Arizona Department of Health Services

Bureau of Nutrition and Physical Activity

HANDS WIC System

Detailed Functional Design Document

Appointment Scheduler

October 21, 2014

Version 1.0

Table of Contents

REVISION HISTORY

The chart below indicates revisions made to this document:

Version	Name	Brief Description of Change	Published
1.0	Kesavan Duraisamy	Initial Draft	02-27-2015

1 SCHEDULING OVERVIEW

The Scheduling module of HANDS is a brand new functionality for setting up and maintaining WIC clinic schedules and for making appointments for clients within a WIC family. HANDS Scheduler offers a variety of appointment styles for managing WIC clinic flow and appointment availability. This flexibility will help local agencies to better manage the daily clinic service flow and meet mandatory federal guidelines for the 10/20 rule for scheduling WIC clients. HANDS Scheduler allows traditional scheduling, open access scheduling, centralized appointment scheduling, walk in appointments and group appointments. The system has indicators to track all appointment activity. As a result, there will be a variety of Scheduling Reports which help clinic administration determine if the current schedule is meeting the requirements indicated by Arizona WIC Policy and Procedures. The design of the HANDS Scheduler area provides staff with easy navigation for scheduling and updating WIC appointments. For example, there are at least three different ways to add appointments for a WIC client located in both the Scheduler and WIC Services areas of HANDS. A clinic user could make an appointment for a client while in the certification area or by going directly to Scheduler. In addition, all client records within a family will be made available on the same screen for making, rescheduling or cancelling WIC appointments as needed.

Ease of access, variety and flexibility are also offered to Local Agencies in the setting up of clinic schedules. HANDS Schedule templates offer many appointment types, timeslots and columns which may be opened or blocked as needed without having to alter the entire schedule. Changes to a clinic schedule may be added for a certain day or range of days and HANDS provides alerts if there are any existing conflicts between the new and existing schedule.

<u>Services, Provider Columns, Time Slots & Nutrition Groups</u>

HANDS allows a considerable amount of flexibility when setting up and maintaining the clinic schedule. The schedule day is divided into Services, Provider Columns and Time Slots. The types of services and providers which a local agency chooses are maintained by each State Agency, including Navajo Nation, Guam, CNMI, and American Samoa. The local agencies determine the starting and ending times as well as the number of services and service providers per schedule day.

<u>Key Points or Highlights</u>

- Minimum duration for an appointment or a time slot is 15 Minutes.
- Appointment is at individual client level, so only one client will be scheduled in a timeslot for an appointment.
- ALL services include every service type, unlike AIM, which excluded High Risk, Nutrition Education and Medium Risk service types.
- Column Names and Services are base table controlled at Local Agency Level.
- Creating Templates, Clinic Calendar Setup and Appointment Scheduler can be accessed for any clinics within a local agency without having to log off.

- Automatic Client Transfer occurs when the client shows for the appointment and checks in to that appointment, which is scheduled in a clinic different from the clinic the client is enrolled in.
- Staff Members are not associated with appointment scheduler.
- Walk-in appointments are not shown in Calendar/Appointment scheduler.
- Searching for a family can be done in the Appointment Sheet using the Family ID only, or the user can search using either WIC or CSFP Services Client/Family search, select the record, and navigate to the Appointment Sheet.
- Three appointment types are color coded – Certification, Nutrition Discussion and High Risk Nutritionist appointment types. The system displays the appointment type of the service with the highest priority. For example, if a family has one participant needing a high risk contact and another participant requiring nutrition discussion, the high risk appointment color would be displayed in the scheduler. The High Risk Nutritionist appointment type has the highest priority, followed by the Certification appointment type, and the Nutrition Discussion is the lowest priority.

2 APPOINTMENT SERVICES

The Appointment Services page allows users to manage all the appointment services or types of appointments offered in the state. The list will be shared across every clinic in the state.

Administrators are able to control which services are displayed, the order in which they are displayed, the default duration of the service, and whether each service should be flagged for Certification, High Risk, Nutrition Discussion, and/or All Service Type.

Navigation Path: Sys Admin | Appt Scheduler Base Tables | Services

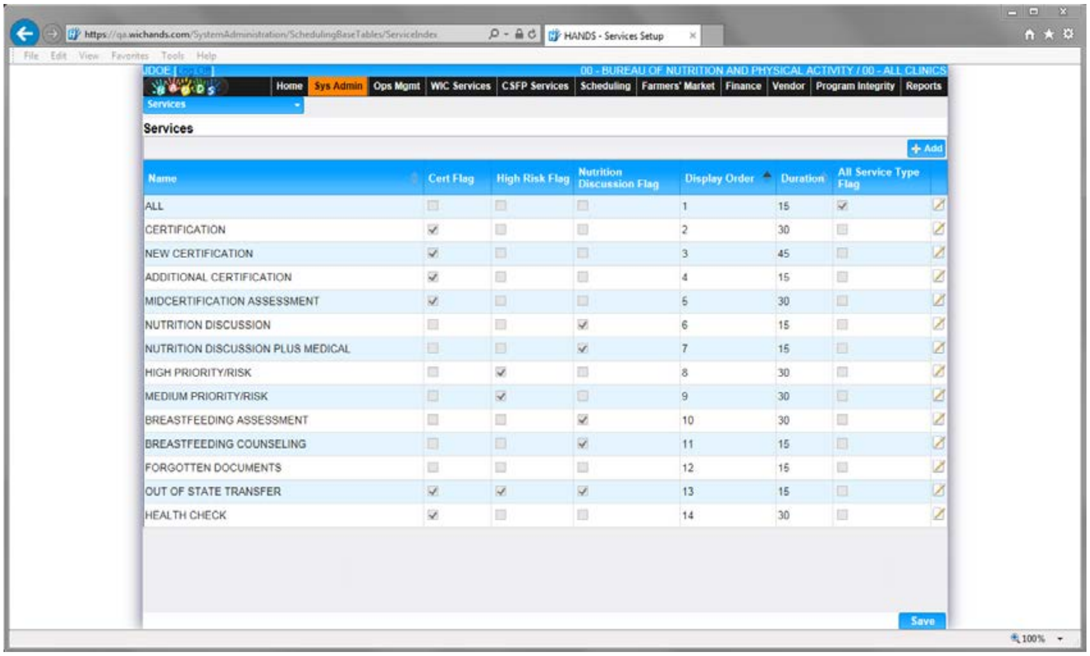


Fig 2.1) Appointment Services – Main Screen

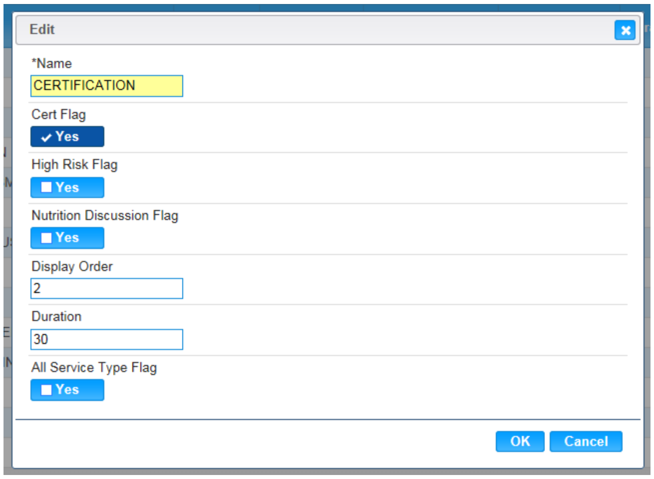


Fig 2.2) Appointment Services – Add/Edit Service

Fields:

- ***Name*** *- Name of appointment type.*
- ***Cert Flag*** *- Identifies that appointment is associated with certification.*

- ***High Risk Flag*** *- Identifies that appointment as high risk counseling.*
- ***Nutrition Discussion Flag*** *- Identifies that appointment is associated with Nutrition Discussion.*
- ***Display Order*** *- Setting up the order in which the services will be shown in any dropdown list or Appointment Scheduler.*
- ***Duration*** *- Setting up the default time for services, which will be used as a reference in the Pending Appointments Screen. The Pending Appointments Screen is used to suggest the future appointments for the clients.*
- ***All Service Type Flag*** *- Identifies the service as a special type of service used only in the Templates side. There should be only one service set as All Service.*

Buttons:

Add – *To add new appointment service type.*
Save – *To commit the changes made though add or edit services.*
OK – *Add or Edit Service updates the changes to the main page.*
Cancel – *To cancel changes made though add or edit services.*

Calculation(s): Validation will be performed to avoid any duplicate service getting created. A duplicate is any service corresponding in all respects to another service of the same type occurring at the same time.

Background Processes: None

3 COLUMN NAMES

The Column Names page allows users to manage common names that provide the service in each local agency. The list will be shared across every clinic in the local agency.

Navigation Path: Sys Admin | Appt Scheduler Base Tables | Columns

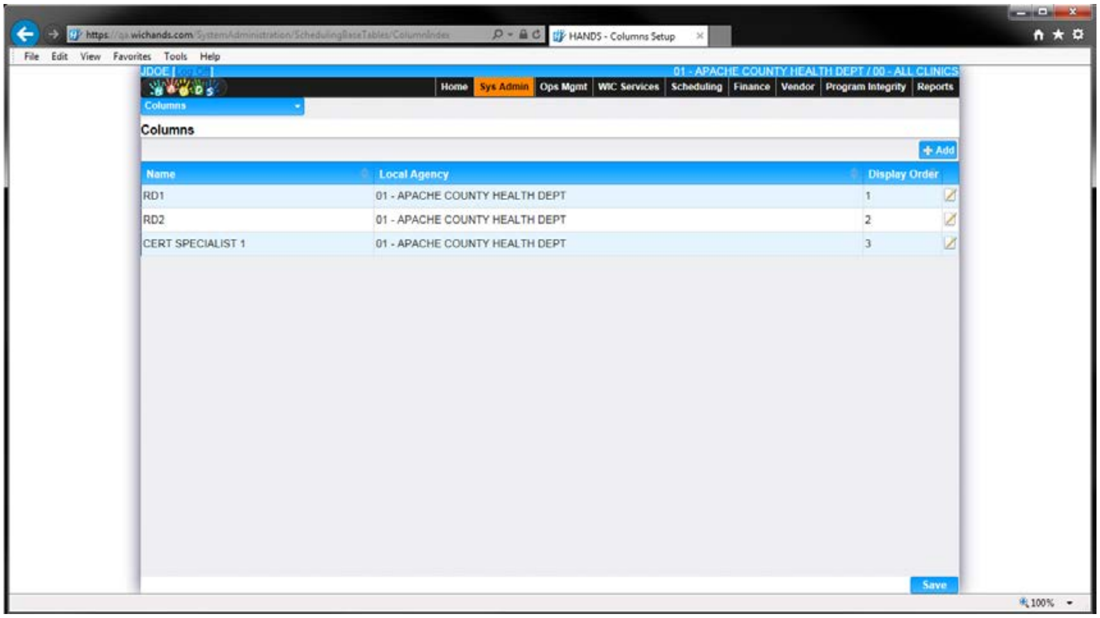


Fig 3.1) Column Names – Main Screen

Fig 3.2) Column Names – Add/Edit

Fields:

- ***Name*** *- Name of column name.*
- ***Local Agency*** *– Identifies the Local Agency in which column will be created.*
- ***Display Order*** *- Setting up the order in which the services will be shown in any dropdown list or Appointment Scheduler.*

Buttons:

Add *– To add new column name.*
Save *– To commit the changes made though add or edit column names.*
OK *– Add or Edit Service updates the changes made to the main page.*
Cancel *– To cancel changes made though add or edit column names.*

Calculation(s): Validation will be performed to avoid any duplicate columns getting created.

Background Processes: None

4 GROUP NAMES

The Group Names page allows users to manage and modify Nutrition Discussion Group Names provided in each local agency. The list will be shared across every clinic in the local agency.

Navigation Path: Sys Admin | Appt Scheduler Base Tables | Nutri. Disc Group Names

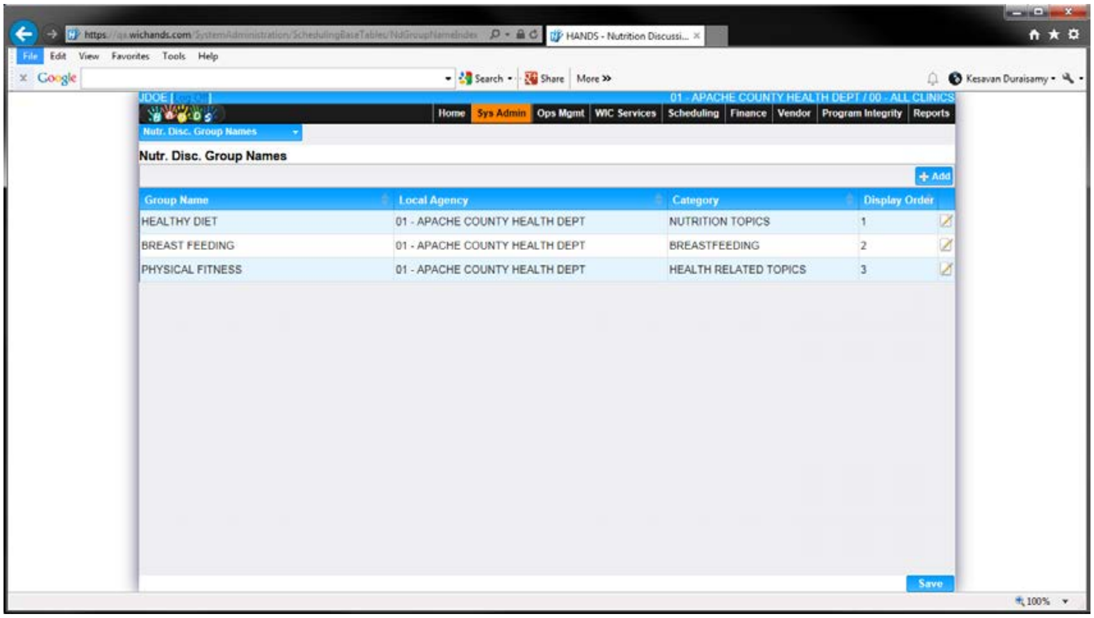


Fig 4.1) Nutri. Disc Group Names – Main Screen

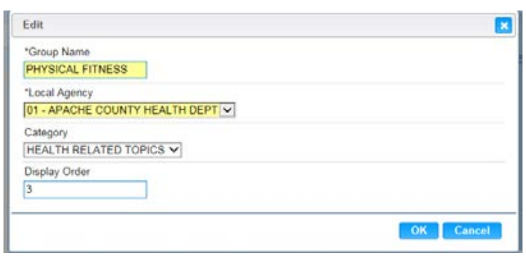


Fig 4.2) Nutri. Disc Group Names – Add/Edit

Fields:

- ***Name*** *- Name of Group Nutrition Education/Class.*
- ***Local Agency*** *– Identifies the Local Agency in which Group Class will be created.*
- ***Display Order*** *- Setting up the order in which the Group Names will be shown in any dropdown list.*
- ***Category –*** *Identifies the category of the Group Class for example Breastfeeding, Nutrition Topic or Health Related Topics etc.*

Buttons:

Add *– To add new group name.*
Save *– To commit the changes made though add or edit group names.*
OK *– Add or Edit Group Name updates the changes to the main page.*
Cancel *– To cancel changes made though add or edit group names.*

Calculation(s): Validation will be performed to avoid any duplicate group name getting created.

Background Processes: None

5 ITEMS – THINGS TO BRING

The Items-Things to Bring page allows users to manage the list of items to bring that are available to each local agency. The list will be shared across every clinic in the local agency.

Navigation Path: Sys Admin | Appt Scheduler Base Tables | Items

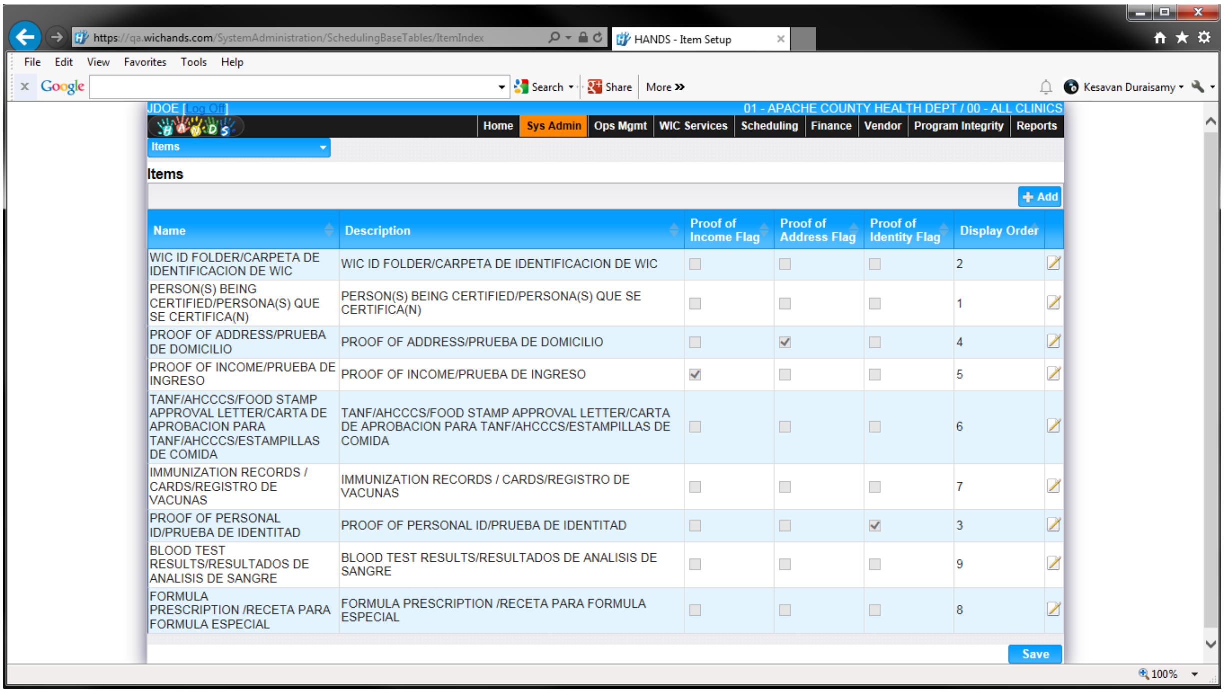


Fig 5.1)ITEMS – Main Screen

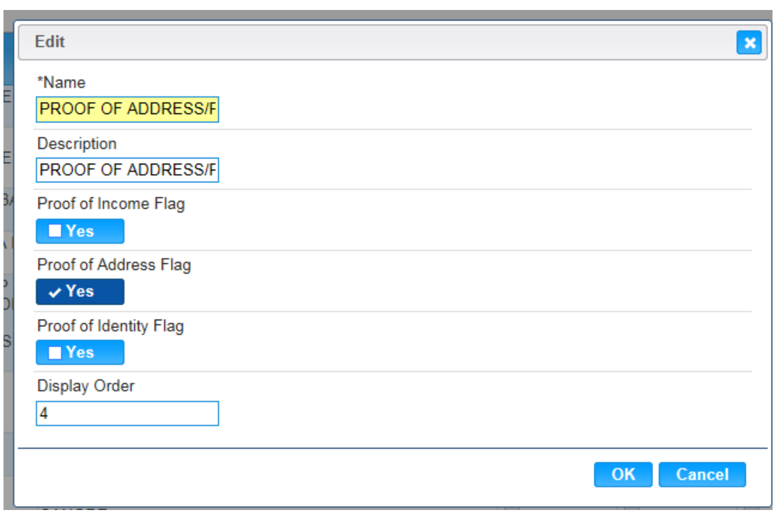


Fig 4.1) ITEMS – Add/Edit

Fields:

- ***Name*** *- Name of item to be brought with the clients for the appointment.*
- ***Description*** *– Description of the item to be brought with the clients for the appointment.*
- ***Proof Of Income Flag*** *- Identifies that the specific item as proof of income.*
- ***Proof Of Address Flag*** *- Identifies that the specific item as proof of address.*

- ***Proof Of Identity Flag** - Identifies that the specific item as proof of identity.*
- ***Display Order** - Setting up the order in which the items will be shown in any dropdown list.*

Buttons:

***Add** – To add new item.*
***Save** – To commit the changes made though add or edit items.*
***OK** – Add or Edit Item updates the changes to the main page.*
***Cancel** – To cancel changes made though add or edit items.*

Calculation(s): None

Background Processes: Three proof flags that are set will be used in the Pending Appointment Services to auto suggest the items, if the client actually forgot proof of income, address and identity respectively.

6 CLINIC DEFAULT SETTINGS

The Clinic Default Settings page provides the features to maintain basic scheduler settings for every clinic in the logged in agency. The scheduler settings include Default Hours of operation of a clinic and Closed days.

