



# **Arizona Department of Health Services**

Bureau of Nutrition and Physical Activity

## **HANDS WIC System**

### **Detailed Functional Design Document**

#### **Food Package Local Agency**

**June 4, 2015**

**Version 1.2**

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## REVISION HISTORY

The chart below indicates revisions made to this document:

<u>Version</u>	<u>Name</u>	<u>Brief Description of Change</u>	<u>Published</u>
1.0	Chris Walker	Initial Draft	03-26-2015
1.1	Chris Walker	Maximus review response	05-15-2015
1.2	Chris Walker	Maximus review response	06-04-2015

# 1 OVERVIEW

This document is a detailed functional design document (DFDD) for the HANDS WIC System, concentrating on features associated with the Food Package features available at the Local Agency (LA) level.

## 1.1 Food Package LA – Features Summary

- Assignment of food packages for issuance to the clients belonging to a family.
- Issuance of food instrument(s) (FI).
- Formula replacement.
- Void / Reissue of FI's.
- Food Benefit Lookup.
- Void Unissued Food Benefits.
- Un-Void Food Benefits.
- Issuance of Farmer's Market Nutrition Program (FMNP) vouchers.
- Void / Reissue of FMNP vouchers.

## 2 FOOD PACKAGE ASSIGNMENT

The food package assignment page is used to manage food packages<sup>1</sup> for the clients associated with a family. A client must be an approved WIC participant before food package actions become available<sup>2</sup>.

Navigation Path: WIC Services | <Select family/client> | Fd Pkg | Assignment

Figure 1: Fd Pkg Assignment

Fields:

**Food Packages Selected:**

<sup>1</sup> Refer to the HANDS DFDD Food Package State document for Food Package creation details.

<sup>2</sup> Refer to the HANDS DFDD EnrollandCert document for details.

- + Add **(Add Food Package)** – Select the Add Food Package button to reveal the Add Food Package modal and manually prescribe a food package to the client.
 

*Note 1 – Food Packages must cover the entire certification period. When manually adding the food package ensure that the food packages are assigned throughout the certification period, while also taking into account if the client may experience a category change during the certification period.*

*Note 2 – The user has the option to select food packages via the Food Packages Search section instead of using the Add Food Package button. The Food Packages Search feature will automatically ensure the entire certification period is covered.*

The screenshot shows a modal window titled "Add". It contains the following fields:

- \*Food Package ID:
- \*Effective Date:
- \*End Date:
- Approved Thru:

At the bottom right of the modal are two buttons: "OK" and "Cancel".

**Figure 2: Add Food Package Modal**

*Fields:*

- Food Package ID<sup>3</sup>** – The unique identifier assigned to a food package.
- Effective Date** – The starting date on which a food instrument associated with the food package can be issued. Effective date should be later or equal to the certification start date. The effective date should be less than the end date. The effective dates of prescriptions without the disable check box checked cannot overlap.
- End Date** – The last date on which a food instrument associated with the food package can be issued.

*Note – The last date on which the food instrument may be used must be a minimum of 30 days from the first date on which it may be used, except for the participant’s first month of issuance, when it may be the end of the month or cycle for which the food instrument is valid. The last date of use for a participant’s initial-month’s food benefits may be set as the last day of another participating family member’s cycle to synchronize their cycles.*

<sup>3</sup> Refer to section 16, Food Package of the HANDS DFDD Food Package State document for details

- **Approved Thru** – The last date the qualifying food instrument is allowed to be issued. The system will display a message after assigning a food package stating that the food package requires approval before benefits can be issued. The user will not be prevented from continuing, but the system will not allow more than one month’s worth of benefits for that package being issued until approval is made. This is usually approved by a qualifying nutritionist who is assigned the proper role in HANDS. The approval date can extend beyond the cert end date. Food instruments will be issued to clients until the last day of the approved thru date if they are in an active certification.

*Note 1 – If the food item<sup>4</sup> associated with the food package is configured to require approval, the Approved Thru field is required before food instruments can be issued.*

*Note 2 – The field may only be populated by a user with the formula approval role.*

- **Food Package ID<sup>5</sup>** – The unique identifier assigned to a food package.  
*Note – The field is for display purposes only.*
- **Description** – The verbose description of the food package.  
*Note – The field is for display purposes only.*
- **Effective Date** – The starting date on which a food instrument associated with the food package can be issued.  
*Note – The field is for display purposes only.*
- **End Date** – The last date on which a food instrument associated with the food package can be issued.  
*Note – The field is for display purposes only.*
- **Approved Thru** – The last date the qualifying food instrument is allowed to be issued.  
*Note – The field is for display purposes only.*
- **Disable** – A Yes/No indicator of if the package is disabled for the client.  
*Note – The field is for display purposes only.*
- **Nutritionist** – If the prescription is approved this field is populated with the name of the nutritionist that approved the prescription.  
*Note - The HANDS system will move the previous name and approval dates to a history table for tracking purposes.*
-  **(Edit Icon)** – When selected navigation will switch to the Edit Food Package modal.

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<sup>4</sup> Refer to section 16, Food Package of the HANDS DFDD Food Package State document for details

<sup>5</sup> Refer to section 16, Food Package of the HANDS DFDD Food Package State document for details

The screenshot shows a modal window titled "Edit" with a close button in the top right corner. The window contains the following fields and controls:

- \*Effective Date:** A date input field containing "11/20/2014".
- \*End Date:** A date input field containing "11/19/2015".
- Approved Thru:** A date input field containing "11/19/2015".
- Disable:** A group of radio buttons with "Yes" selected and "No" unselected.
- Buttons:** "OK" and "Cancel" buttons at the bottom right.

**Figure 3: Edit Food Package Modal**

*Fields:*

- **Effective Date** – The starting date on which a food instrument associated with the food package can be issued. Effective date should be later or equal to the certification start date. All other records, effective date should be later or equal to the certification start date. The effective date should be less than the end date. The effective dates of prescriptions without the disable check box checked cannot overlap.
- **End Date** – The last date on which a food instrument associated with the food package can be issued.  
*Note – The last date on which the food instrument may be used must be a minimum of 30 days from the first date on which it may be used, except for the participant’s first month of issuance, when it may be the end of the month or cycle for which the food instrument is valid. The last date of use for a participant’s initial-month’s food benefits may be set as the last day of another participating family member’s cycle to synchronize their cycles.*
- **Approved Thru** – The last date the qualifying food instrument is allowed to be issued. The system will display a message after assigning a food package stating that the food package will need approval to get issued benefits. The user will not be prevented from continuing, but the system will not allow more than one month’s worth of benefits for that package being issued until approval is made. This is usually approved by a qualifying nutritionist and is assigned the proper role in HANDS. The approval date can extend beyond the cert end date. Food instruments will be issued to clients until the last day of the approved thru date if they are in an active certification.

*Note 1 – If the food item<sup>6</sup> associated with the food package is configured to require approval, the Approved Thru field is required before food instruments can be issued.*

*Note 2 – The field may only be populated by a user with the formula approval role.*

- **Disable** – A Yes/No indicator of if the package is disabled for the client.
-  **(Delete Icon)** – When selected navigation will switch to the Delete Food Package modal.

*Note – A package cannot be deleted from the client’s food package list once food instruments have already been issued.*

### Food Package Search:

Use the Food Package Search section and the “Select Packages” button to take advantage of the HANDS ability to automatically assign the chosen food packages across client category age ranges.

- **Food Package ID<sup>7</sup>** – The unique identifier assigned to a food package.
- **Food Package Description** – The verbose description of the food package.
- **Food Category<sup>8</sup>** – A drop down list populated with the available Food Groups.
- **Food ID<sup>9</sup>** – The unique ID assigned to a Food Item.
- **Food Description<sup>10</sup>** – A verbose description of the Food Package.
- **Food Sub Category<sup>11</sup>** – A drop down list populated with the available Food Sub Categories associated with the chose Food Category.
- **Show Standard** – When checked the search is filtered to show only the food packages commonly used by the client’s category code and the other search criteria entered.
- **Show All** – When checked the search provides all food packages associated with the entered search criteria, although the client category will still be taken into account

### Search Grid:

-  **(Check Box)** – A check indicates that the food package should be associated with this client. More than 1 food package may be associated with the client.
-  **(Expand)** – The Expand button allows a user to view the Food Package details listed in the search grid.
- **Food Package ID** – The unique identifier assigned to the food package record in the search grid.

*Note – The field is for display purposes only.*

- **Food Package Description** – The verbose description of the food package record in the search grid.

*Note – The field is for display purposes only.*

<sup>6</sup> Refer to section 16, Food Package of the HANDS DFDD Food Package State document for details

<sup>7</sup> Refer to section 16, Food Package of the HANDS DFDD Food Package State document for details

<sup>8</sup> Refer to section 10, Food Groups of the HANDS DFDD Food Package State document for details

<sup>9</sup> Refer to section 12, Food Items of the HANDS DFDD Food Package State document for details

<sup>10</sup> Refer to section 16, Food Package of the HANDS DFDD Food Package State document for details

<sup>11</sup> Refer to section 11, Food Subcategory of the HANDS DFDD Food Package State document for details

**Scanned Prescriptions for Food Package Approval:**

- **Scan Title** – The user defined title of the scanned prescription.  
*Note – The field is for display purposes only.*
- **Description** – The user defined description of the scanned prescription.  
*Note – The field is for display purposes only.*
- **Scanned Date** – The date the scan was performed.  
*Note – The field is for display purposes only.*
- **Scanned By** – The userid of the user that scanned the prescription.  
*Note – The field is for display purposes only.*

**Buttons:**

- **Select Packages** – Applies the food packages selected within the search grid to the client.  
*Note – In cases where the client category code will change during the certification period, the select packages button will automatically modify the Effective Date and End Date to account for the assignment of the food packages across the category change boundary.*
- **Scan Prescriptions** – Reveals the Scan Prescriptions modal.

