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Section 1 - 1 : Overview

State of Arizona
Appointment Scheduler Objectives
AIM WIC System

The proposed changes to the current AIM Appointment Scheduler are a result of the November 5-7, 2001 G.A.D session in Phoenix, Arizona. The GAD session participants comprised local agency supervisors, local agency paraprofessionals, State automation team members, State nutritionists, and CMA consultants. This session was organized to discuss the enhancement/replacement of the AIM Appointment Scheduler module, specifically focusing on improving the functionality of setting up the clinic appointment data and maintenance of appointments. The following reasons outline the issues experienced by the clinic staff using the current Appointment Scheduler and suggested improvements to restructure the functionality and appearance of the appointment scheduler:

Appointment Scheduler Setup

Creating the clinic calendar is a step building process to produce an appointment book specific for a clinic and a particular “clinic day”. The appointment book functionality is set according to supplied base table data, staff data, and clinic processes.

Current Issues
- The method to build a clinic calendar/appointment book is a cumbersome and confusing process for the users in the clinic(s).
- The confusion lies in creating a template for a specific “clinic day” as the template is tied to the clinic and not to the staff person.
- The templates, which direct the build of the clinic calendar, have built inconsistently; therefore resulting in a reversal of required numbers of individuals for the template.

Suggested Improvements
- A template should be created according to the staff person’s availability, instead of the clinic.
- Creating staff availability within the clinic requires the need for a daily/monthly calendar to select the appropriate calendar days a staff person works.
- Easy modification to schedule after setup.

Individual Appointment Assignments and Maintenance

The current appointment book allows the user to view one staff’s calendar page at a time.

Current Issues
- In order to view different staff’s calendar pages, the user must have the cursor in the staff ID field and scroll with the arrows to view the next staff’s appointment page. The user can’t glace at all the appointments for all the staff at once.
- Currently appointments are based on client ID numbers.
- The status selections for appointments (pending, kept, missed) are not specific enough. There need to be additional selections available.
Suggested Improvements
- The AIM users would like to see all of the clinic staff and their respective calendar pages on one screen in the appointment book.
- AIM users would prefer to base appointments from the family ID number, so as to view the needs for the family appointment. Arizona wants to schedule by the family ID.
- A family record (flowsheet) will provide the AIM user with each client’s appointment type and start time, the client’s date of birth, the authorized representative, and the outcome of the appointment – kept, pending, or missed.
- Functionality is essential for canceling and rescheduling, as well as deleting appointments.
- A tracking method for deleted, cancelled, and rescheduled appointments is requested for view at the family record and the appointment sheet.
- Mass Rescheduling will be eliminated.

Group/Class Appointments Creation and Maintenance

Current Issues
- Groups/classes are created and viewed via three different areas of the Appointment Scheduler module screens. This process is time consuming and inflexible to the user creating groups/classes.
- Currently once a class is named and created, that class cannot be used again because of the specific group ID number assigned to it.
- Searching for future classes is inflexible, as a search result provides the user with the next class even if it is full.

Suggested Improvements
- The AIM users request the ability to use groups/classes, titles, repeatedly.
- Group/class creation, scheduling, and viewing need to occur on fewer screens.
- In addition, AIM users would prefer to have options for “clinic only” so as not to search the local agency or statewide database when creating groups/classes or choosing staff.
- Users prefer to have the search result in the next “available” class for the “family” as opposed to the current function, by “client”.
- Scheduling a “family” for a class will populate the field with the client information.
- The class attendance screen should list the client’s certification end date.
- The users would like a function key to click on that will mark all those who attended the class as “kept/attended” the class, and batch print FI’s for attendees.
- In addition, users want the functionality of navigating to the Class Assignment screen from the On Demand screen in the Enrollment and Certification module.
Reports / Outputs

Current Issues
- Several of the reports available in the AIM system aren’t being utilized because they don’t provide any valuable information for clinic scheduling.
- Some of the reports that are used are missing valuable information such as Client IDs and contact information.

Suggested Improvements
- Move the Federal Processing Standards Report (Now to be called the New Enrollment Wait Time Report) from the Appointment Scheduler module to the Enrollment and Certification Module.
- An addition to the Reports section is to include a Daily Schedule and Staff Schedule report for each clinic’s business day. These will be new reports.
- The List of Appointments report is to include client ID’s, phone numbers, date of birth, category, and authorized representative.
- The AIM users are requesting an overriding of appointments option.
- The users want tighter, yet flexible control for the override function within the appointment page when there occurs mismatches of staff being assigned program services they don’t normally perform. This control will be facilitated by the use of a new role “AS_OVERRIDE” to be created in the System Administration module.
- A report to track overriding by staff and clinic is also requested.
Appointment Scheduler

Section 1: Appointment Scheduler

Section 1 - 2 : Menus

Section 1 - 2.1 : Main Menu
Section 1 - 2.2: Appointment Scheduler Menu
Section 1 - 3 : Tables

Section 1 - 3.1 : Update Table Information

Section 1 - 3.1.1 : Update Items to Bring

Priority: Required

Window: Maintain Items to Bring

Report: No

Narrative:

This window is used to capture and maintain codes for items to bring to appointments. This table is linked to other windows where this information is used. This table will be State maintained to ensure uniformity system-wide. A System Administration role will be assigned to the appropriate State staff required performing modification or updates to the values in the Items to Bring table. Local Agency and Clinic personnel will only be able to view and print the values in this table.

Once the items are selected as Things to Bring, they also appear on the Appointment Notice once printed for the client.

Business Rules
- The codes and descriptions in the Items to Bring table must be consistent across all Local Agencies and Clinics. The table will be defined and maintained by the State.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ DEVELOPER</td>
<td>Y</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>NUTRITIONIST_1</td>
<td>Y</td>
</tr>
</tbody>
</table>
Section 1 - 3.1.1.1 : Maintain Items to Bring

Fields

**Code** - The user enters the code letters for items to bring. This field is mandatory.

**Description** - The description of the Items to Bring. This field is mandatory.

**Comment** - The user may provide any comments or remarks concerning this item to bring. This field is optional.

Calculation(s)

None.

Background Process(es)

None.

Field to Column Mapping:

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>AAS_ITEMS</td>
<td>ITEM_CODE</td>
</tr>
<tr>
<td>Description</td>
<td>AAS_ITEMS</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>Comment</td>
<td>AAS_ITEMS</td>
<td>NOTE</td>
</tr>
</tbody>
</table>
Appointment Scheduler

Section 1 - 3.1.2  : Update Attendance Statuses

Priority: Required

Window: Maintain Attendance Statuses

Report: No

Narrative:

This window is used to capture and maintain codes for attendance statuses. This table will be State maintained to ensure uniformity system-wide. A System Administration role will be assigned to the appropriate State staff required to perform modification or updates to the values in the Attendance Statuses table. Local Agency and Clinic personnel will only be able to view and print the values in this table.

The Attendance Status is the method in which the appointment is tracked:
- deleted/cancelled
- rescheduled
- walk-in (will have the same meaning as “kept” but is more specific)
- kept
- missed
- pending.

All appointments are listed as pending until the client’s FI’s have been printed for that appointment day.

The attendance status becomes marked as Missed or Kept upon completion of the End of Day process for appointments that are left with a status of Pending on the date of the appointment. Appointments for walk-ins won’t be automatically marked as walk-in via the End of Day processing; users will have to manually select the status of walk-in at the time of the appointment.

A Participant’s appointment status is updated from pending (P) to kept (K) during the End Of Day processing depending on the following conditions (does not apply to Participants classified in check out Clinic status):
1. If food instruments have been issued for the appointment date
2. AND the disposition of any food instrument is issued
3. AND/OR a medical or bloodwork record's create date is equal to the appointment date

If the Participant meets one of the following three combinations: 1&2, 1&3, or 1,2&3, then the appointment status will be updated from pending (P) to kept (K) during End Of Day processing.

Also, If the Participant is a mother and she meets the criteria above to have her appointment updated to kept (K) and her infant is exclusively breastfeeding, then her infant's appointment record will be updated to kept (K) also.
A Participant's appointment status is updated from pending (P) to missed (M) if the above conditions are not met.

When the system queries the database to determine whether a Participant's appointment record meets the necessary conditions to update the appointment status, it verifies that the Clinic that the Participant's Family ID is linked to isn't checked out. If the system verifies that the Clinic is checked out, the system does not update the Participant appointment record to either kept or missed.

In the case of cancelled appointments, when a user makes a new appointment for a client and a pending appointment exists a message will be displayed to the user indicating the old appointment can be kept, deleted, or the user can exit the screen to research the pending appointment before scheduling a new one.

**Business Rules**
- In the case of cancelled appointments, when a user makes a new appointment for a family and a pending appointment exists. The user will have the option to keep the previous appointment, delete it, or cancel the creation of the new appointment.
- The attendance status values must be uniform statewide for all Clinics.
- When an appointment is deleted/cancelled by a user, the current family's appointment is removed from the Appointment Sheet to make the appointment slot available again for reuse by another family. The system will automatically store a record in the C_CLIENT_SERVICES table with a status of deleted/cancelled for the family whose appointment was removed.

**Data Current As Of:** Run Time

**Frequency:** On Demand

**Role(s):**

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ DEVELOPER</td>
<td>Y</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>NUTRITIONIST_1</td>
<td>Y</td>
</tr>
</tbody>
</table>
Section 1 - 3.1.2.1 : Maintain Attendance Statuses

![Figure 2 - Maintain Attendance Statuses](image)

**Fields**

**Code** - A single letter code that represents an attendance status. This field is mandatory.

**Description** - A description corresponding to the status code. This field is mandatory.

**Comment** - The user may provide any comments or remarks concerning an attendance status. This field is optional.

**Calculations:**

None

**Background Processes:**

None

**Field to Column Mapping**

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<th>Table Column</th>
</tr>
</thead>
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<tr>
<td>Description</td>
<td>A_ATTEND_STATUSES</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>Comment</td>
<td>A_ATTEND_STATUSES</td>
<td>NOTE</td>
</tr>
</tbody>
</table>
Appointment Scheduler

Section 1 - 3.1.3 : Update Activities

Priority: Required

Window: Maintain Activities

Report: No

Narrative:

This window is used to capture and maintain codes for activities.

Activities are used as appointment slot fillers in the appointment type field of the staff appointment page. These activity types are used to block out time for non-client services for the staff and clinic.

The following Activities will be used by Arizona clinics statewide:

- In-service
- Other
- Paperwork
- Lunch
- Break
- Not Available

Business Rules

- Activity values will be defined by the state and uniform statewide across all clinics.
- Activities are functions scheduled and performed by WIC staff during the course of normal business that aren't services provided to clients.
- Not Available will be stored as an activity and used to allow a user to assign a time slot as not capable of having an appointment scheduled for it.
- Not Available will be an Activity that the user can override and replace with another service or activity when assigning appointments in the Appointment Sheet.
- Users with the AS_OVERRIDE role in Systems Administration assigned to them will be able to override all activity and appointment service types.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
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</tr>
<tr>
<td>SA_OPERATIONS</td>
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<tr>
<td>Role</td>
<td>Permission</td>
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<td>------------</td>
</tr>
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</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>Y</td>
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</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>NUTRITIONIST_1</td>
<td>Y</td>
</tr>
</tbody>
</table>
Section 1 - 3.1.3.1: Maintain Activities

Fields

**Code** - A user entered alpha code for an activity. This field is mandatory.

**Description** - A user entered description of the activity. This field is mandatory.

**Comment** - The user may provide any comments or remarks. This field is optional.

**Disabled** – This field, if checked, indicates to the user that the corresponding activity is not selected in any list of values in the New Appointment Scheduler module. This field is display only.

**Calculations:**

None

**Background Processes:**

None

**Field to Column Mapping:**

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
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<td>Description</td>
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<td>Disabled</td>
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</tbody>
</table>
Appointment Scheduler

**Section 1 - 3.1.4** : Update Program Services

**Priority:** Required

**Window:** Maintain Program Services

**Report:** No

**Narrative:**

This window is used to capture and maintain alphanumeric codes for program services. This window allows the user to define and maintain what services can be performed and whether the source has FI issuance, Nutrition Education and/or Group services as a component.

The program services are the types of appointments/services that are performed for the client based on their status within the WIC program. These service short names appear in a List of Values drop down for the appointment type and are used based on the description of the client appointment.

Arizona will utilize appointment types that allow super users to assign staff to only certain kinds of services for appointment. Slots, for example: Any Appointments.

<table>
<thead>
<tr>
<th>Short Name</th>
<th>Tasks and Services Rendered</th>
</tr>
</thead>
<tbody>
<tr>
<td>ANY</td>
<td>Any type of appointment – *Not including HR Ed. Group or CNSL</td>
</tr>
<tr>
<td>CNSL</td>
<td>MEDIUM RISK COUNSELLING, FI</td>
</tr>
<tr>
<td>FPCERT</td>
<td>FOOD PLUS CERT</td>
</tr>
<tr>
<td>GROUP</td>
<td>Group or Class, FI</td>
</tr>
<tr>
<td>ISSUE</td>
<td>FI</td>
</tr>
<tr>
<td>HLTHCK</td>
<td>HEALTH CHECK, FI</td>
</tr>
<tr>
<td>NEW</td>
<td>INITIAL CERT, FI</td>
</tr>
<tr>
<td>NUT ED</td>
<td>NUTRITION, FI</td>
</tr>
<tr>
<td>HR ED</td>
<td>High Risk Nutrition ED (HT./WT. OR HGB), FI</td>
</tr>
<tr>
<td>CERT</td>
<td>CERTIFICATION, FI</td>
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<tr>
<td>TRANS</td>
<td>TRANSFER (IN- OR OUT-OF-STATE), NUT. ED., FI</td>
</tr>
</tbody>
</table>

Users will have the ability to assign appointments to staff members that aren’t specifically designated to handle certain types of appointments as long as the staff member performing the assigning has the new role “AS_OVERRIDE” assigned to her/his User ID the System Administration module.

**Business Rules**

- Service values will be defined by the state and uniform statewide across all clinics.

**Data Current As Of:** Run Time

**Frequency:** On Demand

**Role(s):**
<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>SA OPERATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ DEVELOPER</td>
<td>Y</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>NUTRITIONIST_1</td>
<td>Y</td>
</tr>
</tbody>
</table>
Section 1 - 3.1.4.1: Maintain Program Services

Figure 4 - Maintain Program Services

Fields

Code - An alpha numeric code for the service. This field is mandatory.
Description - A description to correspond to the service code. This field is mandatory.
Comment - The user may provide any comments or remarks concerning the service. This field is optional.

Check Box(es)

FI Issued - The user selects this box if food instruments are issued with this service.
NE - This box is to be selected if the service includes a Nutrition Education program.
Class - Services that are only offered to a Class (such as particular Nutrition Education), and not on an individual basis.
Disabled – This field, if checked, indicates to the user that the corresponding service is not selected in any list of values in the New Appointment Scheduler module. This field is display only.

Calculations:

None

Background Processes:

The check box flags are required because the system utilizes them in system processing for reporting purposes, so detailed reports can be produced more efficiently.
Field to Column Mapping:

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>A_SERVICES</td>
<td>SERVICE_CODE</td>
</tr>
<tr>
<td>Description</td>
<td>A_SERVICES</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>Comment</td>
<td>A_SERVICES</td>
<td>NOTE</td>
</tr>
<tr>
<td>FI Issued</td>
<td>A_SERVICES</td>
<td>FI_ISSUANCE_FLAG</td>
</tr>
<tr>
<td>NE</td>
<td>A_SERVICES</td>
<td>NUTR_ED_FLAG</td>
</tr>
<tr>
<td>Class</td>
<td>A_SERVICES</td>
<td>GROUP_FLAG</td>
</tr>
<tr>
<td>Disabled</td>
<td>A_SERVICES</td>
<td>DISABLE_FLAG</td>
</tr>
</tbody>
</table>
Appointment Scheduler

Section 1 - 3.1.5 : Update Reasons Office Closed

Priority: Required

Window: Maintain Reasons Office Closed

Report: No

Narrative:

This window is used to capture and maintain codes for reasons for offices to be closed. The user can add federal holidays, any other designated holiday, conferences or training days as reasons that will close a Clinic for an entire day. **This table will be State maintained to ensure uniformity system-wide. The local agencies will apply the holidays to their appointment calendar at their discretion.**

The holidays observed by the State of Arizona that are set and factored in when the calendar is built.

The values are as follows:

<table>
<thead>
<tr>
<th>Code</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>1</td>
<td>NEW YEAR'S DAY</td>
</tr>
<tr>
<td>2</td>
<td>MARTIN LUTHER KING JR. / CIVIL RIGHTS DAY</td>
</tr>
<tr>
<td>3</td>
<td>PRESIDENTS DAY</td>
</tr>
<tr>
<td>4</td>
<td>MEMORIAL DAY</td>
</tr>
<tr>
<td>5</td>
<td>INDEPENDENCE DAY</td>
</tr>
<tr>
<td>6</td>
<td>LABOR DAY</td>
</tr>
<tr>
<td>7</td>
<td>COLUMBUS DAY</td>
</tr>
<tr>
<td>8</td>
<td>VETERAN'S DAY</td>
</tr>
<tr>
<td>9</td>
<td>THANKSGIVING</td>
</tr>
<tr>
<td>10</td>
<td>CHRISTMAS</td>
</tr>
<tr>
<td>11</td>
<td>STATE / LOCAL MEETING</td>
</tr>
<tr>
<td>12</td>
<td>FIRE / WEATHER / OTHER DISASTER</td>
</tr>
<tr>
<td>13</td>
<td>OTHER CLOSURE</td>
</tr>
<tr>
<td>14</td>
<td>INSERVICE</td>
</tr>
<tr>
<td>15</td>
<td>END OF MONTH DAY</td>
</tr>
</tbody>
</table>

**Business Rules**

- Reasons Office Closed values will be defined by the state and uniform statewide across all clinics.

**Data Current As Of:** Run Time

**Frequency:** On Demand
### Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>Y</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>NUTRITIONIST_1</td>
<td>Y</td>
</tr>
</tbody>
</table>
Section 1 - 3.1.5.1 : Maintain Reasons Office Closed

Figure 5 - Maintain Reasons Office Closed

Fields

**Code** - The code for the reason the office is closed. This field is mandatory.

**Description** - The user-entered description of why the office is closed. This field is mandatory.

**Comment** - The user may provide any comments or remarks. This field is optional.

Calculations:

None

Background Processes:

None

Field to Column Mapping:

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Code</td>
<td>A_OFFICE_CLOSED</td>
<td>OFFICE_CLOSED_CODE</td>
</tr>
<tr>
<td>Description</td>
<td>A_OFFICE_CLOSED</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>Comment</td>
<td>A_OFFICE_CLOSED</td>
<td>NOTE</td>
</tr>
</tbody>
</table>
Appointment Scheduler

Section 1 - 3.1.6 : Update Organizational Units Information

Priority: Required

Window: Organizational Units

Report: No

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.

The user is also capable of inputting an Appointment Interval for the clinic’s schedule. The interval will be fixed for that clinic for all days of operation. For example, the Maricopa clinic can use 15-minute intervals, while the Pima clinic can have 10 minutes.

Business Rules
- Every clinic in the Organization Units must have the Appointment Interval for that clinic entered to facilitate the times shown in the Staff Day and Appointment Sheet screens.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>SA_ITS_SECURITY_ADMIN</td>
<td>Y</td>
</tr>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>OPERATION_MANAGER</td>
<td>N</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>N</td>
</tr>
<tr>
<td>SA_NUTRITIONIST</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 3.1.6.1 : Organizational Units – Next Page Popup

Figure 6 - Operations Management – Next Page Popup

Fields

Appointment Interval (min) – The user enters the time interval the clinic will use for its Staff Day and Appointment Sheet. There can only be one interval per clinic. The interval will be used for everyday of the week. This field is mandatory. This field defaults to 15 minutes.

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, and 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.

