



# **Arizona Department of Health Services**

Bureau of Nutrition and Physical Activity

## **HANDS WIC System**

### **Detailed Functional Design Document**

#### **Nutrition Education**

**November 18, 2014**

**Version 1.0**

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## REVISION HISTORY

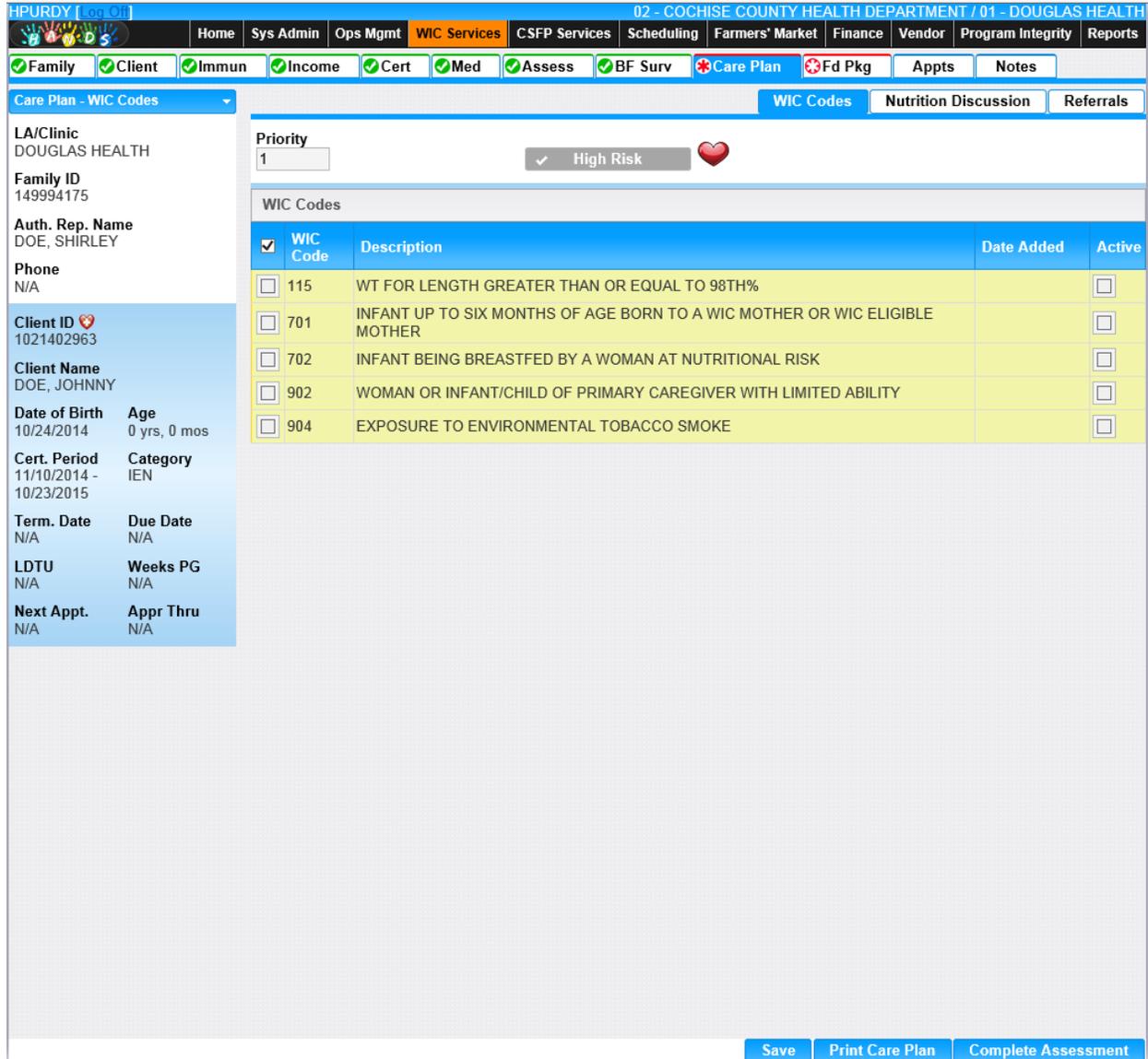
The chart below indicates revisions made to this document:

| <b><u>Version</u></b> | <b><u>Name</u></b> | <b><u>Brief Description of Change</u></b> | <b><u>Published</u></b> |
|-----------------------|--------------------|---|-------------------------|
| 1.0                   | Heather Purdy      | Initial Draft                             | 02-26-2015              |
|                       |                    |   |                         |
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|                       |                    |   |                         |

# 1 CARE PLAN

The Care plan Screen is located in the WIC Services Module and is part of the Certification workflow. The Care Plan is organized to match the flow of an appropriate nutrition education contact; with all data elements on the same page. The order of logic is as follows: WIC Code Calculation process, WIC Code display, continuing with Nutrition Discussion Topics, and Referrals. See Figure 1 below.

*Navigation Path: WIC Services/Care plan*



*Figure 1: Care Plan screen*

The process is as follows:

- Once the initial assessment is completed, **WIC Codes** are both calculated (auto-calculated and manually assigned) and displayed on the Care Plan page.
- Next is the **Nutrition Discussion** section for educating clients on offered nutrition discussion topics.
- Next is a providing of **Referrals**.

Although many items are client based (WIC Codes), Nutrition Discussion topics and Referrals can also be Family based.

### **Section 1 - WIC Codes Page:**

WIC Codes that are assigned to a Client based on data entered in the tabs of the Certification workflow (medical, assessment, etc.)

- High Risk and Priority designation are captured with this section.

### **Section 2 - Nutrition Discussion Page:**

- Encompass the assignment of nutrition discussion topics for the client and/or family, and how the nutrition discussion was provided. The Nutrition Discussion section of the Care plan includes a field for type with a drop down for individual contact or class. If the participant was scheduled for a class in the appointment scheduler and the topic was applied to the record this field will auto populate with class.

### **Section 3 – Referrals Page:**

- Referrals will remain a table-driven field and will auto-populate with any Mandatory Referrals designated by the State Agency in the Programs base table.
  - Mandatory Referrals will include any Adjunctively Eligible programs.
  - Users will also be able to manually add referrals which will default to the status of ‘Referred’.
- System populated Referrals cannot be deleted or modified.
- Manually entered Referrals can be modified or deleted by the same User that entered them on the day they were entered.
- Default referrals will be assigned if the following flags are not selected:

#### **Income –**

- If adjunct program information is obtained from the income screen then the responses will auto populate to the referral section of the care plan. These Referrals cannot be modified on Referrals page.
- If ‘participating with proof’ or ‘participating no proof’ are selected, the referral section of the care plan screen will auto populate with the adjunct program information with a status of participating.
- If ‘Referred’ is selected, the referral section of the care plan screen will auto populate with the adjunct program information with a status of ‘Referred’.
- If ‘N/A’ is selected, the referral section of the care plan screen will auto populate with the adjunct program information with a status of ‘N/A’.
- If Referrals are added in Care Plan, which are considered Adjunctively Eligible programs, it is not necessary for the income screen to match this data.

**Immunizations –**

- If the client is not current on immunizations, the system will select a Status of Referred on the Care Plan screen.
- If immunizations are current, a Status of Participating will be defaulted by the system.
- If the client does not have an Immunization record the Referral will default to N/A.
- If the client is over 2 years old, the Immunization referral will not display.

**High Risk –**

- If a client is flagged as “High Risk”, the Nutritionist referral will be automatically assigned by the system with a Status of Referred.

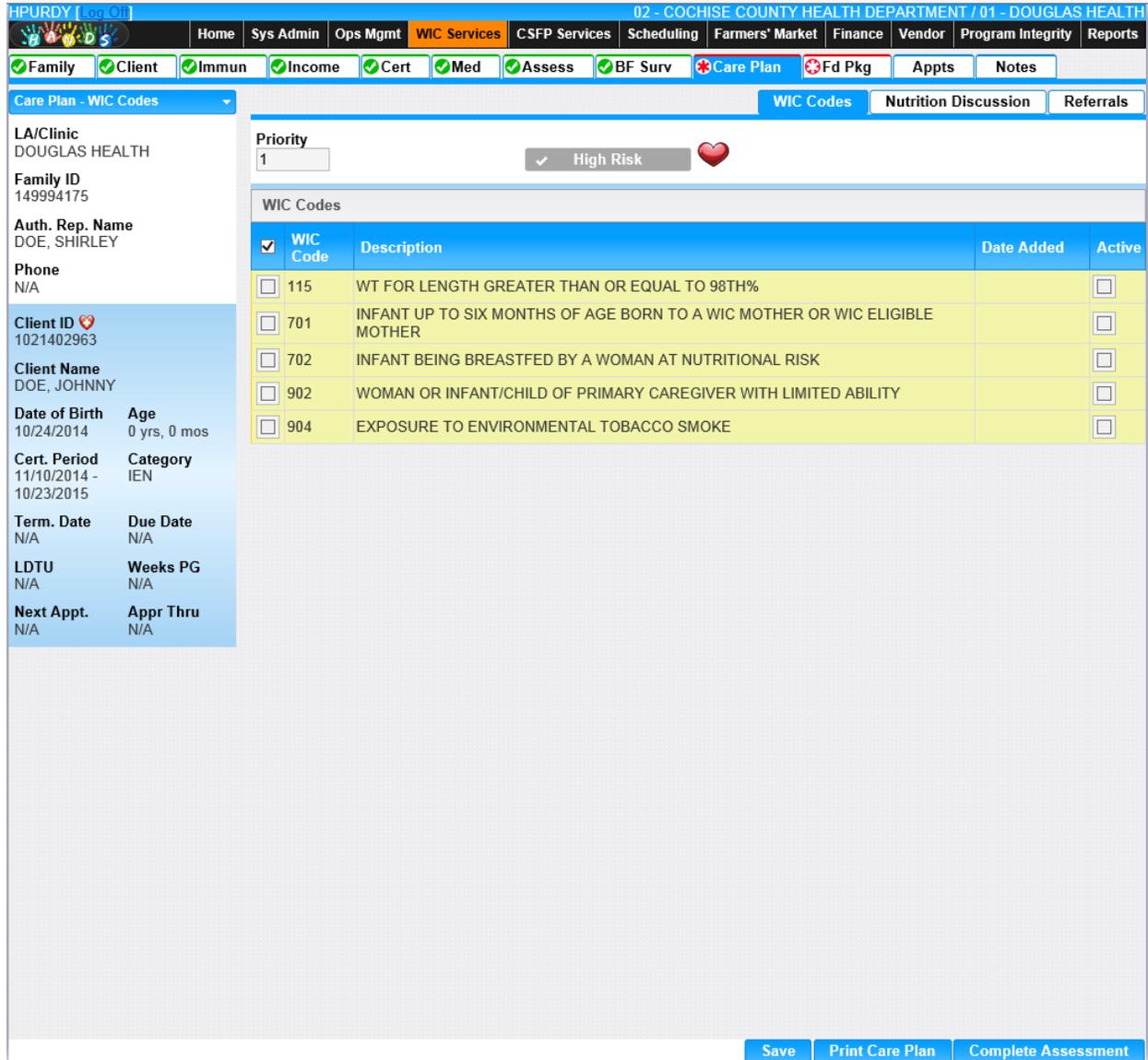
**Breastfeeding Peer Counselor Referrals-**

- Existing Care Plan referrals will be read only on the Breastfeeding Peer Counselor – Referrals screen.
- The system will allow the user to add any type of new referrals.
- For new referrals, this screen will give the user the option of Participating, Referred, and N/A, just like the Care Plan – Referrals screen,
- Each manually added referral will default to “Referred.”
- Referrals added from this screen can be modified or deleted from this screen by the same user that entered them on the same day they were entered. After that, they cannot be modified or deleted.

