is the number of times the staff member recorded or updated health information for a participant during the selected month. The value is the number of records on the StaffTask table where the TaskDate attribute is equal to the reported month and the TaskType is health information update.

#### *9.43.1.1.8.2 Format*

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

#### 9.43.1.1.9 Diet Intake

##### *9.43.1.1.9.1 Origin of Data Element*

This value is the number of times the staff member recorded diet intake information for a participant during the selected month. The value is the number of records on the StaffTask table where the TaskDate attribute is equal to the reported month and the TaskType is diet intake recorded.

##### *9.43.1.1.9.2 Format*

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

#### 9.43.1.1.10 Food Prescription (Food RX)

##### *9.43.1.1.10.1 Origin of Data Element*

This value is the number of times the staff member recorded or updated food prescription information for a participant during the selected month. The value is the number of records on the StaffTask table where the TaskDate attribute is equal to the reported month and the TaskType is food prescription update.

##### *9.43.1.1.10.2 Format*

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

#### 9.43.1.1.11 Nutrition Education (Nut Ed Record)

##### *9.43.1.1.11.1 Origin of Data Element*

This value is the number of times the staff member recorded a nutrition education contact for a participant during the selected month. This includes individual education contacts and group education contacts. The value is the number of records on the StaffTask table where the TaskDate attribute is equal to the reported month and the TaskType is nutrition education contact.

##### *9.43.1.1.11.2 Format*

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

#### 9.43.1.1.12 Referral Contact (Ref Cont)

##### *9.43.1.1.12.1 Origin of Data Element*

This value is the number of times the staff member recorded a referral contact for a participant during the selected month. The value is the number of records on the StaffTask table where the TaskDate attribute is equal to the reported month and the TaskType is referral contact.

##### *9.43.1.1.12.2 Format*

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

#### 9.43.1.1.13 Certifications Completed (Certs Done)

##### *9.43.1.1.13.1 Origin of Data Element*

This value is the number of times the staff member certified a participant during the selected month. This includes initial certifications and subsequent certifications. The value is the number of records on the StaffTask table where the TaskDate attribute is equal to the reported month and the TaskType is initial certification or subsequent certification.

##### *9.43.1.1.13.2 Format*

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

#### 9.43.1.1.14 Checks Issued

##### *9.43.1.1.14.1 Origin of Data Element*

This value is the total number of checks the staff member issued to participants during the selected month. The value is the total count of records in the Food\_Instrument\_Set and Food\_Instrument entities where the Issued\_Date attribute on the Food\_Instrument\_Set is equal to the reported month and the check was issued by the staff member.

##### *9.43.1.1.14.2 Format*

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

#### 9.43.1.1.15 Staff Member Total

##### *9.43.1.1.15.1 Origin of Data Element*

This value is the sum total of all the listed tasks that were performed by the staff member during the selected month.

##### *9.43.1.1.15.2 Format*

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

### ***9.43.1.2 Filter Criteria***

#### **9.43.1.2.1 Base of Data**

The Staff Activity report is a summary of clinic staff activity during the selected month. Clinic and State totals are accumulated.

### ***9.43.1.3 Sort Order***

#### **9.43.1.3.1 Clinic**

This report will be sorted by Clinic-ID.

#### **9.43.1.3.2 Staff Member**

This report will be sorted by Staff Member within Clinic-ID.

### ***9.43.1.4 Control Breaks***

#### **9.43.1.4.1 Clinic**

A page break will occur on change in clinic. Totals for the clinic will be printed.

### ***9.43.1.5 Grand Total***

State totals will be printed when the state or all option is selected.

### ***9.43.1.6 Frequency and Distribution***

This report can be generated on demand.

## 9.44 Generate WIC Reported Participation (per FNS-798) Report Dialog

When this report is selected, the system will display the Generate WIC Reported Participation (per FNS-798) Report Dialog to select criteria for printing the WIC Reported Participation (per FNS-798) Report.

