Arizona Department of Health Services

Bureau of Nutrition and Physical Activity

HANDS WIC System

Detailed Functional Design Document

Certification & Enrollment

August 5, 2020

Version 2.5

Table of Contents

REVISION HISTORY

The chart below indicates revisions made to this document:

Version	Name	Brief Description of Change	Published
1.0	Jonathan Ernest	Initial Draft	01-30-2015
1.1	Chris Walker	Additional notes added to the Appointment Reminder Preference field descriptions.	06-05-2015
1.2	Cecilia Romo-Thompson	Updates for December 2015 release	
2.0	Kristina Murray	Updates to include eWIC functionality	08-22-2017
2.1	Alex Hart	Updates to include Oct. 2018 Release	09-10-2018
2.2	Heather Purdy	Updates to Include Sept 2019 Release and Document Refresh overhaul	09-26-2019
2.3	Alappakkam Sriram	Added a new section 15 for Participant Portal	01-18-2020
2.4	Lisa A Jakubowski	Updates for Dynamsoft scan functionality	07-30-2020
2.5	Heather Purdy	Updates to Cert end date calculation charts	07-31-2020

1 CLIENT/FAMILY SEARCH PAGE

Narrative:
The purpose of this page is to search for Clients and/or Families already entered in the Woman, Infant, and Children (WIC) system by using any of the search criteria fields located at the top of the page.

The user can find desired Client or Family records by entering known Client and/or Family data into the search criteria fields and pressing the search button. The more information provided, the narrower the search will be. (If a last name was the only piece of information entered, the system will retrieve all Client records possessing the same last name with their corresponding information.) Additionally, the eWIC card number search field displays for those clinics which have been flagged as an eWIC Clinic in Organizational Units base table.

Figure 1: Organizational Units Base Table – eWIC Clinic Flag

Should there be more than two Clients with similar pieces of initial information; the user may expand the record and view more information by clicking the plus sign to the left of the Client ID field. The plus sign will become a minus sign once the record information is expanded. The user then simply clicks the minus sign to minimize the additional Client and Family information.

Once the appropriate Client ID record is located, the user may click on the **(Edit Icon)** for either the Client ID field which brings up the Client Information page or the Family ID field which will bring up the Family Information page.

In cases in which the user desires to access the Client/Family Search Page from another page in the system they can simply click the WIC Services tab in the black top menu bar. Clicking the tab will bring the user quickly to the Client/Family Search Page from anywhere in the system. The user may also click Search from the Navigation Pick List in the left navigation rail to go directly to the Search screen from any page under WIC Services module.

Navigation Path: WIC Services tab | Client/Family Search Page

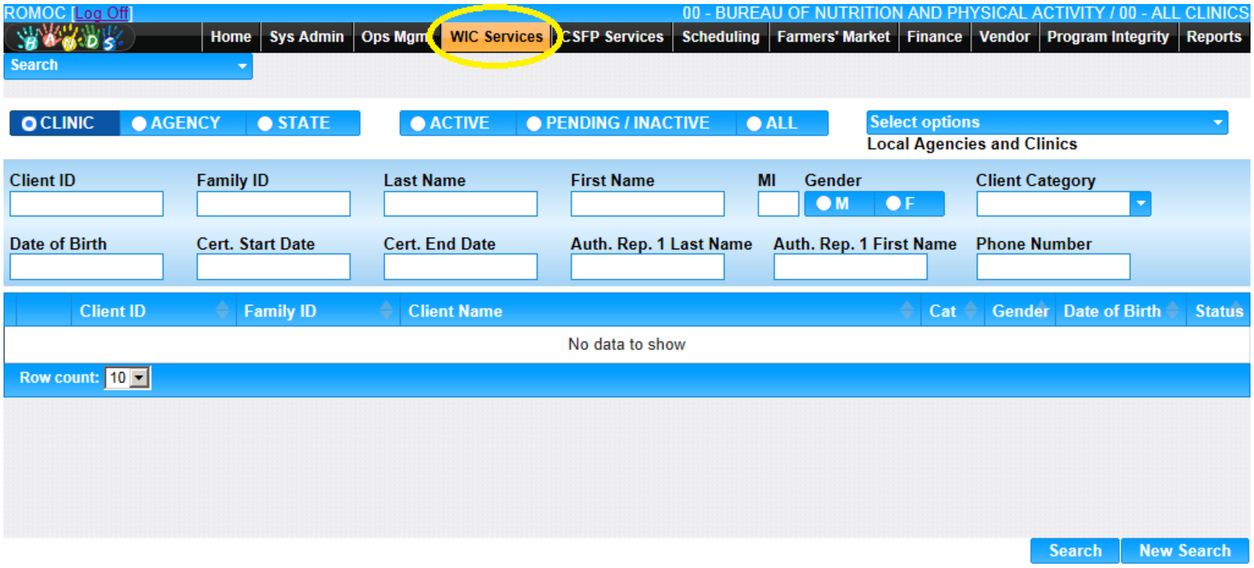


Figure 2: Client/Family Search Page (FI)

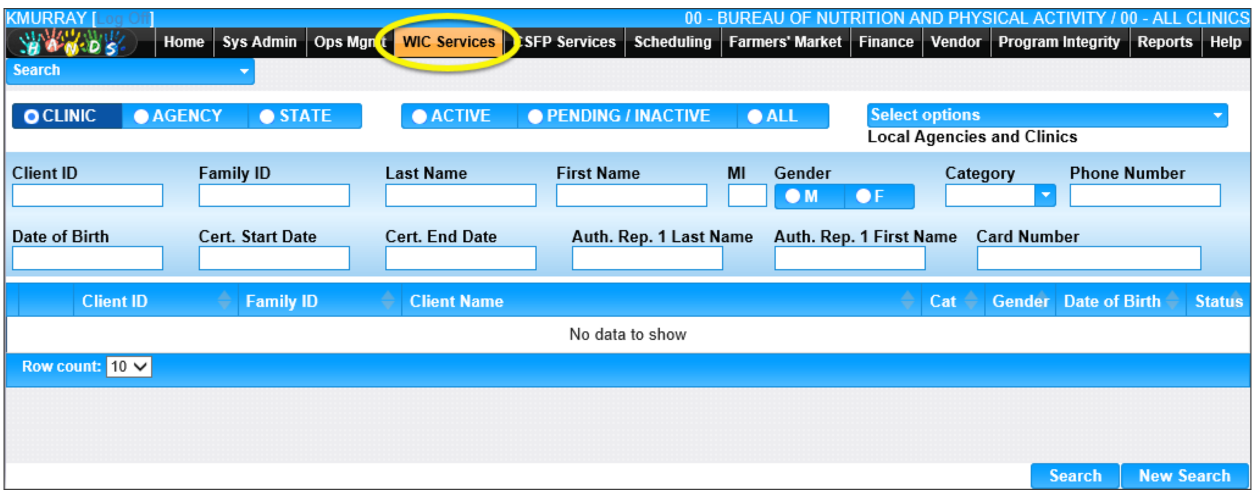


Figure 3: Client/Family Search Page (eWIC)

Fields:

- **Clinic, Agency, State –** The organizational unit to search.
- **Active, Pending / Inactive, All –** The current certification status of the Client to search.
- **Local Agencies and Clinics** - The organizational unit that serves as the Local Agency and Clinics that the Family is registered in. This field is optional and is selected from a drop down list. *This field is only available when logged in at the State level.* For more information, see the Organizational Units section in the Operations Management DFDD.
- **Client ID -** A unique, system generated identification number for the Client. This field is optional.
- **Family ID** - A unique, system generated identification number for the Family. This field is optional.

- **Last Name -** The last name of the Client. This field is optional.
- **First Name -** The first name of the Client. This field is optional.
- **MI** - The middle initial of the Client. This field is optional.
- **Client Category** - The category that the Client belongs to. This field is optional and is selected from a drop down list. For more information, see the Certification Action and Category base table sections of this document.
- **Phone Number –** The telephone number of the Family. This field is optional. For more information, see background process number one.
- **Birth Date** - The birth date of the Client. This field is optional.
- **Cert. Start Date -** The starting date of the most recent certification. This field is optional.
- **Cert. End Date -** The ending date of the most recent certification. This field is optional.
- **Auth. Rep. 1 Last Name -** The last name of the first authorized representative for the Family. This field is optional.
- **Auth. Rep. 1 First Name -** The first name of the first authorized representative for the Family. This field is optional.
- **Card Number -** The eWIC card number for the Family. This field is optional.

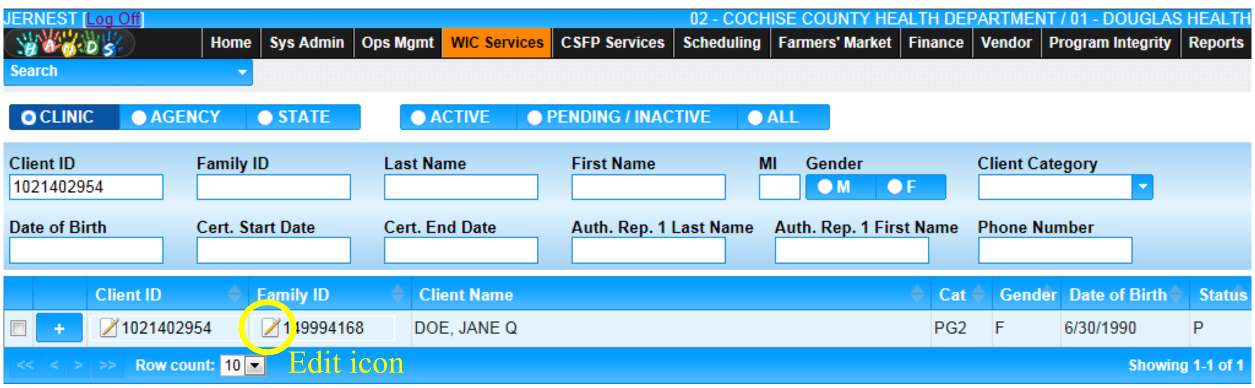


Figure 4: Client/Family Search Results (FI)

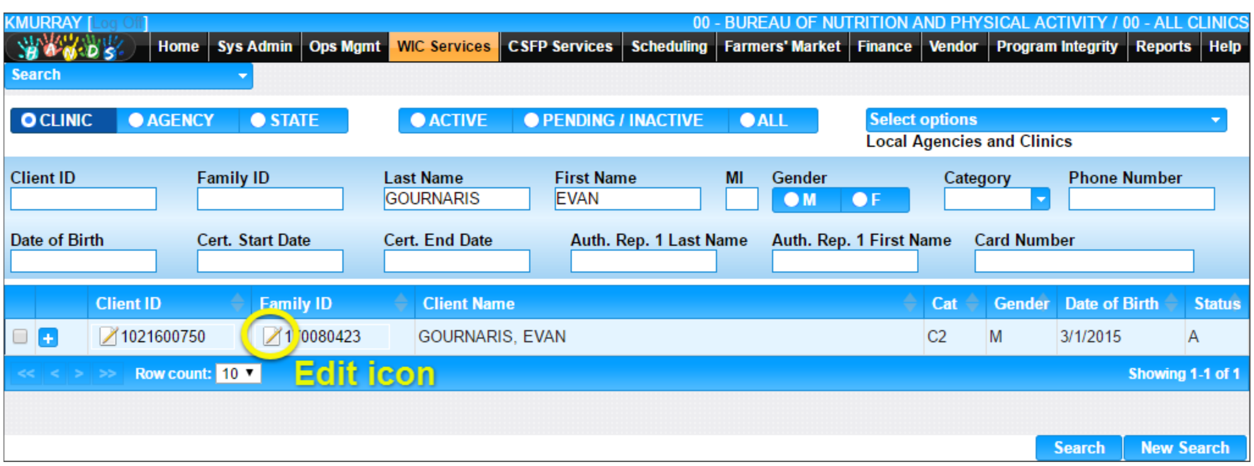


Figure 5: Client/Family Search Results (eWIC)

Fields (Results section):

- **Family ID -** A unique, system generated identification number for the Family. This field is display only. This field is displayed in blue for CSFP Clients. Clicking the **(Edit Icon)** brings up the Family Information page. For more information, see the Family Information section of this document.
- **Client ID -** The unique, system generated identification number for the Client. This field is display only. This field is displayed in red for deceased Clients. This field is displayed in blue for CSFP Clients. Clicking the **(Edit Icon)** brings up the Client Information page. For more information, see the Client Information section of this document. *NOTE: For more information on CSFP Clients, see the CSFP DFDD.*
- **Client Name -** The last name, first name, and middle initial of the Client. This field is display only.
- **Cat.** - The category that the Client belongs to. This field is display only. For more information, see the Certification Action and Category base table sections of this document.
- **Gender** - The gender of the Client. This field is display only.
- **Birth Date** - The birth date of the Client. This field is display only.
- **Status -** The current certification status of the Client. This field is display only. For more information, see the Certification Action section of this document.

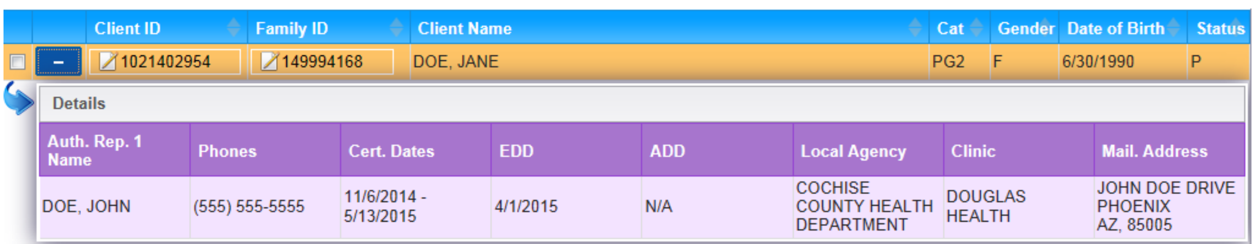


Figure 6: Client/Family Expanded Search Results

Fields (Expanded Search Results section):

- **Auth. Rep. 1 Name -** The last name, first name, and middle initial of the first authorized representative. This field is display only.
- **Phones -** All phone numbers that have been entered for the Family. If no phone number exists then N/A will be displayed. This field is display only.
- **Cert. Dates -** The most recent certification for the Client. This field is display only.
- **EDD -** The expected delivery date for the Client. This field is display only.
- **ADD** - The actual delivery date for the Client. This field is display only.
- **Local Agency -** The organizational unit that serves as the Local Agency that the Family is registered in. This field is display only.
- **Clinic -** The organizational unit that serves as the Clinic that the Family is registered in. This field is display only.
- **Mail. Address -** The mailing address for the Family. This field is display only.

Buttons:

- **Gender** - Selection options (M and F) to determine the gender of the Client.

- **Agency/Clinic/Statewide -** Selection options (Clinic, Agency, and Statewide) to determine the demographic range of the search results returned. For more information, see background process number two.
- **Active/Inactive/All -** Selection options (Active, Pending/Inactive, All) to determine the certification status of Client records being returned.
- **Schedule Appts -** Press this button to navigate directly to the Appointment Scheduler. This button will not display on the page if the user is not logged into a specific clinic. For more information, see the Appointment Scheduler DFDD.
- **Add a New Family -** Press this button to bring up the New Family page. This button will not display on the page if the user is not logged into a specific clinic. For more information, see the Family Information section of this document.
- **Trans Family -** Press this button to transfer a Family. This button will not display on the page if the user is not logged into a specific clinic.
- **Trans Client -** Press this button to transfer a Client. This button will not display on the page if the user is not logged into a specific clinic.
- **Out of State Trans -** Press this button to bring up the Out of State Transfer process. This button will not display on the page if the user is not logged into a specific clinic.

NOTE: For more information on the transfer process, see the transfer section of this document.

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

Calculation(s): None

Background Processes:

1) Searching by a phone number will return all Client records that match the phone number entered. The query will look at all numbers entered for the family if multiple exist.
2) Users logged in at the State Agency level will be able to view all Client and Family records throughout the system in a “view only” state. Users logged in at the Local Agency level will be able to view all Client and Family records in their Agency in a “view only” state. Users logged in at the Clinic level will only be able to access those Client and Family records located in their Clinic. However, by using the Agency/Clinic/Statewide buttons the user will have access to all Client and Family records throughout the system. The user will not be able to view any other Client or Family data then the data displayed in the above figure. Also the **(Edit Icon)** will not display for these Client/Family records.
3) For partial match searches, the ‘wildcard’ will be assumed on the end of the search. A “starts with” process will be on each field. If a query is executed and no matches are found, the criteria entered remains on the screen, the cursor remains in the criteria field, and the results section of the screen display a “No data to show” message. If no criteria are entered and the query is executed, the system retrieves all Clients in the database.
4) When searching by Client ID, an acceptable number must be entered or the user will receive an error stating “The Client ID field must be an acceptable number”.

2 FAMILY INFORMATION PAGE

Narrative:
The purpose of this page is to capture and maintain basic demographic data relative to a Family. The user can add a new Family to the system by clicking the Add a New Family button from the Client/Family Search page. They also have the ability to view families that are already in the system by searching for them using the Client/Family Search page and clicking the **(Edit Icon)** on the Family ID field. The Family is used to connect related Clients with the same authorized representatives.

2.1 Add a New Family Page

Navigation Path: WIC Services tab | Client/Family Search | Add a New Family

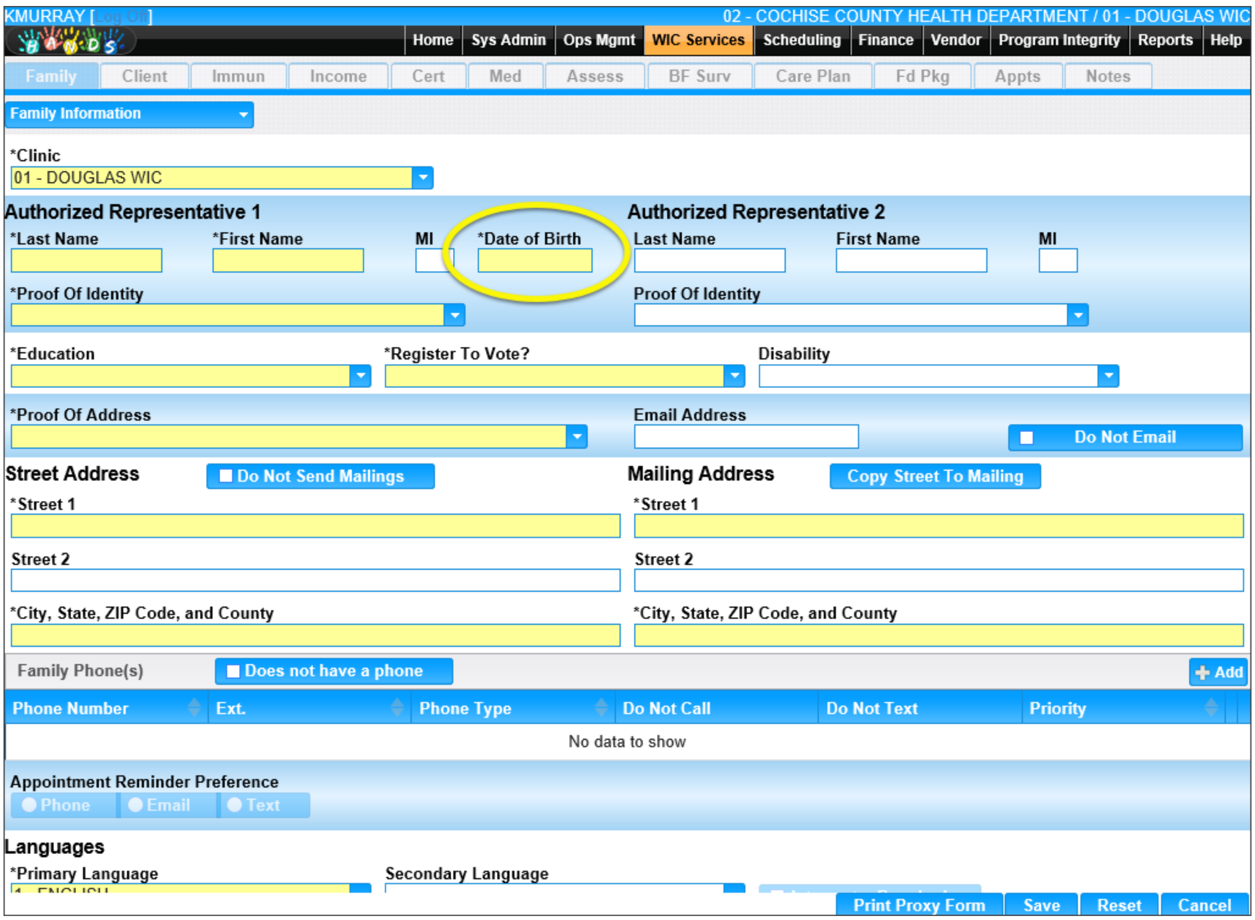


Figure 7: Add a New Family Page

Fields:

- **Clinic** – The organizational unit that serves as the Clinic that the Family is registered in. This field is mandatory and defaults to the logged in Clinic. Users are only able to add new families when logged into a specific Clinic.

- **Authorized Representative 1:**

  - **Last Name –** The last name of the first authorized representative. This field is mandatory.
  - **First Name –** The first name of the first authorized representative. This field is mandatory.
  - **MI –** The middle initial of the first authorized representative. This field is optional.
  - **Date of Birth –** The date of birth of the first authorized representative. This field is mandatory and stored in the format of MM/DD/YYYY. The user can either select the date from the calendar wizard provided or by manually entering the date. When manually entering the date the user does not need to enter the forward slash (/) it will be automatically populated.
  - **Proof Of Identity –** The proof of identity of the first authorized representative. This field is mandatory and is selected from a drop down list. For more information, see the Proof Identities base table section of this document.

- **Authorized Representative 2:**
  - **Last Name –** The last name of the second authorized representative. This field is mandatory if data is entered into any of the authorized representative two fields. Otherwise, this field is optional.
  - **First Name –** The first name of the second authorized representative. This field is optional.
  - **MI –** The middle initial of the second authorized representative. This field is optional.
  - **Proof Of Identity –** The proof of identity of the second authorized representative. This field is mandatory if data is entered in any of the authorized representative two fields. Otherwise, this field is optional. It is selected from a drop down list. For more information, see the Proof Identities base table section of this document.

- **Education –** The education level of the first authorized representative. This field is mandatory and selected from a drop down list. For more information, see the Education Levels base table section of this document.

- **Register To Vote? –** The voter registration status of the first authorized representative. This field is mandatory and selected from a drop down list. For more information, see the Voter Registrations base table section of this document.

- **Disability –** The disability of the first authorized. This field is optional and selected from a drop down list. For more information, see the Disabilities base table section of this document.

- **Proof Of Address –** The proof of address of the first authorized representative. This field is mandatory and selected from a drop down list. For more information, see the Proof of Address base table section of this document.
- **Email Address –** The email address of the first authorized representative. This field is optional.

- **Do Not Email –** A checkbox to determine if the Family wishes to receive emails. If the checkbox is checked then the Family does not wish to receive any emails. If the checkbox is unchecked then the Family agrees to receive emails.

- **Do Not Send Mailings –** A checkbox to determine if the Family wishes to receive mailings to the first addresses listed. If the checkbox is checked then the Family does not wish to receive any mailings. If the checkbox is unchecked then the Family agrees to receive mailings.

- **Street Address:**
  - **Street 1 –** The first street address of the Family. This field is mandatory.
  - **Street 2 –** The second street address of the Family. This field is optional.
  - **City, State, ZIP Code, and County –** The City, State, ZIP Code, and County combination for the first street address of the Family. This field is mandatory and selected from a drop down list. Any portion of this field (i.e. State or ZIP Code) can be manually entered. Possible field values will be available for selection within the drop down as characters are entered. For more information, see the GEO Location base table section of this document.

- **Mailing Address:**
  - **Street 1 –** The first mailing address of the Family. This field is mandatory.
  - **Street 2 –** The second mailing address of the Family. This field is mandatory.
  - **City, State, ZIP Code, and County –** The City, State, ZIP Code, and County combination for the first mailing address of the Family. This field is mandatory and selected from a drop down list. Any portion of this field (i.e. State or ZIP Code) can be manually entered. Possible field values will be available for selection within the drop down as characters are entered. For more information, see the GEO Location base table section of this document.

- **Family Phone(s) Grid:** A grid used to display all phone numbers listed for the Family.
  - **Phone Number –** The ten digit number listed. This field is display only.
  - **Ext. –** The extension of the number listed. This field is display only.
  - **Phone Type –** The type of the number listed. This field is display only.
  - **Do Not Call –** A checkbox to determine if user is allowed to call the phone number listed. This field is display only. If the checkbox is checked then the user cannot call the Family using this number. If the checkbox is unchecked then the user is allowed to call the Family using this number.
  - **Do Not Text –** A checkbox to determine if user is allowed to text the phone number listed. This field is display only. If the checkbox is checked then the user cannot text the Family using this number. If the checkbox is unchecked then the user is allowed to text the Family using this number.
  - **Priority –** The priority of the phone number listed. This field is display only. At least one phone number must have the priority of primary.

- **Languages:**

  - **Primary Language –** The primary language of the first authorized representative. This field is mandatory, will default to English, and is selected from a drop down list.
  - **Secondary Language –** The secondary language of the first authorized representative. This field is optional and is selected from a drop down list.

NOTE: For more information on languages, see the Languages base table section of this document.

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

- **Proxy 1:**
  - **Last Name –** The last name of the first proxy for the Family. This field is mandatory if data is entered into any of the other proxy one fields. Otherwise, this field is optional.
  - **First Name –** The first name of the first proxy for the Family. This field is mandatory if data is entered into any of the other proxy one fields. Otherwise, this field is optional.
  - **MI –** The middle initial of the first proxy for the Family. This field is optional.
  - **Proof Of Identity –** The proof of identity of the first proxy for the Family. This field is mandatory if data is entered into any of the other proxy one fields. Otherwise, this field is optional. It is selected from a drop down list. For more information, see the Proof Identities base table section of this document.

- **Proxy 2:**
  - **Last Name –** The last name of the second proxy for the Family. This field is mandatory if data is entered into any of the other proxy two fields. Otherwise, this field is optional
  - **First Name –** The first name of the second proxy for the Family. This field is mandatory if data is entered into any of the other proxy two fields. Otherwise, this field is optional.
  - **MI –** The middle initial of the second proxy for the Family. This field is optional.
  - **Proof Of Identity -** The proof of identity of the second proxy for the Family. This field is mandatory if data is entered into any of the other proxy two fields. Otherwise, this field is optional. It is selected from a drop down list. For more information, see the Proof Identities base table section of this document.

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

Buttons:

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

(Add) – Click the Add button to display the add modal and add records to the Family Phones(s) grid.

Navigation Path: WIC Services tab | Client/Family Search | Add a New Family Information | Add a Phone Number

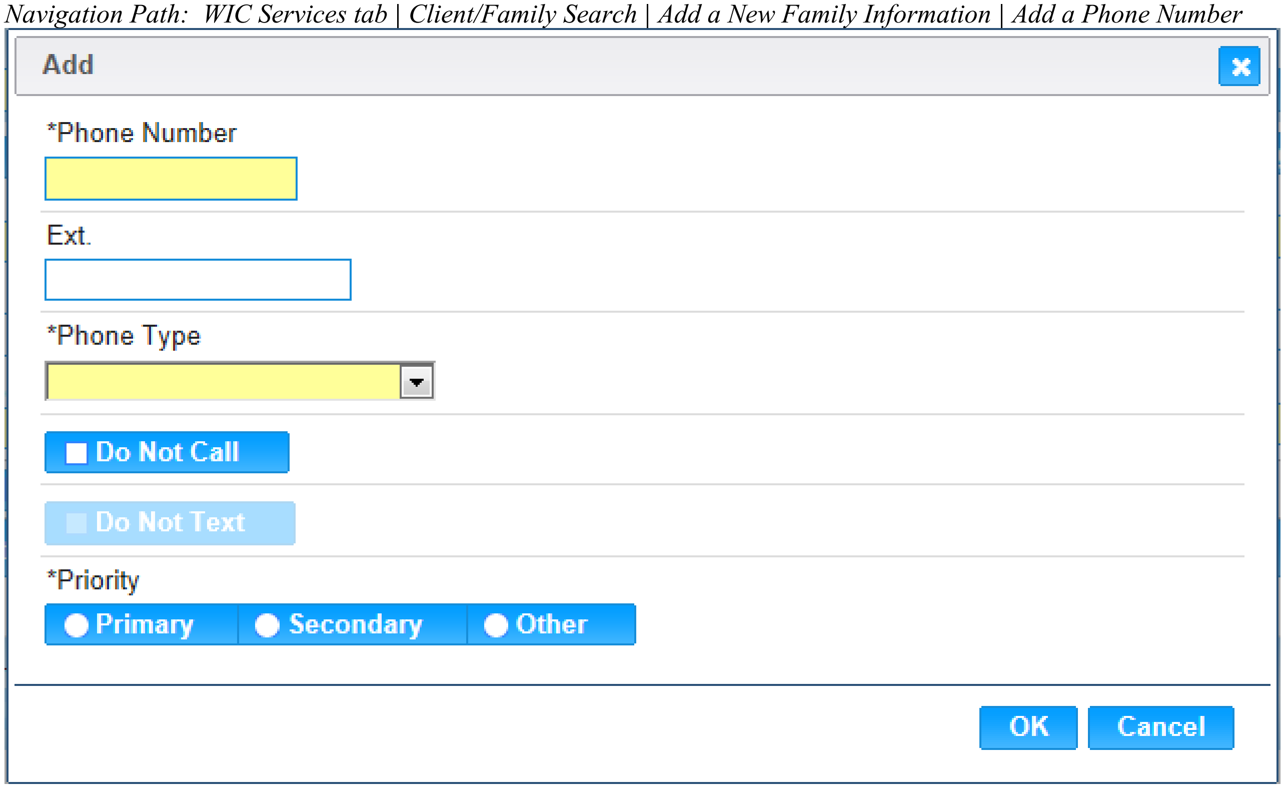


Figure 8: Add a Phone Modal

Fields (Add a Phone Modal):

- **Phone Number –** The ten digit number being entered. This field is mandatory.
- **Ext. –** The extension of the number being entered. This field is optional.
- **Phone Type –** The type of number being entered. This field is mandatory and selected from a drop down list. For more information, see the Phone Types base table section of this document.

- **Do Not Call –** A checkbox to determine if user is allowed to call the phone number listed. This field is optional. If the checkbox is checked then the user cannot call the Family using this number. If the checkbox is unchecked then the user is allowed to call the Family using this number.
- **Do Not Text –** A checkbox to determine if user is allowed to text the phone number listed. This field is optional. If the checkbox is checked then the user cannot text the Family using this number. If the checkbox is unchecked then the user is allowed to text the Family using this number. This field will be greyed out unless the phone type being entered is cell phone.
- **Priority –** Selection options (Primary, Secondary, and Other) to determine the priority of the number being entered. This field is mandatory. One number listed for the Family must have the priority of primary. After the button is clicked additional changes made to the street address fields will not be reflected in the mailing address fields unless the button is clicked again.

Buttons (Add a Phone Modal):

- **OK –** Press this button to close the modal and add a new unsaved record to grid.

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

- **(Close Window) –** The modal is closed without adding a new record to the grid.

- **(Edit Icon) –** Press this button to open up the edit page to allow for desired modifications to an existing record.

- **(Delete Icon) –** Press this button to remove an existing record.
  NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Appointment Reminder Preference –** Selection options (Phone, Email, and Text) to determine the Family's appointment reminder preference. For more information, see the Appointment Scheduler DFD.
  Note 1 - This field is optional and only 1 Appointment Reminder Preference may be configured for the Family.
  Note 2 – A Phone must be configured for the client in order for the Appointment Reminder Preference "Phone" box to be enabled for selection.
  Note 3 – A Phone with Phone Type "CP - CELL PHONE" must be configured for the client and the "Appointment Reminder – Text" option must be selected via the State Configuration Settings[1] base table in order for the Appointment Reminder Preference "Text" box to be enabled for selection.
  Note 4 – An Email Address must be configured for the client and the "Appointment Reminder – Email" option must be selected via the State Configuration Settings[2] base

[1] Refer to the HANDS DFDD System Administration document for further details.
[2] Refer to the HANDS DFDD System Administration document for further details.

table in order for the Appointment Reminder Preference "Email" box to be enabled for selection.

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

Navigation Path: WIC Services tab | Client/Family Search | Add a New Family Information | Add a How did you hear about WIC?

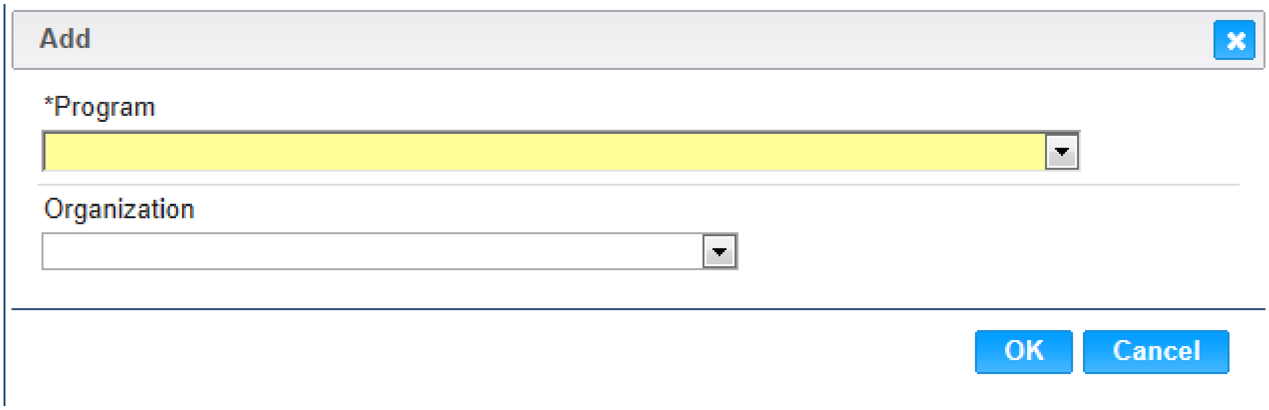


Figure 9: Add a How did you hear about WIC? Modal

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

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

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

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

- **OK** – Press this button to close the modal and add a new unsaved record to grid.

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

- **(Close Window)** – The modal is closed without adding a new record to the grid.

- **(Edit Icon)** – Press this button to open up the edit page to allow for desired modifications to an existing record.

- **(Delete Icon)** – Press this button to remove an existing record.
  NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Print Proxy Form** – Press this button to populate the WIC proxy form modal. For more information, see the Forms section of this document.

- **Save –** Press this button to save changes made to the page. For more information, see background process number four.

- **Reset –** Press this button to return the page to its original state without any changes being saved.
- **Cancel –** Press this button to close the page and return the user to the Client/Family Search page without a new Family record being added to the system.

Calculation(s): None

Background Processes:

1) A user may enter only one number with the priority of primary and one as secondary. As many numbers as desired may be entered that have a priority of other.
2) The phone appointment reminder preference option will be disabled if no phone number is listed or the do not call checkbox is checked for all numbers listed for the Family. The email option will be disabled if no email address is entered or the do not email checkbox is checked for the Family. The text option will be disabled if no number exists with the phone type of cell phone or the do not text checkbox is checked for the Family.
3) The majority of forms will be in both English and Spanish. If populated while in a Client record, forms will populate in the primary language of the Family (Spanish or English only). If the primary language is something other than Spanish or English, the default language will be English. For more information, see the Forms section of this document.
4) The system performs a four step save process when saving a new Family:
    a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be displayed.
    b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be displayed.
    c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be displayed.
    d. Finally, after the other three steps have been completed successfully the system assigns a unique system generated Family ID to the Family and adds the Family data to the database. The Family ID format is FY9999999. The first two digits are dependent on the fiscal year from the Budgeting Factors table. The remaining seven digits are a unique system generated sequence that is incremented by one after each new Family creation. For more information, see the Budgeting Factors section of the FNS-798 DFDD.
    NOTE: If the Budgeting Factor table for the current fiscal year is not configured the creation of the Family ID will fail.

2.2 Edit a Family Page

Navigation Path: WIC Services tab | Client/Family Search | Edit a Family

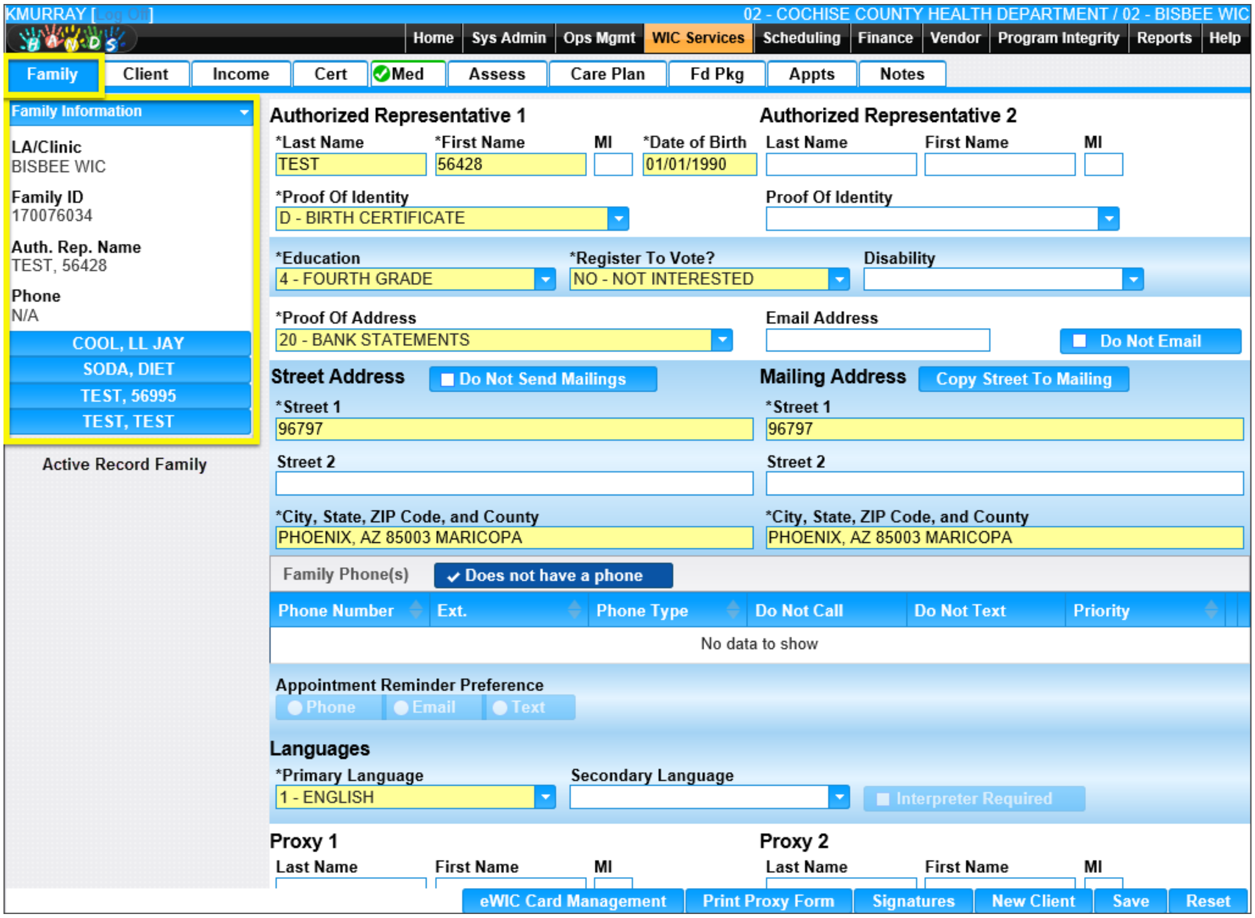


Figure 10: Edit a Family Page

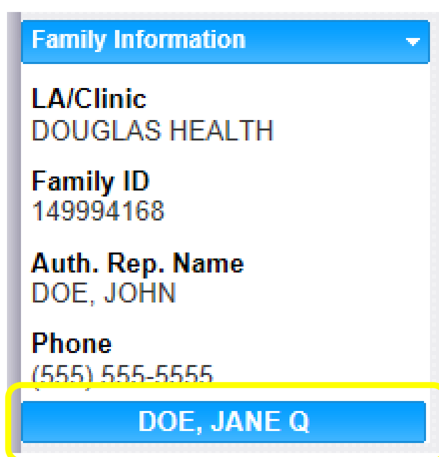


Figure 11: Switch Between Clients

Fields (Active Record Family):

- **Navigation drop down list** – A drop down list that displays the page the user is on. This drop down list can be used as another means of navigation throughout the system. For more information, see the Navigation drop down list section of the General Requirements DFDD.

- **LA/Clinic –** The organizational unit that serves as the Clinic that the Family is registered in. This field is display only.

- **Family ID –** The unique, system generated identification number for the Family that was assigned on creation. This field is display only.

- **Auth. Rep. Name –** The last name, first name, and middle initial of the first authorized representative. This field is display only.

- **Phone –** The primary phone number for the Family. If no phone exists then N/A will be displayed. This field is display only.

Buttons (Active Record Family):
- **Switch between Clients –** Press this button to navigate to the Client Information page for the selected Client. For more information, see the Client Information section of this document.

NOTE: For more information on the Active Record, see the Active Record section of this document

Fields:
- **Authorized Representative 1:**
  - **Last Name –** The last name of the first authorized representative. This field is mandatory.
  - **First Name –** The first name of the first authorized representative. This field is mandatory.
  - **MI –** The middle initial of the first authorized representative. This field is optional.
  - **Date of Birth –** The date of birth of the first authorized representative. This field is mandatory and stored in the format of MM/DD/YYYY. The user can either select the date from the calendar wizard provided or by manually entering the date. When manually entering the date the user does not need to enter the forward slash (/) it will be automatically populated.
  - **Proof Of Identity –** The proof of identity of the first authorized representative. This field is mandatory and is selected from a drop down list. For more information, see the Proof Identities base table section of this document.

- **Authorized Representative 2:**
  - **Last Name –** The last name of the second authorized representative. This field is mandatory if data is entered into any of the authorized representative two fields. Otherwise, this field is optional.
  - **First Name –** The first name of the second authorized representative. This field is optional.

- **MI** – The middle initial of the second authorized representative. This field is optional.
- **Proof Of Identity** – The proof of identity of the second authorized representative. This field is mandatory if data is entered in any of the authorized representative two fields. Otherwise, this field is optional. It is selected from a drop down list. For more information, see the Proof Identities base table section of this document.

- **Education** – The education level of the first authorized representative. This field is mandatory and selected from a drop down list. For more information, see the Education Levels base table section of this document.

- **Register To Vote?** – The voter registration status of the first authorized representative. This field is mandatory and selected from a drop down list. For more information, see the Voter Registrations base table section of this document.

- **Disability** – The disability of the first authorized. This field is optional and selected from a drop down list. For more information, see the Disabilities base table section of this document.

- **Proof Of Address** – The proof of address of the first authorized representative. This field is mandatory and selected from a drop down list. For more information, see the Proof of Address base table section of this document.

- **Email Address** – The email address of the first authorized representative. This field is optional.

- **Do Not Email** – A checkbox to determine if the Family wishes to receive emails. If the checkbox is checked then the Family does not wish to receive any emails. If the checkbox is unchecked then the Family agrees to receive emails.

- **Do Not Send Mailings** – A checkbox to determine if the Family wishes to receive mailings to the first addresses listed. If the checkbox is checked then the Family does not wish to receive any mailings. If the checkbox is unchecked then the Family agrees to receive mailings

- **Street Address:**
  - **Street 1** – The first street address of the Family. This field is mandatory.
  - **Street 2** – The second street address of the Family. This field is optional.
  - **City, State, ZIP Code, and County** – The City, State, ZIP Code, and County combination for the first street address of the Family. This field is mandatory and selected from a drop down list. Any portion of this field (i.e. State or ZIP Code) can be manually entered. Possible field values will be available for selection within the drop down as characters are entered. For more information, see the GEO Location base table section of this document.

- **Mailing Address:**
  - **Street 1** – The first mailing address of the Family. This field is mandatory.

- **Street 2 –** The second mailing address of the Family. This field is mandatory.
- **City, State, ZIP Code, and County –** The City, State, ZIP Code, and County combination for the first mailing address of the Family. This field is mandatory and selected from a drop down list. Any portion of this field (i.e. State or ZIP Code) can be manually entered. Possible field values will be available for selection within the drop down as characters are entered. For more information, see the GEO Location base table section of this document.

- **Family Phone(s) Grid:** A grid used to display all phone numbers listed for the Family.
  - **Phone Number –** The ten digit number listed. This field is display only.
  - **Ext. –** The extension of the number listed. This field is display only.
  - **Phone Type –** The type of the number listed. This field is display only.
  - **Do Not Call –** A checkbox to determine if user is allowed to call the phone number listed. This field is display only. If the checkbox is checked then the user cannot call the Family using this number. If the checkbox is unchecked then the user is allowed to call the Family using this number.
  - **Do Not Text –** A checkbox to determine if user is allowed to text the phone number listed. This field is display only. If the checkbox is checked then the user cannot text the Family using this number. If the checkbox is unchecked then the user is allowed to text the Family using this number.
  - **Priority –** The priority of the phone number listed. This field is display only. At least one phone number must have the priority of primary.

- **Languages:**
  - **Primary Language –** The primary language of the first authorized representative. This field is mandatory, will default to English, and is selected from a drop down list.
  - **Secondary Language –** The secondary language of the first authorized representative. This field is optional and is selected from a drop down list.

  NOTE: For more information on languages, see the Languages base table section of this document.
  - **Interpreter Required –** A checkbox to determine if the Family requires an interpreter. If the checkbox is checked then an interpreter is required for the Family. If the checkbox is unchecked then the Family does not require an interpreter. The checkbox will only be enabled for selection if primary language is anything but English. This field is optional.

- **Proxy 1:**
  - **Last Name –** The last name of the first proxy for the Family. This field is mandatory if data is entered into any of the other proxy one fields. Otherwise, this field is optional.
  - **First Name –** The first name of the first proxy for the Family. This field is mandatory if data is entered into any of the other proxy one fields. Otherwise, this field is optional.
  - **MI –** The middle initial of the first proxy for the Family. This field is optional.

    - **Proof Of Identity –** The proof of identity of the first proxy for the Family. This field is mandatory if data is entered into any of the other proxy one fields. Otherwise, this field is optional. It is selected from a drop down list. For more information, see the Proof Identities base table section of this document.

- **Proxy 2:**
    - **Last Name –** The last name of the second proxy for the Family. This field is mandatory if data is entered into any of the other proxy two fields. Otherwise, this field is optional
    - **First Name –** The first name of the second proxy for the Family. This field is mandatory if data is entered into any of the other proxy two fields. Otherwise, this field is optional.
    - **MI –** The middle initial of the second proxy for the Family. This field is optional.
    - **Proof Of Identity -** The proof of identity of the second proxy for the Family. This field is mandatory if data is entered into any of the other proxy two fields. Otherwise, this field is optional. It is selected from a drop down list. For more information, see the Proof Identities base table section of this document.

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

Buttons:

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

(Add) – Click the Add button to display the add modal and add records to the Family Phones(s) grid.

Navigation Path: WIC Services tab | Client/Family Search | Add a New Family Information | Add a Phone Number

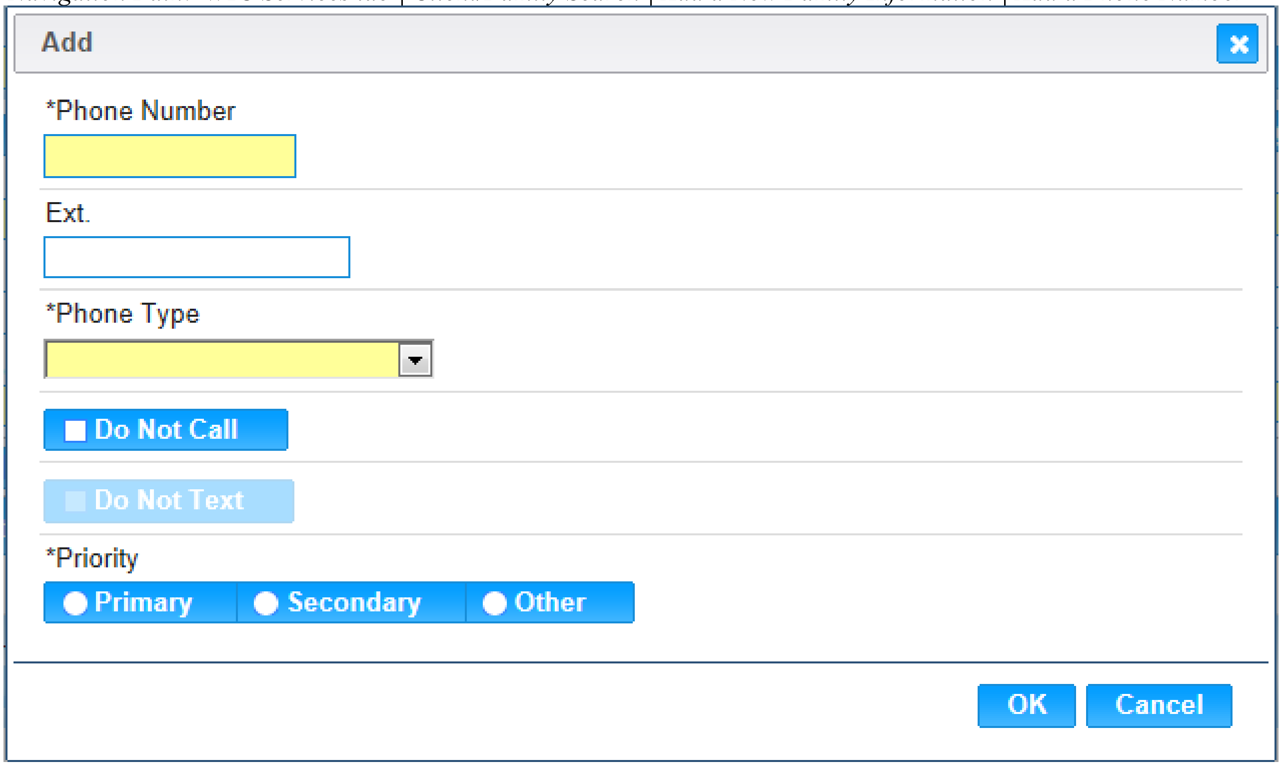


Figure 12: Add a Phone Modal

Fields (Add a Phone Modal):

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

Buttons (Add a Phone Modal):

- **OK** – Press this button to close the modal and add a new unsaved record to the grid.
- **Cancel** – Press this button to close the modal without adding a new record to the grid.
- **(Close Window)** – The modal is closed without adding a new record to the grid.
- **(Edit Icon)** – Press this button to open up the edit page to allow for desired modifications to an existing record.
- **(Delete Icon)** – Press this button to remove an existing record.
  NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Appointment Reminder Preference** – Selection options (Phone, Email, and Text) to determine the Family's appointment reminder preference. This field is optional. For more information, see the Appointment Scheduler DFDD.

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

Navigation Path: WIC Services tab | Client/Family Search | Add a New Family Information | Add a How did you hear about WIC?

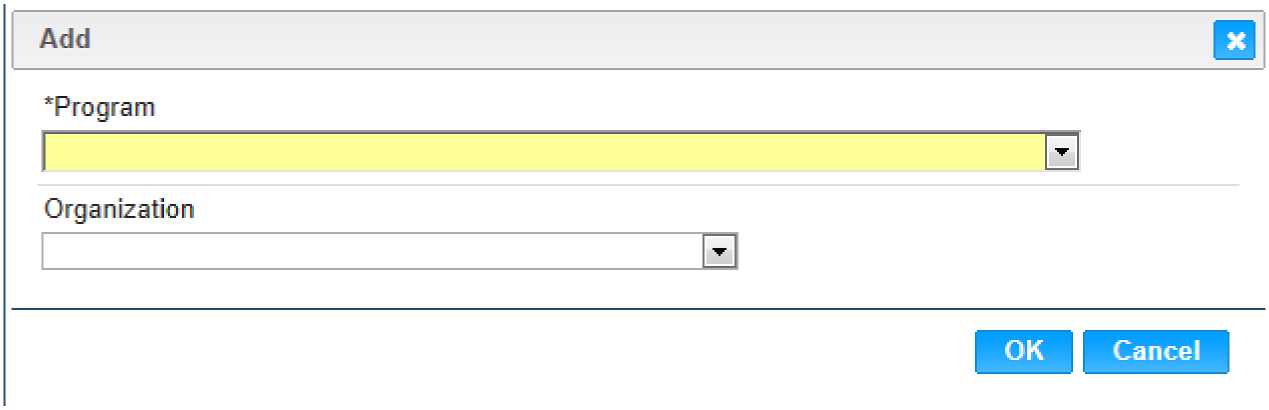


Figure 13: Add a How did you hear about WIC? Modal

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

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

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

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

    - **(Close Window) –** The modal is closed without adding a new record to the grid.

    - **(Edit Icon) –** Press this button to open up the edit page to allow for desired modifications to an existing record.

    - **(Delete Icon) –** Press this button to remove an existing record.
      NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **eWIC Card Management –** Press this button to navigate to the eWIC Card Management page.
- **Print Proxy Form –** Press this button to populate the WIC proxy form modal. For more information, see the Forms section of this document.
- **Signatures –** Press this button to navigate to the Signatures page. For more information, see the Signatures section of this document.
- **New Client –** Press this button to navigate to the Client Registration page. For more information, see the Client Registration section of this document.
- **Save –** Press this button to save changes made to the page. For more information, see background process number six.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculation(s): None

Background Processes:

1) A user may enter only one number with the priority of primary and one as secondary. As many numbers as desired may be entered that have a priority of other.
2) The phone appointment reminder preference option will be disabled if no phone number is listed or the do not call checkbox is checked for all numbers listed for the Family. The email option will be disabled if no email address is entered or the do not email checkbox is checked for the Family. The text option will be disabled if no number exists with the phone type of cell phone or the do not text checkbox is checked for the Family.
3) The majority of forms for Arizona will be in both English and Spanish. If populated while in a Client record, forms will populate in the primary language of the Family (Spanish or English only). If the primary language is something other than Spanish or English, the default language will be English. For more information, see the Forms section of this document.
4) The user is forced to select proof of identity again if any changes take place to any of authorized representative one's fields (last name, first name, or MI). The same process occurs for any of authorized representative two's fields.
5) The user is forced to update register to vote? if changes take place to any of the address fields (street 1, street 2, or the city, state, ZIP code, and county field). This is true for both the street and mailing address sections of the page. The user will also be forced to update

this field before each new certification. This involves the user navigating to the page, making any necessary changes, and then saving the page.

6) The system performs a four step save process when saving edits for a Family:
    a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
    b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
    c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
    d. Finally, after the other three steps have been completed successfully the system uses the Family's previously assigned Family ID to save all changes made to the database.

3 ADDING/UPDATING CLIENT INFORMATION, USING THE ACTIVE RECORD, AND IDENTIFYING POTENTIAL DUPLICATES

Narrative:
The purpose of these pages is to enroll new Clients into the WIC program (Client Registration page) along with maintain Client record data (Client Information page). A process is run on the save of both pages that attempts to identify potential duplicate records throughout the State Agency. If a potential duplicate is identified a modal will open and the user must say whether or not the possible identified duplicate is in fact the Clients record.

3.1 Client Registration Page (Add a New Client Page)

Narrative:
The purpose of this page is to start the process to enroll new Clients into the WIC program. The Client Registration page is used to record general information about a potential Client. This general information includes personal information such as last name, first name and date of birth along with ethnicity and racial information about a potential Client.

The Client Registration page is displayed when the New Client button is pressed on either the Family Information page or Client Information page. After all mandatory fields are filled out on the Client Registration page and the save button is pressed the new Client will be assigned a Client ID and added to the Family from which the process of creating a new Client was started.

Navigation Path: WIC Services tab | Client/Family Search | Family Information | New Client

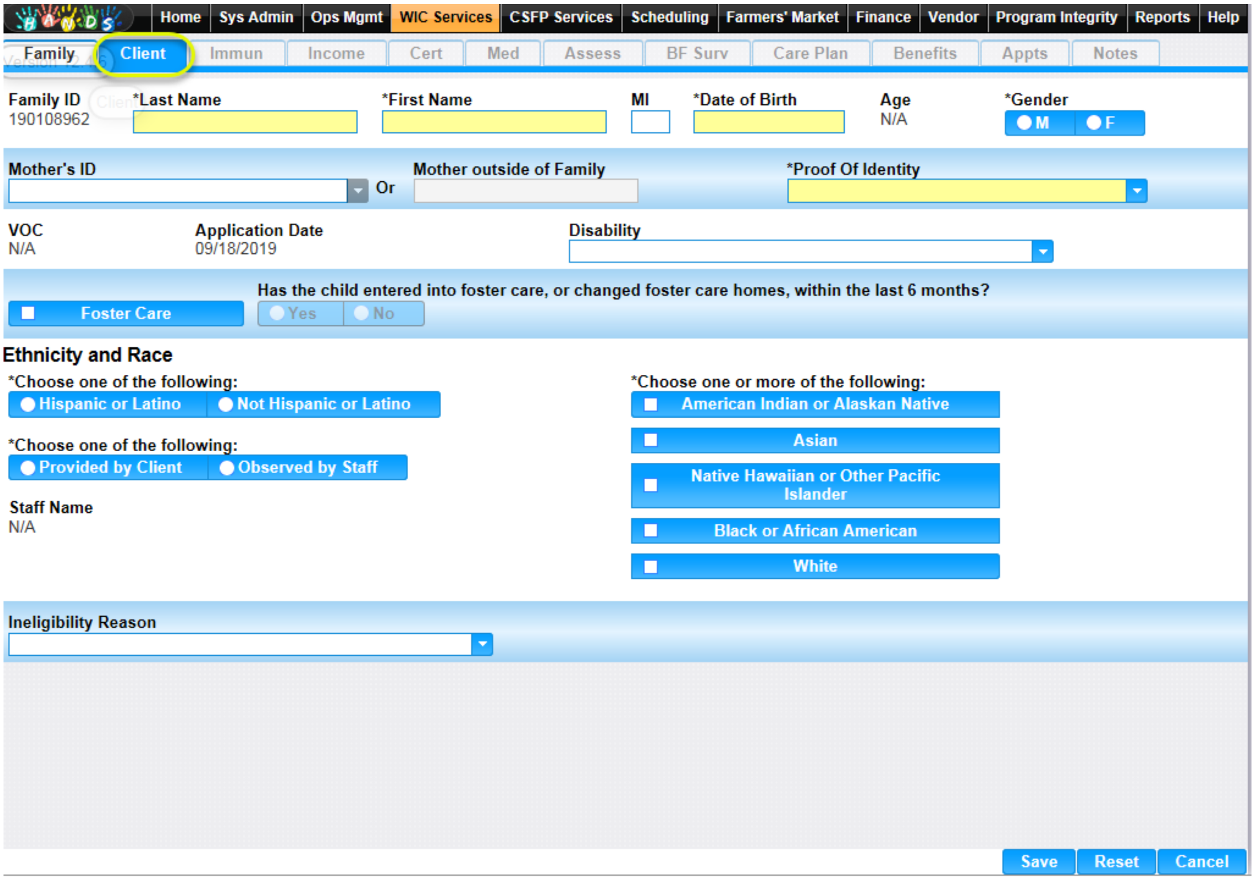


Figure 14: Client Registration page

Fields:

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

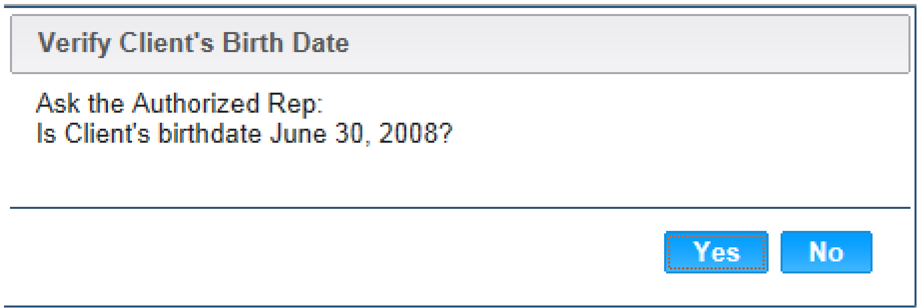


Figure 15: Verification of Client's Birth Date Modal

- **Age –** The calculated age of the Client. This field is display only and populates based on the date of birth entered. The format of the field is years followed by months. For more information, see calculation number one.
- **Mother ID –** The Client ID of the mother's record within the same Family ID as the Client. This field is optional and selected from a drop down list. This field will be disabled for Clients over the age of six. For more information, see background process number two.
- **Mother outside of Family –** The Client ID of the mother's record outside of the Family ID of the Client. This field is optional. For more information, see background process number three.
- **Proof of Identity –** The proof of identity of the Client. This field is mandatory and is selected from a drop down list. For more information, see the Proof Identities base table section of this document.
- **VOC –** The verification of certification for an out of state transfer Client. This field is display only. If the Client does not have a verification of certification, then the VOC field will populate with N/A. For more information, see the Out of State Transfer section of this document.
- **Application Date –** The date in which the Client Registration process was started. This field is display only and populates in the format of MM/DD/YYYY.
- **Disability –** The disability of the Client. This field is optional and selected from a drop down list. For more information, see the Disabilities base table section of this document.
- **Foster Care:** Fields to determine the foster care status of the Client if any.
  - **Foster Care** – A checkbox to determine if the Client is a foster child or not. If the checkbox is checked then the Client is considered a foster child. If the checkbox is unchecked then the Client is considered not a foster child. This field is optional.
  - **Has the child entered into foster care, or changed foster care homes, within the last 6 months? –** Selection options (Yes and No) to determine the answer to the question for the Client. This field is disabled if the foster care checkbox is not checked. This field is mandatory if the foster care checkbox is checked. If Yes is selected then WIC Code 903 (Foster Care) is assigned to the Client. If No is selected then WIC Code 903 (Foster Care) is not assigned to the Client. For more information on WIC Code calculations, see the Assessment section of this document.
- **Ineligibility Reason –** The ineligibility reason of the Client. This field is optional and selected from a drop down list. For more information, see the Termination section of this document. The ineligibility reason field will be disabled once the Client has a complete

assessment and becomes active. For more information, see the Care Plan section in the Nutrition Education DFDD.

Buttons:

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

- **Ethnicity and Race***:*
    - **Ethnicity –** Selection options (Hispanic or Latino and Not Hispanic or Latino) to determine the ethnicity of the Client. This field is mandatory.
    - **Race –** Checkboxes to determine the race of the Client. It is mandatory that at least one of the checkboxes is selected. The options are: American Indian or Alaskan Native, Asian, Native Hawaiian or Other Pacific Islander, Black or African American, and White.
    - **Origins –** The origins field is used to determine the origin of the Client. This field is optional and selected from a drop down list. One, multiple, or all of the options in the drop down list can be selected. The State Agency has the ability to turn this field on and off. For more information, see the State Application Settings section of the System Administration DFDD.
    - **Provided/Observed –** Selection options (Provided by Client and Observed by Staff) to determine how the Ethnicity and Race information was obtained. This field is mandatory. Selecting the option of Observed by Staff will populate the staff name field with the logged in username.
    - **Staff Name –** The staff name field displays the logged in username. This field is display only. The staff name field will only be populated with the logged in username if the Observed by Staff option is selected. If the Provided by Client option is selected then the staff name field will display N/A.

- **Save –** Press this button to save changes made to the page. For more information, see background process number four.

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

- **Cancel –** Press this button to close the Client Registration page and return the user either the Family Information page or the Client Information page depending on which page the New Client button was pressed on. For more information on the New Client button, see the Family Information and Client Information sections of this document.

Calculations:

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

Background Processes:

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

Figure 16: Males older than 5 error message

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

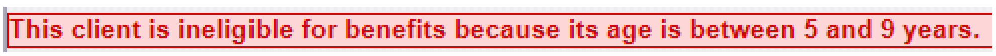


Figure 17: Females older than 5 error message

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

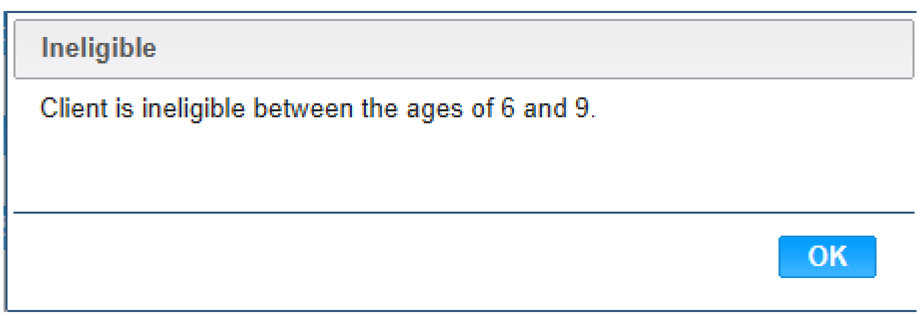


Figure 18: Ineligible between the ages of 6 and 9 Modal

    d. Female Clients who have an age in years greater than nine can be registered in WIC and successfully saved.
2) Only Client IDs for mothers (females over the age of nine) who are within the Family ID will be populated in the Mother ID drop down list. This allows for the Client to be linked to a mother within the Client's Family.
3) The Mother outside of Family field allows the entry of any mother's (females over the age of nine) Client ID throughout the system. This allows for the Client to be linked to a mother outside of the Client's Family.
4) The system performs a six step save process when saving a new Client:

a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
d. Fourth, it ensures that the Client is eligible to be saved base on the Clients date of birth. For more information, see background process number one.
e. Fifth, it checks to see if the Client is a possible dual enrollment. For more information, see the Dual Enrollment section of this document.
f. Finally, after the other five steps have been completed successfully the system assigns a unique system generated Client ID to the Client and adds the Client data to the database. The Client ID format is CLLA9999999. The first two digits (CL) is the organizational code of the Clinic that the Client is being created in. The second two digits (LA) is the organizational code of the Local Agency that the Client is being created in. For more information on organizational codes, see the Organizational Units section of the Operations Management DFDD. The remaining seven digits are a unique system generated sequence that is incremented by one after each new Client creation. After the save process has been completed and the new Client has been assigned a Client ID, the Client will be within the Family record from which the process of creating a new Client was started. The user will be displayed on the new Clients, Client Information page. For more information, see the Client Information section of this document.

3.2 Client Information Page (Edit a Client Page)

Narrative:

The purpose of this page is to maintain general information about a Client. This general information includes personal information such as last name, first name, and date of birth along with ethnicity and racial information about a Client in the State Agency.

The Client Information page is displayed after the successful save of a new Client through the Client Registration process or by searching for a Client using the Client/Family Search page and clicking on the Client's Client ID. After all desired data has been updated the save button can be pressed and the user can continue working with the Client's record.

Navigation Path: WIC Services tab | Client/Family Search | Family Information | New Client

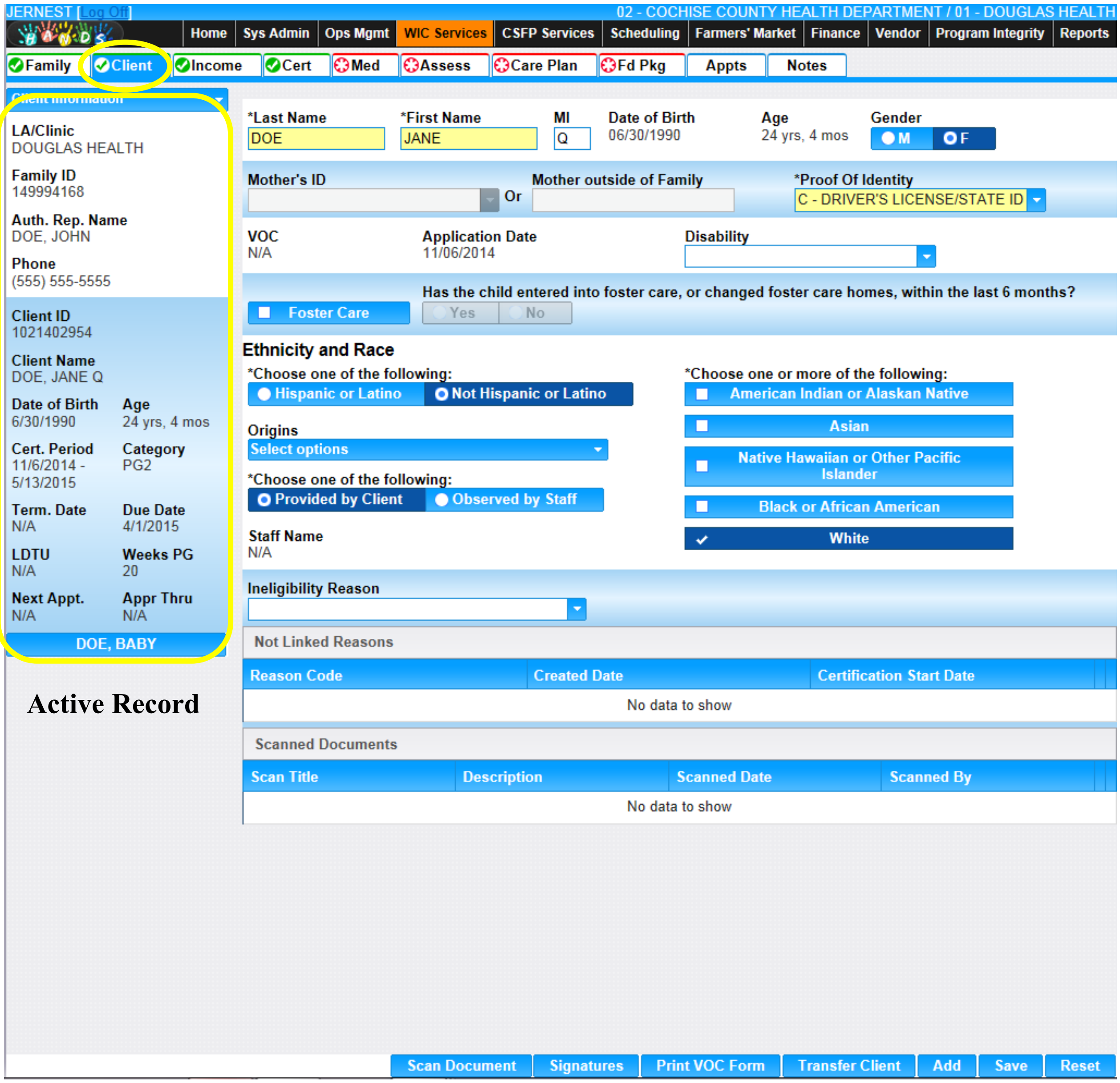


Figure 19: Client Information page

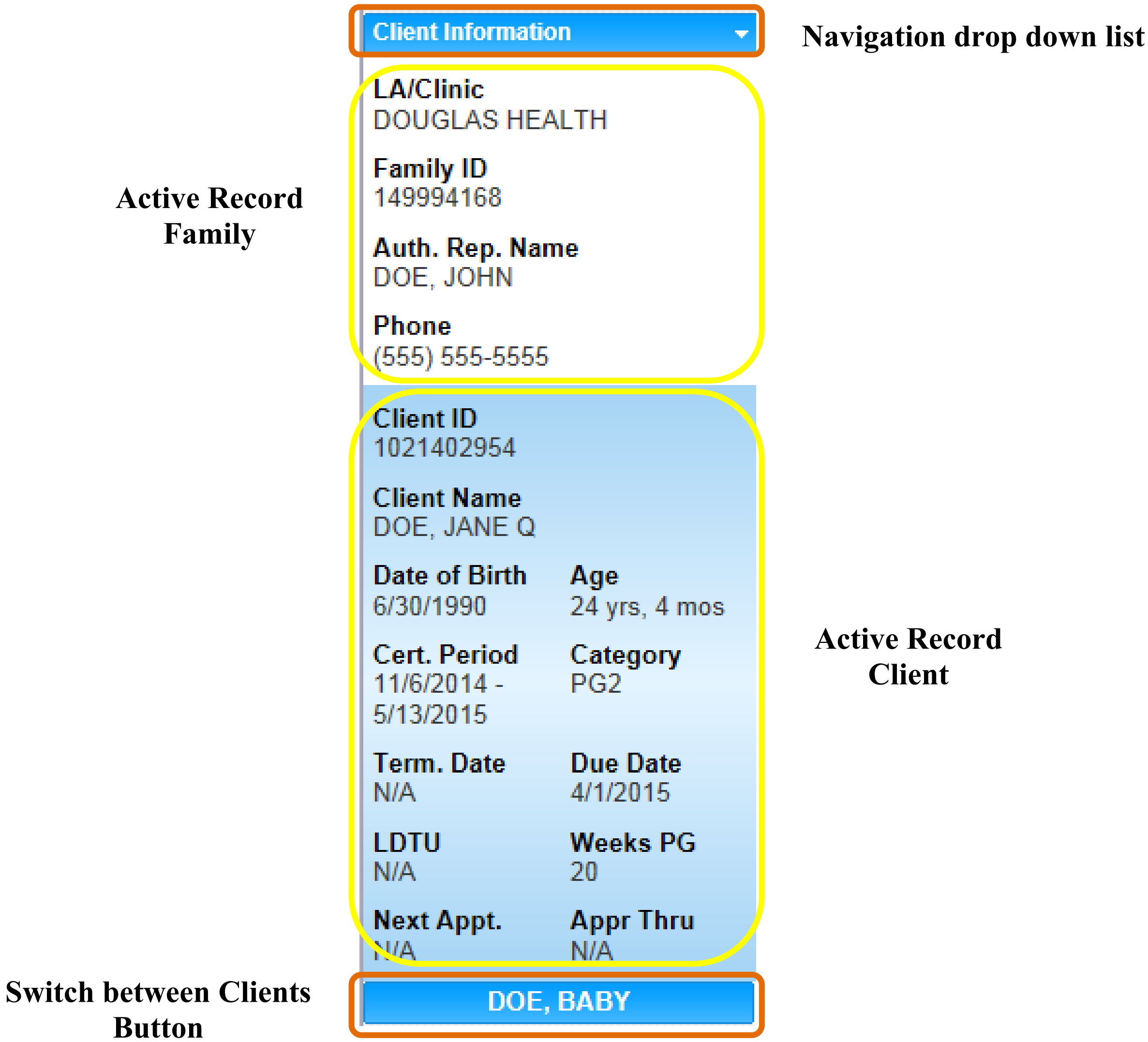


Figure 20: Active Record

Fields (Active Record Family):

- **Navigation drop down list –** A drop down list that displays the page the user is on. This drop down list can be used as another means of navigation throughout the system. For more information, see both the Active Record section of this document and the Navigation drop down list section of the General Requirements DFDD.
- **LA/Clinic –** The organizational unit that serves as the Clinic that the Family is registered in. This field is display only.
- **Family ID –** The unique, system generated identification number for the Family that was assigned on creation. This field is display only.
- **Auth. Rep. Name –** The last name, first name, and middle initial of the first authorized representative. This field is display only.
- **Phone –** The primary phone number for the Family. If no phone exists then N/A will be displayed. This field is display only.

Fields (Active Record Client):

- **Client ID –** The unique, system generated identification number for the Client that was assigned on creation. This field is display only.
- **Client Name –** The last name, first name, and middle initial of the Client. This field is display only.
- **Date of Birth –** The date of birth of the Client. This field is display only. The format of this field is MM/DD/YYYY.
- **Age -** The calculated age of the Client. This field is display only and populates based on the date of birth entered. The format of the field is years followed by months. For more information, see calculation number one.
- **Cert. Period –** The certification period for the Client. If no certification exists then this field will display N/A. This field is display only.
- **Category –** The category of the Client's certification record. If no certification exists then this field will display N/A. This field is display only.
  NOTE: For more information on Certifications, see the Certification Action section of this document.
- **Term. Date –** The date in which the Clients most recent certification record was terminated. If no termination date exists this field will display N/A. This field is display only. For more information, see the Termination section of this document.
- **Due Date –** The expected delivery date for a pregnant Client. If the Client is not either category PG1 or PG2 this field will display N/A. This field is display only. For more information, see the Certification Action section of this document.
- **LDTU –** The last date to use on the latest checks issued to the Client. If the Client does not have a LDTU then this field will display N/A. This field is display only. For more information, see the Food Benefit Issuance section of the Food Package LA DFDD.
- **Weeks PG –** The number of weeks pregnant for the Client. If the Client is not either category PG1 or PG2 this field will display N/A. This field is display only. For more information, see the Certification Action section of this document.
- **Next Appt. –** The latest scheduled appointment for the Client. If the Client does not have any scheduled appointments this field will display N/A. This field is display only. For more information, see the Appointment Scheduler DFDD.
- **Appr Thru –** The latest approval date entered for the Client. If the Client does not have an approval date entered this field will display N/A. This field is display only. For more information, see the Food Package Assignment section of the Food Package LA DFDD.

Buttons (Active Record):

- **Switch between Clients –** Press this button to navigate to the Client Information page for the selected Client.

NOTE: For more information on the Active Record, see the Active Record section of this document.

Fields:

- **Last Name –** The last name of the Client. This field is mandatory.
- **First Name –** The first name of the Client. This field is mandatory.
- **MI –** The middle initial of the Client. This field is optional.

- **Date of Birth –** The date of birth of the Client. This field is mandatory and stored in the format of MM/DD/YYYY. The user can either select the date from the calendar wizard provided or by manually entering the date. When manually entering the date the user does not need to enter the forward slash (/) it will be automatically populated. After the user enters a date of birth, a verification modal will open to verify that the date of birth entered for the Client is correct. Pressing the Yes button will close the modal and allow the user to proceed with the Client Registration page. Pressing the No button will close the modal, clear the data entered in the date of birth field, and the user will be able to enter the correct date of birth which will start the process all over again. For more information, see background process number one. The date of birth fields becomes disabled after a certification record has been saved for the Client on the Certification Action page.

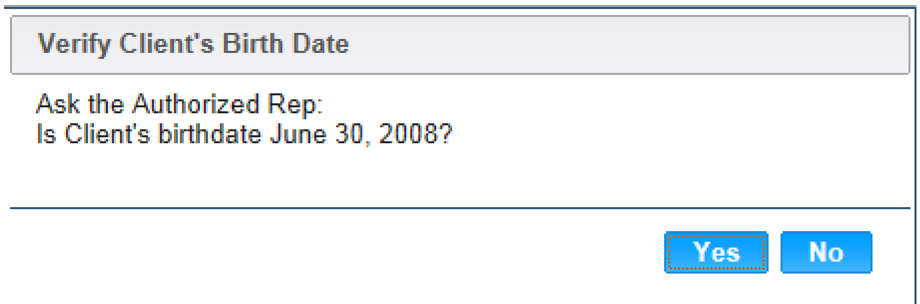


Figure 21: Verification of Client's Birth Date Modal

- **Age –** The calculated age of the Client. This field is display only and populates based on the date of birth entered. The format of the field is years followed by months. For more information, see calculation number one.
- **Mother ID –** The Client ID of the mother's record within the same Family ID as the Client. This field is optional and selected from a drop down list. This field will be disabled for Clients over the age of six. For more information, see background process number two.
- **Mother outside of Family –** The Client ID of the mother's record outside of the Family ID of the Client. This field is optional. For more information, see background process number three.
- **Proof of Identity –** The proof of identity of the Client. This field is mandatory and is selected from a drop down list. For more information, see the Proof Identities base table section of this document.
- **VOC –** The verification of certification for an out of state transfer Client. This field is display only. If the Client does not have a verification of certification then the VOC field will populate with N/A. For more information, see the Out of State Transfer section of this document.
- **Application Date –** The date in which the Client Registration process was started. This field is display only and populates in the format of MM/DD/YYYY.
- **Disability –** The disability of the Client. This field is optional and selected from a drop down list. For more information, see the Disabilities base table section of this document.
- **Foster Care:** Fields to determine the foster care status of the Client if any.

  - **Foster Care** – A checkbox to determine if the Client is a foster child or not. If the checkbox is checked then the Client is considered a foster child. If the checkbox is unchecked then the Client is considered not a foster child. This field is optional.
  - **Has the child entered into foster care, or changed foster care homes, within the last 6 months? –** Selection options (Yes and No) to determine the answer to the question for the Client. This field is disabled if the foster care checkbox is not checked. This field is mandatory if the foster care checkbox is checked. If Yes is selected then WIC Code 903 (Foster Care) is assigned to the Client. If No is selected then WIC Code 903 (Foster Care) is not assigned to the Client. For more information on WIC Code calculations, see the Assessment section of this document.
- **Ineligibility Reason –** The ineligibility reason of the Client. This field is optional and selected from a drop down list. For more information, see the Termination section of this document. The ineligibility reason field will be disabled once the Client has a complete assessment and becomes active. For more information, see the Care Plan section in the Nutrition Education DFDD.
- **Not Linked Reasons Grid:** Displays records based on data entry from the Certification action page. For more information, see the Certification Action section of this document.
  - **Reason Code –** The code and description of the reason why the Client is not linked to either a mother or child. This field is display only. For more information, see the Not Linked Reasons base table section of this document.
  - **Created Date –** The date that a Reason Not Linked was saved for the Clients certification record. This field is display only.
  - **Certification Start Date –** The certification start date for the certification record in which the reason not linked is populated for. This field is display only.
- **Scanned Documents Grid:** Displays all documents that have been scanned on the Client Information page. For more information, see the Scanner section of this document.
  - **Scan Title –** The title of the scan. This field is display only.
  - **Description –** The description of the scan. This field is display only.
  - **Scanned Date –** The date when the scan was completed. This field is display only.
  - **Scanned By –** The logged in username of the person who saved the scan. This field is display only.

Buttons:

- **Gender** - Selection options (M and F) to determine the gender of the Client. This field is mandatory.
- **Ethnicity and Race***:*
  - **Ethnicity –** Selection options (Hispanic or Latino and Not Hispanic or Latino) to determine the ethnicity of the Client. This field is mandatory.
  - **Race –** Checkboxes to determine the race of the Client. It is mandatory that at least one of the checkboxes is selected. The options are: American Indian or Alaskan Native, Asian, Native Hawaiian or Other Pacific Islander, Black or African American, and White.
  - **Origins –** The origins field is used to determine the origin of the Client. This field is optional and selected from a drop down list. One, multiple, or all of the options in the drop down list can be selected. The State Agency has the ability to turn this

field on and off. For more information, see the State Application Settings section of the System Administration DFDD.
    - **Provided/Observed –** Selection options (Provided by Client and Observed by Staff) to determine how the Ethnicity and Race information was obtained. This field is mandatory. Selecting the option of Observed by Staff will populate the staff name field with the logged in username.
    - **Staff Name –** The staff name field displays the logged in username. This field is display only. The staff name field will only be populated with the logged in username if the Observed by Staff option is selected. If the Provided by Client option is selected then the staff name field will display N/A.
- **Scan Document –** Press this button to navigate the user to the Scan Document page. For more information, see the Scanner section of this document.
- **Signatures –** Press this button to navigate the user to the Signatures page. For more information, see the Signatures section of this document.
- **Print VOC Form –** Press this button to populate the verification of certification form. For more information, see the Form section of this document.
- **Transfer Client –** Press this button to begin the Client transfer process. For more information, see the Transfer section of this document.
- **Add –** Press this button to add a new Client to the Family. Pressing this button will navigate to the user to the Client Registration page. For more information, see the Client Registration section of this document.
- **Save –** Press this button to save changes made to the page. For more information, see background process number four.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

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

Background Processes:

1) Date of Birth:

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

Males older than 5 cannot be registered in WIC.

Figure 22: Males older than 5 error message

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

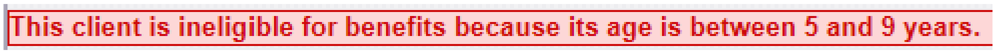


Figure 23: Females older than 5 error message

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

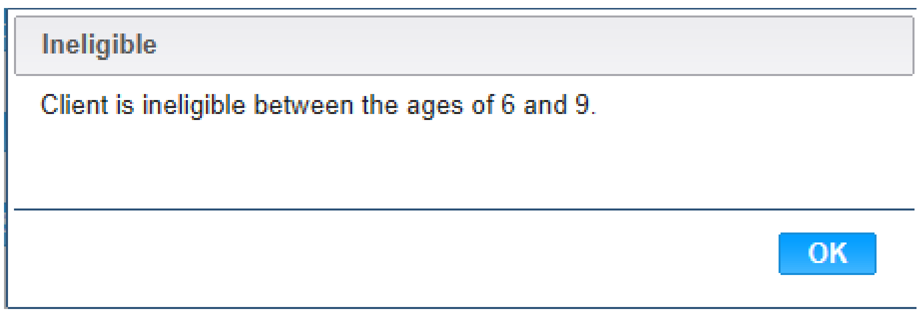


Figure 24: Ineligible between the ages of 6 and 9 Modal

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

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

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

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

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

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

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

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

e. Fifth, it checks to see if the Client is a possible dual enrollment. For more information, see the Dual Enrollment section of this document.

f. Finally, after the other five steps have been completed successfully the system uses the Client's previously assigned Client ID to save all changes made to the database.

NOTE: If either the mother ID field or mother outside of Family field are not filled in for a Client under the age of one a warning message will appear at the top of the page asking the user to fill in one of the two fields with the mom's Client ID if she is a WIC participant.

Record saved successfully. If the infant's mother is a WIC participant, please fill in the mother's ID field, and press the save button again

5) The user is forced to update the proof of identity field for the Client before each new certification. This involves the user going to the Client Information page, performing any necessary changes, and saving the page.

3.3 WIC Services Active Record

Narrative:
The purpose of this section of the page is to provide useful information to the user about a particular Client and/or Family at a glance. The active record will appear on the left side of every page when within a Client and/or Family's record. When the user is on the Family Information page only the Family section of the active record will be displayed. On every other page when within a record both the Family and Client sections will be displayed. This allows the user to see information about both the Family and Client that is being worked with at the same time.

The use of the active record allows the user to quickly jump back and forth between different Clients within a Family. This helps cut down on Client processing time and allows users to work with more Clients.

Navigation Path: WIC Services tab | Client/Family Search | Family or Client Information Page

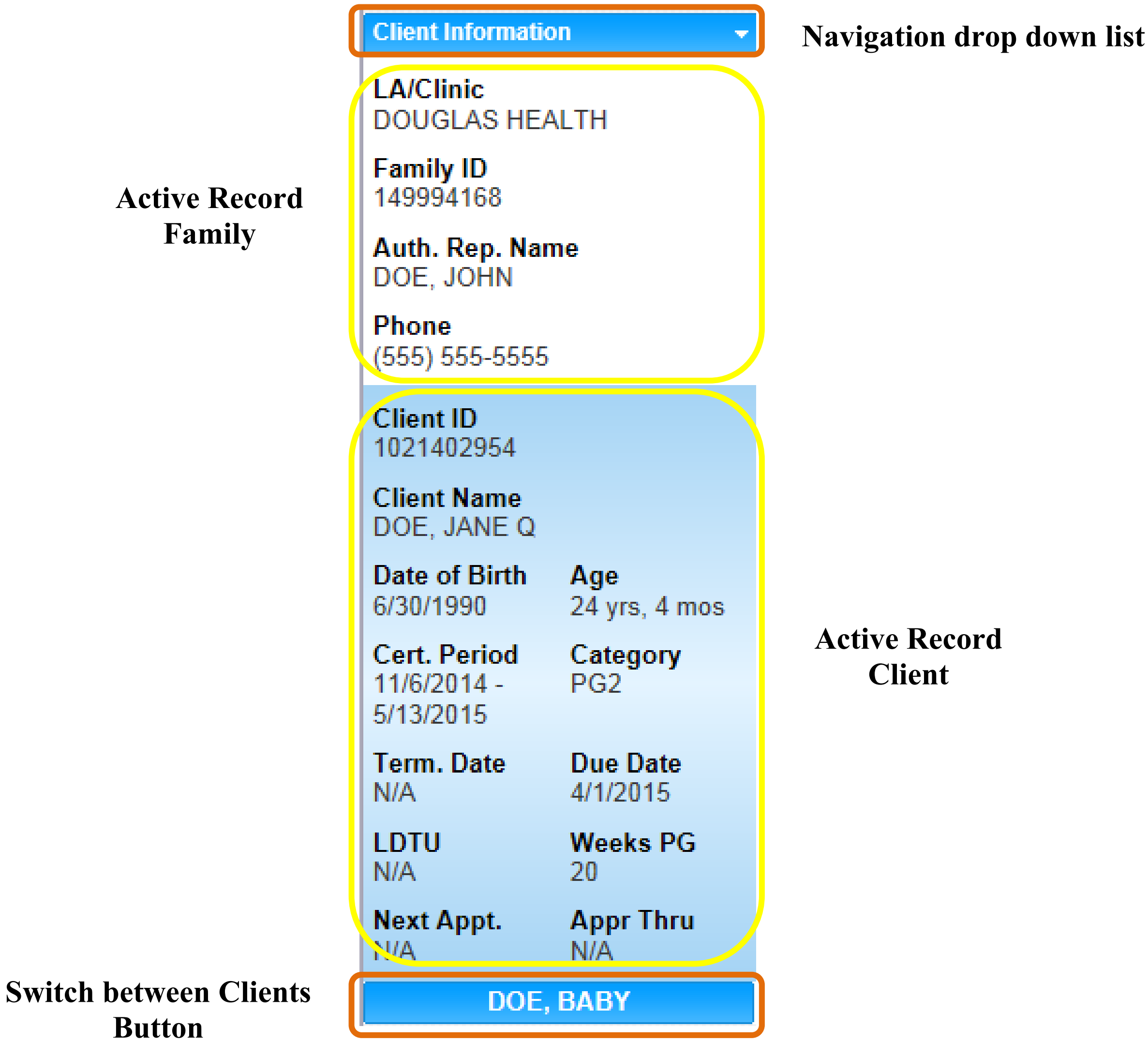


Figure 25: WIC Services Active Record

Fields (Active Record Family):

- **Navigation drop down list –** A drop down list that displays the page the user is on. This drop down list can be used as another means of navigation throughout the system. Every page within the WIC Services module can be accessed through the use of the navigation drop down list. However, the user will have different options in the drop down list when outside of a Client's record then when the user is within the context of a Client's record. For more information, see the Navigation drop down list section of the General Requirements DFDD.
- **LA/Clinic –** The organizational unit that serves as the Clinic that the Family is registered in. This field is display only.
- **Family ID –** The unique, system generated identification number for the Family that was assigned on creation. This field is display only.
- **Auth. Rep. Name –** The last name, first name, and middle initial of the first authorized representative. This field is display only.

- **Phone –** The primary phone number for the Family. If no phone exists then N/A will be displayed. This field is display only.

NOTE: On the Family Information page only the Active Record Family and Switch between Clients button are displayed in the active record area of the page.

Fields (Active Record Client):

- **Client ID –** The unique, system generated identification number for the Client that was assigned on creation. This field is display only.
- **Client Name –** The last name, first name, and middle initial of the Client. This field is display only.
- **Date of Birth –** The date of birth of the Client. This field is display only. The format of this field is MM/DD/YYYY.
- **Age -** The calculated age of the Client. This field is display only and populates based on the date of birth entered. The format of the field is years followed by months.
- **Cert. Period –** The certification period for the Client. If no certification exists then this field will display N/A. This field is display only.
- **Category –** The category of the Client's certification record. If no certification exists then this field will display N/A. This field is display only.
  NOTE: For more information on Certifications, see the Certification Action section of this document.
- **Term. Date –** The date in which the Clients most recent certification record was terminated. If no termination date exists this field will display N/A. This field is display only. For more information, see the Termination section of this document.
- **Due Date –** The expected delivery date for a pregnant Client. If the Client is not either category PG1 or PG2 this field will display N/A. This field is display only. For more information, see the Certification Action section of this document.
- **LDTU –** The last date to use on the latest checks issued to the Client. If the Client does not have a LDTU then this field will display N/A. This field is display only. For more information, see the Food Benefit Issuance section of the Food Package LA DFDD.
- **Weeks PG –** The number of weeks pregnant for the Client. If the Client is not either category PG1 or PG2 this field will display N/A. This field is display only. For more information, see the Certification Action section of this document.
- **Next Appt. –** The latest scheduled appointment for the Client. If the Client does not have any scheduled appointments this field will display N/A. This field is display only. For more information, see the Appointment Scheduler DFDD.
- **Appr Thru –** The latest approval date entered for the Client. If the Client does not have an approval date entered this field will display N/A. This field is display only. For more information, see the Food Package Assignment section of the Food Package LA DFDD.

Buttons (Active Record):

- **Switch between Clients –** Press this button to navigate to the Client Information page for the selected Client. All Clients within the Family will have their own button and display in alphabetical order. When the user is on the Client Information page for a Client within the Family, that Client will not have a Switch between Clients button in the active record area of the page. If the user hovers over one of the Switch between Client buttons with the mouse a Client Details Modal will open and display additional information about the Client.

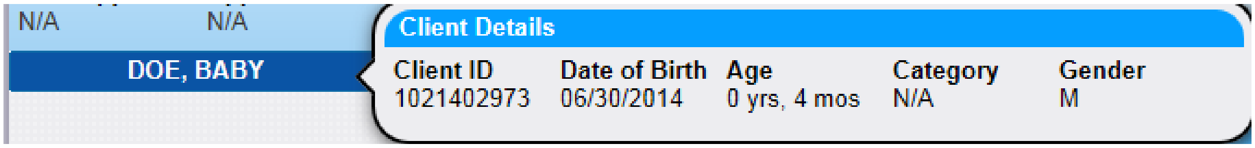


Figure 26: Client Details Modal

Fields (Client Details Modal):

- **Client ID –** The unique, system generated identification number for the Client that was assigned on creation. This field is display only
- **Date of Birth –** The date of birth of the Client. This field is display only. The format of this field is MM/DD/YYYY.
- **Age –** The calculated age of the Client. This field is display only and populates based on the date of birth entered. The format of the field is years followed by months.
- **Category – Category –** The category of the Client's certification record. If no certification exists then this field will display N/A. This field is display only.
  NOTE: For more information on Certifications, see the Certification Action section of this document.
- **Gender –** The gender of the Client. This field is display only.

Icons:

NOTE: All icons will appear on the Clients active record next to the Client ID field.

- **Breast Pump –** An icon that indicates to the user that the Client being reviewed has been issued a hospital grade breast pump. Hovering over the icon with the mouse will bring up a modal that displays the due date for the breast pump. For more information, see the Breastfeeding DFDD.

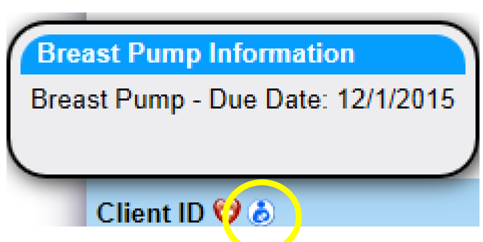


Figure 27: Breast Pump Icon

- **Disability –** An icon that indicates to the user that the Client being reviewed has a disability. Hovering over the icon with the mouse will bring up a modal that displays the disability that the Client has. Disability for a Client is selected and saved on the Client Information page.

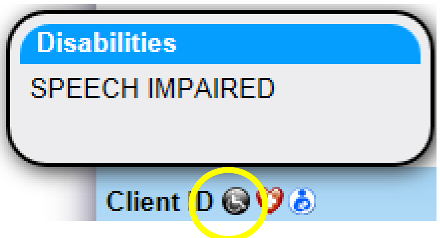


Figure 28: Disability Icon

- **Forgot Documentation –** An icon that indicates to the user that the Client being reviewed is missing one or more required forms of documentation. Hovering over the icon with the mouse will bring up a modal that displays the forms of documentation that the Client is missing. The required forms of documentation are Client Proof of Identity, Proof of Address, and Proof of Income. If the Client has the Forgot Documentation option saved for any of these fields the icon will display on the active record. For more information on Forgot Documentation and the limitation of benefit issuance related to it, see the Food Package LA DFDD. The Forgot Documentation active record icon will remain at the family level for Proof of Address and will display for all clients, even if it applies to only one client.

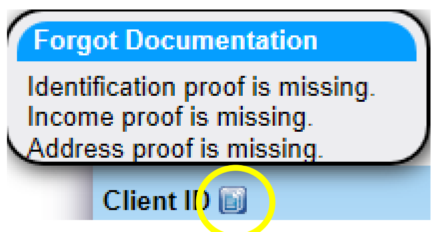


Figure 29: Forgot Documentation Icon

- **High Risk –** An icon that indicates to the user that the Client being reviewed is high risk. Hovering over the icon with the mouse will bring up a modal that displays additional information. A Client is considered High Risk based on the WIC Codes assigned to them. For more information on WIC Codes, see the Assessment section of this document. The red icon is displayed for a Client who has not yet seen a nutritionist. The green icon is displayed for a Client who has seen a nutritionist. The nutritionist will manually click the heart icon and save the Care Plan page in order for it to display green on the active record. For more information on the Care Plan, see the Care Plan section of the Nutrition Education DFDD.

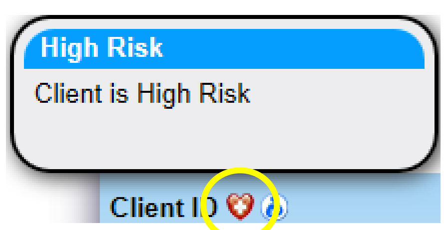


Figure 30: Red High Risk Icon

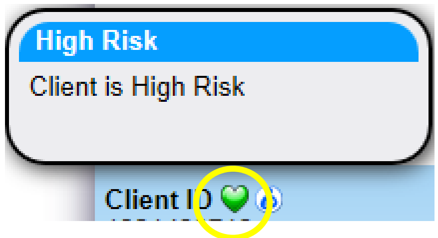


Figure 31: Green High Risk Icon

- **Mid-Cert Health Check –** An icon that indicates to the user that the Client being reviewed is in need of a mid-cert health check. Hovering over the icon with the mouse will bring up a modal that displays additional information. A mid-cert health check consists of the user updating the Client's medical record. For more information, see the Medical section of this document.

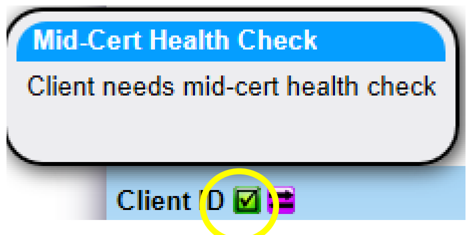


Figure 32: Mid-Cert Health Check Icon

- **Missing Medical –** An icon that indicates to the user that the Client being reviewed had a pending lab code used for their medical record at the last visit and the Client's medical data needs to be updated. The Client could be missing either anthropometric or blood work data. Hovering over the icon with the mouse will bring up a modal that displays additional information. For more information on, see the Medical section of this document.

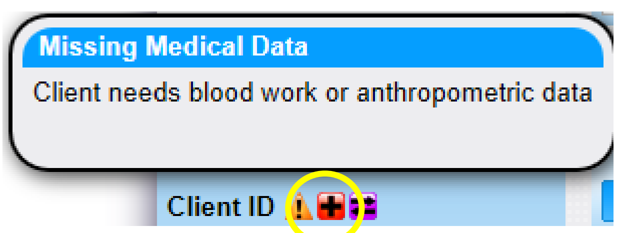


Figure 33: Missing Medical Icon

- **Out of State Transfer –** An icon that indicates to the user that the Client being reviewed is an out of state transfer Client. Hovering over the icon with the mouse will bring up a modal that displays the verification of certification ID saved for the Client. For more information, see the out of state transfer section of this document.

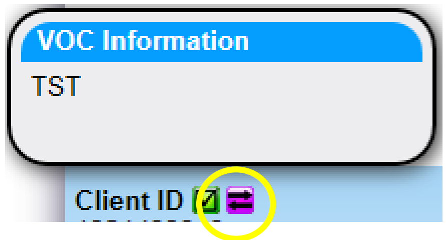


Figure 34: Out of State Transfer Icon

- **Staff Alert –** An icon that indicates to the user that the Client being reviewed has a note that has been saved as a Staff Alert. Hovering over the icon with the mouse will bring up a modal that displays additional information. If the user clicks on the icon, the page will refresh and the Notes page will be presented. For more information on Notes, see the Nutrition Education DFDD.

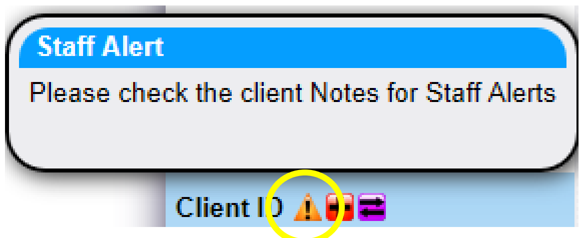


Figure 35: Staff Alert Icon

Calculations: None

Background Processes: None

3.4 Potential Duplicate Client

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

Navigation Path: WIC Services tab | Client/Family Search | Add a New Client | Potential Duplicate Client Record

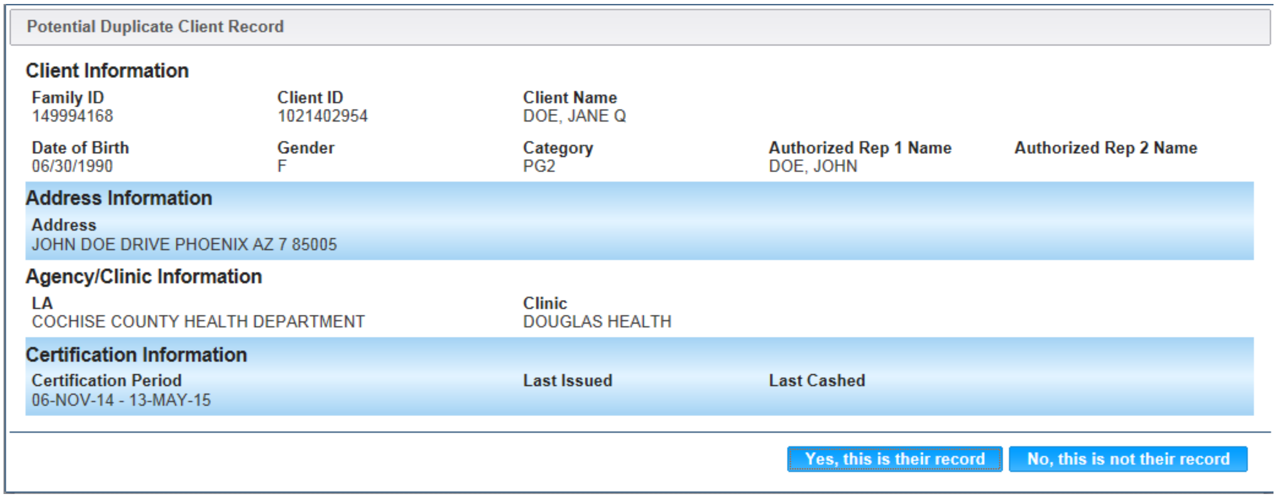


Figure 36: Potential Duplicate Client Record Modal

Fields:

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

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

- **Agency/Clinic Information:**
  - **LA –** The Local Agency of the potential duplicate Client. This field is display only. The potential duplicate record process will attempt to identify potential matches throughout the users State Agency.
  - **Clinic –** The Clinic of the potential duplicate Client. This field is display only. The potential duplicate record process will attempt to identify potential matches throughout the users State Agency.
- **Certification Information:**
  - **Certification Period –** The certification start and end date for the potential duplicate Client. This field is display only and will display blank if no certification exists.
  - **Last Issued –** The last date to use of the last checked that was issued to the potential duplicate Client. This field is display only and will display blank if no checks have been issued.
  - **Last Cashed –** The date of the last check that was cashed for the potential duplicate Client. This field is display only and will display blank if no checks have been cashed.

Buttons:

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

Calculations: None

Background Processes:

1) The identifying factors to determine if a Client is a potential match of another one within the State are: the first eight letters of the last name of the Client, first six letters of the first name of the Client, the birth month of the Client, the birth year of the Client, the gender of the Client, and the middle initial of the Client.
2) When the “Yes, this is their record” option is selected, then one of two scenarios will apply.
   a. If the Client record resides in the Clinic the Client is enrolling in, then Client record will return to the original record and automatically navigate the user to the Family Information screen. The user will update the necessary demographic information for the Family and then proceed with updating necessary Client information. The record that was being created is discarded.
   b. If the Client record resides in another Clinic within the Client’s Local Agency or in another Local Agency within the State, then the system will automatically navigate the user to the in-state transfer process where the user will be able to transfer the Family or Client into their Clinic. For more information, see the In-State Transfer section of this document. If upon the transfer, of the original Client record into the current LA/Clinic, the Client had received benefits within the same

month as trying to be certified again, the system will prevent the user from receiving multiple benefits within the same month. An error message will display on the Issuance page to inform the user that the Client has already received benefits.

3) If the “No, this is not their record” option is selected, then the user will proceed with the current record and the saving of the new Client will occur successfully. The Client’s record will be flagged as a potential duplicate and the records will be linked together and appear on the resolve dual enrollment screen. For more information, see the Resolve Dual Enrollment screen in the Program Integrity – Clinic DFDD.

4 INCOME PAGE

Narrative:

The purpose of this page is to add and maintain income records for a Family based on all of the Client's income records within the Family. The user can add income records and manually assign them to different combinations of Clients within the Family. The system will notify the user if the combination of income records entered for a Client exceeds the allowable income level range for the Client's Family size as defined in the income levels base table. It is possible for some Client's to be ineligible and some to be eligible within the same Family. For more information, see the Income Levels base table section of this document.

4.1 Add a New Income Page

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Income Tab | Add a New Income

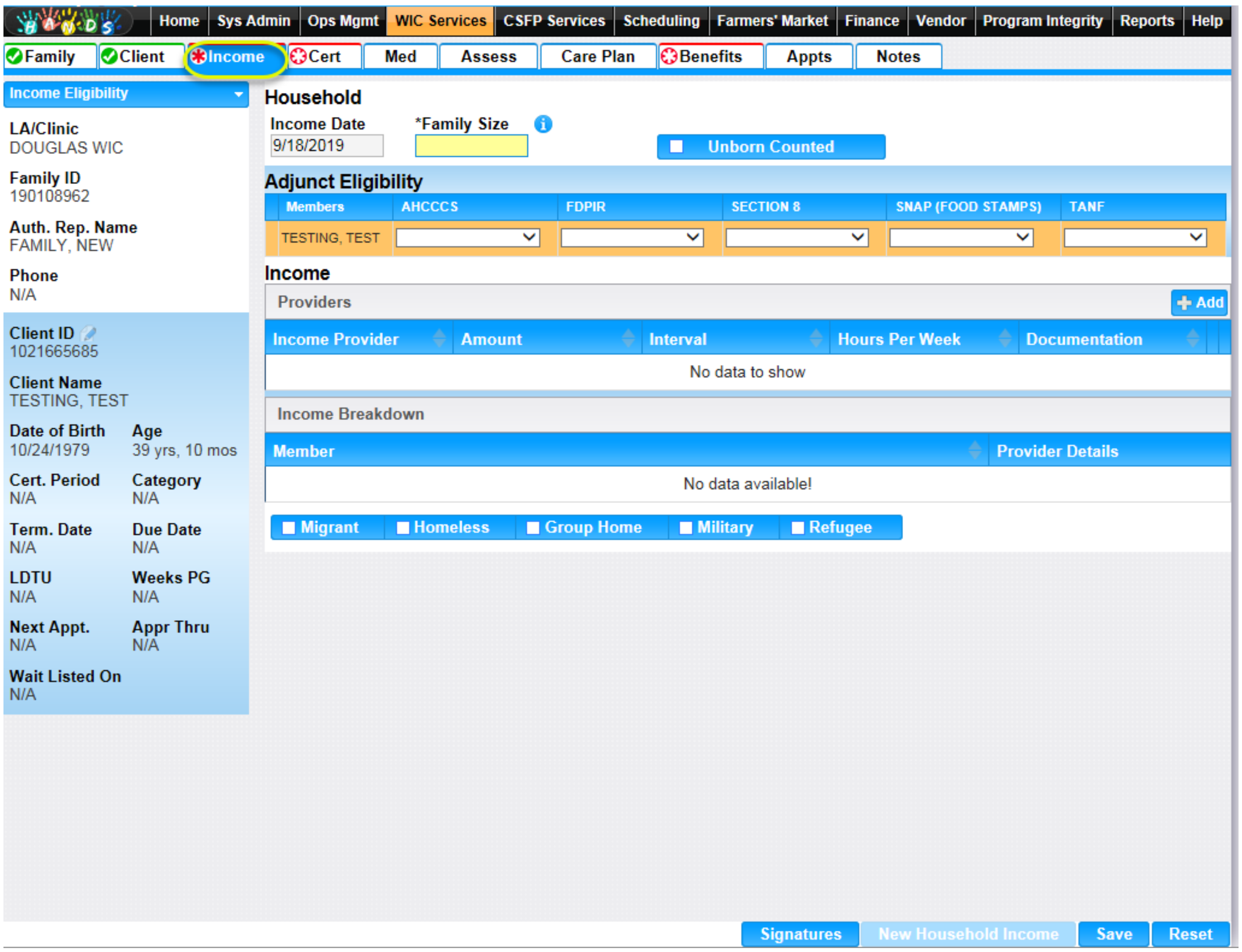


Figure 37: Add a New Income Page

Fields:

- **Income Date –** The date that the income was recorded. This field is display only and will default to the current date when adding a new income record for a Family.
- **Family Size –** The size of the Family. This field is mandatory. If the user hovers over the **(Information Icon)** with the mouse additional information will be displayed about

what to enter as Family size. The Family size is used in the calucaltion to determine if the Client and or Family meet the income requirments to be on the WIC program. For more information, see calculation number one.