## 2 WIC CODES

The WIC Codes page is where WIC Codes that are assigned to a Client based on data entered in the tabs of the Certification workflow (medical, assessment, etc.) are listed. The User can also complete the assessment for Client on the WIC Codes page.

*Navigation Path: WIC Services/Care Plan/WIC Codes*



*Figure 2: WIC Codes Page*

*Fields:*

- **Priority**- This field is derived from the WIC Codes assigned to the Client. This field is display only

- **High Risk-** Checkbox. This field is derived from the WIC Codes assigned to the Client. User is allowed to manually check field if unchecked. If the field is checked, the User is not allowed to uncheck it. This field is optional.
  - **Red Heart Icon**  - If High Risk checkbox is checked, the Heart Icon will appear for Client. After the Client sees a Nutritionist, the Nutritionist clicks the Heart and it will turn green . The Heart Icon will also display on the active record. When the Heart icon is green on the Care Plan page, it will also display green on the active record. For more information on the active record, see the Enrollment & Certification DFDD.
- **Count-** Checkbox. Check the WIC Codes which will be printed on Care Plan. This box defaults with a checkmark. This field is optional.
- **WIC Codes-** System Generated or manually added codes for Client. At least one WIC code is required in this field for a certification to be complete. This field is display only.
- **Description-** Description of the WIC Code. This field is display only.
- **Date Added-** The date that the WIC Codes were assigned to Client. This field is system-generated and display only.
- **Active-** Checkbox. This box is checked if the WIC Code is Active for the Client.

*Buttons:*

- **Save-** Press this button to save any modifications made to the page.
- **Print Care Plan-** Press this button to Print the Care Plan for Client
- **Complete Assessment-** Press this button to automatically calculate any system generated Codes assigned from Medical and Assessment pages and set them to Active. It will also list WIC codes manually checked on the Assessment page and make them active as well.

*Calculation(s):*

See Complete Assessment

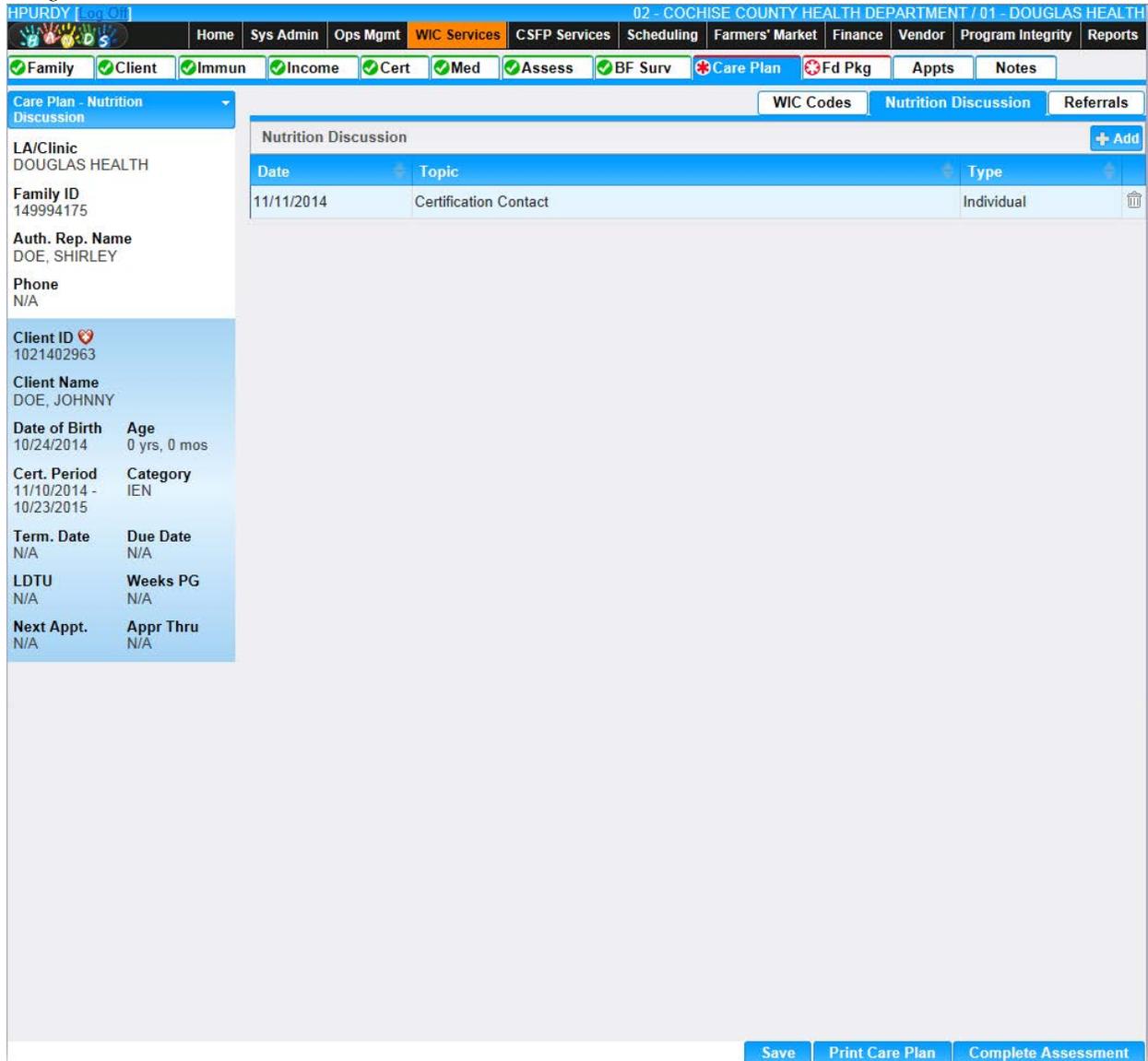
*Background Processes:*

See Complete Assessment

### 3 NUTRITION DISCUSSION

The Nutrition Discussion page allows for the assignment of Nutrition Discussion Topics for the Client and how the Nutrition Discussion was provided. The selections for types are Individual contact and Group Education. If the Client was scheduled for a class in the Appointment Scheduler and the topic was applied to the record, this page will auto populate with the Class. See Figure 3 below.

*Navigation Path: WIC Services/ Care Plan/ Nutrition Discussion*



*Figure 3: Nutrition Discussion page*

*Fields:*

- **Date-** The Date the Nutrition Discussion was added for Client. This field is auto populated.

- **Topic-** This field displays the topic that was discussed.
- **Type-** This field displays how the Nutrition Discussion Topic was delivered to the Client, either on an individual basis or through Group Education.
-  **(Delete Icon)-** Select to delete a record on the same day data was entered. Records cannot be deleted after end of day processes have occurred.

*Buttons:*

-  **(Add Button)-** Press this button to add a new Nutrition Discussion Topic.
- **Save-** Press this button to save any modifications made to the page.
- **Print Care Plan-** Press this button to Print the Care Plan for Client
- **Complete Assessment-** Press this button to automatically calculate any system generated Codes assigned from Medical and Assessment pages and set them to Active. It will also list WIC codes manually checked on the Assessment page and make them active as well.

*Calculation(s): None*

*Background Processes: None*

### 3.1 Add Nutrition Discussion Topic

Navigation Path: WIC Services/ Care Plan/ Nutrition Discussion/ Add

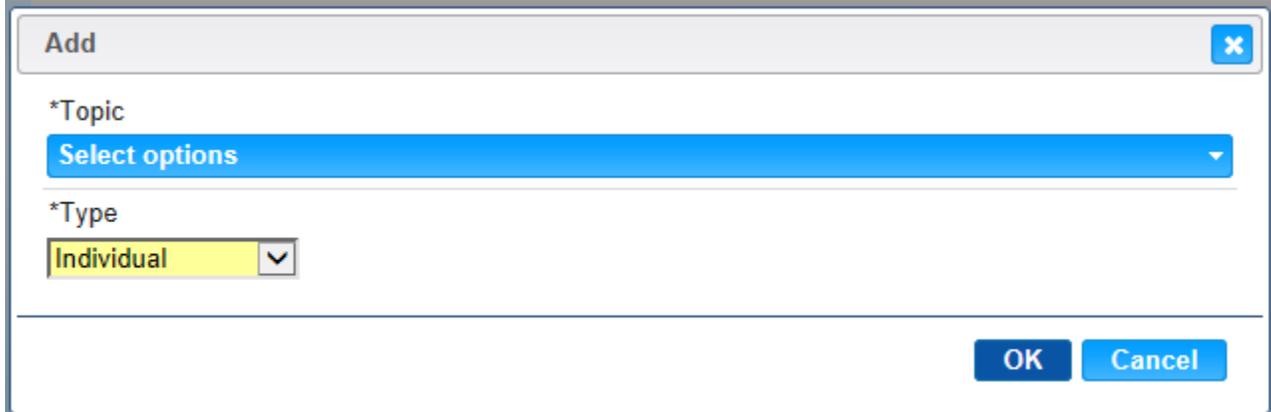


Figure 4: Add Nutrition Discussion Topic

*Fields:*

- **Topic-** Select the Topic that was discussed from the drop down list. This Field is Mandatory. *Note:* User is able to select multiple topics with the same Type. Multiple topics will appear individually in Grid.
- **Type-** Select the type (Individual or Group Education) from the Drop down list. Field defaults to Individual. This field is Mandatory.

*Buttons:*

- **OK-** Press this button after fields are completed. Add modal closes and Topics are added to page.
- **Cancel-** Press this button to close the add modal. No Topics are added to page.
- **X (Close Modal)-** The modal is closed and no action is taken

*Calculation(s): None*

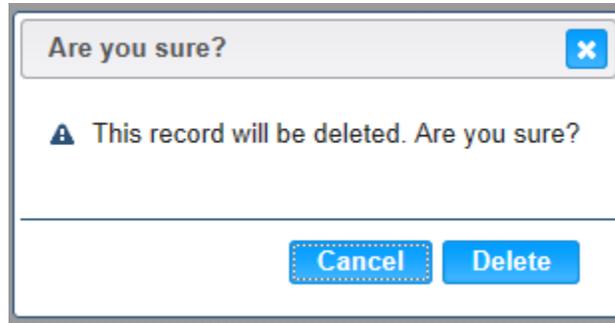
*Background Processes:*

Once the Nutrition Discussion Topics are added, User is required to hit save button to save the added data.