Navigation Path: Scheduling | Clinic Default Settings

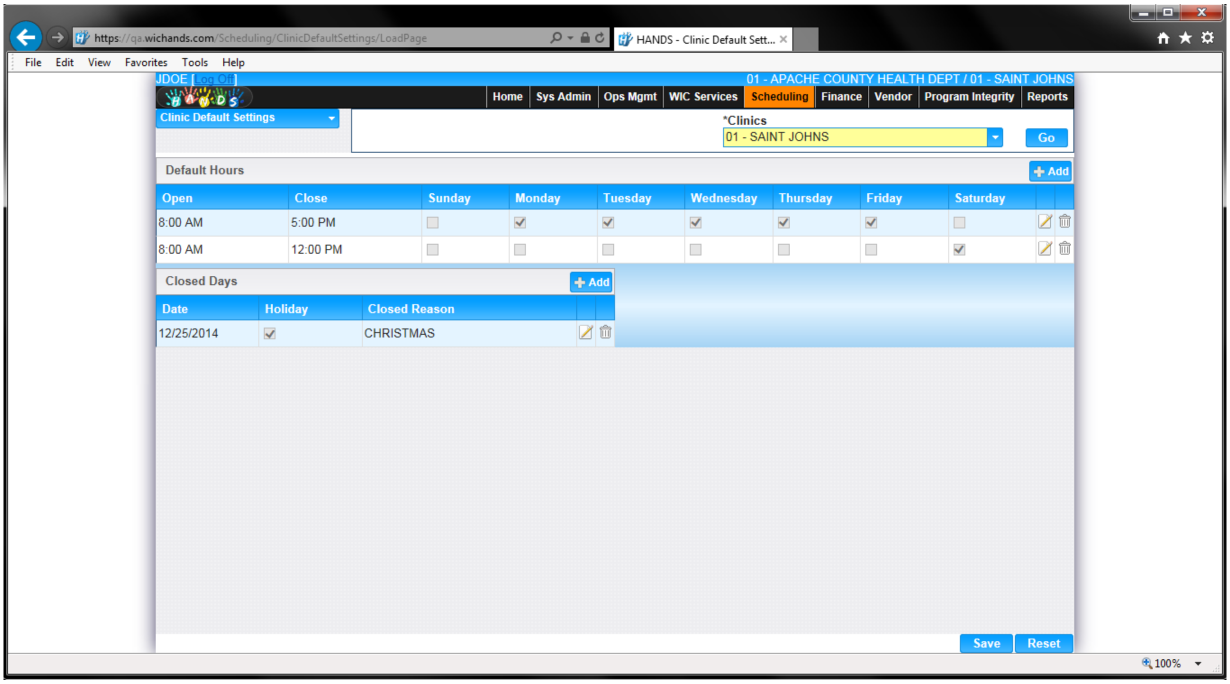


Fig 6.1) Clinic Default Settings – Main Screen

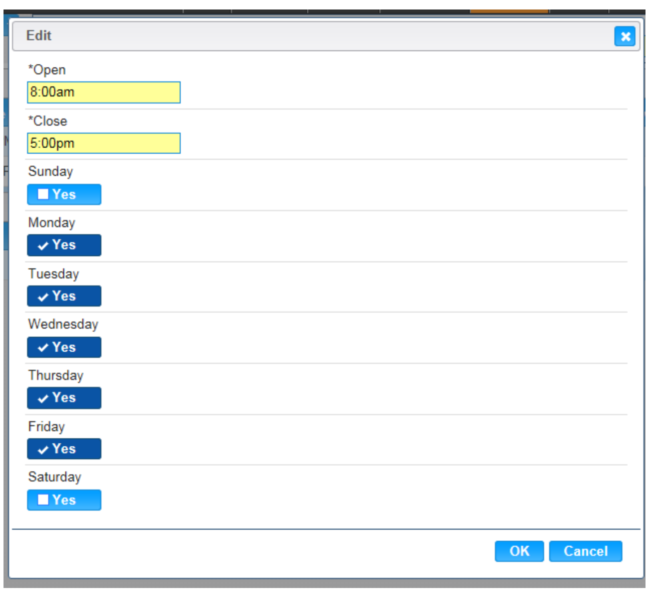


Fig 6.2) Clinic Defaulkt Settings – Add/Edit Defaul Hours

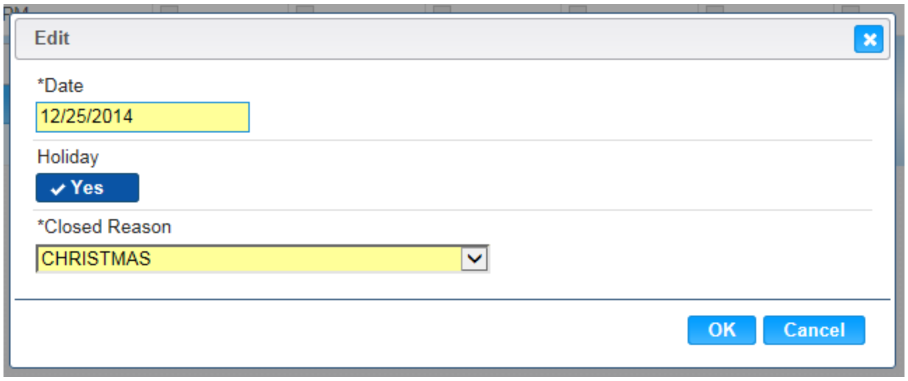


Fig 6.3) Clninic Default Settings – Add/Edit Closed Days

Fields:

<u>Default Hours Grid</u>:

- ***Clinics** – To select the clinic for which the default settings are being set or updated.*
- ***Open** – Identifies the time at which the clinic is open.*
- ***Close** – Identifies the time at which the clinic is closed.*
- ***Monday** – Identifies the open and close timings applies to every Monday.*
- ***Tuesday** – Identifies the open and close timings applies to every Tuesday.*
- ***Wednesday** – Identifies the open and close timings applies to every Wednesday.*
- ***Thursday** – Identifies the open and close timings applies to every Thursday.*
- ***Friday** – Identifies the open and close timings applies to every Friday.*
- ***Saturday** – Identifies the open and close timings applies to every Saturday.*
- ***Sunday** – Identifies the open and close timings applies to every Sunday.*

<u>Closed Days Grid</u>:

- ***Date** – To set the date in which the clinic is closed.*
- ***Holiday** – Identifies that the closed day is a holiday.*
- ***Closed Reason** – To set the reason the clinic is closed.*

Buttons:

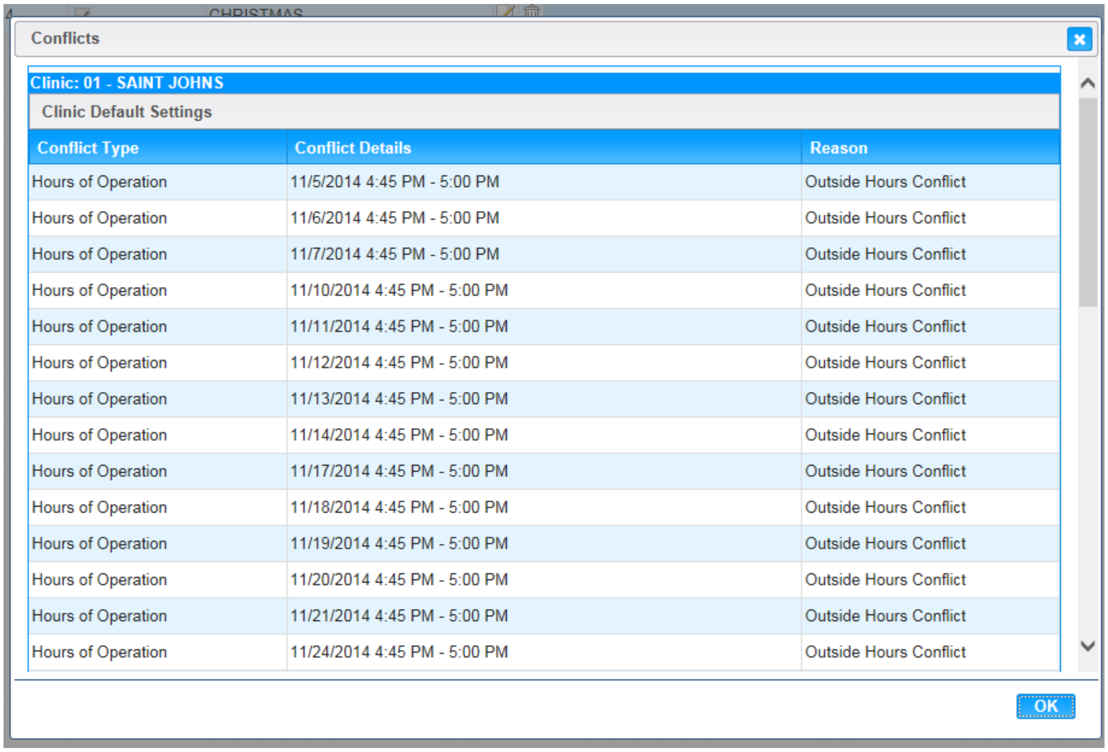
***Go** – To get the detailed settings for the selected clinic.*
***Add** – To add new item.*
***Save** – To commit the changes made though add or edit items.*
***OK** – Add or Edit Item updates the changes to the main page.*
***Cancel** – To cancel changes made though add or edit items*

Calculation(s):

The following Validations are implemented

- *Time validation like Clinic Open Time cannot be later than the Clinic Closed Time.*
- *At least one day has to be selected to be able to add or edit default hours row.*
- *Duplicate data for a day is not allowed for both default hours and closed days.*

Background Processes: None



Conflicts

Clinic: 01 - SAINT JOHNS

Clinic Default Settings

Conflict Type	Conflict Details	Reason
Hours of Operation	11/5/2014 4:45 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/6/2014 4:45 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/7/2014 4:45 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/10/2014 4:45 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/11/2014 4:45 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/12/2014 4:45 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/13/2014 4:45 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/14/2014 4:45 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/17/2014 4:45 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/18/2014 4:45 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/19/2014 4:45 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/20/2014 4:45 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/21/2014 4:45 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/24/2014 4:45 PM - 5:00 PM	Outside Hours Conflict

OK

Fig 6.4) Clinic Default Settings - Conflicts

Fields:

- ***Conflict Type*** *– The Type of data conflict stopping the user from saving the change.*
- ***Conflict Details*** *– Displays detailed information of the data conflict.*
- ***Reason*** *– Displayed the associated reason with the data conflict.*

Buttons:

- ***OK*** *– Closes the Conflict window.*

Calculation(s): None

Background Processes:

System checks appointment scheduler data for conflicts to maintain scheduler data integrity when adding/modifying default hours and closed days for a selected clinic on this screen.

Default Hours Conflicts: *While saving clinic default settings, system finds all columns timeslots which fall outside clinic default hours. If these timeslots are also not covered by clinic's hours of operation time then system shows these timeslots as conflicts, details include date and time of the timeslot.*

System checks if there are any timeslots defined based on clinic's default hours; if yes, displays conflicts message with date and time details if new changes to default hours makes the defined timeslots fall outside the default hours range. For example, timeslots are defined for a clinic from 01/01/2015 to 06/01/2015, 8AM – 5PM, Mon to Fri and user modified clinic default hours *so that there are no defined hours for Monday (Monday checkbox is unchecked), in this case, on default hours save, system displays conflicts for Monday dates between 01/01/2015 to 06/01/2015.*

Closed Days Conflicts: *For newly defined closed days, system checks the following data for potential conflicts.*

a. ***Timeslots:*** *If there are any time slots defined for newly defined holiday which are available, system will show these timeslots as conflicts. To resolve these conflicts, user can go to Calendar Setup and use block options to block columns availability. After blocking columns availability, user should be able to add a new clinic closed day.*

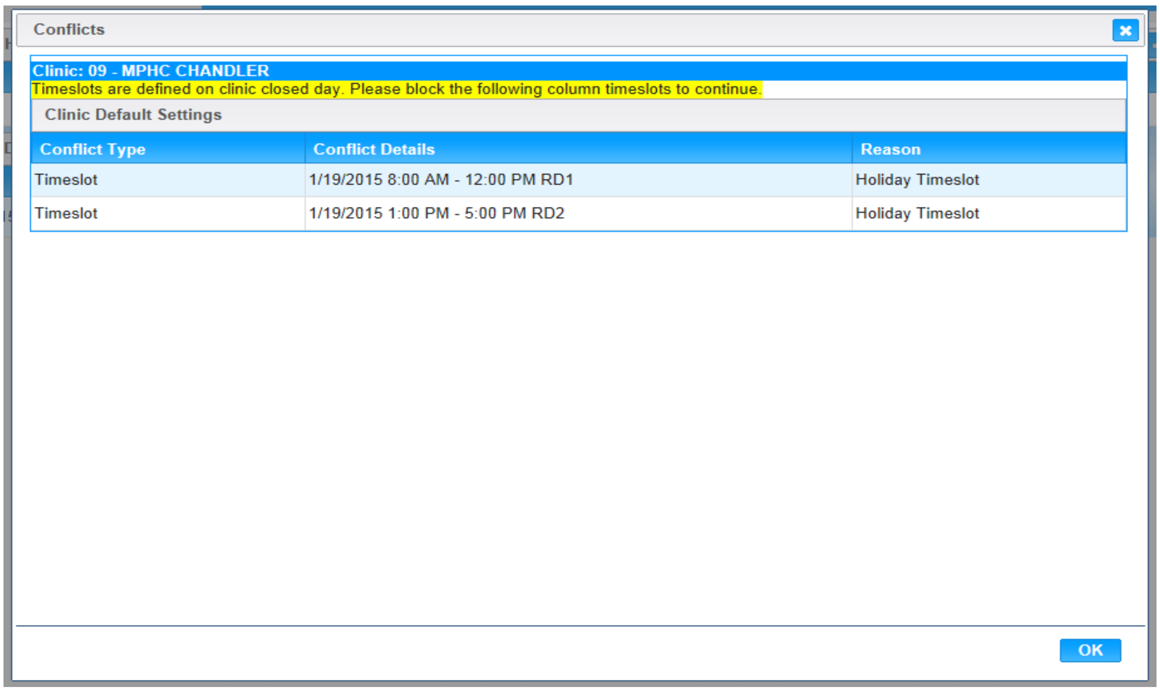


Fig 6.5) Clinic Default Settings - Conflicts

b. ***Appointments:*** *If there are any appointments scheduled for newly defined closed days, system will show these appointments as conflicts. Conflicts message will include various appointment details like Client ID, scheduled date and time, column name, and service name. User has the option to cancel or reschedule appointments to a different day by going to clinic's appointment sheet then define clinic new closed days.*

c. ***Group Nutrition Discussions:*** *All active Group Nutrition Discussions will be shown, if there are any, for newly defined clinic closed day(s). Conflict details include, group name, group scheduled date and time, number of attendees, and max limit. User can cancel group by going to clinic's appointment scheduler and cancelling the groups shown in the conflicts report then create closed days for a clinic.*

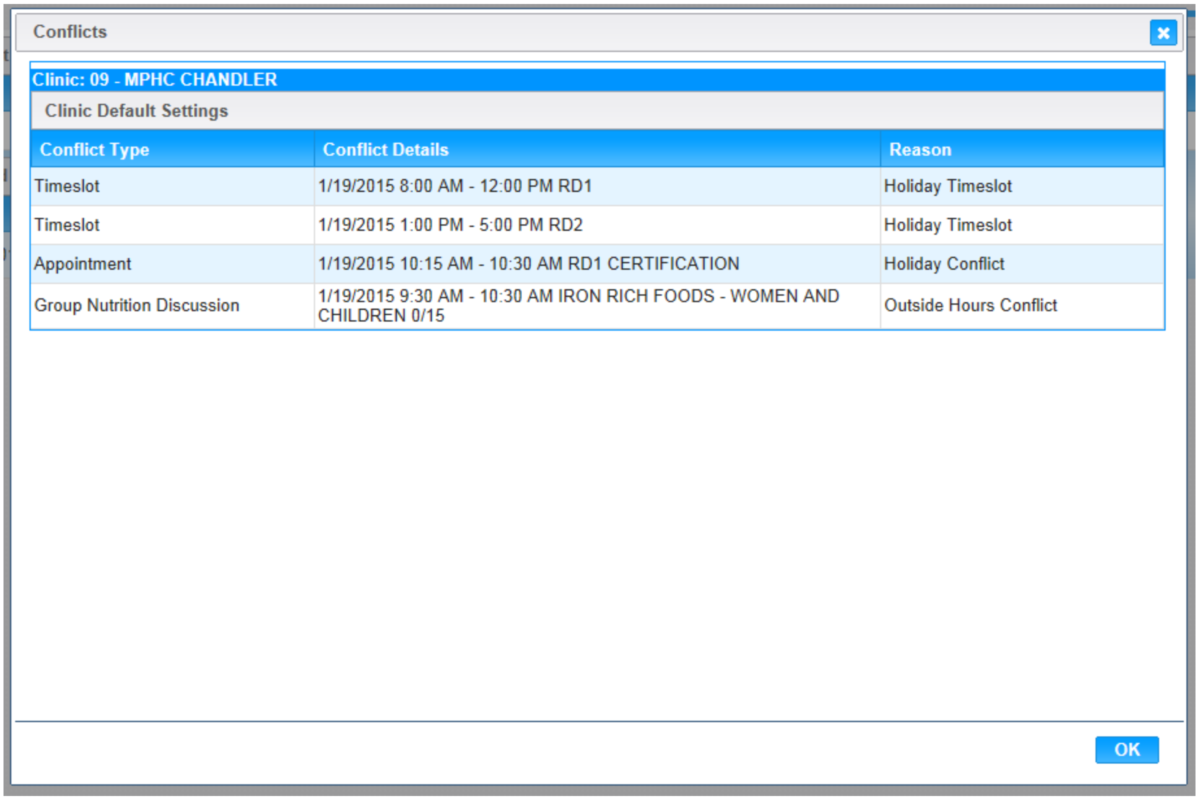


Fig 6.6) Clinic Default Settings - Conflicts

7 CLASS CATEGORIES

The Class Categories page allows users to manage the types of classes offered to each local agency. The list will be shared across every clinic in the local agency.

Navigation Path: Sys Admin | Appt Scheduler Base Tables | Class Categories

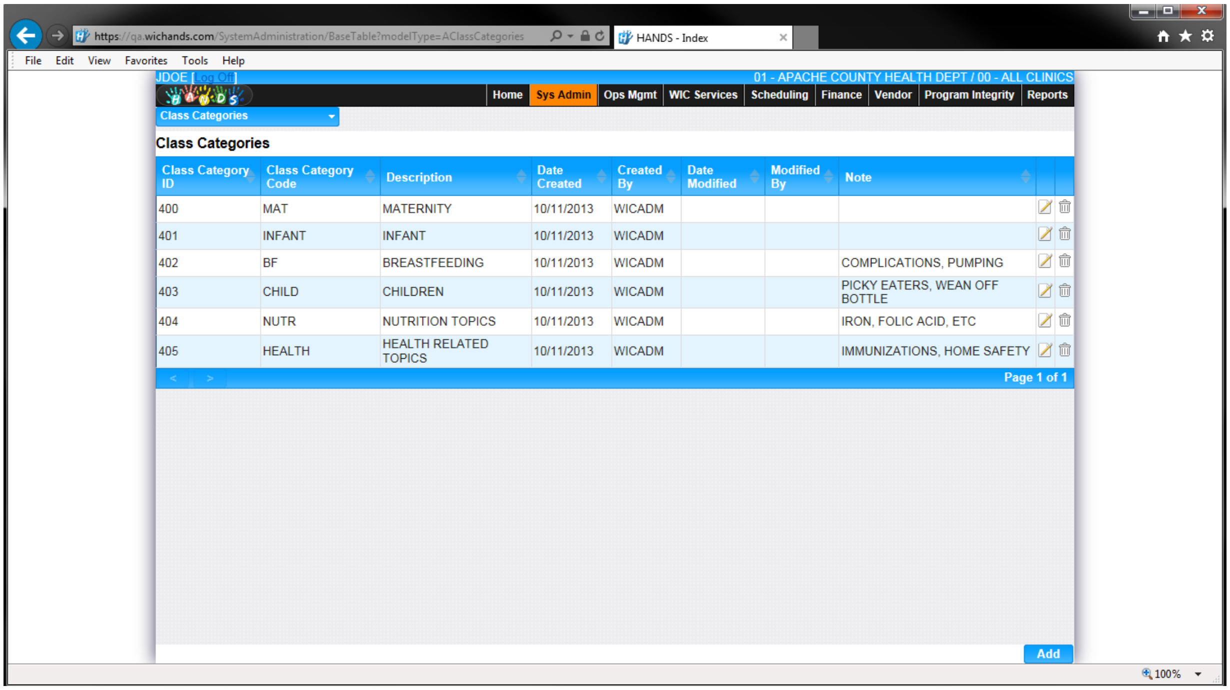


Fig 7.1) Class Categories – Main Screen

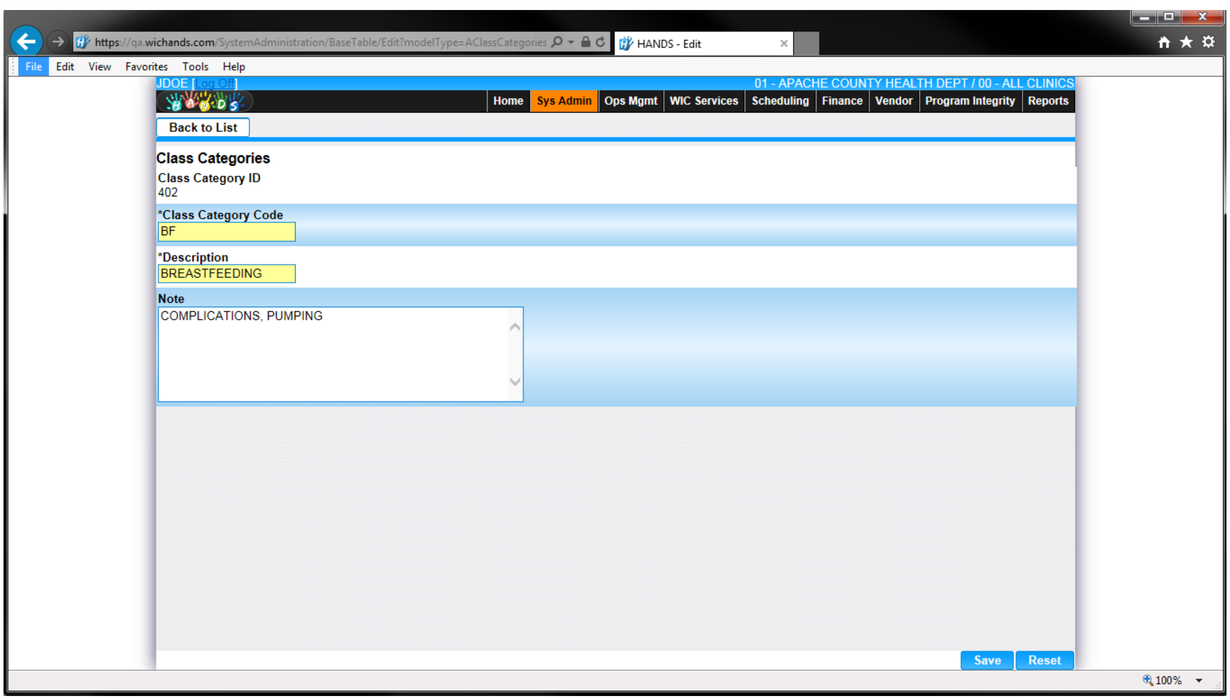


Fig 7.2) Class Categories – Add/Edit

Fields:

- ***Class Category ID** – Database unique Identifier for each Class Category.*
- ***Class Category Code** – Two-digit Code for the Class Category.*
- ***Description** – The name or description of the Class Category, which will be shown in any dropdown list for the user wherever the Class Categories is displayed.*
- ***Date Created** – Date in which the Class Category item is created.*
- ***Created By** – The user who created the Class Category.*
- ***Date Modified** – Most recent date in which the Class Category was updated.*
- ***Modified By** – The last user who updated the Class Category.*

Buttons:

***Add** – To add new Class Category.*
***Save** – To commit the changes made though add or edit Class Category details.*
***OK** – Add or Edit Item updates the changes to the main page.*
***Reset** – To cancel changes made though add or edit Class Category*

Calculation(s): None

Background Processes: None

8 MAINTAIN TEMPLATES SEARCH

Overview:

Templates are basic building blocks in setting up the scheduler. Building the scheduler in HANDS involves two steps. Step 1) Setting up templates and Step 2) Applying the templates to the clinics. Maintain Templates screen allows users to manage all the templates in the logged in clinic. Maintain Templates Search screen has the following search criteria: Template Type, Template Name, Clinic and Active Flag. There are three types of templates that will be maintained in this screen.

a) Appointment Time Slot
b) Group Nutrition Discussion
c) Hours of Operation

Selecting a Template Type at the top not only serves as a search filter but also as the selection for creating a new template as well.

