

2. WAITING LIST 2

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2. Waiting List

Applicants that cannot be serviced by the WIC agency due to lack of funding are placed on the waiting list for WIC services. The Service Site application automates the process of managing the waiting list, recording communications with the applicants on the waiting list, and produce waiting list notifications. (This function may not be applicable for your state.)

2.1 Add Applicant to Waiting List (Prescreening)

The Add Applicant to Waiting List (Prescreening) Dialog allows the user to view the priority for an applicant and acknowledge that the prescreening information is correct before adding the applicant to the waiting list. It also allows the user to continue with the prescreening process without adding the applicant to the waiting list. It is invoked when the user selects the OK button from the [Applicant Prescreening Dialog](#) described in *Clinic Chapter 07 - Initial Contact* and the applicant has a priority that is not currently being served.

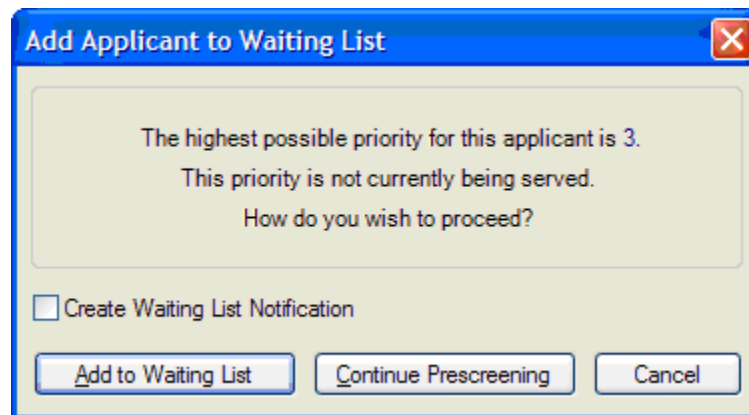


Figure 1 - Add Applicant to Waiting List Dialog

2.1.1 Controls

This section describes the behavior of the controls on the Add Applicant to Waiting List Dialog.

2.1.1.1 Applicant Priority Text Label and Value

This text label and value label allows the user to view the priority for the applicant. The value label will be set to the value of the priority for the applicant. It will display in the color blue.

2.1.1.2 Create Waiting List Notification Check Box

This control allows the user to create a waiting list notification document when the applicant is added to the waiting list. The check box will be enabled when the Add Applicant to Waiting List dialog is active. It has an initial value of cleared.

2.1.1.3 Add to Waiting List Button

This control allows the user to confirm that the applicant information is correct and add the applicant to the waiting list. The Add to Waiting List button will be enabled when the Add Applicant to Waiting List Dialog is active. It will have a mnemonic of "A."

2.1.1.4 Continue Prescreening Button

This control allows the user to confirm that the applicant information is correct and continue without adding the applicant to the waiting list. The Continue Prescreening button will be enabled when the Add Applicant to Waiting List Dialog is active. It will have a mnemonic of "C."

2.1.1.5 Cancel Button

This control allows the user to exit the Dialog without applying any changes and return to the Applicant Prescreening Dialog. The Cancel button will be enabled when the Add Applicant to Waiting List Dialog is active. It does not have a mnemonic and is the cancel button for the Dialog.

2.1.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Add Applicant to Waiting List Dialog.

2.1.2.1 Edits

There are no updateable controls on the Add Applicant to Waiting List Dialog; therefore, there are no edits performed on this dialog.

2.1.2.2 Add Applicant to Waiting List

When the user selects the Add to Waiting List button, the system will create an entry in the WAITING-LIST-MEMBER entity for the applicant and proceed with the Applicant Prescreening process. Where the system returns to the Applicant Prescreening process depends on what action caused the Add Applicant to Waiting List Dialog to display:

- If the Schedule Appointment check box was selected the system proceeds to the [Schedule Appointment s for Household](#) dialog described in *Chapter 08 – Appointment Scheduling*.
- If the Schedule Appointment check box was not selected the system will return the user to the appropriate action selected in the On Completion radio button group described for the [Applicant Prescreening Dialog](#) described in *Chapter 07 - Initial Contact*.