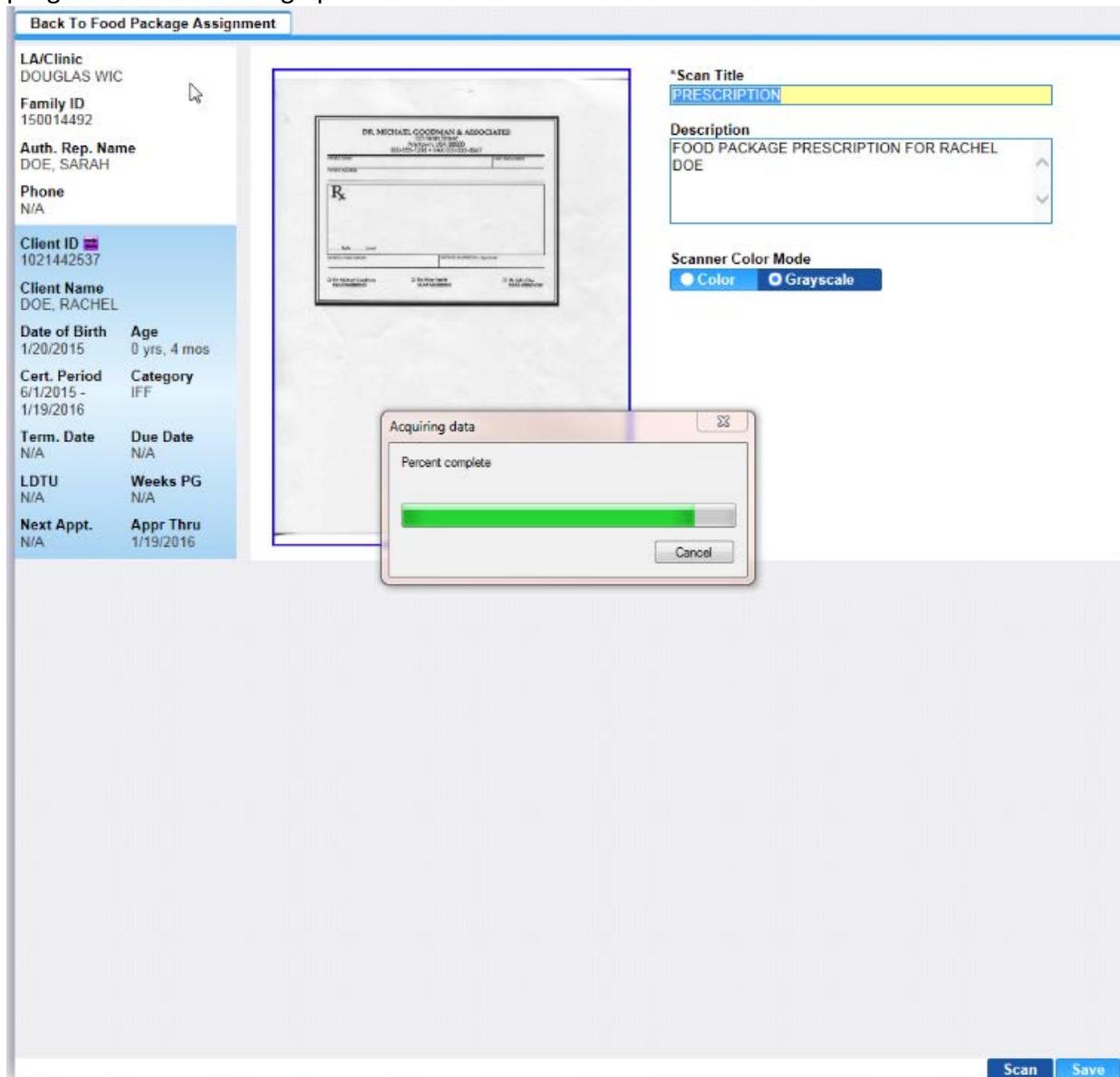
**Figure 4: Scan Prescriptions Modal**

**Fields:**

- **Scanned Image Preview Window** – The box where a scanned image will be displayed.  
*Note – If the scanned image box is framed in blue the scanner device is available. A red frame indicates the scanner device is NOT available.*
- **Scan Title** – The user defined title of the scanned prescription.
- **Description** – The user defined description of the scanned prescription.
- **Scanner Color Mode** – Choose “Color” if the scanner can support color scans and if a color scan is desired. Choose “Grayscale” if the scanner cannot support color scans, or if the desired scan is NOT color.

**Buttons:**

- **Back To Food Package Assignment** – Cancel the Scan Prescription action and returns focus back the Assignment Page. If edits have been made the Save Confirmation modal will appear.
- **Scan** – Performs the scan using the scanner configured for the PC running the HANDS web portal. A Percent Complete Modal is displayed indicating the progress of the scanning operation.



**Figure 5: Scan Image Percent Complete Modal**

- **Save** – After scanning the image, validating the scanned image is readable via the preview window and validating the Scan Title and Description fields, the Save button will save the scanned prescription. Scanned prescriptions will now

be viewable within the Scanned Prescriptions for Food Package Approval section of the Assignment tab.

The screenshot shows a web application interface for scanning prescriptions. At the top, there is a navigation link "Back To Food Package Assignment". A yellow banner at the top center displays the message "Record Saved Successfully." Below this, the interface is divided into three main sections:

- Left Panel (Patient Information):** A light blue sidebar containing the following details:
  - LA/Clinic: DOUGLAS WIC
  - Family ID: 150014492
  - Auth. Rep. Name: DOE, SARAH
  - Phone: N/A
  - Client ID: 1021442537
  - Client Name: DOE, RACHEL
  - Date of Birth: 1/20/2015, Age: 0 yrs, 4 mos
  - Cert. Period: 6/1/2015 - 1/19/2016, Category: IFF
  - Term. Date: N/A, Due Date: N/A
  - LDTU: N/A, Weeks PG: N/A
  - Next Appt.: N/A, Appr Thru: 1/19/2016
- Center Panel (Scanned Prescription):** A large white area displaying a scanned image of a prescription form. The form header reads "DR. MICHAEL GOODMAN & ASSOCIATES" and includes a patient name field with "RACHEL" visible. A large "R" is present in the prescription area.
- Right Panel (Form Fields):** Contains input fields for:
  - \*Scan Title: PRESCRIPTION
  - Description: FOOD PACKAGE PRESCRIPTION FOR RACHEL DOE
  - Scanner Color Mode: Radio buttons for Color (selected) and Grayscale.

At the bottom right of the modal, there are "Scan" and "Save" buttons.

**Figure 6: Scan Prescription Modal after Scan Operation**

- **Search** – Populates the food package search grid according to the search criteria entered.
- **Save** – Select the Save button to save pending edits.
- **Reset** – Select the Clear button to clear pending edits.

**Calculation(s):**

The system goes through each package assigned and makes sure than the following are correct

- 1.) At least one package is selected, otherwise, the user will get the following message  
*"No Packages have been selected"*

- 2.) The same package is not assigned multiple times with the same effective date, otherwise the user will get the following message:  
*"Food Package [FOOD\_PACKAGE\_ID] cannot be assigned multiple times with the same Effective date"*
- 3.) The package(s) span the entire certification period.  
*"Effective period for the food packages must cover the entire certification period"*
- 4.) If 1 or more food packages require approval, the system notifies the user that food package 'X' requires approval and if it is not approved, only 1 month of checks will be issued.
- 5.) The approval date must be greater than the effective date of the package that requires approval.  
*"The Approval Date must greater than the effective date of [TODAYS DATE]"*
- 6.) The approval date must not be more than 1 year from today's date. Otherwise the user will get the following message:  
*"The Approval Date cannot be more than 1 year from [TODAYS DATE]".* When the date is reached, a new approval can be extended.

*Background Processes:*

An entry is placed into C\_FOOD\_PACKAGE\_PRESCRIPTIONS with all the required information. A check is made on save to see if the packages assigned and category the client is in requires approval. If the food package is requires approval, the approval date is added and the REQUIRES\_APPROVAL\_FLAG is set to 'Y'. If the food package requires approval and no approval date was assigned, the user will get the following message:

*"The prescribed food package [FOOD\_PACKAGE\_ID] requires approval, when producing FIs for this participant the system will override the Pickup Interval of # and produce a single month's FIs"*

### 3 FOOD PACKAGE ISSUANCE

The food package issuance page is used to issue the food instruments associated with the prescribed food packages.