Navigation Path: Scheduling | Maintain Templates

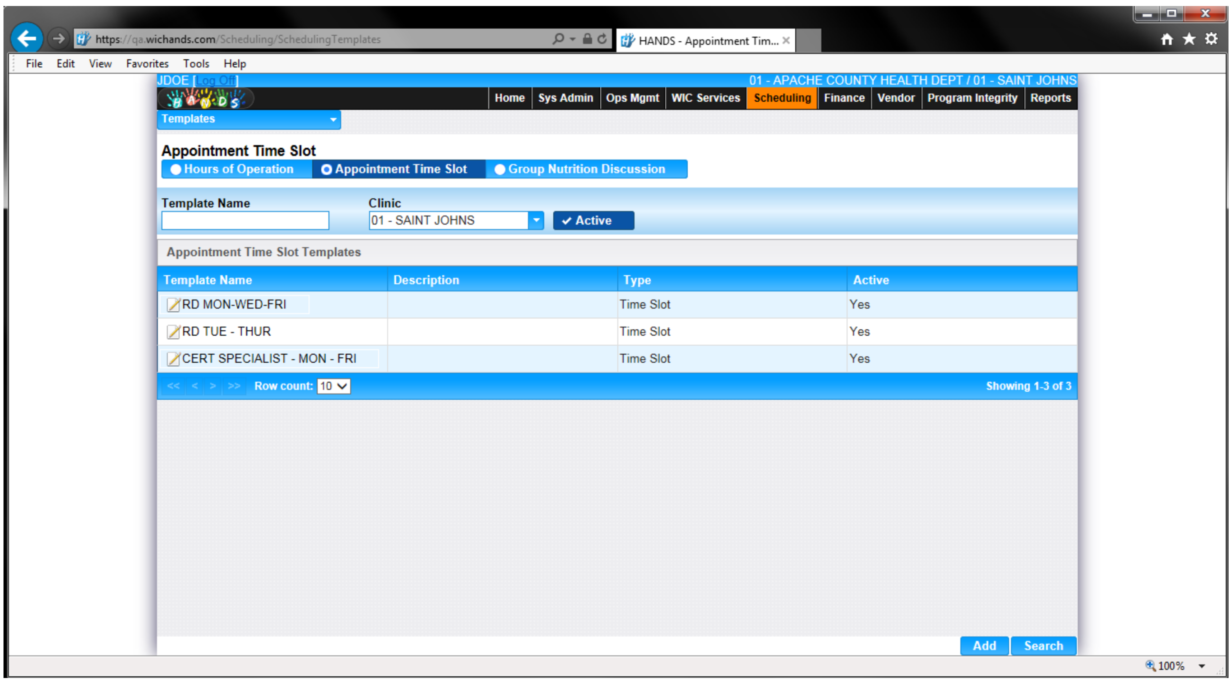


Fig 8.1) Maintian Templates – Main Screen

Fields:

- ***Template Type** Search Filter (Hours of Operation, Appointment Time Slot & Group Nutrition Discussion) – To filter the types of templates.*
- ***Template Name** Search Filter – To filter the templates based on their names.*
- ***Clinic** Search Filter – To filter the templates based on location of the clinic.*
- ***Active** Search Filter – To filter the active templates only.*

Buttons:

__Add__ – To add new Template.
__Search__ – To the search the existing templates based on the selected search criteria.

Calculation(s): By default, when the user navigates to this page, the system would select Appointment Time Slot as the option for the Template Type and Logged in Clinic for the Clinic option and Active checkbox would be checked. When the user is logged in sate login (00/00), the add template will not be allowed.

Background Processes: None

9 APPOINTMENT TIME SLOT TEMPLATE

The Appointment Time Slot Template page allows users to create and modify appointment time slots for each local agency.

Navigation Path: Scheduling | Maintain Templates | Add

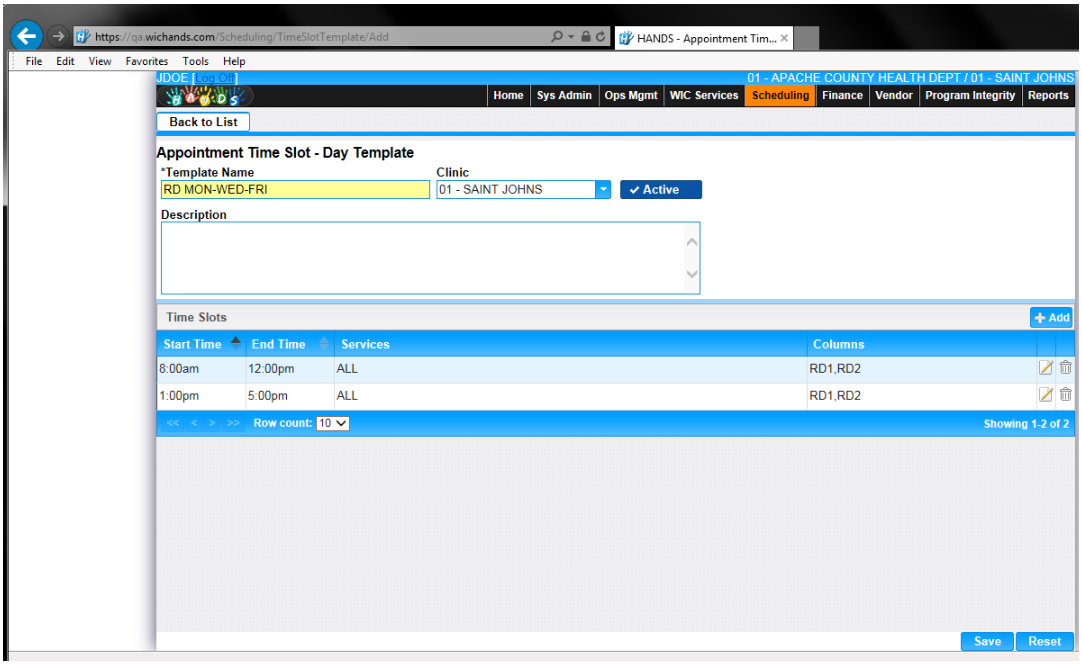


Fig 9.1) Main Templates– Add/ Edit Appointment Time Slot

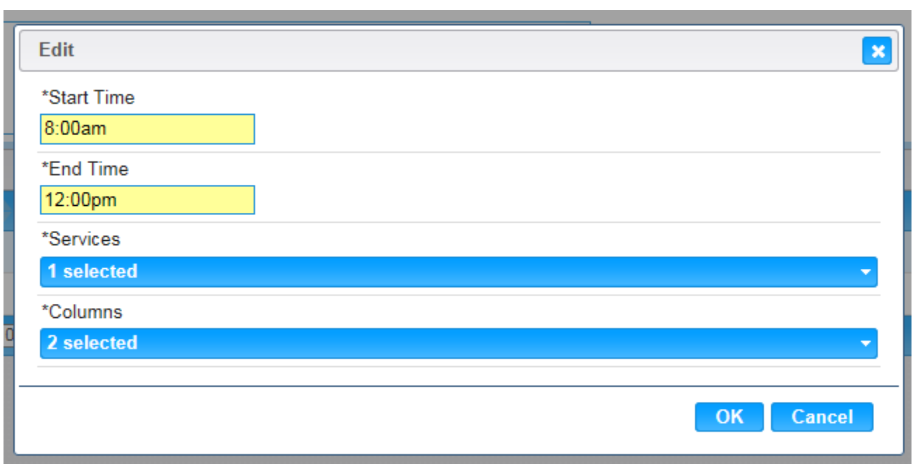


Fig 9.2) Appointment Time Slot – Add/Edit Timeslot

Fields:

- ***Template Name*** *– Identifies the name of the template.*
- ***Clinic*** *– Identifies the location in which the template is being created.*
- ***Active*** *– Identifies whether the template is active or not.*

Time Slots:

- ***Start Time** – Identifies the start time of the time slot.*
- ***End Time** – Identifies the end time of the time slot.*
- ***Services** – Identifies the list of services offered within the time slot.*
- ***Columns** – Identifies list of the provider column names offering the services in the time slot.*

Buttons:

***Save** – To commit the changes.*
***Save As** – To create a copy of the original template in a different name with the changes.*
***Reset** – To cancel changes made and reloads the page.*
***OK** – Updates the changes made in Add or Edit time slots to the main page.*
***Cancel** – To cancel changes made in Add or Edit time slots model window.*

Calculation(s):

- *System will validate to prevent the user from accidently creating conflicting time slots for a column.*

- *One of the services is flagged as All Service Flag by default for every time slot for which that service will be selected, in the event the column performs specific services the user can then de-select the all service and select the applicable services for one or more columns.*

- *"Save As" can be used to quickly modify an existing template without recreating the template. "Save As" will only be shown in an existing template.*

- *When Save As is pressed, user should enter a new name; otherwise, the system will append Copy of with the existing name.*

Background Processes: None

10 HOURS OF OPERATION TEMPLATE

Overview:

Clinic Hours of Operation template will only be used to override any default settings. Time slots can't be created without defining Clinic operating hours. If a Clinic normally operates on Monday to Friday from 8 AM to 5 PM. The Clinic Default Settings screen will be used to setup that information but for one day only if the clinic is operating from 7AM to 6PM. Those are the hours for which the Hours of Operation template can be used.

Navigation Path: Scheduling | Maintain Templates | Add

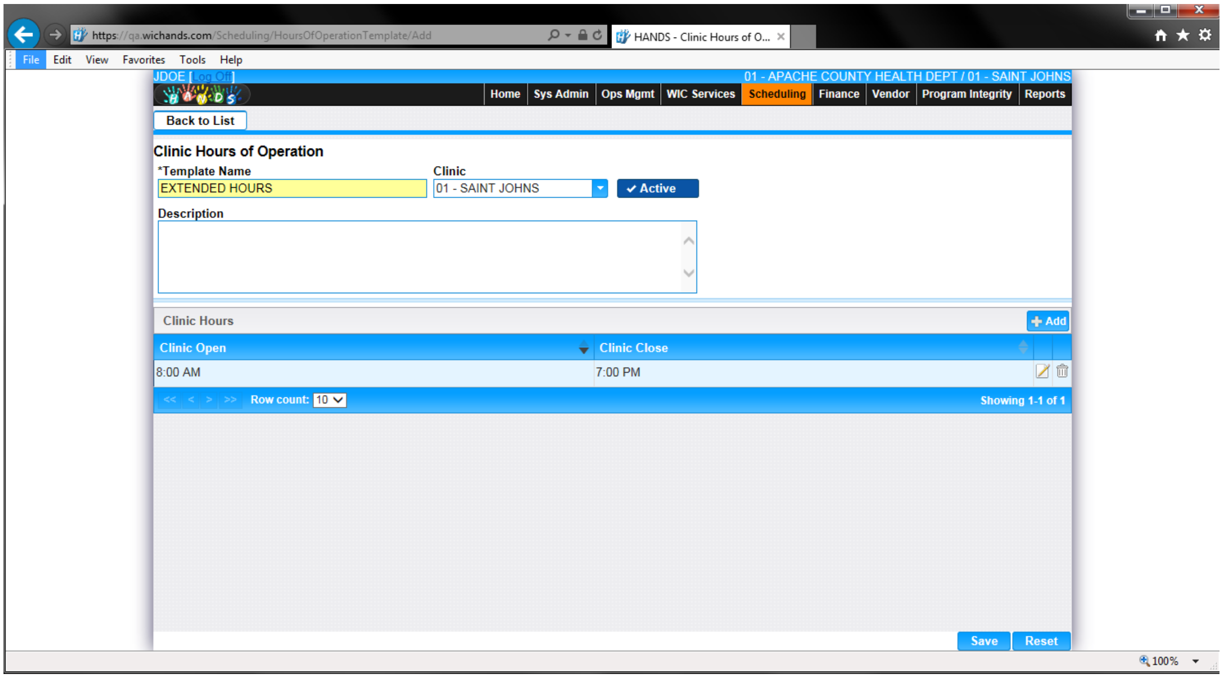


Fig 10.1) Maintain Templates – Add/Edit Hours of Operation Template

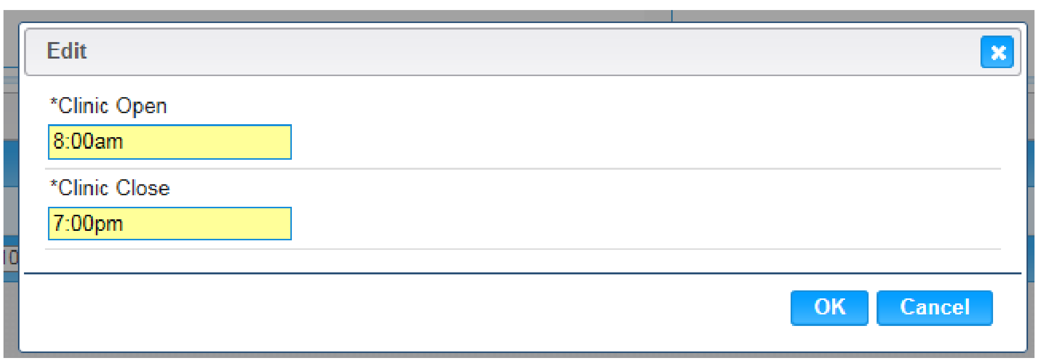


Fig 10.2) Hours of Operation Template – Add/Edit Timeslot.

Fields:

- ***Template Name* – *Identifies the name of the template.***
- ***Clinic* – *Identifies the location in which the template is being created.***
- ***Active* – *Identifies whether the template is active or not.***

Clinic Hours:

- ***Clinic Open* – *Identifies when the clinic will be open.***
- ***Clinic Close* – *Identifies when the clinic will be closed.***

Buttons:

Save – *To commit the changes.*
Save As – *To create a copy of the original template in a different name with the changes.*
Reset – *To cancel changes made and reloads the page.*
OK – *Updates the changes made in Add or Edit clinic hours to the main page.*
Cancel – *To cancel changes made in Add or Edit clinic hours model window.*

Calculation(s):

- *System will validate to prevent the user from accidently creating conflicting clinic hours.*
- *"Save As" can be used to quickly modify an existing template without recreating the template. "Save As" will only be shown in an existing template.*
- *When Save As is pressed, user should enter a new name otherwise the system will append Copy of with the existing name.*

Background Processes: None

11 GROUP NUTRITION DISCUSSION CLASS TEMPLATE

The Group Nutrition Discussion Class Template page allows users to manage the template of classes provided at each local agency. The list will be shared across every clinic in the local agency.

Navigation Path: Scheduling | Maintain Templates | Add

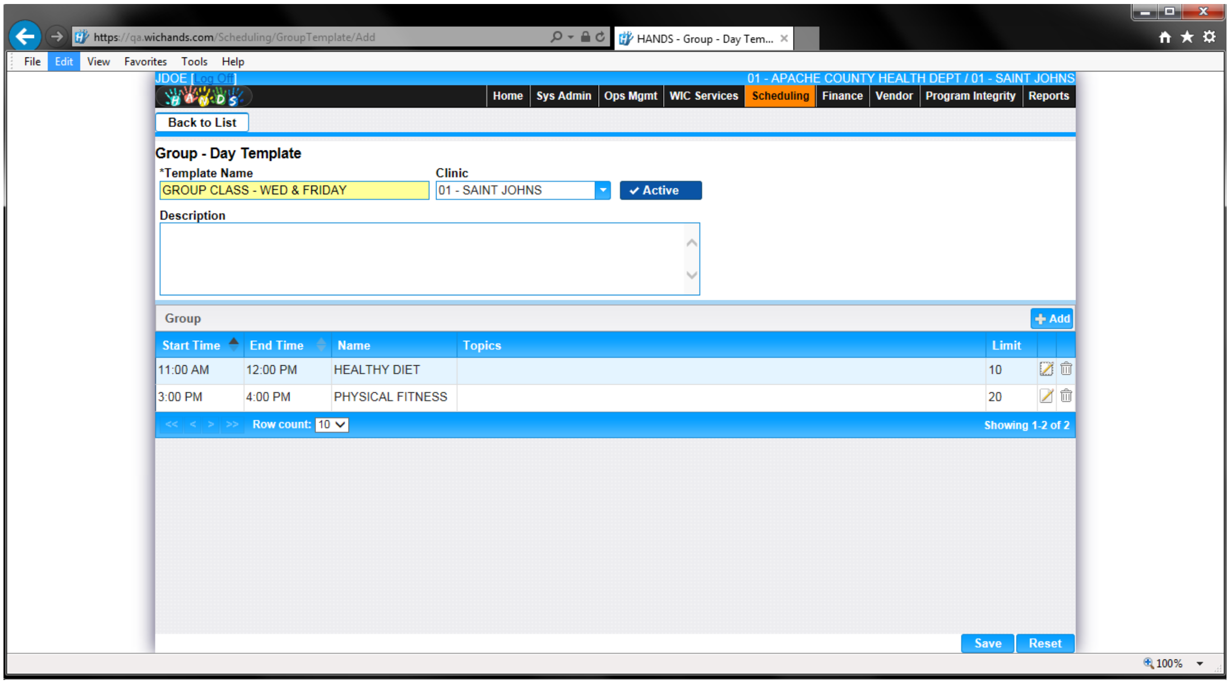


Fig 11.1) Minatian Templates – Add/Edit Group Nutrition Discussion Template

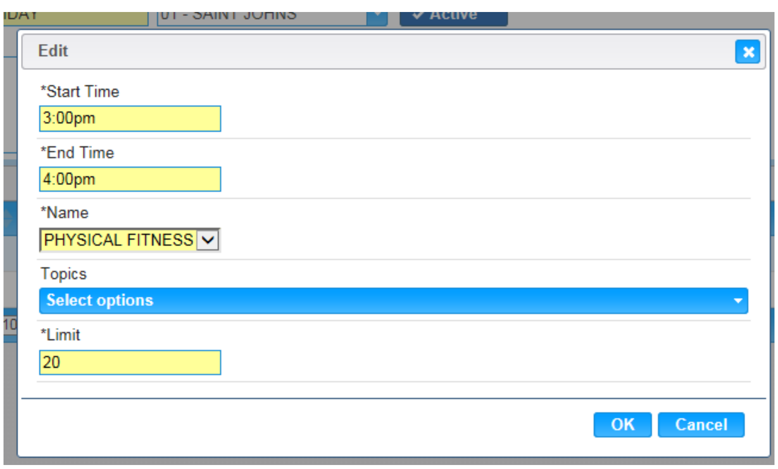


Fig 11.2) Group Nutrition Discsion Template – Add/Edit Group

Fields:

- ***Template Name** – Identifies the name of the template.*
- ***Clinic** – Identifies the location in which the template is being created.*
- ***Active** – Identifies whether the template is active or not.*

Group:

- ***Start Time –*** *Identifies the start time of the Group Class.*
- ***End Time –*** *Identifies the end time of the Group Class.*
- ***Name –*** *Identifies the Name of the Group Class that will be displayed in the Scheduler.*
- ***Topics –*** *Identifies list of the default topics that will be discussed in the Group Class.*

Buttons:

- ***Save –*** *To commit the changes.*
- ***Save As –*** *To create a copy of the original template in a different name with the changes.*
- ***Reset –*** *To cancel changes made and reloads the page.*
- ***OK –*** *Updates the changes made in Add or Edit Group details to the main page.*
- ***Cancel –*** *To cancel changes made in Add or Edit Group details model window.*

Calculation(s):

- *System will validate to prevent the user from accidently creating conflicting Groups.*

- *"Save As" can be used to quickly modify an existing template without recreating the template. "Save As" will only be shown in an existing template.*

- *When Save As is pressed, user should enter a new name otherwise the system will append Copy of with the existing name.*

Background Processes: None

12 CLINIC SCHEDULER SETUP

Overview:

Users can use this screen to configure clinic(s) appointment scheduler and has the flexibility to build scheduler from scratch or modify the existing schedule of a clinic. User can also change the column(s) availability by blocking them by selecting one column or more under block options section of the page. During this setup, system performs a conflicts check so that users will have a valid appointment scheduler to work with and can use it to seamlessly schedule appointments or perform other scheduling services. During the scheduler setup, user can select a template or combination of templates, like, Hours of Operation template and Appointment timeslot template and system apply them to the scheduler in proper manner.

Navigation Path: Scheduling | Maintain Templates | Clinic Scheduler Setup

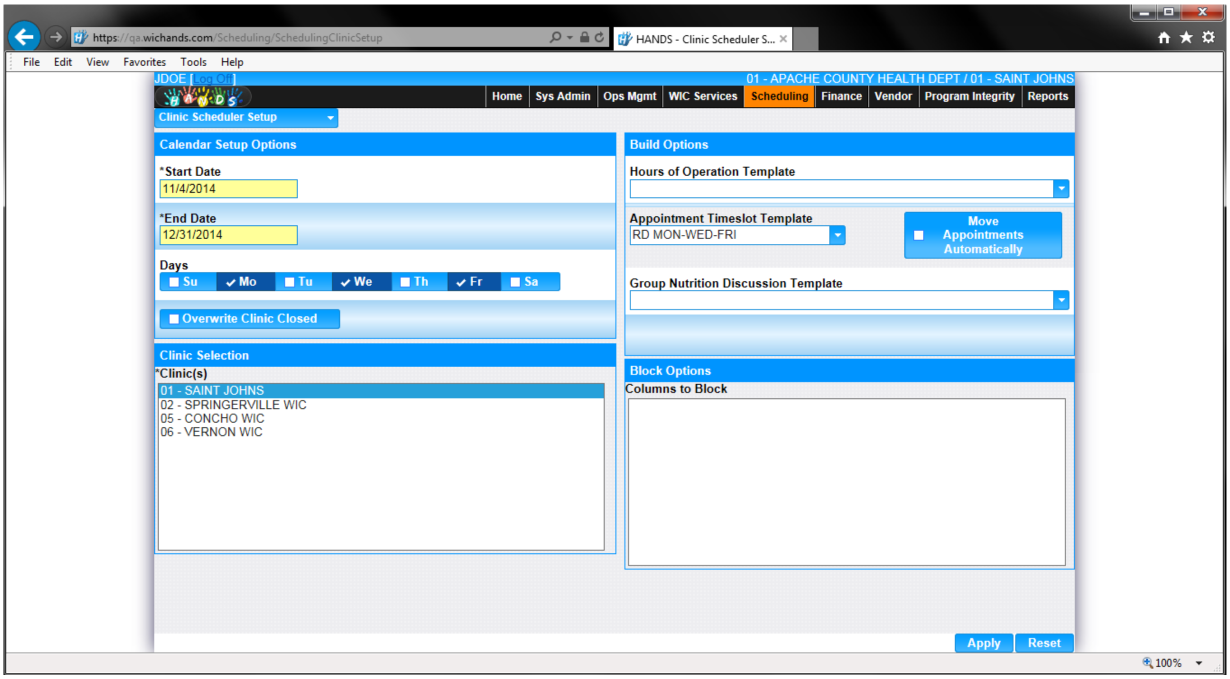


Fig 10.2) Hours of Operation Template – Add/Edit Timeslot

Fields:

<u>*Calendar Setup Options:*</u>

- ***Start Date*** *– Identifies starting date of calendar date range for data that is being updated.*
- ***End Date*** *– Identifies end date of calendar date range for which data that is being updated.*
- ***Days*** *– Identifies whether the template is being is applied for only the selected days of the week. If only Monday checkbox is set, then the data will be updated only every Monday within the selected date range.*

- ***Override Clinic Closed** – If this flag is NOT set, then any dates that are set as Closed Days in Clinic Default Settings will be skipped over.*

Clinic Selection:

***Clinic Selection** – Identifies list of clinics that are being setup.*

Build Options:

- ***Hours of Operation Template** – Identifies the Hours of Operation template that is being used to setup the scheduler.*
- ***Appointment Timeslot Template** – Identifies the Appointment Timeslot template that is being used to set up the scheduler.*
  - ***Move Appointments Automatically** – Identifies to reschedule appointments to a different column on the same day, time and service.*
- ***Group Nutrition Discussion Template** – Identifies the Group Nutrition Discussion template that is being used to set up.*

Block Options:

- ***Columns to Block** – Identifies the list of provider columns in the selected clinic to be blocked for the selected dates.*

Buttons:

***Save** – To commit the changes.*
***Reset** – To cancel changes made and reloads the page.*

Calculation(s):

- *Start Date will be defaulted to Today's date.*
- *Clinic will be defaulted to logged in Clinic.*
- *Monday to Friday will be selected by default.*
- *Start Date, End Date, Days, Clinic in Calendar Setup Options are required.*
- *The pre-defined templates will be associated to one or more clinics and to a date range using this screen.*
- *This screen will be used to create or update appointment time slots or Groups.*
- *Block Options will always be for a specific clinic not for more than one clinic.*
- *If there is a holiday defined but only one clinic is working on that date for some reason, then the Overwrite Clinic Closed will be selected to achieve this functionality.*

- *User can select just Appointment Timeslot Template or all three, but at least one of the template types needs to be selected for building.*

Background Processes:

During the scheduler setup, the system checks to see if newly selected build options or block options are compatible with existing scheduler data. If data is not compatible, users will be presented with conflicts which include details about incompatible scheduler data.