**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]
```

**Field to Column Mapping:**

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Appt Notices</td>
<td>O_ORGANIZATIONAL_UNITS</td>
<td>PRINT_APPT_NOTICES</td>
</tr>
<tr>
<td>Print Appt Labels</td>
<td>O_ORGANIZATIONAL_UNITS</td>
<td>PRINT_APPT_LABELS</td>
</tr>
<tr>
<td>Appt Interval</td>
<td>O_ORGANIZATIONAL_UNITS</td>
<td>INTERVAL</td>
</tr>
<tr>
<td>Cross Streets</td>
<td>O_ORGANIZATIONAL_UNITS</td>
<td>CROSS_STREETS</td>
</tr>
<tr>
<td>Organization Size</td>
<td>O_ORGANIZATIONAL_UNITS</td>
<td>ORG_SIZE</td>
</tr>
<tr>
<td>WIC Clinic</td>
<td>O_ORGANIZATIONAL_UNITS</td>
<td>WIC_CLINIC_FLAG</td>
</tr>
<tr>
<td>CSFP Clinic</td>
<td>O_ORGANIZATIONAL_UNITS</td>
<td>CSFP_CLINIC_FLAG</td>
</tr>
<tr>
<td>CSFP Distribution Site</td>
<td>O_ORGANIZATIONAL_UNITS</td>
<td>CSFP_DISTRIBUTION_SITE_FLAG</td>
</tr>
<tr>
<td>Zip Codes Serviced</td>
<td>Unapproved Change Order</td>
<td>Unapproved Change Order</td>
</tr>
</tbody>
</table>
Section 1 - 4 : Setup

The Appointment Scheduling module requires that the Local Agency Coordinator or designee perform the following steps (in order) of the Scheduling Setup:

- Ensure that the Local Agency, Clinic, and Staff Data to be used in the Scheduling Setup have been entered in the Organizational Units and Staff Data screens of the Operations Management module. The LA Coordinator should verify that each Staff Member for the Clinic schedule they are setting up has the correct information entered in the Staff Data window. This includes entering a value in the alphanumeric Alias field of the Staff Data screen in the Operations Management module. The Alias will populate the Staff Day and Appointment Sheet screens later on. Also, the user must enter the Time Interval in the Next Page pop-up of the Operations Management – Organizational Units screen.

- Establish the Base Tables data information, if it has not been completed by the State office, for the Agency and Clinic(s). This information supplies the necessary screens to build the Appointment Sheet calendars.

- Establish the Office Hours for the Clinic. The LA Coordinator needs to enter the days of the week and the hours for each day that the Clinic will be open to provide services.

- Establish Dates Office Closed. The LA Coordinator needs to enter the reasons office closed and dates for the coming year (or as far in the future as possible) for the Clinic so the appointment scheduler will not schedule appointments on these dates.

- The designated user enters the Clinic Services window, selects the Clinic, and then selects the Duration in Minutes to be used for each service. The Time Interval is fixed for each clinic regardless of the day of the week. The Duration in Minutes assigned for each service must be a multiple of the Time Interval entered in Operations Management.

- Create a Staff Day from the Staff Data entered for each Staff Member. This screen is used to schedule the staff members to perform services for the different clinic weekdays. All Staff Members for the clinic appear on this screen provided they have an active status in their Staff Data record and they have been assigned a value greater than 0 in the Staff Order screen. Next, select the day of the week, and determine which staff members will be working that day. The user selects cells for each Staff Member's alias, then assigns the activities and services that this Staff Member will have the ability to perform. Determine which Staff Members will be unavailable for the specific weekday and select the Not Available activity for those cells. This step is important because it links the activities and services being provided in a Clinic on a particular weekday to actual start and end times of the staff’s schedule. If other clinic operation days are consistent with each other, use the Copy Day button to fill those staff days for other days of the week.
Establish the Clinic Calendar via the Staff Scheduler tab for a whole month and clinic staff at a time or one staff member at a time for the selected month. Publish the staff person’s schedule by “filling” the month. To modify the default monthly schedule for each Staff Member, based on the criteria entered in the Staff Day Tab, use the Edit Schedule Tab to fill or close a single specific calendar date or a period of time within a date. Create the schedule for the clinic by selecting the following criteria: the clinic, year, month, and staff person.
Appointment Scheduler

Section 1 - 4.1 Staff Information – Operations Management

Section 1 - 4.1.1 Update Staff Data

Priority: Required

Window: Staff Data

Report: No

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):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>CNW</td>
<td>Y</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>Y</td>
</tr>
<tr>
<td>SA_VIEWER_2</td>
<td>Y</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>Y</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>Y</td>
</tr>
<tr>
<td>SYSADM</td>
<td>Y</td>
</tr>
<tr>
<td>APPT_SCHEDULER</td>
<td>Y</td>
</tr>
<tr>
<td>FI_ISSUER</td>
<td>Y</td>
</tr>
<tr>
<td>BF_COUNSELOR</td>
<td>Y</td>
</tr>
<tr>
<td>AS_CLNDR_BLDR</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 4.1.1.1 : Staff Data - Main

Figure 7 - 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 alphanumeric 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 grayed out.

MI2 - Staff person’s second middle initial. This field is optional and will not be grayed 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.

**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. If this check box is selected, all fields under the Job Description section become "un-enterable" and the Title push button becomes active.

**Local Agency Coordinator** - If checked, the staff member is a Local Agency Coordinator.

**Home Org** – If checked, designates the corresponding Program ID as the staff person’s home organization and primary job responsibility. The system defaults the Address and Phone number data in the Staff Information section to the Local Agency address and phone number. This field is mandatory.
Push Button(s)

[CO24] Title - This button is clicked on by the user when entering staff information for a Non-WIC Contractor. It becomes active when the user clicks the Non-WIC Contractor check box.[END CO24]

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.

[CO24] The system deactivates all fields under the Job Description section and the Title push button becomes active when the user clicks on the Non-WIC Contractor check box.[END CO24]

Field to Column Mapping:

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Staff Id</td>
<td>O_STAFF_MEMBER</td>
<td>STAFF_MEMBER_ID</td>
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<tr>
<td>Position #</td>
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<td>POSITION_NUMBER</td>
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<td>PSEUDO_FLAG</td>
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<td>NON_WIC_FLAG</td>
</tr>
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<td>LAST_NAME</td>
</tr>
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</tr>
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</tr>
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<td>MI2</td>
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<td>MI2</td>
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<td>O_STAFF_MEMBER</td>
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<td>SC_DESCRIPTION</td>
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<td>DESCRIPTION</td>
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<td>O_STAFF_MEMBER</td>
<td>ZIP4</td>
</tr>
<tr>
<td>----</td>
<td>----------------</td>
<td>------</td>
</tr>
<tr>
<td>Comment</td>
<td>O_STAFF_MEMBER</td>
<td>NOTE</td>
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<td>OP_PRG_PROGRAM_ID</td>
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<td>DESCRIPTION</td>
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</tr>
<tr>
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<td>O_ORGANIZATIONAL_UNITS</td>
<td>NAME</td>
</tr>
<tr>
<td>Title</td>
<td>O_JOB_DESCRIPTIONS</td>
<td>ST_STAFF_TITLE_CODE</td>
</tr>
</tbody>
</table>
Appointment Scheduler

Section 1 - 4.2 : Clinic Tables

Section 1 - 4.2.1 : Update Dates Office Closed

Priority: Required

Window: Maintain Dates Office Closed

Report: No

Narrative:

This window allows the Local Agency/Clinic user to enter the dates the Clinic office will be closed and the corresponding reason. These dates will be verified by the system in the Staff Scheduler screen when scheduling appointments to ensure calendar dates listed in this table will not have services and activities scheduled on them.

Entered and displayed on this screen are the holidays observed by the State of Arizona.

Closure dates are set in this screen by the State.

The dates entered by the user to be closed will not be built as part of calendar building.

Business Rules

- Dates that the Clinics are closed will show in the Appointment Sheet screen with the first row displaying the statement “Office Closed.” As well, the system will display an “X” on that date, whenever the calendar for that month is selected to visually indicate to the user the Office is closed that date
- A user who clicks on the calendar in the Appointment Sheet for a day that does not have a calendar built will see the system display an error message indicating that there is no calendar built for that day.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
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</thead>
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<tr>
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<td>BF_COUNSELOR</td>
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<td>CNW</td>
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<td>Role</td>
<td>Access Level</td>
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<td>-------------------------</td>
<td>--------------</td>
</tr>
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<td>FI_ISSUER</td>
<td>Y</td>
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<tr>
<td>SA_OPERATIONS</td>
<td>Y</td>
</tr>
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<td>SA_VIEWER_1</td>
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<td>SA_VIEWER_2</td>
<td>Y</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>Y</td>
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<tr>
<td>SYSADM</td>
<td>Y</td>
</tr>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>AS_CLNDR_BLDR</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 4.2.1.1 : Maintain Dates Office Closed

**Fields**

**Clinic** - Clicking the list of values button allows the Local Agency or Clinic scheduling administrator to select the Clinic and calendar dates of closure. At the LA/Clinic Level under the Clinic field, the user will be able to select an “ALL CLINICS” value to assign the dates closed for ALL CLINICs within the Local Agency the user logged into. The ALL CLINICS selection will be available as the last value available in the list of values. For more information, please refer to the Organizational Units window in Operations Management. This field is mandatory.

**Code** - The code for the reason the office is closed on the associated date. This field will automatically populate immediately after the user selects a value in the description field. This field is mandatory.

**Description** - Clicking on the list of values button allows the user to select the reason the office will be closed on the date the user will enter in the next field. For more information, please refer to the Reasons Office Closed window. This field is mandatory.

**Date** - The date the office was/is to be closed. If the user enters a code value for a row, the system will require that a date is also entered for that row. This date will be verified when the user schedules appointments in the Clinic Calendar window to ensure no services or activities are scheduled for this date. This field is mandatory.

**Note** - The user may provide any comments or remarks. This field is optional.

**Calculations:**

None
Background Processes:

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

Field to Column Mapping:

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
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</tr>
</thead>
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<tr>
<td>Code</td>
<td>AAS_DATES_OFFICE_CLOSED</td>
<td>AS_OC_OFFICE_CLOSED_CODE</td>
</tr>
<tr>
<td>Description</td>
<td>AAS_OFFICE_CLOSED</td>
<td>DESCRIPTION</td>
</tr>
<tr>
<td>Date</td>
<td>AAS_DATES_OFFICE_CLOSED</td>
<td>DOC_DATE</td>
</tr>
<tr>
<td>Comment</td>
<td>AAS_DATES_OFFICE_CLOSED</td>
<td>NOTE</td>
</tr>
</tbody>
</table>
Section 1 - 4.2.2 : Hours of Operation

Priority: Required

Window: Hours of Operation

Report: No

Narrative:

This window allows users to establish the hours of operation for each day of the week for a Clinic. The Hours of Operation are required to allow management at Local Agencies and Clinics to view reports from the System Administration module, which indicate whether users are attempting to access the AIM system outside of normal office hours.

Business Rules
- Each clinic will be capable of entering Office hours specific to their clinic and different than other clinics within the same Local Agency.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
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<tr>
<td>APPT_SCHEDULER</td>
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<td>AZ.DEVELOPER</td>
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</tr>
<tr>
<td>BF.COUNSELOR</td>
<td>Y</td>
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<td>CNW</td>
<td>Y</td>
</tr>
<tr>
<td>FI.ISSUER</td>
<td>Y</td>
</tr>
<tr>
<td>SA OPERATIONS</td>
<td>Y</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>SA_VIEWER_2</td>
<td>Y</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>Y</td>
</tr>
<tr>
<td>SYSADM</td>
<td>Y</td>
</tr>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>AS_CLNDR.BLDR</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 4.2.2.1 : Hours of Operation

Figure 9 – Hours of Operation

Fields

Clinic - Clicking on the list of values button allows the user to select a Clinic for which to establish daily office hours. For more information, please refer to the Organizational Units window in Operations Management. This field is mandatory.

Day - Clicking on the list of values button allows the user to select a day of the week to establish daily office hours for. The user selectable values in this list are stored in a pre-programmed domain. The user may select from the following values: Sunday, Monday, Tuesday, Wednesday, Thursday, Friday and Saturday. Multiple rows may contain the same day value. This field is mandatory.

Open - The user enters the starting time the Clinic opens. This format is HH:MM AM/PM. This field is mandatory.

Close - The user enters the ending time the Clinic closes. This format is HH:MM AM/PM. This field is mandatory.

Comment - The user may provide any comments or remarks. This field is optional.

Calculations:

None
Background Processes:

If a user increases the range in the hours of operation, i.e. 9 to 5 becomes 8 to 6, and Staff Days have already been created at the clinic, the system will automatically save additional records in the AAS_STAFF_DAYS table and the AAS_APPOINTMENTS table and display them as blank rows at the bottom and top of the screen the next time the user enters the Staff Day screen or the Appointment Sheet screen for that clinic.

If a user decreases the range in the hours of operation, i.e. 8 to 6 becomes 9 to 5, and Staff Days have already been created at the clinic, the system will display an error message indicating: “Shortening Hours Of Operation Will Modify The Staff Day And Remove Appointment Slots. Do You Wish To Continue?”. If the user selects OK, the system will remove records from the AAS_STAFF_DAYS table and the AAS_APPOINTMENTS table and this will be reflected the next time the user enters the Staff Day screen and the Appointment Sheet screen for that clinic.

Field to Column Mapping:

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
<tbody>
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<td>Day</td>
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<td>DAY_OF_WEEK</td>
</tr>
<tr>
<td>Open</td>
<td>AAS_OPERATION_HOURS</td>
<td>HOURS_OPEN</td>
</tr>
<tr>
<td>Close</td>
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<td>HOURS_CLOSED</td>
</tr>
<tr>
<td>Comment</td>
<td>AAS_OPERATION_HOURS</td>
<td>NOTE</td>
</tr>
</tbody>
</table>
Section 1 - 4.2.2.2 : Hours of Operation – Expand Hours Pop-up

Figure 10 – Hours of Operation – Expand Hours Pop-up

Push Buttons

**OK** – The user clicks this button after having read the popup message from the system indicating that the Hours of Operation will cause the Staff Day screen and the Appointment Sheet screen to have additional time slots shown when the user enters that screen. When the user clicks OK, the system will commit the change for the new Hours of Operation entered by the user.

**Cancel** – The user clicks this button to return to the Hours of Operation screen without committing the entered changes to the database.

Calculations

The system will calculate if the Start Time in the AAS_OPERATION_HOURS table is less than the Start Time of any records in the AAS_STAFF_DAYS table. If so, the message above will appear.

Background Processes

The message above will appear if the user attempts to expand the Hours of Operation. The result will be that the system will populate the AAS_STAFF_DAYS table and the AAS_APPOINTMENTS table with additional rows with a services type of “Not Available” for the user to modify as appropriate.

Field to Column Mapping:

N/A
Section 1 - 4.2.2.3 : Hours of Operation – Reduce Day Pop-up

**Push Buttons**

**OK** – The user clicks this button after having read the popup message from the system indicating the need to move the scheduled appointments from the day that the user wants to fill or clear a staff schedule for. The system will return the user to the Hours of Operation screen without committing any changes.

**Print Conflicts** - The user clicks this button to generate a list of the staff and dates that they have appointments scheduled which are in conflict for the day in which the user is attempting to reduce the Hours of Operation.

**Calculations**

The system will determine if the start time being entered is greater than the start time for a pending appointment in the AAS_APPOINTMENTS table. If it is, the user is attempting to make the office hours for a time period that won’t include that appointment anymore.

**Background Processes**

The message above will appear if the user attempts to reduce the Hour of Operations for a day in which there are appointments scheduled in the time slots that will no longer be within the new Hours of Operation.

**Field to Column Mapping:**

N/A
Section 1 - 4.2.2.4 : Print Conflicts Report Format

Report Name: ARR_APPT_CONFLICT
Report Date: MM/DD/YYYY
Report No: AS1201
Page: ZZZ9

Arizona WIC Program
APPOINTMENT CONFLICTS REPORT

Clinic: XX XXXXXXXXXXXXXXXXXXX

<table>
<thead>
<tr>
<th>Date</th>
<th>Start Time</th>
<th>End Time</th>
<th>Staff Alias</th>
</tr>
</thead>
<tbody>
<tr>
<td>MM/DD/YYYY</td>
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<td>XX:XX</td>
<td>XXXXXXX</td>
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<tr>
<td>MM/DD/YYYY</td>
<td>XX:XX</td>
<td>XX:XX</td>
<td>XXXXXXX</td>
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<td>MM/DD/YYYY</td>
<td>XX:XX</td>
<td>XX:XX</td>
<td>XXXXXXX</td>
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<td>MM/DD/YYYY</td>
<td>XX:XX</td>
<td>XX:XX</td>
<td>XXXXXXX</td>
</tr>
<tr>
<td>MM/DD/YYYY</td>
<td>XX:XX</td>
<td>XX:XX</td>
<td>XXXXXXX</td>
</tr>
</tbody>
</table>

Figure 12 – Appointment Conflicts Report

Sort Criteria (Major to Minor):

- Date (Ascending)
- Staff Alias (Ascending)
- Start Time (Ascending)

Calculations:

None

Background Processes:

The system generates the report above based upon the processing described in the Hours of Operation – Reduce Day Popup above. The Appointment Conflicts report format shown above will be consistent throughout the Appointment Scheduler module.
Section 1 - 4.2.3 : Update Clinic Services / Activities

Priority: Required

Window: Clinic Services / Activities

Report: No

Narrative:

This window allows users to maintain the Duration in minutes assigned to the services/activities that are performed on a daily basis in each Clinic. The appointment interval for all clinic appointments was entered by the user previously in the Organizational Units – Next Page popup screen. Here, the user enters the Duration (in minutes) for each service/activity. A User logged into the AIM system at the Local Agency level will have the capability to assign duration in minutes to Services and Activities for all clinics within that Local Agency by selecting ALL CLINICS from the Clinics list of values.

Business Rules

- Appointment Intervals will be specific to each clinic.
- Each clinic may have one and only one appointment interval for all the days of the week for that clinic.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
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<tr>
<th>Role Name</th>
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</tr>
<tr>
<td>AS_CLNDR_BLDR</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 4.2.3.1 : Clinic Services / Activities

**Figure 13 - Clinic Services / Activities**

**Fields**

**Clinic** - Clicking on the list of values button allows the user to select a Clinic to assign service and activity durations. A User logged into the AIM system at the Local Agency level will have the capability to assign duration in minutes to Services and Activities for all clinics within that Local Agency by selecting ALL CLINICS from the Clinics list of values. For more information, please refer to the Organizational Units window in Operations Management. This field is mandatory.

**Service/Activity Duration (Minutes)** - The time allotment is the number of time intervals needed to perform a service or activity in the displayed Clinic. For more information, please refer to the Narrative section above. This field is mandatory.

**Code** - Clicking on the list of values button allows the user to select a service or activity to assign to this Clinic. For more information, please refer to the Activities window and the Program Services window. This field is mandatory.

**Service/Activity** - Defaults when the service or activity is selected from the Code field above. This field is display only.

**Appt. Interval** – This field displays the appointment interval in minutes that was entered in the clinic’s Organizational Units screen in the Operations Management module. This field is display only.

**Comment** - The user may provide additional comments or remarks. This field is optional.
Calculations:

None

Background Processes:

None

Field to Column Mapping:

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
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</tr>
</tbody>
</table>
Appointment Scheduler

Section 1 - 4.3 : Staff Schedule

Section 1 - 4.3.1 : Staff Order

Priority: Required

Window: Staff Order

Report: No

Narrative:

This is the screen for the user to assign a numeric value to each staff member’s alias within a clinic. The value will be used to determine the order in which the staff member’s alias appears from left to right in both the Staff Day tab columns and the Appointment Sheet.

Business Rules

- Every staff member who has an End Date in the O_STAFF_MEMBER table less than today’s date will not appear in the list of values on the Staff Order screen.
- Staff Members assigned a value of 0 (zero) will not appear in either the Staff Day or Appointment Sheet screens for the selected clinic.
- A Staff Member may have different values assigned for the Order in 2 different clinics.
- If all staff within the clinic are assigned the same value, the system will sort the appearance of the staff alias from left to right on the Staff Day and Appointment sheets based upon the Staff Id. The lowest will appear on the left and the highest on the right.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

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<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
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</thead>
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<td>AS_CLNDR_BLDRL</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 4.3.1.1 : Staff Order

Figure 14 - Staff Order

Fields

Clinic - The user selects the name of the clinic from the list of values that the order value for this staff member will relate to. The clinics available will be based upon the Local Agency and clinic the user logged into. This field is mandatory.

Staff – The user is able to view the staff for every staff member with an End Date in O_STAFF_MEMBER less than the current date for the selected clinic. This field is display only.

Alias – The user is able to view staff alias for every staff member with an End Date in O_STAFF_MEMBER less than the current date for the selected clinic. This field is display only.

Order

Mon - Fri – The user enters the numeric value (up to 3 digits) in these fields, which determine the order in which the Staff Alias will display in the Staff Day and Appointment Sheet screens for that particular day of the week.

Calculations

The system will require that the END_DATE for each staff member in the O_JOB_DESCRIPTIONS table is null or greater than the current SYSDATE in order to display the Staff Name and Alias on the Staff Order screen.

Background Processes

N/A
Field to Column Mapping:

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
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<td>Staff</td>
<td>O_STAFF_MEMBER</td>
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</tr>
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<td>Alias</td>
<td>O_STAFF_MEMBER</td>
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</tr>
<tr>
<td>Order</td>
<td>AAS_APPT_ORDER</td>
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</tr>
<tr>
<td>Comment</td>
<td>AAS_APPT_ORDER</td>
<td>NOTES</td>
</tr>
</tbody>
</table>
Appointment Scheduler

Section 1 - 4.3.2 : Staff Day

Priority: Required

Window: Staff Day

Report: No

Narrative:

This is the screen on which the Staff Member’s daily activities for a clinic are entered.

The Staff Day is used to create the default clinic weekday schedule for each staff member within a clinic. The Staff Day schedule is used to fill the calendar shown on the Staff Scheduler screen. Staff and their alias must be entered in the Operations Management Staff Data screen and assigned to a Clinic to make them available on the Staff Day screen. The maximum number of Alias’ that can be displayed on the screen at one time in the Staff Day screen is seven (7). A horizontal scroll bar displays to view a clinic Staff Day staffed with more than 7 positions.

The user has the capability to select a day value from the list of values in the Day of Week field. The purpose of this is to allow the user to create a day of staffing services/activities for all staff assigned to a clinic, then click the Copy Day popup and reuse that day’s services/activities for multiple days of the week in a clinic.

Business Rules

- The Staff Member only appears on the Staff Day Tab until the date entered in the End Date field of the Staff Data screen. For example, if a staff member no longer works in a clinic after 9/17/03, then the staff member’s alias will not appear in the Staff Order Tab and consequently the Staff Day Tab for that selected clinic after the 17th.
- The Staff Member will only appear in the Staff Day Tab if the user enters a value in the Staff Order Tab for that staff member greater than 0 (zero).
- The times shown by the intervals on the left of the grid will span the times assigned by the user in the Hours of Operation screen for that clinic.
- The Staff Day services/activities cannot span beyond the Hours of Operations.
- Staff Days entered by the user for a selected clinic are specific for that clinic. They cannot be copied and used by other clinics in the Local Agency.
- The AIM system will not prevent a user from setting up staff schedules having the same staff member scheduled at two 2 different clinics on the same day or the same time.
- The user will be able to select both Services and Activities to assign to the time slots.
- “Not Available” will be an Activity selection the user can assign to a cell so the time slot for that staff member will not have any appointments scheduled for it.
- “Not Available” will be the default value filled in each cell in the Staff Day screen when the user enters for the first time.
- “Not Available” will be the default value in the list of values for the service/activity field.

**Data Current As Of:** Run Time

**Frequency:** On Demand

**Role(s):**

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
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</tr>
<tr>
<td>AS_CLNDR_BLDR</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 4.3.2.1 : Staff Day

![Staff Day](image)

**Fields**

**Clinic** – The user selects the name of the clinic from the list of values. The clinic selected will show the staff members assigned to that clinic and the user creates a staff day for that clinic’s staff. The clinics available in the list of values will be limited based upon the Local Agency and the user entered in the Logon screen. This field is mandatory.

**Day of Week** – The user selects from a list of values here the day of the week for which the staff day is being created. If the user selects Wednesday, then the services/activities shown for a staff member will be the services/activities she is assigned to perform during the corresponding time slots.

The screen allows the user to create a day of staffing activities for all staff assigned to a clinic, then click the Copy Day push button and reuse that day’s services/activities for multiple days of the week in a clinic. This field is mandatory.