### 3.2 Delete Nutrition Discussion Topic

A Nutrition Discussion Topic can only be deleted on the same day that it was entered.

*Navigation Path: WIC Services/ Care Plan/ Nutrition Discussion/ Delete*



*Figure 5: Delete Nutrition Discussion Topic*

*Fields: None*

*Buttons:*

- **Cancel**- Press this button to cancel the delete and to keep selected Nutrition Discussion Topic.
- **Delete**- Press this button to delete the selected Nutrition Discussion Topic.
-  **(Close Modal)**- The modal is closed and no action is taken

*Calculation(s): None*

*Background Processes: None*

## 4 REFERRALS

The Referrals page is a list of Referrals for the Client. The Status of all Referrals is Mandatory before Completing Assessment for Client. See Figure 6 below.

Navigation Path: WIC Services/Care Plan/ Referrals

The screenshot shows the 'Referrals' page in the HPURDY WIC System. The top navigation bar includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The 'WIC Services' menu is expanded, showing options like 'Family', 'Client', 'Immun', 'Income', 'Cert', 'Med', 'Assess', 'BF Surv', 'Care Plan', 'Fd Pkg', 'Appts', and 'Notes'. The 'Care Plan - Referrals' section is active, displaying a table of referrals for a client named 'DOE, JOHNNY'.

| <input checked="" type="checkbox"/> | Date       | Program  | Organization | Address | Status        |                                     |                          |
|-------------------------------------|------------|--|--------------|---------|---------------|-------------------------------------|--------------------------|
| <input checked="" type="checkbox"/> | 11/12/2014 | LOCAL AGENCY REFERRAL LIST                                   |              |         |               | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 11/12/2014 | NUTRITIONIST/RD  |              |         | Referred      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 11/12/2014 | IMMUNIZATION   |              |         | Participating | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 11/12/2014 | AHCCCS   |              |         | Referred      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 11/12/2014 | FOOD DISTRIBUTION PROGRAM ON INDIAN RESERVATIONS (FDIR)      |              |         | Referred      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 11/12/2014 | FOOD STAMPS (SNAP) SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM |              |         | Participating | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 11/12/2014 | TANF   |              |         | Participating | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| <input checked="" type="checkbox"/> | 11/12/2014 | SECTION 8  |              |         | Referred      | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

At the bottom of the page, there are three buttons: 'Save', 'Print Care Plan', and 'Complete Assessment'.

Figure 6: Referrals Page

Fields:

- **Count-** Checkbox. Check the Referrals which will be printed on Care Plan. This box defaults with a checkmark. This field is optional.
- **Date-** Date Referral was added. This field is generated by the System
- **Program-** The name of the Referral Program. This field is Mandatory.
- **Organization-** The name of the Organization. This field is Optional
- **Address-** The Address of the Organization. This field is display only.

- **Status-** The Status of the Referral which will populate from the Adjunct Program Information that was entered on the Income Screen. This field is Mandatory.
-  **(Edit Icon)-** Select to change Referral or add a status to Referral. System assigned Referrals cannot be modified.
-  **(Delete Icon)-** Select to delete a record that was manually entered by the same user that entered them on the same day they were entered. System assigned Referrals cannot be deleted.

*Note:* All Referrals need a status before the page is saved and before completing Assessment.

*Buttons:*

-  **(Add new record button)-** Press this button to add a new Referral.
- **Save-** Press this button to save any modifications made to the page.
- **Print Care Plan-** Press this button to Print the Care Plan for Client
- **Complete Assessment-** Press this button to set the WIC Codes to Active. It will make WIC codes added manually and checked on the Assessment page active as well.

## Referrals Overview

The Referrals section of the Care Plan screen will be used to document organizations that clients have been referred to, or are participating in. A status of Participating, Referred, or Not Applicable (N/A) will be required for each Referral. Nutritionist Referrals and Mandatory Referrals, including Immunization and Adjunctively Eligible programs, will be automatically added by the system according to the business rules. For Adjunctively Eligible programs that were documented in the Income screen, the system must auto-populate the status based on what was entered. For remaining Mandatory Referrals that were not addressed in the Income screen, the user will be required to select one of the three statuses. If the user adds additional referrals manually, the status will default to Referred, however the user may change the Status.

## Referrals Setup

The general process to setup Mandatory Referrals in the Administration section of HANDS is as follows: The user will select the Mandatory Referrals checkbox on the Programs base table.

## Mandatory Referrals

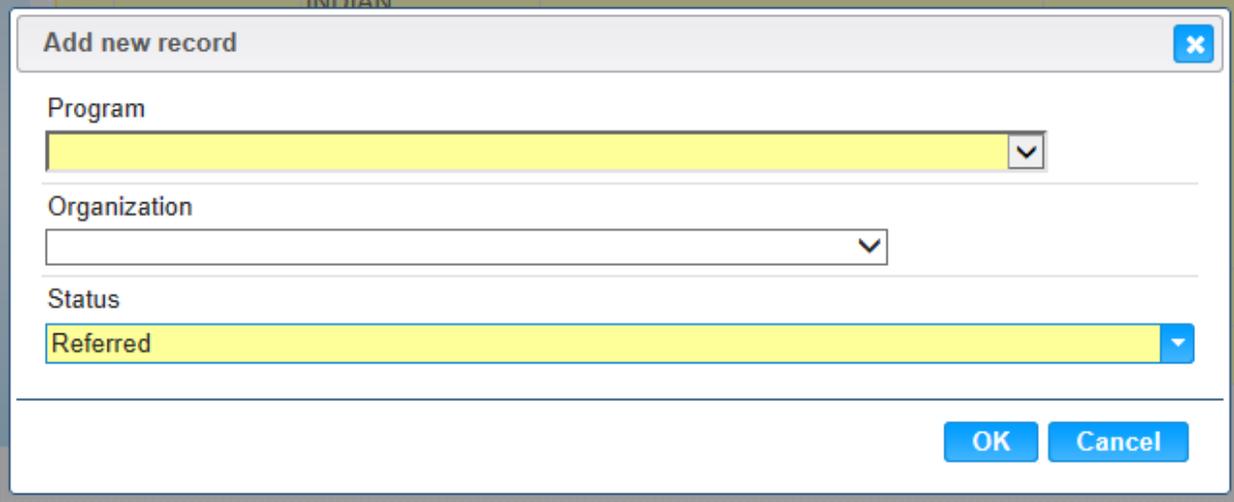
Mandatory Referrals will be different for each State Agency. The list of these referrals will be controlled by State Agency personnel. All referrals that are designated “Mandatory” will be automatically assigned to each client, per the business rules, at every certification.

## Other Referrals

The Nutritionist referral will be assigned to clients that are flagged as High Risk after WIC Codes have been assigned. The system will also allow users to manually enter referrals at any time.

## 4.1 Add a Referral

Navigation Path: WIC Services/ Care Plan/ Referrals/ Add a new Referral



The screenshot shows a modal window titled "Add new record" with a close button (X) in the top right corner. The form contains three dropdown menus: "Program" (highlighted in yellow), "Organization" (empty), and "Status" (set to "Referred" and highlighted in yellow). At the bottom right, there are two buttons: "OK" and "Cancel".

Figure 7: Adding a new Referral

### Fields:

- **Program-** Select a Program from the drop down list. This field is Mandatory.
- **Organization-** Select an Organization from the drop down list. This field is Optional
- **Status-** Select a Status from the drop down list (Referred, Participating or N/A). Field defaults to Referred. This field is Mandatory.

*Note:* If Referrals are added to Care Plan that are considered Adjunct Eligible programs, it is not necessary for the Income page to match this data.

### Buttons:

- **OK-** Press this button after fields are completed. Add modal closes and Referrals are added to page.
- **Cancel-** Press this button to close the add modal. The Referral was not added to page.
- **X (Close Modal)-** The modal is closed and no action is taken

### Calculation(s):

- Whenever user updates Program selection, System will populate current local agency's outreach organizations for selected program.

*Background Processes: None*

## 4.2 Edit a Referral

*Navigation Path: WIC Services/ Care Plan/ Referrals/ Edit a Referral*

The screenshot shows a modal window titled "Edit Record" with a close button (X) in the top right corner. The window contains three dropdown menus:

- Program:** A dropdown menu with "LOCAL AGENCY REFERRAL LIST" selected and highlighted in yellow.
- Organization:** An empty dropdown menu.
- Status:** A dropdown menu with "Participating" selected and highlighted in yellow.

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

*Figure 8: Editing a Referral*

*Fields:*

- **Program-** Select a Program from the drop down list. This field is Mandatory.
- **Organization-** Select an Organization from the drop down list. This field is Optional
- **Status-** Select a Status from the drop down list (Referred, Participating or N/A). This field is Mandatory.

*Note:* The Referrals that are entered on Income page cannot be edited. System populated Referrals cannot be edited. Manually entered Referrals can be edited by the same user that entered them on the same day they were entered.

*Buttons:*

- **OK-** Press this button after fields are completed. Edit modal closes and the edited Referrals are displayed on page.
- **Cancel-** Press this button to close the Edit modal. The Referral is not edited.
- **X (Close Modal)-** The modal is closed and no action is taken

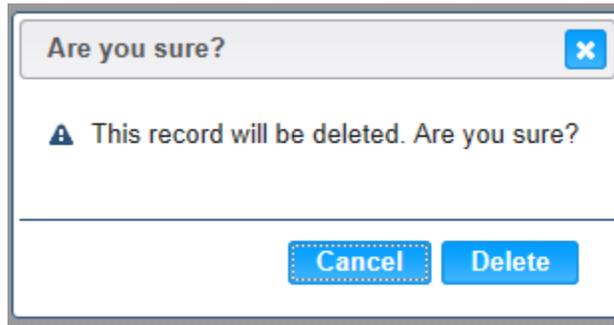
*Calculation(s):*

- Whenever user updates Program selection, System will populate current local agency's outreach organizations for selected program.

*Background Processes: None*

### 4.3 Delete a Referral

*Navigation Path: WIC Services/ Care Plan/ Referrals/ Delete Referral*



*Figure 9: Delete a Referral*

*Fields: None*

*Buttons:*

- **Cancel**- Press this button to cancel the delete and to keep selected Referral.
- **Delete**- Press this button to delete the selected Referral.
-  (**Close Modal**)- The modal is closed and no action is taken

*Notes:* System populated Referrals cannot be deleted. The Referrals that are entered on Income page cannot be deleted. Manually entered Referrals can be deleted by the same user that entered them on the same day they were entered.