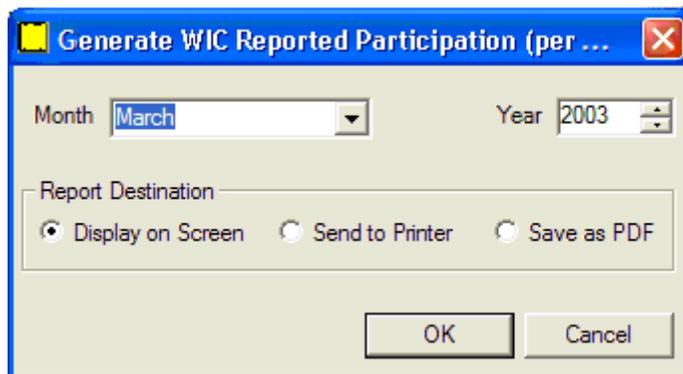


Figure 22 – Generate WIC Reported Participation (per FNS-798) Report Dialog

### 9.44.1 Controls

#### 9.44.1.1 Month Dropdown

This control allows the user to select report month. The control will be enabled when the Generate WIC Reported Participation (per FNS-798) Report Dialog is enabled. It will be filled with a list of months from the ReferenceDictionary entity, displayed in calendar month order within the list. It will default to the current month of the Process\_Control entity.

#### 9.44.1.2 Year Masked Edit Box and Spin Control

This control allows the user to specify the year associated with the month that is to be reported. The masked edit box and spin control will be enabled when the Generate WIC Reported Participation (per FNS-798) Report Dialog is enabled. The masked edit box will only allow the entry of numeric digits. The maximum size of the control will be four (4) characters. The masked edit box will default to current year of the Process\_Control entity. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

#### 9.44.1.3 Report Destination Radio Button

This control allows the user to select either Display on Screen, Send to Printer or Save as PDF. The control will be enabled when the Generate WIC Reported Participation (per FNS-798) Report Dialog is enabled. It will default to Display on Screen.

#### 9.44.1.4 OK Button

This control allows the user to print the report. The control will be enabled when the Generate WIC Reported Participation (per FNS-798) Report Dialog is enabled (See Saving the Data in the Processing section below). Characteristics for the OK button are defined in *Consistencies*.

#### 9.44.1.5 Cancel Button

This control allows the user to exit the Generate WIC Reported Participation (per FNS-798) Report Dialog. The control will be enabled when the Generate WIC Reported Participation (per FNS-798) Report Dialog is active. Characteristics for the Cancel button are defined in *Consistencies*.

### 9.44.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Generate WIC Reported Participation (per FNS-798) Report Dialog.

#### 9.44.2.1 Initializing the Interface

Upon the initial display of the dialog:

- The title bar text will be set to “Generate WIC Reported Participation (per FNS-798) Report”
- The Month will default to the current month of the Process\_Control table.
- The Display on Screen radio button is initially selected.

#### 9.44.2.2 Edits

Upon selection of the OK button:

- If no selection has been made in the following control
  - Month Dropdown
  - Year Masked Edit Box and Spin Controlthe system will display a standard error message with the text “A selection is required in the <control label>.”
- If the Year selected is greater than the current system year, the system will display a standard error message with the text “The Year must be less than or equal to the current year.”
- If the Send to Printer radio button is selected and a printer has not been selected for the workstation, the system will display a standard error message box with the text “No printer has been specified for this workstation.”

- If the Send to Printer radio button is selected and a printer has been selected for the workstation, the system will send the output to the selected printer. The Generate WIC Reported Participation (per FNS-798) Report dialog is dismissed and returns the user to the Generate Reports dialog.
- If the Display on Screen radio button is selected the system will dismiss the Generate WIC Reported Participation (per FNS-798) Report dialog and invoke the standard print preview window to allow the user to view the report output.
- If the Save as PDF radio button is selected the system will dismiss the Generate WIC Reported Participation (per FNS-798) Report dialog and invoke a standard windows save as dialog to allow the user to select the destination of the PDF file output.

Upon selection of the Cancel button:

- The system will dismiss the Generate WIC Reported Participation (per FNS-798) Report dialog and return the user to the Generate Reports dialog.

#### **9.45 WIC Reported Participation (per FNS-798) Report (Output) CLD022**

The user may generate the WIC Reported Participation (per FNS-798) Report from the Generate WIC Reported Participation (per FNS-798) Report dialog.

The FNS 798 WIC annual reported participation report is a count of the number of participants that have been issued at least one WIC food instrument for the reported month. Totals are accumulated for the Federal fiscal year beginning in October.