**Staff Names/Times** – The alias of the staff assigned to each clinic in the Staff Data screen in Operations Management will appear at the top of each column of the time slot section. If five staff members are assigned to a clinic then the staff member’s alias, which is created and stored in the Staff Data screen of the Operations management module, will appear.

**Service** – The user selects the service or activity that she wants to populate in a time slot for a staff member. The user will mouse click in every time slot that the staff member is providing that selected service or activity for the Day of the Week shown. To input the service into a continuous set of time slots (i.e 1pm – 3pm) the user will highlight the first time slot in the range by clicking the mouse button and holding it down, then drag the mouse down to the last cell desired and release the mouse button.
Push Button(s):

**Copy Day** – When the user selects this push button, a popup will display allowing the user to select the days of the week to copy the selected staff day over to.

Calculations:

None

Background Processes:

When the user enters the Staff Day screen for the first time for a clinic, the system displays the Appt Interval at the right and the staff Alias’ at the top of the columns by pulling the necessary field values for the Clinic from the `O_ORGANIZATIONAL_UNITS` and `O_STAFF_MEMBER` tables.

When the user has completed entering the necessary services/activities for one or more staff days, s/he clicks the save icon and the system will save the cells filled and unfilled alike in the `AAS_STAFF_DAYS` table.

Field to Column Mapping:

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinic</td>
<td><code>O_ORGANIZATIONAL_UNITS</code></td>
<td>NAME</td>
</tr>
<tr>
<td>Day of Week</td>
<td><code>AAS_STAFF_DAYS</code></td>
<td>DAY_OF_WEEK</td>
</tr>
<tr>
<td>Staff Names</td>
<td><code>AAS_STAFF_DAYS</code></td>
<td>SM_STAFF_MEMBER_ID</td>
</tr>
<tr>
<td>Times</td>
<td><code>AAS_STAFF_DAYS</code></td>
<td>SD_START_TIME</td>
</tr>
<tr>
<td></td>
<td></td>
<td>SD_END_TIME</td>
</tr>
<tr>
<td>Service / Activity</td>
<td><code>AAS_STAFF_DAYS</code></td>
<td>AS_CS_CLSERV_CODE</td>
</tr>
</tbody>
</table>
Section 1 - 4.3.2.2 : Staff Day - Copy Day Popup

Check Boxes

Monday – Sunday - The user selects the day of the week she wants to copy the entered day’s schedule to. Multiple days can be copied by selecting more than one day of the week check box.

Push Buttons

Copy – The user clicks this button to copy the desired Staff Day to the days of the week checked off to the left. The system then exits the user from this popup and returns to the Staff Day Tab. Cancel – The user clicks this button to exit the Copy Day Popup without performing any copying functions. The system exits the user from this popup without saving the selections, then returns the user to the Staff Day Tab.

Calculations

None

Background Processes

The system will take into account the day of the week the user is copying from when choosing the days the schedule will be copied into. If the user selects the Staff Day for Monday in the previous screen and also clicked the check box here to copy the Monday services/activities to Monday, the system will not recopy the day over to Monday, it will use the services/activities for Monday it
already has stored. It will then copy the Monday services and activities to any of the other days selected by the user in the popup.
If the clinic hours and staff days are not consistent for any particular day of the week, a popup flags the user that the day will not be copied if the staff and/or the clinic hours do not match the day being copied.

Pop-Up Messages

“Staff Day will not be copied to (day of the week) because the hours of operation do not match.”

“(Full name of Staff) does not have a staff order for (day of the week) and will not be scheduled.”

Field to Column Mapping:

N/A
Appointment Scheduler

Section 1 - 4.3.3 : Staff Scheduler

Priority: Required

Window: Staff Scheduler

Report: No

Narrative:

This is the screen for creating a basic monthly schedule for a staff member based upon the Staff Day information entered in the previous tab.

The Staff Scheduler screen is used to modify and create/publish a default monthly schedule for staff member’s availability/capability to perform services and activities. The staff member’s schedule will be shown in the Appointment Sheet. The Staff Day for each staff member in a clinic must be created before using the Staff Scheduler screen.

The user can select the clinic, month, and staff and enter the year for which they want to create a monthly schedule. To facilitate the need to build several months out, the system allows the user to simply select the next month to build the schedule for from the Month field’s list of values and then click the Fill Month push button again.

Business Rules

- The user must enter in Staff Day information for a staff member in order for the system to display the staff member’s alias in the Staff Scheduler screen. Also, the staff must have an Order value greater than zero on the Staff Order screen.
- The user will be able to create a schedule for one or all staff within a clinic for one selected month at a time.
- The user will be able to clear a schedule for one or all staff within a clinic for a selected month.
- The system will not allow a user to either fill or clear a selected month for staff member that already has appointments scheduled for the clinic.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIEWER</td>
<td>Y</td>
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<td>CNW</td>
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<tr>
<td>Role</td>
<td>Permission</td>
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<td>-----------------------------</td>
<td>------------</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>Y</td>
</tr>
<tr>
<td>SA_VIEWER_2</td>
<td>Y</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
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<td>AZ_DEVELOPER</td>
<td>Y</td>
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<td>SUPERINTENDENT</td>
<td>Y</td>
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<tr>
<td>SYSADM</td>
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<td>APPT_SCHEDULER</td>
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<td>FI_ISSUER</td>
<td>Y</td>
</tr>
<tr>
<td>BF_COUNSELOR</td>
<td>Y</td>
</tr>
<tr>
<td>AS_CLNDR_BLDR</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 4.3.3.1 : Staff Scheduler

Fields

**Clinic** - The user selects the name of the clinic from the list of values. The clinic selected will have the selected staff member’s default Staff Day services and activities assigned to that clinic for the month and year entered by the user. This field is mandatory.

**Year** - The user selects the calendar year for which to create the staff member’s Staff Day schedule. This field defaults to the current year. This field is mandatory.

**Month** – The user selects the calendar month for which to create the staff member’s Staff Day schedule. This field defaults to the current Month. This field is mandatory.

**Staff** – The user selects the staff member(s) for whom to create the default monthly schedule. The user will be able to select one or more staff at a time to fill in the selected month’s schedule for all the workers’ Staff Days for the clinic selected. The list of staff will only be those individuals assigned to the clinic selected above.

Push Buttons

**Fill Month for Staff** – The user mouse clicks this push button to create a schedule for the month selected based upon the services/activities entered in the Staff Day Tab.

**Clear Month for Staff** - The user mouse clicks this push button to remove a schedule for the month selected for the staff member(s) for the clinic.

**Close Open Appointments** – The user mouse clicks this push button to close all the open appointments at the selected clinic for the month, year, and staff selected. If staff already have appointments scheduled in the month, year and clinic chosen, the system will leave those appointments untouched and only close the open appointment slots.
Calculations

The system will calculate the dates for each day of the month selected based upon the days of the week given services/activities in the Staff Day screen.

Background Processes

The system will determine that the staff members selected do not already have appointments scheduled for the month being filled/cleared.

If the user attempts to fill or clear the month for a staff member who already has appointments scheduled for that month, the system will display an error message indicating that the appointments for that staff member must be rescheduled prior to clearing the monthly schedule.

Field to Column Mapping:

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinic</td>
<td>AAS_APPOINTMENTS</td>
<td>OU_SEQ_ID</td>
</tr>
<tr>
<td>Year</td>
<td>AAS_APPOINTMENTS</td>
<td>DATE</td>
</tr>
<tr>
<td>Month</td>
<td>AAS_APPOINTMENTS</td>
<td>DATE</td>
</tr>
<tr>
<td>Staff</td>
<td>AAS_APPOINTMENTS</td>
<td>SM_STAFF_ID</td>
</tr>
</tbody>
</table>
Section 1 - 4.3.3.2 : Staff Scheduler – Fill / Clear Month Error Popup

Figure 18 - Staff Scheduler

Push Buttons

**OK** – The user clicks this push button to close the popup error window and return to the Staff Scheduler window.

**Print Conflicts** - The user clicks this button to generate a list of the staff and dates that they have appointments scheduled which are in conflict for the month the user is attempting to fill or close.

Calculations

The system will calculate if the date being generated for the month selected to populate the AAS APPOINTMENTS table already exists on a record in that table for the staff member selected and has a Family ID associated with it, then the system has an appointment for that date and will invoke the error message above.

Background Processes

The system will determine that the staff members selected do not already have appointments scheduled for the month that the user wishes to scheduler or clear. If there are no conflicting appointments scheduled, the system will fill or clear the month without showing the popup above.

If the user attempts to fill or clear the month for a staff member who already has appointments scheduled for that month, the system will display an error message indicating that the appointments for that staff member must be rescheduled prior to clearing the monthly schedule.
The system will also generate a set of results for those staff with appointments scheduled during
the selected month. The results will be available to the user via printed report by pressing the
“Print Conflicts” push button. The report will print to the users default printer and will display
the Staff member’s name and date of the conflict. The error popup will close and the user will
then be free to navigate to the Appointment Sheet for that date and decide if rescheduling
appointments is desired.

Field to Column Mapping:

N/A
Appointment Scheduler

Section 1 - 4.3.4 : Edit Schedule

Priority: Required

Window: Edit Schedule

Report: No

Narrative:

After publishing a monthly schedule for a staff member based upon the Staff Day services and activities information, the user is able to modify a single date on the monthly schedule by clicking that date on the calendar in the Edit Schedule screen.

The staff member’s Appointment Start Time and End Time and service/activity for that day will display under the Daily Schedule section. These times are based upon the Staff Day services/activities that were filled for that day. As appropriate the user may change the start and end times, service/activity and commit the changes by mouse clicking on the save icon. As well the user can fill the entire day’s appointments by clicking the Fill Day push button, and reverse the process by clicking on the Clear Day push button.

When a user desires to make a currently available staff member Not Available for an afternoon, for instance, the user cannot delete the rows for the afternoon in the Daily Schedule section, instead the user must change the service(s) for those rows to Not Available. This logic also applies when modifying staff activities/services each day. The modified activity/service displays for the time and date selected.

Business Rules
- The system will only allow the user to close days for the clinic, which she is logged into.
- The system will only allow the user to fill or close a day’s services and activities if the staff member(s) selected do not have any appointments scheduled for that date.
- The system will allow a user to modify the schedule for a staff member for one clinic at a time. Staff Members who work at multiple clinics will have to have their schedules edited for each clinic at which they work.
- When the user, who is logged in at the Local Agency level “00,” selects the “ALL CLINICS” value for the Staff, the system will only allow the user to perform the Fill Day or Clear Day functions. The system will not allow the user to modify individual hours within a day when ALL CLINICS is selected.
- Dates that the Clinics are closed will show in the Edit Schedule screen. The system will display an “X” on that date, whenever the calendar for that month is selected to visually indicate to the user the Office is closed that date.

Data Current As Of: Run Time
**Frequency:** On Demand

**Role(s):**

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>CNW</td>
<td>Y</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>Y</td>
</tr>
<tr>
<td>SA_VIEWER_2</td>
<td>Y</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>Y</td>
</tr>
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<td>SUPERINTENDENT</td>
<td>Y</td>
</tr>
<tr>
<td>SYSADM</td>
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<td>APPT_SCHEDULER</td>
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<tr>
<td>FI_ISSUER</td>
<td>Y</td>
</tr>
<tr>
<td>BF_COUNSELOR</td>
<td>Y</td>
</tr>
<tr>
<td>AS_CLNDR_BLDR</td>
<td>N</td>
</tr>
</tbody>
</table>
**Section 1 - 4.3.4.1** : Edit Schedule

![Schedule Editor](image)

**Fields**

**Clinic** - The user selects the name of the clinic from the list of values. The clinic selected will have the selected staff member’s default monthly schedule assigned to that clinic for the month and year entered by the user. This field is mandatory.

**Staff** – The user selects the staff member for whom to create the default monthly schedule. The list of staff will only be those individuals assigned to the clinic selected above. The user will have the option to select the “ALL STAFF” value.

**Start Time** – The start time(s) for the staff member’s service/activity to be performed on the date selected on the calendar above. This field is display only.

**End Time** – The end time(s) for the staff member’s service/activity to be performed on the date selected on the calendar above. This field is display only.

**Service** - The service or activity that the staff member is capable of performing on that calendar date for the start and end times shown in each row. The service/activity is populated initially based upon the Staff Day and schedule created for the staff member. The user can then modify the service activity for a particular day using this field. This field is mandatory.

**Push Buttons**

- Fill Day
- Clear Day
- Close Open Apps
**Fill Day** - The user clicks this button to create the schedule for the selected staff or ALL STAFF for the selected Calendar date. The services the staff member(s) can provide is based upon the information entered in the Staff Day for the staff member(s).

**Clear Day** – The user clicks this button to prevent the selected Calendar date from having appointments scheduled to it. This day will not show up in the appointment book (appointment sheet) when the user selects dates from the calendar.

**Close Open Appts** – The user clicks this button to close all the open appointments for the staff member(s) selected for that day. When the user selects a single staff member and a date from the calendar, the system will display the schedule for that staff member in the Daily Schedule section at the bottom left of the screen. Clicking the Close Open Appts button will show the changes in this schedule by marking the open slots to Not Available for the service. The user must click the Save Icon on the toolbar to commit these changes to the database. Additionally, when the user clicks the Close Appts Button, the system will automatically generate a report of the Appointments remaining for that staff member in the clinic for that day.

**Calendar**

- **Year** – Year of the Calendar date that the user is viewing/modifying.
- **Month** – Month of the Calendar date that the user is viewing/modifying.
- **Days (1-31)** – Day of the Calendar date that user is viewing/modifying.

**Calculations**

The system will calculate the end time value to display on the screen based upon the START_TIME and DURATION entered by the user.

**Background Processes**

**Field to Column Mapping:**

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Clinic</td>
<td>AAS_APPOINTMENTS</td>
<td>OU_SEQ_ID</td>
</tr>
<tr>
<td>Staff</td>
<td>AAS_APPOINTMENTS</td>
<td>SM_STAFF_ID</td>
</tr>
<tr>
<td>Date</td>
<td>AAS_APPOINTMENTS</td>
<td>DATE</td>
</tr>
<tr>
<td>Start Time</td>
<td>AAS_APPOINTMENTS</td>
<td>START_TIME</td>
</tr>
<tr>
<td>End Time</td>
<td>AAS_APPOINTMENTS</td>
<td>Calculated from Start Time and Duration</td>
</tr>
<tr>
<td>Service</td>
<td>AAS_APPOINTMENTS</td>
<td>CS_CLINIC_SERVICE_ID</td>
</tr>
</tbody>
</table>
### Section 1 - 4.3.4.2 : Close Open Appointments – Appointments Remaining Report

**Report Date:** MM/DD/YYYY  
**Arizona WIC Program**  
**CLOSE OPEN APPOINTMENTS – APPOINTMENTS REMAINING REPORT**

Clinic: XX XXXXXXXXXXXXXXXXXXX

<table>
<thead>
<tr>
<th>Date</th>
<th>Start Time</th>
<th>End Time</th>
<th>Staff Alias</th>
</tr>
</thead>
<tbody>
<tr>
<td>MM/DD/YYYY</td>
<td>XX:XX</td>
<td>XX:XX</td>
<td>XXXXXX</td>
</tr>
<tr>
<td>MM/DD/YYYY</td>
<td>XX:XX</td>
<td>XX:XX</td>
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<td>MM/DD/YYYY</td>
<td>XX:XX</td>
<td>XX:XX</td>
<td>XXXXXX</td>
</tr>
</tbody>
</table>

**Figure 20 – Close Open Appointments – Appointments Remaining Report**

Sort Criteria (Major to Minor):

- **Date (Ascending)**
- **Staff Alias (Ascending)**
- **Start Time (Ascending)**

**Calculations:**

None

**Background Processes:**

The system generates the report above based upon the user clicking the Close Open Appts push button. Those appointments, which already existed, will be outputted in the report format above.
Section 1 - 4.3.4.3 : Edit Schedule Pop-up

Push Buttons

**OK** – The user clicks this button after having read the popup message from the system indicating the need to move the scheduled appointments from the day that the user wants to fill or clear a staff schedule. The user will have to mouse click the Save icon from the toolbar to commit the changes to the database.

**Print Conflicts** - The user clicks this button to generate a list of the staff and dates that they have appointments scheduled which are in conflict for the day the user is attempting to fill, clear or modify.

Calculations

The system will calculate the date the user has selected to clear or fill. If the date equals a date for an appointment for that staff member in AAS_APPOINTMENTS, the above message will display.

Background Processes

The message above will appear if the user attempts to fill or clear an entire day for which one or more staff member have appointments assigned. The message above will appear if the user attempts to delete a row of services for a staff member when appointments have already been assigned to that time period on that date.

Field to Column Mapping:

N/A
Section 1 - 4.4 : Classes

Section 1 - 4.4.1 : Classes Categories

Priority: Required

Window: Class Categories

Report: No

Narrative:

This window allows users to setup / view the categories that different WIC education classes are assigned. Classes have different focus and purposes and will be based around different topics of education or nutrition. Various types of categories include: Breastfeeding, Nutrition Education, Shopping, etc.

Business Rules

- The values for Class Categories will be state defined and maintained to ensure consistency across Local Agencies

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIEWER</td>
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<td>CNW</td>
<td>Y</td>
</tr>
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<td>SA_OPERATIONS</td>
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<tr>
<td>AS_CLNDR_BLDR</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 4.4.1.1 : Class Categories

Fields

Class Category – The field indicates the four letter alpha code assigned to the Class Category. It is used as a short name to refer to different focuses of group education classes. This field is mandatory.

Description – This field indicates the description of the Class Category. Examples of these descriptions are: Breastfeeding, Nutrition Education, Shopping. This field is mandatory.

Comment – This field shows the Comments associated with each Class Category. This field is optional.

Calculations:

None

Background Processes:

None

Field to Column Mapping:

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
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<tr>
<td>Comment</td>
<td>AAS_CLASS_CATEGORIES</td>
<td>NOTES</td>
</tr>
</tbody>
</table>

Figure 22 – Class Categories
Appointment Scheduler

Section 1 - 4.4.2 : Classes

Priority: Required

Window: Classes

Report: No

Narrative:

This window allows users to create Classes that can be reused again in the future. The user can create these generic classes and later in the Schedule Classes tab, the user may schedule Classes to a specific Clinic, Staff Member, Date, and Time.

A Local Agency Coordinator or designated user who creates the reusable classes can initially enter class information, save the information. The user then selects Create Record from the Record selection on the menu bar. The system will clear the last entered record’s information from the screen. The user then selects Duplicate Record from the menu bar and the system populates the screen with a duplicate of the last record’s information. The user can then modify any information desired such as Clinic name, then save the record. This allows a Local Agency Coordinator to create a generic class one time and apply it to multiple clinics within a Local Agency.

Business Rules
- Users will be able to enter information about classes that will be reusable in the future to assign that class to multiple calendar dates.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
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<td>CNW</td>
<td>Y</td>
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<td>SA_OPERATIONS</td>
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<td>BF_COUNSELOR</td>
<td>Y</td>
</tr>
<tr>
<td>AS_CLNDR_BLDR</td>
<td>N</td>
</tr>
</tbody>
</table>
Figure 23 - Classes

**Fields**

**Class Name** – The user enters or selects the name of the class in this field. If the user is entering the class for the first time for any clinic, the user manually enters the name of the class. If the class exists already for a clinic within the Local Agency, the user can select the class name from the list of values and query for the related class information. The system will only display the Class Names for the Local Agency/Clinic the user is logged into. This field is mandatory.

**Class Category** – The user selects the Class Category code under which the class being entered falls. A class, which educates clients on the use of breast pumps, would have a Class Category of Breastfeeding. This field is mandatory.

**Language** – The user selects the language from the list of values that the class will be taught in. This field is optional.

**Staff Id** – The user selects the ID of the staff member who will be conducting the class. This field is optional.

**Last Name** – The Last Name is displayed for the staff member selected in the ID field. This field is display only.

**First Name** – The First Name is displayed for the staff member selected in the ID field. This field is display only.

**Group Limit** – The user enters the maximum number of unique families that will be scheduled to this type of class. The group limit is not determined by number of clients, it is determined by the number of families based upon the family id. This field is optional.

**Start Time** – The user enters the time that the class will begin on a regular basis. This field is optional.

**End Time** – The user enters the time that the class will end on a regular basis. This field is optional.
**Comment** - This field shows the Comments associated with each Class. This field is optional.

**Calculations:**

None

**Background Processes:**

If the class exists already for a clinic within the Local Agency, the user can select the class name from the list of values and query for the related class information. The user can then select the Create Record and Duplicate Record functions from the menu bar and the system will display a duplicate record for the user. The user can then select the new clinic to save it for and then click the save icon from the toolbar.

**Field to Column Mapping:**

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
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<tr>
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<td>CC_CLASS_CATEGORY_ID</td>
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<td>AAS_CLASSES</td>
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<td>Language</td>
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<td>L_LANGUAGE_CODE</td>
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<td>AAS_CLASSES</td>
<td>SM_STAFF_MEMBER_ID</td>
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<td>START_TIME</td>
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<tr>
<td>End Time</td>
<td>AAS_CLASSES</td>
<td>END_TIME</td>
</tr>
<tr>
<td>Comment</td>
<td>AAS_CLASSES</td>
<td>NOTES</td>
</tr>
</tbody>
</table>
Appointment Scheduler

Section 1 - 4.4.3  : Class Day

Priority: Required

Window: Class Day

Report: No

Narrative:

This window allows users to group classes entered in the Classes Tab together in a single “Class Day” format so multiple classes can be scheduled later in the Schedule Class Days tab at once. In this screen, Classes of different education categories and languages can be assigned to a specific Clinic, and different Staff Members at various Times.

The user will enter the screen and then enter the clinic and name of the Class Day s/he wishes to create. If one already exists, the user can query by the Class Day name. The user will select the category of class first if s/he wishes to reduce the list of values that will appear when selecting the class name, or just select the class they want to commit to a date. After selecting the class, the system will return the information pertaining to the class in the Start Time, End Time, Staff, Language, and Class Limit fields. All these values are based upon the information entered for this Class in the Classes tab. After populating the fields with the generic class information, the user can modify any of the field values, then click the Save icon on the toolbar to save the Class Day to the database.

Business Rules

- A user can create Class Days for a clinic if that user is logged into AIM at the clinic level or the Local Agency level for that clinic.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
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</tr>
</thead>
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<td>Y</td>
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<tr>
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</tr>
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<tr>
<td>SYSADM</td>
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<td>AS_CLNDR_BLDR</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 4.4.3.1 : Class Day

**Figure 24 – Class Day**

**Fields**

**Clinic** – The user selects from the list of values the clinic in which the Class Day classes will be scheduled. This field is mandatory.

**Class Day** – The user enters the new Class Day name or selects a previously created one from the list of values for the class s/he will schedule. This field is mandatory.

**Class Category** – The user selects the Class Category from the list of values if s/he wants to reduce the list of classes that will appear in the Class Name list of values. This field is mandatory.

**Class Name** – The user selects from the list of values the name of each class they will schedule. The Start Time, End Time, Staff Alias, Language, and Group Limit information previously entered on the Classes tab for this class will populate the fields. The user will have the ability to modify the information displayed for each class. This field is mandatory.

**Start Time** – The start time of the class appointment will either be entered by the user or populated with a value based upon the information previously entered for the class. This field is modifiable. This field is mandatory.

**End Time** – The end time of the class appointment will either be entered by the user or populated with a value based upon the information previously entered for the class. This field is modifiable. This field is mandatory.

**Staff** – The staff alias of the staff person running the class with either be entered/selected by the user or populated with a value based upon the information previously entered for the class. This field is modifiable. This field is mandatory.

**Language** – The language the class will be conducted in will either be entered/selected by the user or populated with a value based upon the information previously entered for the class. This field is modifiable. This field is mandatory.
**Class Limit** – The Class Limit of the class will either be entered/selected by the user or populated with a value based upon the information previously entered for the class. This field is modifiable. This field is mandatory.

*Push Button(s):*

