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Operations Management

Section 5: Operations Management:

Section 5 - 1 :Update

Section 5 - 1.1 : Update Operations Information

Section 5 - 1.1.1 : Update Staff Data

Priority: Required

Window: Staff Data

Report: No

FSRD Reference: OM 1.2

Narrative:

This Window is used primarily to enter and maintain information about staff members and their positions in the Arizona WIC Program. This screen also provides users the ability to record information about training classes attended by the staff member and primary/secondary language abilities.

The user will enter the alias for the staff member, which will be shown at the top of the columns of the spreadsheet shown in the Staff Day and Appointment Sheet screens.

[CO24] *Another provision is the ability to record Non-WIC Contractor information for those investigators used by the State Agency for Vendor investigations.* ***[END CO24]***

Data Current As Of: Run Time

Frequency: On Demand

Role(s): Operations Management, LA System Admin., CSF Manager, ADHS Viewer

Section 5 - 1.1.1.1 : Staff Data - Main

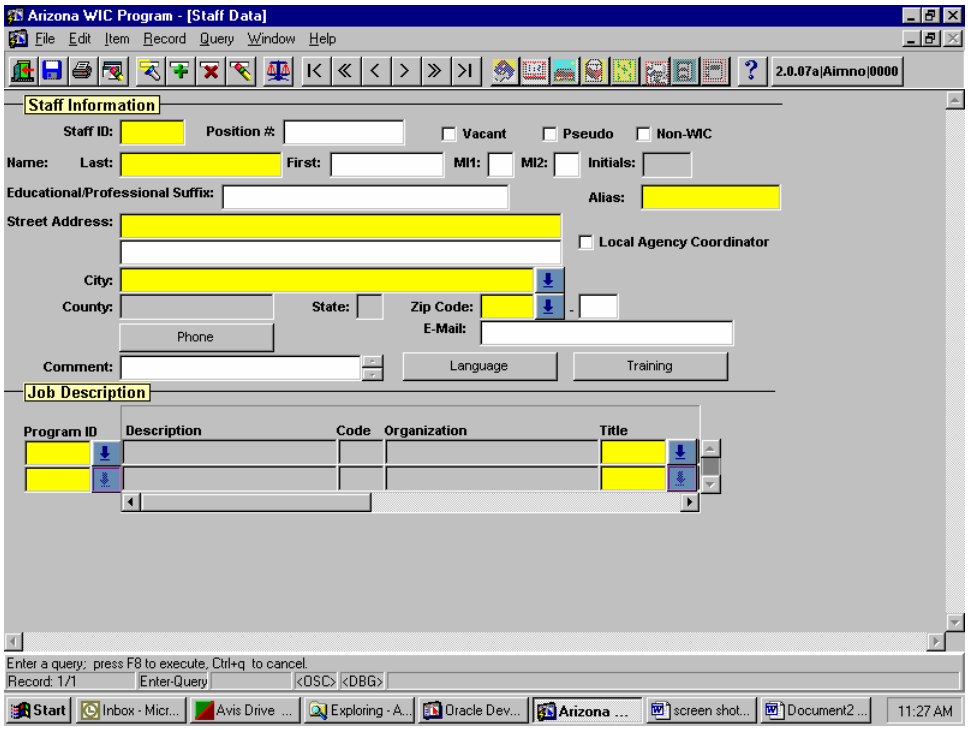

Figure 1 - Staff Data-Main

Fields

Staff ID - The numeric, system generated, 5 digit staff person's identification number. The system will assign different blocks of number to different local agencies. When the user clicks the Add Record icon from the toolbar, the system will calculate the next available 5 digit staff ID number for that local agency and populate the field with that value. This field is mandatory.
Position # - A 10 digit Alpha-numeric user entry that represents the position the staff member holds. This field is optional.
Last Name - The staff person's last name. This field is mandatory and is user-entered. If the Vacant check box is checked, this will default to VACANT.
First Name - The staff person's first name. This field is optional and is user-entered (except if the Vacant check box is checked).
MI1 - Staff person's first middle initial. This field is optional and will not be greyed out.
MI2 - Staff person's second middle initial. This field is optional and will not be greyed out.
Initials - The first letters of the information entered in the Last, First , MI1, and MI2 fields are displayed consecutively in this field. This field is display only.
Educational/Professional Suffix - The staff person's educational and professional title, such as Ph.D., MPH, etc. This field is optional and is user-entered.
Alias – This field is entered by the user with a six character, alphanumeric value to represent the Staff Member on the Staff Day and Appointment Sheet in the Appointment Scheduler module. The staff member's alias will appear at the top of the columns of the flexible grids. This field is mandatory.
Street Address - The street address where the staff person works. This field is mandatory.
City - The city where the staff member works. This field can be entered manually or the user can select a value from the list of values. Selection of a city will fill in the county, state and zip code. For more information, please refer to the Locales window in System Administration. This field is mandatory.

County - The county where the staff member works. This field is display only and will be populated when a city or zip code is selected.
State - The state where the staff member works. This field is display only and will be populated when a city or zip code is selected.
Zip Code - The zip code where the staff member works. This field can be entered manually or the user can select a value from the list of values. Selection of a zip code will fill in the city, county and state. The additional four digit code is user entered. For more information, please refer to the Zip Codes window in System Administration. The first field is mandatory and the second is optional.
E-Mail - The staff person's E-mail identification. This field is optional.
Comment - The user may provide any comments or remarks. This field is optional.
Program ID - Clicking on the list of values button allows the user to assign the staff member a program supported by a particular organization, such as WIC, CSFP, etc. For more information, please refer to the Program Categories window. This field is mandatory.
Description - Name of the program category selected by the user in the Program ID field. This field is display only.
Code - The code number associated with the State Agency or a specific Local Agency or Clinic organization. The field is display only and is populated when Program ID is selected.
Organization - This field displays the name of the State Agency, Local Agency or Clinic and is populated when Program ID is selected. This field is display only.
Title - Clicking on the list of values button allows the user to assign the staff member a title, such as nutritionist. For more information, please refer to the Maintain Staff Titles window. This field is mandatory.

Check Box(es)

Vacant - The Vacant check box is available to the user to indicate that the staff member position is vacant. If this box is checked, the last name and first name will be set to "VACANT".
Pseudo - Used to create false staff member for scheduling purposes. This staff member and position don't actually exist. Pseudo's are used for overbooking purposes.
Non-WIC - When selected by the user, this identifies a non-WIC staff member such as a temporary employee.
[CO24] Non-WIC Contractor - *If checked, the staff member is a non-WIC employee who is not a temporary employee, but is contracted by the State and/or Local Agency; e.g., an employee who works for the State Agency performing Vendor investigation functions.* ***[END CO24]***
Local Agency Coordinator - If checked, the staff member is a Local Agency Coordinator.

Push Button(s)

Language - Clicking this button allows the user to enter primary and secondary language capabilities of the staff member.
Training - Clicking this button allows the user to enter information about training classes attended by the staff member.
Phone - Clicking this button allows the user to enter phone information.

Calculation(s)

When the user clicks the Add Record icon from the toolbar, the system will calculate the next available 5 digit staff ID number for that local agency and populate the field with that value.

Background Process(es)

The system uses the first letters of the information entered in the Last, First , MI1 and MI2 fields and displays them consecutively in the Initials field. The system displays each of these letters as they are entered.

Section 5 - 1.1.1.2 : Staff Data-Main 2

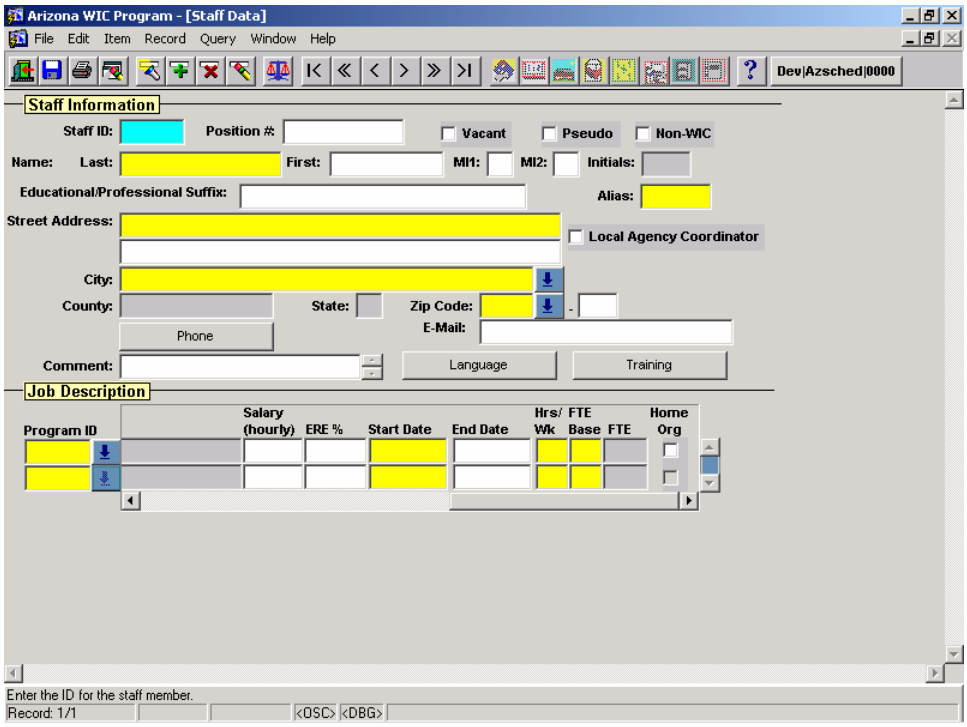

Figure 2 - Staff Data - Main 2

Fields

Salary(hourly)- The hourly dollar salary received by this staff member. This field is mandatory.
ERE% - The Employee Related Expenses percentage which is entered for the employee by the Local Agency Coordinator. This percentage varies by Local Agency. This field is mandatory.
Start Date - The date that the person started a particular job at that location (agency or clinic). This field is required.
End Date - The date that the person ended a particular job at that location. This field is optional.
Hrs/Wk - The hours /week that a person is normally scheduled to work. This field is mandatory.
FTE Base - The system displays the value of 40 in this field as the number of hours per week that a full time worker will perform this job. This field is display only.
FTE - Displays in decimal format the Hours per Week divided by the FTE Base.

Check Box(es)

Home Org. - The job and organization that is the staff member's primary responsibility.

Calculation(s)

The system calculates the FTE field value by dividing the Hrs/Wk field entry by the FTE Base entry.

Background Process(es)

None.

Section 5 - 1.1.1.3 : Staff Data-Phone popup

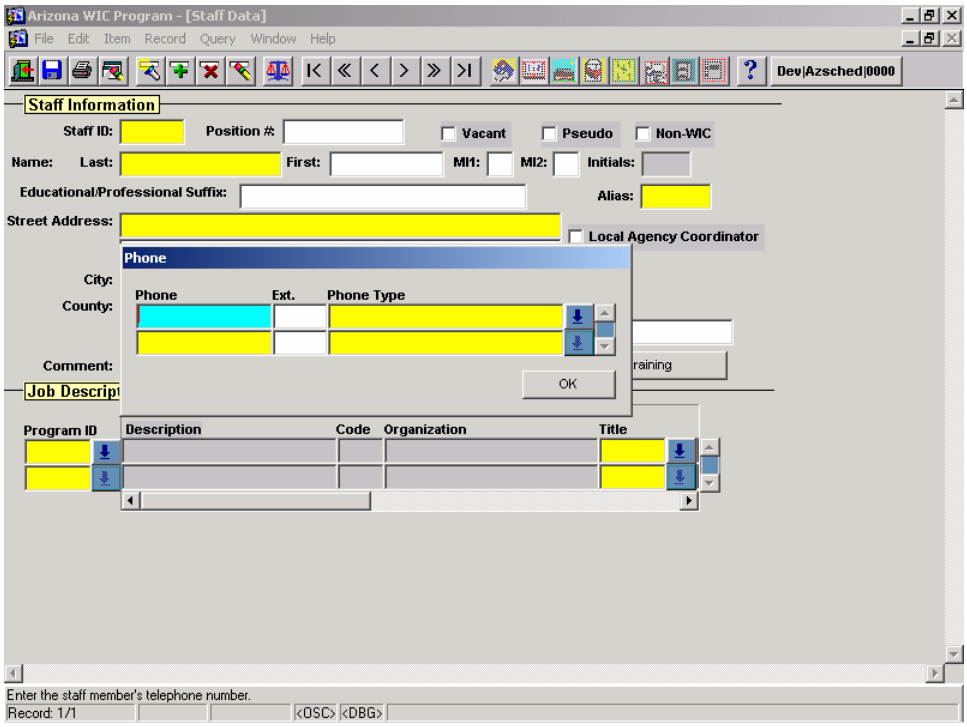

Figure 3 - Staff Data-Phone popup

Fields

Phone Number - The staff person's work phone number, including area code. This field is optional.
Ext. - The staff person's work extension number, if applicable. This field is optional.
Phone Type - The phone type description is selected from the list of values. This field is mandatory if a phone number is entered. For more information, please refer to the Phone Types window in System Administration.

Push Button(s)

OK - Clicking on this button saves the information entered and exits the window.

Calculation(s)

None.

Background Process(es)

None.

Section 5 - 1.1.1.4 : Staff Data-Languages popup

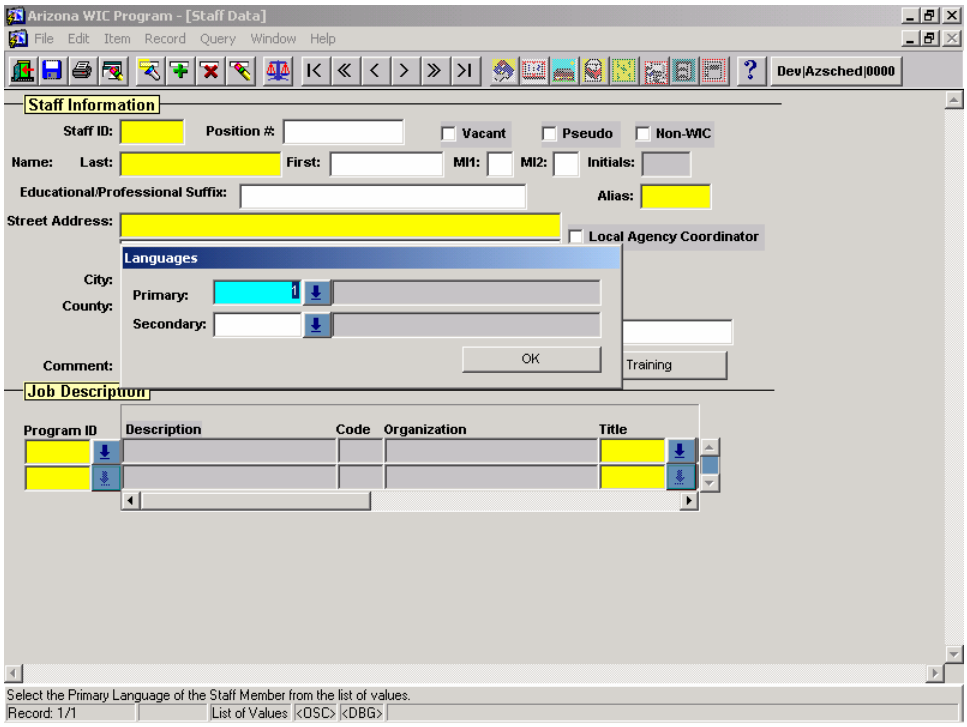

Figure 4 - Staff Data-Languages popup

Fields

Primary - Clicking the list of values button allows the user to select the appropriate primary language for this staff member. For more information, please refer to the Maintain Languages window in Enrollment and Certification. This field is mandatory.
Secondary - Clicking the list of values button allows the user to select the appropriate secondary language for this staff member. For more information, please refer to the Maintain Languages window in Enrollment and Certification. This field is optional.

Push Button(s)

OK - Clicking on this button saves the information entered and exits the Languages window.

Calculation(s)

None.

Background Process(es)

None.

Section 5 - 1.1.1.5 : Staff Data-Training popup

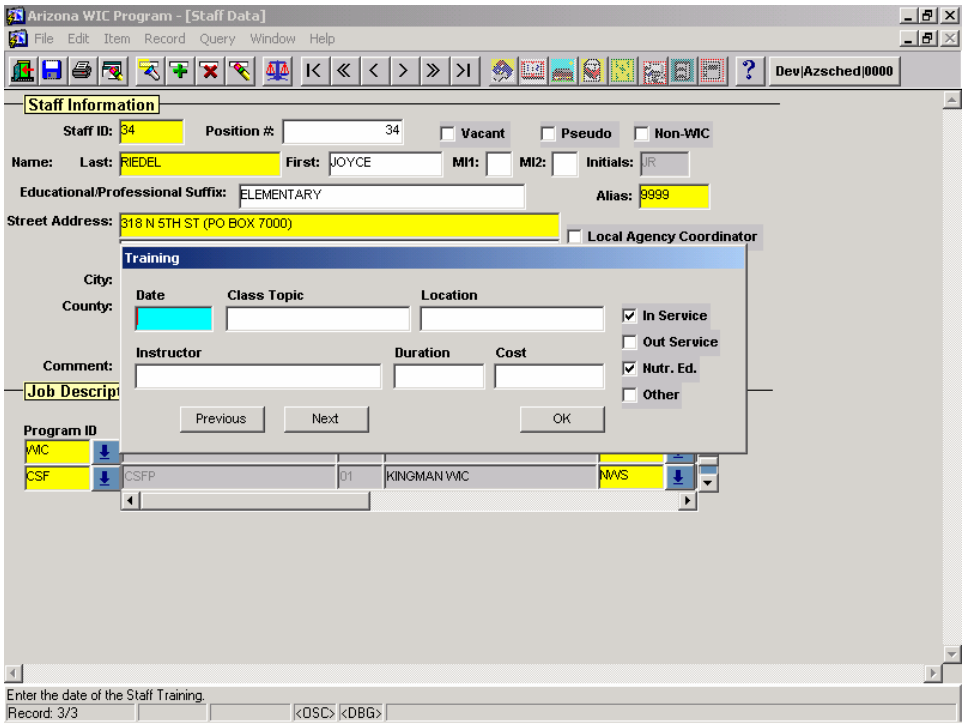

Figure 5 - Staff Data-Training popup

Fields

Date - User entered beginning date the class was given. This field is optional.
Class Topic - User entered name of the class attended by the staff member. This field is optional.
Location - User entered location of the class attended by the staff member. This field is optional.
Instructor - User entered first and last name of the instructor giving the class. This field is optional.
Duration - Number of hours of training provided in the class. This field is optional.
Cost - The dollar value charged, if any, for the staff member to attend this training course. This field is optional.

Check Box(es)

In-service - The user selects this check box if the training course was provided within the WIC program.
Out-service - The user selects this check box if the training course was provided outside of the WIC program.
Nutr. Ed. - This check box is selected if the course taken provided training about nutrition education topics.
Other - This check box is selected if the course taken provided training about a topic other than nutrition education.

Push Button(s)

Previous - Clicking on this button allows the user to display the previous training record stored in the system for this staff member. The previous record will be for a training class taken by the staff member more recently.
Next - Clicking on this button allows the user to display the next training record stored in the system for this staff member. The system defaults to display the most recent training class when this window is brought up, so when the user clicks this next push button, the next record shown will be older.
OK - Clicking on this button saves the information entered and exits the Training window.

Calculation(s)

None.

Background Process(es)

The system displays the most recent training record stored in the system for this staff member when the screen is initially displayed.

The user can navigate to more recent or older training records for a staff member by clicking the < and > VCR buttons respectively.

Operations Management

Section 5 - 1.1.2 : Update Organizational Units Information

Priority: Required

Window: Organizational Units

Report: No

FSRD Reference: OM 1.1

Narrative:

This Window is used to capture and maintain information about organizational units (State Agency, Local Agency, Clinic) in the Arizona WIC Program as well as the program categories and outreach / referral organizations that are associated with that clinic or agency.

Data Current As Of: Run Time

Frequency: On Demand

Role(s): Operations Management, LA System Admin., ITS Admin., CSF Manager, ADHS Viewer

Section 5 - 1.1.2.1 : Organizational Units

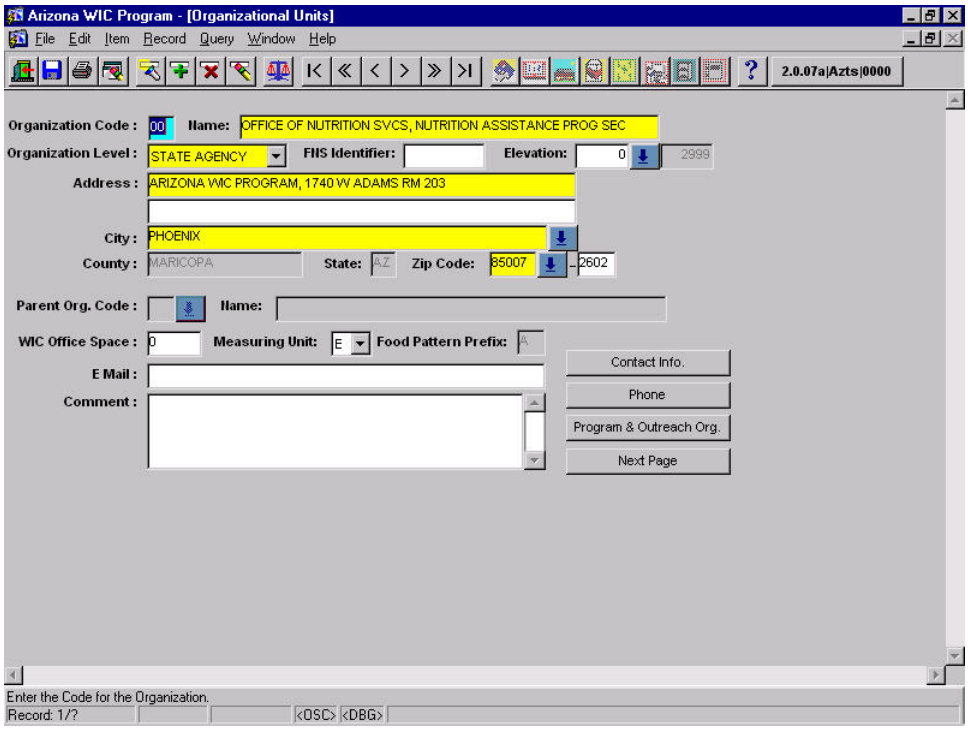

Figure 6 - Organizational Units

Fields

Organization Code - The organization's identification number. This field is mandatory and is user entered.
Name - The organization's name. This field is mandatory and is user entered.
Organization Level - Clicking on this drop down list allows the user to assign the organization level using the list which contains the values: STATE AGENCY, LOCAL AGENCY, CLINIC, with the distribution site being assigned at the clinic level. This is mandatory and will default to LOCAL AGENCY. The user selectable values for this field are stored in a preprogrammed domain.
FNS Identifier - This is an optional field in which the user enters the Food and Nutrition Services (FNS) assigned identification number.
[CO19] Elevation - *The elevation in feet above sea level of the organizational unit. This field is optional. The user is not required by the system, but should enter an elevation for all clinics in order to facilitate CDC reporting requirements.****[END CO19]***
Address - The address of the organization. The first field is mandatory and the second is optional.
City - The city of the organization. This field can be entered manually or the user can select a value from the list of values. Selection of a city will fill in the state and zip code. For more information, please refer to the Locales window. This field is mandatory.
County - The county of the organization. This field is display only and will be populated when a city or zip code is selected.
State - The state of the organization. This field is display only and will be populated when a city or zip code is selected.
Zip Code - The zip code of the organization. This field can be entered manually or the user can select a value from the list of values. Selection of a zip code will fill in the city and state. The additional four digit code is user entered. For more information, please refer to the Zip Codes and Locales windows in

System Administration. The first field is mandatory and the second is optional. This zip code value also serves as the default value for the family's zip code in the Certification - Precertification and Family Information windows.
Parent Org. Code - Clicking on the list of values button allows the user to select the parent organization. This will be disabled if the organization level is State Agency. If the organization level is Local Agency, the list of values will contain the state agency. If the organization level is Clinic, the list of values will contain all of the local agencies. The user selectable values are provided by the Organization Codes of other records stored from this Organizational Units window. This field is mandatory.
Name - The parent organization's name is displayed when the organizational code is selected in the previous field. This field is display only.
WIC Office Space - The square feet of the office space allocated for the WIC program at the specific organization site. This field is optional.
Measuring Unit - This field indicates how standard measurements are taken (English/Metric). The user selectable values in this field are stored in a preprogrammed domain. This field is optional.
Food Package Prefix - Used as a prefix for any Custom Food Package ID; unique within each Clinic in a Local Agency. This field is display only and is generated when the user saves a record to the database.