A summary page will also print with the monthly counts for each WIC Category, migrant totals, and estimated eligible totals.

The participation counts are broken down by category for each month reported.

A total for all women (pregnant, non-breastfeeding, and breastfeeding) will be accumulated on the report.

Total migrant participation is a count of the number of reported participants flagged as migrant at the time of the month-end processing.

Only state totals are printed. The issue month will be indicated with ISSD under the month name. The 30 day status month will be indicated with 30DY under the month name. When closeout for a month has been reached, C/O will print under the month name.

CLD022 <STATE NAME DEPARTMENT OF HEALTH> RUN DATE XX/XX/XXXX													
WIC REPORTED PARTICIPATION (PER FNS-798) RUN TIME XX:XX:XX													
MONTH OF <JUNE 2003> PAGE: XXX													
	OCT 04	NOV 04	DEC 04	JAN 04	FEB 04	MAR 04	APR 04	MAY 04	JUN 04	JUL 04	AUG 04	SEP 04	AVG
	C/O	30DY	ISSD	C/O									
WOMEN - B	XXX,XXX												
WOMEN - N	XXX,XXX												
WOMEN - P	XXX,XXX												
WOMEN - TOTAL	XXX,XXX												
INFANTS - TOTAL	XXX,XXX												
CHILDREN - TOTAL	XXX,XXX												
TOTAL	XXX,XXX												
MIGRANT - TOTAL	XXX,XXX												
*** END OF LISTING ***													

### 9.45.1.1 Data Elements

The reported participation totals are a monthly-unduplicated count of participants who were issued at least one WIC food instrument. A value of 'Y' in the Rpted\_This\_Month attribute of the Caseload\_Count entity indicates that the participant has received a food instrument for the reported month. Values on this report will match the Number of Participants Issued Food Instruments report. A value of '0' in the Program\_Code attribute of the Caseload\_Count entity indicates data for the WIC program.

#### 9.45.1.1.1 Month of

##### 9.45.1.1.1.1 Origin of Data Element

This is the month and year that was selected on the [Generate WIC Reported Participation \(per FNS-798\) Report Dialog](#).

##### 9.45.1.1.1.2 Format

This is an accounting month and year formatted as Month Name CCYY.

#### 9.45.1.1.2 Monthly Totals - Count

The following is a description of the counts for all priorities within each category for the months of October through September. The category totals are an accumulation of the priority totals.

##### 9.45.1.1.2.1 Origin of Data Element

This attribute is calculated by totaling the number of participants that were issued at least one WIC food instrument with the first date to use for the reported month. The participant is counted once per month.

##### 9.45.1.1.2.2 Format

This value is an eight-digit number.

#### 9.45.1.1.3 C/O Avg.

##### 9.45.1.1.3.1 Origin of Data Element

This attribute is calculated by totaling the values in the row for closeout months and dividing the accumulated total by the number of closeout months included. This calculation is performed for every line item on the report.

##### 9.45.1.1.3.2 Format

This value is a six-digit number.

#### 9.45.1.1.4 Migrant Total

This attribute is calculated by totaling the number of participants from migrant households that were issued at least one WIC food instrument for the reported month. The migrant participant is counted once per month. A migrant household has a value of 'Y' in the Migrant attribute of the Household entity at the time the month-end process is performed.

##### *9.45.1.1.4.1 Origin of Data Element*

This value is the number of participants for the reported month that have value of 'Y' in the Rpted\_This\_Month attribute of the Caseload\_Count entity, a value of '0' in the Program\_Code attribute of the Caseload\_Count entity, and a value of 'Y' in the Migrant attribute of the Caseload\_Count\_Enrollment entity.

##### *9.45.1.1.4.2 Format*

This value is a six-digit number.

#### 9.45.1.2 Filter Criteria

##### 9.45.1.2.1 Participants

All participants that receive a WIC food instrument with a first date to use in the month are included in the counts for the reported months. Each participant is counted in the totals for one agency and category.

#### 9.45.1.3 Sort Order

No sort order has been defined for this report.

#### 9.45.1.4 Control Breaks

No control breaks have been defined for this report.

#### 9.45.1.5 Grand Total

No grand totals have been defined for this report.

#### 9.45.1.6 Frequency and Distribution

This report can be generated on demand.