2.1.2.3 Create Waiting List Notification

When the user selects the Add to Waiting List button and the Create Waiting List Notification check box has been selected, the system will produce for the applicant a Waiting List Notice defined in [System Outputs Chapter 01 – System Outputs](#).

2.1.2.4 Continue Prescreening

When the user selects the Continue Prescreening button the system will continue with the Applicant Prescreening process. The applicant will not be added to the waiting list. Where the system returns to the Applicant Prescreening process depends on the status of Applicant Prescreening Dialog when the OK button was selected and caused the Add Applicant to Waiting List Dialog to display:

- If the Schedule Appointment check box was selected the system proceeds to the [Schedule Appointment s for Household](#) dialog described in *Chapter 08 – Appointment Scheduling*.
- If the Schedule Appointment check box was not selected the system will return the user to the appropriate action selected in the On Completion radio button group described for the [Applicant Prescreening Dialog](#) described in *Chapter 07 - Initial Contact*.

2.2 Add Applicant to Waiting List (Certification Guided Script)

The Add Applicant to Waiting List (Certification Guided Script) Dialog allows the user to view the priority for an applicant and place the applicant on the waiting list. It also allows the user to continue with the certification process without adding the applicant to the waiting list. It is invoked during the [End Certification process](#) described in *Chapter 10 – Certification Guided Script* when the applicant has a priority that is not currently being served.

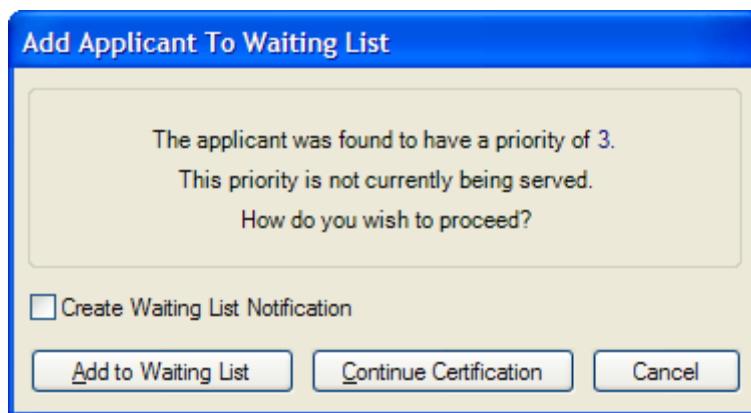


Figure 2 - Add Applicant to Waiting List Dialog

2.2.1 Controls

This section describes the behavior of the controls on the Add Applicant to Waiting List Dialog.

2.2.1.1 Applicant Priority Text Label and Value

This text label and value label allows the user to view the priority for the applicant. The value label will be set to the value of the priority for the applicant. It will display in the color blue.

2.2.1.2 Create Waiting List Notification Check Box

This control allows the user to create a waiting list notification document when the applicant is added to the waiting list. The check box will be enabled when the Add Applicant to Waiting List Dialog is active. It has an initial value of cleared.

2.2.1.3 Add to Waiting List Button

This control allows the user to confirm that the Guided Script information is correct and add the applicant to the waiting list. The Add to Waiting List button will be enabled when the Add Applicant to Waiting List Dialog is active. It will have a mnemonic of “A.”

2.2.1.4 Continue Certification Button

This control allows the user to confirm that the Guided Script information is correct and continue through the certification process without adding the applicant to the waiting list. The Continue Certification button will be enabled when the Add Applicant to Waiting List Dialog is active. It will have a mnemonic of "C."

2.2.1.5 Cancel Button

This control allows the user to exit the Add Applicant to Waiting List Dialog and return to the Guided Script. The Cancel button will be enabled when the Add Applicant to Waiting List Dialog is active. It does not have a mnemonic and is the cancel button for the Dialog.

2.2.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Add Applicant to Waiting List Dialog.

2.2.2.1 Edits

There are no updateable controls on the Add Applicant to Waiting List Dialog; therefore, there are no edits performed on this dialog.

2.2.2.2 Add Applicant to Waiting List

When the user selects the Add to Waiting List button, the system will create an entry in the WAITINGLIST entity for the applicant and proceed with the [End Certification process](#) described in *Chapter 10 – Certification Guided Script*.