Navigation Path: WIC Services | <Select family/client> | Fd Pkg | Issuance

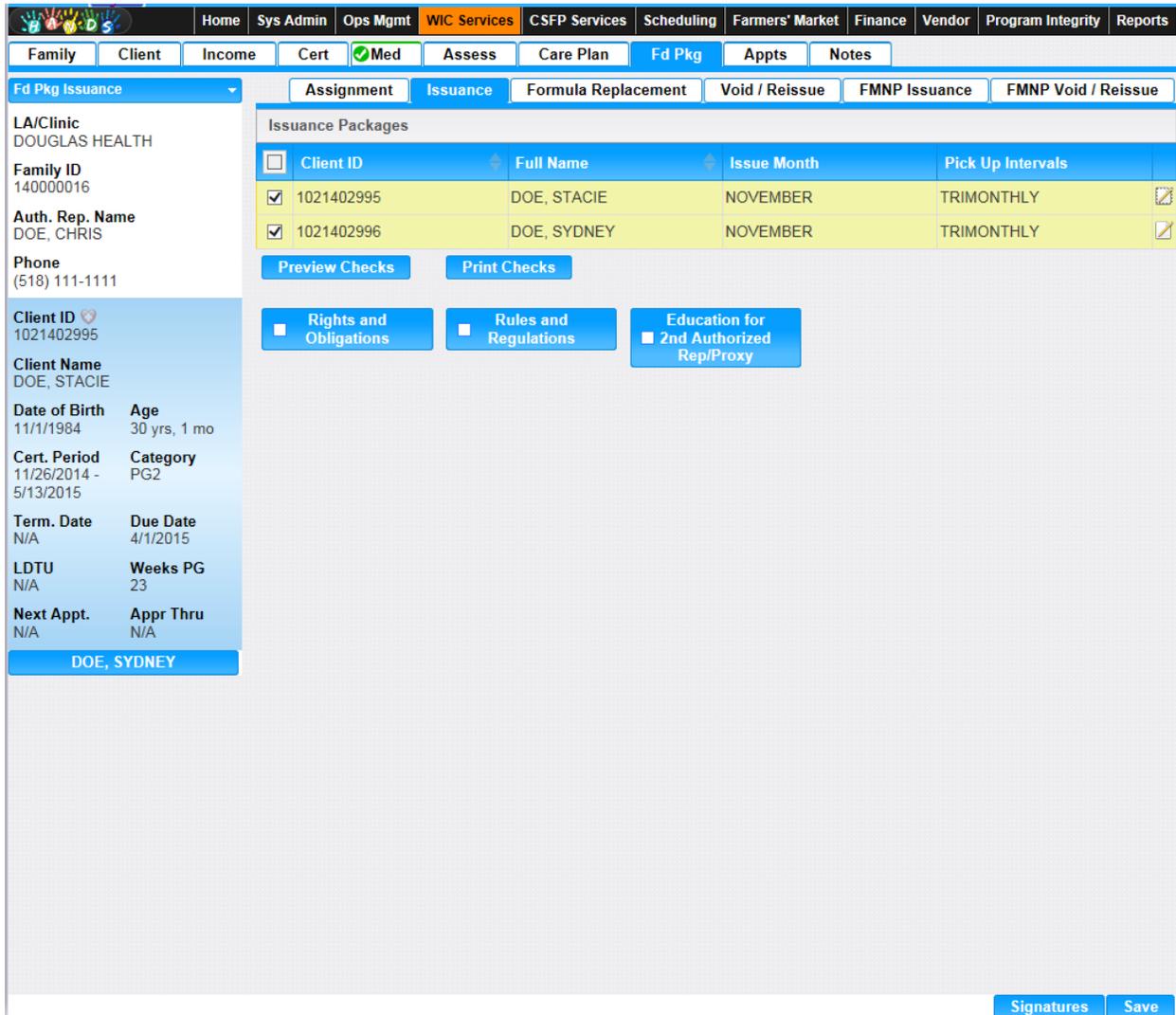


Figure 7: Fd Pkg Issuance

Fields:

**Issuance Packages:**

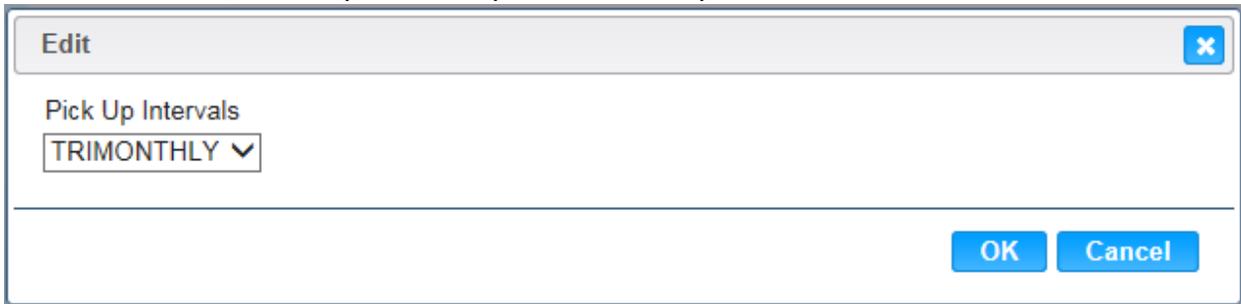
- (Check Box) – Check the box of the client(s) for which food instruments will be issued.

Note – The client’s record checkbox cannot be checked if any of the following conditions exist:

- The Clients status is not active.

- *If the client has an income record that was created 30 days prior to the last certification start date and has an income documentation code of 10, 'Forgot Documentation'. If yes, HANDS will check to see if there is a valid income record, proof of identification, and proof of residency for the authorized rep, if this is true then client can receive up to 3 months of FIs. If not, then check to see if client has already received FIs since the certification and documentation code of 10 was entered, if they have, they cannot receive any further FIs until their proof of income and/or proof of residency has been verified.*
- *If the Income Verification Code is 10, 'Forgot Documentation' and the client has already received food instruments.*
- *If the Food Package Requires Approval and has not yet been approved and Approved Thru is before today's date.*
- *If the Clients Last Issued date is after Today's date in the Issue Month selected. For example, if today's date was 9/15 and the Issue Month selected is October and the Last Issued date was 11/01, the comparison is "11/01 after 10/15".*
- *If the Clients Category Code is an Infant or Child Category and there are less than 2 medical records for the client in the first certification period and today's date is between 12 and 23 weeks after the Certification Start date and there is a qualifying Risk factor. Health Risk factors are controlled at the State Agency level and can be optionally turned on/off. When turned on, and a participant has a WIC code indicated by the State Agency as a risk, if the user attempts to check this check box the following message is displayed: "A Medical record must be collected before FIs can be produced for this participant." The exception to this rule is when WIC codes 121 (not high risk, and flagged), 113 (not high risk, and flagged), 103 (potentially high risk, and flagged) are assigned, the State Agency will have the restriction removed of having to weigh again because the system calculation requires it. During a health check the Pending Lab Codes are available to be entered in English for the anthropometric fields, Pending Lab Codes for both height and weight. The State Agency will determine how many food benefits the client will receive when this code is used. Refer to section 6, Infant/Child Medical, of the HANDS DFDD EnrollandCert document for further medical risk details.*
- *If the client's category code is pregnant category and a medical record does not exist where date created equals today's date the following message is displayed: "A Medical record must be collected before FIs can be produced for this participant."*
- *If the clients category code is an Infant category and today's date is between 20 and 32 weeks after the clients certification start date and a medical record does not exist where the date created is between 20 and 32 weeks after the certification start date the following message is displayed: "A Medical record must be collected before FIs can be produced for this participant."*
- *For infants and C1 (excluding foster kids), system validates to check for Breastfeeding information. If they had previously answered "Yes", then it checks to see whether they have entered an answer again today.*

- For infants and C1, system validates to check they have immunization information entered.
- If the client has received checks for future months and their next subsequent issue month last date is more than 3 months + 15 days from today.
- If the client has received check s for future months and their next subsequent issue month last date is past their cert end date.
- **Client ID**<sup>12</sup> – The unique ID assigned to the Client.  
*Note – The field is for display purposes only.*
- **Full Name** – The full name of the client.  
*Note – The field is for display purposes only.*
- **Issue Month** – Displays the month for which the next food instruments will be issued.  
*Note – The field is for display purposes only.*
- **Pick Up Intervals** – Displays the currently selected pick up interval.  
*Note 1 – If approval is required for the food package and the pickup interval code is greater than monthly and the approval has not been performed, HANDS will display the following message to the user as a reminder that the pickup interval will be overridden and FIs will be produced for only the first month: "The prescribed food package requires approval, when producing FIs for this participant the system will override the Pickup Interval of # and produce a single month's FIs.*  
*Note 2 – The field is for display purposes only.*
-  **(Edit)** – Displays the edit pick up interval modal for the chosen record. The valid values are, Monthly, Bimonthly and Trimonthly.



**Figure 8: Edit Pick Up Interval Modal**

- **Preview Checks** – Displays the preview food instruments modal associated with the food instruments for the selected client(s).

<sup>12</sup> Refer to section 2, Family Information Page, of the HANDS DFDD EnrollandCert document for details.

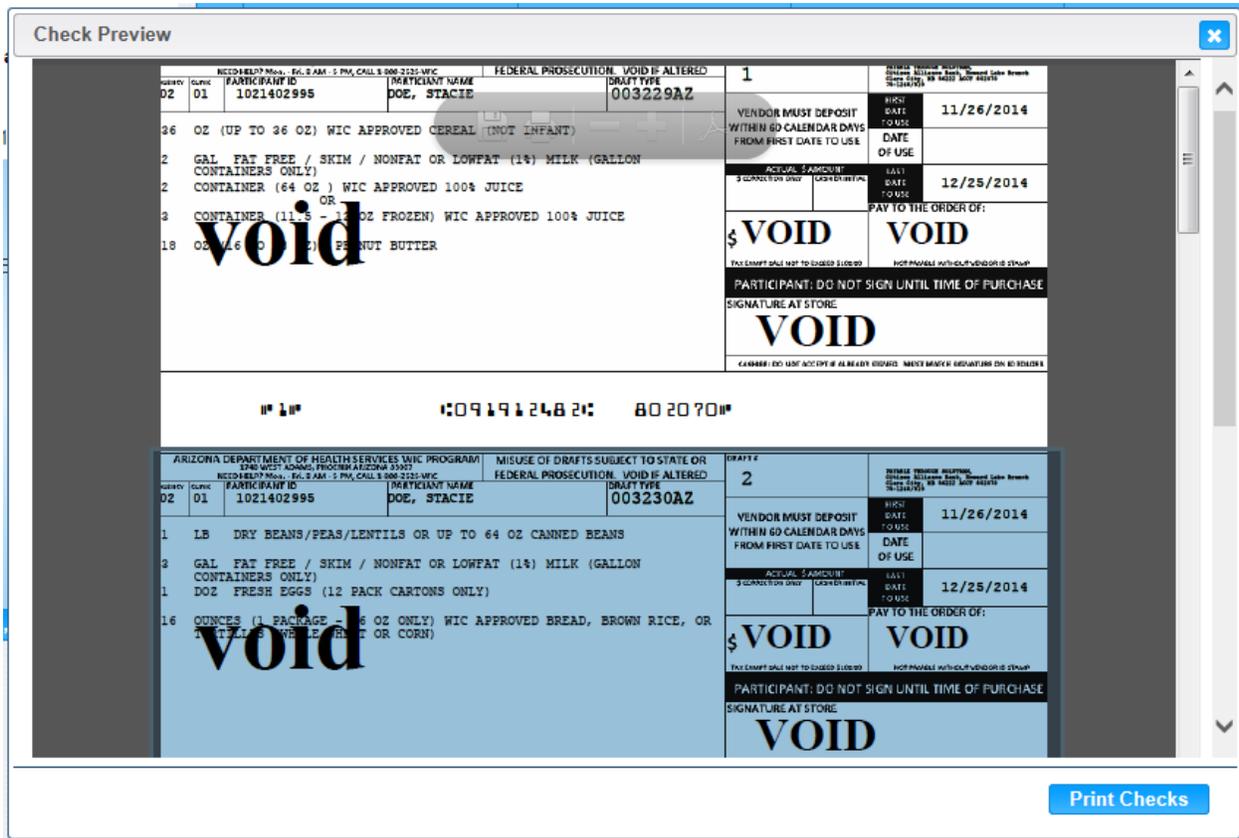


Figure 9: Preview Food Instruments Modal

-  (Close) – Close the food instrument preview modal.
- **Print Checks** – Print the food instruments viewed in the food instrument preview modal.
- **Print Checks** – Prints the food instruments associated with the selected client(s).
- **Rights and Obligations** – The user checks this box to confirm the Rights & Obligations form. Checking this box also generates a note in the Notes table.
- **Rules and Regulations** – The user checks this box to confirm the Rules & Regulations form. Checking this box also generates a note in the Notes table.
- **Education for 2<sup>nd</sup> Authorized rep/Proxy** – The user checks this box to confirm the Education for Second Authorized Representatives or Proxies. Checking this box also generates a note in the Notes table.