**Save Icon** – The user clicks this button after selecting/entering all the information necessary in the above fields to determine the who, what, where and when (staff, category, clinic time, language and group limit) of the Class Day classes. This allows the user to save the Class Day to the database and in the future query on the Class Day name and auto fill all the classes’ information for it.

*Calculation:*

*N/A*

*Background Processes:*

N/A

*Field to Column Mapping:*

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<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
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<td>Class Day</td>
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<td>AAS_CLASSES</td>
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<td>Staff</td>
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<td>Group Limit</td>
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<td>CLASS_LIMIT</td>
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</tbody>
</table>
Appointment Scheduler

Section 1 - 4.4.4 : Schedule Class Days

Priority: Required
Window: Schedule Class Days
Report: No
Narrative:

This window allows users to schedule the classes grouped together in the Class Day tab to actual calendar dates.

The user will enter the screen and then perform a query for the Class Day they want to schedule a date or multiple dates. The user can view the other Class Days stored for the clinic by using the VCR buttons on the toolbar to select the next or previous Class Day for that clinic. The Class Day information will carry over from the Class Day screen when navigating from Class Day to Schedule Class Day. After selecting the Class Day, the user selects a date or multiple dates by clicking in the calendar, and then clicks the Save Icon to schedule the Create Appointments push button.

When a user wants to schedule the Class Day to a day of the week over multiple months, s/he will click the Monthly push button. This will invoke the Schedule Monthly popup. The user will enter in the year, select the month(s) and day(s), and then click the Schedule push button. This will exit the user from the screen. The user must press the Save icon from the toolbar to finally commit the records to the database.

Business Rules
- A user can schedule classes for a clinic if that user is logged into AIM at the clinic level or the Local Agency level for that clinic.
- Classes within a Class Day can only be assigned to a staff, time and date if that staff member has had a schedule created for that time and date.

Data Current As Of: Run Time
Frequency: On Demand

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<td>CNW</td>
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<td>SA_OPERATIONS</td>
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<tr>
<td>AS_CLNDR_BLDR</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 4.4.4.1 : Schedule Classes

Figure 25 – Schedule Classes

Fields

Clinic – The user selects from the list of values the clinic in which the class will be scheduled. This field is mandatory.

Class Day – The user selects from the list of values the Class Day s/he wants to schedule to specific calendar dates. The Class Day was established as a grouping one or more classes the user in the Class Day tab. This field is mandatory.

Date(s) Selected – This field displays the dates the user has selected from the Calendar to schedule the Class Day classes. The dates in this field can be removed by the user highlighting a date and clicking the Remove icon from the toolbar. This field is mandatory.

Push Button(s):

Schedule Monthly – The user clicks this button after selecting/entering all the information necessary in the Clinic and Class Day fields. This push button will invoke the Schedule Monthly popup that allows the user to schedule the class to multiple days of the week and across multiple months.

Go – The user clicks this button after selecting dates from the Calendar to schedule the Class Day classes.

Calculation:
The system will determine that the date selected by the user from the calendar is equal to a date value on records in the AAS_APPOINTMENTS table for that staff member.

**Background Processes:**

The system will determine that a corresponding appointment record exists in the AAS_APPOINTMENTS table and update the CS_CLINIC_SERVICE_ID value to that of a GroupEd service, when the Save Icon is selected from the toolbar. If a class is published and modifications are made to the Class Day of classes and re-published over existing published classes, the previously published class will need to be removed/deleted before applying changes.

**Pop-Up Messages:**

“One or more classes are already scheduled between (time period) on (date). Delete these classes or select another time.”

**Field to Column Mapping:**

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
<tbody>
<tr>
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<td>AAS_CLASS_APPT</td>
<td>OU_SEQ_ID</td>
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<tr>
<td>Class Day</td>
<td>AAS_CLASS_APPT</td>
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</tr>
<tr>
<td>Dates Selected</td>
<td>AAS_APPOINTMENTS</td>
<td>START_TIME</td>
</tr>
</tbody>
</table>
Section 1 - 4.4.4.2 : Schedule Class Day – Schedule Monthly Popup

Figure 26 – Schedule Class Day – Schedule Monthly Popup

Fields

Year – The user enters the year s/he wants to schedule the Class Day classes. This field is mandatory.

Check Box(es):

Months – The user selects the months s/he wants to schedule the Class Day classes by clicking one or more check boxes.
Days – The user selects the days of the week s/he wants to schedule the Class Day classes by clicking one or more days.

Push Button(s):

OK – The user clicks this button after entering the year and selecting all days of the week and months to schedule the Class Day classes.
Cancel – The user clicks this button to return to the Class Day screen without performing any monthly schedule for the Class Day classes.

Calculation:
The system will determine that the dates selected by the user from the calendar is equal to a date value on records in the AAS_APPOINTMENTS table for that staff member(s) selected for each class.

Background Processes:

The system will determine that a corresponding appointment record exists in the AAS_APPOINTMENTS table and update the CS_CLINIC_SERVICE_ID value to that of a Group Ed service, when the Schedule button is selected.
Section 1 - 5 : Appointments

Section 1 - 5.1 : Update Appointments

Priority: Required

Window: Family Record, Appointment Notices, Things to Bring, Client/Family Lookup, Appointment Sheet, Class Assignments, Class Attendance

Report: No (See samples of notices below)

Narrative:

Overview

The Appointment Scheduler module in general, and the Update section in particular, provides a number of automated and manual functionalities to the end user:

- Several of the update windows contain the Family ID field. When the user double clicks on this field, he/she is integrated with the Client Search functionality from the Enrollment and Certification section which provides the ability to find a Family's ID by searching on a variety of parameters.

- During the course of setting up the appointment scheduler tables and scheduling appointments, the system provides extensive help features in the form of on-line user help, hint text and system generated pop up windows which allow the user to review system validations and if necessary override system functions.

- Automatic deletion of future appointments (defined as having an appointment date of SYSDATE + 1) for Clients who have been transferred from a permanent Clinic.

- Maintenance of appointment schedules and appointment records by Local Agency Coordinators for each Clinic in their Local Agency when logged into the system at the Clinic level

- Ability to enter and store remarks and comments about Client appointments.

- Automatic updating of appointment statuses based upon whether client record was modified during the appointment day.

The Appointment Sheet window’s Available Appointment Search mechanism allows the user to search the database using the Clinic, Staff, Service/Activity, and Language fields based on the needs of the Clients within a Family and displays for the user the cell in the Appointment Sheet that fits the search criteria.
The Appointment Sheet’s Appointment information section allows the user to select services for each family member for an appointment and the user can also manually change Pending appointments to a Missed or Kept status.

**Data Current As Of:** Run Time

**Frequency:** On Demand

<table>
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<tr>
<th>Role Name</th>
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<tr>
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Appointment Scheduler

Section 1 - 5.1.1 : Family Record

Priority: Required

Window: Family Record

Report: No

Narrative:

The Family Record window is the starting point for a user to schedule an appointment for a family.

The user will either enter the Family ID in the block at the top of the screen or double click in the Family ID field in order to jump to the Client/Family Lookup screen to find the Family ID. After selecting the appropriate family, the user will be brought back into the Family Record screen with the family information populated in the Family ID / Name field.

The user will be able to view the:
- Family Id
- Client Name of each family member
- Appointment Date, Time and Type of their next/future appointment
- Client’s DOB, Category, Cert Start Date, Cert End Date and Due Date for pregnant clients

As well, the user will be able to view History of Appointments information for the following information about previous client specific appointments:
- Date
- Time
- Services
- Staff
- Status

There are also two push buttons on the Family Record screen, one which allows users to print Appointment Notices and the other which invokes a popup window, which allows users to enter/view client specific Things to Bring.

The Appointment Notices popup allows the user to produce appointment notices based upon the need of the appointment. The user will click the radio button for the desired notice, then click the OK push button to produce the notice immediately. The user can produce either an Appointment Notice or a Reschedule Notice from this window. The selected notice will print out in either English or Spanish depending on the primary language selected for the Authorized Rep 1 in the Family Registration screen.
The Things to Bring window allows the user to view and modify the items, which the Client(s) are required to bring with them to a particular appointment.

**Business Rules**
- The clients will be displayed in the screen with the client having the lowest Client IDs shown at the top and subsequent clients with higher numerical Client IDs in the next rows.

**Data Current As Of:** Run Time

**Frequency:** On Demand

**Role(s):**

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
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<tr>
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</tr>
</tbody>
</table>
Section 1 - 5.1.1.1: Family Record

Figure 27 - Family Record

Fields

Search Block

Family ID / Name – The user either enters the Family ID of the client/family or double clicks on the ID field to jump to the Client/Family Lookup to search for the Family ID. The Last Name, First Name of the Authorized Rep 1 for the family will appear in the display only field to the right of the Family ID. Once the Family ID is found, this information will remain in the top block of the screen as the user navigates through the Appointment Sheet and Classes windows. This field is mandatory.

Client Appt Block – The fields in this block display for the user the next scheduled appointment for each client within the family.

Client – This field displays the client name (last, then first) or each client within the Family ID selected above. This field is display only. The client’s name will display in red if the client has a termination reason of “Death”

Appt Date – This field displays the Appointment Date of the next/future appointment for the client shown in the client name field. This field is display only.

Appt Time – This field displays the Appointment Time of the next/future appointment for the client shown in the client name field. This field is display only.

Appt Type – This field displays the Appointment Type of the next/future appointment for the client shown in the client name field. This field is display only.
Cert Info Block

**DOB** – This field displays the Date of Birth of the client shown in the client name field. This field is display only.

**Cat** – This field displays the Category of the client shown in the client name field. This field is display only.

**Cert Start** – This field displays the Certification Start Date of the client shown in the client name field. This field is display only.

**Cert End** – This field displays the Certification End Date of the client shown in the client name field. This field is display only.

**Due Date** – This field displays the Estimated Delivery Date of the pregnant client shown in the client name field. This field is display only.

Appointment History Block

**Date** – This field displays the Date of the historical appointment for the client name the user clicks to highlight in the client name field. This field is display only.

**Time** – This field displays the start time of the historical appointment for the client name the user clicks to highlight in the client name field. This field is display only.

**Type** – This field displays the service of the historical appointment for the client name the user clicks to highlight in the client name field. This field is display only.

**Staff** – This field displays the name of the staff member who performed the appointment for the client name the user mouse clicks to highlight in the client name field. This field is display only.

**Status** – This field displays the Status of the historical appointment for the client name the user clicks to highlight in the client name field. This field is display only.

**Notes** – This field allows the user to enter and view the notes for each appointment. This field is optional.

Push Button(s)

**Bring** – This button allows the user to view/enter Things to Bring which pertain to the client’s next/future appointment.

**Notice** – This button allows the user to view the Appointment Notices Popup window in which the user can select either an Appointment Notice or Reschedule Notice to print. Note: The appointment notice will print information on one notice for all Family members with the same Appointment Date.

Calculations

None

Background Processes

The system will query the Certification and Appointment Scheduler tables below in order to display the results information to the user on the screen.

Field to Column Mapping:

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<th>Screen Field</th>
<th>Database Table</th>
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<td>------------------</td>
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<td>SM_STAFF_MEMBER_ID</td>
</tr>
<tr>
<td>Status</td>
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<td>AS_ATTEND_STATUS_CODE</td>
</tr>
</tbody>
</table>
Appointment Scheduler

Section 1 - 5.1.2: Client/Family Lookup

Priority: Required

Window: Client/Family Lookup

Report: No

Narrative:

This screen is the same Client/Family Lookup screen that is used in the Enrollment and Certification module of the AIM system.

The Client/Family Lookup screen is used here to allow the user to find a client so that he/she can be scheduled for an appointment.

As explained in the Family record screen narrative above, the user will double click in the family ID field in the Family Record screen and “jump” to the Client/Family Lookup screen. Double clicking on the desired Client ID or Family ID in the results section will “jump” the user back to the Family Record screen with the ID and Authorized Rep 1’s last name and first name populated.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
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<tr>
<td>VIEWER</td>
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</tr>
<tr>
<td>CNW</td>
<td>N</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>CSF_DATA_ENTRY</td>
<td>N</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
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<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>NUTRITIONIST_1</td>
<td>N</td>
</tr>
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<td>APPT_SCHEDULER</td>
<td>N</td>
</tr>
<tr>
<td>FI_ISSUER</td>
<td>N</td>
</tr>
<tr>
<td>BF_COUNSELOR</td>
<td>Y</td>
</tr>
</tbody>
</table>
Section 1 - 5.1.2.1 : Client/Family Lookup

Figure 28 - Client/Family Lookup

Fields

Client Id - The unique identification number to identify a Participant. This field is optional.
Last Name - The last name of the Participant. This field is optional.
First Name - The first name of the Participant. This field is optional.
MI 1 - The first middle initial of the Participant. This field is optional.
MI 2 - The second middle initial of the Participant. This field is optional.
Birth Date - The birth date of the Participant. This field is optional.
Category - The category that the Participant belongs to. This field is optional and can be selected from a list of values. For more information, please refer to the Category table.
Gender - The gender of the Participant. This field is optional and can be selected from a list of values. This list is domain driven and is not maintained in a base table.
Family ID - A unique, system generated identifier for the family economic unit. This field is optional.
Authorized Representative Last Name - The last name of the authorized representative. This field is optional.
Authorized Representative First Name - The first name of the authorized representative. This field is optional.
Phone - The telephone number of the authorized representative. This field is optional.
Phone Type - The phone type (i.e., home, beeper, fax, modem, etc.). This field is mandatory if the Phone is filled in, and it can be selected from a list of values. For more information, please refer to the Phone Type table in System Administration.
Mailing Address - The mailing address of the authorized representative. This field is optional.
Cert Start Date - The starting date of certification. This field is optional.
Cert End Date - The ending date of certification. This field is optional.
Local Agency - The organizational unit that serves as the local agency for the Participant. This field is optional and may be selected from the list of values. For more information, please see the Organizational Units table in Operations Management.

Clinic - The organizational unit that serves as the clinic for the Participant. This field is optional and may be selected from the list of values. For more information, please see the Organizational Units table in Operations Management.

City - The city address. This field is mandatory and may be selected from the list of values. For more information, please see the Locales table in System Administration.

County - The county address. This field is optional and may be selected from the list of values. For more information, please see the County table in System Administration.

State - The state address. This field is optional.

Zip - The five digit zip code. This field is optional and may be selected from the list of values. For more information, please see the Zip Codes table in System Administration.

Zip+4 - The additional four digit zip code. This field is optional.

Prior Id - The participant’s prior unique identification number from the PDA legacy system. This field is optional.

CSF Clinic - If the client is a CSF participant, the organizational unit that serves as the local agency for the Participant. This field is optional and may be selected from the list of values. For more information, please see the Organizational Units table in Operations Management.

Fields (Results section)

Client Id - The unique identification number to identify a Participant. This field is display only. This field is displayed in red for current CSF participants. Double clicking this field closes this window and displays this participant’s information in the function that invoked the Participant/Family Lookup window. If this window was invoked from the menu, double clicking this field closes this window and displays this participant’s information in the Participant Registration window.

Family ID - A unique identifier for the family economic unit. This field is display only. Double clicking this field closes this window and displays the family information in the function that invoked the Participant/Family Lookup window. If this window was invoked from the menu, double clicking this field closes this window and displays this family’s information in the Family Information window.

Last Name - The last name of the Participant. This field is display only.

First Name - The first name of the Participant. This field is display only.

MI 1 - The first middle initial of the Participant. This field is display only.

MI 2 - The second middle initial of the Participant. This field is display only.

Birth Date - The birth date of the Participant. This field is display only.

Cat. - The category that the Participant belongs to. This field is display only.

Gender - The gender of the Participant. This field is display only.

L.A. - The local agency that the family is registered in. This field is display only.

Clinic - The clinic that the family is registered in. This field is display only.

CSFP Clinic - The CSF clinic that the family is registered in.

Authorized Representative Last Name - The last name of the primary authorized representative. This field is display only.

Authorized Representative First Name - The first name of the primary authorized representative. This field is display only.

Cert. Start Date - The starting date of the latest certification. This field is display only.

Cert End Date - The ending date of the latest certification. This field is display only.

Mailing Address - The mailing address of the primary authorized representative. This field is display only.
**City** - The city address. This field is display only.

**County** - The county address. This field is display only.

**State** - The state address. This field is display only.

**Zip** - The five digit zip code. This field is display only.

**Zip+4** - The additional four digit zip code. This field is display only.

*Push Button(s)*

*Calculation(s)*

None.

*Background Process(es)*

Double clicking in the Family ID field of the Results section will return the user to the Family record screen and automatically populate the Family ID and Name of the Authorized Rep 1 in the block at the top of the screen.

Double clicking in the Client ID field of the Results section will return the user to the Client Registration screen and automatically populate the Family ID and Name of the Authorized Rep 1 in the block at the top of the screen, as well as the Client ID and Name of the participant in the Client section of the screen.

*Field to Column Mapping:*

N/A
Section 1 - 5.1.2.2 : Family Record-Things to Bring pop up

**Figure 29 – Family Record-Things to Bring pop up**

**Fields**

**Description** - Clicking on the list of values button allows the user to select the items the Participant should bring to the appointment. For more information, please refer to the Things to Bring window. This field is optional.

**Push Button(s)**

**OK** – Saves the Things to Bring selected by the user and exits the user from the current popup window.

**Cancel** – Exits the user from the popup window without committing any changes made.

**Calculation(s)**

None.

**Background Process(es)**

None.

**Field to Column Mapping:**

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Description</td>
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<td>AS_1_ITEM_CODE</td>
</tr>
</tbody>
</table>
Section 1 - 5.1.2.3 : Family Record-Appointment Notices

Figure 30 – Family Record-Appointment Notices

Radio Button(s)

Appointment Notice - This button produces a notice, which informs the Participant that they have an appointment scheduled to receive services.

Reschedule Notice - This button produces a notice to inform a Participant of an appointment rescheduled based upon Clinic circumstances.

Push Button(s)

OK – The user clicks this button to print the selected type of appointment notice and then the system exits the user from the current popup window.

Cancel – The user clicks this button to exit the current popup window without printing an appointment or reschedule notice.

Calculation(s)

None.

Background Process(es)

The Appointment or Reschedule Notice that is printed is based on the Primary Language of the family. If the families’ Primary Language is Spanish then the Spanish notice will print, otherwise the English notice will print. The Primary Language of the family is established in the Family Information screen of the Enrollment and Certification module.
Field to Column Mapping:
N/A
Section 1 - 5.1.2.4 : Notice of Appointment - English

Notice of Appointment

Date: MM/DD/YYYY

Authorized Representative: XXXXXXXXXXXX XXXXXXXXXXXXX
Address: XXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXX
XXXXXXXXXX, XX XXXXX-XXXX

Dear: XXXXXXXXXX,

Date and time of appointment: MM/DD/YYYY, HH:II (AM or PM)

Appointment For XXXXXXXXXXXX XXXXXXXXXXXXX

Appointment type:
( ) Determination of eligibility
( ) Nutrition Education and issuance of WIC checks
( ) Other

Don’t forget to bring:
XXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXX

Appointment For XXXXXXXXXXXX XXXXXXXXXXXXX

Appointment type:
( ) Determination of eligibility
( ) Nutrition Education and issuance of WIC checks
( ) Other

Don’t forget to bring:
XXXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXX

If you or your family are applying for the WIC Program, you and your family should plan on being at the clinic for approximately 1 hour. If you are late or do not have all the requested information with you, you may be rescheduled. Please call the number listed below to reschedule this appointment as soon as possible if you are unable to keep this appointment.

Sincerely,

Clinic: XXXXXXXXXXXXXXXXXXXX
Address: XXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXX
XXXXXXXXXX, XX XXXXX-XXXX
Phone: (XXX) XXX-XXXX

The United States Department of Agriculture (USDA) prohibits discrimination in its programs on the basis of race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, or marital or family status. (Not all prohibited bases apply to all programs.) Persons with disabilities who require alternative means for communication of program information (Braille, large print, audiotape, etc.) should contact USDA’s TARGET Center at (202) 720-2600 (voice and TDD).

To file a complaint of discrimination, write to USDA, Director, Office of Civil Rights, Room 326-W, Whitten Building, 14th and Independence Avenue, SW, Washington, D.C., 20250-9410 or call (202)-720-5964 (voice and TDD). USDA is an equal opportunity provider and employer.

You and WIC Build Healthy Families!

Figure 31 - Notice of Appointment - English
Section 1 - 5.1.2.5 : Notice of Appointment - Spanish

Aviso de Cita

Fecha: MM/DD/YYYY

Representante Autorizado: XXXXXXXXXXXX XXXXXXXXXXXX
Dirección: XXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXX
XXXXXXXXXX, XX XXXXX-XXXX

Estimada: XXXXXXXXXXX,

Dia y hora de la cita: MM/DD/YYYY, HH:II (AM or PM)
Usted tiene una cita:: XXXXXXXXX
Clase de cita:
  () Determinación de elegibilidad:
  () Educación en Nutrición y Distribución de los cheques de WIC
  () Otro

No se olvide de traer:
XXXXXXXXXXXXXXXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXX

Dia y hora de la cita: MM/DD/YYYY, HH:II (AM or PM)
Clase de cita:
  () Determinación de elegibilidad:
  () Educación en Nutrición y Distribución de los cheques de WIC
  () Otro

No se olvide de traer:
XXXXXXXXXXXXXXXXXXXXXXXXX  XXXXXXXXXXXXXXXXXXX

Si usted o algún miembro de su familia están aplicando para el programa de WIC, usted y su familia deben planear estar en la clínica aproximadamente por una hora. Si llegas tarde o no tienes todos los documentos requeridos, su cita podría ser cambiada para otro día. Si por alguna razón no va a poder asistir a su cita, favor de llamar lo antes posible al número indicado abajo, y le daremos otra cita.

Sinceramente,

Clinica: XXXXXXXXXXXXXXXXXXXX
Dirección: XXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXX
XXXXXXXXXX, XX XXXXX-XXXX
Teléfono: (XXX) XXX-XXXX

El Departamento de Agricultura de los Estados Unidos (USDA), prohíbe discriminación en sus programas respecto a raza, color, origen nacional, sexo, religión, edad, incapacidad, creencias políticas, orientación sexual, o estado familiar o marital. (No todos los datos prohibidos aplican a todos los programas.) Personas con incapacidad que requieren alternativas para comunicación e información del programa, (escritura en relieve, imprenta grande, audiovisual, etc) deben ponerse en contacto con USDA Centro de Target al: (202) 720-2600. Personas con equipo TDD, favor de marcar (202) 720-2600.


¡Usted y WIC Construyen Familias Sanas!

Figure 32 - Notice of Appointment - Spanish
Section 1 - 5.1.2.6 : Notice of Rescheduled Appointment - English

Arizona WIC Program
Appointment Rescheduled Notice

Date: MM/DD/YYYY

Authorized Representative: Xxxxxxxxxx Xxxxxxxxxxxxxxxx
Address: Xxxxxxxxxxxxxxxxxxx
  Xxxxxxxxxxxxxxxxxxx
  Xxxxxxxx, xx xxxxx-xxxx

Dear: Xxxxxxxxxxx,

We are sorry, but we have had to reschedule your next appointment for WIC. Your new appointment is for MM/DD/YYYY at HH:MM (AM/PM). If this is not a good time or day for you to come to your WIC appointment, please call us at (XXX) XXX-XXXX to reschedule for a better day or time.

Sincerely,

Clinic: Xxxxxxxxxxxxxxxxxxxxxxxxxx
Address: Xxxxxxxxxxxxxxxxxxx
  Xxxxxxxxxxxxxxxxxxx
  Xxxxxxxx, xx xxxxx-xxxx