2.2.2.3 Create Waiting List Notification

When the user selects the Add to Waiting List button and the Create Waiting List Notification check box has been selected, the system will produce for the applicant a Waiting List Notice defined in [System Outputs Chapter 01 – System Outputs](#).

2.2.2.4 Continue Certification

When the user selects the Continue Certification button, the system will proceed with the End Certification process without placing the applicant on the waiting list. The system will continue with the Guided Script from the point where the Add Applicant to Waiting List Dialog was displayed.

2.2.2.5 Return to Guided Script

When the user selects the Cancel button, the system will stop the End Certification process without placing the applicant on the waiting list. The system will return to the Guided Script at the point where the End Certification Process button was selected.

2.3 Manage Waiting List

The Manage Waiting List Dialog allows the user to manage the applicants who are on the waiting list. It is invoked in response to the following user actions:

- Selection of the Waiting List menu item from the File menu described in *Clinic Chapter 06 - Search-Selection*
- Selection of the Waiting List toolbar button from the system toolbar described in *Clinic Chapter 06 - Search-Selection*.

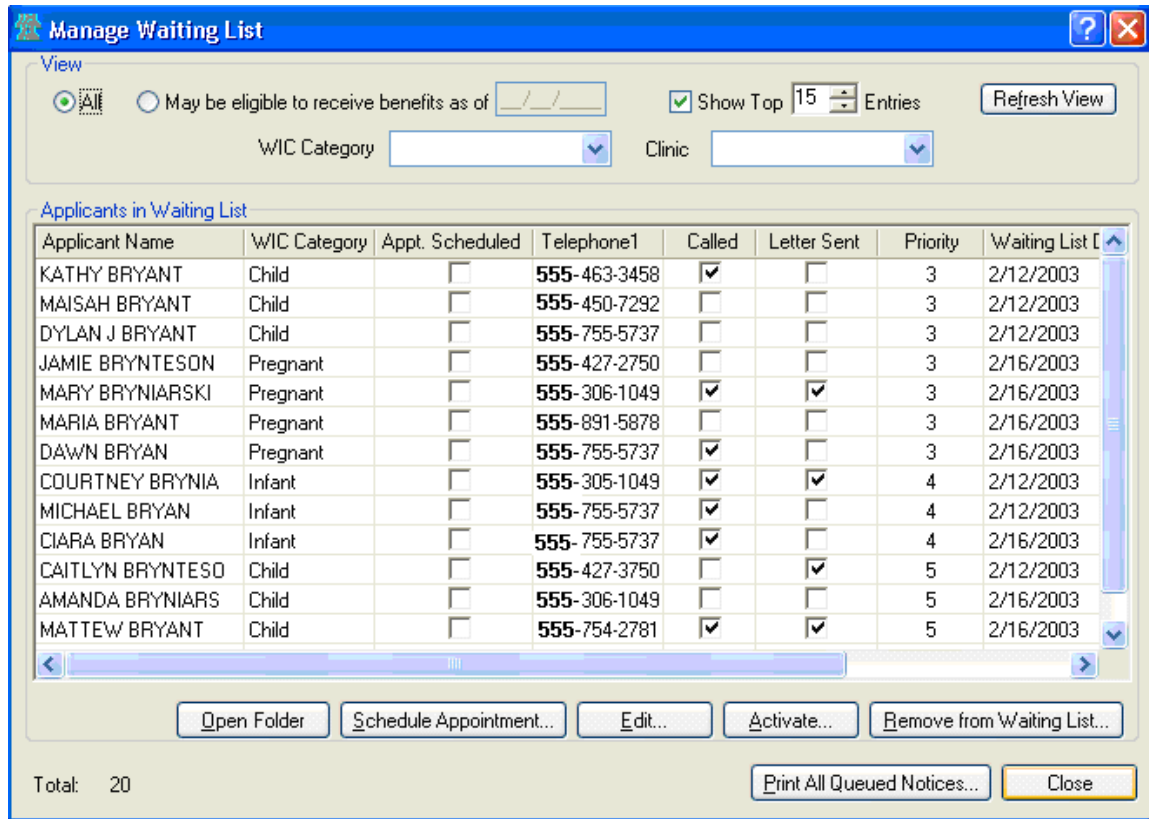


Figure 3 - Manage Waiting List Dialog

2.3.1 Controls

This section describes the behavior of the controls on the Manage Waiting List Dialog.