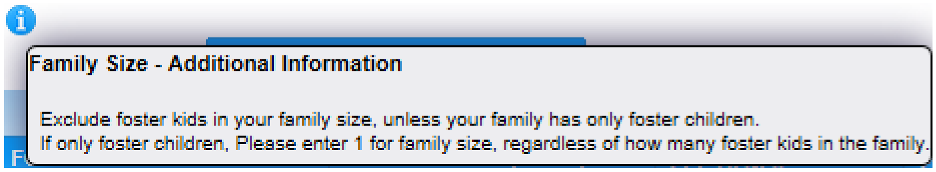


Figure 38: Family Size – Additional Information

- **Unborn Counted** – A checkbox to determine if unborn children are being counted in the Family size. If the checkbox is checked then any unborn children are being included in the Family size. If the checkbox is unchecked, then unborn children are not being included in the Family size.
- **Adjunct Eligibility Grid:** A grid used to record adjunct eligible program statuses for individual Clients within the Family. All Clients will be displayed in individual rows and allow the user to update the status for each adjunct program. Each adjunct program will use a drop down list for selection of status. The options in the drop down will be: Part. Proof, Part No Proof, Referred, Proof Fam Adj Elig, and N/A. It is not mandatory that the user select a status for any program. For more information, refer to background process number one.
  NOTE: The adjunct eligible programs that display can be customized by the State Agency. For more information, see the Referral Programs section of the System Administration DFDD. The five adjunct eligible programs below are based on the Arizona State Agency setup of the HANDS application.
  - **Members** – The last name, first name, and middle initial for a Client within the Family. This field is display only.
  - **AHCCCS (Medicaid)** – If a pregnant mother or an infant in a Family is Part. Proof, then the entire Family is eligible regardless of income. For children over the age of twelve months who are Part. Proof, only the Child is eligible not the entire Family. A Client that has Fam Adj Elig selected will be considered eligible regardless of income.
  - **Food Distribution Program** – If a Client within a Family is Part. Proof, then the entire Family is eligible.
  - **Food Stamps (SNAP) Supple** – If a Client within a Family is Part. Proof, then only the Client is eligible not the entire Family.
  - **Section 8 -** If a Client within a Family is Part. Proof, then the entire Family is eligible.
  - **TANF** – If a Client within a Family is Part. Proof, then the entire Family is eligible.

NOTE: If Part. No Proof is selected for a Client who is not income eligible and participating in the referral program would have made them eligible, the Client will remain income ineligible.

- **Income Providers Grid:** A grid used to display all Family income records.
  - **Income Provider** – The name of the income provider. This field is display only.

   - **Amount** – The amount the Client is paid. This field is display only.
   - **Interval** – How often the Client is paid. This field is display only.
   - **Hours Per Week** – How many hours per week the income provider works. This field is display only. This field will display blank if interval selected is not hourly.
   - **Documentation** – The documentation used as the proof for the income record. This field is display only.

- **Income Breakdown Grid:** A grid used to show a Client's monthly income breakdown for all the Client's income providers. This grid will populate blank when no income providers exist.
   - **Member** – The last name, first name, and middle initial for a Client within the Family. This field is display only.
   - **Provider Details** – Press this button for additional information on how the Client's income is broken down between all the different income providers. Press this button again to close the additional information section of the grid.

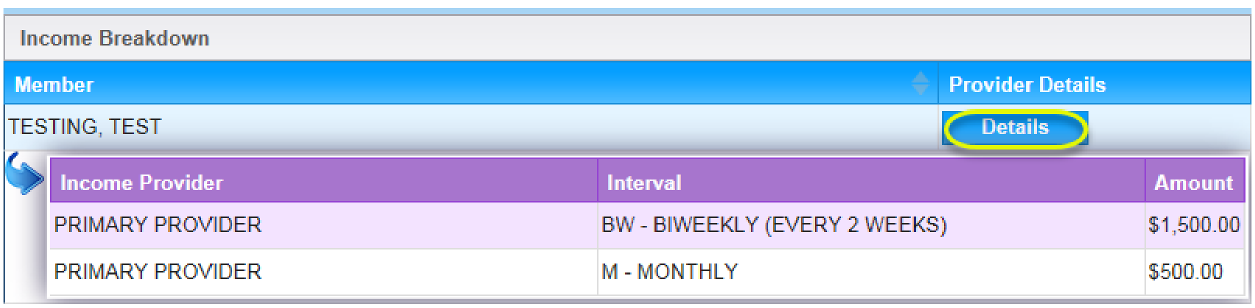


Figure 39:Income Providers Details

- **Migrant** – A checkbox to determine if the head of the household is an individual whose principle employment is on a seasonal basis, who has been so employed within the last 24 months and who establishes, for the purpose of employment, temporary residence. If the checkbox is checked, all Clients within the Family will have the checkbox checked. If this checkbox is checked the system assigns WIC Code 802 for all Clients in the Family.
- **Homeless** – A checkbox to determine if the Family lacks a fixed and regular nighttime address; or whose primary nighttime residence is a homeless facility. Local Agencies must establish that a facility/institution serving homeless Clients meets the conditions stated in the Agency policy. If the checkbox is checked, all Clients within the Family will have the checkbox checked. If this checkbox is checked the system assigns WIC Code 801 for all Clients within the Family.
- **Group Home** – A checkbox that indicates that the Family is in a group home. If the checkbox is checked, all Clients within the Family will have the checkbox checked.
- **Military** – A checkbox that indicates the head of the household is currently in the military or a military dependent. If this checkbox is checked, all Clients within the Family will have the checkbox checked.
- **Refugee** – A checkbox to determine if the Client is a refugee. If the checkbox is checked, all Clients within the Family will have the checkbox checked.

Buttons:

- 

(Add) – Click the Add button to display the add modal and add records to the Income Providers grid.

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Income Tab| Add an Income Provider

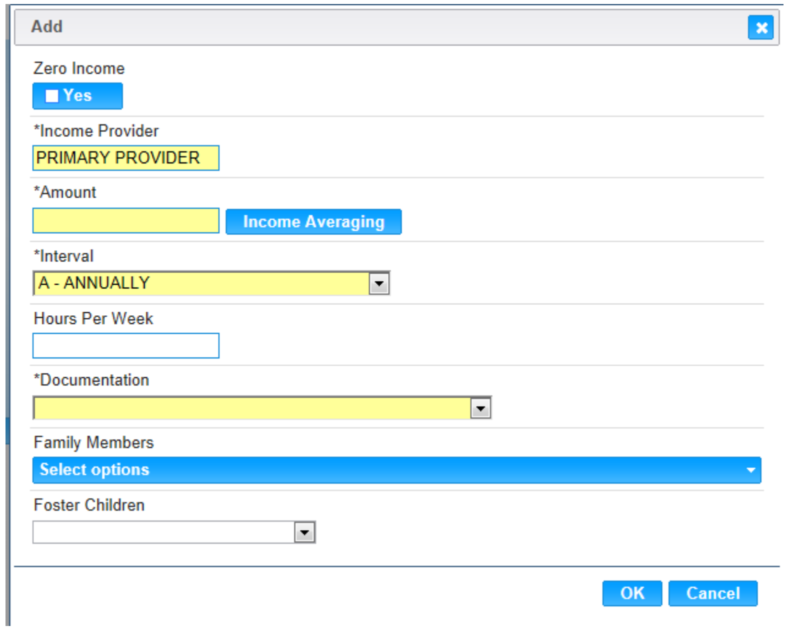


Figure 40: Add an Income Provider Modal

Fields (Add an Income Modal):

- **Zero Income** – A checkbox used to determine zero income. If the checkbox is checked the amount field defaults to zero and is disabled, the interval field defaults to annually and is disabled, and the documentation field defaults to "20-No Proof Exists/Zero Income Signature Form" and is disabled. For more information, see background process number three.
  NOTE: The logic behind the zero-income code is tied specifically to code 20. The system will not work correctly if code 20 is not used in the income verifications base table for the no proof exists/zero income signature form option.
- **Income Provider** – The name of the income provider. This field is mandatory and defaults to "Primary Provider."
- **Amount** – The amount the Client is paid. This field is mandatory and only accepts numbers greater than one.
  NOTE: If the user wishes to enter zero, they would use the zero income checkbox.
- **Interval** – How often the Client is paid. This field is mandatory and selected from a drop down list. For more information, see the Income Interval base table section of this document.
- **Hours Per Week** – How many hours per week the income provider works. This field is mandatory and defaults to forty if the interval selected is hourly if not then this field is disabled.
- **Documentation** – The documentation used as the proof for the income record. For more information see, background process number four. This field is mandatory and selected from a drop down list. For more information, see the Income Sources base table section of this document.

- **Family Members –** A drop down list that contains all non-foster care Clients within the Family. This field is mandatory. The user is allowed to select only one Client or may select multiple to assign the income provider too.
- **Foster Children –** A drop down list that contains all foster care Clients within the Family. This field is mandatory if no Clients are selected from the Family members drop down list. The user may only select one Client.
  NOTE: Foster Children are considered part of their own Family and therefore must be assigned to an income provider record by themselves. Users may not select Family members and Foster Children for the same income provider record.

Buttons (Add an Income Modal):

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

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Income Tab | Add an Income Provider | Income Averaging

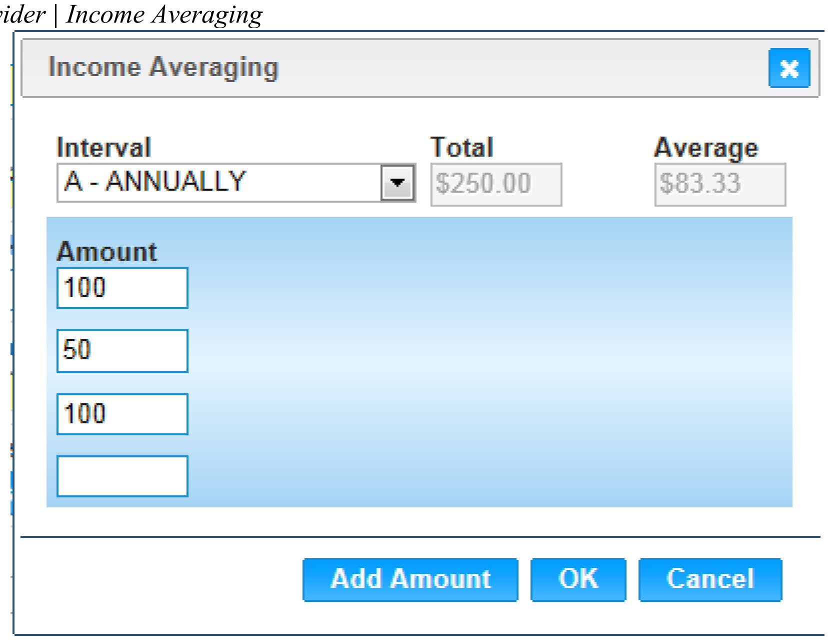


Figure 41: Income Averaging Modal

Fields (Income Averaging Modal):

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

Buttons (Income Averaging Modal):

- **Add Amount –** Press this button to add another amount data entry field to be used for calculating the total and average amount.
- **OK** – Press this button to close the modal. The number displayed in the average field will be displayed in the amount field on the Add an Income modal along with the interval entered.
- **Cancel** – Press this button to close the modal without new data being added.
- **(Close Window) –** The modal is closed without new data being added.
- **OK –** Press this button to close the modal and add a new unsaved record to grid.
- **Cancel –** Press this button to close the modal without a new record being added to the grid.
- **(Close Window) –** The modal is closed without adding a new record to the grid.
- **(Edit Icon) –** Press this button in the income providers grid to open up the edit page to allow for desired modifications to an existing record.
- **(Delete Icon) –** Press this button in the income providers grid to remove an existing record

NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Signatures –** Press this button to navigate to the Signatures page. For more information, see the Signatures section of this document.
- **New Household Income –** Press this button to update Client/Family income records. This button is display only when income date is today. When this button is selected, the screen will refresh with the previous family income (if previous income exists) with a new Income Date. An additional validation will be done in the Cert Action screen to ensure that the adjunct eligibility was done on the Cert Start Date using the adjunct eligibility verification date. For more information, see the Edit an Income section of this document.
- **Save –** Press this button to save changes made to the page. For more information, see background process number two.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) The entered total income for a Client will be validated against the corresponding income level record in the income level base table. The income level record will be selected based on the value entered in the family size field on the income page. The system will display an income ineligible error message and not allow for the user to proceed with the certification if the calculated total income for the Client is higher than the value in the income high field for the corresponding income level record. For more information, see the Income Levels base table section of this document.

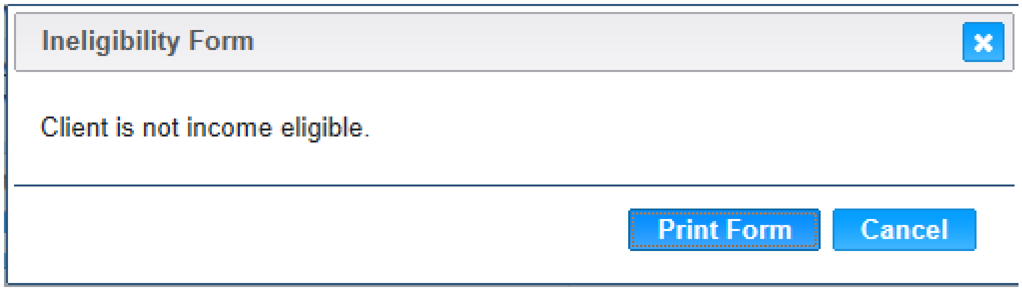


Figure 42: Ineligibility Form

Buttons:

- **Print Form –** Press this button to print the income ineligibility form. For more information, see the forms section of this document.
- **Cancel –** Press this button to close the modal without printing the income ineligiblity form.
- **(Close Window) –** The modal is closed without printing the income ineligibility form.

2) When a family has multiple Income levels, the system will perform the following calculations to calculate the Annual amount the family is receiving. The total amount is then compared to the Income guidelines.
   a. If the interval selected is annually there is no need for a calculation
   b. If the interval selected is weekly, then the system rounds the result received by multiplying the number entered in the amount field by fifty-two.
   c. If the interval selected is monthly, then the system rounds the result received by multiplying the number entered in the amount field by twelve.
   d. If the interval selected is bi-weekly, then the system rounds the result received by multiplying the number entered in the amount field by twenty-six.
   e. If the interval selected is semi-monthly then the system rounds the result received by multiplying the number entered in the amount field by six.
   f. If the interval selected is hourly then the system rounds the result received by multiplying the number entered in the amount field by the number entered in the hourly field, then multiplying that result by fifty-two.
   g. If the interval selected is quarterly, then the system rounds the result received by multiplying the number entered in the amount field by four.
   h. If the interval selected is semi-annually then the system rounds the result received by multiplying the number entered in the amount field by two.

Background Processes:

1) If Part. Proof is selected, it represents the Client/Family is adjunctively eligible for the adjunct program and will receive up to maximum food benefits that the adjunct program allows. If Part No Proof is selected and the Client/Family is not income eligible, the Client/Family will remain ineligible until proof is brought in for the adjunct program. The Client/Family can be on one or more adjunct programs but is only required to show proof for one of the adjunct programs to receive up to maximum food benefits. Adjunct

program data will display on the PC Extract if either Part. Proof or Part No Proof is selected. For more information, see the PC Extract section of the Caseload DFDD document. The Proof Fam Adj Elig option is used for a Client that is eligible based on another Family member. Selecting this option makes the Client eligible the same way as selecting Part. Proof would have. Adjunct Eligibility data entered and saved will be locked during the End of Day process (For more information, see the EOD DFDD). The option that is selected for each adjunct program will be pre-populated for the same adjunct program on the Care Plan: Referrals page. The user will not be able to update the selection for the adjunct program once it has been saved on the income page. However, if the user does not make a selection for any or some of the adjunct programs on the income page, they will be required to on the Care Plan: Referrals page. For more information on the Care Plan: Referrals page, see the Referrals section of the Nutrition Education DFDD.

2) The system performs a six step save process when saving a new Family:
    a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
    b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
    c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
    d. Fourth, it checks to see what statuses have been entered for the adjunct eligible programs if any.
    e. Fifth, it ensures that the calculated monthly income amount is within an acceptable range for the WIC program regarding the Family's size. For more information, see calculation number one.
    f. Finally, after the other five steps have been completed without issue, the system will successfully save the page and add the data to the database. The user will only be able to edit the income record that day. It will become completely disabled after the End of Day process (For more information, see the EOD DFDD).
3) If the Client is adjunctively eligible, the system will not permit an entry of zero income and on save an error message will be displayed. After zero income has been successfully saved for the Client, a form modal will open asking the user if they would like to print the zero income waiver form. For more information on forms, see the Forms section of this document.
4) If the Client has forgotten proof of their income, then the user will select the "10-Forgot Documentation" option from the documentation drop down list.
NOTE: The logic behind the forgot documentation code is tied specifically to code 10. The system will not work correctly if code 10 is not used in the income verifications base table for forgot documentation. The forgot documentation logic is only applied to the clients selected on the income page.
A Client that does not have proof of income will have the forgot documentation icon displayed on their active record and will only be allowed a single month of issuance. The income record will not be locked until thirty days has past, after the thirty days the

income record will become completely disabled. A Client that undergoes an automatic category change during the End of Day process (For more information, see the EOD DFDD) that have the "10-Forgot Documentation" selected and are in a current issue month need their income documentation updated with the appropriate required documentation in order to print additional food benefits. For more information on issuance, see the Food Package Issuance section of the Food Package LA DFDD. Additionally, the Things to Bring portion of the Appointments tab for the Client will be populated with forgot documentation wording that is setup by the State Agency. New client income cannot be added until the actual proof is provided. For more information, see both the Appointment Scheduler and System Administration DFDDs.

4.2 Edit an Income Page

Navigation Path: WIC Services tab | Client/Family Search | Client Information |Edit an Income

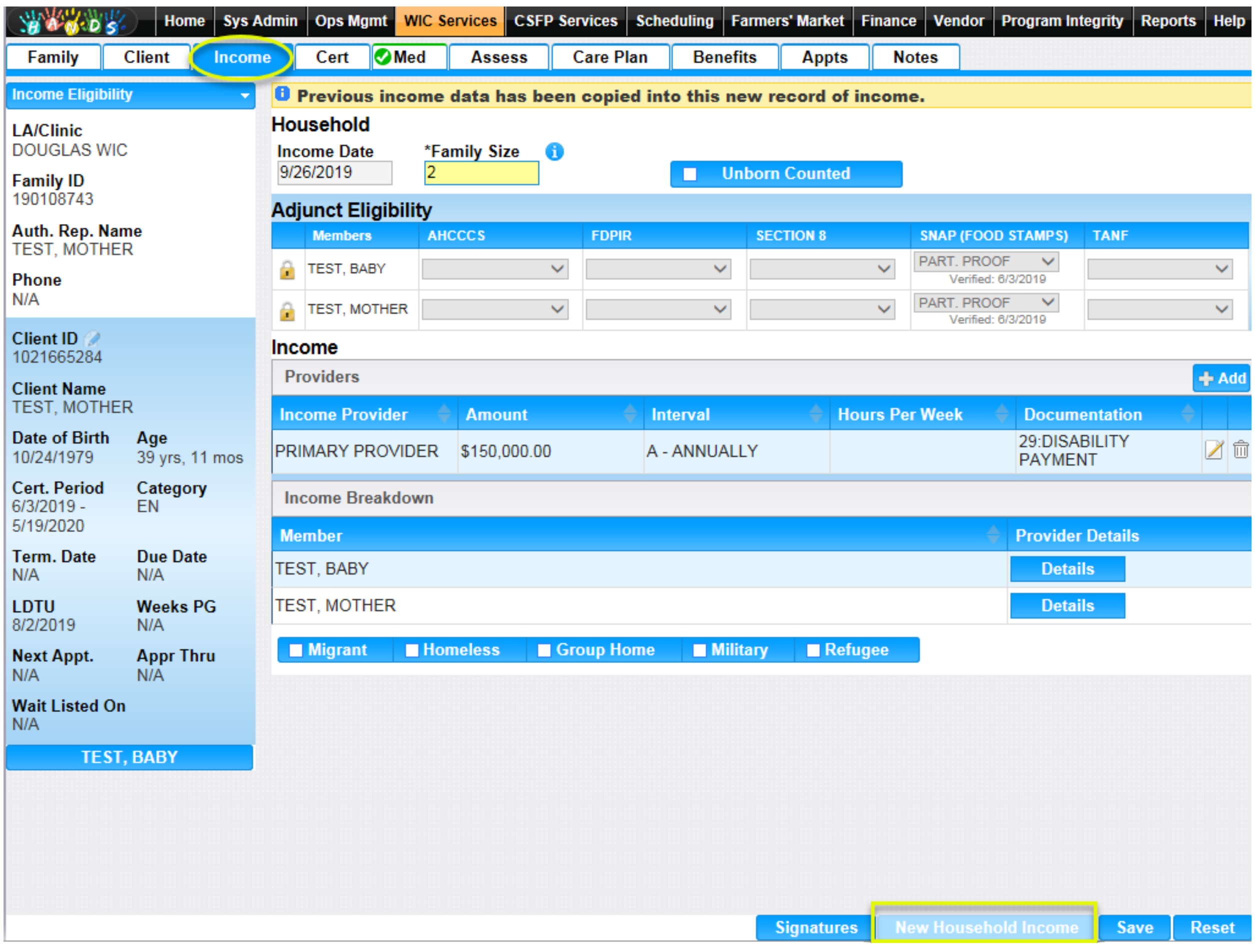


Figure 43: Edit an Income Page

Fields:

- **Income Date** – The date that the income was recorded. This field is display only. If the Income Date is not today the New Household Income button will be available for selection and all fields will be disabled and not updateable until the New Household Income button is pressed.

- **Family Size –** The size of the Family. This field is mandatory. If the user hovers over the **(Information Icon)** with the mouse additional information will be displayed about what to enter as Family size. The Family size is used in the calucaltion to determine if the Client and or Family meet the requirments to be on the WIC program. For more information, see calculation number one.

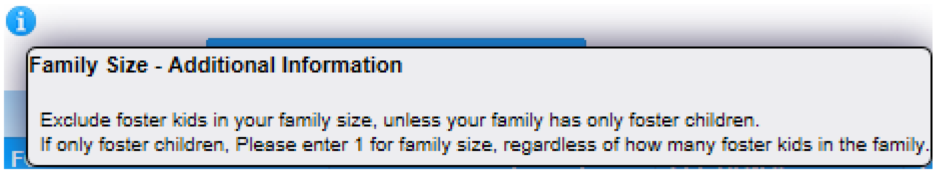


Figure 44: Family Size – Additional Information

- **Unborn Counted –** A checkbox to determine if unborn children are being counted in the Family size. If the checkbox is checked then any unborn children are being included in the Family size. If the checkbox is unchecked, then unborn children are not being included in the Family size.

- **Adjunct Eligibility Grid:** A grid used to record adjunct eligible program statuses for individual Clients within the Family. All Clients will be displayed in individual rows and allow the user to update the status for each adjunct program. Each adjunct program will use a drop down list for selection of status. The options in the drop down will be: Part. Proof, Part No Proof, Referred, Proof Fam Adj Elig, and N/A. It is not mandatory that the user select a status for any program. For more information, refer to background process number one.

  NOTE: The adjunct eligible programs that display can be customized by the State Agency. For more information, see the Referral Programs section of the System Administration DFDD. The five adjunct eligible programs below are based on the Arizona State Agency setup of the HANDS application.
  - **Members –** The last name, first name, and middle initial for a Client within the Family. This field is display only.
  - **AHCCCS (Medicaid) –** If a pregnant mother or an infant in a Family is Part. Proof, then the entire Family is eligible regardless of income. For children over the age of twelve months who are Part. Proof, only the Child is eligible not the entire Family. A Client that has Fam Adj Elig selected will be considered eligible regardless of income.
  - **Food Distribution Program –** If a Client within a Family is Part. Proof, then the entire Family is eligible.
  - **Food Stamps (SNAP) Supple –** If a Client within a Family is Part. Proof, then only the Client is eligible not the entire Family.
  - **Section 8 -** If a Client within a Family is Part. Proof, then the entire Family is eligible.
  - **TANF –** If a Client within a Family is Part. Proof, then the entire Family is eligible.

NOTE: If Part. No Proof is selected for a Client who is not income eligible and participating in the referral program would have made them eligible, the Client will remain income ineligible.

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

- **Income Breakdown Grid:** A grid used to show a Client's income breakdown for all of the Client's income providers. This grid will populate blank when no income providers exist.
  - **Member** – The last name, first name, and middle initial for a Client within the Family. This field is display only.
  - **Provider Details** – Press this button for additional information on how the Client's income is broken down between all the different income providers. Press this button again to close the additional information section of the grid.

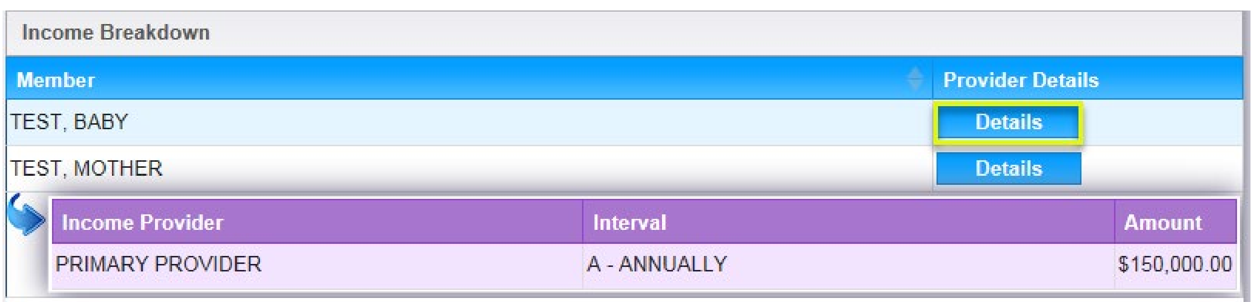


Figure 45: Income Providers Details

- **Migrant** – A checkbox to determine if the head of the household is an individual whose principle employment is on a seasonal basis, who has been so employed within the last 24 months and who establishes, for the purpose of employment, temporary residence. If the checkbox is checked, all Clients within the Family will have the checkbox checked. If this checkbox is checked the system assigns WIC Code 802 for all Clients in the Family.
- **Homeless** – A checkbox to determine if the Family lacks a fixed and regular nighttime address; or whose primary nighttime residence is a homeless facility. Local Agencies must establish that a facility/institution serving homeless Clients meets the conditions stated in the Agency policy. If the checkbox is checked, all Clients within the Family will have the checkbox checked. If this checkbox is checked the system assigns WIC Code 801 for all Clients within the Family.
- **Group Home** – A checkbox that indicates that the Family is in a group home. If the checkbox is checked, all Clients within the Family will have the checkbox checked.
- **Military** – A checkbox that indicates the head of the household is currently in the military or a military dependent. If this checkbox is checked, all Clients within the Family will have the checkbox checked.

- **Refugee –** A checkbox to determine if the Client is a refugee. If the checkbox is checked, all Clients within the Family will have the checkbox checked.

Buttons:

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

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Income Tab| Add an Income Provider

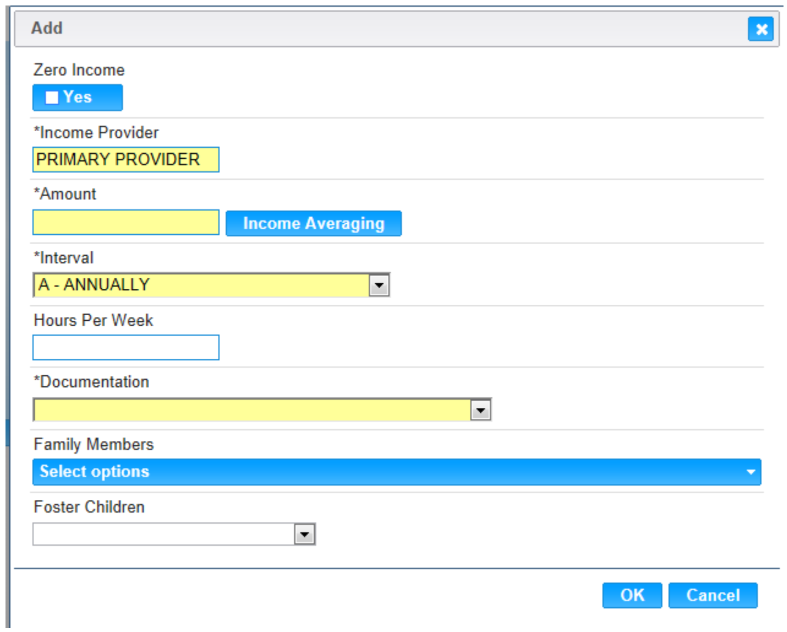


Figure 46: Add an Income Provider Modal

Fields (Add an Income Modal):

- **Zero Income –** A checkbox used to determine zero income. If the checkbox is checked the amount field defaults to zero and is disabled, the interval field defaults to annually and is disabled, and the documentation field defaults to "20-No Proof exists/Zero Income Signature Form" and is disabled. For more information, see background process number three.
  NOTE: The logic behind the zero income code is tied specifically to code 20. The system will not work correctly if code 20 is not used in the income verifications base table for no proof exists/zero income signature form option.
- **Income Provider –** The name of the income provider. This field is mandatory and defaults to "Primary Provider."
- **Amount –** The amount the Client is paid. This field is mandatory and only accepts numbers greater than one.
  NOTE: If the user wishes to enter zero, they would use the zero income checkbox.
- **Interval –** How often the Client is paid. This field is mandatory and selected from a drop down list. For more information, see the Income Interval base table section of this document.
- **Hours Per Week –** How many hours per week the income provider works. This field is mandatory and defaults to forty if the interval selected is hourly if not then this field is disabled.

- **Documentation –** The documentation used as the proof for the income record. For more information see, background process number four. This field is mandatory and selected from a drop down list. For more information, see the Income Sources base table section of this document.
- **Family Members –** A drop down list that contains all non-foster care Clients within the Family. This field is mandatory. The user is allowed to select only one Client or may select multiple to assign the income provider too.
- **Foster Children –** A drop down list that contains all foster care Clients within the Family. This field is mandatory if no Clients are selected from the Family members drop down list. The user may only select one Client.
  NOTE: Foster Children are considered part of their own Family and therefore must be assigned to an income provider record by themselves. Users may not select Family members and Foster Children for the same income provider record.

Buttons (Add an Income Modal):

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

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Income Tab | Add an Income Provider | Income Averaging

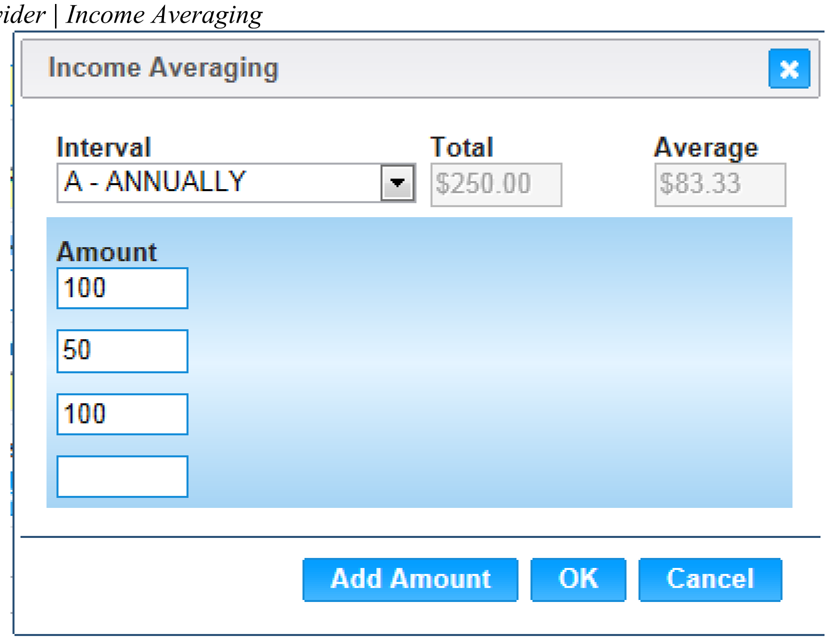


Figure 47: Income Averaging Modal

Fields (Income Averaging Modal):

- **Interval –** How often the Client is paid. This field is mandatory, defaults too annually, and selected from a drop down list.
- **Total –** The sum of the amount fields (Add the amount fields displayed on the modal with data entered together).

        - **Average –** The calculated average of the amount fields (Take the number displayed in the total and divide by the number of amount fields displayed on the modal with data entered). This field is display only.
        - **Amount –** The amount the Client is paid. This field is mandatory and only accepts numbers greater than one.

      Buttons (Income Averaging Modal):

        - **Add Amount –** Press this button to add another amount data entry field to be used for calculating the total and average amount.
        - **OK** – Press this button to close the modal. The number displayed in the average field will be displayed in the amount field on the Add an Income modal along with the interval entered.
        - **Cancel** – Press this button to close the modal without new data being added.
        - **(Close Window) –** The modal is closed without new data being added.
    - **OK –** Press this button to close the modal and add a new unsaved record to grid.
    - **Cancel –** Press this button to close the modal without a new record being added to the grid.
    - **(Close Window) –** The modal is closed without adding a new record to the grid.
    - **(Edit Icon) –** Press this button in the income providers grid to open up the edit page to allow for desired modifications to an existing record.
    - **(Delete Icon) –** Press this button in the income providers grid to remove an existing record.
      NOTE: Edit and Delete changes will not become permanent until the page is saved.
- **Signatures –** Press this button to navigate to the Signatures page. For more information, see the Signatures section of this document.
- **New Household Income –** Press this button to update Client/Family income records. This button is display only when income date is today.
- **Save –** Press this button to save changes made to the page. For more information, see background process number two.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) The entered total income for a Client will be validated against the corresponding income level record in the income level base table. The income level record will be selected based on the value entered in the family size field on the income page. The system will display an income ineligible error message and not allow for the user to proceed with the certification if the calculated total monthly income for the Client is higher than the value in the income high field for the corresponding income level record. For more information, see the Income Levels base table section of this document.

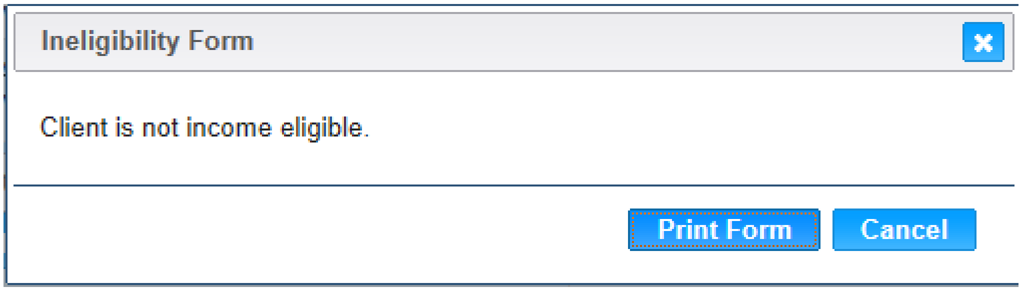


Figure 48: Ineligibility Modal

Buttons:

- **Print Form –** Press this button to print the income ineligibility form. For more information, see the forms section of this document.
- **Cancel –** Press this button to close the modal without printing the income ineligiblity form.
- **(Close Window) –** The modal is closed without printing the income ineligibility form.

2) When a family has multiple Income levels, the system will perform the following calculations to calculate the Annual amount the family is receiving. The total amount is then compared to the Income guidelines.
    a. If the interval selected is annually there is no need for a calculation
    b. If the interval selected is weekly, then the system rounds the result received by multiplying the number entered in the amount field by fifty-two.
    c. If the interval selected is monthly, then the system rounds the result received by multiplying the number entered in the amount field by twelve.
    d. If the interval selected is bi-weekly, then the system rounds the result received by multiplying the number entered in the amount field by twenty-six.
    e. If the interval selected is semi-monthly then the system rounds the result received by multiplying the number entered in the amount field by six.
    f. If the interval selected is hourly then the system rounds the result received by multiplying the number entered in the amount field by the number entered in the hourly field, then multiplying that result by fifty-two.
    g. If the interval selected is quarterly, then the system rounds the result received by multiplying the number entered in the amount field by four.
    h. If the interval selected is semi-annually then the system rounds the result received by multiplying the number entered in the amount field by two.

Background Processes:

1) If Part. Proof is selected, it represents the Client/Family is adjunctively eligible for the adjunct program and will receive up to maximum food benefits that the adjunct program

allows. If Part No Proof is selected and the Client/Family is not income eligible, the Client/Family will remain ineligible until proof is brought in for the adjunct program. The Client/Family can be on one or more adjunct programs but is only required to show proof for one of the adjunct programs to receive up to maximum food benefits. Adjunct program data will display on the PC Extract if either Part. Proof or Part No Proof is selected. For more information, see the PC Extract section of the Caseload DFDD document. The Proof Fam Adj Elig option is used for a Client that is eligible based on another Family member. Selecting this option makes the Client eligible the same way as selecting Part. Proof would have. Adjunct Eligibility data entered and saved will be locked during the End of Day process (For more information, see the EOD DFDD). Lock icons will be placed next to Client names in the adjunct eligibility grid after the New Household Income button is pressed. A verified date is displayed below each adjunct program that has had a status selected in the past (The username of the person who previously saved the status is also recorded but it is not displayed). The user is not able to update the status for the adjunct programs once they have become locked and the user is within an active certification. If the lock icon is clicked an error message will be displayed informing the user that the referrals cannot be updated because the Client is within an active certification.

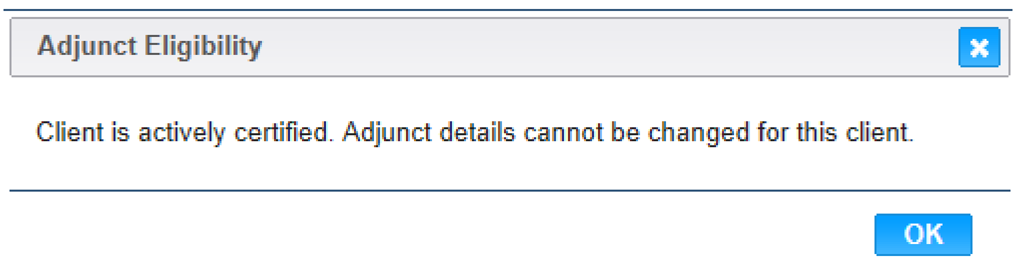


Figure 49: Adjunct Eligibility Modal

The option that is selected for each adjunct program will be pre-populated for the same adjunct program on the Care Plan: Referrals page. The user will not be able to update the selection for the adjunct program once it has been saved on the income page. However, if the user does not make a selection for any or some of the adjunct programs on the income page, they will be required to on the Care Plan: Referrals page. For more information on Referrals, see the Referrals section of the Nutrition Education DFDD.

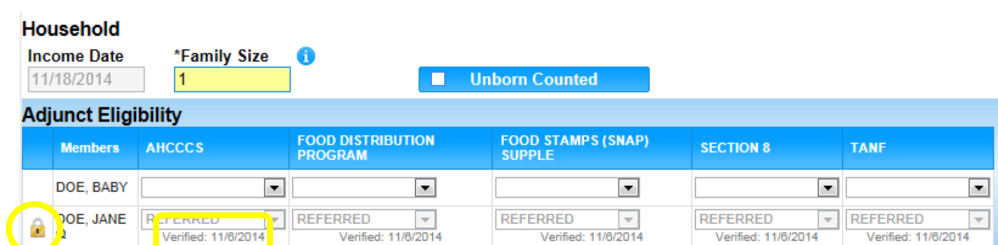


Figure 50: Adjunct Eligibility Lock Icon

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

a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
d. Fourth, it checks to see what statuses have been entered for the adjunct eligible programs if any.
e. Fifth, is ensures that the calculated income amount is within an acceptable range for the WIC program regarding the Family's size. For more information, see calculation number one.
f. Finally, after the other five steps have been completed without issue, the system will successfully save the page and add the data to the database. The user will only be able to edit the income record that day. It will become completely disabled after the End of Day process (For more information, see the EOD DFDD).

3) If the Client is adjunctively eligible, the system will not permit an entry of zero income and on save an error message will be displayed. After zero income has been successfully saved for the Client, a form modal will open asking the user if they would like to print the zero income waiver form. For more information on forms, see the Forms section of this document.
4) If the Client has forgotten proof of their income, then the user will select the "10-Forgot Documentation" option from the documentation drop down list.
NOTE: The logic behind the "forgot documentation" code is tied specifically to code 10. The system will not work correctly if code 10 is not used in the income verifications base table for forgot documentation. The forgot documentation logic is only applied to the clients selected on the income page.
A Client that does not have proof of income will have the "forgot documentation" icon displayed on their active record and will only be allowed a single month of issuance. The income record will not become completely disabled until thirty days has past, after the thirty days the income record will become completely disabled. A Client that undergoes an automatic category change during the End of Day process (For more information, see the EOD DFDD) that have the "10-Forgot Documentation" selected and are in a current issue month need their income documentation updated with the appropriate required documentation in order to print additional food benefits. For more information on issuance, see the Food Package Issuance section of the Food Package LA DFDD. Additionally, the Things to Bring portion of the Appointments tab for the Client will be populated with forgot documentation wording that is setup by the State Agency. For more information, see both the Appointment Scheduler and System Administration DFDDs.

5 CERTIFICATION ACTION PAGE

Narrative:

The purpose of this page is to establish a WIC certification period and category of eligibility. Besides assigning new certifications to a Client this page is used for maintaining a Client's certification along with performing re-certifications. The user will be able to perform category changes, extend certifications, and terminate certifications from this page as well. The State Agency staff will have the ability to disqualify a Client (For more information, see the Disqualification section of the System Administration DFDD).

5.1 Add a New Certification Page

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Add a Certification

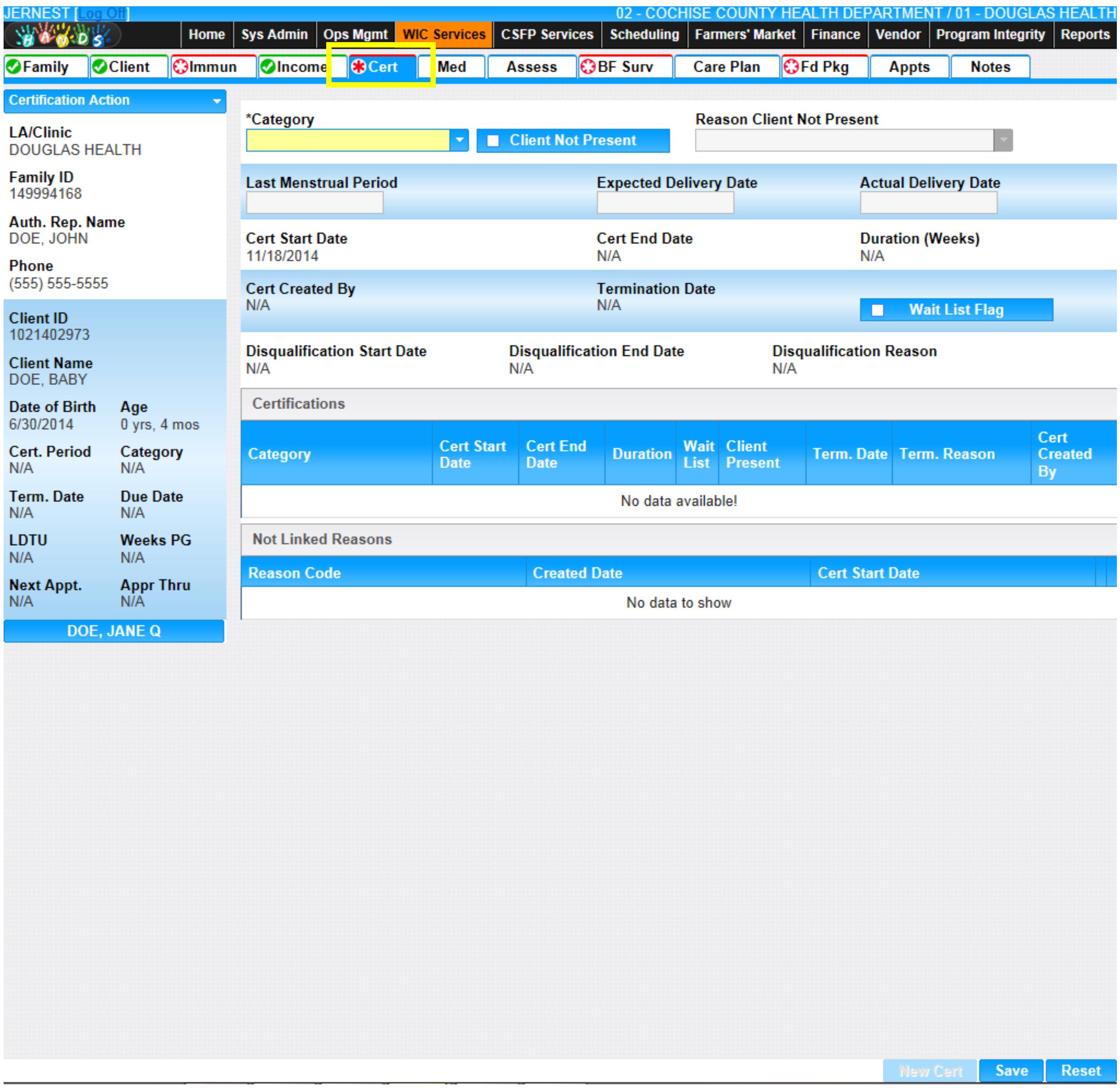


Figure 51: Add a New Certification Page

NOTE: The entire certification action page will be disabled if the register to vote? (Family information page), proof of identity (Client information page), Data Sharing, and income collection date (Income page) have all not been saved today. Error messages will be displayed at the top of the certification action page indicating what fields needs to be updated before the page can be used. The user will not be able to change the current saved certification after the end of day process has run, the complete assessment button has been pressed, or food benefits have been issued.

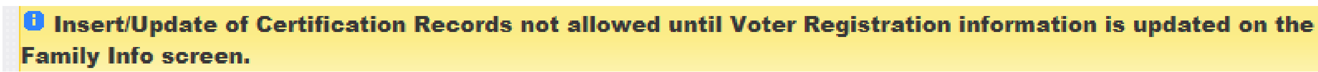


Figure 52: Must update Voter Registration error message

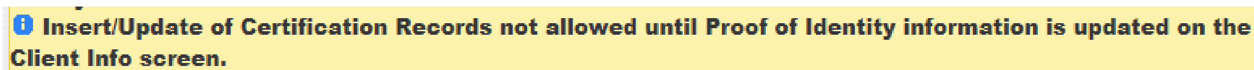


Figure 53: Must update Client Proof of Identity error message

Figure 54: Must update Client Proof of Identity error message

Figure 55: Must update Data Sharing error message

NOTE: If the user adds a medical record, saves an assessment record, and saves a food package on the assignment page for the current certification without clicking the complete assessment button but then decides they need to update the Client's category the same day as it was originally created, they must also update all three pages. The user will be forced to update the Client's medical (For more information, see the Medical section of this document), assessment (For more information, see the Assessment section of this document), and the assigned food package (For more information, see the Food Package Assignment section of the Food Package LA DFDD). This prevents the user from printing benefits or completing the assessment with the same saved data for medical, assessment, and assigned food package from different Client categories on the same day for the same Client. For more information on Client category change, see the category change process within this section of the document.
Fields:

- **Category –** The category of the Client. This field is mandatory and selected from a drop down list. Options in the drop down list will be filtered by the Client's age (For more information, see calculation number one). For more information, see the Categories base table section of this document.
- **Client Not Present –** A checkbox to determine if the Client being assigned a certification record is present. This field is optional. If the checkbox is checked then the Client was not present for the certification. If the checkbox is unchecked, then the Client was present for the certification.

- **Reason Client Not Present –** The reason that the Client was not present at the time the certification was being assigned. This field is mandatory if the Client not present checkbox is checked. If the Client not present checkbox is unchecked, then this field is disabled.
- **Last Menstrual Period –** The last menstrual period of the Client. This field is mandatory if expected delivery date is not entered if Client category is either PG1 or PG2. If expected delivery date is entered, then the field will automatically be populated with the last menstrual period. For more information, see calculation number two. For all other categories the field will be disabled. The field is stored in the format MM/DD/YYYY. The user can either select the date from the calendar wizard provided or by manually entering the date. When manually entering the date, the user does not need to enter the forward slash (/) it will be automatically populated.
- **Expected Delivery Date –** The expected delivery date of the Client. This field is mandatory if last menstrual period is not entered if Client category is PG1 or PG2. If last menstrual period is entered, then the field will automatically populate with the expected delivery date. For more information, see calculation number three. This field is mandatory if Client category is C1, IEN, IPN, IPN+, or IFF. For all other categories the field will be disabled. The field is stored in the format MM/DD/YYY. The user can either select the date from the calendar wizard provided or by manually entering the date. When manually entering the date, the user does not need to enter the forward slash (/) it will be automatically populated. The expected delivery date field must be after today's date and before today's date plus eleven months. For Client's less than two years old the expected delivery date must be at least eight days greater and not more than twenty-one days from the Client's date of birth to be considered Early Term Delivery (Risk Code – 142.2). For Client's less than two years old the expected delivery date must be at least twenty-one days greater and not more than one hundred and fifty days from the Client's date of birth to be considered premature or a Preterm Delivery (Risk Code – 142.1). A Client that is considered premature will have PREMATURE displayed at the top of the certification action page. A premature Client will also have two data points plotted on medical graphs. One data point for adjusted age and one data point for actual age. For more information, see the Infant/Child Medical section of this document.
- **Actual Delivery Date** – The actual delivery date of the Client. This field is mandatory if Client category is EN, PN, PN+, and P. For all other categories the field will be disabled. The field is stored in the format MM/DD/YYY. The user can either select the date from the calendar wizard provided or by manually entering the date. When manually entering the date, the user does not need to enter the forward slash (/) it will be automatically populated. The actual delivery date cannot be after today's date. The actual delivery date must be within six months of today's date if Client category is P. The actual delivery date must be within one year of the today's date if Client category is EN, PN, or PN+. For more information, see background process number one.
- **Cert Start Date** – The certification start date for the Client's new certification record. This field is display only and defaults to today's date.
- **Cert End Date** – This certification end date for the Client's certification record. This field is display only and is calculated based on the Client's category. The expected delivery date field must have data entered before the certification end date can be calculated if Client category is either PG1 or PG2. The actual delivery date field must

have data entered before the certification end date can be calculated if Client category is EN, PN, PN+, or P. For all other categories the cert end date will already be populated. The certification end date must be greater than the certification start date. For more information, see calculation number four.

- **Duration (Weeks)** – The duration in weeks of the Client's certification period. The certification duration is the number of weeks between the Client's certification start date and end date. This field is display only.
- **Cert Created By** – The logged in username of the user who saved the Client's certification. This field is display only.
- **Termination Date** – That date in which the Client's certification was terminated. This field is display only and will display N/A if the Client's certification has not been terminated.
- **Wait List Flag –** A checkbox to determine if the Client has been placed on the waiting list. If the checkbox is checked then the Client has been placed on the waiting list. If the checkbox is unchecked, then the Client is not on the waiting list.
- **Disqualification Start Date** – The date that State Agency staff has started the disqualification of the Client's certification record. This field is displayed only.
- **Disqualification End Date** – The date that State Agency staff has ended the disqualification of the Client's certification record.
- **Disqualification Reason** – The reason that State Agency staff has disqualified the Client's certification record.
  NOTE: For more information on disqualification, see the disqualification section of the System Administration DFDD.
- **Certifications Grid**: A grid used to display the Client's saved certification record. This grid will be empty if the user is saving a new certification and will display certification changes relative the initial certification start date.
  - **Category –** The category of the Client's saved certification record. This field is display only.
  - **Cert Start Date –** The certification start date of the Clients saved certification record. This field is display only.
  - **Cert End Date –** The certification end date of the Client's saved certification record. This field is display only.
  - **Duration –** The duration of the Client's saved certification record. This field is display only and calculated based on the number of weeks between the certification start and end date.
  - **Wait List –** A flag used to determine if the Client is on the waiting list or not. This field will display a Y if the wait list flag was saved as being checked on the Client's saved certification record. This field will display an N if the wait list flag was saved as being unchecked on the Client's saved certification record. This field is display only.
  - **Client Present –** A flag used to determine if the Client was present at the time of the certification or not. This field will display a Y if the Client not present flag is saved as unchecked for the Client's saved certification record. This field will display an N if the Client not present flag is saved as checked for the Client's saved certification record. This field is display only.

- **Term. Date –** That date in which the Client's certification was terminated. This field is display only and will display blank if the Client's certification has not been terminated.
- **Term. Reason –** The reason why the Client's certification was terminated. This field is display only and will display blank if the Client's saved certification record has not been terminated.
- **Cert Created By –** The logged in username of the user who created the Client's certification record. This field is display only.

- **Not Linked Reasons Grid:** A grid to record the reason that the Client is not linked to another Client. Data displayed in this grid will also display in the not linked reasons grid on the Client Information page. For more information, see background process number two.
  - **Reason Code –** The reason that the Client is not linked to another Client.
  - **Created Date –** The date in which the not linked reason was saved.
  - **Cert Start Date –** The certification start date of the Client's certification record in which the not linked reason was saved.

Buttons:

- **New Cert –** Press this button to add a new certification for the Client. This button will only be available after an initial certification has been saved. Additionally, the Client cannot have two open certifications at once. If a Client does have an open certification and the new cert button is pressed an error message will be displayed informing them that the initial certification must be terminated before a new certification can be added.

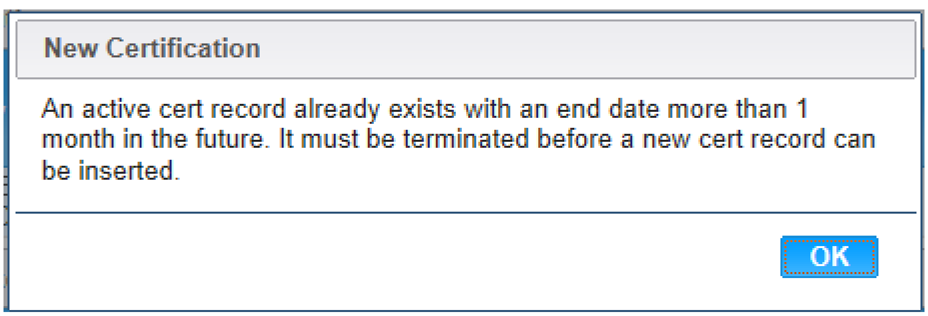


Figure 56: Two open certifications error message

- **Category Change –** Press this button to perform a Client category change. For more information, Category Change section of this document.
- **Extend Cert –** Press this button to extend a Client's certification by thirty days. This button is only available for infant and child category Clients. This button will be disabled if Client's category is not that of an infant or child.
- **Terminate Cert –** Press this button to terminate a Client's certification. For more information, see the Termination section of this document.
- **Disqualify –** Press this button to disqualify a Client's certification. This button will be disabled and is only available for State Agency staff. The user must be logged in at the

State level in order for this button to be enabled. For more information, see the Disqualification section of the System Administration DFDD.

- **Reinstate Cert –** Press this button to reinstate a Client's terminated certification. This button will be disabled unless the Client's certification has been terminated.
- **Save –** Press this button to save changes made to the page. For more information, see background process number three.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) The category drop down list is filtered based on the Client's age at the time of the certification start date. The following table is used to calculate Client categories:

Age:	Category Must be:
>= 0 and < 12 months	Infant Categories
>= 12 and < 24 months	C1
>= 24 and < 36 months	C2
>= 36 and < 48 months	C3
>= 48 and < 60 months	C4
>= 60 and < 72 months	C5
>= 9 and < 60 years	Women Categories

2) If the expected delivery date is entered, the date that will populate in the last menstrual period field is calculated by using, the expected delivery date minus forty weeks.
3) If the last menstrual period is entered, the date that will populate in the expected delivery date field is calculated by using, the last menstrual period plus forty weeks.
4) The certification end date field is populated based on the Client's age and certification category. The following table is used to calculate the certification end date.

Client Category:	Certification End Date Calculation:
Pregnant (PG1, PG2)	Expected Delivery Date + 42 days
Postpartum (P)	(Actual Delivery Date + 6 months) - 1 day
Breastfeeding (EN, PN, PN+)	(Actual Delivery Date + 12 months) - 1 day
Infants (IEN, IPN, IPN+, IFF)	One day prior to Client's 1st birthday
Children (C1, C2, C3, C4)	Cert Start Date + 12 months (or for C4- Last day of the Month child turns 5 yrs)

Background Processes:

1) A postpartum or breastfeeding mother that is linked to an infant will have the actual delivery date field automatically populated with the date of birth for the infant that

provides her with the longest certification period. However, the actual delivery date must also match the mother's certification category.

2) A postpartum or breastfeeding mother must be linked to an infant or a reason not linked must be saved for the Client. If the Client is an infant category the infant must be linked to a postpartum or breastfeeding mother or a reason not linked must be saved. The link between mothers and infants is made on the Client information page through the Mother ID and mother outside of Family fields. If no link exists between Clients, then the reason not linked modal will open and the user can add a reason that no link exists. If a reason not linked is not saved for the Client and no link exists between a mother and infant or infant and mother (Depending on the Clients category) then the reason not linked modal will appear every time the user navigates away from the certification action page and back. Additionally, an error message will appear when the user attempts to complete the assessment for the Client (For more information, see Care Plan section of the Nutrition Education DFDD). An error message will also appear on the issuance page and food benefits will not be allowed to be issued for the Client unless a reason not linked is saved or the Client is linked. For more information, see the Issuance section of the Food Package LA DFDD.

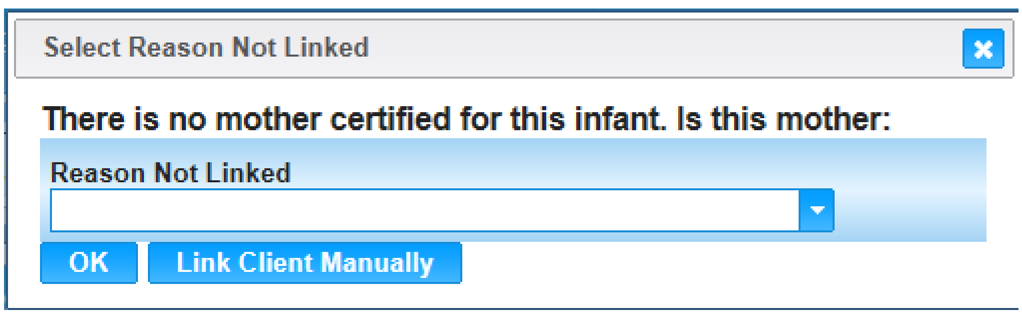


Figure 57: Reason Not Linked Modal

Fields:

- **Reason Not Linked** – The reason that the Client is not linked to a mother if the Client is an infant category. If the Client is either a postpartum or breastfeeding category, then the reason that the Client is not linked to an infant. This field is mandatory if the OK button is pressed.

Buttons:

- **OK** – Press this button to close the modal and add a reason not linked to the Clients record. Pressing this button makes the reason not linked field mandatory.
- **Link Client Manually** – Press this button to close the modal and not add a reason not linked to the Clients record.
- **(Close Window)** – The modal is closed without adding a new record to the grid.

3) The system performs a six step save process when saving a new certification record:
   a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.

b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
d. Fourth, it ensures that postpartum or breastfeeding mothers are linked to infants or a reason not linked is saved and vice versa. (The certification can still be saved by the user pressing the link Client manually button on the reason not linked modal. However, if the user does not link the Client manually and does not save a reason not linked then error messages will appear on other pages when trying to make the Client active and/or issue the Client food benefits.)
e. Fifth, it ensures that postpartum or breastfeeding mothers that are linked to an infant or multiple infant are linked correctly. If not, an error message will be thrown and the user will have to either update the Client records or unlink the two Clients and save a reason not linked for both. The following scenarios are used to determine the correct linking between mothers and their babies:
   - Moms linked to an infant must have an actual delivery date that matches the infant that the mother is linked too. If not, then the user can either update the mother's actual delivery date to match the date of birth of the infant or they can update the infant's date of birth to match the mother's actual delivery date.
   - To accommodate the linking of multiple infants from different pregnancies, the system will all a date range of less than twelve months from the date of birth and actual delivery date. However, to allow linking multiple infants from one pregnancy to a mother, the date of births and actual delivery date must be within plus or minus ninety days.
   - Mom's breastfeeding status must match that of the infants she is linked too. The chart below displays the allowed breastfeeding status matches between linked mothers and infants.

Mother	**Infant**
EN	IEN
PN	IPN
PN+	IPN+
P	IFF

   - The system will perform a check to ensure that moms linked to multiple infants are the category that will provide them with the package that will provide the mom with the maximum benefits. If the mother's breastfeeding status does not match the infant with the highest (EN, PN, PN+, P) breastfeeding status, the system will inform the user through the use of a warning message at the top of the certification action page. The message will let the user know that if the mother wants to change categories to the breastfeeding status of the other infant that she will be able to receive more benefits.

   - If a mother's food package is based off the linkage of an older infant (and she has a younger infant on the program), when the older infant turns one year of age this will terminate the mother's certification. To avoid terminating the mother's certification, the system will provide a message to instruct the user to change the mother's breastfeeding status to match the younger infant to remain eligible.

f. Finally, after the other steps have been completed without issue, it successfully saves the page and adds the data to the database. The Client's certification record will be displayed in the certifications grid. The user will be able to edit the current certification record on the page until the complete assessment button has been pressed or food benefits have been issued. (For more information, see both the Care Plan section of the Nutrition Education DFDD and the Issuance section of the Food Package LA DFDD) If the user has not completed the assessment or issued food benefits the end of day process will lock the certification action page (For more information, see the EOD DFDD).

5.2 Edit a Certification Page

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Edit a Certification

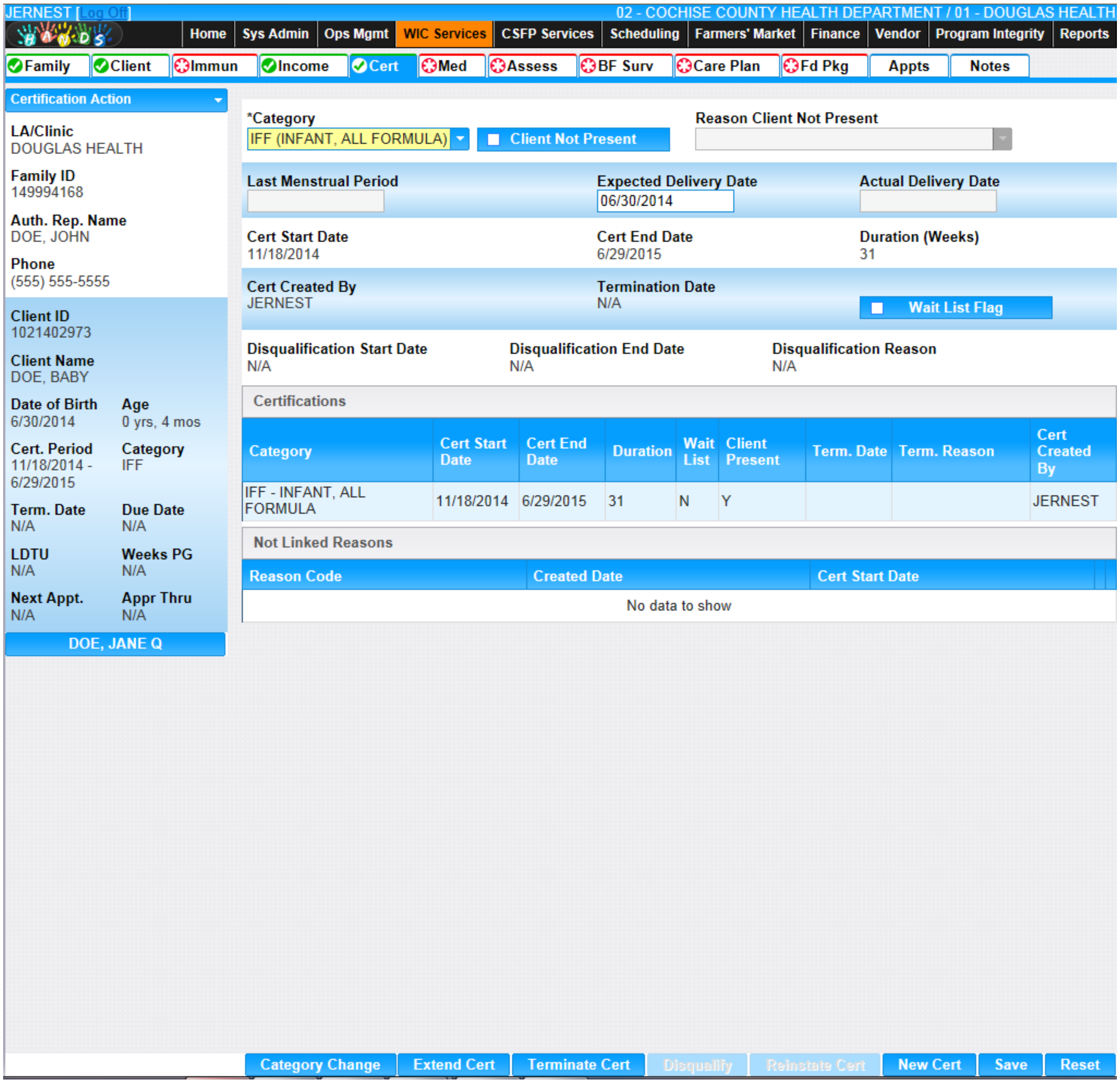


Figure 58: Edit a Certification Page

NOTE: The edit a certification page is the same as the add a new certification page.

5.3 Category Change

Narrative:

The purpose of this modal is to perform Client category changes. The user will access the modal from pressing the category change button on the certification action page after the end of day process (For more information, see the EOD DFDD) has been completed. The user will not press the category change button when updating a Client's certification on the same day that it was created. In these cases, the user will simply select a different category from the category drop down list and save the certification action page. After the end of day process the user will have to update the Family's register to vote? Field in order to access the modal.

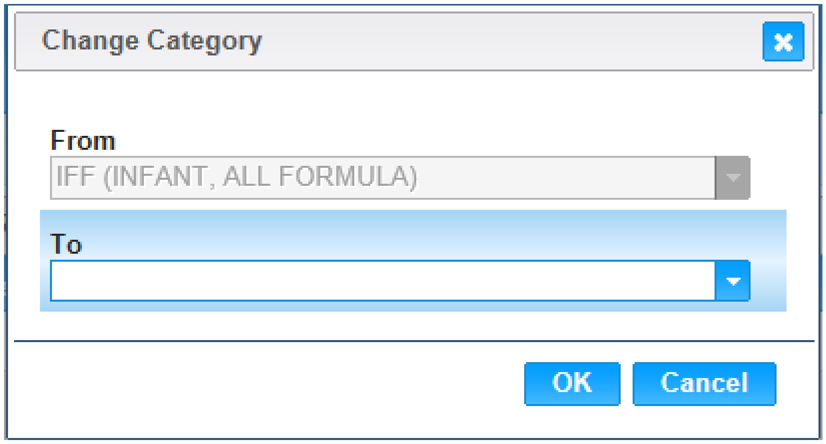


Figure 59: Category Change Modal

Fields:

- **From** – The current category of the Client. This field is display only.
- **To** – The category that the user is attempting to change the Client too. This field is mandatory and selected from a drop down list.

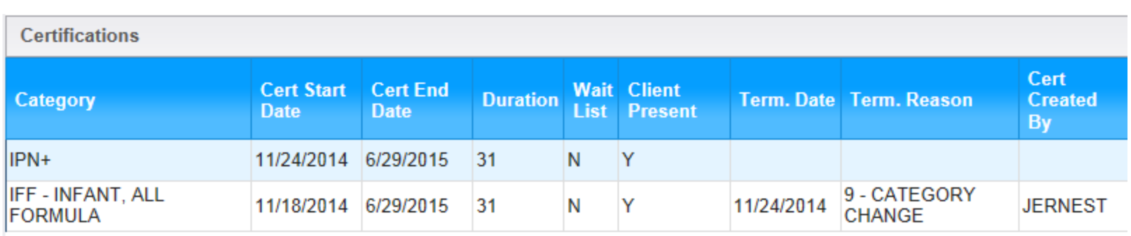
Buttons:

- **OK –** Press this button to close the modal, terminate the original certification, and adds a new certification for the new category. The change will not be committed until the save button is pressed on the certification action page. For more information, see background process number one.
- **Cancel –** Press this button to close the modal without any changes happening to the Client's certification.
- **(Close Window) –** The modal is closed without any changes happening to the Client's certification.

Calculations: None

Background Processes:

1) The system terminates the current certification period, setting the termination date to today's date and populates the termination reason with the 'category change' termination code. The system also creates another certification period for the new category with the certification start date set to today's date.



Certifications

Category	Cert Start Date	Cert End Date	Duration	Wait List	Client Present	Term. Date	Term. Reason	Cert Created By
IPN+	11/24/2014	6/29/2015	31	N	Y			
IFF - INFANT, ALL FORMULA	11/18/2014	6/29/2015	31	N	Y	11/24/2014	9 - CATEGORY CHANGE	JERNEST

Figure 60: Category Change

The certification end date will remain the same for infant certification category changes. Allowable category changes for infants are:

From Category:	To Category:
IEN	IPN
IEN	IFF
IPN	IEN
IPN	IFF
IFF	IEN
IFF	IPN

For mother category changes the certification end date will be updated based on the Client's new category. Allowable category changes for mothers and their new calculated end date are:

From Category:	To Category:	New Certification End Date:
Breastfeeding (EN, PN, PN+)	Postpartum	Lesser of the Client's previous certification end date. Actual Delivery Date plus six months
Postpartum (P)	Breastfeeding	Greater of the Client's previous certification end date. Actual Delivery Date plus 12 Months minus 1 day

Note: Category Changes for PG categories are not allowed. A new Certification needs to be done for all PG categories whom are now Postpartum/Breastfeeding.

The category change will not be committed until the user clicks the save button on the certification action page. After the save has been completed successfully a message will appear at the top of the page informing the user of the pages they need to update before being able to print food benefits.

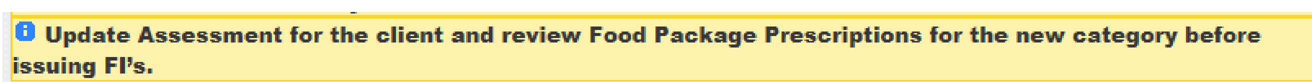


Figure 61: Category Change Update Message

2) The system will perform automatic category changes during the end of day process for Clients who are turning one or for those Clients turning two within their current certification period. For more information, see the EOD DFDD.

5.4 Termination

Narrative:
The purpose of this modal is to terminate Clients from the WIC program. The user will access the modal from pressing the termination button on the certification action page after the end of day process (For more information, see the EOD DFDD) has been completed. After the end of day process the user will have to update the Family's register to vote? Field in order to access the

modal. Once the Client has been terminated the user will be able to void any food benefits that have been issued and print a notice of ineligibility.

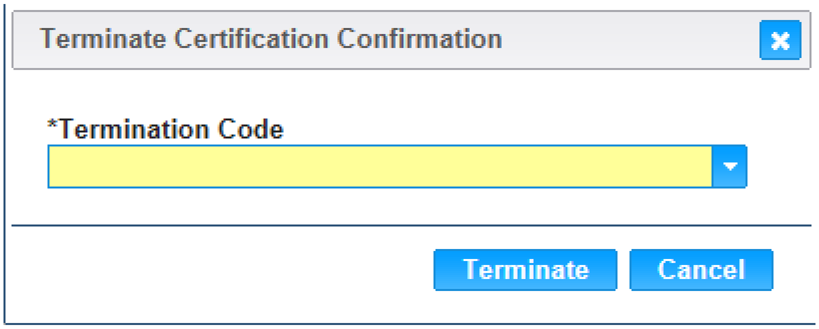


Figure 62: Termination Modal

Fields:

- **Termination Code –** The reason the Client is being terminated. This field is mandatory if the user presses the terminate button. This field is selected from a drop down list. For more information, see the Termination Reasons base table section of this document.

Buttons:

- **Terminate –** Press this button to terminate the Clients current certification. For more information see background process number one.
- **Cancel –** Press this button to close the modal without any changes happening to the Client's certification.
- **(Close Window) –** The modal is closed without any changes happening to the Client's certification.

Calculations: None

Background Processes:

1) The system will populate the termination reason field on the certification action page with the selected termination reason and populate the termination date field with today's date. The Client will become inactive and additional food benefits cannot be issued. A modal will open asking the user if they wish to print a notice of ineligibility.

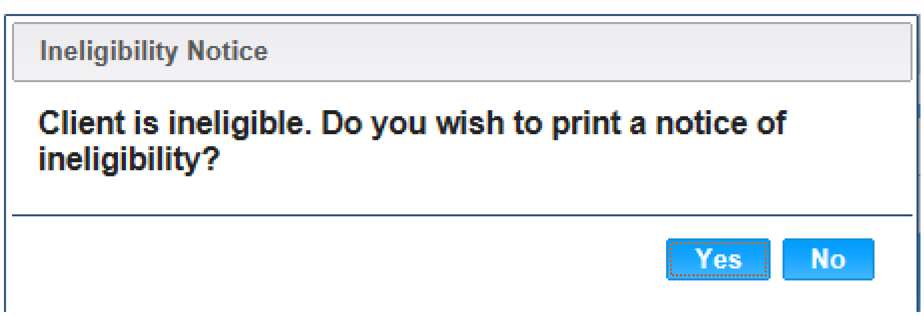


Figure 63: Print Ineligibility Notice Modal

Buttons:

- **Yes** – Press this button to close the modal and print the notice of ineligibility. For more information, see the Forms section of this document
- **No** – Press this button to close the modal and not print the notice of ineligibility.

If the Client who is being terminated has been issued food benefits the system will open a modal asking the user if they wish to void the issued food benefits.

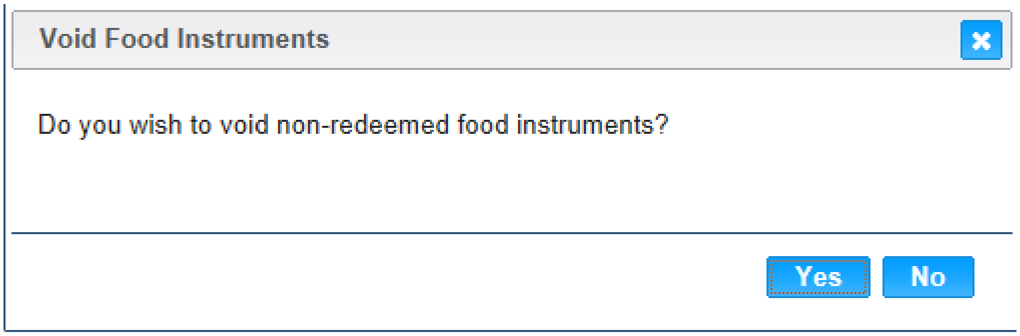


Figure 64: Void Food Instruments Modal

Buttons:

- **Yes** – Press this button to close the modal and void all of the non-redeemed food instruments for the Client. Pressing this button will automatically navigate the user to the Void/Reissuance page. For more information, see the Void/Reissue section of the Food Package LA DFDD.
- **No** – Press this button to close the modal and not void the Client's food instruments.

2) The end of day process will delete all future appointments scheduled for the Client after the Client's termination. The end of day will also perform automatic terminations for Client's meeting the scenarios described below. For more information, see the EOD DFDD.

    a. The Client is postpartum, and today's date is one hundred and eighty days after the actual delivery date.

    b. The Client is breastfeeding, and today's date is three hundred and sixty-five days after the actual delivery date.

    c. The Client is five years of age and today's date is the last day of the calendar month in the Client turned five.

    d. The Client's current certification period has expired and there is not a new certification period.

6 INFANT/CHILD MEDICAL PAGE

Narrative:
The purpose of these pages is to record/view anthropometric measurements and blood work data for infants and children. The Client's entire history of medical data is displayed. The anthropometric measurements are displayed by default in English but have the ability to change and display the measurements in Metric units. The user can enter the measurements in either English or Metric units. NCHS percentiles are displayed based on the measurements entered and the national average for infants and children of the same age. Standing or recumbent measurements can be recorded for infants or children and several graphs are used to display the Client measurements (For more information, see the Graphs section of this document). Anthropometric measurements and blood work data must be recorded within ninety days of each certification start date for children to receive food benefits. For infants, bloodwork data is not required, but anthropometric data must be collected for the certification period.

6.1 Add a New Medical Record

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Add a New Medical Record

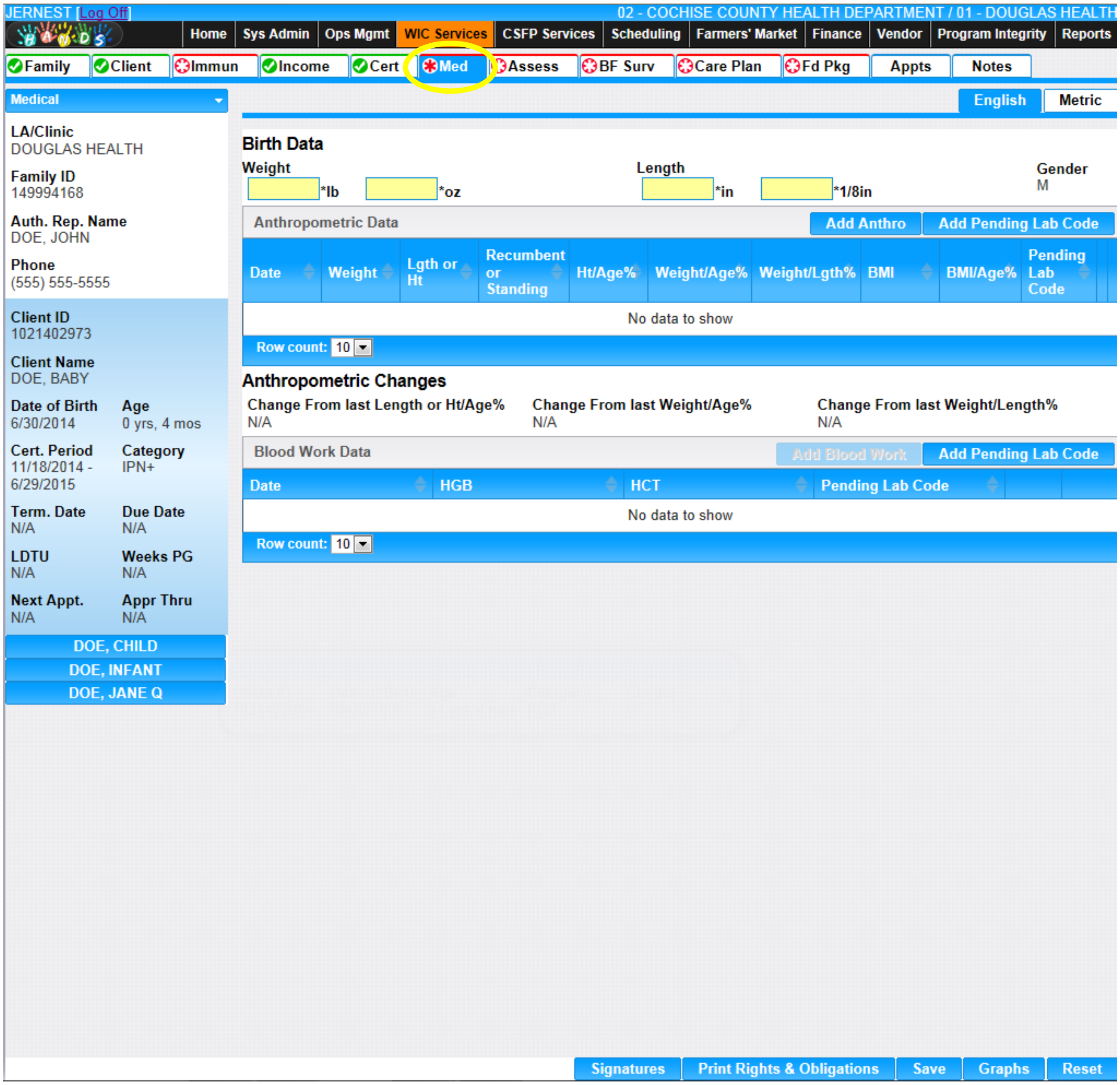


Figure 65: Add a New Medical Record

NOTE: The user can switch the display from English to Metric by clicking the English or Metric tabs.

For more information on English to Metric conversions, see calculations one thru four.

Fields:

- **Weight:** Fields used to record the Client's birth weight. These fields will be disabled if the page is viewed by a different user then the one that originally entered them. If today's date is not the data in which the data was entered the fields will also be disabled.
  - **lb** – The birth weight of the Client in pounds. This field is mandatory.

- **oz –** The birth weight of the Client in ounces. This field is mandatory and only accepts integers between 0-15.

- **Length:** Fields used to record the Client's birth length. These fields will be disabled if the page is viewed by a different user then the one that originally entered them. If today's date is not the data in which the data was entered the fields will also be disabled.
  - **in –** The birth length of the Client in inches. This field is mandatory.
  - **1/8in –** The birth length of the Client in eighths of an inch. This field is mandatory and only accepts integers between 0-7.

- **Anthropometric Data Grid:** A grid used to display saved anthropometric data records for the Client. Records in this grid will be disabled if today's date is not the date in which the record was created, or the page is not being used by the user that originally created them.
  - **Date –** The date that the anthropometric measurement was taken. This field is display only.
  - **Weight –** The weight of the Client. This field is display only.
  - **Lgth or Ht –** The length or height of the Client. This field is display only.
  - **Recumbent or Standing –** Indicates if the length or height measurement was taken while the Client was recumbent (R) or standing (S). This field is display only.
  - **Ht/Age% –** The percentiles of measurements for height for age are calculated referencing the NCHS guidelines defined in the NCHS data table. This field is display only. For more information, see calculation number six.
  - **Weight/Age% –** The percentiles of measurements for weight for height are calculated referencing the NCHS guidelines defined in the NCHS data table. This field is display only. For more information, see calculation number seven.
  - **Weight/Lgth% –** The percentiles of measurements for weight for length are calculated referencing the NCHS guidelines defined in the NCHS data table. This field is display only. No data will be displayed in this field if the length or height of the Client is taken when the Client was standing. For more information, see calculation number eight.

  NOTE: For more information, see the NCHS data base table section of this document.

  - **BMI –** The body max index value calculated for males, ages two to five years old; females two to twenty years old. Calculations and values displayed are based on the BMI formula provided by the CDC and are calculated by the system. This field is display only.
  - **BMI/Age% -** The percentile of other children of the same gender and age, which have a lower BMI. If the BMI/Age% for the Client is above 95%, the field is displayed in the color fuchsia. This field is display only and only calculated when Clients are measured standing. For children 24-36 months of age with recumbent lengths entered this field will display N/A.

  NOTE: For more information on BMI, see calculations number nine and ten.

  - **Pending Lab Codes –** The pending lab code selected for the Client. This field is display only. For more information, see the add a pending lab code button.

- **Change from last Weight/Length% –** The calculated Weight/Length% change from the last anthropometric measurement record. This field is display only and displays N/A if no other records exist.

- **Change from last Length or Ht/Age% –** The calculated Length or Ht/Age% change from the last anthropometric measurement record. This field is display only and displays N/A if no other records exist.

- **Change from last Weight/Age% –** The calculated Weight/Age% change from the last anthropometric measurement record. This field is display only and displays N/A if no other records exist.
  NOTE: For more information, see calculation number nine.

- **Blood Work Data Grid:** A grid used to display saved blood work data records for the Client. Records in this grid will be disabled if today's date is not the date in which the record was created, or the page is not being used by the user that originally created them.
  - **Date –** The date that the blood work data record was taken. This field is display only.
  - **HGB** – Hemoglobin levels. This field is display only.
  - **HCT** – Hematocrit levels. This field is display only.
  - **Pending Lab Code** – The pending lab code selected for the Client. This field is display only. For more information, see the a pending lab code button.

Buttons:

- **Add Anthro –** Press this button to display the add modal and add records to the anthropometric data grid.

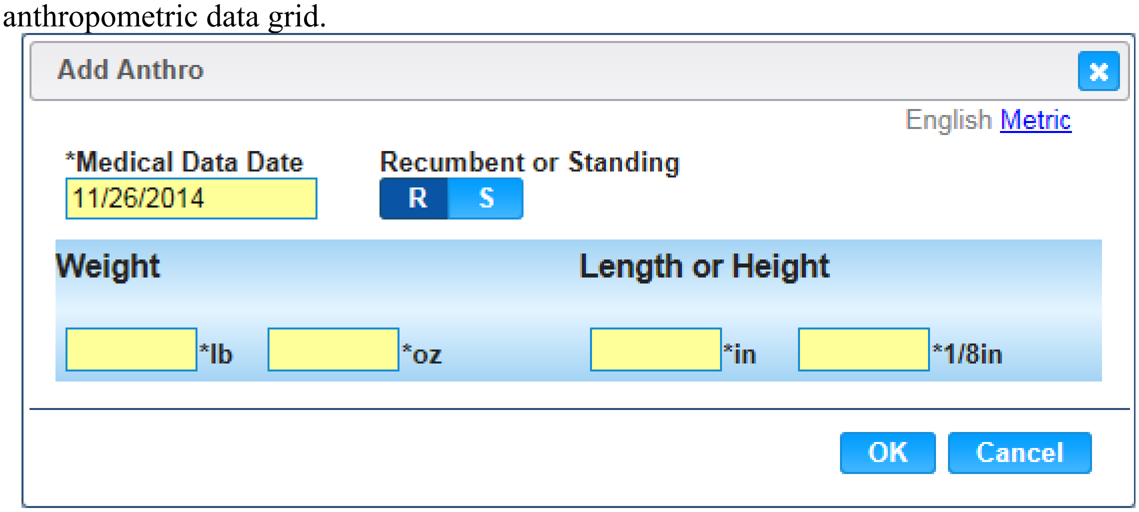


Figure 66: Add Anthro Modal

Fields (Add Anthro Modal):

- **Medical Data Date –** The date that the anthropometric measurement was taken. This field is mandatory and defaults to today's date. The date entered cannot be in the future, before the Client's date of birth, or more than 60 days in the past.

- **Recumbent or Standing –** Selection options (R or S) to determine if the length or height measurements were taken while the Client was recumbent (R) or standing (S). This field is mandatory. The field will default to R and not allow a selection of S for Clients less than two years old. The field will default to S for Clients older than two, but the user has the ability to override the default value for Clients between the ages of 24 and 36 months.

- **Weight:** The entered weight is validated against the low weight and high weight values for the Clients gender and age as setup by the State Agency in the weight height ranges base table. For more information, see the Weight Height Ranges base table section in this document.
  - **lb –** The weight of the Client in pounds. This field is mandatory.
  - **oz –** The weight of the Client in ounces. This field is mandatory and only accepts integers from between 0-15.

- **Length or Height:** The entered length or height is validated against the low length or height and high length or height values for the Clients gender and age as setup by the State Agency in the weight height ranges base table. For more information, see the Weight Height Ranges base table section in this document.
  - **in –** The length or height of the Client in inches. This field is mandatory.
  - **1/8in –** The length or height of the Client in eighths of an inch. This field is mandatory and only accepts integers from 0-7.

NOTE: An error message will be displayed on the page and the record will not be allowed to be saved if the data entered for length or height value or weight is outside of the corresponding record in the weight height ranges base table. The error message will inform the user that the data entered is outside of the range and that they must contact the State Agency so the State Agency can adjust the weight height range base table records. The State Agency will adjust the weight height range base table records to account for the Clients data. A warning message will be displayed on the page and the user will be allowed to save the data entered if the data entered is inside the corresponding record in the weight height ranges base table but not the NCHS Data base table. The warning message will inform the user that the data entered is outside of the NCHS Data graphing limits and will not be displayed.

Buttons (Add Anthro Modal):

- 

– Press the metric button to enter data in metric untis or to convert it. Data will display by default in English units.
- **OK –** Press this button to close the modal and add a new unsaved record to the grid.
- **Cancel –** Press this button to close the modal without adding a new record to the grid.
- **(Close Window) –** The modal is closed without adding a new record to the grid.
- **(Edit Icon) –** Press this button to open up the edit page to allow for desired modifications to an existing record.
- **(Delete Icon) –** Press this button to remove an existing record.

NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Add Pending Lab Code –** Press this button to display the add modal and add records to the anthropometric data grid. A pending lab code record may not be added to the grid if an anthropometric measurement with the same medical data date already exists. Additionally, an anthropometric measurement is required at the date of the certification visit; therefore, a pending lab code may not be used at the initial certification of the Client. For more information, see background process number one.

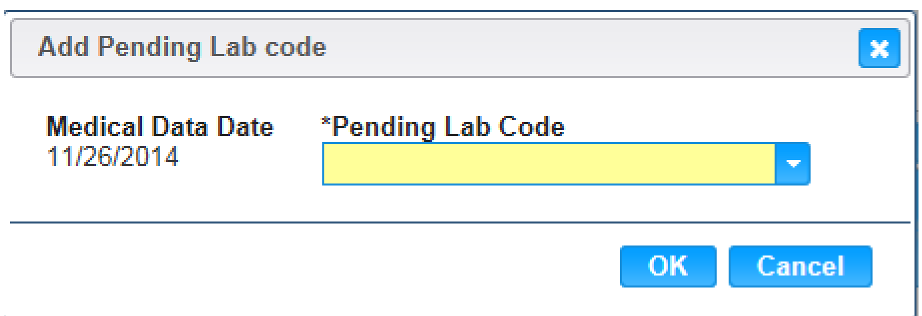


Figure 67: Add Pending Lab Code Modal

Fields (Add Pending Lab Code Modal):

- **Medical Data Date –** The date that the pending lab code was applied instead of anthropometric measurement data for the Client. This field is disabled and defaults to today's date.
- **Pending Lab Code –** The pending lab code of the Client. This field is mandatory and selected from a drop down list. For more information, see the Pending Lab Code base table section of this document.

Buttons (Add Pending Lab Code Modal):

- ➢ **OK –** Press this button to close the modal and add a new unsaved record to the grid.
- ➢ **Cancel –** Press this button to close the modal without adding a new record to the grid.
- ➢ **(Close Window) –** The modal is closed without adding a new record to the grid.
- ➢ **(Edit Icon) –** Press this button to open up the edit page to allow for desired modifications to an existing record.
- ➢ **(Delete Icon) –** Press this button to remove an existing record.

NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Add Blood Work –** Press this button to display the add modal and add records to the blood work data grid. The user will not be allowed to add a blood work record for Clients less than 9 months old. For Clients greater than or equal to 9 months either a pending lab code or a blood work record will be required.

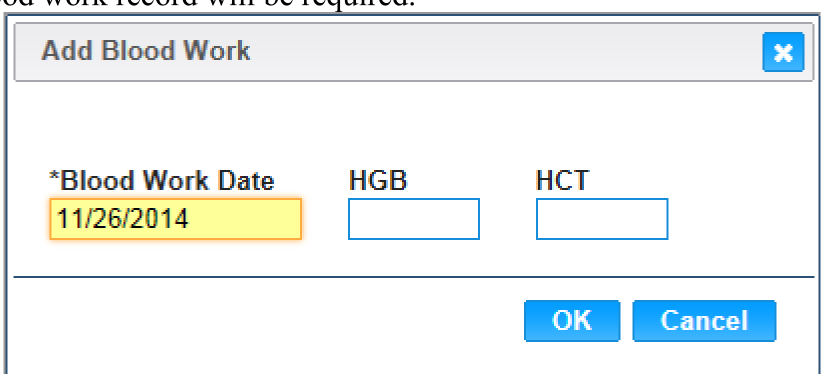


Figure 68: Add Blood Work Modal

Fields (Add Blood Work Modal):

- ➢ **Medical Data Date –** The date that blood work was taken. This field is mandatory and defaults to today's date. The date entered cannot be in the future, before the Clients date of birth, or more than 90 days in the past.
- ➢ **HGB –** The hemoglobin blood work value of the Client. This field is mandatory if data has not been entered in the HCT field. The field only accepts values of 5.0 – 24.1.
- ➢ **HCT –** The hematocrit blood work value of the Client. This field is mandatory if data has not been entered in the HGB field. This field only accepts values of 18.0 – 72.1.

NOTE: The user has the ability to enter data in both the HGB and HCT fields. The blood work data entered is validated against acceptable ranges to determine what WIC Codes need to be assigned if any. For more information, see background process number two.

Buttons (Add Blood Work Modal):

- ➢ **OK –** Press this button to close the modal and add a new unsaved record to the grid.
- ➢ **Cancel –** Press this button to close the modal without adding a new record to the grid.
- ➢ **(Close Window) –** The modal is closed without adding a new record to the grid.
- ➢ **(Edit Icon) –** Press this button to open the edit page to allow for desired modifications to an existing record.
- ➢ **(Delete Icon) –** Press this button to remove an existing record.

NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Add Pending Lab Code –** Press this button to display the add modal and add records to the blood work grid. A pending lab code record may not be added to the grid if a blood work data record with the same medical data date already exists. For more information, see background process number one. The user will not be allowed to enter a pending lab code for blood work for a Client less than 9 months old. For Clients greater than or equal to 9 months a pending lab code or a blood work record will be required.

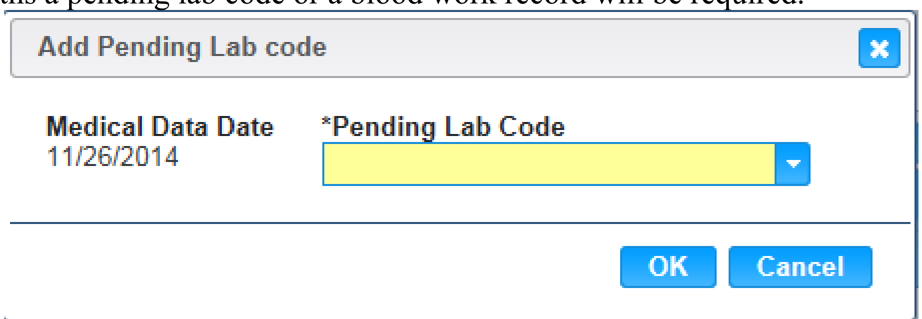


Figure 69: Add Pending Lab Code Modal

Fields (Add Pending Lab Code Modal):

- ➢ **Medical Data Date –** The date that the pending lab code was applied instead of a blood work data record for the Client. This field is disabled and defaults to today's date.
- ➢ **Pending Lab Code –** The pending lab code of the Client. This field is mandatory and selected from a drop down list. For more information, see the Pending Lab Code base table section of this document.

Buttons (Add Pending Lab Code Modal):

- ➢ **OK –** Press this button to close the modal and add a new unsaved record to the grid.
- ➢ **Cancel –** Press this button to close the modal without adding a new record to the grid.
- ➢ **(Close Window) –** The modal is closed without adding a new record to the grid.

- **(Edit Icon) –** Press this button to open up the edit page to allow for desired modifications to an existing record.
- **(Delete Icon) –** Press this button to remove an existing record.

NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Signatures –** Press this button to navigate to the Signatures page. For more information, see the Signatures section of this document.
- **Print Rights & Obligations –** Press this button to populate the rights & obligations form. For more information, see the Forms section of this document.
- **Save –** Press this button to save changes made to the page. For more information, see background process number four.
- **Graphs –** Press this button to navigate to the Graphs page. For more information, see the Infant/Child Graphs section of this document.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) **Metric weight in grams** = English weight in ounces * 28.3495
2) **English weight in ounces** = Metric weight in grams * 0.03527396
3) **Metric height in millimeters** = English height in eighths of an inch * 3.1496
4) **English height in eighths of an inch** = Metric height in millimeters * 0.3175
5) **Ht/Age%** is determined by comparing the age and the height values converted to metric with the metric meas. val 1 (Age in months) and metric meas. val 2 (Height in centimeters) values in the NCHS Data table, the NCHS type is determined by the value of the R/S field. If the R/S field is set to 'S' the 'STAAGE' NCHS type is used, if R/S is set to 'R' the 'LGTAGE' NCHS type is used. If the exact height is not found in the NCHS data table, the system selects the next higher height.
6) **Weight/Age%** is determined by comparing the weight and age values converted to metric with metric meas. val 1 (Age in months) and metric meas. val 2 (Weight in grams) values in the NCHS Data table.
7) **Weight/Lgth%** is determined by comparing the height and weight values converted to metric with the metric meas. val 1 (Height in centimeters) and metric meas. val 2 (Weight in Kilograms) values in the NCHS Data table, the NCHS type is determined by the value of the R/S field. If the R/S field is set to 'S' the 'WGTSTA' NCHS type is used, if R/S is set to 'R' the 'WGTLGT' NCHS type is used.
8) The following calculations are based off of the two most recent records.
   a. **Change from last Weight/Length%** = Current record Wt/Length% - Previous record Wt/Length%.
   b. **Change from last Length or Ht/Age%** = Current record Ht/Age% - Previous record Ht/Age%.
   c. **Change from last Wt/Ht%** = Current record Weight/Ht% - Previous record Wt/Ht%.

9) **BMI English Formula:** BMI = [Weight in pounds / Height in inches / Height in inches] x 703

10) **BMI Metric Formula:** BMI = [Weight in kilograms / Height in cm / Height in cm] x 10,000

11) The following table represents the logic behind system assigned WIC Codes related to infants and children.

Age	WIC Code	Logic
Birth to 24 months	103.1	Assigned if the calculated weight for length percent is less than or equal to the 2nd percentile on the WHO birth to 24 months gender specific weight for length graph. The Client will also be considered high risk.
Birth to 24 months	103.2	Assigned if the calculated weight for length percent is greater than the 2nd percentile and less than or equal to the 5th percentile on the WHO birth to 24 months gender specific weight for length graph. The Client will not be considered high risk.
Birth to 24 months	115	Assigned if the calculated weight for length percent is greater than or equal to the 98th percentile on the birth to 24 months WHO birth to 24 months gender specific weight for length graph.
Birth to 12 months	114	Assigned if the mother linked to the Client had a BMI greater than or equal to 30 at the time of conception or any point in the first trimester (1-3 months) of the pregnancy. The mother's pre-pregnancy weight will be used to calculate her BMI.
Greater than 12 months	114	Assigned if mother linked to the Client had a BMI greater than or equal to 30 at the time of the certification and there is data in the system to calculate this. If the mother is pregnant again or has had a baby within the past 6 months, her pre-pregnancy weight will be used instead of her current weight.
2 - 5 years old	103.1	Assigned if the calculated BMI for age percent is less than or equal to the 5th percentile on the CDC 2-20 years gender specific BMI for Age graph. The Client will also be considered high risk.
2 - 5 years old	103.2	Assigned if the calculated BMI for Age percent is greater than the 5th percentile and less than or equal to the 10th percentile on the CDC 2-20 years gender specific BMI for Age graph. The Client will not be considered high risk.
2 - 5 years old	113	Assigned if the calculated BMI for Age percent is greater than or equal to the 95th percentile on the CDC 2-20 years gender specific BMI for Age graph.

2 - 5 years old	114	Assigned if the calculated BMI for Age is greater than or equal to the 85th percentile and less than or equal to the 95th percentile on the CDC 2-20 years gender specific BMI for Age graph.

NOTE: For infants and children under the age of 2 who were born at or before 37 weeks gestation (premature) adjusted age vs actual age will display on the graphs. All WIC Code calculations will be based on the Client's actual age not the adjusted age.

Background Processes:

1) The use of a pending lab code for anthropometric and blood work data when it is required will limit the issuance of food benefits to the number of months as setup by the State Agency in the pending lab code base table for the pending lab code base table record used. The user can enter a pending lab code on a monthly basis but will only be allowed to issue the number of months as setup by the State Agency of benefits each time. The State Agency also can limit the recurrence of the pending lab code. For more information on pending lab code setup, see the pending lab code base table section of this document. For more information on issuance, see the Issuance section of the Food Package LA DFDD.

2) The bloodwork data entered is validated against records setup by the state agency in the Category Blood Works base table (For more information, see the Category Blood Works base table section of this document). The system determines the acceptable range by checking the type of blood work data entered (HGB or HCT), Client's category, age range, and elevation. The Client's elevation is determined by using the elevation of the Clinic that the Client is in. For more information, see the Organizational Units section of the Operations Management DFDD. If the system determines that the entered value is below the low value for the blood work type, then WIC Code 201 will be automatically assigned to the Client.

3) For infant Clients if the birth weight entered is less than 5 lbs. 8 oz. the system will automatically assign WIC Code 141. If the birth weight entered is greater than or equal to 9 lbs. the system will automatically assign WIC Code 153. The system will assign WIC Code 141 if the entered birth weight is less than 5 lbs. 8 oz. for children less than 24 months old.

The system performs a four step save process when saving a new medical record:

a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
d. Finally, after the other three steps have been completed successfully the system adds the entered data to the database.

4) The mid-cert health check icon will be displayed on the Client's active record if the Client meets the following criteria:

Category	Logic
All infant and Child Client categories	Icon will be displayed if no medical data record with a date created exists on or after 140 days of the active certification start date

A mid-certification medical update may assign new WIC Codes, but the priority of the Client, may only be raised and not lowered. For more information on Priority, see the Care Plan section of the Nutrition Education DFDD. The medical update will also not remove WIC Codes that have already been saved for the Client even if they no longer apply for historical reasons. Instead the WIC Codes that no longer apply will have the active flag on the care plan page unchecked. For more information, see the Care Plan section of the Nutrition Education DFDD.

5) The missing medical icon will be displayed on the Client's active record if the Client meets the following criteria:

Category	Logic
All infant and child Client Categories	Icon will be displayed if a pending lab code was used for the most recent anthropometric or a blood work data record and is no longer valid

6) If height and weight measurements are outside of graphing limits, i.e. the measurements cannot be found in the NCHS data base table the system displays a warning message to the use, "The measurements entered are outside of the NCHS graphing limits and will not be displayed on the growth charts."

The table below is used to determine appropriate weight gains for infants from birth to 6 mo. of age:

Age:	Ave. Weight Gain in ounces per day:
Birth - 1 mo.	4.5oz/7days
1 - 2 mo.	6.25oz/7days
2 - 3 mo.	4.5oz/7days
3 - 4 mo.	4oz/7days
4 - 5 mo.	3.5oz/7days
5 - 6 mo.	3oz/7days

The actual weight gain calculation is based on two weights taken at least 1 mo. apart, the system computes the weight gain by taking the weight from the most recent anthropometric record and subtracting it from the most recent previous anthropometric record that is at least 1 mo. from the new record.

The table below is used to determine appropriate weigh gains for infants/children from 6 mo. to 59 mo. of age:

Age:	Ave. Weight Gain in ounces per day:
6 - 12 mo.	2.25oz/7days
12 - 59 mo.	0.6oz/7days

The actual weight gain calculation is based of two weights taken at least 3 mo. apart, the system computes the weight gain by taking the weight from the most recent anthropometric record and subtracting it from the most recent previous anthropometric record that is at least 3 mo. from the new record.

For Clients greater than two years old, age is calculated from the medical data date of the anthropometric record being entered to the Client's date of birth and then rounding down. For Clients less than two years old, age is calculated from the medical data date of the anthropometric record being entered to the Client's expected delivery date and then rounding down.

The appropriate weight gain is calculated by taking the Ave. Weight Gains from the above tables and accumulating them for each age range defined in the table. The appropriate weight gain is then compared to the actual weight gain, if the actual weight gain is below the appropriate weight gain the system assigns WIC Code 135 to the Client. If two anthropometric measurements do not exist or are not 1 mo. apart (Clients less than 6 mo.) or 3 mo. apart (Clients greater than 6 mo.) then WIC Code 135 will not be assigned.

The following is an example of the calculation: Date of Birth: 01/01/1999

Medical Records:	Medical Date	Weight in Oz.
	01/15/1999	128
	03/20/1999	168
	06/15/1999	224

Actual Weight Gain: 224 - 168 = 56
Actual Weight Gain / day: 56 / 87 days = .64

Expected/Actual Weight Gain from 3/20/99 - 6/01/99 (up to 6 mo. of age)

2 - 3 mo. of age (11 days in this age range):	11 x (4.5 / 7)	= 7.06 oz
3 - 4 mo. of age (30 days):	30 x (4 / 7)	= 17.13 oz
4 - 5 mo. of age (31 days):	31 x (3.5 / 7)	= 15.5 oz
Total Expected Weight gain up to 6 mo. of age:		39.69 oz

Actual Weight Gain up to 6 mo. of age: 72 x .64 = 46.08 oz

Expected/Actual Weight Gain from 6/01/99 - 6/15/99 (up to 12 mo. of age)

6 - 7 mo. of age (15 days):	15 x (2.25/7)	= 4.82 oz
Total Expected Weight gain 6 to 12 mo. of age:		4.82 oz

Actual Weight Gain 6 to 12 mo. of age: 15 x .64 = 9.6 oz

WIC Code 135 is not assigned in this example because the actual weight gain up to the age of 6 mo. (46.08 oz.) exceeds the expected weight gain up to 6 mo. of age (39.69 oz), and the actual weight gain 6 to 12 mo. of age (9.6 oz) also exceeds the expected weight gain 6 to 12 mo. of age (4.82 oz.). If either one of these calculations were below the expected weight gain, then the WIC Code would be assigned.

6.2 Edit a Medical Record

NOTE: The user may only edit records that they have created and on the same day as the record was created. If one of these conditions fails then the user will not be able to update data in the birth data fields, edit existing records in the anthropometric data grid, or edit existing records in the blood work data grid. The user will have to add new medical records with updated medical data dates.

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Edit a Medical Record

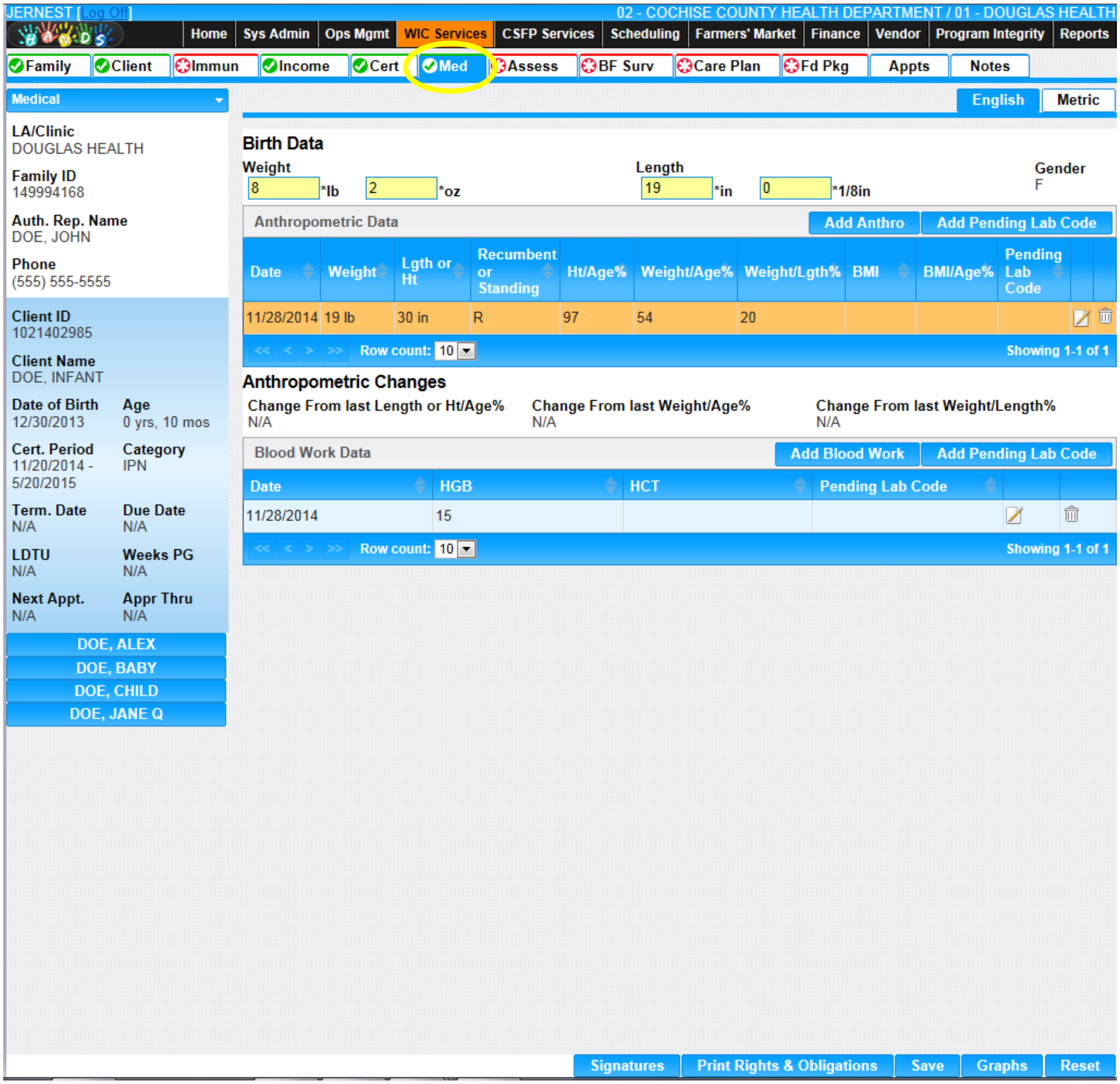


Figure 70: Edit a Medical Record

NOTE: The edit a medical record page is the same as the add a new medical record page.