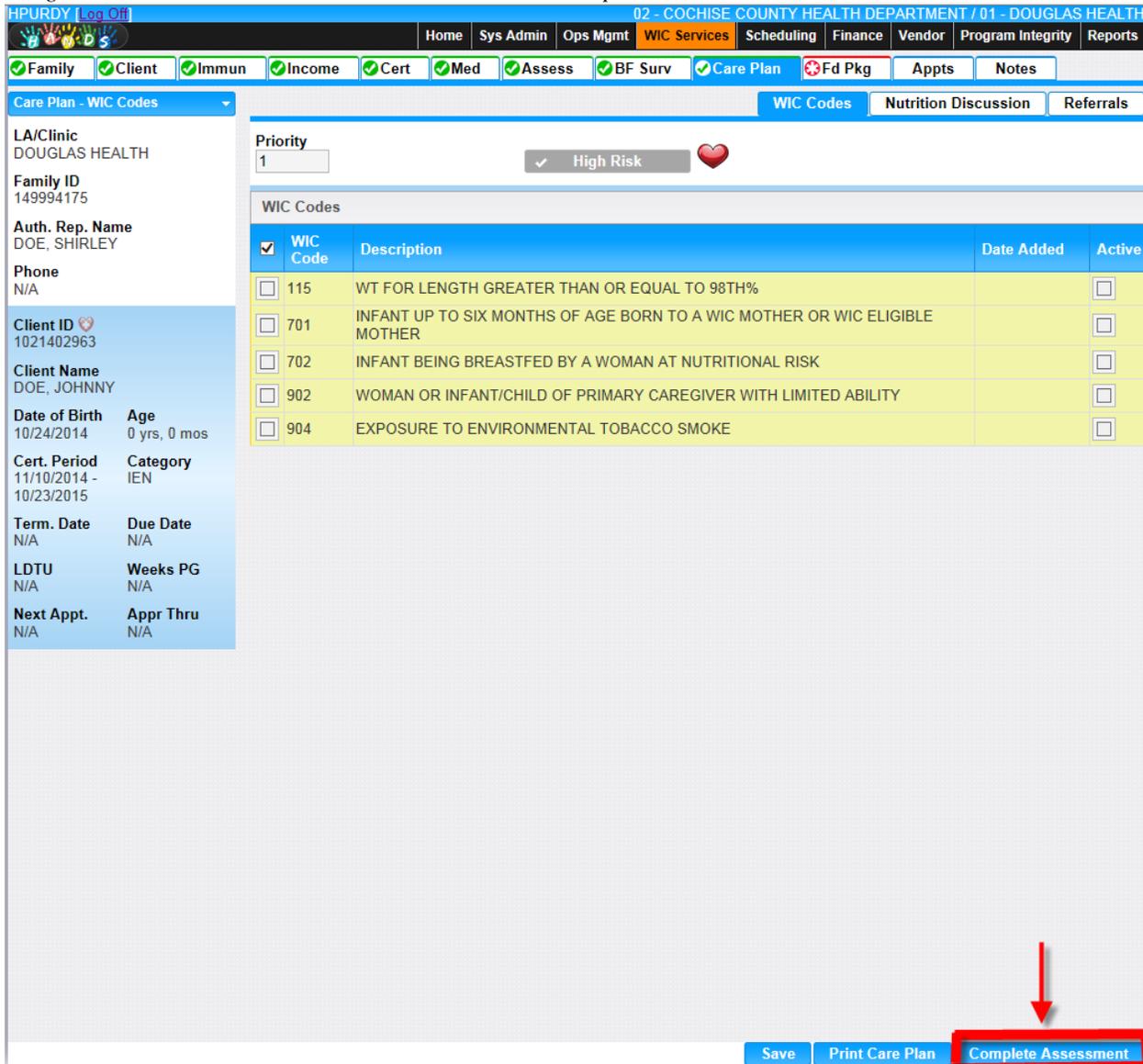
*Calculation(s): None*

*Background Processes: None*

## 5 COMPLETE ASSESSMENT

Completing the Assessment for Clients is Mandatory in order to receive Food Benefits. All Clients must have at least one WIC Code assigned to them in order to receive benefits. The Referrals page must be completed and saved before completing the assessment for Client. Completing the Assessment is done by pressing the Complete Assessment Button at the bottom of any page within the Care Plan tab. Once the user has pressed the Complete Assessment button, the WIC Codes assigned to the client cannot be removed by either the user or the system. See Figure 10 below.

*Navigation Path: WIC Services/ Care Plan/ WIC Codes/ Complete Assessment*



**Figure 10: Complete Assessment Button**

*Buttons:*

- **Complete Assessment-** Press this button to automatically set any system generated Codes assigned from Medical and Assessment pages to Active. It will also set WIC codes manually assigned and checked to active as well.

*Calculation(s):*

- The WIC Code assignments are not actually assigned to the participant until the "Complete Assessment" button on the Care Plan page is pressed, at that time the C\_HEALTH\_RISK\_FACTORS table is updated

*Background Processes:*

- When the Complete Assessment button is pressed the system assigns the risk factors to the participant by inserting a record for each risk factor into the C\_HEALTH\_RISK\_FACTORS table. The participant's priority is determined by comparing C\_RISK\_FACTORS.RISK\_FACTOR\_ID to C\_HEALTH\_RISK\_FACTORS.CRF\_RISK\_FACTOR\_ID and assigning the highest C\_RISK\_FACTORS.CP2\_ID value to C\_CLIENTS.CP2\_ID and C\_CERTIFICATIONS.CP2\_ID. The participant is also flagged as high risk using a similar process, the system compares C\_RISK\_FACTORS.RISK\_FACTOR\_ID to C\_HEALTH\_RISK\_FACTORS.CRF\_RISK\_FACTOR\_ID and sets C\_CERTIFICATIONS.HIGH\_RISK\_FLAG to 'Y' if any of the C\_RISK\_FACTORS.HIGH\_RISK\_FLAG's equal 'Y'. System also captures the High Risk added date and the user name who processed the client's assessment. If the participant is breastfeeding an infant certified in WIC, risk factor 601 is inserted into C\_HEALTH\_RISK\_FACTORS. The priority of the woman is determined by her risk factors and then set to the highest priority of either the breastfeeding infant or the woman. In the case where there are multiple breastfeeding infants the infant with the highest priority is chosen.

If after the initial assessment the user records another health assessment during a certification period the system does not remove risks that were assigned during previous assessments that may not apply according to the latest health assessment for historical reasons, instead the system sets the C\_HEALTH\_RISK\_FACTORS.ACTIVE\_FLAG to 'N'. The user is not allowed to remove risk factors for the current certification period manually after EOD.

If the user manually assigns a risk factor to the participant by adding a record to the Health Risk Factors block the system sets the C\_HEALTH\_RISK\_FACTORS.MANUAL\_FLAG to 'Y'.

When heart icon turns Green, system sets the client's certification record high risk flag to 'G' and also captures the High Risk cleared date, and user name who cleared the high risk.

On successful complete assessment, Client's status set to Active (A).

### 5.1 No WIC Codes

In the event that the Client has no WIC Codes assigned to them, after pressing the Complete Assessment Button, A modal will appear asking user if they want to assign Codes 401 or 428 to Client. See Figure 11 below.

Navigation Path: WIC Services/ Care Plan/ WIC Codes

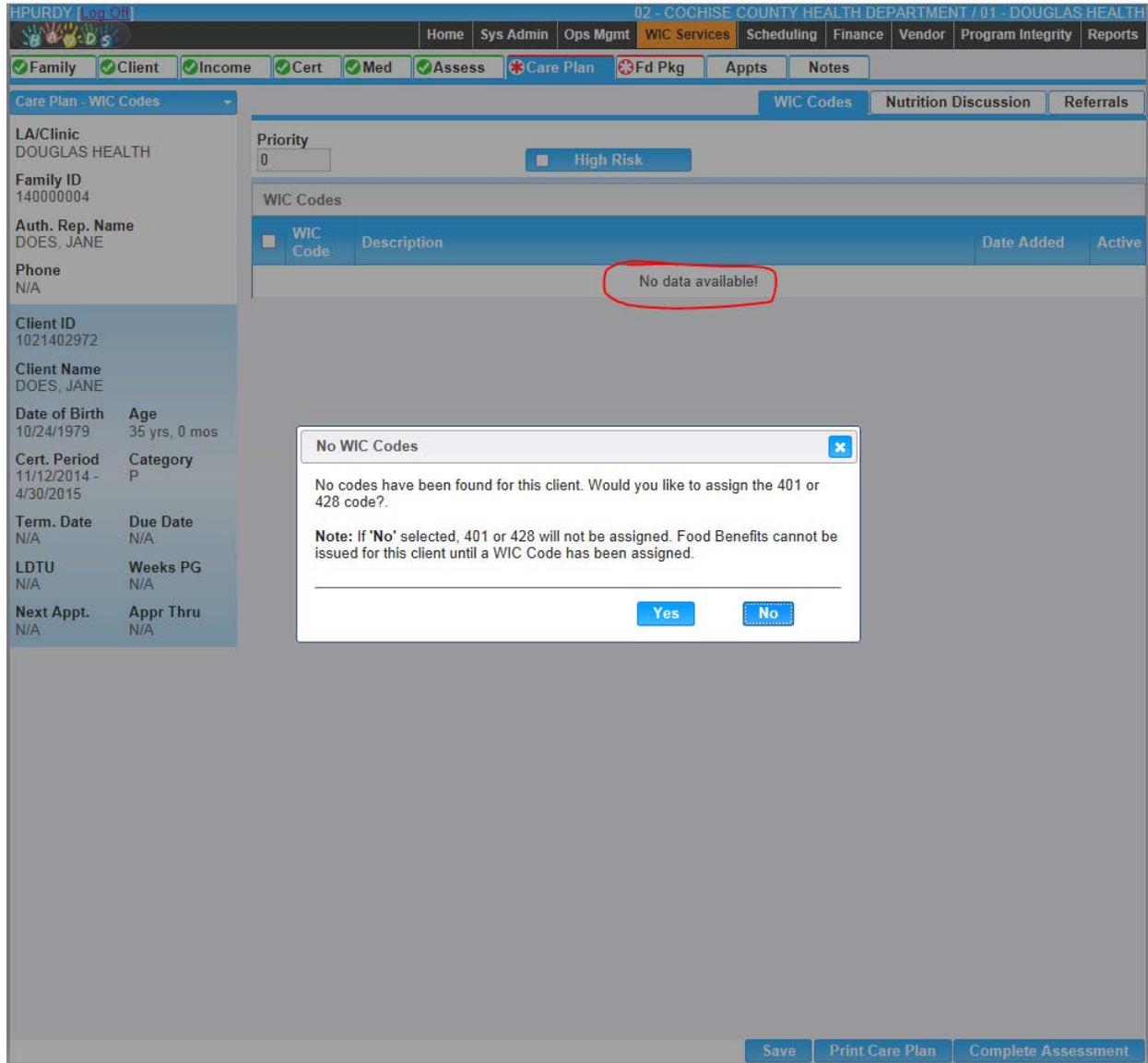


Figure 11: Complete Assessment- No WIC Codes

Fields: None

*Buttons:*

- **Yes-** Press this button if user would like to assign codes 401 or 428 to Client. The code will be assigned by Category. Code 401 will be assigned to all Women categories and C2-C4 Categories. Code 428 will be assigned for all Infant Categories and the C1 Category.
- **No-** Press this button is user would not like codes 401 or 428 assigned to Client. A message will be displayed “Food Benefits cannot be issued for this Client until a WIC Code has been assigned.” The user will then need to manually assign an appropriate code or make the necessary changes to the Assessment page.
-  **(Close Modal)-** The modal is closed and no action is taken