2.3.1.1 View Radio Button Group

This control allows the user to specify whether the Waiting List display grid shows entries for all wait-listed applicants or for applicants meeting the view criteria. The radio button group will be enabled when the Manage Waiting List Dialog is active. It consists of the following radio buttons:

- All
- May be eligible to receive benefits as of

The All radio button will be the default selection.

Upon a change in the selected radio button, the Refresh View button will be enabled. Upon deselecting the May be eligible to receive benefits as of radio button, the Receive Benefits as of masked edit box will be blanked and disabled.

2.3.1.2 Receive Benefits as of Masked Edit Box (May be Eligible to Receive Benefits as of)

This control allows the user to specify the date on which to filter the view of the Waiting List display grid entries. The masked edit box will be enabled when the May be eligible to receive benefits as of radio button is selected. The mask on the box will be “###/###/####” to accept a date with a four digit year. The masked edit box will initially be blank.

The string entered must represent a valid date in the format of MM/DD/CCYY. If an invalid date is entered, the system will invoke a standard error message with the text of “Invalid date entered.”

2.3.1.3 Show Top Entries Check Box

This control allows the user to indicate that the view of the Waiting List display grid entries should be limited to a select number of entries starting from the top of the view. The check box will be enabled when the Manage Waiting List Dialog is active. It has an initial value of cleared.

Upon a change in the value of the check box, the Refresh View button will be enabled. Upon removing the mark from the Show Top Entries check box, the Show Top Entries masked edit box will be disabled.

2.3.1.4 Show Top Entries Masked Edit Box and Spin Control

This control allows the user to indicate the number of entries to include in the Waiting List display grid starting from the top of the view. The masked edit box will be enabled when the Show Top Entries check box is marked. The masked edit box will only allow the entry of numeric digits. The mask of this box will be “##”. The value will default to the total number of entries in the Waiting List display grid. Selection of the increment or decrement buttons of the spin control will increase or decrease the value by one (1).

2.3.1.5 Refresh View Button

This control allows the user to apply the selected view criteria to the entries in the Waiting List display grid. The Refresh View button will be disabled when the Manage Waiting List Dialog is active. The button has a mnemonic of “F.”

2.3.1.6 WIC Category Dropdown

This control allows the user to indicate the WIC Category of the wait-listed applicants to include in the Waiting List display grid. The WIC Category dropdown will be enabled when the Manage Waiting List Dialog is active. It will display a list of WIC Categories from the WICStatus entity.

2.3.1.7 Clinic Dropdown

This control allows the user to indicate the clinic of the wait-listed applicants to include in the Waiting List display grid. The Clinic dropdown will be enabled when the Manage Waiting List Dialog is active. It will contain all Clinics assigned to the agency.

2.3.1.8 Waiting List Display Grid

This control allows the user to view the waiting list entries that correspond to the selected view criteria. The grid will consist of the following columns:

- Applicant Name
- WIC Category
- Appointment Scheduled flag (Appt. Scheduled)
- Telephone 1
- Called flag
- Letter Sent flag
- Priority
- Waiting List Date
- Application Date

The entries in the grid will be sorted by the Priority column. Within Priority the entries will be sorted by the Waiting List Date column. Only those entries that correspond to the selected view criteria will display in the grid. The display grid will initially be filled with entries for all applicants on the waiting list. The values on the grid are read-only.

2.3.1.9 Open Folder Button

This control allows the user to open the Participant Folder for the applicant selected in the Waiting List display grid. The Schedule Appointment button will be enabled when a record is selected on the Waiting List display grid. The button has a mnemonic of "O".

2.3.1.10 Schedule Appointment Button

This control allows the user to schedule an appointment for the applicant selected in the Waiting List display grid. The Schedule Appointment button will be enabled when a record is selected on the Waiting List display grid. The button has a mnemonic of "S".