E-Mail - The organization's E-mail address. This field is optional.
Comment - The user may provide any comments or remarks. This field is optional.

Push Button(s)

Contact Info - Clicking on this button allows the user to enter contact information for an organizational unit.
Phone - Clicking on this button allows the user to enter phone information.
Program & Outreach Org. - Clicking on this button allows the user to assign the program categories and Outreach / Referral Organizations to this organizational unit.
Next Page - Clicking on this button displays the Organizational Units-Organizational Unit Characteristics window and allows the user to enter additional organizational unit characteristic information such as not to print appointment notices and ***[CO23]*** *the nearest main cross streets to the clinic or local agency.****[END CO23]***

Calculation(s)

None.

Background Process(es)

The system populates the Name field next to the Parent Org. Code field after the user selects a parent organization code from the list of values.

Section 5 - 1.1.2.2 : Organizational Units-Contact Info popup

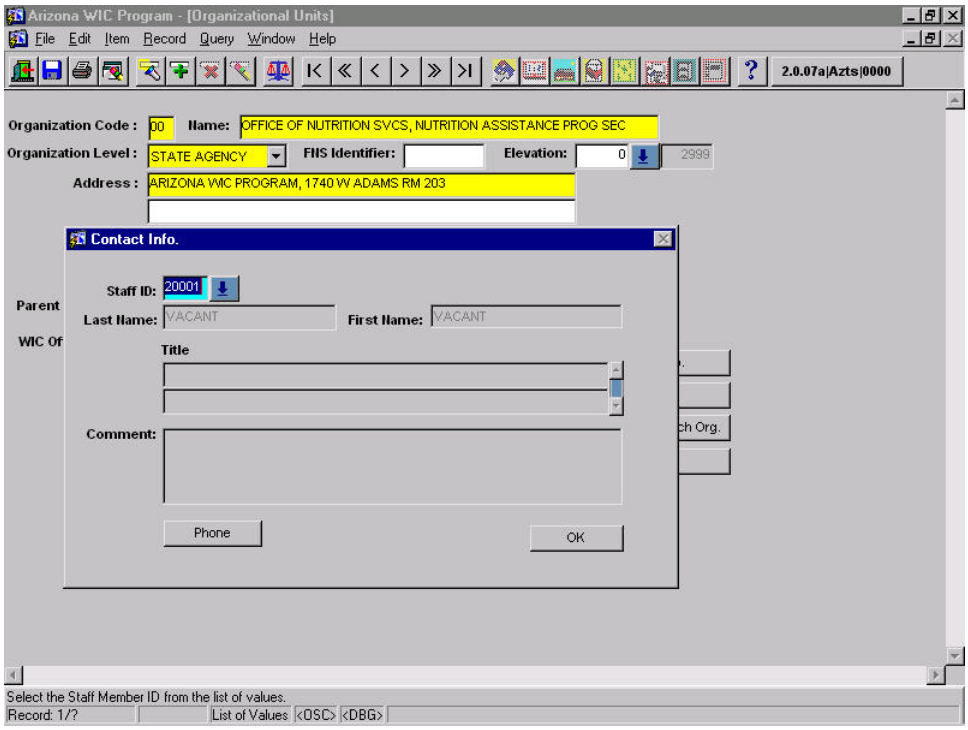

Figure 7 - Organizational Units - Contact Info popup

Fields

Staff ID - The user selects the identification number of the staff member who is designated as the contact for this organizational unit. This field is mandatory and is selected from the list of values. For more information, please refer to the Staff Data - Main window.
Last Name - The staff person's last name. This field is display only and is populated from the selection of a staff ID in the previous field.
First Name - The staff person's first name. This field is display only and is populated when a staff ID is selected.
Title- The contact's staff title(s) is/are displayed here when the staff ID is selected.
Comment -Comments regarding the staff person. This field is display only and filled when a staff ID is selected. The comment information, as well as the Last Name, First Name and Title, are populated by the information contained in the Staff member's record.

Push Button(s)

Phone - Clicking this button allows the user to view the phone information for the staff member.
OK - Clicking this button exits the Contact Info window and returns the user to the Organizational Units Window.

Calculation(s)

None.

Background Process(es)

The system populates the Last Name, First Name, Title and Comment fields with the appropriate Staff Data table information based upon the Staff ID selected by the user. These fields are populated immediately after the Staff ID field is populated.

Section 5 - 1.1.2.3 : Organizational Units-Contact Info-Phone popup

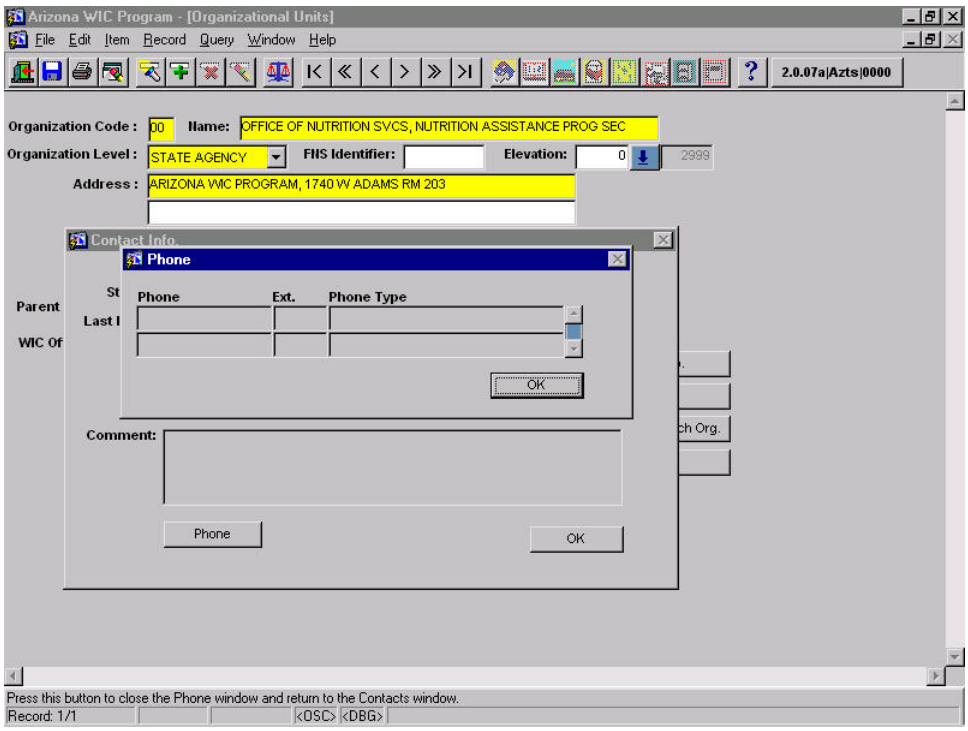

Figure 8 - Organizational Units-Contact Info-Phone popup

Fields

Phone - The contact person's phone number. This field is display only and is populated from the Staff Data record when the Staff ID is selected.
Ext. - The contact person's phone extension if any exists. This field is display only and is populated from the Staff Data record when the Staff ID is selected.
Phone Type - The contact person's phone type description. This field is display only and is populated from the Staff Data record when the Staff ID is selected.

Push Button(s)

OK - Clicking this button exits the Phone Push Button window and returns the user to the Contact Info window.

Calculation(s)

None.

Background Process(es)

The system displays the Phone, Ext. and Phone Type field with values from the Staff Data record based upon the Staff ID selected in the Organizational Units - Contact Info window.

Section 5 - 1.1.2.4 : Organizational Units-Phone popup

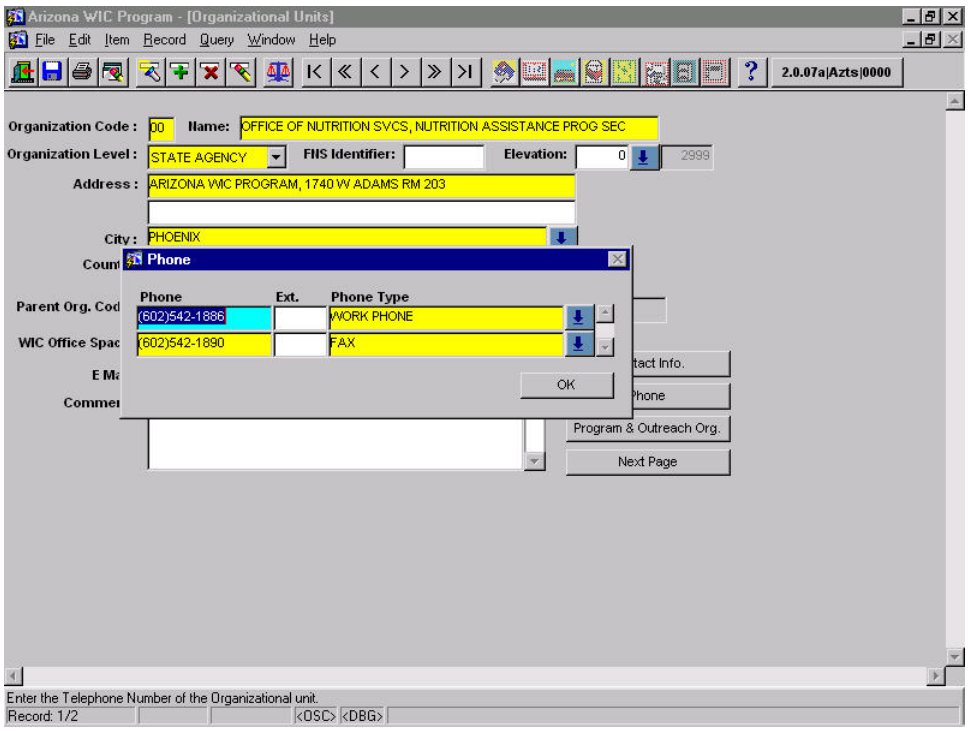

Figure 9 - Organizational Units-Phone popup

Fields

Phone - The organizational unit's phone number including area code. This field is user entered and the system automatically adds parentheses and a dash where appropriate. This field is mandatory.
Ext. - The extension number if one exists. This field is optional.
Phone Type- The phone type description is selected from the list of values. This field is mandatory if a phone number is entered. For more information, please refer to the Phone Types window in System Administration.

Push Button(s)

OK - Clicking this button closes the phone window.

Calculation(s)

None.

Background Process(es)

None.

Section 5 - 1.1.2.5 : Organizational Units-Programs & Outreach/Referral Orgs popup

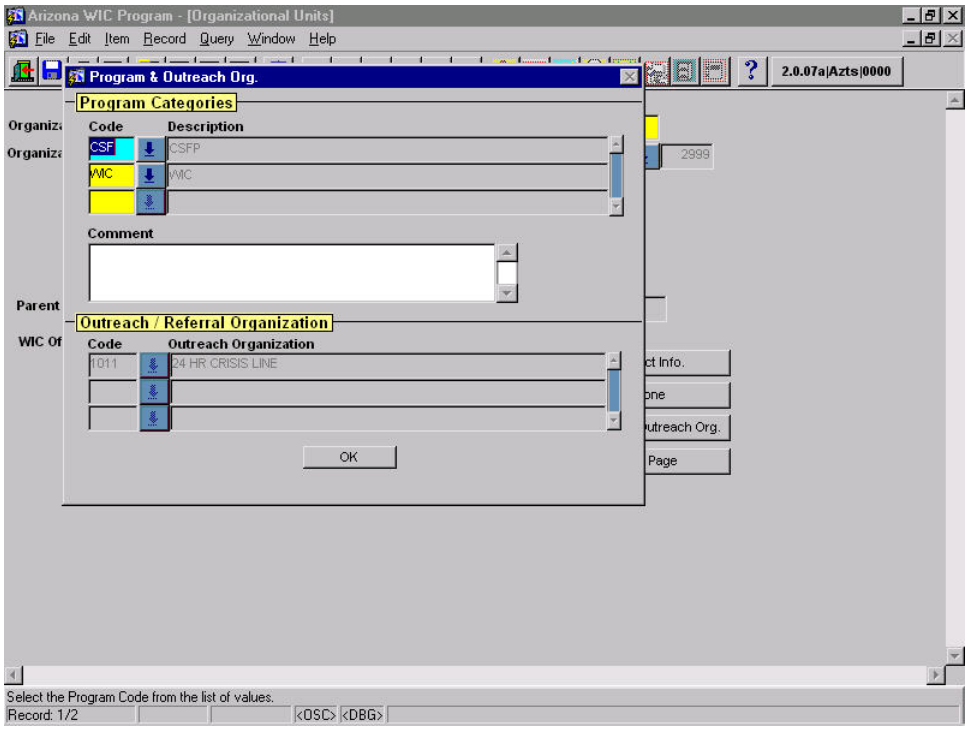

Figure 10 - Organizational Units-Programs & Outreach / Referral Organizations popup

Fields

Code - Clicking the list of values allows the user to select the program category identification code for which this organizational unit provides services. This field is mandatory and is selected from the list of values. For more information, please refer to the Program Categories window.
Description - The description for the program category selected above. This field is display only.
Comment - The user may provide any comments or remarks. This field is optional.
Code - The Outreach / Referral Organization identification number of the organization associated with the program category selected above. This field will be populated in two ways. First, this field is populated when a program category is selected from the list of values and second, the user may also enter additional Outreach / Referral Organizations not associated with the program categories selected above. For more information, please refer to the Outreach / Referral Organizations window.
Outreach / Referral Organization - The name of the Outreach / Referral Organization associated with the code from the list of values to the left of this field. This field is display only and is populated when an Outreach / Referral Organization code is selected from the list of values.

Push Button(s)

OK - Clicking on this button closes the Program and Outreach / Referral Organization window and returns the user to the Organizational Units window.

Calculation(s)

None.

Background Process(es)

The system populates the Code and Outreach / Referral Organization field with values corresponding to the Code selected under the Program Categories section of this window. The user can also independently select additional Outreach / Referral Organizations by clicking on the list of values button for the Code field under the Outreach / Referral Organization section of the screen.

Section 5 - 1.1.2.6 : Organizational Units-Organizational Unit Characteristics

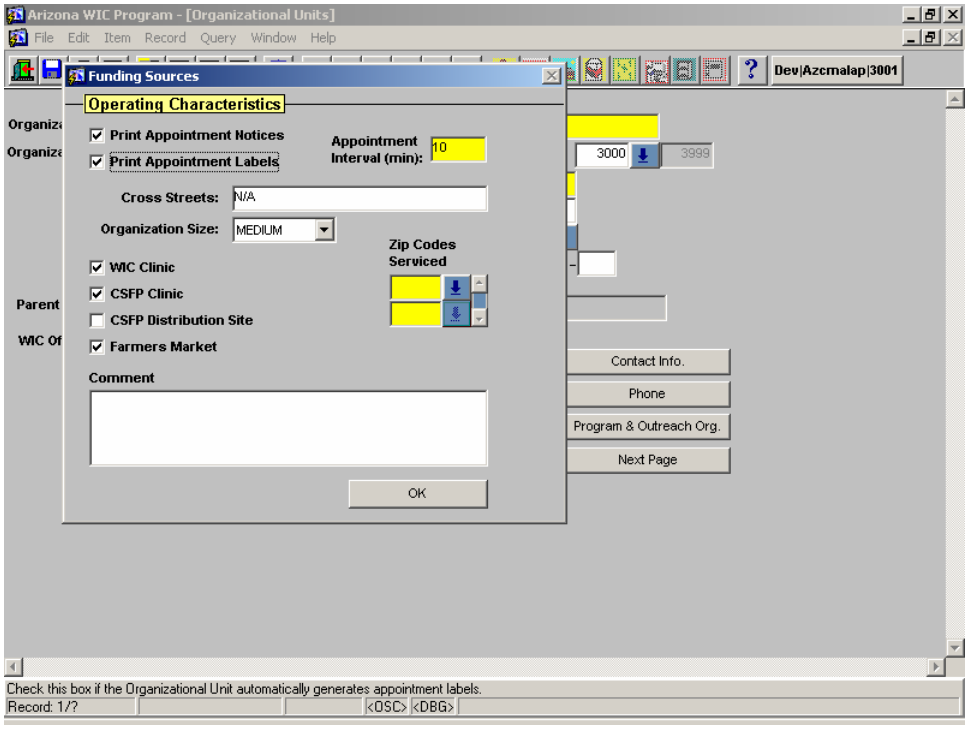

Figure 11 - Organizational Units-Organizational Unit Characteristics

Fields

Appointment Interval (min) – The time interval (in minutes) the clinic will use for appointments in the Appointment Scheduler module. This field is mandatory.
Cross Streets - The user may enter the intersection where the organizational unit is located. This field is mandatory.
Organization Size - Clicking on the list of values button allows the user to select the size of the organization unit from a pre-programmed domain of values. The user can choose one of the following: small, medium, large. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.
[CO23] Zip Codes Serviced - *Clicking on the list of values allows the user to select a zip code that this organizational unit provides services for. For more information, please refer to the Zip Codes window in System Administration. This is the field searched upon by the Zip Code Lookup on the Appointments-Main window in the Appointment Scheduler module.[END CO23]*

Check Box(es)

Print Appointment Notices - If the user selects (checks) this check box, this organizational unit will have appointment notices generated during the end of day process. This field will default to be checked.
Print Appointment Labels - If the user selects (checks) this check box, this organizational unit will have appointment address labels generated during the end of day process. This field will default to be checked.
WIC Clinic - If the user selects this check box, this organizational unit is designated as being a WIC clinic. This is useful in other sections of the system to allow a list of values button to only display WIC clinics for user selection.

CSFP Clinic - If the user selects this check box, this organizational unit is designated as being a CSFP clinic. This is useful in other sections of the system to allow a list of values button to only display CSFP clinics for user selection.
CSFP Distribution Site - If the user selects this check box, this organizational unit is designated as being a CSFP Distribution Site. This is useful in other sections of the system to allow a list of values button to only display CSFP Distribution Sites for user selection.
Farmers Market – If the user selects this check box, this organizational unit is designated as being a clinic that distributes Farmer's Market coupons. This check box must be checked in order for clients in the clinic to receive Farmer's Market coupons.

Push Button(s)

OK - Clicking this button closes the Organizational Units-Organization Unit Characteristics window and returns the user to the Organizational Units window.

Calculation(s)

None.

Background Process(es)

[CO23] *The system searches upon the values entered in the Zip Codes Serviced field in the Zip Code Lookup functionality on the Appointments-Main window in the Appointment Scheduler module.****[END CO23]***

Operations Management

Section 5 - 1.1.3 : Update Outreach / Referral Organizations

Priority: Required

Window: Maintain Outreach / Referral Organizations

Report: No

FSRD Reference: OM 1.1, OM 1.4, OM 2.1

Narrative:

This Window is used to capture and maintain information about Outreach / Referral Organizations and the Program Categories for which they provide services. The Outreach / Referral Organizations information entered in this window at the Local Agencies during the course of business will be "pushed" up to the Central Operations Server Database at MicroAge during the End of Day process. The Central Database then will have a complete store of updated Outreach / Referral Organization information each day, but each Local Agency server database will only house the Outreach / Referral Organization information that pertains to its clinics.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management, LA System Admin., ITS Admin., CSF Manager, ADHS Viewer

Section 5 - 1.1.3.1 : Outreach / Referral Organizations

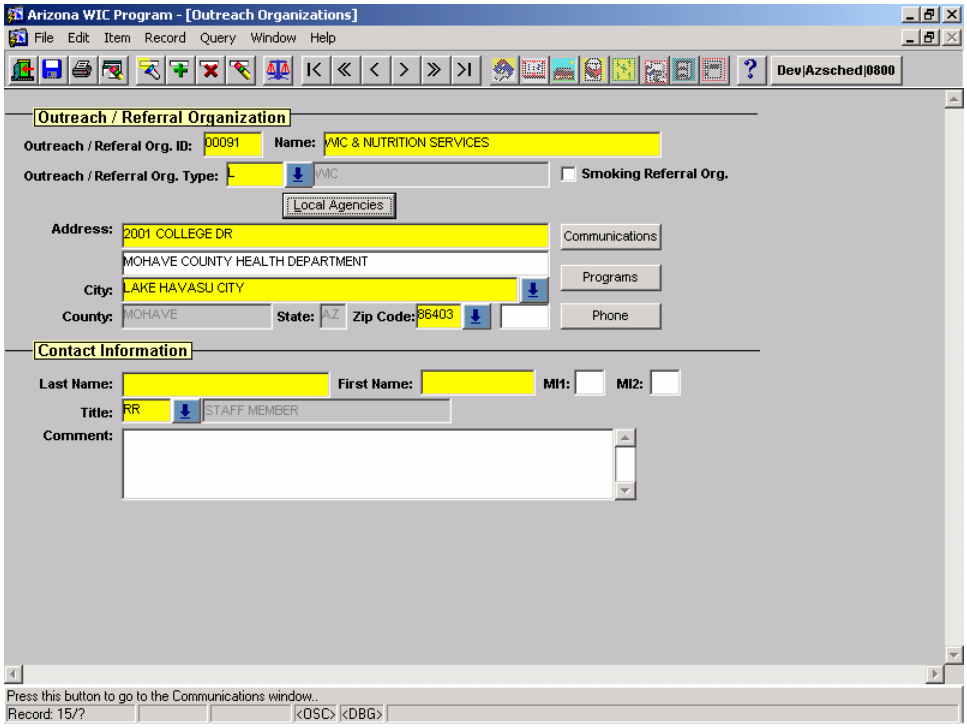

Figure 12 - Outreach/Referral Organizations

Fields

Outreach / Referral Org. ID - The Outreach / Referral Organization's numeric identification number. This field is mandatory and is system generated.
Name - The Outreach / Referral Organization's name. This field is mandatory and is user-entered**.**
Outreach / Referral Org. Type - Clicking on the list of values button allows the user to assign the outreach / referral org. type. For more information, please refer to the Maintain Outreach / Referral Organization Types window. The values provided by the table for this field are State maintained to ensure uniformity throughout the State of Arizona. This field is mandatory.
Address - The Outreach / Referral Organization's address. The first field is mandatory and the second is optional.
City - The Outreach / Referral Organization's city. This field can be entered manually or the user can select a value from the list of values. Selection of a city will fill in the state and zip code. For more information, please refer to the Locales window in System Administration. This field is mandatory.
County - The county where the Outreach / Referral Organization is located. This field is display only and will be populated when a city or zip code is selected.
State - The Outreach / Referral Organization's state. This field is display only and will be populated when a city or zip code is selected.
Zip Code - The Outreach / Referral Organization's zip code. This field can be entered manually or the user can select a value from the list of values. Selection of a zip code will fill in the city and state. The additional four digit code is user entered. For more information, please refer to the Zip Codes window in System Administration. The first field is mandatory and the second is optional.
Last Name - The Outreach / Referral Organization contact's last name. This field is mandatory and user entered.