These will include the type of conflict which is preventing the user from applying the templates, further details about the event (Appointment or Groups) will be shown in the details section, and also the reason why the conflict is happening. Since there are three types of templates that can be applied at once, the conflict details will show detailed template information which helps user to modify the template and setup scheduler successfully. When there is a conflict regarding hours of operation, while both the time slot template and hours of operation template are selected, the conflict will not appear if it is successfully fixing the conflict.

Hours of Operation Template Conflicts: Hours of Operation can be used to set the clinic operational hours or to update the existing clinic hours. During this process, the system checks if the new hours are valid with existing scheduler data or not. If a selected hour of operation template is defined such that clinic is open from 8am to 3pm on Fridays, applying this template to a scheduler which was defined to open from 7am to 3pm makes the system check if there are any appointments or Nutrition Discussion groups scheduled from 7am to 8am on Fridays. If there are any events defined during this time, the system shows these as conflicts so that user can take appropriate action.

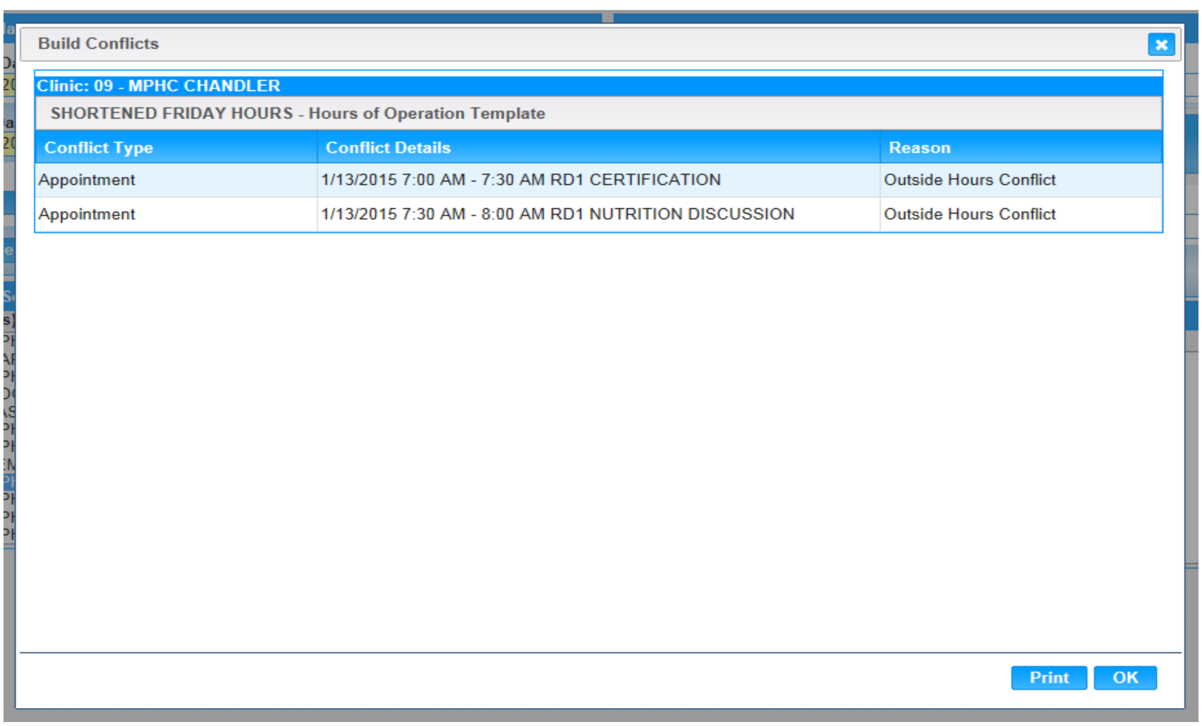
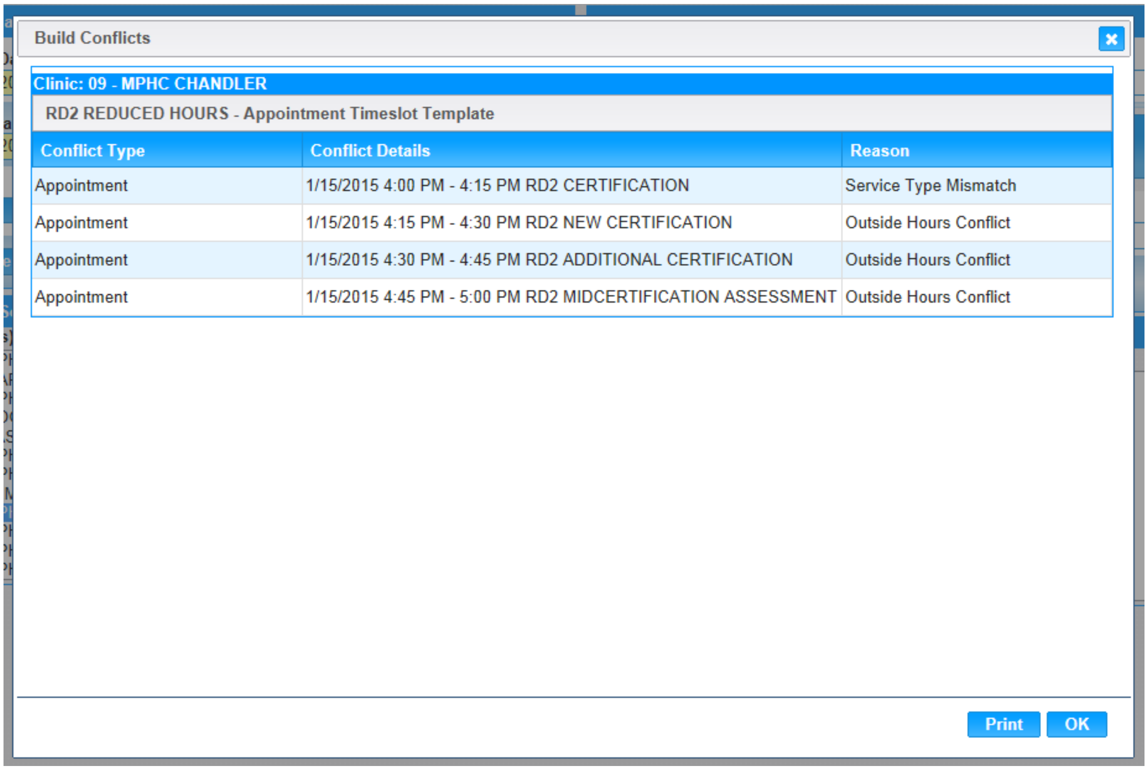


Fig 10.3) Hours of Operation Template – Conflicts

In Figure 10.3 above, template for Column-A with hours being 8AM to 3PM and performs only Certification service appointments, the system checks for any scheduled appointments for this column from 3PM to 4PM on Mondays for selected date range and shows to the user if there are any in the form of conflicts. The following screen shot shows conflicts for this scenario.


Build Conflicts

Clinic: 09 - MPHC CHANDLER

RD2 REDUCED HOURS - Appointment Timeslot Template

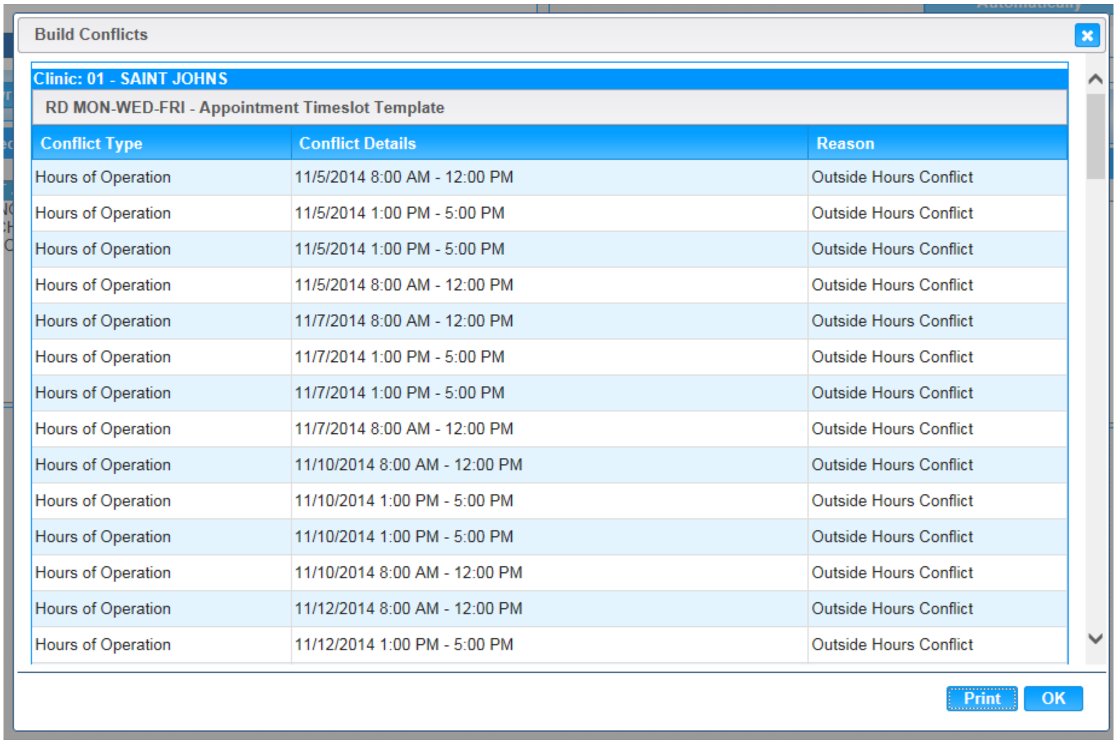
Conflict Type	Conflict Details	Reason
Appointment	1/15/2015 4:00 PM - 4:15 PM RD2 CERTIFICATION	Service Type Mismatch
Appointment	1/15/2015 4:15 PM - 4:30 PM RD2 NEW CERTIFICATION	Outside Hours Conflict
Appointment	1/15/2015 4:30 PM - 4:45 PM RD2 ADDITIONAL CERTIFICATION	Outside Hours Conflict
Appointment	1/15/2015 4:45 PM - 5:00 PM RD2 MIDCERTIFICATION ASSESSMENT	Outside Hours Conflict

Print OK

Fig 10.4) Hours of Operation Template – Conflicts

The system also checks for conflicts for removed sercices for a column. Lets consider a scenario where certification service is removed from list of services performed by Column-A. While applying this new template, system checks if there are any appointments of service type ‘Certification’ scheduled for Column-A, if yes, system shows theese appointments as conflicts.

Following screeen shot shows a scenario where appointment timeslot template is defined such that it falls outside clinic hours of operation. When applied, system checks the template hours with clinc hours of operation, if template hours go beyond clinic hours, system shows conflicts which include outside hours details.



Build Conflicts

Clinic: 01 - SAINT JOHNS

RD MON-WED-FRI - Appointment Timeslot Template

Conflict Type	Conflict Details	Reason
Hours of Operation	11/5/2014 8:00 AM - 12:00 PM	Outside Hours Conflict
Hours of Operation	11/5/2014 1:00 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/5/2014 1:00 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/5/2014 8:00 AM - 12:00 PM	Outside Hours Conflict
Hours of Operation	11/7/2014 8:00 AM - 12:00 PM	Outside Hours Conflict
Hours of Operation	11/7/2014 1:00 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/7/2014 1:00 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/7/2014 8:00 AM - 12:00 PM	Outside Hours Conflict
Hours of Operation	11/10/2014 8:00 AM - 12:00 PM	Outside Hours Conflict
Hours of Operation	11/10/2014 1:00 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/10/2014 1:00 PM - 5:00 PM	Outside Hours Conflict
Hours of Operation	11/10/2014 8:00 AM - 12:00 PM	Outside Hours Conflict
Hours of Operation	11/12/2014 8:00 AM - 12:00 PM	Outside Hours Conflict
Hours of Operation	11/12/2014 1:00 PM - 5:00 PM	Outside Hours Conflict

Print OK

Fig 10.5) Hours of Operation Template – Conflicts

Group Nutrition Discussion Template Conflicts: System checks for two types of data mismatch while applying new group nutrition discussion template. First, new template hours are in sync with the clinic's hours of operation. If group nutrition discussion class falls outside clinic's hours, system catches this and shows conflicts to the user with these details.

Second, whenever user applies a new group nutrition discussion template with a group name, system checks if there is any existing class with the same group name with clients, if yes, system shows conflicts about existing group nutrition discussion class. System expects a one group nutrition discussion class with one group name per day.

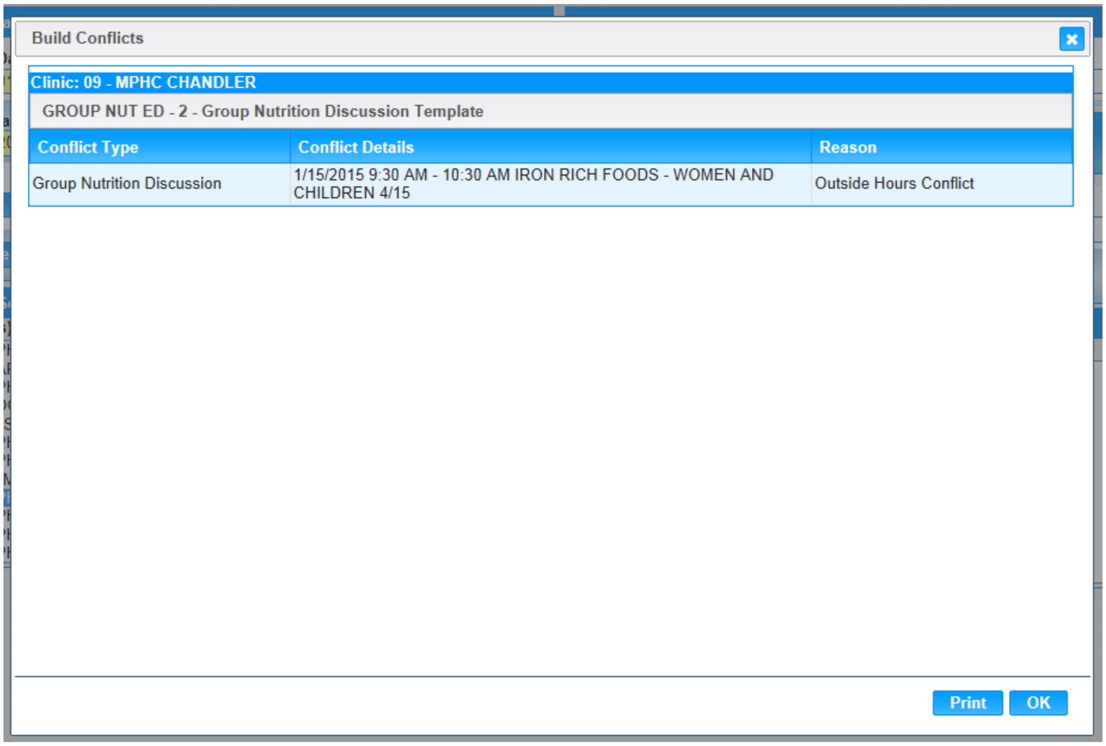


Fig 10.6) Hours of Operation Template – Conflicts

Fields:

- ***Conflict Type*** *– The Type of data conflict stopping the user from saving the change.*
- ***Conflict Details*** *– Displays detailed information of the data conflict.*
- ***Reason*** *– Displayed the associated reason with the data conflict.*

Buttons:

- ***OK*** *– Closes the Conflict window.*
- ***Print*** *– To print the conflicts.*

Moving Appointments:

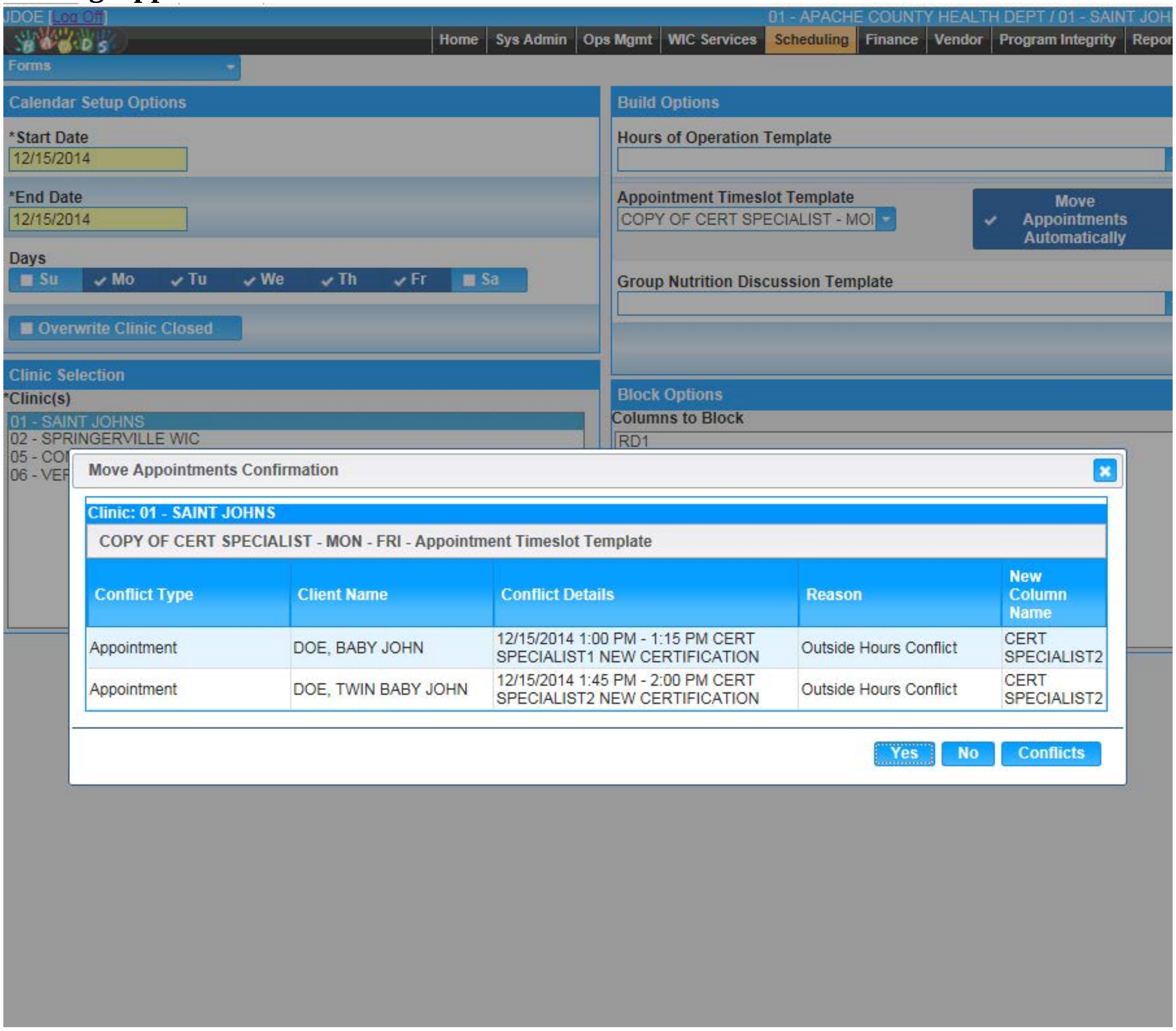


Fig 10.7) Moving Appointments

When Choosing Move Appointment Automatically, if there are any conflicting appointments scheduled (for example, any appointment scheduled for a time in which the columns are not available). In detail, when there is already an appointment scheduled in a time for the column, but the new template being applied does not have the column available for those times, the system will then show a confirmation page with details of the conflicting appointment and alternative column in which each conflictng appointment will be scheduled. If the system cannot find any alternative column, it will be blank. There will be a couple of options available. Option one will reschedule the conflicting appointments to new columns and also enable the selected template. The second option will not reschedule the appointments but will only apply the template. The third option will return the user to the Conflicts window, and the user will then be able to print and manually reschedule the appointments; the user may then try to apply the template again at that time. If there are no conflicting appointments, the new template will be applied successfully.

Blocking Column(s): User can use block options to block one or more column's availability. When block options are selected, system checks if there are any appointments scheduled for selected column(s) and shows appointment details, if there are any, which are getting affected by blocking action.

Following screen shot shows a scenario where user is trying to block a column (RD2) where this column has four scheduled appointments on 01/15/2015 from 4PM to 5PM. When user selects this column to block, system performs a conflict check and shows the conflict details, in this case shows details about four appointments. User can click 'Continue Block' button to go ahead with blocking operation. In this case, system igonres the conflicts and blocks the selected column(s).