Buttons:

- **Signatures** – Displays the signature modal.

**Figure 10: Signature Modal**

- **Signature Type** – Indicates what the signature is in response to.  
*Valid Values:*
  - *Rights and Obligations*
  - *2<sup>nd</sup> AR Rights and Obligations*
  - *Receipt of FB**Note – Receipt of FB is only available if FBs are being issued.*
- **Family ID** – The Family ID.
- **Client ID** – Choose the client who will sign from the dropdown list.
- **Comment** – A free form text field for comments.
- **Save** – Save edits to the Food Package Issuance record.

*Calculation(s): None*

*Background Processes:*

When the record is saved via the “Save” Button, HANDS will perform the following processing in the background:

1. If the client is an Out of State Transfer, the system will automatically set the clients record as active allowing the issuance of food instruments. If the client is NOT an Out of State Transfer, then all of the following conditions must be met before HANDS will set the client’s record to Active, allowing the issuance of food instruments. If any of the conditions are not met the system leaves the participant’s status the same.
  - **Valid Certification Period**<sup>13</sup> – Certification record where Today’s date is between the clients Cert Start Date and the clients Cert End Date.
  - **Valid Anthropometric Medical Record**<sup>14</sup> – Where the anthropometric medical data date is greater than or equal to the clients certification start date. The date

<sup>13</sup> Refer to section 5, Certification Action Page, of the HANDS DFDD EnrollandCert document for details.

<sup>14</sup> Refer to section 6, Infant/Child Medical, of the HANDS DFDD EnrollandCert document for details.

- entered cannot be in the future, before the Clients date of birth, or more than 60 days in the past.
- **Valid Bloodwork Medical Record**<sup>15</sup> – Where the bloodwork medical record is greater than or equal to the clients certification start date. The date cannot be in the future, before the Clients date of birth, or more than 90 days in the past.
  - **Assessment Record** – The assessment record date is greater than or equal to the clients certification start date.
  - **One or More Risk Factors Assigned** – At least one risk factor associated with the clients certification start date.
  - **Voter Registration Status**<sup>16</sup> – A response to the client’s family’s, “Register to Vote?” question.
2. The Food Package Prescription Effective Date and End Date are validated against the following criteria:
    - Prescription dates cannot overlap another prescription’s dates (disabled prescriptions are not validated). If the dates overlap, the “Effective periods for the Food Packages cannot overlap” message is displayed.
    - One or more prescriptions must be prescribed to a participant for each certification period, and the prescription dates must span the entire certification period without any date gaps or overlaps. (Disabled prescriptions are not validated). If the dates do not span the entire certification period the, “Effective periods for the Food Packages must cover the entire certification period” message is displayed.
    - If formula approval is required, a user with the formula approval role has entered a value in the Approved Thru Date field.
  3. HANDS will update the new Approvals History table (U\_C\_Food\_Package\_Approvals) with the values of the previous and display the new Approved By userid. The Nutritionist field is then disabled and cannot be updated.
  4. If the food package Requires Approval and the Approval check box is not checked HANDS will not allow the issuance of Food Instruments after the Approved Thru date has expired. After FIs are produced, HANDS updates the Approved Thru date to Today's date to ensure that a participant that comes in prior to their next Scheduled Day is not issued FIs for the following month until the food package has been approved. A client needing food package approval that has not yet obtained it and is not eligible for FIs, will not impact the issuance of other eligible family members.

The state agency is able to determine the number of months of FI’s that can be issued when the Pending lab code is used for blood work. At the time of certification, if a hemoglobin value is required, staff may use appropriate pending lab code to issue FI’s. After 90 days, the same pending lab code will not be an acceptable code based on the recurrence factor<sup>17</sup> and FIs cannot be printed unless another pending lab code or the actual hemoglobin/hematocrit value is entered.

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<sup>15</sup> Refer to section 6, Infant/Child Medical, of the HANDS DFDD EnrollandCert document for details.

<sup>16</sup> Refer to section 2, Family Information Page, of the HANDS DFDD EnrollandCert document for details.

<sup>17</sup> Refer to section 15.17, Pending Lab Codes, of the HANDS DFDD EnrollandCert document for details.

The client will not receive any more food instruments if any of the following conditions are true:

- If the client has received checks for future months and their next subsequent issue month last date is more than 3 months + 15 days from today.
- If the client has received checks for future months and their next subsequent issue month first date is past the certification end date.
- If the client has been prescribed a package that requires approval and either the approval doesn't exist or the approval end date is earlier than the next check's first date to use and client has already received at least 1 month of checks.
- If the client has forgotten documentation for either income, identity proof or address proof, and they have already received 1 month of checks.
- Client's most recent medical record has a pending lab code and the allowed number of months of checks have already been issued to the client.
- Postpartum clients whose infants are older than 6 months.
- IEN clients who are less than 6 months old.
- Breastfeeding or postpartum women have no infant linked and there is no reason associated as well.
- Infants have no mom linked and there is no reason associated as well.
- No pickup interval has been set.

**Family pick up date:**

Hands issues checks based on the concept of Family pick up date. Each HANDS family will have a pickup date associated with it. If a new family is added today and certified, then they get today's date as the family pick up date. This family pick up date will remain constant while there are active clients in the family or active checks. However, if none of the clients in the family have an active certification and none of the checks are still active (last date to use on checks is greater than today), and a new certification is created, then the family pick up date would be reset to today.

**Starter package:**

A starter package is an additional package alongside the regular issue month package issued to the client to cover the following scenarios:

1. When a new certification is started and if the family FDTU for the issue month is in the future, then the client will get a starter package to cover the period from today to the day before FDTU.
2. For a client whose issuance is being synchronized with the rest of the family members and the family FDTU for the issue month is in the future and as a result there is a gap of more than 2 days from the greater of last issued check LDTU/today and the next issue month FDTU, then starter package will be issued from greater of last issued check LDTU/today and the day before FDTU.

**Prorated package:**

A prorated package is reduced number of checks issued to cover the shortened issuance period which can happen in the following scenarios:

1. If the agency has late pickup proration enabled and the client comes to pick up their issue month checks after the FDTU, then checks will be reduced depending on the number of days remaining in the issuance period.
2. If the client has a new certification and the family FDTU for the issue month was in the past, then the client will get a prorated package from cert start date to LDTU of the issue month so their issuances can be synchronized

When the user selects a client id and clicks on the preview button, system processes the following steps:

1. System identifies the starter package and late pick up proration flags.
2. Next, it will calculate client's next issuance month FDTU based on the family FDTU while also identifying if the client is eligible for an additional starter package or whether they will be receiving full or prorated package.
3. Then system loops through each of the pickup interval month it needs to print and does the following:
  - a. If the LDTU for the issuing month is more than 3 months + 15 days from today then system will stop issuing any more checks today.
  - b. If the client is IEN and is less than 6 months old on the FDTU of the issuing month, system will move on to the next interval month.
  - c. Next, system identifies if the client is C1 today but would have been an infant on the FDTU, then it will try to issue the infant food package. So it will select the food package prescription record that was effective on the FDTU. Otherwise for every other scenario, system issues the food package that is effective today for the current issue month or effective on the FDTU for any future months.
  - d. If system is unable to find an active package as stated above, then it will stop issuing any checks for that client and displays an error message:  
xxxxxxx: The food package OR pick-up day (must be Current Day) is not valid for the month of zzzzzz. No FIs will be generated for that month.
  - e. If the effective food package for the client has been marked as inactive, then it will stop issuing any checks for that client and displays an error message:  
xxxxxxx : Food Package yyyyyyy has been marked as inactive. No FI's will be generated for zzzzz.
  - f. If the client is PN+ category and the linked infant is more than 6 months old on FDTU, then no more checks will be printed and system displays the message:  
xxxxxxx : Postpartum women whose infant(s) are category IPN+ and more than 6 months of age are no longer eligible to receive food instruments as a PN+ category
  - g. If client's cert end date is less than FDTU or the food package approval end date is less than FDTU or if the client's active package effective end date is less than FDTU, then no more checks will be printed and system displays the message:  
xxxxxxx : The food package OR cert end date OR approval end date is not valid for the month of yyyyyy. No FIs will be generated for that month for client id xxxxxxxx.

- h. If client's effective food package requires approval and approval end date is null or less than today, then system validates whether they have received any non-voided checks for that food package prescription.
    1. If they have already received checks, then no more checks will be printed and system displays the message:  
xxxxxxx: This participant's food package requires approval. Until approved, client xxxxxxx is not eligible to receive FI's.
    2. Otherwise, if they haven't received checks and their pickup interval month was more than 1 month, then system will allow one month of checks to be printed and displays the message:  
The prescribed food package xxxxxxxx requires approval, when producing benefits for Client ID xxxxxxxx the system will override the Pickup Interval and produce a single month of benefits.
  - i. If the proration flag was identified earlier to be true, then system calculates the number of checks that needs to be removed.
  - j. Next, based on the active food package identified for the issue month, system will determine the FI types associated with the food package. For non max foods, these FI types will be present in I\_FOOD\_PACKAGE\_FI\_TYPES table while for max foods, they will be present in I\_FP\_FORM\_FI\_TYPES. Each of these FI types gets translated into a check being printed.
  - k. If the system is unable to find the FI types, then it stops printing the checks and displays a message:  
No Food Types were found for food package xxxxxxxx
  - l. If FI Types were found, system will loop through each of them and does the following:
    1. If the food package had opted to use alternate food, then system identifies the alternate FI type code and uses it for printing checks
    2. If the age of the client is less than 6 months and the current FI type is a non-formula food, then system skips the current FI type and moves on to the next FI type
    3. Next, system identifies if the current FI type code contains CVV and if it does then it calculates the CVV value for the current client category and uses it for the allocation amount. Once the CVV value is calculated, next it identifies the FI type code for that CVV value and replaces the current processing FI type code while printing checks.
    4. Once all the values are processed for the current FI type, system inserts the record into I\_TEMP\_FIS table
  - m. Once all the FI type records are processed for the current interval, system increments the issue month and FDTU by a month and moves on to the next pickup interval
4. Once all the pickup intervals are processed and the food instrument records are created in I\_TEMP\_FIS table, HANDS will use that data to generate the check stubs for preview purposes.