First Name - The Outreach / Referral Organization contact's first name. This field is mandatory and user entered.
MI1 - The Outreach / Referral Organization contact's first middle initial. This field is optional and user entered.
MI2 - The Outreach / Referral Organization contact's second middle initial. This field is optional and user entered.
Title - Clicking the list of values button allows the user to select the contact's title at the Outreach / Referral Organization. The display only field to the right of the Title field populates with the title description when the title code is selected by the user. For more information, please refer to the Maintain Staff Titles window. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Check Box(es)

Smoking Referral Org. - This box is checked when listing referrals in the Smoking Referral questions in the tobacco pop-up in the Health History screens.

Push Button(s)

Local Agencies – Clicking on this button displays the Local Agencies window which allows the user to enter specific Local Agencies to which this Outreach/Referral Organization applies.
Communications - Clicking this button displays the Communications window which allows the user to enter records of correspondence sent and calls made to the Outreach / Referral Organization.
Programs - Clicking on this button displays the Outreach / Referral Organizations-Program Category window which allows the user to select the Program Category for which the Outreach / Referral Organization provides services.
Phone - Clicking on this button displays the Phone pop-up window which allows the user to enter phone contact information about the Outreach / Referral Organization.

Calculation(s)

None.

Background Process(es)

None.

Section 5 - 1.1.3.2 : Outreach/Referral Organizations-Local Agencies popup

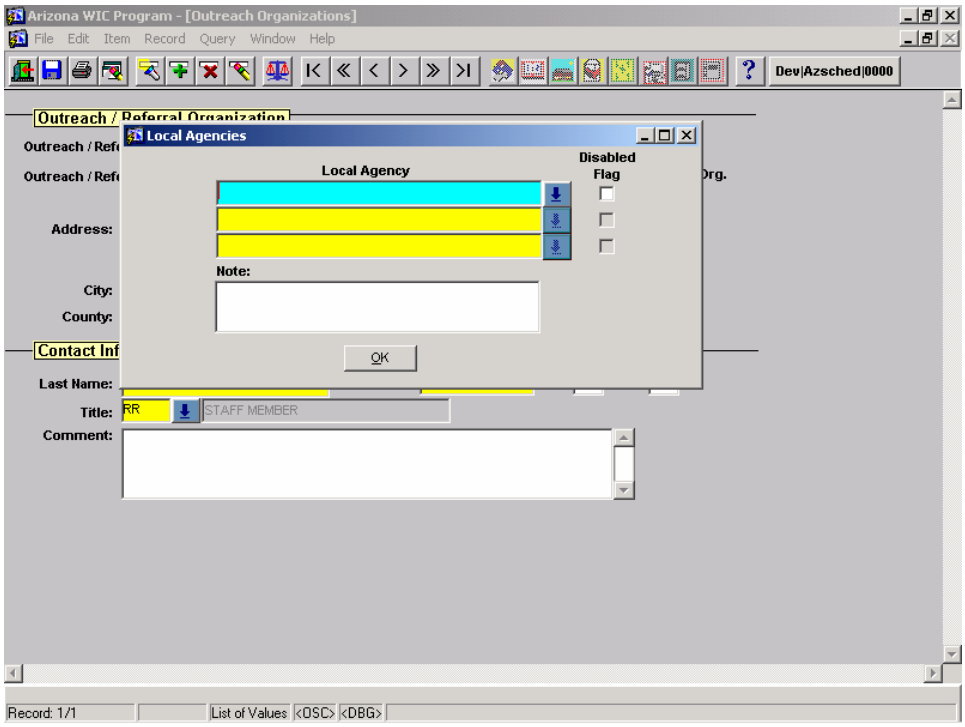

Figure 13 - Outreach / Referral Organizations-Local Agencies popup

Fields

Local Agency – Enter the local agency for which this Outreach / Referral Organization applies. This field is mandatory. The user can choose a local agency from the list of values.

Note – Enter a note which applies to this local agency record.

Check Box(es)

Disabled Flag – Check this box to disable this local agency.

Push Button(s)

OK – Exits from the Local Agencies screen.

Calculation(s)

None.

Background Process(es)

None.

Section 5 - 1.1.3.3 : Outreach / Referral Organizations-Communications popup

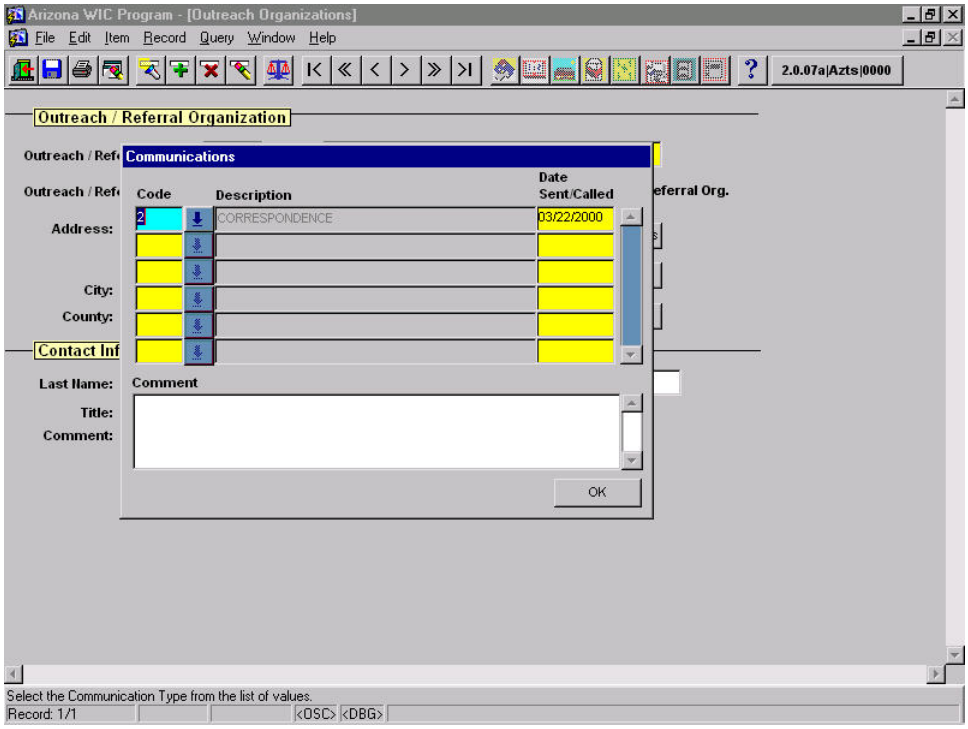

Figure 14 - Outreach / Referral Organizations-Communications popup

Fields

Code - The ID number of the communication type made to the Outreach / Referral Organization. This field is mandatory and selected from the list of values. For more information, please refer to the Outreach / Referral Communication Types window.
Description - The description of the communication is populated when the communication code is selected by the user in the previous field. This field is display only.
Date Sent/Called - The user entered date when the communication to the Outreach / Referral Organization occurred. This field is mandatory.
Comment - The user may provide any comments or remarks. This field is optional.

Push Button(s)

OK - Exits from the Communications window.

Calculation(s)

None.

Background Process(es)

None.

Section 5 - 1.1.3.4 : Outreach / Referral Organizations-Program Category popup

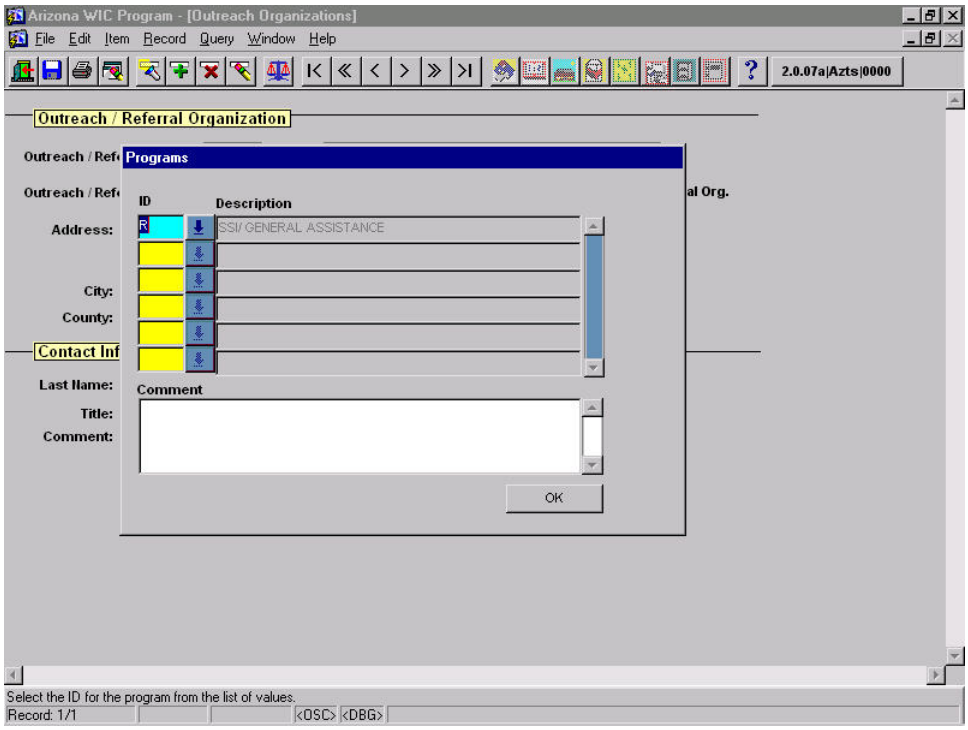

Figure 15 - Outreach / Referral Organizations-Program Category popup

Fields

ID - Clicking on the list of values button allows the user to select the code for the program category the Outreach / Referral Organization provides services for. For more information, please refer to the Program Categories window. This field is mandatory.
Description - Name of the program associated with the program category selected in the ID field. This display only field is populated immediately when the ID is selected.
Comment - The user may provide any comments or remarks. This field is optional.

Push Button(s)

OK - Exits from the Program Categories window.

Calculation(s)

None.

Background Process(es)

None.

Section 5 - 1.1.3.5 : Outreach / Referral Organizations-Phone popup

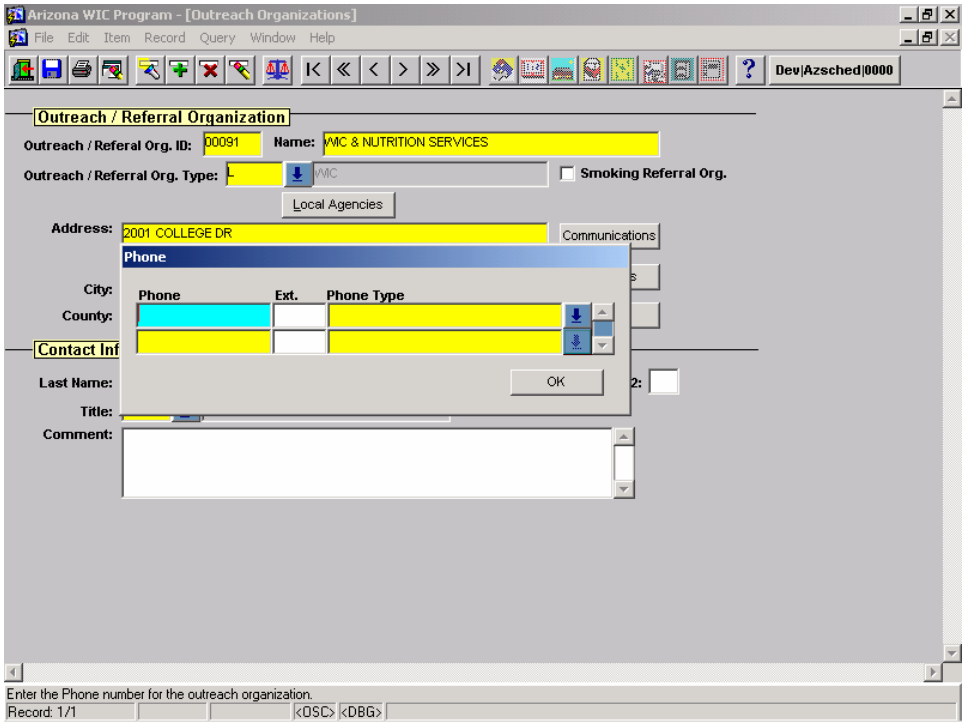

Figure 16 - Outreach / Referral Organizations-Phone popup

Fields

Phone - The Outreach / Referral Organization's phone number, including area code. This field is optional.
Ext. - The extension number, if applicable. This field is optional.
Phone Type- The phone type description is selected from the list of values. This field is mandatory if a phone number is entered. For more information, please refer to the Phone Types window in System Administration.

Push Button(s)

OK - Saves the user entered information and exits the user from the window.

Calculation(s)

None.

Background Process(es)

None.

Operations Management

Section 5 - 1.1.4 : Update Programs

Priority: Required
Window: Maintain Program Categories

Report: No

FSRD Reference: OM 1.3

Narrative:

This Window is used to define and maintain programs associated with the Arizona WIC Program, CSFP, and known Outreach / Referral Organizations. Through this window, the system also provides the ability to modify (turn off/on) the programs allowed for adjunctive eligibility determination. The system will store a history of the adjunctive eligibility being "off" and "on". The information maintained in this window is State entered and maintained.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management

Section 5 - 1.1.4.1 : Program Categories

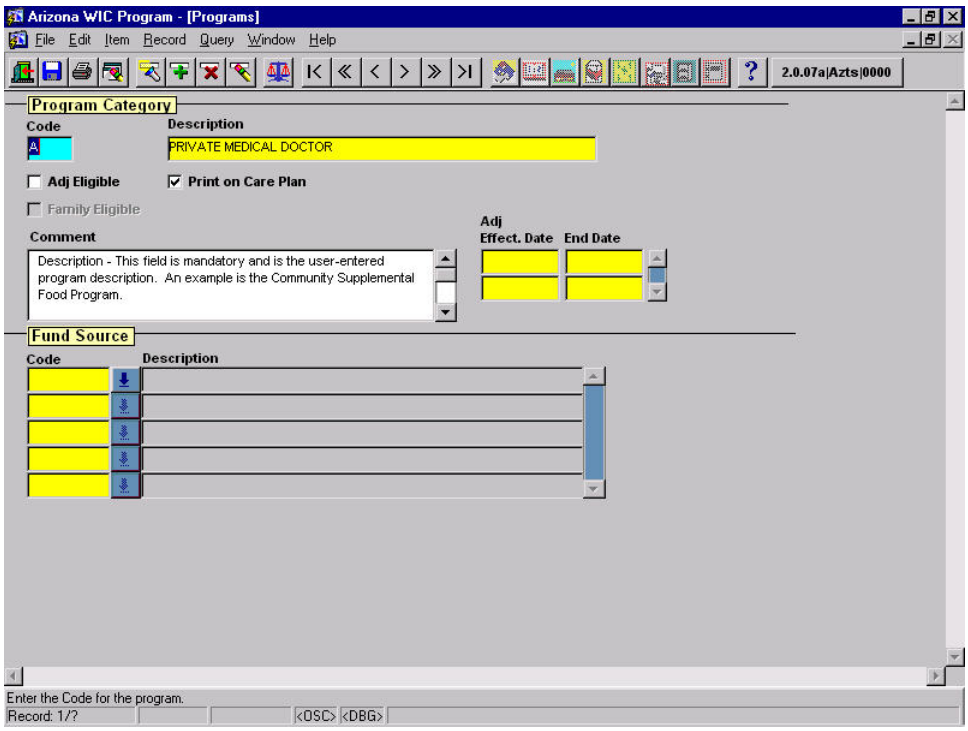

Figure 17 - Program Categories

Field

Code - An alpha identifier for a Program Category. This field is user entered and mandatory.
Description - This field is mandatory and is the user-entered program description. An example is the Community Supplemental Food Program.
Adj Effective Date - The start date of the period in which an applicant is adjunctively eligible for the WIC program if he/she is participating in the program category shown above. The most recent effective date will be displayed first. This field is optional.
End Date - The end date of the period in which an applicant is adjunctively eligible for the WIC program if he/she is participating in the program category shown above. This field is optional.
Comment - The user may enter any comments or remarks concerning the Program Category. This field is optional.
Code - This field is optional and by clicking on the list of values button the user can select codes for fund sources used to fund program categories. For more information, please refer to the Fund Sources in the Financial Management section.
Description - This field displays the name of the funding source from the code selected by the user in the previous field. This field is display only and is populated immediately after the user selects a Funding Source code.

Check Box(es)

Adj. Eligible - This box is checked if the applicant's enrollment in the program shown makes the applicant adjunctively eligible for the WIC program.
Family Eligible - This box is checked if the applicant's enrollment in the program shown makes the family adjunctively eligible for the WIC program.
Print on Care Plan - This box is checked if the Outreach/Referral Organization information will be allowed to print on participants care plan printouts.

Calculation(s)

None.

Background Process(es)

None.

Operations Management

Section 5 - 1.1.5 : Update Time Study Daily Log

Priority: Required

Window: Time Study-Daily Log

Report: No

FSRD Reference: Not in last version. Will be in Section OM 5.1

Narrative:

This window is used to capture and maintain individual staff member activity information in a variety of areas such as participant services, nutrition education and others. Individual staff members at clinics and local agencies enter their activity information which is then combined with other budgeting information to produce time study reports. Authorized users at the State and Local Agencies who have the Time Study Supervisor check box checked next to their user id in the Security screen in Systems Administration, will have the capability to view the Daily logs for all staff members in their agency.

Data Current As Of: Run Time

Frequency: On Demand

Role(s): Operations Management

Section 5 - 1.1.5.1 : Time Study - Daily Log

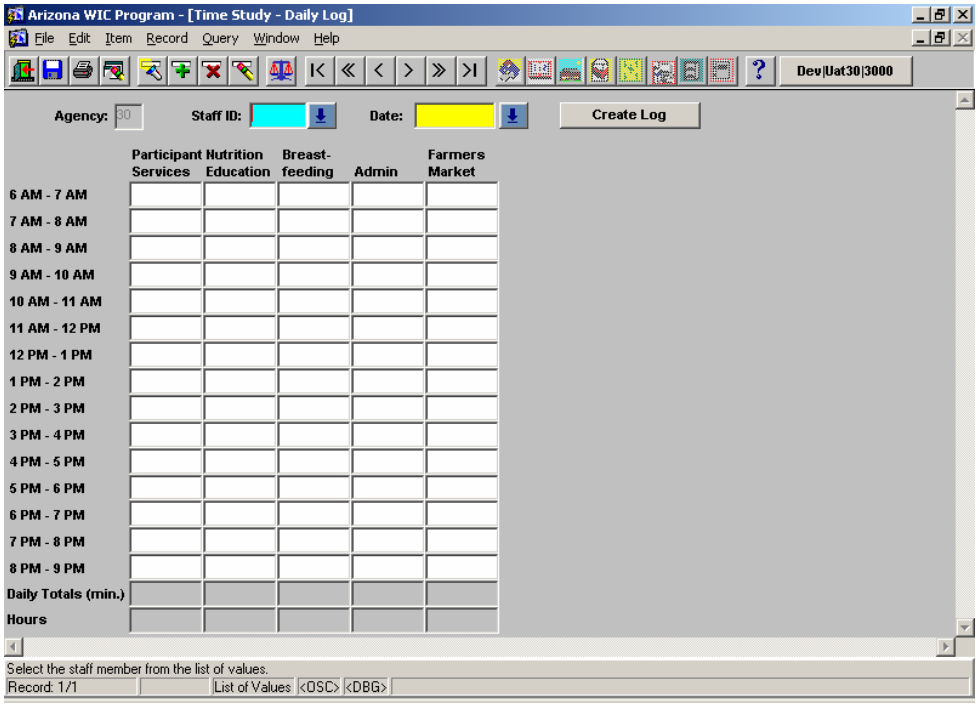

Figure 18 - Time Study-Daily Log

Fields

Agency - The system displays the Organization Code of the Agency the user logged into on the Logon screen. This field is display only.
Staff ID - Clicking on the list of values button allows the user who has the Time Study Supervisor capability checked off in the Systems Administration Security screen to select the ID number of another staff member in the Agency the user is logged into. Users without the Time Study Supervisor check box checked off in the Systems Administration Security screen will have their ID number appear in the Staff ID field when they enter this screen. They will not be able to view the Daily Log for other staff members in their agency. This field is mandatory for users with the Time Study Supervisor privilege and display only for those users without it.
Date - The user enters the date that the activity information below is being entered for. This field is mandatory.
Participant Services - The user enters the number of minutes during the corresponding hour (shown in Time Slot column) that was spent performing face to face services to participants, other than Nutrition Ed, B/F, CSFP, etc. (i.e., explain WIC rules, phone calls to participants, referrals, note taking, and also travel time to/from remote clinics to perform participant services). This field is optional.
Nutrition Education - The user enters the number of minutes during the corresponding hour (shown in Time Slot column) that was spent performing group or individual nutrition education services, which includes travel time to/from remote clinics to perform Nutrition Education services. This field is optional.
Breastfeeding - The user enters the number of minutes during the corresponding hour (shown in Time Slot column) that was spent performing B/F related services to participants. Includes travel time to/from remote clinics to provide B/F services. This field is optional.
Admin - The user enters the number of minutes during the corresponding hour (shown in Time Slot column) that was spent performing filing, meetings, clinic staff training, supply orders, policy & procedure issues, etc. This field is optional.