Phone: (XXX) XXX-XXXX

The United States Department of Agriculture (USDA) prohibits discrimination in its programs on the basis of race, color, national origin, gender, religion, age, disability, political beliefs, sexual orientation, or marital or family status. (Not all prohibited bases apply to all programs.) Persons with disabilities who require alternative means for communication of program information (Braille, large print, audiotape, etc.) should contact USDA’s TARGET Center at (202) 720-2600 (voice and TDD).

To file a complaint of discrimination, write to USDA, Director, Office of Civil Rights, Room 326-W, Whitten Building, 14th and Independence Avenue, SW, Washington, D.C., 20250-9410 or call (202)-720-5964 (voice and TDD). USDA is an equal opportunity provider and employer.

Figure 33 - Notice of Rescheduled Appointment - English
Programa de WIC de Arizona

Cambio de Cita

Fecha: MM/DD/YYYY

Representate Autorizado: XXXXXXXXXXXX XXXXXXXXXXXXX
Dirección: XXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXX
XXXXXXXXXX, XX XXXXX-XXXX

Estimada: XXXXXXXXX,

Sentimos mucho, pero hemos tenido que cambiar su próxima cita de WIC para el día MM/DD/YYYY a las HH:MM. Si este día no es conveniente pare usted por favor llamenos al (XXX) XXX-XXXX. Disculpe cualquier inconveniencia que este cambio de cita le haya causado.

Sinceramente,

Agencia Local: XXXXXXXXXXXXXXXXXXXXXXX
Dirección: XXXXXXXXXXXXXXXXXXXXX
XXXXXXXXXXXXXXXXXX
XXXXXXXXXX, XX XXXXX-XXXX

Telefóno: (XXX) XXX-XXXX

El Departamento de Agricultura de los Estados Unidos (USDA), prohíbe discriminación en sus programas respecto a raza, color, origen nacional, sexo, religión, edad, incapacidad, creencias políticas, orientación sexual, o estado familiar o marital. (No todos los datos prohibidos aplican a todos los programas.) Personas con incapacidad que requieren alternativas para comunicación e información del programa, (escritura en relieve, imprenta grande, audiovisual, etc) deben ponerse en contacto con USDA Centro de Target al: (202) 720-2600. Personas con equipo TDD, favor de marcar (202) 720-2600.


¡Usted y WIC Construyen Familias Sanas!

Figure 34 - Notice of Rescheduled Appointment - Spanish
Appointment Scheduler

Section 1 - 5.1.3 : Appointment Sheet

Priority: Required

Window: Appointment Sheet

Report: No

Narrative:

Appointment Sheet

The Appointment Sheet provides the user a number of features:

- The ability to bring up the Available Appointment Search popup window and search for the next available appointment based upon the search criteria listed below.
- The ability to make and edit an appointment for a family; assigning the appointment to a staff member at a clinic for a specific day and time.
- The ability to modify the duration of the family appointment.
- The functionality of moving through the appointment sheet of a clinic from month to month and day to day with the use of the buttons shown on the calendar.
- The ability to quickly scroll through the appointments within a day using the up and down arrows associated with the day’s appointment sheet. The system allows the user to scroll through 4 hours worth of appointments with one mouse click. The ability to “refresh” the calendar day and clear unsaved appointments.

Business Rules

- When a user clicks on the first slot of a family appointment, s/he can click the Re-Schedule / Cancel appointment push button to cut and paste the appointment.
- Clicking on a Class Appointment’s cell, then clicking the Class Attendance Tab will allow the user to view the individual families and clients within a given class.
- Double clicking on a Class Appointment’s cell will alert the user to an option of deleting the class.
- Putting the mouse over the Authorized Rep 1’s name allows the user to view the Family phone number.

Available Appointment Search

The Available Appointment Search popup window allows a user the ability to find the next available appointment by selecting a combination of the following search criteria:
After search is selected, if there are available appointment slots found by the system, the system will return to the Appointment Sheet with the appointment slot meeting the Search criteria shown in Green. The user has previously selected the Family for which she wants to schedule the appointment. The user will click the appointment cell and the system will populate the appointment information section.

If the system determines that no available appointments meet the search criteria, the Available Appointments Search popup will remain open and the user’s search criteria will remain in the cells. The user will then have the option of revising the search criteria, clearing the criteria and re-entering new criteria or canceling the popup and returning to the Appointment Sheet.

After the client information is shown in the appointment information section, the user will select the appointment types for each client within the family. The system will automatically populate the duration field with the appropriate aggregate of time based upon the services selected. The user will then determine if the amount of time shown in the duration section is appropriate for the staff member providing the appointment services to the family of clients. The user can modify the duration to either more time or less time (divisible by the clinic interval) as needed. This will not eliminate any of the family member’s appointments from being done, it will simply reduce the number of appointment slots taken. After the duration is decided, the user will mouse click the save icon on the toolbar to commit the appointment to the database.

**Business Rules**

- A user performing a search for an appointment on a day that does not have a calendar built will see the system display a message indicating that no records were found for the search criteria.
- The **After Date** field value will default to next pickup date for the family based upon the Family’s pickup interval. The date defaulted for the user must be calculated based upon both the Pickup Interval and Date. The system will perform an edit in the Food Package Prescription and On Demand screens, which will update the pickup day for all family members if the day is modified for any one member.
  - If the user enters in the service Cert to find an available appointment for a new certification appointment, the date value will default to today’s date
  - It is modifiable by the user
- The system will provide the user the ability to jump from the On-Demand screen to the Appointment Sheet.

**Reschedule and Delete Appointments**

After making an appointment, a user can delete an appointment by clicking in the top most cell for that appointment and clicking the Re-Schedule / Delete push button. The user will then select the Delete push button from the popup and the Family’s appointment will be deleted from the
appointment sheet grid. The user will then click save to commit the delete appointment action to the system database.

Clicking in the top cell of a Family Appointment will allow the user to select the Re-Schedule/ Delete push button, then click the Re-Schedule push button from the popup. The user will then navigate using the calendar to the date they wish to reschedule the appointment to. The user will mouse click in the appointment slot under the appropriate staff member and the appointment will be pasted. The appointment will not commit to the database until the user clicks the Save Icon from the toolbar.

After making an appointment, a user can delete time off the end of an appointment by clicking in the top most cell for that appointment and modifying the duration time in the Family information section to the right. The user will then click Save Icon to commit the new duration to the system database.

When the user performs a mouse over the Authorized Rep 1’s name at the top of the screen, the system will display the phone number to the right.

If a user clicks on a class appointment’s cell, then clicks the Class Attendance Tab, the system will allow the user to view the individual families and clients within a given class and make modifications to the class attendees.

Deleting Classes

Classes that require modifications to durations of time or dates must first be deleted and re-published with the appropriate information. Only a user assigned the calendar build capability in the System Administration module is able to perform a class deletion.
If the class is scheduled with pending class family appointments, the user will receive an informative message indicating that the appointments will need to be rescheduled/deleted prior to deleting the class.
**Data Current As Of:** Run Time

**Frequency:** On Demand

**Role(s):**

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
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<tbody>
<tr>
<td>APPT_SCHEDULER</td>
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<td>VIEWER</td>
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<td>NUTRITIONIST_1</td>
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</tr>
</tbody>
</table>
Section 1 - 5.1.3.1 : Appointment Sheet

Figure 35 - Appointment Sheet

Fields

Schedule

Family ID / Name – This field contains the Family ID and Last Name, First Name of the Authorized Rep 1 for the family selected early by the user as a result of the Client/Family Lookup search.

Clinic – The clinic defaults to the clinic the user logged into in the AIM Logon screen and has selected a family id belonging to the clinic. This field is mandatory.

Date (on calendar) – The date the user selects to schedule the appointment on. The user populates this field by clicking the calendar to the right on the desired month, year and day. This field is mandatory.

Day – This field is calculated by the system and populated based upon the date entered/selected by the user. This field is display only.

New Appointment Section

Fields

Calendar Dates – The user clicks on these dates to display the Appointment sheet information for the Clinic selected.

Push Button(s)

Available Appt Search – The user clicks this button to engage the Available Appointment Search popup window. The system will allow the user to search based upon various search
criteria related to the appointment they are trying to schedule, including: service, duration, staff, etc.

**Re-Schedule/Cancel** - The user clicks this button to either Re-Schedule or Delete the selected appointment.

**Client Appt Info**

**Fields**

**Date** – This field displays the date of the appointment, which was selected by the user above. This field is display only.

**Time** – The field displays the start time of the family’s appointment. This field is automatically populated by the system based upon the cells selected by the user in the Appointment Sheet to the left. This field is mandatory.

**Staff** – This field displays the Staff member selected to perform the family’s appointment in the Appointment sheet to the left.

**Duration** – The value of the duration of the family’s appointment will be automatically filled based upon the number of cells selected by the user in the Appointment sheet section to the left. As well, the user can change the duration value and the system will modify the number of cells booked for that appointment in the Appointment Sheet. The duration must be a multiple of the default appointment interval setup in the Organizational Units screen for the clinic.

**Client** – This field contains the Last Name, First Name of each client in the Family. The clients will appear from top to bottom in the Client Appt Info section in ascending order based upon their Client ID number. The Last Name and First Name will be displayed in Red/Bold if the client is marked as deceased. This field is display only.

**Type** – The user selects the service to be provided to the client for this appointment. Different clients within the same family may have different services during the same appointment. This field defaults to none. This field is mandatory.

**Status** – The user selects the status of the appointment for the particular client within the family. This field defaults to pending when the user selects an appointment type for the client. If the user does not select an appointment type, the field stays empty. This field is optional.

**Calculations**

When a user clicks on the Today button on the appointment calendar the system displays the Appointment Sheet based upon the calculated SYSDATE.

When the user is focused in an appointment cell, s/he can modify the duration for a particular appointment. The system will calculate the amount of time the user has reduced/expanded the appointment by and either clear or book cells accordingly on the sheet.

The system will calculate that the duration is divisible by the Appointment Interval for the Family’s clinic. If the Appointment Interval is 15 minutes, a user will not be allowed to enter a duration of 40 minutes.

**Background Processes**

The system displays the staff Alias at the top of each column heading on the appointment sheet based upon the clinic for the Family ID shown in the top block.
When the user clicks in an open appointment slot, the system will populate the Appointment Information for the clients within the family in the bottom right of the screen.

Classes that require modifications to durations of time or dates must first be deleted and re-published with the appropriate information. Only a user assigned the calendar build capability in the System Administration module is able to perform a class deletion. If the class is scheduled with pending class family appointments, the user will receive an informative message indicating that the appointments will need to be rescheduled/deleted prior to deleting the class.

Pop-Up Messages

“You do not have the proper role to delete classes. Please contact your supervisor.” - Select OK to return to the Appointment Sheet.

“Are you sure you want to delete this class?” - Select Yes or No. A Yes answer will delete the class if no scheduled families exist, but if families are scheduled the following message displays: “Families have been assigned to this class. Use the Class Attendance screen to remove them before deleting the class.” - A No answer cancels the message and returns the user to the appointment sheet.

Field to Column Mapping:

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
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<td>Family ID</td>
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<td>FAMILY_ID</td>
</tr>
<tr>
<td>Clinic</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>OU_SEQ_ID</td>
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<td>Staff</td>
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</tr>
<tr>
<td>Status</td>
<td>AAS_APPOINTMENTS</td>
<td>ATS_ATTEND_STATUS_CODE</td>
</tr>
</tbody>
</table>
Section 1 - 5.1.3.2 : Appointment Sheet – Family Phone Number

**Figure 36 – Appointment Sheet – Family Phone Number**

**Fields**

**Push Buttons**

None

**Calculations**

None

**Background Processes**

The system displays the Family Phone number for the Authorized Rep 1 when the user moves the mouse pointer over the Family name field at the top of the screen.

**Field to Column Mapping:**

**N/A**
Section 1 - 5.1.3.3 : Appointment Sheet – Office Closed Display

**Fields**

**Appointment Cells** – The system displays the phrase “Office Closed” in the top left cells of the Appointment Sheet screen. The user cannot enter any appointment information on this date. As well, the calendar to the right displays a large X over the calendar date to visually display to the user that the office is closed on that date.

**Calculations**

The system calculates whether the date selected by the user equals any dates in the AAS_Dates_Office_Closed table for the clinic. If so, the Appointment Sheet displays the single cell above indicating: “Office Closed.”

**Background Processes**

None

**Field to Column Mapping:**

N/A
Section 1 - 5.1.3.4: Appointment Sheet – Calendar Not Built Popup

**Fields**

**Push Buttons**

**OK** – The user clicks this button to close Calendar Not Built Popup and return to the Appointment Sheet to select another date to view.

**Calculations**

The system calculates whether the date selected by the user equals any dates in the AAS_APPOINTMENTS table for the clinic. If not, the error message above appears.

**Background Processes**

None

**Field to Column Mapping:**

N/A
Section 1 - 5.1.3.5 : Available Appointment Search

Figure 39 – Available Appointment Search

Fields

Service – The user enters the service type of the appointment that she wishes to use as a criteria in the search. This field is optional.

Staff – The user selects the staff member to use as a criteria in the search. The list of values will only show those staff for the clinic/Local Agency the user logged into. This field is optional.

Language – The user selects the Language to use as a criteria in the search. This will be selected from a list of values. This field is optional.

Search From Date – This is the date after which the system will search for the next available appointment. It defaults to the next pickup date and interval for the client returned in the Client/Family Lookup search. For new Certifications, it defaults to today’s date. It is modifiable by the user. This field is optional.

Day of Week – The user selects the day of the week to use as a search criteria. This is selected from a list of values. This field is optional.

Duration – The user enters the number of minutes of time required for the appointment. This field is optional.

Check Boxes

Morning Appt – The user checks this box if the search should only return an appointment that is after earliest AM appointment for the clinic based upon the Staff member’s schedules and before 12pm.

Afternoon Appt – The user checks this box if the search should only return an appointment that is after 12pm and the latest PM appointment based upon the Staff member’s schedules.
Push Buttons

**Calendar** – The user clicks any date within the calendar to populate the Search From Date field.

**Cancel** – The user clicks this button to close the Find Available Appt window and return to the Appointment Sheet.

**Clear** – The user clicks this button to clear the search criteria information entered, so a new set of criteria can be entered/selected and searched upon.

**Search** – The user clicks this button to perform a search for the next available appointment based upon the search criteria entered above.

Calculations

None.

Background Processes

Based upon the search criteria entered by the user, the system determines if any records in the AAS_APPOINTMENTS table fit the criteria. If not, the system posts an error message. If so, the system closes the popup window and returns the user to the Appointment Sheet with focus on the first appointment cell fitting the criteria.

The system will only return the user to a cell that has no appointment schedule for that cell. Booked appointments will not fit in the search criteria.

Field to Column Mapping:

N/A
Section 1 - 5.1.3.6: Available Appointment Search – No records found message

Figure 40 - Available Appointment Search - No records found message

Fields

OK – The user clicks this button to close the message and return to the Available Appts popup window to revise the search criteria.

Calculations

The system will display the message above if it determines that there are no slots whose duration sums match the duration value entered by the user in the search criteria. The system will calculate an appointment as available if the sum of the intervals in consecutive open slots is greater than the duration entered by the user in the search criteria. If the user is searching for a 30 minute appointment and the system has three 15 minute appointment slots open consecutively for a staff member, the system will calculate the duration search criteria as being met.

Background Processes

The system returns the message above if, based upon the search criteria, there are no records in the AAS_APPOINTMENTS tables that match.

Field to Column Mapping:

N/A
Section 1 - 5.1.3.7 : Appointments-Pending Appointment Scheduled pop up

Figure 41 - Appointments-Pending Appointment Scheduled popup

**Keep** – The user clicks this push button to keep the already scheduled appointment for the family. As well, it exits the user from the current pop up window and returns to the Appointment Sheet.

**Delete** – The user clicks this push button to delete the already scheduled appointment for the family. As well, it exits the user from the current pop up window and returns to the Appointment Sheet.

**Cancel** – The user clicks this button to exit the current pop up window without assigning the appointment for the Family/Client to this Staff Member.

**Calculations**
None.

**Background Processes**
The system performs a search to determine if there exists an appointment with a date greater than or on today’s date with the same Family ID as the one being scheduled and an appointment status of Pending. If so, the system displays this pop up.

If there exist two or more future, pending appointments for the family, the system will display this popup and appropriate appointment information for each instance.

The newly entered family appointment will only commit to the database when the user clicks the save icon from the toolbar.

**Field to Column Mapping:**
N/A
Section 1 - 5.1.3.8 : Appointments-Conflicts Exist pop up

Figure 42 - Appointments-Different Language Pop Up

Figure 43 - Service Conflict Override Pop up

Fields
**OK** - Exits the user from the current pop up window and allows the user to override the Service/Activity Type or Primary Language check and assign this appointment to the Staff Member.

**Cancel** - Exits the user from the current popup window and returns the user to the Appointment sheet to select: a different Service/Activity, staff member or time slot for the appointment.

**Calculations**
None.

**Background Processes**
The system retrieves the Activities/Services assigned to the Staff Member and compares them to the Activity/Service type selected in the Appointments-Main window. For more information, please refer to the Staff Activities/Services window. If the Activity/Service selected is not present in the Staff Member's capabilities, the system displays this pop up.

The system retrieves the languages assigned to the Staff Member and compares them to the primary language of the Participant whose ID was selected in the Appointments-Main window. For more information, please refer to the Participant Registration window in Enrollment and Certification. If the Staff Member selected doesn't have the ability to conduct the appointment in the same language as the Participant's primary language, the system displays this pop up.

**Field to Column Mapping:**
N/A
Section 1 - 5.1.3.9 : Appointment Sheet – Re-Schedule or Delete popup

Push Buttons
Re-Schedule - Exits the user from the current pop up window and removes the family appointment from the appointment sheet so that the user may select another date and appointment slot to paste it into.
Cancel/Delete - Exits the user from the current popup window and removes the family appointment from the appointment sheet. The appointment will not be stored temporarily for the user to paste into another appointment slot.
Nothing - Exits the user from the current popup window and returns the user to the Appointment sheet. Performs no action to the selected appointment.

Calculations
None.

Background Processes
For the Re-Schedule and Cancel/Delete buttons the system will remove the family appointments from the AAS_APPOINTMENTS table when the user commits the changes to the database by clicking the Save Icon from the toolbar. For the Re-Schedule button, the system will retain the family appointment information until the user clicks in a new appointment slot and “pastes” the family appointment.

Field to Column Mapping:
N/A
Appointment Scheduler

Section 1 - 5.1.4  : Class Assignments

Priority: Required

Window: Class Assignments

Report: No

Narrative:

This window allows users to view the class limit and count for a specific class and add Families to a Group Education Class. A user may only schedule a number of Participants for the class equal to or less than the Class Limit value, unless the user modifies the Class Limit value field in the Class Attendance screen.

The user will click to the Class Assignments tab after having already found the Family ID from the Client/Family Lookup. When the user enters the Class Assignments tab, the system will display all the open classes for the family’s clinic. The user will click the include button to schedule the family for that class.

The user can enter a date in this Search From Date field and the classes displayed will only show for those dates equal to or after the date entered. Optionally, the user can double click in the field and invoke a calendar popup. This popup will allow the user to click a date on the calendar and then the system will populate this field with the selected date. Additionally, the user can select a Class Category from the list of values to refine the list of classes that appears in the Classes Available section. After the user has entered a desired From Date and Class Category search criteria, s/he will click on the Go button to refine the list of Available Classes.

Business Rules

- Classes that have met their Class Limit size won’t appear in the Class Assignments screen. If the Class Limit is no longer at maximum capacity, the class will appear again in the Class Assignments screen.
- A user cannot schedule a client to a class when logged into the system at the Local Agency level. The user must enter in a specific clinic.
- When a user enters the Class Assignments tab, the system will display all the open classes for the family’s clinic upon completion of a search.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
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</tr>
</thead>
<tbody>
<tr>
<td>APPT_SCHEDULER</td>
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</tr>
<tr>
<td>Role</td>
<td>Status</td>
</tr>
<tr>
<td>----------------------</td>
<td>--------</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>N</td>
</tr>
<tr>
<td>BF_COUNSELOR</td>
<td>N</td>
</tr>
<tr>
<td>CNW</td>
<td>N</td>
</tr>
<tr>
<td>FI_ISSUER</td>
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</tr>
<tr>
<td>SA_OPERATIONS</td>
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</tr>
<tr>
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</tr>
<tr>
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<td>N</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>N</td>
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<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>VIEWER</td>
<td>N</td>
</tr>
<tr>
<td>NUTRITIONIST_1</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 5.1.4.1 : Class Assignments

Fields

**Search From (Date)** – The user can enter a date in this field to refine the list of classes that appears in the Classes Available section so the classes displayed will only show for those dates equal to or after the date entered. Optionally, the user can double click in the field and invoke a calendar popup. This popup will allow the user to click a date on the calendar and then the system will populate this field with the selected date. This field is optional.

**Class Category** – The user can select a Class Category from the list of values to refine the list of classes that appears in the Classes Available section. This field is optional.

**Go** – The user presses this button after entering in the search criteria in the Search From and Class Category fields. The system will search for the classes fitting the search criteria and display them in the Available classes section below.

**Classes Available**

**Date** – The system displays the date for the class the user can select to schedule the family into. This field is display only.

**Day of Week** – The system displays the day of the week for the class the user can select to schedule the family into. This field is display only.

**Time** – The system displays the start time for the class the user can select to schedule the family into. This field is display only.

**Class** – The system displays the name for the class the user can select to schedule the family into. This field is display only.

**Language** – The system displays the language for the class the user can select to schedule the family into. This field is display only.
Count/Limit – The system displays the count and limit of families scheduled for the class the user can select to schedule the family into. The count incrementally increases as a family is scheduled and saved to the class. This field is display only.

Clinic – The displays the clinic at which the class will be held. The system will only display the classes for the clinic the family is assigned to. This field is display only.

Classes Scheduled for Family

Date – The system displays the dates of the class(es) the family is scheduled to attend. This field is display only.

Day of Week – The system displays the day of the week of the class(es) the family is scheduled to attend. This field is display only.

Time – The system displays the start time of the class(es) the family is scheduled to attend. This field is display only.

Class – The system displays the name of the class(es) the family is scheduled to attend. This field is display only.

Language – The system displays the language of the class(es) the family is scheduled to attend. This field is display only.

Count/Limit – The system displays the count and limit of families scheduled for the class the user can select to schedule the family into. The count incrementally increases as a family is scheduled and saved to the class. This field is display only.

Clinic – The system displays the dates of the class(es) the family is scheduled to attend. This field is display only.

Calculations:

The Count field for the class is calculated by the system based upon the total number of unique Family Ids associated with each Class. For each A_APPOINTMENT_ID the system counts the unique CC_CLIENT_ID’s if the CS_CLINIC_SERVICES_ID is GroupEd.