However, when user clicks the print button, all the above steps are first completed as in preview button click and then the system acquires a lock on the procedure execution for that clinic. Once the lock is acquired, system identifies the next serial number to be used for printing checks. Then system loops through each of the records created in I\_TEMP\_FIS and inserts them into I\_FOOD\_INSTRUMENTS table with the serial number being replaced with the actual check serial number. Once all the records are copied over from I\_TEMP\_FIS, system then updates the I\_FI\_INVENTORIES table LAST\_FI\_NO\_USED column with the last printed serial number and then released the lock that was acquired earlier. Then system removes the above processed checks from I\_TEMP\_FIS.

Finally, system checks to see if the available serial numbers is below 5% and will display a message indicating the same. Also, system will mark all the appointments as attended for the clients who received the checks.

When the Print Button is pressed the system attempts to lock the I\_FI\_INVENTORY table to obtain the next set of serial numbers. If the lock cannot be obtained because another user is printing FIs, the system will display a message indicating the conflict. If this message is displayed the user has two options, let the system continue to attempt to lock the table (Default Option) or cancel the request and then re-attempt to print. When the lock is obtained the system verifies that there are enough serial numbers available to the clinic to produce all of the FIs that are to be printed, (Available Serial Numbers > Number of FIs (See below for calculations). If there are not enough FIs the system displays the following message "There are not enough available serial numbers to print checks at this time. Please notify your system administrator to assign additional serial numbers to this clinic". If there are enough serial numbers available the system performs the following process (1 - 9):

1. For each participant that FIs are being produced: If C\_INCOMES.IV\_INC\_VERIF\_CODE in the participant's record is 'Forgot Documentation' the system sets C\_INCOMES.RECEIVED\_FIS to 'Y'. When the user enters the screen the following message is displayed 'Client forgot documentation. Client will receive only one month of checks until income is documented.' AAS\_APPT\_CLIENTS.AS\_AS\_STATUS\_CODE is set to 'K', AAS\_CLASS\_FAMILIES.AS\_AS\_STATUS\_CODE is set to 'K', C\_CLIENT\_SERVICES.ATS\_ATTEND\_STATUS\_CODE is set to 'K' and AAS\_APPOINTMENTS.AS\_AS\_STATUS\_CODE is set to 'K' (Kept) for any appointments for this participant scheduled where AAS\_APPOINTMENTS.CFEU\_FAMILY\_ID = C\_FAMILY\_ECONOMIC\_UNITS.FAMILY\_ID and TO\_CHAR(AAS\_APPOINTMENTS.CD\_CALENDAR\_DATE,'MMDDYYYY') = TO\_CHAR(SYSDATE,'MMDDYYYY') and AAS\_APPOINTMENTS.ATS\_ATTEND\_STATUS\_CODE = 'P'. The number of issuance months is then determined by the C\_CLIENTS.PUI\_PICKUP\_INTERVAL\_CODE (1, 2, 3, ...) and reduced by 1 for each Pickup Date (see below) of each future issuance month that is after C\_CERTIFICATIONS.CERT\_END\_DATE.

*Note – Forgot Documentation message will not display for a Client who has forgot income documentation, is receiving a starter package, and has been newly added to a Family that has a member eligible for issuance with valid income documentation.*

2. For each participant and month of issuance the system selects the C\_FOOD\_PACKAGE\_PRESCRIPTIONS record where the Pickup Date (See Below for calculation) is between C\_FOOD\_PACKAGE\_PRESCRIPTIONS.EFFECTIVE\_DATE and C\_FOOD\_PACKAGE\_PRESCRIPTIONS.END\_DATE and C\_FOOD\_PACKAGE\_PRESCRIPTIONS.DISABLE\_FLAG is 'N'.
3. For each C\_FOOD\_PACKAGE\_PRESCRIPTIONS record selected: If C\_FOOD\_PACKAGE\_PRESCRIPTIONS.REQUIRES\_APPROVAL is 'P', 'N', or 'B' and C\_FOOD\_PACKAGE\_PRESCRIPTIONS.APPROVED\_BY is NULL and C\_FOOD\_PACKAGE\_PRESCRIPTIONS.APPROVAL\_END\_DATE is after Today's date, the system updates C\_FOOD\_PACKAGE\_PRESCRIPTIONS.APPROVAL\_END\_DATE to Today's date to ensure that the participant does not receive additional months of FIs until their food package receives approval.
4. For each I\_FOOD\_PACKAGES record selected, derived from C\_FOOD\_PACKAGE\_PRESCRIPTIONS.IFP\_FOOD\_PACKAGE\_ID: the system determines the I\_FOOD\_INSTRUMENT\_TYPES records to be printed by selecting the I\_FOOD\_PACKAGE\_FI\_TYPES records where I\_FOOD\_PACKAGES.FOOD\_PACKAGE\_ID = I\_FOOD\_PACKAGE\_FI\_TYPES.IFP\_FOOD\_PACKAGE\_ID and I\_FOOD\_PACKAGE\_FI\_TYPES.IFIT\_FI\_TYPE\_CODE = I\_FOOD\_INSTRUMENT\_TYPES.FI\_TYPE\_CODE.

OR

For each I\_FOOD\_PACKAGES record selected, derived from C\_FOOD\_PACKAGE\_PRESCRIPTIONS.IFP\_FOOD\_PACKAGE\_ID: the system determines the I\_FOOD\_INSTRUMENT\_TYPES records to be printed by selecting the I\_FP\_FORM\_FI\_TYPES records where the I\_FOOD\_PACKAGES.FOOD\_PACKAGE\_ID = I\_FP\_FORM\_FI\_TYPES.IFP\_FOOD\_PACKAGE\_ID and C\_CLIENTS.CAT\_CATEGORY\_CODE = I\_FP\_FORM\_FI\_TYPES.ICG\_CAT-CATEGORY\_CODE and MONTHS\_BETWEEN(I\_FOOD\_INSTRUMENTS.FIRST\_DATE\_TO\_USE, C\_CLIENTS.BIRTH\_DATE) between I\_FP\_FORM\_FI\_TYPES.ICG\_AR2\_BEGIN\_MONTH and I\_FP\_FORM\_FI\_TYPES.ICG\_AR2\_END\_MONTH and C\_CERTIFICATIONS.PLUS\_FLAG = I\_FP\_FORM\_FI\_TYPES.ICG\_PLUS\_FLAG.

5. For each I\_FOOD\_INSTRUMENT\_TYPES record selected: The system inserts a record into the I\_FOOD\_INSTRUMENTS table and sets the following fields:
  - o SERIAL\_NUMBER I\_FI\_INVENTORY.LAST\_FI\_NO\_USED + 1
  - o COMPLIANCE\_BUY\_FLAG C\_CLIENTS.COMPLIANCE\_FLAG
  - o FIRST\_DATE\_TO\_USE Later of SYSDATE and Pickup Date (See Calculation Below)
  - o LAST\_DATE\_TO\_USE PICKUP DAY + F\_CONTROLS.REDEMPTION\_PERIOD - 1
  - o ISSUE\_DATE SYSDATE
  - o MAXIMUM\_AMOUNTF\_CONTROLS.FI\_STD\_MAX\_AMT (If I\_FOODS.IF\_TYPE = 'STD' for all foods on the food instrument)
  - o MAXIMUM\_AMOUNTF\_CONTROLS.FI\_EXCEP\_MAX\_AMT (If I\_FOODS.IF\_TYPE = 'ISF' for any foods on the food instrument)
  - o FORMULA\_RETURN\_FLAG 'N'

- MISSING\_ISSUANCE\_FLAG 'N'
  - RECEIVED\_BY\_STATE 'N'
  - PRIORITY\_AT\_ISSUANCE C\_CLIENTS.CP2\_ID
  - IDIS\_DISPOSITION\_CODE 2 (Issued)
  - ISSUE\_METHOD 'O' (if C\_CLIENTS.COMPLIANCE\_FLAG = 'N')
  - ISSUE\_METHOD 'C' (if C\_CLIENTS.COMPLIANCE\_FLAG = 'Y')
  - STALE\_DATE FIRST\_DATE\_TO\_USE +  
F\_CONTROLS.STALE\_DATE\_PERIOD
  - IFIT\_FI\_TYPE\_CODE I\_FOOD\_INSTRUMENT\_TYPES.FI\_TYPE\_CODE
  - CFPP\_IFP\_FOOD\_PACKAGE\_ID
    - C\_FOOD\_PACKAGE\_PRESCRIPTIONS.IFP\_FOOD\_PACKAGE\_ID
  - CFPP\_EFFECTIVE\_DATE  
C\_FOOD\_PACKAGE\_PRESCRIPTIONS.EFFECTIVE\_DATE
  - CC\_CLIENT\_ID C\_CLIENTS.CLIENT\_ID
6. For each I\_FOOD\_INSTRUMENT\_TYPES record selected where  
I\_FOOD\_INSTRUMENT\_FOODS.IF\_FOOD\_ID <> ENV('CVV\_ID'): The system prints the  
I\_FOODS.DESCRPTION1 || I\_FOODS.DESCRPTION2 || I\_FOODS.DESCRPTION3 ||  
I\_FOODS.DESCRPTION4 on the FI for each food found in  
I\_FOOD\_INSTRUMENT\_FOODS.IF\_FOOD\_ID where  
I\_FOOD\_INSTRUMENT\_FOODS.IFIT\_FI\_TYPE\_CODE = the  
I\_FOOD\_INSTRUMENT\_TYPES.FI\_TYPE\_CODE selected.  
Else  
Get I\_CASH\_VALUES.CASH\_VALUE where  
I\_FOOD\_INSTRUMENTS.CAT\_CATEGORY\_CODE =  
I\_CASH\_VALUES.CAT\_CATEGORY\_CODE and  
I\_FOOD\_INSTRUMENTS.FIRST\_DATE\_TO\_USE > I\_CASH\_VALUES.START\_DATE and  
C\_W\_HEALTHS.MULTIPLE\_BIRTHS\_FLAG = I\_CASH\_VALUES.MULTIPLES\_FLAG.
- Replace "VOUCHER\_AMOUNT in F\_CONTROLS.CVV\_DESC with I\_CASH-  
VALUES.CASH\_VALUE. If I\_FOOD\_PACKAGES.DESCRPTION includes 'CANNED CVV' Then  
'FRESH' in F\_CONTROLS.CVV\_DESC is replaced with the value in  
ENV('HOMELESS\_DESC').
7. The system then updates I\_FI\_INVENTORY.LAST\_FI\_NO\_USED to  
I\_FI\_INVENTORY.LAST\_FI\_NO\_USED + (Number of FIs produced) where  
I\_FI\_INVENTORY.OU\_SEQ\_ID = C\_FAMILY\_ECONOMIC\_UNITS.OU\_SEQ\_ID for the  
participant.
8. The O\_ORGANIZATIONAL\_UNITS.EXPECTED\_STOCK\_INVENTORY is decremented by the  
Stock Used (See Below).