Farmers Market - The user enters the number of minutes during the corresponding hour (shown in Time Slot column) that was spent performing services related to Farmers Market. This field is optional.
Daily Totals (min) - The number of minutes spent performing the activity shown at the top of the column by the staff member for the date entered above. This field is calculated by the system.
Hours - The total number of hours spent performing the activity shown at the top of the column by the staff member for the date entered above. This field is calculated by the system.

Push Button(s)

Create Log - Allows user with Time Study Supervisor capability to create and view log information for other staff members in their agency.

Calculation(s)

The Daily Totals(min) field under each column is totaled by the system by adding the values in each column for the Time Slots from 6am to 9pm.

The Hours field under each column is calculated by the system by dividing the value in the Daily Total(min) field by 60.

Background Process(es)

The system allows a user with the Time Study Supervisor capability checked off in the Systems Administration Security screen to select other Staff IDs and view or enter time study log information for other staff members in their agency.

The system allows the user with the Time Study Supervisor capability to select a Staff ID based upon the agency and clinic entered in the Arizona WIC - [Log On] screen.

Operations Management

Section 5 - 1.1.6 : Update Annual WIC Cost Summary

Priority: Required

Window: Annual WIC Cost Summary

Report: No

FSRD Reference: Not in last version. Will be in Section OM 5.1

Narrative:

This window is used by the Local Agency Coordinator to capture, display and maintain budget costing data for his/her Local Agency for a Fiscal Year.

Data Current As Of: Run Time

Frequency: On Demand

Role(s): Operations Management, LA System Admin., ITS Admin., ADHS Viewer

Section 5 - 1.1.6.1 : Annual WIC Cost Summary

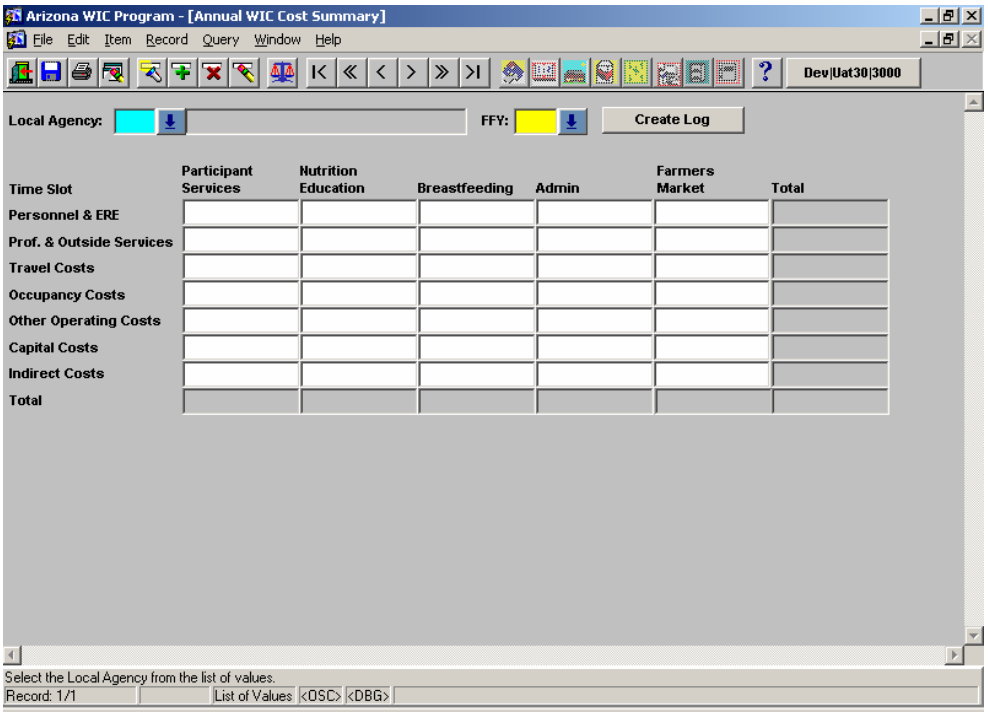

Figure 19 - Annual WIC Cost Summary 1 of 2

Fields

Local Agency - Clicking on the list of values button allows the Local Agency Coordinator to select his or her Local Agency. For more information, please refer to the Organizational Units window. This field is mandatory.

FFY- The Local Agency Coordinator enters the 4 digits of the Fiscal Year that the budget information is being entered for. This field is mandatory.

Personnel & ERE - The system utilizes the information being entered in the Time Study - Daily Log by the Local Agency staff to determine the values populated in this field for each category. The system records/displays the total Personnel & ERE costs for all staff members at the local agency selected for the fiscal year entered. This field is optional.

Professional & Outside Services - The Local Agency Coordinator enters the number of dollars expended for Professional & Outside Services in each of the activity categories shown at the top of each column. This field is optional.

Travel Costs - The Local Agency Coordinator enters the number of dollars expended for Travel in each of the activity categories shown at the top of each column. This field is optional.

Occupancy Costs - The Local Agency Coordinator enters the number of dollars expended for Occupancy Costs in each of the activity categories shown at the top of each column. This field is optional.

Other Operating Costs - The Local Agency Coordinator enters the number of dollars expended for Other Operating Costs in each of the activity categories shown at the top of each column. This field is optional.

Capital Costs - The Local Agency Coordinator enters the number of dollars expended for Capital Costs in each of the activity categories shown at the top of each column. This field is optional.

Indirect Costs - The Local Agency Coordinator enters the number of dollars expended for Indirect Costs in each of the activity categories shown at the top of each column. This field is optional.

Total (Time Slot) - The system totals the number of dollar spent on each of the activity categories in that local agency for the fiscal year shown.

Total (of Rows) - The system displays the total dollar amount for the dollar values entered in each row. This field is display only.

Push Button(s)

Create log - Allows user with Time Study Supervisor capability to create and view log information for other staff members in their agency.

Calculation(s)

The system calculates the Personnel and ERE values for each activity category by first calculating the total salary and benefit dollars spent on that activity for each local agency employee (Hourly Salary X # of hrs spent performing that activity type X the FTE rate). Next the ERE cost for that activity is calculated (total salary and benefit dollars spent performing that activity X ERE %). The system then adds these two results together for each staff member in the Local Agency. Finally, the system totals the Personnel & ERE cost for all staff members in a Local Agency for an activity and displays the total in the appropriate column in the Personnel and ERE row.

The system calculates the total of the costs in each column on the screen and displays the dollar value in the bottom row.

The system calculates the total of the cost values in each field in a row and displays that total in the total column to the right of each row.

Background Process(es)

When the user selects a Local Agency and Fiscal Year, the system will then populate the Personnel & ERE row with values from the calculations detailed above.

The system will provide a running total in the Total row at the bottom of the screen which will change as additional cost values are added to the rows above it.

Operations Management

Section 5 - 2 : Tables

Section 5 - 2.1 : Update Table Information

Section 5 - 2.1.1 : Update Outreach / Referral Organization Types

Priority: Required

Window: Maintain Outreach / Referral Organization Types

Report: No

FSRD Reference: OM 3

Narrative:

This Window is used to capture and maintain the Outreach / Referral Organization type codes and corresponding descriptions. This table is maintained at the State level to ensure uniformity throughout the AIM system.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management

Section 5 - 2.1.1.1 : Maintain Outreach / Referral Organization Types

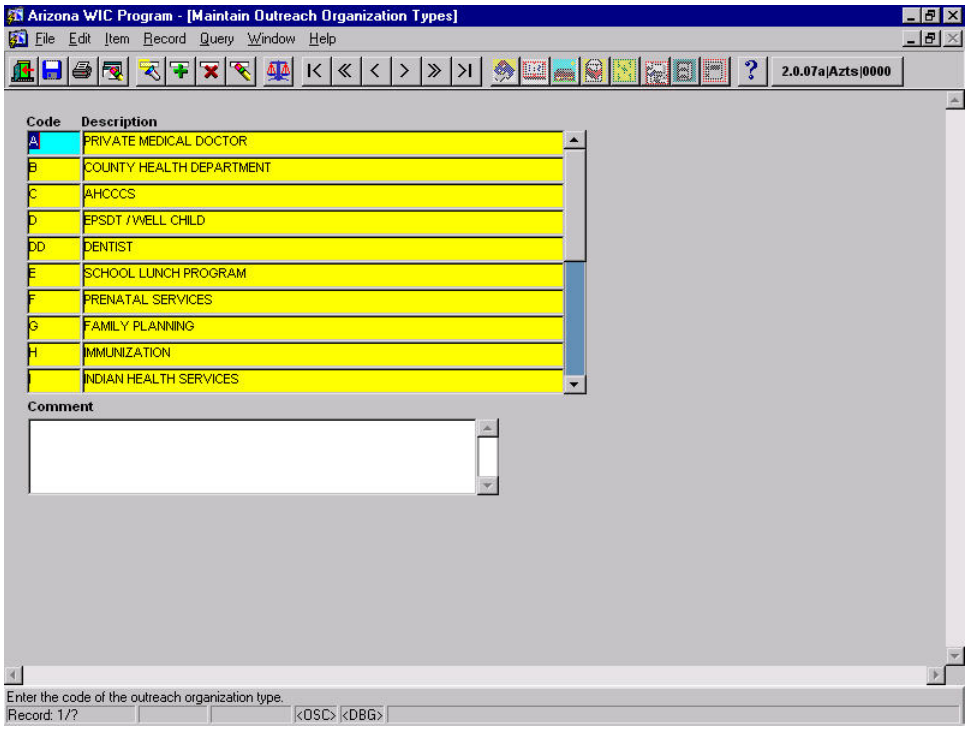

Figure 20 - Maintain Outreach / Referral Organization Types

Fields

Code - An alpha identifier for an Outreach / Referral Organization type. This field is mandatory.
Description - This field is mandatory and is the user-entered description of the corresponding Outreach / Referral Organization type.
Comment - The user may provide any comments or remarks regarding this Outreach / Referral Organization type. This field is optional.

Calculation(s)

None.

Background Process(es)

None.

Operations Management

Section 5 - 2.1.2 : Update Outreach / Referral Communication Types

Priority: Required

Window: Maintain Outreach / Referral Communication Types

Report: No

FSRD Reference: OM 3

Narrative:

This window is used to capture and maintain the types of communications that occur with Outreach / Referral Organizations. This table is maintained at the State level to ensure uniformity through the AIM system.

Data Current As Of: Run Time

Frequency: On Demand

Role(s): Operations Management

Section 5 - 2.1.2.1 : Maintain Outreach / Referral Communication Types

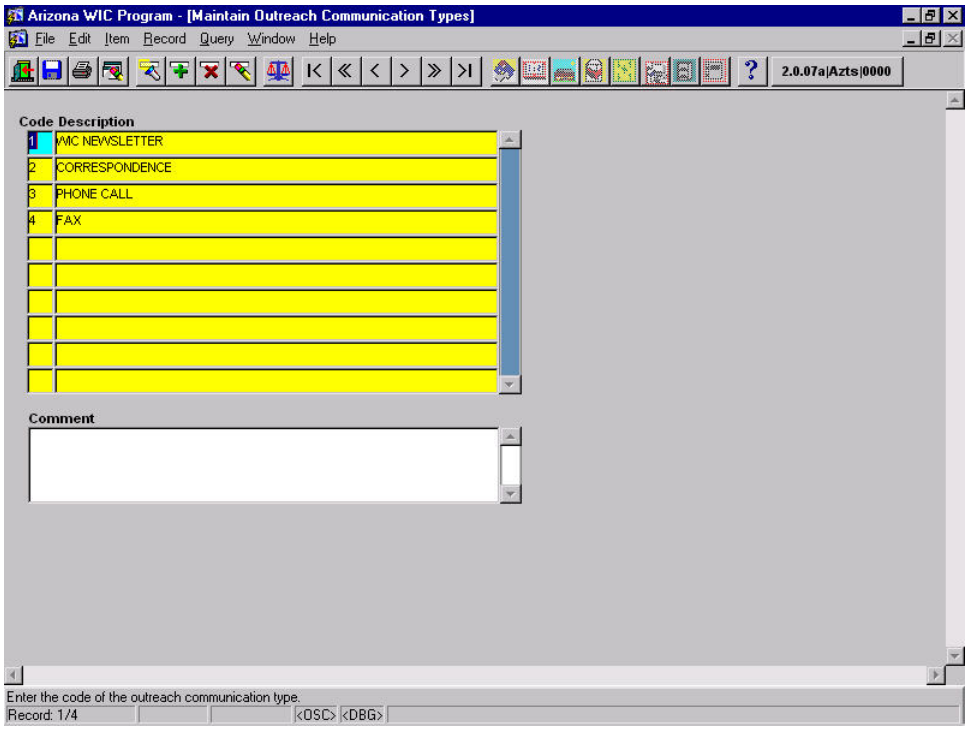

Figure 21 - Maintain Outreach / Referral Communication Types

Fields

Code - Numeric identifier for an outreach / referral communication type. This field is mandatory.
Description - This field is mandatory and is the user-entered description of the corresponding outreach / referral communication type.
Comment - The user may provide any comments or remarks regarding this outreach / referral communication type. This field is optional.

Calculation(s)

None.

Background Process(es)

None.

Operations Management

Section 5 - 2.1.3 : Update Staff Titles

Priority: Required

Window: Maintain Staff Titles

Report: No

FSRD Reference: OM 3

Narrative:

This Window is used to capture and maintain information about staff member titles and their corresponding title categories.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management

Section 5 - 2.1.3.1 : Maintain Staff Titles

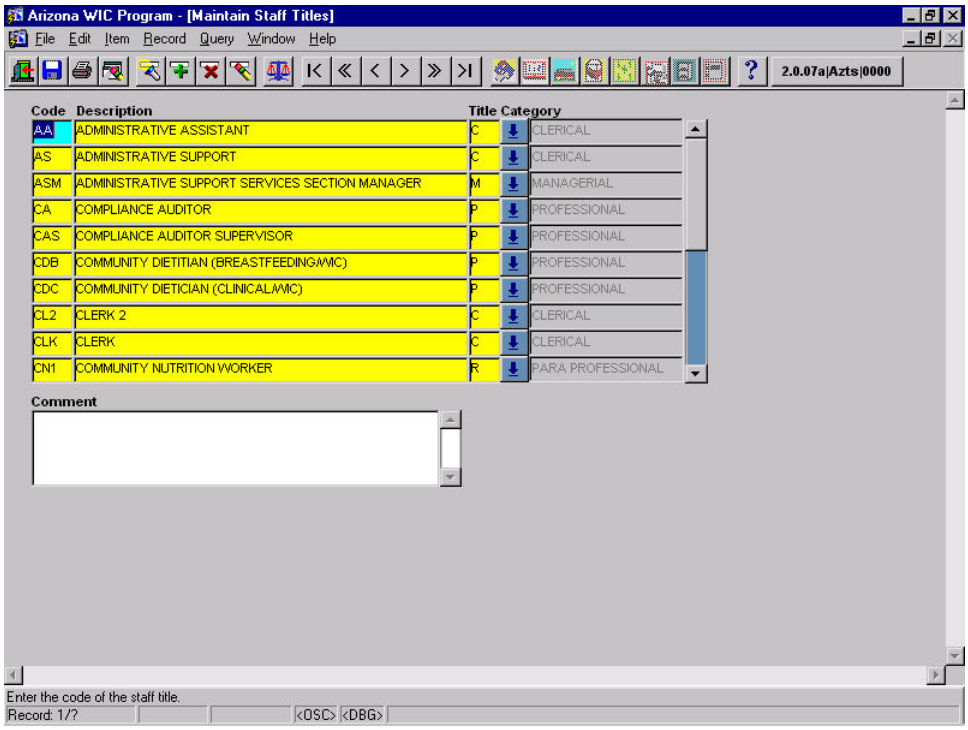

Figure 22 - Maintain Staff Titles

Fields

Code - An alpha-numeric identifier for a staff title. This field is mandatory.
Description - This field is mandatory and is the user-entered description of the corresponding staff title code.
Title - Clicking on this list of values button allows the user to select the appropriate category for the title. For more information, refer to the Maintain Title Categories window. This field is mandatory.
Category - This description defaults from its associated Title Category code. This field is displayed immediately after the user selects the Title. This field is display only.
Comment - The user may provide any comments or remarks concerning this staff title. This field is optional.

Calculation(s)

None.

Background Process(es)

The system populates the category field with the description corresponding to the Title selected.

Operations Management

Section 5 - 2.1.4 : Update Title Categories

Priority: Required

Window: Maintain Title Categories

Report: No

FSRD Reference: OM 3

Narrative:

This Window is used to capture and maintain codes and descriptions for the categories of staff titles.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management

Section 5 - 2.1.4.1 : Maintain Title Categories

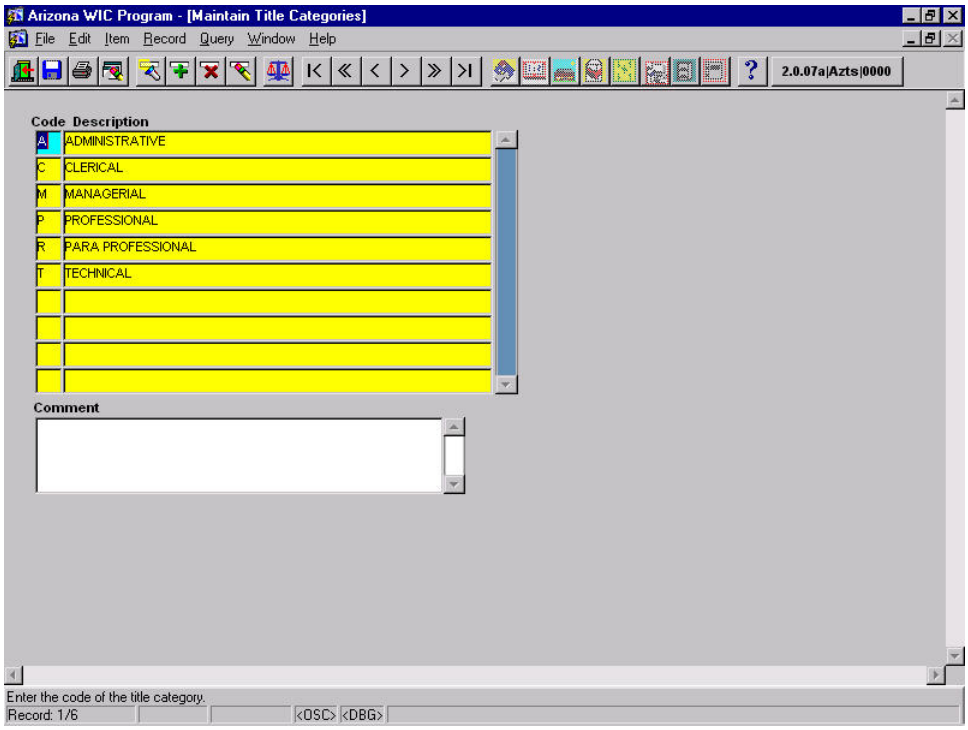

Figure 23 - Maintain Title Categories

Fields

Code - The alpha identifier for a title category. This field is user entered and mandatory.
Description - This field is mandatory and is the user-entered description of the corresponding title category.
Comment - The user may provide any comments or remarks concerning this title category.

Calculation(s)

None.

Background Process(es)

None.

Operations Management

Section 5 - 3 : Outputs

Section 5 - 3.1 : Labels

Section 5 - 3.1.1 : Creating Outreach / Referral Organization Mailing Labels

Priority: Required

Window: Outreach Organization Labels

Report: No

FSRD Reference: OM 4

Narrative:

The purpose of this window/report is to produce mailing labels for Outreach / Referral Organizations. The user can produce labels by selecting Outreach / Referral Organizations based upon: Label Type, Agency, Outreach ID, and Outreach Type.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management, LA Systems Admin., ITS Admin., CSF Manager, CNW1, Nutritionist 1, BF Counselor, Trainer, Special Projects Coordinator, ADHS Viewer

Section 5 - 3.1.1.1 : Outreach Organization Labels Parameter

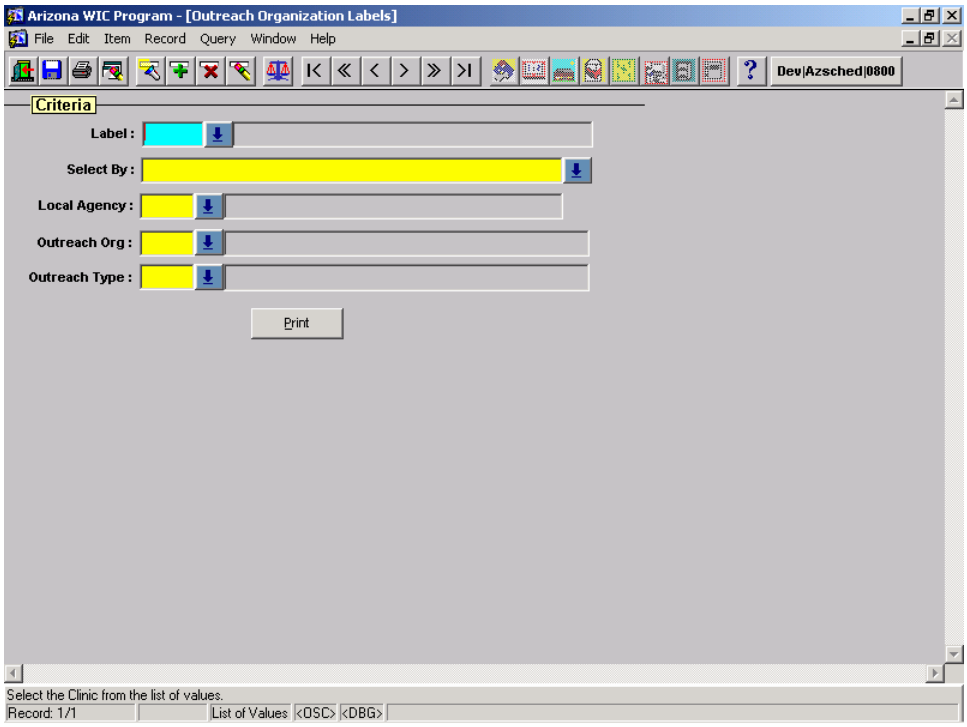

Figure 24 - Outreach Organization Labels Parameter

Fields

Label – Choose from the static list of values. The choices are “5160: Avery HP Label Stock (3x10) (1" x 2 5/8")” or “5163: Avery HP Label Stock (2x5) (2" x 4")”. This field is mandatory.