6.3 Infant/Child Graphs

Narrative:

The purpose of this page is for the user to populate the medical graphs for a Client. The WHO graphs (see the infant/children list below) will be used for infants and children under the age of 2. The system will round ages to the nearest half month. The CDC graphs (see the children list below) will be used for children over the age of 2. The system will round ages to the nearest half month when populating the Length for Age and Weight for Length 24-36 mos. graphs. For the other CDC graphs the system will round ages to the nearest quarter of a year. The types of graphs that can be populated are listed below:

- **Infants/Children:** For infants and children under that age of 2.
    - WHO - Length for Age
    - WHO - Weight for Age
    - WHO - Weight for Length

NOTE: For infants and children under the age of 2 who were born at or before 37 weeks gestation (premature) adjusted age vs actual age will display on each of the graphs listed above. All WIC Code calculations will be based off of the Clients actual age.

- **Children:** For children age 2 and over based on gender.
    - CDC - Length for Age if measured recumbent (24 – 36 mos.)
    - CDC – Weight for Length if measured recumbent (24 – 36 mos.)
    - CDC - Stature for Age if measured standing
    - CDC - Weight for Age >= 24 mos.
    - CDC - BMI for Age (Must be measured standing)

The user will have the ability to zoom into any graph along with the ability to print out a copy of the original graph along with the zoomed in version. The grid lines displayed on the graph will be red for females and blue for male Clients.

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Medical | Graphs

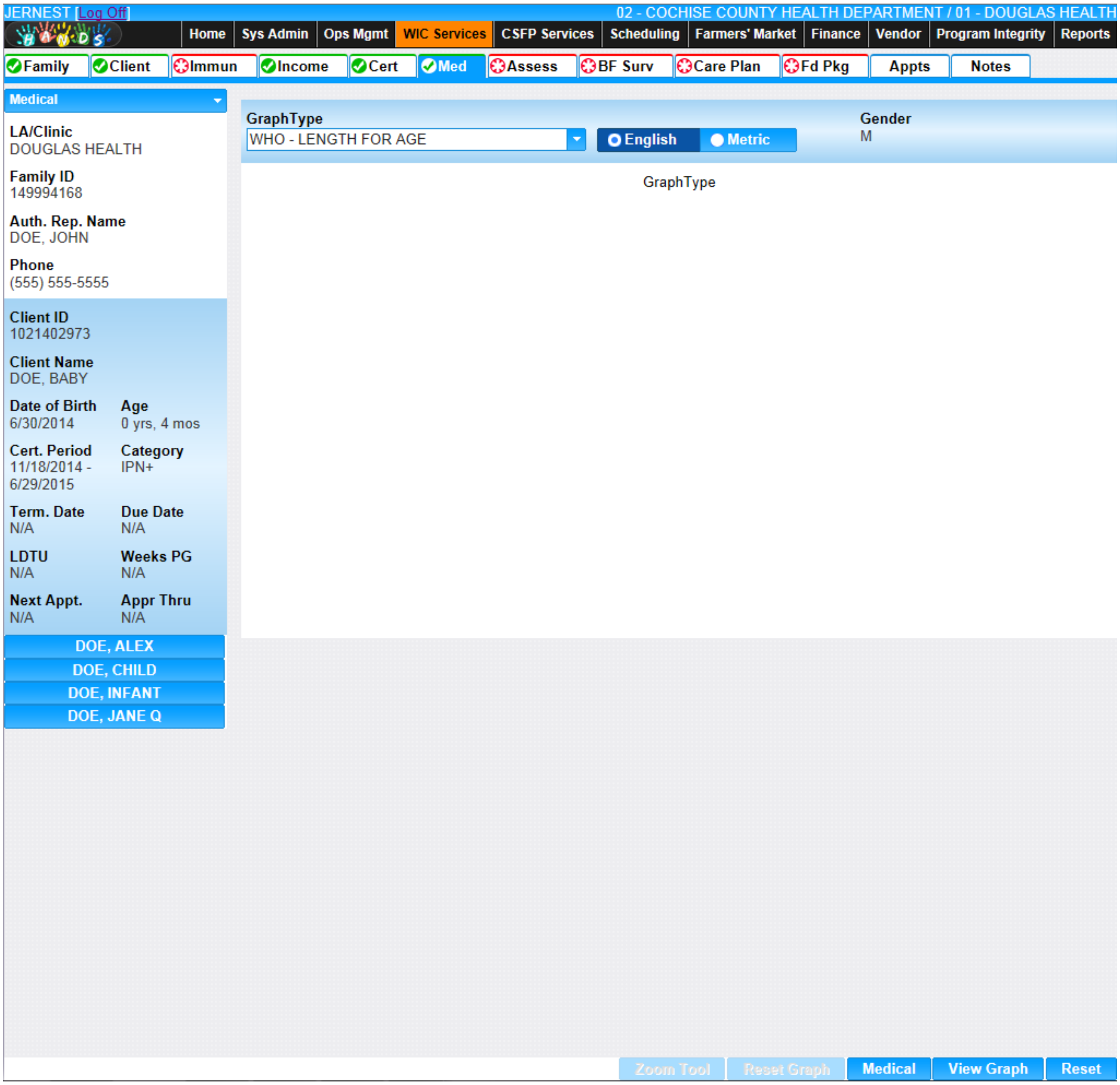


Figure 71: Graphs

Fields:

- **Graph Type –** The type of graph the user wishes to display. This field is mandatory, will default to the WHO – Length for Age graph, and is selected from a drop down list.
- **English/Metric –** Selection options (English or Metric) that determine what units will be used to populate the graph. This field is mandatory and will default to English.
- **Gender –** The gender of the Client. This field is populated based off the gender selection on the Client information page. This field is display only.

Buttons:

- **Zoom Tool –** Press this button to bring up the zoom tool, used for zooming into a specific area of the populated graph. This button will be disabled until a graph is populated.

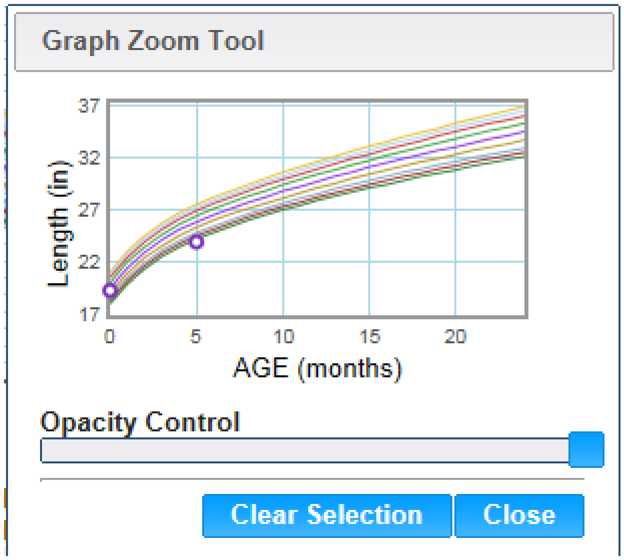


Figure 72: Zoom Tool Modal

Buttons:

- **Opacity Control –** Slider used to determine the opacity of the zoom tool modal. The further the slider is to the left the more see through the zoom tool modal will be.
- **Clear Selection –** Press this button to clear the current selected area and return the graph to its original form.
- **Close –** Press this button to close the zoom tool modal.

- **Reset Graph –** Press this button to reset the graph to its original state. This button will be disabled until a graph is populated.

- **Medical –** Press this button to return to the Medical page.

- **View Graph –** Press this button to populate the page with the current selected graph from the graph type field.

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

6.3.1 WHO – Length for Age

Narrative: A graph used to plot an infant/child's (birth – 23 mos.) length vs age anthropometric data measurements. The key along the right side of the graph represents the percentile lines as defined in the NCHS Data base table for the WHO - Length for Age graph. For more information, see the NCHS Data base table section of this document.

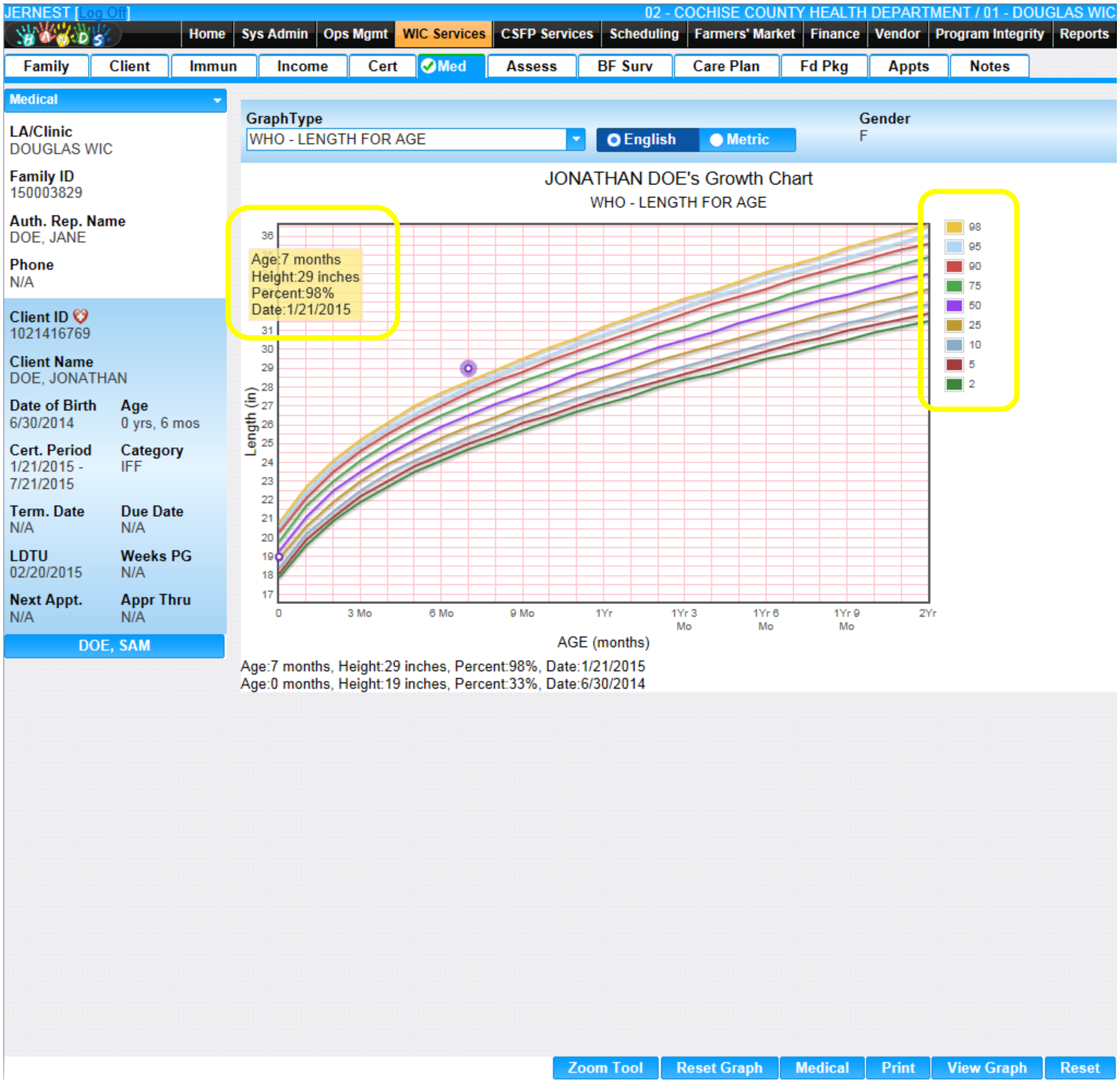


Figure 73: WHO – Length for Age Graph

Fields:

- **Graph Type –** The type of graph being displayed. The user may select another graph to display from the drop down list.
- **English/Metric –** Selection options (English or Metric) that determine what units will be used to populate the graph. This field is mandatory and will default to English.
- **Gender –** The gender of the Client. This field is populated based off the gender selection on the Client information page. This field is display only.

Buttons:

- **Zoom Tool –** Press this button to bring up the zoom tool, used for zooming into a specific area of the populated graph.

- **Reset Graph –** Press this button to reset the graph to its original state. This button will be disabled until a graph is populated.

- **Medical –** Press this button to return to the Medical page.

- **Print –** Press this button to print the exact image displayed in the main graph section. *NOTE: If the graph has been zoomed into then the zoomed in graph will be printed.*

- **View Graph –** Press this button to populate the page with the current selected graph from the graph type field.

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

Calculations:

1) Length/Age is derived from the NCHS Data base table percent field by comparing the age of the Client rounded to the nearest half month to metric meas val 1 and the length entered converted to centimeters with metric meas val 2 where measurement type equals "LGTAGE", classification equals 'STANDARD', data source equals "WHO", and gender equals the gender of the Client. If the exact length is not found in the base table the system selects the nearest next higher length and the nearest next lower length, this results in two percentiles, the system then extrapolates a percentile between the two. The extrapolation of the percentile is accomplished as follows:
   Percentile = [(Measurement – Lower Value) / (Higher Value – Lower Value) * (Higher Percent – Lower Percent)] + Lower Percent
   Measurement = The actual length of the Client.
   Lower Value = The next lower length found in the NCHS Data base table.
   Higher Value = The next higher length found in the NCHS Data base table.
   Lower Percent = The next lower percentile found in the NCHS Data base table.
   Higher Percent = The next higher percentile found in the NCHS Data base table.

2) The age that is used to lookup the NCHS percentile is calculated by using the following formula:
   Round [The number of months between (The medical data date for the data point and the Client's date of birth)]

Background Processes:

1) Using the mouse, the user has the ability to hover over a data point on the graph. When this is performed the medical data box will open displaying specific information about the data point.

Figure 74: Medical Data Box

Fields:

- **Age –** The calculated age at the time of the anthropometric measurement record. This field is display only.
- **Height –** The length or height entered for the anthropometric measurement record. This field is display only.
- **Percent –** The calculated percent of the anthropometric measurement record based on the percentile lines for the graph.
- **Date –** The medical data date for the anthropometric measurement record. This field is display only.

2) If the calculated percent has been associated with a WIC Code the system will automatically assign the WIC Code to the Client whether the user accesses the graph or not. In the case where the exact length was not found in the table and the calculated percentile is less than fifty of the next nearest higher percentile record, then the higher percentile record associated WIC Code(s) will be assigned. If the calculated percentile is greater than fifty of the next nearest lower percentile record, then the lower percentile associated WIC Code(s) will be assigned.

6.3.2 CDC – Length for Age 24 – 36 months

Narrative: A graph used to plot a child's (24 – 36 mos.) length vs age anthropometric data measurements. The key along the right side of the graph represents the percentile lines as defined in the NCHS Data base table for the Length for Age 24 – 36 mos. graph. This graph will only plot data points within the age range that are taken recumbent (R). If no data has been recorded for the Client during this age range and/or the measurement has not been taken recumbently this graph will not display. For more information, see the NCHS Data base table section of this document.

Figure 75: CDC – Length for Age 24 – 36 mos. Graph

Fields:

- **Graph Type –** The type of graph being displayed. The user may select another graph to display from the drop down list.
- **English/Metric –** Selection options (English or Metric) that determine what units will be used to populate the graph. This field is mandatory and will default to English.
- **Gender –** The gender of the Client. This field is populated based off of the gender selection on the Client information page. This field is display only.

Buttons:

- **Zoom Tool –** Press this button to bring up the zoom tool, used for zooming into a specific area of the populated graph.
- **Reset Graph –** Press this button to reset the graph to its original state. This button will be disabled until a graph is populated.
- **Medical –** Press this button to return to the Medical page.
- **Print –** Press this button to print the exact image displayed in the main graph section.

NOTE: If the graph has been zoomed into then the zoomed in graph will be printed.

- **View Graph –** Press this button to populate the page with the current selected graph from the graph type field.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) Length/Age 24 – 36 mos. is derived from the NCHS Data base table percent field by comparing the age of the Client rounded to the nearest half month to metric meas val 1 and the length entered converted to centimeters with metric meas val 2 where measurement type equals "LGTAGE", classification equals 'STANDARD', data source equals "CDC", and gender equals the gender of the Client. If the exact length is not found in the base table the system selects the nearest next higher length and the nearest next lower length, this results in two percentiles, the system then extrapolates a percentile between the two. The extrapolation of the percentile is accomplished as follows:
   Percentile = [(Measurement – Lower Value) / (Higher Value – Lower Value) * (Higher Percent – Lower Percent)] + Lower Percent
   Measurement = The actual length of the Client.
   Lower Value = The next lower length found in the NCHS Data base table.
   Higher Value = The next higher length found in the NCHS Data base table.
   Lower Percent = The next lower percentile found in the NCHS Data base table.
   Higher Percent = The next higher percentile found in the NCHS Data base table.

2) The age that is used to lookup the NCHS percentile is calculated by using the following formula:
   Round [(The number of months between (The medical data date for the data point and the Client's date of birth)]

Background Processes:

1) Using the mouse, the user has the ability to hover over a data point on the graph. When this is performed the medical data box will open displaying specific information about the data point.

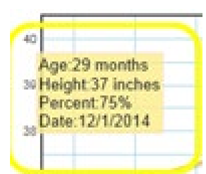


Figure 76: Medical Data Box

Fields:

- **Age –** The calculated age at the time of the anthropometric measurement record. This field is display only.
- **Height –** The length or height entered for the anthropometric measurement record. This field is display only.
- **Percent –** The calculated percent of the anthropometric measurement record based on the percentile lines for the graph.

- **Date –** The medical data date for the anthropometric measurement record. This field is display only.

2) If the calculated percent has been associated with a WIC Code the system will automatically assign the WIC Code to the Client whether the user accesses the graph or not. In the case where the exact length was not found in the table and the calculated percentile is less than fifty of the next nearest higher percentile record, then the higher percentile record associated WIC Code(s) will be assigned. If the calculated percentile is greater than fifty of the next nearest lower percentile record, then the lower percentile associated WIC Code(s) will be assigned.

6.3.3 WHO – Weight for Age

Narrative: A graph used to plot an infant/child's (birth – 23 mos.) weight vs age anthropometric data measurements. The key along the right side of the graph represents the percentile lines as defined in the NCHS Data base table for the WHO - Weight for Age 24 – 36 mos. graph. For more information, see the NCHS Data base table section of this document.

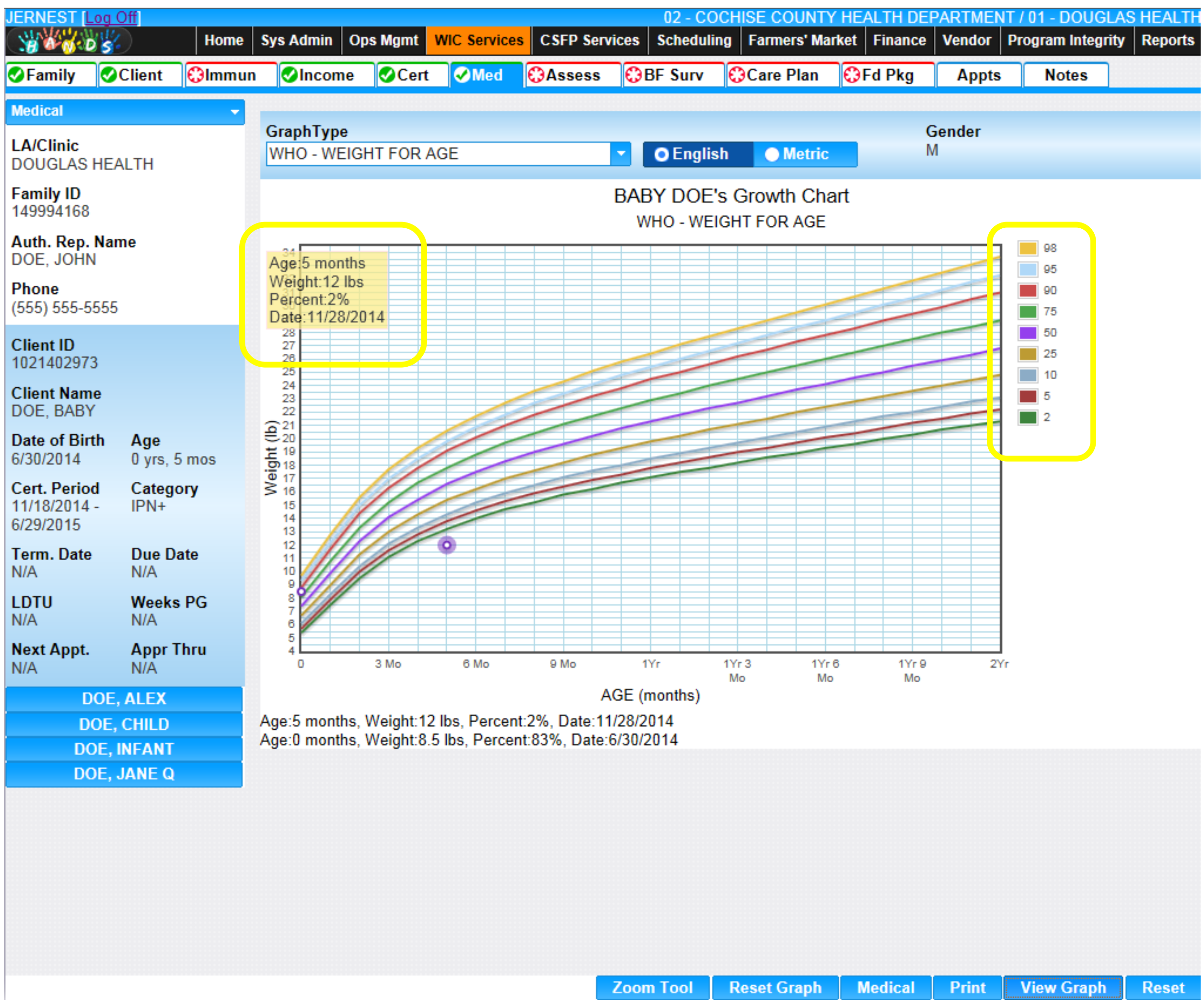


Figure 77: WHO – Weight for Age Graph

Fields:

- **Graph Type –** The type of graph being displayed. The user may select another graph to display from the drop down list.
- **English/Metric –** Selection options (English or Metric) that determine what units will be used to populate the graph. This field is mandatory and will default to English.
- **Gender –** The gender of the Client. This field is populated based off the gender selection on the Client information page. This field is display only.

Buttons:

- **Zoom Tool –** Press this button to bring up the zoom tool, used for zooming into a specific area of the populated graph.
- **Reset Graph –** Press this button to reset the graph to its original state. This button will be disabled until a graph is populated.
- **Medical –** Press this button to return to the Medical page.
- **Print –** Press this button to print the exact image displayed in the main graph section. *NOTE: If the graph has been zoomed into then the zoomed in graph will be printed.*
- **View Graph –** Press this button to populate the page with the current selected graph from the graph type field.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) Weight/Age is derived from the NCHS Data base table percent field by comparing the age of the Client rounded to the nearest half month to metric meas val 1 and the weight entered converted to grams with metric meas val 2 where measurement type equals “WGTAGE”, classification equals ‘STANDARD’, data source equals “WHO”, and gender equals the gender of the Client. If the exact weight is not found in the base table the system selects the nearest next higher weight and the nearest next lower weight, this results in two percentiles, the system then extrapolates a percentile between the two. The extrapolation of the percentile is accomplished as follows:

   Percentile = [(Measurement – Lower Value) / (Higher Value – Lower Value) * (Higher Percent – Lower Percent)] + Lower Percent
   Measurement = The actual weight of the Client.
   Lower Value = The next lower weight found in the NCHS Data base table.
   Higher Value = The next higher weight found in the NCHS Data base table.
   Lower Percent = The next lower percentile found in the NCHS Data base table.
   Higher Percent = The next higher percentile found in the NCHS Data base table

2) The age that is used to lookup the NCHS percentile is calculated by using the following formula:

   Round [(The number of months between (The medical data date for the data point and the Client’s date of birth)]

Background Processes:

1) Using the mouse, the user has the ability to hover over a data point on the graph. When this is performed the medical data box will open displaying specific information about the data point.

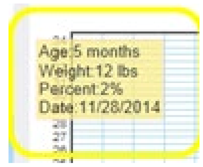


Figure 78: Medical Data Box

Fields:

- **Age –** The calculated age at the time of the anthropometric measurement record. This field is display only.
- **Weight –** The weight entered for the anthropometric measurement record. This field is display only.
- **Percent –** The calculated percent of the anthropometric measurement record based on the percentile lines for the graph.
- **Date –** The medical data date for the anthropometric measurement record. This field is display only.

2) If the calculated percent has been associated with a WIC Code the system will automatically assign the WIC Code to the Client whether the user accesses the graph or not. In the case where the exact length was not found in the table and the calculated percentile is less than fifty of the next nearest higher percentile record, then the higher percentile record associated WIC Code(s) will be assigned. If the calculated percentile is greater than fifty of the next nearest lower percentile record, then the lower percentile associated WIC Code(s) will be assigned.

6.3.4 CDC – Weight for Age >= 24 months

Narrative:

A graph used to plot a child's (age >= 24 mos.) weight vs age anthropometric data measurements. The key along the right side of the graph represents the percentile lines as defined in the NCHS Data base table for the CDC - Weight for Age graph. For more information, see the NCHS Data base table section of this document.

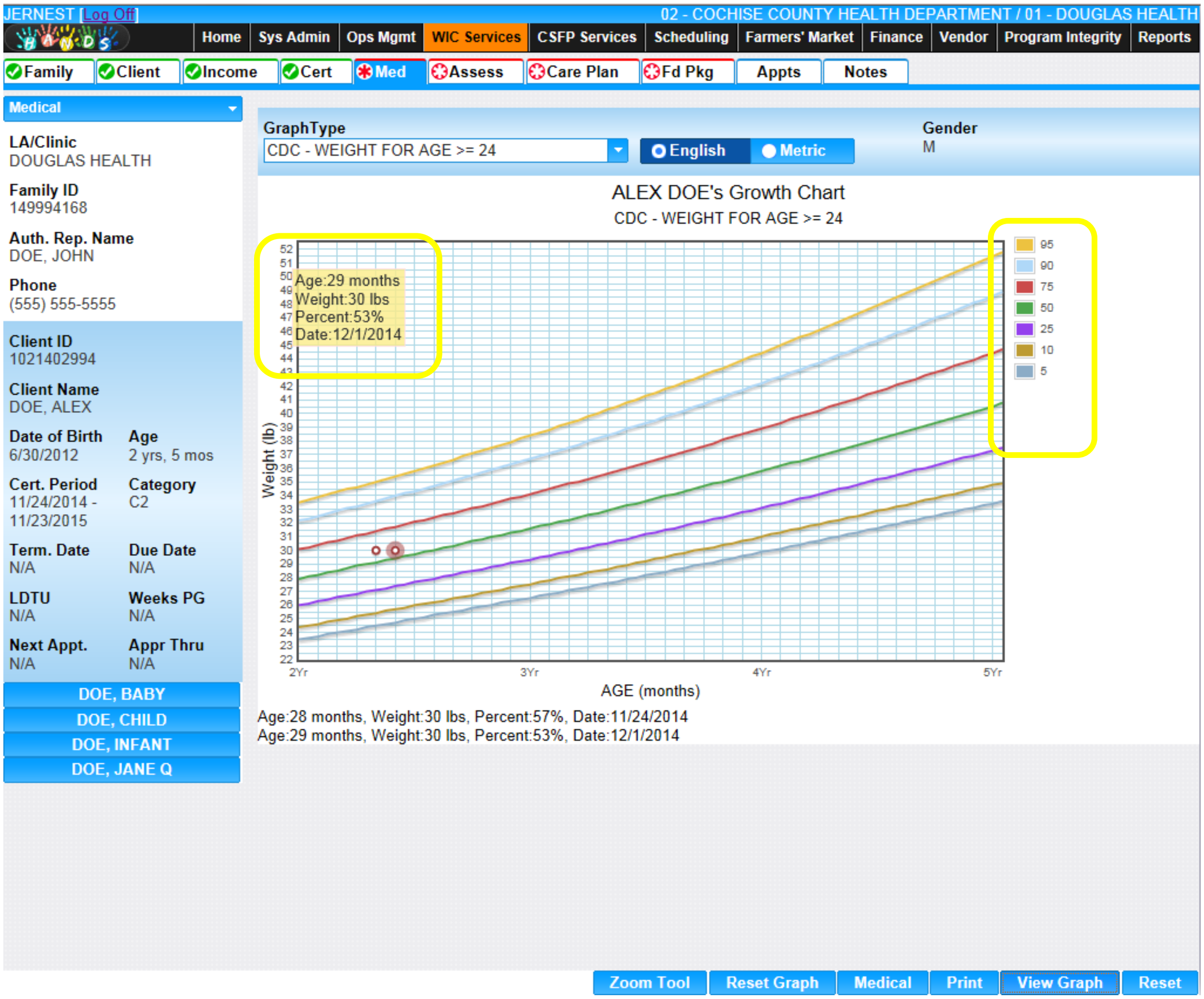


Figure 79: CDC – Weight for Age >= 24 mos. Graph

Fields:

- **Graph Type** – The type of graph being displayed. The user may select another graph to display from the drop down list.
- **English/Metric** – Selection options (English or Metric) that determine what units will be used to populate the graph. This field is mandatory and will default to English.
- **Gender** – The gender of the Client. This field is populated based off the gender selection on the Client information page. This field is display only.

Buttons:

- **Zoom Tool** – Press this button to bring up the zoom tool, used for zooming into a specific area of the populated graph.
- **Reset Graph** – Press this button to reset the graph to its original state. This button will be disabled until a graph is populated.
- **Medical** – Press this button to return to the Medical page.
- **Print** – Press this button to print the exact image displayed in the main graph section.

NOTE: If the graph has been zoomed into then the zoomed in graph will be printed.

- **View Graph –** Press this button to populate the page with the current selected graph from the graph type field.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) Weight/Age is derived from the NCHS Data base table percent field by comparing the age of the Client rounded to the nearest half month to metric meas val 1 and the weight entered converted to grams with metric meas val 2 where measurement type equals "WGTAGE", classification equals 'STANDARD', data source equals "CDC", and gender equals the gender of the Client. If the exact weight is not found in the base table the system selects the nearest next higher weight and the nearest next lower weight, this results in two percentiles, the system then extrapolates a percentile between the two. The extrapolation of the percentile is accomplished as follows:

   Percentile = [(Measurement – Lower Value) / (Higher Value – Lower Value) * (Higher Percent – Lower Percent)] + Lower Percent
   Measurement = The actual weight of the Client.
   Lower Value = The next lower weight found in the NCHS Data base table.
   Higher Value = The next higher weight found in the NCHS Data base table.
   Lower Percent = The next lower percentile found in the NCHS Data base table.
   Higher Percent = The next higher percentile found in the NCHS Data base table.

2) The age that is used to lookup the NCHS percentile is calculated by using the following formula:

   Round [(The number of months between (The medical data date for the data point and the Client's date of birth)]

Background Processes:

1) Using the mouse, the user has the ability to hover over a data point on the graph. When this is performed the medical data box will open displaying specific information about the data point.

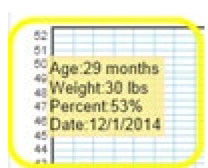


Figure 80: Medical Data Box

Fields:

- **Age –** The calculated age at the time of the anthropometric measurement record. This field is display only.
- **Weight –** The weight entered for the anthropometric measurement record. This field is display only.
- **Percent –** The calculated percent of the anthropometric measurement record based on the percentile lines for the graph.

- **Date** – The medical data date for the anthropometric measurement record. This field is display only.

2) If the calculated percent has been associated with a WIC Code the system will automatically assign the WIC Code to the Client whether the user accesses the graph or not. In the case where the exact length was not found in the table and the calculated percentile is less than fifty of the next nearest higher percentile record, then the higher percentile record associated WIC Code(s) will be assigned. If the calculated percentile is greater than fifty of the next nearest lower percentile record, then the lower percentile associated WIC Code(s) will be assigned.

6.3.5 WHO – Weight for Length

Narrative:
A graph used to plot an infant/child's (birth - 23 mos.) weight vs length anthropometric data measurements. The key along the right side of the graph represents the percentile lines as defined in the NCHS Data base table for the WHO - Weight for Length graph. For more information, see the NCHS Data base table section of this document.

Figure 81: WHO – Weight for Length Graph

Fields:

- **Graph Type –** The type of graph being displayed. The user may select another graph to display from the drop down list.
- **English/Metric –** Selection options (English or Metric) that determine what units will be used to populate the graph. This field is mandatory and will default to English.
- **Gender –** The gender of the Client. This field is populated based off of the gender selection on the Client information page. This field is display only.

Buttons:

- **Zoom Tool –** Press this button to bring up the zoom tool, used for zooming into a specific area of the populated graph.
- **Reset Graph –** Press this button to reset the graph to its original state. This button will be disabled until a graph is populated.
- **Medical –** Press this button to return to the Medical page.
- **Print –** Press this button to print the exact image displayed in the main graph section. *NOTE: If the graph has been zoomed into then the zoomed in graph will be printed.*
- **View Graph –** Press this button to populate the page with the current selected graph from the graph type field.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) Weight/Length is derived from the NCHS Data base table percent field by comparing the weight entered of the client converted to grams to metric meas val 2 and the length entered converted to centimeters and rounded to the nearest centimeter with metric meas val 1 where measurement type equals “WGTLGT”, classification equals ‘STANDARD’, data source equals “WHO”, and gender equals the gender of the Client. If the exact weight is not found in the base table the system selects the nearest next higher weight and the nearest next lower weight, this results in two percentiles, the system then extrapolates a percentile between the two. The extrapolation of the percentile is accomplished as follows:

    Percentile = [(Measurement – Lower Value) / (Higher Value – Lower Value) * (Higher Percent – Lower Percent)] + Lower Percent
    Measurement = The actual weight of the Client.
    Lower Value = The next lower weight found in the NCHS Data base table.
    Higher Value = The next higher weight found in the NCHS Data base table.
    Lower Percent = The next lower percentile found in the NCHS Data base table.
    Higher Percent = The next higher percentile found in the NCHS Data base table.

2) The age that is used to lookup the NCHS percentile is calculated by using the following formula:

    Round [(The number of months between (The medical data date for the data point and the Client’s date of birth)]

Background Processes:

1) Using the mouse, the user has the ability to hover over a data point on the graph. When this is performed the medical data box will open displaying specific information about the data point.

Figure 82: Medical Data Box

Fields:

- **Length –** The length entered for the anthropometric measurement record. This field is display only.
- **Weight –** The weight entered for the anthropometric measurement record. This field is display only.
- **Percent –** The calculated percent of the anthropometric measurement record based on the percentile lines for the graph.
- **Date –** The medical data date for the anthropometric measurement record. This field is display only.

2) If the calculated percent has been associated with a WIC Code the system will automatically assign the WIC Code to the Client whether the user accesses the graph or not. In the case where the exact length was not found in the table and the calculated percentile is less than fifty of the next nearest higher percentile record, then the higher percentile record associated WIC Code(s) will be assigned. If the calculated percentile is greater than fifty of the next nearest lower percentile record, then the lower percentile associated WIC Code(s) will be assigned.

6.3.6 CDC – Weight for Length 24 – 36 months

Narrative: A graph used to plot a child’s (24 - 36 mos.) weight vs length anthropometric data measurements. The key along the right side of the graph represents the percentile lines as defined in the NCHS Data base table for the CDC - Weight for Length 24 – 36 mos. graph. This graph will only plot data points within the age range that are taken recumbent (R). If no data has been recorded for the Client during this age range and/or the measurement has not been taken recumbently this graph will not display. For more information, see the NCHS Data base table section of this document.

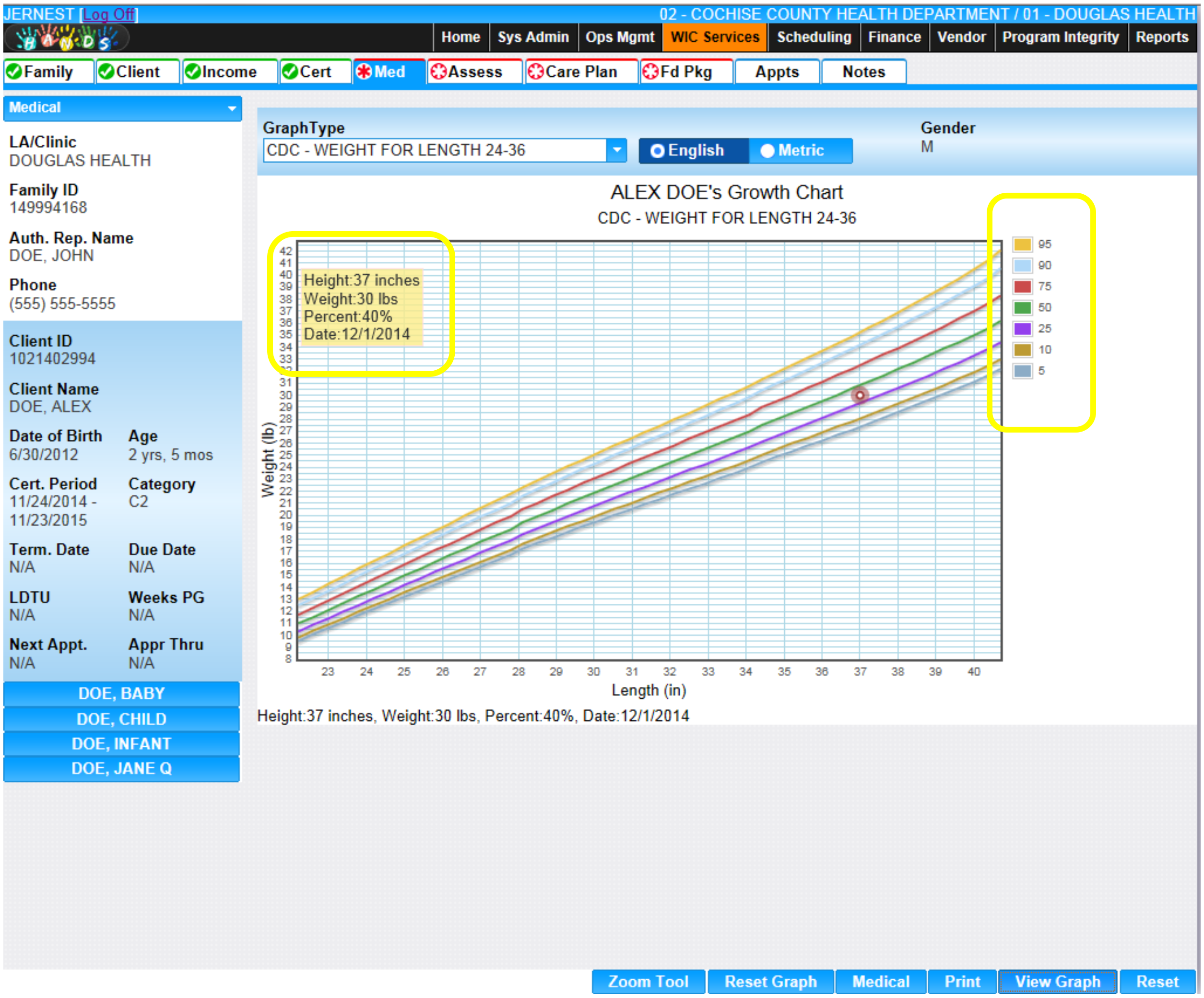


Figure 83: CDC – Weight for Length 24 – 36 mos. Graph

Fields:

- **Graph Type –** The type of graph being displayed. The user may select another graph to display from the drop down list.
- **English/Metric –** Selection options (English or Metric) that determine what units will be used to populate the graph. This field is mandatory and will default to English.
- **Gender –** The gender of the Client. This field is populated based off of the gender selection on the Client information page. This field is display only.

Buttons:

- **Zoom Tool –** Press this button to bring up the zoom tool, used for zooming into a specific area of the populated graph.
- **Reset Graph –** Press this button to reset the graph to its original state. This button will be disabled until a graph is populated.
- **Medical –** Press this button to return to the Medical page.
- **Print –** Press this button to print the exact image displayed in the main graph section.

NOTE: If the graph has been zoomed into then the zoomed in graph will be printed.

- **View Graph –** Press this button to populate the page with the current selected graph from the graph type field.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) Weight/Length is derived from the NCHS Data base table percent field by comparing the weight entered of the client converted to grams to metric meas val 2 and the length entered converted to centimeters and rounded to the nearest centimeter with metric meas val 1 where measurement type equals “WGTLGT”, classification equals ‘STANDARD’, data source equals “CDC”, and gender equals the gender of the Client. If the exact weight is not found in the base table the system selects the nearest next higher weight and the nearest next lower weight, this results in two percentiles, the system then extrapolates a percentile between the two. The extrapolation of the percentile is accomplished as follows:

    Percentile = [(Measurement – Lower Value) / (Higher Value – Lower Value) * (Higher Percent – Lower Percent)] + Lower Percent
    Measurement = The actual weight of the Client.
    Lower Value = The next lower weight found in the NCHS Data base table.
    Higher Value = The next higher weight found in the NCHS Data base table.
    Lower Percent = The next lower percentile found in the NCHS Data base table.
    Higher Percent = The next higher percentile found in the NCHS Data base table.

2) The age that is used to lookup the NCHS percentile is calculated by using the following formula:

    Round [(The number of months between (The medical data date for the data point and the Client’s date of birth)]

Background Processes:

1) Using the mouse the user has the ability to hover over a data point on the graph. When this is performed the medical data box will open displaying specific information about the data point.

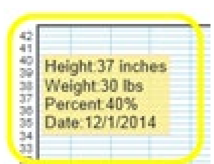


Figure 84: Medical Data Box

Fields:

- **Height –** The length entered for the anthropometric measurement record. This field is display only.
- **Weight –** The weight entered for the anthropometric measurement record. This field is display only.
- **Percent –** The calculated percent of the anthropometric measurement record based on the percentile lines for the graph.

- **Date –** The medical data date for the anthropometric measurement record. This field is display only.

2) If the calculated percent has been associated with a WIC Code the system will automatically assign the WIC Code to the Client whether the user accesses the graph or not. In the case where the exact length was not found in the table and the calculated percentile is less than fifty of the next nearest higher percentile record, then the higher percentile record associated WIC Code(s) will be assigned. If the calculated percentile is greater than fifty of the next nearest lower percentile record, then the lower percentile associated WIC Code(s) will be assigned.

6.3.7 CDC – Stature for Age

Narrative:
A graph used to plot a child's (>= 24 mos.) stature (height) vs age anthropometric data measurements. The key along the right side of the graph represents the percentile lines as defined in the NCHS Data base table for the CDC - Stature for Age graph. This graph will only plot data points within the age range that are taken standing (S). If no data has been recorded for the Client during this age range and/or the measurement has not been taken standing this graph will not display. For more information, see the NCHS Data base table section of this document.

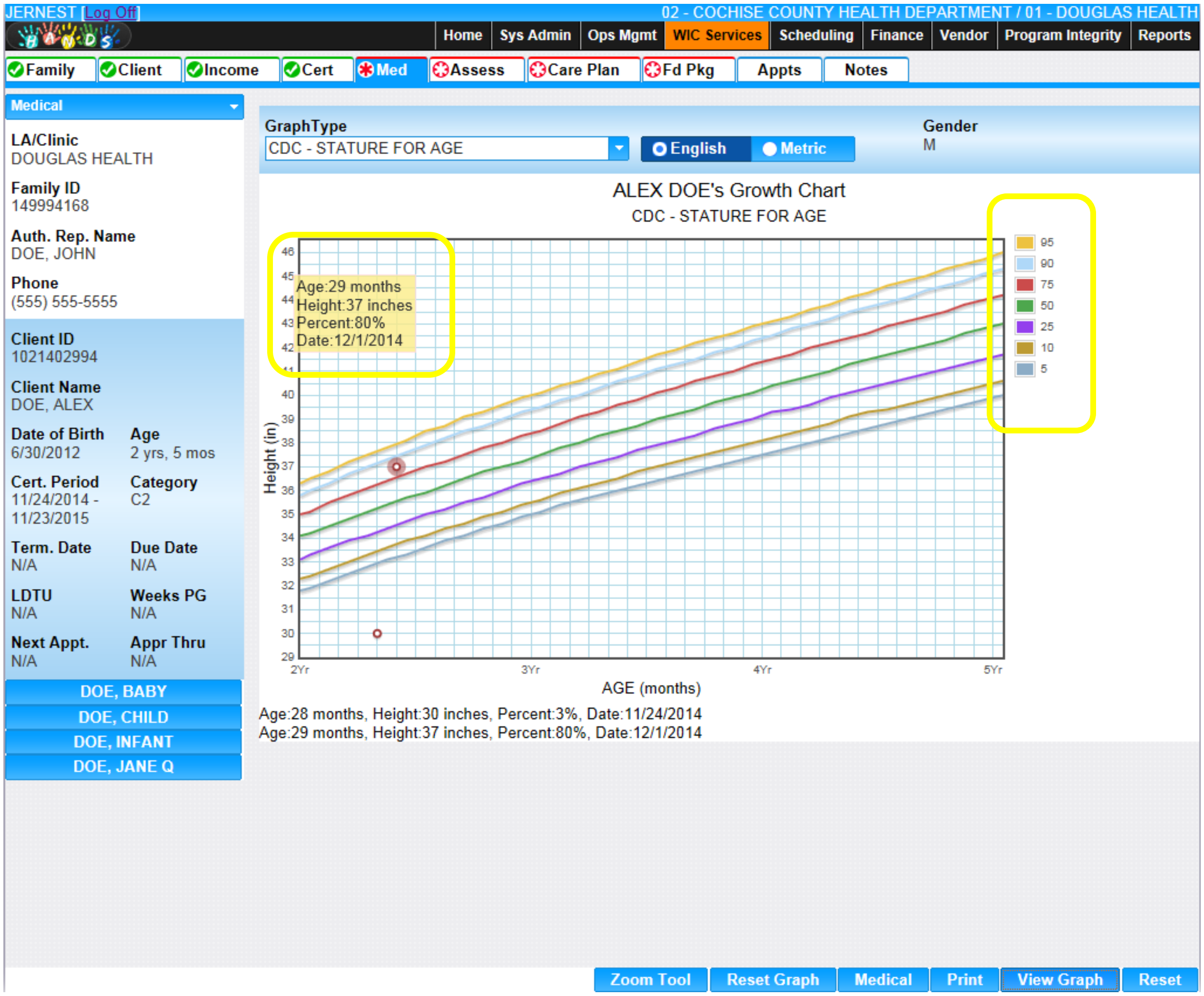


Figure 85: CDC – Stature for Height Graph

Fields:

- **Graph Type –** The type of graph being displayed. The user may select another graph to display from the drop down list.
- **English/Metric –** Selection options (English or Metric) that determine what units will be used to populate the graph. This field is mandatory and will default to English.
- **Gender –** The gender of the Client. This field is populated based off the gender selection on the Client information page. This field is display only.

Buttons:

- **Zoom Tool –** Press this button to bring up the zoom tool, used for zooming into a specific area of the populated graph.
- **Reset Graph –** Press this button to reset the graph to its original state. This button will be disabled until a graph is populated.
- **Medical –** Press this button to return to the Medical page.
- **Print –** Press this button to print the exact image displayed in the main graph section.

NOTE: If the graph has been zoomed into then the zoomed in graph will be printed.

- **View Graph –** Press this button to populate the page with the current selected graph from the graph type field.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) Stature/Age is derived from the NCHS Data base table percent field by comparing the age of the Client rounded to the nearest quarter year to metric meas val 1 and the height entered converted to centimeters with metric meas val 2 where measurement type equals “STAAGE”, classification equals ‘STANDARD’, data source equals “CDC”, and gender equals the gender of the Client. If the exact height is not found in the base table the system selects the nearest next higher height and the nearest next lower height, this results in two percentiles, the system then extrapolates a percentile between the two. The extrapolation of the percentile is accomplished as follows:

   Percentile = [(Measurement – Lower Value) / (Higher Value – Lower Value) * (Higher Percent – Lower Percent)] + Lower Percent
   Measurement = The actual height of the Client.
   Lower Value = The next lower height found in the NCHS Data base table.
   Higher Value = The next higher height found in the NCHS Data base table.
   Lower Percent = The next lower percentile found in the NCHS Data base table.
   Higher Percent = The next higher percentile found in the NCHS Data base table.

2) The age that is used to lookup the NCHS percentile is calculated by using the following formula:

   Round [(The number of months between (The medical data date for the data point and the Client’s date of birth)]

Background Processes:

1) Using the mouse, the user has the ability to hover over a data point on the graph. When this is performed the medical data box will open displaying specific information about the data point.

Figure 86: Medical Data Box

Fields:

- **Height –** The length entered for the anthropometric measurement record. This field is display only.
- **Weight –** The weight entered for the anthropometric measurement record. This field is display only.
- **Percent –** The calculated percent of the anthropometric measurement record based on the percentile lines for the graph.

- **Date –** The medical data date for the anthropometric measurement record. This field is display only.

2) If the calculated percent has been associated with a WIC Code the system will automatically assign the WIC Code to the Client whether the user accesses the graph or not. In the case where the exact length was not found in the table and the calculated percentile is less than fifty of the next nearest higher percentile record, then the higher percentile record associated WIC Code(s) will be assigned. If the calculated percentile is greater than fifty of the next nearest lower percentile record, then the lower percentile associated WIC Code(s) will be assigned.

6.3.8 CDC – BMI for Age

Narrative:
A graph used to plot a child's (>= 24 mos.) calculated (calculations one and two) BMI vs age anthropometric data measurements. The key along the right side of the graph represents the percentile lines as defined in the NCHS Data base table for the CDC - BMI for Age graph. This graph will only plot data points within the age range that are taken standing (S). If no data has been recorded for the Client during this age range and/or the measurement has not been taken standing this graph will not display. For more information, see the NCHS Data base table section of this document.

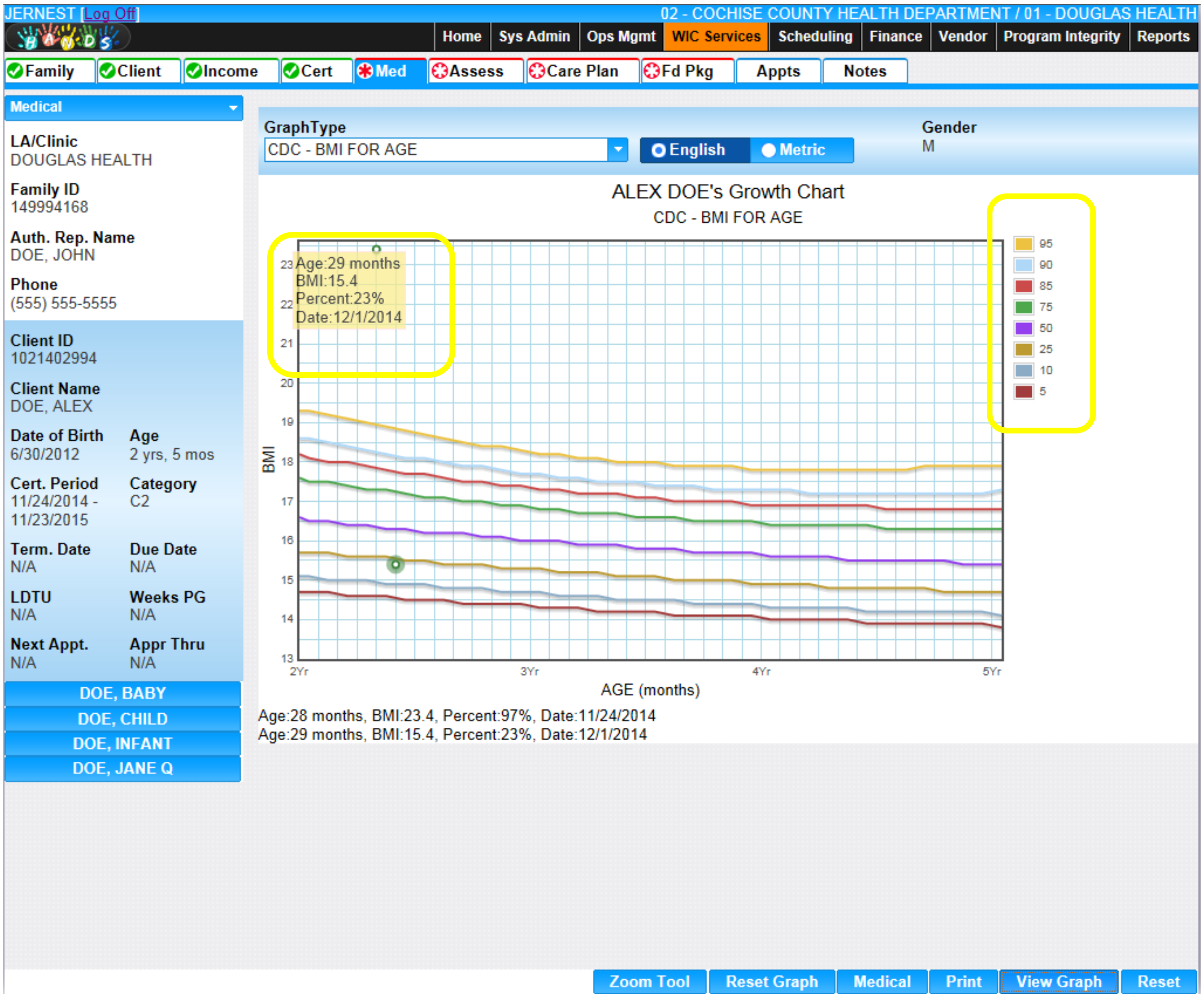


Figure 87: CDC – BMI for Age Graph

Fields:

- **Graph Type** – The type of graph being displayed. The user may select another graph to display from the drop down list.
- **English/Metric** – Selection options (English or Metric) that determine what units will be used to populate the graph. This field is mandatory and will default to English.
- **Gender** – The gender of the Client. This field is populated based off of the gender selection on the Client information page. This field is display only.

Buttons:

- **Zoom Tool** – Press this button to bring up the zoom tool, used for zooming into a specific area of the populated graph.
- **Reset Graph** – Press this button to reset the graph to its original state. This button will be disabled until a graph is populated.
- **Medical** – Press this button to return to the Medical page.
- **Print** – Press this button to print the exact image displayed in the main graph section.

NOTE: If the graph has been zoomed into then the zoomed in graph will be printed.

- **View Graph –** Press this button to populate the page with the current selected graph from the graph type field.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) BMI English Formula: BMI = [Weight in pounds / Height in inches / Height in inches] x 703
2) BMI Metric Formula: BMI = [Weight in kilograms / Height in cm / Height in cm] x 10,000
3) BMI/Age is derived from the NCHS Data base table percent field by comparing the age of the Client rounded to the nearest quarter year to metric meas val 1 and the height entered converted to centimeters with metric meas val 2 where measurement type equals "BMIAGE", classification equals 'STANDARD', data source equals "CDC", and gender equals the gender of the Client. If the exact BMI is not found in the base table the system selects the nearest next higher BMI and the nearest next lower BMI, this results in two percentiles, the system then extrapolates a percentile between the two. The extrapolation of the percentile is accomplished as follows:

   Percentile = [(Measurement – Lower Value) / (Higher Value – Lower Value) * (Higher Percent – Lower Percent)] + Lower Percent

   Measurement = The actual height of the Client.

   Lower Value = The next lower BMI found in the NCHS Data base table.

   Higher Value = The next higher BMI found in the NCHS Data base table.

   Lower Percent = The next lower percentile found in the NCHS Data base table.

   Higher Percent = The next higher percentile found in the NCHS Data base table.
4) The age that is used to lookup the NCHS percentile is calculated by using the following formula:

   Round [(The number of months between (The medical data date for the data point and the Client's date of birth)]

Background Processes:

1) Using the mouse, the user has the ability to hover over a data point on the graph. When this is performed the medical data box will open displaying specific information about the data point.

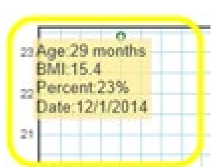


Figure 88: Medical Data Box

Fields:

- **BMI –** The calculated BMI of the anthropometric measurement record. This field is display only.
- **Percent –** The calculated percent of the anthropometric measurement record based on the percentile lines for the graph.
- **Date –** The medical data date for the anthropometric measurement record. This field is display only.

2) If the calculated percent has been associated with a WIC Code the system will automatically assign the WIC Code to the Client whether or not the user accesses the graph. In the case where the exact length was not found in the table and the calculated percentile is less than fifty of the next nearest higher percentile record, then the higher percentile record associated WIC Code(s) will be assigned. If the calculated percentile is greater than fifty of the next nearest lower percentile record, then the lower percentile associated WIC Code(s) will be assigned.

7 WOMEN MEDICAL PAGE

Narrative:
The purpose of these pages is to record/view anthropometric measurements and blood work data for woman. The Client's entire history of medical data is displayed. The anthropometric measurements are displayed by default in English but can change and display in Metric units. The user can enter the measurements in either English or Metric units. The system calculates and displays weeks gestation, weight gained/lost during the pregnancy, weight gained/lost since last recorded the average weight gained/lost per week of pregnancy, and the pre-pregnancy Body Mass Index. Pregnancy weight gain/lost is available on Normal/Underweight/Overweight/Obese graphs. WIC Codes are assigned for the Client's current weight and for inadequate weight gain during the pregnancy. Anemia WIC Codes are assigned based on the Client's blood work entries.

7.1 Add a New Medical Record

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Add a New Medical Record

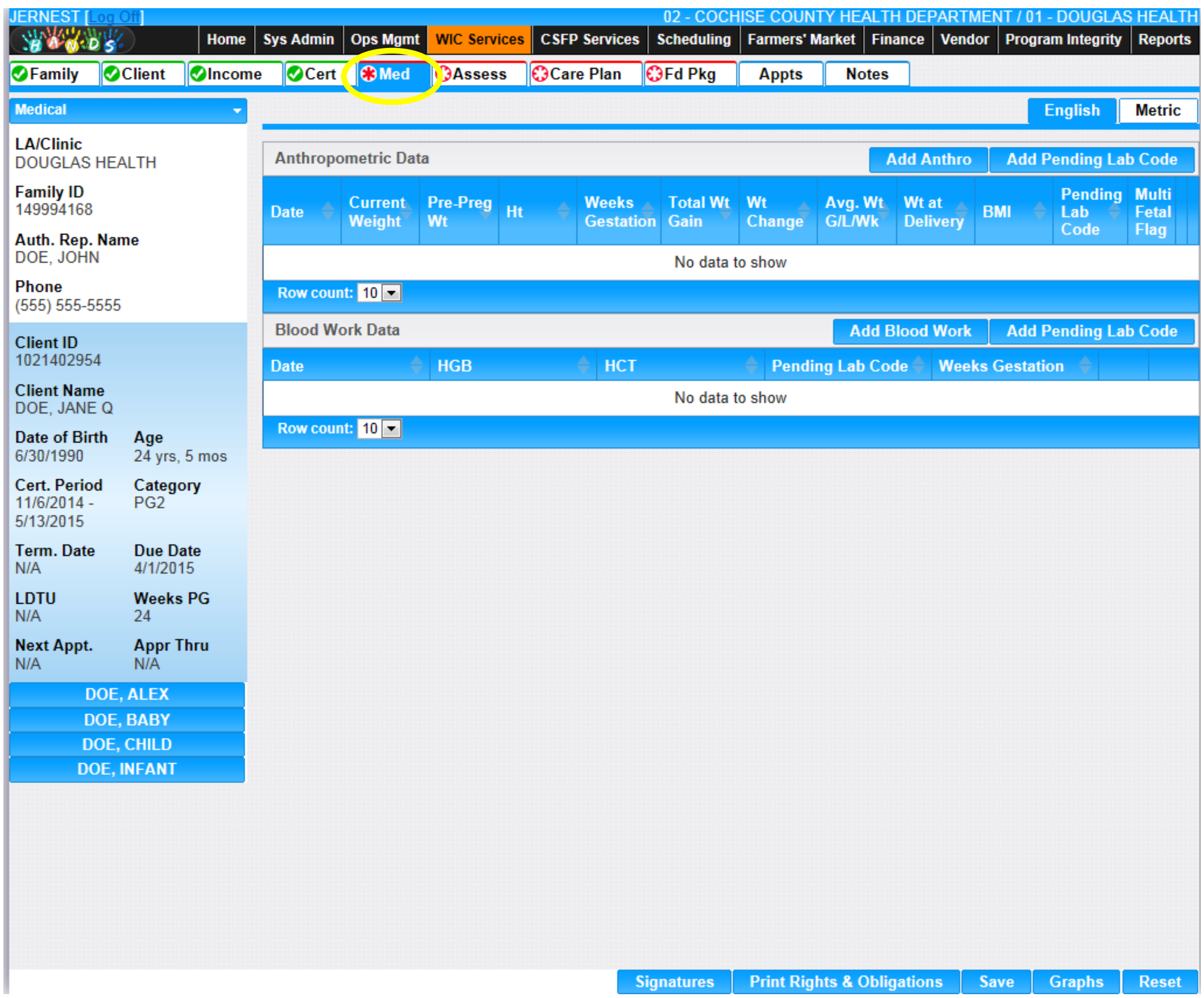


Figure 89: Add a New Medical Record

NOTE: The user can switch the display from English to Metric by clicking the English or Metric tabs.

For more information on English to Metric conversions, see calculations one thru four.

- **Anthropometric Data Grid:** A grid used to display saved anthropometric data records for the Client. Records in this grid will be disabled if today's date is not the date in which the record was created, or the page is not being used by the user that originally created them.
  - **Date –** The date that the anthropometric measurement was taken. This field is display only.
  - **Current Weight –** The current weight of the Client. This field is display only.
  - **Pre-Preg Wt –** The pre pregnancy weight of the Client. This field is display only.
  - **Ht –** The height of the Client. This field is display only.
  - **Weeks Gestation –** The number of weeks pregnant for the Client. This field is display only and will only populate with data if the Client is of a pregnant category. For more information, see calculation number five.
  - **Total Wt Gain –** The amount of weight gained in ounces of the Client. This field is display only and will not populate with any data if the Pre-Preg Wt field contains no data.
  - **Wt Change –** The weight change between the current anthropometric measurement record and the previous. This field is display only and will not populate with any data if a previous record does not exist.
  - **Avg. Wt G/L/Wk –** The average weight gain or loss of the Client. This field is display only. For more information, see calculation number six.
  - **Wt at Delivery –** The weight of the Client at delivery. This field is display only and will not populate with any data if the Client is of a pregnant category.
  - **BMI –** The calculated BMI for the Client. This field is display only. For more information, see calculations number seven and eight.
  - **Pending Lab Codes –** The pending lab code selected for the Client. This field is display only. For more information, see the add a pending lab code button.
  - **Multi Fetal Flag –** A checkbox to determine if the Client is pregnant with multiples.
- **Blood Work Data Grid:** A grid used to record blood work data for the Client. Records in this grid will be disabled if today's date is not the date in which the record was created, or the page is not being used by the user that originally created them.
  - **Date –** The date that the blood work data record was taken. This field is display only.
  - **HGB** – Hemoglobin levels. This field is display only.
  - **HCT** – Hematocrit levels. This field is display only.
  - **Pending Lab Code** – The pending lab code selected for the Client. This field is display only. For more information, see the add a pending lab code button.

  NOTE: A Client must have at least one blood work data grid record in order for checks to be issued. For each subsequent certification, a blood work data record must exist with a date that is within 90 days of the new certification start date.

Buttons:

- **Add Anthro** – Press this button to display the add modal and add records to the anthropometric data grid.

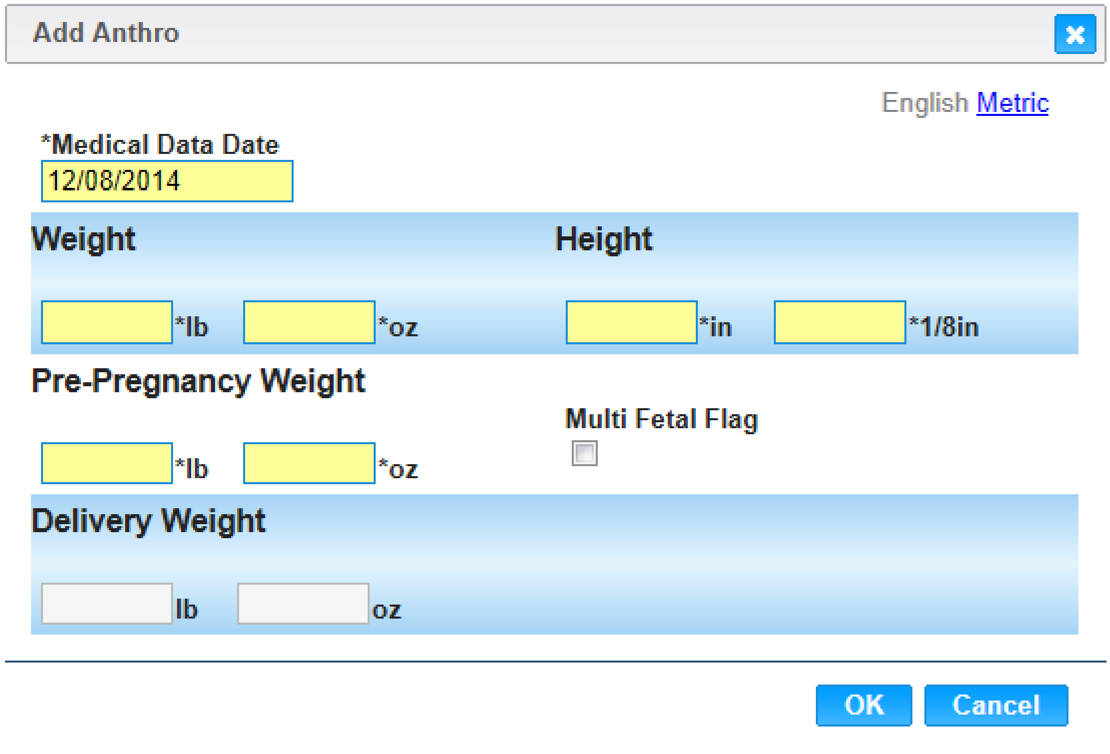


Figure 90: Add Anthro Modal

Fields (Add Anthro Modal):

- **Medical Data Date** – The date that the anthropometric measurement was taken. This field is mandatory and defaults to today's date. The date entered cannot be in the future or more than 60 days in the past.
- **Weight:** The entered weight is validated against the low range and high range values for the field as setup by the State Agency in the ranges base table. For more information, see the ranges base table.
  - **lb** – The weight of the Client in pounds. This field is mandatory.
  - **oz** – The weight of the Client in ounces. This field is mandatory and only accepts integers from between 0-15.
- **Pre Preg Weight:** The entered pre pregnancy weight is validated against the low weight and high weight values for the field as setup by the State Agency in the ranges base table. For more information, see the ranges base table.
  - **lb** – The weight of the Client in pounds. This field is mandatory.
  - **oz** – The weight of the Client in ounces. This field is mandatory and only accepts integers from between 0-15.
- **Delivery Weight:** The entered delivery weight is validated against the low range and high range values for the delivery weight as setup by the State

Agency in the ranges base table. For more information, see the ranges base table.

- **lb** – The weight of the Client in pounds. This field is mandatory.
- **oz** – The weight of the Client in ounces. This field is mandatory and only accepts integers from between 0-15.

NOTE: The delivery weight fields will be disabled if the Client is of a pregnant category.

- **Height:** The entered height is validated against the low range and high range values for the height as setup by the State Agency in the ranges base table. For more information, see the ranges base table.
  - **in** – The height of the Client in inches. This field is mandatory.
  - **1/8in** – The height of the Client in eighths of an inch. This field is mandatory and only accepts integers from 0-7.

NOTE: The calculated BMI based on height and weight is validated against the low range and high range values for the BMI as setup by the State Agency in the ranges base table. For more information, see the ranges base table.

- **Multi Fetal Flag** – A checkbox to determine if the Client is pregnant with multiples. If the checkbox is checked then the Client is considered to have multiples and WIC Code 335 will be assigned. If the checkbox is unchecked, then the Client is considered to not have multiples and WIC Code 335 will not be assigned.

Buttons (Add Anthro Modal):

- 

 - Press the metric button to enter data in metric untis or to convert it. Data will display by default in English units.
- **OK** – Press this button to close the modal and add a new unsaved record to the grid.
- **Cancel** – Press this button to close the modal without adding a new record to the grid.
- **(Close Window)** – The modal is closed without adding a new record to the grid.
- **(Edit Icon)** – Press this button to open up the edit page to allow for desired modifications to an existing record.
-  **(Delete Icon)** – Press this button to remove an existing record.

NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Add Pending Lab Code** – Press this button to display the add modal and add records to the anthropometric data grid. A pending lab code record may not be added to the grid if an anthropometric measurement with the same medical data date already exists. Additionally, an anthropometric measurement is required at the date of the certification visit; therefore, a pending lab code may not be used at the initial certification of the Client. For more information, see background process number one.

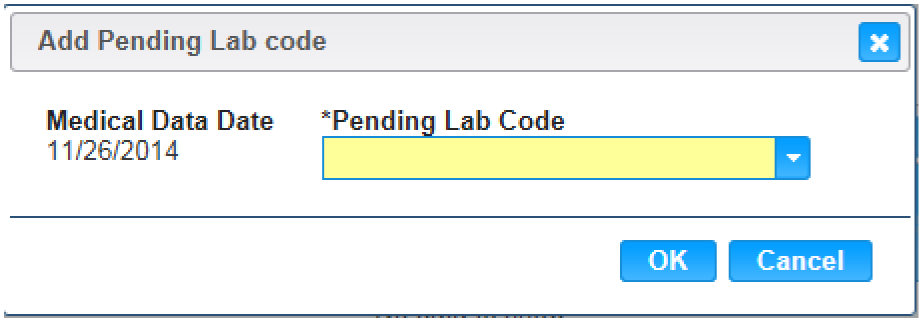


Figure 91: Add Pending Lab Code Modal

Fields (Add Pending Lab Code Modal):

- **Medical Data Date –** The date that the pending lab code was applied instead of anthropometric measurement data for the Client. This field is disabled and defaults to today's date.
- **Pending Lab Code –** The pending lab code of the Client. This field is mandatory and selected from a drop down list. For more information, see the Pending Lab Code base table section of this document.

Buttons (Add Pending Lab Code Modal):

- **OK –** Press this button to close the modal and add a new unsaved record to the grid.
- **Cancel –** Press this button to close the modal without adding a new record to the grid.
- **(Close Window) –** The modal is closed without adding a new record to the grid.
- **(Edit Icon) –** Press this button to open up the edit page to allow for desired modifications to an existing record.
- **(Delete Icon) –** Press this button to remove an existing record.

NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Add Blood Work –** Press this button to display the add modal and add records to the blood work data grid. If the woman is postpartum then the user will not be allowed to enter blood work record with a date prior to the Client being greater than 4 weeks (28 days) postpartum. The user will have to add the pending lab code as setup by the state agency for these scenarios.

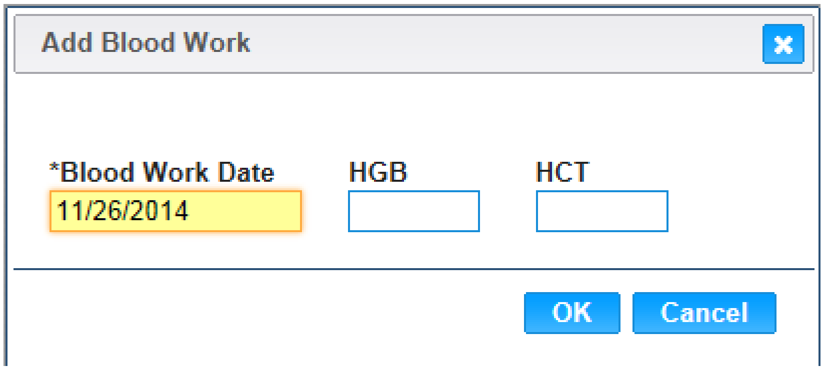


Figure 92: Add Blood Work Modal

Fields (Add Blood Work Modal):

- **Medical Data Date** – The date that blood work was taken. This field is mandatory and defaults to today's date. The date entered cannot be in the future or more than 90 days in the past.
- **HGB** – The hemoglobin blood work value of the Client. This field is mandatory if data has not been entered in the HCT field. The field only accepts values of 5.0 – 24.1.
- **HCT** – The hematocrit blood work value of the Client. This field is mandatory if data has not been entered in the HGB field. This field only accepts values of 18.0 – 72.1.

NOTE: The user can enter data in both the HGB and HCT fields. The blood work data entered is validated against acceptable ranges to determine what anemia WIC Code needs to be assigned if any. For more information, see background process number two.

Buttons (Add Blood Work Modal):

- **OK** – Press this button to close the modal and add a new unsaved record to the grid.
- **Cancel** – Press this button to close the modal without adding a new record to the grid.
- **(Close Window)** – The modal is closed without adding a new record to the grid.
- **(Edit Icon)** – Press this button to open up the edit page to allow for desired modifications to an existing record.
- **(Delete Icon)** – Press this button to remove an existing record.

NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Add Pending Lab Code** – Press this button to display the add modal and add records to the blood work grid. A pending lab code record may not be added to the grid if a blood work data record with the same medical data date already exists. For more information, see background process number one.

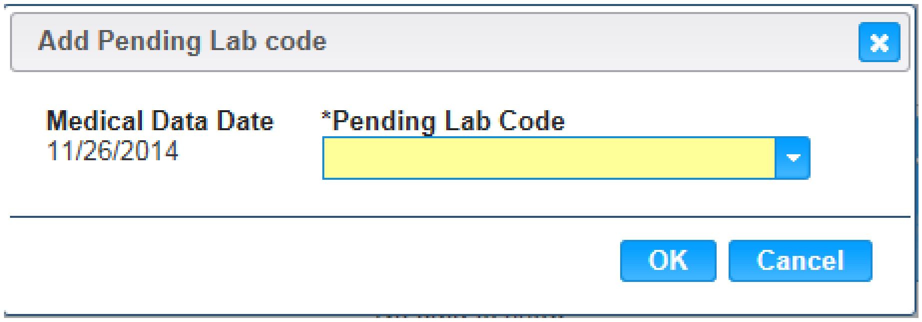


Figure 93: Add Pending Lab Code Modal

Fields (Add Pending Lab Code Modal):

- **Medical Data Date –** The date that the pending lab code was applied instead of a blood work data record for the Client. This field is disabled and defaults to today's date.
- **Pending Lab Code –** The pending lab code of the Client. This field is mandatory and selected from a drop down list. For more information, see the Pending Lab Code base table section of this document.

Buttons (Add Pending Lab Code Modal):

- **OK –** Press this button to close the modal and add a new unsaved record to the grid.
- **Cancel –** Press this button to close the modal without adding a new record to the grid.
- **(Close Window) –** The modal is closed without adding a new record to the grid.
- **(Edit Icon) –** Press this button to open up the edit page to allow for desired modifications to an existing record.
- **(Delete Icon) –** Press this button to remove an existing record.

NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Signatures –** Press this button to navigate to the Signatures page. For more information, see the Signatures section of this document.
- **Print Rights & Obligations –** Press this button to populate the rights & obligations form. For more information, see the Forms section of this document.
- **Save –** Press this button to save changes made to the page. For more information, see background process number three.
- **Graphs –** Press this button to navigate to the Graphs page. For more information, see the Woman Graphs section of this document.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) **Metric weight in grams** = English weight in ounces * 28.3495
2) **English weight in ounces** = Metric weight in grams * 0.03527396
3) **Metric height in millimeters** = English height in eighths of an inch * 3.1496

4) **English height in eighths of an inch** = Metric height in millimeters * 0.3175
5) **Weeks Gestation =** round [40-((Expected Delivery Date – Anthropometric Medical Data Date) /7]
6) **Avg. Wt G/L/Wk =** Weight Gain / Weeks Gestation
7) **BMI English Formula:** BMI = [Weight in pounds / Height in inches / Height in inches] x 703
8) **BMI Metric Formula:** BMI = [Weight in kilograms / Height in cm / Height in cm] x 10,000

Background Processes:

1) The use of a pending lab code for anthropometric and blood work data when it is required will limit the issuance of food benefits to the number of months as setup by the State Agency in the pending lab code base table for the pending lab code base table record used. The user can enter a pending lab code on a monthly basis but will only be allowed to issue the number of months as setup by the State Agency of benefits each time. The State Agency also has the ability to limit the recurrence of the pending lab code. For more information on pending lab code setup, see the pending lab code base table section of this document. For more information on issuance, see the Issuance section of the Food Package LA DFDD.

2) The bloodwork data entered is validated against records setup by the state agency in the Category Blood Works base table (For more information, see the Category Blood Works base table section of this document). The system determines the acceptable range by checking the type of blood work data entered (HGB or HCT), Client's category, age range, and elevation. The Client's elevation is determined by using the elevation of the Clinic that the Client is in. For more information, see the Organizational Units section of the Operations Management DFDD. If the system determines that the entered value is below the low value for the blood work type, then WIC Code 201 will be automatically assigned to the Client.

3) The system performs a four step save process when saving a new medical record:
    a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
    b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
    c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
    d. Finally, after the other three steps have been completed successfully the system adds the entered data to the database.

4) The mid-cert health check icon will be displayed on the Client's active record if the Client meets the following criteria:

Category	Logic
EN, PN, PN+	Icon will be displayed if no medical data record with a date created exists on or after 140 days of the active certification start date
P, PG1, PG2	Mid-Cert Icon will not used

A mid-certification medical update may assign new WIC Codes, but the priority of the Client, may only be raised and not lowered. For more information on Priority, see the Care Plan section of the Nutrition Education DFDD. The medical update will also not remove WIC Codes that have already been saved for the Client even if they no longer apply for historical reasons. Instead the WIC Codes that no longer apply will have the active flag on the care plan page unchecked. For more information, see the Care Plan section of the Nutrition Education DFDD.
For PG1 and PG2 category Clients medical data is required to be entered every visit.

Therefore, the medical tab for the Client's record will displayed in red  every time a medical data record does not exist with a medical data date equal to today's date.

5) The missing medical icon will be displayed on the Client's active record if the Client meets the following criteria:

Category	Logic
EN, PN, PN+, P, PG1, PG2	Icon will be displayed if a pending lab code was used for the most recent anthropometric or a blood work data record and is no longer valid

6) The following is a description of the BMI calculations and rules to determine the weight status (underweight, normal, overweight, and obese) of women. The weight status is used to determine the assignment of WIC Codes for the Client.
The following formula is used to determine the weight status of pregnant Clients:

BMI = [(prepreg weight in kg) / ((height in meters) squared)]

The following formula is used to determine the weight status of postpartum and breastfeeding Clients:

BMI = [(weight in kg) / ((height in meters) squared)]

Calculated BMI	Weight Status
Under 18.5	Underweight
18.5 to 24.9	Normal
25 to 29.9	Overweight
30+	Obese

WIC Codes will be assigned to Clients based on the Client's category, calculated BMI, and weight status.

NOTE: For postpartum and breastfeeding Clients less than 6 months postpartum the Client's prepreg weight will be used to calculate BMI instead of the Client's current weight. This is due to the fact that current weight will be influenced by the Client's recent pregnancy.

NOTE: All WIC Codes will not be saved to the Client's record until the complete assessment button is pressed on the care plan page. For more information, see the Care Plan section of the Nutrition Education DFDD.

For pregnant women regardless of weeks gestation:

Calculated BMI	Weight Status	Category	WIC Code
Under 18.5	Underweight	PG1, PG2	101
18.5 to 24.9	Normal	PG1, PG2	None
25 to 29.9	Overweight	PG1, PG2	111
30+	Obese	PG1, PG2	111

- WIC Code 132 is assigned if before 13 weeks gestation current weight is less than pre-pregnancy weight.

For pregnant women over 13 weeks gestation (If Client is less than or equal to 13 weeks gestation the following WIC Codes will not be assigned):

- WIC Code 131 is assigned to singleton pregnant women if:
    - The Client is underweight pre-preg vs height (BMI<18.5) and has gained less than [35.2oz + (15.29oz times (current weeks gestation – 13))]
    - The Client is normal pre-preg vs height (BMI 18.5-24.9) and has gained less than [35.2oz + (13.51oz times (current weeks gestation – 13))]
    - The Client is overweight pre-preg vs height (BMI 25-29.9) and has gained less than [35.2oz + (7.58oz times (current weeks gestation – 13))]
    - The Client is obese pre-preg vs height (BMI>=30) and has gained less than [35.2oz + (5.98oz times (current weeks gestation – 13))]

- WIC Code 131 is assigned to pregnant women with multiples if:
    - The Client is normal pre-preg vs height (BMI 18.5-24.9) and has gained less than [120.1oz + (17.48oz times (current weeks gestation – 13))]
    - The Client is overweight pre-preg vs height (BMI 25-29.9) and has gained less than [59.4oz + (16.17oz times (current weeks gestation – 13))]
    - The Client is obese pre-preg vs height (BMI>=30) and has gained less than [51.4oz + (12.92oz times (current weeks gestation – 13))]

    NOTE: There is no general recommendation for women who were underweight pre-preg vs height (BMI<18) and are pregnant with multiples so WIC Code 131 would not be assigned.

- WIC Code 132 is assigned if after 13 weeks gestation the current entered weight for the Client is 32 or more ounces less than the weight entered for the last most recent anthropometric measurement record.

- WIC Code 133 is assigned to singleton pregnant women if:
  - The Client is underweight pre-preg vs height (BMI<18.5) and has gained more than [105.7oz + (19.79oz times (current weeks gestation – 13))]
  - The Client is normal pre-preg vs height (BMI 18.5-24.9) and has gained more than [105.7oz + (16.83oz times (current weeks gestation – 13))]
  - The Client is overweight pre-preg vs height (BMI 25-29.9) and has gained more than [105.7oz + (10.9oz times (current weeks gestation – 13))]
  - The Client is obese pre-preg vs height (BMI>=30) and has gained more than [170.4oz + (9.24oz times (current weeks gestation – 13))]

- WIC Code 133 is assigned to pregnant women with multiples if:
  - The Client is normal pre-preg vs height (18.5-24.9) and has gained more than [137.7oz + (26.9oz times (current weeks gestation – 13))]
  - The Client is obese pre-preg vs height (BMI>=30) and has gained more than [91.3oz + (26.25oz times (current weeks gestation – 13))]
  - The Client is obese pre-preg vs height (BMI>=30) and has gained more than [86.4oz + (21.69oz times (current weeks gestation – 13))]

  NOTE: There is no general recommendation for women who were underweight pre-preg vs height (BMI<18) and are pregnant with multiples so WIC Code 133 would not be assigned.

For postpartum and breastfeeding women:

Calculated BMI	Weight Status	Category	WIC Code
Under 18.5	Underweight	EN, P, PN, PN+	101
18.5 to 24.9	Normal	EN, P, PN, PN+	None
25 to 29.9	Overweight	EN, P, PN, PN+	111
30+	Obese	EN, P, PN, PN+	111

WIC Code 133 is assigned to postpartum and breastfeeding women if:

Calculated BMI	Weight Status	WIC Code is assigned if:
Under 18.5	Underweight	(Delivery Weight - Pre-Preg Weight) is more than 40lbs (640oz)
18.5 to 24.9	Normal	(Delivery Weight - Pre-Preg Weight) is more than 35lbs (560oz)
25 to 29.9	Overweight	(Delivery Weight - Pre-Preg Weight) is more than 25lbs (400oz)
30+	Obese	(Delivery Weight - Pre-Preg Weight) is more than 20lbs (320oz)

For postpartum, breastfeeding, and pregnant women:

- WIC Code 331 is assigned to women if the number of months between the Client's date of birth and [(The Client's (expected delivery date or actual delivery date) – 40 weeks)/12)] is less than 18.
- WIC Code 333 is assigned to women if the number of months between the Client's date of birth and [(The Client's (expected delivery date or actual delivery date) – 40 weeks)/12)] is less than 20 and the number of previous pregnancies is 3 or more.

NOTE: Number of previous pregnancies is recorded on the Client's assessment record. For more information, see the Assessment section of this document.

7.2 Edit a Medical Record

NOTE: The user may only edit records that they have created and on the same day as the record was created. If one of these conditions fails, then the user will not be able edit existing records in the anthropometric data grid or edit existing records in the blood work data grid. The user will have to add new medical records with updated medical data dates.

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Edit a Medical Record

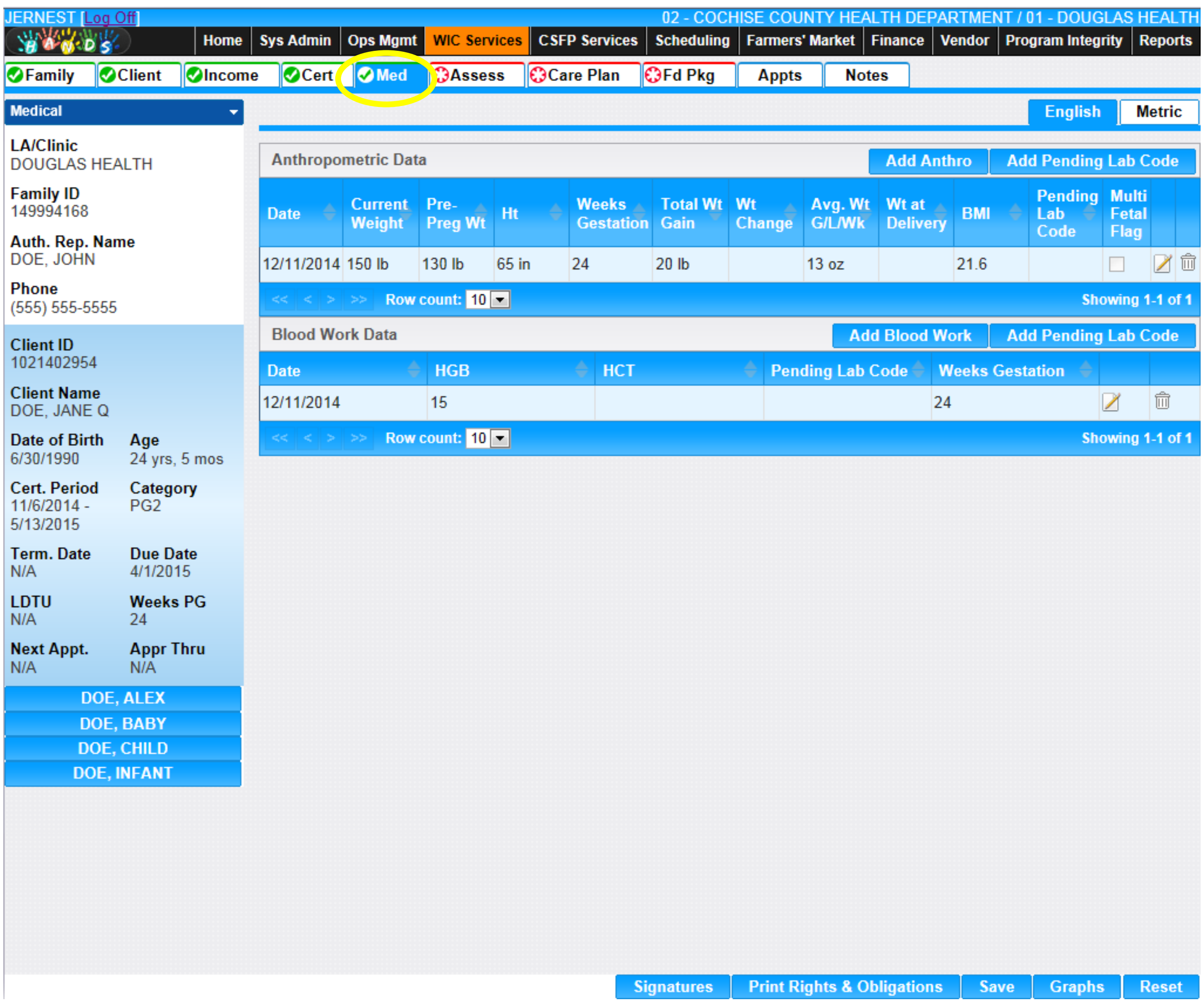


Figure 94: Edit a Medical Record

NOTE: The edit a medical record page functions similarly to the add a new medical record page.

7.3 Women Graphs

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Graphs

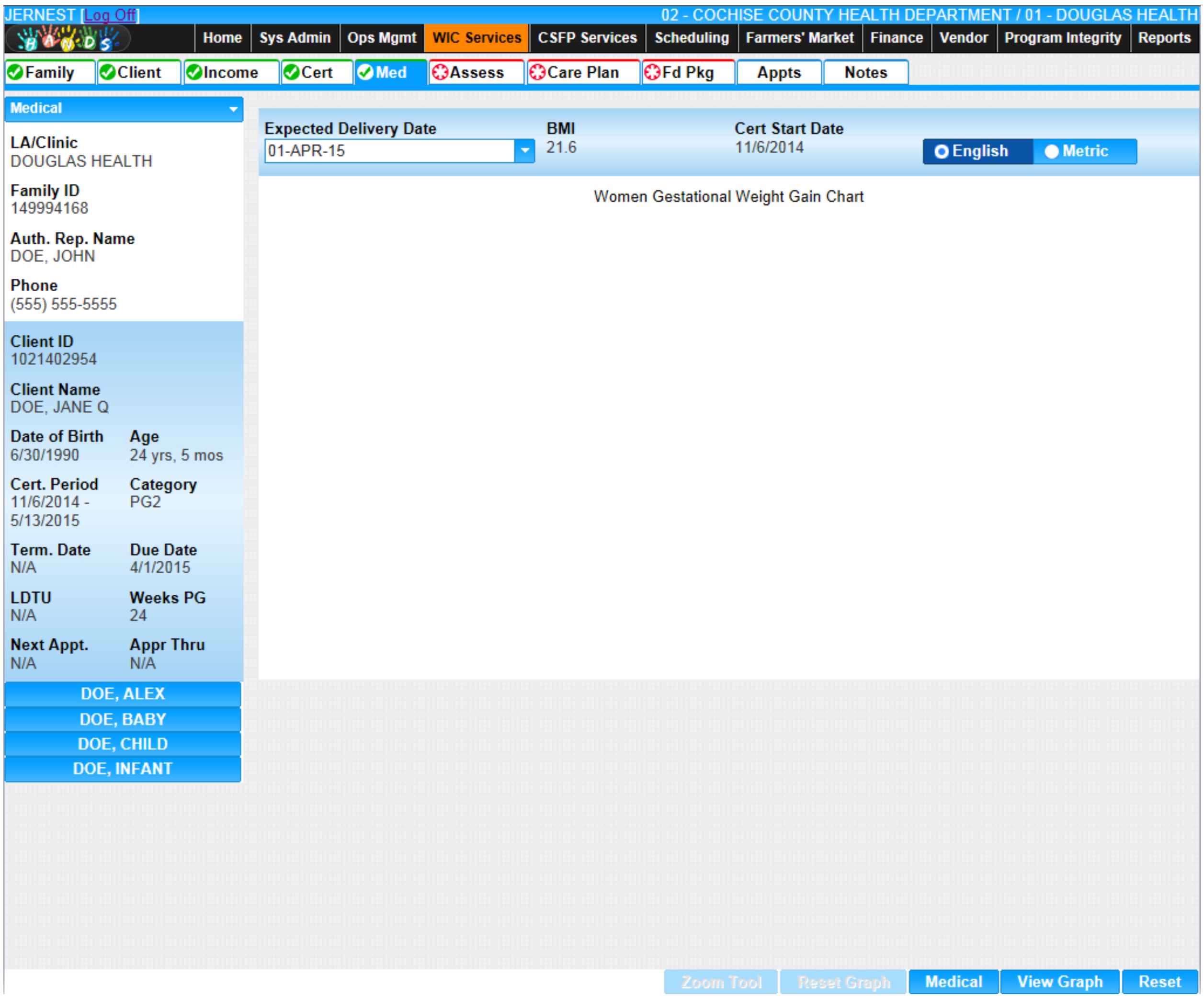


Figure 95: Graph

Fields:

- **Expected Delivery Date –** The expected delivery date for the Client. If the Client has been on WIC for more than one pregnancy, they may select a past expected delivery date from the drop down list to populate the graph.
- **English/Metric –** Selection options (English or Metric) that determine what units will be used to populate the graph. This field is mandatory and will default to English.

- **BMI –** The calculated BMI for the Client. This field is display only. For more information, see calculations number one and two.
- **Cert Start Date –** The start date for the most recent certification period.

Buttons:

- **Zoom Tool –** Press this button to bring up the zoom tool, used for zooming into a specific area of the populated graph. This button will be disabled until a graph is populated.

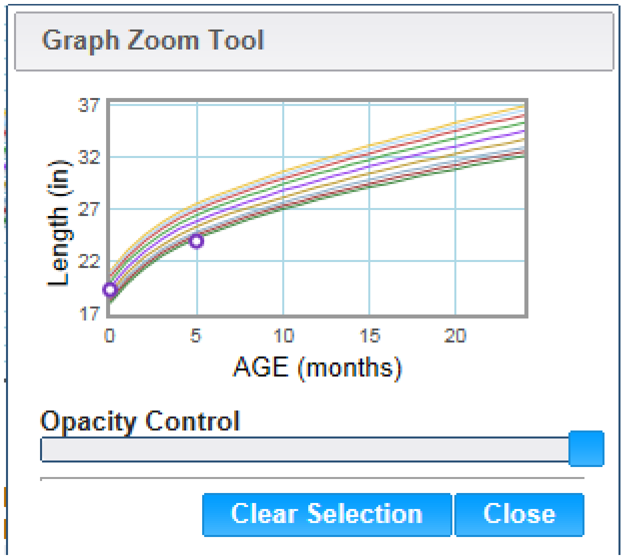


Figure 96: Zoom Tool Modal

Buttons:

- ➢ **Opacity Control –** Slider used to determine the opacity of the zoom tool modal. The further the slider is to the left the more see through the zoom tool modal will be.
- ➢ **Clear Selection –** Press this button to clear the current selected area and return the graph to its original form.
- ➢ **Close –** Press this button to close the zoom tool modal.

- **Reset Graph –** Press this button to reset the graph to its original state. This button will be disabled until a graph is populated.
- **Medical –** Press this button to return to the Medical page.
- **View Graph –** Press this button to populate the page with the graph.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) **BMI English Formula:** BMI = [Weight in pounds / Height in inches / Height in inches] x 703

2) **BMI Metric Formula:** BMI = [Weight in kilograms / Height in cm / Height in cm] x 10,000

7.3.1 Woman Gestation Weight Gain Graph

Narrative:

The purpose of this page is to display the average gestation weight gain for pregnant Clients related to the Client's weeks gestation, pre-pregnancy calculated BMI, and gestational status (whether the mother is pregnant with multiples or not). The recommended weight gain percentile lines displayed on the graph will change based on the woman's calculated pre-pregnancy BMI and gestational status.

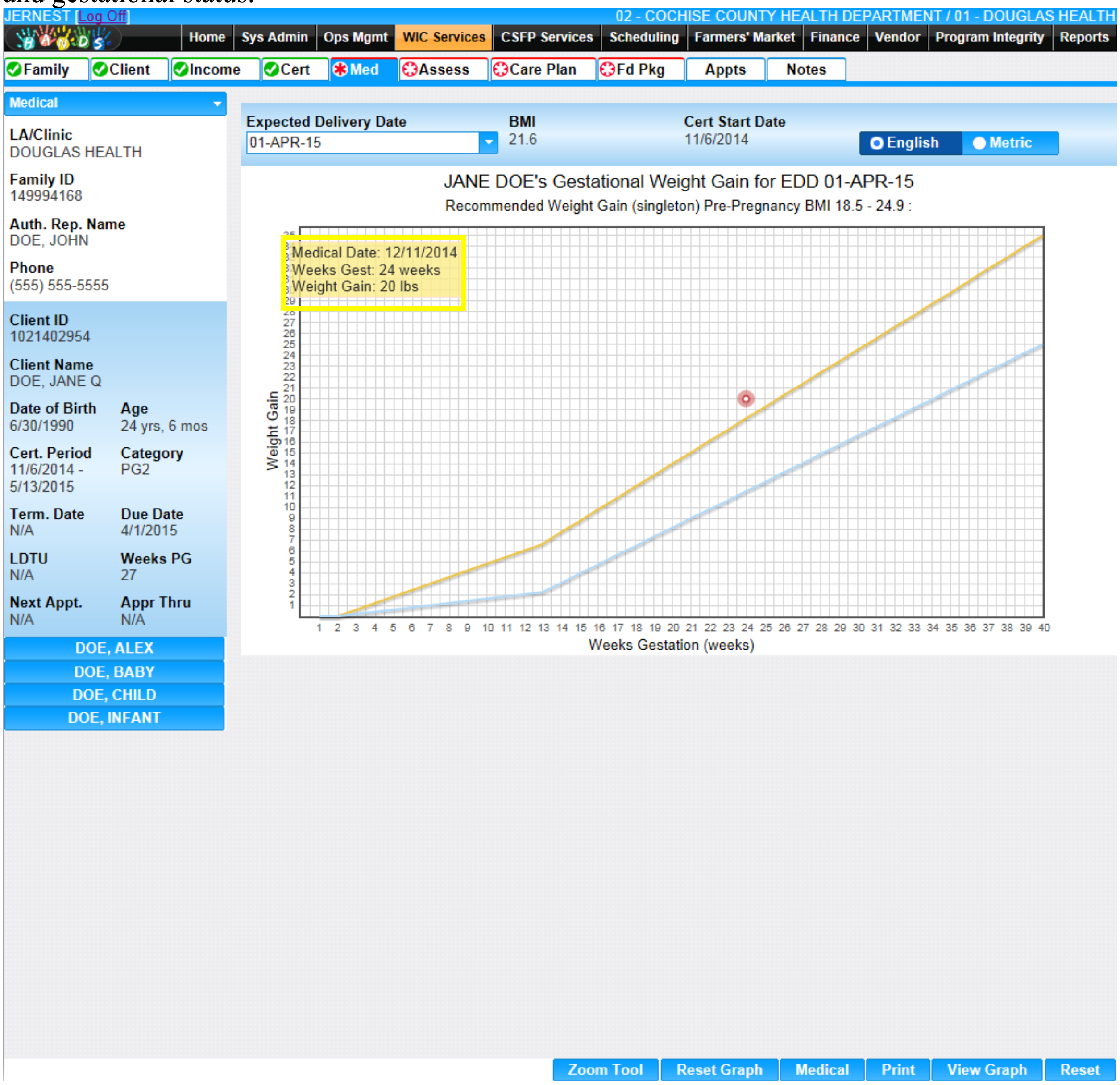


Figure 97: Woman Gestation Weight Gain Graph

NOTE: The title of the graph (Recommended Weight Gain (singleton) Pre-Pregnancy BMI 18.5-24.9) will adjust based on the Woman Gestational Weight Grain graph being displayed. For example, a Woman with a pre-pregnancy BMI of 31 and pregnant will multiples will have a different graph title and percentile lines then a woman who has a BMI of 18. The new graph title for this example would be Recommended Weight Gain (multiples) Pre-Pregnancy BMI 30+.

Fields:

- **Expected Delivery Date –** The expected delivery date for the Client. If the Client has been on WIC for more than one pregnancy, they may select a past expected delivery date from the drop down list to populate the graph
- **English/Metric –** Selection options (English or Metric) that determine what units will be used to populate the graph. This field is mandatory and will default to English.
- **BMI –** The calculated BMI for the Client. This field is display only. For more information, see calculations number one and two.
- **Cert Start Date –** The start date for the most recent certification period.

Buttons:

- **Zoom Tool –** Press this button to bring up the zoom tool, used for zooming into a specific area of populated graph. This button will be disabled until a graph is populated.
- **Reset Graph –** Press this button to reset the graph to its original state. This button will be disabled until a graph is populated.
- **Medical –** Press this button to return to the Medical page.
- **Print –** Press this button to print the exact image displayed in the main graph section. *NOTE: If the graph has been zoomed into then the zoomed in graph will be printed.*
- **View Graph –** Press this button to populate the page with the graph.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) **BMI English Formula:** BMI = [Weight in pounds / Height in inches / Height in inches] x 703
2) **BMI Metric Formula:** BMI = [Weight in kilograms / Height in cm / Height in cm] x 10,000
3) **Weeks Gestation =** round [40-((Expected Delivery Date – Anthropometric Medical Data Date) /7]

Background Processes:

1) Using the mouse, the user has the ability to hover over a data point on the graph. When this is performed the medical data box will open displaying specific information about the data point.

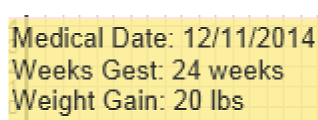


Figure 98: Medical Data Box

Fields:

- ➢ **Medical Date –** The medical data date for the anthropometric measurement record. This field is display only.
- ➢ **Weeks Gest –** The number of weeks pregnant for the Client. This field is display only and will only populate with data if the Client is of a pregnant category. For more information, see calculation number three.

- **Weight Gain –** The amount of weight gained from the pre-pregnancy weight entered for the Client.

8 ASSESSMENT PAGE

Narrative:

The purpose of this page is to record and maintain health and nutrition information about the Client. Along with encourage discussion between the Client and the user. The user has the ability to manually assign WIC Codes along with view WIC Codes that are automatically assigned to the Client based on data entered throughout the Client/Family's record. The data displayed on the different sections of the assessment page is setup by the State Agency based on the Client's certification category. For more information on Assessment Setup, see the Assessment Setup section of the System Administration DFDD.

8.1 Add a New Assessment Record

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Assessment

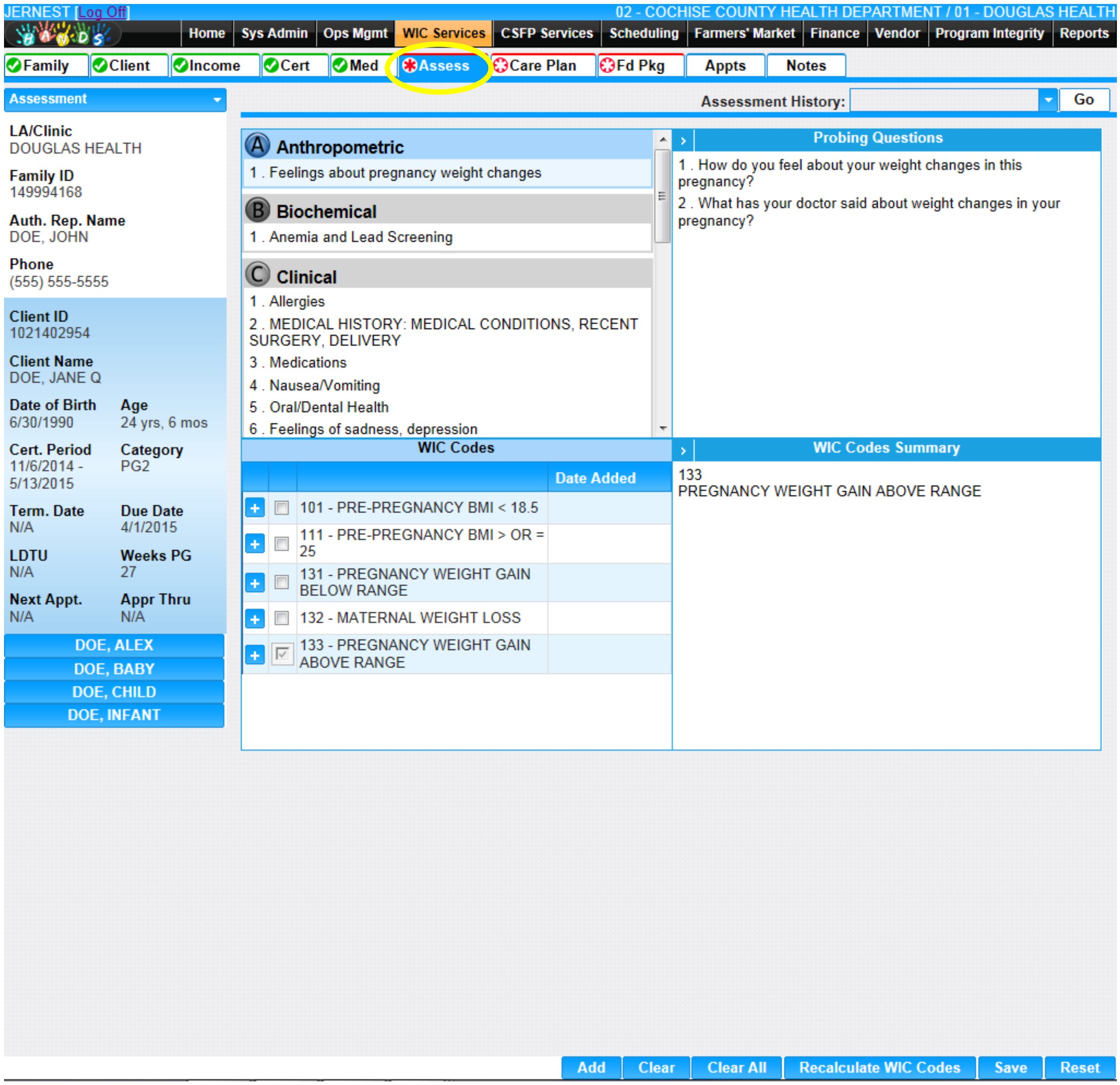
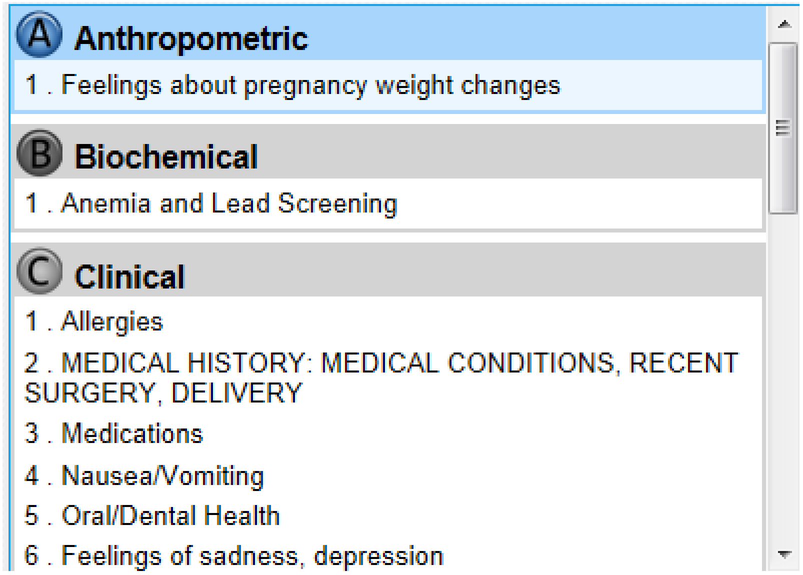


Figure 99: Add a New Assessment

The assessment screen is broken up into four sections.

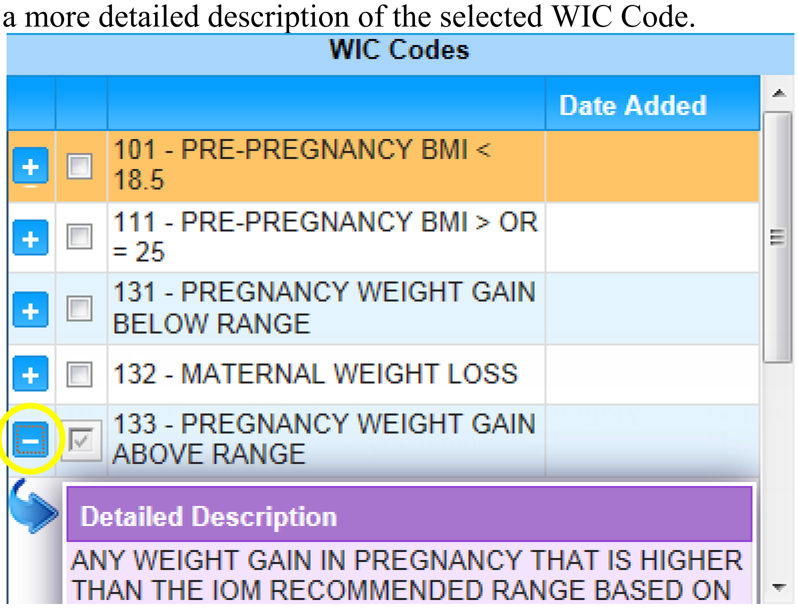
- The first section contains the assessment main groups (A, B, C, D, and E), assessment topics, and standard questions. Clicking on the assessment main groups will cause the WIC Codes and probing questions sections to update based on the new assessment main group selected.

Assessment Main Groups
A - Anthropometric
B - Biochemical
C - Clinical
D - Diet & Nutrition
E - Environmental



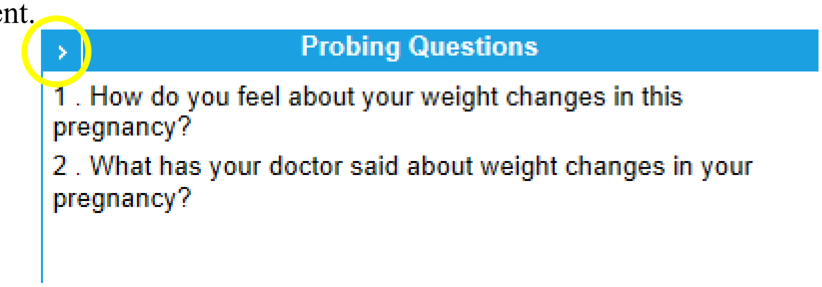
NOTE: Standard questions appear in the first section of the assessment page and require data entry. An error message will appear when no data is entered and the save button is pressed.

- The second section contains all WIC Codes based on the assessment main group selected and the Client's category. The user will have the ability to manually assign WIC Codes to the Client using this section by checking the checkbox next to the WIC Codes they would like to assign.. Clicking on the plus icon next to a record in the grid will expand the item and show a more detailed description of the selected WIC Code.