9. If the Available Serial Numbers (See Below)  $\leq 5\%$  of F\_CONTROLS.SMALL\_CLINIC\_FIS, F\_CONTROLS.MED\_CLINIC\_FIS, or F\_CONTROLS.LARGE\_CLINIC\_FIS for the O\_ORGANIZATIONAL\_UNITS.ORG\_SIZE, then the following message is displayed prior to printing FIs "The available serial numbers are down to 5%, notify the system administrator to issue additional serial numbers to this clinic."

The Number of Available Serial Numbers in the Clinic is calculated by:

Available Serial Numbers =  $SUM(I\_FI\_INVENTORY.END\_NO - I\_FI\_INVENTORY.LAST\_FI\_NO\_USED)$  for all I\_FI\_INVENTORY records for the clinic defined as C\_FAMILY\_ECONONOMIC\_UNITS.OU\_SEQ\_ID.

The Number of FIs to be produced is calculated by:

Number of FIs =  $SUM(\text{Food Package FIs for each participant that FIs are being produced for})$ .

The Number of FIs to be produced by the food package is calculated by:

If F\_CONTROLS.PRORATION\_FLAG = 'N' then

Food Package FIs =  $I\_FOOD\_PACKAGES.NO\_OF\_INSTRUMENTS + (I\_FOOD\_PACKAGES.NO\_OF\_INSTRUMENTS \text{ for each subsequent issuance month})$ .

Else If F\_CONTROLS.PRORATION\_FLAG = 'Y', and the Days Late (See above calculation) is between I\_PRORATIONS.MINIMUM\_DAYS\_LATE and

I\_PRORATIONS.MAXIMUM\_DAYS\_LATE where

$I\_FOOD\_PACKAGES.NO\_OF\_INSTRUMENTS = I\_PRORATIONS.NO\_OF\_INSTRUMENTS$  and I\_PRORATIONS.FORMULA\_FLAG = 'Y' (if the Food Package contains any Formula, See Below for Determination) or I\_PRORATIONS.FORMULA\_FLAG = 'N' (if the Food Package does not contain any Formula)

Food Package FIs =  $I\_PRORATIONS.PRORATED\_NO\_FI$ . For the first issuance month +  $I\_FOOD\_PACKAGES.NO\_OF\_INSTRUMENTS$  for each subsequent issuance month.

The Number of Sheets of Stock used is determined by:

Stock Used =  $((\text{Number of FIs} + 1 \text{ (For the Stub that is printed)}) / 3) + 1$  if there is a remainder.

The serial number printed on the FI is determined by:

If multiple I\_FI\_INVENTORY records exist for the Clinic the system uses the  $MIN(I\_FI\_INVENTORY.START\_NO)$  record where  $I\_FI\_INVENTORY.LAST\_FI\_NO\_USED$  is less than  $I\_FI\_INVENTORY.END\_NO$  for the Clinic.

Serial Number =  $I\_FI\_INVENTORY.LAST\_FI\_NO\_USED + 1$

When printing serial numbers on the FI paper stock, the system does not print leading zeroes. The Food Instruments are printed in Serial Number order.

During the End of Day process, in the EC4\_ST\_CLIENT\_SUM.SQL script, the system sets the C\_STATE\_CLIENT\_SUMMARY.LAST\_ISSUED field to the MAX(I\_FOOD\_INSTRUMENTS.FIRST\_DATE\_TO\_SPEND) where I\_FOOD\_INSTRUMENTS.IDIS\_DISPOSITION\_CODE is not 1 (Printed, Not Issued) or 3 (Voided) and C\_STATE\_CLIENT\_SUMMARY.LAST\_CASHED field to MAX(I\_FOOD\_INSTRUMENTS where I\_FOOD\_INSTRUMENTS.IDIS\_DISPOSITION\_CODE is 4 (Redeemed) or 5 (Rejected)).

## 4 FOOD PACKAGE FORMULA REPLACEMENT

The Formula Replacement module allows a user to issue a replacement formula for already issued food instruments. If the intention is to replace the formula food item, the user should first set the original food package to inactive and assign the newly desired food package via the Food Package Assignment module<sup>18</sup>.

Navigation Path: WIC Services | <Select family/client> | Fd Pkg | Formula Replacement

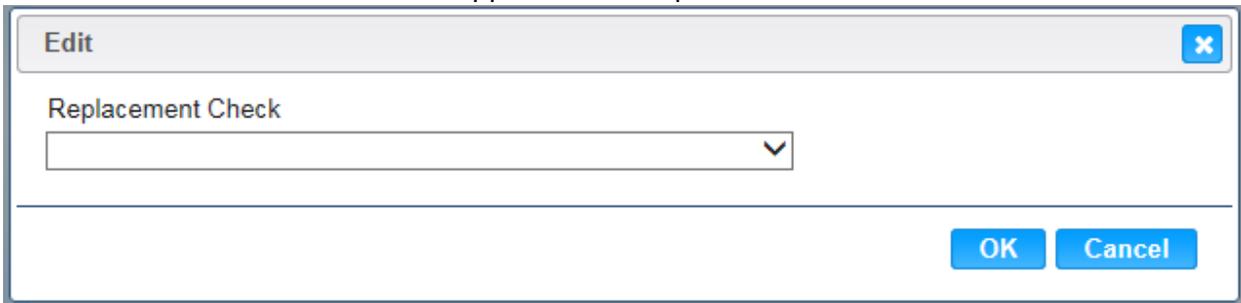
Serial Number	Preview Check	First Date To Use	Last Date To Use	Replacement Check	Preview Check
<input type="checkbox"/> 0072026015	Preview Check	12/1/2014	12/31/2014		Preview Check
<input type="checkbox"/> 0072026017	Preview Check	12/1/2014	12/31/2014		Preview Check
<input type="checkbox"/> 0072026016	Preview Check	12/1/2014	12/31/2014		Preview Check

Figure 11: Food Package Formula Replacement

Fields:

<sup>18</sup> Refer to section 2, Food Package Assignment for details.

-  **(Check Box)** – Check the box of the check(s) for which a formula food item replacement Check will be issued.
- **Serial Number** – The unique serial number assigned to the formula food instrument (check).  
*Note – The field is for display purposes only.*
- **Preview Check** – Allows the user to preview the check that was previously issued.
- **First Date To Use** – The first date the check may be used.  
*Note – The field is for display purposes only.*
- **Last Date To Use** – The last date the check may be used.  
*Note – The field is for display purposes only.*
- **Replacement Check** – The formula food item that will appear on the replacement check.  
*Note – The field is for display purposes only.*
- **Preview Check** – Allows the user to preview the check that will replace the original check.
-  **(Edit)** – Displays the Edit Replacement Check modal, allowing the user to select the formula food item that will appear on the replacement check.



**Figure 12: Edit Replacement Check Modal**

*Fields:*

- **Replacement Check** – A drop down list populated from the food packages prescribed to the client via the Food Package Assignment module<sup>19</sup>.

*Buttons:*

- **OK** – Proceed with the selected formula food item and return to the Formula Replacement page in order to review the details and issue the formula replacement check.
- **Cancel** – Clear the Replacement Check selection and return to the Formula Replacement page.

*Buttons:*

- **Replace Checks** – The Replace Checks button will print replacement formula food item check(s) for the records selected.

<sup>19</sup> Refer to section 2, Food Package Assignment for details.

- **Reset** – The Reset button will clear all edits and replacement formula food item check(s) will not be printed.

*Calculation(s): None*

*Background Processes:*

Upon save, the following validations are made:

- 1.) At least one check is selected to be replaced
- 2.) Each check being replaced has a food package selected to replace the existing one

The system automatically sends the Void Reason to D(also known as REPLACED/FOOD PACKAGE CHG) along with the serial number that is being replaced to the database for processing the new check.