*Calculation(s): None*

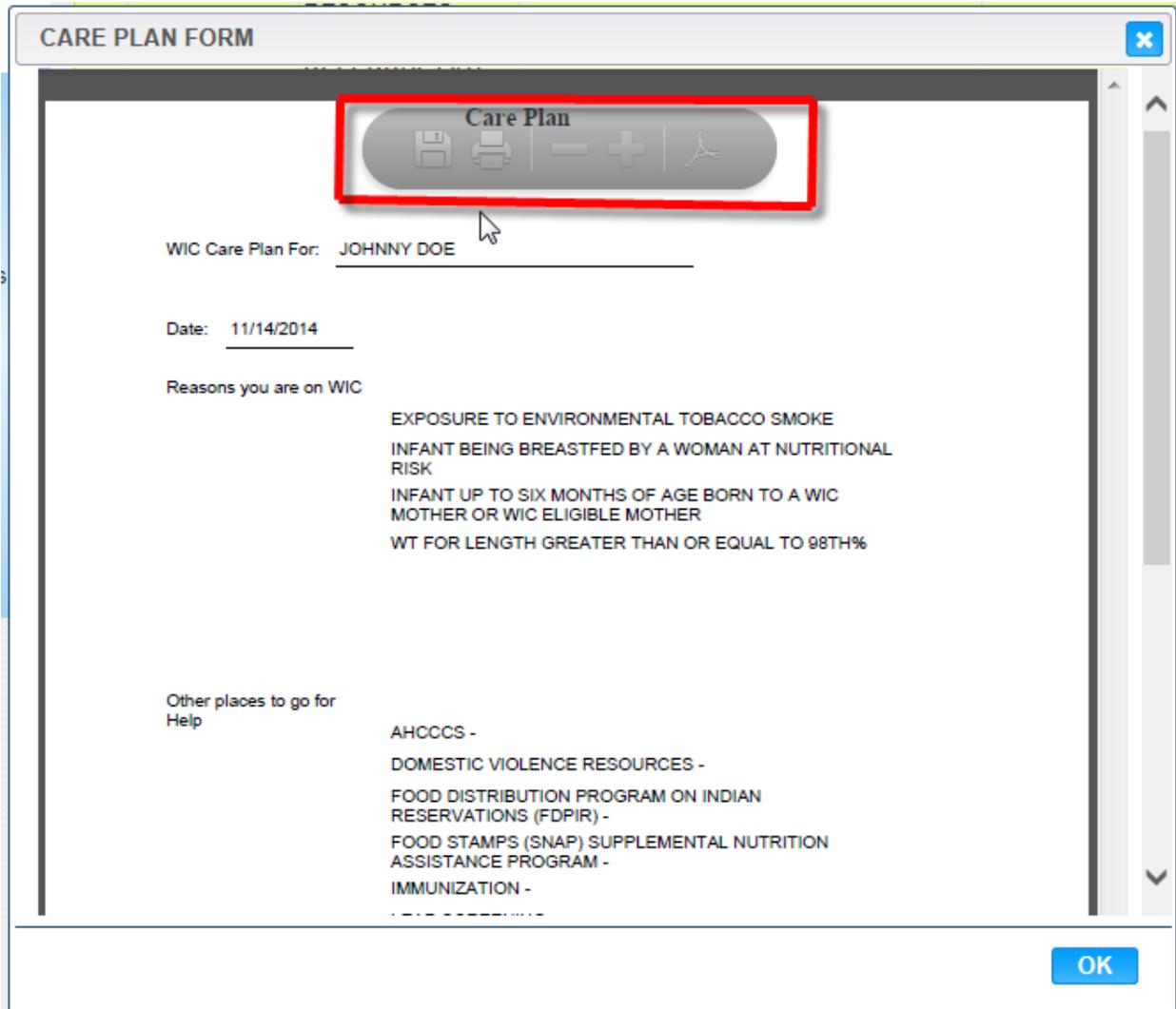
*Background Processes:*

- On successful assignment of default wic code, system marks Client’s record status as Active (A).

## 6 PRINT CARE PLAN

The User is able to print the Care plan for the Client by pressing the Print Care Plan button. The Care Plan form lists the Referrals and WIC codes that are assigned to the Client. The Care Plan will not list the Clients assigned WIC Codes until after the Complete Assessment button is pressed. The Care Plan will be printed by clicking the printer icon located on the Adobe Reader bar of the Care Plan preview. See Figure 12 below.

*Navigation Path: WIC Services/ Care Plan/ WIC Codes/Print Care Plan*



*Figure 12: Print Care Plan*

*Fields: None*

*Buttons:*

-  **(Close Modal)**- The window is closed and no action is taken

-  (**OK button**)- Press this button to close the viewer closes.

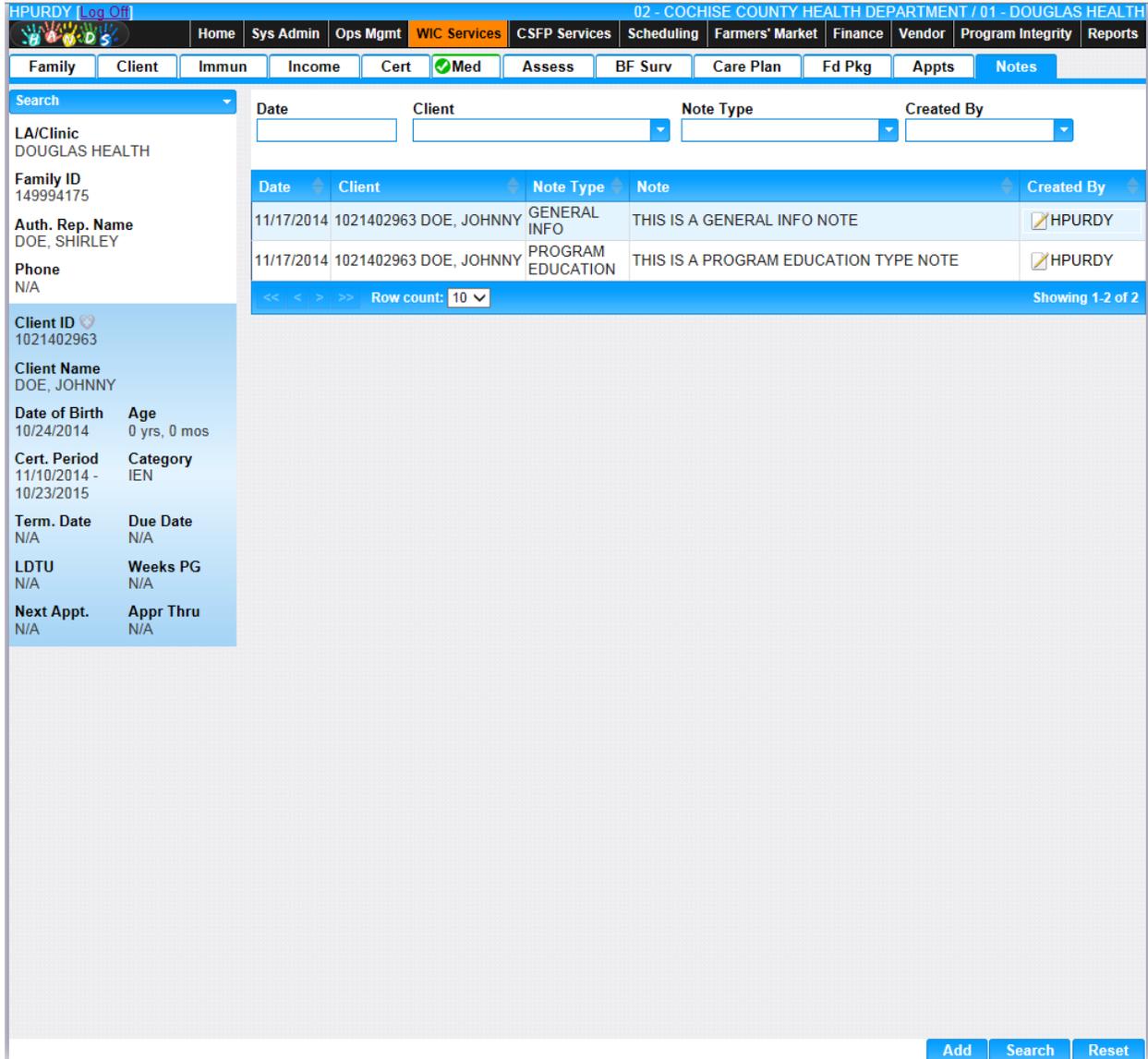
*Calculation(s): None*

*Background Processes: None*

## 7 NOTES

The Notes Tab is located in the WIC Services Module and is where the User can add a Note to the Client’s record. Users are able to categorize the notes using a Note Type. HANDS will display the Notes by date, time and created by. Staff Alerts will be listed first. See Figure 13 below.

*Navigation Path: WIC Service/ Notes*



*Figure 13: Notes page look and feel*

*Fields:*

- **Search Fields:** User is able to search through Notes for each member of the Family by date, Client, Note Type and Staff who created Note. All Search Fields are optional.
  - **Date-** The Date the Note was created.
  - **Client-** Drop down to select the Client that the Note was created for.
  - **Note Type-** Drop down to select the type of Note that was recorded.

- **Created By**- drop down to select the User ID of the staff which created the Note.
- **Date**- The Date the Note was created. This field is display only.
- **Client**- The Client the Note was created for. This field is display only.
- **Note Type**- The type of Note that was recorded. This field is display only
- **Note**- The description of Note. This field is display only.
- **Created By**- The User ID of the staff which created the Note. This field is display only.
-  **(Edit Icon)**- Select to make any changes to Note.

*Buttons:*

- **Add**- Press this button to add a new Note.
- **Search**- Press this button to search for selected criteria.
- **Reset**- Press this button to undo any modifications made to the Notes page since the last Save was performed.