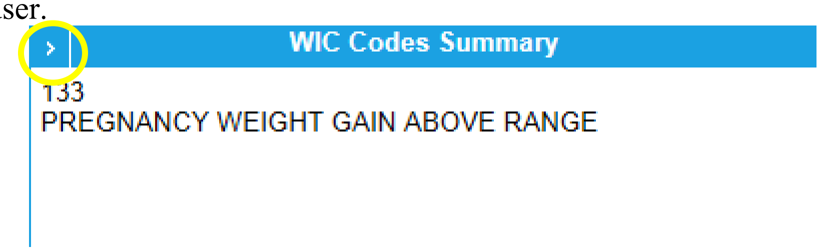


NOTE: WIC Codes that have been system assigned to the Client will have a checkmark next to them, be disabled (user will not have the ability to uncheck the checkbox), and display in the WIC Code summary pane.

- The third section contains hidden probing questions which will expand for viewing when the user clicks on the hidden vertical accordion icon. These questions require no data entry and are used to help the user decide if additional WIC Codes need to be assigned to the Client.



- The final section contains the WIC Codes summary pane, which will expand for viewing when the user clicks on the hidden vertical accordion icon. This section displays all WIC Codes that have either been assigned automatically by the system or manually assigned by the user.



NOTE: WIC Codes are not actually committed to the Client until the complete assessment button is pressed on the Care Plan page. When the complete assessment process has been completed successfully the WIC Codes that were assigned to the Client will have a date added next to them in both the WIC Codes and WIC Codes Summary sections of the page. The user will not be able to unassign (uncheck) any WIC Code with a date added next to it in the WIC Codes section of the page. The date that will be placed next to these WIC Codes will be the current date of when the complete assessment process was successfully completed. For more information on the Complete Assessment process, see the Care Plan section of the Nutrition Education DFDD.

Buttons:

- **Assessment History –** A drop down list used for selecting past saved assessment records. Records in the list will be selected by the date that they were originally added for the current certification period.
- **Go –** Press this button to populate the page with data from the record selected in the assessment history drop down list.
- **Add –** Press this button to add a new assessment record for the Client. This button cannot be clicked if an assessment record has already been saved for the current date.

NOTE: If a past certification exists for a different date it will be moved to the assessment history drop down list.

- **Clear –** Press this button to clear all of the manually assigned WIC Codes for the currenty selected assessment main group.
- **Clear All –** Press this button to clear all of the manually assigned WIC Codes on all of the assessment main group sections.

- **Recalculate WIC Codes –** Press this button after changes have been made throughout the entire Client's record to update the WIC Codes that display in the WIC Codes Summary section of the page.
- **Save –** Press this button to save changes made to the page. For more information, see background process number one.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations: None

Background Processes:

1) The system performs a four step save process when saving a new assessment:
    a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
    b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
    c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
    d. Finally, after the other four steps have been completed without issue, the system will successfully save the page and add the data to the database.
2) The following WIC Codes will be assigned to a Client based on user entered data into the standard questions that appear on the Client's assessment record.
   NOTE: Standard Questions are set up by the state agency and require a development change to update/add logic. For more information, see the Assessment Setup section of the System Administration DFDD.

   For pregnant women:

Standard Question	WIC Code	Logic
Number of Previous Pregnancies	333	WIC Code 333 is assigned to women if the number of months between the Client's date of birth and [(The Client's expected delivery date – 40 weeks)/12)] is less than 20 and the number of previous pregnancies is 3 or more.
No Prenatal Care (Checkbox, default Unchecked)	None	If the checkbox selected, the date prenatal care began standard question will be disabled and number of doctor visits will be set to 0.
Date Prenatal Care Began	334	WIC Code 334 is assigned if the prenatal care being week > 26. The prenatal being week is calculated by getting the number of weeks between date prenatal care began date entered and the Client's expected delivery date.

<table>
<tr><td>Number of Doctor Visits</td><td>334</td><td>If any of the following conditions are met WIC Code 334 will be assigned:
<table>
<tr><th>Weeks’ Gestation</th><th>Doctor Visits</th></tr>
<tr><td>14-21</td><td>0</td></tr>
<tr><td>22-29</td><td>1 or less</td></tr>
<tr><td>30-31</td><td>2 or less</td></tr>
<tr><td>32-33</td><td>3 or less</td></tr>
<tr><td>34 or more</td><td>4 or less</td></tr>
</table>
</td></tr>
</table>

For postpartum and breastfeeding women:

Standard Question	WIC Code	Logic
Number of Previous Pregnancies	333	WIC Code 333 is assigned to women if the number of months between the Client’s date of birth and [(The Client’s expected delivery date – 40 weeks)/12)] is less than 20 and the number of previous pregnancies is 3 or more.

For breastfeeding infants:

Standard Question	WIC Code	Logic
Number of feedings in 24 hour period	411.7	WIC Code 411.7 is assigned if the age of the Client in months is >= 2 and < = 6 and number of feedings in 24 hour period < 6 OR the age of the Client in months is < 2 and number of feedings in 24 hour period < 8

For partially breastfeeding and partially (mostly) breastfeeding infants:

Standard Question	WIC Code	Logic
Number of feedings in 24 hour period	None	Data is only stored
Number of ounces of formula in 24 hours	None	Data is only stored
Ounces of concentrate ____ to ounces of water______	411.6	WIC Code 411.6 is assigned if the concentrate ratio is not 1:1 and/or the powder ratio is not 1:2
Ounces of powder_____ to ounces of water_____	411.6	WIC Code 411.6 is assigned if the concentrate ratio is not 1:1 and/or the powder ratio is not 1:2

NOTE: The user can only answer one of the ratio questions above related to WIC Code 411.6. When the user answers one of the two ratio questions above the fields for the other question will be disabled.

For non-breastfeeding (all formula) infants:

Standard Question	WIC Code	Logic
Number of ounces of formula in 24 hours	None	Data is only stored
Ounces of concentrate ____ to ounces of water_____	411.6	WIC Code 411.6 is assigned if the concentrate ratio is not 1:1 and/or the powder ratio is not 1:2
Ounces of powder_____ to ounces of water_____	411.6	WIC Code 411.6 is assigned if the concentrate ratio is not 1:1 and/or the powder ratio is not 1:2

NOTE: The user can only answer one of the ratio questions above related to WIC Code 411.6. When the user answers one of the two ratio questions above the fields for the other question will be disabled.

3) WIC Code 502 is assigned to any category Client who has been certified in WIC through the out-of-state transfer process. For more information, see the Out-of-State Transfer section of this document.

4) WIC Code 601 is assigned to postpartum and breastfeeding women if the woman is linked to a breastfeeding infant who has been certified in WIC.

5) WIC Code 701 is assigned to all infants under the age of six months.

6) WIC Code 702 is assigned to all infants under the age of 12 months and is of a breastfeeding category.

7) The mid-cert health check icon will be displayed on the Client's active record if the Client meets the following criteria:

Category	Logic
All Infant and Child Categories along with EN, PN, PN+	Icon will be displayed if no assessment record with a date created exists on or after 140 days of the active certification start date
P, PG1, PG2	Mid-Cert Icon will not used

A mid-certification assessment update may assign new WIC Codes, but the priority of the Client, may only be raised and not lowered. For more information on Priority, see the Care Plan section of the Nutrition Education DFDD. The assessment update will also not remove WIC Codes that have already been saved for the Client even if they no longer apply for historical reasons. Instead the WIC Codes that no longer apply will have the active flag on the care plan page unchecked. For more information, see the Care Plan section of the Nutrition Education DFDD.

8.2 Edit an Assessment Record

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Edit an Assessment

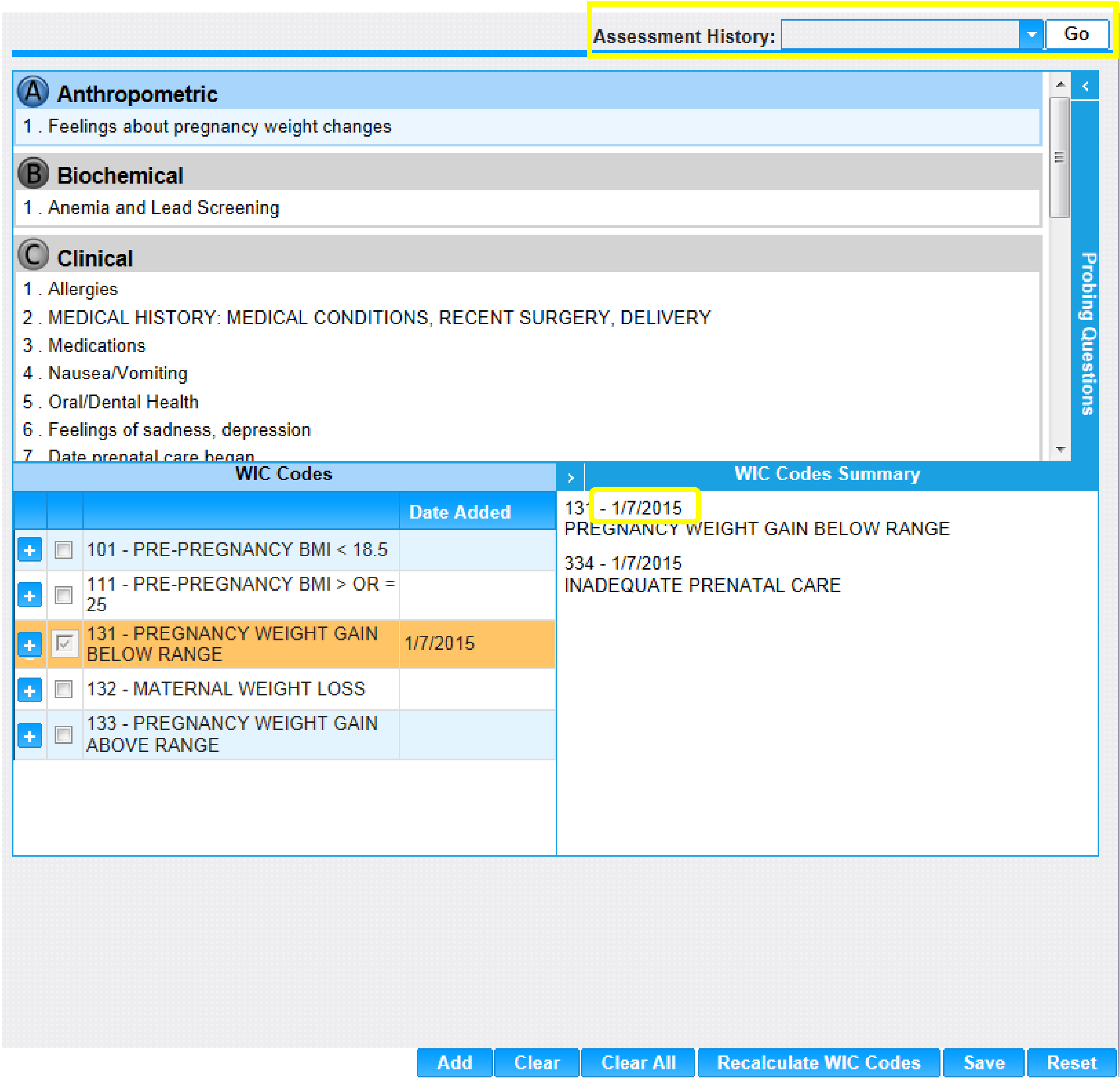


Figure 100: Edit an Assessment

NOTE: The edit an assessment page is the same as the add a new assessment page. However, the user will have the ability to press the add button. Pressing the add button will move the old assessment to the assessment history drop down and the system will produce a new blank assessment record. The assessment record in the history drop down will be completely disabled and selected from the drop down by using its creation date. The user is not allowed to add more than one assessment record on the same day. Additionally, WIC Codes that have been assigned and saved for a Client using the complete assessment process (For more information, see the Care Plan section of the Nutrition Education DFDD) will have the date assigned populated next to them. These codes will not be allowed to be removed for the Client's record.

9 TRANSFER

9.1 In-State Transfer

Narrative: The purpose of this page is to transfer Clients from Clinic to Clinic. The user can transfer an entire family or an individual Client. The user will select either a Family or Client to transfer by searching and selecting them from the Client/Family search page. The user must be logged into the Clinic to which the client should be transferred, then search in Agency or State options to return Clients that are not in the logged in Clinic. For example, if the user wants to transfer a Client at 02 Cochise/01 Douglas to 07 Maricopa/01 Downtown, then the user must be logged into 07 Maricopa/01 Downtown Clinic and search using State criteria to be able to select and transfer the Client that is in the 02 Cochise/01 Douglas Clinic. The user will then use the Trans Family and Trans Client buttons at the bottom of the page. Through the in-state transfer process the user can also move Client's from family to family within their own Clinic.

Navigation Path: WIC Services tab | Client/Family Search

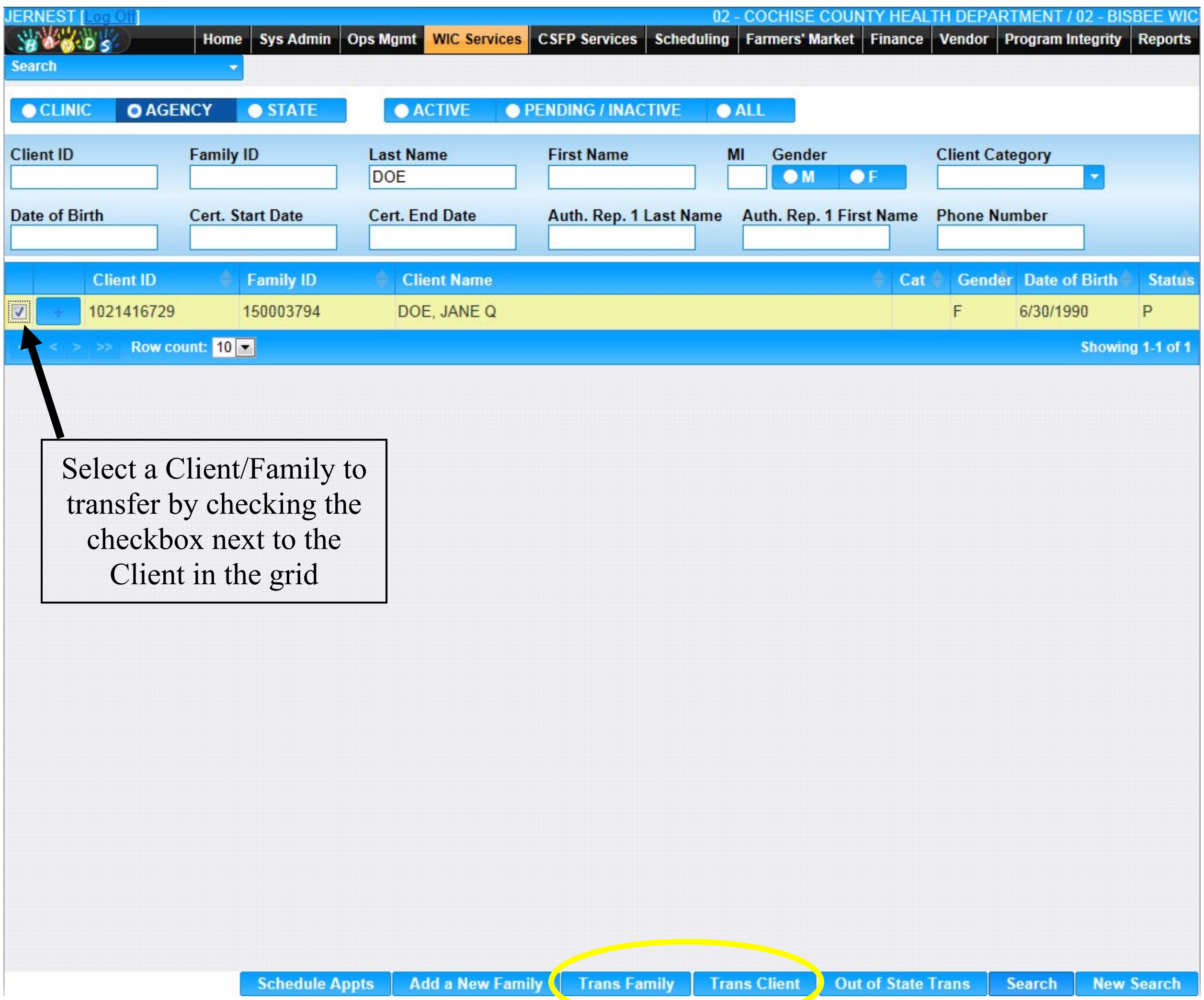


Figure 101: In-State Transfer

NOTE: The user only needs to select one Client within the desired Family in order to transfer the entire family.

Buttons:

- **Trans Family -** Press this button to transfer a Family. This button will not display on the page if the user is not logged into a specific clinic.
- **Trans Client -** Press this button to transfer a Client. This button will not display on the page if the user is not logged into a specific clinic.

Calculations: None

Background Processes:

1) When the user selects a Family to transfer and presses the Trans Family button the transfer Family modal will open.

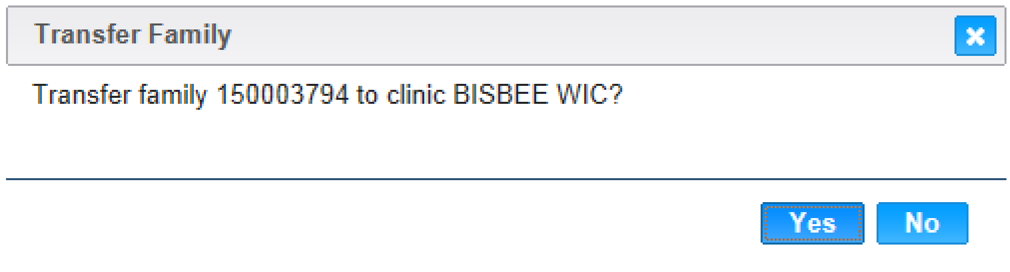


Figure 102: Transfer Family Modal

Buttons:

- **Yes –** Press this button to transfer the selected family to the Clinic the user is logged into. The user will be brought to the family information page for the transferred family.

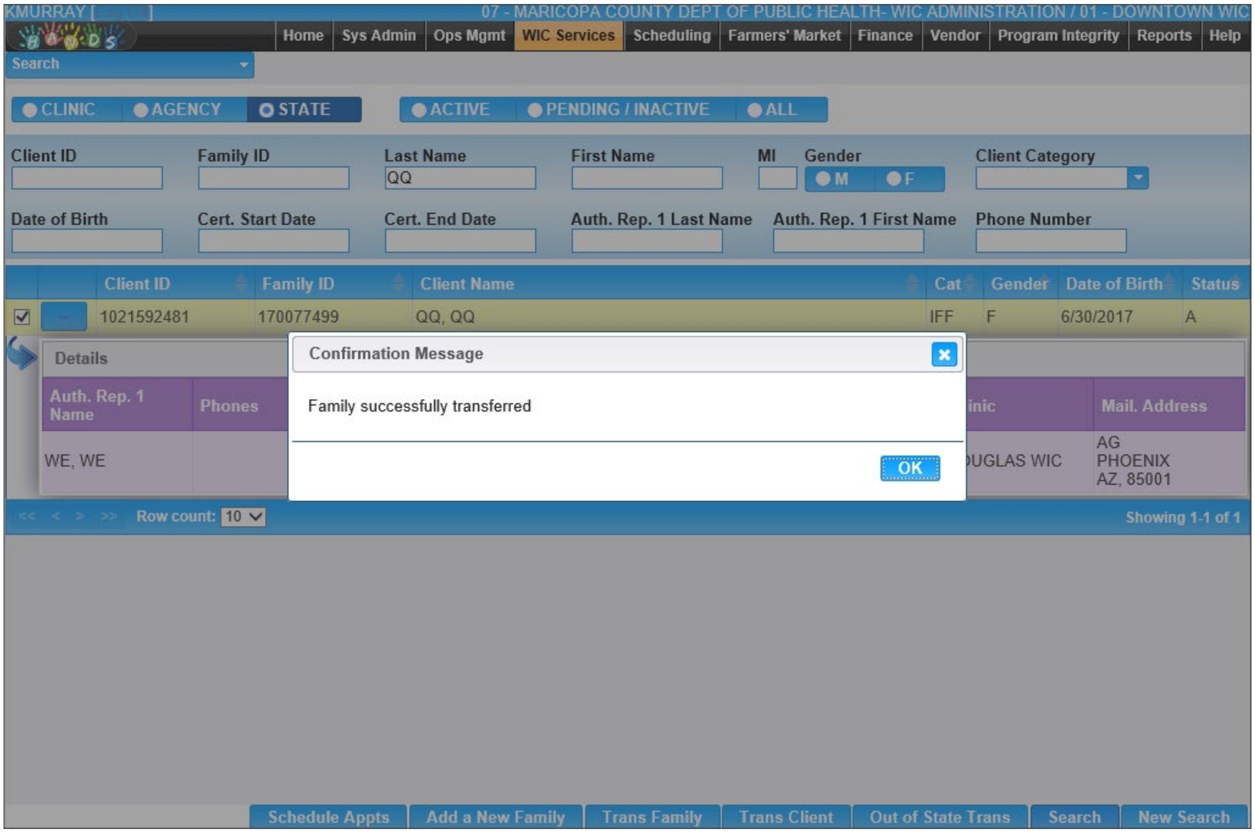


Figure 103: Transferred Family Successfully

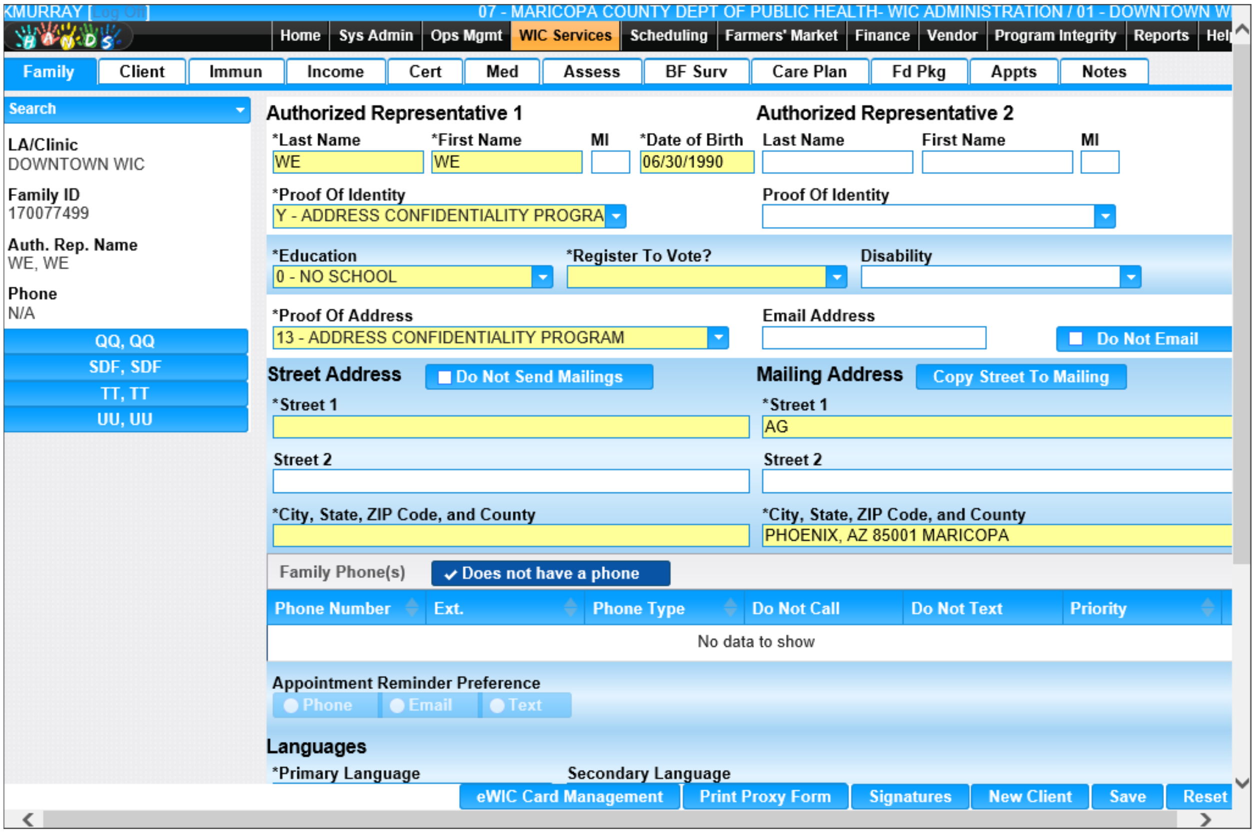


Figure 104: Transferred Family Populates the Family Information Page

- **No –** Press this button to close the transfer Family modal and stop the transfer process without anything being done to the Family's record. The user will be brought back to the Client/Family search page.

NOTE: When a transfer occurs the transfer, information is populated in the transfer section on the Client's history page. For more information, see the History section of this document.

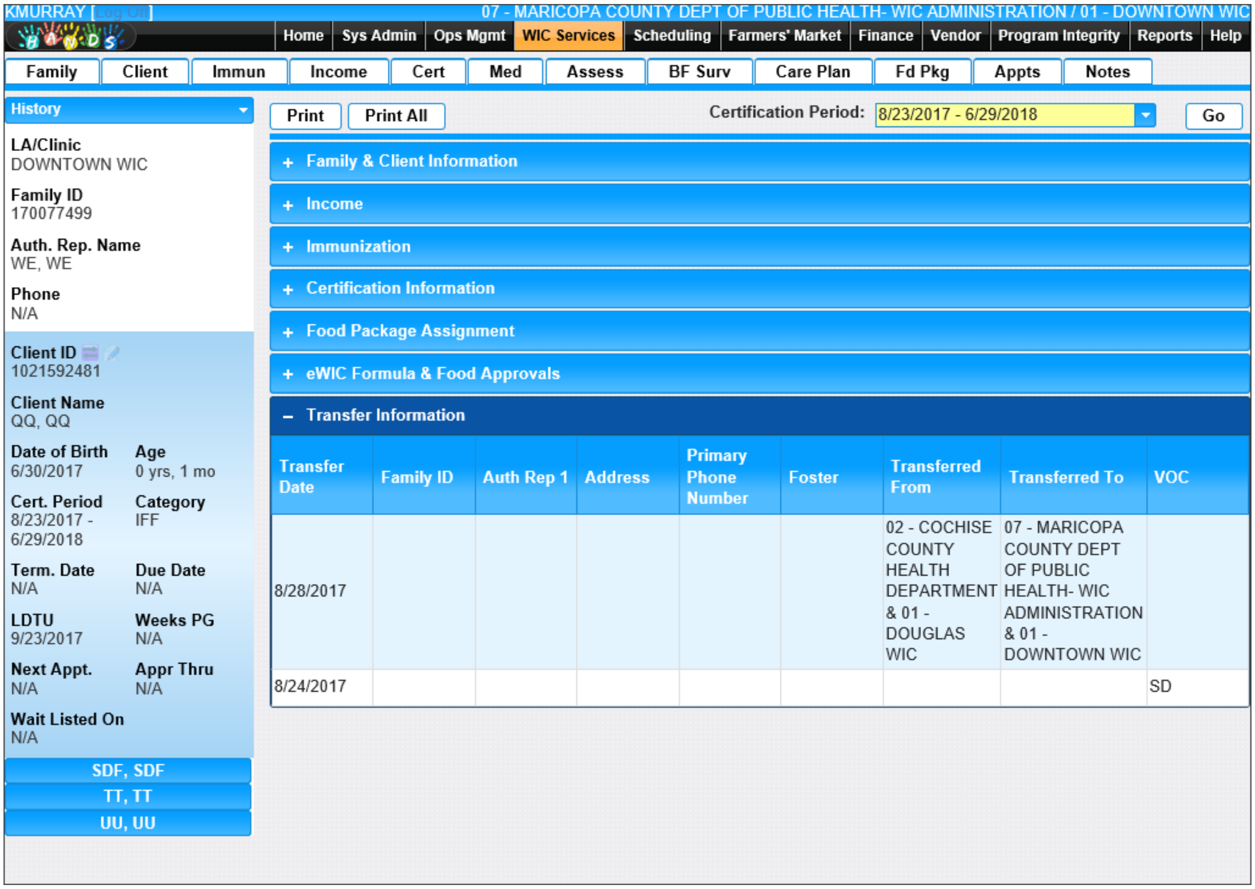


Figure 105: Transfer Information on the Client's History Page

2) When the user selects a Client to transfer and presses the Trans Client button the transfer Client modal is displayed to the user.

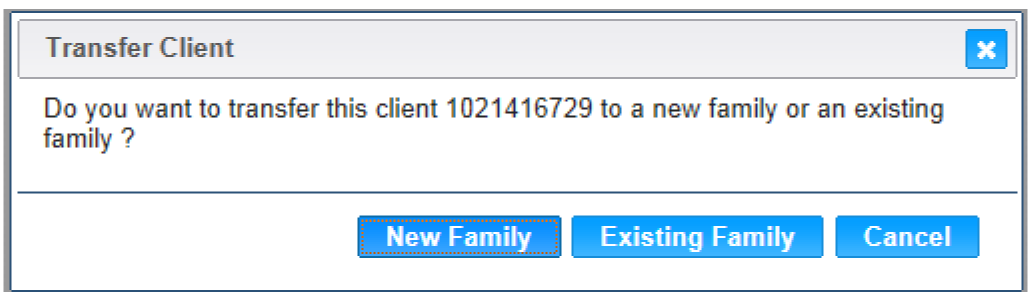


Figure 106: Transfer Client Modal

Buttons:

- **New Family –** Press this button to transfer the selected Client to a new family. The user will be brought to the Add a New Family page. The new family will have the transferred Client's record linked to it and will be within the users logged in Clinic. For more information on adding new families to the system, see the Add a New Family section of this document.
- **Existing Family –** Press this button to transfer the Client to an existing Family in the system. The user will be brought to the Existing Family Search page.

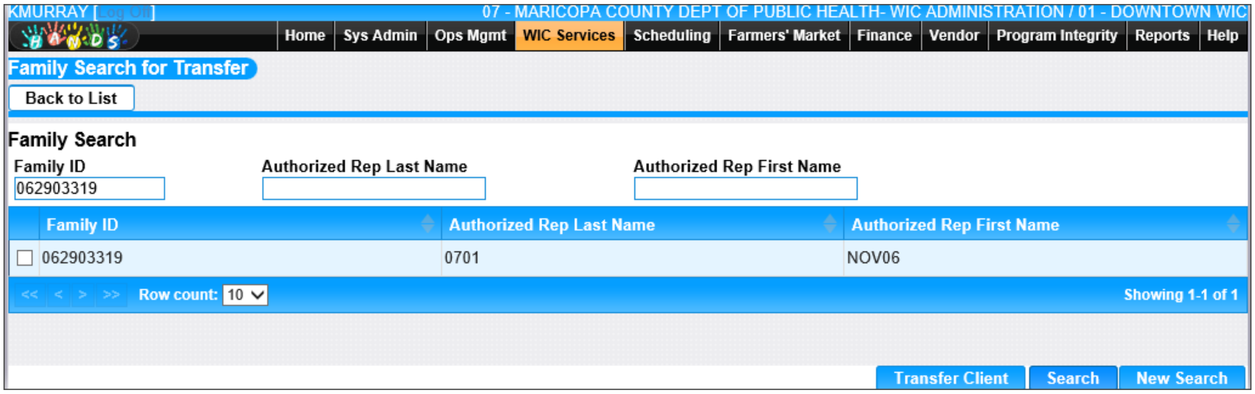


Figure 107: Existing Family Search page

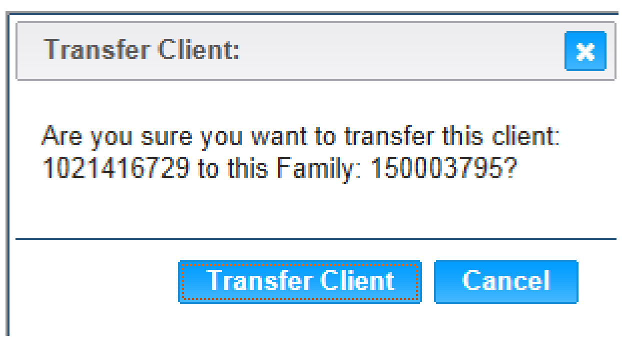
Fields:

- **Family ID –** A unique, system generated identification number for the Family. This field is optional.
- **Authorized Rep. Last Name -** The last name of the first authorized representative for the Family. This field is optional.
- **Authorized Rep. First Name -** The first name of the first authorized representative for the Family. This field is optional.

NOTE: The user can only search for Families that are within their logged in Clinic.

Buttons:

- **Transfer Client –** Press this button after selecting the desired Family from the search results grid to open the transfer Client confirmation modal.



Buttons:

- ➢ **Transfer Client –** Press this button to transfer the Client into the selected Family. The user will be brought to the Family information page for the transferred Client's new Family.
- ➢ **Cancel –** Press this button to stop the transfer Client process and return to the existing Family search page without the selected Client being transferred.

NOTE: When a transfer occurs the transfer, information is populated in the transfer section on the Client's history page. For more information, see the History section of this document.

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

    - **Back to List –** Press this button to stop the Client transfer process and return to the Client/Family search page. The selected Client will not be transferred.
- **Cancel –** Press this button to close the transfer Client modal and stop the transfer process without anything being done to the Client's record. The user will be brought back to the Client/Family search page.

Background Processes:

1) When a single Client is transferred to a new or existing family the following process occur for both the transferred Client's income and the Client's previous Family's income.
    a. Adjunct participation for the transferred Client will be moved with the Client.
    b. The transferred Client's income will be deleted from the Client's previous Family's current income and will have no impact on the new family. A record will be placed in the history of the Client's previous Family that will display the income for the transferred Client, so that it is not lost and there is a record what income the transferred Client was certified with.
    c. The system will not require the transferred Client to have income documented again until a new certification is needed.
    d. If the transferred Client is a foster child, a new income history record will be created with the same income documentation and income date as the most recent income and will have a Family size of 1.

9.2 Out-of-State Transfer

Narrative: The purpose of this page is to transfer Clients from outside of the state agency and into the user's agency. The user will can also re-activate those Client records who have left the state agency but now are returning and have an existing record within the system. The out-of-state transfer process only requires the user to enter the minimum required data in order to receive checks. At a minimum the user will need to enter save data on the Family information page, Client registration/information, and food package assignment. For more information on foo d package assignment, see the Food Package Assignment section of the Food Package LA DFDD. For those Client's under the age of 12 months the breastfeeding surveillance page will also need data to be entered and saved before the user can issue benefits to the Client. For more information on the breastfeeding surveillance page, see the Breastfeeding Surveillance section of the Breastfeeding DFDD.

Navigation Path: WIC Services tab | Client/Family Search

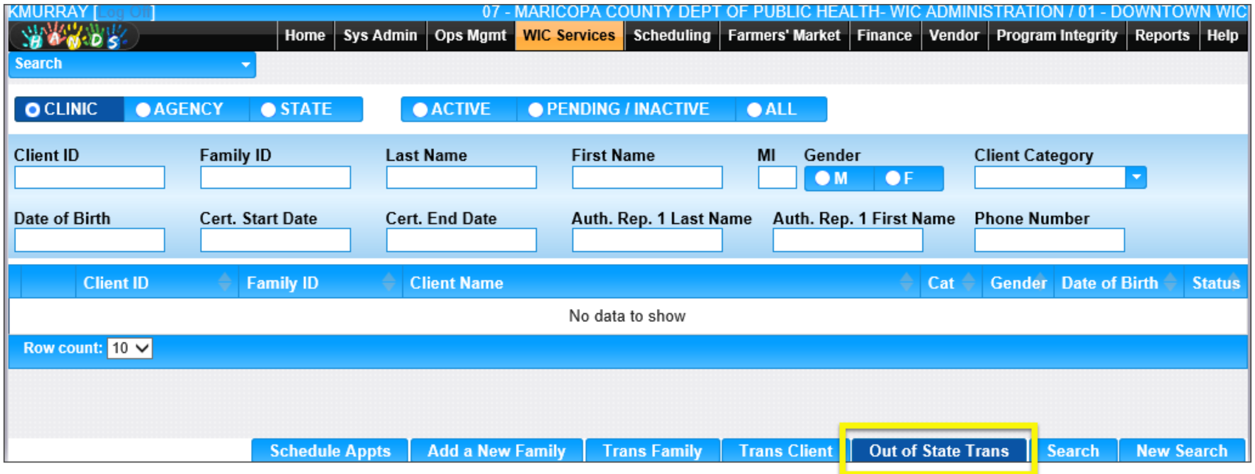


Figure 108: Out-of-State Transfer

9.2.1 Flow One: Transferred Client has never existed in the system

Narrative:

Clients being transferred into the system through this process will have a verification of certification (VOC) and a new family will have to be created for them. This process is started by either pressing the out-of-state trans button on the Client/Family Search page or selecting the out-of-state transfer page from the navigation drop down list. The user will be brought to the out-of-state transfer add a new Family page. The user will then be able to issue benefits to the Client after completing the Family, Client, Certification Action, and Food Package assignment pages.

NOTE: User must be logged into a specific Clinic in order to begin this process.

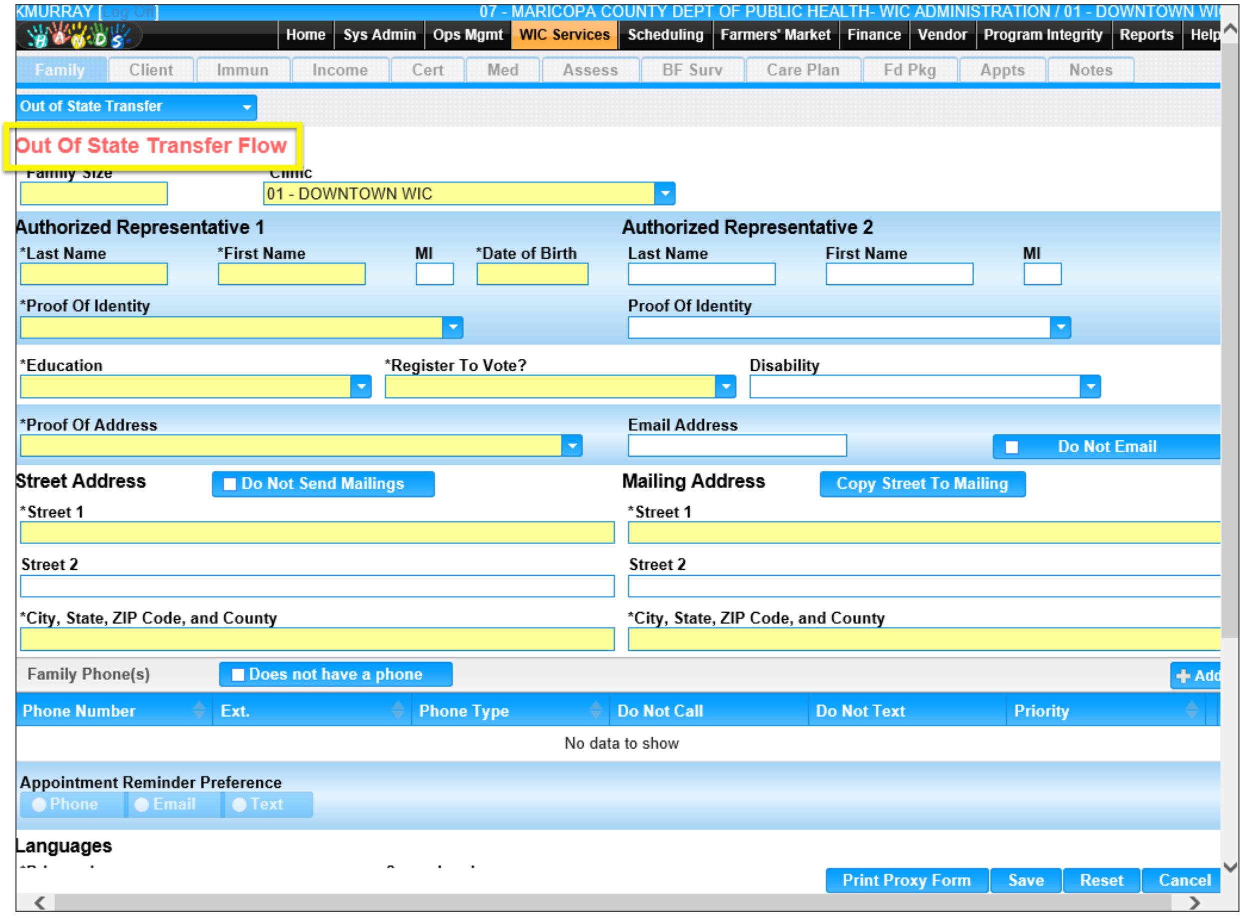


Figure 109: Add a New Family Page (Out-of State Transfer)

NOTE: The phrase Out Of State Transfer Flow will appear at the top of each page when performing an out-of-state transfer.

Fields:

- **Family Size –** The size of the Family. This field is mandatory. The Family size is used in the calucaltion to determine if the Client and or Family meet the income requirments for the WIC program. For more information, see the Income section of this document.

- **Clinic –** The organizational unit that serves as the Clinic that the Family is registered in. This field is mandatory and defaults to the logged in Clinic. Users are only able to add new families when logged into a specific Clinic.

- **Authorized Representative 1:**
  - **Last Name –** The last name of the first authorized representative. This field is mandatory.
  - **First Name –** The first name of the first authorized representative. This field is mandatory.
  - **MI –** The middle initial of the first authorized representative. This field is optional.

   - **Date of Birth –** The date of birth of the first authorized representative. This field is mandatory and stored in the format of MM/DD/YYYY. The user can either select the date from the calendar wizard provided or by manually entering the date. This field is mandatory.
   - **Proof Of Identity –** The proof of identity of the first authorized representative. This field is mandatory and is selected from a drop down list. For more information, see the Proof Identities base table section of this document.

- **Authorized Representative 2:**
   - **Last Name –** The last name of the second authorized representative. This field is mandatory if data is entered in any of the authorized representative two fields. Otherwise, this field is optional.
   - **First Name –** The first name of the second authorized representative. This field is optional.
   - **MI –** The middle initial of the second authorized representative. This field is optional.
   - **Proof Of Identity –** The proof of identity of the second authorized representative. This field is mandatory if data is entered in any of the authorized representative two fields. Otherwise, this field is optional. It is selected from a drop down list. For more information, see the Proof Identities base table section of this document.

- **Education –** The education level of the first authorized representative. This field is mandatory and selected from a drop down list. For more information, see the Education Levels base table section of this document.

- **Register To Vote? –** The voter registration status of the first authorized representative. This field is mandatory and selected from a drop down list. For more information, see the Voter Registrations base table section of this document.
- **Disability –** The disability of the first authorized. This field is optional and selected from a drop down list. For more information, see the Disabilities base table section of this document.

- **Proof Of Address –** The proof of address of the first authorized representative. This field is mandatory and selected from a drop down list. For more information, see the Proof of Address base table section of this document.

- **Email Address –** The email address of the first authorized representative. This field is optional.

- **Do Not Email –** A checkbox to determine if the Family wishes to receive emails. If the checkbox is checked then the Family does not wish to receive any emails. If the checkbox is unchecked, then the Family agrees to receive emails.

- **Do Not Send Mailings –** A checkbox to determine if the Family wishes to receive mailings to the first addresses listed. If the checkbox is checked then the Family does not wish to receive any mailings. If the checkbox is unchecked, then the Family agrees to receive mailings.

- **Street Address:**
  - **Street 1 –** The first street address of the Family. This field is mandatory.
  - **Street 2 –** The second street address of the Family. This field is optional.
  - **City, State, ZIP Code, and County –** The City, State, ZIP Code, and County combination for the first street address of the Family. This field is mandatory and selected from a drop down list. Any portion of this field (i.e. State or ZIP Code) can be manually entered. Possible field values will be available for selection within the drop down as characters are entered. For more information, see the GEO Location base table section of this document.

- **Mailing Address:**
  - **Street 1 –** The first mailing address of the Family. This field is mandatory.
  - **Street 2 –** The second mailing address of the Family. This field is mandatory.
  - **City, State, ZIP Code, and County –** The City, State, ZIP Code, and County combination for the first mailing address of the Family. This field is mandatory and selected from a drop down list. Any portion of this field (i.e. State or ZIP Code) can be manually entered. Possible field values will be available for selection within the drop down as characters are entered. For more information, see the GEO Location base table section of this document.

- **Family Phone(s) Grid:** A grid used to display all phone numbers listed for the Family.
  - **Phone Number –** The ten digit number listed. This field is display only.
  - **Ext. –** The extension of the number listed. This field is display only.
  - **Phone Type –** The type of the number listed. This field is display only.
  - **Do Not Call –** A checkbox to determine if user can call the phone number listed. This field is display only. If the checkbox is checked then the user cannot call the Family using this number. If the checkbox is unchecked, then the user can call the Family using this number.
  - **Do Not Text –** A checkbox to determine if user can text the phone number listed. This field is display only. If the checkbox is checked then the user cannot text the Family using this number. If the checkbox is unchecked, then the user is allowed to text the Family using this number.
  - **Priority –** The priority of the phone number listed. This field is display only. At least one phone number must have the priority of primary.

- **Languages:**
  - **Primary Language –** The primary language of the first authorized representative. This field is mandatory, will default to English, and selected from a drop down list.
  - **Secondary Language –** The secondary language of the first authorized representative. This field is optional and selected from a drop down list.

  NOTE: For more information on languages, see the Languages base table section of this document.
  - **Interpreter Required –** A checkbox to determine if the Family requires an interpreter. If the checkbox is checked then an interpreter is required for the Family. If the checkbox is unchecked, then the Family does not require an

interpreter. The checkbox will only be enabled for selection if primary language is anything but English. This field is optional.

- **Proxy 1:**
  - **Last Name –** The last name of the first proxy for the Family. This field is mandatory if data is entered in any of the other proxy one fields. Otherwise, this field is optional.
  - **First Name –** The first name of the first proxy for the Family. This field is mandatory if data is entered in any of the other proxy one fields. Otherwise, this field is optional.
  - **MI –** The middle initial of the first proxy for the Family. This field is optional.
  - **Proof Of Identity –** The proof of identity of the first proxy for the Family. This field is mandatory if data is entered in any of the other proxy one fields. Otherwise, this field is optional. It is selected from a drop down list. For more information, see the Proof Identities base table section of this document.

- **Proxy 2:**
  - **Last Name –** The last name of the second proxy for the Family. This field is mandatory if data is entered in any of the other proxy two fields. Otherwise, this field is optional
  - **First Name –** The first name of the second proxy for the Family. This field is mandatory if data is entered in any of the other proxy two fields. Otherwise, this field is optional.
  - **MI –** The middle initial of the second proxy for the Family. This field is optional.
  - **Proof Of Identity -** The proof of identity of the second proxy for the Family. This field is mandatory if data is entered in any of the other proxy two fields. Otherwise, this field is optional. It is selected from a drop down list. For more information, see the Proof Identities base table section of this document.

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

Buttons:
- **Copy Street To Mailing –** Click the copy street to mailing button to overwrite entered data in the mailing address fields with the exact data entered in the street address fields. After the button is clicked additional changes made to the street address fields will not be reflected in the mailing address fields unless the button is clicked again.
- **Family Phone(s) Grid:**
  - **Does not have a phone –** A checkbox to determine if the Family does not have a phone. If the checkbox is checked the Family does not have a phone and the add button will be greyed out. The checking of this checkbox will allow the user to

save the page without entering a phone number with a primary priority. If the checkbox is unchecked, then a phone number with a primary priority is mandatory.

- 

(Add) – Click the Add button to display the add modal and add records to the Family Phones(s) grid.

Navigation Path: WIC Services tab | Client/Family Search | Add a New Family Information | Add a Phone Number

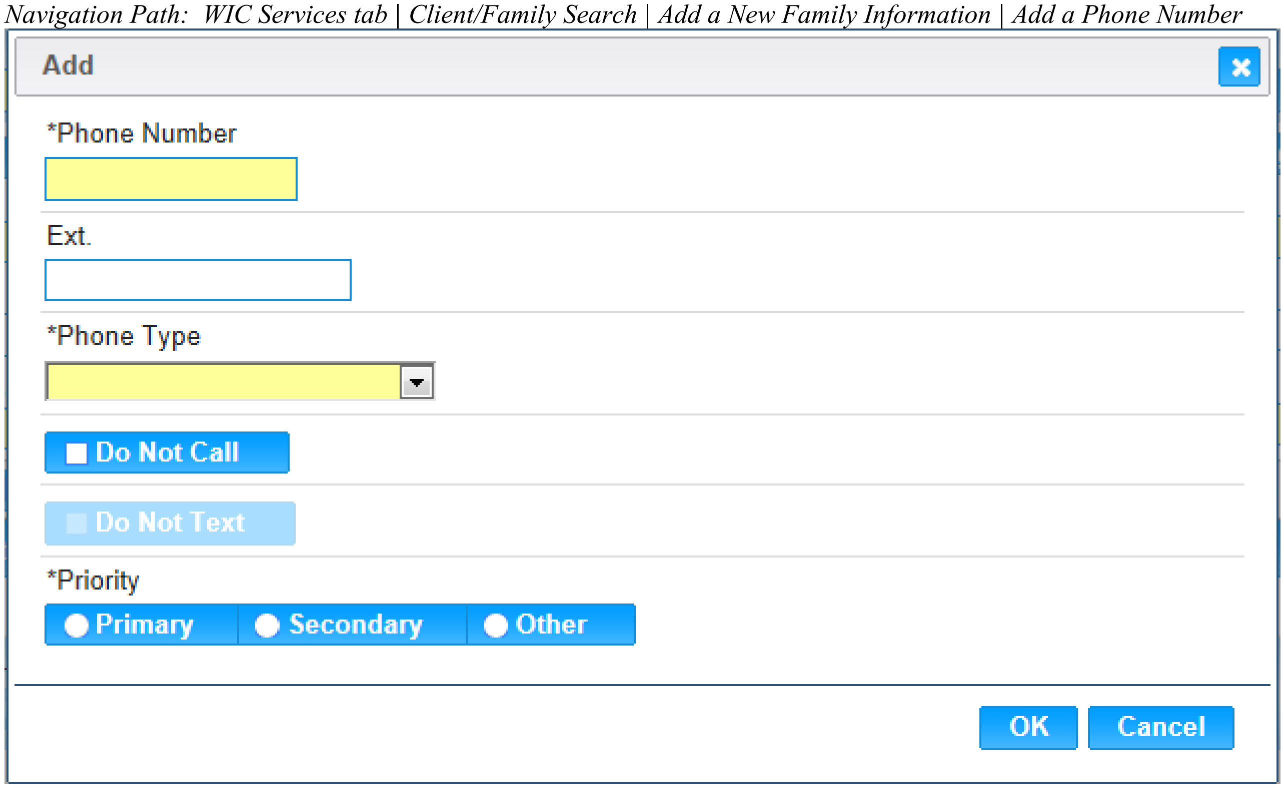


Figure 110: Add a Phone Modal

Fields (Add a Phone Modal):

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

for the Family must have the priority of primary. After the button is clicked additional changes made to the street address fields will not be reflected in the mailing address fields unless the button is clicked again.

Buttons (Add a Phone Modal):

- **OK** – Press this button to close the modal and add a new unsaved record to grid.
- **Cancel** – Press this button to close the modal without adding a new record to the grid.
- **(Close Window)** – The modal is closed without adding a new record to the grid.
- **(Edit Icon)** – Press this button to open the edit page to allow for desired modifications to an existing record.
- **(Delete Icon)** – Press this button to remove an existing record.
  NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Appointment Reminder Preference** – Selection options (Phone, Email, and Text) to determine the Family's appointment reminder preference. This field is optional. For more information, see the Appointment Scheduler DFDD.
- **How did you hear about WIC? Grid:**
  - Add **(Add)** – Click the Add button to display the add modal to add records to the How did you hear about WIC? grid.

Navigation Path: WIC Services tab | Client/Family Search | Add a New Family Information | Add a How did you hear about WIC?

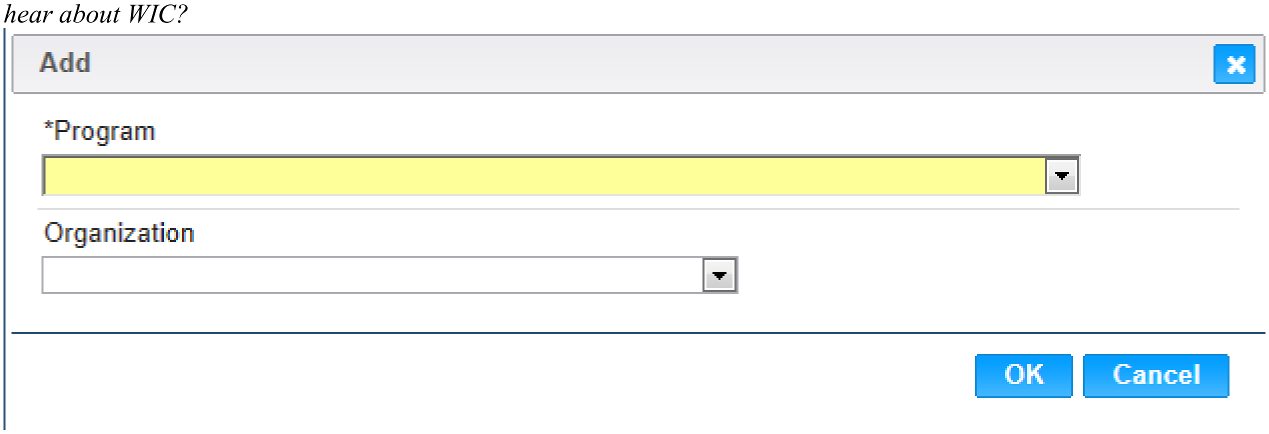


Figure 111: Add a How did you hear about WIC? Modal

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

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

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

- **OK** – Press this button to close the modal and add a new unsaved record to grid.

- **Cancel –** Press this button to close the modal without a new record being added to the grid.
- **(Close Window) –** The modal is closed without adding a new record to the grid.
- **(Edit Icon) –** Press this button to open the edit page to allow for desired modifications to an existing record.
- **(Delete Icon) –** Press this button to remove an existing record.
  NOTE: Edit and Delete changes will not become permanent until the page is saved.

- **Print Proxy Form –** Press this button to populate the WIC proxy form modal. For more information, see the Forms section of this document.
- **Save –** Press this button to save changes made to the page. For more information, see background process number four.
- **Reset –** Press this button to return the page to its original state without any changes being saved.
- **Cancel –** Press this button to close the page and return the user to the Client/Family Search page without a new Family record being added to the system.

Calculation(s): None

Background Processes:

1) A user may enter only one number with the priority of primary and one as secondary. As many numbers as desired may be entered that have a priority of other.
2) The phone appointment reminder preference option will be disabled if no phone number is listed or the do not call checkbox is checked for all numbers listed for the Family. The email option will be disabled if no email address is entered or the do not email checkbox is checked for the Family. The text option will be disabled if no number exists with the phone type of cell phone or the do not text checkbox is checked for the Family.
3) The majority of forms for Arizona will be in both English and Spanish. If populated while in a Client record, forms will populate in the primary language of the Family (Spanish or English only). If the primary language is something other than Spanish or English, the default language will be English. For more information, see the Forms section of this document.
4) The system performs a four step save process when saving a new Family:
    a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
    b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
    c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.

d. Finally, after the other three steps have been completed successfully the system assigns a unique system generated Family ID to the Family and adds the Family data to the database. The Family ID format is FY9999999. The first two digits are dependent on the fiscal year from the Budgeting Factors table. The remaining seven digits are a unique system generated sequence that is incremented by one after each new Family creation. For more information, see the Budgeting Factors section of the FNS-798 DFDD.
NOTE: If the Budgeting Factor table for the current fiscal year is not configured the creation of the Family ID will fail.

NOTE: For information on editing, see the Edit a Family Page section of this document.

9.2.1.1 Out-of-State Transfer Client Registration Page (Add a New Client Page)

Narrative:

The purpose of this page is to start the process to enroll new Clients into the WIC program. The Client Registration page is used to record general information about a potential Client. This general information includes personal information such as last name, first name, and date of birth along with ethnicity and racial information about a potential Client.

The Client Registration page is displayed when the New Client button is pressed on either the Family Information page or Client Information page. After all mandatory fields are filled out on the Client Registration page and the save button is pressed the new Client will be assigned a Client ID and added to the Family from which the process of creating a new Client was started.

Navigation Path: WIC Services tab | Client/Family Search | Out-of-State Transfer | New Client

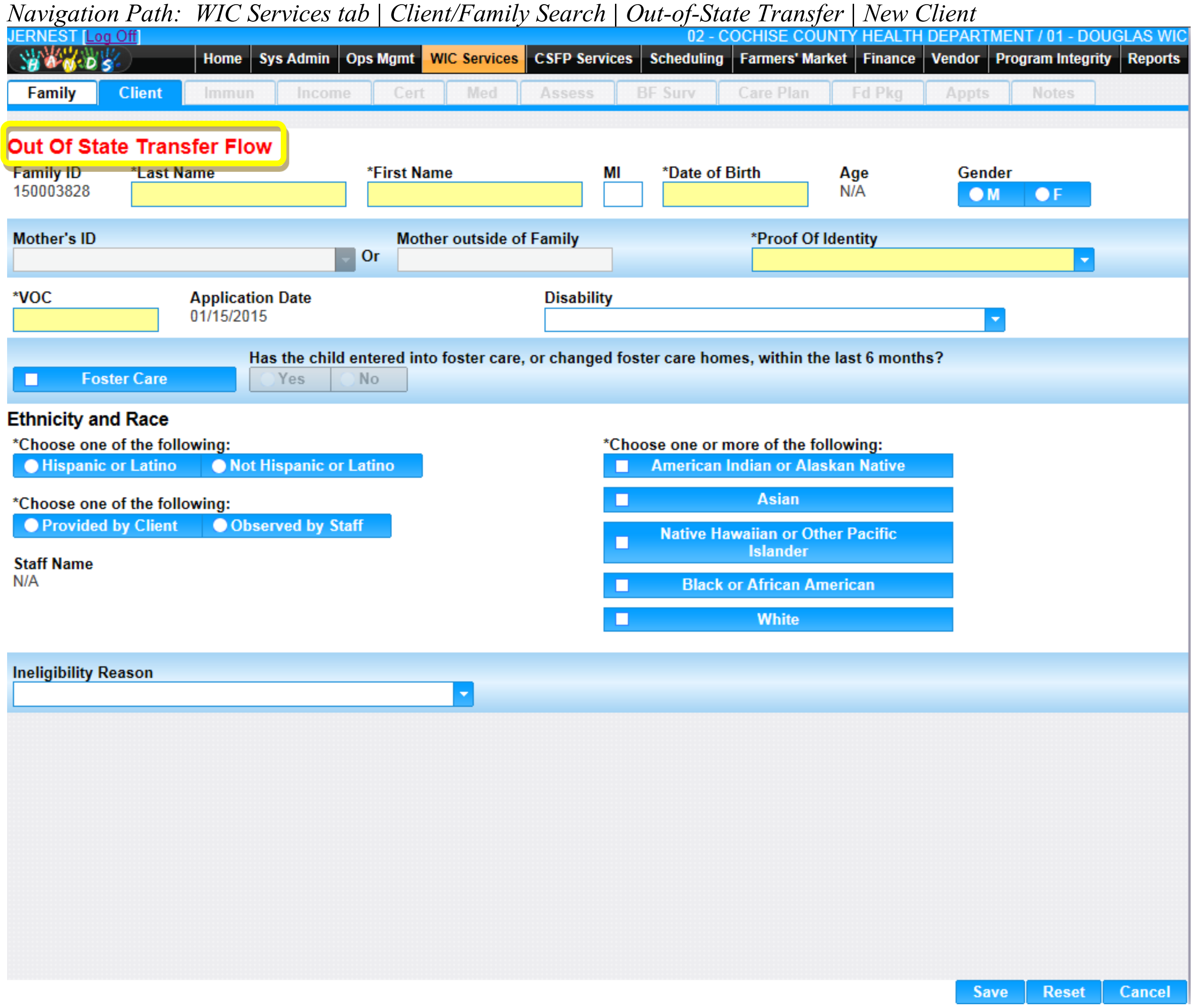


Figure 112: Client Registration (Out-of-State Transfer)

Fields:

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

disabled after a certification record has been saved for the Client on the Certification Action page.

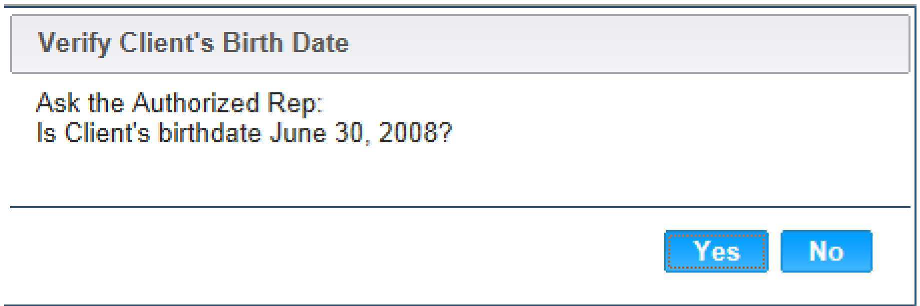


Figure 113: Verification of Client's Birth Date Modal

- **Age –** The calculated age of the Client. This field is display only and populates based on the date of birth entered. The format of the field is years followed by months. For more information, see calculation number one.
- **Mother ID –** The Client ID of the mother's record within the same Family ID as the Client. This field is optional and selected from a drop down list. This field will be disabled for Clients over the age of six. For more information, see background process number two.
- **Mother outside of Family –** The Client ID of the mother's record outside of the Family ID of the Client. This field is optional. For more information, see background process number three.
- **Proof of Identity –** The proof of identity of the Client. This field is mandatory and is selected from a drop down list. For more information, see the Proof Identities base table section of this document.
- **VOC –** The verification of certification for an out of state transfer Client. This field is mandatory.
- **Application Date –** The date in which the Client Registration process was started. This field is display only and populates in the format of MM/DD/YYYY.

- **Disability –** The disability of the Client. This field is optional and selected from a drop down list. For more information, see the Disabilities base table section of this document.

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

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

- **Ineligibility Reason –** The ineligibility reason of the Client. This field is optional and selected from a drop down list. For more information, see the Termination section of this document. The ineligibility reason field will be disabled once the Client has a complete assessment and becomes active. For more information, see the Care Plan section in the Nutrition Education DFDD.

Buttons:

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

- **Ethnicity and Race***:*
  - **Ethnicity –** Selection options (Hispanic or Latino and Not Hispanic or Latino) to determine the ethnicity of the Client. This field is mandatory.
  - **Race –** Checkboxes to determine the race of the Client. It is mandatory that at least one of the checkboxes is selected. The options are: American Indian or Alaskan Native, Asian, Native Hawaiian or Other Pacific Islander, Black or African American, and White.
  - **Origins –** The origins field is used to determine the origin of the Client. This field is optional and selected from a drop down list. One, multiple, or all of the options in the drop down list can be selected. The State Agency has the ability to turn this field on and off. For more information, see the State Application Settings section of the System Administration DFDD.
  - **Provided/Observed –** Selection options (Provided by Client and Observed by Staff) to determine how the Ethnicity and Race information was obtained. This field is mandatory. Selecting the option of Observed by Staff will populate the staff name field with the logged in username.
  - **Staff Name –** The staff name field displays the logged in username. This field is display only. The staff name field will only be populated with the logged in username if the Observed by Staff option is selected. If the Provided by Client option is selected, then the staff name field will display N/A.

- **Save –** Press this button to save changes made to the page. For more information, see background process number four.

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

- **Cancel –** Press this button to close the Client Registration page and return the user either the Family Information page or the Client Information page depending on which page the New Client button was pressed on.

Calculations:

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

Background Processes:

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

Figure 114: Males older than 5 error message

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

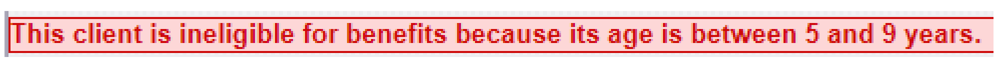


Figure 115: Females older than 5 error message

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

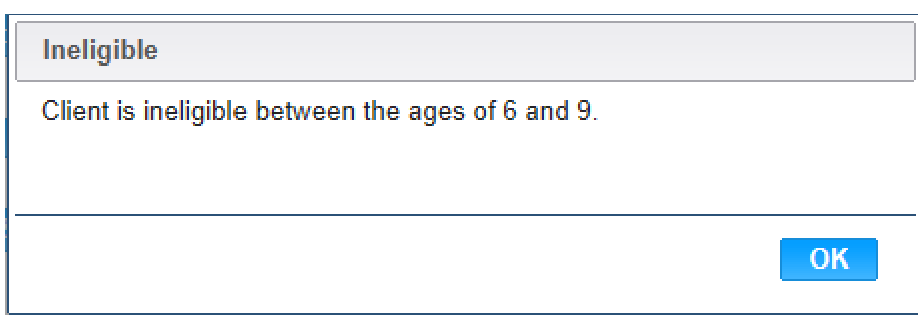


Figure 116: Ineligible between the ages of 6 and 9 Modal

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

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

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

4) The system performs a six step save process when saving a new Client:
    a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
    b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
    c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
    d. Fourth, it ensures that the Client is eligible to be saved base on the Clients date of birth. For more information, see background process number one.
    e. Fifth, it checks to see if the Client is a possible dual enrollment. For more information, see the Dual Enrollment section of this document.
    f. Finally, after the other five steps have been completed successfully the system assigns a unique system generated Client ID to the Client and adds the Client data to the database. The Client ID format is CLLA9999999. The first two digits (CL) is the organizational code of the Clinic that the Client is being created in. The second two digits (LA) is the organizational code of the Local Agency that the Client is being created in. For more information on organizational codes, see the Organizational Units section of the Operations Management DFDD. The remaining seven digits are a unique system generated sequence that is incremented by one after each new Client creation. After the save process has been completed and the new Client has been assigned a Client ID, the Client will be within the Family record from which the process of creating a new Client was started. The user will be displayed on the new Clients, Client Information page and has the ability to update the entered data.

5) After the new Client has successfully been saved the certification action out-of-state transfer modal is displayed to the user. The user has the option to proceed and certify the newly created Client or add additional out-of-state transfer Clients to the Family.

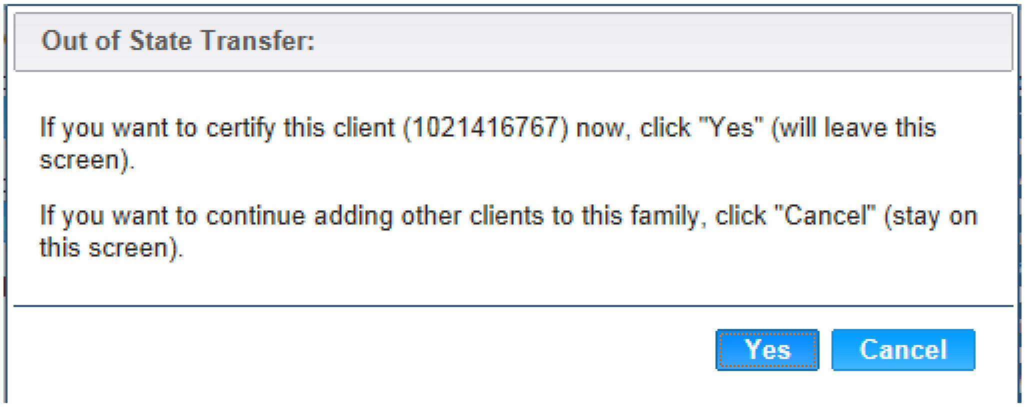


Figure 117: Certification Action Out-of-State Transfer modal

Buttons:

- **Yes –** Press this button to navigate to the certification action out-of-state transfer page. For more information, see the Certification Action Out-of-State Transfer section of this document.
- **Cancel –** Press this button to close the modal and return to the Client Information page. The user can then add more Clients to Family using the New Client button or navigate to other pages within the Client's record.

NOTE: For information on editing, see the Client Information section of this document.

9.2.1.2 Out-of-State Transfer Certification Action Page

Navigation Path: WIC Services tab | Client/Family Search | Out-of-State Transfer | Client Information | Certification Action

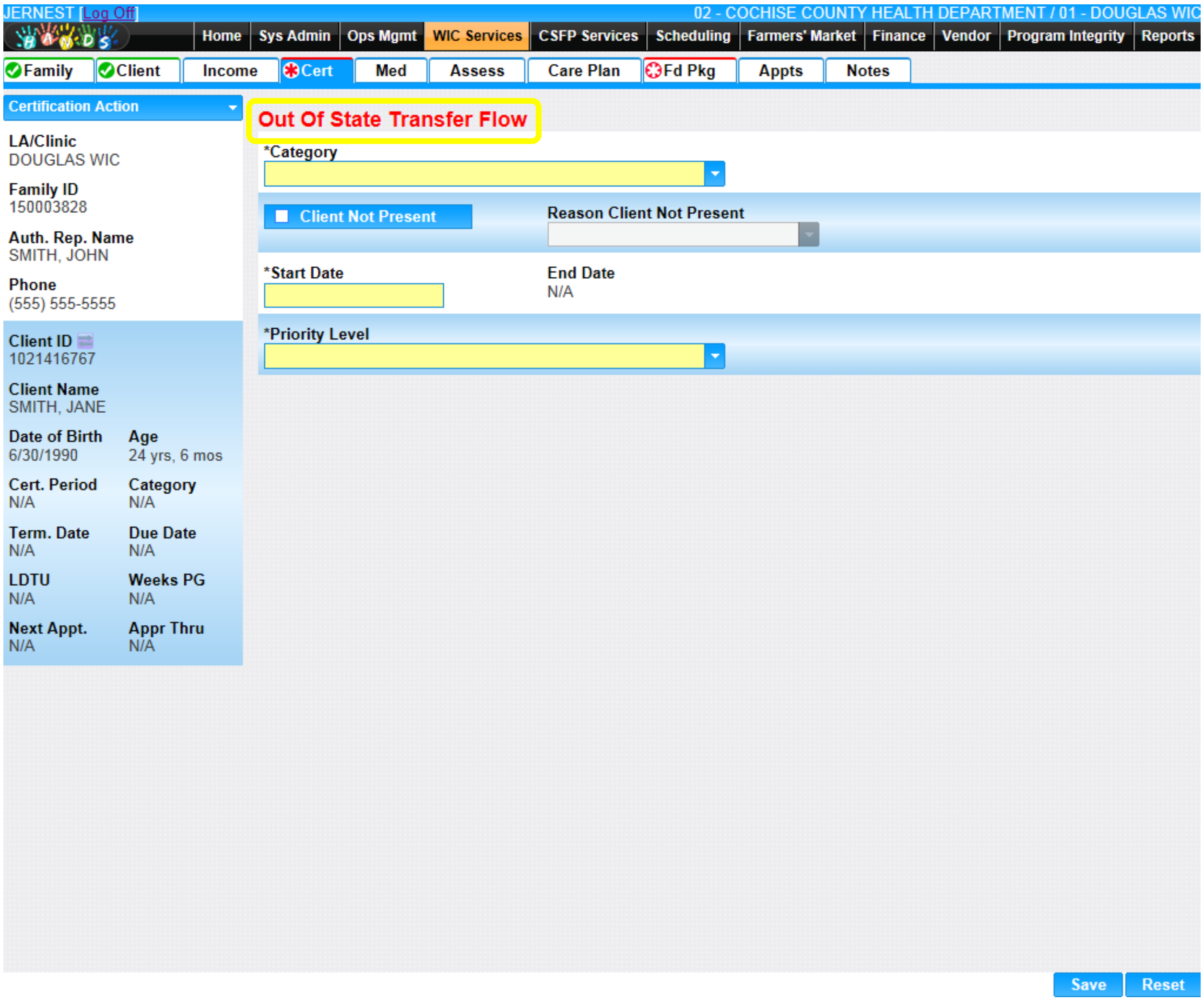


Figure 118: Certification Action (Out-of-State Transfer)

Fields:

- **Category –** The category of the Client. This field is mandatory and selected from a drop down list. Options in the drop down list will be filtered by the Client's age (For more information, see calculation number one). For more information, see the Categories base table section of this document.
- **Client Not Present –** A checkbox to determine if the Client being assigned a certification record is present. This field is optional. If the checkbox is checked then the Client was not present for the certification. If the checkbox is unchecked, then the Client was present for the certification.
- **Reason Client Not Present –** The reason that the Client was not present at the time the certification was being assigned. This field is mandatory if the Client not present checkbox is checked. If the Client not present checkbox is unchecked, then this field is disabled.
- **Expected Delivery Date –** The expected delivery date of the Client. This field is mandatory and will only display if Client category is PG1 or PG2. The field is stored in

the format MM/DD/YYY. The expected delivery date field must be after today's date and before today's date plus eleven months.

- **Actual Delivery Date** – The actual delivery date of the Client. This field is mandatory and will only display if Client category is EN, PN, PN+, or P. The field is stored in the format MM/DD/YYY. The actual delivery date cannot be after today's date. The actual delivery date must be within six months of today's date if Client category is P. The actual delivery date must be within one year of the today's date if Client category is EN, PN, or PN+.
- **Start Date** – The certification start date for the Client's new certification record. This field is mandatory and does not accept future or today's date. The field is stored in the format MM/DD/YYY.
- **End Date** – This certification end date for the Client's certification record. This field is display only and is calculated based on the Client's category and the certification start date entered. The expected delivery date field must have data entered before the certification end date can be calculated if Client category is either PG1 or PG2. The actual delivery date field must have data entered before the certification end date can be calculated if Client category is EN, PN, PN+, or P. The certification end date must be greater than the certification start date. For more information, see calculation number two. The field is stored in the format MM/DD/YYY.
- **Priority** – The priority that has been assigned to the Client. This field is mandatory and selected from a drop down list. This will be on the VOC form that the Client has come into the Clinic with. The WIC Codes assigned to the Client determine the Client's priority. The WIC Code that is assigned to the Client with the highest priority will make the Client that priority. For more information on Priority, see the Care Plan section of the Nutrition Education DFDD.

Buttons:

- **Save –** Press this button to save changes made to the page. For more information, see background process number one.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) The category drop down list is filtered based on the Client's age at the time of the certification start date. The following table is used to calculate Client categories:

Age:	Category Must be:
>= 0 and < 12 months	Infant Categories
>= 12 and < 24 months	C1
>= 24 and < 36 months	C2
>= 36 and < 48 months	C3
>= 48 and < 60 months	C4
>= 60 and < 72 months	C5
>= 9 and < 60 years	Women Categories

2) The certification end date field is populated based on the Client's age, certification category, and certification start date. The following table is used to calculate the certification end date.

Client Category:	Certification End Date Calculation:
Pregnant (PG1, PG2)	Expected Delivery Date + 42 days
Postpartum (P)	(Actual Delivery Date + 6 months) - 1 day
Breastfeeding (EN, PN, PN+)	(Actual Delivery Date + 12 months) - 1 day
Infants (IEN, IPN, IPN+, IFF)	One day prior to Client's 1st birthday
Children (C1, C2, C3, C4)	Cert Start Date + 12 months (or for C4- Last day of the Month child turns 5 yrs)

NOTE: If the C4 Client is 4.5 years or older on the day when the transfer occurs the certification end date will be the lesser of the below two options:

1) *Cert End Date = Cert Start Date + 6 months*
2) *Cert End Date = The last day of the month, in which the Client turns 5 years old*

Background Processes:

1) The system performs a four step save process when saving a new certification record:
    a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
    b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
    c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
    d. Finally, after the other steps have been completed without issue, it successfully saves the page and adds the data to the database. The Client's certification record will be displayed in the certifications grid. The user will be able to edit the current certification record on the page until the complete assessment button has been pressed or food benefits have been issued. (For more information, see both the Care Plan section of the Nutrition Education DFDD and the Issuance section of the Food Package LA DFDD) If the user has not completed the assessment or issued food benefits the end of day process will lock the certification action page (For more information, see the EOD DFDD).

NOTE: After the out-of-state transfer certification action page has been saved the non-out-of-state transfer certification action page is used to display the saved data. For more information on editing the certification action page, see the Certification Action section of this document.
NOTE: Proof of Address on the Family page will be required to be updated along with Proof of Identity on the Client information page.

9.2.2 Flow Two: Transferred Client existed in the system to begin with

Narrative:
Clients being transferred into the system through this process will have already had an existing Client/Family record within the system. If the out-of-state transfer client exists within another Clinic, then the one the user is currently in then the user must perform an in-state transfer first. The user will have to transfer the desired Client/Family into their Clinic using the in-state transfer process before performing an out-of-state transfer. An error message will be displayed to the user if trying to perform an out-of-state transfer on a Client that is not in the users logged in Clinic.

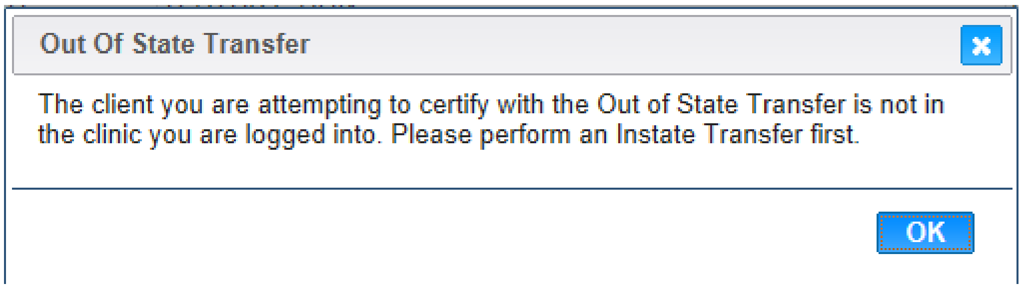


Figure 119: Client is not in your Clinic Modal

For more information on the in-state transfer process, see the In-State Transfer section of this document. Once the Client is in the users Clinic the out-of-state transfer process can begin. The user will start by searching for the desired Client/Family using the Client/Family Search page. The user will then select the desired Clients using the checkboxes in the grid. The final step is to press the out of state trans button to begin the out-of-state transfer process. The user will then be able to issue benefits to the Client after updating/completing the Family, Client, Certification Action, and Food Package assignment pages.
NOTE: An error message will be displayed to the user if trying to start the out-of-state transfer process for a Client within an active certification.

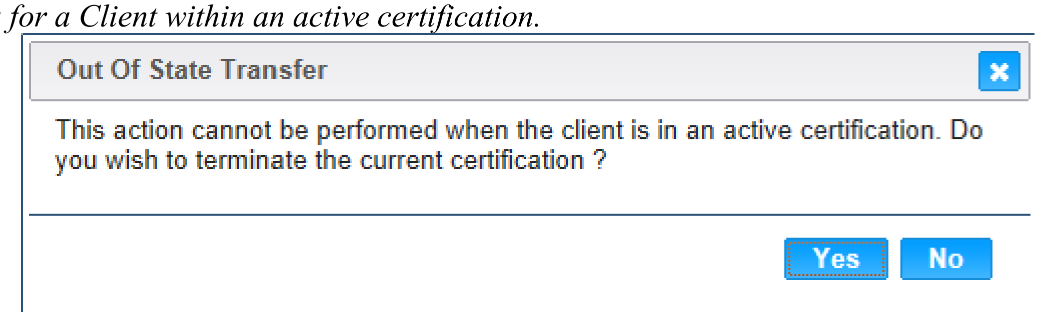


Figure 120: Client is not in an active certification

NOTE: In order for the user to perform the out-of-state transfer process for multiple existing Client's in the system they must individually repeat the process for each Client even if they exist within the same Family.

Buttons:

- **Yes –** Press this button to terminate the Client's current certification and proceed with the out-of-state process.
- **No –** Press this button to stop close the modal without anything being done to the Client's record.

Calculations: None

Background Processes:

1) When the Yes button is pressed the Client's, current certification will be terminated. The termination date will be set to today's date and the user will be brought to the out-of-state transfer Client information page

9.2.2.1 Out-of-State Transfer Client Information Page

Navigation Path: WIC Services tab | Client/Family Search | Out-of-State Transfer | Client Information

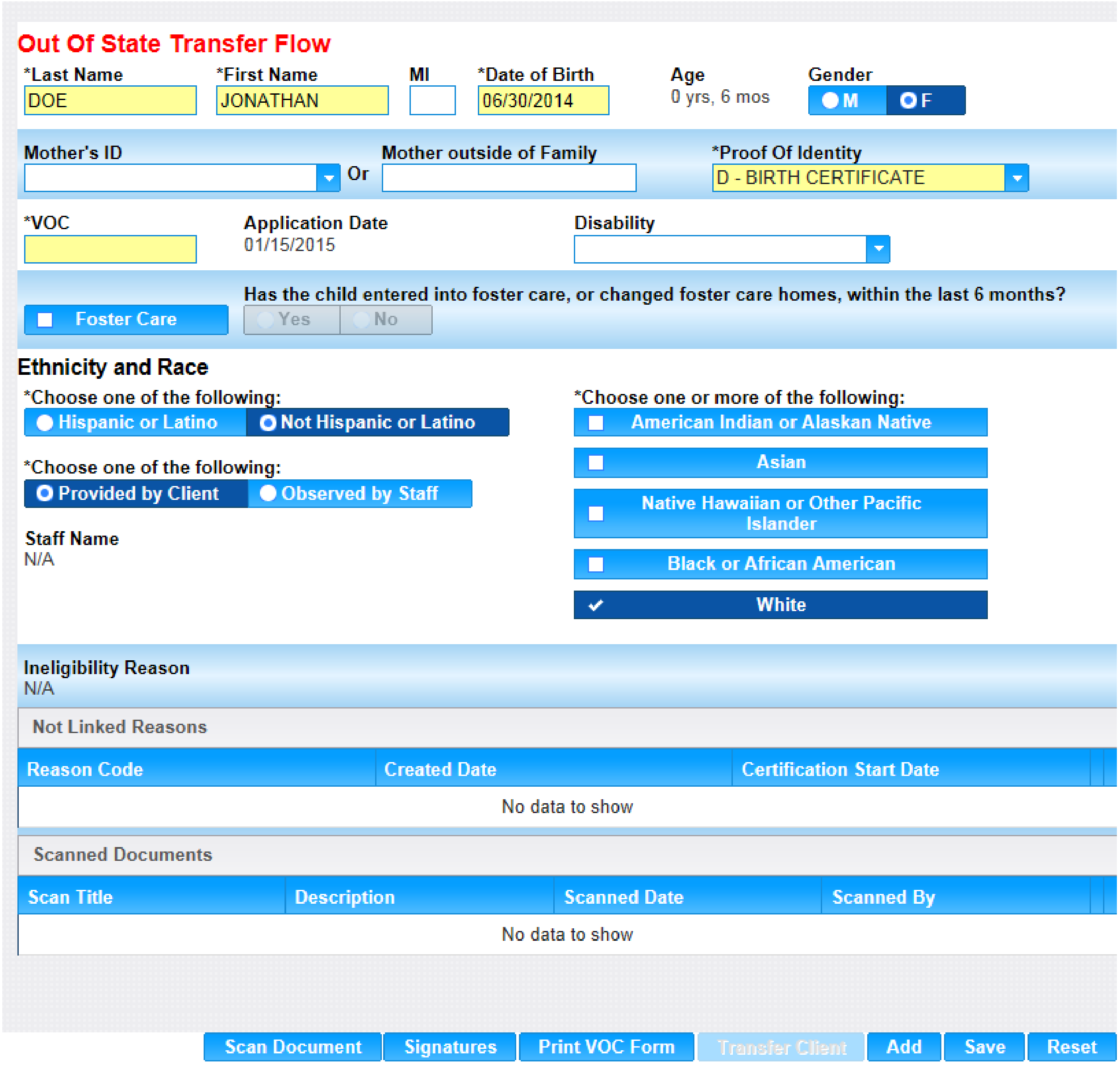


Figure 121: Client Information Page (Out-of-State Transfer)

NOTE: Information previously saved for the Client will be automatically populated on the Client information page. The user will have the ability to update the data.

Fields:

- **Family ID –** The unique, system generated identification number for the Family that was assigned when the Family was created. This field is display only.
- **Last Name –** The last name of the Client. This field is mandatory.
- **First Name –** The first name of the Client. This field is mandatory.
- **MI –** The middle initial of the Client. This field is optional.

- **Date of Birth –** The date of birth of the Client. This field is mandatory and stored in the format of MM/DD/YYYY. The user can either select the date from the calendar wizard provided or by manually entering the date. After the user enters a date of birth a verification modal will open to verify that the date of birth entered for the Client is correct. Pressing the Yes button will close the modal and allow the user to proceed with the Client Registration page. Pressing the No button will close the modal, clear the data entered in the date of birth field, and the user will be able to enter the correct date of birth which will start the process all over again. For more information, see background process number one. The date of birth fields becomes disabled after a certification record has been saved for the Client on the Certification Action page.

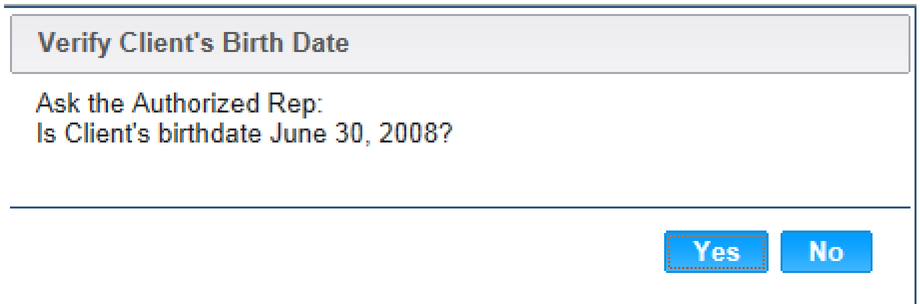


Figure 122: Verification of Client's Birth Date Modal

- **Age –** The calculated age of the Client. This field is display only and populates based on the date of birth entered. The format of the field is years followed by months. For more information, see calculation number one.

- **Mother ID –** The Client ID of the mother's record within the same Family ID as the Client. This field is optional and selected from a drop down list. This field will be disabled for Clients over the age of six. For more information, see background process number two.

- **Mother outside of Family –** The Client ID of the mother's record outside of the Family ID of the Client. This field is optional. For more information, see background process number three.

- **Proof of Identity –** The proof of identity of the Client. This field is mandatory and is selected from a drop down list. For more information, see the Proof Identities base table section of this document.

- **VOC –** The verification of certification for an out of state transfer Client. This field is mandatory.

- **Application Date –** The date in which the Client Registration process was started. This field is display only and populates in the format of MM/DD/YYYY.

- **Disability –** The disability of the Client. This field is optional and selected from a drop down list. For more information, see the Disabilities base table section of this document.

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

- **Ineligibility Reason –** The ineligibility reason of the Client. This field is optional and selected from a drop down list. For more information, see the Termination section of this document. The ineligibility reason field will be disabled once the Client has a complete assessment and becomes active. For more information, see the Care Plan section in the Nutrition Education DFDD.

Buttons:

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

- **Ethnicity and Race***:*
  - **Ethnicity –** Selection options (Hispanic or Latino and Not Hispanic or Latino) to determine the ethnicity of the Client. This field is mandatory.
  - **Race –** Checkboxes to determine the race of the Client. It is mandatory that at least one of the checkboxes is selected. The options are: American Indian or Alaskan Native, Asian, Native Hawaiian or Other Pacific Islander, Black or African American, and White.
  - **Origins –** The origins field is used to determine the origin of the Client. This field is optional and selected from a drop down list. One, multiple, or all of the options in the drop down list can be selected. The State Agency has the ability to turn this field on and off. For more information, see the State Application Settings section of the System Administration DFDD.
  - **Provided/Observed –** Selection options (Provided by Client and Observed by Staff) to determine how the Ethnicity and Race information was obtained. This field is mandatory. Selecting the option of Observed by Staff will populate the staff name field with the logged in username.
  - **Staff Name –** The staff name field displays the logged in username. This field is display only. The staff name field will only be populated with the logged in username if the Observed by Staff option is selected. If the Provided by Client option is selected then the staff name field will display N/A.

- **Save –** Press this button to save changes made to the page. For more information, see background process number four.

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

- **Cancel –** Press this button to close the Client Registration page and return the user either the Family Information page or the Client Information page depending on which page the New Client button was pressed on.

Calculations:

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

Background Processes:

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

    Males older than 5 cannot be registered in WIC.

    Figure 123: Males older than 5 error message

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

    This client is ineligible for benefits because its age is between 5 and 9 years.

    Figure 124: Females older than 5 error message

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

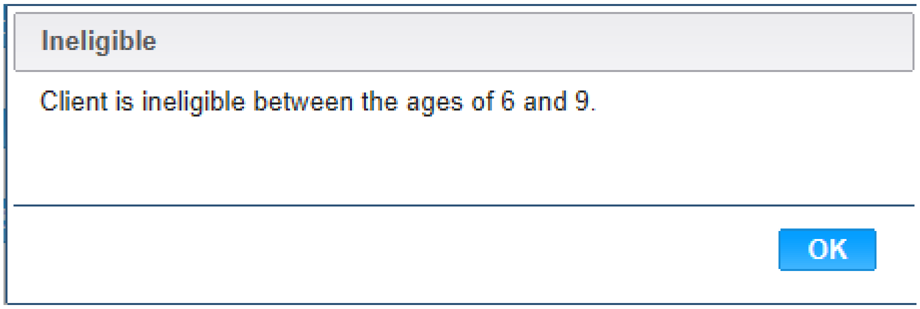


Figure 125: Ineligible between the ages of 6 and 9 Modal

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

2) Only Client IDs for mothers (females over the age of nine) who are within the Family ID will be populated in the Mother ID drop down list. This allows for the Client to be linked to a mother within the Client's Family.
3) The Mother outside of Family field allows the entry of any mother's (females over the age of nine) Client ID throughout the system. This allows for the Client to be linked to a mother outside of the Client's Family.
4) The system performs a six step save process when saving a new Client:
   a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
   b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
   c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
   d. Fourth, it ensures that the Client is eligible to be saved base on the Clients date of birth. For more information, see background process number one.
   e. Fifth, it checks to see if the Client is a possible dual enrollment. For more information, see the Dual Enrollment section of this document.
   f. Finally, after the other five steps have been completed successfully the system uses the Client's previously assigned Client ID to save all changes made to the database.
5) After the new Client has successfully been saved the certification action out-of-state transfer modal is displayed to the user. The user has the option to proceed and certify the newly created Client or add additional out-of-state transfer Clients to the Family.

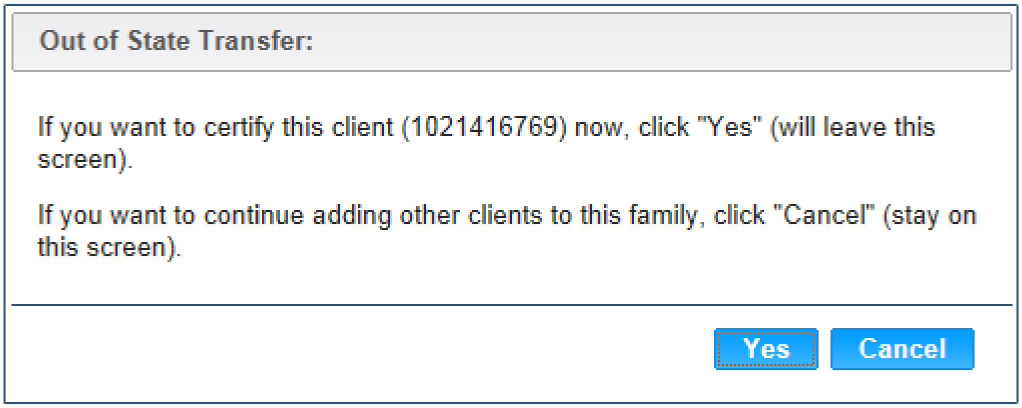


Figure 126: Certification Action Out-of-State Transfer modal

Buttons:

- **Yes –** Press this button to navigate to the certification action out-of-state transfer page. For more information, see the Certification Action Out-of-State Transfer section of this document.
- **Cancel –** Press this button to close the modal and return to the Client Information page. The user can then add more Clients to Family using the New Client button or navigate to other pages within the Client's record.

NOTE: For information on editing, see the Client Information section of this document.

9.2.2.2 Out-of-State Transfer Certification Action Page

Navigation Path: WIC Services tab | Client/Family Search | Out-of-State Transfer | Client Information | Certification Action

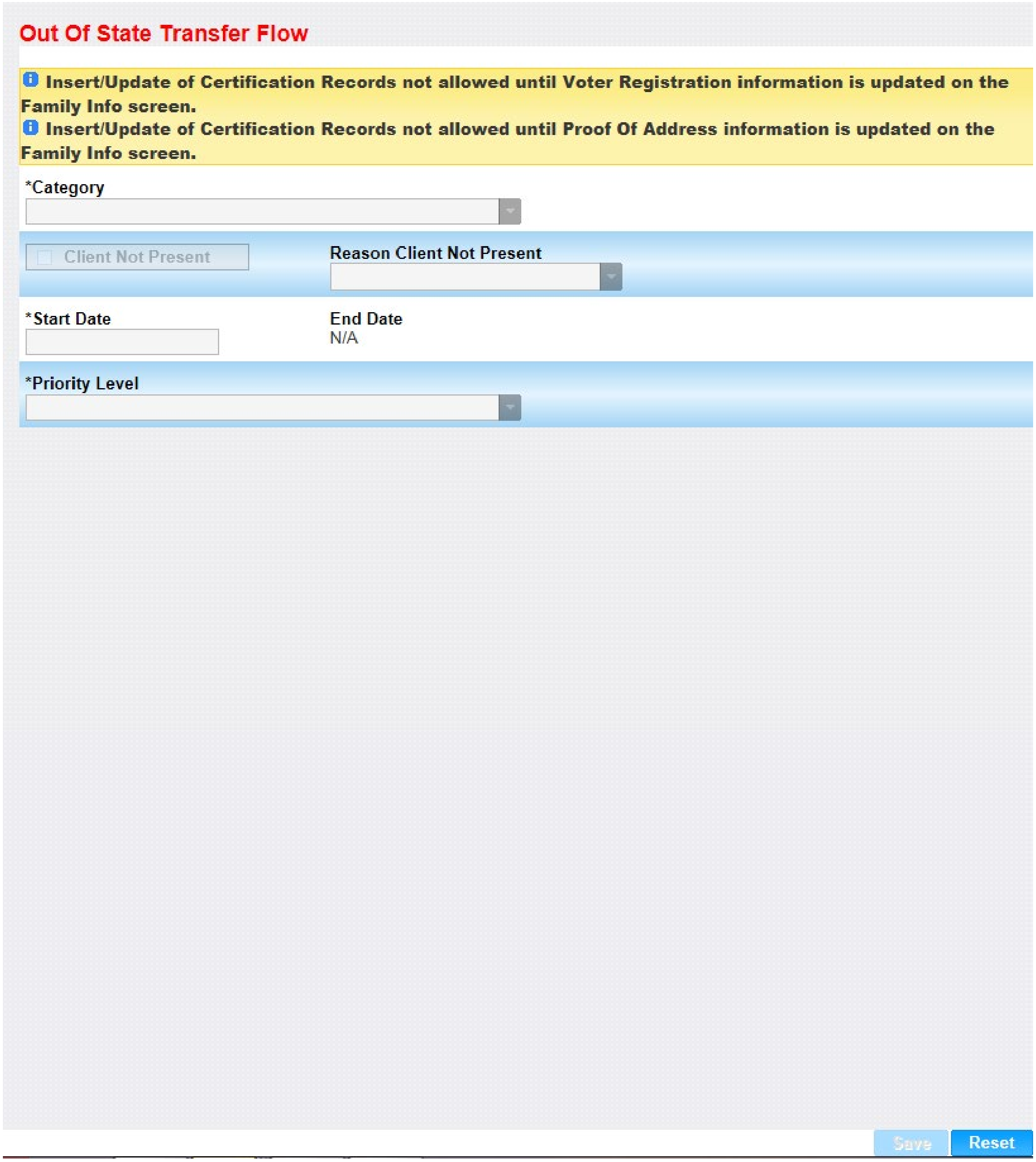


Figure 127: Certification Action (Out-of-State Transfer)

NOTE: The user will only be able to save the out-of-state transfer certification action page after information has been updated on the Family information and Client information pages.

Fields:

- **Category –** The category of the Client. This field is mandatory and selected from a drop down list. Options in the drop down list will be filtered by the Client's age (For more information, see calculation number one). For more information, see the Categories base table section of this document.

- **Client Not Present –** A checkbox to determine if the Client being assigned a certification record is present. This field is optional. If the checkbox is checked then the Client was not present for the certification. If the checkbox is unchecked, then the Client was present for the certification.

- **Reason Client Not Present –** The reason that the Client was not present at the time the certification was being assigned. This field is mandatory if the Client not present checkbox is checked. If the Client not present checkbox is unchecked, then this field is disabled.

- **Expected Delivery Date –** The expected delivery date of the Client. This field is mandatory and will only display if Client category is PG1 or PG2. The field is stored in the format MM/DD/YYY. The expected delivery date field must be after today's date and before today's date plus eleven months.

- **Actual Delivery Date** – The actual delivery date of the Client. This field is mandatory and will only display if Client category is EN, PN, PN+, or P. The field is stored in the format MM/DD/YYY. The actual delivery date cannot be after today's date. The actual delivery date must be within six months of today's date if Client category is P. The actual delivery date must be within one year of the today's date if Client category is EN, PN, or PN+.

- **Start Date** – The certification start date for the Client's new certification record. This field is mandatory and does not accept future or today's date. The field is stored in the format MM/DD/YYY.

- **End Date** – This certification end date for the Client's certification record. This field is display only and is calculated based on the Client's category and the certification start date entered. The expected delivery date field must have data entered before the certification end date can be calculated if Client category is either PG1 or PG2. The actual delivery date field must have data entered before the certification end date can be calculated if Client category is EN, PN, PN+, or P. The certification end date must be greater than the certification start date. For more information, see calculation number two. The field is stored in the format MM/DD/YYY.

- **Priority** – The priority that has been assigned to the Client. This field is mandatory and selected from a drop down list. This will be on the VOC form that the Client has come into the Clinic with. The WIC Codes assigned to the Client determine the Client's priority. The WIC Code that is assigned to the Client with the highest priority will make the Client that priority. For more information on Priority, see the Care Plan section of the Nutrition Education DFDD.

Buttons:

- **Save –** Press this button to save changes made to the page. For more information, see background process number one.
- **Reset –** Press this button to return the page to its original state without any changes being saved.

Calculations:

1) The category drop down list is filtered based on the Client's age at the time of the certification start date. The following table is used to calculate Client categories:

Age:	Category Must be:
>= 0 and < 12 months	Infant Categories
>= 12 and < 24 months	C1
>= 24 and < 36 months	C2
>= 36 and < 48 months	C3
>= 48 and < 60 months	C4
>= 60 and < 72 months	C5
>= 9 and < 60 years	Women Categories

2) The certification end date field is populated based on the Client's age, certification category, and certification start date. The following table is used to calculate the certification end date.

Client Category:	Certification End Date Calculation:
Pregnant (PG1, PG2)	Expected Delivery Date + 42 days
Postpartum (P)	(Actual Delivery Date + 6 months) - 1 day
Breastfeeding (EN, PN, PN+)	(Actual Delivery Date + 12 months) - 1 day
Infants (IEN, IPN, IPN+, IFF)	One day prior to Client's 1st birthday
Children (C1, C2, C3, C4)	Cert Start Date + 12 months

NOTE: If the C4 Client is 4.5 years or older on the day when the transfer occurs the certification end date will be the lesser of the below two options:

1) *Cert End Date = Cert Start Date + 6 months*
2) *Cert End Date = The last day of the month, in which the Client turns 5 years old*

Background Processes:

1) The system performs a four step save process when saving a new certification record:
   a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
   b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
   c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.

d. Finally, after the other steps have been completed without issue, it successfully saves the page and adds the data to the database. The Client's certification record will be displayed in the certifications grid. The user will be able to edit the current certification record on the page until the complete assessment button has been pressed or food benefits have been issued. (For more information, see both the Care Plan section of the Nutrition Education DFDD and the Issuance section of the Food Package LA DFDD) If the user has not completed the assessment or issued food benefits the end of day process will lock the certification action page (For more information, see the EOD DFDD).

2) When an out-of-state transfer is performed for an existing Client and a certification for that Client exists with a later certification start date, the end of day certification and associated date will be removed from the system.

NOTE: After the out-of-state transfer certification action page has been saved the non-out-of-state transfer certification action page is used to display the saved data. For more information on editing the certification action page, see the Certification Action section of this document.

NOTE: Proof of Address on the Family page will be required to be updated along with Proof of Identity on the Client information page.

9.3 eWIC to FI Transfer

9.3.1 Family Transfer

The following instructions provide the details and steps surrounding the process to transfer a family within an eWIC Clinic into an FI Clinic.

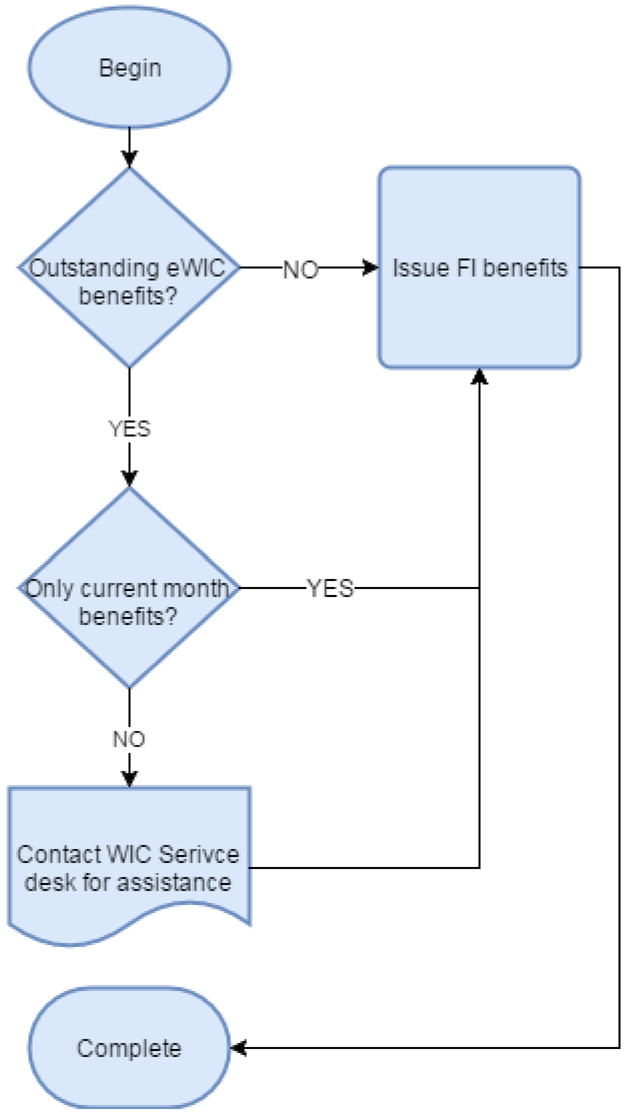


Figure 117: Overall eWIC to FI family transfer process

Use Case 1: No one within the family has current or future month eWIC benefits

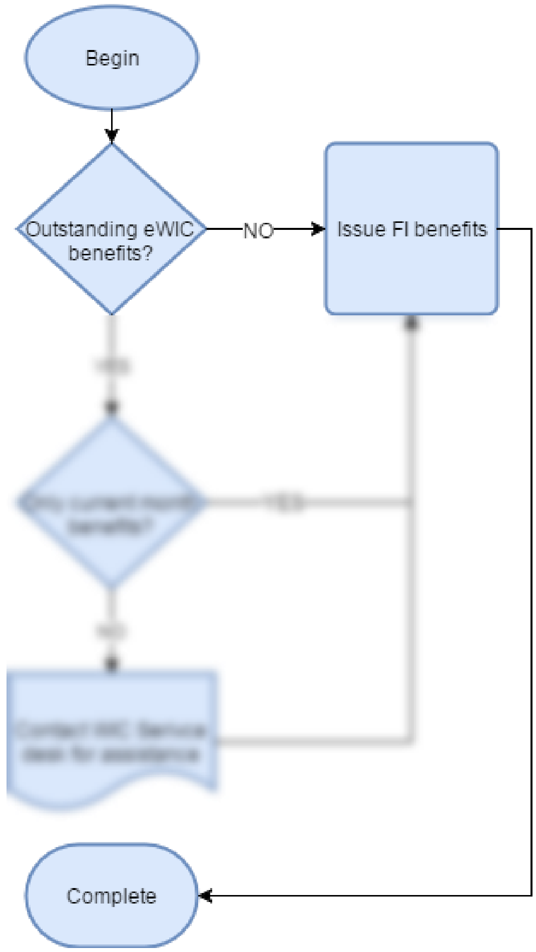


Figure 118: eWIC to FI family transfer process with no outstanding eWIC benefits

Steps:

1. Perform transfer process from eWIC Clinic to FI Clinic for entire family.
2. Assign desired food package via the food package assignment page.
3. Issue desired number of months of FI benefits via the Issuance screen.
4. Complete – client receives FI benefits starting in the current month.

Use Case 2: Family only has current month eWIC benefits

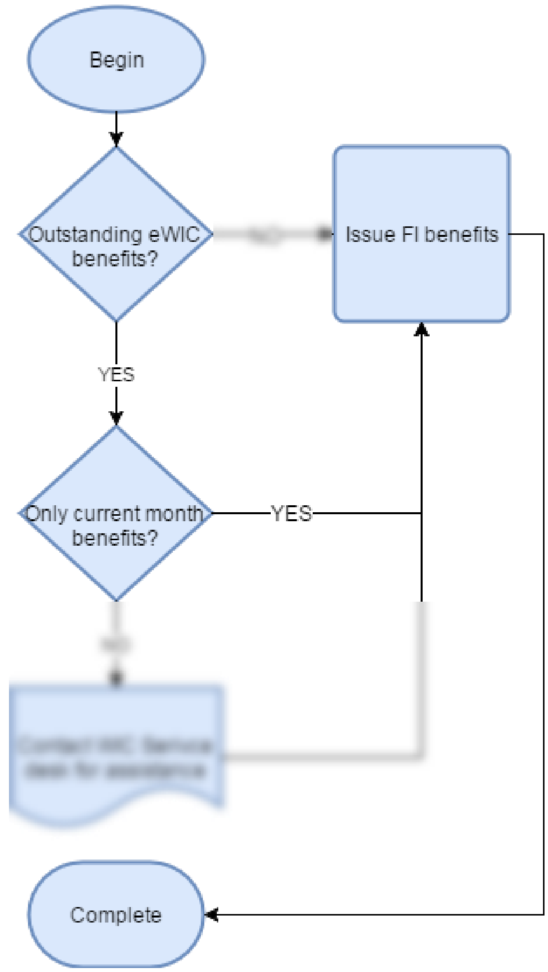


Figure 119: eWIC to FI family transfer process with only current month eWIC benefits

Steps:

5. Perform transfer process from eWIC Clinic to FI Clinic for entire family.
6. Assign desired food package via the food package assignment page.
7. Issue desired number of months of FI benefits via the Issuance screen.
8. Complete – clients within the family that have current month eWIC benefits will receive FI benefits starting next month with a FDTU continuing after the eWIC benefits LDTU. The clients within the family that do not have current month eWIC benefits will receive FI benefits starting in the current month and will have dates that sync up with family.

Use Case 3: Family has both future and current month eWIC benefits

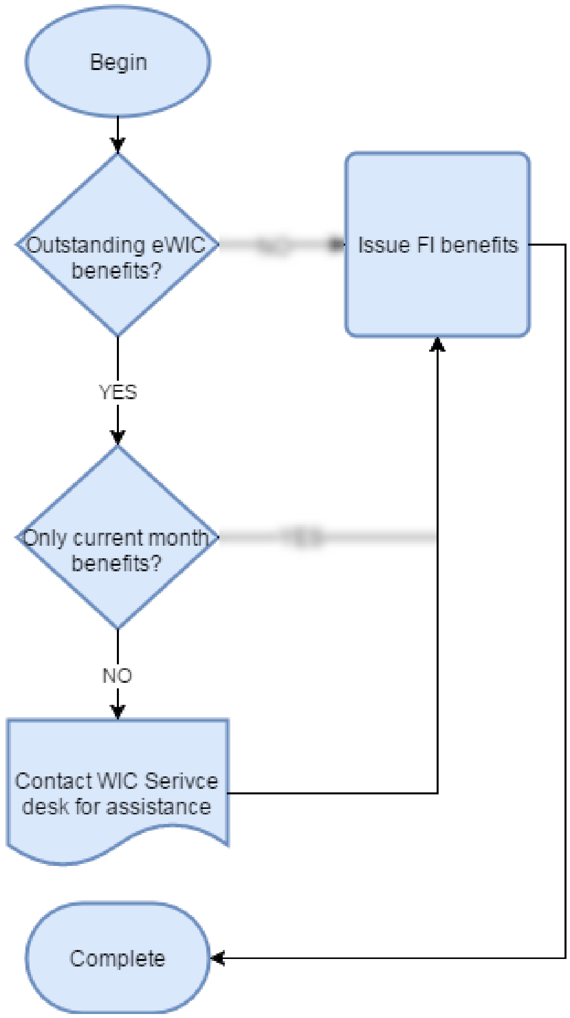


Figure 120: eWIC to FI family transfer process with future month eWIC benefits

Steps:

1. Perform transfer process from eWIC Clinic to FI Clinic for entire family.

An error message will display when the system attempts to complete the transfer process indicating that the family cannot be transferred as there are outstanding eWIC benefits and that the WIC Service desk needs to be contacted to complete the transfer.