## 5 FOOD PACKAGE VOID/REISSUE

Navigation Path: WIC Services | <Select family/client> | Fd Pkg | Void/Reissue

Home Sys Admin Ops Mgmt **WIC Services** CSFP Services Scheduling Farmers' Market Finance Vendor Program Integrity Reports

Family Client Immun Income Cert Med Assess BF Surv Care Plan **Fd Pkg** Appts Notes

Void / Reissue Assignment Issuance Formula Replacement **Void / Reissue** FMNP Issuance FMNP Void / Reissue

LA/Clinic  
DOUGLAS HEALTH

Family ID  
14000026

Auth. Rep. Name  
DOE, PAIGE

Phone  
(111) 111-1111

Client ID  
1021403014

Client Name  
DOE, BABYPAIGE

Date of Birth Age  
11/15/2014 0 yrs, 0 mos

Cert. Period Category  
12/1/2014 - 11/14/2015 IPN+

Term. Date Due Date  
N/A N/A

LDTU Weeks PG  
12/31/2014 N/A

Next Appt. Appr Thru  
N/A 11/15/2015

DOE, PAIGE P

\*Reasons  
[Dropdown]

Food Benefit List

<input type="checkbox"/>	Serial Number	First Date to Use	Last Date to Use	Status	Preview Check
<input type="checkbox"/>	0072026017	12/01/2014	12/31/2014		Preview Check
<input type="checkbox"/>	0072026019	12/01/2014	12/31/2014		Preview Check
<input type="checkbox"/>	0072026020	12/01/2014	12/31/2014		Preview Check

<< < > >> Row count: 10 Showing 1-3 of 3

Void/Replace Entire Month Void/Reissue Selected Checks Void Selected Checks

Figure 13: Food Package Void/Reissue

Fields:

- **Reasons**<sup>20</sup> – Choose the Void/Reissue reason code from the drop down list.
- **(Check Box)** – Check the box of the check(s) for which you wish to void and/or reissue.
- **Serial Number** – The unique serial number assigned to the check.  
*Note – The field is for display purposes only.*
- **First Date to Use** – The first date the check may be used.  
*Note – The field is for display purposes only.*
- **Last Date To Use** – The last date the check may be used.  
*Note – The field is for display purposes only.*
- **Status** – The checks disposition description.

<sup>20</sup> Refer to section 17, Void Reasons of the HANDS DFDD Food Package State for details.

*Note – The field is for display purposes only.*

- **Preview Check** – Allows the user to preview the check.

*Buttons:*

- **Void/Replace Entire Month** – The Void/Replace Entire Month button will void the selected checks and issue replacement checks of a different food package. The replace food package should be prescribed via the Food Package Assignment module<sup>21</sup> prior to attempting to Void/Replace check(s). The disposition of the original check(s) will be set to 3, 'Voided'.

*Note – The checks for all food instruments issued must be checked for the month in order to use the Void/Replace Entire Month feature.*

- **Void/Reissue Selected Checks** – The Void/Reissue Selected Checks button will void the selected checks and reissue duplicate checks but using new unique serial numbers. The disposition of the original check(s) will be set to 3, 'Voided'.
- **Void Selected Checks** – The Void Selected Checks button will void the selected checks and take no further actions. The disposition of the check(s) will be set to 3, 'Voided'.

*Calculation(s): None*

*Background Processes:*

The Void/Reissue checks module will only operate on food instruments that have a disposition status of 2, 'Issued, NOT Cashed'.

The 'Lost or Stolen' Void Reason 'B' function, is available only if the food instrument is of 'Formula' type and will be available to be assigned by the user's role.

The 'Lost or Stolen' Void Reason 'M' function, is available only if the FI is anything other than formula and will be available to be assigned by the user's role.

The Voided By field of the food instrument is set to the User ID of the user that has performed the void operation for later auditing purposes.

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<sup>21</sup> Refer to section 2, Food Package Assignment for details.

## 6 FB LOOKUP

The food benefit (FB) lookup module is used to examine food instruments. The user may query by participant, participant family, vendor id, farmer’s market id, date to use range and by serial number range. A local agency administrator can only lookup food benefits issued through their agency.

Navigation Path: Sys Admin | Food Benefits | FB Lookup

The screenshot shows the 'FB Lookup' interface. At the top, there is a navigation bar with 'WALKER [Log Off]' and a menu including 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. Below this is a 'Food Benefit Lookup' section with input fields for 'Family ID' (149994159), 'Client ID' (1341402942), 'Vendor ID', 'Farmer ID', and 'CVV ID'. There are also sections for 'Date to Use Range' (First Date to Use, Last Date to Use) and 'Serial Number Range' (Starting Serial Number, Ending Serial Number). Below these are two data tables. The first table, 'Food Benefits', has columns: Serial Number, Preview Check, Family ID, Client ID, Issue Date, First Date to Use, Last Date to Use, Cleared Date, Redemption Amount, Void Date, Void Reason, Voided By, Vendor ID, Rejected Date, and Rec Am. It shows two rows of data with serial numbers 0072193672 and 0072193671. The second table, 'CVVs', has columns: Serial Number, Preview Check, Family ID, Client ID, Issue Date, First Date to Use, Last Date to Use, Cleared Date, Redemption Amount, Void Date, Void Reason, Voided By, Vendor ID, Farmer ID, and Rejected Date. It shows two rows of data with serial numbers 0072193674 and 0072193673. Both tables include a 'Row count' of 10 and 'Showing 1-2 of 2' items. At the bottom right, there are 'Search' and 'New Search' buttons.

Figure 14: FB lookup Main Page

Fields:

**Food Benefit Lookup:**

- **Family ID<sup>22</sup>** – Enter a Family ID to search for food instruments issued to clients associated with the family and choose the Search button.
- **Client ID<sup>23</sup>** – Enter a Client ID to search for food instruments issued to the client and choose the Search button.

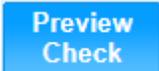
<sup>22</sup> Refer to section 2, Family Information Page, of the HANDS DFDD EnrollandCert document for details.

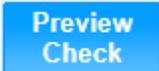
<sup>23</sup> Refer to section 2, Family Information Page, of the HANDS DFDD EnrollandCert document for details.

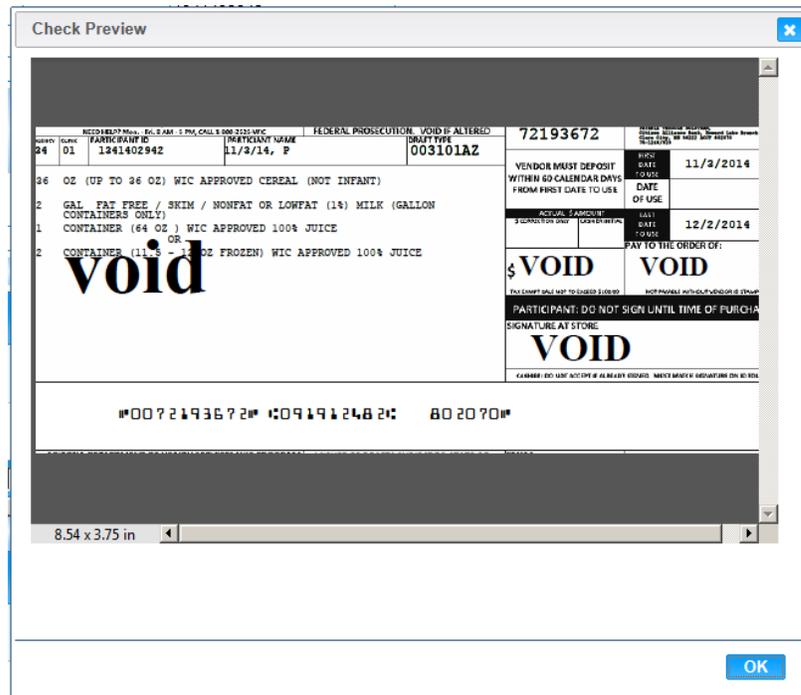
- **Vendor ID<sup>24</sup>** – Enter the Vendor ID to search for food instruments redeemed at the vendor location and choose the Search button.
- **Farmer ID<sup>25</sup>** – Enter the Farmer ID to search for food instruments redeemed at the Farmer’s Market and choose the Search button.
- **CVV ID<sup>26</sup>** – The number that uniquely identifies each farmer who accepts Cash Value Vouchers. The Farmer name is shown when the CVV ID field is validated.
- **Date to Use Range – From: / To: -** Enter the beginning and end date for which food instruments will be searched and choose the Search button.  
*Note - The field used in searching is the first date to spend.*
- **Serial Number Range – From: / To: -** Enter the beginning and ending serial numbers for which food instruments will be searched and choose the Search button.

**Food Benefits (Search Grid):**

- **Serial Number** – The number imprinted on the food instrument.  
*Note – The field is for display purposes only.*



- **Preview Check** – Select the  button in order to preview the contents of the food instrument associated with the record.



**Figure 15: Preview Food Instrument Modal**

- **Family ID** – The family ID associated with the client the food instrument was issued to.  
*Note – The field is for display purposes only.*
- **Client ID** – The Client ID associated with the client the food instrument was issued to.

<sup>24</sup> Refer to the “HANDS DFDD Vendor” document for details

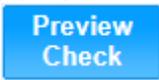
<sup>25</sup> Refer to the “HANDS DFDD Farmers Market” document for details

<sup>26</sup> Refer to the “HANDS DFDD Farmers Market” document for details

*Note – The field is for display purposes only.*

- **Issue Date** – The date the FI was created.  
*Note – The field is for display purposes only.*
- **First Date to Use** – The first date that the food instrument can be used.  
*Note – The field is for display purposes only.*
- **Last Date to Use** – The last day which the food instrument may be redeemed for WIC Foods.  
*Note – The field is for display purposes only.*
- **Cleared Date** – The date on which the food instrument was paid by the WIC fiscal intermediary.  
*Note – The field is for display purposes only.*
- **Redemption Amount** – The dollar amount which was paid to the vendor for a particular food instrument.  
*Note – The field is for display purposes only.*
- **Void Date** – The date the food instrument was voided.  
*Note – The field is for display purposes only.*
- **Void Reason** – The reason the food instrument was voided.  
*Note – The field is for display purposes only.*
- **Voided By** – The ID of the user that voided the food instrument.  
*Note – The field is for display purposes only.*
- **Vendor ID** – The vendor ID of the vendor where the food instrument was redeemed.  
*Note – The field is for display purposes only.*
- **Rejected Date** – The date on which the food instrument was rejected by the WIC fiscal intermediary.  
*Note – The field is for display purposes only.*
- **Requested Amount** – The payment amount requested by the Vendor for the food instrument.  
*Note – The field is for display purposes only.*
- **Rejected Reason** – The reason(s) the food instrument was rejected by the fiscal intermediary.  
*Note – The field is for display purposes only.*
- **Issued By** – The user ID of the user that issued the food instrument.  
*Note – The field is for display purposes only.*
- **LA/Clinic** – The Local Agency or Clinic that issued the food instrument.  
*Note – The field is for display purposes only.*
- **Horizontal Scroll Bar** – Use the Horizontal Scroll bar to scroll the fields left and right making hidden fields viewable.