Select By – Choose from the static list of values. The choices are “LOCAL AGENCY”, “OUTREACH ORG”, or “OUTREACH TYPE”. The value chosen here will determine which of the remaining fields on the screen will be enabled. This field is mandatory.

Local Agency – If “LOCAL AGENCY” is chosen in the Select By field, this field will be enterable and the list of values will display the Local Agency for which Outreach Organization Labels will be printed.

Outreach Org - If “OUTREACH ORG” is chosen in the Select By field, this field will be enterable and the list of values will display the Outreach Organizations for the local agency for which labels can be printed.

Outreach Type - If “OUTREACH TYPE” is chosen in the Select By field, this field will be enterable and the list of values will display the Outreach Organization Types for which labels can be printed.

Push Button(s)

Print – Displays the “Choose Label To Start At” window. Depending on what Label style was chosen in the Label field will determine which “Choose Label To Start At” window will be displayed.

Calculation(s)

None.

Background Process(es)

None.

Section 5 - 3.1.1.2 Outreach/Referral Organization Labels–Choose Label To Start At popup

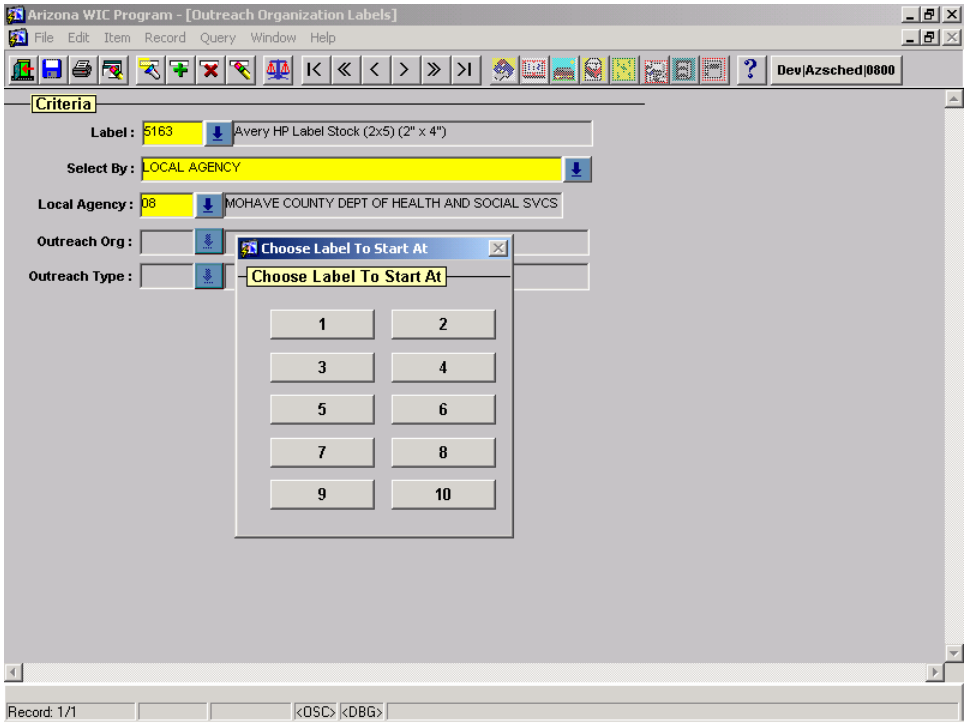

Figure 25 - Outreach / Referral Organization Labels – Choose Label To Start At popup – Label 5163

Fields:

None.

Push Button(s)

1 thru **10** – Press the button which corresponds to the next label in the printer. This will activate the print process.

Section 5 - 3.1.1.3 Outreach/Referral Organization Labels–Choose Label To Start At popup

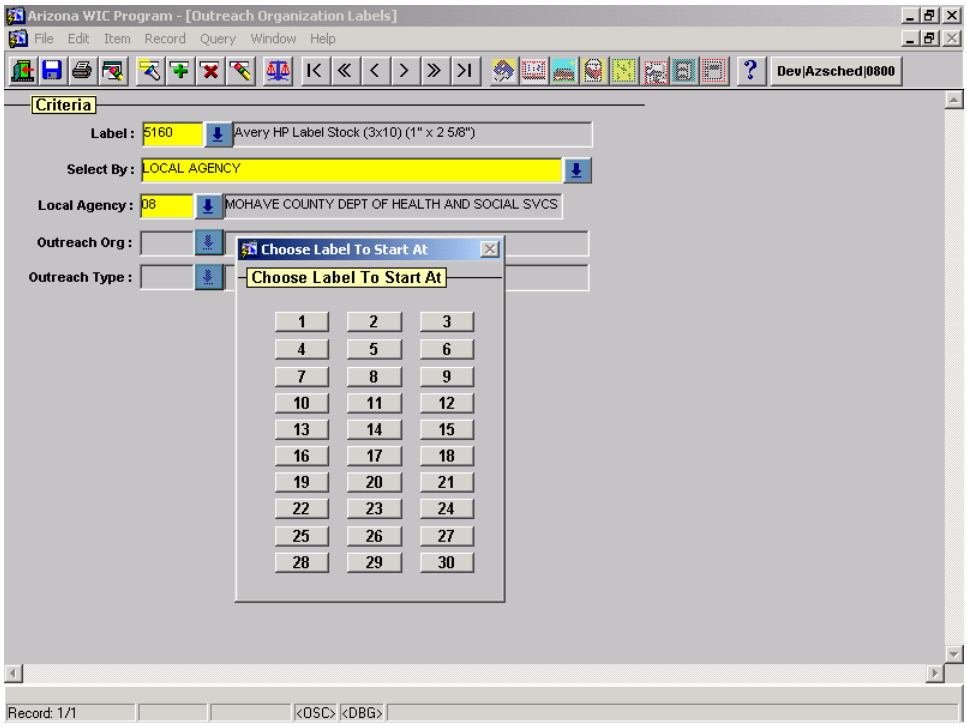

Figure 26 - Outreach / Referral Organization Labels – Choose Label To Start At popup – Label 5160

Fields

None.

Push Button(s)

1 thru **30** – Press the button which corresponds to the next label in the printer. This will activate the print process.

Outreach / Referral Organization Mailing Label

```
XXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXX
XXXXXXXX,  XX  XXXXX-XXXX
Attn: XXXXXXXXXXXXXXX
```

Figure 27 - Outreach / Referral Organization Mailing Label

Organization Location - The user may select the location (city) of the organizational unit for which the Outreach / Referral Organization mailing labels are generated. For more information, refer to the Organizational Units window.
Outreach ID - The user may select the identification number of the Outreach / Referral Organization to have the mailing labels created for. For more information, please refer to the Outreach / Referral Organizations window.
Outreach Type - The user may select the type of Outreach / Referral Organization for which mailing labels are generated. For more information, please refer to the Outreach / Referral Organizations window.

Sort Criteria (Major to Minor):

Outreach / Referral Organization Name (Ascending Order)

Calculation(s)

None.

Background Process(es)

None.

Operations Management

Section 5 - 3.1.2 : Creating Agency Mailing Labels

Priority: Required

Window: Agency Mailing Labels

Report: Yes

FSRD Reference: OM 4

Narrative:

This window/report set produces mailing labels for user selected Local Agencies and Cities.
Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management

Section 5 - 3.1.2.1 : Agency Labels Parameter

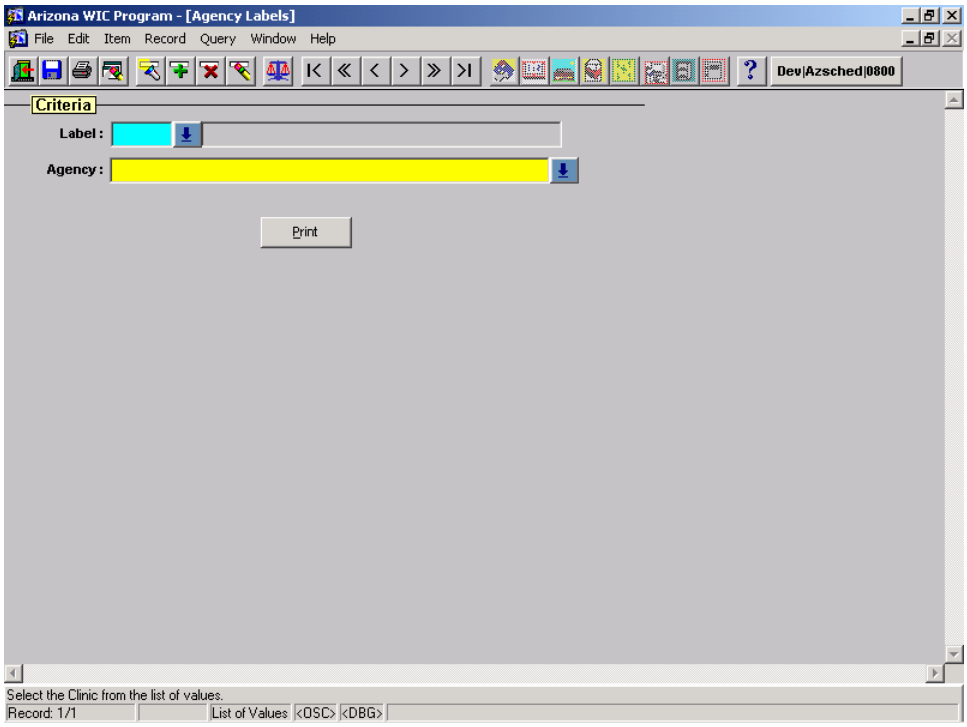

Figure 28 - Agency Labels Parameter

Fields

Label - Choose from the static list of values. The choices are “5160: Avery HP Label Stock (3x10) (1" x 2 5/8")” or “5163: Avery HP Label Stock (2x5) (2" x 4")”. This field is mandatory.

Agency – The Local Agency for which labels will be printed.

Push Button(s)

Print – Displays the “Choose Label To Start At” window. Depending on what Label style was chosen in the Label field will determine which “Choose Label To Start At” window will be displayed.

Calculation(s)

None.

Background Process(es)

None.

Section 5 - 3.1.2.2 : Agency Labels Parameter - Choose Label To Start At popup

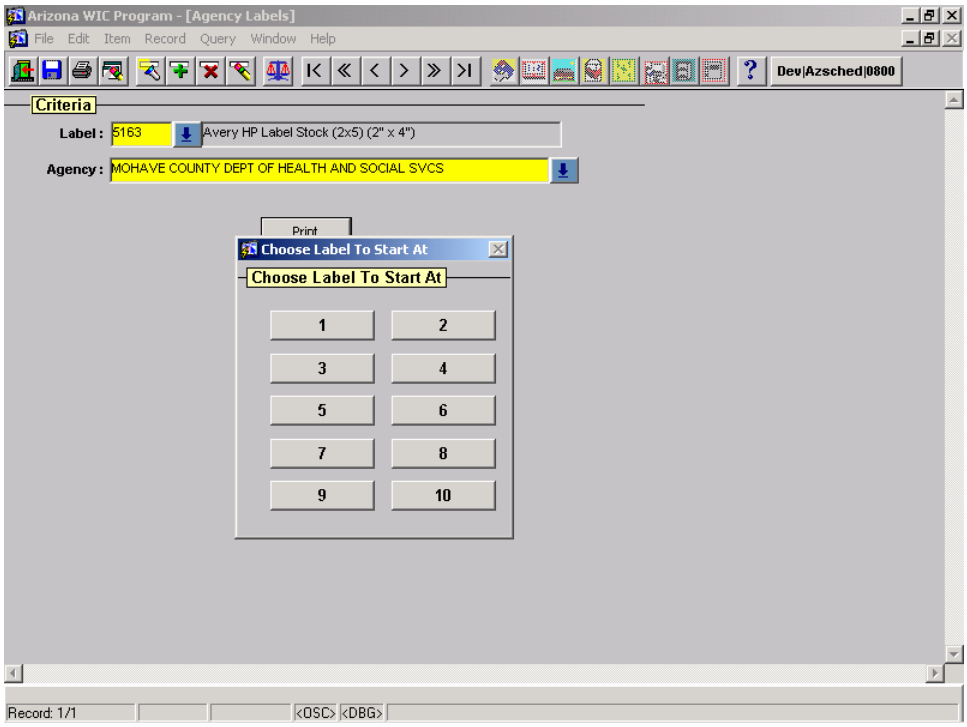

Figure 29 - Agency Labels Parameter – Choose Label To Start At popup – Label 5163

Fields:

None.

Push Button(s)

1 thru **10** – Press the button which corresponds to the next label in the printer. This will activate the print process.

Section 5 - 3.1.2.3 : Agency Labels Parameter - Choose Label To Start At popup

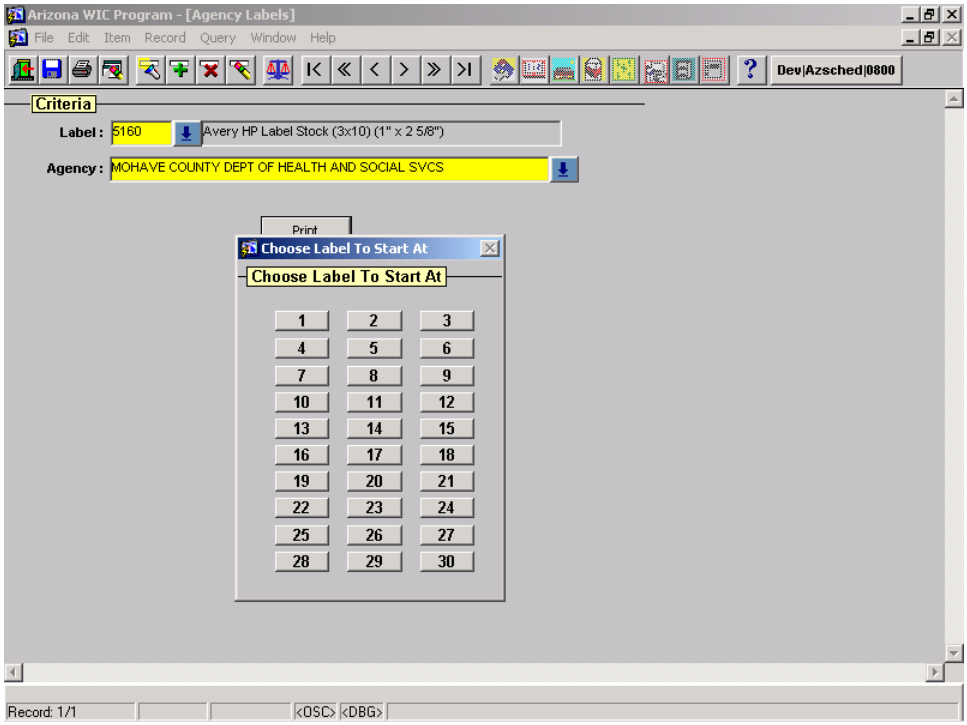

Figure 30 - Agency Labels Parameter – Choose Label To Start At popup – Label 5160

Fields

None.

Push Button(s)

1 thru **30** – Press the button which corresponds to the next label in the printer. This will activate the print process.

Agency Mailing Label

XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXX XXXXXXXX, XX XXXXX-XXXX Attn: XXXXXXXXXXXXXXX

Figure 31 - Agency Mailing Label

Sort Criteria (Major to Minor):

Organizational Unit (Ascending)

Calculation(s)

None.

Background Process(es)

The system allows the user to select the Organizational Unit based upon the Local Agency the user logged into when entering the AIM application. Users entering the State Agency as their Agency code will have access to all agencies in the AIM application.

Operations Management

Section 5 - 3.2 : Reports

Section 5 - 3.2.1 : Producing a Local Agency Directory

Priority: Required

Window: Local Agency Directory

Report: Yes

FSRD Reference: OM 4

Narrative:

The purpose of this window is to allow the user to produce either an internal or external directory of all local agencies and their associated clinics. The internal directory displays the email address, contact name, phone and fax numbers of the clinics. The external report does not.

Data Current As Of: Run Time

Frequency: On Demand

Role(s): Operations Management

Section 5 - 3.2.1.1 : Local Agency Directory Parameter

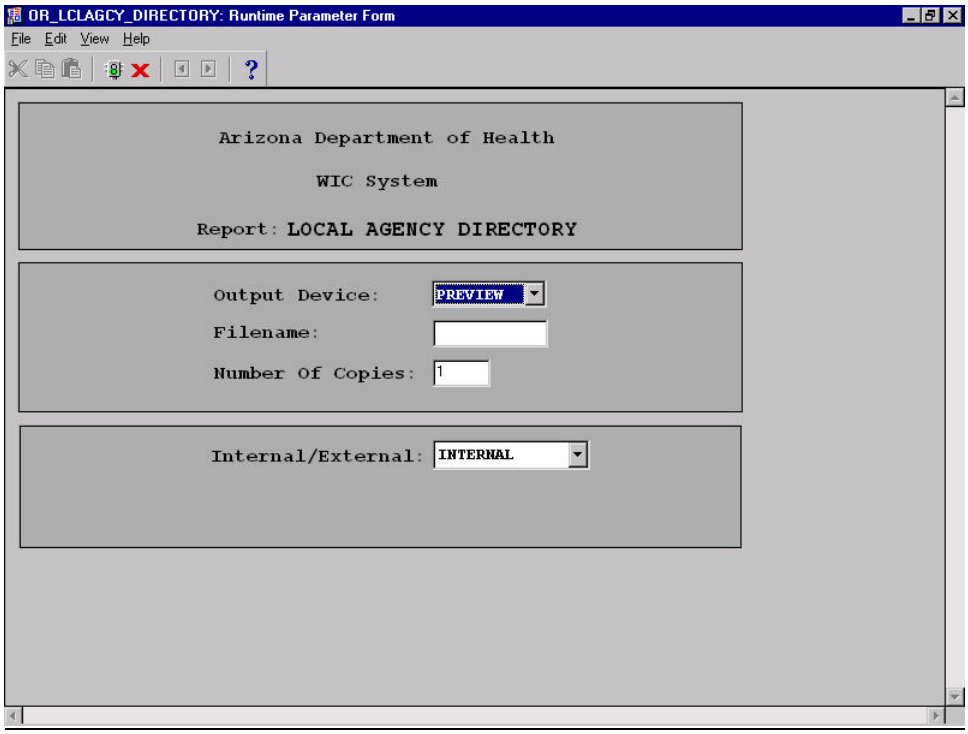

Figure 32 - Local Agency Directory Parameter

Fields

Output Device - The user may select from a drop down list: Preview, Screen, Printer, HTML, RTF or PDF.
Filename - If outputting to a file, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Internal / External - Allows the user to select whether the generated report will be one used for Internal (WIC, CSFP) distribution or External distribution. The user is able to select Internal or External from a preprogrammed domain of values.

Push Button(s)

Run Report - Clicking on this button allows the user to run the report.
Cancel - Clicking on this button cancels the report execution / viewing.

Report Name: XXXXXXXXXX
Report Date: MM/DD/YYYY Page: ZZZ9

Arizona WIC Program
Local Agency Directory
Internal Report

Local Agency & Coordinator	Clinics
XXX XXXXXXXXXXXXXXX	XXX XXXXXXXXXXXXXXX
XXXXXX X. XXXXXXXX, XXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXX XXXXX XXXXX-XXXX Phone: (XXX) XXX-XXXX Fax: (XXX) XXX-XXXX Email: XXXXXXXXXX Days & Hours of Operations: XXXXXXXXXXXX	XXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXX XXX XXXXX XXXXX-XXXX Phone: (XXX) XXX-XXXX Fax: (XXX) XXX-XXXX Email: XXXXXXXXXX Days & Hours of Operations: XXXXXXXXXXXX Contact Name: XXXXXXXXXX, XXXXXXXXXXXXX

Report Name: XXXXXXXXXX
Report Date: MM/DD/YYYY Page: ZZZ9

Arizona WIC Program
Local Agency Directory
External Report

Local Agency & Coordinator	Clinics
XXX XXXXXXXXXXXXXXX	XXX XXXXXXXXXXXXXXX
XXXXXX X. XXXXXXXX, XXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXXXXXXXXXXXXXX XXX XXXXX XXXXX-XXXX Phone: (XXX) XXX-XXXX Fax: (XXX) XXX-XXXX Email: XXXXXXXXXX Days & Hours of Operations: XXXXXXXXXXXX	XXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXX XXX XXXXX XXXXX-XXXX Days & Hours of Operations: XXXXXXXXXXXX
	XXX XXXXXXXXXXXXXXX
	XXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXX XXX XXXXX XXXXX-XXXX Days & Hours of Operations: XXXXXXXXXXXX

Figure 33 - Local Agency Directory Report

Sort Criteria (Major to Minor):

Organizational Unit Code (Ascending)

Calculation(s)

None.

Background Process(es)

The system displays local agency and clinic information for the agency and clinic logged into by the user on the Arizona WIC - [Log On] screen. If the user entered the value of ALL under the Clinic field on the log on screen, this report will display information for all clinics within the selected local agency.

Operations Management

Section 5 - 3.2.2 : Producing a Local Agency Staff Listing

Priority: Required

Window: Local Agency Staff Listing

Report: Yes

FSRD Reference: OM 4

Narrative:

The purpose of this window/report set is to produce a listing of all staff members assigned to a local agency as well as vacant positions. The user can reduce the report generated by selecting a specific program category. The user can select the report to be sorted by: staff title, category or name.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management

Section 5 - 3.2.2.1 : Local Agency Staff Listing Parameter

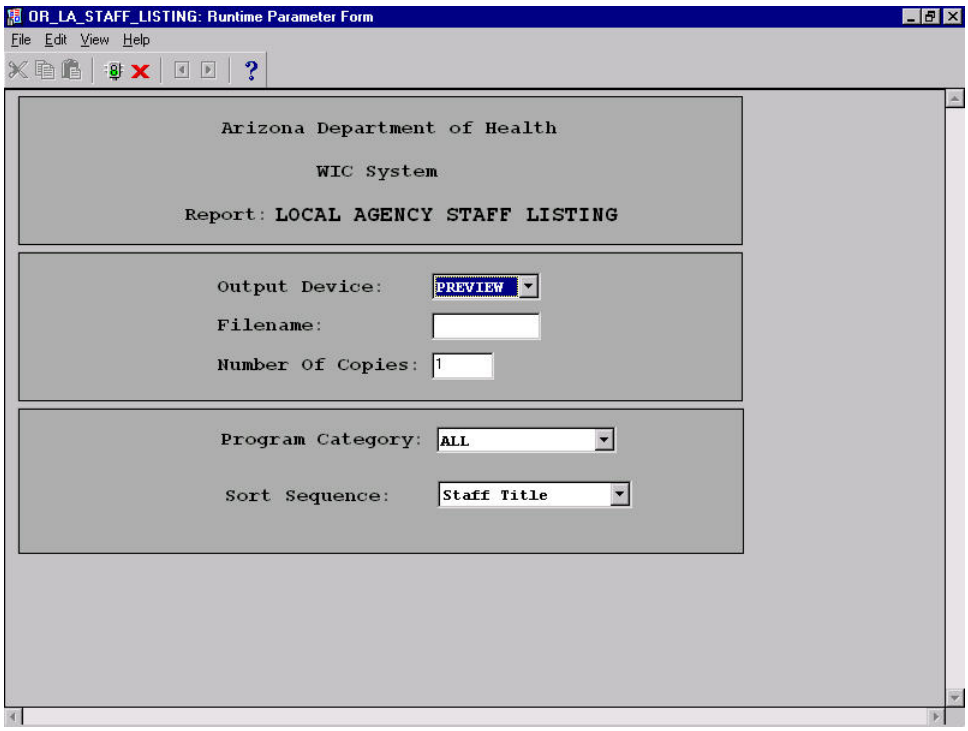

Figure 34 - Local Agency Staff Listing Parameter

Fields

Output Device - The user may select from a drop down list: Preview, Screen, Printer, HTML, RTF or PDF.
Filename - If outputting to a file, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Program Category - Clicking on the list of values button allows the user to select a specific program category for which to generate a local agency staff listing. The values the user can choose from in this list will be identical to those stored in the Program Categories window (i.e., WIC, CSF, Tobacco, Immunization, etc.). For more information, please refer to the Program Categories window.
Sort Sequence - The system stores a domain which allows the user to select the sort of the report to be by: staff title, category, or name.