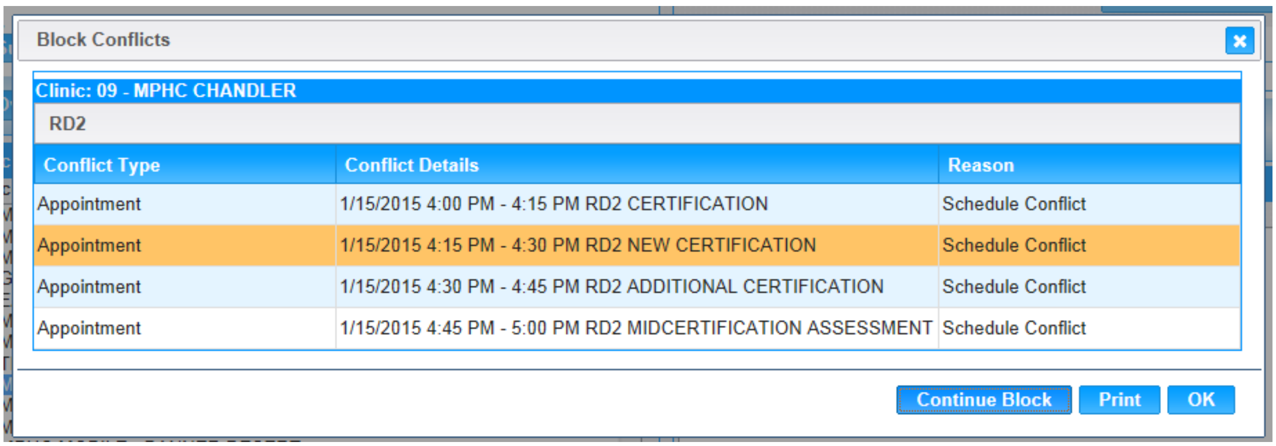


Fig 10.8) Scheduling Conflicts

Buttons:

- ***OK** – Closes the Conflict window.*
- ***Print –** To print the conflicts.*
- ***Continue Block –*** When clicked, blocks the column even conflicts exists.

13 PRECERTIFICATION – FAMILY

The Precertification - Family page allows users to enter in family information for the processing of precertification. This occurs at the clinic level.

Navigation Path: Scheduling | Precertification

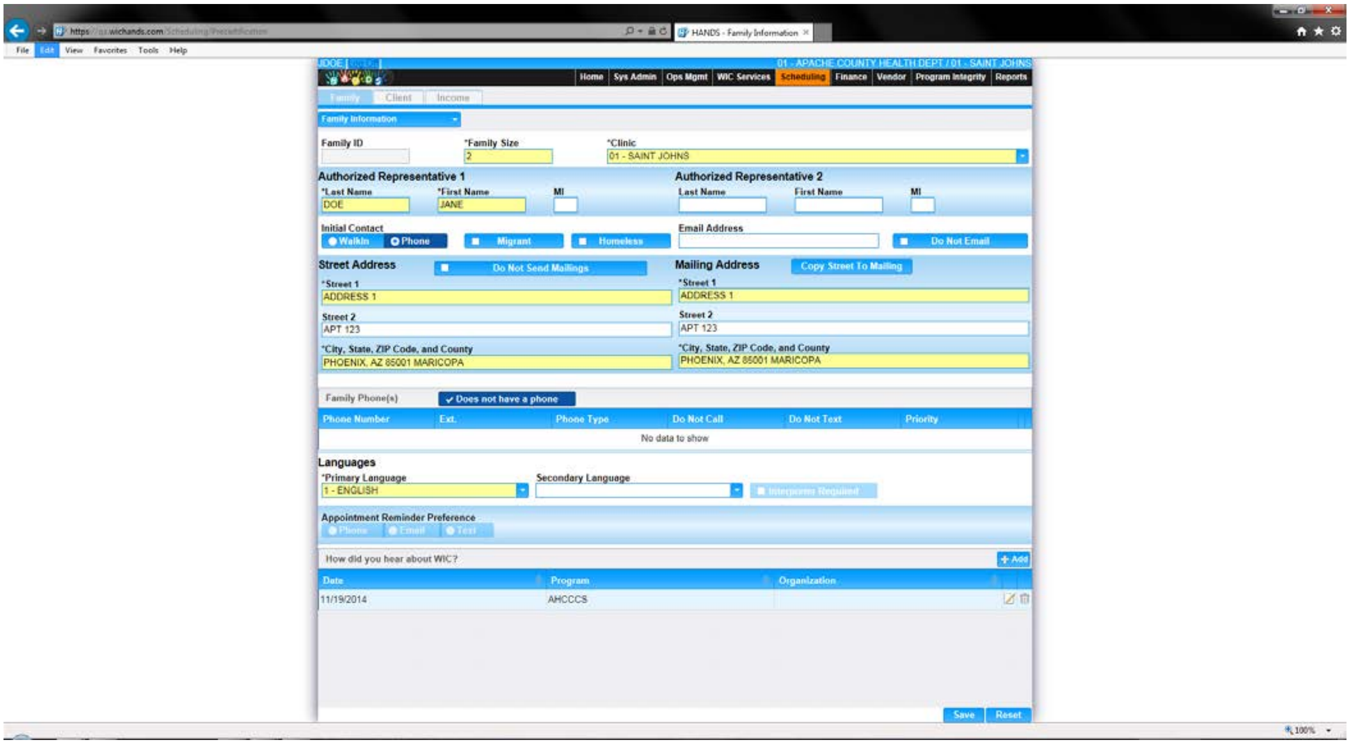


Fig 11.1) Precertification - Family

Fields:

- **Family Size –** To set the number of members in the household.
- **Clinic –** To set the Clinic that the Family is getting pre-registered in. This field is mandatory.
- **Authorized Representative 1:**
  - **Last Name –** To set the last name of the first authorized representative. This field is mandatory.
  - **First Name –** To set the first name of the first authorized representative. This field is mandatory.
  - **MI –** To set the middle initial of the first authorized representative. This field is optional.
- **Authorized Representative 2:**
  - **Last Name –** To set the last name of the second authorized representative. This field is mandatory if data is entered into any of the authorized representative two fields. Otherwise, this field is optional.
  - **First Name –** To set the first name of the second authorized representative. This field is optional.

    - **MI –** To set the middle initial of the second authorized representative. This field is optional.
- **Initial Contact:**
    - **Walk in/Phone–** To set how the client initially contacted the click to receive the service.
- **Migrant –** To set that the family is an immigrant family. This field is optional.
- **Homeless –** To set that the family is homeless. This field is optional.
- **Email Address –** To set the email address of the first authorized representative. This field is optional.
- **Do Not Email –** A checkbox to determine if the Family wishes to receive emails. If the checkbox is checked then the Family does not wish to receive any emails. If the checkbox is unchecked then the Family agrees to receive emails.
- **Do Not Send Mailings –** A checkbox to determine if the Family wishes to receive mailings to the first addresses listed. If the checkbox is checked then the Family does not wish to receive any mailings. If the checkbox is unchecked then the Family agrees to receive mailings.
- **Street Address:**
    - **Street 1 –** The first street address of the Family. This field is mandatory.
    - **Street 2 –** The second street address of the Family. This field is optional.
    - **City, State, ZIP Code, and County –** The City, State, ZIP Code, and County combination for the first street address of the Family. This field is mandatory and selected from a drop down list. Any portion of this field (i.e. State or ZIP Code) can be manually entered. Possible field values will be available for selection within the drop down as characters are entered.
- **Mailing Address:**
    - **Street 1 –** The first mailing address of the Family. This field is mandatory.
    - **Street 2 –** The second mailing address of the Family. This field is mandatory.
    - **City, State, ZIP Code, and County –** The City, State, ZIP Code, and County combination for the first mailing address of the Family. This field is mandatory and selected from a drop down list. Any portion of this field (i.e. State or ZIP Code) can be manually entered. Possible field values will be available for selection within the drop down as characters are entered.
- **Family Phone(s) Grid:** A grid used to display all phone numbers listed for the Family.
    - **Phone Number –** The ten digit number listed. This field is display only.
    - **Ext. –** The extension of the number listed. This field is display only.
    - **Phone Type –** The type of the number listed. This field is display only.
    - **Do Not Call –** A checkbox to determine if user is allowed to call the phone number listed. This field is display only. If the checkbox is checked then the user cannot call the Family using this number. If the checkbox is unchecked then the user is allowed to call the Family using this number.
    - **Do Not Text –** A checkbox to determine if user is allowed to text the phone number listed. This field is display only. If the checkbox is checked then the user cannot text the Family using this number. If the checkbox is unchecked then the user is allowed to text the Family using this number.

    - **Priority –** The priority of the phone number listed. This field is display only. At least one phone number must have the priority of primary.
- **Languages:**
    - **Primary Language –** The primary language of the first authorized representative. This field is mandatory, will default to English, and selected from a drop down list.
    - **Secondary Language –** The secondary language of the first authorized representative. This field is optional and selected from a drop down list.

    - **Interpreter Required –** A checkbox to determine if the Family requires an interpreter. If the checkbox is checked then an interpreter is required for the Family. If the checkbox is unchecked then the Family does not require an interpreter. The checkbox will only be enabled for selection if primary language is anything but English. This field is optional.

- **Appointment Reminder Preference:**
    - **Phone/Email/Text –** To set how the client wished to be reminded about their appointment.

- **How did you hear about WIC? Grid:** A grid to display all programs that have referred the Family to WIC.
    - **Date –** The date in which the referral record was entered. This field is display only.
    - **Program –** The program that referred the Family to WIC. This field is display only.
    - **Organization –** The organization that is affiliated with the program that referred the Family to WIC. This field is display only.

Buttons:

- **Copy Street To Mailing –** Click the copy street to mailing button to overwrite entered data in the mailing address fields with the exact data entered in the street address fields. After the button is clicked additional changes made to the street address fields will not be reflected in the mailing address fields unless the button is clicked again.
- **Family Phone(s) Grid:**
    - **Does not have a phone –** A checkbox to determine if the Family does not have a phone. If the checkbox is checked the Family does not have a phone and the add button will be greyed out. The checking of this checkbox will allow the user to save the page without entering a phone number with a primary priority. If the checkbox is unchecked then a phone number with a primary priority is mandatory.
    - **Add –** Click the Add button to display the add modal and add records to the Family Phones(s) grid.

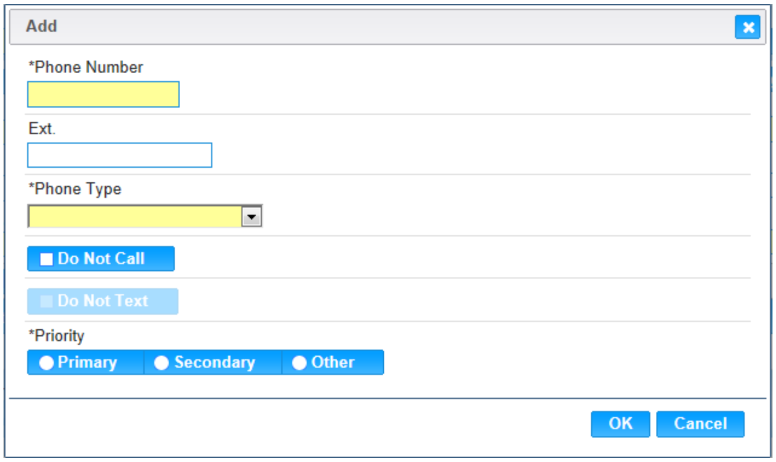


Figure 11.2: Add a Phone Modal

Fields (Add a Phone Modal):

- **Phone Number –** The ten digit number being entered. This field is mandatory.
- **Ext. –** The extension of the number being entered. This field is optional.
- **Phone Type –** The type of number being entered. This field is mandatory and selected from a drop down list. For more information, see the Phone Types base table section of this document.
- **Do Not Call –** A checkbox to determine if user is allowed to call the phone number listed. This field is optional. If the checkbox is checked then the user cannot call the Family using this number. If the checkbox is unchecked then the user is allowed to call the Family using this number.
- **Do Not Text –** A checkbox to determine if user is allowed to text the phone number listed. This field is optional. If the checkbox is checked then the user cannot text the Family using this number. If the checkbox is unchecked then the user is allowed to text the Family using this number. This field will be greyed out unless the phone type being entered is cell phone.
- **Priority –** Selection options (Primary, Secondary, and Other) to determine the priority of the number being entered. This field is mandatory. One number listed for the Family must have the priority of primary. After the button is clicked additional changes made to the street address fields will not be reflected in the mailing address fields unless the button is clicked again.

Buttons (Add a Phone Modal):

- **OK –** Press this button to close the modal and add a new record unsaved record to the grid.
- **Cancel –** Press this button to close the modal without adding a new record to the grid.

- **Appointment Reminder Preference –** Selection options (Phone, Email, and Text) to determine the Family's appointment reminder preference.

- **How did you hear about WIC? Grid:**
  - **Add –** Click the Add button to display the add modal to add records to the How did you hear about WIC?

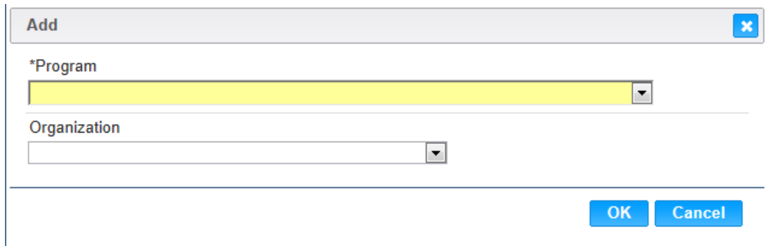


Figure 11.3: Add a 'How did you hear about WIC?' Modal

Fields (Add a How did you hear about WIC? Modal):

- **Program –** The program that referred the Family to WIC. This field is mandatory and selected from a drop down list.
- **Organization –** The organization that is affiliated with the program that referred the Family to WIC. This field is optional and is selected from a drop down list.

Buttons (Add a How did you hear about WIC? Modal):

- **OK –** Press this button to close the modal and add a new unsaved record to the grid.
- **Cancel –** Press this button to close the modal without a new record being added to the grid.

- **Save –** Press this button to save changes made to the page. For more information, see background process number four.
- **Reset –** Press this button to return the page to its original state without any changes being saved.
- **Cancel –** Press this button to close the page and return the user to the Client/Family Search page without a new Family record being added to the system.

Calculation(s): None

Background Processes:

1) A user may enter only one number with the priority of primary and one as secondary. As many numbers as desired may be entered that have a priority of other.
2) The phone appointment reminder preference option will be disabled if no phone number is listed or the do not call checkbox is checked for all numbers listed for the Family. The email option will be disabled if no email address is entered or the do not email checkbox is checked for the Family. The text option will be disabled if no number exists with the phone type of cell phone or the do not text checkbox is checked for the Family.
3) The majority of forms for Arizona will be in both English and Spanish. If populated while in a Client record, forms will populate in the primary language of the Family (Spanish or

English only). If the primary language is something other than Spanish or English, the default language will be English.

4) The system performs a four step save process when saving a new Family:
    a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
    b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
    c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
    d. Finally, after the other three steps have been completed successfully the system assigns a unique system generated Family ID to the Family and adds the Family data to the database. The Family ID format is FY9999999. The first two digits are dependent on the fiscal year from the Budgeting Factors table. The remaining 7 digits are a unique system generated sequence that is incremented by one after each new Family creation.

14 PRECERTIFICATION - CLIENT

The Precertification - Client page allows users to add client information for the processing of predetermining qualification of WIC services. This occurs at the clinic level.

Navigation Path: Scheduling | Precertification | Add New Client

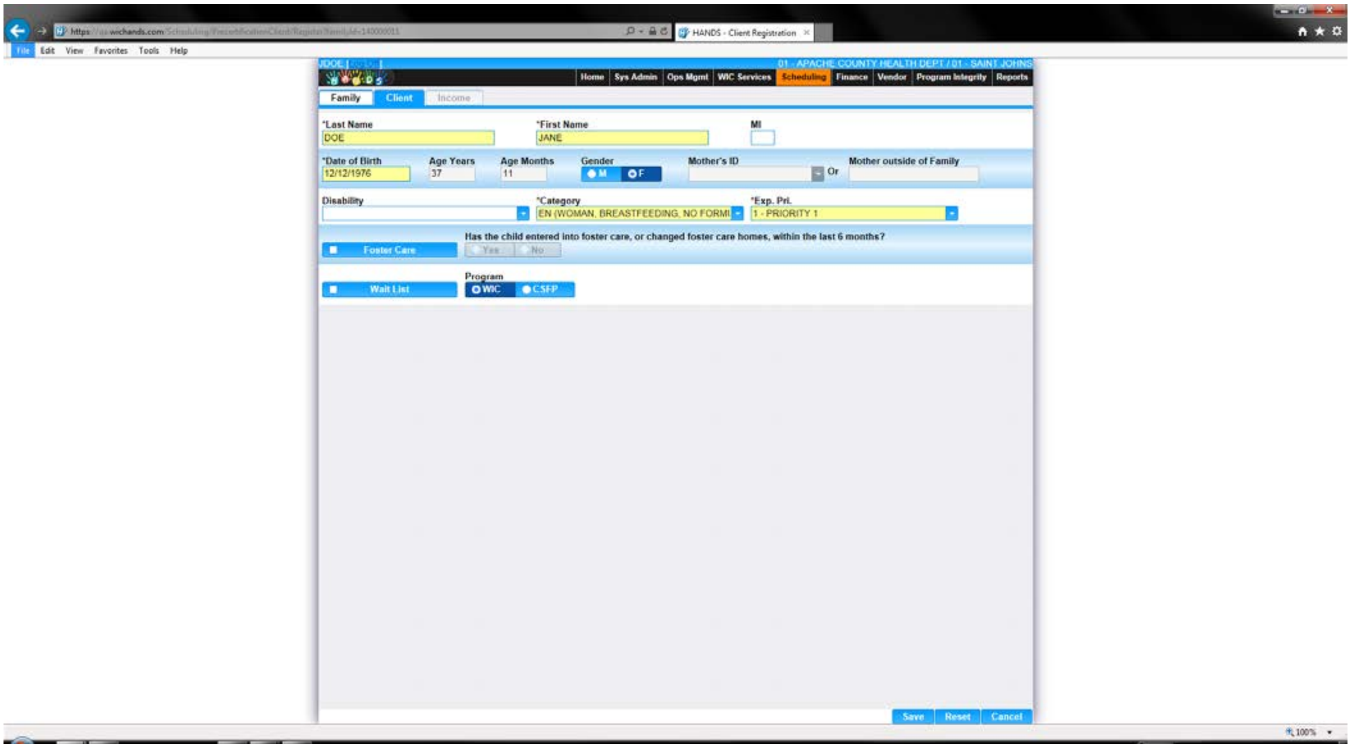


Fig 12.1) Precertification – Add a New Client

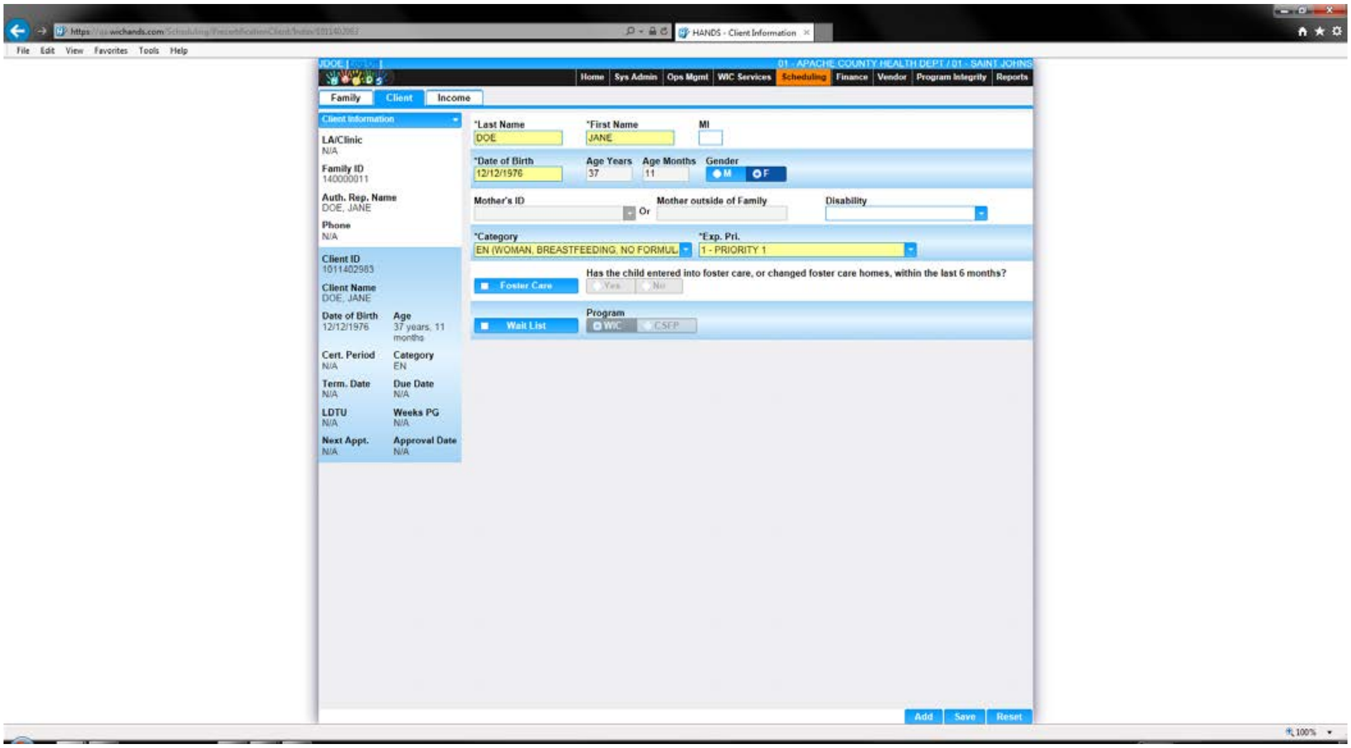


Fig 12.2) Precertification – Add a New Client

Fields:

- **Family ID –** The unique, system-generated identification number for the Family that was assigned when the Family was initially created. This field is display only.
- **Last Name –** The last name of the Client. This field is mandatory.
- **First Name –** The first name of the Client. This field is mandatory.
- **MI –** The middle initial of the Client. This field is optional.
- **Date of Birth –** The date of birth of the Client. This field is mandatory and stored in the format of MM/DD/YYYY. The user can either select the date from the calendar wizard provided or by manually entering the date. When manually entering the date the user does not need to enter the forward slash (/) it will be automatically populated. After the user enters a date of birth, a verification modal (Figure 12.3 below) will open to verify that the date of birth entered for the Client is correct. Pressing the Yes button will close the modal and allow the user to proceed with the Client Registration page. Pressing the No button will close the modal, clear the data entered in the date of birth field, and the user will be able to enter the correct date of birth which will start the process all over again. For more information, see background process number one.