#### CVVs (Search Grid):

- **Serial Number** – The number imprinted on the food instrument.  
*Note – The field is for display purposes only.*
- **Preview Check** – Select the  button in order to preview the contents of the food instrument, associated with the record.

Check Preview

REDEEMABLE AT APPROVED WIC STORES OR AUTHORIZED FARMERS' MARKETS UP TO \$5.00 ANY COMBINATION FRUITS/VEGETABLES (FRESH, FROZEN AND/OR CANNED) WIC CUSTOMER MAY PAY AMOUNT OVER \$5.00	VENDOR MUST DEPOSIT WITHIN 60 CALENDAR DAYS FROM FIRST DATE TO USE	ISSUE DATE: 11/3/2014
<b>void</b>	ACTUAL AMOUNT: \$ VOID	LAST DATE TO USE: 12/2/2014
	PAY TO THE ORDER OF: VOID	
	PARTICIPANT: DO NOT SIGN UNTIL TIME OF PURCHASE	
	SIGNATURE AT STORE: VOID	

8.54 x 3.75 in

OK

**Figure 16: Preview Food Instrument Modal**

- **Family ID** – The family ID associated with the client the food instrument was issued to.  
*Note – The field is for display purposes only.*
- **Client ID** – The Client ID associated with the client the food instrument was issued to.  
*Note – The field is for display purposes only.*
- **Issue Date** – The date the FI was created.  
*Note – The field is for display purposes only.*
- **First Date to Use** – The first date that the food instrument may be redeemed for WIC Foods.  
*Note – The field is for display purposes only.*
- **Last Date to Use** – The last day which the food instrument may be redeemed for WIC Foods.  
*Note – The field is for display purposes only.*
- **Cleared Date** – The date on which the food instrument was paid by the WIC fiscal intermediary.  
*Note – The field is for display purposes only.*
- **Redemption Amount** – The dollar amount which was paid to the vendor for a particular food instrument.  
*Note – The field is for display purposes only.*
- **Void Date** – The date the food instrument was voided.  
*Note – The field is for display purposes only.*
- **Void Reason** – The reason the food instrument was voided.  
*Note – The field is for display purposes only.*
- **Voided By** – The ID of the user that voided the food instrument.  
*Note – The field is for display purposes only.*

- **Vendor ID** – The vendor ID of the vendor where the food instrument was redeemed.  
*Note – The field is for display purposes only.*
- **Farmer ID** – The Farmer’s ID of the farmer’s market where the food instrument was redeemed.  
*Note – The field is for display purposes only.*
- **Rejected Date** – The date on which the food instrument was rejected by the WIC fiscal intermediary.  
*Note – The field is for display purposes only.*
- **Requested Amount** – The amount that was requested by Vendor Management for payment on a rejected food instrument.  
*Note – The field is for display purposes only.*
- **Rejected Reason** – The reason(s) the food instrument was rejected by the fiscal intermediary.  
*Note – The field is for display purposes only.*
- **Issued By** – The user ID of the user that issued the food instrument.  
*Note – The field is for display purposes only.*
- **LA/Clinic** – The Local Agency or Clinic that issued the food instrument.  
*Note – The field is for display purposes only.*
- **Horizontal Scroll Bar** – Use the Horizontal Scroll bar to scroll the fields left and right making hidden fields viewable.

*Buttons:*

- **Search** – Press this button to execute query of search criteria entered. Results are sorted in descending order by serial number, resulting in the most recent serial number displaying at the top of the list.
- **New Search** – Press this button to clear search criteria entered and search results retrieved.

*Calculation(s): None*

*Background Processes: None*

## 7 VOID UN-ISSUED FOOD BENEFITS

The Void Un-Issued food benefits module is used void food instruments that have not yet been issued. A local agency administrator can only Void Un-Issued food benefits issued through their agency.

*Navigation Path: Sys Admin | Food Benefits | Void Un-Issued Food Benefits*

The screenshot displays the 'Void Un-Issued Food Benefits' form. At the top, there is a navigation bar with the user 'CWALKER' and a 'Log Off' link. The main menu includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. Below the menu, there is a dropdown for 'Appointment Statuses'. The form itself has the following fields:

- \*Starting Serial Number**: A text input field.
- \*Ending Serial Number**: A text input field.
- \*Void Reason**: A dropdown menu.
- Comment**: A text area.

At the bottom right of the form, there are two buttons: 'Save' and 'Reset'.

**Figure 17: Void Un-Issued Food Benefits Page**

### Fields:

- **Starting Serial Number** – The Start and End Serial Numbers make up a range of serial numbers assigned to food instruments.
- **Ending Serial Number** – The Start and End Serial Numbers make up a range of serial numbers assigned to food instruments.
- **Void Reason**<sup>27</sup> – A drop down list of valid void reasons assigned to the voided food instruments.
- **Comment** – A free form text column for additional comments associated with the record.

### Buttons:

- **Save** – Press this button to void the food instruments meeting the Start/End Serial range search criteria.
- **Reset** – Press this button to clear search criteria.

<sup>27</sup> Refer to section 17, Void Reasons for details.

*Calculation(s): None*

*Background Processes:*

System will perform the following validations on Save:

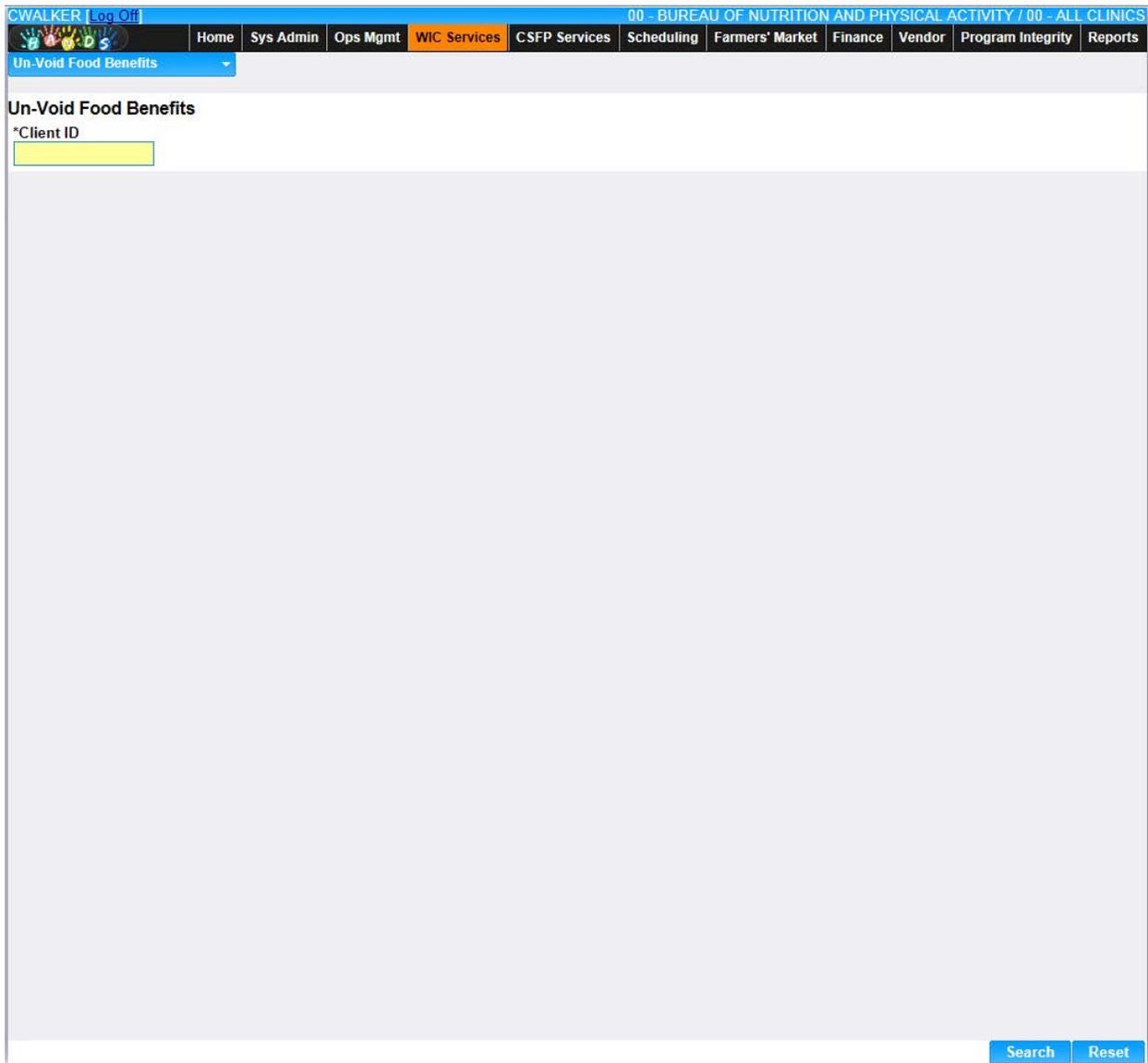
1. Starting Serial Number is entered.
2. Ending Serial Number is entered.
3. Void Reason is selected.

## 8 UN-VOID FOOD BENEFITS

The Un-Void Food Benefits module allows local agency personnel with a specific role the ability to unvoid food instruments (FI) that were voided during the present day. A local agency administrator can only Un-Void food benefits issued through their agency.

*Note – The Un-Void Food Benefits module will only allow unvoided checks that were voided in the past (prior to present day), when logged in at the State Admin level<sup>28</sup>.*

Navigation Path: Sys Admin | Food Benefits | Un-Void Food Benefits



**Figure 18: Un-Void Food Benefits Search Page**

<sup>28</sup> Refer to the HANDS DFDD Food Package State document for details.

*Fields:*

- **Client ID** – The Client ID associated with the client the food instrument was issued to.

*Buttons:*

- **Search** – Press this button to execute query of search criteria entered.
- **Reset** – Press this button to clear search criteria entered and search results retrieved.

*Calculation(s): None*

*Background Processes:*

The system will display an error message if a user attempts to un-void client checks belonging to an agency/clinic that they are not logged in as.

*“A user cannot Un-Void checks for a client not belonging to the clinic they are logged in as.”*