2.3.1.11 Edit Button

This control allows the user to edit the information for the applicant selected in the Waiting List display grid. The Edit button will be enabled when a record is selected on the Waiting List display grid. The button has a mnemonic of “E”.

2.3.1.12 Activate Applicant Button

This control allows the user to change the status of the applicant selected in the Waiting List display grid to make them active and available for benefits. The Activate Applicant button will be enabled when a record is selected on the Waiting List display grid. The button has a mnemonic of “A”.

2.3.1.13 Remove from Waiting List Button

This control allows the user to remove the applicant selected in the Waiting List display grid from the waiting list. The Remove from Waiting List button will be enabled when a record is selected on the Waiting List display grid. The button has a mnemonic of “R”.

2.3.1.14 Total Text and Value Label

The value label will display the total number of waitlisted applicants currently displayed in the Waiting List display grid. It will display in the inverse color of the form.

2.3.1.15 Print All Queued Notices Button

This control allows the user to print all of the Waiting List Activation Notices that have been queued for printing at a later time. The Print All Queued Notices button will be enabled when the Manage Waiting List Dialog is active. The button has a mnemonic of “P.”

2.3.1.16 Close Button

This control allows the user to exit the Manage Waiting List Dialog and return to the calling Dialog. The Close button will be enabled when the Manage Waiting List Dialog is active. It does not have a mnemonic and is the cancel button for the Dialog.

2.3.2 Processes

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

2.3.2.1 Edits

Upon selection of the Refresh View button, the system will check that legitimate values are entered in the controls as follows:

- The value of the Receive Benefits as of masked edit box must be equal to or greater than the current system date

- The value of the Receive Benefits as of masked edit box must be less than or equal to the date 180 days in the future
- The value of the Show Top Entries masked edit box must be greater than one (1)
- The value of the Show Top Entries masked edit box must be equal to or less than the total number of entries in the Waiting List display grid.

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

If the Show Top Entries check box is selected, the system will check that a value has been entered in the Show Top Entries masked edit box.

If the May be eligible to receive benefits as of radio button is selected, the system will check that a value has been entered in the Receive Benefits as of masked edit box.

2.3.2.2 Refresh Waiting List View

Upon completion of the above-listed edits, the system will refresh the Waiting List display grid with only those applicants that correspond to the selected view criteria. The system will update the Total value label to indicate how many applicants fit the selected view criteria. After the list is refreshed, the Refresh View button will be disabled.

2.3.2.3 Open Folder

Upon selection of the Open Folder button, the system will check the permissions of the currently logged-on user to determine if they have the appropriate permissions to view the participant folder. The user must have at least one of the following permissions to view the participant folder.

- Demographics.View, Add or FullControl
- Height/WeightandBlood. View, Add or FullControl
- DietIntakeHistory. View, Add or FullControl
- RiskFactors. View, Add or FullControl
- FoodPrescriptions. View, Add or FullControl
- NutritionEducation. View, Add or FullControl
- CheckIssuance. View, Add or FullControl
- Immunizations. View, Add or FullControl
- Referrals. View, Add or FullControl
- HealthInformation. View, Add or FullControl
- IncomeHistory.View, Add or FullControl
- Appointments. View, Add or FullControl

When the user does not have the appropriate permissions, the system will invoke a standard error message with the text “You do not have the necessary permissions to view the Participant Folder. Please see the supervisor.”

If the user has permission the system will invoke the Participant Folder for the selected applicant. The Participant Folder is described in [Chapter 09 - Participant Folder](#).

2.3.2.4 Schedule Appointment for Applicant

Upon selection of the Schedule Appointment button, the system will invoke the [Schedule Appointment s for Household](#) dialog described in *Chapter 08 – Appointment Scheduling*.

2.3.2.5 Edit Applicant Information

Upon selection of the Edit button, the system will invoke the [Edit Waiting List Member Information](#) described in this document.

2.3.2.6 Activate Applicant

Upon selection of the Activate Applicant button, the system will invoke the [Activate Applicant Dialog](#) described in this document.