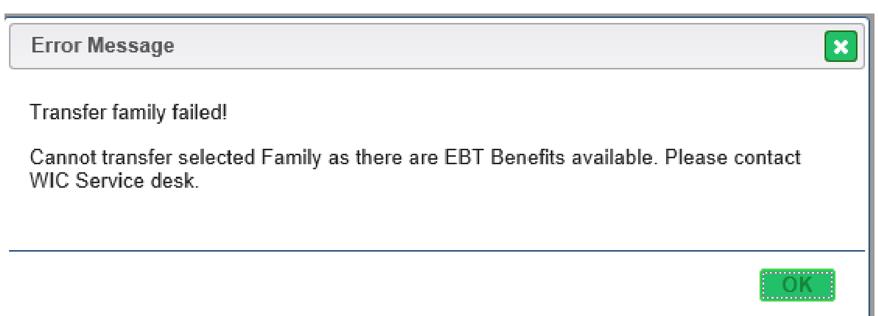


Figure 121: Outstanding eWIC Benefits Contact WIC Service desk window

The WIC Service desk will void the outstanding eWIC benefits and transfer the family to the user's FI Clinic. The user will continue with the following steps once they have been notified that the transfer has completed successfully.

2. Complete – clients within the family that have current month eWIC benefits will receive FI benefits starting next month with a FDTU continuing after the eWIC benefits LDTU. The clients within the family that do not have current month eWIC benefits will receive FI benefits starting in the current month and will have dates that sync up with family.

9.3.2 Client Transfer

The following instructions provide the details and steps surrounding the process to transfer a client within an eWIC Clinic into an FI Clinic.

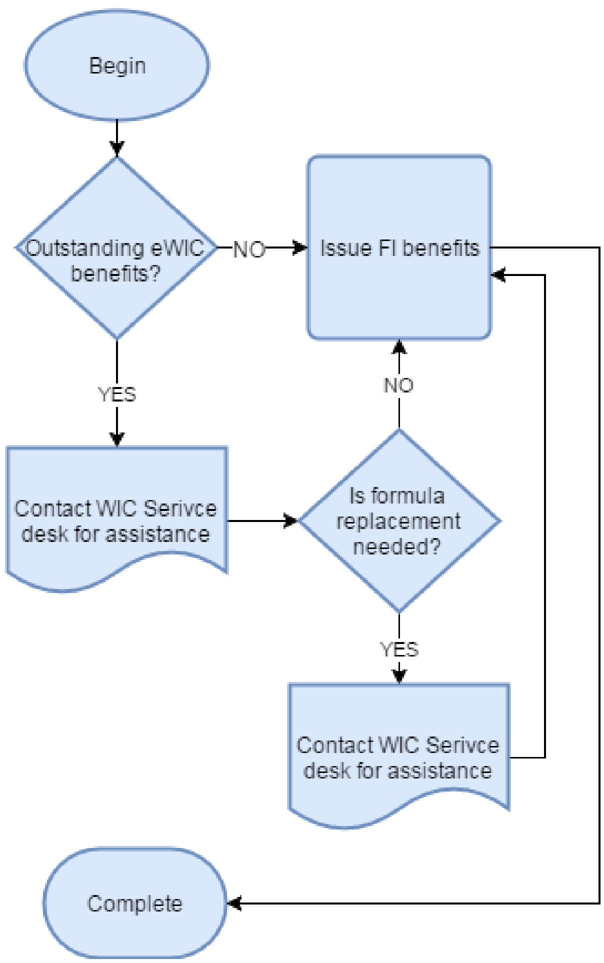


Figure 122: Overall eWIC to FI client transfer process

Use Case 1: Client does not have current or future month eWIC benefits

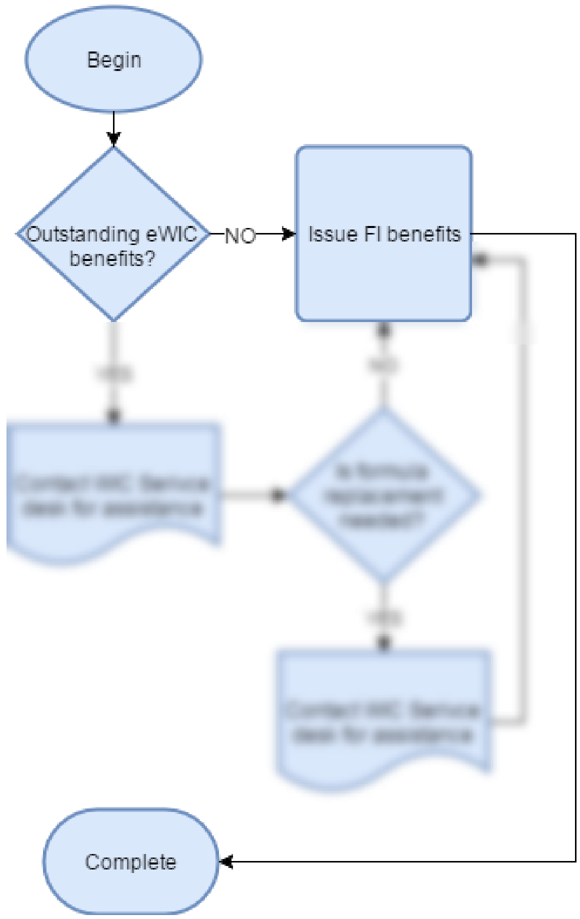


Figure 123: eWIC to FI client transfer process with no outstanding eWIC benefits

Steps:

1. Perform transfer process from eWIC Clinic to FI Clinic for the client.
2. Assign desired food package via the food package assignment page.
3. Issue desired number of months of FI benefits via the Issuance screen.
4. Complete – client receives FI benefits starting in the current month. A starter package will be issued to the client if necessary, to ensure a two-day gap doesn't occur if the new family's FDTU is different from the transferred client's.

Use Case 2: Client has outstanding eWIC benefits and current month formula replacement is not needed

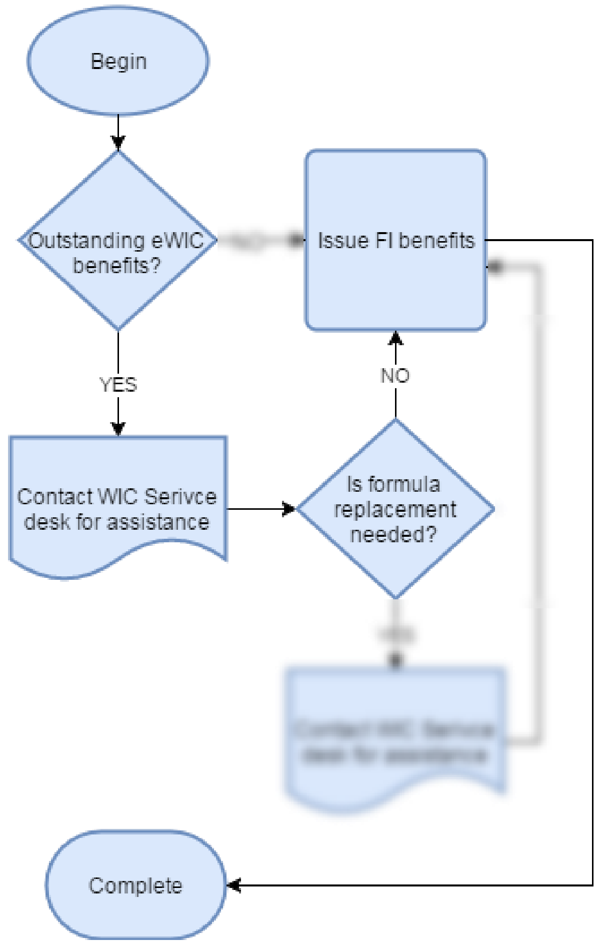


Figure 124: eWIC to FI client transfer process with current month eWIC benefits and no formula replacement needed

Steps:

1. Perform transfer process from eWIC Clinic to FI Clinic for the client.

An error message will display when the system attempts to complete the transfer process indicating that the client cannot be transferred as there are outstanding eWIC benefits and that the WIC Service desk needs to be contacted to complete the transfer.

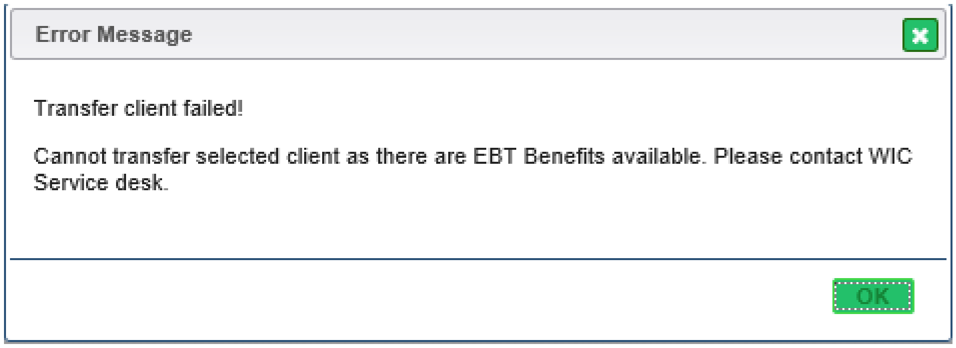


Figure 125: Outstanding eWIC Benefits Contact WIC Service desk window

The WIC Service desk will void the outstanding eWIC benefits and transfer the client to the user's FI Clinic. The user will continue with the following steps once they have been notified that the transfer has completed successfully.

2. Assign desired food package via the food package assignment page.
3. Issue desired number of months of FI benefits via the Issuance screen.
4. Complete – client receives FI benefits starting in the current month as they had not redeemed any of the current month eWIC benefits and therefore, had them voided. A starter package will be issued to the client if necessary, to ensure a two-day gap doesn't occur if the new family's FDTU is different from the transferred client's.

Use Case 3: Client has outstanding eWIC benefits and current month formula replacement is needed

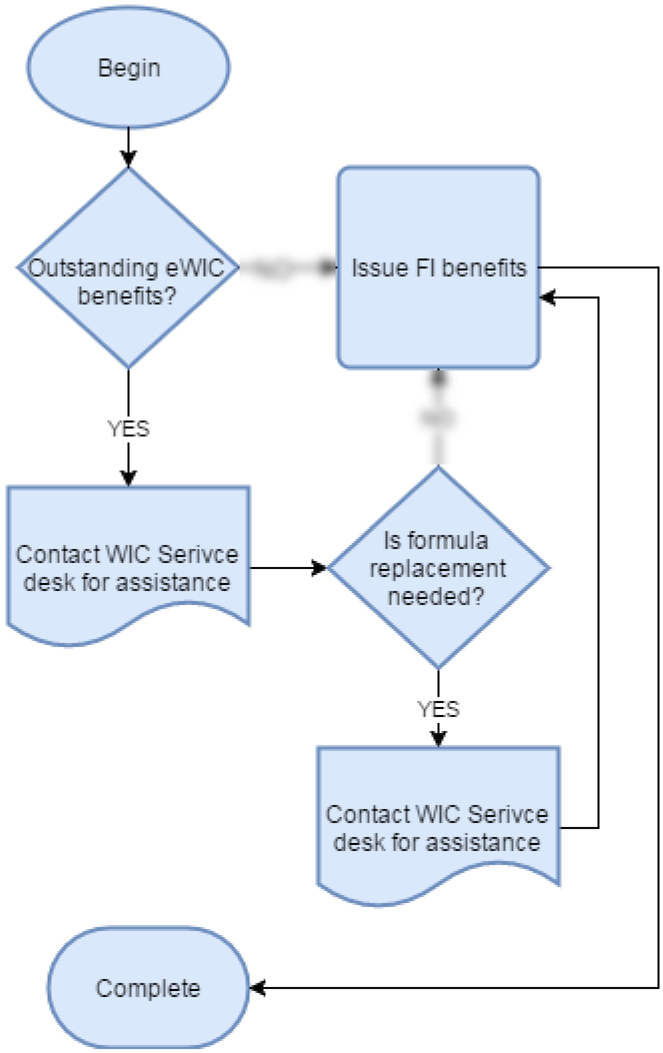


Figure 126: eWIC to FI client transfer process with current month eWIC benefits and formula replacement is needed

Steps:

1. Perform transfer process from eWIC Clinic to FI Clinic for the client.

An error message will display when the system attempts to complete the transfer process indicating that the client cannot be transferred as there are outstanding eWIC benefits and that the WIC Service desk needs to be contacted to complete the transfer.

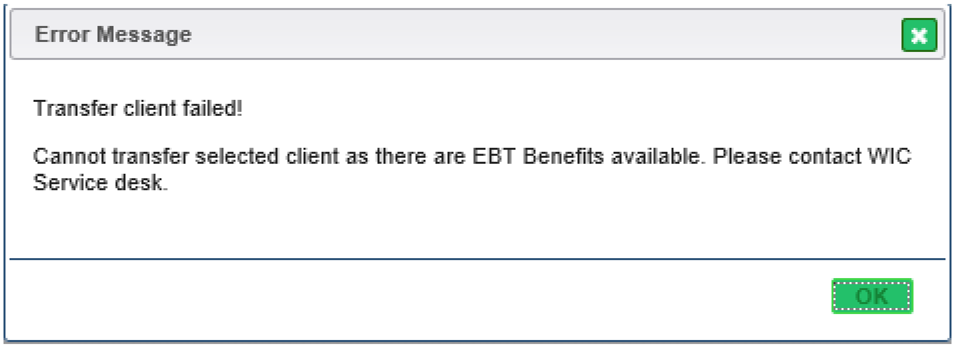


Figure 127: Outstanding eWIC Benefits Contact WIC Service desk window

The WIC Service desk will void the outstanding eWIC benefits and transfer the client to the user's FI Clinic. If a portion of the current month eWIC benefits have been redeemed these benefits must transfer with the client. The WIC Service desk will assign an eWIC card to the family, the card will be mailed to the family and the WIC Service desk will inform the family of vendors in their area that accept eWIC benefits. The user will continue with the following steps once they have been notified that the transfer has completed successfully.

2. Assign desired food package via the food package assignment page.
3. Navigate to the FI formula replacement page as client requires current month replacement

Figure 128: Client has current month eWIC formula benefits

The WIC Service desk must perform the eWIC formula replacement process. The user needs to provide the WIC Service desk with the desired replacement formula. The user will continue with the following steps once they have been notified that the replacement has completed successfully

4. Issue desired number of months of FI benefits via the Issuance screen.
5. Complete – client receives FI benefits starting in the next month as they have current month eWIC benefit issuance. A starter package will be issued to the client if necessary, to ensure a two-day gap doesn't occur if the new family's FDTU is different from the transferred client's.

Since eWIC benefits are assigned at the family level instead of the individual client level it is necessary for the system to determine the portion of benefits that each individual client has when a redemption occurs. This is the portion of benefits that transfer with the client. This portion of benefits is displayed on the Family Balance screen before the transfer within the client's EBT Available Balance column.

9.4 FI to eWIC Transfer

9.4.1 Family / Client Transfer

The following instructions provide the details and steps surrounding the process to transfer a family / client within an FI Clinic into an eWIC Clinic

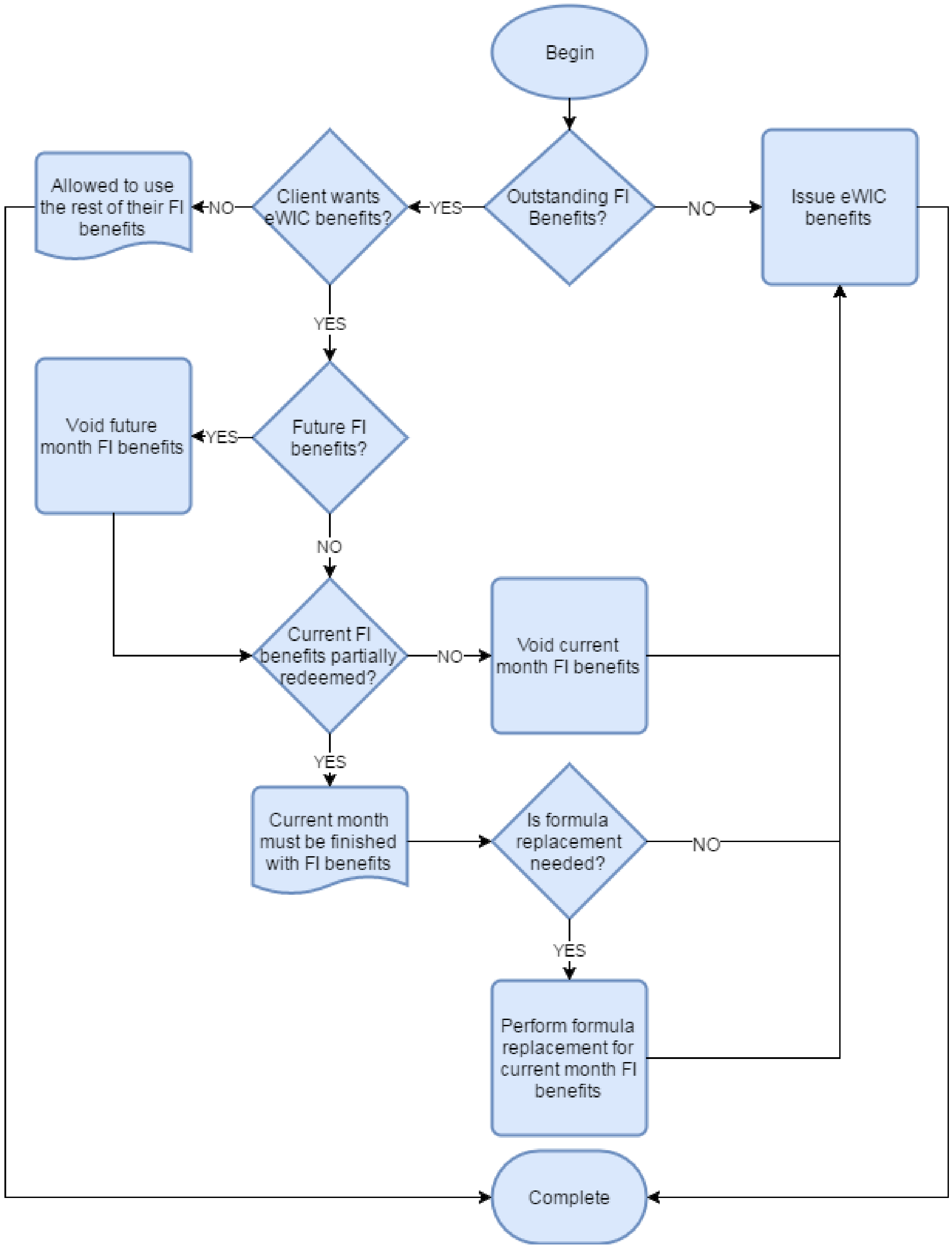


Figure 128: Overall FI to eWIC transfer process

Use Case 1: Client does not have current or future month FI benefits

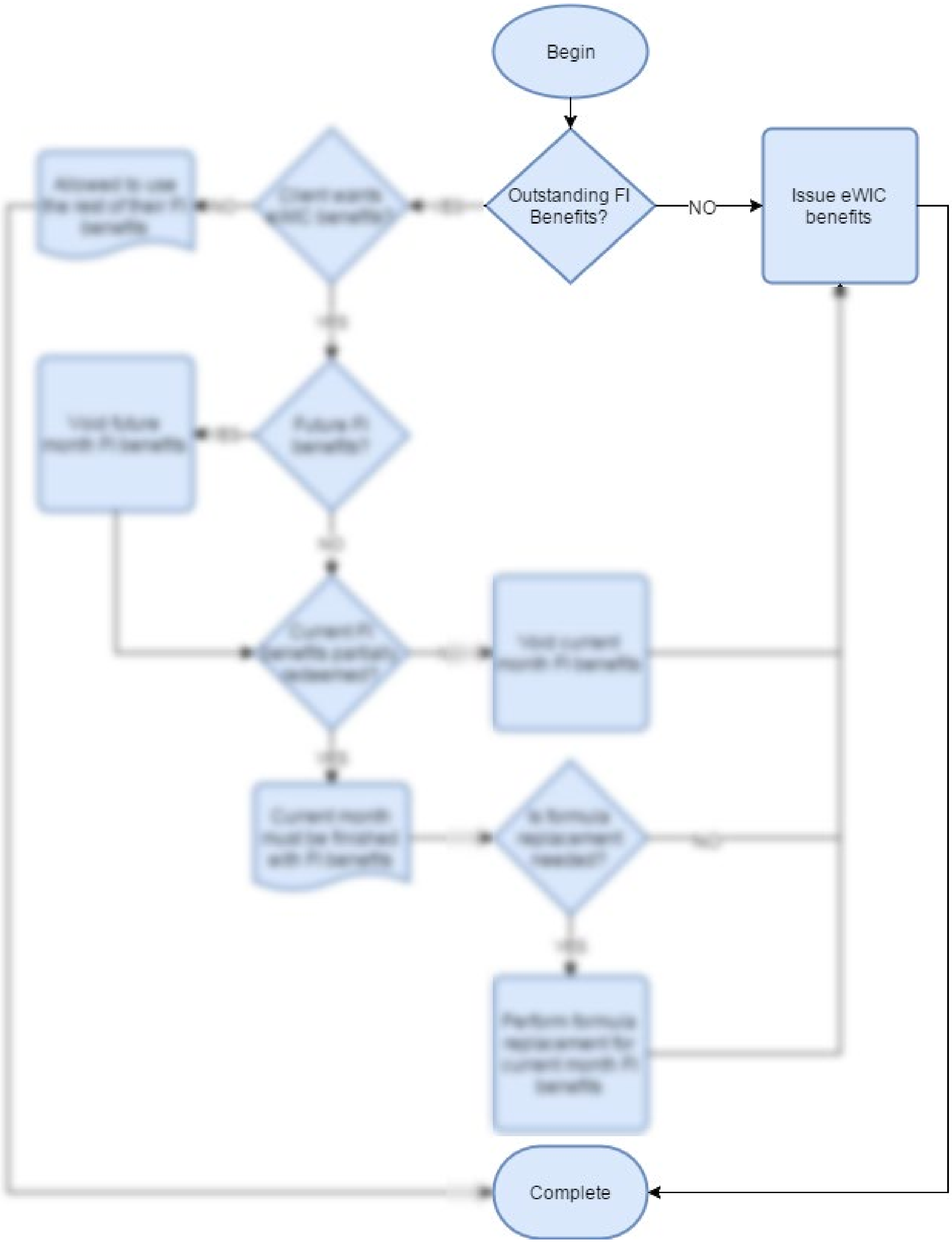


Figure 129: FI to eWIC transfer process with no outstanding benefits

Steps:

1. Perform transfer process from FI Clinic to eWIC Clinic.
2. Assign desired food package via the Tailoring screen.
3. Issue desired number of months of eWIC benefits via the Issuance screen.

4. Complete – client receives eWIC benefits starting in the current month. A starter package will be issued to the client if necessary, to ensure a two-day gap doesn't occur if the new family's FDTU is different from the transferred client's.

Use Case 2: Client wants to use their remaining current / future month FI benefits

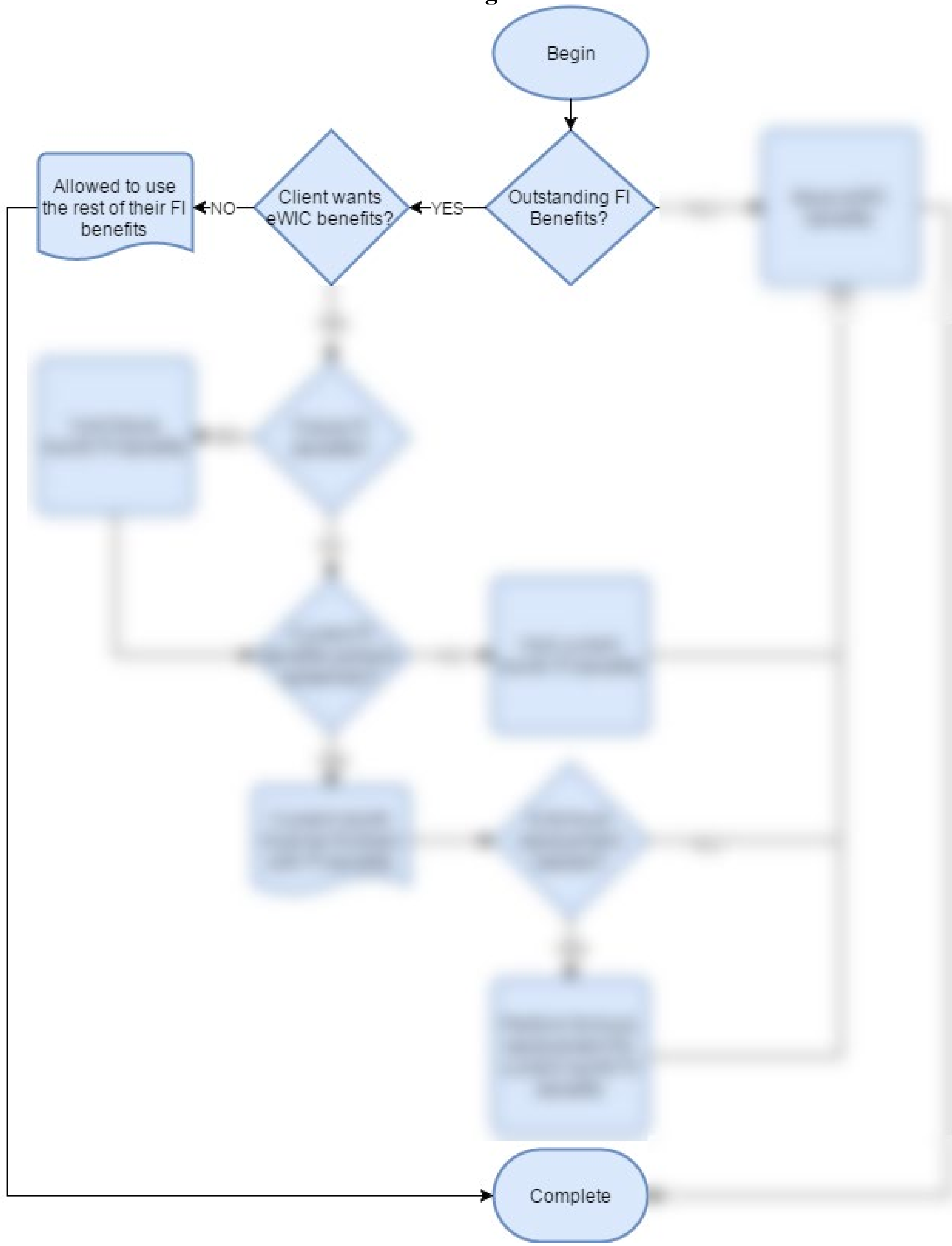


Figure 130: FI to eWIC transfer process and client is using up all current and future FI benefits

Steps:

1. Perform transfer process from FI Clinic to eWIC Clinic.
2. Complete – no action is required as client may use their remaining FI benefits. However, any new benefits that are issued to the client will be eWIC benefits. A starter package will be issued to the client to ensure a two-day gap doesn't occur between the FI benefits and eWIC benefits along with ensuring the client's LDTU syncs up with the family's.

Use Case 3: Client has 3 months FI benefits issued but none redeemed and would like all eWIC benefits

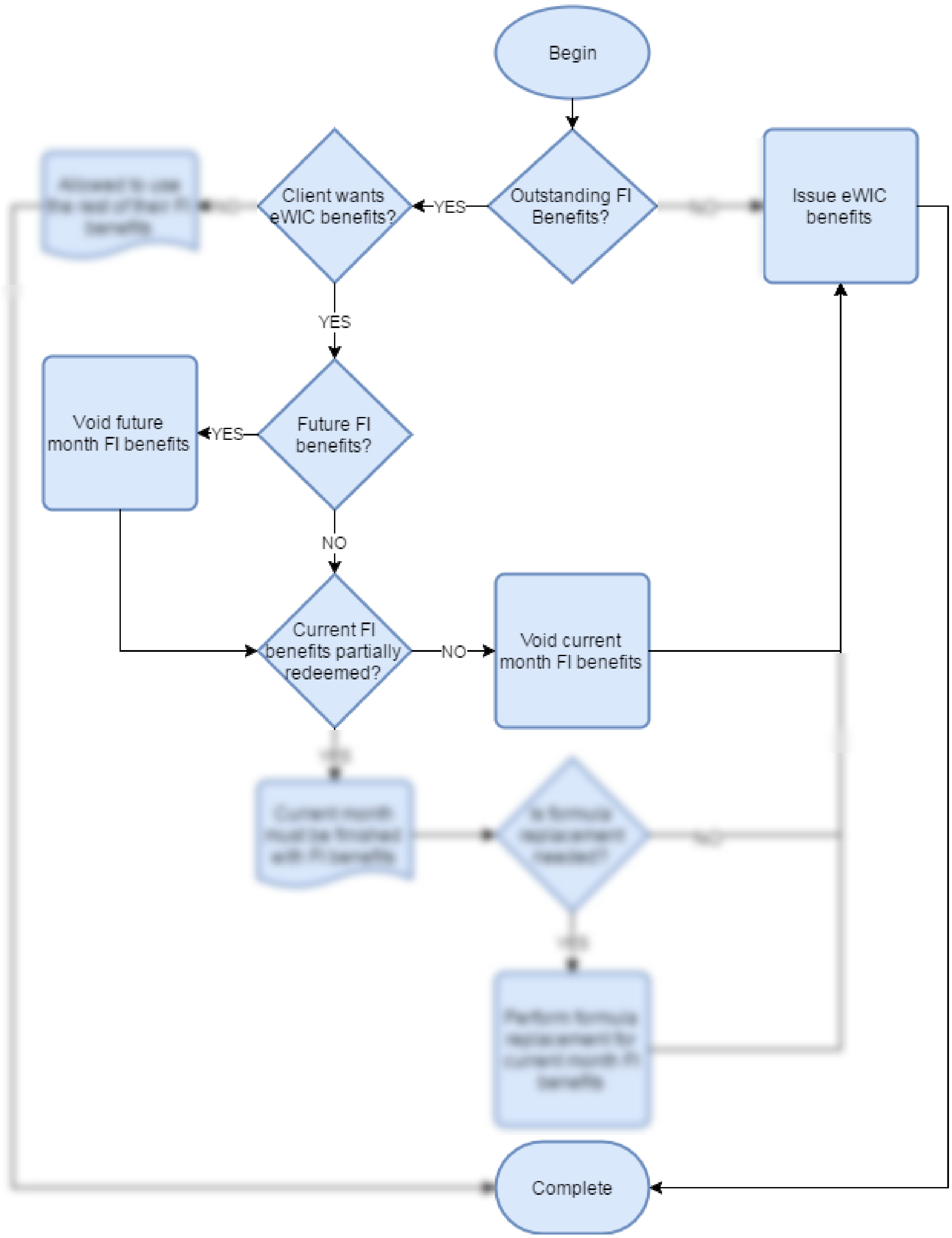


Figure 131: FI to eWIC transfer process and client wants eWIC benefits instead of issued FI benefits

Steps:

1. Perform transfer process from FI Clinic to eWIC Clinic.
2. Open the navigation drop down within the client's active record.
3. Select the void / reissue page.

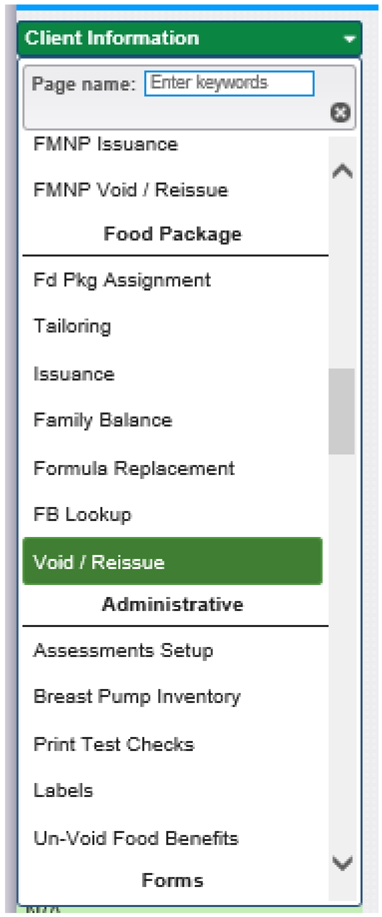


Figure 132: Void / reissue option within navigation drop down

4. Select a reason from the reasons drop down field of why the FI benefits are being voided.

A specific void reason has been created by the state agency to be used by Clinic users in this situation where the client would like to void their unused FI benefits and be issued eWIC benefits to cover those months.

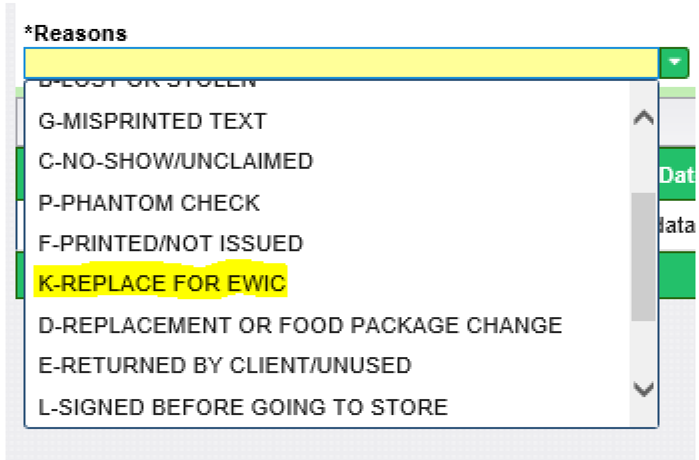


Figure 133: Specific eWIC void reason

5. Select the checkbox next to each FI benefit within the grid to be voided
6. Click the void selected checks button.

The system will not allow eWIC benefits to be issued overlapping future outstanding FI benefits.

7. Assign desired food package via the Tailoring screen.
8. Issue desired number of months of eWIC benefits via the Issuance screen.
9. Complete – client receives eWIC benefits starting in the current month. A starter package will be issued to the client to ensure a two-day gap doesn't occur between the FI benefits and eWIC benefits along with ensuring the client's LDTU syncs up with the family's.

Use Case 4: Client has redeemed a portion of their current month FI benefit issuance and does not require formula replacement

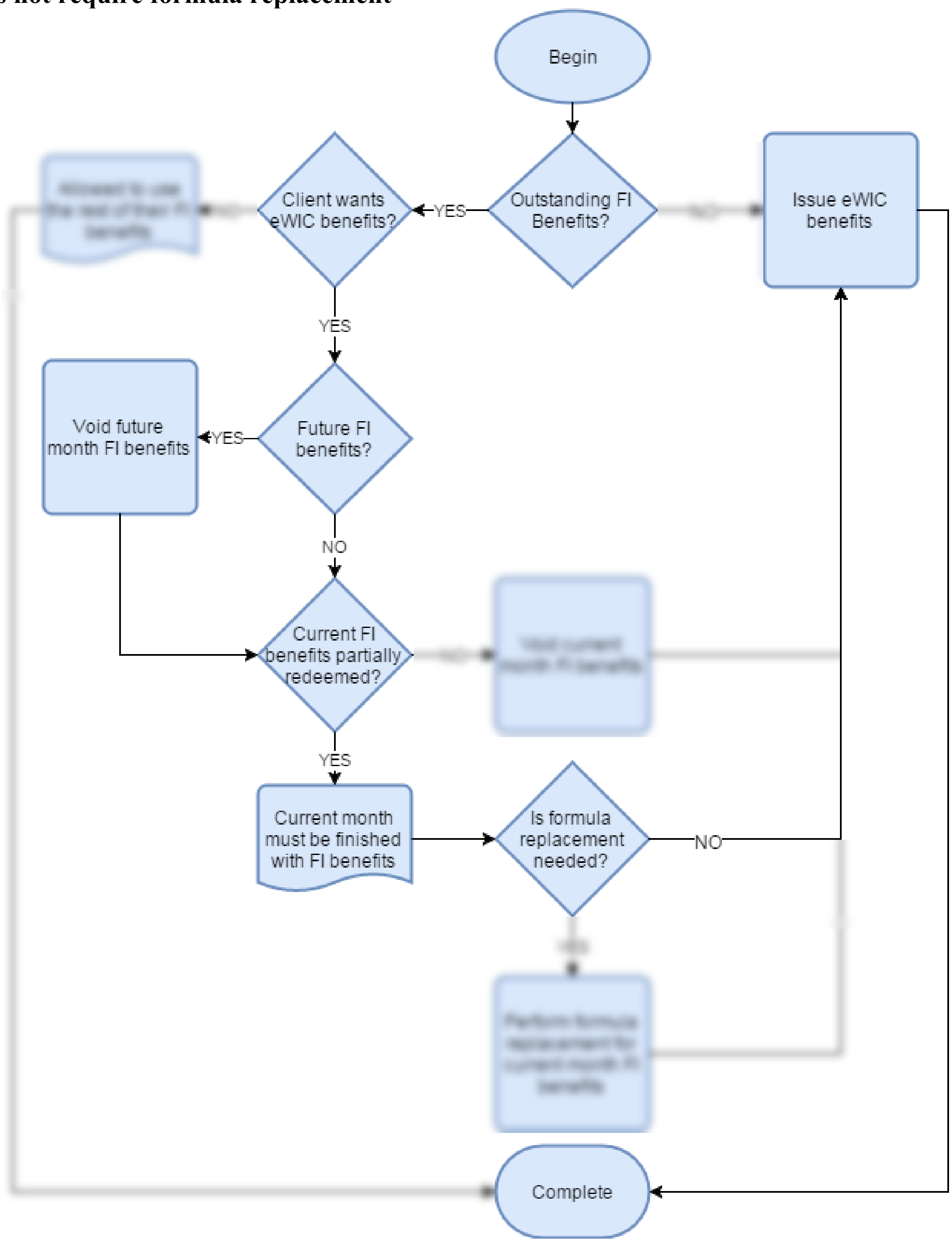


Figure 134: FI to eWIC transfer process with partially used current month benefits and no formula replacement needed

Steps:

1. Perform transfer process from FI Clinic to eWIC Clinic.

2. Use the FI void / reissue page to void all future month FI benefits. Since a portion of the current month FI benefits have been redeemed the current month cannot be voided.
3. Assign desired food package via the Tailoring screen.
4. Issue desired number of future months of eWIC benefits via the Issuance screen.
5. Complete – client receives eWIC benefits starting next month as the current month FI benefits are outstanding. A starter package will be issued to the client to ensure a two-day gap doesn't occur between the FI benefits and eWIC benefits along with ensuring the client's LDTU syncs up with the family's.

Use Case 5: Client has redeemed a portion of their current month FI benefit issuance and requires formula replacement

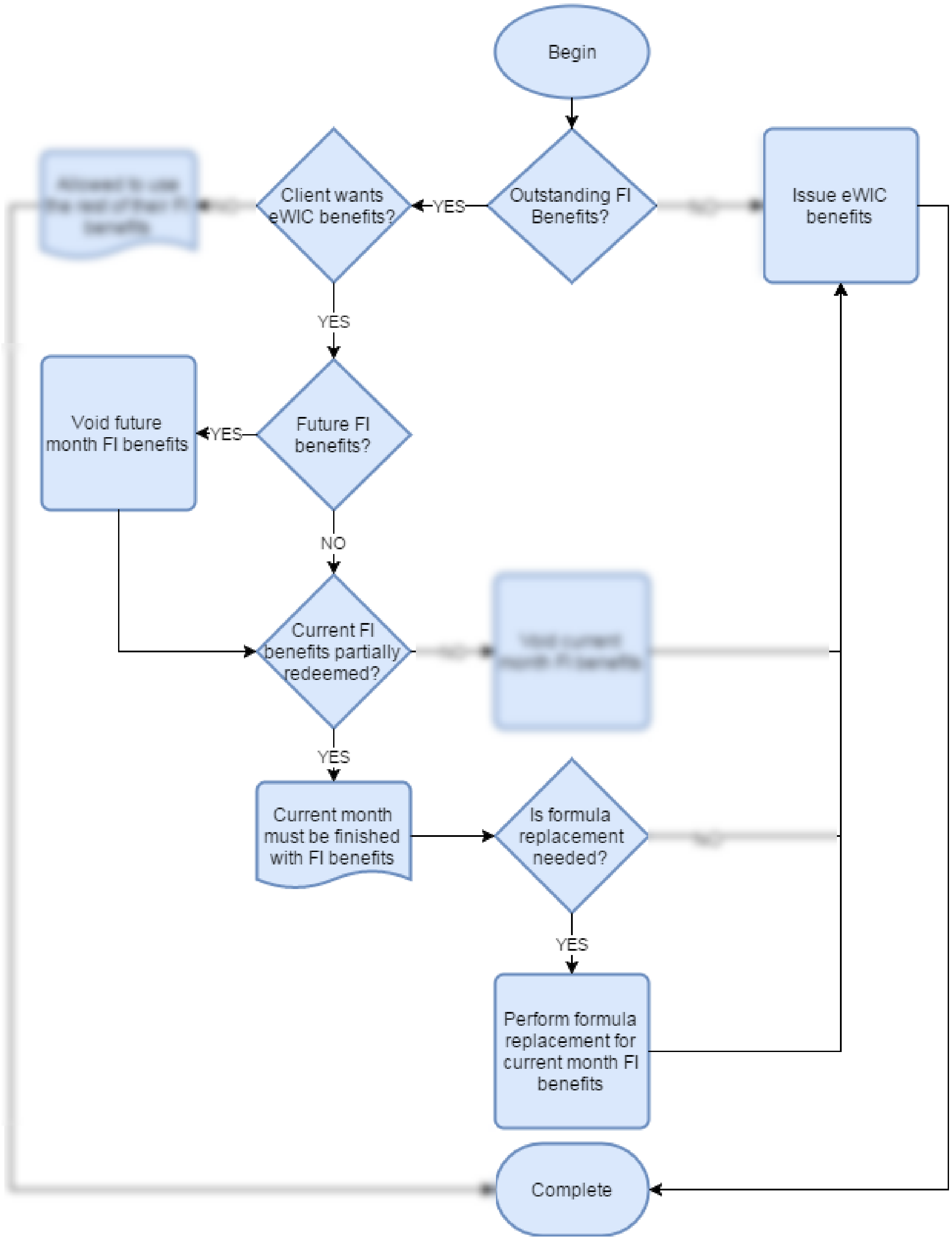


Figure 135: FI to eWIC transfer process with partially used current month benefits and formula replacement is needed

Steps:

1. Perform transfer process from FI Clinic to eWIC Clinic.

2. Use the FI void / reissue page to void all future month FI benefits. Since a portion of the current month FI benefits have been redeemed the current month cannot be voided.
3. Open the navigation drop down within the client's active record.
4. Select the food package assignment page.

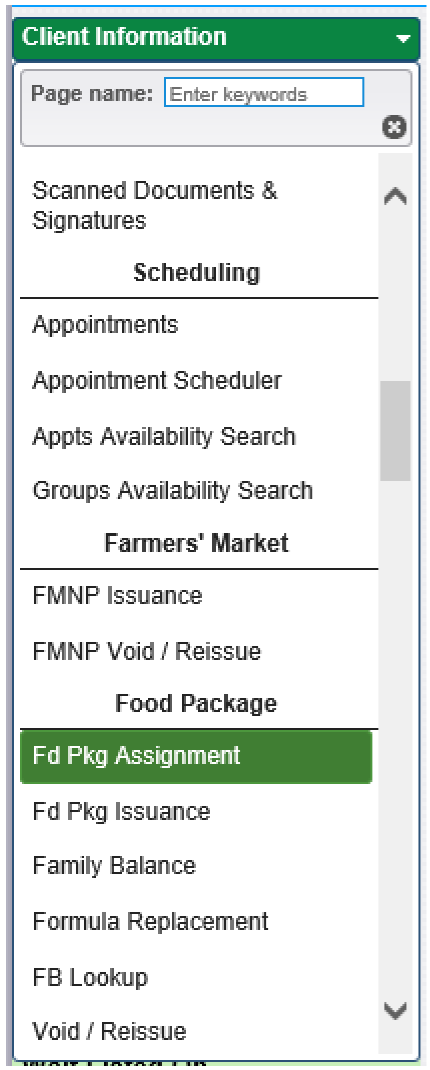


Figure 136: Food package assignment option within navigation drop down

5. Disable the old FI formula package.
6. Assign new FI formula package.
7. Open the navigation drop down within the client's active record.
8. Select the formula replacement page.

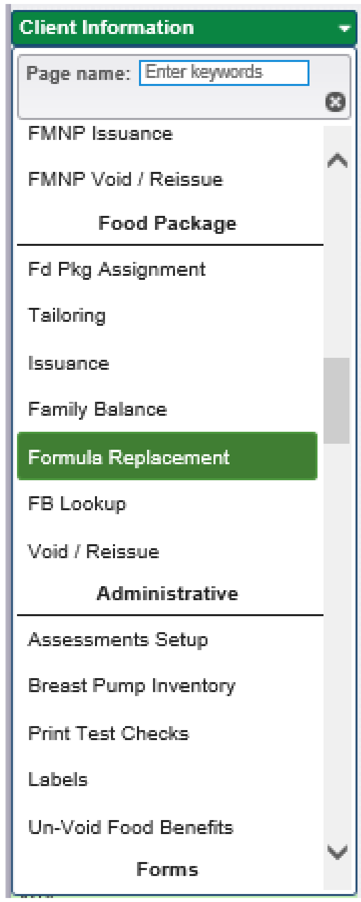


Figure 137: Formula replacement option within navigation drop down

9. Click the edit icon for a row within the grid.
10. Within the window that opens select the replacement formula from the Replacement Check drop down field.
11. Click the OK button.
12. Repeat steps 7-9 for each row that replacement is required for.
13. Click the Replace Checks button.
14. Assign desired food package via the Tailoring screen.
15. Issue desired number of future months of eWIC benefits via the Issuance screen.
16. Complete – client receives eWIC benefits starting next month as the current month FI benefits are outstanding. A starter package will be issued to the client to ensure a two-day gap doesn't occur between the FI benefits and eWIC benefits along with ensuring the client's LDTU syncs up with the family's.

9.5 eWIC to eWIC Transfer

9.5.1 Family Transfer

An eWIC family can seamlessly transfer to another eWIC Clinic using the existing transfer process. All eWIC benefits and information will be transferred with the family to the new eWIC Clinic.

9.5.2 Client Transfer

When transferring a client(s), who has eWIC benefits issued, and benefits redeemed for that month, system will determine the portion of the family benefits that are the clients. This portion of the benefits will be transferred with the client(s), if there are no benefits getting transferred with the client(s) for that month, then it will be assumed that they have fully redeemed all the benefits. In some scenarios, for avoiding any clients receiving a full month of benefits for only a day or two, the full benefits (originally issued not the remaining balance) will be prorated (only if they haven't fully used all the benefits).

The system will automatically void any future months of benefits during the transfer process.

Scenario 1: The client is transferring to a new eWIC family that has a FDTU that comes after the client's existing FDTU and the transfer is occurring within the same issuance month

Example Data:

Client FDTU - LDTU	New Family FDTU - LDTU	Transfer Date
12/20/2016 – 01/19/2017	12/25/2016 – 01/24/2017	12/22/2016

Use Case A: The client has some or all benefits remaining for the current issuance month

Since the new family's, December benefits start on 12/25 (which is in the future), they will get full benefits for the month starting on the new family's FDTU (12/25). They will also get a starter package starting on the day the transfer occurred (12/22) and ending the day before full benefits will be issued (12/24).

The transferred benefits for the client in the above example will be created as below:

FDTU	LDTU	Solution
12/22/2016	12/24/2016	Starter package - Prorated
12/25/2016	01/24/2017	Full month benefit

These benefits will be automatically issued to the client and can be viewed on the family balance screen. The user will then use the eWIC issuance process to issue the remaining future months of benefits the client is eligible for.

Since a client only transfers to the new family with their system determined portion of benefits the issued quantity and EBT Available Balance columns on the Family Balance screen will display the same amount initially. However, if a client has redeemed a portion of their original issued benefits within their original family the client will not be able to void this month of benefits within the new family.

Use Case B: The client has no benefits remaining for the current issuance month

The client will not receive any additional benefits for the month of December. However, when January benefits are issued, the client will receive a future starter package to cover the gap between the old family's LDTU on their December benefits and the new family's FDTU for January benefit issuance.

January issuance for this client will look as below.

FDTU	LDTU	Solution
01/20/2017	01/24/2017	Future Starter package – Prorated
01/25/2017	02/24/2017	Full month benefit

These benefits will not be automatically issued to the client. The user will need to issue them and any desired future benefits that the client is eligible for using the eWIC issuance process.

If the gap from the date of issuance or from the last date to use of the previous benefits and the newly issued benefits FDTU is less than 2 days, then they will not receive any starter package.

Scenario 2: The client is transferring to a new eWIC family that has a FDTU that comes after the client's existing FDTU and the transfer is occurring within the next issuance month

Example Data:

Client FDTU - LDTU	New Family FDTU - LDTU	Transfer Date
12/20/2016 – 01/19/2017	12/25/2016 – 01/24/2017	01/10/2017

Use Case A: The client has some or all benefits remaining for the current issuance month

Since the new family, December benefits start on 12/25 (which is after the client's original FDTU) with an end date of 1/24 and the client is being transferred on 1/10 (the next issuance month), they will get prorated benefits for the period of 1/10-1/24. However, the benefits will have dates matching the new family 12/25-1/24.

The transferred benefits for the client in the above example will be created as below:

FDTU	LDTU	Solution
12/25/2016	01/24/2017	Prorated benefits for the period 1/10/2017-1/24/2017

These benefits will be automatically issued to the client and can be viewed on the family balance screen. The user will then use the eWIC issuance process to issue the remaining future months of benefits the client is eligible for.

Since a client only transfers to the new family with their system determined portion of benefits the issued quantity and EBT available balance columns on the Family Balance screen will display the same amount initially. However, if a client has redeemed a portion of their original issued benefits within their original family the client will not be able to void this month of benefits within the new family.

Use Case B: The client has no benefits remaining for the current issuance month

The client will not receive any additional benefits for the month of December. However, when January benefits are issued, the client will receive a starter package to cover the gap.

January issuance for this client will look as below.

FDTU	LDTU	Solution
01/20/2017	01/24/2017	Future Starter package - Prorated
01/25/2017	02/24/2017	Full month benefit

These benefits will not be automatically issued to the client. The user will need to issue them and any desired future benefits that the client is eligible for using the eWIC issuance process.

Scenario 3: The client is transferring to a new eWIC family that has a FDTU that comes before the client's existing FDTU

Example Data:

Client FDTU - LDTU	New Family FDTU - LDTU	Transfer Date
12/25/2016 – 01/24/2017	12/20/2016 – 01/19/2017	12/26/2016

Use Case A: The client has some or all benefits remaining for the current issuance month

Since the new family, December benefits start on 12/20 with an end date of 1/19 and the client is getting transferred on 12/26, they will get prorated benefits for the period of 12/26-1/19. However, the benefits will have dates matching the new family 12/20-1/19.

The transferred benefits for this client will be created as below.

FDTU	LDTU	Solution
12/20/2016	01/19/2017	Prorated benefits for this period 12/26/2016-1/19/2017

These benefits will be automatically issued to the client and can be viewed on the family balance screen. The user will then use the eWIC issuance process to issue the remaining future months of benefits the client is eligible for.

Since a client only transfers to the new family with their system determined portion of benefits the issued quantity and EBT available balance columns on the Family Balance screen will display the same amount initially. However, if a client has redeemed a portion of their original issued benefits within their original family the client will not be able to void this month of benefits within the new family.

Use Case B: The client has no benefits remaining for the current issuance month

The client will not receive any additional benefits for the month of December. However, when January benefits are issued, benefits will start from 01/20**.**

January issuance for this client will look as below.

FDTU	LDTU	Solution
01/20/2017	02/19/2017	Full month benefit

These benefits will not be automatically issued to the client. The user will need to issue them and any desired future benefits that the client is eligible for using the eWIC issuance process.

Scenario 4: The client is transferring to a new eWIC family that has a FDTU that comes after the client's existing FDTU. The transfer is occurring near the end of the client's existing benefit period and the start of the new eWIC family's benefit period for the current issuance month

Example Data:

Client FDTU - LDTU	New Family FDTU - LDTU	Transfer Date
12/02/2016 – 01/01/2017	12/28/2016 – 01/27/2017	12/29/2016

Use Case A: The client has some or all benefits remaining for the current issuance month

Since the new family, December benefits start on 12/28 with an end date of 1/27 and the client is getting transferred on 12/29, they will get prorated benefits for the period of 12/29-1/27. However, the benefits will have dates matching the new family 12/28-1/27.

The transferred benefits for this client will be created as below.

FDTU	LDTU	Solution
12/28/2016	01/27/2017	Prorated benefits for the period 12/29/2016 – 01/27/2017

These benefits will be automatically issued to the client and can be viewed on the family balance screen. The user will then use the eWIC issuance process to issue the remaining future months of benefits the client is eligible for.

Since a client only transfers to the new family with their system determined portion of benefits the issued quantity and EBT available balance columns on the Family Balance screen will display the same amount initially. However, if a client has redeemed a portion of their original issued benefits within their original family the client will not be able to void this month of benefits within the new family.

Use Case C: The Client has no benefits remaining for the current issuance month

The client will not receive any additional benefits for the month of December. However, when January benefits are issued (1/28-2/27), the client will receive a future starter package to cover the gap (1/02-1/27)**.**

January issuance for the client will look as below.

FDTU	LDTU	Comments
01/02/2017	01/27/2017	Future Starter package - Prorated
01/28/2017	02/27/2017	Full month benefit

These benefits will not be automatically issued to the client. The user will need to issue them and any desired future benefits that the client is eligible for using the eWIC issuance process.

Scenario 5: The client is transferring to a new eWIC family that has a FDTU that comes before the client's existing FDTU. The transfer is occurring near the start of the client's existing benefit period and the end of the new eWIC family's benefit period for the current issuance month

Example Data:

Client FDTU - LDTU	New Family FDTU - LDTU	Transfer Date
12/28/2016 – 01/27/2017	12/02/2016 – 01/01/2017	12/29/2016

Use Case A: The client has some or all benefits remaining for the current issuance month

Since the new family, December benefits start on 12/2 with an end date of 1/1 and the client is getting transferred on 12/29, they will get prorated benefits for the period of 12/29-1/1. However, the benefits will have dates matching the new family 12/02-01/01.

The transferred benefits for this client will be created as below.

FDTU	LDTU	Solution
12/02/2016	01/01/2017	prorated benefits for the period 12/29/2016 – 01/01/2017
01/02/2017	02/01/2017	Full month benefit

These benefits will be automatically issued to the client and can be viewed on the family balance screen. The user will then use the eWIC issuance process to issue the remaining future months of benefits the client is eligible for.

Since a client only transfers to the new family with their system determined portion of benefits the issued quantity and EBT available balance columns on the Family Balance screen will display the same amount initially. However, if a client has redeemed a portion of their original issued benefits within their original family the client will not be able to void this month of benefits within the new family.

Use Case B: The Client has no benefits remaining for the current issuance month

The client will not receive any additional benefits for the month of December. However, when January benefits are issued, the benefits will start from 01/2**.**

January issuance will look as below.

FDTU	LDTU	Solution
01/02/2017	02/01/2017	Full month benefit

These benefits will not be automatically issued to the client. The user will need to issue them and any desired future benefits that the client is eligible for using the eWIC issuance process.

Scenario 1, case a: Client is transferring to a family with a FDTU in the future for the current issuance month

Steps:

1. Locate a client within an eWIC family that has a FDTU on their current month of issuance benefits in the past.

Original client's March eWIC benefit Issuance: Family's FDTU is the 21st of the month. Client's orginal March benefits have dates of 3/21/17-4/20/17 and they have not redeemed any.

– SMITH, LAILA

Food Category	Food Subcategory	Issued Qty.	EBT Available Balance	Unclaimed	Benefit Month
02-CHEESE OR TOFU	000-CHEESE	2 LB	2 LB		Mar 3/21/2017 - 4/20/2017
03-EGGS	000-EGGS	2 DOZ	2 DOZ		
05-BREAKFAST CEREAL	000-CEREAL (HOT OR COLD)	36 OZ	36 OZ		
06-LEGUMES	000-PB, BEANS, PEAS, LENTILS	2 CTR	2 CTR		
08-FISH	000-TUNA, SALMON, SARDINES	30 OZ	30 OZ		
16-BREAD/WHOLE GRAINS	000-WHOLE GRAINS	16 OZ	16 OZ		
19-FRUITS & VEGETABLES	000-FRUITS & VEGETABLES	11 $$$	11 $$$		
50-YOGURT	000-LOW AND NONFAT YOGURT	32 OZ	32 OZ		
52-REDUCED FAT MILK	000-LOW/FAT FREE COWS MILK	4 GAL	4 GAL		
52-REDUCED FAT MILK	502-SKIM/1% COWS MILK QT	1 QT	1 QT		
54-JUICE - 64 OZ	000-BOTTLED JUICE 64 OUNCE	2 BTL	2 BTL		

Figure 138: Client's Original Benefits

2. Locate an eWIC family that has a FDTU within the future but still within the current issuance month.

New family's eWIC benefit Issuance: Family's FDTU is the last day of the month. February benefits go from 2/28/17-3/30/17 while their March benefits would go from 3/31/17-4/29/17.

– SMITH, ROSE

Food Category	Food Subcategory	Issued Qty.	EBT Available Balance	Unclaimed	Benefit Month
02-CHEESE OR TOFU	000-CHEESE	1 LB	1 LB		Feb 2/28/2017 - 3/30/2017
03-EGGS	000-EGGS	1 DOZ	1 DOZ		
05-BREAKFAST CEREAL	000-CEREAL (HOT OR COLD)	36 OZ	36 OZ		
06-LEGUMES	000-PB, BEANS, PEAS, LENTILS	1 CTR	1 CTR		
16-BREAD/WHOLE GRAINS	000-WHOLE GRAINS	32 OZ	32 OZ		
19-FRUITS & VEGETABLES	000-FRUITS & VEGETABLES	8 $$$	8 $$$		
50-YOGURT	000-LOW AND NONFAT YOGURT	32 OZ	32 OZ		
52-REDUCED FAT MILK	000-LOW/FAT FREE COWS MILK	3 GAL	3 GAL		
54-JUICE - 64 OZ	000-BOTTLED JUICE 64 OUNCE	2 BTL	2 BTL		

Figure 139: New Family's Benefits

3. Perform the transfer process on the client found in step 1 to the eWIC family found in step 2.
4. Navigate to the Family Balance screen for the transferred client within the new eWIC family.

eWIC benefits for transferred client within their new family: The client receives a starter package from the date of the transfer with a LDTU being the day before the new family's FDTU. The starter package will be a reduced package based on the number of days between the transfer date and the LDTU on the benefits. The starter package has dates of 3/27/17-3/30/17 while the normal March issuance has dates of 3/31/17-4/29/17. The reduced package will be based on the 3 day spend period of the starter package in this example.

– SMITH, LAILA

Food Category	Food Subcategory	Issued Qty.	EBT Available Balance	Unclaimed	Benefit Month
05-BREAKFAST CEREAL	000-CEREAL (HOT OR COLD)	9 OZ	9 OZ		Mar 3/27/2017 - 3/30/2017
08-FISH	000-TUNA, SALMON, SARDINES	7 OZ	7 OZ		
16-BREAD/WHOLE GRAINS	000-WHOLE GRAINS	4 OZ	4 OZ		
19-FRUITS & VEGETABLES	000-FRUITS & VEGETABLES	2 $$$	2 $$$		
50-YOGURT	000-LOW AND NONFAT YOGURT	8 OZ	8 OZ		
52-REDUCED FAT MILK	000-LOW/FAT FREE COWS MILK	1 GAL	1 GAL		

Food Category	Food Subcategory	Issued Qty.	EBT Available Balance	Unclaimed	Benefit Month
02-CHEESE OR TOFU	000-CHEESE	2 LB	2 LB		Mar 3/31/2017 - 4/29/2017
03-EGGS	000-EGGS	2 DOZ	2 DOZ		
05-BREAKFAST CEREAL	000-CEREAL (HOT OR COLD)	36 OZ	36 OZ		
06-LEGUMES	000-PB, BEANS, PEAS, LENTILS	2 CTR	2 CTR		
08-FISH	000-TUNA, SALMON, SARDINES	30 OZ	30 OZ		
16-BREAD/WHOLE GRAINS	000-WHOLE GRAINS	16 OZ	16 OZ		
19-FRUITS & VEGETABLES	000-FRUITS & VEGETABLES	11 $$$	11 $$$		
50-YOGURT	000-LOW AND NONFAT YOGURT	32 OZ	32 OZ		
52-REDUCED FAT MILK	000-LOW/FAT FREE COWS MILK	4 GAL	4 GAL		
52-REDUCED FAT MILK	502-SKIM/1% COWS MILK QT	1 QT	1 QT		
54-JUICE - 64 OZ	000-BOTTLED JUICE 64 OUNCE	2 BTL	2 BTL		

Figure 140: Client's benefits after transfer to new eWIC family has been completed

Scenario 3, case a: Client is transferring to a family with a FDTU that comes before their current family's FDTU

Steps:

1. Locate a client with current issuance month eWIC benefits.

Original client's March eWIC benefit Issuance: Family's FDTU is the 23rd of the month. Client's orginal March benefits have dates of 3/23/17-4/22/17 and they have not redeemed any.

– SMITH, DONNA

Food Category	Food Subcategory	Issued Qty.	EBT Available Balance	Unclaimed	Benefit Month
02-CHEESE OR TOFU	000-CHEESE	1 LB	1 LB		Mar 3/23/2017 - 4/22/2017
03-EGGS	000-EGGS	1 DOZ	1 DOZ		
05-BREAKFAST CEREAL	000-CEREAL (HOT OR COLD)	36 OZ	36 OZ		
06-LEGUMES	000-PB, BEANS, PEAS, LENTILS	2 CTR	2 CTR		
16-BREAD/WHOLE GRAINS	000-WHOLE GRAINS	16 OZ	16 OZ		
19-FRUITS & VEGETABLES	000-FRUITS & VEGETABLES	11 $$$	11 $$$		
50-YOGURT	000-LOW AND NONFAT YOGURT	32 OZ	32 OZ		
52-REDUCED FAT MILK	000-LOW/FAT FREE COWS MILK	4 GAL	4 GAL		
52-REDUCED FAT MILK	501-SKIM/1% COWS MILK HGL	1 HGL	1 HGL		
54-JUICE - 64 OZ	000-BOTTLED JUICE 64 OUNCE	2 BTL	2 BTL		

Figure 141: Client's Original Benefits

2. Locate an eWIC family that has a FDTU that comes before the original family's FDTU for the current issuance month.

New family's eWIC benefit Issuance: Family's FDTU is the 21st of the month. March benefits go from 3/21/17-4/20/17.

– DOE, JOHN

Food Category	Food Subcategory	Issued Qty.	EBT Available Balance	Unclaimed	Benefit Month
09-INFANT CEREAL	000-INFANT CEREAL	24 OZ	24 OZ		Mar 3/21/2017 - 4/20/2017
12-INFANT FRUITS & VEGS	000-INFANT FRUITS & VEGS	128 OZ	128 OZ		
21-INFANT FORMULA	082-SIMILAC ADV 12.4 OZ [PWD]	7 Can(s)	7 Can(s)		

Figure 142: New Family's Benefits

3. Perform the transfer process on the client found in step 1 to the eWIC family found in step 2.
4. Navigate to the Family Balance screen for the transferred client within the new eWIC family.

eWIC benefits for transferred client within their new family: Family's FDTU is the 21st of the month. The client will receive March benefits with dates matching that of the new family. The client's March benefits have dates of 3/21/17-4/20/17. The client will receive a reduced package for this month based on the number of days between the transfer date and the LDTU on the benefits.

− SMITH, DONNA

Food Category	Food Subcategory	Issued Qty.	EBT Available Balance	Unclaimed	Benefit Month
02-CHEESE OR TOFU	000-CHEESE	1 LB	1 LB		Mar 3/21/2017 - 4/20/2017
03-EGGS	000-EGGS	1 DOZ	1 DOZ		
05-BREAKFAST CEREAL	000-CEREAL (HOT OR COLD)	36 OZ	36 OZ		
06-LEGUMES	000-PB, BEANS, PEAS, LENTILS	2 CTR	2 CTR		
16-BREAD/WHOLE GRAINS	000-WHOLE GRAINS	16 OZ	16 OZ		
19-FRUITS & VEGETABLES	000-FRUITS & VEGETABLES	11 $$$	11 $$$		
50-YOGURT	000-LOW AND NONFAT YOGURT	32 OZ	32 OZ		
52-REDUCED FAT MILK	000-LOW/FAT FREE COWS MILK	4 GAL	4 GAL		
52-REDUCED FAT MILK	501-SKIM/1% COWS MILK HGL	1 HGL	1 HGL		
54-JUICE - 64 OZ	000-BOTTLED JUICE 64 OUNCE	2 BTL	2 BTL		

Figure 143: Client's benefits after transfer to new eWIC family has been completed

10 HISTORY PAGE

Narrative:
The purpose of this page is to track the historical data that has been entered for a Client. The user will be able to view the historical data relative to the selected client for past and current certification periods. The user will also have the ability to print out a copy of the Client's historical data.

Navigation Path: WIC Services tab | Client/Family Search | Navigation drop down list | History page

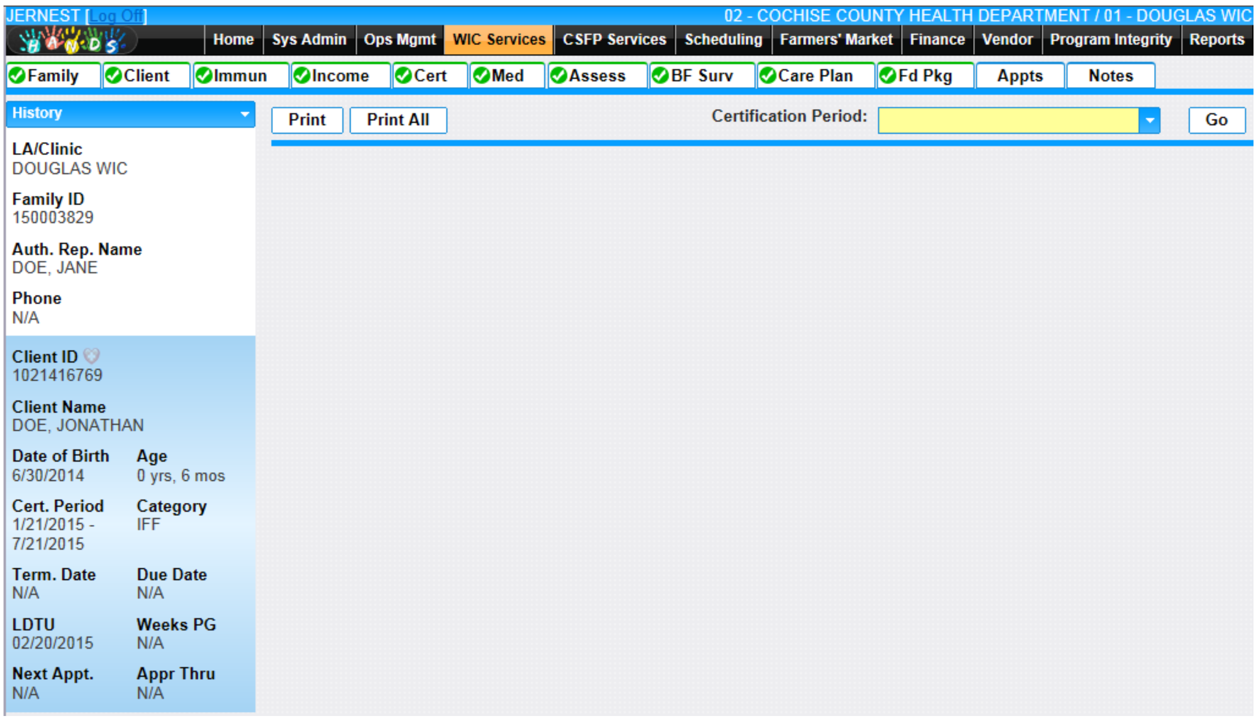


Figure 144: History page

Fields:

- **Certification Period –** A drop down list which displays all of the Client's certification records. This field is mandatory.

Buttons:

- **Print –** Press this button to print the current history section for the selected certification period. This button cannot be used until the history results page is populated.
- **Print All –** Press this button to print the entire history results page for the Client for the selected certification period. This button cannot be used until the history results page is populated.
- **Go –** Press this button to populate the history results page with recorded historical data for the selected certification period.

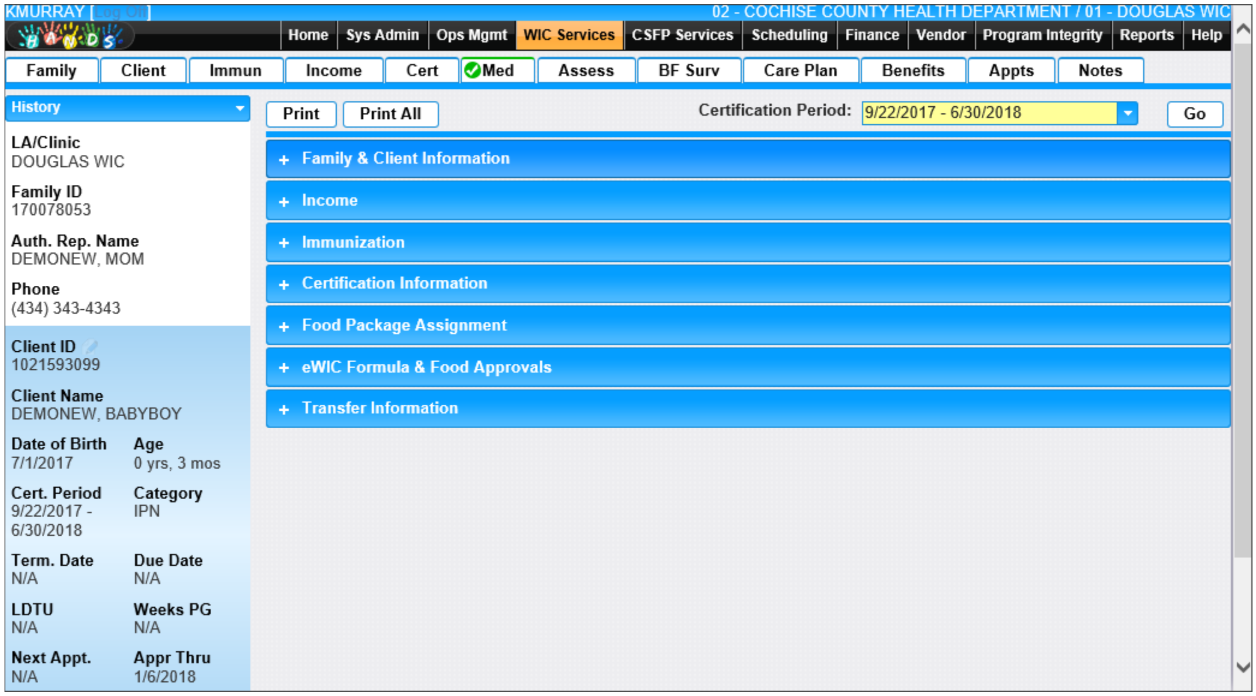


Figure 145: Populated History Page

NOTE: Clicking on the plus icon for the different sections on the page will expand the section to display detailed historical information for the Client and selected certification period. Additionally, if no historical information exists for a certain section or field on the page N/A will be displayed.

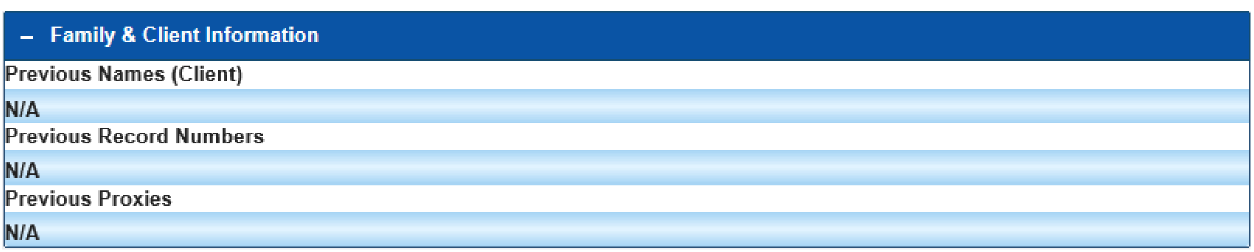


Figure 146: Family & Client Information (Current Certification)

Fields (Family & Client Information): Current Certification

- **Previous Names (Client) –** The previous names for the Client. This field is display only.
- **Previous Record Numbers –** The previous Client IDs for the Client taken when two Clients have been flagged as duplicates and resolved. This field is display only.
- **Previous Proxies –** The previous proxies for the Client. This field is display only.

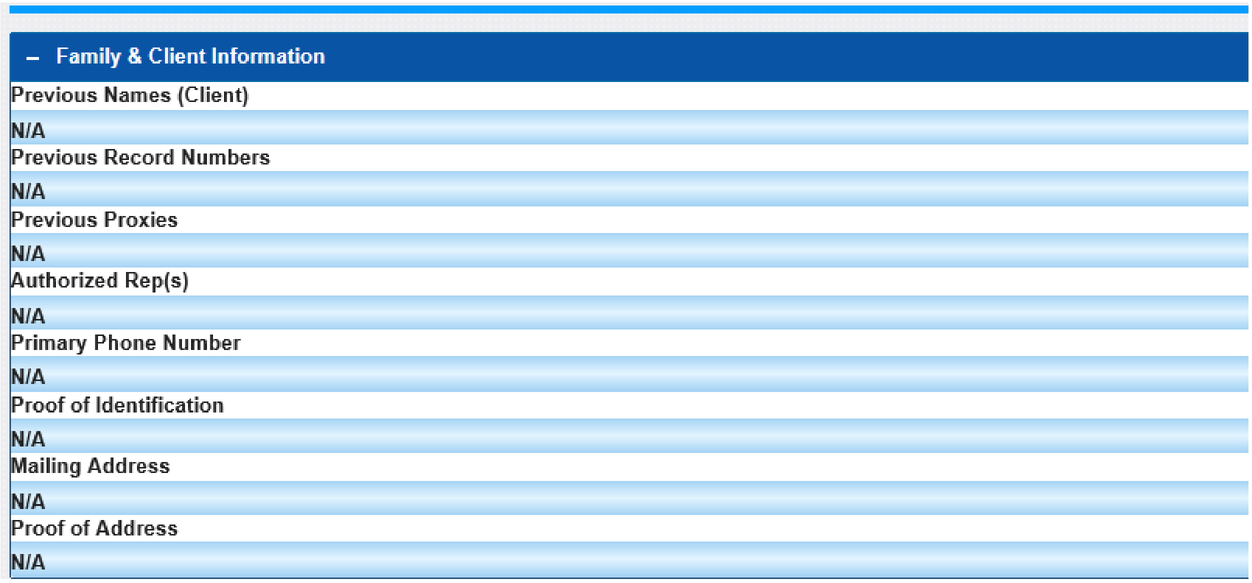


Figure 147: Family & Client Information (Previous Certification(s))

Fields (Family & Client Information): Previous Certification(s)

- **Previous Names (Client) –** The previous names for the Client. This field is display only.
- **Previous Record Numbers –** The previous Client IDs for the Client taken when two Clients have been flagged as duplicates and resolved. This field is display only.
- **Previous Proxies –** The previous proxies for the Client. This field is display only.
- **Authorized Rep(s) –** The previous authorized reps for the Client. This field is display only.
- **Primary Phone Number –** The previous primary phone number for the Client. This field is display only.
- **Proof of Identification –** The previous poof of identification for the Client. This field is display only.
- **Mailing Address –** The previous mailing address for the Client. This field is display only.
- **Proof of Address –** The previous proof of address for the Client. This field is display only.

– Income

1/21/2015

Income Date	Monthly Income Total	Family Size
1/21/2015	$0.00	3

Providers

Income Provider	Amount	Interval	Hours Per Week	Documentation	Monthly

Monthly Income Breakdown

Member	Monthly Income

1/21/2015

Income Date	Monthly Income Total	Family Size
1/21/2015	$41.67	3

Providers

Income Provider	Amount	Interval	Hours Per Week	Documentation	Monthly
PRIMARY PROVIDER	$500.00	A-ANNUALLY		14:CHILD SUPPORT AWARD LETTER	$41.67

Monthly Income Breakdown

Member	Monthly Income

Adjunct Programs

Date	Member	Program	Participating	Eligible
1/21/2015	DOE JONATHAN	FDPIR	Y	Y
1/21/2015	DOE SAM	SECTION 8	N	N
1/21/2015	DOE JONATHAN	SECTION 8	Y	Y
1/21/2015	DOE JONATHAN	AHCCCS	Y	Y
1/21/2015	DOE JONATHAN	SECTION 8	N	N
1/21/2015	DOE JONATHAN	SNAP (FOOD STAMPS)	Y	Y
1/21/2015	DOE JONATHAN	AHCCCS	N	N
1/21/2015	DOE JONATHAN	SNAP (FOOD STAMPS)	N	N

Figure 148: Income (Current Certification)

Fields (Income): Current Certification

- **Income Date –** The previous income date for the Client. This field is display only.
- **Monthly Income Total –** The previous monthly income total for the Client. This field is display only.
- **Family Size –** The previous family size for the Client. This field is display only.
- **Providers Grid:**
  - **Income Provider –** The previous income provider for the Client. This field is display only.
  - **Amount –** The previous income amount for the previous provider for the Client. This field is display only.
  - **Interval –** The previous income interval for the previous provider for the Client. This field is display only.

  - **Hours Per Week –** The previous income hours per week for the previous provider for the Client. This field is display only.
  - **Documentation –** The previous income documentation for the previous provider for the Client. This field is display only.
  - **Monthly –** The previous income monthly amount for the previous provider for the Client. This field is display only.

- **Monthly Income Breakdown Grid:**
  - **Member –** The name of the Client of the previous income record. This field is display only.
  - **Monthly Income –** The previous monthly income for the Client. This field is display only.

- **Adjunct Programs Grid:**
  - **Date –** The date of the previous adjunct program were moved to the history page for the Client. This field is display only.
  - **Member –** The name of the Client of the previous adjunct program for the previous income record. This field is display only.
  - **Program –** The program name of the previous adjunct program for the previous income record. This field is display only.
  - **Participating –** The status for the adjunct program for the previous income record for the Client. This field is display only.
  - **Eligible –** The eligibility status for the previous adjunct program for the previous income record for the Client. This field is display only.

Fields (Income): Previous Certification(s)

- **Income Date –** The previous income date for the Client. This field is display only.

- **Monthly Income Total –** The previous monthly income total for the Client. This field is display only.

- **Family Size –** The previous family size for the Client. This field is display only.

- **Providers Grid:**
  - **Income Provider –** The previous income provider for the Client. This field is display only.
  - **Amount –** The previous income amount for the previous provider for the Client. This field is display only.
  - **Interval –** The previous income interval for the previous provider for the Client. This field is display only.
  - **Hours Per Week –** The previous income hours per week for the previous provider for the Client. This field is display only.
  - **Documentation –** The previous income documentation for the previous provider for the Client. This field is display only.
  - **Monthly –** The previous income monthly amount for the previous provider for the Client. This field is display only.

- **Monthly Income Breakdown Grid:**
  - **Member –** The name of the Client of the previous income record. This field is display only.
  - **Monthly Income –** The previous monthly income for the Client. This field is display only.

- **Migrant –** The previous migrant checkbox selection for the previous income record for the Client. This field is display only.

- **Homeless –** The previous homeless checkbox selection for the previous income record for the Client. This field is display only.

- **Refugee –** The previous refugee checkbox selection for the previous income record for the Client. This field is display only.

- **Group Home –** The previous group home checkbox selection for the previous income record for the Client. This field is display only.

- **Military –** The previous military checkbox selection for the previous income record for the Client. This field is display only.

- **Adjunct Programs Grid:**
  - **Date –** The date of the previous adjunct programs were moved to the history page for the Client. This field is display only.
  - **Member –** The name of the Client of the previous adjunct program for the previous income record. This field is display only.
  - **Program –** The program name of the previous adjunct program for the previous income record. This field is display only.
  - **Participating –** The status for the adjunct program for the previous income record for the Client. This field is display only.
  - **Eligible –** The eligibility status for the previous adjunct program for the previous income record for the Client. This field is display only.

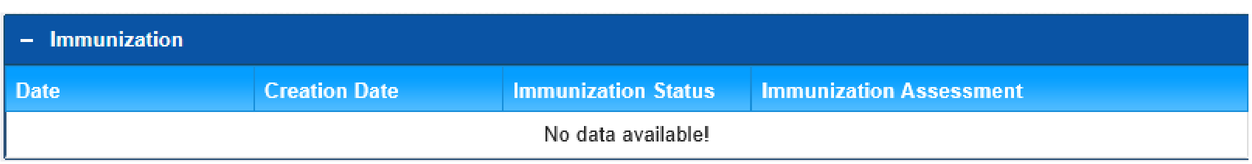


Figure 149: Immunization (Current Certification / Previous Certification(s))

Fields (Immunization): Current Certification / Previous Certification(s)

- **Date –** The date the previous immunization record was moved to the history page for the Client. This field is display only.
- **Creation Date –** The date the previous immunization record was created for the Client. This field is display only.
- **Immunization Status –** The immunization status for the Client's previous immunization record. This field is display only.

- **Immunization Assessment –** The immunization assessment for the Client's previous immunization record. This field is display only.

– Certification Information

Category	Cert Start Date	Cert End Date	Cert Created By
No data available!			

Figure 150: Certification Information (Current Certification)

Fields (Certification Information): Current Certification

- **Category –** The category for the Client's previous certification record. This field is display only.
- **Cert Start Date –** The certification start date for the Client's previous certification record. This field is display only.
- **Cert End Date –** The certification end date for the Client's previous certification record. This field is display only.
- **Cert Created By –** The username of the user who created the Client's previous certification record. This field is display only.

– Certification Information

Category	Cert Start Date	Cert End Date	Wait List	Cert Created By
No data available!				

Figure 151: Certification Information (Previous Certification(s))

Fields (Certification Information): Previous Certification(s)

- **Category –** The category for the Client's previous certification record. This field is display only.
- **Cert Start Date –** The certification start date for the Client's previous certification record. This field is display only.
- **Cert End Date –** The certification end date for the Client's previous certification record. This field is display only.
- **Wait List –** The selection of the wait list checkbox for the Client's previous certification record. This field is display only.
- **Cert Created By –** The username of the user who created the Client's previous certification record. This field is display only.

– Care Plan

WIC Codes
N/A
Nutrition Discussion Topics
N/A

Figure 152: Care Plan (Previous Certification(s))

Fields (Care Plan Information): Previous Certification(s)

- **WIC Codes –** The WIC Codes that have been assigned to the Client in previous certifications. This field is display only.
- **Nutrition Discussion Topics –** The nutrition discussion topics that have been assigned to the Client in previous certifications. This field is display only.

NOTE: Care Plan Information section does not exist for Current Certifications.

– Food Package Assignment

Date	Food Package ID	Description	Approved Thru Date	Nutritionist Name	Date of Changes	Modified By
1/21/2015	AZ910016	PROSOBEE, 12.9 OZ POWDER, IFF				
1/21/2015	AZ410005	WHOLE MILK, 3 GAL, 1 QUART, CHEESE, 1 LB, C1				

Figure 153: Food Package Assignment (Current Certification)

Fields (Food Package Assignment): Current Certification

- **Date –** The date that the previous food package assignment record was moved to the history page for the Client. This field is display only.
- **Food Package ID –** The food package ID for the previously assigned food package for the Client. This field is display only.
- **Description –** The food package description for the previously assigned for package for the Client. This field is display only.
- **Approved Thru Date –** The approved thru date for the previously assigned food package for the Client. This field is display only.
- **Nutritionist Name –** The username of the user who approved the previously assigned food package for the Client. This field is display only.
- **Date of Changes –** The date of changes for the previously assigned food package for the Client. This field is display only.
- **Modified By –** The username of the user who changed the previously assigned food package for the Client. This field is display only.

– Food Package Assignment

Date	Food Package ID	Description	Start Date	End Date	Approved Thru Date	Nutritionist Name
11/19/2004	AA922522	ENFAMIL LIPIL W/ IRON, PWD, 9 CANS, 0-5 MOS.	11/19/2004	3/15/2005		
11/19/2004	AA923522	ENFAMIL LIPIL W/ IRON, PWD, 9 CANS, 6-12 MOS.	3/16/2005	9/15/2005		

Figure 154: Food Package Assignment (Previous Certification(s))

Fields (Food Package Assignment): Previous Certification(s)

- **Date –** The date that the previous food package assignment record was moved to the history page for the Client. This field is display only.
- **Food Package ID –** The food package ID for the previously assigned food package for the Client. This field is display only.
- **Description –** The food package description for the previously assigned for package for the Client. This field is display only.
- **Approved Thru Date –** The approved thru date for the previously assigned food package for the Client. This field is display only.
- **Nutritionist Name –** The username of the user who approved the previously assigned food package for the Client. This field is display only.
- **Modified By –** The username of the user who changed the previously assigned food package for the Client. This field is display only.

– eWIC Formula & Food Approvals

Date Issued	Food Category	Food Subcategory	FDTU	LDTU	Approved Thru Date	Voided/Replaced	Nutritionist Name
9/26/2017	31-SPECIAL INF FORMULA	034-SIMILAC NEOSURE 2OZ CAS	9/8/2017	10/7/2017		R	
9/26/2017	21-INFANT FORMULA	082-SIMILAC ADV 12.4 OZ	9/8/2017	10/7/2017		V	
9/8/2017	21-INFANT FORMULA	082-SIMILAC ADV 12.4 OZ	9/8/2017	10/7/2017			
9/8/2017	21-INFANT FORMULA	082-SIMILAC ADV 12.4 OZ	10/8/2017	11/7/2017			
9/8/2017	21-INFANT FORMULA	082-SIMILAC ADV 12.4 OZ	11/8/2017	12/7/2017			

Figure 155: eWIC Formula & Food Approvals (Current Certification / Previous Certification(s))

Fields (eWIC Formula & Food Approvals): Current Certification / Previous Certification(s)

- **Date Issued –** The date the food category/subcategory was transacted (issued, voided, replaced) on behalf of the Client. Transactions such as voids and replacements display as separate records above the original issuance record. Transactions are displayed in descending order using a hidden Transaction ID value.
- **Food Category –** The Food Category.
- **Food Subcategory –** The Food Subcategory.
- **FDTU –** The date of First Date To Use of the benefit month.
- **LDTU –** The date of Last Date To Use date of the benefit month. Sort order is by LDTU with the latest transactions displayed first.
- **Approved Thru Date –** The date that the formula or food item is approved through.
- **Voided/Rplc –** The indicator which identifies whether the formula or food was either voided or replaced. For Voided (V) record, it displays the formula that was voided. For Replaced (V/R) records, it displays the V/R on the formula that is being replaced. The replacement formula will show as a regular transaction, directly above the replaced formula.
- **Nutritionist Name –** The name of the nutritionist which approved the formula or food item.

– Transfer Information

Transfer Date	Family ID	Auth Rep 1	Address	Primary Phone Number	Foster	Transferred From	Transferred To	VOC
No data available!								

Figure 156: Transfer Information (Current Certification / Previous Certification(s))

Fields (Transfer Information): Current Certification / Previous Certification(s)

- **Transfer Date –** The date of the Client's transfer. This field is display only.
- **Family ID –** The Family ID for the Client's previous Family record for the Client. This field is display only and populated when a Client transfers a single Client to a new or existing Family.
- **Auth Rep 1 –** The first authorized representative for the previous Family record for the Client. This field is display only and populated when a Client transfers a single Client to a new or existing Family.
- **Address –** The address for the previous Family record for the Client. This field is display only and populated when a Client transfers a single Client to a new or existing Family.
- **Primary Phone Number –** The primary phone number for the previous Family record for the Client. This field is display only and populated when a Client transfers a single Client to a new or existing Family.
- **Foster –** A Y or N will be displayed to indicate if the Client was a foster child at the time of the transfer. This field is display only.
- **Transferred From –** The Clinic that the Client/Family was transferred from. This field is display only.
- **Transferred To –** The Clinic that the Client/Family was transferred into. This field is display only.
- **VOC –** The VOC for the Clients previous out-of-state transfer. This field is display only and only populates after a Client has begun a new certification.

– Notes

Date	Note Type	Note	Staff
No data available!			

Figure 157:: Notes (Previous Certification(s))

Fields (Notes): Previous Certification(s)

- **Date** – The date the note was moved to the history page for the Client. This field is display only and occurs when a new certification occurs.
- **Note Type** – The note type for the previous note record for the Client. This field is display only.
- **Note** – The text for the previous note record for the Client. This field is display only.
- **Staff** – The username of the user who created the previous note. This field is display only.

NOTE: Notes section does not exist for Current Certifications.

Calculations: None

Background Processes: None

11 FB LOOKUP

Narrative:

The purpose of the page is to view all food benefits (FB) and cash value vouchers (CVV) that have been issued to Clients. The user will only be able to view food benefits and cash value vouchers that have been issued from their logged in Clinic. The user has the ability to filter food benefits and CVVs printed by Family ID, Client ID, vendor ID, farmer ID, CVV ID, the date to use range, and by a particular serial number range.

Navigation Path: WIC Services tab | Client/Family Search | Navigation drop down list | FB Lookup

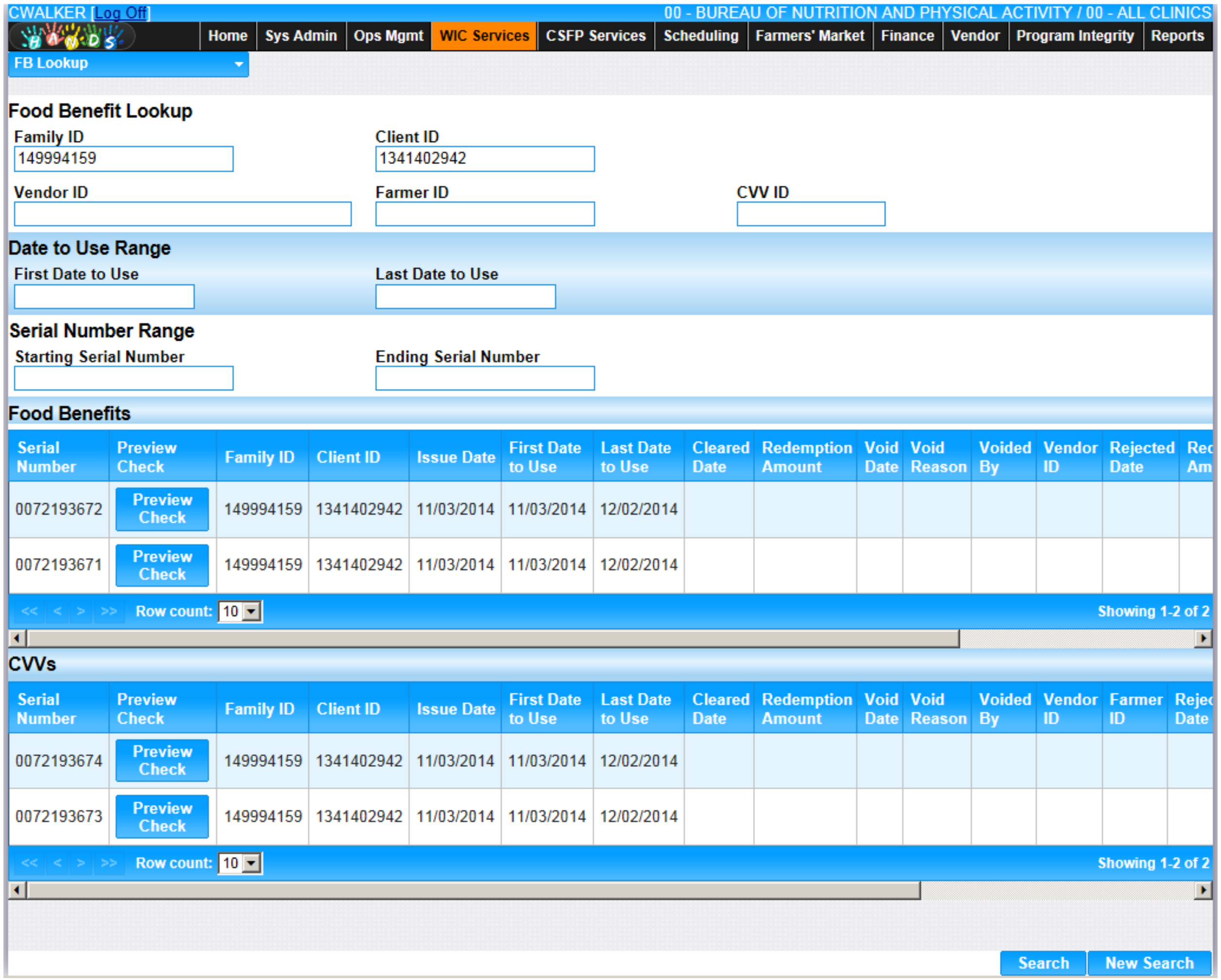


Figure 158: Food Benefit Lookup

Fields (Search Criteria):

- **Family ID** – A unique, system generated identification number for the Family. This field is optional.
- **Client ID** – A unique, system generated identification number for the Client. This field is optional.
- **Vendor ID** – The unique identification number given to the vendor. This field is optional.
- **Farmer ID** – The unique identification number given to the farmer. This field is optional.

- **CVV ID –** The number that uniquely identifies each farmer who accepts cash value vouchers. The farmer name is shown when the CVV ID field is validated. This field is optional.
- **Date to Use Range – From / To –** Enter the beginning and end date for which food instruments will be searched and choose the Search button.
- **Serial Number Range – From / To –** Enter the beginning and ending serial numbers for which food instruments will be searched and choose the Search button.

Fields (Food Benefit Grid):

- **Serial Number –** The unique identification number given to the printed food benefit.
- **Preview Check –** Press the Prevew Check button to preview the printed food benefit.

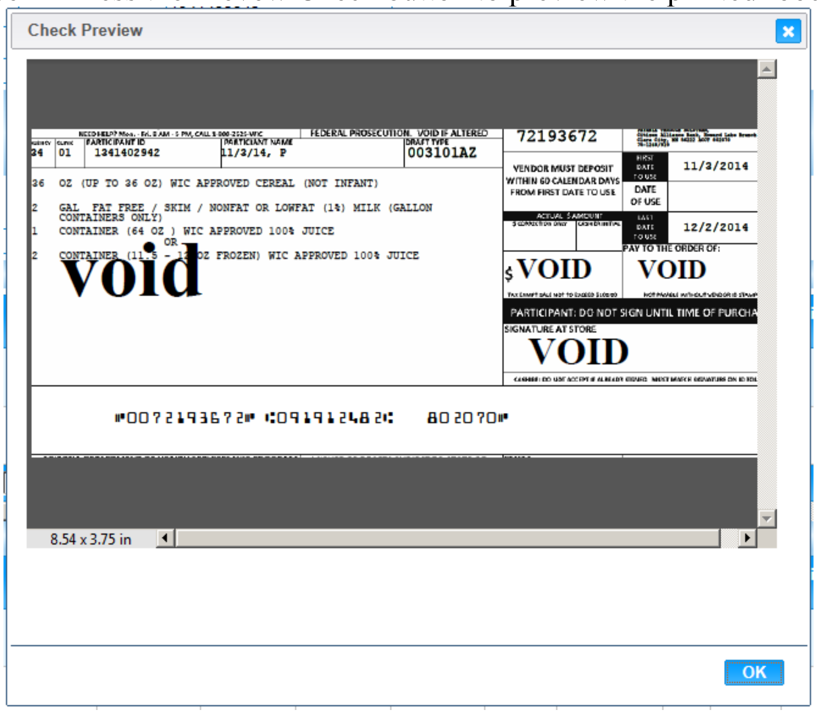


Figure 159: Preview Check Modal

- **Family ID –** The Family ID of the Family that the food benefit was issued too. This field is display only.
- **Client ID –** The Client ID of the Client that the food benefit was issued too. This field is display only.
- **Issue Date –** The date that the food benefit was issued to a Client. This field is display only.
- **First Date to Use –** The first date that the food benefit can be redeemed. This field is display only.
- **Last Date to Use –** The last day which the food benefit may be redeemed. This field is display only.
- **Cleared Date –** The date on which the food benefit was paid by the WIC fiscal intermediary. This field is display only and will display blank if the food benefit has not been paid yet.
- **Redemption Amount –** The dollar amount which was paid to the vendor for the food benefit. This field is display only and will display blank if the food benefit has not been redeemed yet.
- **Void Date –** The date the food benefit was voided. This field is display only and will display blank if the food benefit has not been voided.

- **Void Reason –** The reason the food benefit was voided. This field is display only and will display blank if the food benefit has not been voided.
- **Voided By –** The username of the user that voided the food benefit. This field is display only and will display blank if the food benefit has not been voided.
- **Vendor ID –** The vendor ID of the vendor where the food benefit was redeemed. This field is display only and will display blank if the food benefit has not been redeemed.
- **Rejected Date –** The date on which the food benefit was rejected by the WIC fiscal intermediary. This field is display only and will display blank if the food benefit has not been rejected.
- **Requested Amount –** The amount that was requested by vendor management for payment on a rejected food benefit. This field is display only and will display blank if the food benefit has not been rejected.
- **Rejected Reason –** The reason(s) the food benefit was rejected by the WIC fiscal intermediary. This field is display only and will display blank if the food benefit has not been rejected.
- **Issued By –** The username of the user that issued the food benefit. This field is display only.
- **LA/Clinic –** The Local Agency and Clinic organization code combination of the Local Agency and Clinic that issued the food benefit. This field is display only.

Fields (CVV Grid):

- **Serial Number –** The unique identification number given to the printed CVV.
- **Preview Check –** Press the Prevew Check button to preview the printed CVV.

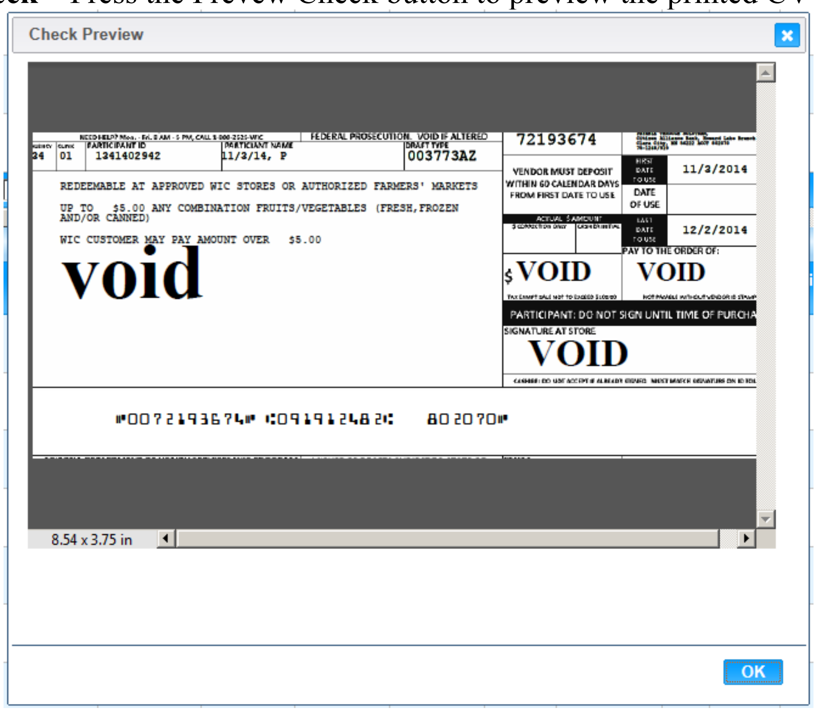


Figure 160: Preview Check Modal

- **Family ID –** The Family ID of the Family that the CVV was issued too. This field is display only.
- **Client ID –** The Client ID of the Client that the CVV was issued too. This field is display only.

- **Issue Date –** The date that the CVV was issued to a Client. This field is display only.
- **First Date to Use –** The first date that the CVV can be redeemed. This field is display only.
- **Last Date to Use –** The last day which the CVV may be redeemed. This field is display only.
- **Cleared Date –** The date on which the CVV was paid by the WIC fiscal intermediary. This field is display only and will display blank if the CVV has not been paid yet.
- **Redemption Amount –** The dollar amount which was paid to the vendor for the CVV. This field is display only and will display blank if the CVV has not been redeemed yet.
- **Void Date –** The date the CVV was voided. This field is display only and will display blank if the CVV has not been voided.
- **Void Reason –** The reason the CVV was voided. This field is display only and will display blank if the CVV has not been voided.
- **Voided By –** The username of the user that voided the CVV. This field is display only and will display blank if the CVV has not been voided.
- **Vendor ID –** The vendor ID of the vendor where the CVV was redeemed. This field is display only and will display blank if the CVV has not been redeemed.
- **Rejected Date –** The date on which the CVV was rejected by the WIC fiscal intermediary. This field is display only and will display blank if the CVV has not been rejected.
- **Requested Amount –** The amount that was requested by vendor management for payment on a rejected CVV. This field is display only and will display blank if the CVV has not been rejected.
- **Rejected Reason –** The reason(s) the CVV was rejected by the WIC fiscal intermediary. This field is display only and will display blank if the CVV has not been rejected.
- **Issued By –** The username of the user that issued the CVV. This field is display only.
- **LA/Clinic –** The Local Agency and Clinic organization code combination of the Local Agency and Clinic that issued the CVV. This field is display only.

Buttons:

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

Calculations: None

Background Processes: None

12 SIGNATURES PAGE

Narrative:

The purpose of this page is to capture Client signatures in regard to important program documentation. The Client signature will be tied to the Client's record so that users can view it at any point in time. Signatures are captured by pressing the signature button which appears on several pages throughout the WIC Services module. The user can view all signatures, the type of signature, and the date the signature was recorded for all members of the Family by selecting the Scanned Documents & Signature page in the navigation drop down list when within a Client's record.

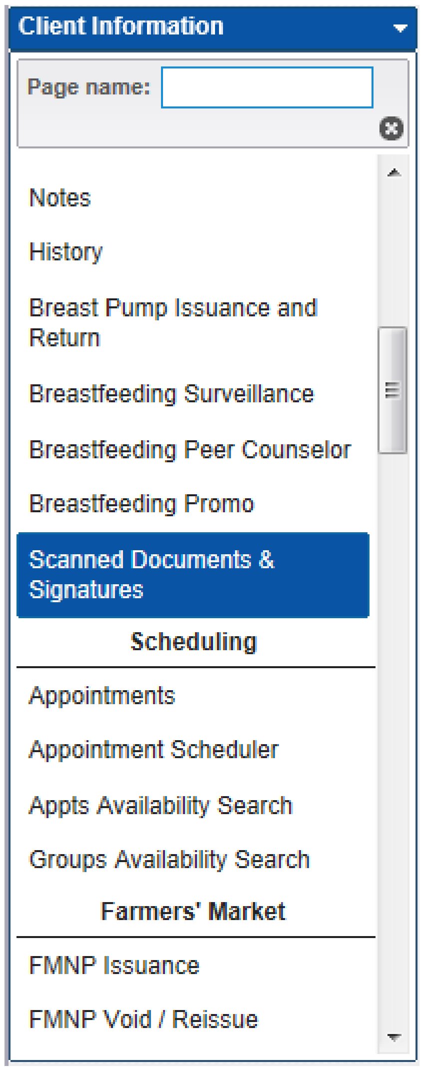


Figure 161: Scanned Documents & Signatures Navigation drop down list

Navigation Path: WIC Services tab | Client/Family Search | Navigation drop down list | Scanned Documents & Signatures

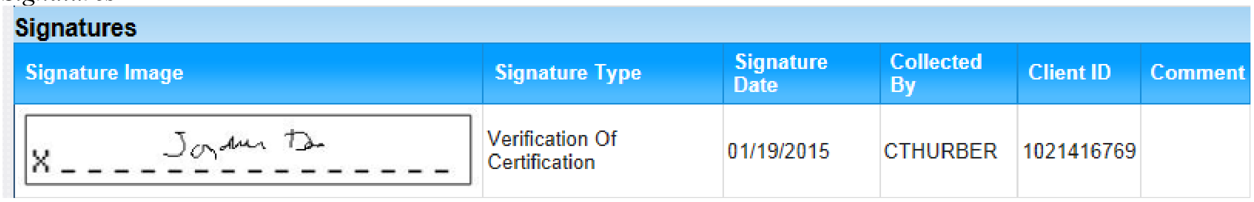


Figure 162: Scanned Documents & Signatures Page

Fields:

- **Signature Image –** The image of the Client's captured signature. This field is display only.
- **Signature Type –** The type of signature captured. This field is display only.
- **Signature Date –** The date the signature was captured. This field is display only.
- **Collected By –** The logged in username of the user that was with the Client when the signature was captured.
- **Client ID –** A unique, system generated identification number for the Client that the captured signature is linked too. This field is display only.
- **Comment –** A free form text field that allows the user to enter additional information regarding the captured signature record. This field is display only.

Buttons: None

Calculations: None

Background Processes:

1) Signatures that have been captured for all Client records within the Family will be displayed in the signature grid on this page.

Navigation Path: WIC Services tab | Client/Family Search | Client Information | Signature Page

12.1 Add a New Signature Page

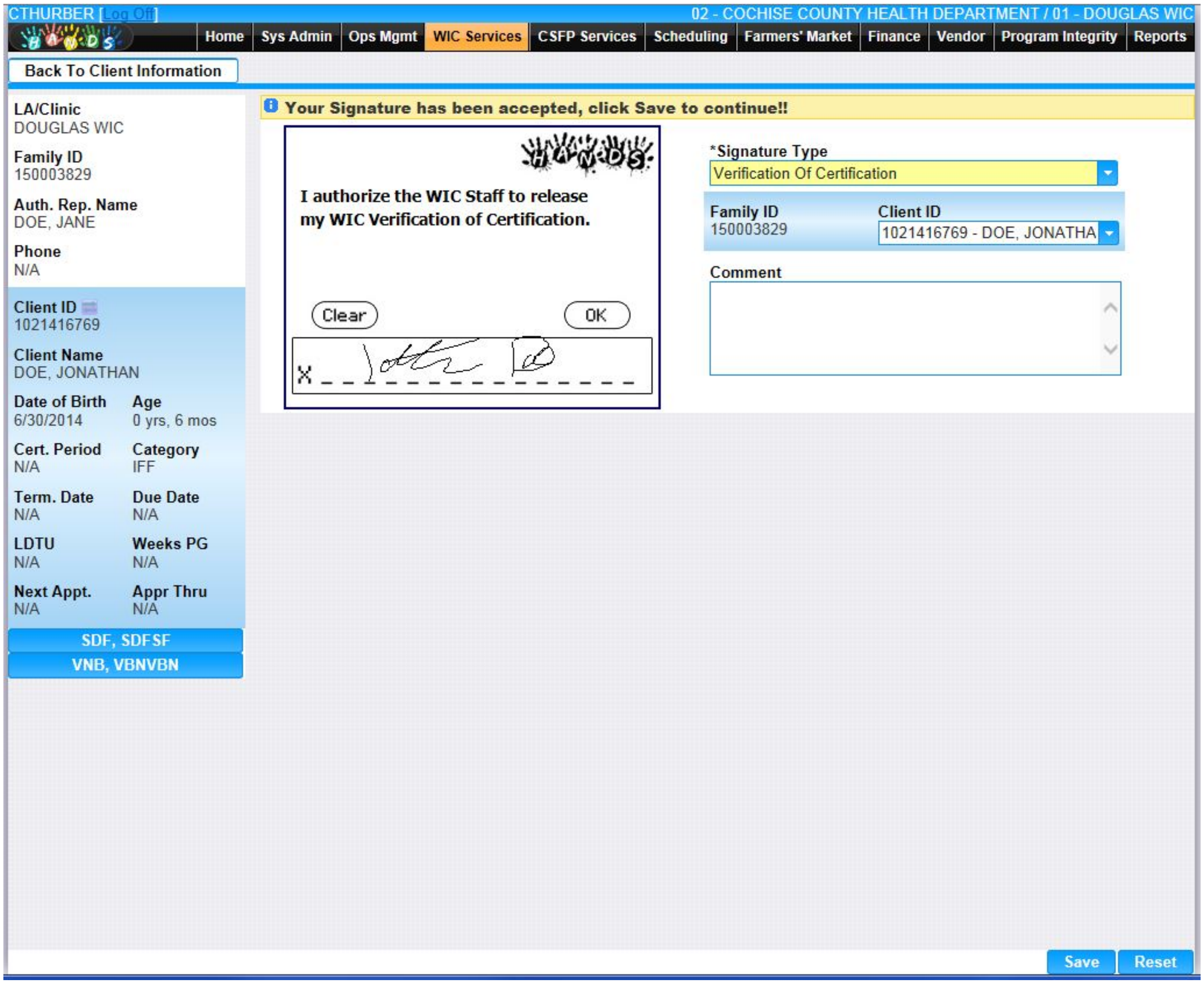


Figure 163: Add Signature Page

The linked image cannot be displayed. The file may have been moved, renamed, or deleted. Verify that the link points to the correct file and location.

Figure 164: Saved Signature

NOTE: The Client must sign the signature pad and then press the OK button on the signature pad for the user to see the signature in the system. The user must press the save button on the page in order to complete the signature capture. If the Clear button is pressed on the signature pad the current signature will be cleared and the user will have to re-sign their name. Once the user has saved the signature in the system it cannot be edited or deleted.