Push Button(s)

Run Report - Clicking on this button allows the user to run the report.
Cancel - Clicking on this button cancels the report execution / viewing.

Report Name: XXXXXXXXXX
Report Date: MM/DD/YYYY Page: ZZZ9

Arizona WIC Program
Local Agency Staff Listing
Sort Sequence: XXXXXXXX

Program: XXX XXXXXXXXXXXXXX

LA ID	LA Name	Name	Title Category	Title	Program Funding	FT/PT COOP	Hrs/Week	FTE's	Address
XXX	XXXXXXXXX	XXXXXX XXXXX, XXX	XXXXXXXX	XXXXXXXXXXX	XXX	XX	XX	ZZ9.99	XXX
		XXXXXX XXXXX, XXX	XXXXXXXX	XXXXXXXXXXX	XXX	XX	XX	ZZ9.99	XXXXXXXXXXXX
		XXXXXX XXXXX, XXX	XXXXXXXX	XXXXXXXXXXX	XXX	XX	XX	ZZ9.99	XXXXXXXXXXXX
		XXXXXX XXXXX, XXX	XXXXXXXX	XXXXXXXXXXX	XXX	XX	XX	ZZ9.99	XXX XXXXX XXXXX-
		XXXXXX XXXXX, XXX	XXXXXXXX	XXXXXXXXXXX	XXX	XX	XX	ZZ9.99	XXX Phone: (XXX) XXX-XXX Fax: (XXX) XXX-XXX
		Local Agency Coordinator = XXXXXXXXXXXXXXX					Total FTE's:	ZZ9.99	

Figure 35 - Local Agency Staff Listing

Program Category Code (Ascending), then depending upon user selection for the sort:

Three Sort Criteria (Major to Minor):

Staff Title: Organizational Unit Name, Staff Title Description, Staff Member Last Name, Staff Member First Name

Title Category: Organizational Unit Name, Title Category Description, Staff Member Last Name, Staff Member First Name

Staff Name: Organizational Unit Name, Staff Member Last Name, Staff Member First Name

Calculation(s)

The system adds together and totals the FTE's for each Local Agency.

Background Process(es)

The system displays staff listing information for the local agency the user entered in the Arizona WIC [Log On] screen.

Section 5 - 3.2.3 : Producing an Outreach / Referral Organization Listing

Priority: Required

Window: Outreach / Referral Organization Listing

Report: Yes

FSRD Reference: OM 4

Narrative:

The purpose of this window/report set is to produce a general listing of Outreach / Referral Organizations and the program categories for which they provide services.

Data Current As Of: Run Time

Frequency: On Demand

Role(s): Operations Management

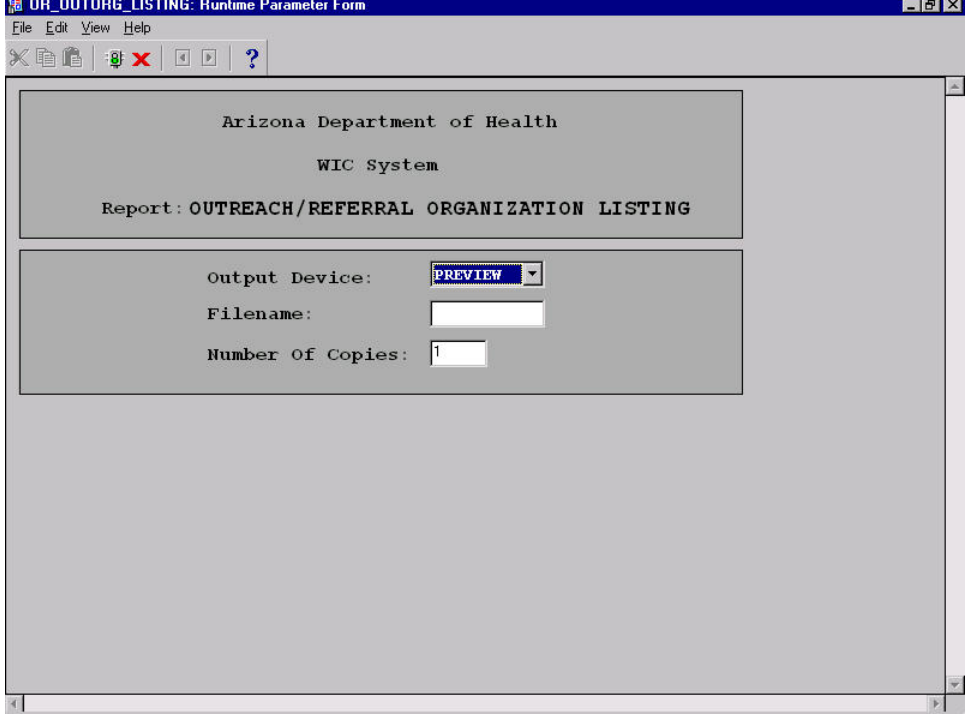

Figure 36 - Outreach / Referral Organization Listing Parameter

Fields

Output Device - The user may select from a drop down list: Preview, Screen, Printer, HTML, RTF or PDF.
Filename - If outputting to a file, the directory and filename are entered.
Number of Copies - Select number of copies to print.

Push Button(s)

Run Report - Clicking on this button allows the user to run the report.
Cancel - Clicking on this button cancels the report execution / viewing.

Local Agency: XX XXXXXXXXXX

Outreach ID	Name	Contact
XXXX	XXXXXXXXXXXXXXXXXXXXXXX	XXXXXXX XXXXXXX
	XXXXXXXXXXXXXXXXXXXXXXX	XXXXXXXXXXX
	XXXXXXXXXXXXXXXXXXXXXXX	Phone: (XXX) XXX-XXXX
	XXXXXXXXXXXXXXXXXXXX	Fax: (XXX) XXX-XXXX
	XXXXXXXX XX XXXXX-XXXX	Email: XXXXXXXXXXXX

Organization Type: XXXXXXXXXXXXXXXXXXXXXXX

Programs: ID	Name
XXXX	XXXXXXXXXXXXXXXXXXXXXXXXXX
XXXX	XXXXXXXXXXXXXXXXXXXXXXXXXX

Communications: ID	Name	DateSent/Called
XXXX	XXXXXXXXXXXXXXXXXXXXXXXXXX	MM/DD/YYYY
XXXX	XXXXXXXXXXXXXXXXXXXXXXXXXX	MM/DD/YYYY

Arizona WIC Program
Outreach/Referral Organization Listing

State Agency: XX XXXXXXXXXX

Outreach ID	Name	Contact
XXXX	XXXXXXXXXXXXXXXXXXXXXXX	XXXXXXX XXXXXXX
	XXXXXXXXXXXXXXXXXXXXXXX	XXXXXXXXXXX
	XXXXXXXXXXXXXXXXXXXXXXX	Phone: (XXX) XXX-XXXX
	XXXXXXXXXXXXXXXXXXXX	Fax: (XXX) XXX-XXXX
	XXXXXXXX XX XXXXX-XXXX	Email: XXXXXXXXXXXX

Organization Type: XXXXXXXXXXXXXXXXXXXXXXX

Programs: ID	Name
XXXX	XXXXXXXXXXXXXXXXXXXXXXXXXX
XXXX	XXXXXXXXXXXXXXXXXXXXXXXXXX

Communications: ID	Name	DateSent/Called
XXXX	XXXXXXXXXXXXXXXXXXXXXXXXXX	MM/DD/YYYY
XXXX	XXXXXXXXXXXXXXXXXXXXXXXXXX	MM/DD/YYYY

Outreach / Referral Organization ID (Ascending)
Program Code (Ascending)
Outreach / Referral Communications Date Sent/Called (Ascending)

Calculation(s)

None.

Background Process(es)

The system displays Outreach / Referral Organization Listing information for the Local Agency the user entered on the Arizona WIC - [Log On] screen.

Section 5 - 3.2.4 : Producing Nutrition Education Contacts Report

Priority: Required

Window: Nutrition Education Contacts

Report: Yes

FSRD Reference: OM 4

Narrative:

Summary report(s) of nutrition education contacts by local agency and/or state agency for a user specified range of dates.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management

tion Contacts Parameter

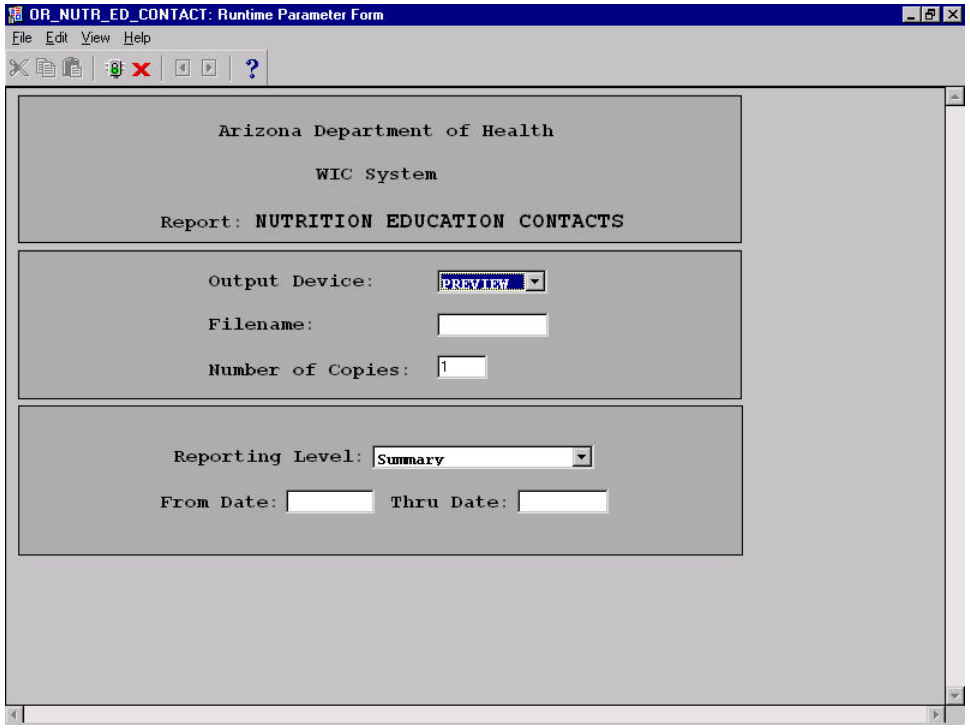

Figure 37 - Nutrition Education Contacts Parameter

Fields

Output Device - The user may select from a drop down list: Preview, Screen, Printer, HTML, RTF or PDF.
Filename - If outputting to a file, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Reporting Level - Gives the user the choice of generating a report by summary or summary and detail. The user can only select the Summary and Detail report level if he/she has entered the State Agency code in the Arizona WIC - [Log On] screen.
From Date - The user may enter the beginning date on which the report will query records falling either on or after this date. This field is mandatory.
Thru Date - The user may enter the ending date on which the report will query records falling either on or before this date. This field is mandatory.

Push Button(s)

Run Report - Clicking on this button allows the user to run the report.
Cancel - Clicking on this button cancels the report execution / viewing.

Sort Criteria (Major to Minor):
Organizational Unit ID (Ascending)
Service ID (Ascending)

Calculation(s)

The system provides counts for the number of participants who attended, missed, or have pending appointments as well as totals by service.

The system provides a sum of all the appointments attended, missed and pending for each Local Agency and a State Agency wrap up (if the user has logged into the State Agency database).

The system adds the Total for Service for each local agency and displays the sum under the Total for Service in the State Agency Summary.

Background Process(es)

The system displays the State Totals Report first when the Summary and Detail reporting level is selected.

State Agency: XX XXXXXXXXXXXXXXX

Service	Nutrition Education Topic	Attendees	Missed	Pending
XXXXXX	XXXXXXXXXXXXXXX	ZZ,ZZ9	ZZ,ZZ9	ZZ,ZZ9
	XXXXXXXXXXXXXXX	ZZ,ZZ9	ZZ,ZZ9	ZZ,ZZ9
	XXXXXXXXXXXXXXX	ZZ,ZZ9	ZZ,ZZ9	ZZ,ZZ9
	Total for Service: XXXXX	ZZZ,ZZ9	ZZZ,ZZ9	ZZ,ZZ9
XXXXXX	XXXXXXXXXXXXXXX	ZZ,ZZ9	ZZ,ZZ9	ZZ,ZZ9
	XXXXXXXXXXXXXXX	ZZ,ZZ9	ZZ,ZZ9	ZZ,ZZ9
	XXXXXXXXXXXXXXX	ZZ,ZZ9	ZZ,ZZ9	ZZ,ZZ9
	Total for Service: XXXXX	ZZZ,ZZ9	ZZZ,ZZ9	ZZ,ZZ9
	State Agency Totals: XXXXX	ZZZ,ZZ9	ZZZ,ZZ9	ZZ,ZZ9

Report Name: XXXXXXXXXX
Report Date: MM/DD/YYYY

Report #: XXXX
Page: ZZZ9

Arizona WIC Program
Nutrition Education Contacts
Summary

Local Agency: XX XXXXXXXXXXXXXXX

Service	Nutrition Education Topic	Attendees	Missed	Pending
XXXXXX	XXXXXXXXXXXXXXX	ZZ,ZZ9	ZZ,ZZ9	ZZ,ZZ9
	XXXXXXXXXXXXXXX	ZZ,ZZ9	ZZ,ZZ9	ZZ,ZZ9
	XXXXXXXXXXXXXXX	ZZ,ZZ9	ZZ,ZZ9	ZZ,ZZ9
	Total for Service: XXXXX	ZZZ,ZZ9	ZZZ,ZZ9	ZZ,ZZ9
XXXXXX	XXXXXXXXXXXXXXX	ZZ,ZZ9	ZZ,ZZ9	ZZ,ZZ9
	XXXXXXXXXXXXXXX	ZZ,ZZ9	ZZ,ZZ9	ZZ,ZZ9
	XXXXXXXXXXXXXXX	ZZ,ZZ9	ZZ,ZZ9	ZZ,ZZ9
	Total for Service: XXXXX	ZZZ,ZZ9	ZZZ,ZZ9	ZZ,ZZ9
	Local Agency Totals: XXXXX	ZZZ,ZZ9	ZZZ,ZZ9	ZZ,ZZ9

Section 5 - 3.2.5 : Producing a Nutrition Education Monitoring Report

Priority: Required

Window: Nutrition Education Monitoring

Report: Yes

FSRD Reference: OM 4

Narrative:

The purpose of this window is to allow the user to generate a report by Local Agency and Clinic of the number of nutrition education contacts for each participant for a user specified range of dates.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management

Nutrition Education Monitoring Parameter

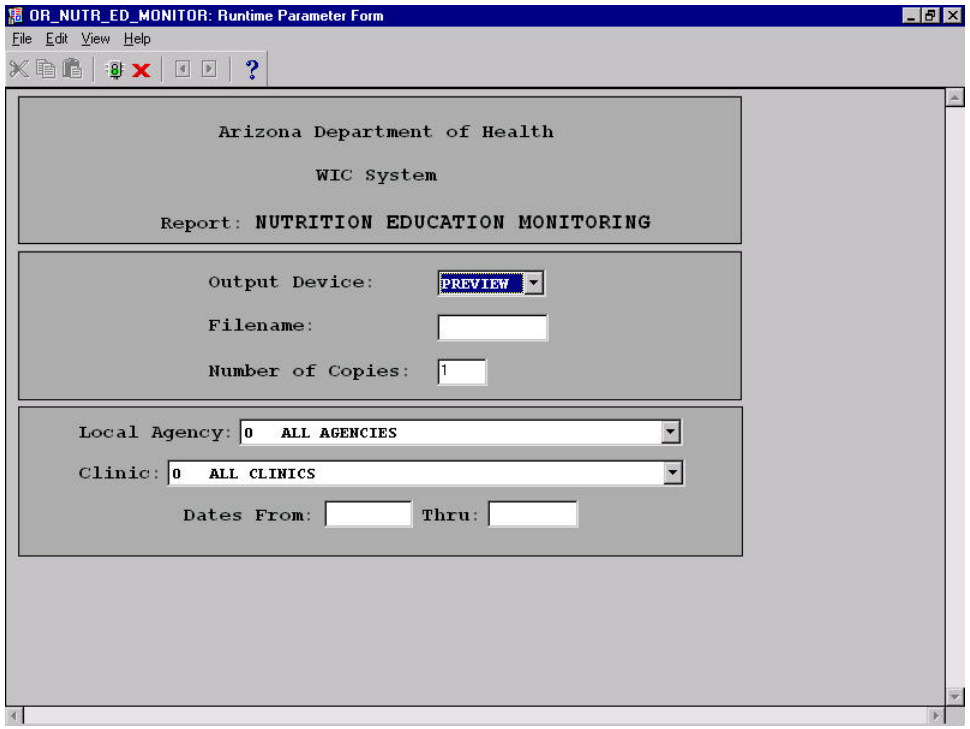

Figure 38 - Nutrition Education Monitoring Parameter

Fields

Output Device - The user may select from a drop down list: Preview, Screen, Printer, HTML, RTF or PDF.
Filename - If outputting to a file, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Local Agency - Clicking on this list of values button allows the user to select one or all agencies to be reported on. For more information, please refer to the Organizational Units window.
Clinic - Clicking on this list of values button allows the user to select one or all clinics to be reported on. For more information, please refer to the Organizational Units window.
Dates From - The user may enter the earliest date that the report will select records on.
Thru - The user may enter the latest date that the report will select records on.

Push Button(s)

Run Report - Clicking on this button allows the user to run the report.
Cancel - Clicking on this button cancels the report execution / viewing.

Participant_ID	Name	# of Nutrition Ed Contacts
XXXXXXXXXX	XXXXXXXXXX, XXXXXXXXXXXXX	XXX
XXXXXXXXXX	XXXXXXXXXX, XXXXXXXXXXXXX	XXX

Organizational Unit ID (Ascending)
# of Nutrition Ed. Contacts (Descending)
Participant Last Name (Ascending)
Participant First Name (Ascending)

Calculation(s)

The system counts and displays the number of nutrition education contacts for a participant whose certification period has ended and has been issued food instruments for all 6 months.

Background Process(es)

The Agencies and Clinics available for selection by the user on the parameter screen are based upon the Local Agency and Clinic codes entered by the user in the Arizona WIC -[Log On] screen.

Section 5 - 3.2.6 : Producing a FNS 648 Local Agency Directory

Priority: Required

Window: FNS 648 Local Agency Directory

Report: Yes

FSRD Reference: OM 4

Narrative:

Produces the FNS 648 Local Agency Directory form for submission to FNS.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management

FNS 648 Local Agency Directory Parameter

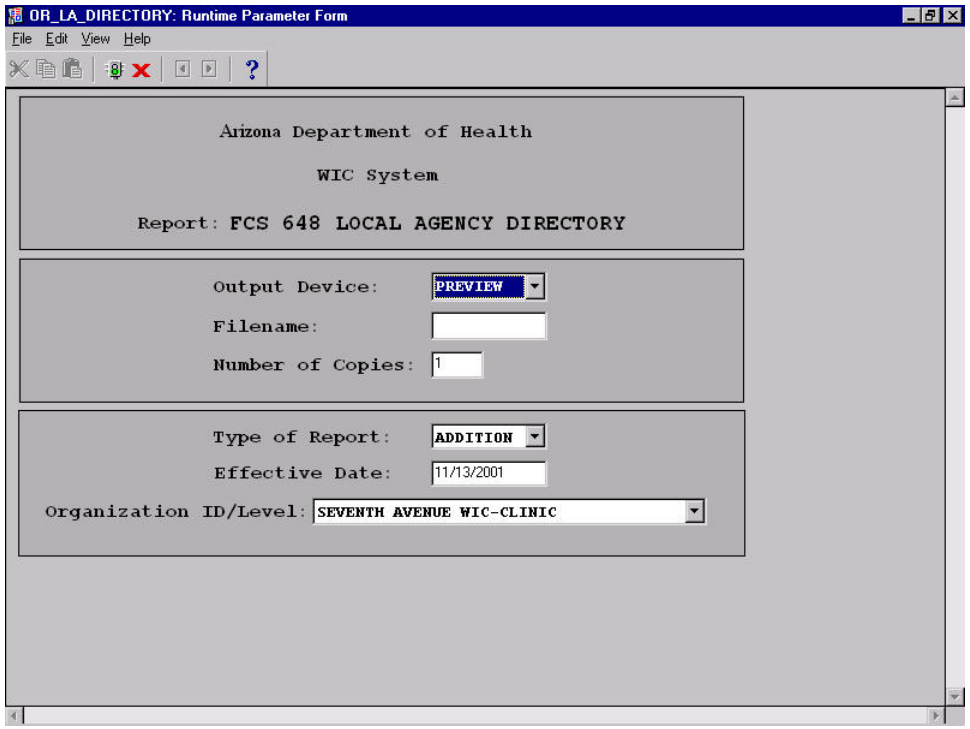

Figure 39 - FNS 648 Local Agency Directory Parameter

Fields

Output Device - The user may select from a drop down list: Preview, Screen, Printer, HTML, RTF or PDF.
Filename - If outputting to a file, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Type of Report - Clicking the list of values allows the user to select the type of report to be sent to the FNS: addition, update, deletion. These values are stored in a preprogrammed domain in the AIM application.
Effective Date - The date that the addition, update or deletion of the Local Agency Directory Information is to become effective. This field is user entered.
Organization ID/Level - Clicking the list of values button allows the user to select the Organizational Unit name and its corresponding level he or she wishes to generate an addition, update or deletion report for. For more information, please refer to the Organizational Units window.