*Calculation(s): None*

*Background Processes: None*

## 7.1 Add a Note

Navigation Path: WIC Services/ Notes/ Add a New Note

The screenshot displays the 'Add a New Note' page in the HANDS WIC System. The top navigation bar includes 'HPURDY Log Off' and '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH'. The main menu has 'WIC Services' highlighted. The sidebar on the left shows client details for 'DOUGLAS HEALTH' with Family ID 149994173, Auth. Rep. Name DOE, JOHN, and Phone N/A. Below this, a blue box contains details for 'DOE, MARIE', including Client ID 1021402959, Client Name DOE, JANE, Date of Birth 10/24/2014 (Age 0 yrs, 0 mos), Cert. Period 11/7/2014 - 10/23/2015 (Category IEN), Term. Date N/A (Due Date N/A), LDTU N/A (Weeks PG N/A), and Next Appt. N/A (Appr Thru N/A). The main form area has two dropdown menus for '\*Client' and '\*Note Type', and a large text area for '\*Note'. At the bottom right, there are 'Save' and 'Reset' buttons.

Figure 14: Adding a New Note

### Fields:

- **Client-** Drop down list to select which Client the Note pertains to. This field is Mandatory.
- **Note Type-** Drop down list to select the Note Type. This field is Mandatory.
- **Note-** Description of the Note. This field is Mandatory.

### Buttons:

- **Save-** Press this button to save any modifications made to the page. Add Page closes and previous page is presented with new Note added to Grid.
- **Reset-** Press this button to undo any modifications made to the Note.

- **Back to List-** Press this button to return to the previous screen where Notes are listed.  
\*Save Confirmation will pop up if there is unsaved Data.

*Calculation(s): None*

*Background Processes: None*

*Note:* Unless the Note is a Staff Alert (see Staff Alerts 7.2), Notes can only be edited on same day and by the same User. Notes can never be deleted.

## 7.2 Staff Alerts

Staff Alerts is a Note Type that can be added to Client’s record. The Staff Alert will be automatically applied to all Clients within that Family. Once a Staff Alert is added, an Icon (🚩) will appear in the active record for every Client within the Family. When User hovers over Icon, a pop up appears that reads “Staff Alert: Please check the clients Notes for Staff Alerts”. By clicking on the Icon, User is brought to the Notes page to view the Staff Alert. By clicking on the ✎ (Edit Icon) for the Staff Alert, the User will be allowed to change the Note Type from a Staff Alert if no longer needed. Once the Note Type is changed, the Note is no longer able to be edited and Alert Icon disappears from the Active Record.

Navigation Path: WIC Services/ Notes/ Staff Alert

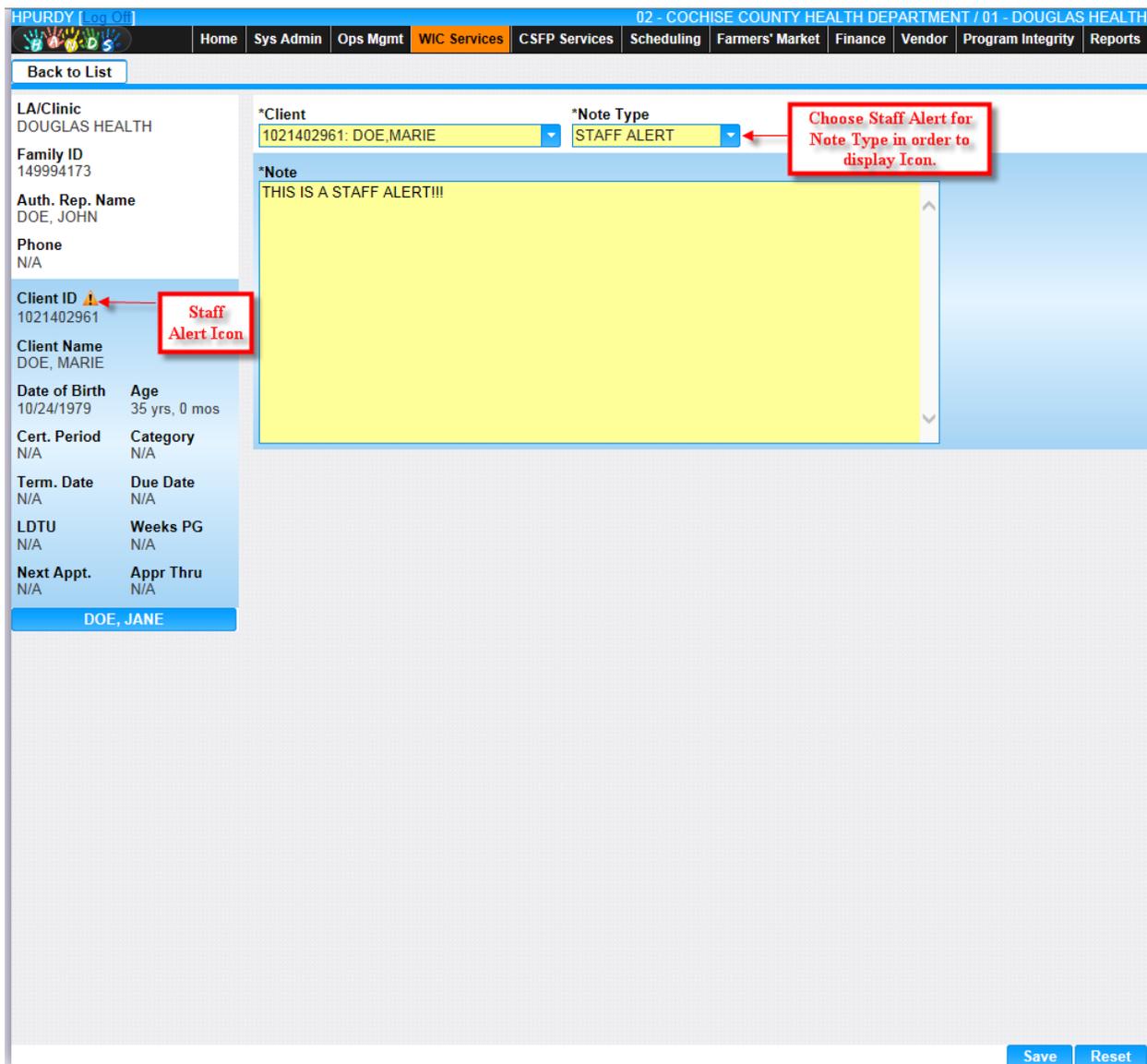


Figure 15: Staff Alert

## 8 BASE TABLES

### 8.1 Risk Factor Types

The Risk Factor Types module allows for configuration of risk factor category types within HANDS.

*Navigation Path: Sys Admin / System Base Tables / Risk Factor Types*

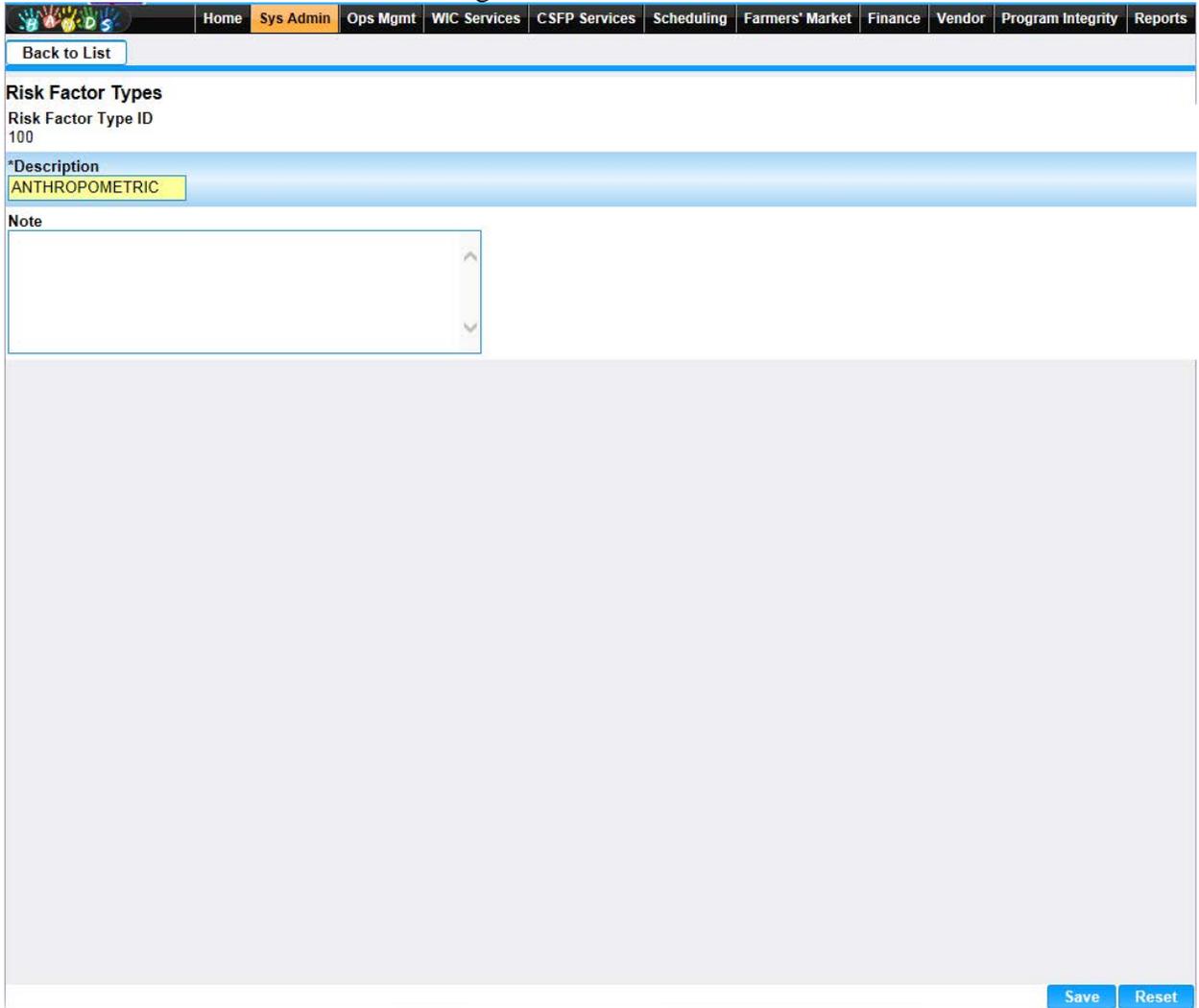
| Risk Factor Type ID | Description  | Date Created | Created By | Date Modified | Modified By | Note |
|---------------------|--|--------------|------------|---------------|-------------|------|
| 100                 | ANTHROPOMETRIC   | 12/28/1999   | WICADM     | 01/12/2000    | WICADM      |      |
| 200                 | BIOCHEMICAL  | 01/12/2000   | WICADM     |               |             |      |
| 300                 | CLINICAL/HEALTH/MEDICAL                                      | 01/12/2000   | WICADM     |               |             |      |
| 400                 | DIETARY  | 01/12/2000   | WICADM     |               |             |      |
| 500                 | REGRESSION/TRANSFER/PRESUMPTIVE ELIGIBILITY                  | 01/12/2000   | WICADM     |               |             |      |
| 600                 | BREASTFEEDING MOTHER/INFANT DIAD                             | 01/12/2000   | WICADM     |               |             |      |
| 700                 | INFANT OF A WIC-ELIGIBLE MOTHER OR MOTHER AT RISK DURING PRE | 01/12/2000   | WICADM     |               |             |      |
| 800                 | HOMELESS/MIGRANCY  | 01/12/2000   | WICADM     |               |             |      |
| 900                 | OTHER NUTRITIONAL RISKS                                      | 01/12/2000   | WICADM     |               |             |      |

*Figure 1: Risk Factor Types*

*Fields:*

- **Risk Factor Type Id** – A user defined number with a maximum length of 4 digits used to uniquely identify the risk factor category type within HANDS.
- **Description** – A verbose description of the risk factor category type.
- **Date Created** – The date when the record was created.
- **Created By** – The User ID of the author who created the record.
- **Date Modified** – The date when the record was last modified.
- **Modified By** – The User ID of the author who last modified the record.

- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



Back to List

**Risk Factor Types**

Risk Factor Type ID  
100

\*Description  
ANTHROPOMETRIC

Note

Save Reset

-  **(Delete Icon)** – When selected navigation will switch to the Delete Screen pre-populated with the details of the record to be deleted.

The screenshot shows a web application interface with a navigation menu at the top containing: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. Below the menu is a 'Back to List' button. The main content area is titled 'Risk Factor Types' and displays a confirmation message: 'Are you sure you want to delete this record?'. Below this message, the record details are shown: 'Risk Factor Type ID' is 100, and '\*Description' is ANTHROPOMETRIC. A 'Note' field is present but empty. At the bottom right of the form, there are two buttons: 'Delete' and 'Cancel'.

*Buttons:*

- **Add** – When selected focus is passed to the Add Risk Factor Types page

The screenshot shows a web application interface for configuring risk factors. At the top, there is a navigation bar with tabs for Home, Sys Admin (selected), Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. Below the navigation bar is a 'Back to List' button. The main content area is titled 'Risk Factor Types' and contains three input fields: '\*Risk Factor Type ID' with the value '0', '\*Description', and a 'Note' text area. At the bottom right of the form, there are 'Save' and 'Reset' buttons.

*Calculation(s): None*

*Background Processes: None*

## 8.2 Risk Factors

The Risk Factors module allows for configuration of risk factors by client category group within HANDS.

*Navigation Path: Sys Admin / System Base Tables / Risk Factors*

The screenshot shows the 'Risk Factors' application interface. At the top is a navigation bar with tabs: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. Below the navigation bar is a 'Risk Factors' dropdown menu. The main section is titled 'Risk Factors' and contains a search form with the following fields: 'Risk Factor ID' (text input), '\*Category Code' (dropdown menu with 'C1-1 YEAR OLD CHILD' selected), 'Risk Factor Type' (dropdown menu), and 'Priority' (dropdown menu). Below the search form are two filter buttons: 'High Risk Only' and 'Active Only'. A '+ Add' button is located in the top right corner of the table area. The table itself has the following columns: ID, Category, Description, Alternate Description, Type, Priority, High Risk, Active, and an edit/delete icon. The table contains 8 rows of data, with the row for ID 354 highlighted in orange.

| ID  | Category            | Description  | Alternate Description   | Type                    | Priority   | High Risk                           | Active                              |  |
|-----|---------------------|--|---|-------------------------|------------|-------------------------------------|-------------------------------------|--|
| 113 | C1-1 YEAR OLD CHILD | BMI / AGE > OR = 95TH % FOR C2 TO C5. NOT VALID FOR C1                         | BMI / AGE > OR = 95TH % FOR C2 TO C5. NOT VALID FOR C1  | ANTHROPOMETRIC          | PRIORITY 3 | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |  |
| 103 | C1-1 YEAR OLD CHILD | BMI AT OR BELOW 10 PERCENTILE WT./HT.  | BMI AT OR BELOW 10 PERCENTILE WT./HT.   | ANTHROPOMETRIC          | PRIORITY 3 | <input type="checkbox"/>            | <input type="checkbox"/>            |  |
| 347 | C1-1 YEAR OLD CHILD | CANCER   | ANY CANCER  | CLINICAL/HEALTH/MEDICAL | PRIORITY 3 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |  |
| 354 | C1-1 YEAR OLD CHILD | CELIAC DISEASE   | ALSO KNOWN AS CELIAC SPRUE, GLUTEN ENTEROPATHY WHICH IS AN AUTOIMMUNE DISEASE IN WHICH PERSON MUST AVOID GLUTEN. THIS IS NOT A FOOD ALLERGY | CLINICAL/HEALTH/MEDICAL | PRIORITY 3 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |  |
| 348 | C1-1 YEAR OLD CHILD | CENTRAL NERVOUS SYSTEM DISORDERS   | EPILEPSY, CEREBRAL PALSY, NEURAL TUBE DEFECTS, PARKINSON'S OR MULTIPLE SCLEROSIS  | CLINICAL/HEALTH/MEDICAL | PRIORITY 3 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |  |
| 381 | C1-1 YEAR OLD CHILD | DENTAL PROBLEMS  | DENTAL CARIES, PERIODONTAL DISEASE, TOOTH LOSS  | CLINICAL/HEALTH/MEDICAL | PRIORITY 3 | <input type="checkbox"/>            | <input checked="" type="checkbox"/> |  |
| 361 | C1-1 YEAR OLD CHILD | DEPRESSION. USDA REMOVED DEPRESSION AS A CHILD RISK FACTOR. 5/20/2014          | DEPRESSION  | CLINICAL/HEALTH/MEDICAL | PRIORITY 3 | <input type="checkbox"/>            | <input type="checkbox"/>            |  |
| 362 | C1-1 YEAR OLD CHILD | DEVELOPMENTAL DELAYS, SENSORY OR MOTOR DELAYS INTERFERING W/THE ABILITY TO EAT | BRAIN INJURY/IMPAIRED FUNCTION, AUTISM, ETC   | CLINICAL/HEALTH/MEDICAL | PRIORITY 3 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |  |
| 343 | C1-1 YEAR OLD CHILD | DIABETES   | TYPE I OR TYPE 2  | CLINICAL/HEALTH/MEDICAL | PRIORITY 3 | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |  |

Figure 2: Risk Factors

Fields:

Search Fields:

- **Risk Factor Id** – The unique ID assigned by the user to the risk factor type.
- **Category Code** – The client category code.
- **Risk Factor Type** – The risk factor category type.
- **Priority** – The priority level of the risk factor.
- **High Risk Only** – Filters the search for records set to high risk only.
- **Active Only** – Filters the search for records set to Active only.
-  **Add** – Add new risk factor via the Add Risk Factor modal.

The screenshot shows a dialog box titled "Add" with a close button in the top right corner. The dialog contains the following fields and controls:

- \*ID**: A text input field.
- \*Category**: A dropdown menu.
- \*Description**: A text area with a vertical scrollbar.
- Alternate Description**: A text area with a vertical scrollbar.
- \*Type**: A dropdown menu.
- \*Priority**: A dropdown menu.
- High Risk**: A checkbox with a blue button labeled "Yes".
- Active**: A checkbox with a blue button labeled "Yes".

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

- **ID** – A user defined string with a maximum length of 8 characters used to uniquely define the risk factor type.
- **Category**– A dropdown list of client category types.
- **Description** – A verbose description of the risk factor type.
- **Alternate Description** – The alternate description of the risk factor.
- **Type** – A dropdown list of risk factor category types.
- **Priority** – A dropdown list of priority types.
- **High Risk** – Check the High Risk box to configure the risk type as high risk.
- **Active** – Check the Active box to make the risk type available within HANDS.

#### Search Grid:

- **ID** – A user defined string with a maximum length of 8 characters used to uniquely define the risk factor type.
- **Category** – The client category types.

- **Description** – A verbose description of the risk factor type.
- **Alternate Description** – The alternative description of the risk factor type.
- **Type** – The risk factor category type.
- **Priority** – The priority type.
- **High Risk** – Indication of if the risk factor is high risk.
- **Active** – Indication of if the risk factor is available within HANDS.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Risk Factor modal.

Edit
✕

**\*ID**

---

**\*Category**

C1-1 YEAR OLD CHILD
▼

---

**\*Description**

BMI / AGE > OR = 95TH % FOR C2 TO C5.  
NOT VALID FOR C1
^  
v

---

**Alternate Description**

BMI / AGE > OR = 95TH % FOR C2 TO C5.  
NOT VALID FOR C1
^  
v

---

**\*Type**

ANTHROPOMETRIC
▼

---

**\*Priority**

PRIORITY 3
▼

---

**High Risk**

✓ Yes

---

**Active**

☐ Yes

---

OK

Cancel

*Buttons:*

- **Search** – Retrieves risk factor records according to the entered search criteria.
- **Save** – The Save button will save edits made to the risk factors configuration.
- **Reset** – The Reset button clears unsaved edits and retrieves the default search of Category Code set to C1-1 YEAR OLD CHILD.

Calculation(s): None

Background Processes: None

### 8.3 Nutrition Education Topics

The Nutr Ed Topics configuration module allows for the configuration of Nutrition Education topics.

Navigation Path: Sys Admin / System Base Tables / Nutr Ed Topics

| Nutr Ed Topic Code | Description                            | WIC Flag | Csf Flag | Date Created | Created By | Date Modified | Modified By | Note   | Exclude Topic | Active Flag |  |
|--------------------|--|----------|----------|--------------|------------|---------------|-------------|--|---------------|-------------|--|
| 31                 | HEALTHY WEIGHT LOSS                    | Y        | N        | 09/17/2001   | RIVEROM    | 05/05/2014    | AGILES      |  | N             | N           |  |
| 32                 | CAFFEINE                               | Y        | N        | 09/17/2001   | RIVEROM    | 05/05/2014    | AGILES      |  | N             | N           |  |
| 33                 | BREASTFEEDING POSITIONING AND LATCH-ON | Y        | N        | 07/09/2002   | LORNELAS   | 05/05/2014    | AGILES      |  | N             | N           |  |
| 34                 | POSTPARTUM ISSUES                      | Y        | N        | 09/17/2001   | RIVEROM    | 05/05/2014    | AGILES      |  | N             | N           |  |
| 35                 | BREASTFEEDING CHALLENGES AND SOLUTIONS | Y        | N        | 09/17/2001   | RIVEROM    | 05/05/2014    | AGILES      |  | N             | N           |  |
| 36                 | CAR SEAT SAFETY                        | Y        | N        | 09/17/2001   | RIVEROM    | 05/05/2014    | AGILES      |  | N             | N           |  |
| 37                 | BABY BOTTLE TOOTH DECAY                | Y        | N        | 09/17/2001   | RIVEROM    | 05/05/2014    | AGILES      |  | N             | N           |  |
| 38                 | INFECTION PREVENTION                   | Y        | N        | 09/17/2001   | RIVEROM    | 05/05/2014    | AGILES      |  | N             | N           |  |
| 39                 | INFANT DEVELOPMENT: FEEDING PRACTICES  | Y        | N        | 09/17/2001   | RIVEROM    | 05/05/2014    | AGILES      | Changed from 'First Years' to 'Feeding Practices' 11/13/07 for Tracker 1305 AB | N             | N           |  |
| 40                 | HOW TO MAKE YOUR OWN BABY FOOD         | Y        | N        | 09/17/2001   | RIVEROM    | 05/05/2014    | AGILES      |  | N             | N           |  |

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[Add](#)

Figure 3: Nutr Ed Topics

Fields:

- **Nutr Ed Topic Code** – A system generated code used to uniquely identify the nutrition education topic.