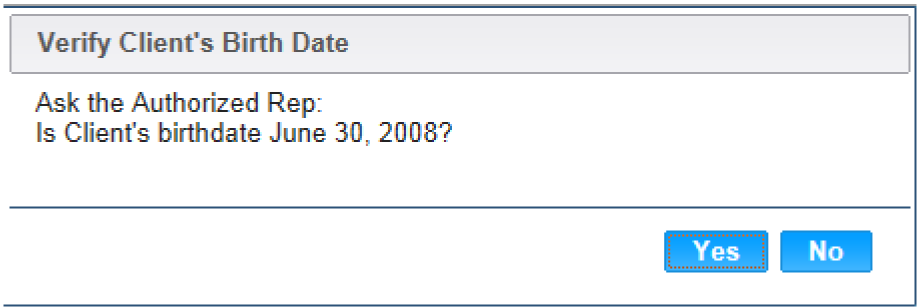


Figure 12.3: Verification of Client's Birth Date Modal

- **Age –** The calculated age of the Client. This field is display only and populates based on the date of birth entered. The format of the field is years followed by months.
- **Mother ID –** The Client ID of the mother's record within the same Family ID as the Client. This field is optional and selected from a drop down list. This field will be disabled for Clients over the age of six.
- **Mother outside of Family –** The Client ID of the mother's record outside of the Family ID of the Client. This field is optional.
- **VOC –** The verification of certification for an out of state transfer Client. This field is display only. If the Client does not have a verification of certification then the VOC field will populate with N/A. For more information, see the Out of State Transfer section of this document.
- **Application Date –** The date in which the Client Registration process was started. This field is display only and populates in the format of MM/DD/YYYY.
- **Disability –** The disability of the Client. This field is optional and selected from a drop down list.
- **Category –** To set the expected category code of the Client. This field is mandatory and selected from a drop down list.
- **Exp. Pri. –** To set the expected priority of the Client. This field is mandatory and selected from a drop down list.
- **Wait List –** To set that the client will be waitlisted. Clients could be waitlisted based on the priority, due to federal funding shortage.
- **Program –** To set that the client is being pre-certified for WIC Program or CSFP Program.

- **Foster Care:** Fields to determine the foster care status of the Client if any.
  - **Foster Care** – A checkbox to determine if the Client is a foster child or not. If the checkbox is checked then the Client is considered a foster child. If the checkbox is unchecked then the Client is considered not a foster child. This field is optional.
  - **Has the child entered into foster care, or changed foster care homes, within the last 6 months? –** Selection options (Yes or No) to determine the answer to the question for the Client. This field is disabled if the foster care checkbox is not checked. This field is mandatory if the foster care checkbox is checked. If Yes is selected then WIC Code 903 (Foster Care) is assigned to the Client. If No is selected then WIC Code 903 (Foster Care) is not assigned to the Client. For more

information on WIC Code calculations, see the Assessment section of this document.

- **Gender** - Selection options (M for Male or F for Female) to determine the gender of the Client. This field is mandatory.

Buttons:

- **Save –** Press this button to save changes made to the page.
- **Reset –** Press this button to return the page to its original state without any changes being saved.
- **Cancel –** Press this button to close the Client Registration page and return the user either the Family Information page or the Client Information page depending on which page the New Client button was pressed on.

Calculations:

1) The age field will populate with the calculated number of years followed by the number of months based on the number of days between the Client's date of birth and today. The number of days for the Client's age will be rounded down to the nearest month (i.e. Client is 2 years, 3 months and 25 days old. The age field will display 2 yrs, 3 mos).

Background Processes:

1) Date of Birth:
   a. For male Clients that have an age in years that is calculated to be five or greater an error message will be displayed (Figure 3.2 below) indicating that the Client cannot be registered in WIC. The save process will stop and the user will have to exit the page or update the date of birth for the Client.

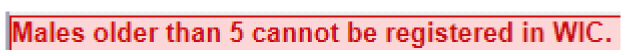


Figure 12.4: Males older than 5 error message

   b. For female Clients that have an age in years that is calculated to be between five and six an error message will be displayed (Figure 3.3 below) indicating that the Client cannot be registered in WIC. The save process will stop and the user will have to exit the page or update the date of birth for the Client.

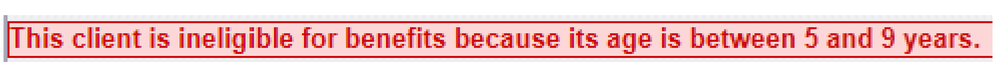


Figure 12.5: Females older than 5 error message

   c. For both male and female Clients between the ages of six and nine in years a modal (Figure 3.4 below) will display indicating that the Client cannot be registered in WIC. The Client will have to press the OK button to close the modal. The save process will stop and the user will have to exit the page or update the date of birth for the Client.

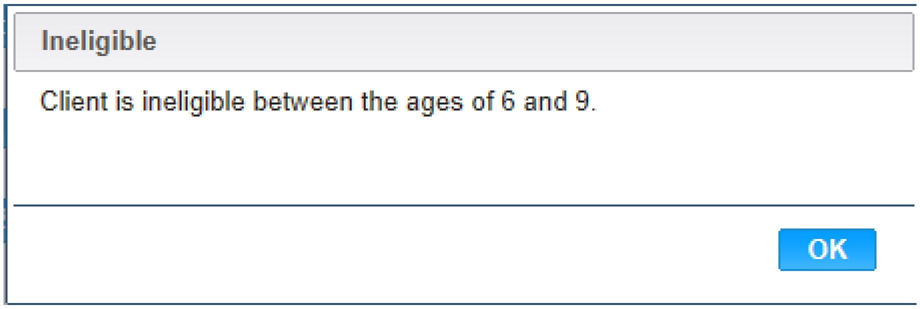


Figure 12.6: Ineligible between the ages of 6 and 9 Modal

   d. Female Clients who have an age in years greater than nine can be registered in WIC and successfully saved.

2) Only Client IDs for mothers (females over the age of nine) who are within the Family ID will be populated in the Mother ID drop down list. This allows for the Client to be linked to a mother within the Client's Family.

3) The Mother outside of Family field allows the entry of any mothers (females over the age of nine) Client ID throughout the system. This allows for the Client to be linked to a mother outside of the Client's Family.

4) The system performs a six-step save process when saving a new Client:

   a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.

   b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.

   c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.

   d. Fourth, it ensures that the Client is eligible to be saved based on the Clients date of birth. For more information, see background process number one.

   e. Fifth, it checks to see if the Client is a possible dual enrollment.

Finally, after the other five steps have been completed successfully the system assigns a unique system generated Client ID to the Client and adds the Client data to the database. The Client ID format is CLLA9999999. The first two digits (CL) is the organizational code of the Clinic that the Client is being created in. The second two digits (LA) is the organizational code of the Local Agency that the Client is being created in. For more information on organizational codes, see the Organizational Units section of the Operations Management DFDD. The remaining seven digits are a unique system-generated sequence that increases incrementally by one digit after the creation of each new Client. After the save process has been completed and the new Client has been assigned a Client ID, the Client will be within the Family record from which the process of creating a new Client was started. The user will be displayed on the new Clients, Client Information page.

POTENTIAL DUPLICATE CLIENT RECORD

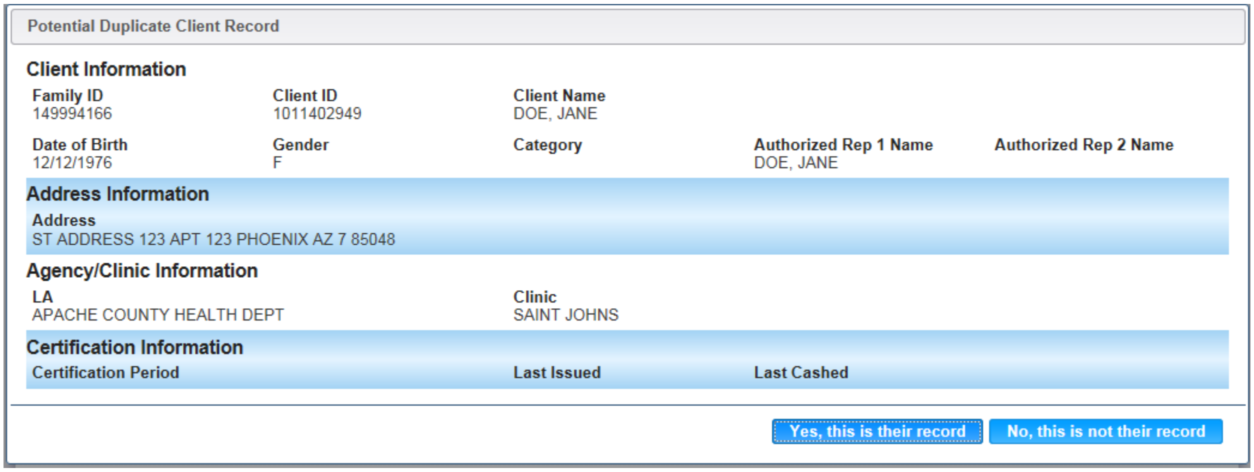


Figure 12.7: Potential Duplicate Client Record Modal

The purpose of this page is to help identify potential duplicate Clients in the State. When adding new Client records through the Client Registration, Precertification, or Out of State transfer pages the potential duplicate Client process will be used to help identify possible duplicates. Each potential match will be displayed on its own potential duplicate Client modal. The user will be forced to answer “No, this is not their record.” for each modal before successfully being able to add the new Client. Selecting “Yes, this is their record.” will navigate the user to the Family Information page for the Client’s record that was a match and the record that was trying to be saved will be discarded.

Fields:

- **Client Information:**
  - **Family ID –** The unique, system generated identification number for the Family of the potential duplicate Client. This field is display only.
  - **Client ID –** The unique, system generated identification number of the potential duplicate Client. This field is display only.
  - **Client Name –** The last name, first name, and middle initial, of the potential duplicate Client. This field is display only.
  - **Date of Birth –** The date of birth of the potential duplicate Client. This field is display only.
  - **Gender –** The gender of the potential duplicate Client. This field is display only.
  - **Category –** The category of the potential duplicate Client if one exists. This field is display only and will display blank if the Client has not been assigned a category.
  - **Authorized Rep 1 Name –** The last name, first name, and middle initial of the first authorized representative for the Family of the potential duplicate Client. This field is display only.
  - **Authorized Rep 2 Name –** The last name, first name, and middle initial of the second authorized representative for the Family of the potential duplicate Client if

one exists. This field is display only and will display blank if the Family does not have a second authorized representative saved.

- **Address Information:**
  - **Address –** Street 1, Street 2 (if it exists), and the City, State, ZIP Code, and County of the mailing address for the Family of the potential duplicate Client. This field is display only.

- **Agency/Clinic Information:**
  - **LA –** The Local Agency of the potential duplicate Client. This field is display only. The potential duplicate record process will attempt to identify potential matches throughout the users State Agency.
  - **Clinic –** The Clinic of the potential duplicate Client. This field is display only. The potential duplicate record process will attempt to identify potential matches throughout the users State Agency.

- **Certification Information:**
  - **Certification Period –** The certification start and end date for the potential duplicate Client. This field is display only and will display blank if no certification exists.
  - **Last Issued –** The last date to use of the last checked that was issued to the potential duplicate Client. This field is display only and will display blank if no checks have been issued.
  - **Last Cashed –** The date of the last check that was cashed for the potential duplicate Client. This field is display only and will display blank if no checks have been cashed.

Buttons:

- **Yes, this is their record –** Press this button to acknowledge that the information being displayed on the potential duplicate Client modal is in fact the Client being added. For more information, see background process number two.
- **No, this is not their record –** Press this button to acknowledge that the information being displayed on the potential duplicate Client modal is not the Client being added. For more information, see background process number three.

Calculations: None

Background Processes:

1) The identifying factors to determine if a Client is a potential match of another one within the State are: the first eight letters of the last name of the Client, first six letters of the first name of the Client, the birth month of the Client, the birth year of the Client, the gender of the Client, and the middle initial of the Client.

2) When the “Yes, this is their record” option is selected, then one of two scenarios will apply.
    a. If the Client record resides in the Clinic the Client is enrolling in, then Client record will return to the original record and automatically navigate the user to the Family Information screen. The user will update the necessary demographic information for the Family and then proceed with updating necessary Client information. The record that was being created is discarded.
    b. If the Client record resides in another Clinic within the Client’s Local Agency or in another Local Agency within the State, then the system will automatically navigate the user to the in-state transfer process where the user will be able to transfer the Family or Client into their Clinic. For more information, see the In-State Transfer section of this document. If upon the transfer, of the original Client record into the current LA/Clinic, the Client had received benefits within the same month as trying to be certified again, the system will prevent the user from receiving multiple benefits within the same month. An error message will display on the Issuance page to inform the user that the Client has already received benefits.

If the “No, this is not their record” option is selected, then the user will proceed with the current record and the saving of the new Client will occur successfully. The Client’s record will be flagged as a potential duplicate and the records will be linked together and appear on the resolve dual enrollment screen.

15 PRECERTIFICATION – INCOME

The Precertification-Income page is used to collect income records for a Family based on all of the Client's income records within that Family. The income records are then used to check the Income Eligibility for the family members for the WIC or CSFP Program. The user has the ability to add income records and manually assign them to different combinations of Clients within the Family. The system will notify the user if the combination of income records entered for a Client exceeds the monthly allowable income level range for the Client's Family size as defined in the income levels base table. It is possible for some Client's to be ineligible and some to be eligible within the same Family.

Navigation Path: Scheduling | Precertification | Income

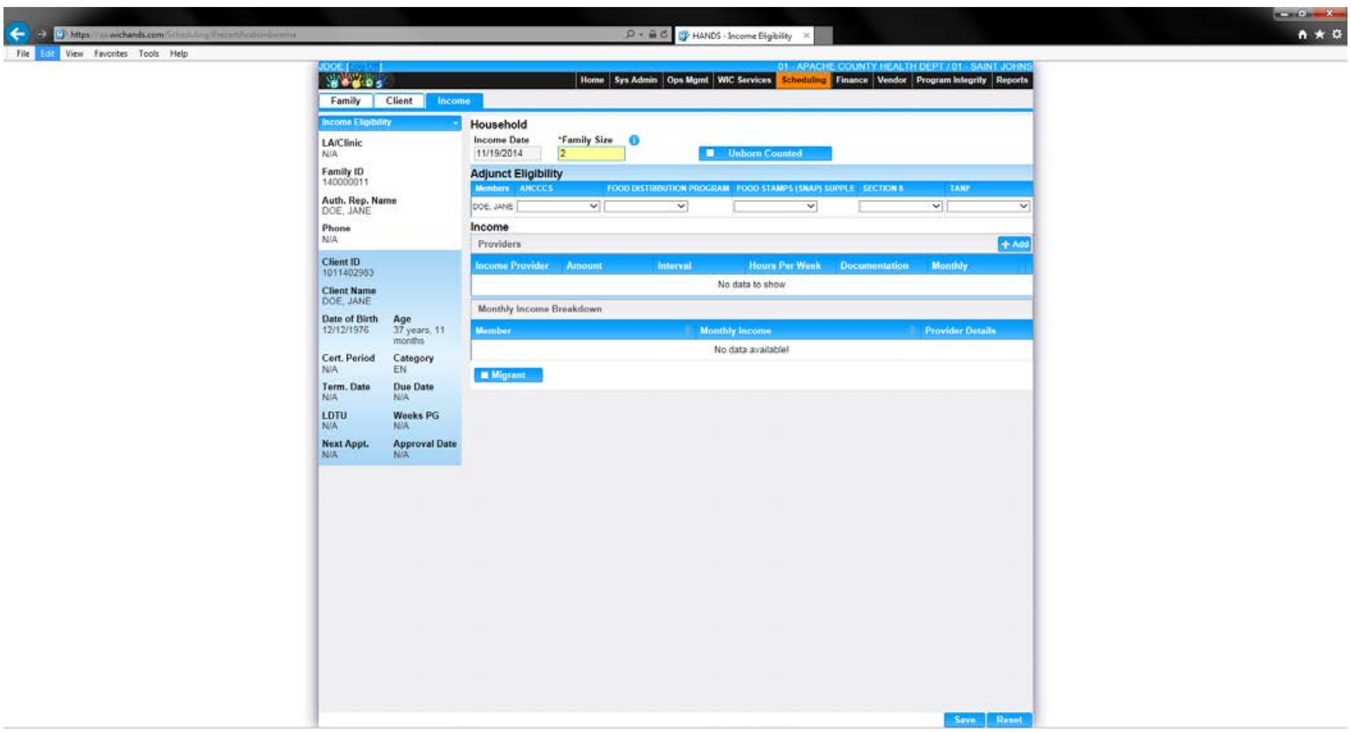


Figure 13.1: Precertification - Income

Fields:

- **Income Date –** The date that the income was recorded. This field is display only and will default to the current date when adding a new income record for a Family.
- **Family Size –** The size of the Family. This field is mandatory. If the user hovers over the **(Information Icon)** with the mouse additional information will be displayed (Figure 4.1 below) about what to enter as Family size. The Family size is used in the calucaltion to determine if the Client and or Family meet the requirments to be on the WIC program. For more information, see calculation number one.

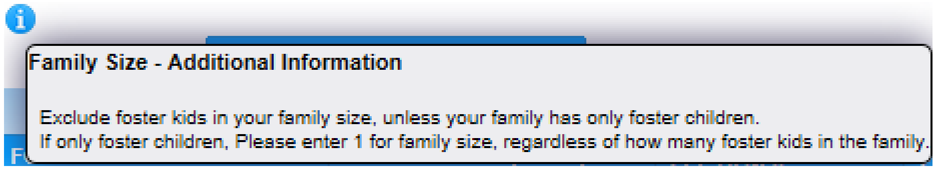


Figure 13.2: Family Size – Additional Information

- **Unborn Counted –** A checkbox to determine if unborn children are being counted in the Family size. If the checkbox is checked then any unborn children are being included in the Family size. If the checkbox is unchecked then unborn children are not being included in the Family size.
- **Adjunct Eligibility Grid:** A grid used to record adjunct eligible program statuses for individual Clients within the Family. All Clients will be displayed in individual rows and allow the user to update the status for each adjunct program. Each adjunct program will use a drop down list for selection of status. The options in the drop down will be: Part. Proof, Part. No Proof, Referred, Fam Elig Proof, and N/A. It is not mandatory that the user select a status for any program.
  - **Members –** The last name, first name, and middle initial for a Client within the Family. This field is display only.

  NOTE: The adjunct eligible programs that display can be customized by the State Agency. The five adjunct eligible programs below are based on the Arizona State Agency setup of the HANDS application.

  - **AHCCS (Medicaid) –** If a pregnant mother or an infant in a Family is Part. Proof, then the entire Family is eligible regardless of income. For children over the age of twelve months who are Part. Proof, only the Child is eligible not the entire Family.
  - **Food Distribution Program –** If a Client within a Family is Part. Proof, then the entire Family is eligible.
  - **Food Stamps (SNAP) Supple –** If a Client within a Family is Part. Proof, then only the Client is eligible not the entire Family.
  - **Section 8 -** If a Client within a Family is Part. Proof, then the entire Family is eligible.
  - **TANF –** If a Client within a Family is Part. Proof, then the entire Family is eligible.

- **Income Providers Grid:** A grid used to display all Family income records.
  - **Income Provider –** The name of the income provider. This field is display only.
  - **Amount –** The amount the Client is paid. This field is display only.
  - **Interval –** How often the Client is paid. This field is display only.
  - **Hours Per Week –** How many hours per week the income provider works. This field is display only. This field will display blank if interval selected is not hourly.
  - **Documentation –** The documentation used as the proof for the income record. This field is display only.

  - **Monthly –** The calculated monthly amount for the income record provided. This field is display only. For more information, see calculation two.
- **Monthly Income Breakdown Grid:** A grid used to show a Client's monthly income breakdown for all of the Client's income providers. This grid will populate blank when no income providers exist.
  - **Member –** The last name, first name, and middle initial for a Client within the Family. This field is display only.
  - **Monthly Breakdown –** The calculated monthly income for the Client based on all income provider records for the Client. This field is display only.
  - **Provider Details –** Press this button for additional information (Figure 4.2 below) on how the Client's monthly income is broken down between all the different income providers. Press this button again to close the additional information section of the grid.

Figure 13.3: Monthly Income Providers Details

- **Migrant –** A checkbox to determine if the head of the household is an individual whose principle employment is on a seasonal basis, who has been so employed within the last 24 months and who establishes, for the purpose of employment, temporary residence. If the checkbox is checked, all Clients within the Family will have the checkbox checked. If this checkbox is checked the system assigns WIC Code 802 for all Clients in the Family.

Buttons:

- **Add –** Click the Add button to display the add modal and add records to the Income Providers grid.

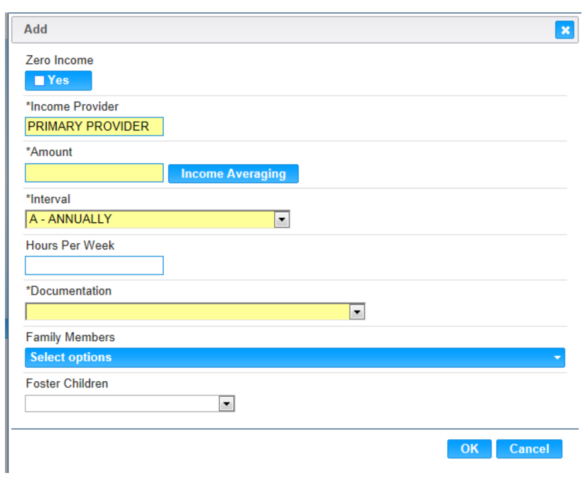


Figure 13.4: Add an Income Provider Modal

Fields (Add an Income Modal):

- **Zero Income –** A checkbox used to determine zero income. If the checkbox is checked the amount field defaults to zero and is disabled, the interval field defaults to A-Annually and is disabled.
- **Income Provider –** The name of the income provider. This field is mandatory and defaults to “Primary Provider.”
- **Amount –** The amount the Client is paid. This field is mandatory and only accepts numbers greater than one.
  NOTE: If the user wishes to enter zero they would use the zero income checkbox.
- **Interval –** How often the Client is paid. This field is mandatory and selected from a drop down list.
- **Hours Per Week –** How many hours per week the income provider works. This field is mandatory and defaults to 40, if the interval selected is hourly if not then this field is disabled.
- **Documentation –** The documentation used as the proof for the income record. For more information see, background process number four. This field is mandatory and selected from a drop down list.
- **Family Members –** A drop down list that contains all non-foster care Clients within the Family. This field is mandatory. The user is allowed to select only one Client or may select multiple to assign the income provider too.
- **Foster Children –** A drop down list that contains all foster care Clients within the Family. This field is mandatory if no Clients are selected from the Family members drop down list. The user may only select one Client.
  NOTE: Foster Children are considered part of their own Family and therefore must be assigned to an income provider record by themselves. Users may not select Family members and Foster Children for the same income provider record.

Buttons (Add an Income Modal):

- **Income Averaging–** Press this button to open the income averaging modal. Income averaging is used for the cases in which a Client receives varying income amounts per interval (i.e., part-time employment). Intervals and amounts are entered and an average is automatically generated. This average is transposed into the amount field on the Add an Income modal (Figure 4.3 above).