Push Button(s)

Run Report - Clicking on this button allows the user to run the report.
Cancel - Clicking on this button cancels the report execution / viewing.

U.S. DEPARTMENT OF AGRIGULTURE
FOOD AND NUTRITION SERVICE

WIC LOCAL AGENCY DIRECTORY REPORT

TYPE OF REPORT
☐ ADDITION ☐ DELETION ☐ CHANGE

EFFECTIVE DATE MONTH / YR

Public reporting burden for this collection of information is estimated to average .75 hours per response, including the time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information. Send comments regarding this burden estimate or any other aspect of this collection of information, including suggestions for reducing this burden, to the Department of Agriculture, Clearance Officer, OIRM, Room 404 - W. Washington, D.C. 20250; and to the Office of Information and Regulatory Affairs, Office of Management and Budget, Washington, D.C. 20503.

1. STATE

2. 10-DIGIT CODE

3. REPORT

LOCAL AGENCY NAME

ADDRESS

CITY

STATE

ZIPCODE

TELEPHONE NO.

FORM FCS-648: (1-95) Previous editions obsolete.
ORIGINAL-FCS Regional Office

Figure 40 - FNS 648 Local Agency Directory

Sort Criteria (Major to Minor):

Not Applicable

Calculation(s)

None.

Background Process(es)

The Agencies and Clinics available for selection by the user on the parameter screen are based upon the Local Agency and Clinic codes entered by the user in the Arizona WIC -[Log On] screen.

Section 5 - 3.2.7 : Producing a To/From WIC Referrals Report

Priority: Required

Window: To/From WIC Referrals

Report: Yes

FSRD Reference: OM 2.2, OM 4

Narrative:

This report summarizes the monthly referrals by Local Agency to and from Outreach / Referral Organizations. The user specifies a time period of months to report on and the system displays the results within a Local Agency by Outreach / Referral Organization Type and Name.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management

To / From WIC Referrals Parameter

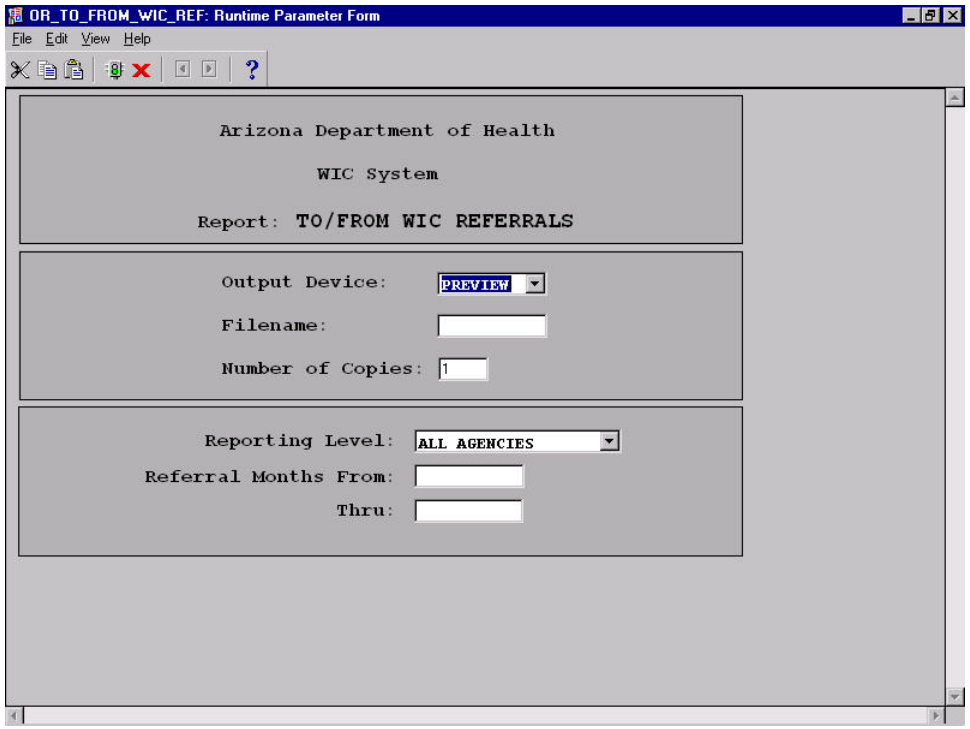

Figure 41 - To / From WIC Referrals Parameter

Fields

Output Device - The user may select from a drop down list: Preview, Screen, Printer, HTML, RTF or PDF.
Filename - If outputting to a file, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Reporting Level - Clicking on the list of values button allows the user to select whether to report on a single or all Local Agencies. For more information, please refer to the Organizational Units window.
Referral Month From - The user may enter the beginning date in MM/YYYY format on which the report will query records falling either on or after this date. This field is mandatory.
Thru - The user may enter the ending date in MM/YYYY format on which the report will query records falling either on or before this date. This field is mandatory.

Push Button(s)

Run Report - Clicking on this button allows the user to run the report.
Cancel - Clicking on this button cancels the report execution / viewing.

Report: XXXXXXXXXXXX
Report Date: MM/DD/YYYY

Report No.: XXXXX
Page ZZZ9

Arizona WIC Program
TO / FROM REFERRALS

Time Period: MM/YYYY - MM/YYYY

Local Agency: XX XXXXXXXXXXXXXXX

	Referrals From	% of Total	Referral To:	% of Total
Outreach / Ref. Org. Type: XXXXXXXXX	ZZZ9	ZZZ9%	ZZZ9	ZZZ9%
Outreach / Ref. Org. Name: XXXXXXXXXXXXXX	ZZZ9	ZZZ9%	ZZZ9	ZZZ9%
XXXXXXXXXXXXXX	ZZZ9	ZZZ9%	ZZZ9	ZZZ9%
Outreach / Ref. Org. Type:XXXX XXXXX	ZZZ9	ZZZ9%	ZZZ9	ZZZ9%
Outreach / Ref. Org. Name: XXXXXXXXXXXXXX	ZZZ9	ZZZ9%	ZZZ9	ZZZ9%
XXXXXXXXXXXXXX	ZZZ9	ZZZ9%	ZZZ9	ZZZ9%
XXXXXXXXXXXXXX	ZZZ9	ZZZ9%	ZZZ9	ZZZ9%
XXXXXXXXXXXXXX	ZZZ9	ZZZ9%	ZZZ9	ZZZ9%
Total:	ZZZ9	ZZZ9%	ZZZ9	ZZZ9%

Organizational Unit (Ascending)
Outreach / Referral Organization Type (Ascending)
Outreach / Referral Organization ID (Ascending)

Calculation(s)

The system provides a count of all the referrals from an Outreach / Referral Organization to the Local Agency.
The system provides a count of all the referrals from the Local Agency to each Outreach / Referral Organization.
The system provides a sum by Type of all the referrals from Outreach / Referral Organizations to the Local Agency.
The system provides a sum of all the referrals from the Local Agency to Outreach / Referral Organizations by Type.
The system sums all the referrals from/to the Outreach / Referral Organizations associated with the Local Agency (regardless of Outreach / Referral Organization Type) and displays the totals at the bottom of the report.
The system provides a percentage of the total referrals from and to for each Outreach / Referral Organization by dividing the total by the from or thru values and then multiplying by 100.
The system provides a percentage of the total referral from and to for each outreach organization type by dividing the total by the from or thru values in the Outreach / Referral Organization Type row, and then multiplying by 100.
The value in the % of total column fields in the Total row should always be 100%.

Background Process(es)

The Agencies available for selection by the user on the parameter screen is based upon the Agency code entered by the user in the Arizona WIC -[Log On] screen.

Section 5 - 3.2.8 : Producing a Food Instrument Usage Report

Priority: Required

Window: Food Instrument Usage Parameter

Report: Yes

FSRD Reference: OM 4, FM 8.2

Narrative:

This window produces a report listing the number of food instruments with each type of disposition by local and state agency with a date range entered by the user on the parameter screen. Each voided disposition is listed separately with a total for all voided types. This report also appears in the Financial Management module under the same name.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management, Financial Management

Food Instrument Usage Parameter

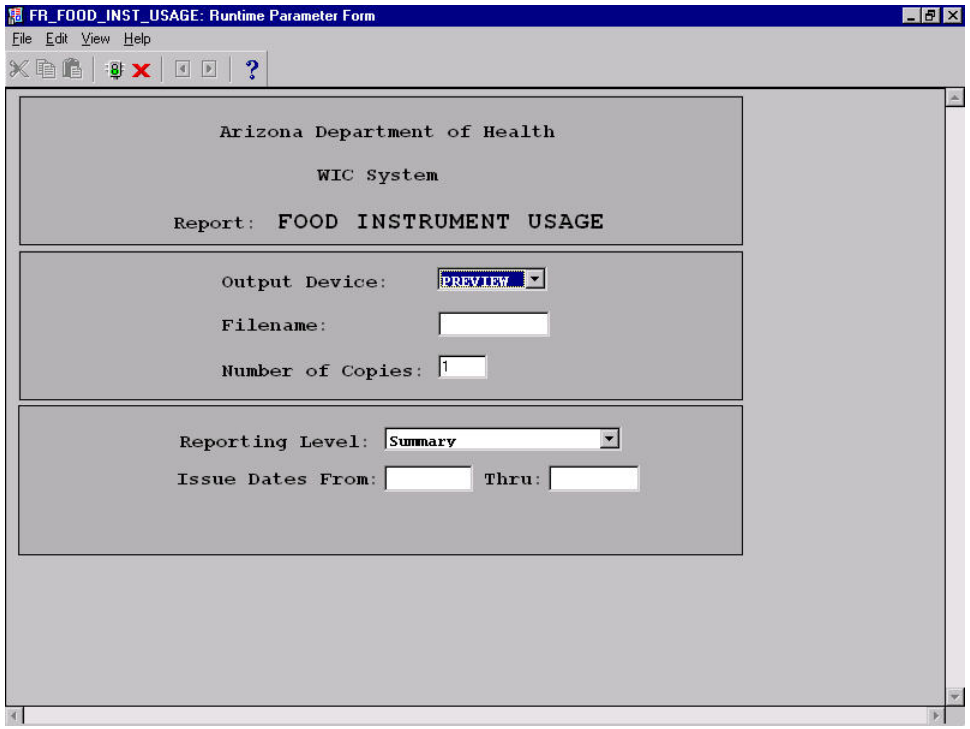

Figure 42 - Food Instrument Usage Parameter

Fields

Output Device - The user may select from a drop down list: Preview, Screen, Printer, HTML, RTF or PDF.
Filename - If outputting to a file, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Reporting Level- This report can be produced with detail and summary information or summary information only. This field is required.
Issue Date From - The user may designate the earliest date that the report is to be queried on. This field is required.
Thru - The user may designate the latest date that the report is to be queried on. This field is required.

Push Button(s)

Run Report - Clicking on this button allows the user to run the report.
Cancel - Clicking on this button cancels the report execution / viewing.

Report: XXXXXXXXXXXX
Report Date: MM/DD/YYYY

Arizona WIC Program
Food Instrument Usage
Summary and Detail

Report No. XXXXX
Page: ZZZ9

Issue Dates From: MM/DD/YYYY Thru:MM/DD/YYYY

State Agency: XX XXXXXXXXXXXXXXX

Food Instrument Disposition	Count
XXXXXXXXXXXXXXX	ZZZZ9
XXXXXXXXXXXXXXX	ZZZZ9
XXXXXXXXXXXXXXX	ZZZZ9
XXXXXXXXXXXXXXX	ZZZZ9
XXXXXXXXXXXXXXX	ZZZZ9

State Agency Totals:

Printed	Printed, Not Issued	Issued	Voided	Rejected	Redeemed	Outstanding
ZZZ,ZZ9	ZZZ,ZZ9	ZZZ,ZZ9	ZZZ,ZZ9	ZZZ,ZZ9	ZZZ,ZZ9	ZZZ,ZZ9

Report: XXXXXXXXXXXX
Report Date: MM/DD/YYYY

Arizona WIC Program
Food Instrument Usage
Summary

Report No. XXXXX
Page: ZZZ9

Issue Dates From: MM/DD/YYYY Thru:MM/DD/YYYY

Local Agency: XX XXXXXXXXXXXXXXX

Food Instrument Disposition	Count
XXXXXXXXXXXXXXX	ZZZZ9
XXXXXXXXXXXXXXX	ZZZZ9
XXXXXXXXXXXXXXX	ZZZZ9
XXXXXXXXXXXXXXX	ZZZZ9
XXXXXXXXXXXXXXX	ZZZZ9

Local Agency Totals:

Printed	Printed,Not Issued	Issued	Voided	Rejected	Redeemed	Outstanding
ZZZ,ZZ9	ZZZ,ZZ9	ZZZ,ZZ9	ZZZ,ZZ9	ZZZ,ZZ9	ZZZ,ZZ9	ZZZ,ZZ9

Sort Criteria (Major to Minor):

Food Instrument Disposition (Ascending)

Calculation(s)

Count - Count (FI Disposition)
Printed - Count(FI's)

Count(FI's voided)
Rejected - Count(FI's rejected)
Redeemed - Count(FI's redeemed)
Outstanding - Issued - (Voided + Rejected + Redeemed)

Background Process(es)

The Agencies available for selection by the user on the parameter screen are based upon the Agency code entered by the user in the Arizona WIC -[Log On] screen.

Section 5 - 3.2.9 : Producing a Participant Status Report

Priority: Require

Window: WIC Participant Status Report Parameter, CSF Participant Status Report Parameter

Report: Yes

FSRD Reference: OM 4, FM 8.1

Narrative:

An on demand report of selected characteristics of the WIC or CSF participant population used to measure changes and trends for predicting caseload patterns. Selected data from the Participant Processing System is required. This report also appears in the Financial Management module under the same name.

Sort Criteria (Major to Minor):

(Part 1) Organizational Unit Code (Ascending)
(Part 2) Client ID (Ascending)
(Part 3) Termination Reason Description (Ascending)

Data Current As Of: Run Time

Frequency: On Demand

Role(s): Operations Management, Financial Management

WIC Participant Status Parameter

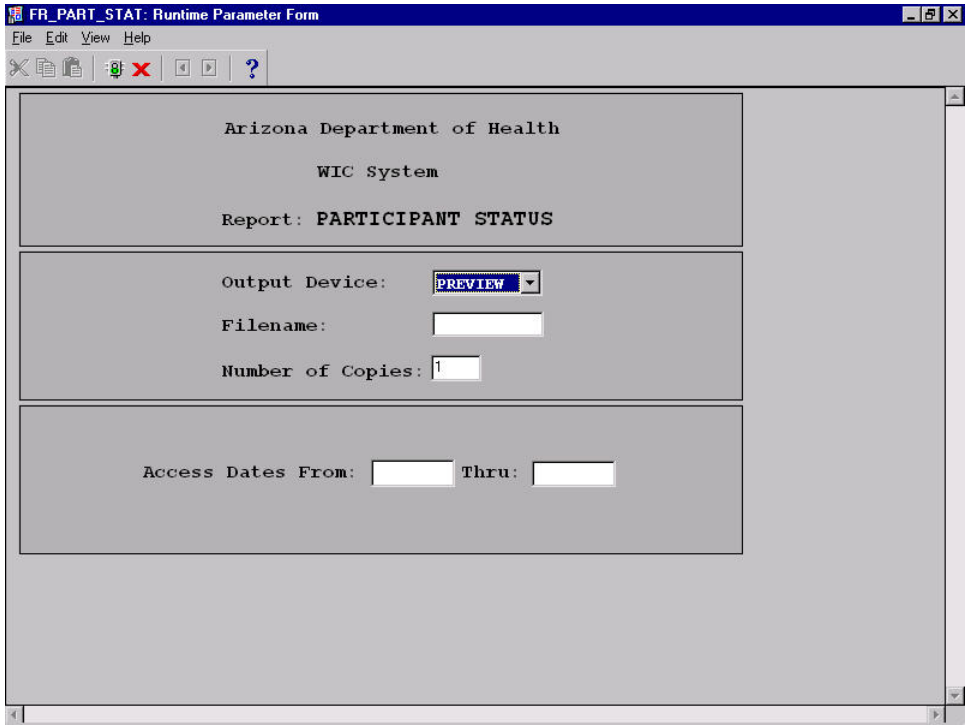

Figure 43 - WIC Participant Status Initiation Window

Fields

Output Device - The user may select from a drop down list: Preview, Screen, Printer, HTML, RTF or PDF.
Filename - If outputting to a file, the directory and filename are entered.
Number of Copies - If printer is selected (above) the number of copies desired is entered. This field is optional.
Access Dates From Thru - The range of dates upon which the report will filter data, excluding information not falling within the specified range. These fields are required.

Push Button(s)

Run Report - This field will have focus when this window is called. The report will be run if either the button is clicked with the mouse or the enter key is stroked.
Cancel - Returns user to main menu without producing the report.

Report Name: XXXXX
Report: DD/MM/YYYY

Arizona WIC Program
PARTICIPANT STATUS
Access Dates From: MM/YYYY Thru: MM/YYYY

Report No: XXXX
Page ZZZ9

Local Agency: XX XXXXXXXXXXXXXXXXXXXXX Clinic: XX XXXXXXXXXXXXXXXXXXXXXXXXXXXX

# Enrolled	# Wait Listed (by Priority) P1	P2	P3	P4	P5	P6	P7	# Actual Participants	# Certified With EDC	# Children 5 Years To Become Ineligible	# Breastfeeding Women To Become Ineligible	# Postpartum Women To Become Ineligible
ZZZZZ9	***	Z9	Z9	Z9	Z9	Z9	Z9	ZZZ9	ZZZ9	ZZZ9	ZZZ9	ZZZ9

#(I) - (C) Category Transfers	# of (I) Fully Breast Fed	# Participants Disqualified	# Participants Terminated Other Than Category Ineligible	# New Applicants Certfied	# of Recertified Participants	Out of State Adds	# Infants 4th Month	# of Infants 6th Month	# Children on Formula (3A1)
ZZZZ9	ZZZZ9	ZZZZ9	ZZZZ9	ZZZZ9	ZZZZ9	ZZZZ9	ZZZZ9	ZZZZ9	ZZZZ9

Participants Terminated for Reasons Other Than Categorical Ineligibility

Client ID	Name	Reason
ZZZZZZ9	XXXXXXXXXX XXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
ZZZZZZ9	XXXXXXXXXX XXXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Participant Termination/Ineligibility Totals:

Reason:	Count:
XXXXXXXXXXXXXXXXXXX	ZZZZZ9
XXXXXXXXXXXXXXXXXXX	ZZZZZ9

Calculations:

 # Enrolled COUNT (CERTIFICATION_CERT_START_DATE)
 # Wait Listed P1...P7 - COUNT(Wait_List_Flag)
 # Actual Particip - COUNT(Issuance Participation)
 # Cert (P) With EDC - COUNT(Category)
 # Children 5 Years To become Ineligible - COUNT(Termination_Date)
 # Breastfeeding Women To become Ineligible - COUNT(Termination_Date)
 # Postpartum Women To become Ineligible - COUNT(Termination_Date)
 # (I) - (C) Category Transfers - COUNT(Categories)
 # (I) Fully Breastfed - COUNT(BF_Pattern)
Participants Disqualified - COUNT(Term_Reason)
Participant Terminated Other Than Category Ineligible - COUNT(Termination_Date)
 # Part Term Other Than Catg Inelig - COUNT(Term_Reason)
 # New Certs - COUNT(Certification = 1)
 # Recerts - COUNT(Certification > 1)
Out of State Adds - COUNT(Certification)
 # Infants 4th Month - COUNT(Birthdate)
 # Infants 6th Month - COUNT(Birthdate)
 # Children on Formula(3A1) - COUNT(priority 3a1)

Background Processes:

The Agencies and Clinics available for selection by the user on the parameter screen are based upon the Local Agency and Clinic codes entered by the user in the Arizona WIC -[Log On] screen.

CSF Participant Status Parameter

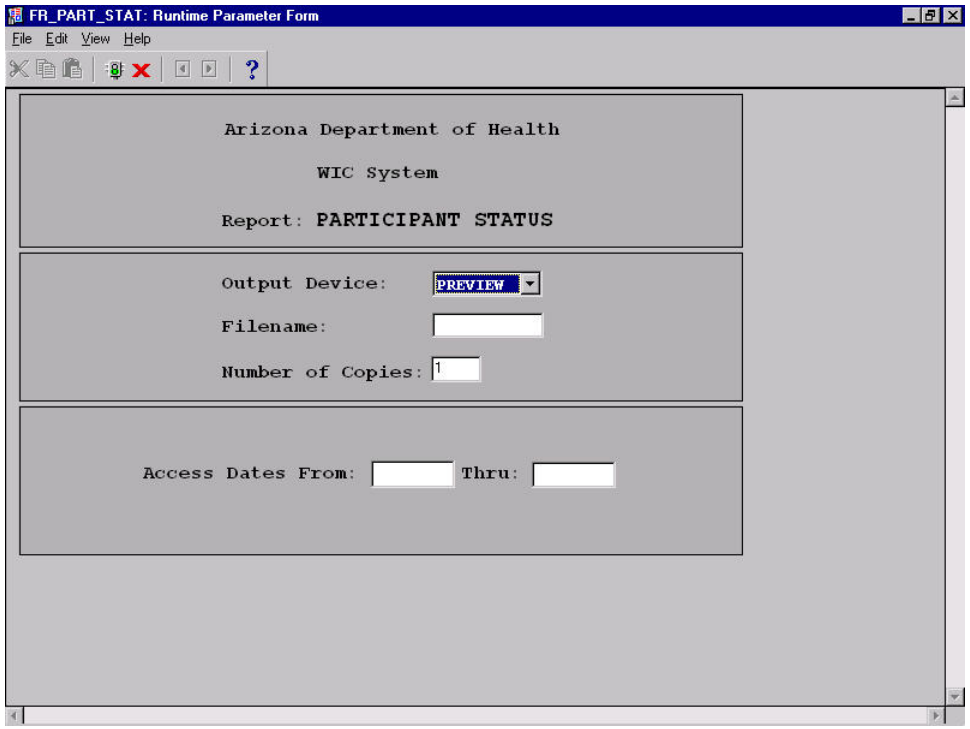

Figure 44 - CSF Participant Status

Fields

Output Device - The user may select from a drop down list: Preview, Screen, Printer, HTML, RTF or PDF.
Filename - If outputting to a file, the directory and filename are entered.
Number of Copies - If printer is selected (above) the number of copies desired is entered. This field is optional.
Access Dates From Thru - The range of dates upon which the report will filter data, excluding information not falling within the specified range. These fields are required.

Push Button(s)

Run Report - This field will have focus when this window is called. The report will be run if either the button is clicked with the mouse or the enter key is stroked.
Cancel - Returns user to main menu without producing the report.