Fields:

- **Signature Type –** The type of signature being captured. This field is mandatory and selected from a drop down list.
- **Family ID –** A unique, system generated identification number for the Family that the Client who is having the signature captured. This field is display only.
- **Client ID –** A unique, system generated identification number for the Client who is having the signature captured. This field is selected from a drop down list which is populated with all Client's within the Family. This field is not mandatory and will default blank if the signature being captured is at the Family level. This field will default with a particular Client's information and be mandatory if the signature being captured is at the Client level. For more information, see background process number two.
- **Comment –** A free form text field that allows the user to enter additional information regarding the captured signature record. This field is optional.

Buttons:

- **Save –** Press this button to save changes made to the page. For more information, see background process number one.

- **Reset –** Press this button to return the page to its original state without any changes being saved.
- **Back to Client Information –** Press this button to return to the previous page. The page that the user will be returned

Calculations: None

Background Processes:

1) The system performs a four step save process when saving a new Family:
    a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
    b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
    c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
    d. Finally, after the other three steps have been completed successfully the system adds the data to the database.

2) The table below represents all the different signatures that can be captured for Clients and Families within the WIC Services module. The first column represents the page that the signature will be captured on. The second column contains the signature type which populates the signature type drop down list on the signatures page. The message column is the text that will appear on the signature pad for the Client to read and agree to. When a signature is captured for a Client and/or Family that particular party is agreeing to the contract represented by the text on the screen. The last column in the table determines if the signature type being captured is at the Family level or Client level.

Page	Signature Type	Message	Family/Client Level
Family	eWIC Card Received	I acknowledge that I received an eWIC card.	Family
Family	Proxy Form	I acknowledge that I have received the Proxy form and understand the form.	Family
Family	Proxy 2 Form	I acknowledge that I have received the Proxy form and understand the form.	Family
Family	Forgot Documentation – ID/Address/Income	I acknowledge the ID/Address/Income I reported today is accurate and is recorded in my WIC record although I did not bring proof today. I acknowledge that I must bring proof of ID/Address/Income within 30 days to continue my participation in WIC.	Family

Family	No proof exists – ID/Address/Income	I acknowledge that the information I reported and is documented in the computer regarding my identity/address/income is correct and that I do not have proof as I am a victim of theft, fire, or I am unable to obtain a written verification letter.	Family
Family	Language Services Waiver	I understand that I have a right to be provided with free language assistance in order to communicate with WIC staff effectively. However, at this time, I DO NOT WANT LANGUAGE SERVICES to be provided to me.	Family
Client	Forgot Documentation – ID/Address/Income	I acknowledge the ID/Address/Income I reported today is accurate and is recorded in my WIC record although I did not bring proof today. I acknowledge that I must bring proof of ID/Address/Income within 30 days to continue my participation in WIC.	Client
Client	No proof exists – ID/Address/Income	I acknowledge that the information I reported and is documented in the computer regarding my identity/address/income is correct and that I do not have proof as I am a victim of theft, fire, or I am unable to obtain a written verification letter.	Client
Income	Zero Income	I declare that my total gross household income is ZERO. I understand that I am only able to declare ZERO income once in a lifetime. I acknowledge that I am currently receiving help with food/housing/basic needs on a temporary basis.	Family
Income	Income Ineligibility	I acknowledge that I have received a copy of the income ineligibility notice. I understand that I am not eligible based on my reported income and that I have the right to appeal.	Family
Income	Forgot Documentation – ID/Address/Income	I acknowledge the ID/Address/Income I reported today is accurate and is recorded in my WIC record although I did not bring proof today. I acknowledge that I must bring proof of ID/Address/Income within 30 days to continue my participation in WIC.	Family

Income	No proof exists – ID/Address/Income	I acknowledge that the information I reported and is also documented in the computer regarding my proof of identity/address/income is correct and that I do not have proof as I am a victim of theft, fire, or I am unable to obtain a written verification letter.	Family
Medical	Consent	I agree to allow WIC staff to take height, weight and screen for anemia for me and/or my children. I also give permission for WIC staff to physically touch me and/or my child if I request breastfeeding assistance.	Family
Medical	Rights and Obligations No Data Sharing	I understand my rights and obligations to participate in the WIC Program. I acknowledge that I have been given a copy of these rights and obligations in my WIC ID Folder.	Family
Medical	Rights and Obligations Data Sharing	I understand my rights and obligations to participate in the WIC Program. I acknowledge that I have been given a copy of these rights and obligations in my WIC ID Folder. I agree to share my information with the programs I selected and I understand I can change my selection at any time by telling the WIC staff.	Family
Medical	Second AR Rights and Obligations	I understand my rights and obligations to participate in the WIC Program. I acknowledge that I have been given a copy of these rights and obligations in my WIC ID Folder.	Family

13 SCANNED DOCUMENTS PAGE

Narrative:

The purpose of this page is to capture documents that have been scanned in for a specific Client and/or Family. The scans will be tied to the Client's record so that users can view it at any point in time. Scans are captured by pressing the scan button which appears on several pages throughout the WIC Services module. The user can view the title of the scan, when the scan was taken, and who performed the scan. A grid will exist on each page that contains a scan button that will display all scanned documents for that particular Client. The user who created the scan and on the same day that it was created has the ability to edit the scan title and description or delete the scan entirely. Any user can view and print the scanned images for all members of the Family by selecting the Scanned Documents & Signature page in the navigation drop down list when within a Client's record.

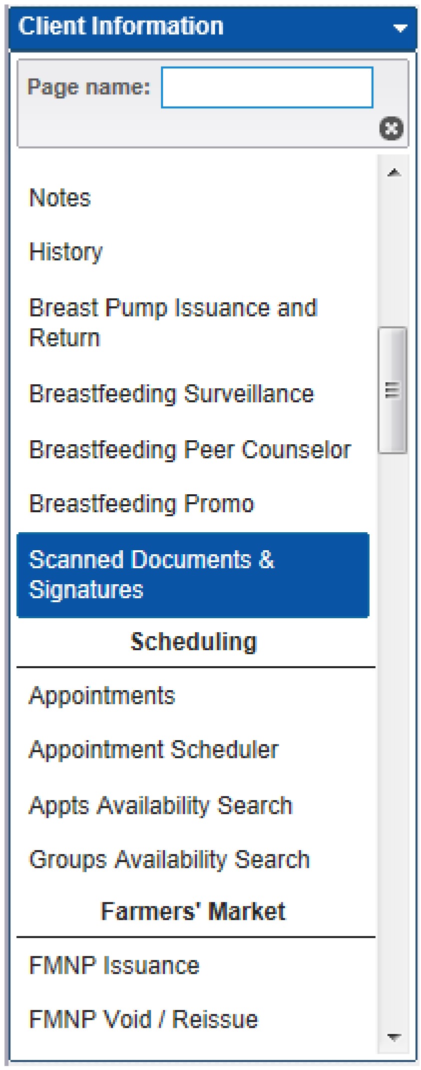
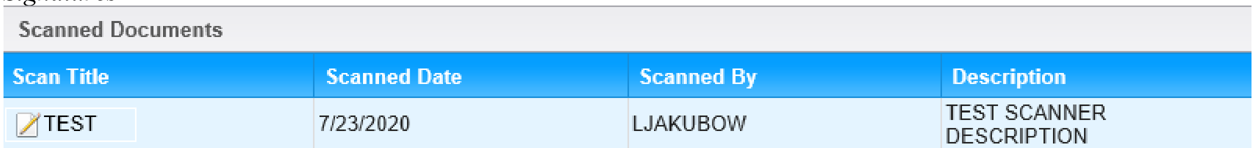


Figure 165: Scanned Documents & Signatures Navigation Drop Down List

Navigation Path: WIC Services tab | Client/Family Search | Navigation drop down list | Scanned Documents & Signatures



Scanned Documents

Scan Title	Scanned Date	Scanned By	Description
TEST	7/23/2020	LJAKUBOW	TEST SCANNER DESCRIPTION

Figure 166: Scanned Documents & Signatures Page

Fields:

- **Scan Title –** The tile of the scan record. Clicking on this field will give the user the ability to view the scanned document along with print it.
- **Scanned Date –** The date that the scan occurred. This field is display only.
- **Scanned By –** The logged in username of the user who took the scan. This field is display only.
- **Description –** A free form text field that allows the user to enter additional information about the scan. This field is display only.

Buttons:

- **(Scan Title) –** Press this button to bring up the view scan page.

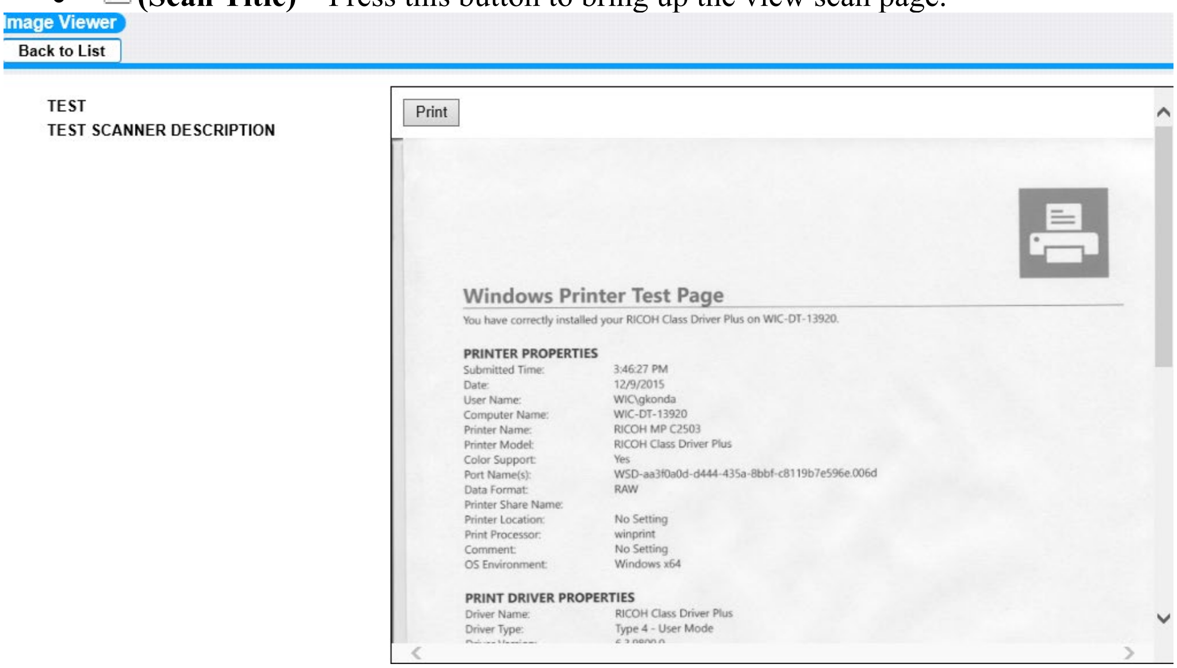


Figure 167: Print Scanned Document Page

Buttons:

- **Print –** Press this button to print the scanned image.
- **Back to List –** Press this button to return to the previous page.

Calculations: None

Background Processes: None

13.1 Add a New Scanned Document Page

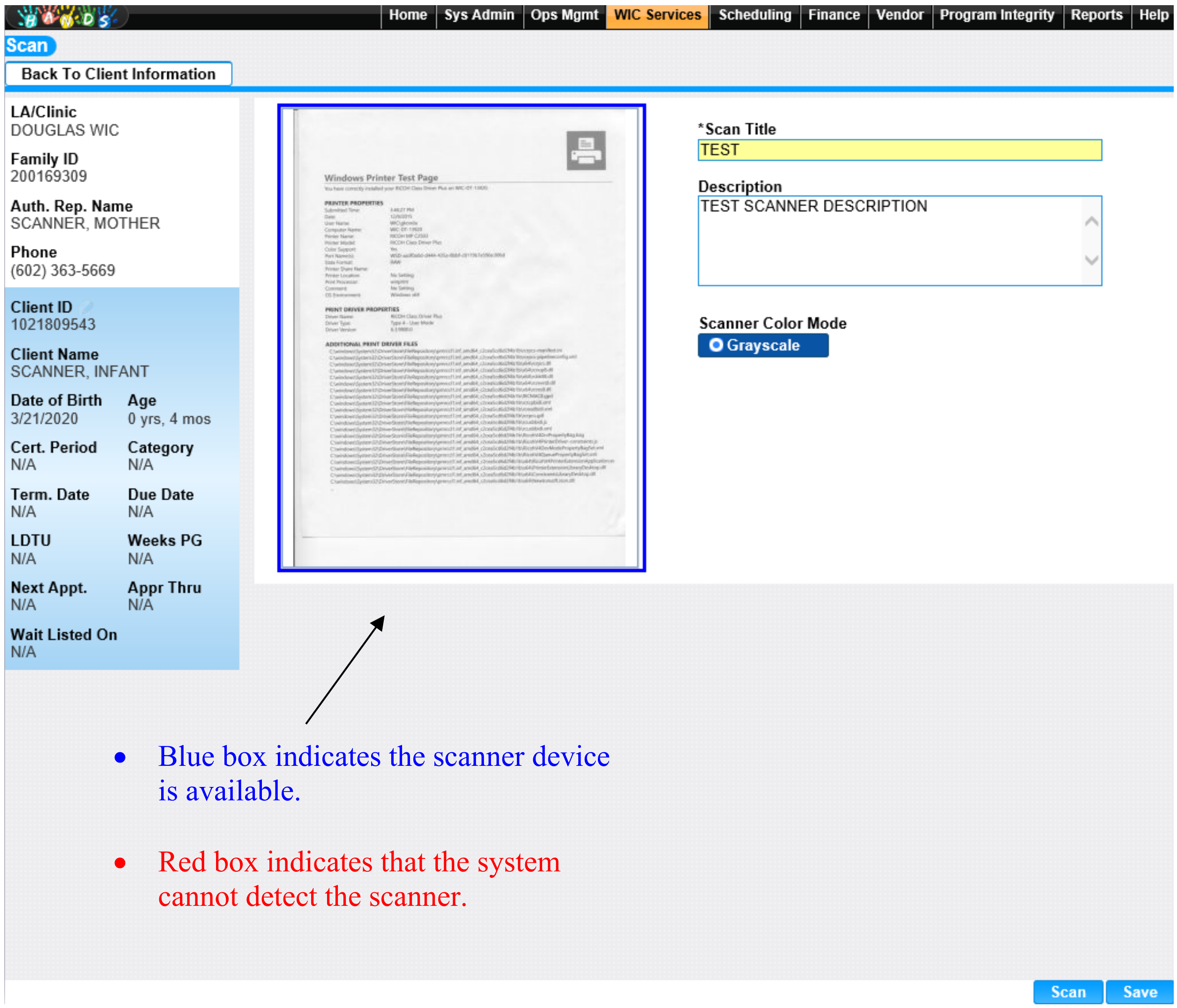


Figure 168: Add Signature Page

Fields:

- **Scan 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 system cannot detect the scanner. In addition to the red frame when there is no scanner connected the user will receive the message "Unable to communicate with scanner. Please verify that it is powered on and connected*
- **Scan Title –** The user specified title of the scan record. This field is mandatory.
- **Description –** A free form text field that allows the user to enter additional information about the scan. This field is optional.

Radio Buttons:

- **Scanner Color Mode –** Indicate the image will be grayscale (black & white).

Buttons:

- **Back to Client Information** – Cancel the Scan document action and returns user back to the Client Information page. If edits have been made the Save Confirmation modal will appear.
- **Scan** – Press this button to run the scanner and import the scanned image into the system. As the document is being scanned the system will display the Transferring data.. message indicating the remaining time left before the scan is complete.

  Note: If the system detects only one scanner connected to the user's computer the user will immediately see the Transferring data .. message. If the system detects multiple scanners attached to the user's computer, the Select the scanner modal will display to provide the user with the ability to select a specific scanner.

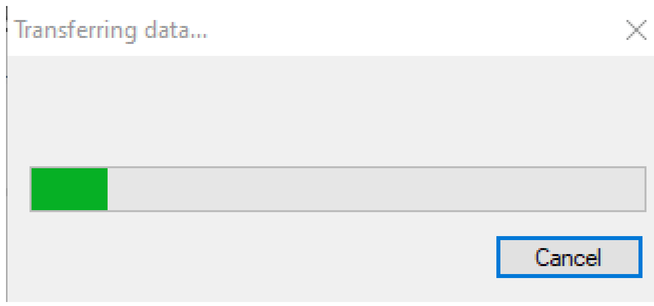


Figure 169: Transferring data… message – Displays when scan is in process

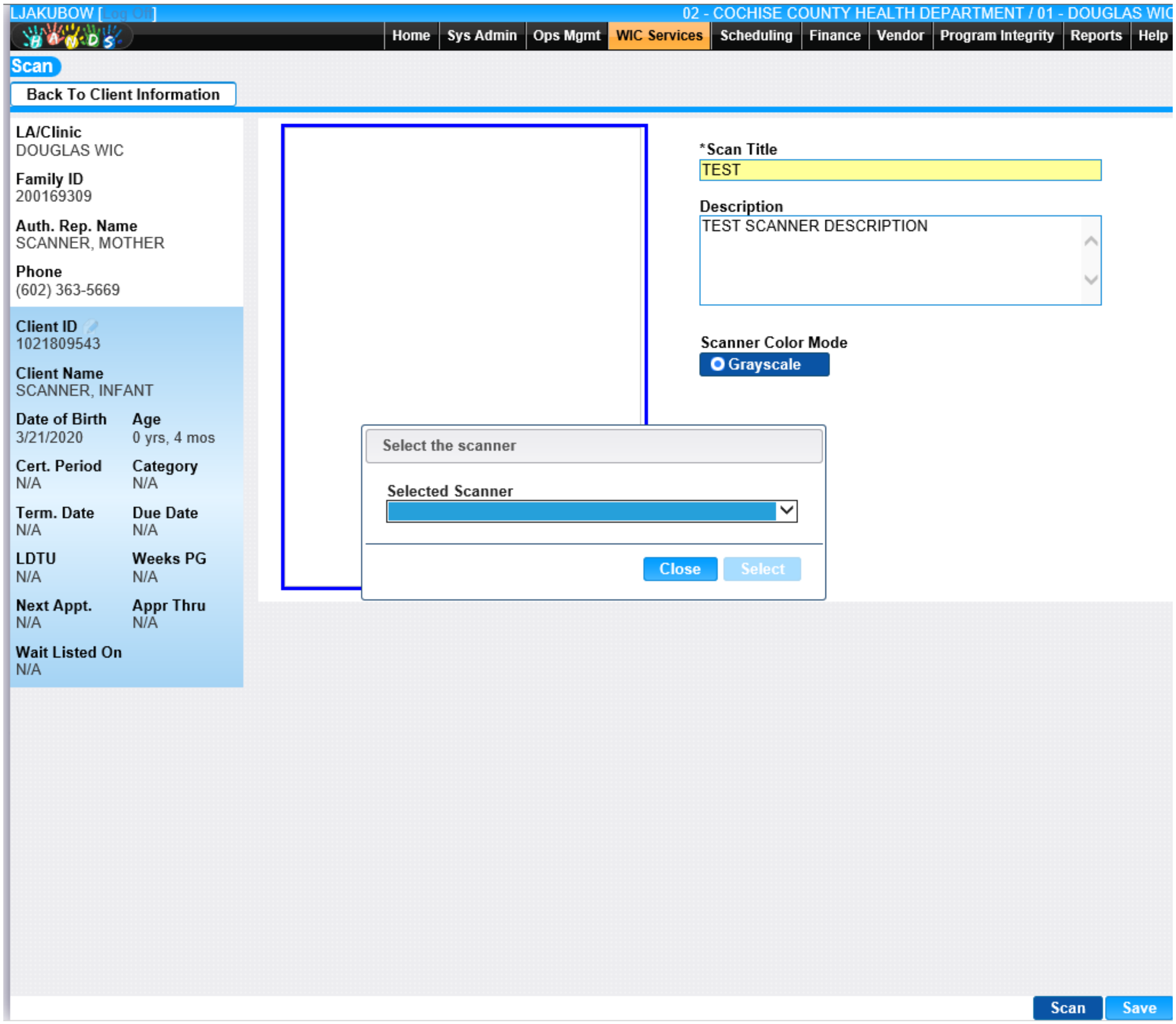


Figure 170: Select the scanner modal

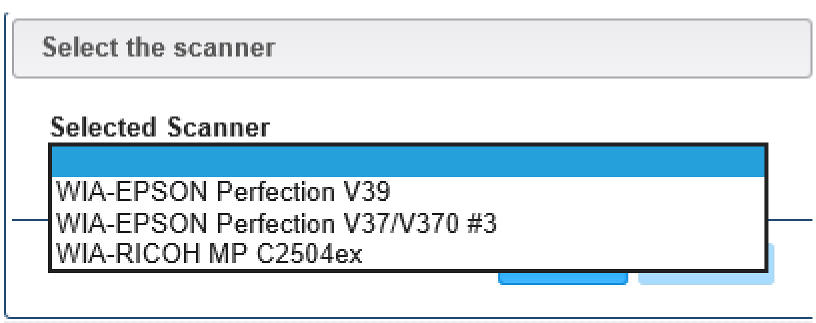


Figure 171: Example of the Selected Scanner drop-down menu

User selects a scanner from the drop-down menu and clicks the Select button.

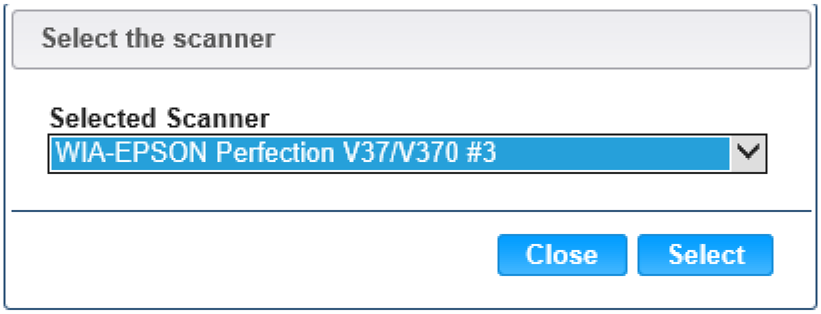


Figure 172: Select the scanner modal with Select button available

Drop-down

- **Select Scanner –** Select Drop-down lists available scanners.

Buttons:

- **Close –** Press this button to close the modal without selecting a scanner.
- **Select –** Button is only available after a scanner is chosen from the Selected Scanner drop-down menu. When clicked system will automatically begin scanning document.

- **Save –** Press this button to save the scanned image for the Client. For more information, see background process number one.

Calculations: None

Background Processes:

1) The system performs a four step save process when saving a new Family:
   a. First, it ensures all mandatory fields are populated with data. If not, the save process will stop and an error message will be thrown.
   b. Second, it ensures all fields have proper data entered (i.e. Fields that only accept numbers do not allow alphabetic characters to be saved). If not, the save process will stop and an error message will be thrown.
   c. Third, it ensures all fields do not exceed the maximum character amount allowed. If not, the save process will stop and an error message will be thrown.
   d. Finally, after the other three steps have been completed successfully the system adds the data to the database.

13.2 Edit a Scanned Document Page

Scanned Documents			
Scan Title	**Scanned Date**	**Scanned By**	**Description**
TEST	7/23/2020	LJAKUBOW	TEST SCANNER DESCRIPTION

Figure 169: Scanned Documents Edit Grid

NOTE: The Scanned Documents grid will be on each page that contains a scan button and display only documents scanned into the system on that particular page for that Client. All saved scans for the entire Family can be viewed on the scanned documents & signatures page.

Fields:

- **Scan Title –** The tile of the scan record. This field is mandatory.
- **Scanned Date –** The date that the scan occurred. This field is display only.
  Scanned By – The logged in username of the user who scanned the document. This field is display only.
- **Description –** A free form text field that allows the user to enter additional information about the scan. This field is display only.

Buttons:

- **(Scan Title) –** Press this button to bring up the view scan page.

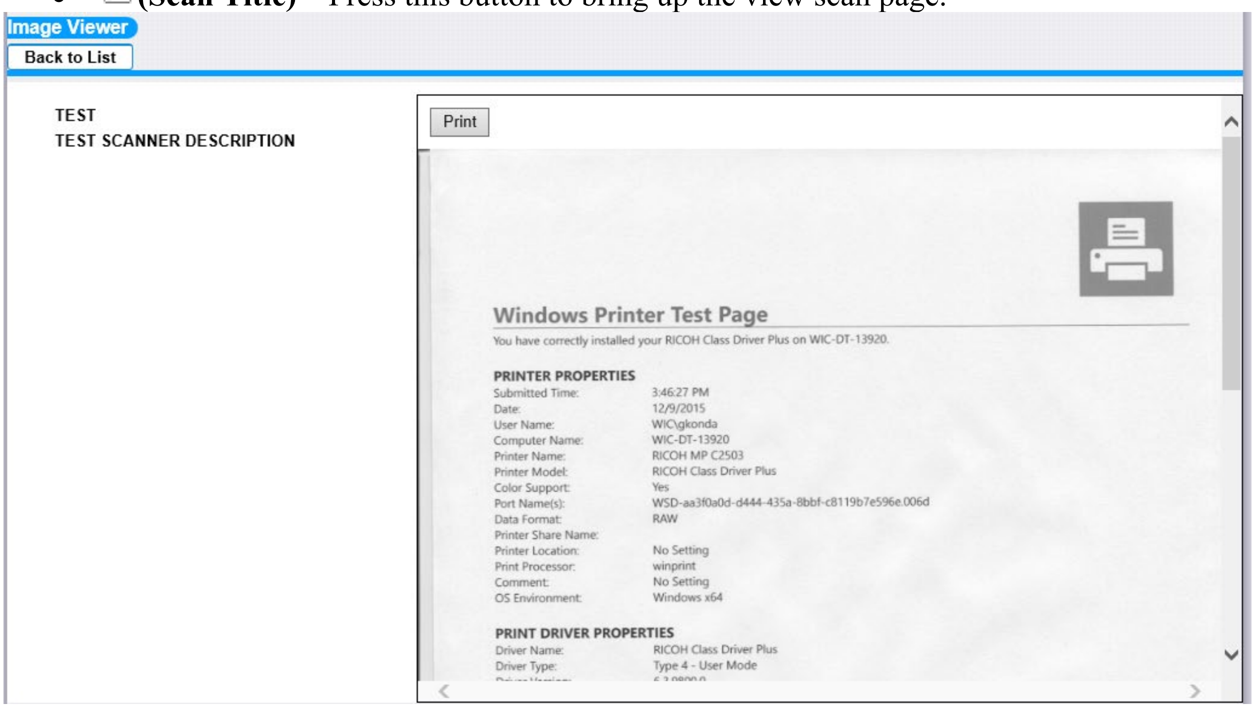


Figure 170: Print Scanned Document Page

Buttons:

- **Print –** Press this button to print the scanned image.
- **Back to List –** Press this button to return to the previous page.

- **(Edit Icon)** – Press this button to open up the edit page to allow for desired modifications to an existing record

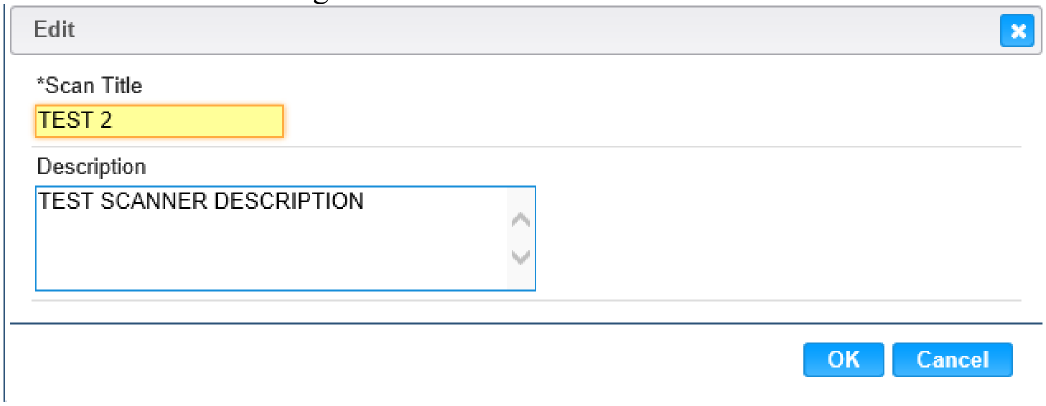


Figure 175: Edit Scanned Document Page

Fields:

- **Scan Title** – The tile of the scan record. This field is mandatory.
- **Description** – A free form text field that allows the user to enter additional information about the scan. This field is optional.

Buttons:

- **OK** – Press this button to close the modal and add the changes.

NOTE: Changes are not saved until the save button is pressed after the modal has closed.

- **Cancel** – Press this button to close the modal without changes being added.
- **(Close Window)** – The modal is closed without changes being added.

- **(Delete Icon)** – Press this button to remove an existing record.

NOTE: Edit and Delete changes will not become permanent until the page is saved.

Calculations: None

Background Processes:

1) An error message will be displayed for a user trying to edit a scanned document who cannot. Scanned documents can only be edited and deleted by the user that created them and on the same day that they were created.

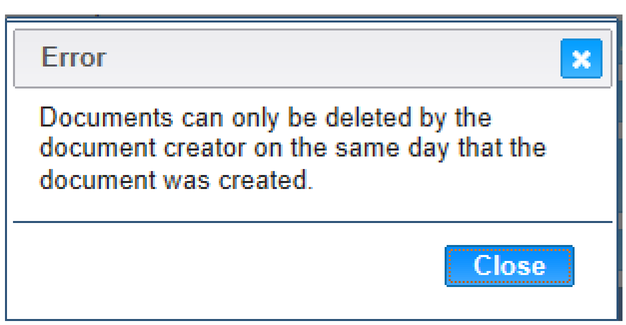


Figure 176: Cannot Delete Scan Record Error Message Modal

Buttons:

- **(Close Window) –** The modal is closed without adding a new record to the grid.
- **Close –** Pressing this button will close the modal without any changes being saved.

14 FORMS PAGE

Narrative:

The purpose of this page is to print informational documents, some which are mandatory. The user has the ability to print blank forms along with one's auto-populated with desired Client data. The user can print forms from either the Forms page by clicking the form button that appears on different pages within a Client's record throughout the WIC Services module. If the form button is clicked within a Client's record the form will be auto-populated with the Client/Family's data. A preview modal for the populated form will open.

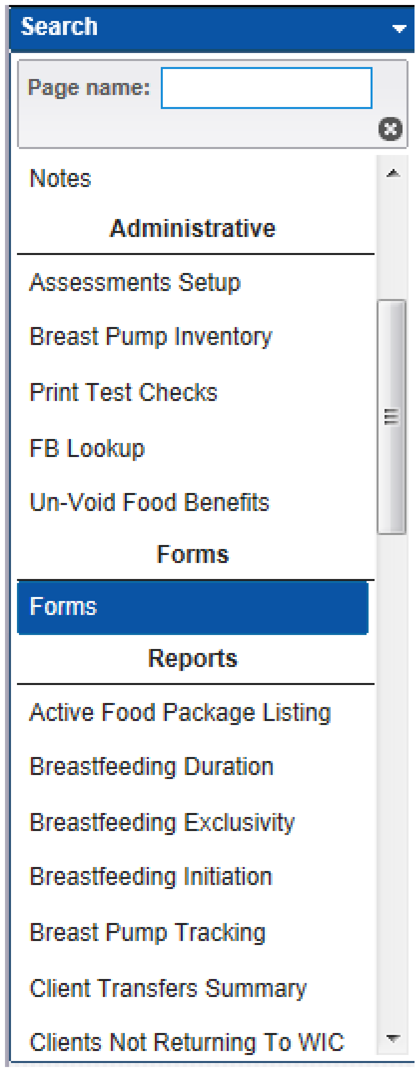


Figure 171: Forms Navigation Drop Down List

NOTE: The Forms option only appears in the navigation drop down list when in the WIC services module and not within the context of a Client's record.

Navigation Path: WIC Services tab | Client/Family Search | Navigation drop down list | Forms

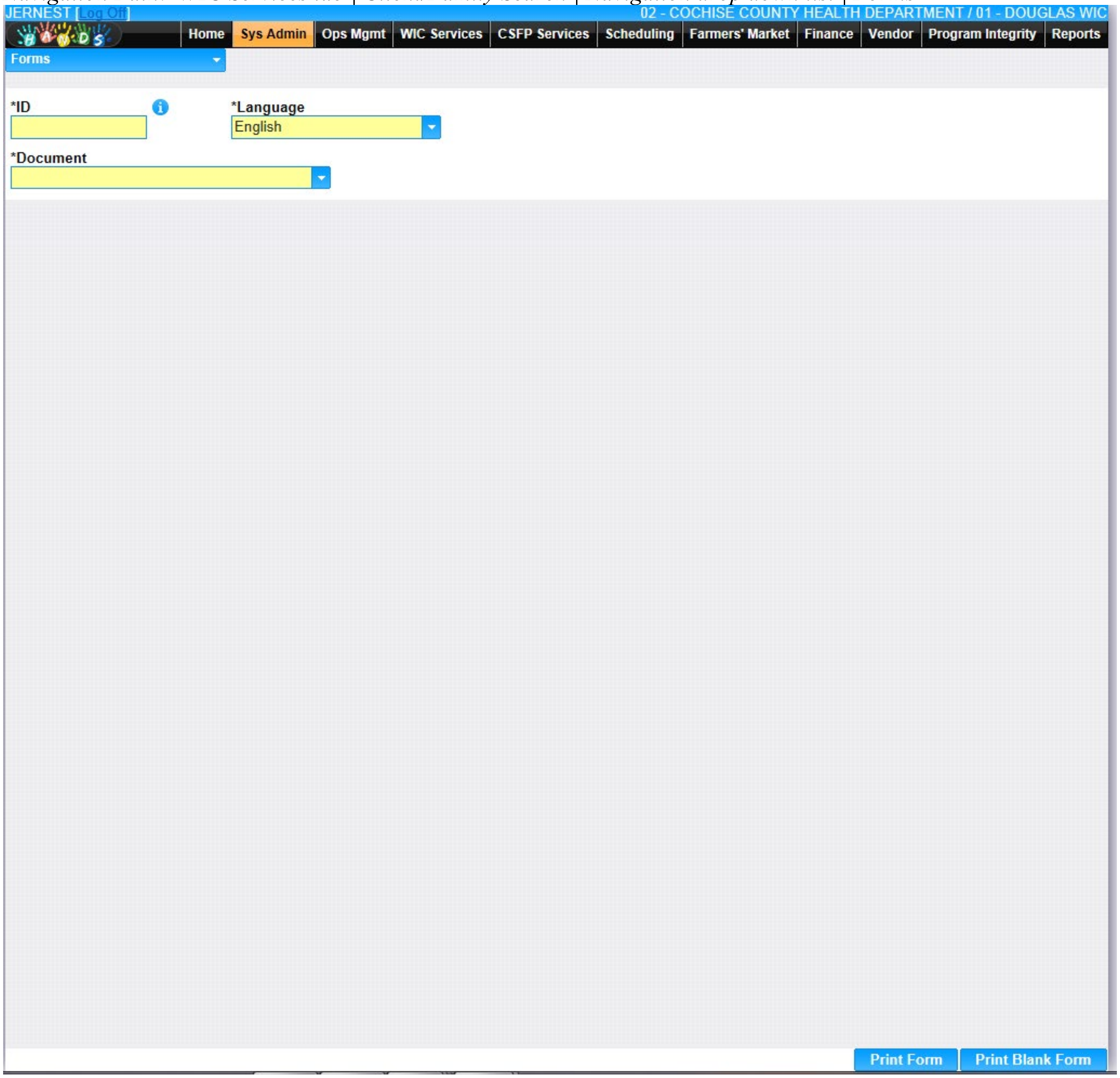


Figure 172: Forms Page

Fields:

- **ID –** The ID to be used to auto-populate the fields on the selected form document. This field is mandatory unless the user is printing a blank form. If the user hovers over the **(Information Icon)** with the mouse additional information will be displayed about what to enter as an ID inregards to the desired form.

*Language

ID	Form
Clinic ID/Local Agency ID	CIVIL RIGHTS COMPLAINT FORM
Client ID	CSFP NOTICE TO REAPPLY FORMS
Client ID	CARE PLAN FORM
Client ID	HOSPITAL GRADE DE PE FORMS
Client ID	PEER COUNSELOR REFERRAL
Client ID	NOTICE OF INELIGIBILITY FORMS
Client ID	PERSONAL USE DE BP RELEASE
Family ID	WIC RIGHTS AND OBLIGATIONS
Family ID	CSFP RIGHTS AND OBLIGATIONS
Client ID	CSFP VERIFICATION OF CERTIFICATION
Client ID	WIC VERIFICATION OF CERTIFICATION
Family ID	CSFP PROXY FORM
Client ID	CSFP WAIVER
Client ID	WIC WAIVER
Family ID	WIC PROXY FORM

Figure 179: Form ID – Additional Information

- **Language –** The language that the form is to be populated in. This field is mandatory and defaults to English.

NOTE: Forms can only be populated in English or Spanish.

- **Document –** The form to be populated. This field is mandatory and selected from a drop down list.

Buttons:

- **Print Button –** Press this button to print the selected form document based on the entered ID.
- **Print Blank Form –** Press this button to print a blank version of the selected form document regardless if information is entered in the ID field.

Calculations: None

Background Processes:

1) An adobe print form preview modal will appear after the user has selected the form they wish to print and have pressed the print button.

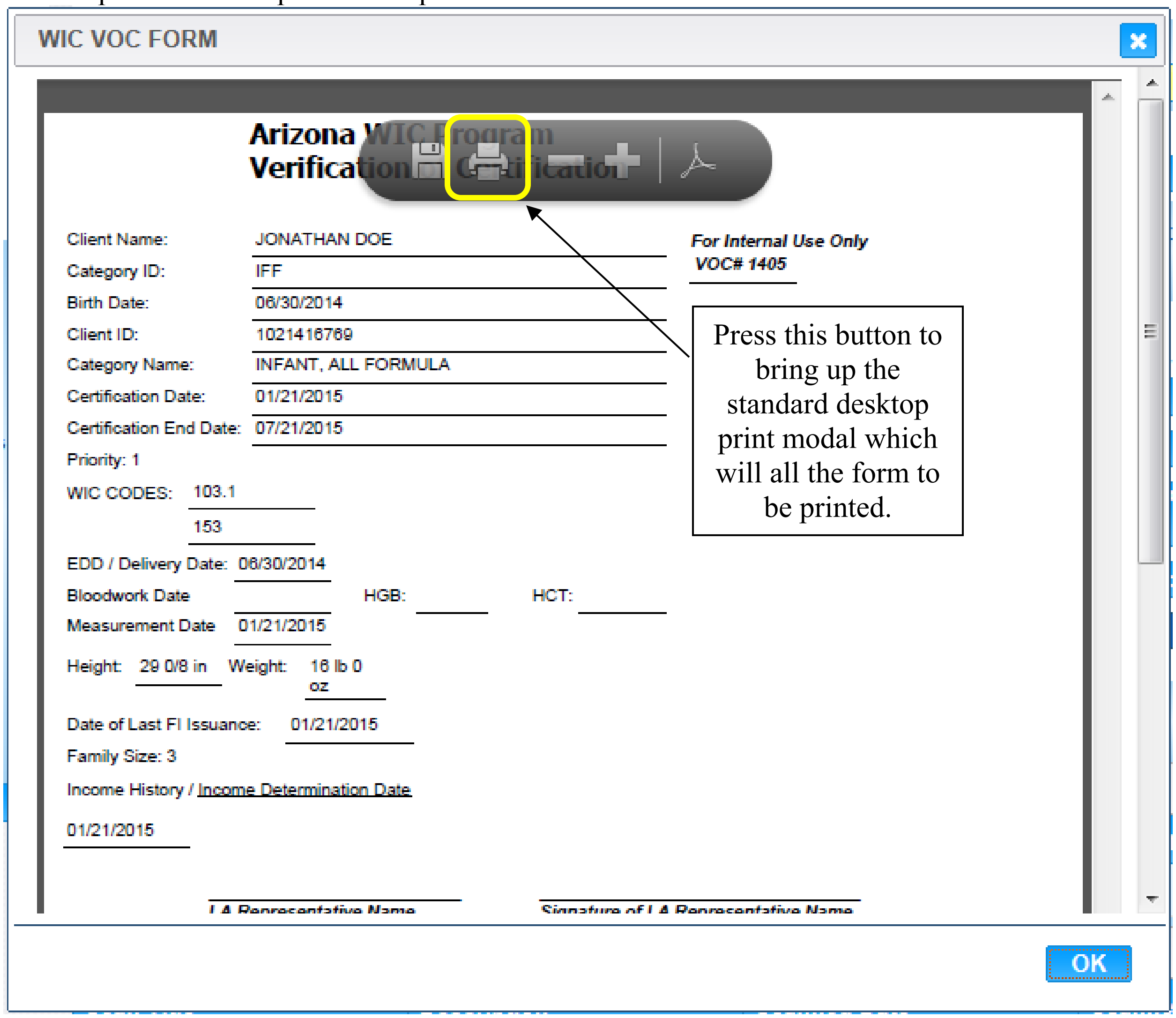
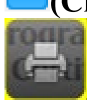


Figure 180: Print Form Preview Modal

Buttons:

- **OK** – Press this button to close the print form preview modal without printing the form.
- **(Close Window)** – The modal is closed without changes being added.
- **(Adobe Print)** – Press this button once the form has been populated to open the standard desktop print modal. This desktop print modal will allow for multiple copies of the form to be printed and allow for multiple printers to be used to print forms.

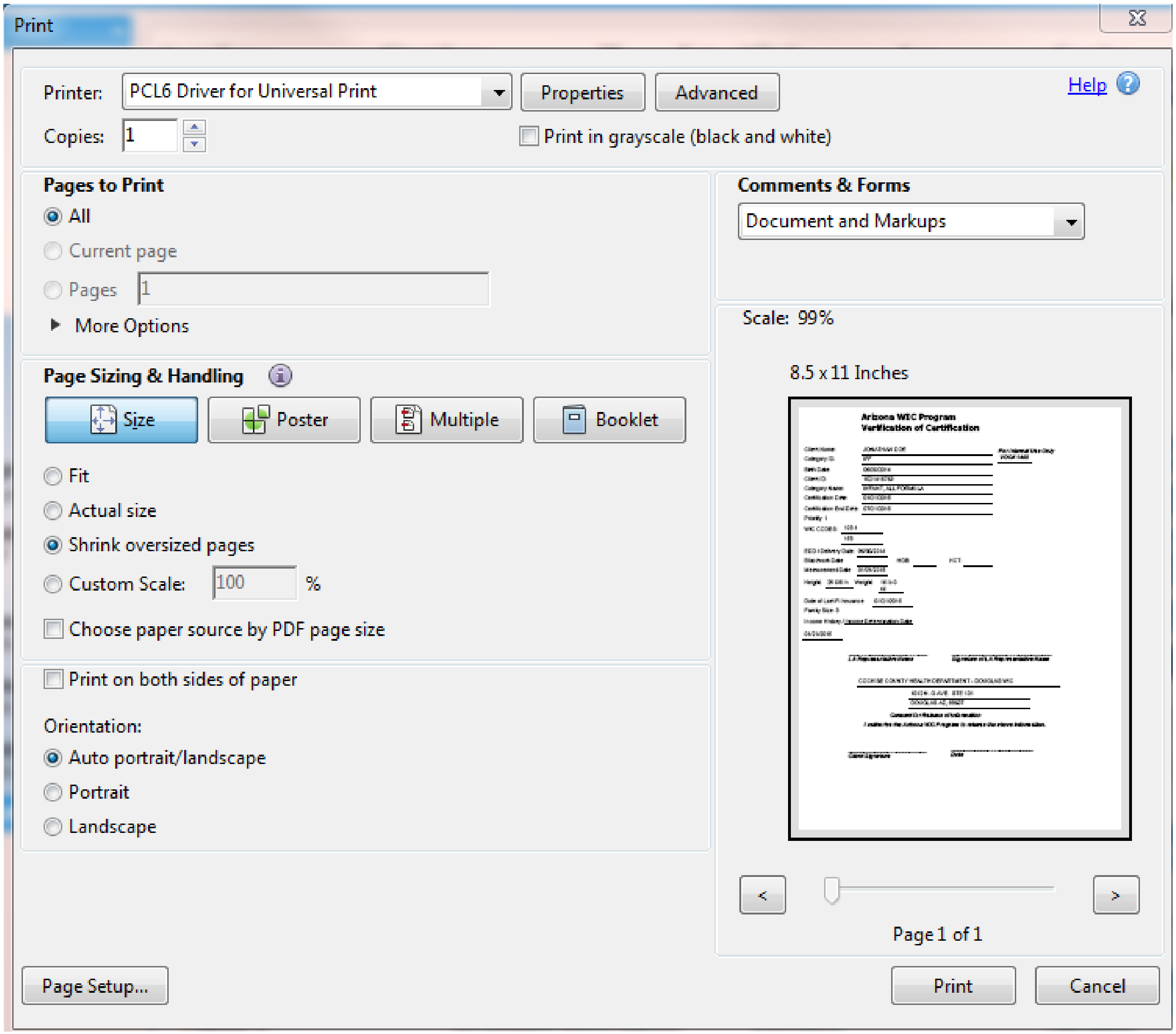


Figure 181: Standard Desktop Print Modal

NOTE: All forms will use the same print form preview modal and standard desktop print modal.

2) The following table contains all of the WIC Services forms. The first column is the name of the form, second column contains the language that the form can be printed in, third column contains which fields will be auto-populated on the form, and the final column contains any logic that may occur behind a field on the form.

3)

Form	Lanaguage	Auto-Populated Fields	Logic
Civil Rights Complaint	English / Spanish	1) Local Agency and Clinic Name 2) Clinic Street Address, City, State, and ZIP Code	N/A

Notice of Ineligibility	English / Spanish	1) Client Name: First Name, Middle Initial, Last Name 2) WIC or CSFP Checkbox 3) Ineligibility Reason 4) Disqualification Date or Ineligibility Date	1) WIC or CSFP Checkbox will be marked based on what program the Client is enrolled in. 2) Ineligibility Reason will only appear for the program that the user is enrolled in. 3) Disqulification Date or Ineligibility Date will be populated with current date unless a disqualification date exists for the Client.
Offer of Voter Registration	English / Spanish	N/A	N/A
Proxy Form	English / Spanish	N/A	N/A
Verification of Certification (VOC) *NOTE: For more information, see background process number three.*	English / Spanish	1) Client Name: First Name, Middle Initial, Last Name 2) Current Client Category ID along with Category Description 3) Client Date of Birth 4) Client ID 5) Certification Start and End Dates 6) Priority 7) WIC Codes assigned to the Client 8) Expected Delivery Date or Actual Delivery Date 9) Current Blood Work Date along with current HGB and/or HCT 10) Current Measurment Date along with current Height and Weight values 11) Date of Last FI Issued 12) Family Size	1) VOC# is the unique system generated sequence number assigned to the populated verification of certifcation form. 2) Clinic Phone Number will be populated with the primary phone number of the Clinic only. If a primary phone number does not exist for the Clinic N/A will be displayed. The number will be in the standard format of (XXX) XXX - XXXX.

		13) Income History / Income Determination Date 14) System Assigned VOC# 15) Local Agency and Clinic Name 16) Clinic Street Address, City, State, and ZIP Code 17) Clinic Phone Number	
WIC Waiver	English / Spanish	1) Client Name: First Name, Middle Name, Last Name	N/A

1) The verification of certification is the form printed for Client's who are leaving the state and need all of there information so that they may transfer to another program to receive benefits in another state. This form is accessed by pressing the print VOC form button on the Client information page. If the Client is within an active certification a print VOC modal will open asking the user if they wish to terminate the certifition and then print the form or just print the form without terminating the Client.

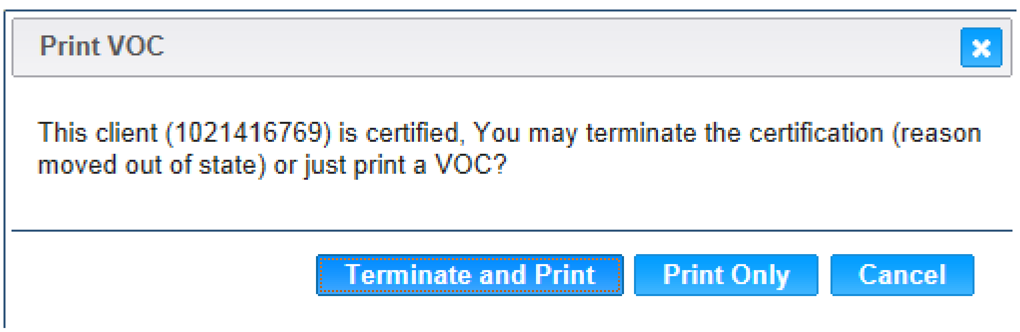


Figure 1732: Print VOC Form Modal

Buttons:

- **Terminate and Print** – Press this button to terminate the selected Clients active certification with a termination reason of moved out of state and populate the VOC form.
- **Print Only** – Press this button to populate the VOC form without terminating the selected Clients active certification.
- **Cancel** – Press this button to close the modal without the VOC form being populated.
- **(Close Window)** – The modal is closed without changes being added.

Background Processes:

1) When the VOC form is populated by using either the terminate and print or print only button the Client record is assigned a unique, system generated identification number. This number will be automatically

linked to the Client's record. Therefore, if the user decides not to print the form now and closes the modal the same VOC# will be assigned to the Client the next time either of the print buttons are pressed.

15 PARTICIPANT PORTAL

15.1 Overview:

Participant Portal is a self-service portal providing participants with information and assistance for a family registration.

Applicants who are potentially WIC eligible will submit their Precertification information through the Portal. Once submitted from the Portal that data will be sent to HANDS.

A new search screen by name **Participant Portal has been added in HANDS under WIC Services menu option** to filter online applicants, so that state staff can review and accept those. State staff can Search, Review and Approve OR Reject online applicants through this screen.

User can select the Scope of the search by clicking the radio button next to either Clinic, Agency, or State. The Scope will default to Clinic. The Local Agency/Clinic Name field will limit the search to the Local Agency or Clinic selected from the drop down pick list based on whether the Local Agency or Clinic radio button is selected. As of now, ONLY State level users can Approve or Reject an online applicant from this screen. Clinic users can search and view the records but cannot Approve OR Reject. Approve and Reject buttons will be disabled for users who are logged on at Clinic level.

The user can find desired online applicant records by entering known Auth. Rep. 1 Last Name, Auth. Rep. 1 First Name, Last Name, First Name of the client/family member data into the search criteria fields and pressing the search button. The more information provided, the narrower the search will be. (If a last name was the only piece of information entered, the system will retrieve all Client records possessing the same last name with their corresponding information.) In addition, user may choose to enter values in Gender (M or F), Client DOB and/or Phone number.

On click of the Search button, search results (matching the search criteria provided) with the list of clients enrolled through Participant Portal is displayed in Search Results grid.

User may expand the record and view more Family information by clicking the plus sign to the left of the Client Name field. The plus sign will become a minus sign once the record information is expanded. The user then simply clicks the minus sign to minimize the additional Client and Family information.

Once the appropriate client record is located, the user may select that record by checking the checkbox next to the client in the grid and click the Approve OR Reject button to either Approve OR Reject an applicant. Once the record is approved, system navigates to Family Screen under Family tab under WIC Services.

If the system finds that values are missing or incorrect in the required fields for a potentially eligible client selected for approval, it shows appropriate error message and prevents approval of the applicant.

If the system finds potential duplicate in HANDS matching the attributes of the client selected for approval, system displays a Potential Duplicate Pop-up. User may choose to either Approve OR Reject the client.

If there are more clients pending for approval in the same family in addition to the selected applicant for approval, system approves the selected client and displays a message to the user whether they want to review other clients in the family. User may choose to review by clicking "Yes" wherein the system will return back to search results, if the user clicks "No" then system will navigate to Family Screen under Family tab under WIC Services with the details of the applicant just approved.

If the applicant record is rejected then system refreshes the Participant Portal page so that user may choose to search for online applicants again and continue the operation. User may choose to click the New Search button to clear search criteria and results and start over.

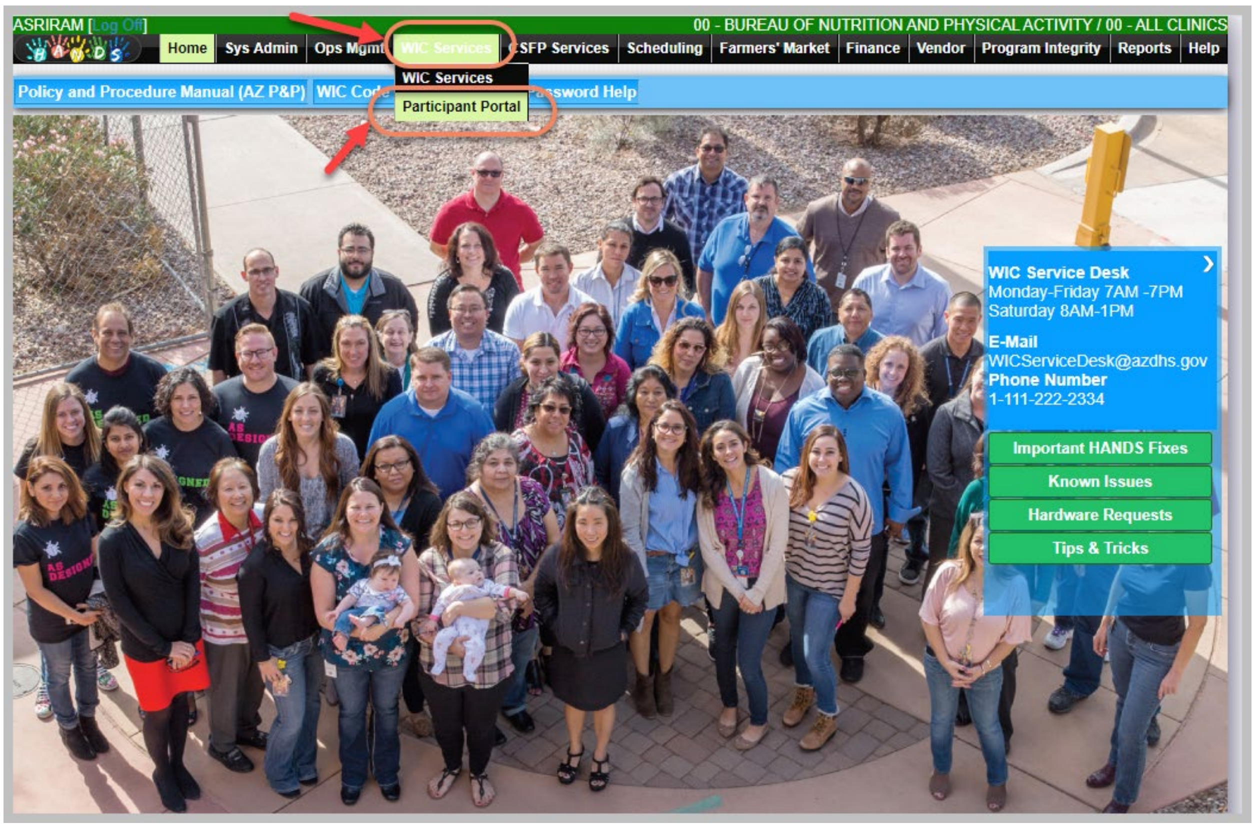


Figure 183: WIC Services – Participant Portal menu option

15.2 Search registered clients

Narrative:

The purpose of this page is to filter online applicants, so that staff can review and accept those. Staff can Search, Review and Approve OR Reject online applicants through this screen.

Navigation Path: WIC Services | Participant Portal

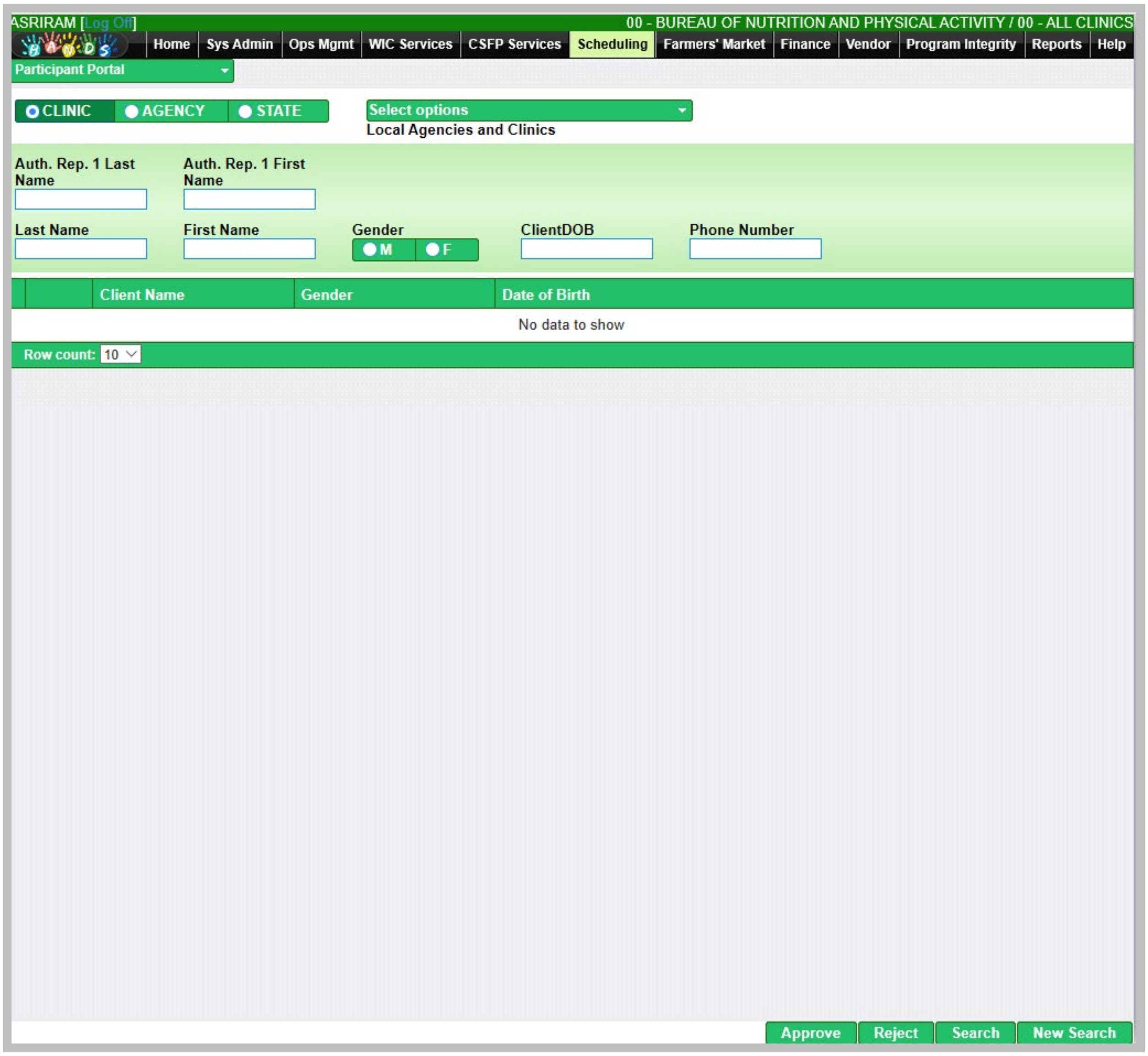


Figure 174:WIC Services – Participant Portal Search Page

Fields:

- **Clinic, Agency, State –** The organizational unit to search.
- **Local Agencies and Clinics** - The organizational unit that serves as the Local Agency and Clinics that the Family is registered in. This field is optional and is selected from a drop down list. *This field is only available when logged in at the State level*
- **Auth. Rep. 1 Last Name -** The last name of the first authorized representative for the Family. This field is optional.
- **Auth. Rep. 1 First Name -** The first name of the first authorized representative for the Family. This field is optional.
- **Last Name -** The last name of the Client. This field is optional.
- **First Name -** The first name of the Client. This field is optional.
- **Gender** - The gender of the Client**.** This field is optional.
- **ClientDOB** - The birth date of the Client. This field is optional.
- **Phone Number –** The telephone number of the Family. This field is optional.

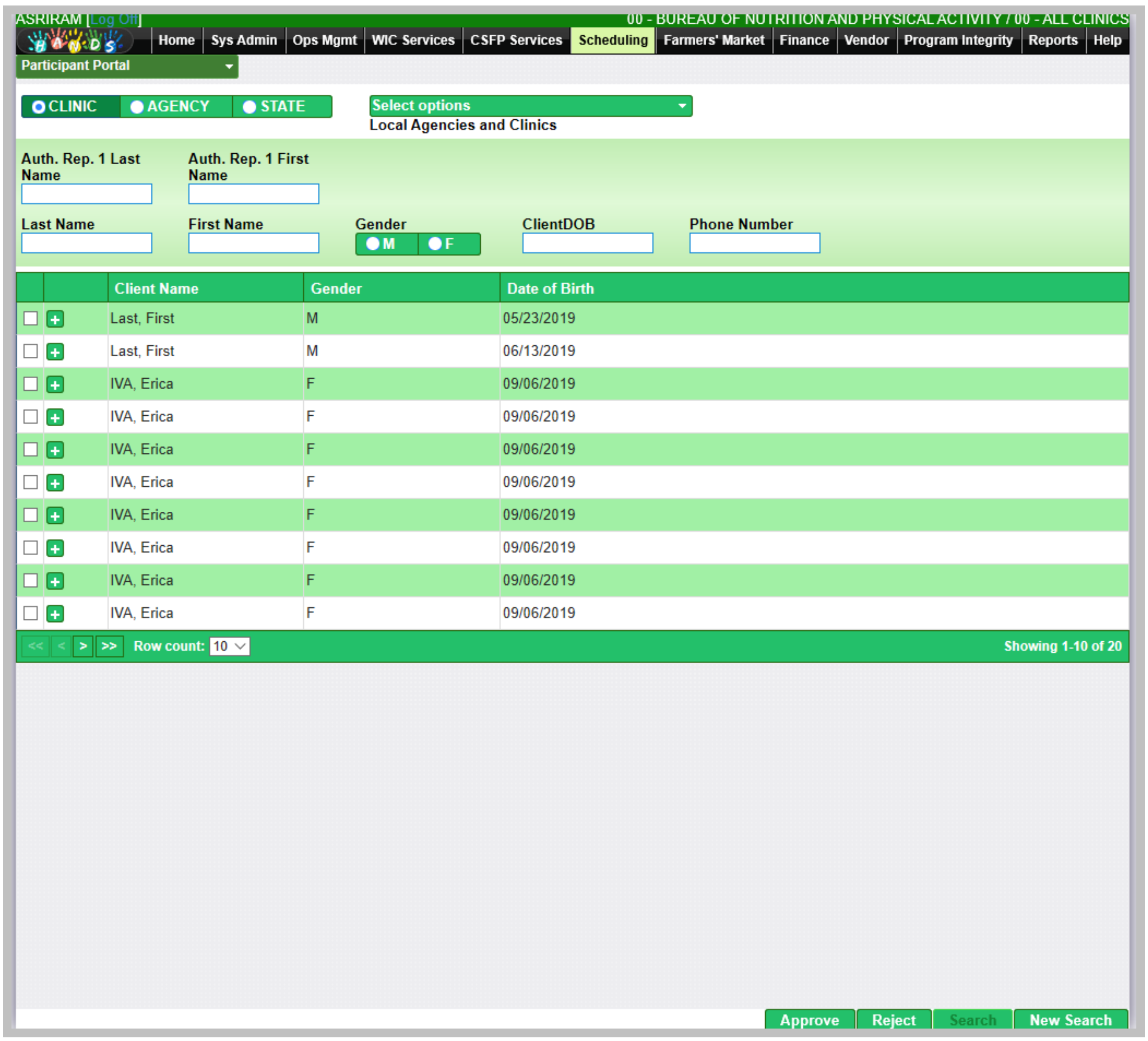


Figure 175:WIC Services – Participant Portal Search Results with list of clients enrolled

Fields (Results section):

- **Client Name -** The last name, first name, and middle initial of the Client. This field is display only.
- **Gender** - The gender of the Client. This field is display only.
- **Date of Birth -** The birth date of the Client. This field is display only.

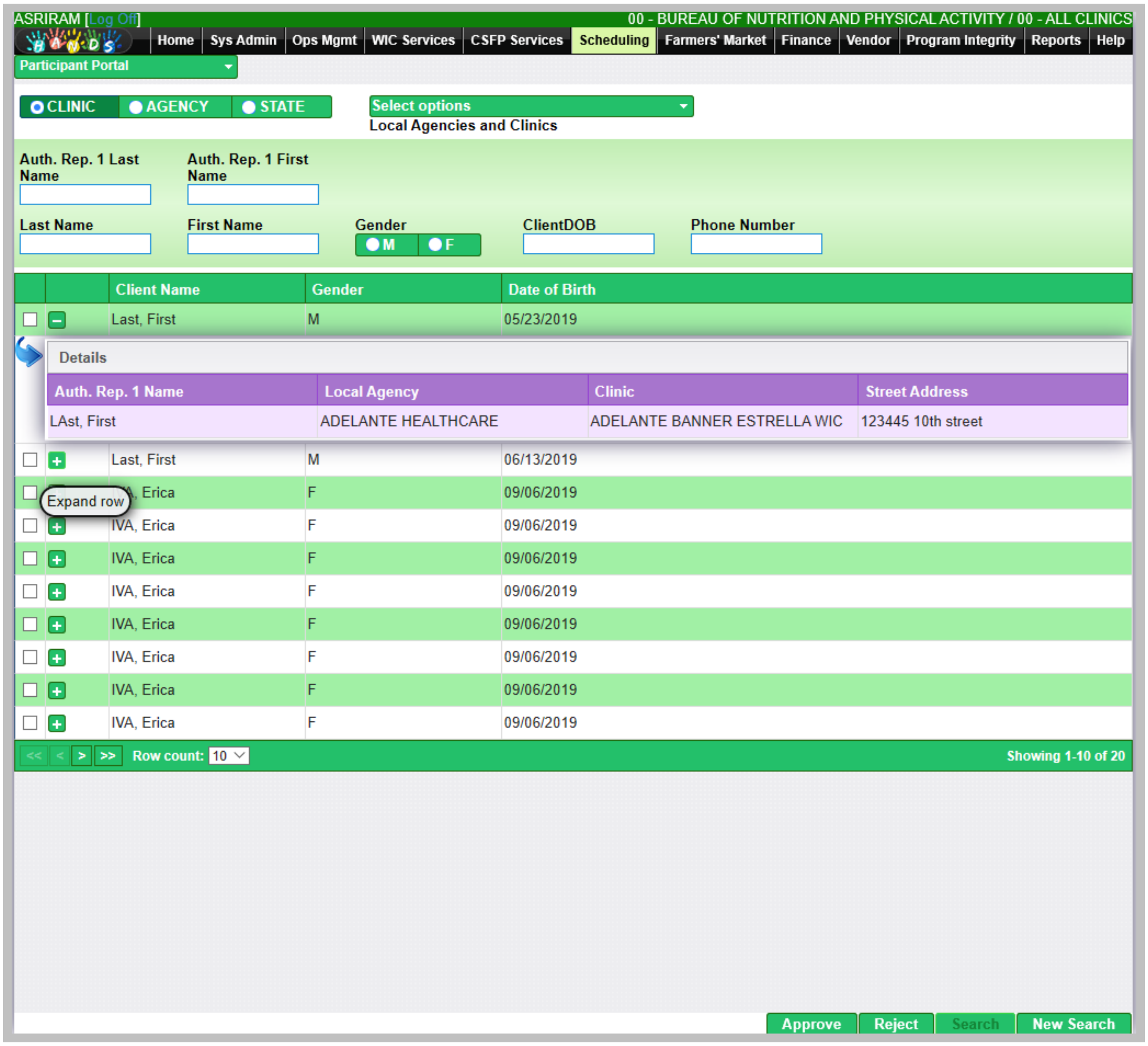


Figure 176:WIC Services – Participant Portal Family details expanded by a click on plus sign

Fields (Expanded Search Results section):

- **Auth. Rep. 1 Name -** The last name and first name of the first authorized representative. This field is display only.
- **Auth. Rep. DOB –** The date of birth of the first authorized representative. This field is display only.
- **Local Agency -** The organizational unit that serves as the Local Agency that the Family is registered in. This field is display only.
- **Clinic -** The organizational unit that serves as the Clinic that the Family is registered in. This field is display only.
- **Street Address -** The mailing address for the Family. This field is display only.

Buttons:

- **Gender** - Selection options (M and F) to determine the gender of the Client.
- **Agency/Clinic/Statewide -** Selection options (Clinic, Agency, and Statewide) to determine the demographic range of the search results returned
- **Approve** – Press this button to approve selected applicant(s)/client(s) from the search results grid.
- **Reject** - Press this button to Reject a selected applicant(s)/client(s) from the search results grid
- **Search -** Press this button to execute query of search criteria entered.
- **New Search -** Press this button to clear search criteria and results.

Calculation(s): None

Background Processes:

1) Searching by a phone number will return all applicant records that match the phone number entered. The query will look at all numbers entered for the family if multiple exist.
2) For partial match searches, the 'wildcard' will be assumed on the end of the search. A "starts with" process will be on each field. If a query is executed and no matches are found, the criteria entered remains on the screen, the cursor remains in the criteria field, and the results section of the screen display a "No data to show" message. If no criteria are entered and the query is executed, the system retrieves all Clients in the database.

15.3 Approve an online client

Narrative:

Purpose is to approve an applicant/client by selecting the client from search results.

Navigation Path: WIC Services | Participant Portal

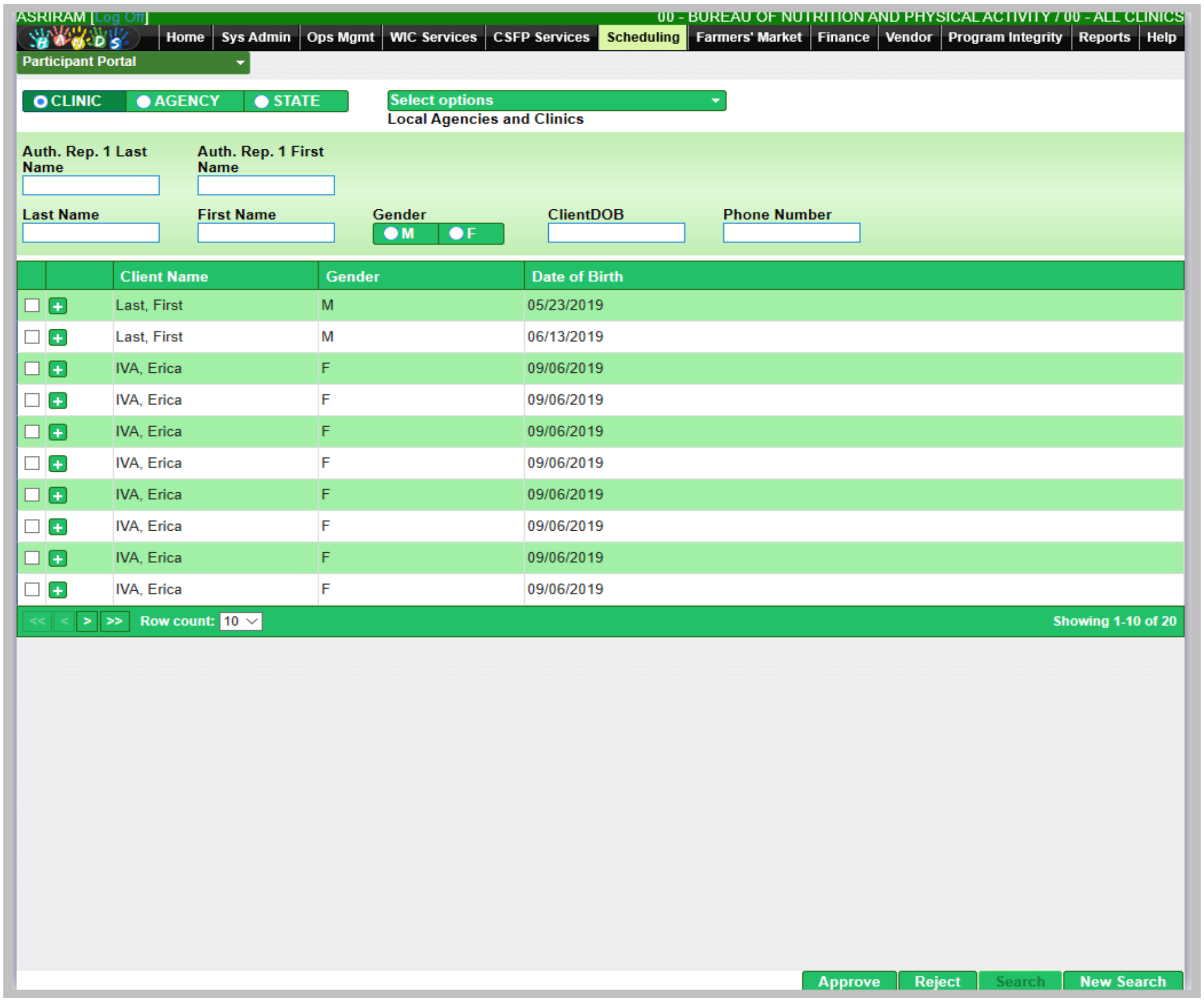


Figure 177: WIC Services – Search Results with list of clients enrolled through Portal

Buttons:

- **Approve** – Press this button to approve a selected client from the search results grid.

Calculation(s): None

Background Processes:

When **Approval button is clicked** by the user following checks are performed by the system:

1) System checks whether at least one client record has been selected for approval. If not, an error message will be displayed saying "Please select a client to approve registration" with a OK button.

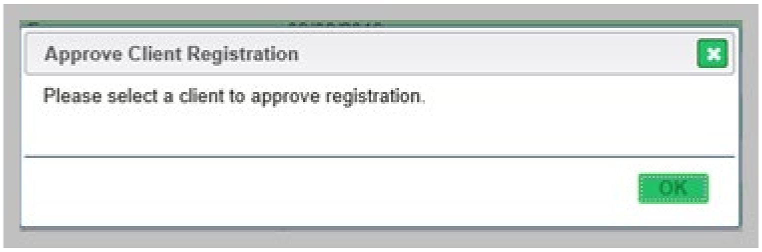


Figure 178:WIC Services – Participant Portal- Pop-up to prompt the user to select a record

2) **If a client record is selected from the search results and Approval Button is clicked**, System checks for missing or incorrect values in the registered client record. If found shows an error message "The following data is either missing or incorrect: fieldname". Example is shown below for incorrect or missing EMAIL_ADDRESS.

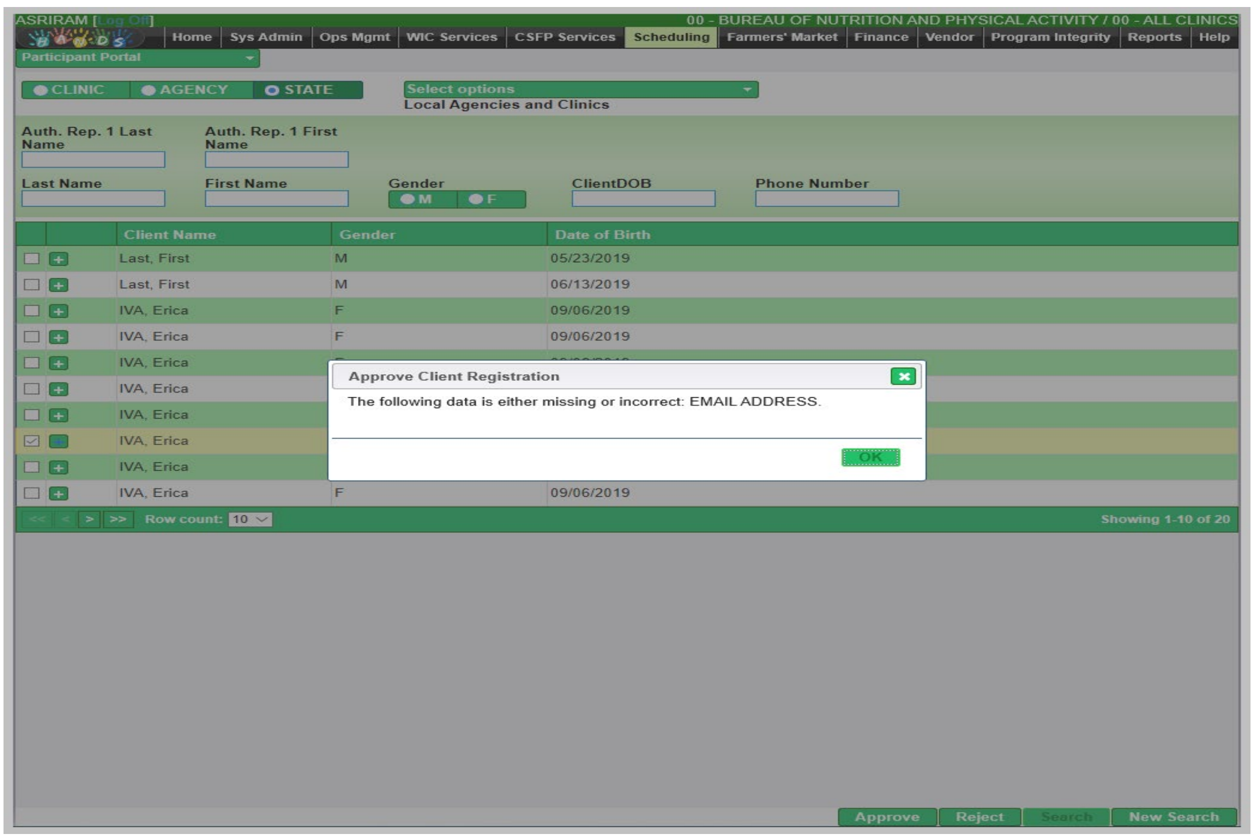


Figure 179:WIC Services – Validation to check for required fields to approve a client

Buttons:

- **OK** – Press this button to close Pop-up with error message. System will navigate back to search results under Participant Portal page.

3) **<u>If a client record is selected from the search results and Approval Button is clicked and there are no missing or incorrect values then,</u>**

    1. System checks whether a record already exists in HANDS with the registered details. If a duplicate is found, system will display a pop-up with Potential Duplicate Client Record.

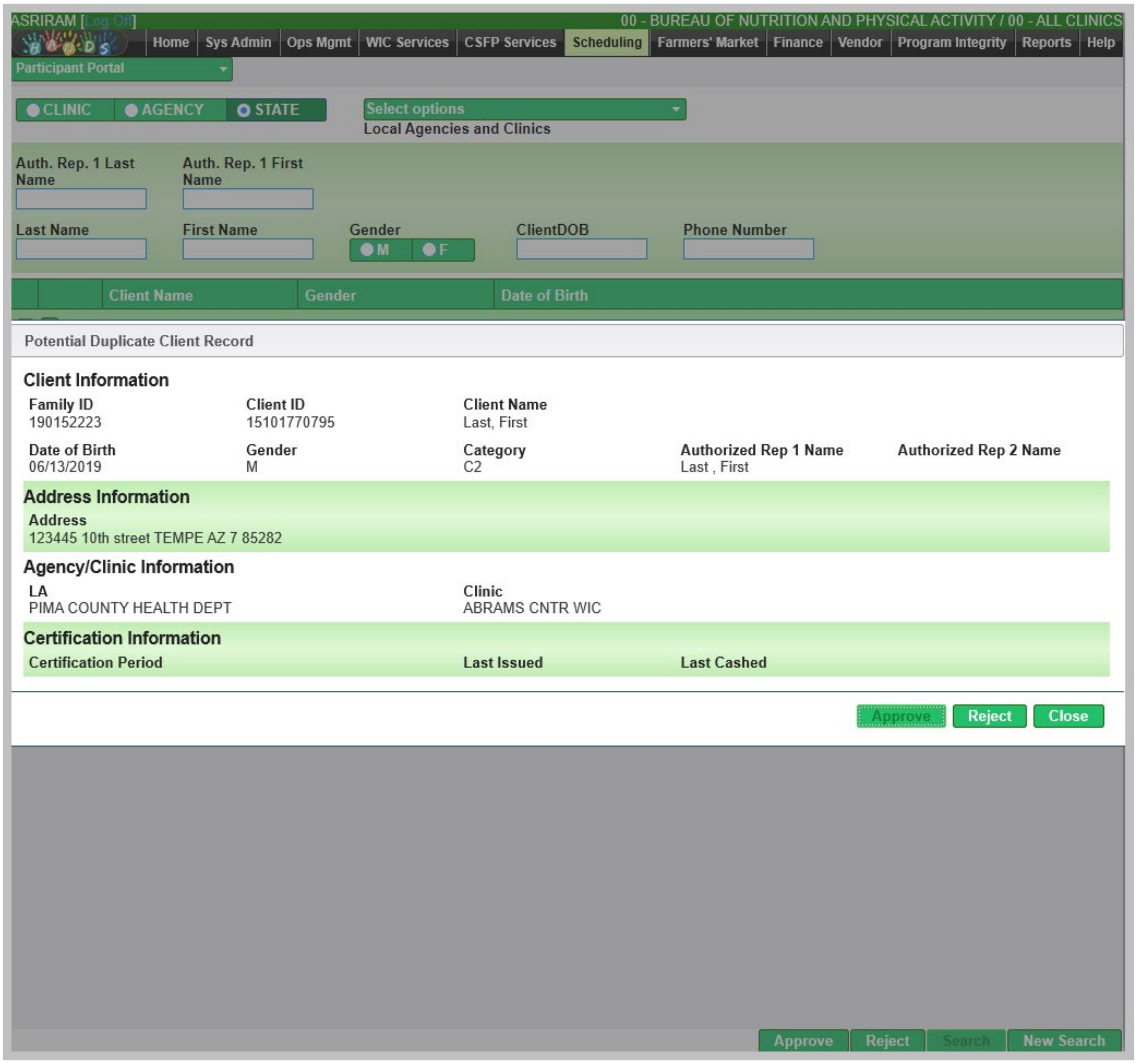


Figure 180:WIC Services – Potential Duplicate Client Record

Buttons:

- **Approve** – Press this button to approve the client from the Potential Duplicate pop-up. Once approved, system will navigate to Family Information Screen under WIC Services filled with details of approved client.
- **Reject –** Press this button to reject the client from the Potential Duplicate pop-up. Once rejected, system will display a message saying, "Client Registration rejected" with an OK button. Click OK for system to refresh the Participant Portal page. Subsequently, Participant Portal page will be ready for a new search operation.
- **Close** – Press this button to close Potential Duplicate pop-up. System will navigate back to search results under Participant Portal page.

2. If there are no duplicates found, System checks whether ***more clients are pending for approval in the same family in addition to the client selected for approval***. If there are , system approves the selected client for approval and will display a message saying, "There are 1 more client(s) in the family do you want to review?" with Yes and No button.

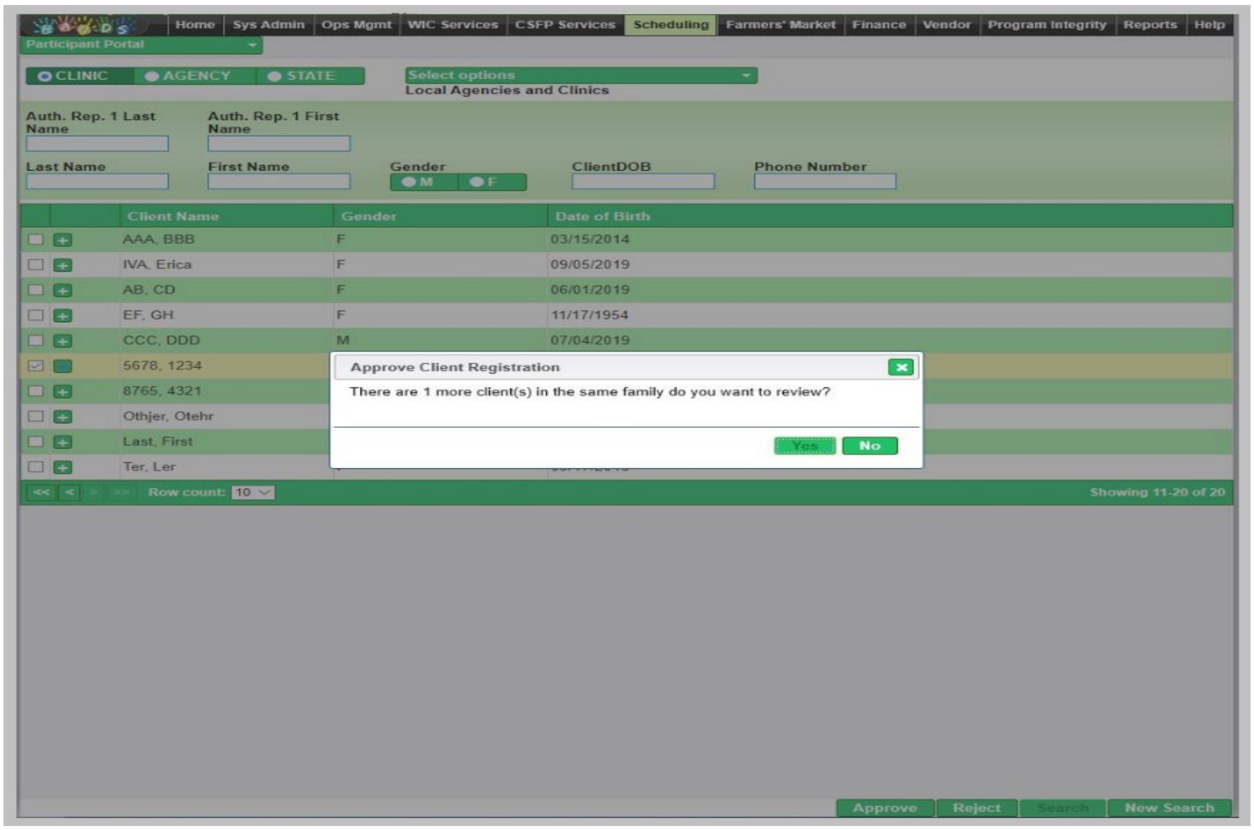


*Figure 181:WIC Services – Participant Portal - more clients pending for approval in the same **family***

Buttons:

- **Yes** – Press this button to go back to Search results in the Participant Portal.
- **No**– Press this button to be redirected to Family Information Screen under WIC Services filled with details of the client just approved.

3. ***If there are no additional clients pending for approval in the same family and it is the only client to be approved,*** system will display a message saying, “Client Registration approved successfully” with an OK button.

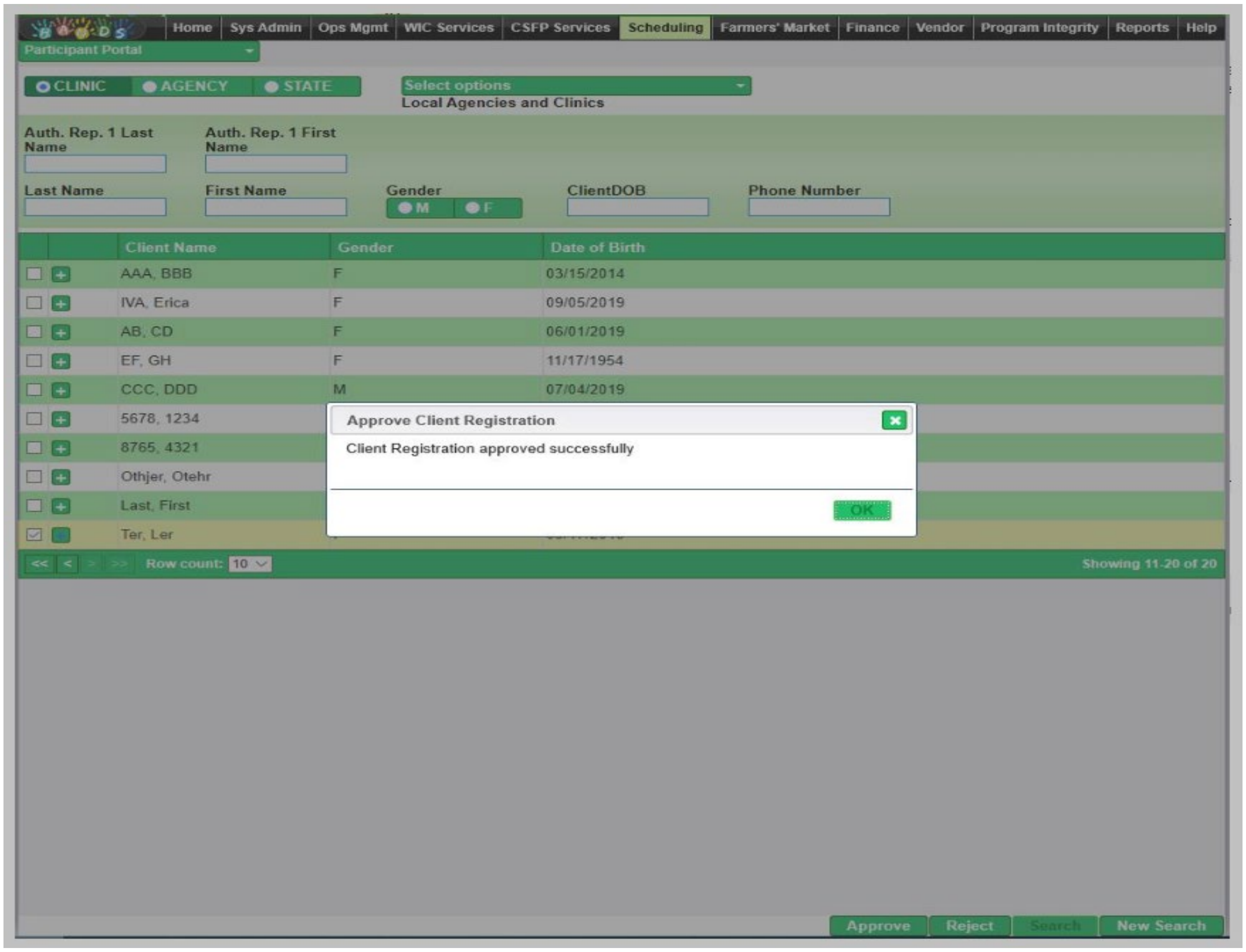


Figure 182:WIC Services – Participant Portal - Client registration approved

Buttons:

- **OK** – Press this button to close Pop-up with the message. System will navigate to Family Information Screen under WIC Services filled with details of the approved client.

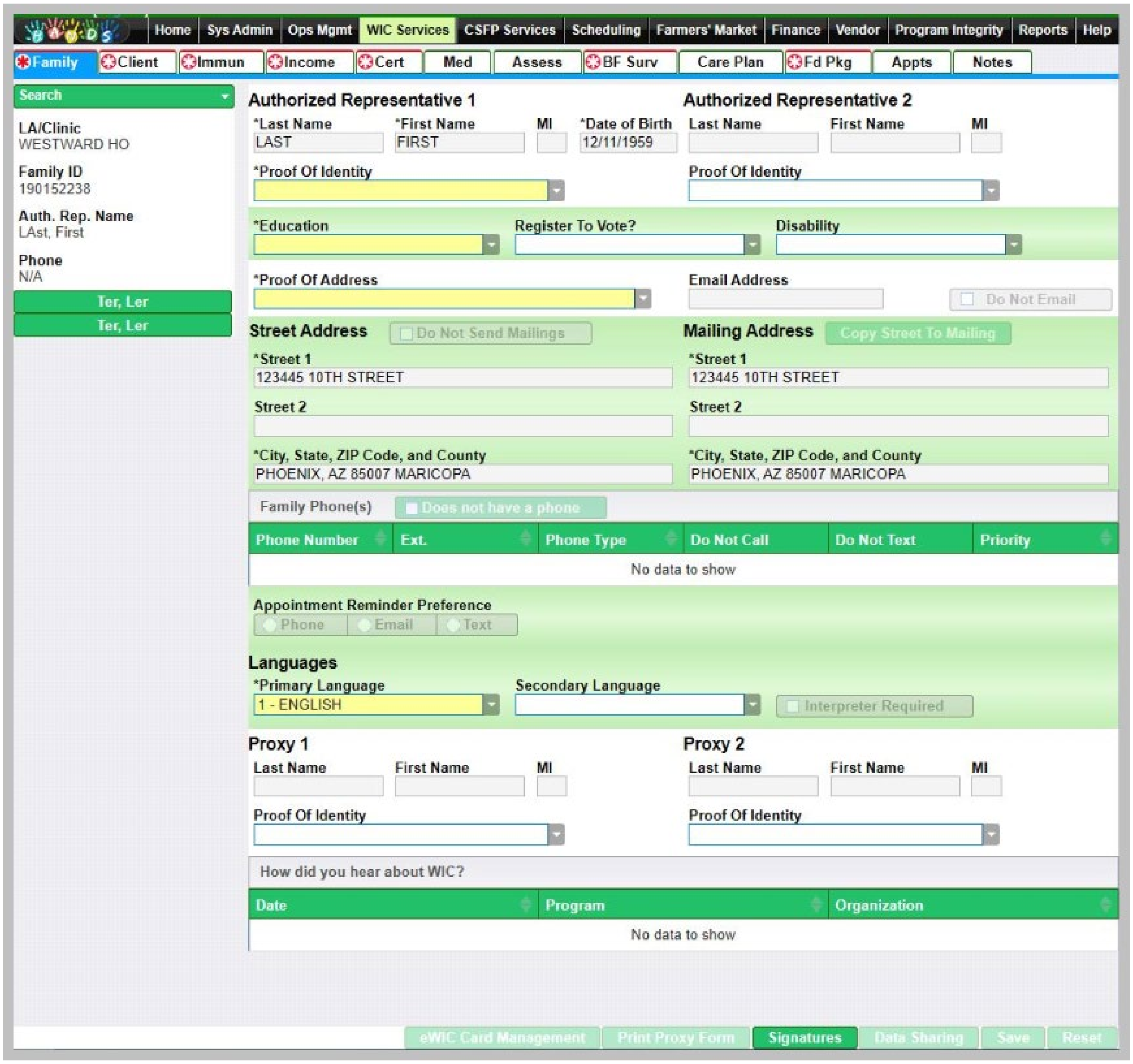


Figure 193: WIC Services – Family Information Screen filled with details of approved client.

15.4 Reject an online client

Narrative:

Purpose is to reject an applicant/client by selecting the client from search results.

Navigation Path: WIC Services | Participant Portal

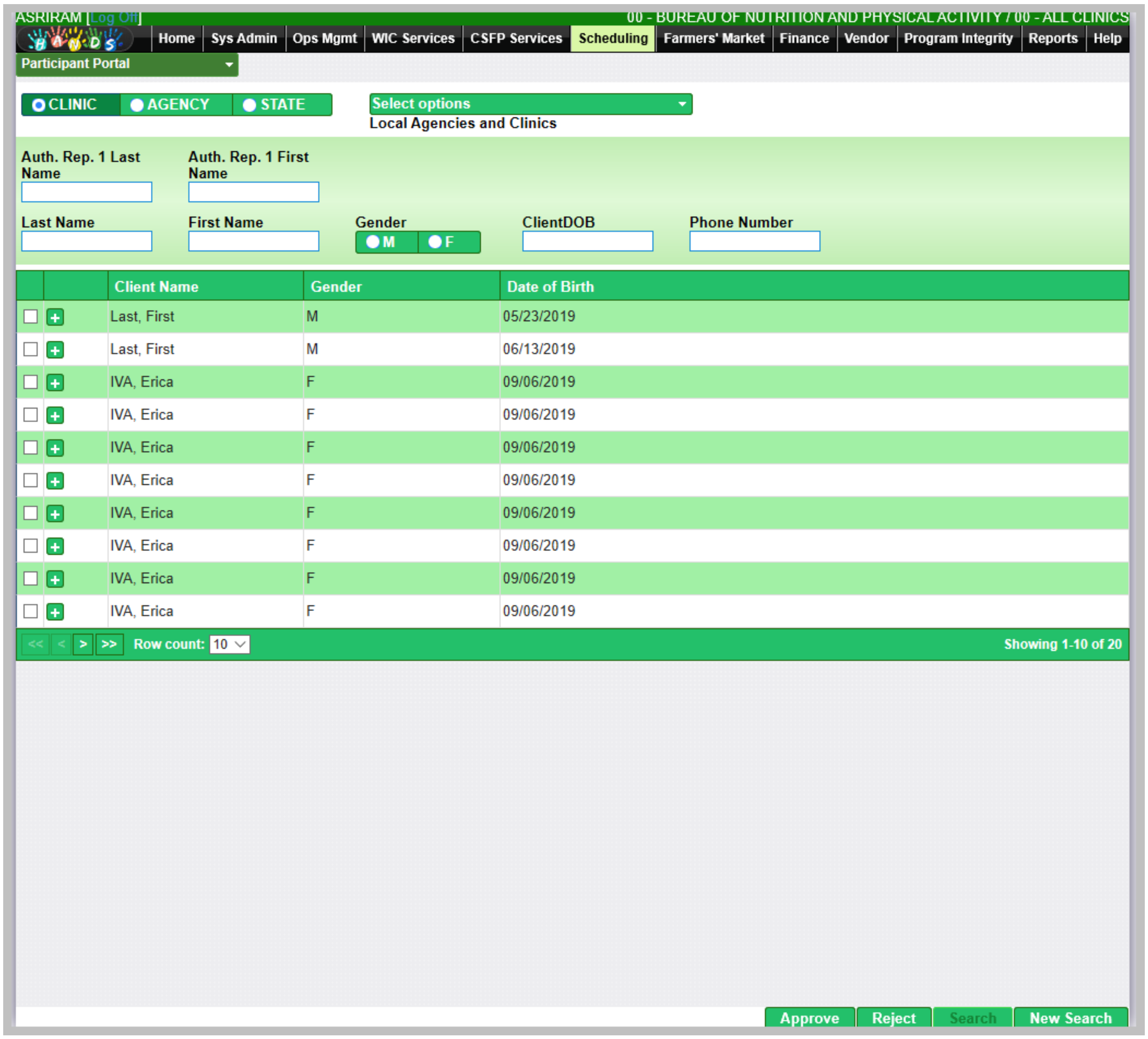


Figure 183:WIC Services – Participant Portal- Search Results with list of clients enrolled

Buttons:

- **Reject**– Press this button to reject a selected client from the search results grid.

Calculation(s): None

When **Reject button is clicked** by the user following checks are performed by the system:

1) System checks whether at least one client record has been selected for rejection. If not, an error message will be displayed saying "Please select a client to reject registration" with a OK button.

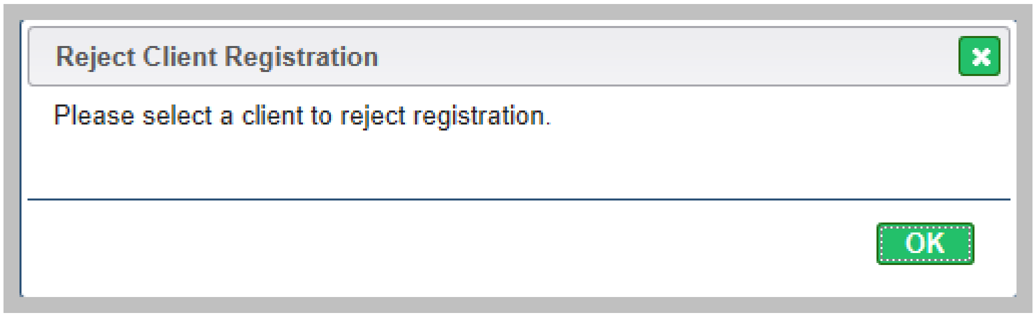


Figure 184:WIC Services – Participant Portal- Pop-up to prompt the user to select a record

2) **If a client record is selected from the search results and Reject Button is clicked,** system will display a message saying, "Client Registration rejected" with an OK button

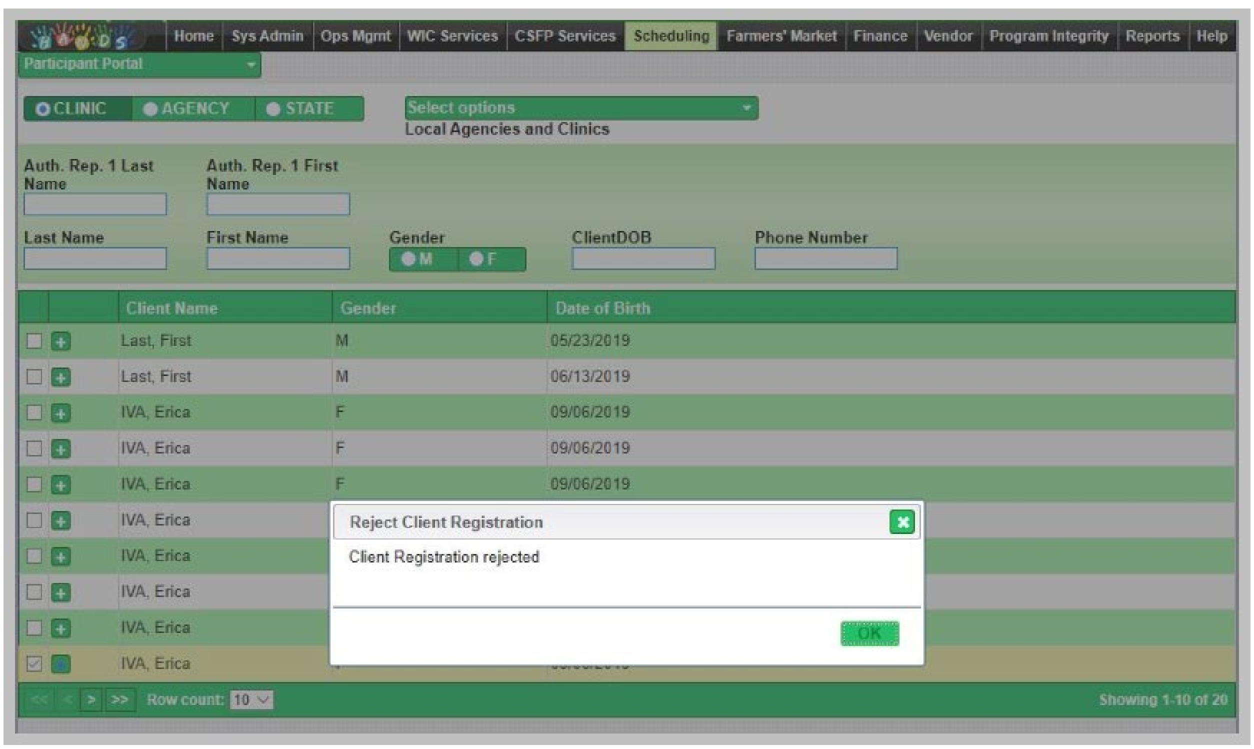


Figure 185:WIC Services – Participant Portal - Client registration rejected

Buttons:

- **OK –** Press this button to close Pop-up with the message. System clears search criteria and results and refreshes the Participant Portal page.

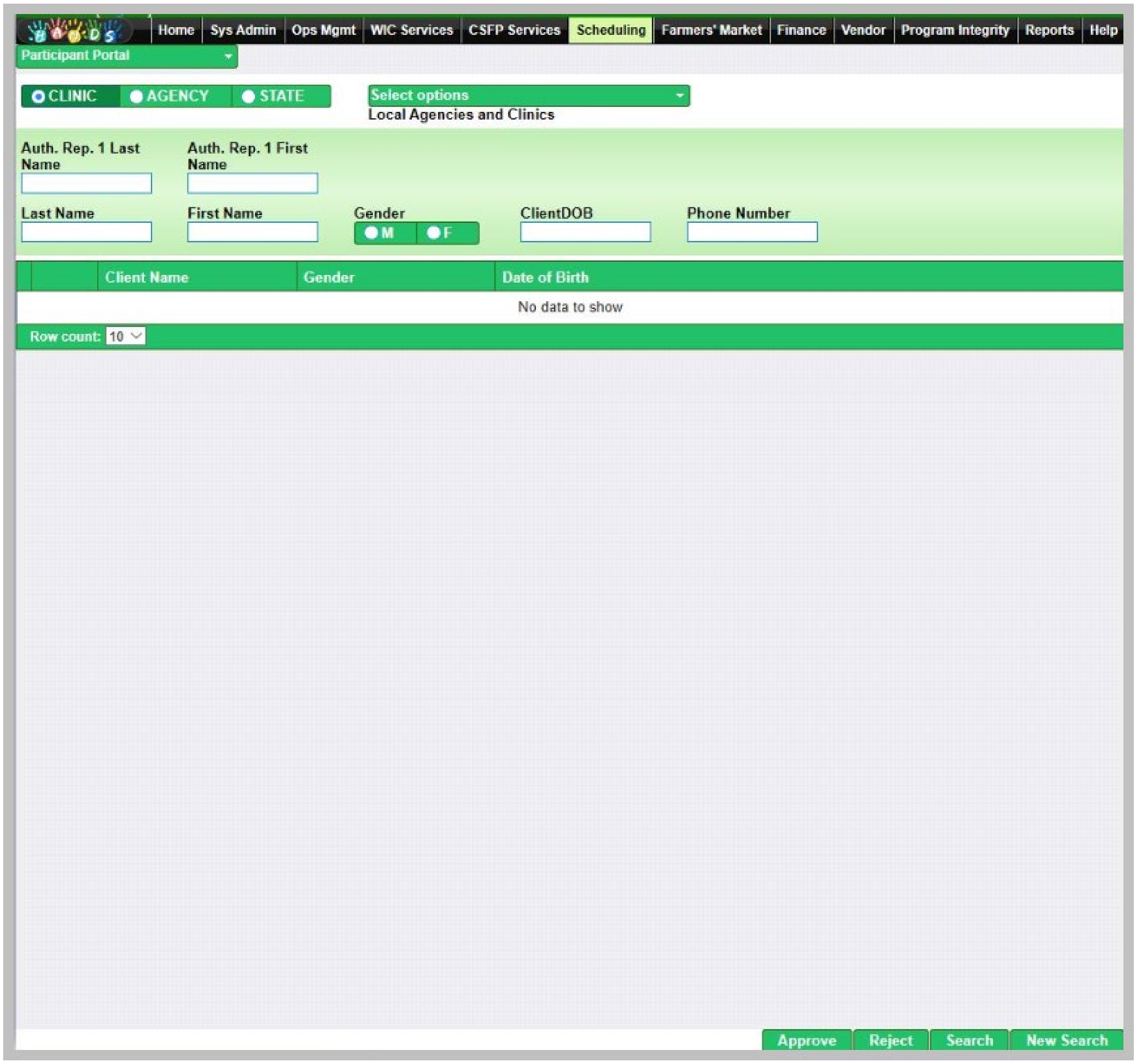


Figure 186:WIC Services – Participant Portal - After Client registration is rejected

16 BASE TABLES

Narrative:
The user will have the ability to add, edit, and delete records on all WIC Services base tables. The base tables within the WIC Services module are the building blocks for the entire module. They allow state agency staff to maintain options in drop down lists along with update changing restriction levels for background logic within the system.

Buttons:

- **Add –** Press this button to open up the add page so the user can add additional records to the base table.
- **(Edit Icon) –** Press this button to open up the edit page to allow for desired modifications to an existing record.
- **(Delete Icon) –** Press this button to bring up the delete record confirmation page.

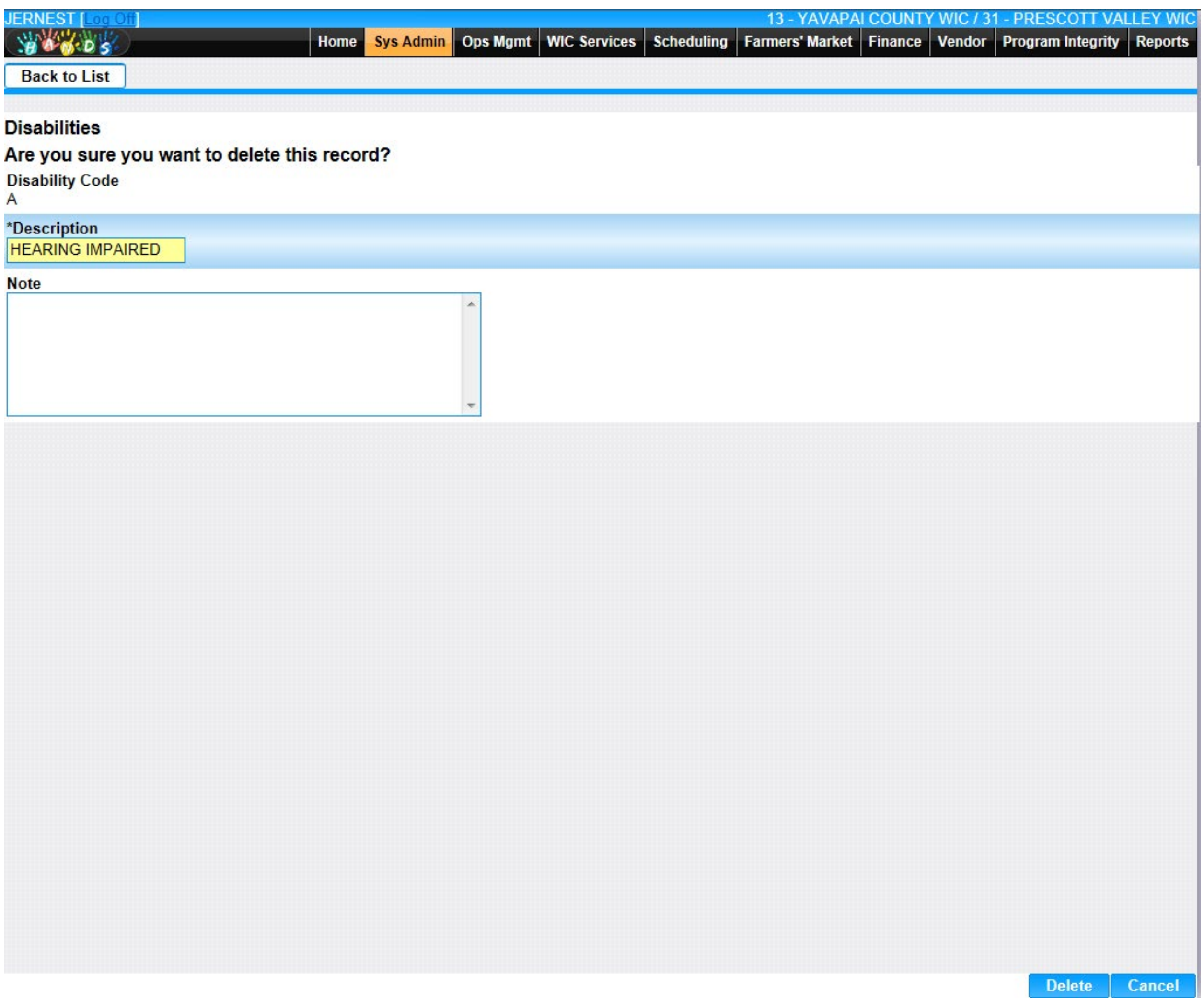


Figure 187:Delete Record Confirmation Page

Buttons:

- **Delete –** Press this button to permanently delete the record and return to the base table.
- **Cancel –** Press this button to cancel the record delete and return to the base table without any changes being done.