Background Processes:

Upon entry into the Class Assignments Tab, the system performs a query of all the records in the AAS_CLASS_APPTS table for the clinic the user logged into. All those results are displayed in the top half of the screen for the user to schedule the Family into.

Field to Column Mapping:

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<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
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</thead>
<tbody>
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<td>Date</td>
<td>AAS_CLASS_APPTS</td>
<td>START_TIME</td>
</tr>
<tr>
<td>Day of Week</td>
<td>AAS_CLASS_APPTS</td>
<td>Calculated</td>
</tr>
<tr>
<td>Time</td>
<td>AAS_CLASS_APPTS</td>
<td>START_TIME</td>
</tr>
<tr>
<td>Class</td>
<td>AAS_CLASS_APPTS</td>
<td>CD_CLASS_DAYS_ID</td>
</tr>
<tr>
<td>Language</td>
<td>O_STAFF_MEMBERS</td>
<td>LANG_LANGUAGE_CODE</td>
</tr>
<tr>
<td>Count/Limit</td>
<td>Calculated</td>
<td>/ Calculated / CLASS_LIMIT</td>
</tr>
<tr>
<td>Clinic</td>
<td>AAS_CLASS_APPTS</td>
<td>OU_SEQ_ID</td>
</tr>
<tr>
<td>Date</td>
<td>AAS_CLASS_APPTS</td>
<td>START_TIME</td>
</tr>
<tr>
<td>Day of Week</td>
<td>AAS_CLASS_APPTS</td>
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<tr>
<td>Time</td>
<td>AAS_CLASS_APPTS</td>
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<td>Class</td>
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<td>CD_CLASS_DAYS_ID</td>
</tr>
<tr>
<td>Language</td>
<td>O_STAFF_MEMBERS</td>
<td>LANG_LANGUAGE_CODE</td>
</tr>
<tr>
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<td>----------------</td>
<td>--------------------</td>
</tr>
<tr>
<td>Count/Limit</td>
<td>Calculated / AAS_CLASS_APPTS</td>
<td>/ Calculated / CLASS_LIMIT</td>
</tr>
<tr>
<td>Clinic</td>
<td>AAS_CLASS_APPTS</td>
<td>OU_SEQ_ID</td>
</tr>
</tbody>
</table>
Appointment Scheduler

**Section 1 - 5.1.5 : Class Attendance**

**Priority:** Required

**Window:** Class Attendance

**Report:** No

**Narrative:**

This window allows users to: view/modify the class limit for a specific class, enter families into a class, update a Family’s class attendance, Update the Families that received food instruments at the class, select which Families for whom not to print food instruments, print food instruments for class members, and perform a search for a Family’s ID by double clicking in the Family ID field.

Also, the user will be able to preview and print Food Instruments for each member of each Family in the class. The user will be able to preview different family member’s food instruments by clicking on that family member’s name.

The user will be able to click the All Attended button which will update all the families attendance from Pending to Kept for the class. The user can then individually modify any one of the family’s status from Kept to Missed.

The list below details the complete set of user messages that can be invoked when the user clicks the Print Fis push button from the Class Attendance screen when attempting to produce food instruments. The items indicating **Remove** will be eliminated from the system and those marked as **Keep** will remain in use.

<table>
<thead>
<tr>
<th>Keep / Remove</th>
<th>Pop-up Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove</td>
<td>Client is not active and cannot receive food instruments.</td>
</tr>
<tr>
<td>Keep</td>
<td>Client is wait-listed, inserts/uploads not allowed.</td>
</tr>
<tr>
<td>Remove</td>
<td>This Client is Inactive. Food Instruments cannot be issued.</td>
</tr>
<tr>
<td>Remove</td>
<td>Client is a CSF client. Food instruments cannot be issued for CSF clients.</td>
</tr>
<tr>
<td>Keep</td>
<td>This Participant is not eligible to receive fi’s until an income record is entered and documented.</td>
</tr>
<tr>
<td>Keep</td>
<td>Client already has food instruments for the month of ...</td>
</tr>
<tr>
<td>Keep</td>
<td>This Client cannot be issued food instruments for (month). The food pattern effective date is cc.cfpp_effective_date.</td>
</tr>
<tr>
<td>Keep</td>
<td>This participant’s food package requires approval. Until approved, client is not eligible to receive FI’s.</td>
</tr>
<tr>
<td>Keep</td>
<td>The prescribed food package requires approval. When producing FI’s for this participant, the system will override the Pickup Interval and produce a single month’s FI’s.</td>
</tr>
<tr>
<td>Keep</td>
<td>The Food Instruments for this Client are already printed from Batch food instruments for the month of ...</td>
</tr>
<tr>
<td>Remove</td>
<td>Please update the Participant’s certification record with the appropriate category.’</td>
</tr>
<tr>
<td>Keep</td>
<td>The Last Date To Use For ... client id ... Will Be Earlier Than Today’s Date. Check The Pickup Day.</td>
</tr>
<tr>
<td>Keep</td>
<td>Client Requires Height And Weight Because of Anthropometric Risk Factors Between 12 and 23 Weeks Of Certification.</td>
</tr>
<tr>
<td>Keep</td>
<td>Client Requires Height And Weight Be Recorded Between 20 and 32 Weeks Of Certification.</td>
</tr>
</tbody>
</table>
Keep Client In A Pregnant Certification Requires Height And Weight Be Recorded At Every Visit.

**Business Rule**
- A user may only schedule a number of Clients for the class equal to or less than the Group Limit value, unless the user modifies the Group limit value field.
- The user will only be able to select classes from the clinic s/he is logged into. The users will not be able to perform modifications to Class Attendance when logged into the Local Agency.
- If the user manually indicates a Family has missed a class, the system will automatically check the Do Not Print check box so the Family is not issued Food Instruments. The user will have to manually deselect the Do Not Print if desired.

**Data Current As Of:** Run Time

**Frequency:** On Demand

**Role(s):**

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>APPT_SCHEDULER</td>
<td>N</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>N</td>
</tr>
<tr>
<td>BF_COUNSELOR</td>
<td>N</td>
</tr>
<tr>
<td>CNW</td>
<td>N</td>
</tr>
<tr>
<td>FI_ISSUER</td>
<td>N</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>N</td>
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<tr>
<td>SA_VIEWER_1</td>
<td>N</td>
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<td>SA_VIEWER_2</td>
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<td>SYSADM</td>
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<tr>
<td>VIEWER</td>
<td>N</td>
</tr>
<tr>
<td>NUTRITIONIST_1</td>
<td>N</td>
</tr>
</tbody>
</table>
**Section 1 - 5.1.5.1 : Class Attendance**

**Fields**

**Class:** Clicking on the list of values button allows the user to select Class to query on. When creating a Class from the Setup - Classes tab, the user enters a descriptive name of the group education Class to be used for querying in the future. This field is mandatory. The second field is the Group identification number. This Group identification field is system generated and is display only. Group ID numbers can be distinguished because they begin with a G.

**Class Count** - The number of Families currently scheduled for this class. This field is calculated by the system counting the number of Family IDs in this Group class. If two clients from the same family are assigned to a Group, the Group count only counts them as one unit. This field is display only.

**Class Limit** - The maximum number of unique Families allowed to be scheduled for this Class. This field is optional and can be overridden.

**Comment** - The user may provide any comments or notes concerning this Group appointment. This field is optional.

**Appt Type** - The class service provided at the appointment is displayed here. This field is display only.

**Appt. Date** - The date scheduled for the appointment is displayed here. This field is display only.

**Appt. Time** - The time for the scheduled appointment is displayed here. This field is display only.

**Staff** - The ID number of the Staff Member to which this Class is assigned. This field is display only.

**Family ID** - The Family ID of the Authorized Rep 1 scheduled for this Class. The user will be able to double click on the Family ID field, go to Client Family/Lookup, search for the family and return the id to this field, thereby scheduling the family to the class. This field is mandatory.
**Last Name, First Name, MI1, MI2** - All default from the Family ID selected. These fields are display only.

**Attendance** - The attendance status of the Family. It can be entered manually or selected from the list of values. For more information, please refer to the Attendance Statuses window. The field will default to PENDING/FUTURE when a Family is added to a Group class and can be overridden. This field is mandatory.

**Last Name, First Name, MI1, MI2** – All default for each client for the Family ID selected. These fields are display only.

**Cat** – Displays the Client’s category for the client row the cursor is focused on. This field is display only.

**Push Button(s)**

**All Attended:** The user will be able to click this button which will update all the families attendance from Pending to Kept for the class. The user can then individually modify any one of the family’s status from Kept to Missed.

**Print FIs** - Allows the user to navigate to generate Food Instruments for all the Clients in a group education Class at one time.

**Preview** – Allows the user to preview the Food Instruments before printing them.

**Calculations:**

**Class Count** - This field provides a running count of enrollees for the listed Class. This is calculated based upon the number of unique Family IDs in the Class. If two Participants from the same family are assigned to a Class, the Class Count only counts them as one unit.

**Background Processes:**

None

**Field to Column Mapping:**

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family ID</td>
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<td>AAS_CLASS_APPTS</td>
<td>CD_CLASS_DAYS_ID</td>
</tr>
<tr>
<td>Comment</td>
<td>AAS_CLASS_APPTS</td>
<td>NOTES</td>
</tr>
<tr>
<td>Appt Type</td>
<td>AAS_APPOINTMENTS</td>
<td>CS_CLINICSERVICE_ID (Always Group Ed)</td>
</tr>
<tr>
<td>Appt Date</td>
<td>AAS_APPOINTMENTS</td>
<td>START_TIME</td>
</tr>
<tr>
<td>Appt Time</td>
<td>AAS_APPOINTMENTS</td>
<td>START_TIME</td>
</tr>
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<tr>
<td>------------------------------</td>
<td>--------------------------</td>
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</tr>
<tr>
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<td>Calculated</td>
</tr>
<tr>
<td>FI Rec’d</td>
<td>AAS_APPT_CLIENTS</td>
<td>FI_RECEIVED</td>
</tr>
<tr>
<td>Last Name</td>
<td>C_CLIENTS</td>
<td>LAST_NAME</td>
</tr>
<tr>
<td>First Name</td>
<td>C_CLIENTS</td>
<td>FIRST_NAME</td>
</tr>
<tr>
<td>MI1</td>
<td>C_CLIENTS</td>
<td>MI1</td>
</tr>
<tr>
<td>MI2</td>
<td>C_CLIENTS</td>
<td>MI2</td>
</tr>
<tr>
<td>Cat</td>
<td>C_CERTIFICATIONS</td>
<td>CAT_CATEGORY_CODE</td>
</tr>
</tbody>
</table>
## Section 1 - 5.1.5.2 : Class FI Non-Prints log

### Report Date: MM/DD/YYYY

**Arizona WIC Program**  
Class FI Non-Prints Log

<table>
<thead>
<tr>
<th>Client ID</th>
<th>Food Instrument #</th>
<th>Error Message</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXXXX</td>
<td>XXXX-XXXXX</td>
<td>XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX</td>
</tr>
<tr>
<td>XXXXXXXXXX</td>
<td>XXXX-XXXXX</td>
<td>XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX</td>
</tr>
<tr>
<td>XXXXXXXXXX</td>
<td>XXXX-XXXXX</td>
<td>XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX</td>
</tr>
<tr>
<td>XXXXXXXXXX</td>
<td>XXXX-XXXXX</td>
<td>XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX</td>
</tr>
<tr>
<td>XXXXXXXXXX</td>
<td>XXXX-XXXXX</td>
<td>XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX</td>
</tr>
<tr>
<td>XXXXXXXXXX</td>
<td>XXXX-XXXXX</td>
<td>XXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXXX</td>
</tr>
</tbody>
</table>

**Figure 47 – Class / Group FI Non Prints log**

Sort Criteria (Major to Minor):

- **Client ID (Ascending)**
- **Food Instrument # (Ascending)**

**Calculations:**

None

**Background Processes:**

The system generates the log above based upon the Food Instruments printed for the Class Attendees documented in the Class Attendance Screen. This report generates automatically to the user’s default printer when the user clicks the Print Fis button.
Enrollment and Certification

Section 1 - 5.2 : Update Precertification Information

Priority: Required
Window: Precertification
Report: No
Narrative:

The purpose of this Window is to allow the user to enter precertification data about Participants. This Window is available by clicking on the Precertification menu option on the Cert Action submenu of the Certification Info menu. Besides name, address, and phone information, the screen gives the user access to calculating income eligibility, enter category and generate expected priority. The category is automatically generated for C1 thru C4 clients (based upon date of birth) and manually chosen for women and infants, depending on status. The screen also contains wait-listing functionality to add a Participant to the wait list.

This window is being included in the Appointment Scheduler design because three radio button categories have been added to the screen to facilitate Appointment Scheduling functionality. The Pregnant Client radio button has been added to allow users to indicate whether the client being precertified is pregnant. If the client is pregnant, the address fields will be mandatory, if the not, they will remain optional. Additionally, the Walk - In and Phone radio buttons have been added allow the user to indicate whether the client being precertified is being seen in person or is on the phone with the user. This will be used later in the Pre-certified New Enrollments report. The Migrant radio buttons have been added to indicate whether the participant(s) are of migrant status. The information will be used for the Pre-certified New Enrollments report.

Sort Criteria: None

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>CNW</td>
<td>N</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>NUTRITIONIST_1</td>
<td>N</td>
</tr>
<tr>
<td>APPT_SCHEDULER</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 5.2.1: Precertification

Figure 48 - Precertification

Fields

**Family ID** - A unique, system generated identifier for the family economic unit. This field is mandatory. Double clicking on the Family ID field activates the Participant/Family Search Window.

**Clinic** - The organization unit that serves as the local clinic for the applicant. This field is mandatory and can be selected from a list of values. For more information, please refer to the Organizational Units table in Operations Management. The description of the Clinic will be shown, once the Clinic is filled in.

**Is Client Pregnant**

**Yes** – The user clicks on this radio button to indicate that the client being precertified is pregnant. Doing so will cause the Address fields to be mandatory. This field will not be checked if the following No field is checked. Either the Yes or the No field must be selected.

**No** – The user clicks on this radio button to indicate that the client being precertified is not pregnant. Doing so will cause the Address and Family size fields to remain optional. This field will not be checked if the preceding Yes button is checked. Either the Yes or the No field must be selected.

**Walk-In** – The user clicks on this radio button to indicate that the client being precertified is present in front of the user at the time of the precertification and not on the phone. This will be used later for reporting in the Pre-certified New Enrollments report. The user must click either this radio button or the Phone radio button.

**Phone** - The user clicks on this radio button to indicate that the client being precertified on the phone with the user at the time of the precertification and not present in the clinic. This will be
used later for reporting in the Pre-certified New Enrollments report. The user must click either this radio button or the Walk-In radio button.

**Migrant** – The user clicks on this radio button to indicate whether the client being pre-certified is of migrant status. The information will be used for the Pre-certified New Enrollments report.

**Authorized Rep 1 Last Name** - The last name of the authorized representative of the applicant. This field is mandatory.

**Authorized Rep 1 First Name** - The first name of the authorized representative of the applicant. This field is mandatory.

**MI 1** - The first middle initial of the authorized representative of the applicant. This field is optional.

**MI 2** - The second middle initial of the authorized representative of the applicant. This field is optional.

**Mailing Address** - The first and second address lines of the authorized representative’s mailing address. The first address line is mandatory; the second is optional for only pregnant categories.

**Street Address** - The first and second address lines of the authorized representative’s street address. The first address line is mandatory; the second is optional for only pregnant categories.

Street Address is defaulted from Mailing Address.

**City** - The city corresponding to the mailing address. This is filled in if the zip is selected, or may be selected from the list of values. This field is mandatory for only pregnant categories.

City - The city corresponding to the street address. This is filled in if the zip is selected or may be selected from the list of values. This field is mandatory for only pregnant categories.

**County** - The county corresponding to the mailing address. This field is automatically filled in based on the city or zip.

**State** - The state corresponding to the mailing address. This field is automatically filled in when the city or zip is selected.

**Zip** - The nine-digit zip code of the mailing address. This field defaults to the zip code of the clinic entered above. The five-digit zip is mandatory and may be selected from the list of values. The four-digit extension code is optional.

County - The county corresponding to the street address. This field is automatically filled in based on the city or zip.

State - The state corresponding to the street address. This field is automatically filled in when the city or zip is selected.

Zip - The nine-digit zip code of the street address. The five-digit zip is mandatory and may be selected from the list of values. The four-digit extension code is optional.

**Fields (Eligibility section)**

**Family Size** - The number of individuals in the applicant family economic unit. This field is optional. **Income** - The income of the applicant. This field is automatically filled in once the applicant income information has been entered. This field is optional. For more information, refer to the description of the Income Family/Individual push button.

**Fields (Applicant section)**

**Applicant ID** - The ID number of the applicant. This field is mandatory and system generated.

**Applicant Last Name** - The last name of the applicant. This field defaults to the Authorized Rep 1 last name. This field is mandatory.

**Applicant First Name** - The first name of the applicant. This field is mandatory.

**MI 1** - The first middle initial of the applicant’s name. This field is optional.
MI 2 - The second middle initial of the applicant's name. This field is optional.

Birth Date - The birth date of the applicant. This field is mandatory.

Cat. - The category into which the applicant falls. The list of categories displayed is reduced depending on the age of the participant. For those participants under the age of one only infant categories are displayed, for those between 1 and 5 only children categories are displayed, for those between 5 and 6 the field defaults to C5 (CSFP), for those between 6 and 60 only women categories are displayed, and for those over 60 only Elderly (CSFP) categories are displayed. This field is mandatory and can be selected from a list of values. For more information, please refer to the Category table.

Exp. Pri. - The expected priority of the applicant. For infants, breastfeeding and pregnant Participants this field defaults to one, for children and postpartum defaults to three. This field is mandatory.

WL - A check box that indicates the Participant is to be put on the wait list. This field defaults to checked if the expected priority and category are not currently being served. The user is allowed to override this.

Fost. Child - A check box that indicates the Participant is in foster care. If this check box is selected the system displays “Has the participant entered foster care within the last 6 months or changed foster homes within the last 6 months?” If the user responds Yes then risk factor 903 is assigned for WIC participants when creating a Certification period in the Certification Action Window.

Inc. Elig. - A check box that indicates the Participant is eligible based on income. This is a display only field.

Adj. Elig. - A check box that indicates the Participant is adjunctively eligible. This is a display only field.

Push Button(s)

Income Family/Individual - These buttons invoke the Income Calculator function and allow the user to enter income eligibility information. The label on this button changes depending on the location of the cursor. If the cursor is on an applicant record in the Applicant block the label is "Income Individual" and the user is allowed to enter income for the individual that the cursor is currently on. This is useful in the case of foster children. If the cursor is not on an applicant record then the button label is "Income Family" and the user can enter income information for the entire family.

Adjunct Eligibility - This button is chosen if the Participant is eligible for WIC because of eligibility in other programs (AFDC, Food Stamps, etc.). This button is only available at the applicant level, if the cursor is on an applicant record in the Applicant block this button is enabled.

Phone/Confidentiality - Clicking on this button allows the user to enter data pertaining to the applicant’s telephone number and confidentiality.

Appt Scheduler – Clicking on this button allows the user to “jump” to the Appointment Scheduler module and schedule this precertified family to an appointment slot. The Family Id will carry over to the top block on the Appointment Sheet.

Calculation(s)

None.

Background Process(es)
During the End of Day process the system purges precertified participants with no further record activity after 60 days. If a participant is wait listed on this screen the record is not purged by the End of Day process after 60 days. When the data on this window is saved and one or more of the Participants have been selected to be placed on the wait list the user is prompted to print the Wait List Notification.

During the End of Day process, in the EA1_OTHER_PURG.SQL script, the system purges precertified participants with no C_CERTIFICATIONS records and NVL(C_CLIENTS.DATE_CREATED, C_CLIENTS.DATE_MODIFIED) > 60 days in the past and if C_CLIENTS.WAIT_LIST_FLAG is 'N'.

At save time if C_CLIENTS.WAIT_LIST_FLAG is checked for one or more of the Participants the user is prompted with Yes / No options: "Print the Wait List Notification?". If Yes is selected the cs_wait_notify_cri form is invoked and the parameter screen is auto populated with the participant's information, the user can then print the Wait List Notification.

Field to Column Mapping:

<table>
<thead>
<tr>
<th>Screen Field</th>
<th>Database Table</th>
<th>Table Column</th>
</tr>
</thead>
<tbody>
<tr>
<td>Family ID</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>FAMILY_ID</td>
</tr>
<tr>
<td>Clinic</td>
<td>AAS_CLASS_DAYS</td>
<td>CLASS_NAME</td>
</tr>
<tr>
<td>Pregnant Client</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>PREG_CLIENT_CK</td>
</tr>
<tr>
<td>Walk-In</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>WALK_IN_CK</td>
</tr>
<tr>
<td>Phone</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>PHONE_CK</td>
</tr>
<tr>
<td>Authorized Rep 1 Last Name</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>AUTHORIZED_REP1_LAST_NAME</td>
</tr>
<tr>
<td>Authorized Rep 1 First Name</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>AUTHORIZED_REP1_FIRST_NAME</td>
</tr>
<tr>
<td>MI1</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>AUTHORIZED_REP1_MI1</td>
</tr>
<tr>
<td>MI2</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>AUTHORIZED_REP1_MI2</td>
</tr>
<tr>
<td>Mailing Address</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>MAILING_ADDRESS</td>
</tr>
<tr>
<td>Street Address</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>STREET_ADDRESS1</td>
</tr>
<tr>
<td>City(Mailing)</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>SGEO_GEO_LOCATION_ID_MAIL</td>
</tr>
<tr>
<td>City(Street)</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>SGEO_GEO_LOCATION_ID_STREET</td>
</tr>
<tr>
<td>County(Mailing)</td>
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<td>SC4_COUNTY_CODE</td>
</tr>
<tr>
<td>State(Mailing)</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>SS_STATE_ID</td>
</tr>
<tr>
<td>Zip(Mailing)</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>SGEO_GEO_LOCATION_ID_MAIL</td>
</tr>
<tr>
<td>Zip+4(Mailing)</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>MAILING_ZIP4</td>
</tr>
<tr>
<td>County(Street)</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>SC4_COUNTY_CODE</td>
</tr>
<tr>
<td>State(Street)</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>SS_STATE_ID</td>
</tr>
<tr>
<td>Zip(Street)</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>SGEO_GEO_LOCATION_ID_STREET</td>
</tr>
<tr>
<td>Zip+4(Street)</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>STREET_ZIP4</td>
</tr>
<tr>
<td>Family Size</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>FAMILY_SIZE</td>
</tr>
<tr>
<td>Income</td>
<td>C_FAMILY_ECONOMIC_UNITS</td>
<td>INCOME</td>
</tr>
<tr>
<td>Applicant ID</td>
<td>C_CLIENTS</td>
<td>CLIENT_ID</td>
</tr>
<tr>
<td>Applicant Last Name</td>
<td>C_CLIENTS</td>
<td>LAST_NAME</td>
</tr>
<tr>
<td>Applicant First Name</td>
<td>C_CLIENTS</td>
<td>FIRST_NAME</td>
</tr>
<tr>
<td>MI1</td>
<td>C_CLIENTS</td>
<td>MI1</td>
</tr>
<tr>
<td>MI2</td>
<td>C_CLIENTS</td>
<td>MI2</td>
</tr>
<tr>
<td>Birth Date</td>
<td>C_CLIENTS</td>
<td>BIRTH_DATE</td>
</tr>
</tbody>
</table>

CMA Consulting Services 135 August 2010
<table>
<thead>
<tr>
<th>Cat.</th>
<th>C_CLIENTS</th>
<th>CAT_CATEGORY_CODE</th>
</tr>
</thead>
<tbody>
<tr>
<td>Exp. Pri.</td>
<td>C_CLIENTS</td>
<td>CP2_ID</td>
</tr>
<tr>
<td>WL</td>
<td>C_CLIENTS</td>
<td>WAIT_LIST_FLAG</td>
</tr>
<tr>
<td>Fost. Child</td>
<td>C_CLIENTS</td>
<td>FOSTER_CARE_FLAG</td>
</tr>
<tr>
<td>Inc. Elig.</td>
<td>C_CLIENTS</td>
<td>INCOME_ELIGIBLE_FLAG</td>
</tr>
<tr>
<td>Adj. Elig.</td>
<td>C_CLIENTS</td>
<td>ADJ_ELIGIBLE_FLAG</td>
</tr>
</tbody>
</table>
Enrollment and Certification

Section 1 - 5.3 : Update Care Plan – Follow Up / Nutr Ed section

Priority: Required

Window: Care Plan

Report: No

Narrative:

The purpose of this Window is to allow the user to: view future appointments (both individual and class appointments the family members attended), update appointments up to 1 week in the past for a client, see the category and name of the education class that a client’s group appointment is assigned to, optionally add materials for an appointment or group education class, update the service for a client’s appointment and update the Care Plan Notes for the client.

*Note – The screen is designed so that the nutrition education topics shown at the bottom of the screen can be associated to the individual or group education class or appointment the user has clicked the mouse focus on in the appointment rows. Individual appointments will have no values in the Class Cat., Class Name and Topics fields. The Topic information is available in the list of values field from the C_NUTRITION_ED_TOPIC table.

The user may modify either the pickup day or interval for an individual client in this screen to change the a client from monthly to bi-monthly or tri-monthly issuance. Modification of either the day or interval for a single family member will change it for every member within the family. If a staff changes a family that has a client who needs monthly pickup to interval 2 or 3, then this will be addressed as a training issue by LA’s. Staff are expected to note if any clients within a family require monthly pickup and assign that family a monthly interval.

Business Rules

- The AIM system will update the C_CLIENT_SERVICES table with the user id of the user performing the updates to the nutrition education information for the appointment.
- Nutrition Education that is entered for one family member on an appointment date will update for all family members with the same appointment date in the C_CLIENT_SERVICES table.
- The assignment of materials to an appointment will be optional and client specific.
- When a user prints Food Instruments from the Appointment Scheduler module for a Group Class, the system will update the Follow Up / Nutr. Ed. popup with that appointment’s row.

Data Current As Of: Run Time
**Frequency:** On Demand

**Role(s):**

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>CNW</td>
<td>N</td>
</tr>
<tr>
<td>SA оперATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ DEVELOPER</td>
<td>N</td>
</tr>
<tr>
<td>SA NUTRITIONIST</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>NUTRITIONIST_1</td>
<td>N</td>
</tr>
<tr>
<td>BF COUNSELOR</td>
<td>Y</td>
</tr>
</tbody>
</table>
Section 1 - 5.3.1: Care Plan - Follow Up/Nutr Ed

Figure 49 - Care Plan - Follow Up/Nutr Ed

Fields (Follow-Up Services section)

**Pickup Day** - The schedule day description is selected from the list of values. For more information, see the Pickup Days table. The Pickup Day applies to the entire family. This field is mandatory.

**Pickup Interval** - The interval of food instrument pickups by the Participant are selected here from the list of values. For more information, see the Pickup Intervals table. This field is used to coordinate nutrition education with food instrument pickups. This field is mandatory.

Fields (Family Members section)