Local Agency:	XX	XXXXXXXXXXXXXXXX	Clinic:	XX	XXXXXXXXXXXXXXXXXXXXX

# Enrolled	# Wait Listed By Priority P1	P2	P3	P4	P5	P6	P7	# Actual Participants	# Certified With EDC	# Children 6 Years To Become Ineligible
_____	___	___	___	___	___	___	___	_____	_____	_____
ZZZ9	***	Z9	Z9	Z9	Z9	Z9	Z9	ZZZ9	ZZZ9	ZZZ9

# Breastfeeding Women to Become Ineligible	# Postpartum Women to Become Ineligible	# Participants Terminated Other Than Category Ineligible	# New Applicants Certified	# of Recertified Participants	Out of State Adds
_____	_____	_____	_____	_____	_____
ZZZ9	ZZZ9	ZZZ9	ZZZ9	ZZZ9	ZZZ9

Participants Terminated for Reasons Other Than Categorical Ineligibility

Client ID	Name:	Reason:
ZZZZZZ9	XXXXXXXXXX XXXXXXXXXXXX	XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX
ZZZZZZ9	XXXXXXXXXX XXXXXXXXXXXX	XXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX

Participant Termination/Ineligibility Totals:

Reason:	Count:
XXXXXXXXXXXXXXXXXX	ZZZZZ9

Figure 45 - CSF Participant Status Report

Calculations:

 # Enrolled - COUNT (CERTIFICATION_CERT_START_DATE)
 # Wait Listed P1...P7 - COUNT(Wait_List_Flag)
 # Actual Particip - COUNT(Issuance Participation)
 # Cert (P) With EDC - COUNT(Category)
 # Children 6 Years To become Ineligible - COUNT(Termination_Date)
 # Breastfeeding Women To become Ineligible - COUNT(Termination_Date)
 # Postpartum Women To become Ineligible - COUNT(Termination_Date)
Participant Terminated Other Than Category Ineligible - COUNT(Termination_Date)
 # New Applicants Certified - COUNT(Certification = 1)
# of Recertified Participants - COUNT(Certification > 1)
Out of State Adds - COUNT(Certification)

Background Processes:

The Agencies and Clinics available for selection by the user on the parameter screen are based upon the Local Agency and Clinic codes entered by the user in the Arizona WIC -[Log On] screen.

Section 5 - 3.2.10 : Producing a Time Study Summary Report

Priority: Required

Window: Time Study Summary

Report: Yes

FSRD Reference: Not in last version. Will be in Section OM 4.

Narrative:

This report allows the user to produce a summary report of the number of hours spent by an employee performing various activities on each day.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management

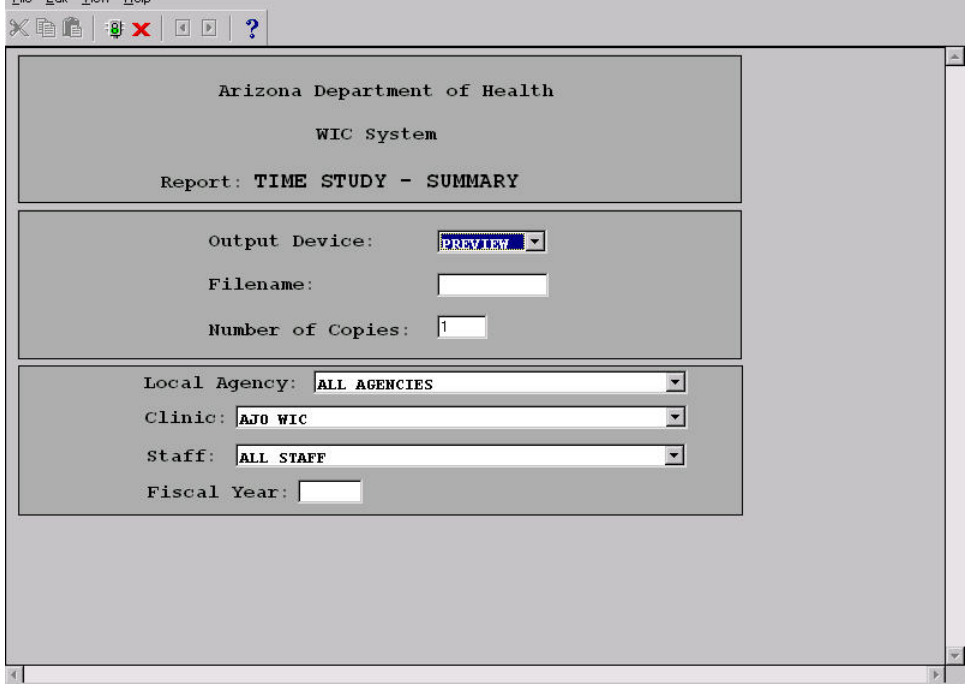

Figure 46 - Time Study Summary Parameter

Fields

Output Device - The user may select from a drop down list: Preview, Screen, Printer, HTML, RTF or PDF.
Filename - If outputting to a file, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Local Agency - Clicking on the list of values button allows the user to select whether to report on a single or all Local Agencies. For more information, please refer to the Organizational Units window.
Clinic - Clicking on the list of values button allows the user to select whether to report on a single or all clinics within the local agency selected. For more information, please refer to the Organizational Units window.
Staff - Clicking on the list of values button allows the user to select all staff or a specific staff member at a local agency for which to produce a summary Time Study report. The list displays the Staff ID, Last Name, First Name, MI1 and MI2 for each staff member. For more information, please refer to the Participant Registration window in Enrollment and Certification.
Fiscal Year - Four digit user entered year for which to generate the report. The user only needs to enter the year and not the month because Arizona will only conduct the Time Study during a single month in each year.

Run Report - Clicking on this button allows the user to run the report.
Cancel - Clicking on this button cancels the report execution / viewing.

Report Name: XXXXXXXXX
Report Date: MM/DD/YYYY

Report No. XXXXX
Page: ZZZ9

Arizona WIC Program
Time Study - Summary
Fiscal Year: XXXX

Local Agency: XX XXXXXXXXXXXX

Clinic: XX XXXXXXXXXXXXXXXX

Employee Name: XXXXXXXXXX, XXXXXXXXXX

WIC Position / Title: XXXXXXXXXXXXX

HOURS SPENT ON WIC ACTIVITIES/MONTH

Date	Part. Services	Nutrition Education	Breast Feeding	Administration	Immunization	CSFP	Tobacco	Other
XXXXXX	XXXXXXXX	XXXXX	XXXX	XXXXXXXX	XXXXXXX	XXX	XXXXX	XXXX
XXXXXX	XXXXXXXX	XXXXX	XXXX	XXXXXXXX	XXXXXXX	XXX	XXXXX	XXXX
XXXXXX	XXXXXXXX	XXXXX	XXXX	XXXXXXXX	XXXXXXX	XXX	XXXXX	XXXX
Monthly Totals:	XXXXXXXX	XXXXX	XXXX	XXXXXXX	XXXXXXX	XXX	XXXX	XXXX

Organizational Unit (Ascending)
Staff Member Last Name (Ascending)
Staff Member First Name (Ascending)
Calendar Date (Ascending)

Calculation(s)

The system counts the number of hours entered by the staff member in the Time Study - Daily Log window that he/she worked in the performance of duties in each of the Activity columns, and displays each count in the field corresponding to the appropriate date. This allows the user to view the amount of time spent by the employee performing an activity (i.e., Participant Services) for a single date.

The system totals the number of hours displayed that the staff member worked in the performance of duties in each of the Activity columns and displays the total in the appropriate field in the Monthly Totals row. This allows the user to view the amount of time spent by the employee performing an activity (i.e., Nutrition Education) for the month the Time Study was conducted for the Fiscal year.

Background Process(es)

The Agencies available for selection by the user on the parameter screen is based upon the Agency code entered by the user in the Arizona WIC -[Log On] screen.

Section 5 - 3.2.11 : Producing a Personnel Costs Summary Report

Priority: Required

Window: Personnel Costs Summary

Report: Yes

FSRD Reference: Not in last version. Will be in Section OM 4.

Narrative:

This allows the user to generate a report detailing the personnel costs for each staff member at a clinic based upon the user selected Activity category.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management

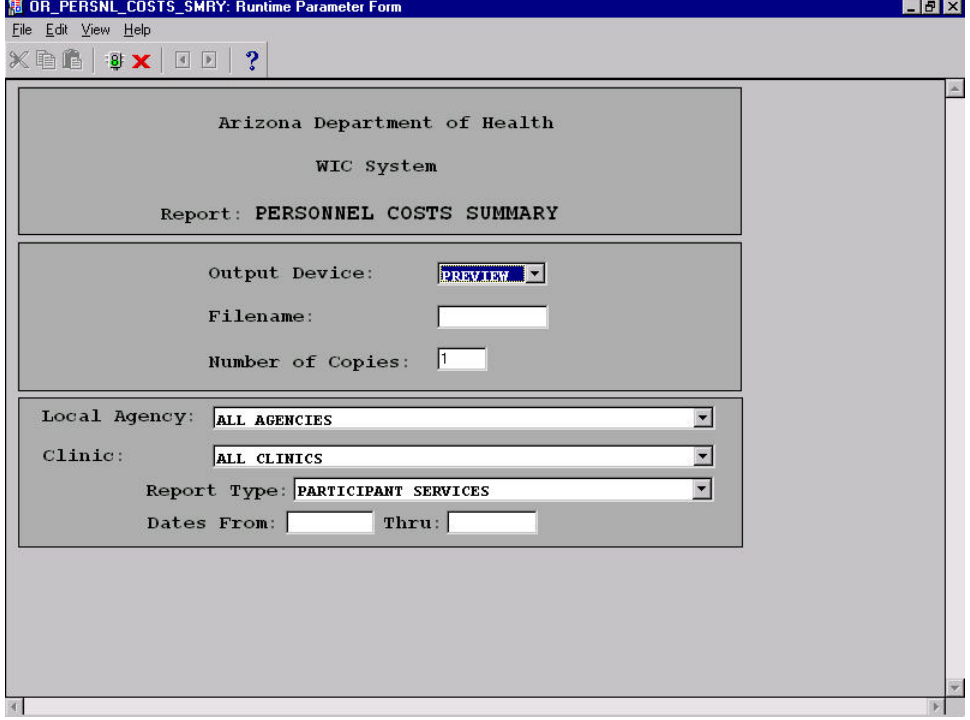

Figure 47 - Personnel Costs Summary Parameter

Fields

Output Device - The user may select from a drop down list: Preview, Screen, Printer, HTML, RTF or PDF.
Filename - If outputting to a file, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Local Agency - Clicking on the list of values button allows the user to select whether to report on a single or all Local Agencies. For more information, please refer to the Organizational Units window.
Clinic - Clicking on the list of values button allows the user to select whether to report on a single or all clinics within the local agency selected. For more information, please refer to the Organizational Units window.
Report Type - Clicking on the list of values button allows the user to select the Activity category to report. The user selects from the following list of values stored in a preprogrammed domain: Participant Services, Nutrition Education, Breastfeeding, Administration, Immunization, CSFP, Tobacco or Other.
Dates From - The user may designate the first date that the query is to report on. This field is required.
Thru - The user may designate the last date that the query is to report on. This field is required.

Push Button(s)

Run Report - Clicking on this button allows the user to run the report.
Cancel - Clicking on this button cancels the report execution / viewing.

Report Name: XXXXXXXX
Report Date: MM/DD/YYYY

Report No. XXXXXXX
Page: ZZZ9

Arizona WIC Program
Personnel Costs Summary
XXXXXXXXX XXXXXXXXXX* Expenditure Report
From Date: MM/DD/YYYY Thru Date: MM/DD/YYYY

Local Agency: XX XXXXXXXXXXXXXXXX

Clinic: XX XXXXXXXXXXXXXXXX

Name of Employee	WIC Position	Hours Worked in WIC	Hours Spent on XXXXXXX XXXXXX*	Percent of WIC Time on XXXXXX XXXXX*	Gross Annual Salary Plus Benefits With WIC $	Annual Employee Cost for XXXXXX XXXXXXX*
XXXXXXXX, XXXXXXXXX	XXXXXXXXXXX	XXXXX	XXXX	XXXXXXX	XXXXXXX	XXX
XXXXXXXX, XXXXXXXXX	XXXXXXXXXXX	XXXXX	XXXX	XXXXXXX	XXXXXXX	XXX
XXXXXXXX, XXXXXXXXX	XXXXXXXXXXX	XXXXX	XXXX	XXXXXXX	XXXXXXX	XXX

Total Hours Worked in WIC	Total Hours Spent on XXXXXXX XXXXX*	Avg Percent of WIC Time on XXXXXXXXXX*	Gross Annual Salary Plus Benefits With WIC $	Annual Employee Cost for XXXXXX XXXXXXX*
XXXXX	XXXX	XXXXXXX	XXXXXXX	XXX

*The X's represented next to the *'s indicate that this report format can be used for a Personnel Costs Summary report for: Participant Services, Nutrition Education, Breastfeeding, Administration, Immunization, CSFP, Tobacco or Other.

Organizational Unit (Ascending)
Calendar Date (Ascending)
Staff Member Last Name (Ascending)
Staff Member First Name (Ascending)

Calculation(s)

Hours Worked in WIC - The system calculates and displays a count for each employee of the number of hours worked in WIC by adding the number of hours each employee spent performing Participant Services, Nutrition Education, Breastfeeding and Administration activities for the time period being reported on.

Hours Spent on XXXXXX - The system calculates and displays a count for each employee of the number of hours spent on XXXXX by adding the number of hours each employee spent performing the XXXXX activity for the time period being reported on.

Percent of WIC Time on XXXXXX - The system calculates this percentage by dividing the number of hours spent on XXXXX for each employee by the number of hours worked in WIC and multiplying by 100.

Gross Annual Salary Plus Benefits With WIC $ - To calculate this field the system first calculates the staff member's Total Salary (Hourly Salary X 2080 hours per year X FTE). The system then calculates the ERE Benefits cost (Total Salary X ERE%). Finally, the system adds the two results and populates the report with the sum for each employee.

Annual Employee Cost for XXXXXX - The system calculates this field by multiplying the Percent of WIC Time on XXXXX by the Gross Annual Salary plus benefits with WIC $ and displays the result for each staff member.

The system also calculates totals of the counts calculated above:

Total # of hours worked in WIC - SUM of this column for all employees listed in report
Total # hours spent on XXXXXX - SUM of this column for all employees listed in report
Total Percent of WIC time on XXXXXX- SUM of the %s for all employees listed in report / # of employees listed in report
Total Gross Annual Salary plus benefits with WIC $ - SUM of this column for all employees listed in report
Total Annual Employee cost for XXXXXXX - SUM of this column for all employees listed in report

Background Process(es)

The Agencies and Clinics available for selection by the user on the parameter screen are based upon the Local Agency and Clinic codes entered by the user in the Arizona WIC -[Log On] screen.

Section 5 - 3.2.12 : Producing an Annual WIC Cost Summary Sheet

Priority: Required

Window: Annual WIC Cost Summary Sheet

Report: Yes

FSRD Reference: Not in last version. Will be in Section OM 4.

Narrative:

This report allows the Local Agency Coordinator to generate a report of the cost data entered and calculated in the Annual WIC Cost Summary window. This report is generated by the Local Agency Coordinator after all the necessary information has been entered into the Annual WIC Cost Summary window. The Coordinator then runs this report, signs it and mails it to the Manager of the Nutrition Assistance Program.

Data Current As Of: Run Time

Frequency: On Demand

Roles: Operations Management

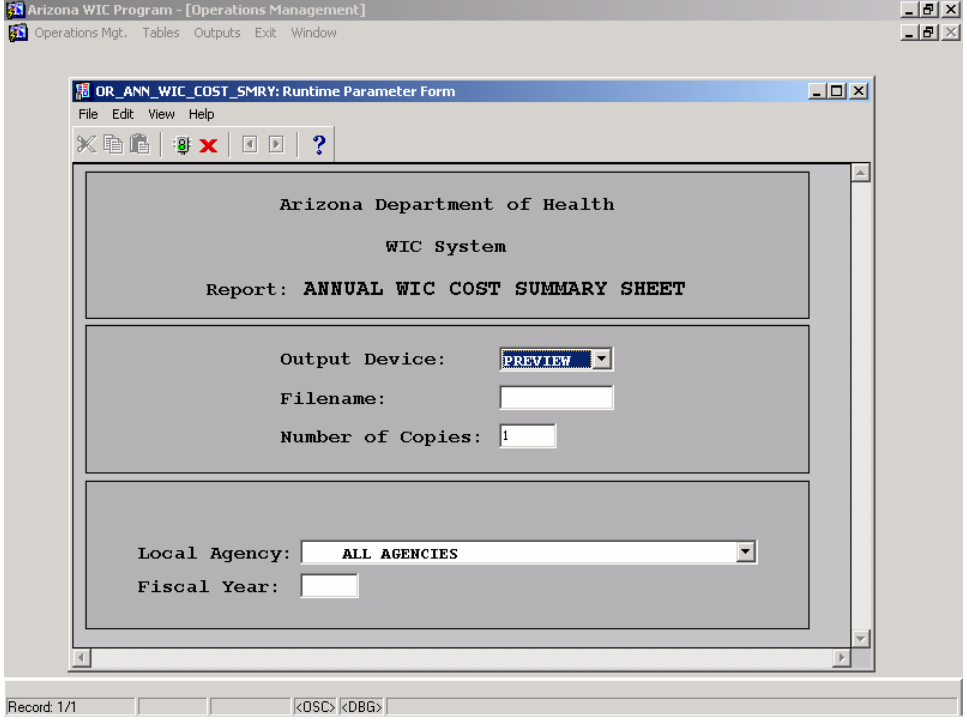

Figure 48 - Annual WIC Cost Summary Sheet Parameter

Fields

Output Device - The user may select from a drop down list: Preview, Screen, Printer, HTML, RTF or PDF.
Filename - If outputting to a file, the directory and filename are entered.
Number of Copies - Select number of copies to print.
Local Agency - Clicking on the list of values allows the user to select whether to report on a single or all Local Agencies. For more information, please refer to the Organizational Units window.
Fiscal Year - Four digit user entered year for which to generate the report.

Push Button(s)

Run Report - Clicking on this button allows the user to run the report.
Cancel - Clicking on this button cancels the report execution / viewing.

Report Name: XXXXXXXXX
Report Date: MM/DD/YYYY

Report No. XXXXXX
Page: ZZZ9

Arizona WIC Program
Annual WIC Cost Summary Sheet
Fiscal Year: XXXX

Local Agency: XX XXXXXXXXXXXXXXXX

	Client Services	Nutrition Education	Breast Feeding Promotion	Administration	Immunization	CSFP	Tobacco	Other	Total
Capital Costs	XXXXX	XXXXX	XXXXX	XXXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX
Indirect Costs	XXXXX	XXXXX	XXXXX	XXXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX
Occupancy Costs	XXXXX	XXXXX	XXXXX	XXXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX
Other Operating Costs	XXXXX	XXXXX	XXXXX	XXXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX
Personnel & ERE	XXXXX	XXXXX	XXXXX	XXXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX
Professional & Outside Services	XXXXX	XXXXX	XXXXX	XXXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX
Travel Costs	XXXXX	XXXXX	XXXXX	XXXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX
Total	XXXXX	XXXXX	XXXXX	XXXXXX	XXXXX	XXXXX	XXXXX	XXXXX	XXXXX

Date: _____

Signature of Program Director_____

Submit this report and supporting documentation to:

Manager
Nutrition Assistance Programs
1740 W. Adams, Rm 203
Phoenix, Az 85007

Sort Criteria (Major to Minor):

Organizational Unit (Ascending)

Calculation(s)

The system calculates the Personnel and ERE values for each activity category by first calculating the total salary and benefit dollars spent on that activity for each local agency employee (Hourly Salary X # of hrs spent performing that activity type X the FTE rate). Next the ERE cost for that activity is calculated (total salary and benefit dollars spent performing that activity X ERE %). The system then adds these two results together for each staff member in the Local Agency. Finally, the system totals the Personnel & ERE cost for all staff members in a Local Agency for an activity and displays the total in the appropriate column in the Personnel and ERE row.

The system calculates the total of the costs in each column and displays the dollar value in the bottom row.

The system calculates the total of the costs in each row and displays the dollar value in the total column at the far right of the report.

Background Process(es)

The Agencies available for selection by the user on the parameter screen are based upon the Agency code entered by the user in the Arizona WIC -[Log On] screen.

Operations Management

Section 5 - 3.2.13 : Producing a Local Agency Annual Report

Priority: Required

Window: None

Report: Yes

FSRD Reference: OM 4

Narrative:

This report, which is produced outside of the AIM application by each of the Local Agency Coordinators on an annual basis, allows the Local Agencies to provide the State Agency with feedback concerning annual milestones, the effects of policy implementation, and other Local Agency daily activities. The layout provided below is in Word Perfect format as requested in the design sessions and will be made available as a separate file on each of the Local Agency servers to Local Agency Coordinators.

Data Current As Of: March, 1999

Frequency: On Demand

Roles: N/A

Appendix A: Annual Progress Report Format

ADHS use only: Received by: _____ Date received: _____

Distribution: QA Manager ___ CCU Manager _ Financial Analyst: __ WNC ____

ARIZONA WIC PROGRESS REPORT (Oct. - Sept.) FY YEAR

LOCAL AGENCY: _____ PREPARED BY: _____

Please use data/statistics to support statements where possible. This report is due November 15 every year.

1. Briefly discuss progress toward meeting program goals and objectives to verify contract work statement compliance. (Attach goals and objectives and refer to contract for work statements.)

2. List and describe innovations, changes and/or problems in the following areas:

   a. Outreach/marketing
   b. Breastfeeding promotion
   c. Nutrition education
   d. Management practices
   e. Customer satisfaction
   f. Referrals
   g. Community education/collaboration
   h. Risk specific nutrition care plans
   i. Growth issues other than infrastructure
   j. Vendor
   k. Food package issues
   l. Other

3. What are the participants' major nutrition risks? How is the program addressing these problems?

Continued on next page

ARIZONA WIC PROGRAM ORIGINAL: March 1997
POLICY AND PROCEDURE MANUAL REVISION:

Appendix A: Annual Progress Report Format, CONTINUED

4. List and describe program infrastructure/resource (e.g., staff, space, money) problems, both resolved and unresolved. What are the program's recommendations for solutions? How can the state assist the program with these problems?

5. Consider the last program Management Evaluation recommendations. What progress has been made toward the corrective action plan?

6. How does the program insure quality? What standards are currently being used? List and describe identified problems and how they are addressed.

7. If assigned caseload was not met, explain why. If it was exceeded, explain how this was accomplished.

8. What operational changes are expected in the next fiscal year?

9. List and describe any other activities which are pertinent.

ARIZONA WIC PROGRAM ORIGINAL: March 1997
POLICY AND PROCEDURE MANUAL REVISION:

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