- **Save –** Press this button to save the record to the grid and return to the base table.
- **Reset –** Press this button to return the page to its original state without any changes being saved.
- **Back to List –** Press this button to return to the base table without any changes being done.

NOTE: Every base table grid will have at least 4 columns labeled Created By, Date Created, Modified By, and Date Modified. These 4 columns are automatically populated when adding new records or editing existing ones. These fields provide tracking information that helps determine who created/changed a record and when that creation or modification was done.

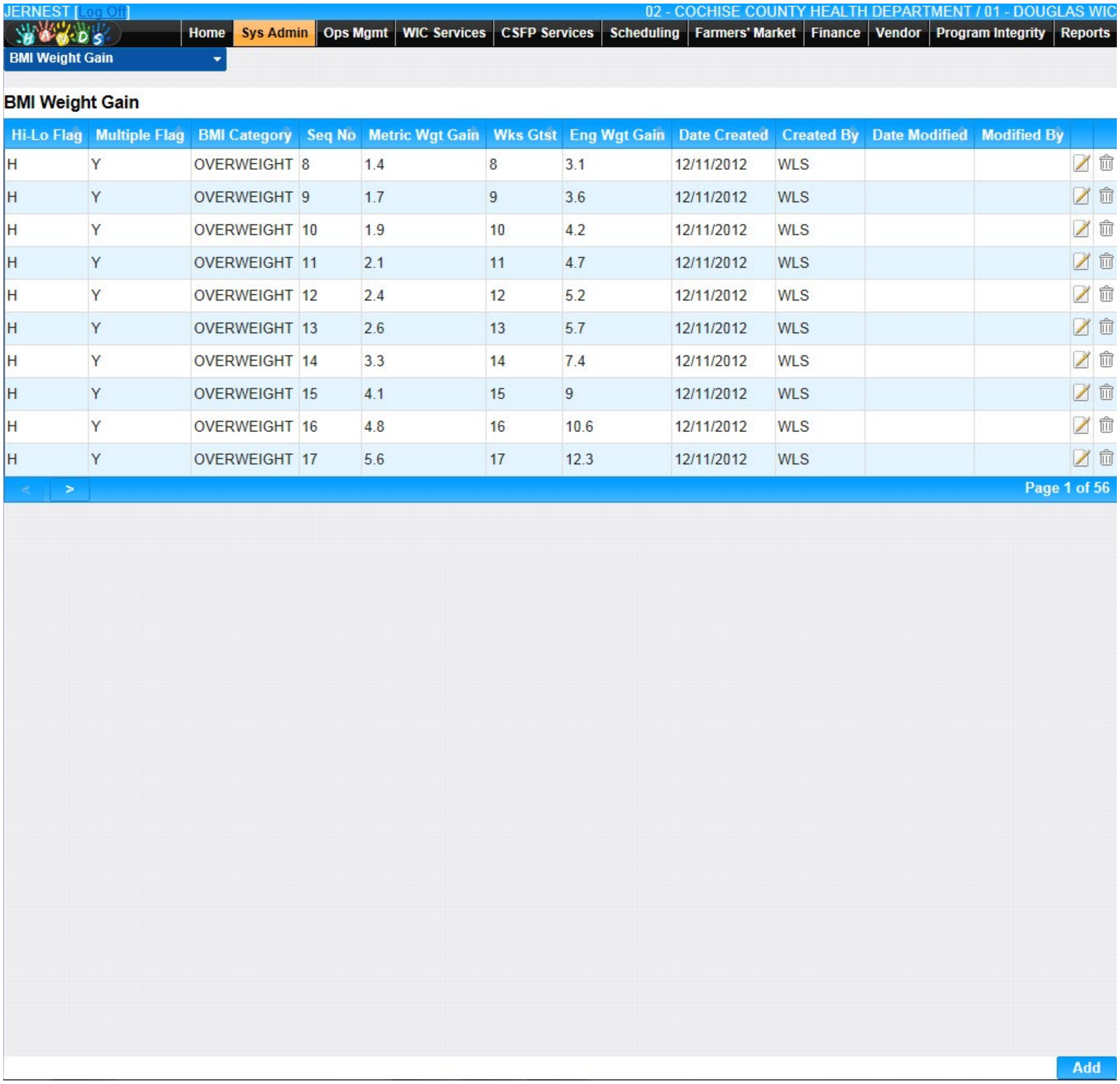
- *Created By – This field is populated with the logged in username of the user who created the original record.*
- *Date Created – This field is populated with the date and time of when the original record was created.*
- *Modified By – This field is populated with the logged in username of the user that made the last modification on the record.*
- *Date Modified – The field is populated with date and time of when the last modification was done on the record.*

NOTE: Every base table will also allow the user to add and edit a note field on all newly added and existing base table records. This note field is optional and allows up to 2000 alphanumeric and special characters.

16.1 BMI Weight Gain

Narrative:

The purpose of this page is to add and maintain BMI weight gain records for the system. The user can configure the BMI category and risk level associated with a given BMI weight gain during a woman's pregnancy. The system will select the appropriate BMI weight gain record for the Client based on the combination of the woman's calculated BMI, multiple flag, weight gain, and weeks gestation based on the woman's entered medical data.



Hi-Lo Flag	Multiple Flag	BMI Category	Seq No	Metric Wgt Gain	Wks Gtst	Eng Wgt Gain	Date Created	Created By	Date Modified	Modified By
H	Y	OVERWEIGHT	8	1.4	8	3.1	12/11/2012	WLS		
H	Y	OVERWEIGHT	9	1.7	9	3.6	12/11/2012	WLS		
H	Y	OVERWEIGHT	10	1.9	10	4.2	12/11/2012	WLS		
H	Y	OVERWEIGHT	11	2.1	11	4.7	12/11/2012	WLS		
H	Y	OVERWEIGHT	12	2.4	12	5.2	12/11/2012	WLS		
H	Y	OVERWEIGHT	13	2.6	13	5.7	12/11/2012	WLS		
H	Y	OVERWEIGHT	14	3.3	14	7.4	12/11/2012	WLS		
H	Y	OVERWEIGHT	15	4.1	15	9	12/11/2012	WLS		
H	Y	OVERWEIGHT	16	4.8	16	10.6	12/11/2012	WLS		
H	Y	OVERWEIGHT	17	5.6	17	12.3	12/11/2012	WLS		

Figure 188: BMI Weight Gain Base Table

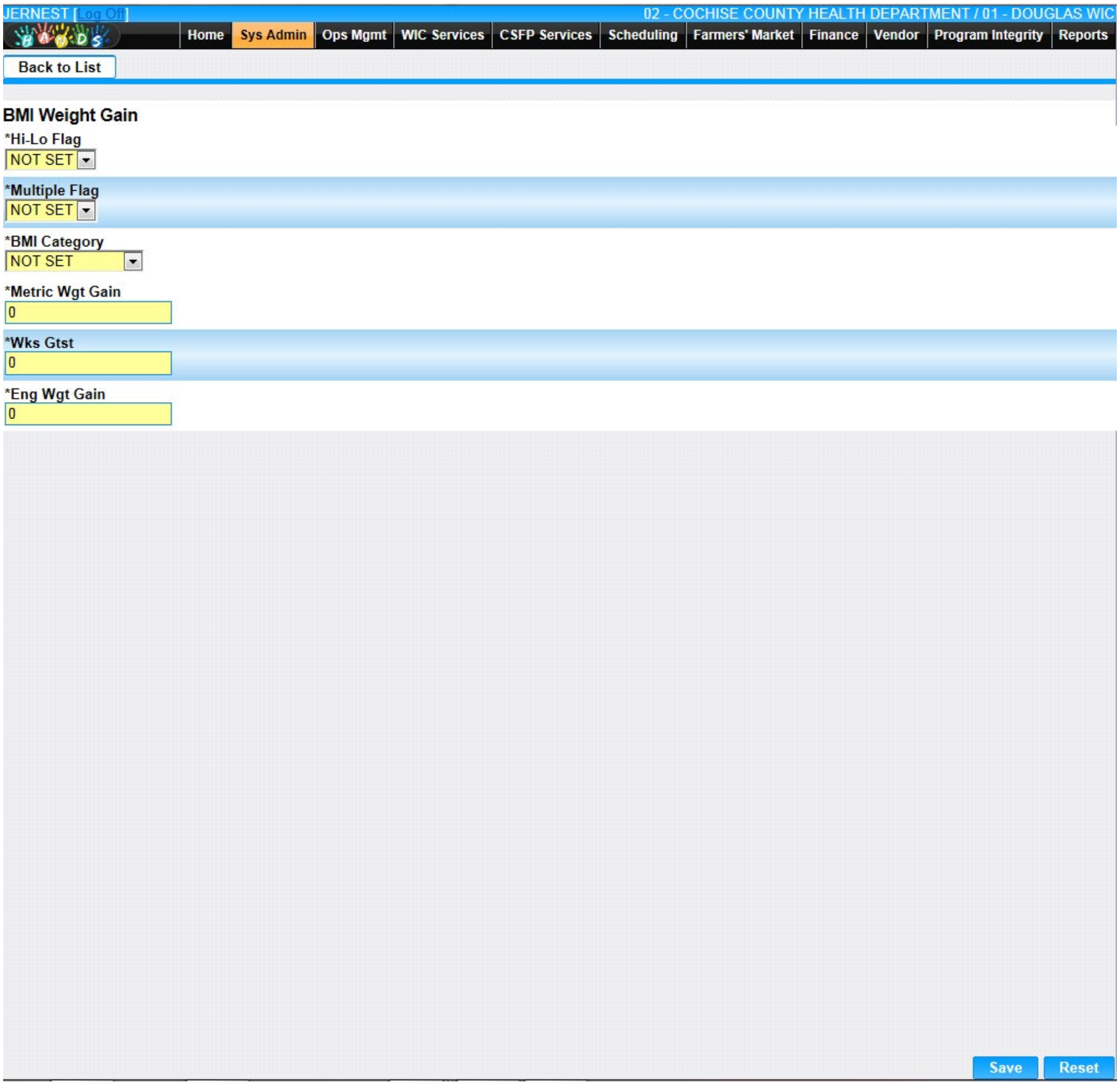


Figure 189: Add a BMI Weight Gain Record

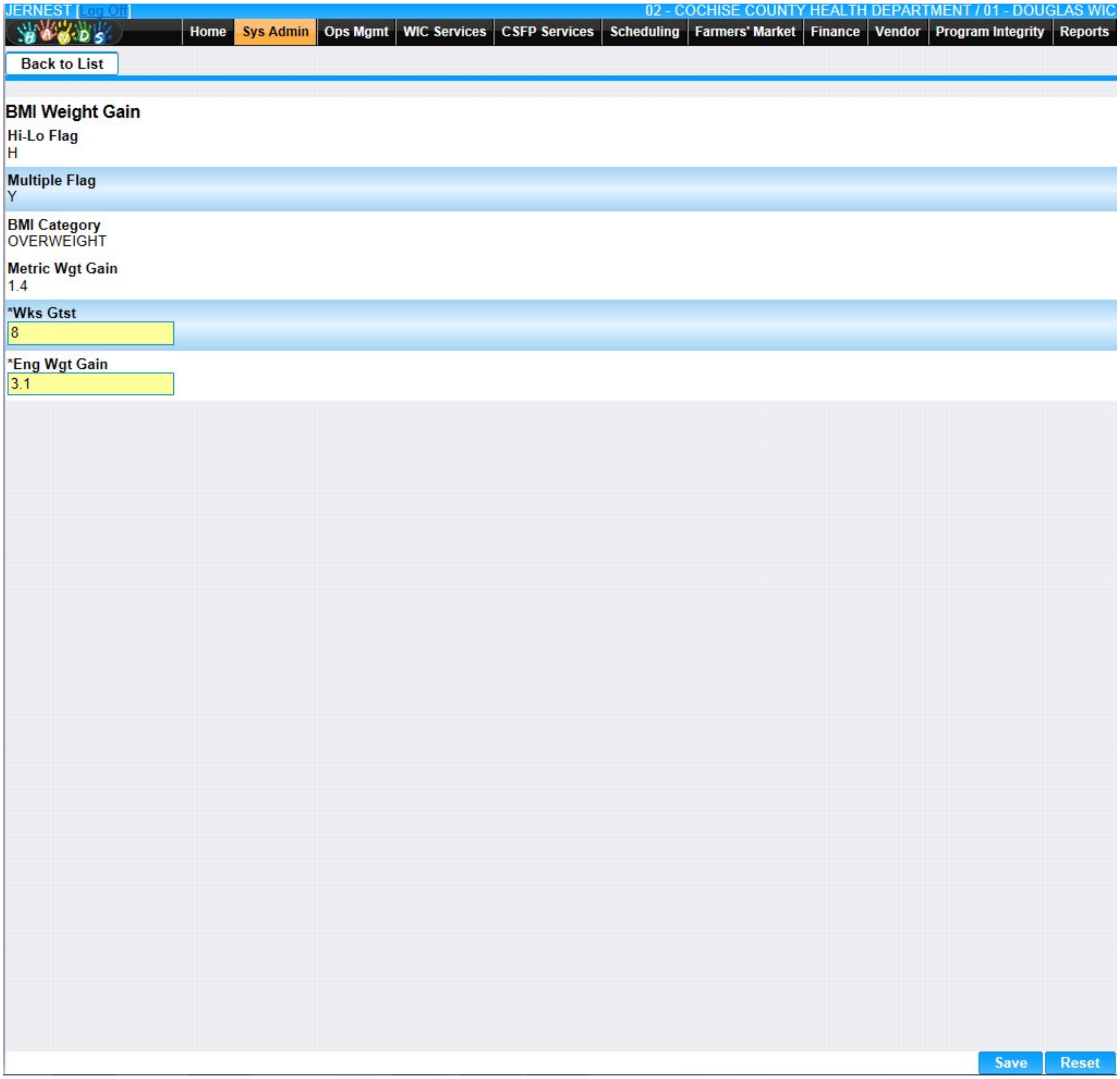


Figure 201: Edit a BMI Weight Gain Record

Fields:

- **Hi-Lo Flag –** A drop down list to determine if the BMI weight gain based on wgt gain, wks gest, and multiple flag is to be considered high or low risk. If the Yes option is selected then the BMI weight gain record is considered high risk. If the No option is selected then the BMI weight gain record is considered low risk. This field is mandatory and cannot be edited once the record has been saved.

- **Multiple Flag –** A drop down list to determine if the BMI weight gain record should be used for multiples or not. If the Yes option is selected then the BMI weight gain record will be used for Client's who have multiples. If the No option is selected then the BMI weight gain record will not be used for Client's who have multiples. This field is mandatory and cannot be edited once the record has been saved.

- **BMI Category –** The BMI category assigned to the BMI weight gain record. This field is mandatory, selected from a drop down list, and cannot be edited once the record has been saved.

Valid BMI Categories:
Underweight
Normal
Overweight
Obese

- **Metric Wgt Gain –** The Metric weight gain value for the record. This field is mandatory and accepts a maximum of two numeric characters followed by one decimal point. This field cannot be edited once the record has been saved.

- **Wks Gest –** The number of weeks gestation for the BMI weight gain record. This field is mandatory and accepts a maximum of two numeric characters.

- **Eng Wgt Gain –** The English weight gain value for the record. This field is mandatory and accepts a maximum of two numeric characters followed by one decimal point.

Calculations: None

Background Processes: None

16.2 Blood Work Types

Narrative:
The purpose of this page is to add and maintain blood work types for the system. The blood work types displayed in the base table are used to populate the blood work type field for records in the category blood works base table.

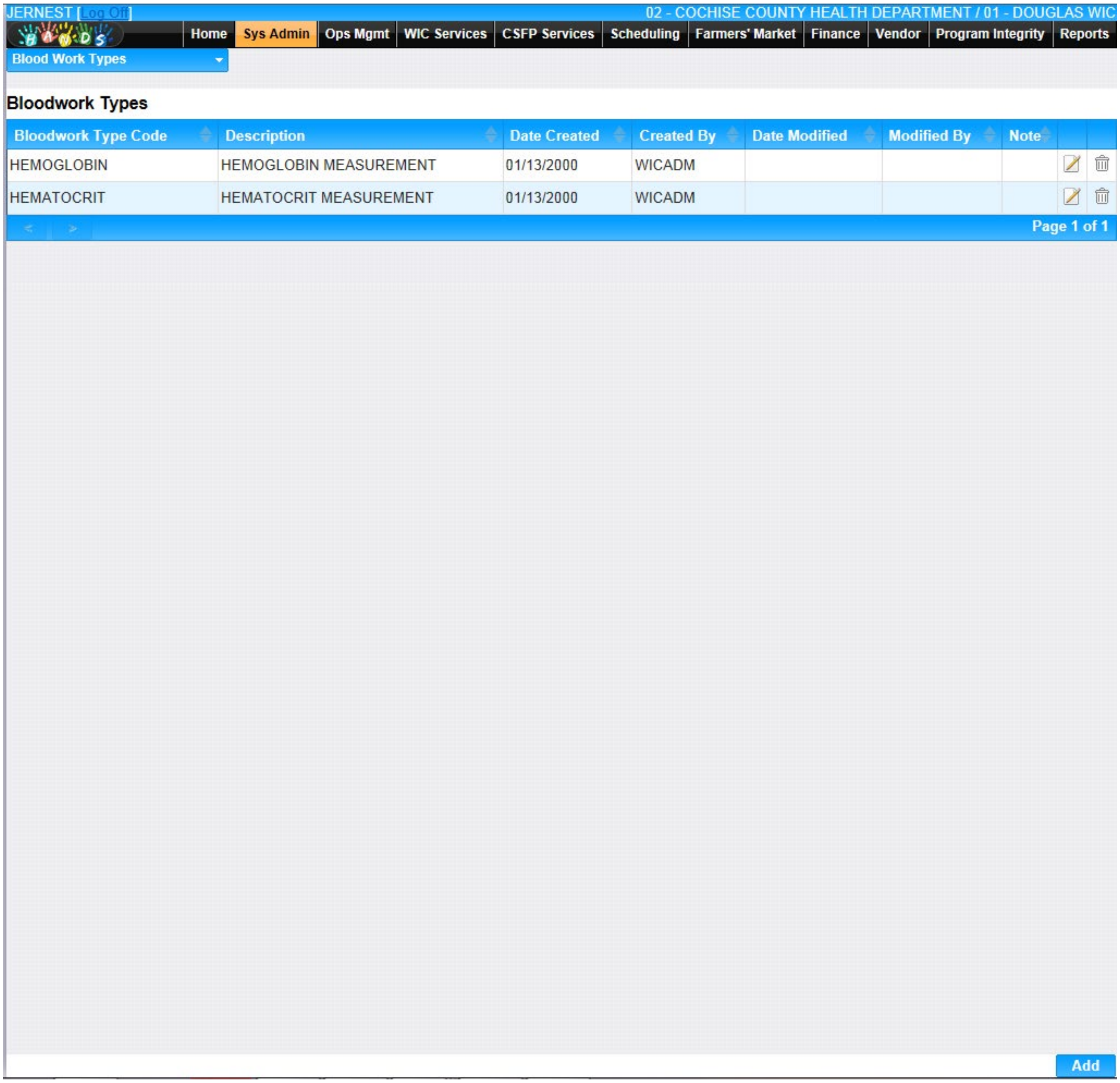


Figure 202: Blood Work Types Base Table

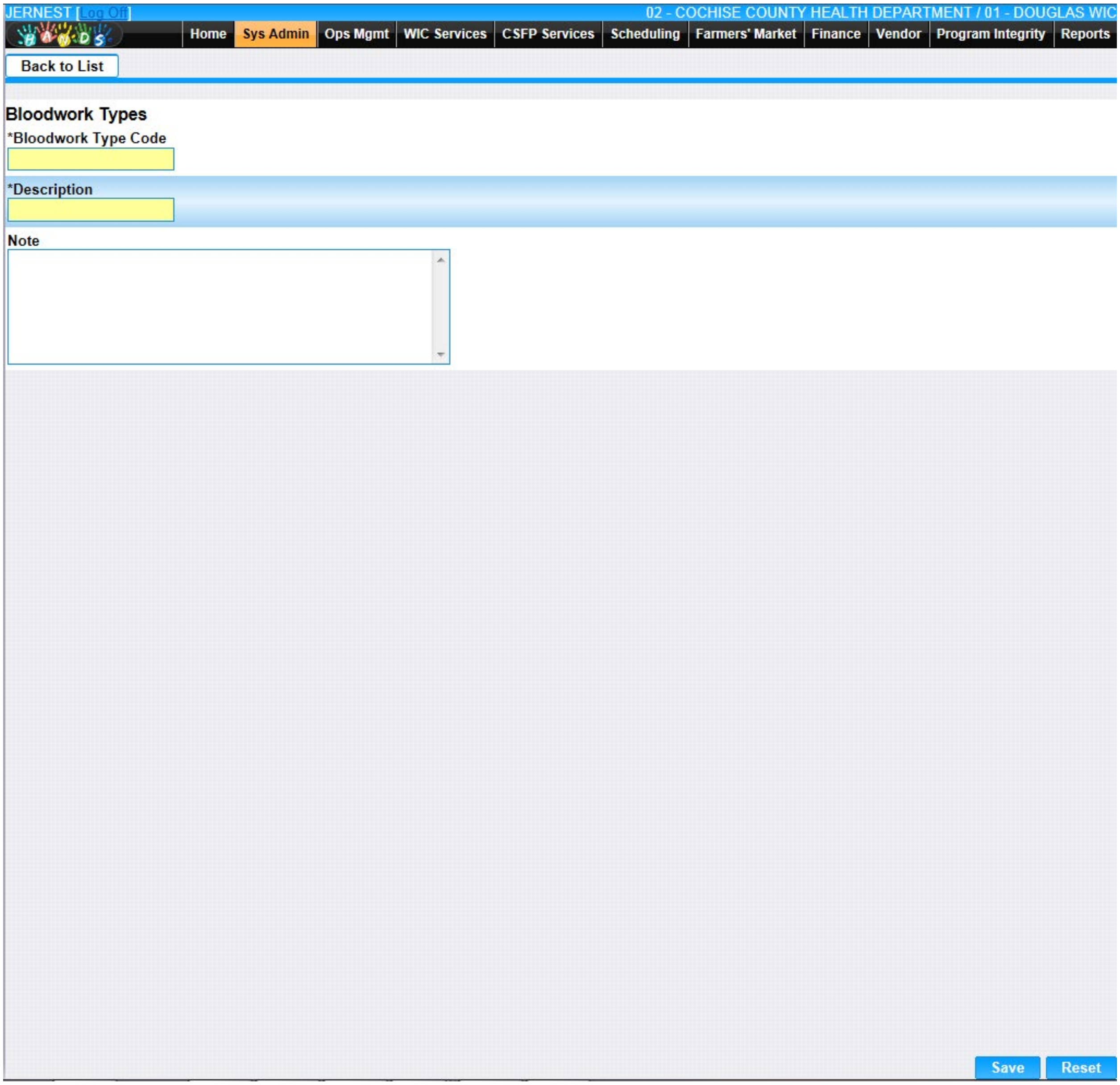


Figure 190: Add a Blood Work Type Record

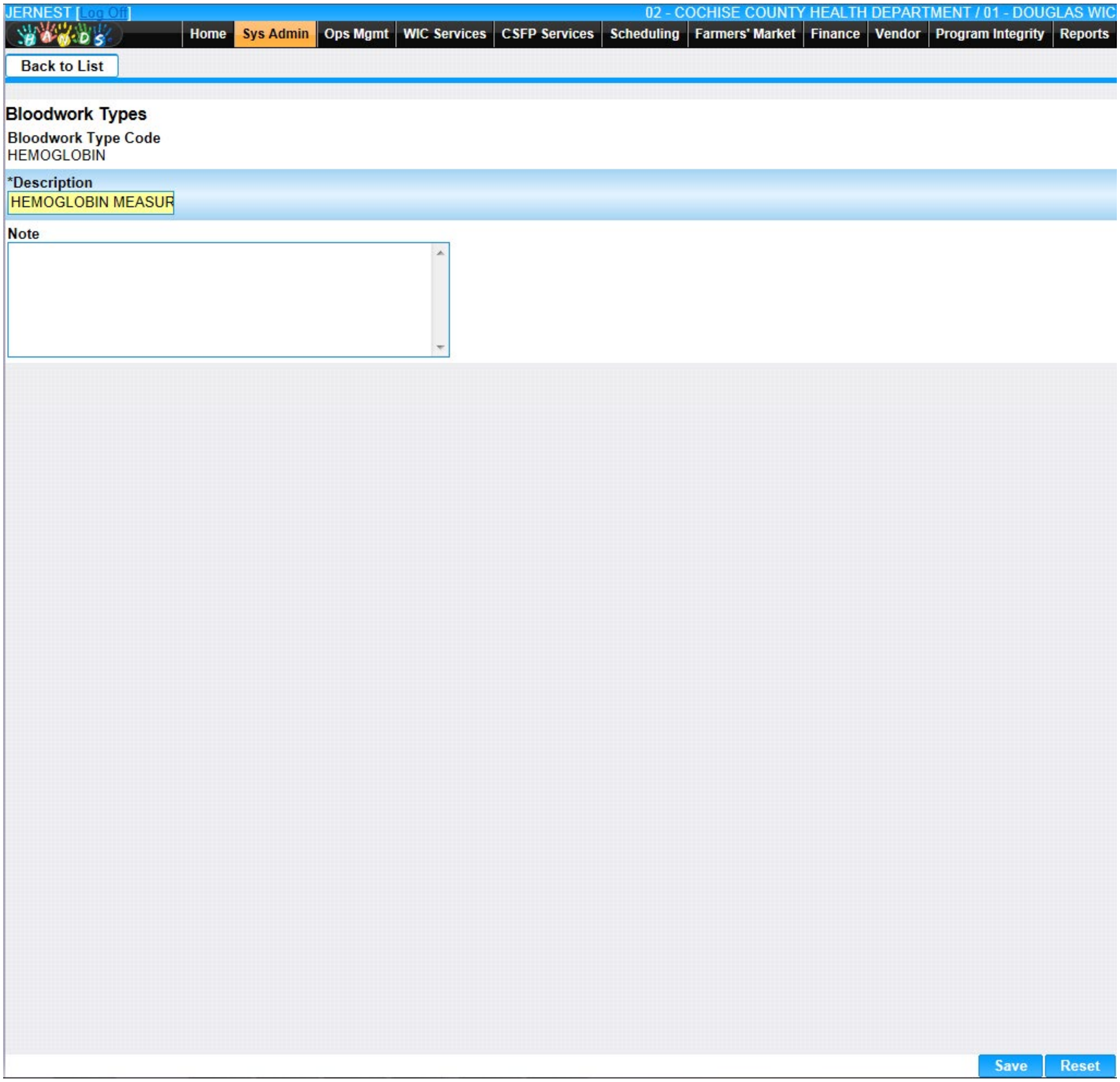


Figure 191: Edit a Blood Work Type Record

Fields:

- **Blood Work Type Code –** The unique user assigned code for the blood work type record. This field is mandatory and accepts a max of ten alphanumeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the blood work type. This field is mandatory and accepts up to 60 alphanumeric / special characters.

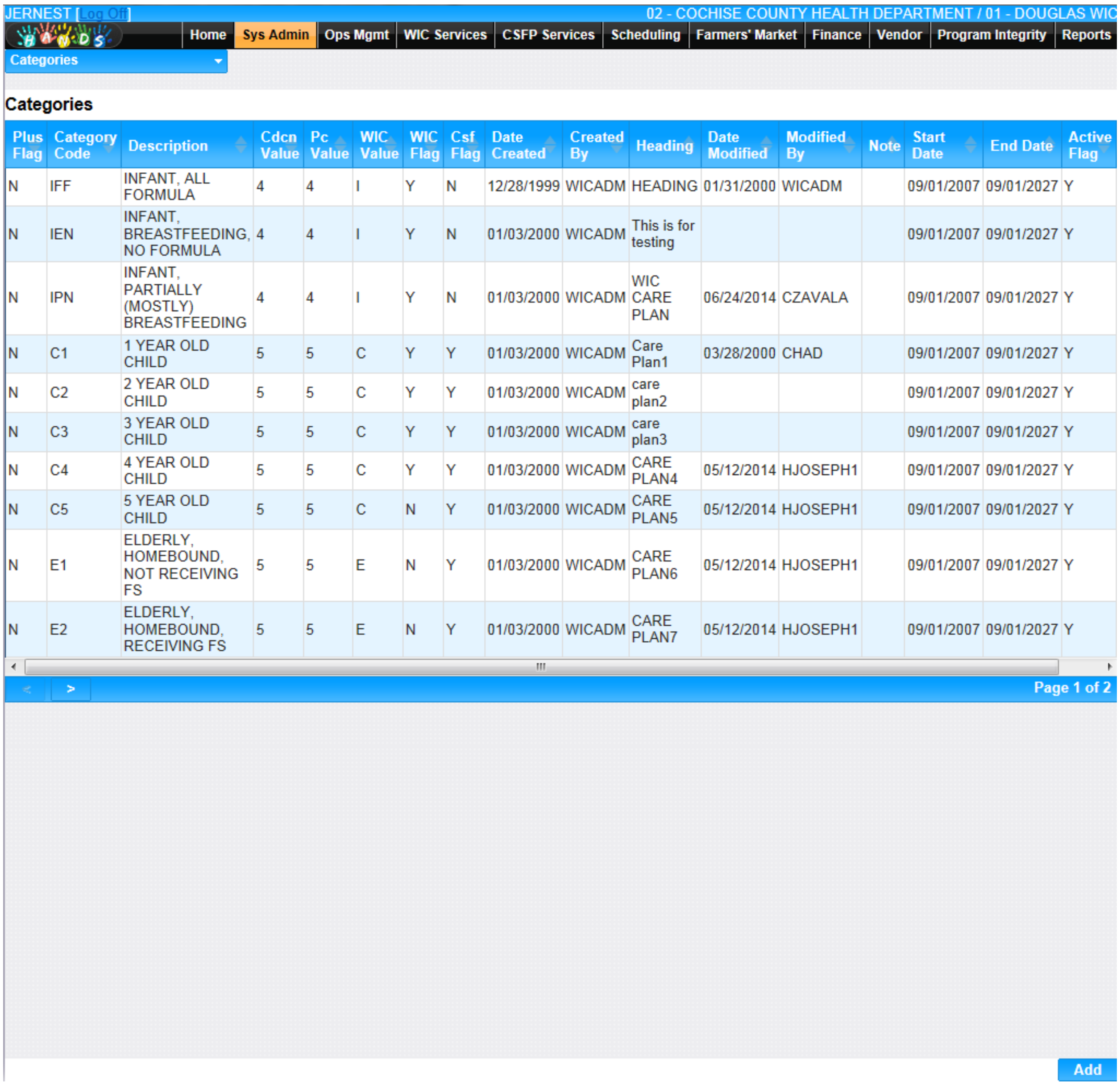
Calculations: None

Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple blood work type records so that they have the same blood work type code.

16.3 Categories

Narrative:
The purpose of this page is to add and maintain Client categories for the system. The categories displayed in the base table are used to populate the category drop down list on the Certification Action page.


JERNEST [Log Off] 02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC

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

Categories

Categories

Plus Flag	Category Code	Description	Cdcn Value	Pc Value	WIC Value	WIC Flag	Csf Flag	Date Created	Created By	Heading	Date Modified	Modified By	Note	Start Date	End Date	Active Flag
N	IFF	INFANT, ALL FORMULA	4	4	I	Y	N	12/28/1999	WICADM	HEADING	01/31/2000	WICADM		09/01/2007	09/01/2027	Y
N	IEN	INFANT, BREASTFEEDING, NO FORMULA	4	4	I	Y	N	01/03/2000	WICADM	This is for testing				09/01/2007	09/01/2027	Y
N	IPN	INFANT, PARTIALLY (MOSTLY) BREASTFEEDING	4	4	I	Y	N	01/03/2000	WICADM	WIC CARE PLAN	06/24/2014	CZAVALA		09/01/2007	09/01/2027	Y
N	C1	1 YEAR OLD CHILD	5	5	C	Y	Y	01/03/2000	WICADM	Care Plan1	03/28/2000	CHAD		09/01/2007	09/01/2027	Y
N	C2	2 YEAR OLD CHILD	5	5	C	Y	Y	01/03/2000	WICADM	care plan2				09/01/2007	09/01/2027	Y
N	C3	3 YEAR OLD CHILD	5	5	C	Y	Y	01/03/2000	WICADM	care plan3				09/01/2007	09/01/2027	Y
N	C4	4 YEAR OLD CHILD	5	5	C	Y	Y	01/03/2000	WICADM	CARE PLAN4	05/12/2014	HJOSEPH1		09/01/2007	09/01/2027	Y
N	C5	5 YEAR OLD CHILD	5	5	C	N	Y	01/03/2000	WICADM	CARE PLAN5	05/12/2014	HJOSEPH1		09/01/2007	09/01/2027	Y
N	E1	ELDERLY, HOMEBOUND, NOT RECEIVING FS	5	5	E	N	Y	01/03/2000	WICADM	CARE PLAN6	05/12/2014	HJOSEPH1		09/01/2007	09/01/2027	Y
N	E2	ELDERLY, HOMEBOUND, RECEIVING FS	5	5	E	N	Y	01/03/2000	WICADM	CARE PLAN7	05/12/2014	HJOSEPH1		09/01/2007	09/01/2027	Y

< > Page 1 of 2

Add

Figure 192: Categories Base Table

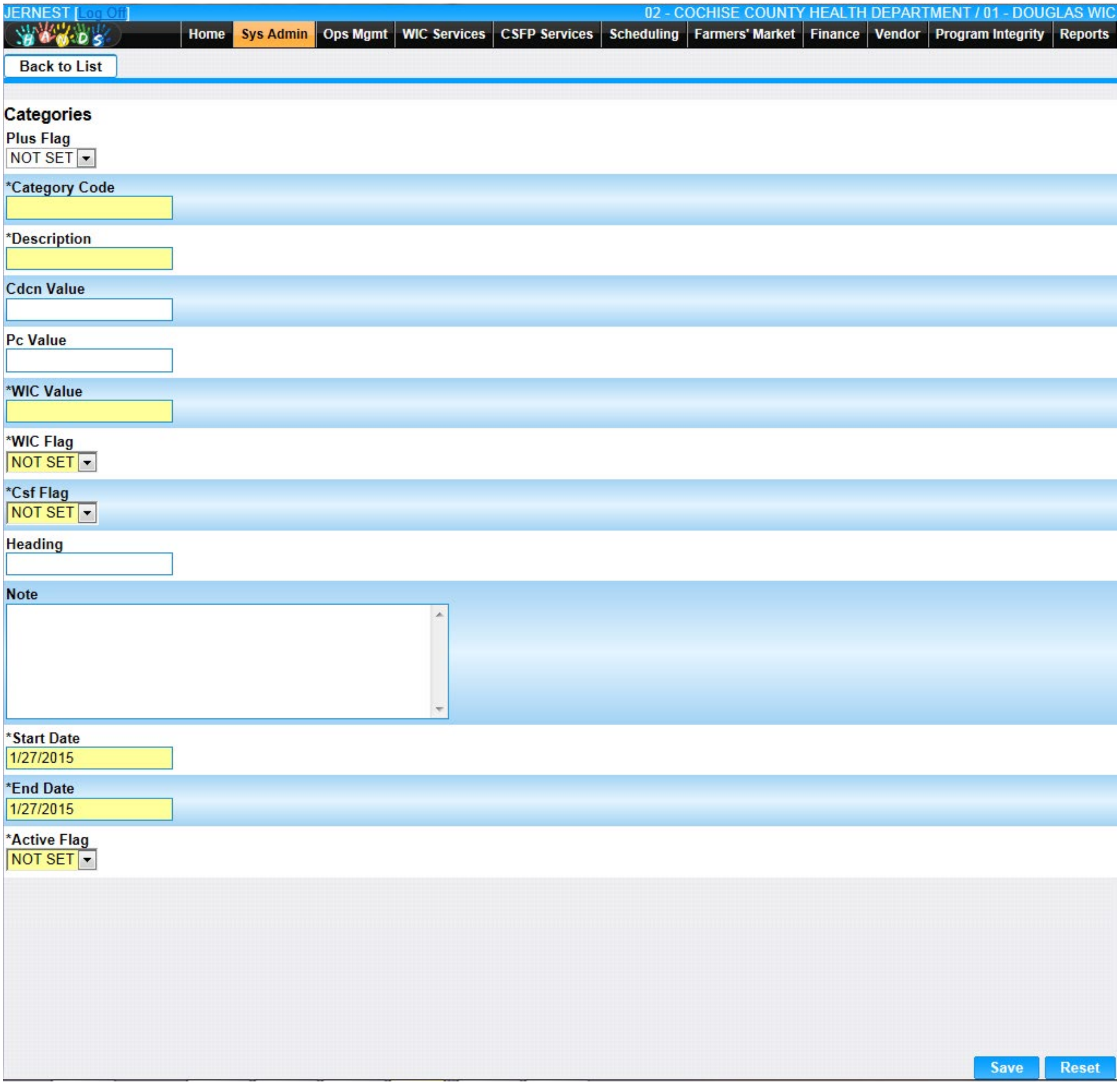


Figure 193: Add a Category Record

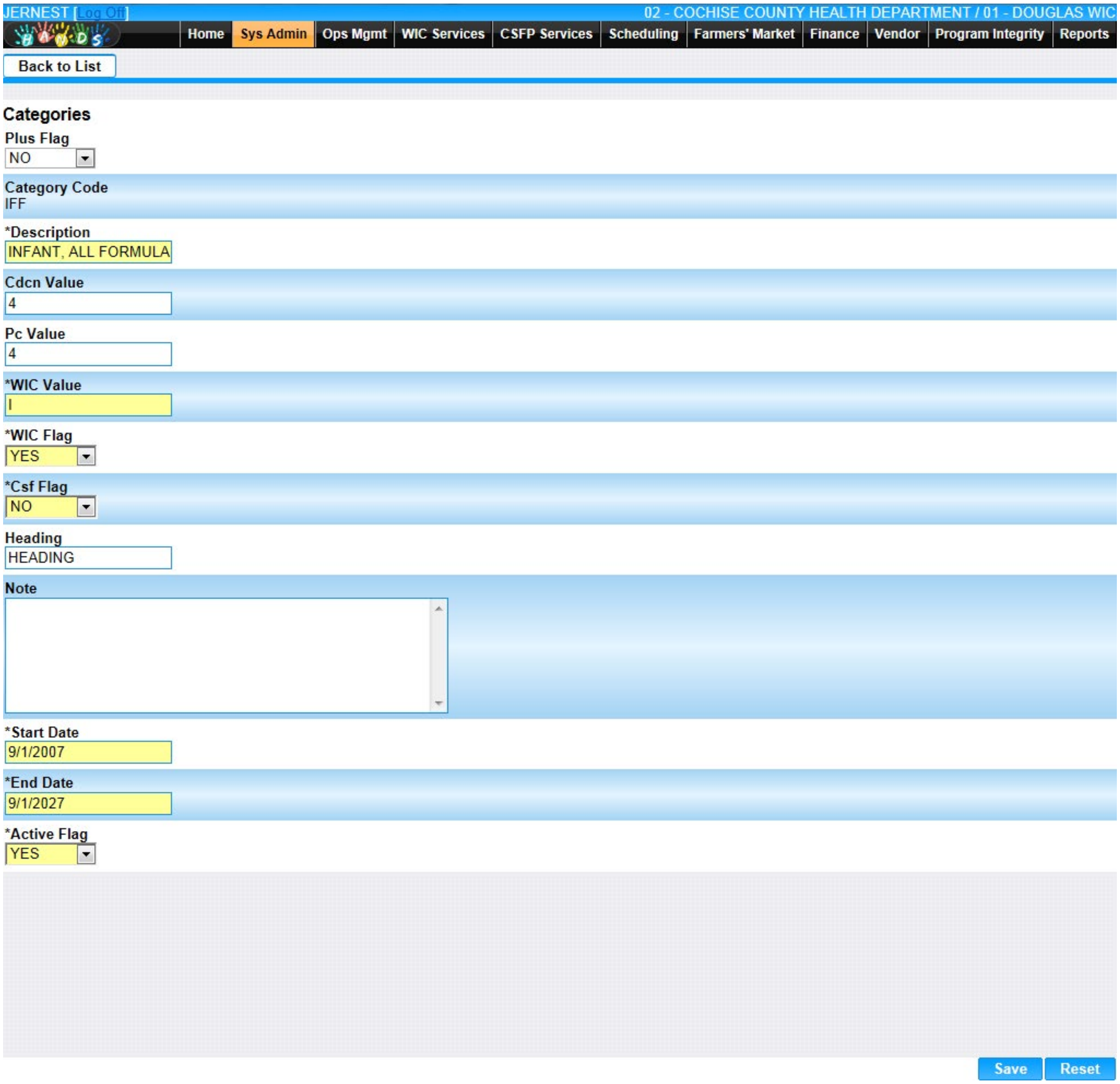


Figure 194: Edit a Category Record

Fields:

- **Plus Flag –** A drop down list used to determine if the category is a plus category. This field is optional. If the Yes option is selected, then the category is considered a plus category. If the No option is selected, then the category is considered not to be a plus category.
- **Category Code –** The unique user assigned code for the category. This field is mandatory and accepts a max of four alphanumeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the category. This field is mandatory and accepts up to 40 alphanumeric / special characters.
- **Cdcn Value –** The CDC – Pnss value for the category. This field is optional and accepts a maximum of one numeric character.

- **Pc Value –** The Pc96 value for the category. This field is optional and accepts a maximum of one numeric character.
- **WIC Value –** A value to be indicate what group the category is in. This field is mandatory and accepts a maximum of one alphanumeric characters.
  NOTE: Valid values are W for Woman, I for Infant, C for Children, E for Elderly.
- **WIC Flag –** A drop down list to determine if the category record is used for WIC Clients. If the Yes option is selected, then the category can be selected and assigned to WIC Clients. If the No option is selected, then the category cannot be selected and assigned to WIC Clients.
- **Csf Flag –** A drop down list to determine if the category record is used for CSFP Clients. If the Yes option is selected, then the category can be selected and assigned to CSFP Clients. If the No option is selected, then the category cannot be selected and assigned to CSFP Clients.
- **Heading –** The category specific care plan message heading. This field is optional and accepts a maximum of 60 alphanumeric characters.
- **Start Date –** The starting date of the category record. This field is mandatory.
- **End Date –** The ending date of the category record. This field is mandatory and must be greater than the date entered in the start date field.
- **Active Flag –** A drop down list to determine if the category record is active or not. If the Yes option is selected, then the category is active and can be assigned to a Client. If the No option is selected, then the category is not active and cannot be assigned to a Client. This field is mandatory.

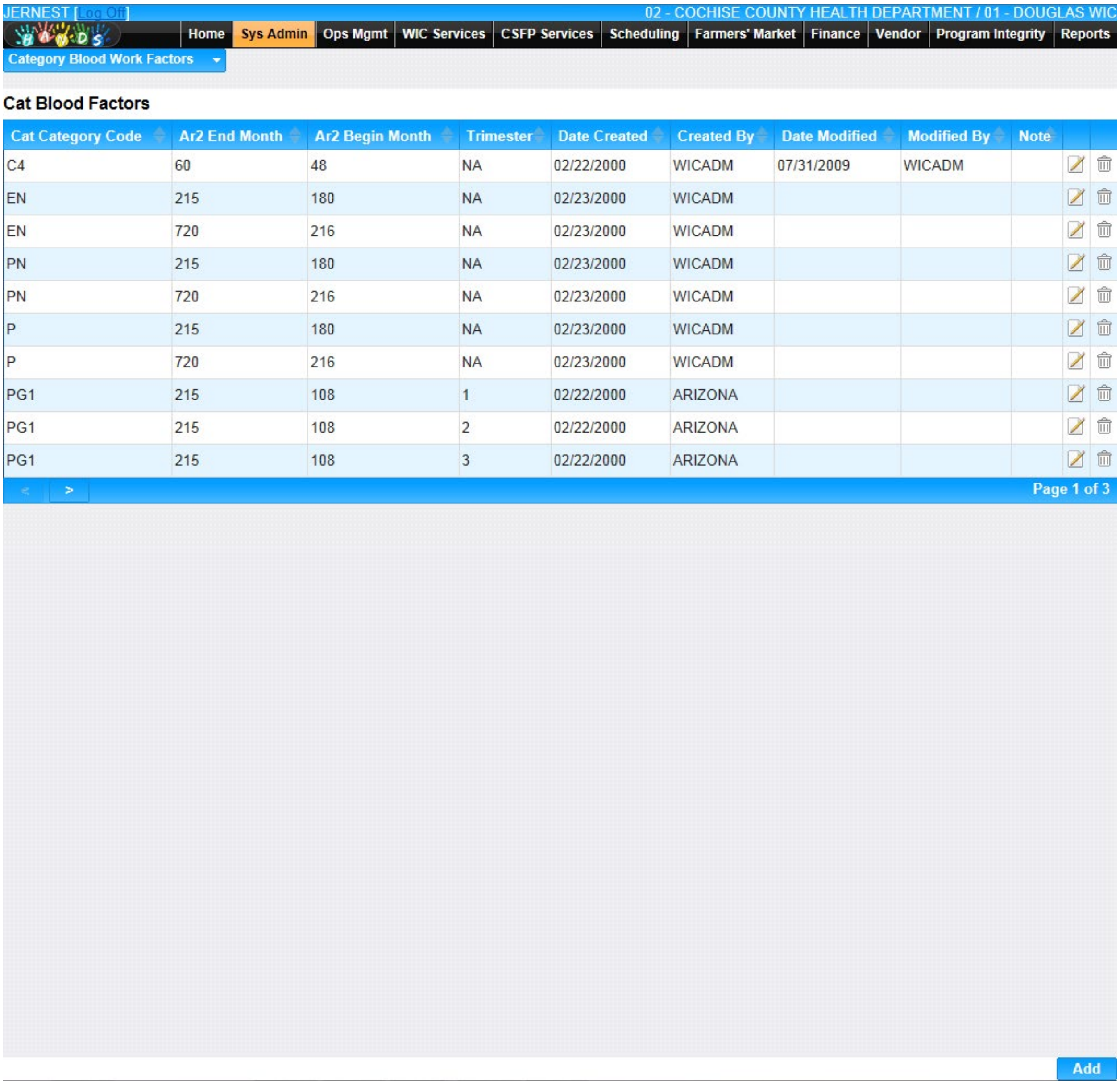
Calculations: None

Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple category records so that they have the same category code.

16.4 Category Blood Work Factors

Narrative:
The purpose of this page is to add and maintain category blood work factors for the system. The page allows for the configuration of the valid age ranges associated with setup of category blood work records in the category blood work base table. The category blood work factors will validate the Age Begin Month and Age End Month settings against the Ar2 Begin and Ar2 End month age ranges configured via this category blood work factors base table.



Cat Category Code	Ar2 End Month	Ar2 Begin Month	Trimester	Date Created	Created By	Date Modified	Modified By	Note
C4	60	48	NA	02/22/2000	WICADM	07/31/2009	WICADM	
EN	215	180	NA	02/23/2000	WICADM			
EN	720	216	NA	02/23/2000	WICADM			
PN	215	180	NA	02/23/2000	WICADM			
PN	720	216	NA	02/23/2000	WICADM			
P	215	180	NA	02/23/2000	WICADM			
P	720	216	NA	02/23/2000	WICADM			
PG1	215	108	1	02/22/2000	ARIZONA			
PG1	215	108	2	02/22/2000	ARIZONA			
PG1	215	108	3	02/22/2000	ARIZONA			

Figure 195: Category Blood Works Factors Base Table

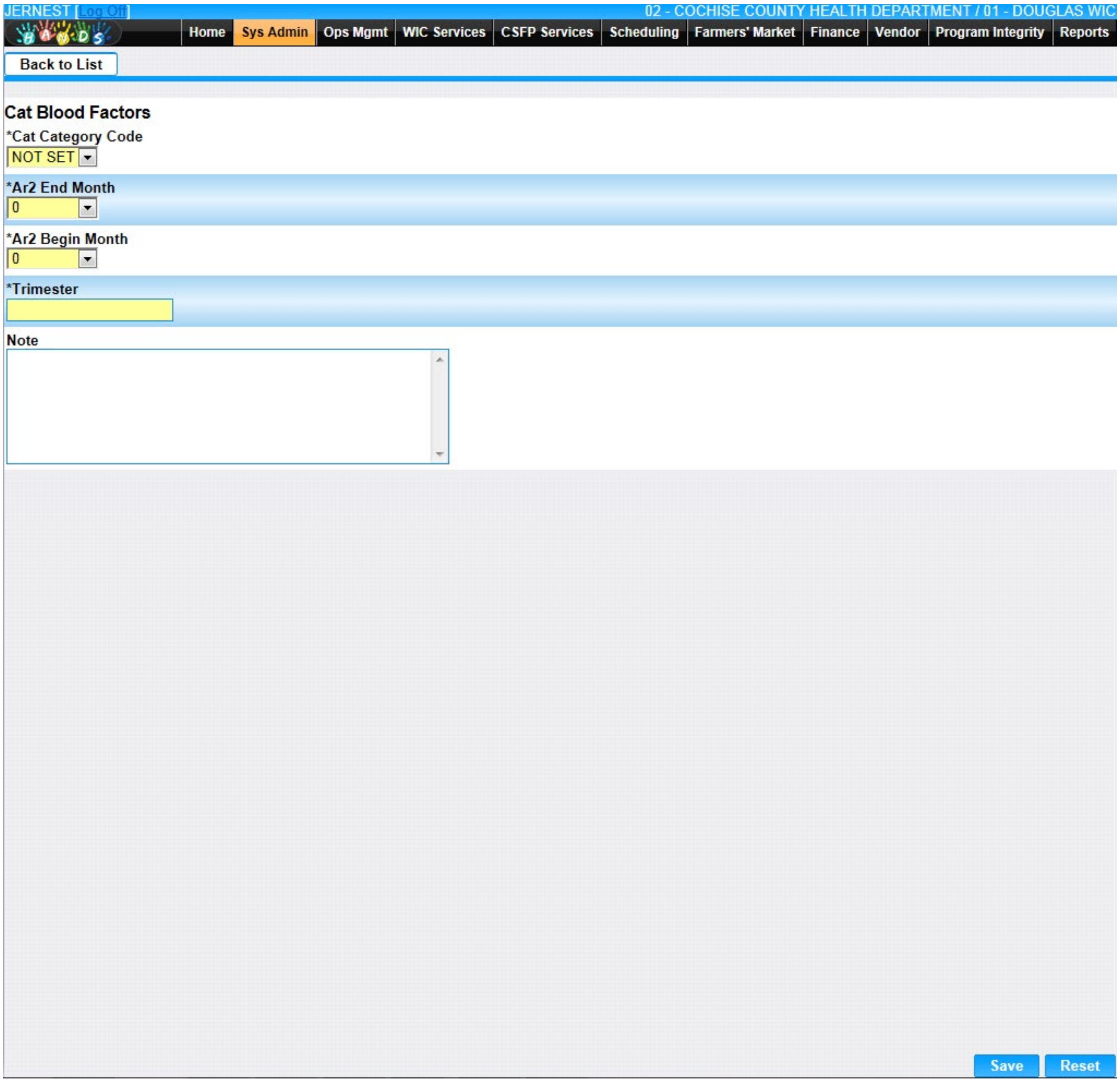


Figure 196: Add a Category Blood Work Factors Record

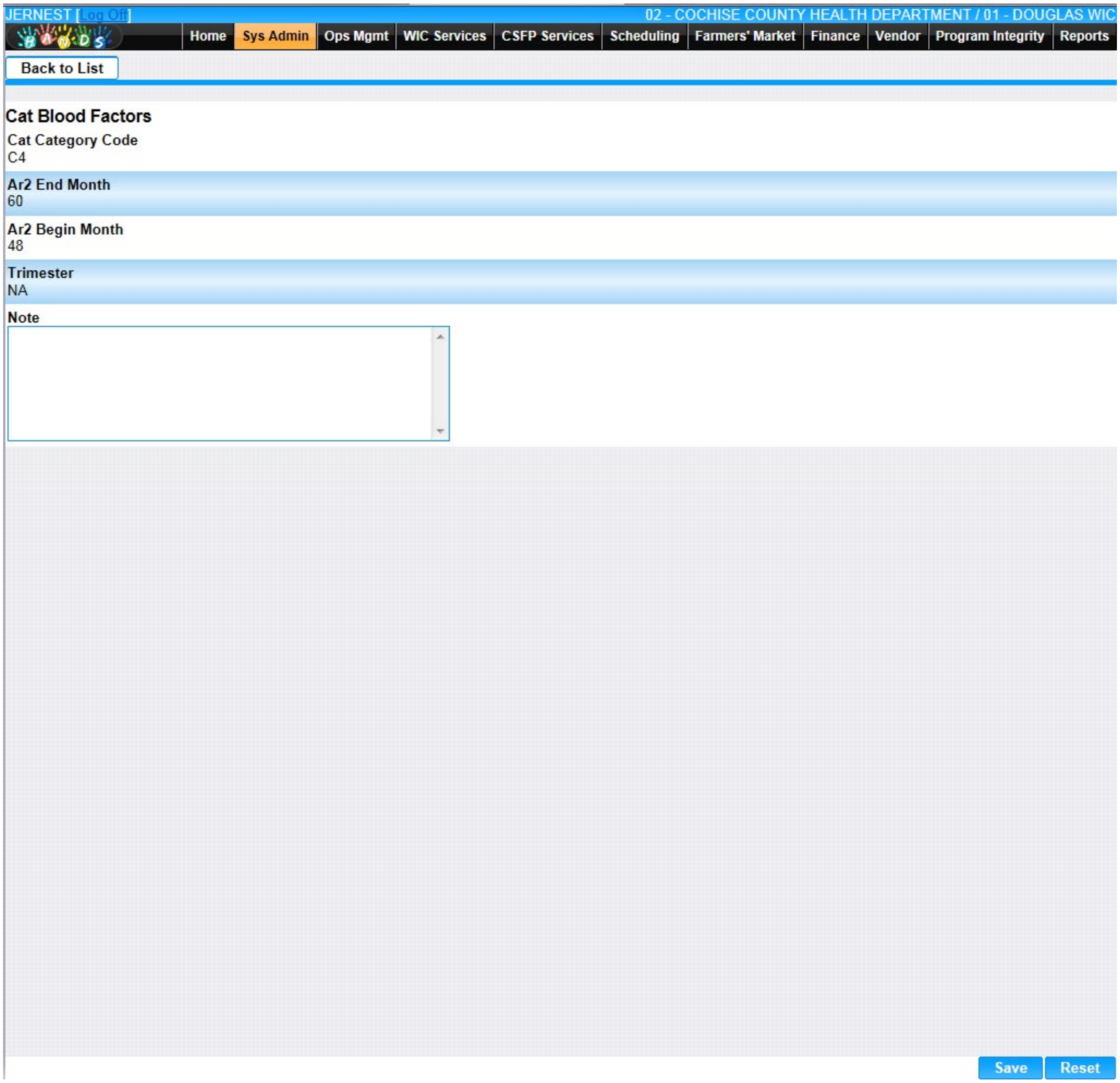


Figure 197: Edit a Category Blood Work Factors Record

Fields:

- **Cat Category Code –** A drop down list to determine the category of the blood work factors record. This field is mandatory and selected from a drop down list. The drop down list is populated with data populated in the categories base table.

- **Ar2 End Month –** Age in Months the client's current age must be less than or equal to in order to qualify for inclusion as a member of the age range defined by the record.

- **Ar2 Begin Month –** Age in Months the client's current age must be greater than or equal to in order to qualify for inclusion as a member of the age range defined by the record.

- **Trimester –** The current trimester of a pregnant woman.

Trimester Age	
1	0-13 weeks
2	14-26 weeks
3	27-40+ weeks

Calculations: None

Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple category blood work factor records so that they have the same category, ar2 end month, ar2 begin month, and trimester.

16.5 Category Blood Works

Narrative:

The purpose of this page is to add and maintain category blood works for the system. The records are used on the medical screen to help determine WIC codes for categories by blood work type, category, and if Client is a smoker or nonsmoker. User is able to search for category blood works records by category, trimester, age, blood work values and elevation.

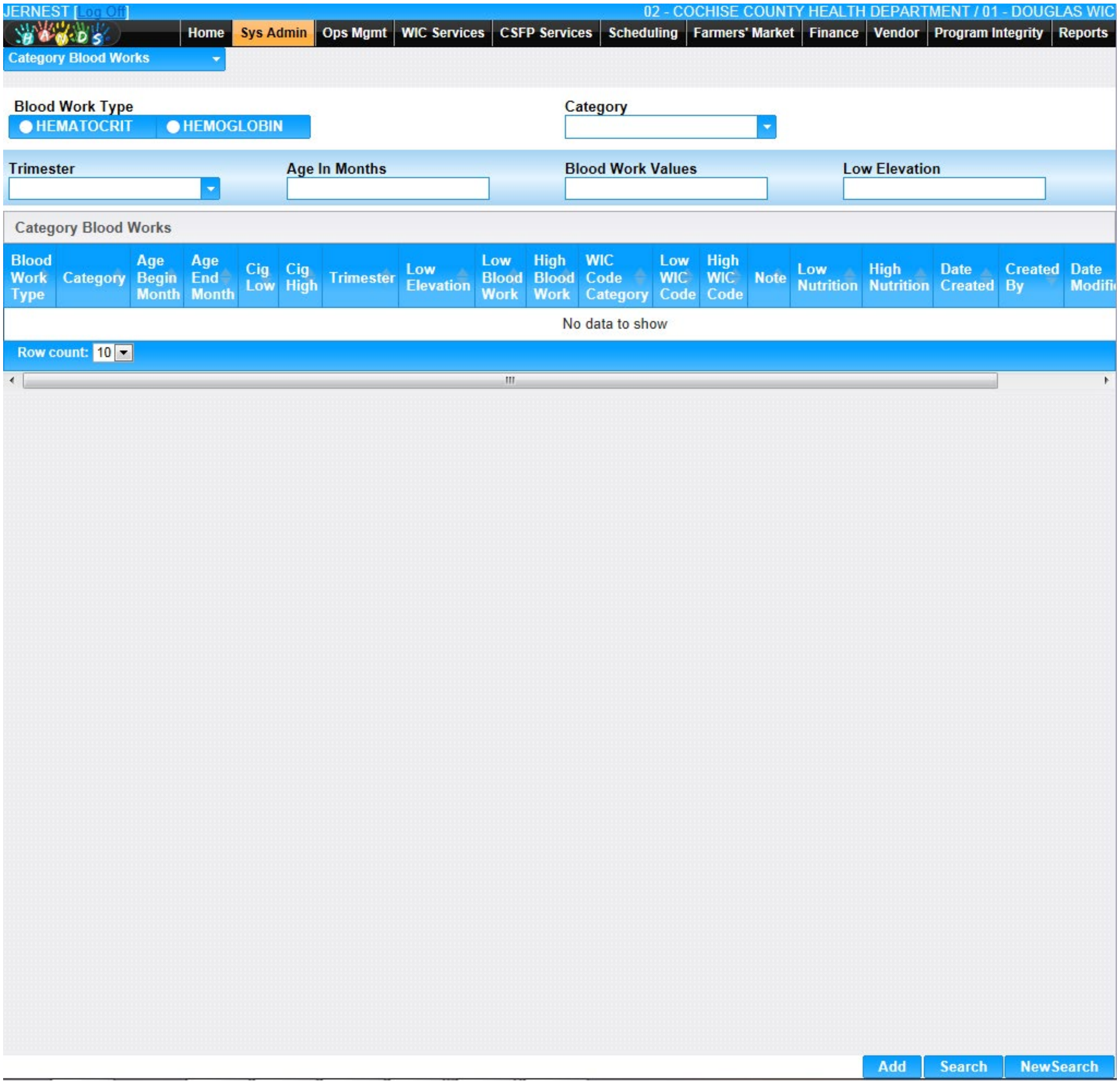


Figure 198: Category Blood Works Base Table

Fields (Search Criteria):

- **Blood Work Type –** Selection options (Hematocrit or Hemoglobin) to determine the blood work type. This field is optional.
- **Category –** The category of the category blood works record. This field is optional and selected from a drop down list.
- **Trimester –** The number of weeks pregnant for the category blood works record. This field is optional.
- **Age In Months –** The number of months between the age begin month and age end month fields for a category blood works record. The user has the ability to enter any value between the begin and end month values of the category blood works record to return desired results. This field is optional.

- **Blood Work Values –** The blood work range between the blood work low and high values. The user has the ability to enter any value between the low and high blood work values of the category blood works record to return desired results. This field is optional.
- **Low Elevation –** The low elevation entered for the category blood works record. The user must enter the exact low elevation value. This field is optional.

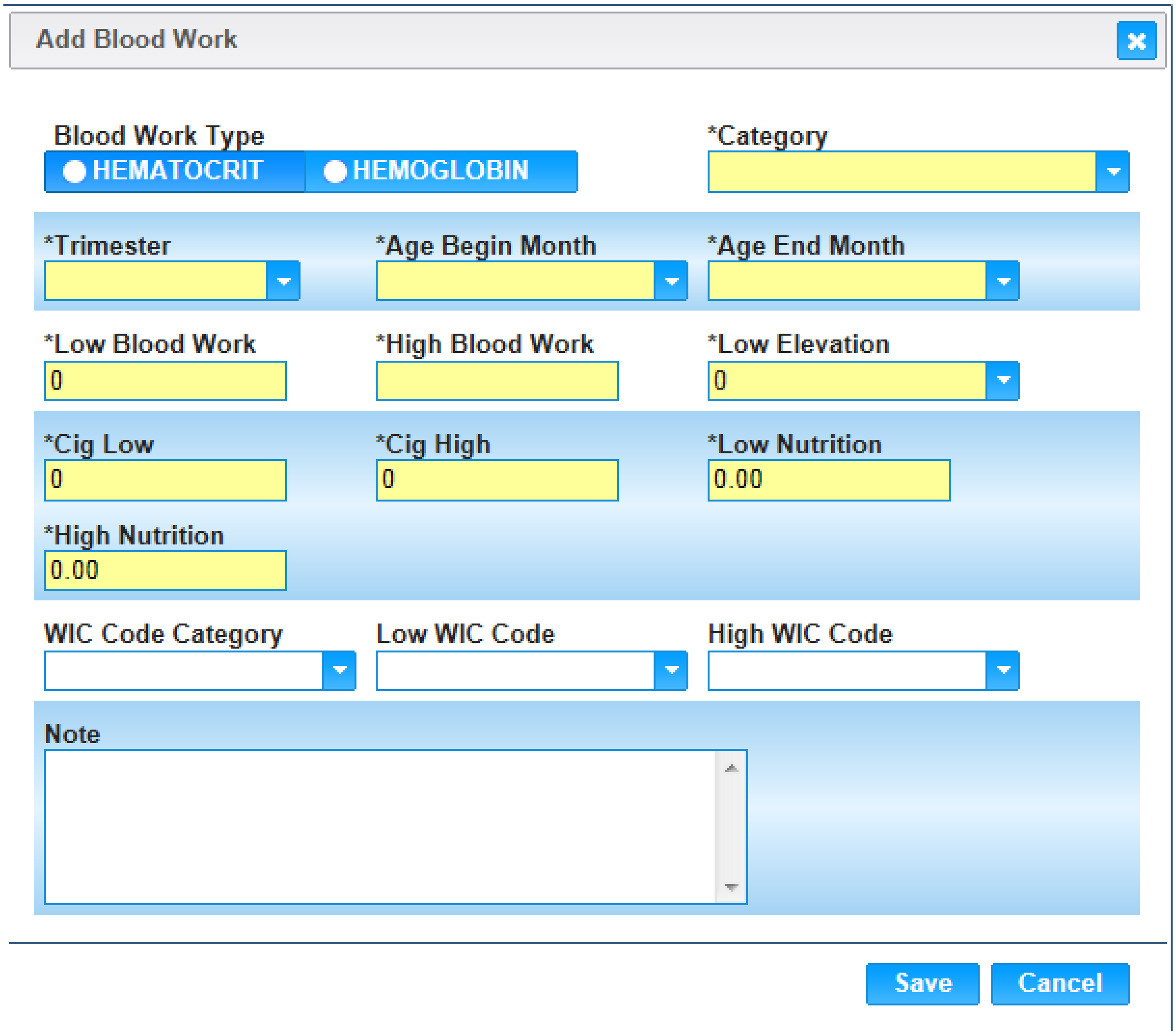


Figure 199: Add a Category Blood Work Record

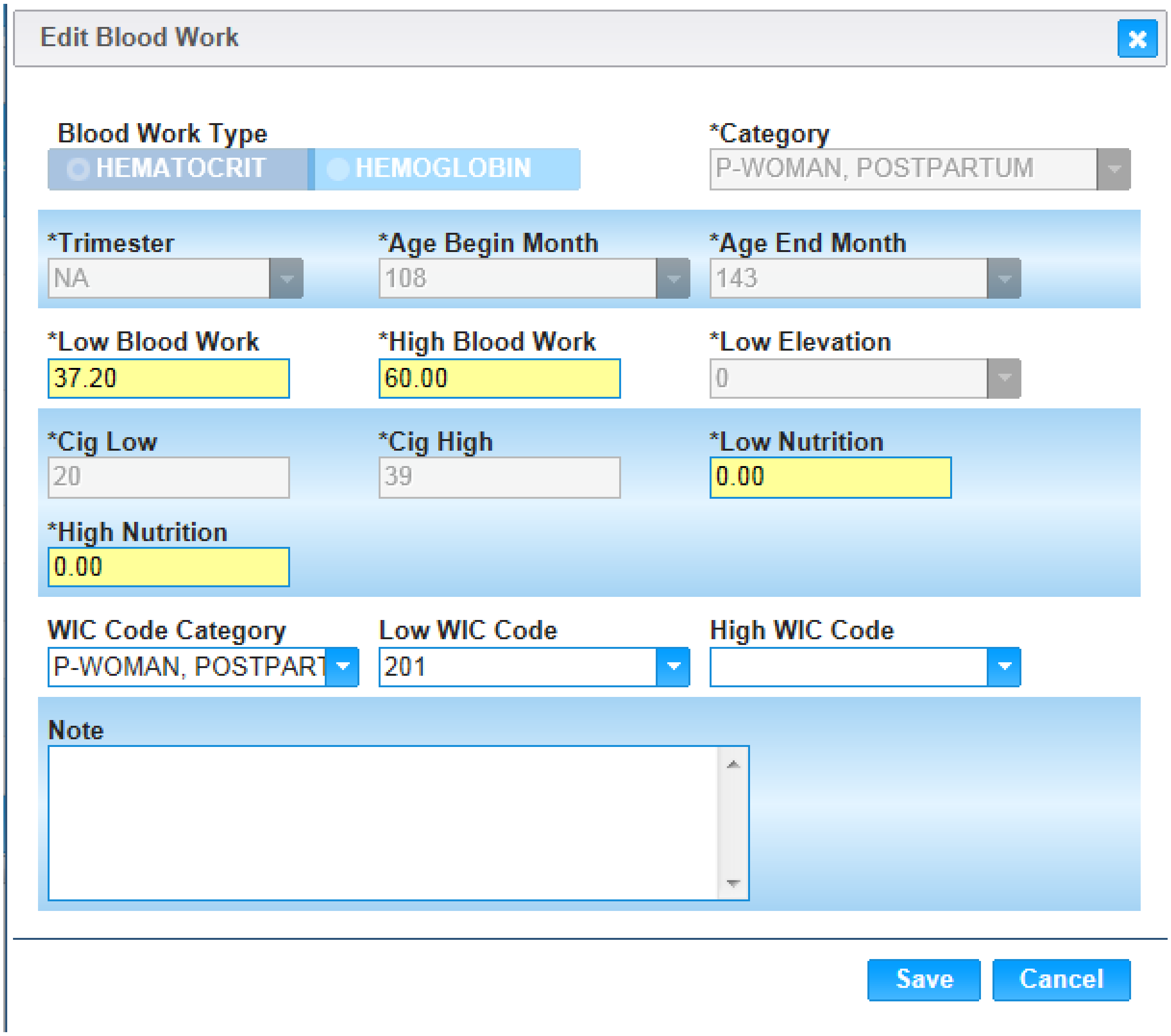


Figure 213: Edit a Category Blood Work Record

Fields:

- **Blood Work Type –** Selection options (Hematocrit or Hemoglobin) to determine the blood works type. This field is mandatory and selected from a drop down list. Options in the drop down list are populated based on data populated in the blood work type base table. This field cannot be edited after the record has been saved.
- **Category –** The category of the category blood works record. This field is mandatory and selected from a drop down list. Options in the drop down list are populated based on data populated in the categories base table. This field cannot be edited after the record has been saved.
- **Trimester –** The number of weeks pregnant for the category blood works record. This field is mandatory and selected from a drop down list. The drop down list will filter results based on the category selected. This field cannot be edited after the record has been saved.
- **Age Begin Month –** The age in months that the Client's current age must be greater than or equal to in order to qualify for inclusion as a member of the age range defined by the record. This field is mandatory and selected from a drop down list. The drop down list

will filter results based on the category selected and populate based on data populated in the age ranges base table. This field cannot be edited after the record has been saved.

- **Age End Month –** The age in months that the Client's current age must be less than or equal to in order to qualify for inclusion as a member of the age range defined by the record. This field is mandatory and selected from a drop down list. The drop down list will filter results based on the category selected and populate based on data populated in the age ranges base table. This field cannot be edited after the record has been saved.
- **Low Blood Work –** The low blood work value for the category blood works record. This field is mandatory, defaults to zero, and accepts a maximum of two numeric characters followed by two decimal points.
- **High Blood Work –** The high blood work value for the category blood works record. This field is mandatory, defaults to zero, and accepts a maximum of two numeric characters followed by two decimal points. The value entered cannot be less than the low blood work record entered.
- **Low Elevation –** The low end of the elevation range for the category blood works record. This field is mandatory and selected from a drop down list. Options in the drop down list are populated based on data populated in the elevations base table. This field cannot be edited after the record has been saved.
- **Cig Low –** The low number of cigarettes smoked per day. This field is mandatory and accepts a maximum of two numeric characters. Derived from Pnss user's manual pages 5-32, 5-35, 5-55 June1994. This field cannot be edited after the record has been saved.
- **Cig High –** The high number of cigarettes smoked per day. This field is mandatory and accepts a maximum of two numeric characters. The Cig High value entered must be greater than the Cig Low value entered. Derived from Pnss user's manual pages 5-32, 5-35, 5-55 June1994. This field cannot be edited after the record has been saved.
- **Low Nutrition –** The low nutrition blood work value for the category blood works record. This field is mandatory, defaults to zero, and accepts a maximum of two numeric characters followed by two decimal points. The value entered cannot be less than the low blood work records entered.
- **High Nutrition –** The high nutrition blood work value for the category blood works record. This field is mandatory, defaults to zero, and accepts a maximum of two numeric characters followed by two decimal points. The value entered cannot be less than the low blood works record entered.
- **WIC Code Category –** The Client category for the category blood works record. This field is optional and selected from a drop down list. Options in the drop down list are populated based on data populated in the categories base table.
  NOTE: The Low WIC Code and High WIC Code fields will be filtered based on the category selected for the WIC Code Category.
- **Low WIC Code –** The WIC Code that will be assigned if the entered Client's blood work data falls below the low blood work value for the category blood works record. This field is optional and selected from a drop down list. Options in the drop down list are filtered based on the WIC Code category selected and populated based on data populated in the risk factors base table.
- **High WIC Code –** The WIC Code that will be assigned if the entered Client's blood work data falls above the high blood work value for the category blood works record. This field is optional and selected from a drop down list. Options in the drop down list

are filtered based on the WIC Code category selected and populated based on data populated in the risk factors base table.

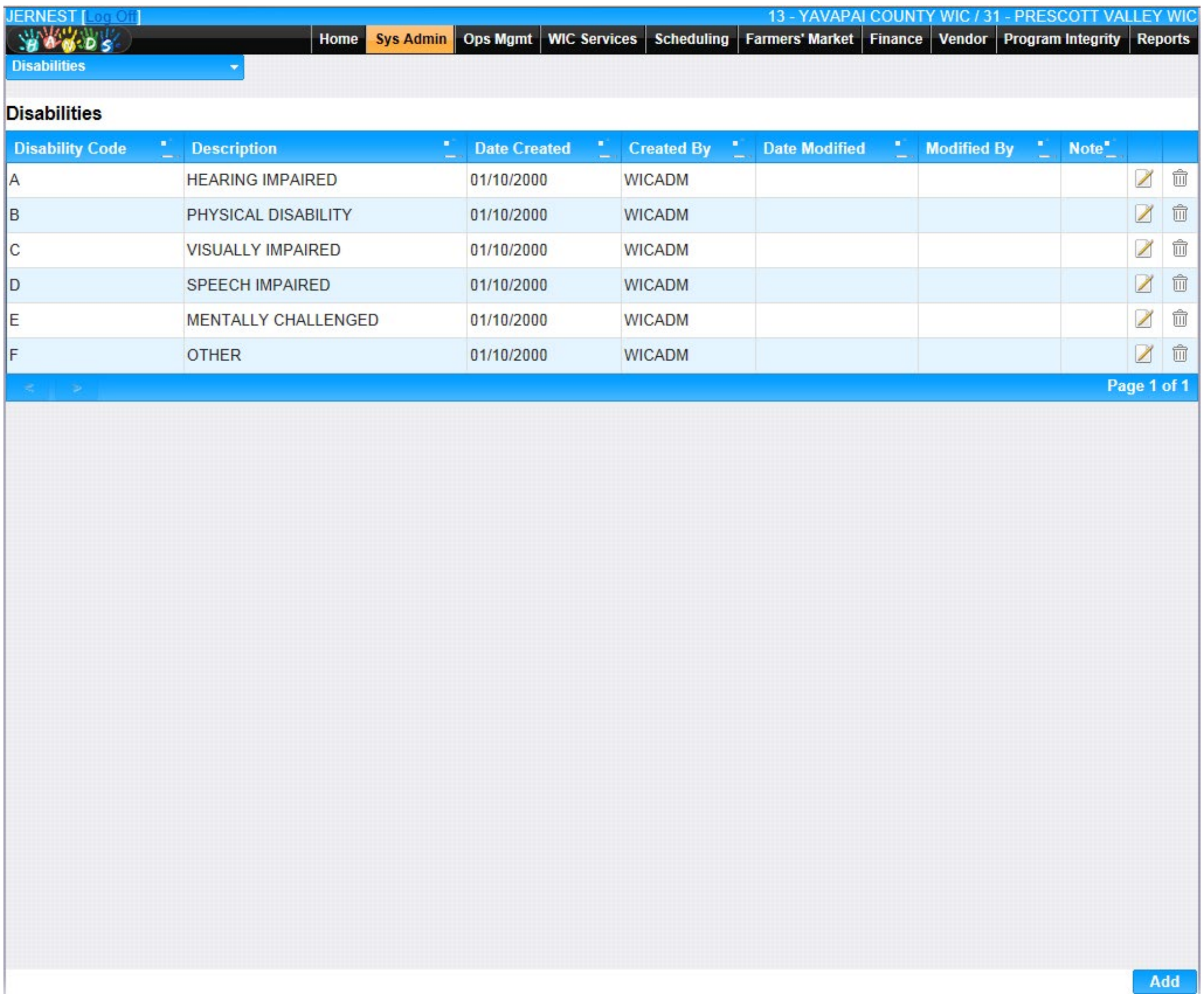
Calculations: None

Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple category blood work records so that they have the same blood work type, category, trimester, age begin and end month values, low and high blood work values, low elevation, and cig low and high values.

16.6 Disabilities

Narrative:
The purpose of this page is to add and maintain disability reasons for the system. The disability reasons displayed in the base table are used on the Client registration and Client information pages to populate the Disability drop down list.



Disability Code	Description	Date Created	Created By	Date Modified	Modified By	Note
A	HEARING IMPAIRED	01/10/2000	WICADM			
B	PHYSICAL DISABILITY	01/10/2000	WICADM			
C	VISUALLY IMPAIRED	01/10/2000	WICADM			
D	SPEECH IMPAIRED	01/10/2000	WICADM			
E	MENTALLY CHALLENGED	01/10/2000	WICADM			
F	OTHER	01/10/2000	WICADM			

Figure 200: Disabilities Base Table

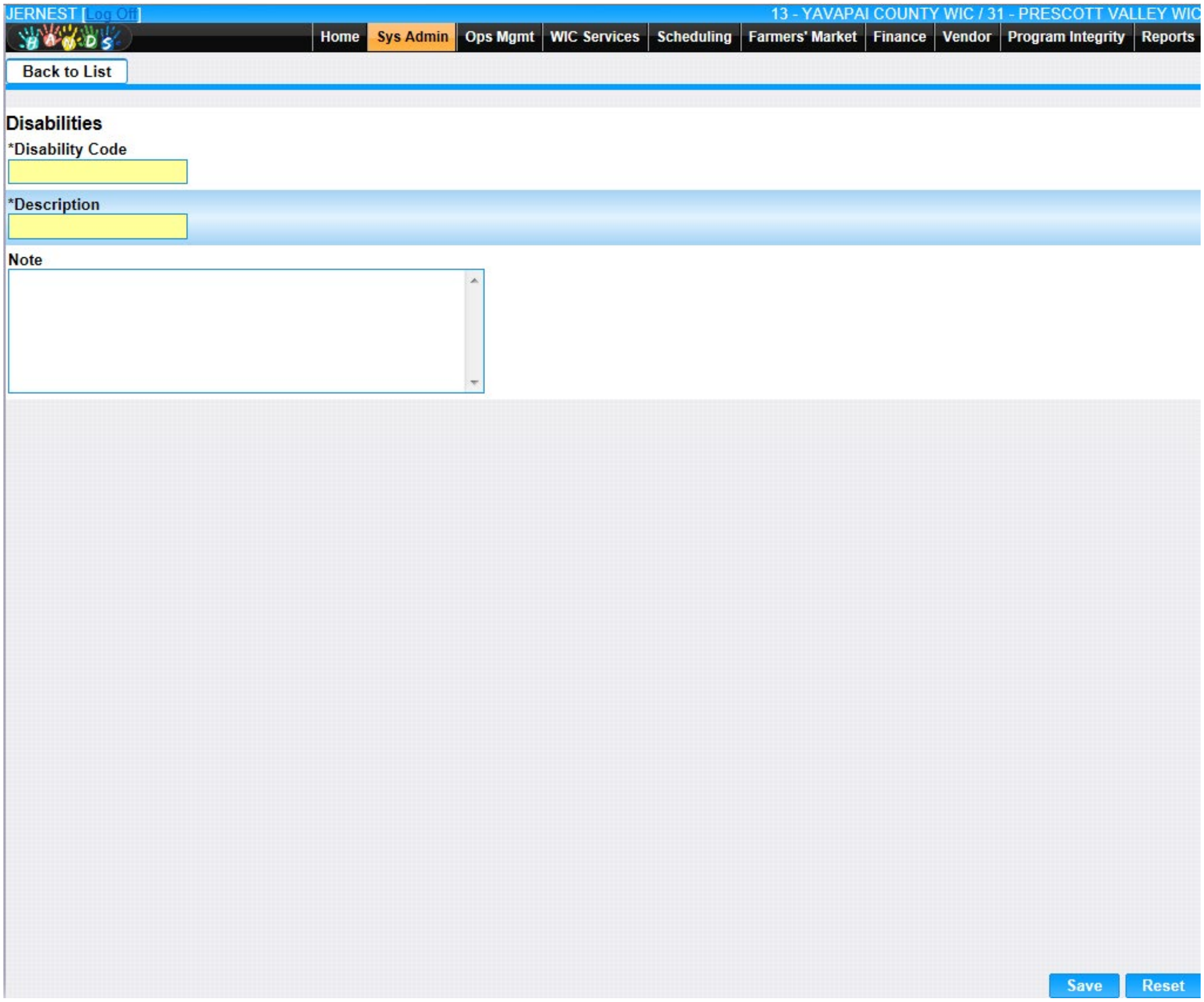


Figure 201: Add a Disability Record

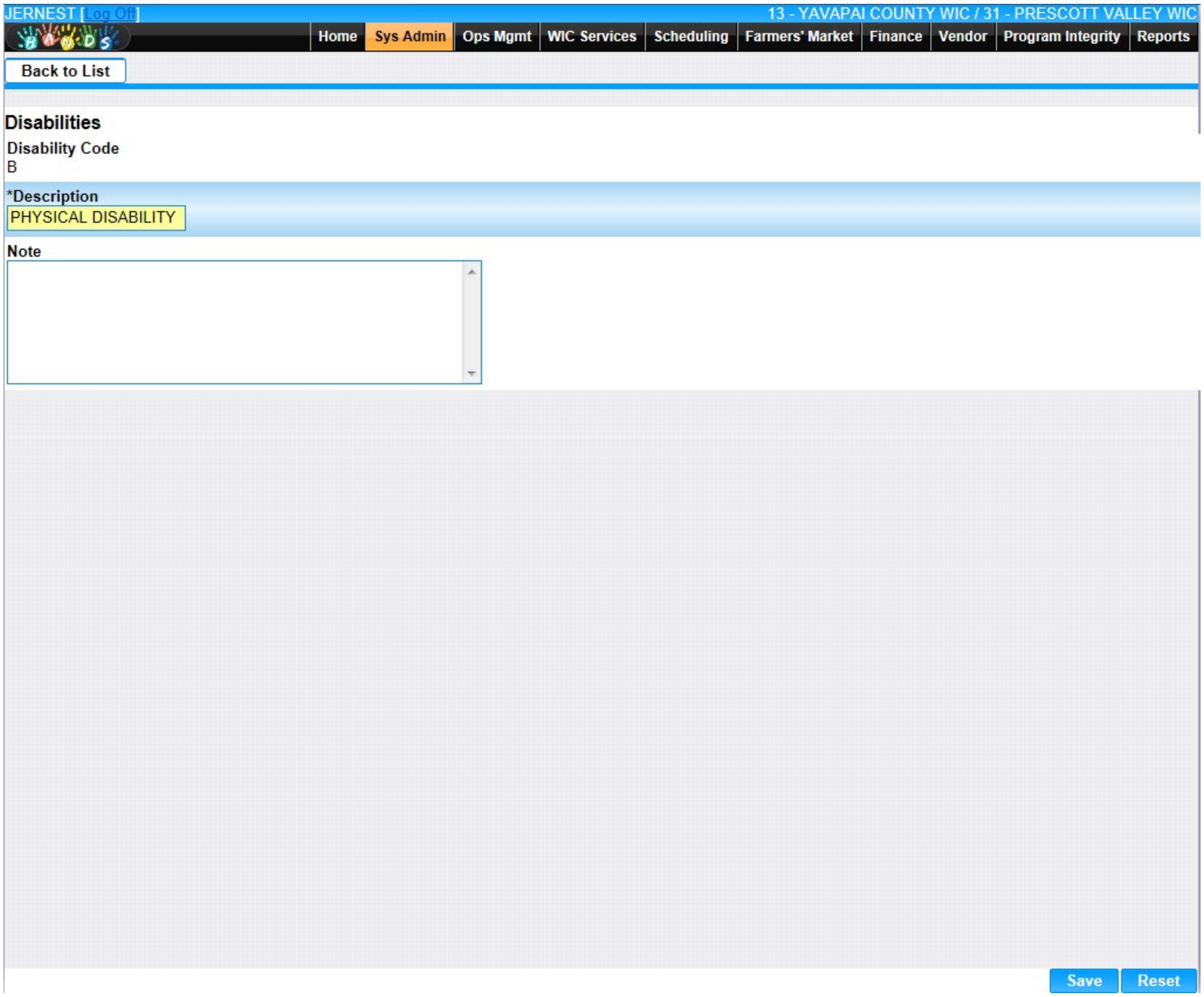


Figure 202: Edit a Disability Record

Fields:

- **Disability Code –** The unique user assigned code for the disability. This field is mandatory and accepts a max of three alphanumeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the disability. This field is mandatory and accepts up to 60 alphanumeric / special characters.

Calculations: None

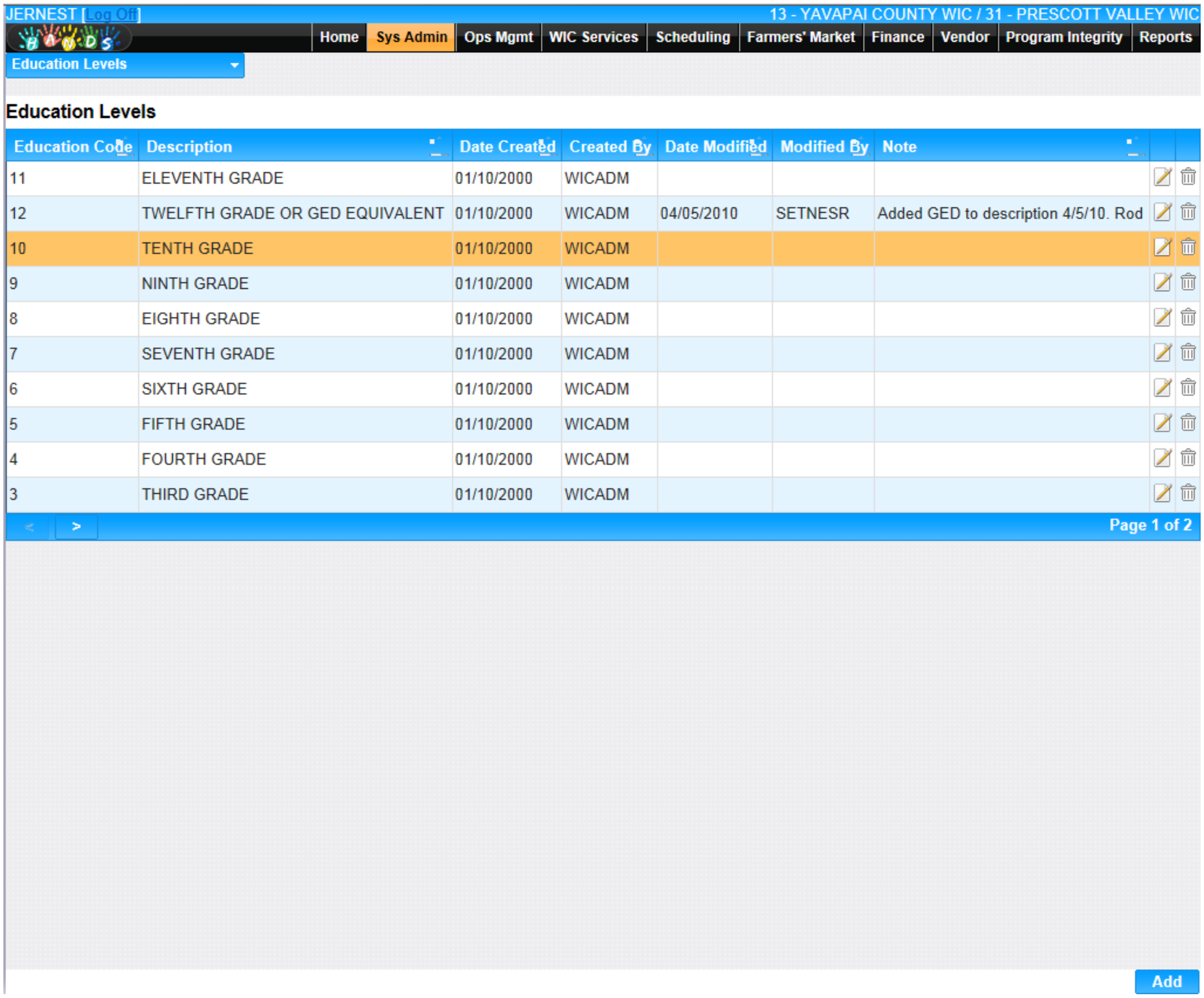
Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple disability records so that they have the same disability code.

16.7 Education Levels

Narrative:

The purpose of this page is to add and maintain education level records for the system. The education levels displayed in the base table are used on the Family information page to populate the Education Level drop down list.



Education Code	Description	Date Created	Created By	Date Modified	Modified By	Note
11	ELEVENTH GRADE	01/10/2000	WICADM			
12	TWELFTH GRADE OR GED EQUIVALENT	01/10/2000	WICADM	04/05/2010	SETNESR	Added GED to description 4/5/10. Rod
10	TENTH GRADE	01/10/2000	WICADM			
9	NINTH GRADE	01/10/2000	WICADM			
8	EIGHTH GRADE	01/10/2000	WICADM			
7	SEVENTH GRADE	01/10/2000	WICADM			
6	SIXTH GRADE	01/10/2000	WICADM			
5	FIFTH GRADE	01/10/2000	WICADM			
4	FOURTH GRADE	01/10/2000	WICADM			
3	THIRD GRADE	01/10/2000	WICADM			

Figure 203: Education Levels Base Table

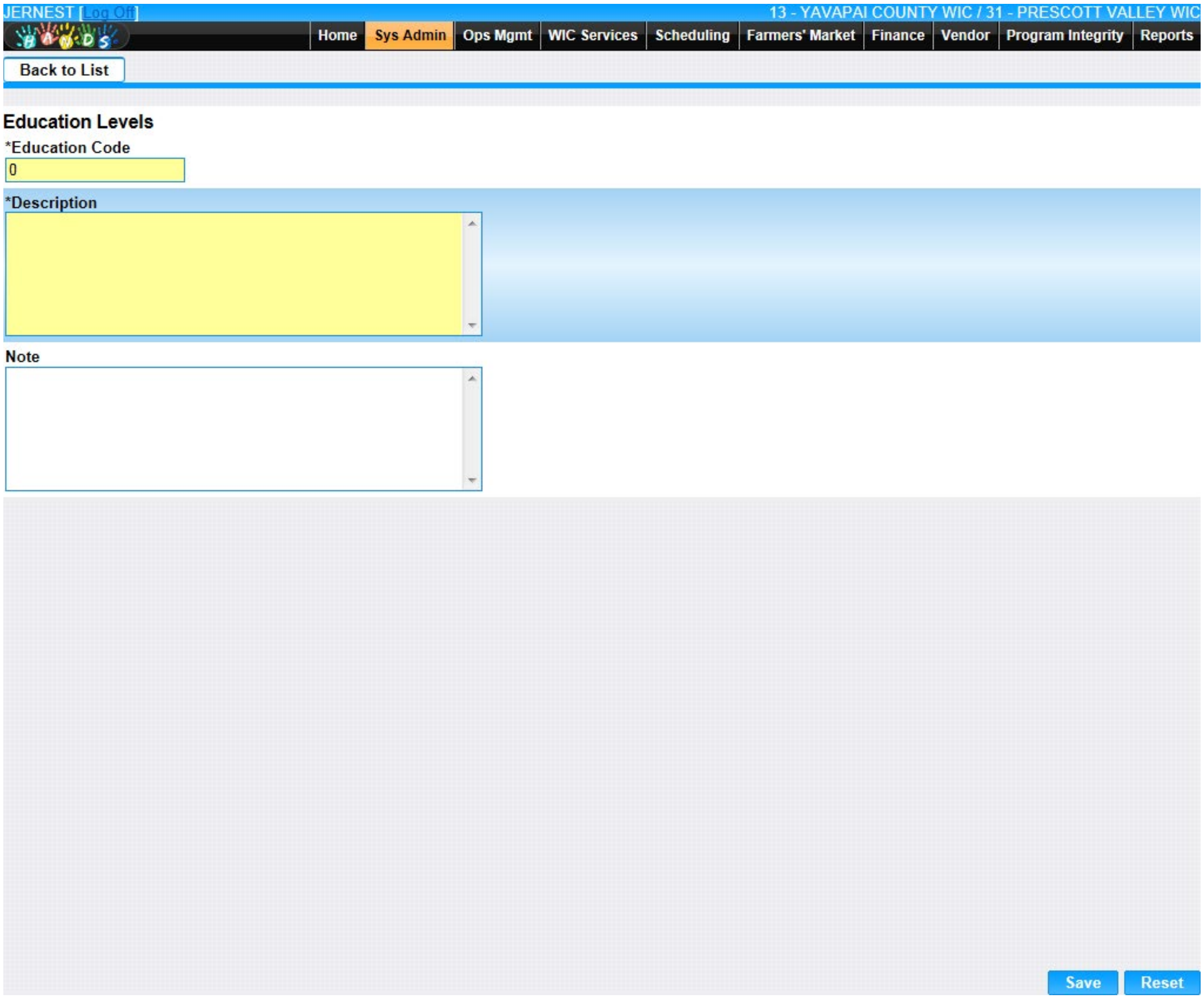


Figure 204: Add an Education Level Record

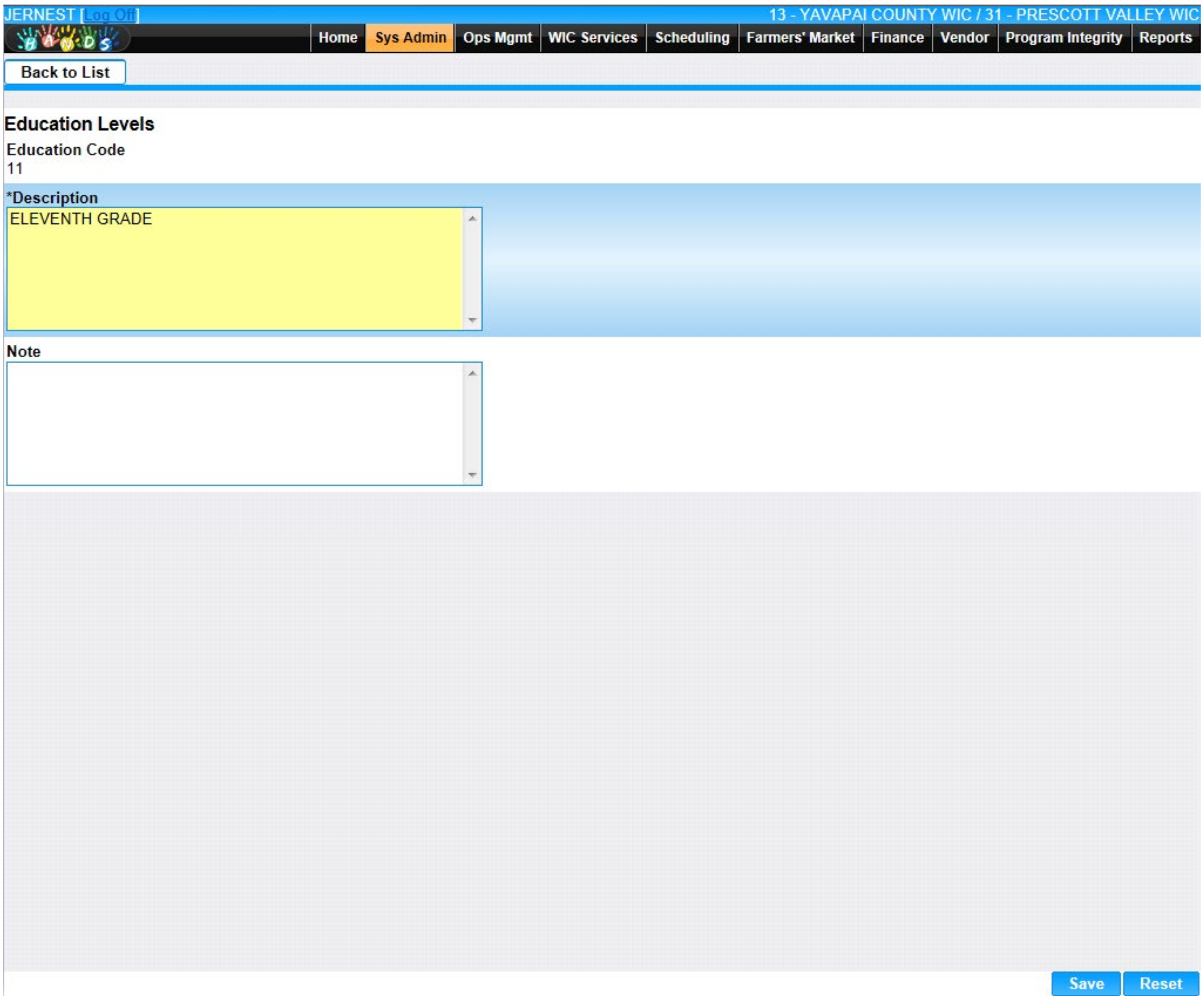


Figure 205: Edit an Education Level Record

Fields:

- **Education Code –** The unique user assigned code for the education level. This field is mandatory and accepts a max of two numeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the education. This field is mandatory and accepts up to 120 alphanumeric / special characters.

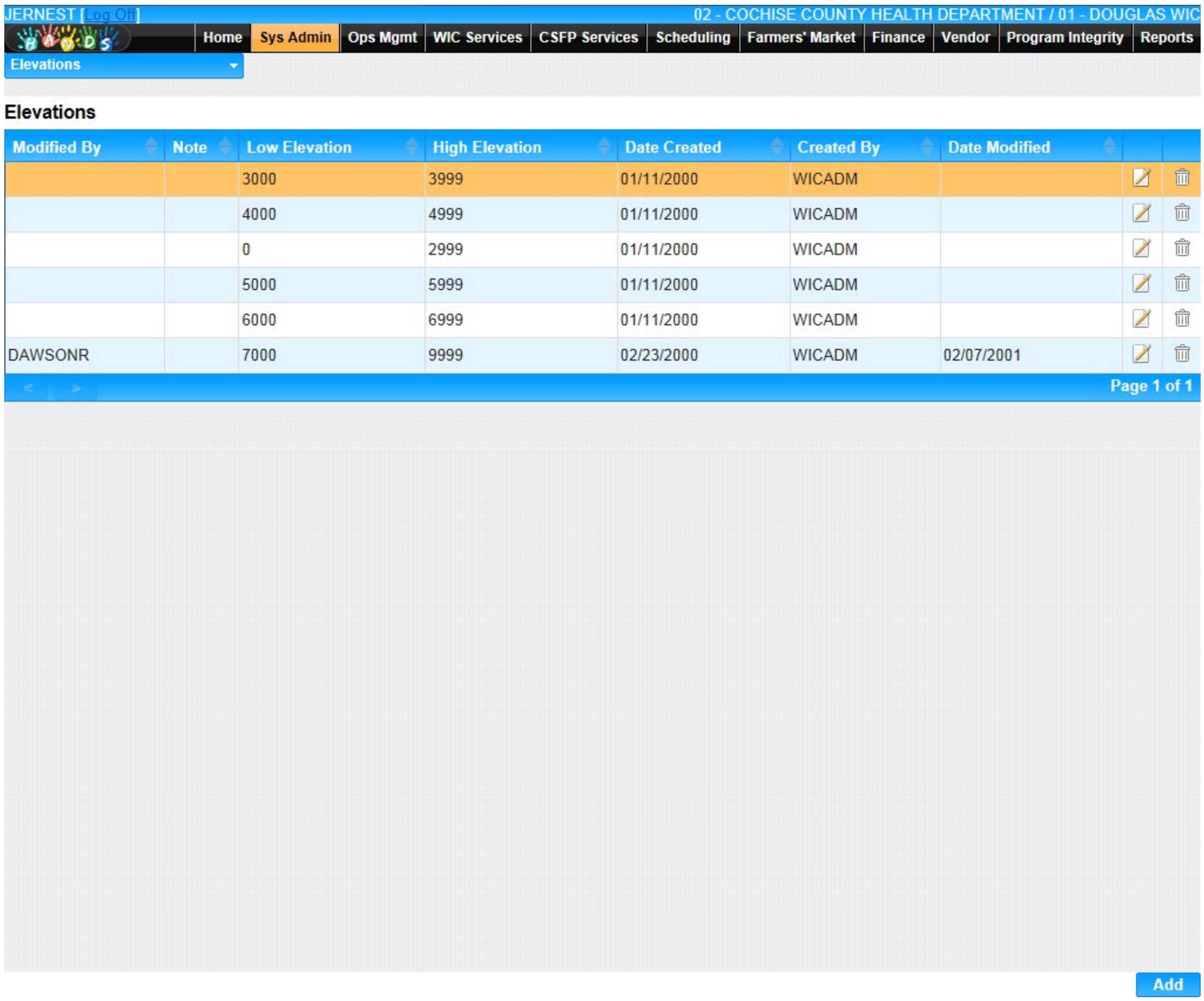
Calculations: None

Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple education level records so that they have the same education code.

16.8 Elevations

Narrative: The purpose of this page is to add and maintain elevation range records for the system. The elevation ranges displayed in the base table are used in the category blood work base table to populate the elevations drop down list.



Modified By	Note	Low Elevation	High Elevation	Date Created	Created By	Date Modified		
		3000	3999	01/11/2000	WICADM			
		4000	4999	01/11/2000	WICADM			
		0	2999	01/11/2000	WICADM			
		5000	5999	01/11/2000	WICADM			
		6000	6999	01/11/2000	WICADM			
DAWSONR		7000	9999	02/23/2000	WICADM	02/07/2001		

Figure 206: Elevations Base Table

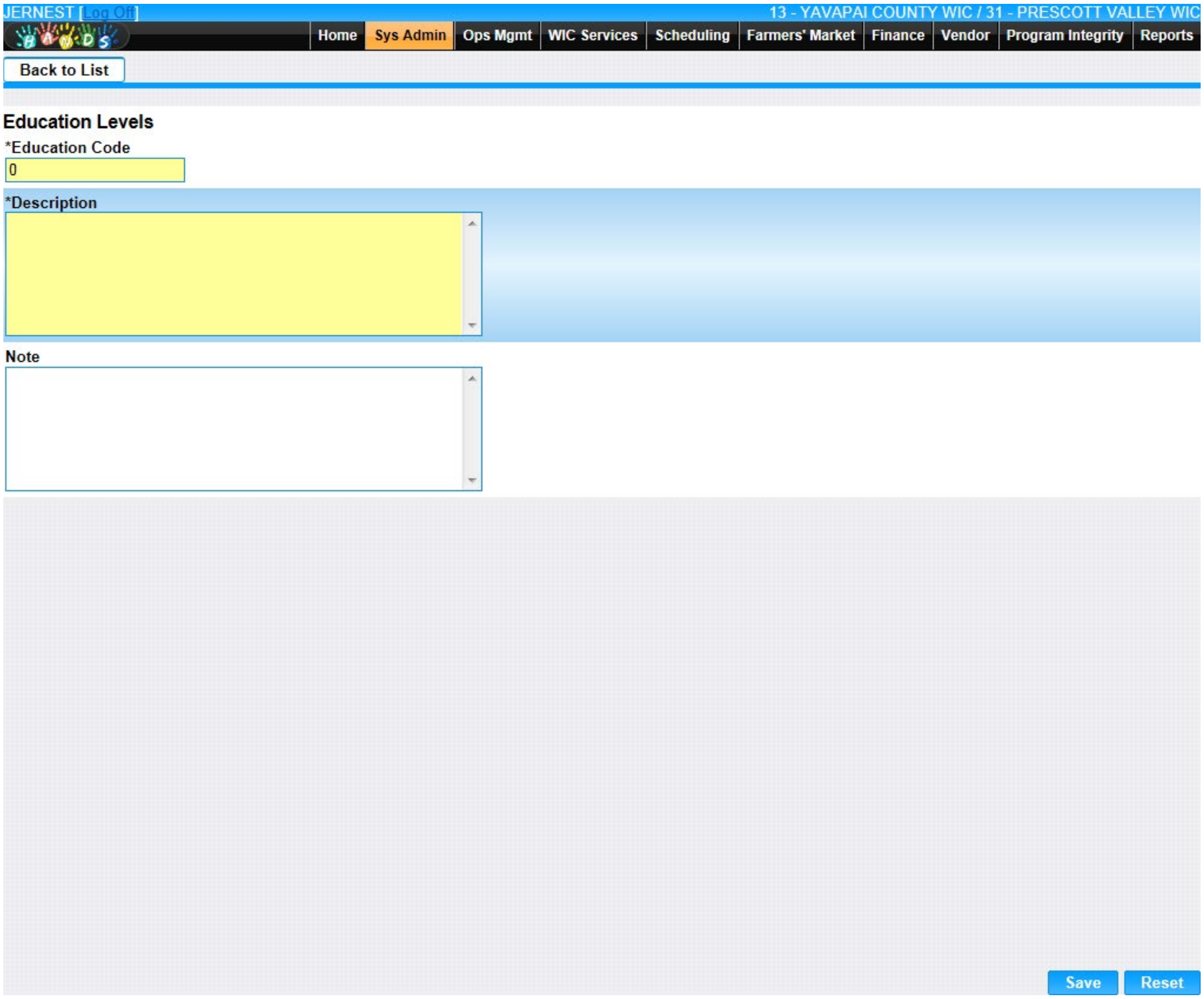


Figure 207: Add an Elevation Record

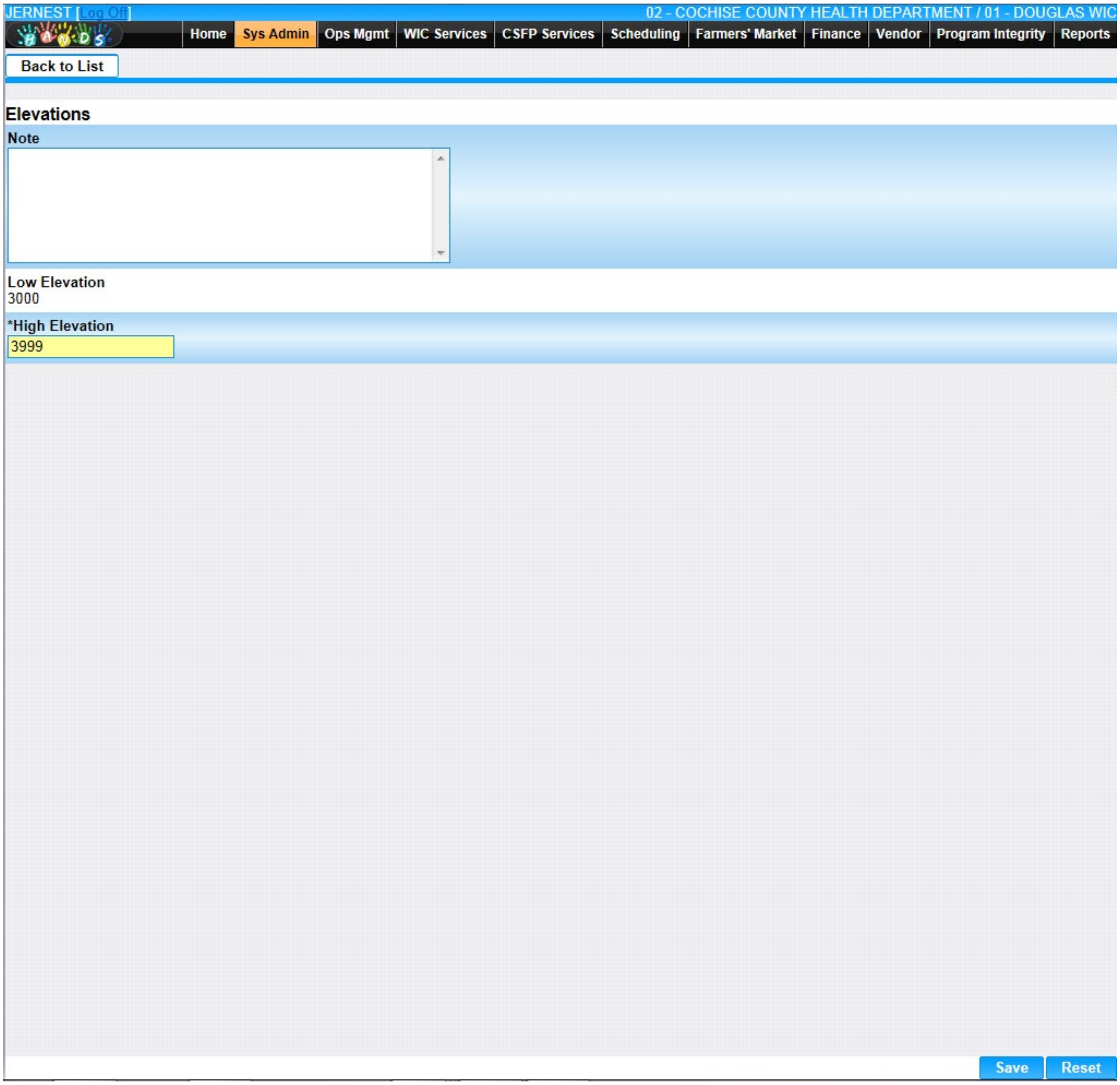


Figure 208: Edit an Elevation Record

Fields:

- **Low Elevation –** The low range for the elevation record. This field is mandatory and accepts a maximum of five numeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **High Elevation –** The high range for the elevation record. This field is mandatory and accepts a maximum of five numeric characters. The value entered here must be greater than the low elevation value entered.