**Client Id** - The unique identification number of the Participant’s family member. This field is display only.

**Last Name** - The last name of the Participant’s family member. This field is display only.

**First Name** - The first name of the Participant’s family member. This field is display only.

**MI 1** - The first middle initial of the Participant’s family member. This field is display only.

**MI 2** - The second middle initial of the Participant’s family member. This field is display only.

**Cert End Date** - The end date of the Participant family member’s current certification period. This field is display only.

**Date** – This field shows the date of either today’s appointment or one in the past depending on which row has the cursor focus. The cursor will default to focus on the top row, which contains today’s appointment record. This field is display only.

**Service** - The service being provided or previously provided to the client at this appointment. This field is display only.

**Attendance** - The attendance status for the appointment. This field is display only.
**Class Cat.** – Appointments with a Service type of Group will have the Class Category and the Class Name of the Group Education class displayed. This field is display only.

**Class Name** – Appointments with a Service type of Group will have the Class Category and the Class Name of the Group Education class displayed. This field is display only.

**Nutrition Education Date** – The date the nutrition education was provided. Defaults to the current date but is modifiable with a past date only. This field is mandatory.

**Nutrition Education Topic** - The nutrition education topic(s) that was discussed/addressed at the appointment. This field can be selected from the list of values. For more information, refer to the Nutrition Education Topics table. This field is mandatory.

**Description** – The name of the nutrition education topic selected. This field is display only.

**Push Button(s)**

**Materials** - Clicking this button opens the materials pop-up window and allows the user to assign the materials used at the appointment to a particular Participant. Assigning materials to an appointment is optional.

**Appt. Sched** - Clicking this button brings the user to the associated appointment scheduler and allows the user to perform a find command that will default to the next appropriate appointment date based upon the pickup date and interval.

**OK** - Clicking this button saves the data in the push button window and returns to the Care Plan Window.

**Notes** – Clicking this button allows the user to enter comments about the Participant that would be beneficial to assist the Participant in fulfilling their goals. Notes are assigned to individual Participants.

**Calculations**

The suggested schedule dates are determined by the pickup day and the pickup interval.

**Background Processes**

Based on the participants risk factors, services are suggested as defined in the Services Protocol table. The user can select from suggested nutrition education topics to administer to the participant. The suggested nutrition education topics are based on the participant's category and risk factors, and are defined in the category and risk factor protocols tables. The nutrition education topics assigned to the first member of a family is reflected in all members of the family.
Food Instruments

Section 1 - 5.4 : Producing On Demand Food Instruments

Priority: Required

Window: On Demand Food Instruments

Report: No

Narrative:

This Window is used to produce the food instruments for a participant or all of the participants in a family/economic unit. The warning notes feature is available to review any additional information about the participant. The user can select to print FI's for either the individual participant or all participants in a family. The issue month can be selected from a pick list, but the first month of issue can only be one month in the future. The window displays a participant in the family if the Family Issuance radio button is selected. Information about the participant's status and pick up interval are displayed. Pressing the preview button allows the user to view the actual FI's before printing them. Pressing the Appointments push button will “jump” the user to the Appointment Sheet for the current day for the clinic in which they are logged into. Pressing the Classes button will “jump” the user to the Class Assignments Screen so the user can then schedule the family for a Nutrition Education class.

The list below details the complete set of user messages that can be invoked when the user attempts to produce food instruments. The items indicating Remove will be eliminated from the system and those marked as Keep will remain in use.

<table>
<thead>
<tr>
<th>Pop-up Message</th>
<th>Keep / Remove</th>
</tr>
</thead>
<tbody>
<tr>
<td>Remove Client is not active and cannot receive food instruments.</td>
<td></td>
</tr>
<tr>
<td>Keep Client is wait-listed. inserts/updates not allowed.</td>
<td></td>
</tr>
<tr>
<td>Remove This Client is Inactive. Food Instruments cannot be issued.</td>
<td></td>
</tr>
<tr>
<td>Remove This Client is a CSF client. Food instruments cannot be issued for CSF clients.</td>
<td></td>
</tr>
<tr>
<td>Keep This Participant is not eligible to receive fi’s until an income record is entered and documented.</td>
<td></td>
</tr>
<tr>
<td>Keep Client already has food instruments for the month of ...</td>
<td></td>
</tr>
<tr>
<td>Keep This Client cannot be issued food instruments for (month). The food pattern effective date is cc.cfpp_effective_date.</td>
<td></td>
</tr>
<tr>
<td>Keep This participant’s food package requires approval. Until approved, client is not eligible to receive FI’s.</td>
<td></td>
</tr>
<tr>
<td>Keep The prescribed food package requires approval. When producing FI’s for this participant, the system will override the Pickup Interval and produce a single month’s FI’s.</td>
<td></td>
</tr>
<tr>
<td>Keep The Food Instruments for this Client are already printed from Batch food instruments for the month of ...</td>
<td></td>
</tr>
<tr>
<td>Remove Please update the Participant’s certification record with the appropriate category.</td>
<td></td>
</tr>
<tr>
<td>Keep The Last Date To Use For ... client id ... Will Be Earlier Than Today’s Date. Check The Pickup Day.</td>
<td></td>
</tr>
<tr>
<td>Keep Client Requires Height And Weight Because of Anthropometric Risk Factors Between 12 and 23 Weeks Of Certification.</td>
<td></td>
</tr>
<tr>
<td>Keep Client Requires Height And Weight Be Recorded Between 20 and 32 Weeks Of Certification.</td>
<td></td>
</tr>
<tr>
<td>Keep Client In A Pregnant Certification Requires Height And Weight Be Recorded At Every Visit.</td>
<td></td>
</tr>
</tbody>
</table>
Sort Criteria (Major to Minor): Food  Instrument Serial Number (ASC)

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
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</tr>
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<tbody>
<tr>
<td>SA_FIP_1</td>
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<td>SA_VIEWER_1</td>
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<tr>
<td>AZ_DEVELOPER</td>
<td>N</td>
</tr>
<tr>
<td>SA_NUTRITIONIST</td>
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</tr>
<tr>
<td>SA_FORMULA_APPROVAL</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
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</tr>
<tr>
<td>FI_ISSUER</td>
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</tbody>
</table>
Section 1 - 5.4.1.1 : On Demand Food Instruments

Fields

Client ID - Double-clicking this brings up the Participant/Family Lookup window which allows the user to select a participant identification number. The user can also select participants from a list of values. This entry is mandatory if the Participant Issuance radio button is selected. The Participant Last Name, First Name and Middle Initials are also shown.

Family ID - Double-clicking this brings up the Participant/Family Lookup window which allows the user to select a family identification number. The user can also select a family from a list of values. This entry is mandatory if the Family Issuance radio button is selected. The First Authorized Representative's Last Name, First Name and Middle Initials are also shown.

Issue Month - The month the FI is issued. The month represents the month of issue, on the first month of bi-monthly or tri-monthly issuance. This field is mandatory and comes from a list of values. The user can only select the current month or one month in the future. NOTE: The user can select the prior month if the pickup day is the end of the prior month and the participant is late picking up.

Client ID - This field is a display only of the participant’s ID selected or all participants' ID's in the family/economic unit.

Last Name - The last name of the participant selected or all participants in the family/economic unit. This field is display only.

First Name - The first name of the participant selected or all participants in the family/economic unit. This field is display only.

MI 1 - The first middle initial of the participant selected or all participants in the family/economic unit. This field is display only.
**MI 2** - The second middle initial of the participant selected or all participants in the family/economic unit. This field is display only.

**Record Status** - This display only field tells whether the participant record is Active (A), Complete with no errors, Pending (P), Incomplete or containing errors, or inactive (I), terminated. Only participants with active status can receive FI's.

**Pick Up Intervals** - The Pick Up Interval of the participant. This field is mandatory and is filled from the participant. This field can be selected from the list of values. For more information see the Pick Up Intervals table in the certification module.

**Check Box(es)**

**Issue (Y/N)** - The system automatically checks this box if the participant is eligible to be issued food instruments. If a user checks it, a message is displayed detailing the reasons why issuance will not occur.

This field cannot be checked if the client's receiving status is not 'Active'. This field cannot be checked if the client's income is 'Forgot Documentation' and the Income Received flag is 'Y' and the client is not adjunctively eligible and has already received one month of food instruments. If the user attempts to check this check box the following message is displayed: “This participant is not eligible to receive FI’s until an income record is entered and documented”.

Also, this field cannot be checked if the client's food package prescription requires approval, the approved by flag is null and the approved thru date is prior to today's date. If the user attempts to check this check box, the following message is displayed: “This participant’s food package requires approval. Until approved, this participant is not eligible to receive FI’s.”

Also, this field cannot be checked if the client's last issued date is after today's date in the Issue Month selected. For example, if today's date were 9/15 and the Issue Month selected is October and the Last Issued date is 11/01, the comparison would be "is 11/01 after 10/15". If the user attempts to check this check box the following message is displayed: “This participant has already received food instruments for the issue month selected and is not eligible to receive FI's at this time.”

Also, this field cannot be checked if the client's category code is a Pregnant category and a Medical record does not exist with a Create date equal to today’s date. If the user attempts to check this check box the following message is displayed: “A Medical record must be collected before FI's can be produced for this participant.”

Also this field cannot be checked if the client's category code is an Infant category and today's date is between 20 and 32 weeks after the certification start date and an Infant Medical record does not exist where the create date is between 20 and 32 weeks after the certification start date. If the user attempts to check this check box the following message is displayed: “A Medical record must be collected before FI's can be produced for this participant.”
If the client’s category code is a Breastfeeding category and the user attempts to check this check box the system displays the following message with Yes No options "Are you still breastfeeding?" If the answer is Yes, then the check box is set to checked. If the answer is No, then the check box is set to unchecked and FI's cannot be produced for the participant.

**Late Pickup (Y/N)** - This check box indicates the participant is picking up their FI's beyond the 'Late Pickup' standards and the system will produce a reduced number of FI's. This field is display only.

**Radio Button(s)**
- **Client Issuance** - If this radio button is clicked when the Participant ID field is entered/selected, only that particular Participant identification and name will appear in the list below the Issue Month field.
- **Family Issuance** - If this radio button is clicked when the Participant ID field is entered/selected, all participants with the same family identification will appear in the list below the Issue Month field.

**Push Button(s)**
- **Notes** - This button brings up the warning notes window.
- **Breastfeeding Promo** - This button brings up the Breastfeeding Promotional Items window.
- **Preview** - This button allows the user to preview the food instruments before printing.
- **Print** - This button allows the user to print the food instrument on demand.
- **Appointments** - This button allows the user to open the Appointments window of the Appointment Scheduler
- **Appointments** - Pressing the Appointments push button will “jump” the user to the Appointment Sheet for the current day for the clinic in which they are logged into.
- **Classes** - Pressing the Classes button will “jump” the user to the Class Assignments Screen so the user can then schedule the family for a Nutrition Education class.

**Calculations**

None

**Background Processes**

For breastfeeding clients are asked, "Are you still breastfeeding?" If the answer is Yes, then FI's are Issued. If the answer is No, then no FI's are produced and the user should update the participant's category.

The expected inventory field in the stock usage window is decremented as FI’s are produced.

Both FI’s and stubs are taken into consideration when decrementing.

If the number of available serial numbers for the clinic are down to 5% of the static factors, 'small clinic FI's', 'med clinic FI's', 'large clinic FI's', then the following message is displayed prior to printing FI's "The available serial numbers are down to 5%, notify the system administrator to issue additional serial numbers to this clinic."

When printing serial numbers on the FI paper stock, the system does not print leading zeroes.
Enrollment and Certification

Section 1 - 5.5 : Update Food Package Prescription

Priority: Required

Window: Food Package Prescription

Report: No

Narrative:

The purpose of this Window is to allow the user to prescribe a food package to a WIC Participant. If the 'Customize Flag' static factor (found in the Finance module) is set to 'Yes', the user may build a customized food package to prescribe to the Participant. Automated food package changes are defined in this function by prescribing food packages with future effective dates. When food instruments are produced for the participant, the system automatically prints the FI using the food package that is prescribed for the particular month that the FI’s are produced. To determine the food package the food instrument’s ‘First Date to Use’ is compared to the effective dates in the list of prescriptions and the food package that is in effect on that date is printed for the given month.

The user can press the Appt Scheduler push button to jump to the Appointment Sheet for the current day and schedule the family/client for an appointment.

Sort Criteria (Major to Minor): None

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
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<td>AZ_DEVELOPER</td>
<td>N</td>
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<td>SA_FORMULA_APPROVAL</td>
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</tr>
<tr>
<td>NUTRITIONIST_1</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 5.5.1  : Food Packages

Figure 51 - Food Packages

Food Packages

Fields

Family ID - A unique, system generated identifier for the family economic unit. Double clicking this field activates the Participant/Family Search Window. This field can be queried to retrieve the family record. This field is display only and carried forward from the Family Information Window.

Authorized Rep1 Last Name - The last name of the primary authorized representative. This field is display only and carried forward from the Family Information Window.

Authorized Rep1 First Name - The first name of the primary authorized representative. This field is display only and carried forward from the Family Information Window.

MI1 - The first middle initial of the primary authorized representative. This field is display only and carried forward from the Family Information Window.

MI2 - The second middle initial of the primary authorized representative. This field is display only and carried forward from the Family Information Window.

Pickup Interval - The family pickup interval is displayed here and is populated from the Family ID field. This field is display only. Client Id - The unique identification number to identify a Participant. Double clicking this field activates the Participant/Family Search Window. This field can be queried to retrieve the Participant record. This field is display only.

Last Name - The last name of the Participant. This field is display only and will be filled from the Client Id field when the record is queried.
First Name - The first name of the Participant. This field is display only and will be filled from the Client Id field when the record is queried.
MI1 - The Participant’s first middle initial. This field is display only and will be filled from the Client Id field when the record is queried.
MI2 - The Participant’s second middle initial. This field is display only and will be filled from the Client Id field when the record is queried.
Category - The Participant's current category. This field is display only and will be filled from the Client Id field when the record is queried.
Pickup Day - The day of the month the Participant is scheduled to pickup FI's is selected from the drop-down list. For more information, refer to the Pickup Days table. This field is mandatory.
Pickup Interval - The interval between food instrument collections by the Participant are selected here from the drop-down list. For more information, refer to the Pickup Intervals table. This field is mandatory and defaults from the family Pickup Interval.
Certification - The certification start and end dates. These fields can be selected from the list of values and defaults to the latest certification period. For more information, refer to the Certification (Cert Action) Window. Selecting a certification period displays food package prescriptions in effect during that certification period. This allows the user to change a prescription during the last month of a current certification period in the case where a participant has already been certified for their next certification period to begin next month.
Food Package - Specifies the food package code that has been prescribed to the Participant for the time period entered in the effective and end date. This field is mandatory and is filled in by the user from either the custom food package pop up or the standard food package pop up.
Description - Description of the food package assigned to the Participant. This field is display only.
Effect. Date - The date when the food package becomes effective. This field is mandatory and defaults to the certification start date.
End Date - Last date for use of this food package. This field is mandatory and defaults to the certification end date.
Approved Thru - The date this food package is approved through and is used to limit the issuance of FI's for packages containing a formula that requires a physicians prescription. If the food package contains a food that requires approval then this field defaults to the lesser of the next scheduled appointment or 30 days. This field is display only.
Comment - The user may provide any comments or remarks. This field is optional.
Nutritionist - This field contains the name of the nutritionist that should perform the approval of the food package prescription. This field can be selected from the list of values. For more information, refer to the Staff Data table in Operations Management. This field is mandatory if the “Approved Thru“ field is filled in. After a prescription has been approved this field is display only.

Check boxes

Approval Nutr. - This check box indicates this food package has been approved by the nutritionist. This field is optional. This check box is enabled if the food package requires Nutritionist's approval, otherwise the field is disabled.
Approval Phys. - This check box indicates that documentation from a physician has been received. This field is optional. This check box is enabled if the food package requires Physician's approval, otherwise the field is disabled.
Disable - This check box indicates that the food package prescription has been disabled, and is not considered when validating the prescription dates. This field is optional.
**Push Button(s)**

**Symptoms** - This button presents the user with the Symptoms window and allows the user to enter foods and reactions the Participant has experienced in the past.

**[CO50] On Demand** - Automatically launches the On-Demand Food Instruments screen, passing the family information to eliminate having to re-query the information. [end CO50]

**Appt Scheduler** - The user can press the Appt Scheduler push button to jump to the Appointment Sheet for the current day and schedule the family/client for an appointment.

**History** - This button presents the user with the History window and allows the user to view food packages prescribed during past certification periods.

**Custom** - If Custom is chosen, then the food package matrix Window is presented from which the user is able to customize a food package specifically for the Participant.

**Standard** - If Standard is chosen, then the user is presented with a list of state-defined food packages from which to choose.

**Radio Button(s)**

**Family** - This radio button allows the user to switch quickly to the Family Information Window.

**Client Reg.** - This radio button allows the user to switch quickly to the Participant Registration Window.

**Cert Action** - This radio button allows the user to switch quickly to the Certification Action Window.

**Medical** - This radio button allows the user to switch quickly to the Medical Window.

**Health** - This radio button allows the user to switch quickly to the Health Window.

**Diet Assess** - This radio button allows the user to switch quickly to the Dietary Assessment Window.

**Care Plan** - This radio button allows the user to switch quickly to the Care Plan Window.

**Food Pkg** - This radio button allows the user to switch quickly to the Food Package Window.

**Calculation(s)**

None

**Background Process(es)**

The effective start and end dates of a participant’s food package prescriptions are validated using the following rules:

- Prescription dates cannot overlap another prescription’s dates (disabled prescriptions are not validated)
- One or more prescriptions must be prescribed to a participant for each certification period, and the prescription dates must span the entire certification period without any date gaps or overlaps. (disabled prescriptions are not validated)

The system performs the following checks before setting a participant to Active and allowing the issuance of food instruments:

- An income record within the income guidelines (currently 185% of the poverty level) or adjunctively eligible because of participation in another program.
- A valid certification period
- An anthropometric medical record within 90 days of the certification start date
- A bloodwork medical record within 90 days of the certification start date for all categories except infants (under 12 mo. of age)
- A health history record on or after the certification start date.
- One or more risk factors assigned
- A response in the voter registration field on the family information window.

To approve a food package, the nutritionist checks either (or both) the Approval Nutr. or Phys. check boxes. The system then calculates the Approved Thru field as defined in the field definition and overwrites the value of the Nutritionist field with the current user's user Id. The Nutritionist field, Approval Nutr. and Approval Phys. check boxes are then disabled and cannot be updated.

When the record is saved and the Pickup Interval for the participant is greater than 1 and the approval has not been performed, the system displays the following message to the user as a reminder that the pickup interval will be overridden and FI's will be produced for only the first month: "The prescribed food package requires approval, when producing FI's for this participant the system will override the Pickup Interval of # and produce a single month's FI's."

If the food package prescribed requires approval and the necessary approval check boxes are not checked the system does not allow the issuance of Food Instruments after the Approved Thru date has expired. This restriction is enforced in the On-Demand and the Batch FI windows. After FI's are produced, the system updates the Approved Thru date to Today's date to ensure that a participant that comes in prior to their next pick up day is not issued FI's for the following month until the food package has been approved.
Appointment Scheduler

Section 1 - 6 : Outputs

Section 1 - 6.1 : Labels

Section 1 - 6.1.1 : Performing Appointment Label Selection

Window: Appointment Label Selection

Report: Yes

Narrative:

This window allows the user to select which Participants listed for appointments will have labels printed for them. The user can search for appointments based upon the Clinic, Appointment From Date, Appointment To Date, Attendance Status, Category, Service and/or Family ID. The Clinic, Appointment From Date and Appointment To Dates are mandatory and an additional combination of the remaining criteria fields is optional. The screen allows the user to select type of Avery label to print on based upon the Avery code number.

After searching the database, the system returns the results from which the user can individually choose those Participants for which to print labels. The user can also opt to click the Select All w/o Confidentials push button to select all Participant labels to print except for those with a confidentiality flag checked in the Certification section or click the Select All with Confidentials push button to select all Participant labels to print except for those without a confidentiality flag checked in the Certification section. The user can then start the printing by clicking the print icon. When the user clicks the printer icon, the system will automatically print this report to the Clinic's or Agency's predetermined label printer.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>REPORTS</td>
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</tr>
<tr>
<td>VIEWER</td>
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</tr>
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<td>SA_OPERATIONS</td>
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<td>AZ_DEVELOPER</td>
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</tr>
</tbody>
</table>
Section 1 - 6.1.1.1: Appointment Label Selection

Figure 52 - Appointment Label Selection Parameter Form

Fields

Label – The user selects the type of Avery Label she wants to print the address(es) on by choosing the appropriate Avery Label code number. This field is mandatory.

Clinic - Clicking on the list of values button allows the user to select a Clinic to be reported on. For more information, please refer to the Organizational Units window in Operations Management. This field is mandatory.

Appointment From Date - The date of appointments, for which the labels are generated is entered here by the user. This field is mandatory.

Appointment To Date - The date of appointments, for which the labels are generated is entered here by the user. This field is mandatory.

Attendance Status - Clicking the list of values button allows the user to select the type of appointment status (Kept, Missed, Pending) to query on. For more information, please refer to the Attendance Statuses window. This field is optional.

Category - Clicking the list of values button allows the user to select the Participant category type to query on. For more information, please refer to the Maintain Categories window in Enrollment and Certification. This field is optional.

Service - Clicking the list of values button allows the user to select the appointment service type to query on. For more information, please refer to the Program Services window. This field is optional.

Family ID – Clicking on the list of values button allows the user to select the ID of the family for which to print labels. This is used to print just a single label. This field is optional.

Results
Client ID - The identification number of the Participant for the Participant record returned by the query. This field is display only.

Authorized Rep1 Last Name - The last name of the authorized representative for the Participant. This field is displayed from the Participant ID.

Authorized Rep1 First Name - The first name of the authorized representative for the Participant. This field is displayed from the Participant ID.