2.3.2.7 Remove Applicant from Waiting List

Upon selection of the Remove from Waiting List button, the system will invoke the [Remove from Waiting List Dialog](#) described in this document.

2.3.2.8 Print All Queued Waiting List Activation Notices

Upon selection of the Print All Queued Notices button, the system will invoke the Print Waiting List Activation Notices dialog defined in [System Outputs Chapter 01 – System Outputs](#).

2.4 Edit Waiting List Member Information

The Edit Waiting List Member Information Dialog allows the user to update the information for the applicant on the waiting list. This Dialog is invoked when the user selects the Edit button on the Manage Waiting List Dialog. (This function may not be applicable for your state.)

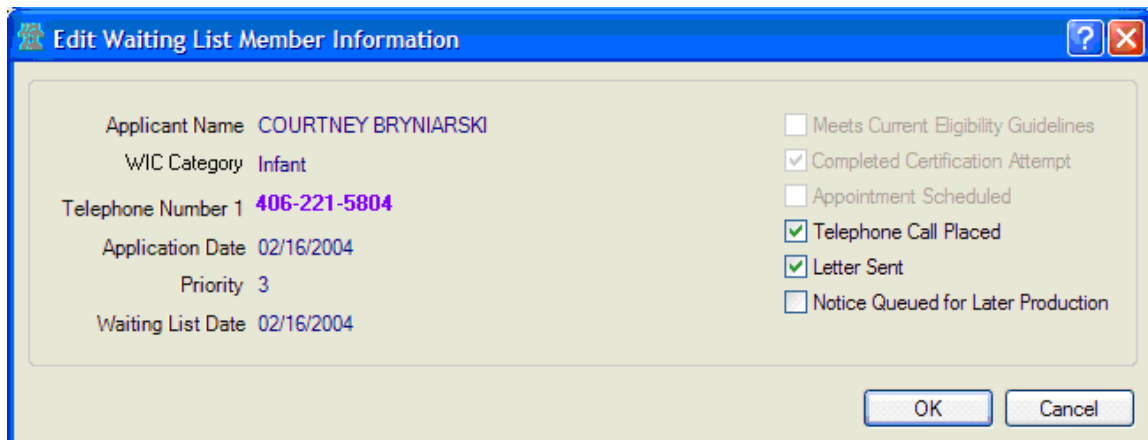


Figure 4 - Edit Waiting List Member Information Dialog

2.4.1 Controls

This section describes the behavior of the controls on the Edit Waiting List Member Information Dialog.

2.4.1.1 Applicant Name Text Label and Value

This control allows the user to view the name of the applicant. The value label will be filled with the value of the name of the applicant selected in the Waiting List display grid. It will display in the color blue.

2.4.1.2 WIC Category Text Label and Value

This control allows the user to view the WIC Category of the applicant. The value label will be filled with the value of the WIC Category of the applicant selected in the Waiting List display grid. It will display in the color blue.

2.4.1.3 Telephone 1 Text Label and Value

This control allows the user to view the telephone number of the applicant. The value label will be filled with the value of the telephone number of the applicant selected in the Waiting List display grid. It will display in the color blue.

2.4.1.4 Application Date Text Label and Value

This control allows the user to view the application date of the applicant. The value label will be filled with the value of the application date of the applicant selected in the Waiting List display grid. It will display in the color blue.

2.4.1.5 Priority Text Label and Value

This control allows the user to view the priority the applicant was added to the waiting list. The value label will be filled with the value of the priority of the applicant selected in the Waiting List display grid. It will display in the color blue.

2.4.1.6 Waiting List Date Text Label and Value

This control allows the user to view the date the applicant was added to the waiting list. The value label will be filled with the value of the waiting list date of the applicant selected in the Waiting List display grid. It will display in the color blue.

2.4.1.7 Meets Current Eligibility Guidelines Check Box

This control allows the user to view whether the applicant meets the current eligibility requirements. The check box will be marked when the selected applicant meets the current eligibility requirements. The value of this control is read-only.

2.4.1.8 Completed Certification Attempt Check Box

This control allows the user to view whether the applicant completed their certification attempt. The check box will be marked when the selected applicant has completed their certification attempt. The value of this control is read-only.