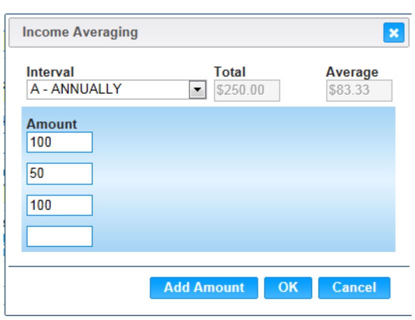


Figure 13.5: Income Averaging Modal

Fields (Income Averaging Modal):

- **Interval –** How often the Client is paid. This field is mandatory, defaults too annually, and selected from a drop down list.
- **Total –** The sum of the amount fields (Add the amount fields displayed on the modal with data entered together).
- **Average –** The calculated average of the amount fields (Take the number displayed in the total and divide by the number of amount fields displayed on the modal with data entered). This field is display only.
- **Amount –** The amount the Client is paid. This field is mandatory and only accepts numbers greater than one.

Buttons (Income Averaging Modal):

- **Add Amount –** Press this button to add another amount data entry field to be used for calculating the total and average amount.
- **OK** – Press this button to close the modal. The number displayed in the average field will be displayed in the amount field on the Add an Income modal along with the interval entered (Figure 4.3 above).
- **Cancel** – Press this button to close the modal without new data being added.

- **OK –** Press this button to close the modal and add a new unsaved record to the grid.
- **Cancel –** Press this button to close the modal without a new record being added to the grid.

- **Save –** Press this button to save changes made to the page.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) As the amount and interval for the income record are selected the system performs the following calculations to calculate the monthly amount for each income provider's record.
   a. If the interval selected is annually then the system rounds the result received by dividing the number entered in the amount field by twelve.
   b. If the interval selected is weekly then the system rounds the result received by multiplying the number entered in the amount field by fifty-two and then dividing the result by twelve.
   c. If the interval selected is monthly then the system displays the number entered in the amount field.

d. If the interval selected is bi-weekly then the system rounds the result received by multiplying the number entered in the amount field by twenty-six and dividing by twelve.

e. If the interval selected is semi-monthly then the system rounds the result received by multiplying the number entered in the amount field by two.

f. If the interval selected is hourly then the system rounds the result received by multiplying the number entered in the amount field by the number entered in the hourly field, then multiplying that result by fifty-two and then dividing the result by twelve.

g. If the interval selected is quarterly then the system rounds the result received by dividing the number entered in the amount field by three.

h. If the interval selected is semi-annually then the system rounds the result received by dividing the number entered in the amount field by six.

Background Processes:

1) If Part. Proof is selected, it represents the Client/Family is adjunctively eligible for the adjunct program and will receive up to maximum food benefits that the adjunct program allows. If Part No Proof is selected and the Client/Family is not income eligible, the Client/Family will remain ineligible until proof is brought in for the adjunct program. The Client/Family can be on one or more adjunct programs, but is only required to show proof for one of the adjunct programs to receive up to maximum food benefits. Adjunct program data will display on the PC Extract if either Part. Proof or Part No Proof is selected. The Fam Elig Proof option is used for a Client that is eligible based on another Family member having Part. Proof selected for an adjunct program that makes the entire Family eligible. Adjunct Eligibility data entered and saved will be locked during the End of Day process.

2) The system performs a six step save process when saving a new household income:

    a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.

    b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.

    c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.

    d. Fourth, it checks to see what statuses have been entered for the adjunct eligible programs if any.

    e. Fifth, it ensures that the calculated monthly income amount is within an acceptable range for the WIC program in regards to the Family's size.

f. Finally, after the other five steps have been completed without issue, the system will successfully save the page. The user will only be able to edit the income record that day. It will become completely disabled after the End of Day process.

3) If the Client is adjunctively eligible, the system will not permit an entry of zero income and on save an error message will be displayed. After zero income has been successfully saved for the Client, a form modal will open asking the user if they would like to print the zero income waiver form.

16 APPOINTMENT SCHEDULER

Overview:

HANDS – Appointment Scheduler is a very flexible, robust and easy to use intuitive scheduling system. Appointment Scheduler provides easy ways to manage Appointments and Group Classes like scheduling, rescheduling, cancelling and updating. Scheduler also provides easy navigation between WIC Services and the scheduling system.

The clinic calendar month view will display a preview of appointment availability information including clinic hours of operation, clinic closed dates within the month and holidays. When you navigate to the calendar, by default the calendar will load for the clinic you are logged into for the current month and the selected date will be today.

Users will be able to view both the month overview and daily appointment sheet through the use of the Calendar tool. The one month view Calendar tool will be visible on the page and when the user selects a day, the day will display as an appointment sheet. Column time which is not available for schedule is grayed out on appointment sheet and user cannot select these time values to schedule appointments. User can click on available time to schedule appointments and can drag the timeslot to increase the selected time. User can select 15 minutes timeslot or can increase it more as long as next timeslot is available by dragging the selected timeslot.

The calendar month view is color coded to assist the user with scheduling tasks. The dates on the Scheduler Calendar and the Appointment Sheet will have different colors as follows:

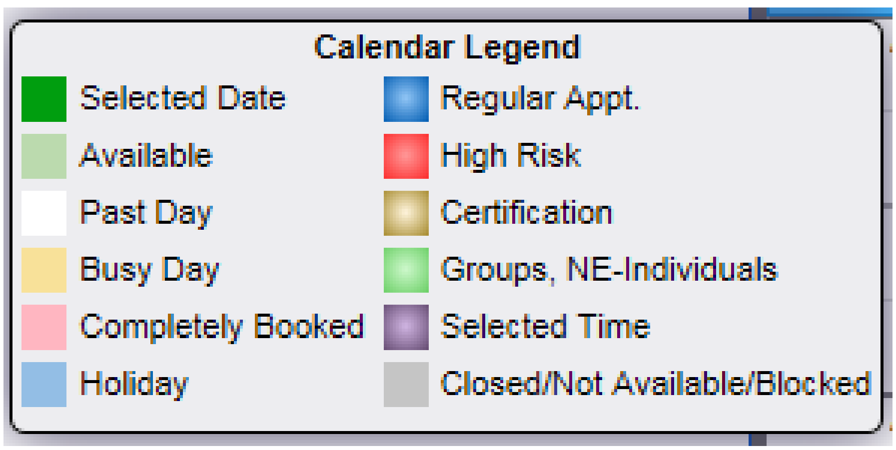


Figure 14.1: Appointment Scheduler – Calendar Legend

Navigation Path: Scheduling | Appt Scheduler

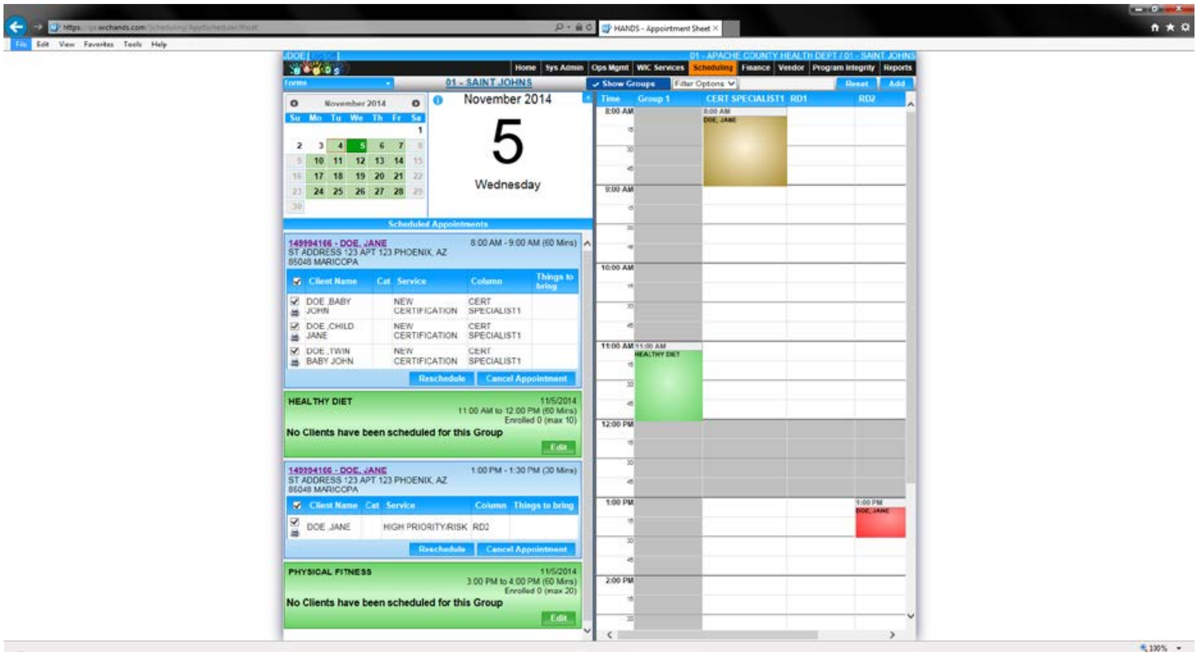


Figure 14.2: Appointment Scheduler

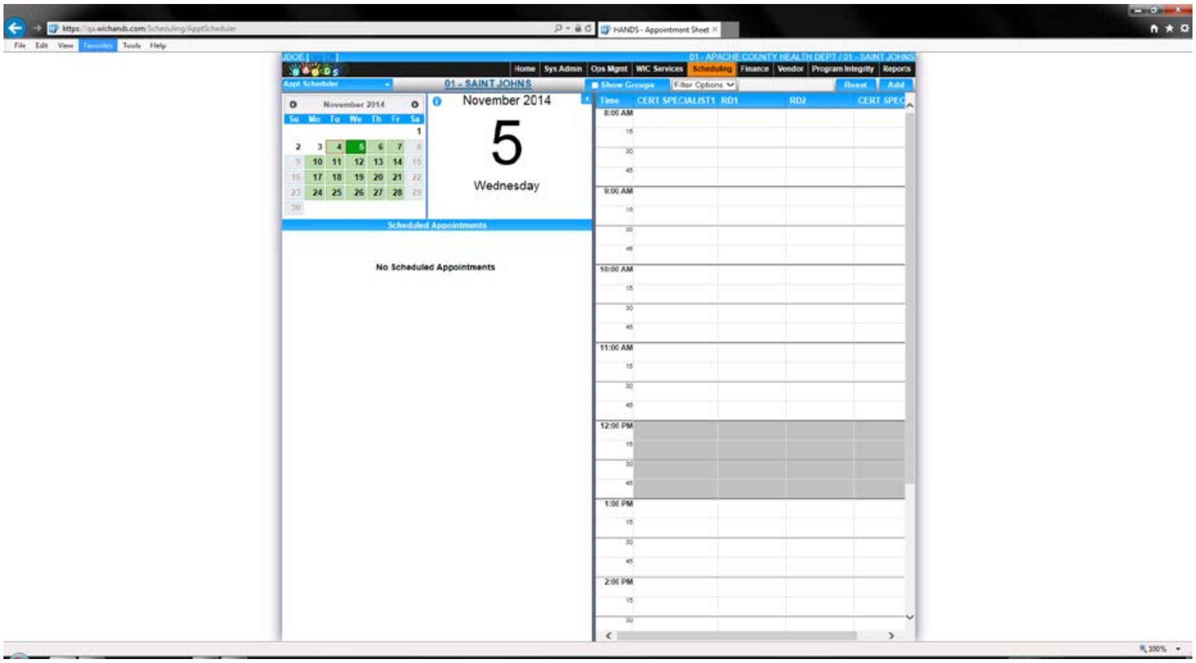


Figure 14.3: Appointment Scheduler

Fields:

- ***Month View** (Calendar Date Setter) —To preview the scheduling for entire month with ability to set and the month and scheduling date.*
- ***Show Groups** – To show the scheduled Nutrition Discussion Groups in the Scheduler.*

- ***Filter Options –****These options allow user to refine the data available on clinic's appointment sheet. User can narrow down the scheduler data to better serve the client scheduling needs.*

  Family Ids: *When this option is selected, user can enter a family id or family ids (comma separated) to bring only family appointments entered by the user. System brings the columns availability information along with the family appointments.*

  Columns: *User can filter the appointment sheet data for one or more columns by using this option. User can enter full column name, if available, or enter a part of the column name, system then looks for all columns which are matching entered value and shows them on the clinic's calendar. For example, clinic-A calendar is set up with two columns. High Risk, Breastfeeding counseling. If user enters 'High' in the filter box then system gets the High Risk column availability and shows on the appointment sheet.*

  Services: *User can use this option to get the columns which perform entered service. If user wants to get only columns performing 'Certification' service, then user can choose this filter option and enter 'certification' in the filter box. System then looks for all the columns which perform certification service and shows these columns availability on the appointment sheet.*

  Columns and Services filter search is case insensitive.

Family Appointment:

- ***Authorized Rep Name** – Displays the family name with a link to quick navigation to the family record.*
- ***Contact Information** – Address and Phone number but if the family have selected do not contact on phone and mail, then the system shows DO NOT CONTACT.*
- ***Client Name** – Displays the Name of the Client coming for the appointment.*
- ***Cat** – Displays the Category of the Client.*
- ***Service** – Displays the Appointment Type/Service for which the client is coming.*
- ***Column** – Displays the service provider column name, the appointment is booked.*
- ***Things to bring** – Displays if there are any items that are assigned to be brought with the client for the appointment.*

Buttons:

- ***Search** – To filter the scheduler.*
- ***Add** – To create/book/schedule new appointments.*
- ***Reset** – To remove filter options and brings the appointment sheet to its default state.*
- ***Check-In** – To track the client wait time and for better reporting.*
- ***Undo – Check-In** – To revert the check-in action.*
- ***Check-Out** – To track the client wait time and for better reporting*

- ***Undo Check-Out***– *To revert the check-out action.*
- ***Reschedule***– *To initiate the reschedule process of the individual appointment or whole family appointment.*
- ***Cancel Appointment***– *To cancel the individual appointment or whole family appointment.*

Calculation(s):

Busy Day: *System notifies the user about busy days by showing calendar day in a different color. For a given day, system first calculates all columns time and total used time then calculates total available time for that day by subtracting total used time from all columns time. If used time greater than half of available time, then system marks that day as busy day.*

Completely Booked Day: *If all the columns for a given day have no available time left then system shows that day as completely booked. System shows these days with a unique color to identify easily on mini month control..*

Background Processes:

- *Appointment Scheduler data will be refreshed automatically every 3 minutes unless the user has already selected a timeslot and is in the Add Appointments popup.*

- *Walking appointments are checked in automatically.*

- *System will allow users to Check-in and Check-out for selected clients with a family appointment. Check-In, Check-Out will only be available for appointments, if the appointment date and calendar date (Today) are the same.*

- *Undo checkout is NOT allowed if the checks are printed already for the client on that day.*

- *When the user selects Show Groups to see current day's group nutrition discussion classes and if there are more two or more overlapping groups then system shows two or more columns (count equal to number of overlapping groups) to show groups individually.*

17 APPOINTMENT SCHEDULER – ADD APPOINTMENT

There are two ways to book appointments for clients in the system. User can select timeslots on appointment sheet and click Add button which opens Add Appointment popup and system pre fills the selected time slot data on this screen. Family id search is used to bring the clients in the family. After family search button is clicked, system brings the eligible clients and fills the client drop down with these clients.

Second option is to click Add button without selecting a timeslot. User can enter desired start time and end time on Add Appointment popup screen, system automatically filters columns that are available based on entered start time and end time. User can select appropriate column from list of available columns for entered time range which then fills service drop down with services performed by this column.

Users who have override appointment service permission will see an additional drop down which contains all the available services in the system. If desired service is not available under service drop down for a column, user can select the desired service under Override Service, system then creates appointment with selected override service option.

Navigation Path: Scheduling | Appt Scheduler | Add

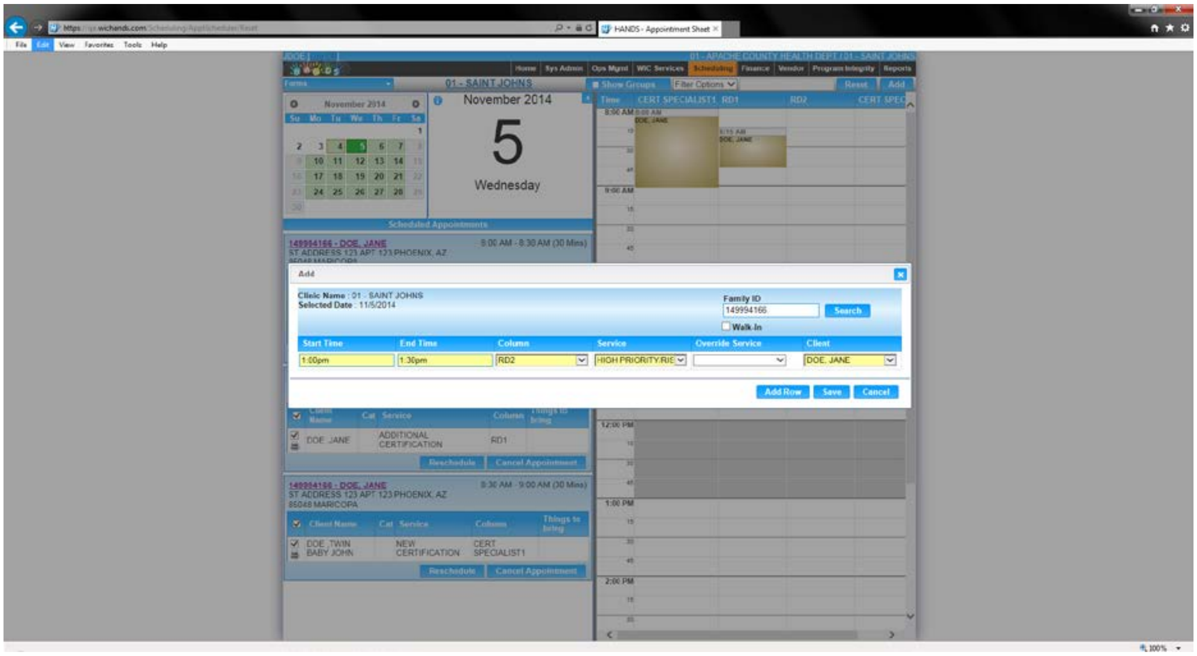


Figure 15.1: Appointment Scheduler – Add Appointment

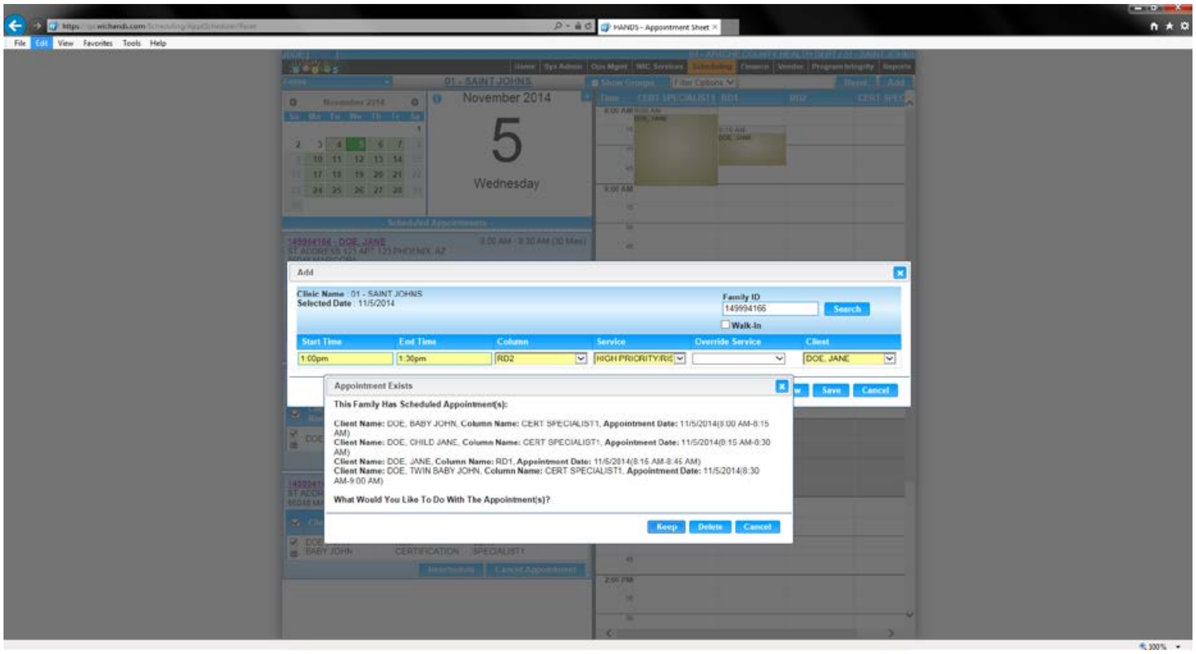


Figure 15.2: Appointment Scheduler – Add Appointment

Fields:

- ***Clinic Name*** *– Displays the Clinic Name where the appointment is getting created.*
- ***Selected Date*** *– Displays the date in which the appointment is getting created.*
- ***Family ID*** *– To select the clients to book appointments within a family.*
- ***Walk-In*** *– Identifies the appointments that are getting created are Walk-In.*
- ***Start Time*** *– Just displays the pre-selected start time of the appointment, if the timeslot(s) is selected prior to clicking the Add button in the main screen. Allows user to select start time of the appointment, if there was no time selected prior to clicking the Add button on the main screen.*
- ***End Time*** *– Just displays the pre-selected end time of the appointment, if the timeslot(s) is selected prior to clicking the Add button in the main screen. Allows user to select end time of the appointment, if there was no time selected prior to clicking the Add button on the main screen.*
- ***Column*** *– Just displays the pre-selected Column (Service Provider) of the appointment, if the timeslot(s) is selected prior to clicking the Add button in the main screen. Allows user to select Column (Service Provider) of the appointment available within the selected start and end time, if there was no time selected prior to clicking the Add button on the main screen.*
- ***Service*** *– Allows user to select Service offered by the selected column within the selected start and end time.*
- ***Override Service*** *– Allows user to select Override Service, if the selected column within the selected start and end time is not providing the service, but the user needs a special role to do set this option.*

- ***Client** – To select the client within the selected family, for whom the appointment is getting created.*

Buttons:

- ***Search** – To select the clients within the selected family.*
- ***Add Row**– To book additional appointments.*
- ***Save** – To schedule appointments.*
- ***Cancel** – To revert the changes made and close the popup.*
- ***Keep** – To keep the old appointment and book the new appointments in the duplicate appointment window.*
- ***Delete**– To just delete the old appointment in the duplicate appointment window, this option doesn't book the new appointments automatically.*

Calculation(s):

- *System performs various validations such as*

    a. *Timeslots are still available,*

    b. *The same timeslots are not used multiple times.*

    c. *Appointments are booked as per Federal Processing Standards 10/20 rule.*

Background Processes:

- *New Appointment can be created by selecting one or more time slots within the same column or across different columns and selecting Add at the top of the screen.*

- *Add Row is allowed only if the time slots are not selected prior to clicking Add in the main screen.*

- *Walk-in appointments can also be created in the same modal window. Walk-In appointments are used to track and check-in families/clients that do not have a pre-arranged appointment. Walk-In appointments are not tied to a specific time slot, just a listing of the clients that walked in to the clinic, service type and the time they walked in.*

- *Each appointment will have Start Time, End Time, Column, Service and Client.*

- *Based on the 10/20 day rule, there will be a clear visual representation and an additional column that the client rejected the earlier appointment.*

- *When user looks up clients by Family ID, the system only brings eligible clients. i.e., not deceased clients and categorically eligible clients.*

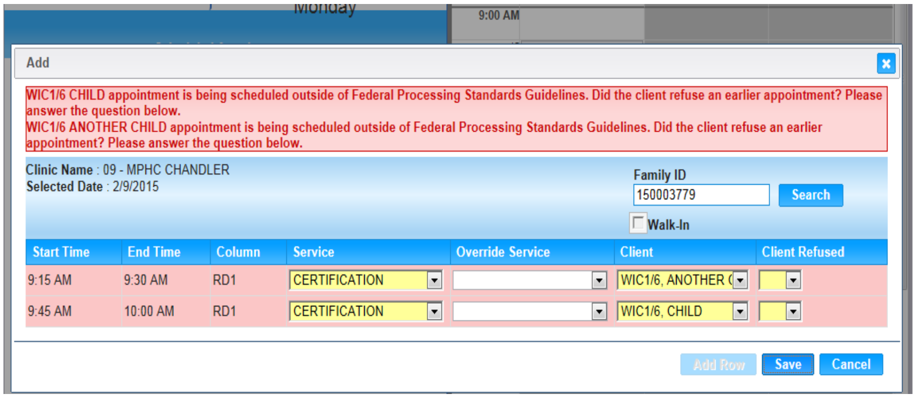


Figure 15.3: Appointment Scheduler – 10/20 Rule

The system checks if clients are certified within the 10/20 day rule as outlined in the federal regulations.