MI1 - The first middle initial of the authorized representative for the Participant. This field is displayed from the Participant ID.

MI2 - The second middle initial of the authorized representative for the Participant. This field is displayed from the Participant ID.

Service - The service or activity for the Participant appointment record returned by the query. This field is display only.

Check Box(es)

Select for Print - Selecting this box enables this Participant's label to be printed.

Push Button(s)

Select All w/o Confidential - Clicking this button selects labels to print for all Participants without a confidential flag selected in their certification record.

Select All with Confidential - Clicking this button selects labels to print for all Participants with a confidential flag selected in their certification record.

Sort Criteria (Major to Minor):

Participant ID (Ascending)

Calculations:

None

Background Processes:

The system displays the appropriate values for the Participant Appointment Labels based upon the criteria entered on the Appointment Labels screen.
Appointment Scheduler

Section 1 - 6.1.2 : Daily Schedule

Priority: Required
Window: Daily Schedule
Report: Yes

Narrative:

This window allows the user to create a Daily Schedule report for a clinic for a single date. The report is sorted by Time; earlier appointments showing first, then appointments scheduled later in the day displayed afterwards.

If an individual appointment is displayed, the client last name and first name will be shown with no information displayed in the corresponding count column for that appointment. If it is a class appointment, the class name will be displayed, but not client names will be listed.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
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</tr>
</thead>
<tbody>
<tr>
<td>REPORTS</td>
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</tr>
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</tbody>
</table>
Section 1 - 6.1.2.1 : Daily Schedule

![Daily Schedule Parameter Form](image)

**Figure 53 – Daily Schedule Parameter Form**

**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.

**Clinic** - Clicking on the list of values button allows the user to select a Clinic to query on. For more information, please refer to the Organizational Units window in Operations Management.

**Appt Date** - The user may enter the 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.
# Arizona WIC Program

## DAILY SCHEDULE

Appointment Date: MM/DD/YYYY

Clinic: XX XXXXXXXXXXXXXXXXXXX

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</tr>
</tbody>
</table>

**Figure 54 – Daily Schedule**

Sort Criteria (Major to Minor):

- **Time (Ascending)**

  *Calculations:*

  None

  *Background Processes:*

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

Section 1 - 6.1.3 : Producing a List of Appointments Report

Priority: Required

Window: List of Appointments

Report: Yes

Narrative:

This window allows the user to display a day’s appointment data for all Clinics in a Local Agency or a single Clinic, sorted by Staff, Time or Service.

Business Rules

- The user will be able to view the Client ID, Authorized Rep and Phone Number* for the family on the report

* Confidential Phone Numbers will not be displayed

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
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Section 1 - 6.1.3.1 : List of Appointments Parameter Form

![List of Appointments Parameter Form](image)

**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.

**Date From**/**Thru** - The appointment date range that the report will select records on. These fields are required.

**Agency** – The user may select their local agency from the list of values or select “All”.

**Clinic** - Clicking on the list of values button allows the user to select a Clinic to query on. For more information, please refer to the Organizational Units window in Operations Management. If CLINIC is selected in the Report Type field, then this field is used and is mandatory. If ALL CLINICS is selected, this field isn't used.

**Category** – The user may select one or ALL Categories from the list.

**Priority** - The user may select one or ALL Priorities from the list.

**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.
Arizona WIC Program
LIST OF APPOINTMENTS
Appointment Date: MM/DD/YYYY Thru MM/DD/YYYY
Local Agency: All Local Agencies
Clinic: All Clinics
Category: All
Priority: All

Local Agency: XX Xxxxxxxxxxxxxxxxxxxxxx
Clinic: XX Xxxxxxxxxxxxxxxxxxxxxx

<table>
<thead>
<tr>
<th>Family ID</th>
<th>Authorized Rep</th>
<th>Address</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXX</td>
<td>XXXXXXXX</td>
<td>XXXXXXXX</td>
<td>(XXX) XXX-XXXX</td>
</tr>
<tr>
<td></td>
<td></td>
<td>XXXXXXXX</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Start Time</th>
<th>Client Name</th>
<th>Service</th>
<th>Language</th>
<th>Staff Name</th>
</tr>
</thead>
<tbody>
<tr>
<td>MM/DD/YYYY</td>
<td>HH:MI</td>
<td>XXXXX, XXXXXXX</td>
<td>XXXXXXX</td>
<td>XXXXXXXXX</td>
<td>XXXXXXX</td>
</tr>
</tbody>
</table>

Phone# will not be displayed if the client’s Phone Confidentiality is checked)

Figure 56 - List of Appointments
Sort Criteria (Major to Minor):
Local Agency Org Code (Ascending)
Clinic Org Code (Ascending)
Family ID (Ascending)
Client Name (Ascending)
Appointment Date (Ascending)

Calculations:

None

Background Processes:

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

Section 1 - 6.1.4 : Producing a List of Missed Appointments Report

Priority: Required

Window: List of Missed Appointments

Report: Yes

Narrative:

This report allows the Local Agency and WIC Clinics to report the appointments, which have been missed by: Clinic, Family, Participant, date, and start time, along with details about the Participant. This report provides a history of missed appointments. For Participants with confidentiality checked on their Certification record, the term "no phone calls" will be displayed on the report under the Phone field.

Business Rules

- Food Plus clients who receive certification services or updates to their records won’t appear on the report
- Breastfed infants will not appear on the report if modifications were done to their record, or their mother’s record
- Clients who have shown for another appointment in the same month will not appear on the report.
- Clients who have an appointment kept within the last 15 days (backward from the Date From entered) and/or clients who have a pending appointment within the next 15 days (forward from the Thru Date) will NOT show on this report.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>REPORTS</td>
<td>N</td>
</tr>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>N</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>APPT_SCHEDULER</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 6.1.4.1 : List of Missed Appointments Parameter Form

![List of Missed Appointments Parameter Form](image)

**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.

**Report Type** – The user may select from the LOV (ALL CLINICS, CLINIC).

**Clinic** – The user may select their ALL or one Clinic from the list.

**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.
LIST OF MISSED APPOINTMENTS
Appointment Date: MM/DD/YYYY Thru: MM/DD/YYYY
(Report Type)

Local Agency: XXXX XXXXXXXXXXXXXXXX
Clinic: XX XXXXXXXXXXXXXXXX

<table>
<thead>
<tr>
<th>Family ID</th>
<th>Authorized Rep Name</th>
<th>Address</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXX</td>
<td>XXXXXXXXXXXXXXX, XXXXXXXX</td>
<td>XXXXXXXXXXXXXXXX</td>
<td>(XXX) XXX-XXXX</td>
</tr>
<tr>
<td></td>
<td></td>
<td>XXXXXXXXXXXXXXXX</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>XXXXXXXX XX XXXXX-XXXX</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Start Time</th>
<th>Client Name</th>
<th>Service</th>
<th>Language</th>
</tr>
</thead>
<tbody>
<tr>
<td>MM/DD/YYYY</td>
<td>XXX:XX</td>
<td>XXXXXXXXXXXXXXXX, XXXXXXXXXXXX</td>
<td>XXXX</td>
<td>XXX</td>
</tr>
<tr>
<td>MM/DD/YYYY</td>
<td>XXX:XX</td>
<td>XXXXXXXXXXXXXXXX, XXXXXXXXXXXX</td>
<td>XXXX</td>
<td>XXX</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Family ID</th>
<th>Authorized Rep Name</th>
<th>Address</th>
<th>Phone</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXX</td>
<td>XXXXXXXXXXXXXXX, XXXXXXXX</td>
<td>XXXXXXXXXXXXXXXX</td>
<td>(XXX) XXX-XXXX</td>
</tr>
<tr>
<td></td>
<td></td>
<td>XXXXXXXXXXXXXXXX</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>XXXXXXXX XX XXXXX-XXXX</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Date</th>
<th>Start Time</th>
<th>Client Name</th>
<th>Service</th>
<th>Language</th>
</tr>
</thead>
<tbody>
<tr>
<td>MM/DD/YYYY</td>
<td>XXX:XX</td>
<td>XXXXXXXXXXXXXXXX, XXXXXXXXXXXX</td>
<td>XXXX</td>
<td>XXX</td>
</tr>
<tr>
<td>MM/DD/YYYY</td>
<td>XXX:XX</td>
<td>XXXXXXXXXXXXXXXX, XXXXXXXXXXXX</td>
<td>XXXX</td>
<td>XXX</td>
</tr>
</tbody>
</table>

(*Note - Only one of these three values will appear on the report depending upon the user selection in the parameter screen)

Figure 58 - List of Missed Appointments
Sort Criteria (Major to Minor):
Organizational Unit Code (Ascending)
Family ID (Ascending)
Calendar Date (Ascending)
Appointment Start Time (Ascending)
Client Name (Ascending)

Calculations:
None

Background Processes:

The Clinics available for selection by the user are based upon the Local Agency and Clinic codes entered by the user in the Arizona WIC -[Log On] screen.
Section 1 - 6.1.5 : Producing an Appointment Status Summary Report

Priority: Required

Window: Appointment Status Summary Report

Report: Yes

Narrative: This report allows the Local Agency and WIC Clinics to summarize the appointment services, which are missed, kept, rescheduled, walk-ins or deleted/cancelled for the specified date range.

Business Rules
- Client names will not be displayed on this report

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>REPORTS</td>
<td>N</td>
</tr>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>N</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>APPT_SCHEDULER</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 6.1.5.1 : Appointment Status Summary Parameter Form

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.
Report Type - Clicking on the list of values button allows the user to generate a report for all Clinics or a single Clinic. The user selectable values in this list are stored in a pre-programmed domain. The values stored in this domain are: CLINIC and ALL CLINICS.
Clinic - Clicking on the list of values button allows the user to select a Clinic to query on. For more information, please refer to the Organizational Units window in Operations Management. If CLINIC is selected in the Report Type field, then this field is used and is mandatory. If ALL CLINICS is selected, this field isn't used.
Appointment Date 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.
### Arizona WIC Program

**APPOINTMENT STATUS SUMMARY**

Appointment Date From: MM/DD/YYYY Thru: MM/DD/YYYY

<table>
<thead>
<tr>
<th>Service</th>
<th>Missed</th>
<th>Kept</th>
<th>Resched</th>
<th>Walk-in</th>
<th>Delete/Cancel</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXXX</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
</tr>
<tr>
<td>XXXXXXXXX</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
</tr>
<tr>
<td>XXXXXXXXX</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
<td>ZZZZ9</td>
</tr>
</tbody>
</table>

Totals:          | ZZZZ9  | ZZZZ9| ZZZZ9   | ZZZZ9   | ZZZZ9         | ZZZZ9 |

Staff Name: XXXXXXXXXX, XXXXXXXXXXX

**Figure 60 - Appointment Status Summary**
Sort Criteria (Major to Minor):
Organizational Unit Code (Ascending)
Calendar Date (Ascending)
Staff Member Last Name (Ascending)
Staff Member First Name (Ascending)
Service Description (Ascending)

Calculations:

**Counts** - COUNT(Participants missing each Service)
COUNT(Participants keeping each Service)
TOTAL(Missed plus Kept)

Background Processes:

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

Section 1 - 6.1.6 : Producing a No Show Rate Report

Priority: Required

Window: No Show Rate

Report: Yes

Narrative:

This window allows the user to retrieve, calculate, and display No Show Rates by service for all or a single Clinic in a Local Agency for a selected month and year. The report generated will provide a duplicate count for people who are no-shows more than once for the month and year selected on the Parameter Form.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>REPORTS</td>
<td>N</td>
</tr>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>N</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>APPT_SCHEDULER</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 6.1.6.1 : No Show Rate Parameter Form

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 - If printer is selected (above) the number of copies desired is entered.

Level - Clicking on the list of values button allows the user to generate a report for all Clinics or a single Clinic. The user selectable values in this list are stored in a pre-programmed domain.

The values stored in this domain are: CLINIC and ALL CLINICS.

Clinic - Clicking on the list of values button allows the user to select a Clinic to query on. For more information, please refer to the Organizational Units window in Operations Management.

If CLINIC is selected in the Level field, then this field is used and is mandatory. If ALL CLINICS is selected, this field isn't used.

Issue Month - Clicking on the list of values button allows the user to select the three-letter abbreviation of the month that the report will select records on. The user selectable values in this list are stored in a pre-programmed domain. The values stored in this list are: JAN, FEB, MAR, APR, MAY, JUN, JUL, AUG, SEP, OCT, NOV, DEC.

Year - The user enters the year that the report will select records on. The year is entered in YYYY format. This field is mandatory.

Report Fields

Service - A_SERVICES.DESCRIPTION

Clinic - O_ORGANIZATIONAL_UNITS.NAME

No Show Rate – Calculated Field

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.
### Arizona WIC Program

#### NO SHOW RATE

**Issue Month:** MMM YYY

#### Single Clinic

<table>
<thead>
<tr>
<th>Service</th>
<th>No Show Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXXXX</td>
<td>999.9%</td>
</tr>
<tr>
<td>XXXXXXXXXX</td>
<td>999.9%</td>
</tr>
</tbody>
</table>

**Average for all services:** 999.9%

---

### Arizona WIC Program

#### NO SHOW RATE

**Issue Month:** MMM YYYY

#### All Clinics

<table>
<thead>
<tr>
<th>Service</th>
<th>Clinic</th>
<th>No Show Rate</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXXXX</td>
<td>XXXXXXXXXX</td>
<td>999.9%</td>
</tr>
<tr>
<td>XXXXXXXXXX</td>
<td>XXXXXXXXXX</td>
<td>999.9%</td>
</tr>
<tr>
<td>XXXXXXXXXX</td>
<td>XXXXXXXXXX</td>
<td>999.9%</td>
</tr>
</tbody>
</table>

**Local Agency Average:** 999.9%

---

**Figure 62 - No Show Rate**
Sort Criteria (Major to Minor):

Organizational Unit Code - Local Agency (Ascending)
Service Description (Ascending)
Organizational Unit Code - Clinic (Ascending)

Calculations:

No Show Rate - (Participants with Missed Attendance Statuses / Scheduled Participant Appointments) X 100
Average for all services: (Single Clinic) – % of (Total # of missed appt. clients / Total missed/kept appt. clients)
Local Agency Average by Service (All Clinics) - % of (Total # of missed appt. clinics / (Total # of missed/kept appt. clinics) for each service

Background Processes:

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

The No Show Rate Report is based on which clinic provided services at the time of the appointment during the month/Year that the report is run.

The appointment are pulled form the ‘AAS_APPOINTMENTS’ table and the services related to the appointments are pulled form the ‘C_CLIENT_SERVICES’ table.
Appointment Scheduler

Section 1 - 6.1.7  : Producing an Appointment Overrides Report

Priority: Required

Window: Appointment Overrides

Report: Yes

Narrative:

This window allows the user to display for a single Clinic or ALL CLINICS in a Local Agency, Appointments that were overridden by users. The report will display both the name of the staff member who performed the overriding of the appointment and the staff who was assigned the appointment. Included in these are:

- Appointments that had a different service assigned than the one that was scheduled for that slot
- Appointments in which the primary language of the staff member and Family do not match
- Appointments which were scheduled outside the Federal Processing Standards

The report will be used by Arizona Clinic supervisors to determine which staff are performing overrides to appointments. The information used to indicate if an appointment is overridden will be captured in the AAS_APPOINTMENTS table at the time the user message is displayed and then overridden by the user and the appointment is committed to the database. The report will only be available to show those overridden appointments in the past for as long as Arizona chooses to maintain online appointment records in the database. Should Arizona choose to select records whose appointment dates are more than 90 days in the past and appointments older than 90 days are archived off the database, those overridden appointments will not be displayed on this report.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>REPORTS</td>
<td>N</td>
</tr>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>N</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>APPT_SCHEDULER</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 6.1.7.1  : Override Appointments Parameter Form

![Override Appointments Parameter Form](image)

**Figure 63 –Override Appointments Parameter Form**

**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.

**Clinic** - Clicking on the list of values button allows the user to select a Clinic or ALL CLINICS within a Local Agency to query on. For more information, please refer to the Organizational Units window in Operations Management.

**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.
## Arizona WIC Program

**APPOINTMENT OVERRIDE**

From: MM/DD/YYYY Thru: MM/DD/YYYY

Local Agency XX XXXXXXXXXXXX  Clinic: XX XXXXXXXXXXX

<table>
<thead>
<tr>
<th>Date</th>
<th>Time</th>
<th>Assigned By</th>
<th>Assigned To</th>
<th>Service Override</th>
<th>Language Override</th>
<th>Outside Federal Guidelines</th>
</tr>
</thead>
<tbody>
<tr>
<td>MM/DD/YYYY</td>
<td>HH:MM</td>
<td>XXXXXXXXX, XX XXXXXXX XXXXXX XXXXXX, XXXXXX</td>
<td>Y</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MM/DD/YYYY</td>
<td>HH:MM</td>
<td>XXXXXXXXX, XX XXXXXXX XXXXXX XXXXXX, XXXXXX</td>
<td>Y</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>MM/DD/YYYY</td>
<td>HH:MM</td>
<td>XXXXXXXXX, XX XXXXXXX XXXXXX XXXXXX, XXXXXX</td>
<td>Y</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

### Figure 64 – Appointment Override Report

**Sort Criteria (Major to Minor):**
- Organizational Unit Code - Local Agency (Ascending)
- Organizational Unit Code - Clinic (Ascending)
- Date (Ascending)
- Time (Ascending)

**Calculations:**

None

**Background Processes:**

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

Section 1 - 6.1.8  : Staff Schedule

Priority:  Required

Window:  Staff Schedule

Report:  Yes

Narrative:

This window allows the user to create a Staff Schedule report for a clinic, staff member and/or language for a single date. The report is sorted by Start Time; earlier appointments showing first, then appointments scheduled later in the day displayed afterwards.

Data Current As Of:  Run Time

Frequency:  On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>REPORTS</td>
<td>N</td>
</tr>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>N</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>APPT_SCHEDULER</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 6.1.8.1 : Staff Schedule

![Staff Schedule Report](image)

Figure 65 – Staff Schedule Parameter Form

**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.

**Clinic** - Clicking on the list of values button allows the user to select a Clinic to query. For more information, please refer to the Organizational Units window in Operations Management.

**Staff** – Clicking this list of values button allows the user to select a specific staff member to query.

**Date** - The user may enter the date of the appointments that will appear on the report.

**Language** – Clicking this list of values button allows the user to select a specific staff member to query.

**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.
Clinic: XX XXXXXXXXXXXXXXXXXXXXXXXX
Staff: XXXXXXXXXX XXXXXXXXXX

<table>
<thead>
<tr>
<th>Start</th>
<th>End</th>
<th>Service</th>
<th>Family/Group Class</th>
<th>Attendance</th>
</tr>
</thead>
<tbody>
<tr>
<td>XX:XX</td>
<td>XX:XX</td>
<td>XXXX</td>
<td>XXXXXXXXXX</td>
<td>XXXXXXXXXX</td>
</tr>
<tr>
<td>XX:XX</td>
<td>XX:XX</td>
<td>XXXX</td>
<td>XXXXXXXXXX</td>
<td>XXXXXXXXXX</td>
</tr>
<tr>
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<td>XXXXXXXXXX</td>
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</tr>
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<td>XX:XX</td>
<td>XX:XX</td>
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<td>XXXXXXXXXX</td>
<td>XXXXXXXXXX</td>
</tr>
<tr>
<td>XX:XX</td>
<td>XX:XX</td>
<td>XXXX</td>
<td>XXXXXXXXXX</td>
<td>XXXXXXXXXX</td>
</tr>
</tbody>
</table>

Figure 66 – Daily Schedule

Sort Criteria (Major to Minor):

**Start Time (Ascending)**

*Calculations*:

None

*Background Processes*:

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

Section 1 - 6.1.9 : Producing a Summary of Group/Class Appointments Report

Priority: Required

Window: Summary of Group/Class Appointments

Report: Yes

FSRD Reference: AS 12.2

Narrative:

This window allows the user to generate a summary of Group/Class Appointments and topics offered at appointments attended or missed by Participants. The report can be run for all Clinics or a single Clinic in a Local Agency for a user specified date range. The report is sorted by Class Category, then by Class Name.

Data Current As Of: Run Time

Frequency: On Demand

Role(s):

<table>
<thead>
<tr>
<th>Role Name</th>
<th>View Only</th>
</tr>
</thead>
<tbody>
<tr>
<td>REPORTS</td>
<td>N</td>
</tr>
<tr>
<td>VIEWER</td>
<td>Y</td>
</tr>
<tr>
<td>SA_OPERATIONS</td>
<td>N</td>
</tr>
<tr>
<td>SA_VIEWER_1</td>
<td>Y</td>
</tr>
<tr>
<td>AZ_DEVELOPER</td>
<td>N</td>
</tr>
<tr>
<td>SUPERINTENDENT</td>
<td>N</td>
</tr>
<tr>
<td>SYSADM</td>
<td>N</td>
</tr>
<tr>
<td>APPT_SCHEDULER</td>
<td>N</td>
</tr>
</tbody>
</table>
Section 1 - 6.1.9.1 : Summary of Group/Class Appointments Parameter Form

![Summary of Group/Class Appointments Parameter Form](image)

Figure 67 - Summary of Group/Class Appointments Parameter Form

**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.

**Level** - Clicking on the list of values button allows the user to generate a report for all Clinics or a single Clinic. The user selectable values in this list are stored in a pre-programmed domain. The values stored in this domain are: CLINIC and ALL CLINICS.

**Clinic** - Clicking on the list of values button allows the user to select a Clinic to query on. For more information, please refer to the Organizational Units window in Operations Management.

**Appointment 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.
Arizona WIC Program
SUMMARY OF GROUP/CLASS APPOINTMENTS
Appointment Dates From: MM/DD/YYYY Thru: MM/DD/YYYY

Local Agency: XX  XXXXXXXXXXXXXXXX
Clinic:          XX  XXXXXXXXXXXXXXXX

<table>
<thead>
<tr>
<th>Category</th>
<th>Group/Class Name</th>
<th>Attendees</th>
<th>Missed</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXX Xxxxxxxxxxxxxxxxxx</td>
<td>ZZ,ZZ9</td>
<td>ZZ,ZZ9</td>
<td>ZZ,ZZ9</td>
<td></td>
</tr>
<tr>
<td>XXXXXXXX Xxxxxxxxxxxxxxxxxx</td>
<td>ZZ,ZZ9</td>
<td>ZZ,ZZ9</td>
<td>ZZ,ZZ9</td>
<td></td>
</tr>
<tr>
<td>XXXXXXXX Xxxxxxxxxxxxxxxxxx</td>
<td>ZZ,ZZ9</td>
<td>ZZ,ZZ9</td>
<td>ZZ,ZZ9</td>
<td></td>
</tr>
</tbody>
</table>

Local Agency Totals:  ZZZ,ZZ9  ZZZ,ZZ9  ZZZ,ZZ9

---

Arizona WIC Program
SUMMARY OF GROUP/CLASS APPOINTMENTS
Appointment Date From: MM/DD/YYYY Thru: MM/DD/YYYY
Summary

Local Agency XX  XXXXXXXXXXXXXXXX

<table>
<thead>
<tr>
<th>Category</th>
<th>Group/Class Name</th>
<th>Attendees</th>
<th>Missed</th>
<th>Total</th>
</tr>
</thead>
<tbody>
<tr>
<td>XXXXXXXX Xxxxxxxxxxxxxxxxxx</td>
<td>ZZ,ZZ9</td>
<td>ZZ,ZZ9</td>
<td>ZZ,ZZ9</td>
<td></td>
</tr>
<tr>
<td>XXXXXXXX Xxxxxxxxxxxxxxxxxx</td>
<td>ZZ,ZZ9</td>
<td>ZZ,ZZ9</td>
<td>ZZ,ZZ9</td>
<td></td>
</tr>
<tr>
<td>XXXXXXXX Xxxxxxxxxxxxxxxxxx</td>
<td>ZZ,ZZ9</td>
<td>ZZ,ZZ9</td>
<td>ZZ,ZZ9</td>
<td></td>
</tr>
</tbody>
</table>

State Agency Totals:  ZZZ,ZZ9  ZZZ,ZZ9  ZZZ,ZZ9

---

Figure 68 - Summary of NE Appointments

Sort Criteria (Major to Minor):

Organizational Unit Code (Ascending)
Category (Ascending)
Group/Class Name (Ascending)
Calculations:

- **Attendees** - COUNT (Attendees by service)
- **Missed** - COUNT (Missed by service)
- **Total for Service** - SUM(Attendees plus Missed)
- **Local Agency/State Agency Totals** - SUM (Columns)

Background Processes:

The Clinics available for selection by the user on the Parameter Form are based upon the Local Agency and Clinic codes entered by the user in the Arizona WIC-[Log On] screen.
Section 1 - 6.1.10 : Producing a List of Missed Appointments Unreached by Autodialer Report

Priority: Required

Window: List of Missed Appointments Unreached by Autodialer

Report: Yes

FSRD Reference: AS 12.2

Narrative:

This report allows the Local Agency and WIC Clinics to report the appointments, which have been missed by Clinic, Participant, date, start time, and were not reached by the autodialer mechanism. ***This report Parameter Form and format has been described to be similar to the List of Missed Appointments Report above, but final decision as to the selection criteria and final report design will be made following implementation of the autodialer mechanism.***

Data Current As Of: Run Time

Frequency: On Demand

Role(s): Appointment Scheduler
Section 1 - 6.1.10.1 : List of Missed Appointments Unreached by Autodialer Parameter Form

***Screen Design to be determined***

Figure 69 - List of Missed Appointments Unreached by Autodialer Parameter Form

Fields

**Output Device** - The user may select from a drop down list: screen, file, printer, mail, or preview.

**Filename** - If file is selected (above), the directory and filename are entered.

**Number of Copies** - If printer is selected (above) the number of copies desired is entered.

**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.

**Level** - This list of values gives the user the choice of the type of report to be generated, either by State/Local or Local/Clinics.

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):

To be determined.

Calculations:

To be determined.

Background Processes:

To be determined.
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<td>185</td>
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</tbody>
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Section 1 - 7.1  Creating an Appointment Sheet
Section 1 - 7.2  Find and Create an Appointment

Splash screen for New Appointment Scheduler

Arizona Appointment Scheduler Process Flow
Find and Create an Appointment

Scheduling/Appointments

From Family Record - Client/Family Lookup

Return with Family Info

Appointment Sheet

APPT DETAIL
Authorized Rep. Time Slot
Staff Duration
Client 1 Category Outcome
Appt Type
Client 2 Category Outcome
Appt Type

Choose Time Slot(s) with Staff
- populates duration in Appt. Detail box
- duration to be 1. controlled by appt type, or 2. manually enter/delete time. Will it affect individual appt types?

Click - Make New Appointment

1. Select Calendar Day

2. Available Appt. Search

Select Appt Type of each Family Member

System Fills Slot(s) with Family Info (authorized rep. name or family ID #??)

Save

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Section 1 - 7.3 Edit an Appointment

Arizona Appointment Scheduler Process Flow
Edit an Appointment

Find Client - Client/Family Lookup

Return with Client Info

Appointment Sheet

Edit Appointment

Delete Appointment - select client's appt. time

System Auto - Edit Appointment in Appt. Detail Box

Cut and Paste to Another Appt. Day

Highlight Appointment Time

Select Calendar Day

Edit Appointment in Appt. Detail Box

Click Delete Button
Section 1 - 7.4 Class Setup

Arizona Appointment Scheduler
Process Flow
Classes Setup

Class categories
Create classes to be reused in the future
Set up classes
Schedule Classes
View the list of Classes in the Appointment Sheet
Publish the Scheduled Class to a calendar date
Section 1 - 7.5 Making a Class Appointment

1. Find Family - Client/Family Lookup
   Jump with family id number

2. Click on Classes Tab
   List of classes to choose from

3. Click on the desired class

4. Class Attendance assigned the client to a class and is modifiable
   attended individually using Attendance LOV

5. All Attended

6. To View the attendees in the Family Class Appointment

7. Save Class Assignment - Click on Appt Sheet

8. Double click on the Class Appt to Class Attendance

9. Select Do Not Print FI's for individuals not receiving food instruments (if applicable)

10. Print FI's

11. Click Include this retains class appt for the family
Section 1 - 7.6 Precertification through Enrollment and Certification

Arizona Appointment Scheduler Process Flow
Precertification through Enrollment and Certification

Perform a Client/Family Lookup in "all clinics" to query potential client
Client is new

Exit out of "all clinics"
Log in to specific AIM clinic

Click on the Enroll&Cert module
Click on Certification Info
Click on Cert. Action
Click on Precertification complete mandatory fields

Jump to the Appointment Scheduler choice - make appt, etc.

Create a Family Appointment or Enter a Family into a Group Class

Using pushbuttons, jump from On Demand to Appointment Scheduler or Class Assignments

Complete Enroll&Cert processes
Client Reg - Cert Action - Medical - Health - Diet Assess - Care Plan - Food Pkg - pushbutton to On Demand

Jump to the Family Info screen of the Enrollment and Certification module