2.4.1.9 Appointment Scheduled Check Box

This control allows the user to view whether the applicant has an appointment scheduled. The check box will be marked when the selected applicant has an appointment scheduled. The value of this control is read-only.

2.4.1.10 Telephone Call Placed Check Box

This control allows the user to indicate that a telephone call was placed to the applicant. The check box will be enabled when the Edit Waiting List Member Information Dialog is active. It will be populated with the value of the Called column for the entry selected on the Waiting List display grid.

When the value of this control is changed, the Called column of the corresponding entry in the Waiting List display grid will be updated to reflect the value.

2.4.1.11 Letter Sent Check Box

This control allows the user to indicate that a waiting list activation letter was sent to the applicant. The check box will be enabled when the Edit Waiting List Member Information Dialog is active. It will be populated with the value of the Letter Sent column for the entry selected on the Waiting List display grid.

When the value of this control is changed, the Letter column of the corresponding entry in the Waiting List display grid will be updated to reflect the value.

2.4.1.12 Notice Queued for Later Production Check Box

This control allows the user to indicate that the Waiting List Activation Notice for the applicant should be queued for printing at a later time. The checkbox will be enabled when the Edit Waiting List Member Information Dialog is active. It will initially be blank.

2.4.1.13 OK Button

This control allows the user to instruct the system to edit the values of the controls, update the applicant information, and exit the Edit Waiting List Member Information Dialog. The OK button will be enabled when the Edit Waiting List Member Information Dialog is active. It does not have a mnemonic and is the default button for the Dialog.

2.4.1.14 Cancel Button

This control allows the user to exit the Edit Waiting List Member Information Dialog without updating the information for the applicant on the waiting list. The Cancel button will be enabled when the Edit Waiting List Member Information Dialog is active. It does not have a mnemonic and is the cancel button for the Dialog.

2.4.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Edit Waiting List Member Information Dialog.

2.4.2.1 Edits

No controls on the Edit Waiting List Member Information Dialog are considered required, therefore no edits are performed on this dialog.

2.4.2.2 Saving the Data

Upon successful completion of the above-listed edits, the system will save the values on the Edit Waiting List Member Information Dialog to the database. The values for the currently selected entry will be updated in the Waiting List display grid. The system then returns to the Manage Waiting List Dialog.

2.5 Activate Applicant

The Activate Applicant Dialog allows the user to activate an applicant and remove them from the waiting list. This Dialog is invoked when the user selects the Activate Applicant button on the Manage Waiting List Dialog. (This function may not be applicable for your state.)

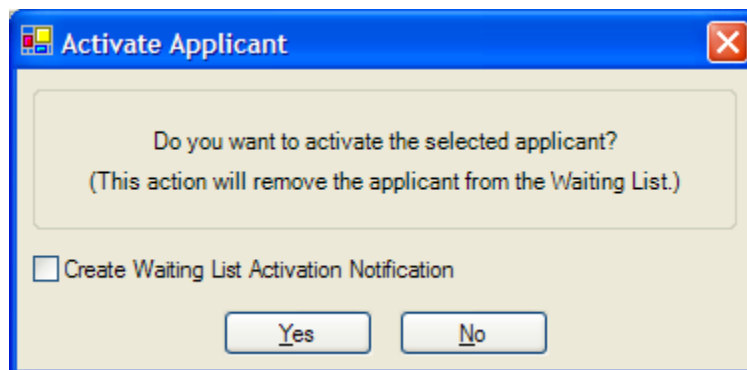


Figure 5 - Activate Applicant Dialog

2.5.1 Controls

This section describes the behavior of the controls on the Activate Applicant Dialog.

2.5.1.1 Create Waiting List Activation Notice Check Box

This control allows the user to create a waiting list activation notice document when the applicant is removed from the waiting list and made active. The check box will be enabled when the Activate Applicant Dialog is active. It has an initial value of cleared.

2.5.1.2 Yes Button

This control allows the user to confirm that the applicant should be removed from the waiting list and made active. The Yes button will be enabled when the Activate Applicant Dialog is active. It will have a mnemonic of “Y” and is the default button for the dialog.