- **Description** – The verbose description of the nutrition education topic.
- **WIC Flag** – A Yes/No indicator of if the nutrition education topic is relevant to the WIC program.
- **Csf Flag** – A Yes/No indicator of if the nutrition education topic is relevant to the CSFP program.
- **Date Created** – The date when the record was created.
- **Created By** – The User ID of the author who created the record.
- **Date Modified** – The date when the record was last modified.
- **Modified By** – The User ID of the author who last modified the record.
- **Note** – A free text field used for storing notes specific to the record.
- **Exclude Topic** –
- **Active Flag** – A Yes/No indicator of if the nutrition education topic type is active.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.

The screenshot shows the 'Nutr Ed Topics' form. At the top, there is a navigation bar with tabs: Home, Sys Admin (selected), Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. Below the navigation bar is a 'Back to List' button. The main form area is titled 'Nutr Ed Topics' and contains the following fields:

- Nutr Ed Topic Code:** 10
- \*Description:** A text area containing 'BREASTFEEDING COMPLICATION(S)'.
- \*WIC Flag:** A dropdown menu with 'YES' selected.
- \*Csf Flag:** A dropdown menu with 'NO' selected.
- Note:** An empty text area.
- \*Exclude Topic:** A dropdown menu with 'NO' selected.
- \*Active Flag:** A dropdown menu with 'NO' selected.

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

-  **(Delete Icon)** – When selected navigation will switch to the Delete Screen pre-populated with the details of the record to be deleted.

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

Back to List

**Nutr Ed Topics**  
Are you sure you want to delete this record?  
Nutr Ed Topic Code  
10

\*Description  
BREASTFEEDING COMPLICATION(S)

\*WIC Flag  
YES

\*Csf Flag  
NO

Note

\*Exclude Topic  
NO

\*Active Flag  
NO

Delete Cancel

*Buttons:*

- **Add** – When selected focus is passed to the Add Nutr Ed Topics page

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

Back to List

**Nutr Ed Topics**

\*Description

\*WIC Flag  
NOT SET

\*Csf Flag  
NOT SET

Note

\*Exclude Topic  
NOT SET

\*Active Flag  
NOT SET

Save Reset

*Calculation(s): None*

*Background Processes: None*

## 8.4 Note Types

The Notes Types configuration module allows for the configuration of note types.

*Navigation Path: Sys Admin / System Base Tables / Note Types*

| Family Flag | Staff Alert Flag | Nt ID | Note Type Desc    | Active Flag | Date Created | Created By     | Date Modified | Modified By |  |
|-------------|------------------|-------|-------------------|-------------|--------------|----------------|---------------|-------------|--|
| N           | N                | 44    | GENERAL INFO      | Y           | 09/09/2013   | HANDSUSERNAME3 | 05/14/2014    | MNUNEZ      |  |
| N           | N                | 46    | NCP/PES/SOAP      | Y           | 09/09/2013   | HANDSUSERNAME3 | 05/21/2014    | MNUNEZ      |  |
| N           | N                | 49    | PEER COUNSELOR    | Y           | 09/09/2013   | HANDSUSERNAME3 | 05/21/2014    | MNUNEZ      |  |
| Y           | Y                | 50    | STAFF ALERT       | Y           | 09/09/2013   | HANDSUSERNAME3 | 05/14/2014    | MNUNEZ      |  |
| N           | N                | 51    | PROXY             | Y           | 09/09/2013   | HANDSUSERNAME3 | 05/14/2014    | MNUNEZ      |  |
| N           | N                | 52    | TGIF              | Y           | 09/09/2013   | HANDSUSERNAME3 | 05/14/2014    | MNUNEZ      |  |
| N           | N                | 54    | PROGRAM EDUCATION | Y           | 09/09/2013   | HANDSUSERNAME3 | 05/22/2014    | TJOHNSON    |  |
| N           | N                | 14    | CSFP              | Y           | 10/08/2013   | HANDSUSERNAME3 | 09/16/2014    | JSURLS      |  |

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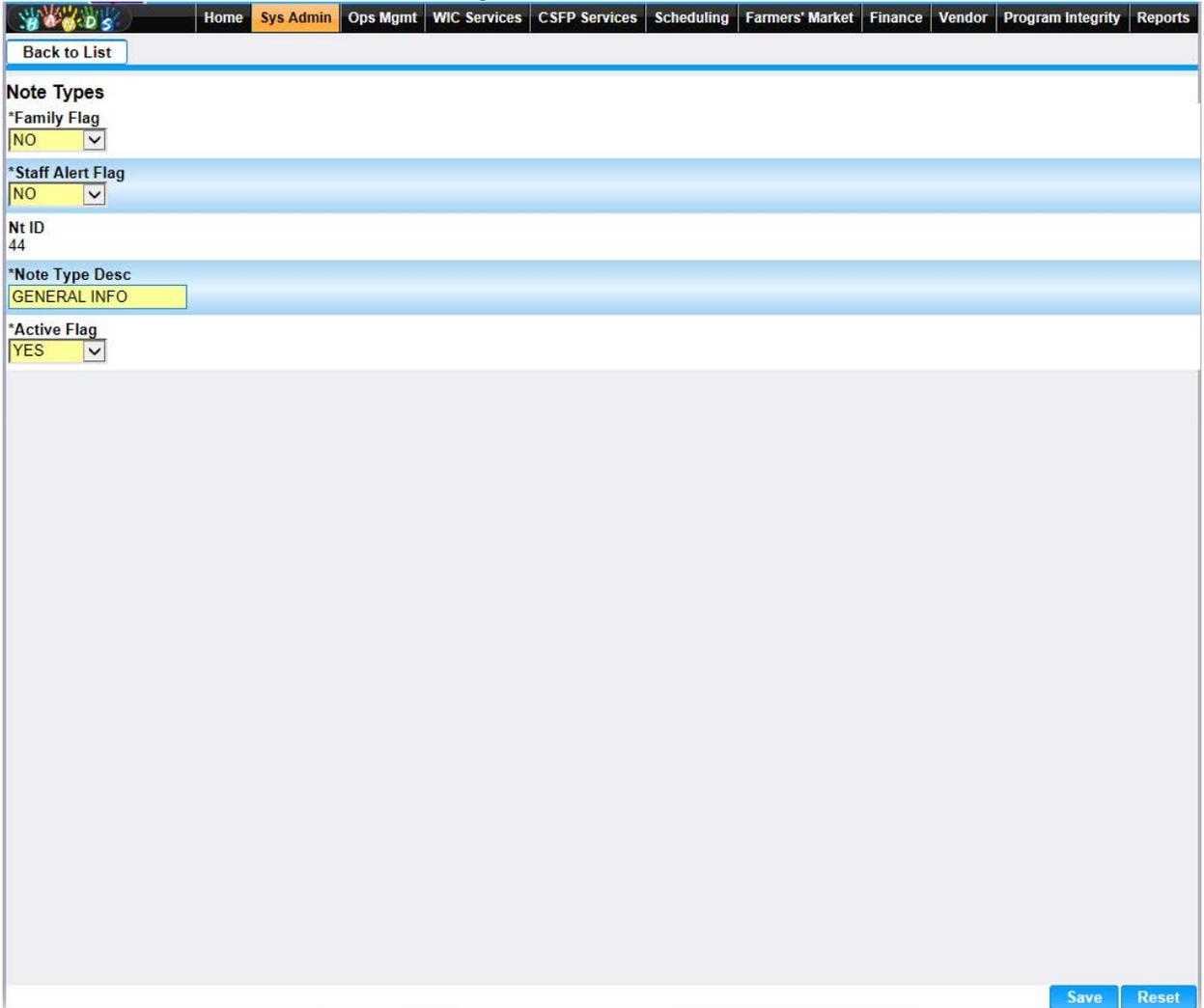
[Add](#)

*Figure 4: Note Types*

*Fields:*

- **Family Flag** – A Yes/No indicator of if the note type is associated with a family
- **Staff Alert Flag** – A Yes/No indicator if the note type should raise an alert to other staff members.
- **Nt ID** – The system generated id used to uniquely define the note type within HANDS.
- **Note Type Desc** – The verbose description of the note type.
- **Active Flag** – A Yes/No indicator of if the note type active.
- **Date Created** – The date when the record was created.
- **Created By** – The User ID of the author who created the record.
- **Date Modified** – The date when the record was last modified.
- **Modified By** – The User ID of the author who last modified the record.

-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



The screenshot displays a web application interface for editing a record. At the top, there is a navigation menu with tabs: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. Below the menu is a 'Back to List' button. The main content area contains the following fields:

- Note Types**
- \*Family Flag: NO (dropdown menu)
- \*Staff Alert Flag: NO (dropdown menu)
- Nt ID: 44
- \*Note Type Desc: GENERAL INFO
- \*Active Flag: YES (dropdown menu)

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

-  **(Delete Icon)** – When selected navigation will switch to the Delete Screen pre-populated with the details of the record to be deleted.

The screenshot shows a web application interface with a navigation menu at the top containing: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. Below the menu is a 'Back to List' button. The main content area displays a confirmation dialog titled 'Note Types' with the question 'Are you sure you want to delete this record?'. The dialog contains the following fields: '\*Family Flag' with a dropdown menu set to 'NO'; '\*Staff Alert Flag' with a dropdown menu set to 'NO'; 'Nt ID' with the value '44'; '\*Note Type Desc' with a dropdown menu set to 'GENERAL INFO'; and '\*Active Flag' with a dropdown menu set to 'YES'. At the bottom right of the dialog are two buttons: 'Delete' and 'Cancel'.

*Buttons:*

- **Add** – When selected focus is passed to the Add Notes Types page

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

Back to List

**Note Types**

\*Family Flag  
NOT SET

\*Staff Alert Flag  
NOT SET

\*Note Type Desc  
[Text Input Field]

\*Active Flag  
NOT SET

Save Reset

*Calculation(s): None*

*Background Processes: None*