Within 10 days: Priority 1 pregnant woman, infants under six months of age, homeless, and migrants needs to be notified with in the 10 calendar days Priority I pregnant women, infants under six (6) months of age, homeless, and migrants will be notified of their eligibility, ineligibility, or placement on a waiting list within ten (10) calendar days of the date of request for WIC services.

Within 20 days: All other applicants requesting WIC services will be notified of their eligibility or ineligibility or placement on a waiting list within twenty (20) calendar days of the date of request for WIC services.

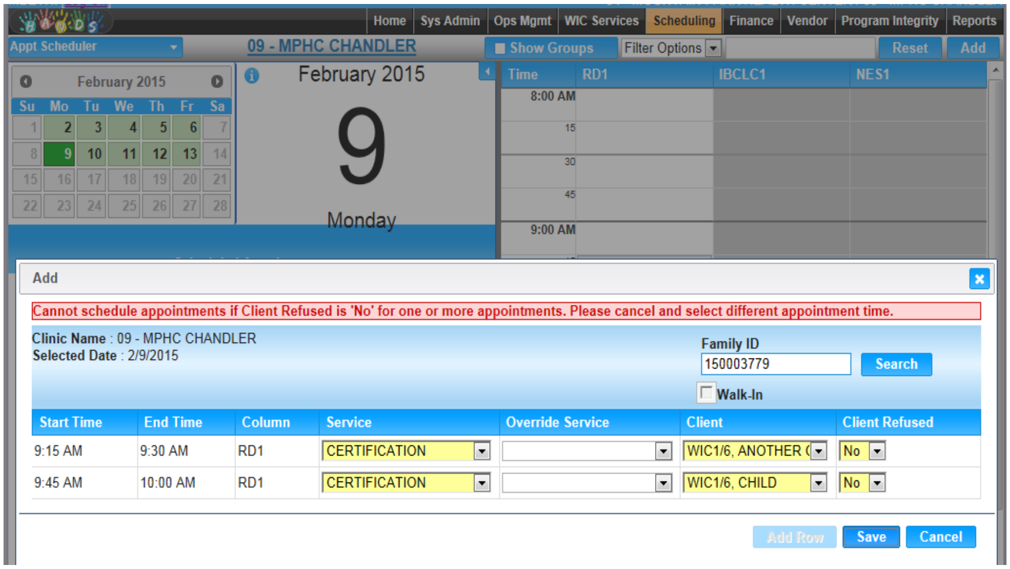


Figure 15.4: Appointment Scheduler – Client Refused

If client refuses an earlier appointment, system goes ahead and schedules requested appointments and also captures the client refused flag. If client is not refusing an earlier appointment and system cannot find appointments within the 10/20 day rule, system stops user from creating these appointments.

18 APPOINTMENT SCHEDULER - RESCHEDULE

The Appointment Scheduler - Reschedule page allows users to reschedule clients for appointments. This occurs at the clinic level.

Navigation Path: Scheduling | Appt Scheduler | Reschedule

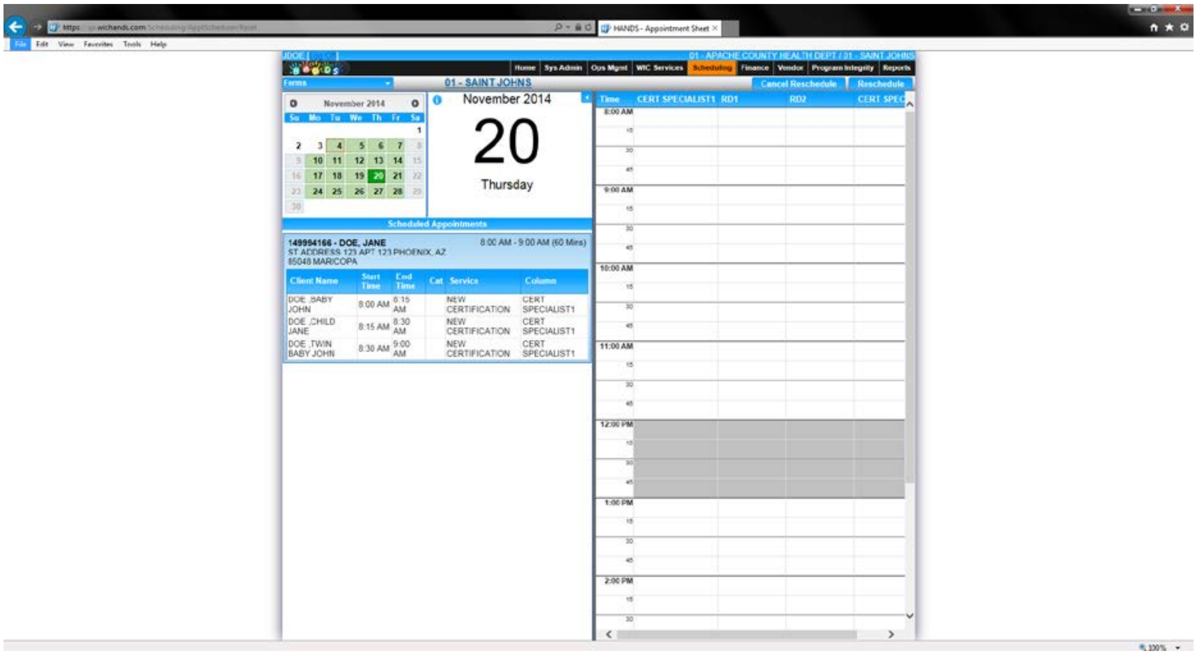


Figure 16.1: Appointment Scheduler - Reschedule

Fields:

- ***Month View** (Calendar Date Setter) —To preview the scheduling for entire month with ability to set and the month and scheduling date.*

<u>Appointment(s) that are getting rescheduled:</u>

- ***Authorized Rep Name** – Displays the family name.*
- ***Contact Information** – Address and Phone number but if the family have selected do not contact on phone and mail, then the system shows DO NOT CONTACT.*
- ***Client Name** – Displays the Name of the Client coming for the appointment.*
- ***Start Time** – Displays the Start Time of the each appointment within the main family appointment that is getting rescheduled.*
- ***End Time** – Displays the End Time of the each appointment within the main family appointment that is getting rescheduled.*
- ***Cat** – Displays the Category of the Client.*
- ***Service** – Displays the Appointment Type/Service.*
- ***Column** – Displays the service provider column name, the appointment is booked.*

Buttons:

- ***Reschedule**– To reschedule individual appointment or whole family appointment with the selected timeslots.*
- ***Cancel Reschedule** – To cancel out of the reschedule process.*

Calculation(s):

- *System performs various validations such as*

  a. *Timeslots are still available,*

  b. *The same timeslots are not used multiple times.*

  c. *Appointments are booked as per Federal Processing Standards 10/20 rule.*

  d. *Count of Number of timeslots selected should be equal to count of appointments to be rescheduled. If user trying to reschedule 4 appointments and user selected 3 timeslots on appointment sheet, then system shows a message which helps user to pick correct number of timeslots needed to reschedule all appointments.*

Background Processes:

- *Appt. Scheduler reloads with the filtered availability information (mini month and columns) based off the services of the appointments that are getting rescheduled.*

- *Based on reschedule appointments services and selected timeslot services, system automatically maps the clients to the newly selected reschedule timeslots so that user doesn't have to assign clients to selected timeslots manually.*

- *System blocks the user if selected timeslots are not enough to use to reschedule appointments.*

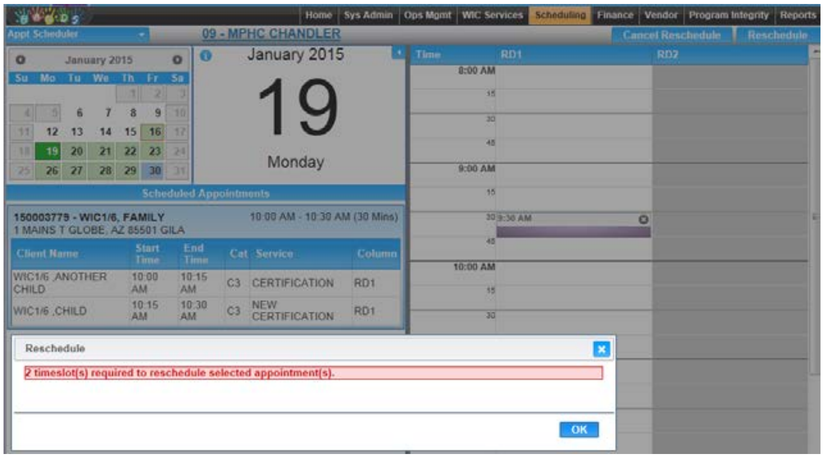
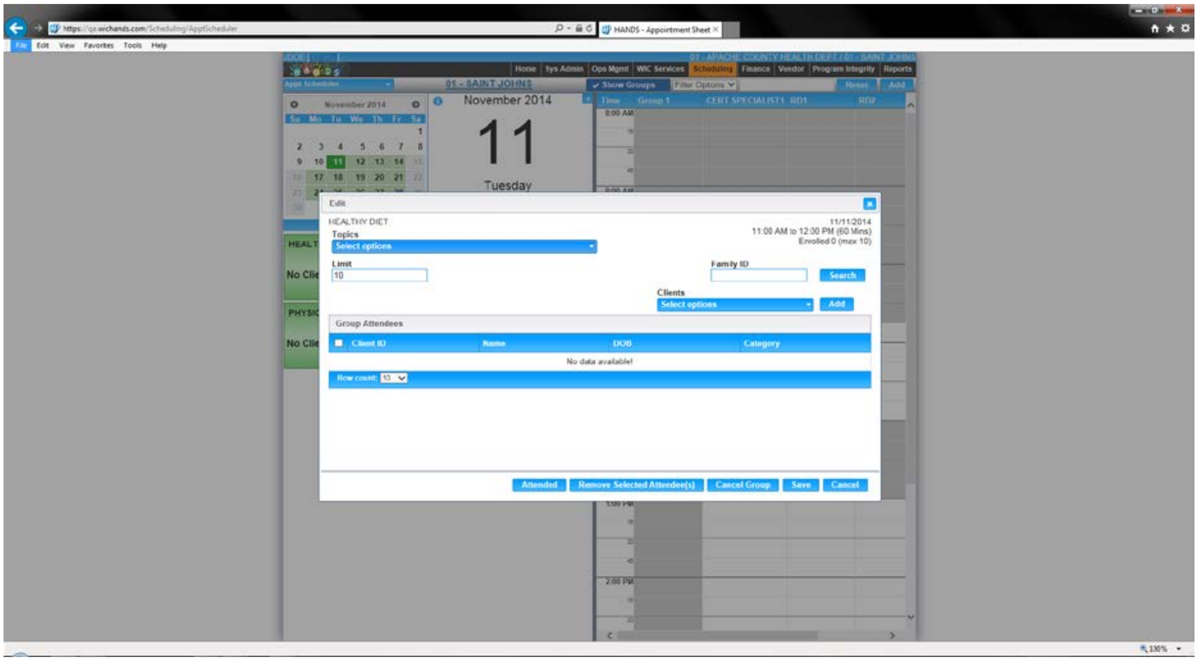


Figure 16.2: Appointment Scheduler – Multiple Time Slots

19 APPOINTMENT SCHEDULER – GROUP NUTR. DISC. CLASS

Navigation Path: Scheduling | Appt Scheduler | Edit



Fields:

- ***Group Name** – Displays the Name of the Nutrition discussion class name.*
- ***Date** – Displays the date in which Nutrition Group is scheduled.*
- ***Time** – Displays the time in which Nutrition Group is scheduled.*
- ***Topics** – To update the list of topics that are discussed in Nutrition Group.*
- ***Limit** – To set the maximum number of clients allowed to attend the Nutrition Group.*
- ***Family ID** – To search for the family by ID.*
- ***Clients** – To select the clients to add them to the Nutrition Group.*

<u>Group Attendees:</u>

- ***Client ID** – Displays Identification number of the client.*
- ***Name** – Displays the name of the client.*
- ***DOB** – Displays the date of birth of the client.*
- ***Category** – Displays the category of the client.*

Buttons:

- ***Attended** – To manually update the client's attendance.*
- ***Remove Selected Attendee(s)** – To remove the selected clients from the Nutrition Group.*
- ***Cancel Group** – To cancel the Nutrition Group, which is allowed only when there is no clients scheduled for the class.*
- ***Save** – To commit the changes done like adding/removing attendees, topics and etc.*
- ***Cancel** – To revert the changes made and close the popup.*

Calculation(s): None

Background Processes: None

20 WALK IN APPOINTMENTS

Navigation Path: Scheduling | Walk in Appointments

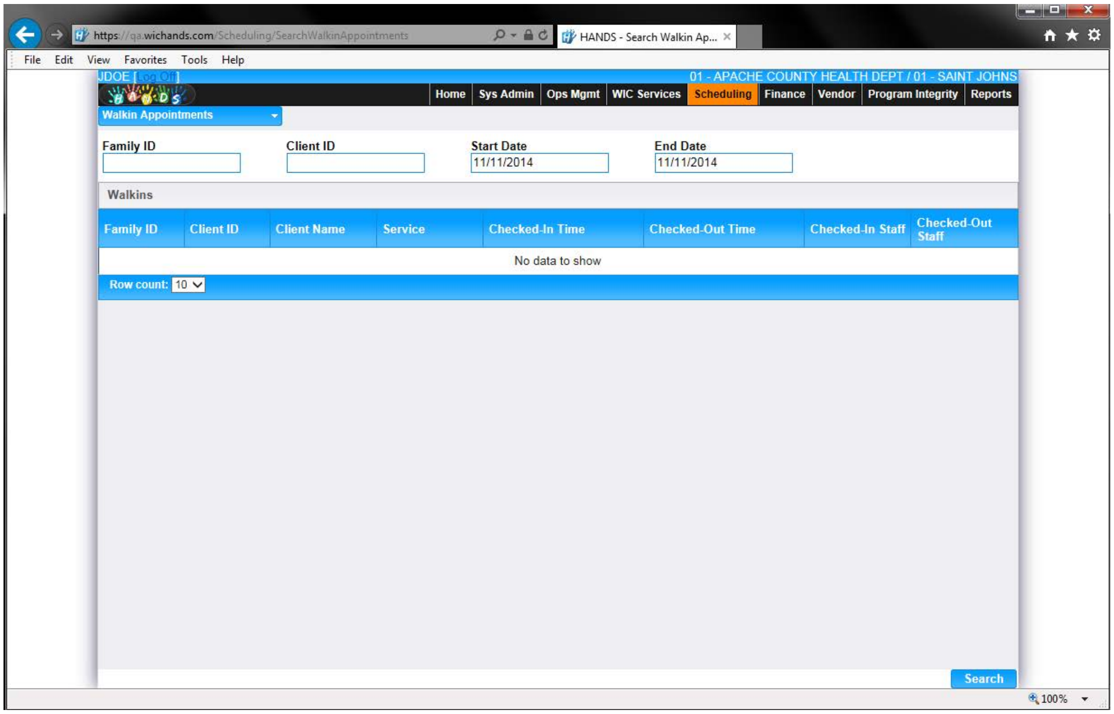


Figure 17.1: Appointment Scheduler – Walkin Appointments

Fields:

- ***Family ID** – To search walk-in appointments for a specific Family.*
- ***Client ID** – To search walk-in appointments for a specific Client.*
- ***Start Date, End Date** – To search walk-in appointments for a specific period.*

<u>Group Attendees:</u>

- ***Client ID** – Displays Identification number of the family.*
- ***Client ID** – Displays Identification number of the client.*
- ***Client Name** – Displays the name of the client.*
- ***Service** – Displays appointment service for which the client walked-in.*
- ***Checked-In Time** – Displays the exact time when then client walked-in.*
- ***Checked-Out Time** – Displays the time when the client walked out after the service.*
- ***Checked-In Staff** – Displays the staff that checked the client in for the service.*
- ***Checked-Out Staff** – Displays the staff that checked the client out after the service.*

Buttons:

- ***Search** – To filter the walk-in appointments.*

Calculation(s): Start Date and End Date will be defaulted to today's date on page load.

Background Processes: None

21 APPOINTMENT LABELS

Navigation Path: Scheduling | Appt Mailing Labels

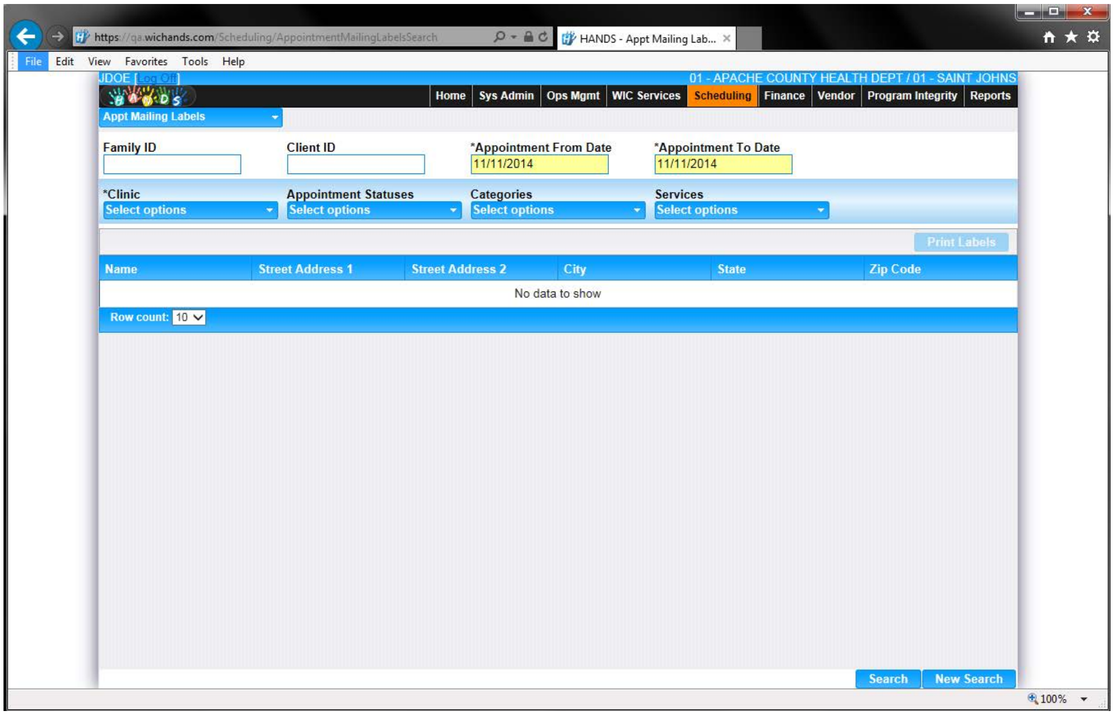


Figure 18.1: Appointment Scheduler – Appointment Labels

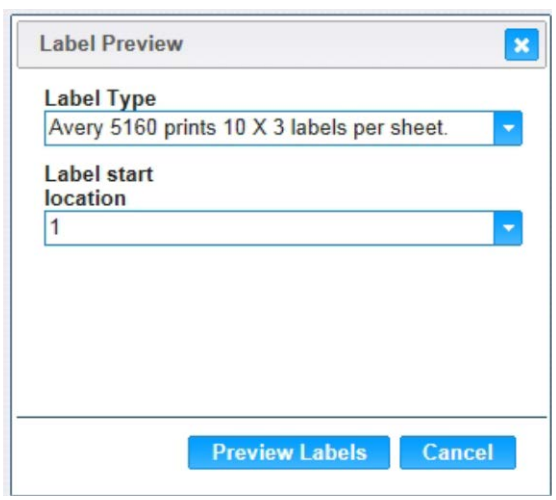


Figure 18.2: Appointment Scheduler – Print Labels

Fields:

- ***Family ID** – To search address label for a specific Family.*
- ***Client ID** – To search address label for a specific Client.*
- ***Appointment From Date, Appointment End Date** – To search address label for a specific period.*
- ***Clinic** – To search address label for Clients having appointments in specific clinic(s).*

- ***Appointment Statuses** – To search address labels for appointments in specific statuses.*
- ***Categories** – To search address label for Clients in specific categories.*
- ***Services** – To search address label for specific services of appointments.*
- ***Label Type** – To set the format of the labels that will be printed per sheet.*
- ***Label start** location – To set the starting position/location of the label print.*

<u>*Labels Grid:*</u>

- ***Name** – Displays Authorized Representative Name.*
- ***Street Address 1** – Displays Mailing Address 1 associated with the family.*
- ***Street Address 2** – Displays Mailing Address 2 associated with the family.*
- ***City** –Displays City information of the Mailing Address associated with the family.*
- ***State** –Displays State information of the Mailing Address associated with the family.*
- ***Zip Code** –Displays Zip Code information of the Mailing Address associated with the family.*

Buttons:

- ***Search** – To perform the search to get the mailing labels associated with appointments based on the entered search criteria.*
- ***New Search** – To clear the search criteria and reload the page.*
- ***Print** – To print the selected mailing labels.*
- ***Preview Labels** – To preview the labels that will be printed.*
- ***Cancel** – To close the Label Preview popup.*

Calculation(s): Appointment From Date and Appointment End Date will be defaulted to today's date on page load.

Background Processes: None