2.5.1.3 No Button

This control allows the user to exit the Activate Applicant Dialog without applying any changes and return to the Manage Waiting List Dialog. The No button will be enabled when the Activate Applicant Dialog is active. It will have a mnemonic of “N” and is the cancel button for the dialog.

2.5.2 Processes

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

2.5.2.1 Edits

There are no updateable controls on the Activate Applicant Dialog; therefore, therefore there are no edits performed on this dialog

2.5.2.2 Activate Applicant

When the user selects the Yes button, the system will change the status of the applicant/participant to take them off the Waiting List and return their data to the state it was before they were added to the list. If the applicant was added to the Waiting List from the Prescreening Dialog, the system will place them back in that state so the user can start a certification attempt. If the applicant was added to the Waiting List from a certification attempt, the system will place back into the incomplete certification attempt so the user can complete the certification process. The system will return to the Manage Waiting List Dialog and the contents of the Waiting List display grid will be updated to reflect the removal of the applicant from the waiting list.

2.5.2.3 Create Waiting List Notification

When the user selects the Yes button and the Create Waiting List Activation Notice check box has been selected, the system will produce for the applicant a Waiting List Activation Notice defined in [System Outputs Chapter 01 – System Outputs](#).

2.6 Remove Applicant from Waiting List

The Remove Applicant from Waiting List Dialog allows the user to remove an applicant from the waiting list. After the applicant is removed, they will be inactive in the system and cannot be certified to receive WIC benefits. This Dialog is invoked when the user selects the Remove from Waiting List button on the Manage Waiting List Dialog. (This function may not be applicable for your state.)

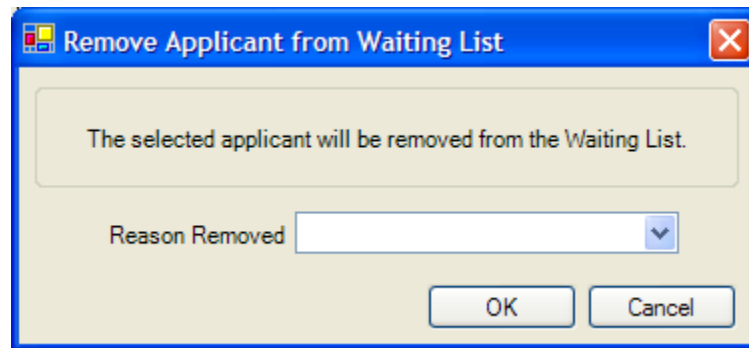


Figure 6 - Remove Applicant from Waiting List Dialog

2.6.1 Controls

This section describes the behavior of the controls on the Remove Applicant from Waiting List Dialog.

2.6.1.1 Reason Removed Dropdown

This control allows the user to select the reason that the applicant was removed from the waiting list. The dropdown will be enabled when the Remove Applicant from Waiting List Dialog is active. The dropdown list will contain a list of valid reasons from a table in the lookup database. The field will default initially blank.

2.6.1.2 OK Button

This control allows the user to instruct the system to edit the values of the controls, remove the applicant from the waiting list, and exit the Remove Applicant from Waiting List Dialog. The OK button will be enabled when the Remove Applicant from Waiting List Dialog is active. It does not have a mnemonic and is the default button for the Dialog.

2.6.1.3 Cancel Button

This control allows the user to exit the Remove Applicant from Waiting List Dialog without removing the applicant from the waiting list. The Cancel button will be enabled when the Remove Applicant from Waiting List Dialog is active. It does not have a mnemonic and is the cancel button for the Dialog.

2.6.2 Processes

This section describes the processes (navigation) that take place as a result of the actions taken on the Remove Applicant from Waiting List Dialog.

2.6.2.1 Edits

Upon selection of the OK button, the system will check that a selection is made in the following controls:

- Reason Removed dropdown

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

2.6.2.2 Remove Applicant from Waiting List

When the user selects the OK button, the system will remove the applicant from the waiting list and return to the Manage Waiting List Dialog. The contents of the Waiting List display grid will be updated to reflect the removal of the applicant from the waiting list.