Calculations: None

Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple elevation records so that they have the same low elevation value.

16.9 Income Intervals

Narrative: The purpose of this page is to add and maintain income interval records for the system. The income interval records displayed in the base table are used on the income page to populate the interval drop down list.

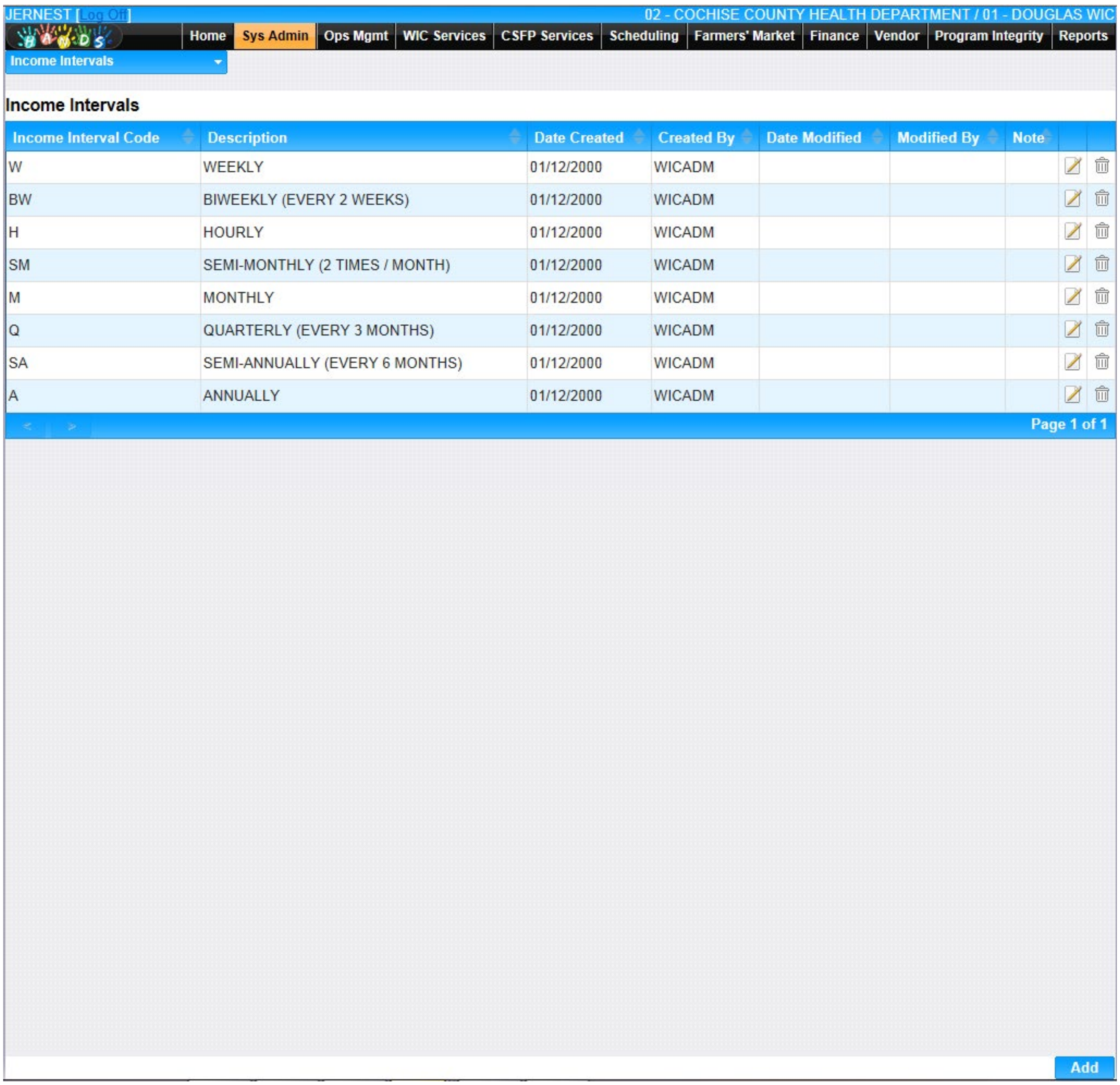


Figure 209: Income Interval Base Table

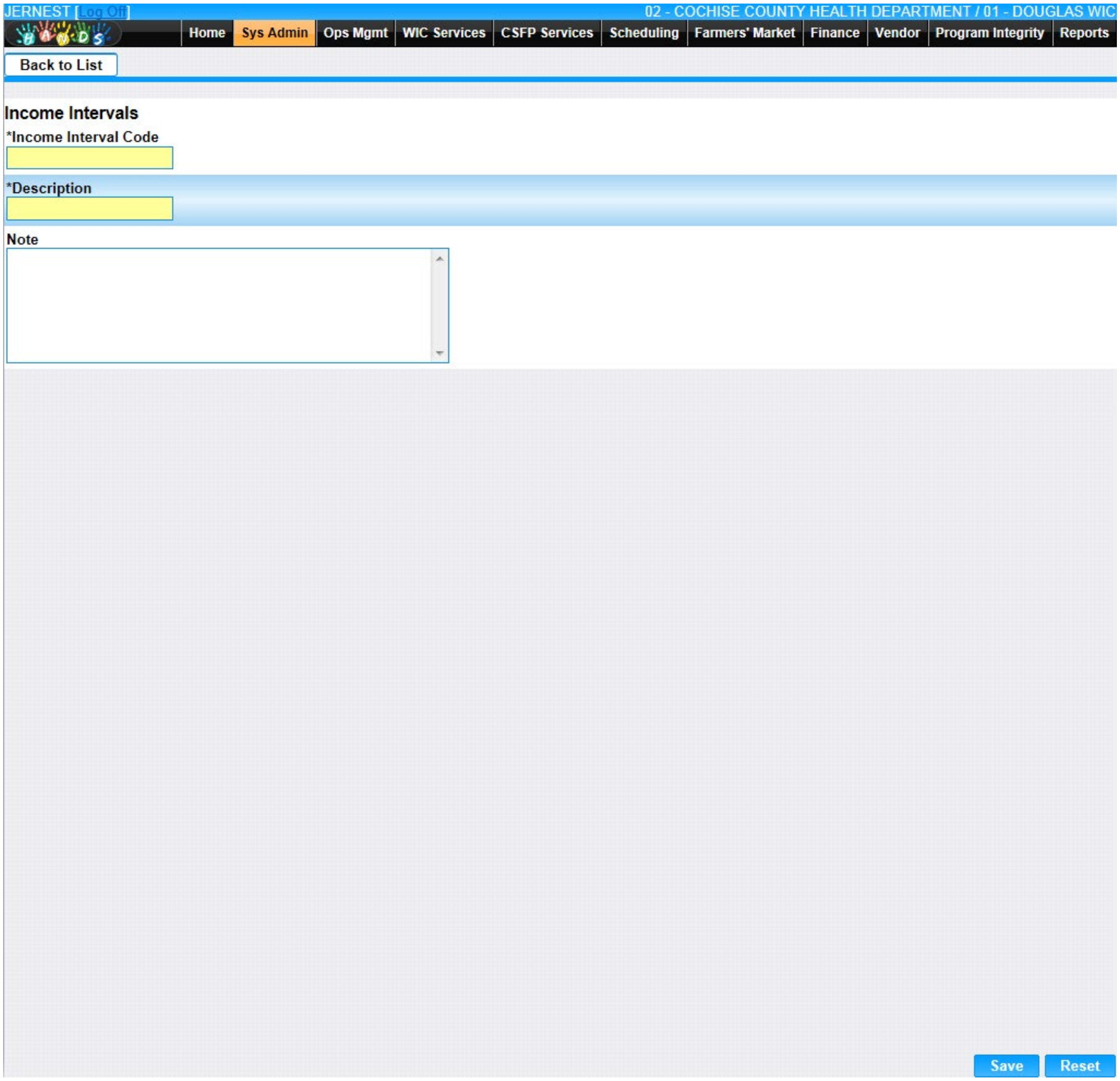


Figure 210: Add an Income Interval Record

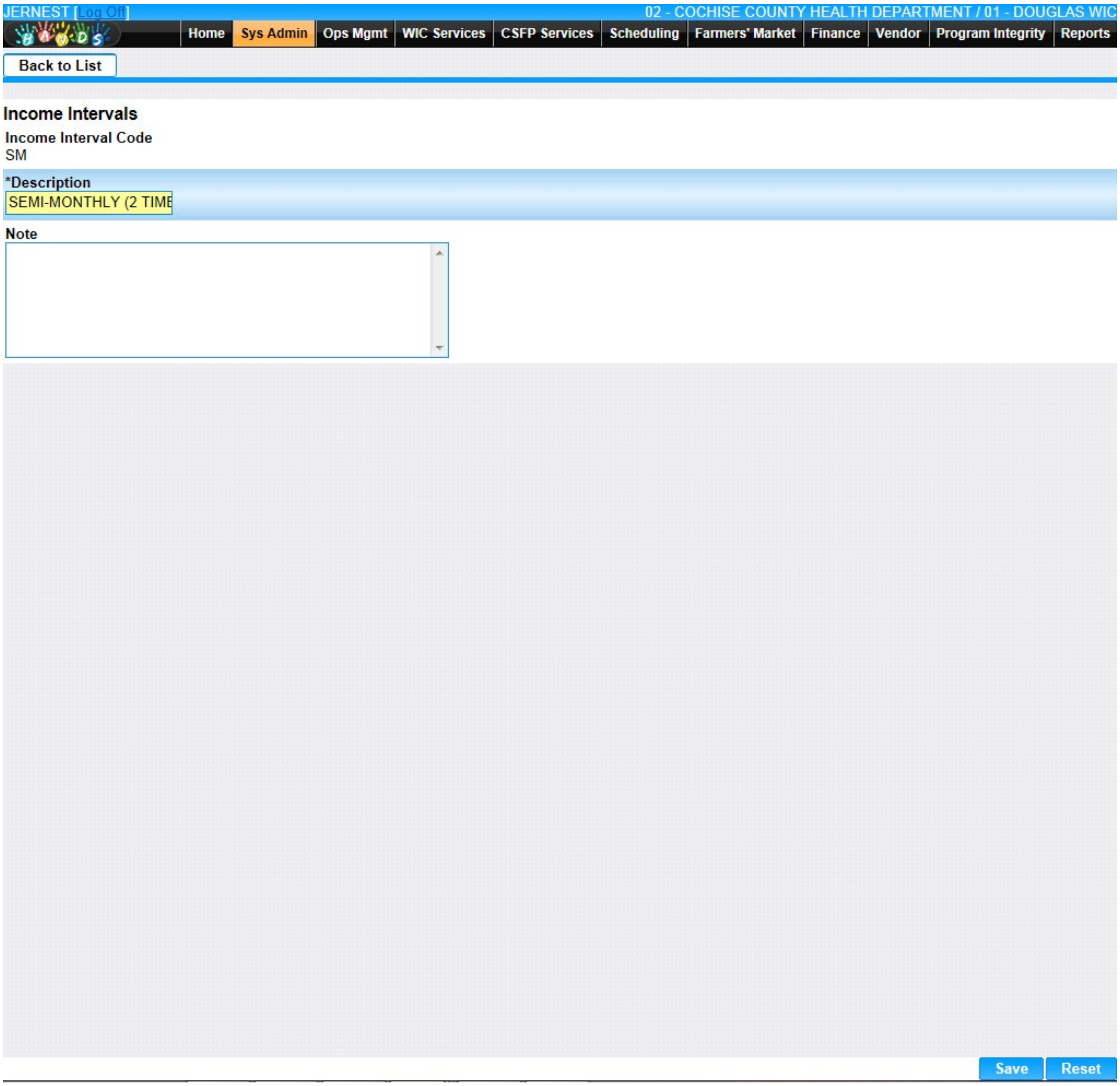


Figure 211: Edit an Income Interval Record

Fields:

- **Income Interval Code –** The unique user assigned code for the income interval record. This field is mandatory and accepts a max of two alphanumeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the income interval. This field is mandatory and accepts up to 60 alphanumeric / special characters.

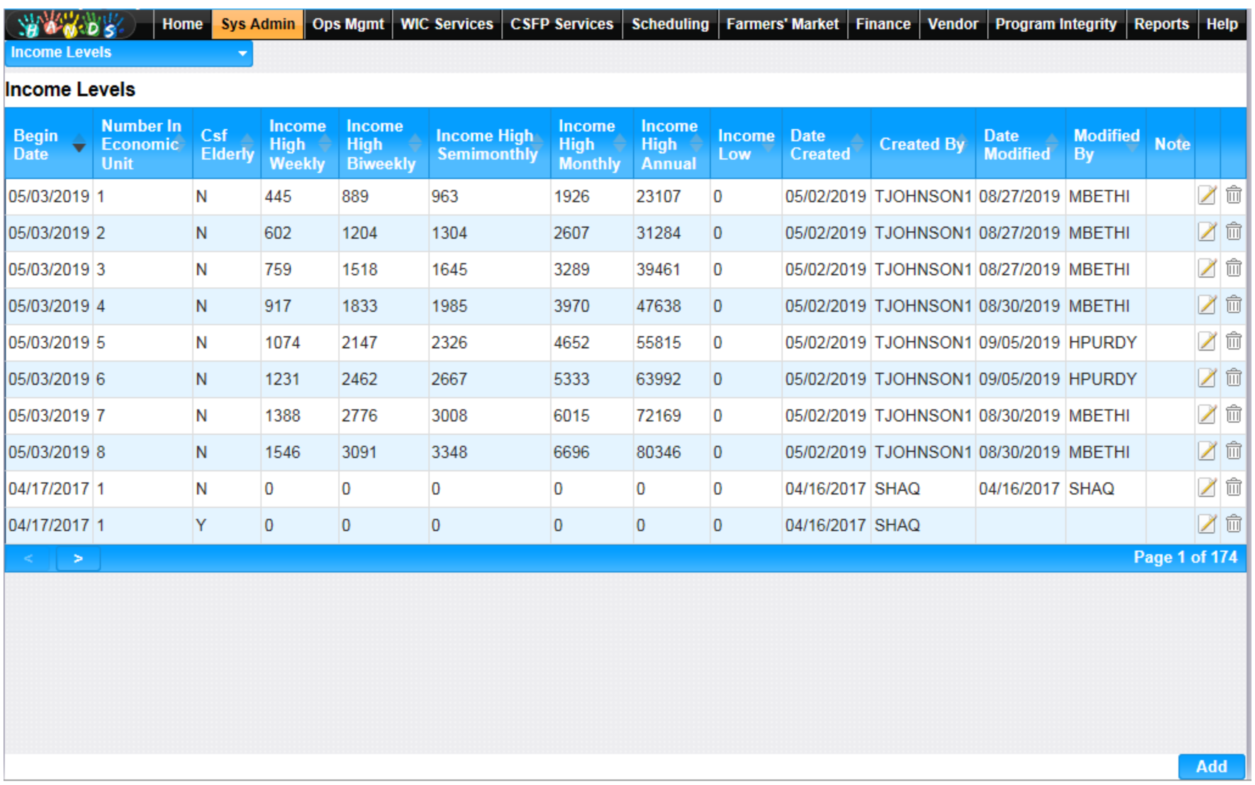
Calculations: None

Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple income interval records so that they have the same income interval code.

16.10 Income Levels

Narrative: The purpose of this page is to add and maintain income level records for the system. The income level records displayed in the base table are used on the income page to determine if a Client is income eligible or not. A Client's monthly income and family size (number in economic unit) is used to find the corresponding high/low income value in the table. If the Client's monthly income is determined to be greater than the corresponding record in the table then the Client is considered income ineligible and an error will be displayed on the income page.



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

Income Levels

Income Levels

Begin Date	Number In Economic Unit	Csf Elderly	Income High Weekly	Income High Biweekly	Income High Semimonthly	Income High Monthly	Income High Annual	Income Low	Date Created	Created By	Date Modified	Modified By	Note
05/03/2019	1	N	445	889	963	1926	23107	0	05/02/2019	TJOHNSON1	08/27/2019	MBETHI	
05/03/2019	2	N	602	1204	1304	2607	31284	0	05/02/2019	TJOHNSON1	08/27/2019	MBETHI	
05/03/2019	3	N	759	1518	1645	3289	39461	0	05/02/2019	TJOHNSON1	08/27/2019	MBETHI	
05/03/2019	4	N	917	1833	1985	3970	47638	0	05/02/2019	TJOHNSON1	08/30/2019	MBETHI	
05/03/2019	5	N	1074	2147	2326	4652	55815	0	05/02/2019	TJOHNSON1	09/05/2019	HPURDY	
05/03/2019	6	N	1231	2462	2667	5333	63992	0	05/02/2019	TJOHNSON1	09/05/2019	HPURDY	
05/03/2019	7	N	1388	2776	3008	6015	72169	0	05/02/2019	TJOHNSON1	08/30/2019	MBETHI	
05/03/2019	8	N	1546	3091	3348	6696	80346	0	05/02/2019	TJOHNSON1	08/30/2019	MBETHI	
04/17/2017	1	N	0	0	0	0	0	0	04/16/2017	SHAQ	04/16/2017	SHAQ	
04/17/2017	1	Y	0	0	0	0	0	0	04/16/2017	SHAQ			

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Add

Figure 212: Income Level Base Table

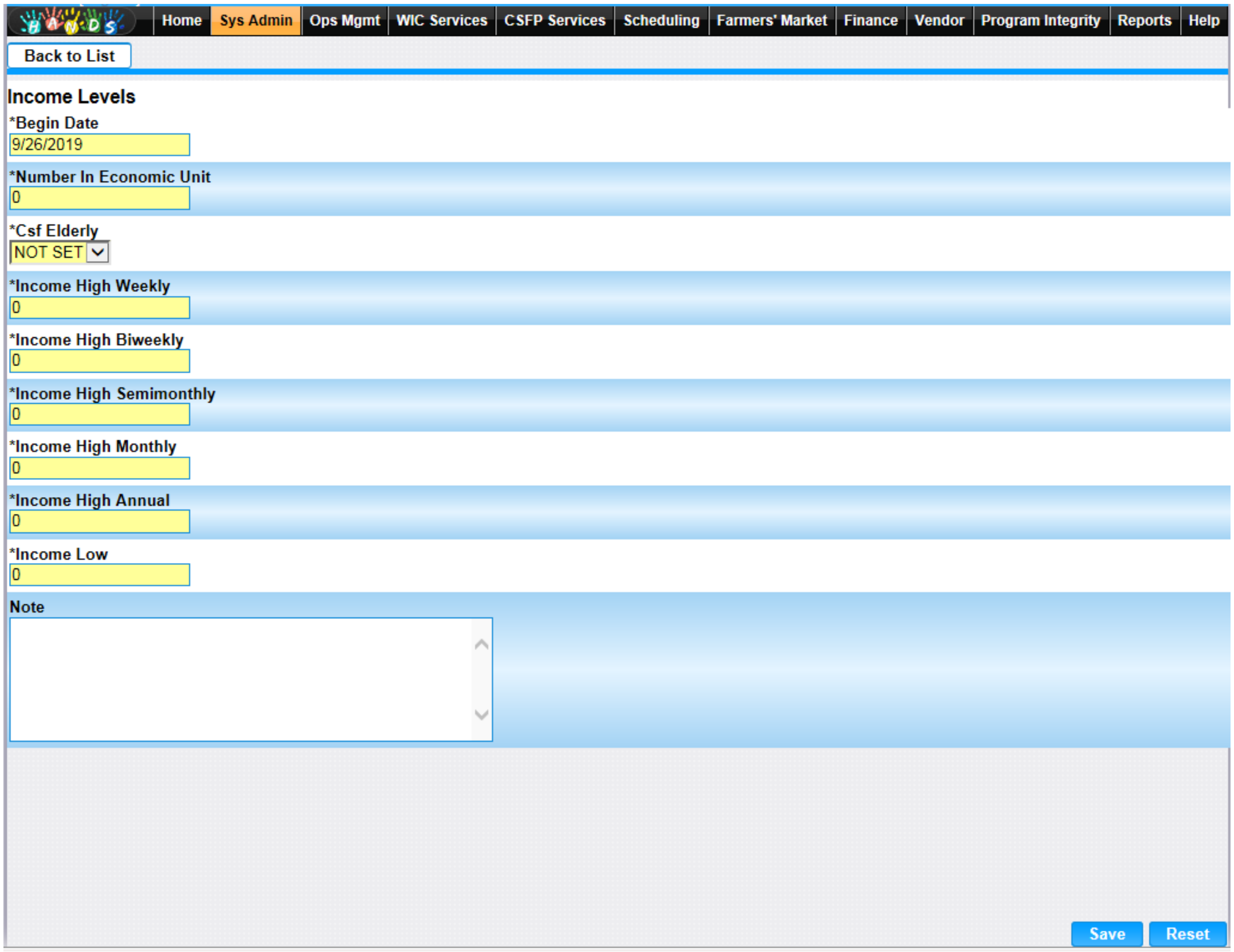


Figure 213: Add an Income Level Record

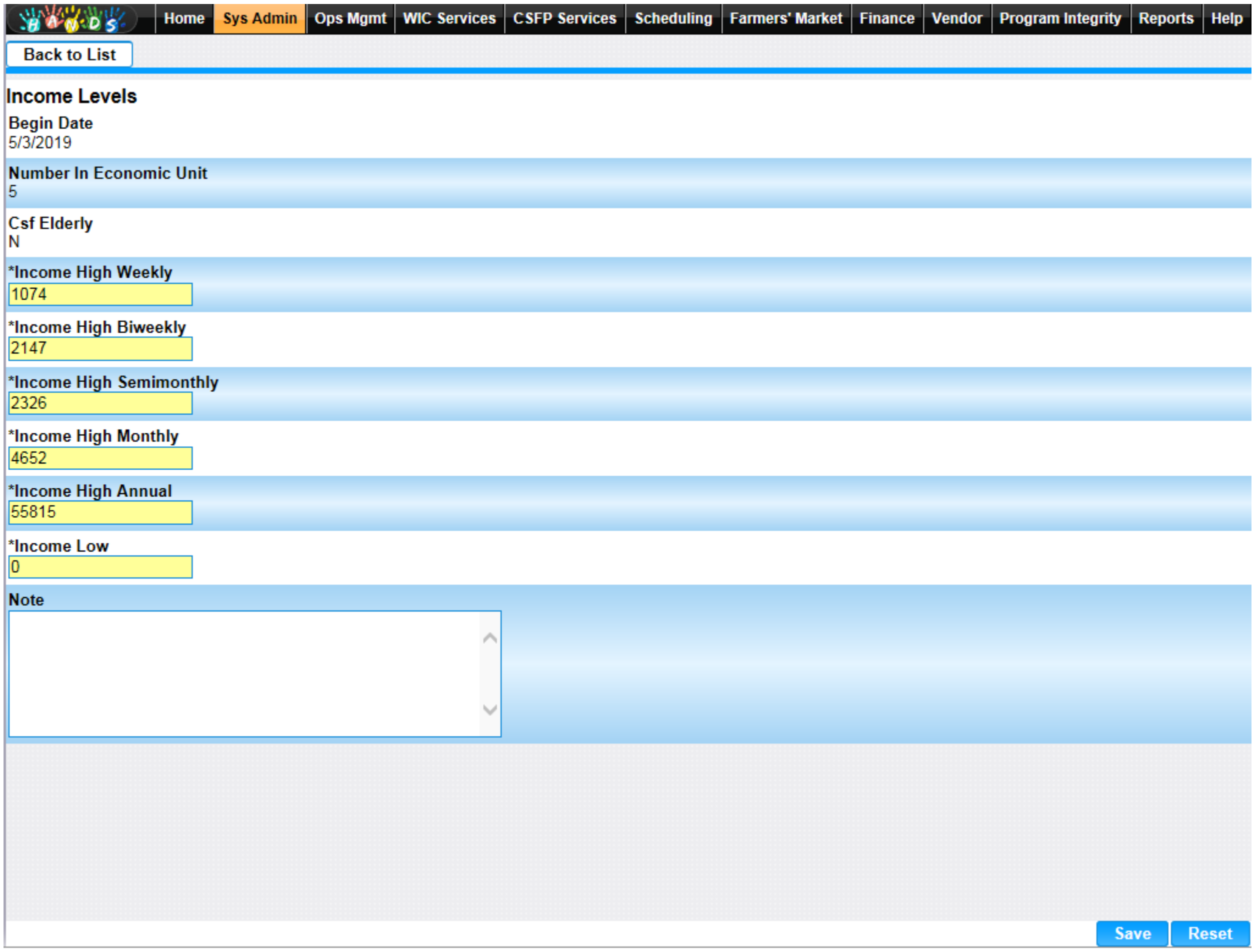


Figure 214: Edit an Income Level Record

Fields:

- **Begin Date –** The date that the income level record becomes valid and will be used to calculate the Clients income eligibility in the system. This field is mandatory, defaults to today's date, and cannot be edited. If the date entered is greater than today's date, then the income level record will not be used to calculate a Client's income eligibility until today's date is equal to or greater than the date entered.
- **Number In Economic Unit –** The number of members in the family to be used in the income eligibility calculation. This number is taken from the Family size field on the Client's income page. This field is mandatory, accepts a maximum of two numeric characters, and cannot be edited.
- **Csf Elderly –** A drop down list to determine if the income level record is used to determine if the income level record should be used for WIC or CSFP Clients. If the Yes option is selected, then the income level record will be used to calculate income eligibility for CSFP Clients only. If the No option is selected, then the income level record will be used to calculate income eligibility for WIC Clients only. This field is mandatory and cannot be edited.

NOTE: An income record that has the same begin date, number in economic unit value, and csf elderly selection is considered to be a duplicate record and cannot be saved.

- **Income High Weekly –** The maximum income allowed weekly for the Client for the corresponding family size. Defaults to zero. This field is mandatory and accepts a maximum of twenty two numeric characters.
- **Income High Biweekly –** The maximum income allowed Biweekly for the Client for the corresponding family size. Defaults to zero. This field is mandatory and accepts a maximum of twenty two numeric characters.
- **Income High Semimonthly –** The maximum income allowed semimonthly for the Client for the corresponding family size. Defaults to zero. This field is mandatory and accepts a maximum of twenty two numeric characters.
- **Income High Monthly –** The maximum income allowed monthly for the Client for the corresponding family size. Defaults to zero. This field is mandatory and accepts a maximum of twenty two numeric characters.
- **Income High Annual –** The maximum income allowed Annually for the Client for the corresponding family size. Defaults to zero. This field is mandatory and accepts a maximum of twenty two numeric characters.
- **Income Low –** The low income for the corresponding family size. This field is mandatory and accepts a maximum of twenty two numeric characters.

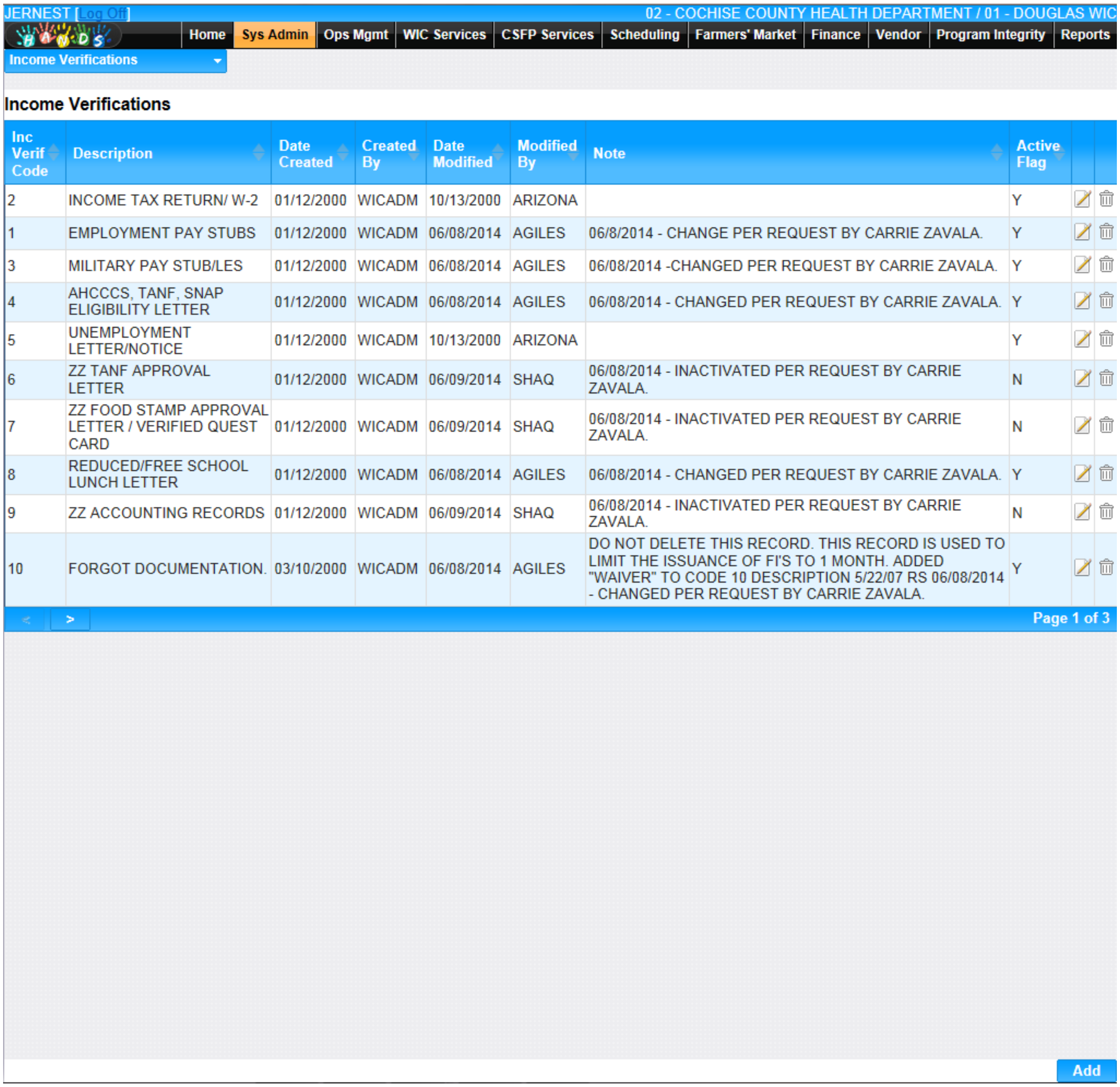
Calculations:

1) For information on income eligibility calculations, see the Income section of this document.

Background Processes: None

16.11 Income Verifications

Narrative: The purpose of this page is to add and maintain income verification records for the system. The income verification records displayed in the base table are used on the income page to populate the documentation drop down list.



Income Verifications

Inc Verif Code	Description	Date Created	Created By	Date Modified	Modified By	Note	Active Flag	
2	INCOME TAX RETURN/ W-2	01/12/2000	WICADM	10/13/2000	ARIZONA		Y	
1	EMPLOYMENT PAY STUBS	01/12/2000	WICADM	06/08/2014	AGILES	06/8/2014 - CHANGE PER REQUEST BY CARRIE ZAVALA.	Y	
3	MILITARY PAY STUB/LES	01/12/2000	WICADM	06/08/2014	AGILES	06/08/2014 -CHANGED PER REQUEST BY CARRIE ZAVALA.	Y	
4	AHCCCS, TANF, SNAP ELIGIBILITY LETTER	01/12/2000	WICADM	06/08/2014	AGILES	06/08/2014 - CHANGED PER REQUEST BY CARRIE ZAVALA.	Y	
5	UNEMPLOYMENT LETTER/NOTICE	01/12/2000	WICADM	10/13/2000	ARIZONA		Y	
6	ZZ TANF APPROVAL LETTER	01/12/2000	WICADM	06/09/2014	SHAQ	06/08/2014 - INACTIVATED PER REQUEST BY CARRIE ZAVALA.	N	
7	ZZ FOOD STAMP APPROVAL LETTER / VERIFIED QUEST CARD	01/12/2000	WICADM	06/09/2014	SHAQ	06/08/2014 - INACTIVATED PER REQUEST BY CARRIE ZAVALA.	N	
8	REDUCED/FREE SCHOOL LUNCH LETTER	01/12/2000	WICADM	06/08/2014	AGILES	06/08/2014 - CHANGED PER REQUEST BY CARRIE ZAVALA.	Y	
9	ZZ ACCOUNTING RECORDS	01/12/2000	WICADM	06/09/2014	SHAQ	06/08/2014 - INACTIVATED PER REQUEST BY CARRIE ZAVALA.	N	
10	FORGOT DOCUMENTATION.	03/10/2000	WICADM	06/08/2014	AGILES	DO NOT DELETE THIS RECORD. THIS RECORD IS USED TO LIMIT THE ISSUANCE OF FI'S TO 1 MONTH. ADDED "WAIVER" TO CODE 10 DESCRIPTION 5/22/07 RS 06/08/2014 - CHANGED PER REQUEST BY CARRIE ZAVALA.	Y	

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Figure 215: Income Verifications Base Table

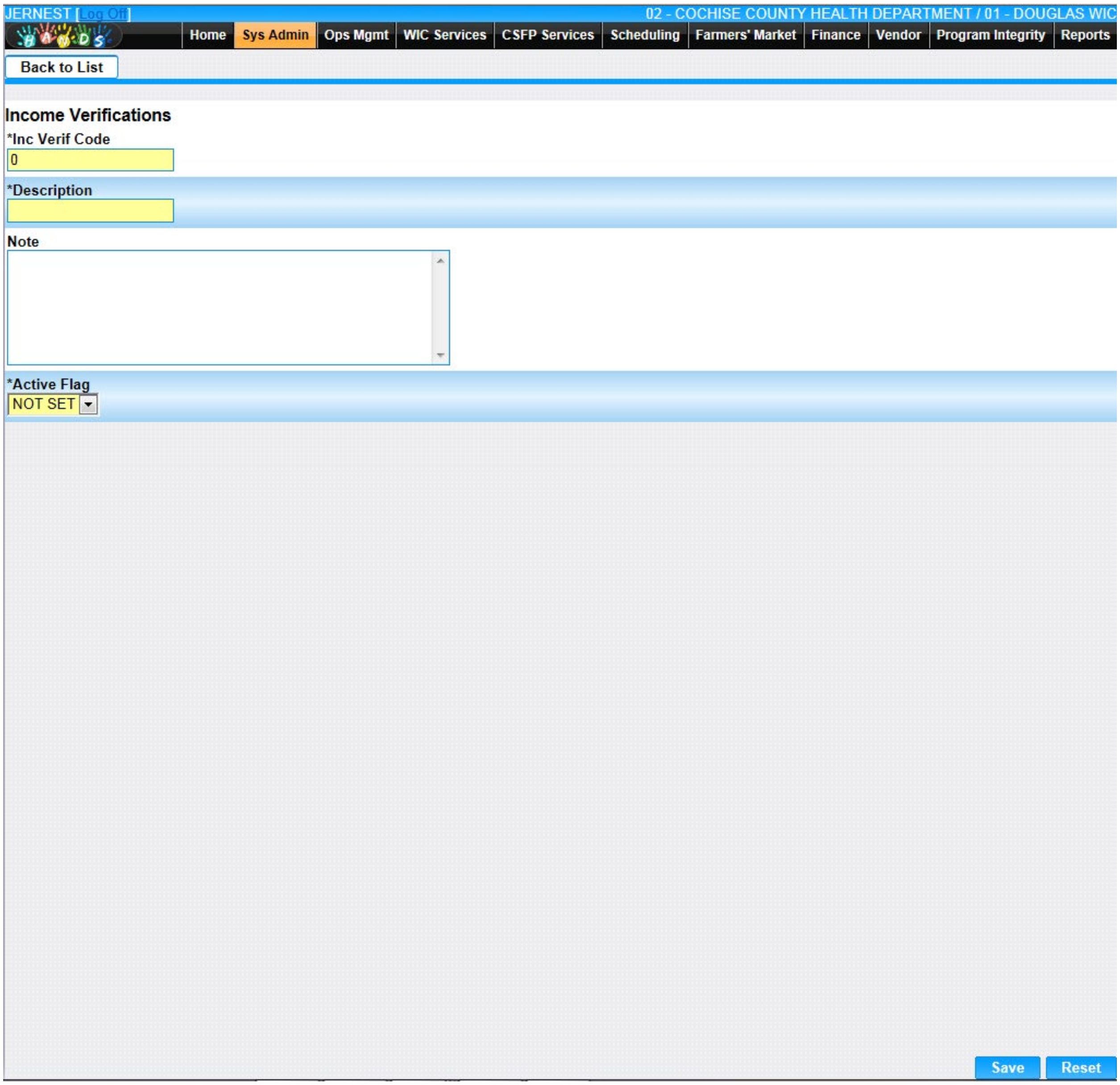


Figure 216: Add an Income Verification Record

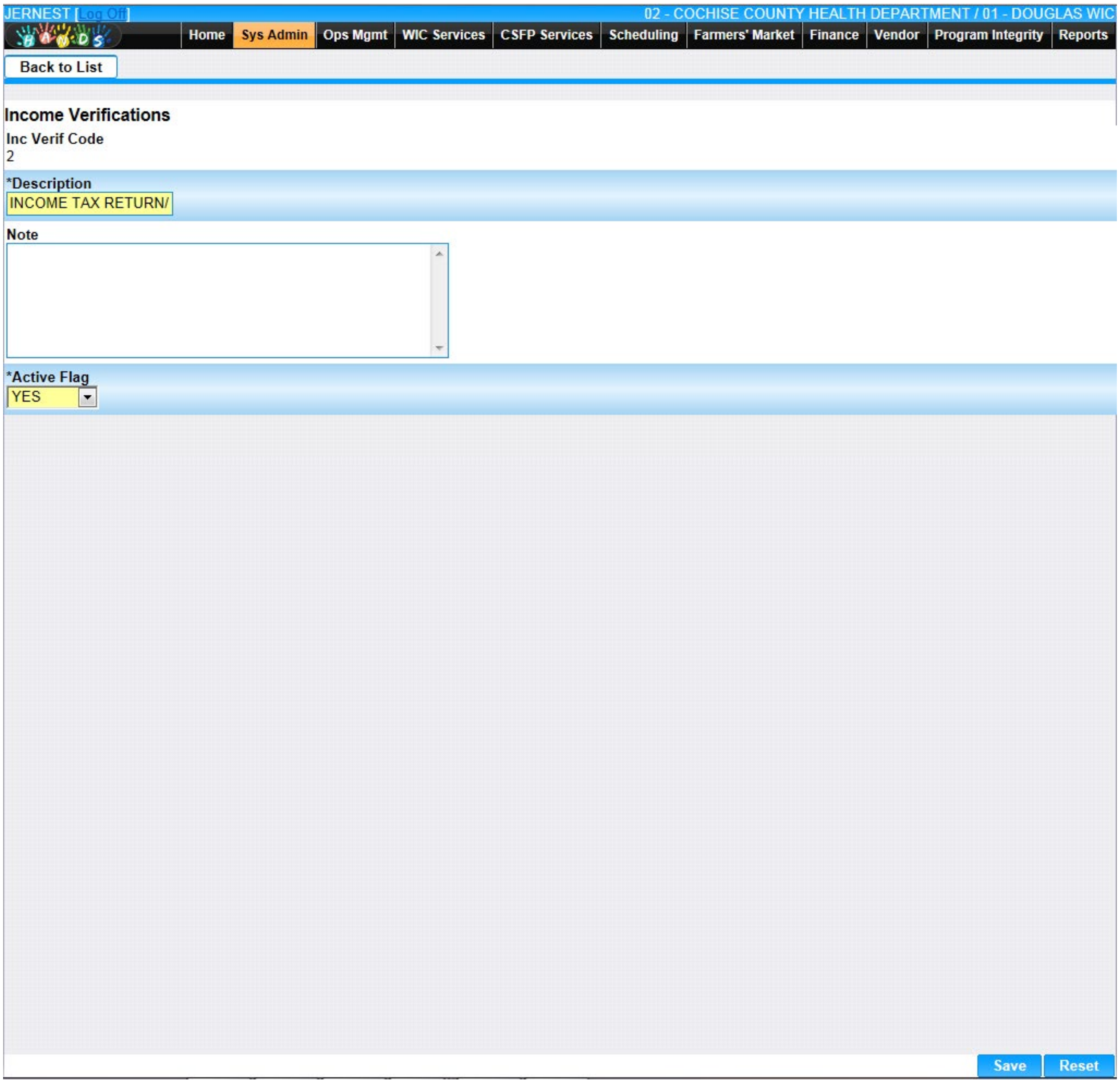


Figure 21731: Edit an Income Verification Record

Fields:

- **Inc Verif Code –** The unique user assigned code for the income verification record. This field is mandatory and accepts a max of ten numeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the income verification. This field is mandatory and accepts up to 60 alphanumeric / special characters.
- **Active Flag –** A drop down list to determine if the income verification record is active or not. If the Yes option is selected, then the income verification record will appear in the drop down list. If the No option is selected, then the income verification record will not appear in the drop down list. This field is mandatory.

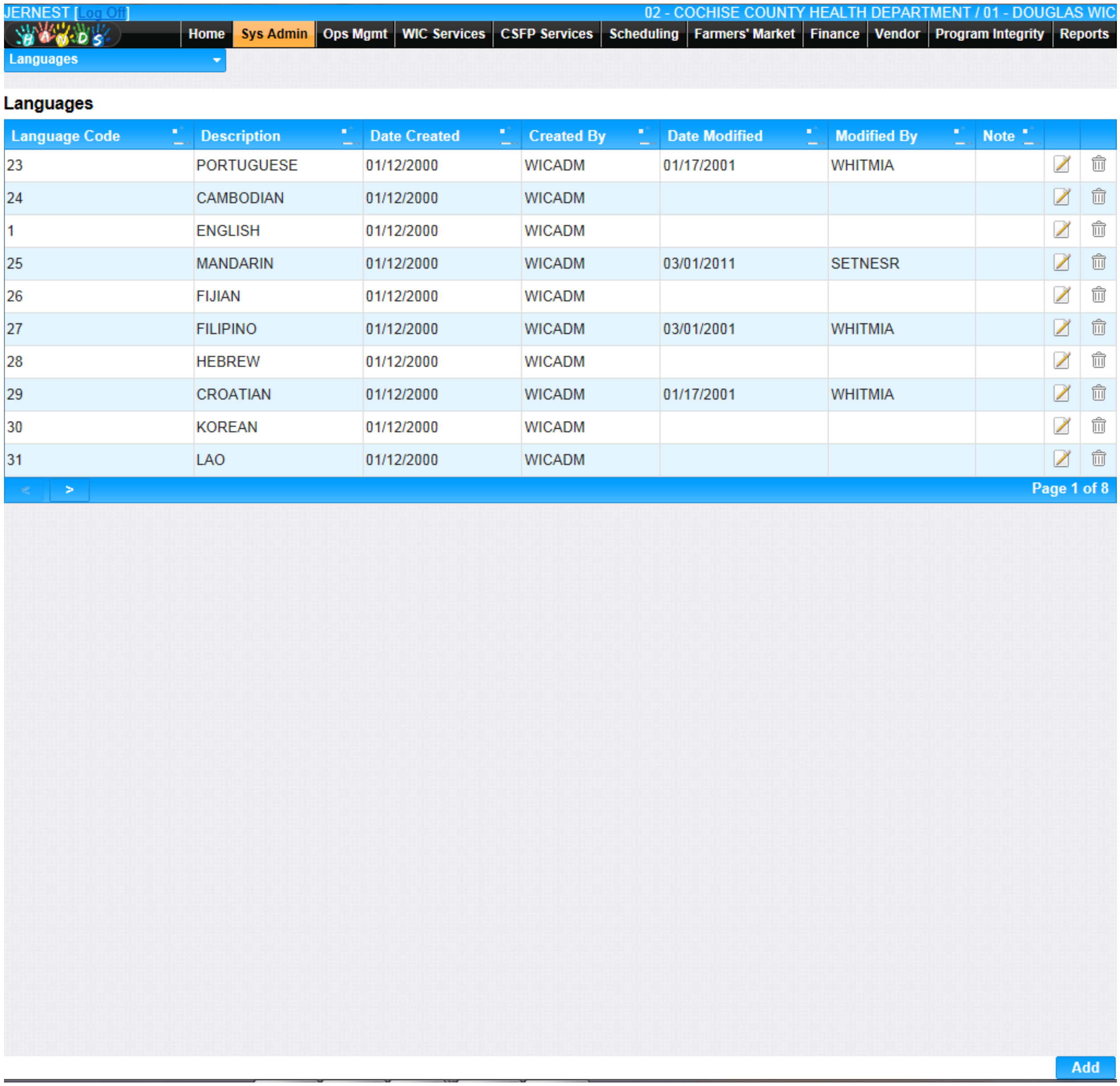
Calculations: None

Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple income verification records so that they have the same inc verif code.
2) The "10 – Forgot Documentation" income verification record is tied specifically to background processes that occur on the income and food package issuance pages. The system will not function correctly if this income verification record is not setup correctly. The forgot documentation logic is only applied to the specific clients it is applied to.
3) The "20 – No Proof Exists/Zero Income Signature Form" income verification record is tied specifically to background process that occur on the income and food package issuance pages. The system will not function correctly if this income verification record is not setup correctly.

16.12 Languages

Narrative:
The purpose of this page is to add and maintain language records for the system. The language records displayed in the base table are used on the Family information page to populate the language drop down list.



Language Code	Description	Date Created	Created By	Date Modified	Modified By	Note
23	PORTUGUESE	01/12/2000	WICADM	01/17/2001	WHITMIA	
24	CAMBODIAN	01/12/2000	WICADM			
1	ENGLISH	01/12/2000	WICADM			
25	MANDARIN	01/12/2000	WICADM	03/01/2011	SETNESR	
26	FIJIAN	01/12/2000	WICADM			
27	FILIPINO	01/12/2000	WICADM	03/01/2001	WHITMIA	
28	HEBREW	01/12/2000	WICADM			
29	CROATIAN	01/12/2000	WICADM	01/17/2001	WHITMIA	
30	KOREAN	01/12/2000	WICADM			
31	LAO	01/12/2000	WICADM			

Figure 232: Languages Base Table

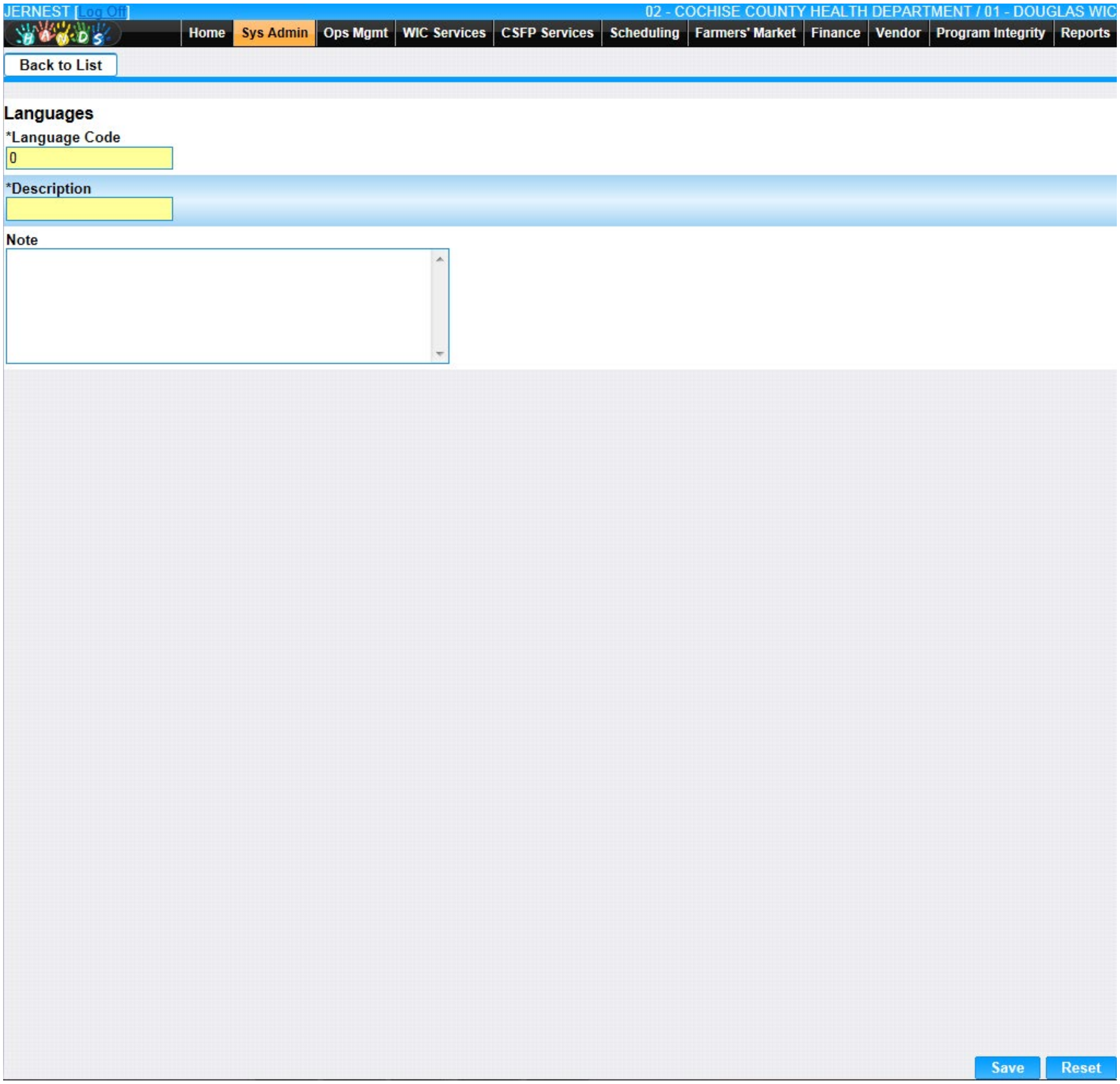


Figure 233: Add a Languages Record

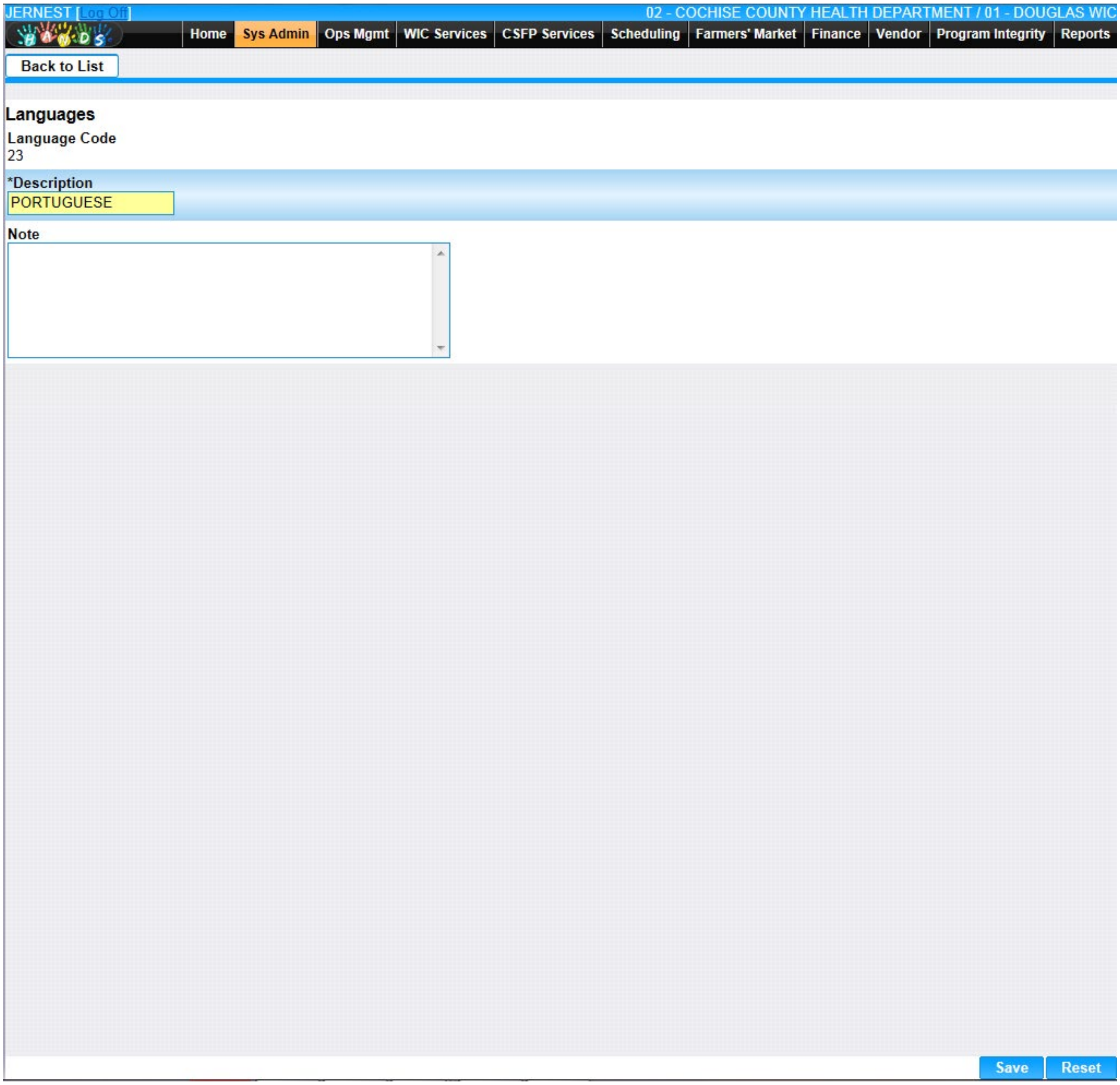


Figure 234: Edit a Languages Record

Fields:

- **Language Code –** The unique user assigned code for the language record. This field is mandatory and accepts a max of ten numeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the language. This field is mandatory and accepts up to 60 alphanumeric / special characters.

Calculations: None

Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple language records so that they have the same language code.

16.13 NCHS Classifications

Narrative:

The purpose of this page is to add and maintain NCHS classification records for the system. The NCHS classification records displayed in the base table are used in the NCHS type and NCHS data base tables to populate the NCHS classification drop down list for creating new records.

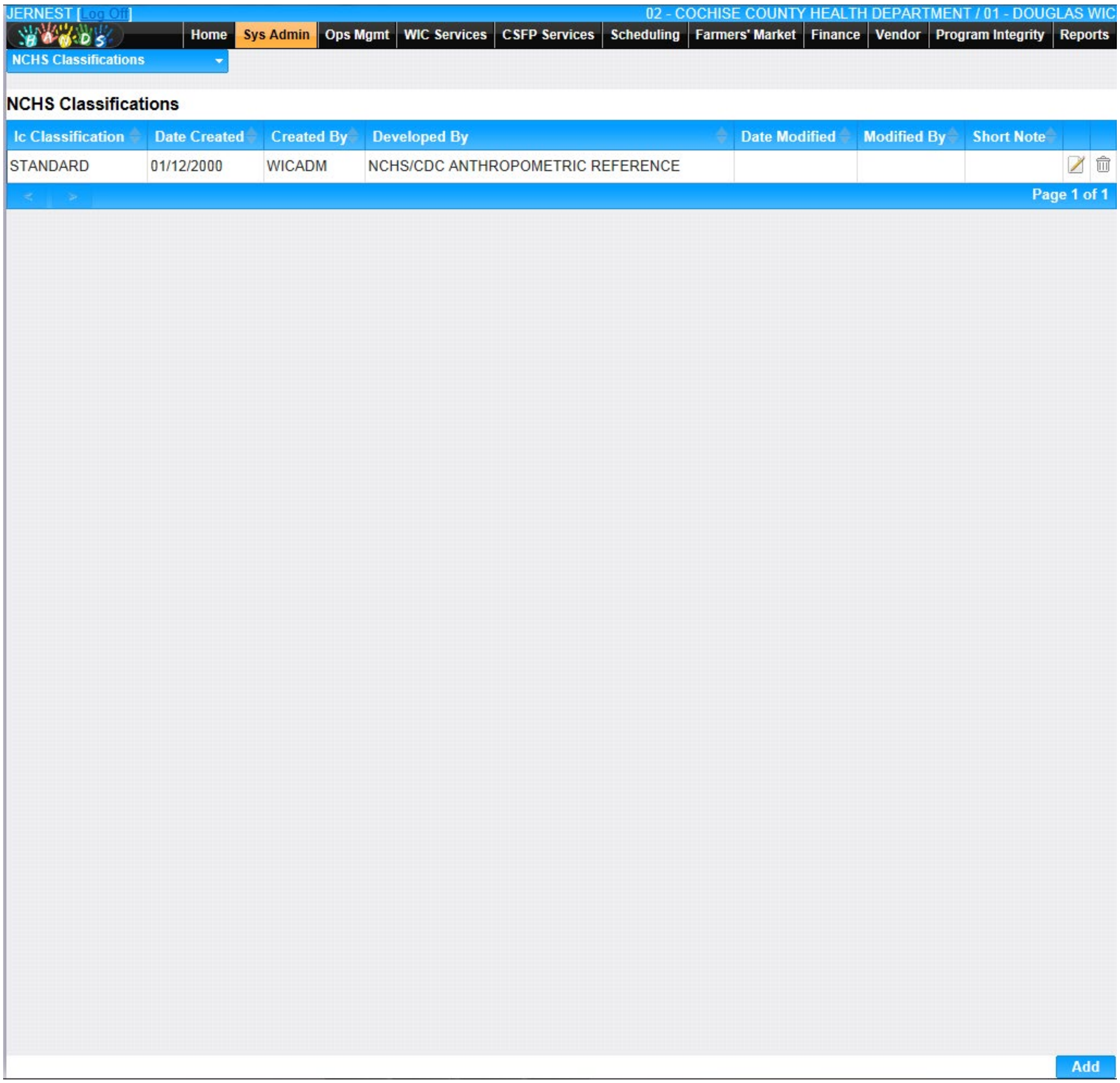


Figure 235: NCHS Classifications Base Table

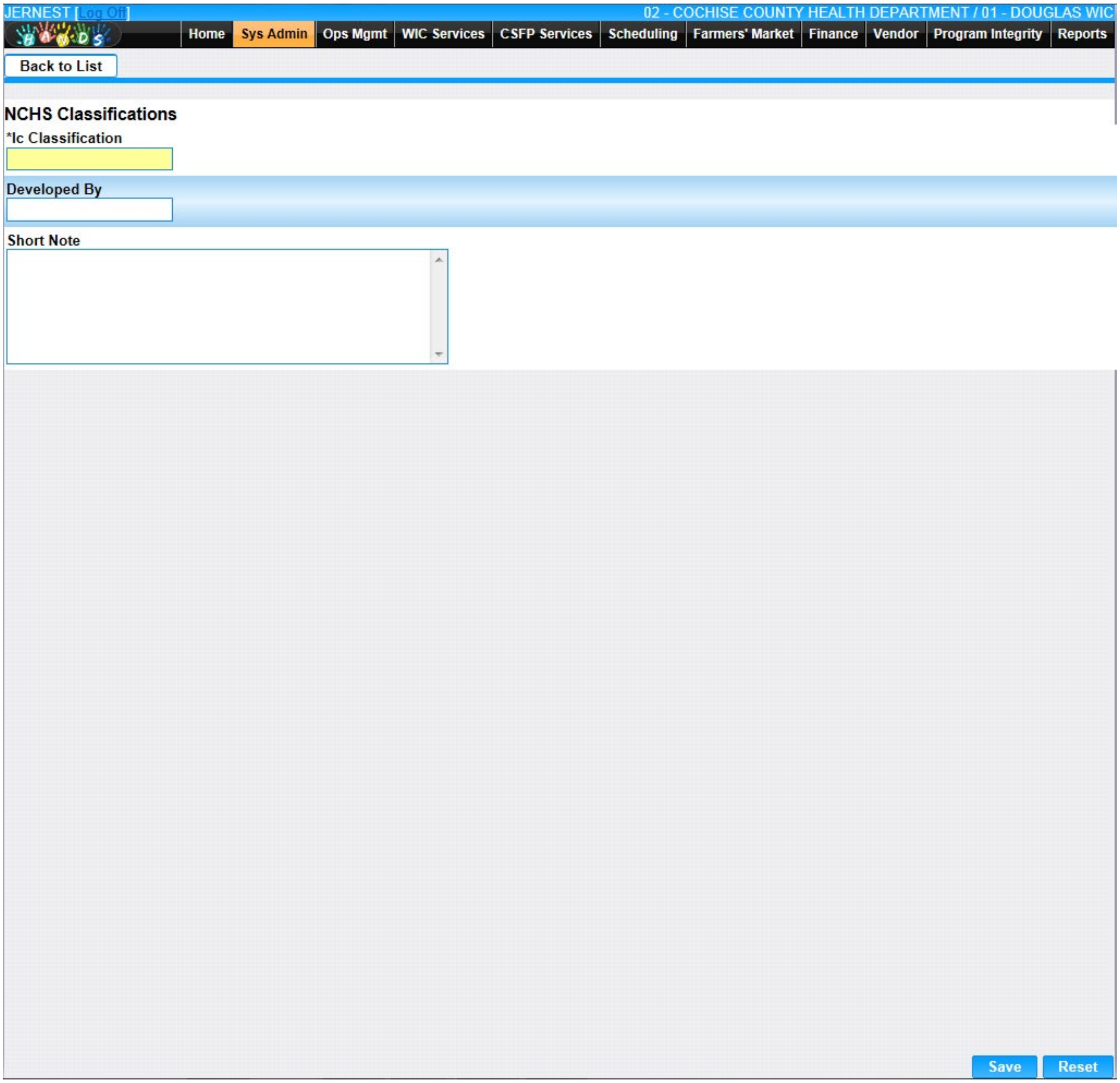


Figure 218: Add an NCHS Classification Record

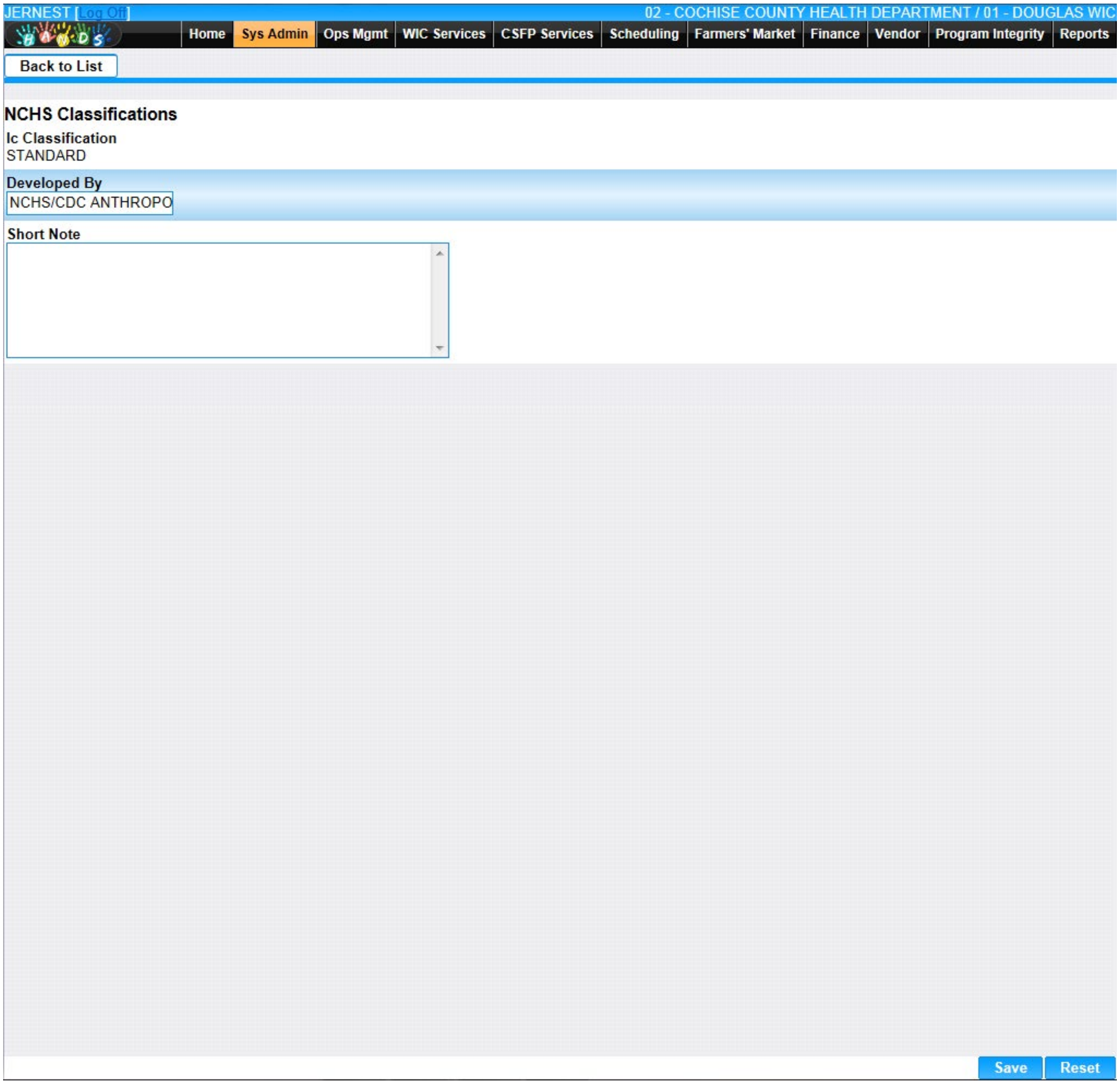


Figure 219: Edit an NCHS Classification Record

Fields:

- **Ic Classification –** The unique user assigned description for the NCHS classification record. This field is mandatory and accepts a max of eight alphanumeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Developed By –** The name of the developer of the NCHS type. This field is optional and accepts a maximum of 60 alphanumeric / special characters.
- **Short Note –** A free form text field that is displayed to provide additional information about the NCHS classification. This field is optional and accepts a maximum of 200 alphanumeric / special characters.

Calculations: None

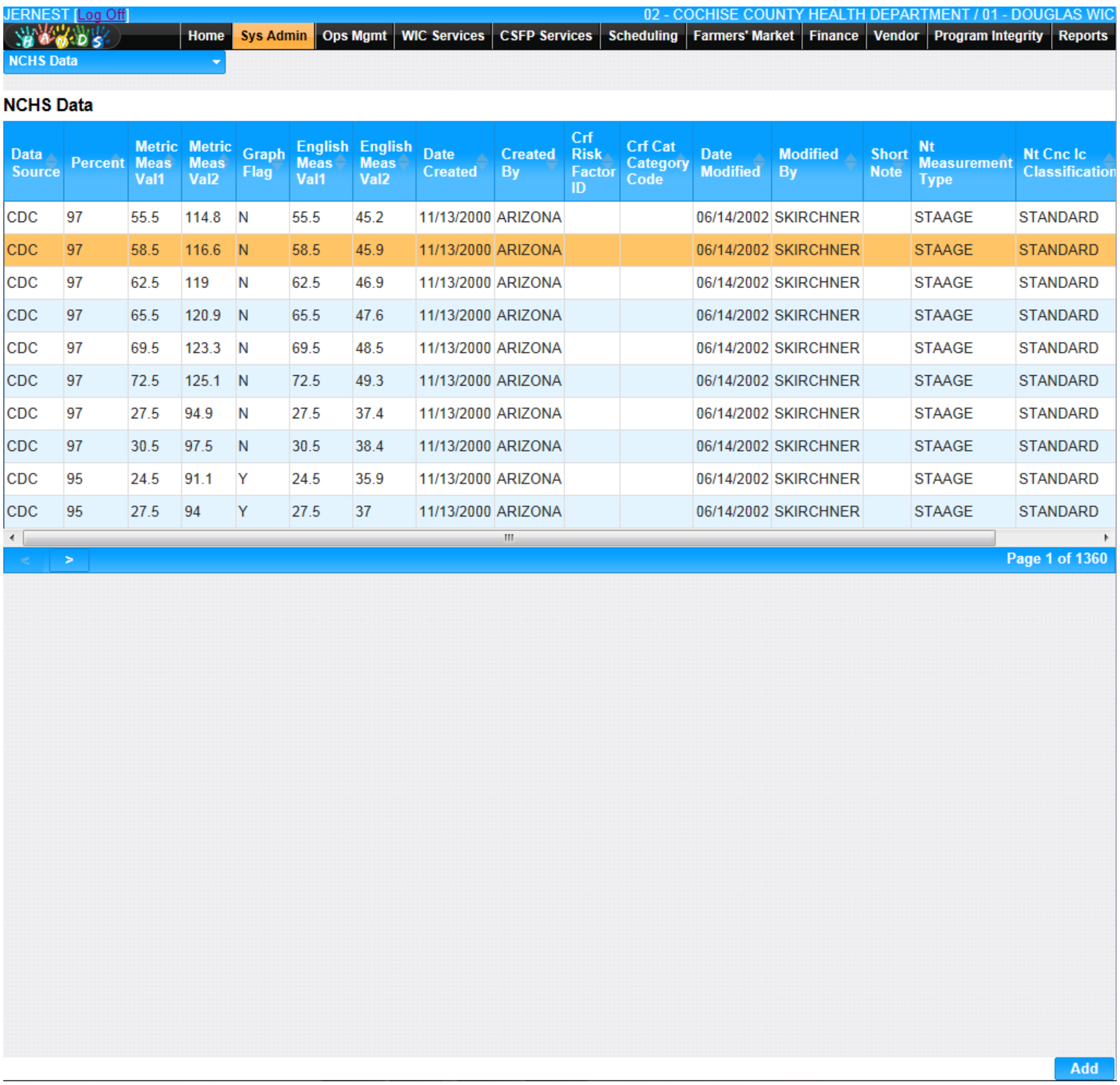
Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple NCHS classification records so that they have the same ic classification description.

16.14 NCHS Data

Narrative:

The purpose of this page is to add and maintain NCHS data records for the system. The NCHS data records are used on the Client medical and medical graph pages. Records in the NCHS data base table are used to populate the percentile lines on graphs along with the creation of the graphs X and Y-axis. The NCHS data records are also used in the calculation of the percent columns (ex] LGT/Age %) in the anthropometric data grid.



Data Source	Percent	Metric Meas Val1	Metric Meas Val2	Graph Flag	English Meas Val1	English Meas Val2	Date Created	Created By	Crf Risk Factor ID	Crf Cat Category Code	Date Modified	Modified By	Short Note	Nt Measurement Type	Nt Cnc Ic Classification
CDC	97	55.5	114.8	N	55.5	45.2	11/13/2000	ARIZONA			06/14/2002	SKIRCHNER		STAAGE	STANDARD
CDC	97	58.5	116.6	N	58.5	45.9	11/13/2000	ARIZONA			06/14/2002	SKIRCHNER		STAAGE	STANDARD
CDC	97	62.5	119	N	62.5	46.9	11/13/2000	ARIZONA			06/14/2002	SKIRCHNER		STAAGE	STANDARD
CDC	97	65.5	120.9	N	65.5	47.6	11/13/2000	ARIZONA			06/14/2002	SKIRCHNER		STAAGE	STANDARD
CDC	97	69.5	123.3	N	69.5	48.5	11/13/2000	ARIZONA			06/14/2002	SKIRCHNER		STAAGE	STANDARD
CDC	97	72.5	125.1	N	72.5	49.3	11/13/2000	ARIZONA			06/14/2002	SKIRCHNER		STAAGE	STANDARD
CDC	97	27.5	94.9	N	27.5	37.4	11/13/2000	ARIZONA			06/14/2002	SKIRCHNER		STAAGE	STANDARD
CDC	97	30.5	97.5	N	30.5	38.4	11/13/2000	ARIZONA			06/14/2002	SKIRCHNER		STAAGE	STANDARD
CDC	95	24.5	91.1	Y	24.5	35.9	11/13/2000	ARIZONA			06/14/2002	SKIRCHNER		STAAGE	STANDARD
CDC	95	27.5	94	Y	27.5	37	11/13/2000	ARIZONA			06/14/2002	SKIRCHNER		STAAGE	STANDARD

Figure 220: NCHS Data Base Table

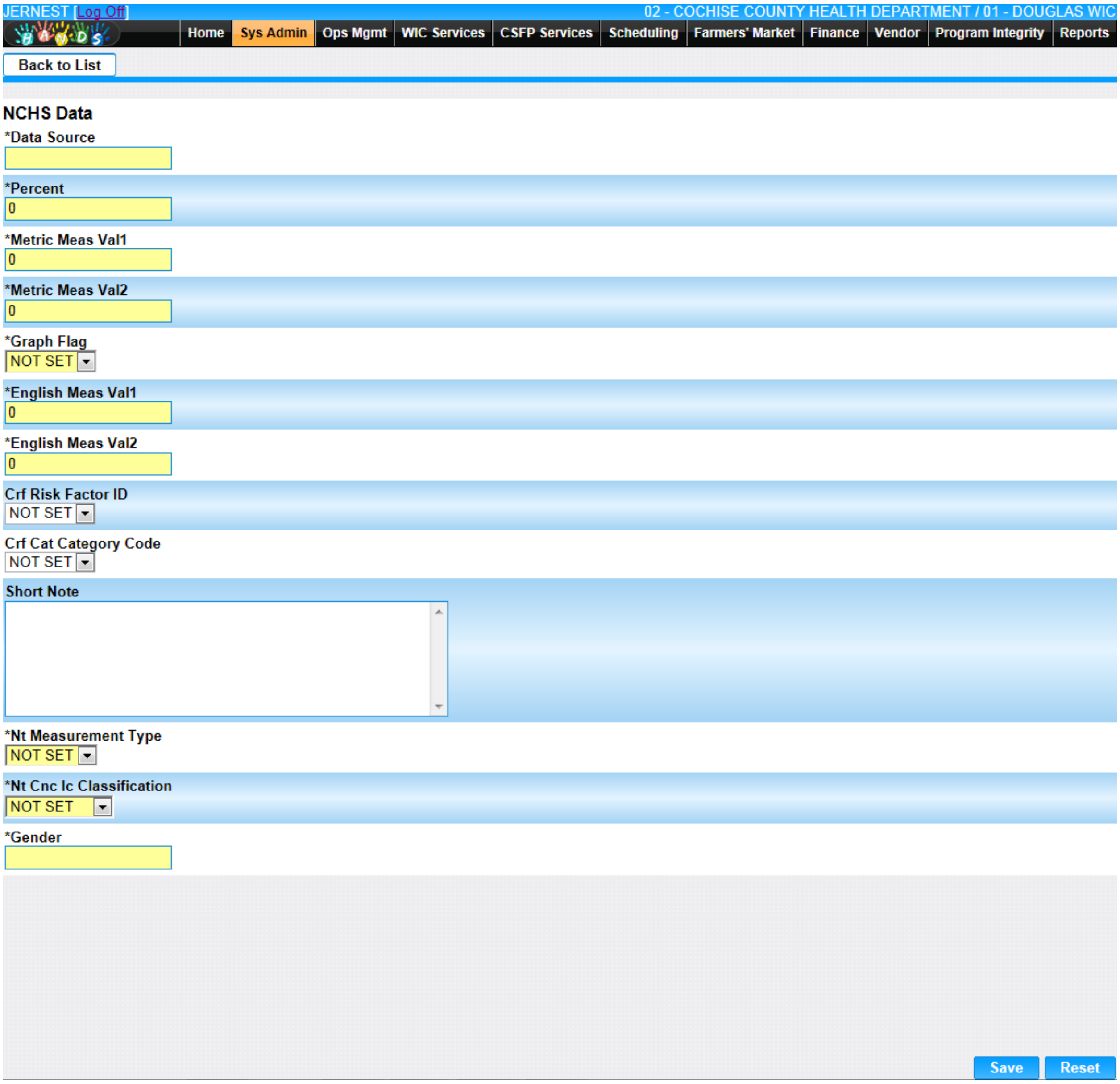


Figure 221: Add an NCHS Data Record

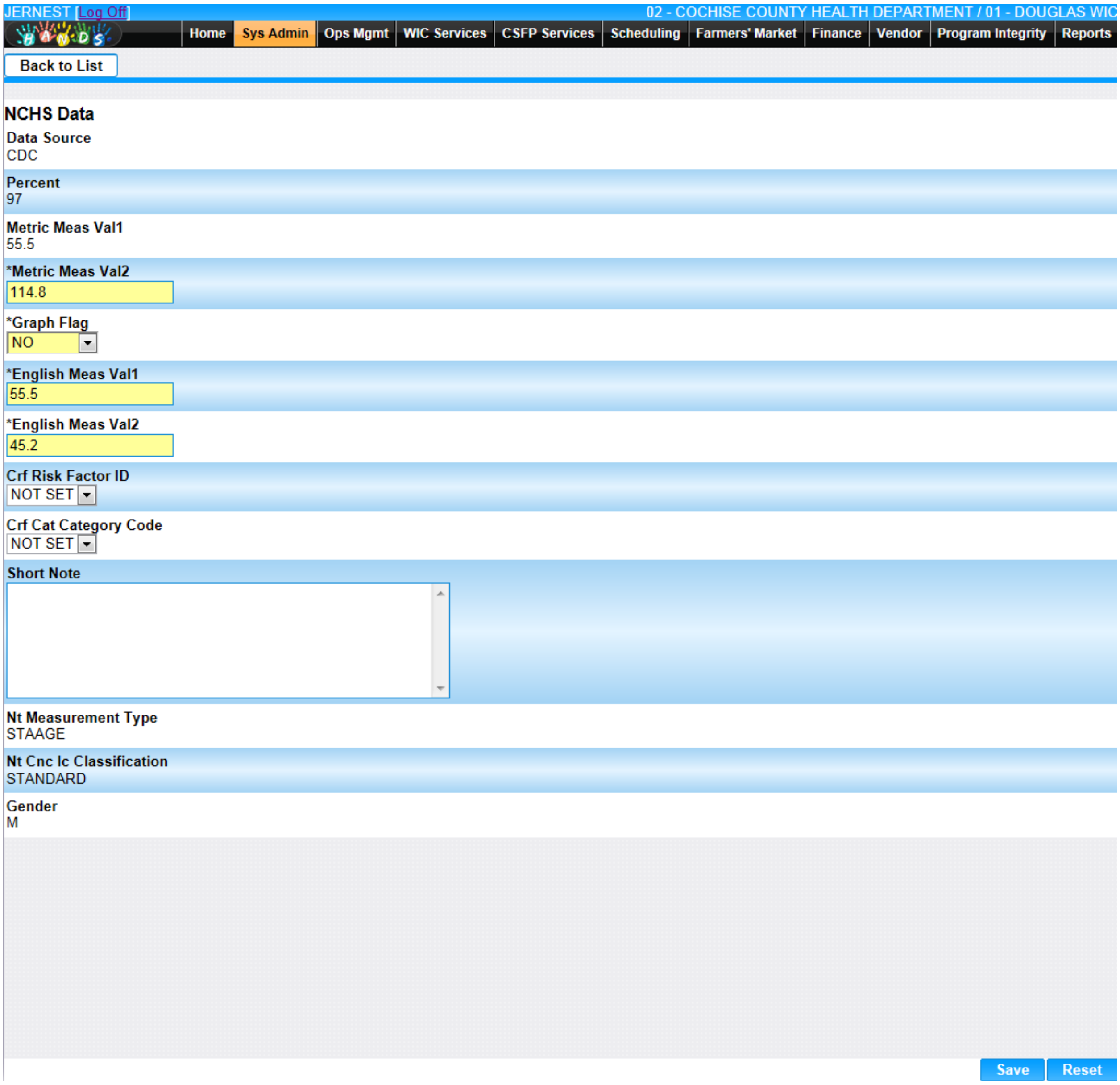


Figure 240: Edit an NCHS Data Record

Fields:

- **Data Source –** The data source of the NCHS data record. This field is mandatory and accepts a maximum of 3 alphanumeric / special characters. This field cannot be edited after the record has been saved.
- **Percent –** The NCHS percentile for the NCHS data record. This field is mandatory and accepts a maximum of 3 numeric characters followed by two decimal points. This field cannot be edited after the record has been saved.
- **Metric Meas Val1 –** The Metric value for the first measurement for the NCHS data record. This field is mandatory and accepts a maximum of 6 numeric characters followed by 8 decimal points. This field cannot be edited after the record has been saved.

- **Metric Meas Val2 –** The Metric value for the second measurement for the NCHS data record. This field is mandatory and accepts a maximum of 6 numeric characters followed by 8 decimal points.
- **Graph Flag –** A drop down list used to determine if the NCHS data record will be used on the Client medical graphs. If the Yes option is selected then the NCHS data record will be used on the Client medical graphs. If the No option is selected then the NCHS data record will not be used on the Client medical graphs. This field is mandatory.
- **English Meas Val1 –** The English value for the first measurement for the NCHS data record. This field is mandatory and accepts a maximum of 6 numeric characters followed by 8 decimal points. This field cannot be edited after the record has been saved.
- **English Meas Val2 –** The English value for the second measurement for the NCHS data record. This field is mandatory and accepts a maximum of 6 numeric characters followed by 8 decimal points.
- **Crf Risk Factor ID –** A drop down list used to determine if the NCHS data record should assign a WIC Code to a Client. Options in the drop down list are populated based on data populated in the risk factors base table. This field is optional.
  NOTE: The WIC Code associated with the NCHS data record will only be assigned to a Client if the entered medical data for the Client is calculated to select the associated row in the NCHS data base table.
- **Crf Cat Category Code –** A drop down list used to determine the category code for the risk factor selected for the NCHS data record. Options in the drop down list are populated based on data populated in the categories base table. This field is optional.
- **Short Note –** A free form text field that is displayed to provide additional information about the NCHS data record. This field is optional and accepts a maximum of 200 alphanumeric / special characters.
- **Nt Measurement Type –** The NCHS Measurement Type for the NCHS data record. This field is mandatory and selected from a drop down list. Options in the drop down list are populated based on populated data in the NCHS Type base table. This field cannot be edited after the record has been saved.
- **Nt Cnc Ic Classification –** The NCHS classification for the NCHS data record. This field is mandatory and selected from a drop down list. Options in the drop down list are populated based on populated data in the NCHS classification base table. This field cannot be edited after the record has been saved.
- **Gender –** The gender of the Client. This field is mandatory and accepts either M or F. This field cannot be edited after the record has been saved.

Calculations: None

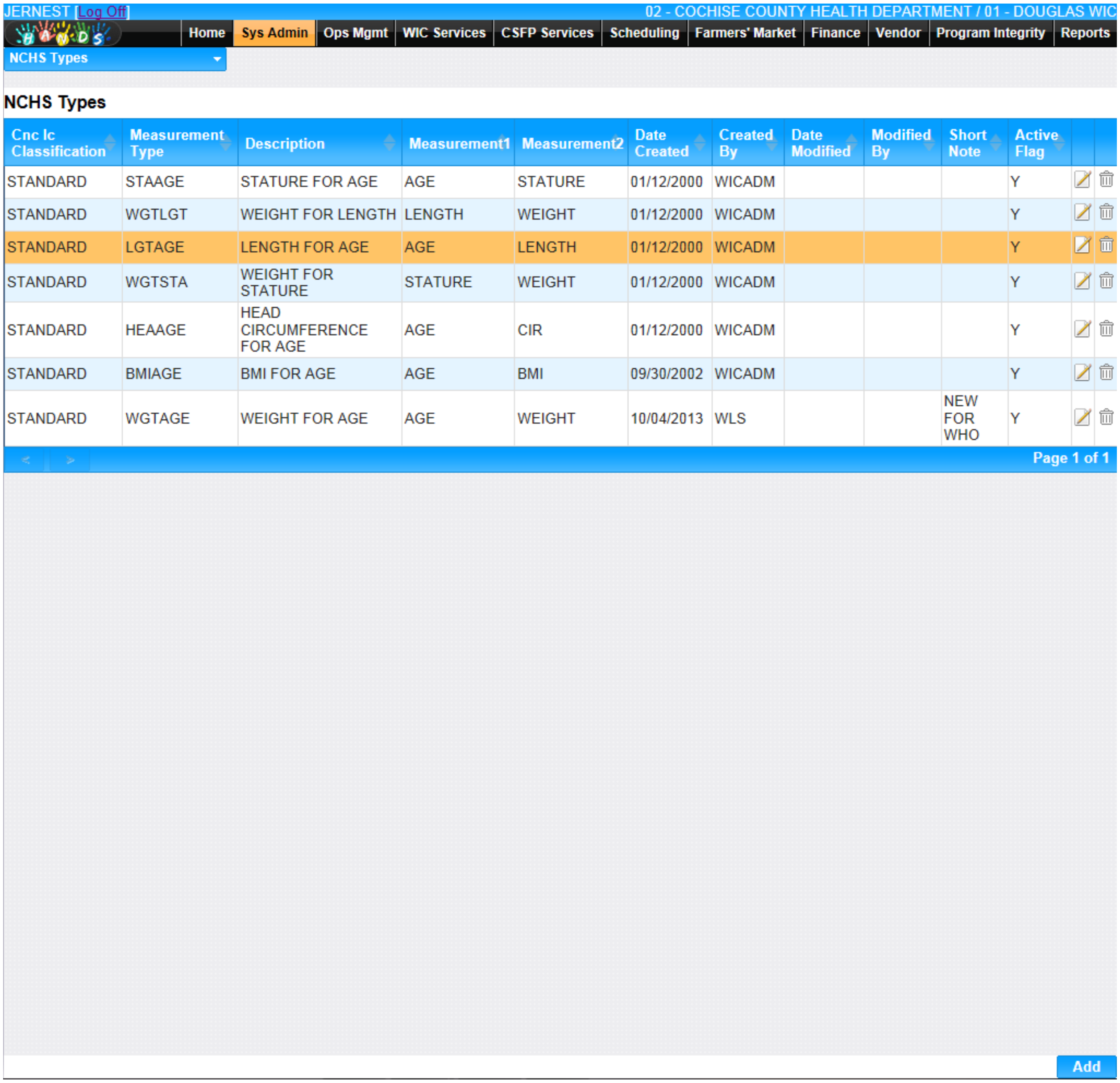
Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple NCHS data records so that they have the same nt measurement type, nt cnc ic classification, percent, gender, and metric meas val1.

16.15 NCHS Types

Narrative:

The purpose of this page is to add and maintain NCHS type records for the system. The NCHS type records displayed in the base table are used in the NCHS data base table to populate the NCHS type field for NCHS data records.



Cnc Ic Classification	Measurement Type	Description	Measurement1	Measurement2	Date Created	Created By	Date Modified	Modified By	Short Note	Active Flag
STANDARD	STAAGE	STATURE FOR AGE	AGE	STATURE	01/12/2000	WICADM				Y
STANDARD	WGTLGT	WEIGHT FOR LENGTH	LENGTH	WEIGHT	01/12/2000	WICADM				Y
STANDARD	LGTAGE	LENGTH FOR AGE	AGE	LENGTH	01/12/2000	WICADM				Y
STANDARD	WGTSTA	WEIGHT FOR STATURE	STATURE	WEIGHT	01/12/2000	WICADM				Y
STANDARD	HEAAGE	HEAD CIRCUMFERENCE FOR AGE	AGE	CIR	01/12/2000	WICADM				Y
STANDARD	BMIAGE	BMI FOR AGE	AGE	BMI	09/30/2002	WICADM				Y
STANDARD	WGTAGE	WEIGHT FOR AGE	AGE	WEIGHT	10/04/2013	WLS			NEW FOR WHO	Y

Figure 222: NCHS Types Base Table

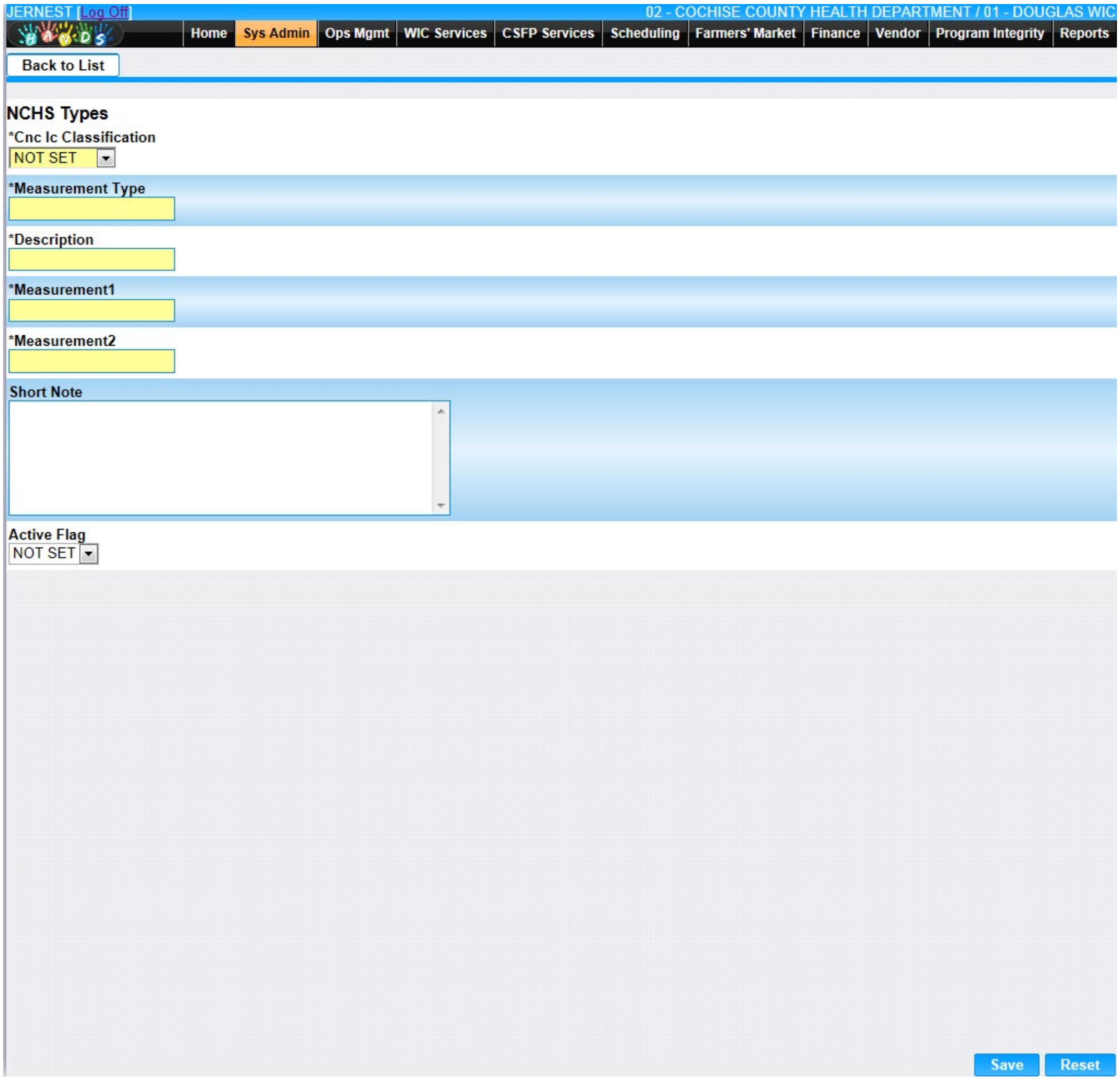


Figure 223: Add an NCHS Type Record

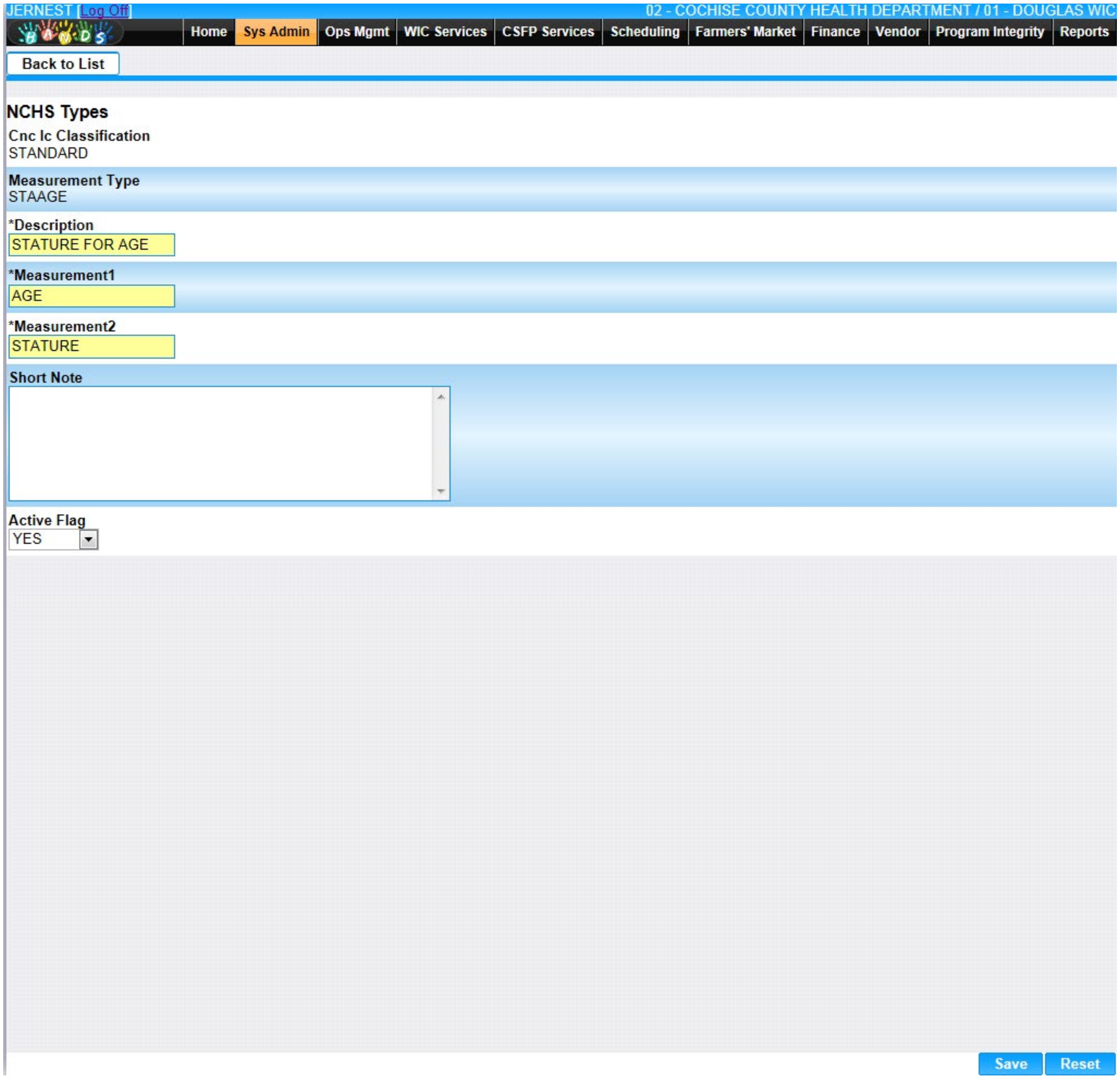


Figure 224: Edit an NCHS Type Record

Fields:

- **Cnc Ic Classification –** The NCHS classification for the NCHS type record. This field is mandatory and selected from a drop down list. Options in the drop down list are populated based on data populated in the NCHS classification base table. This field cannot be edited once the record has been saved.
- **Measurement Type –** The type of measurement for NCHS data. This field is mandatory and accepts a maximum of six alphanumeric / special characters. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to provide additional information about the measurement type. This field is mandatory and accepts a maximum of 60 alphanumeric / special characters.

- **Measurement 1 –** A free form text field for a user to add a short description of the first measurement to be entered. This field is mandatory and accepts a maximum of ten alphanumeric / special characters.
- **Measurement 2 –** A free form text field for the user to add a short description about the second measurement to be entered. This field is mandatory and accepts a maximum of ten alphanumeric / special characters.
- **Short Note –** A free form text field that is displayed to provide additional information about the NCHS type. This field is optional and accepts a maximum of 200 alphanumeric / special characters.
- **Active Flag –** A drop down list to determine if the NCHS type record is active or not. If the Yes option is selected, then the NCHS type record is active. If the No option is selected, then the NCHS type record is not active. This field is optional.

Calculations: None

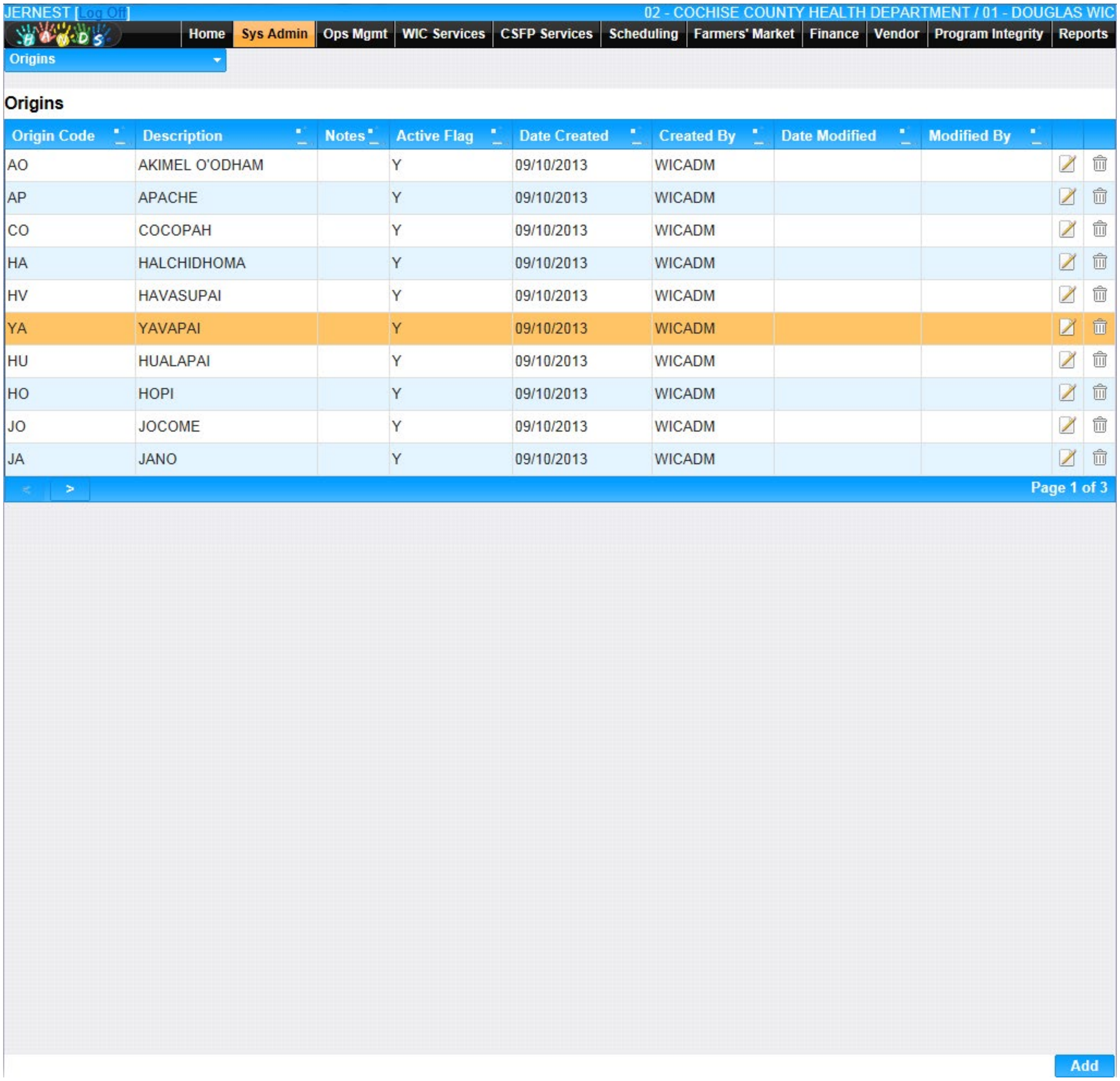
Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple NCHS type records so that they have the same NCHS classification and measurement type.

16.16 Origins

Narrative:

The purpose of this page is to add and maintain origin records for the system. The origin records displayed in the base table are used on the Family information page to populate the Origin drop down list. The origin drop down list will only display on the Family Information page if the State Agency has the setting enabled on the State configuration settings page. For more information, see the State Configuration Settings section of the System Administration DFDD.



Origin Code	Description	Notes	Active Flag	Date Created	Created By	Date Modified	Modified By
AO	AKIMEL O'ODHAM		Y	09/10/2013	WICADM		
AP	APACHE		Y	09/10/2013	WICADM		
CO	COCOPAH		Y	09/10/2013	WICADM		
HA	HALCHIDHOMA		Y	09/10/2013	WICADM		
HV	HAVASUPAI		Y	09/10/2013	WICADM		
YA	YAVAPAI		Y	09/10/2013	WICADM		
HU	HUALAPAI		Y	09/10/2013	WICADM		
HO	HOPI		Y	09/10/2013	WICADM		
JO	JOCOME		Y	09/10/2013	WICADM		
JA	JANO		Y	09/10/2013	WICADM		

Figure 225: Origins Base Table

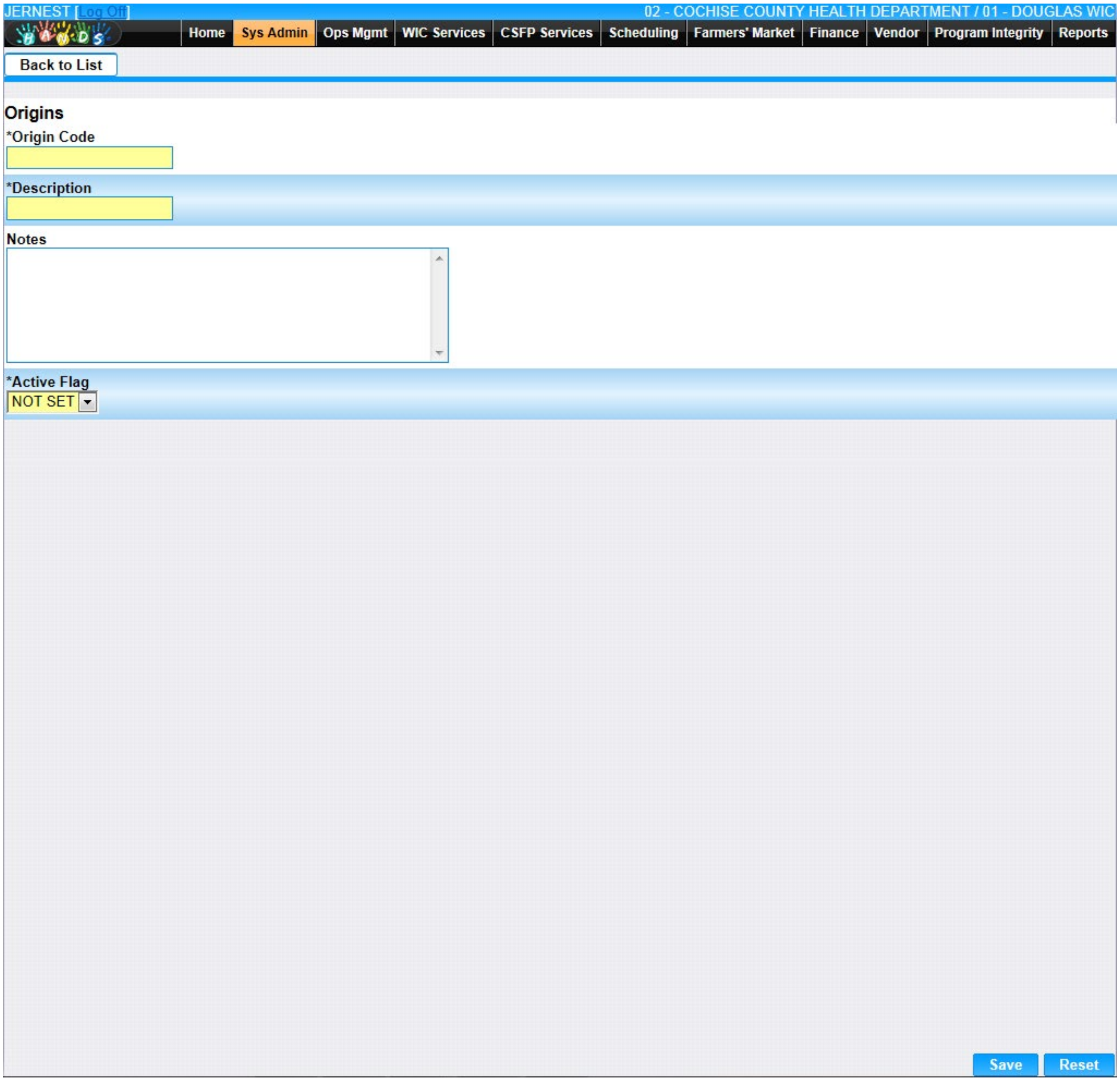


Figure 226: Add an Origin Record

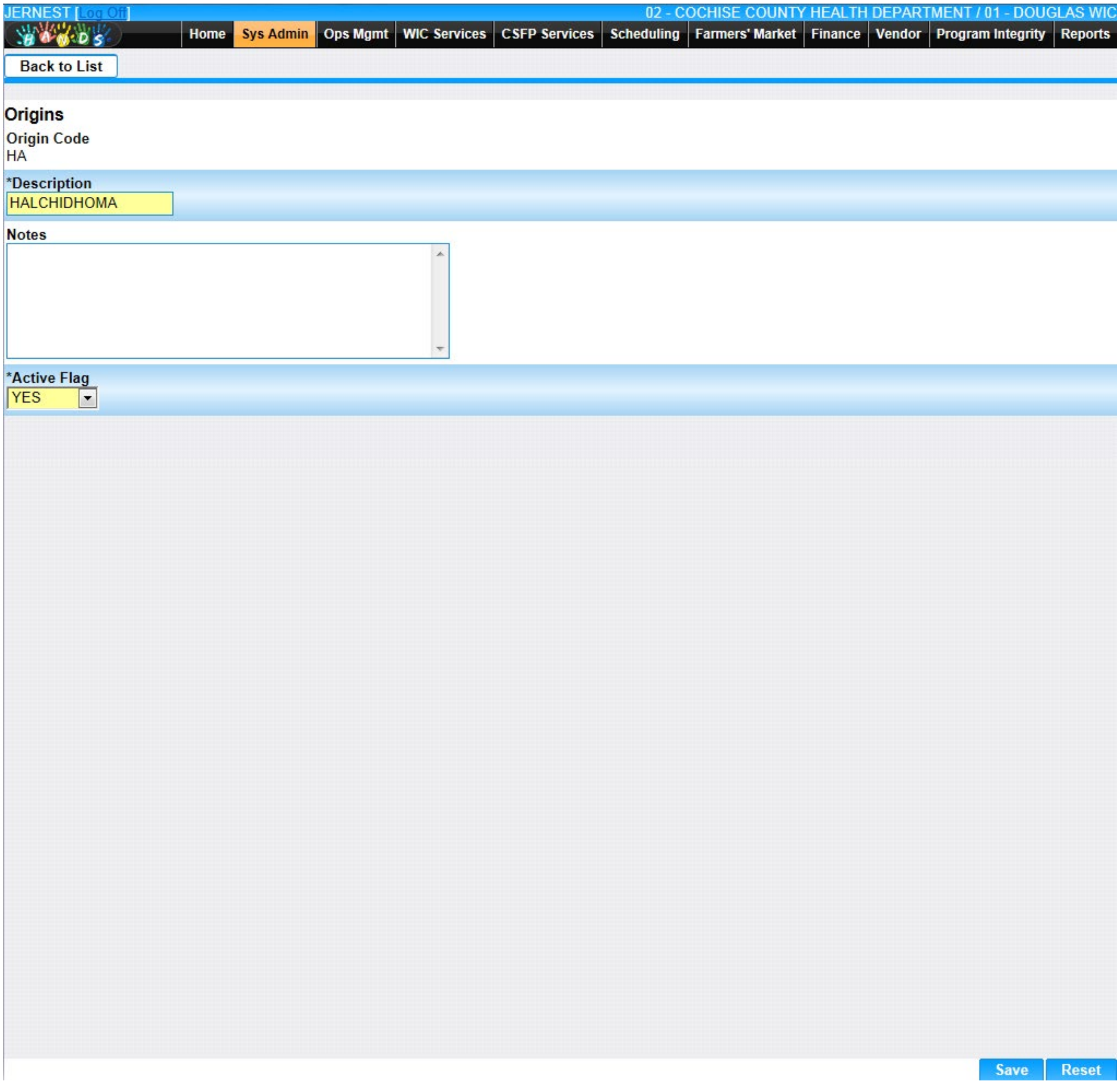


Figure 227: Edit an Origin Record

Fields:

- **Origin Code –** The unique user assigned code for the origin record. This field is mandatory and accepts a max of two alphanumeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the origin. This field is mandatory and accepts up to 60 alphanumeric / special characters.
- **Active Flag –** A drop down list to determine if the origin record is active or not. If the Yes option is selected, then the origin record will appear in the drop down list. If the No option is selected, then the origin record will not appear in the drop down list. This field is mandatory.

Calculations: None

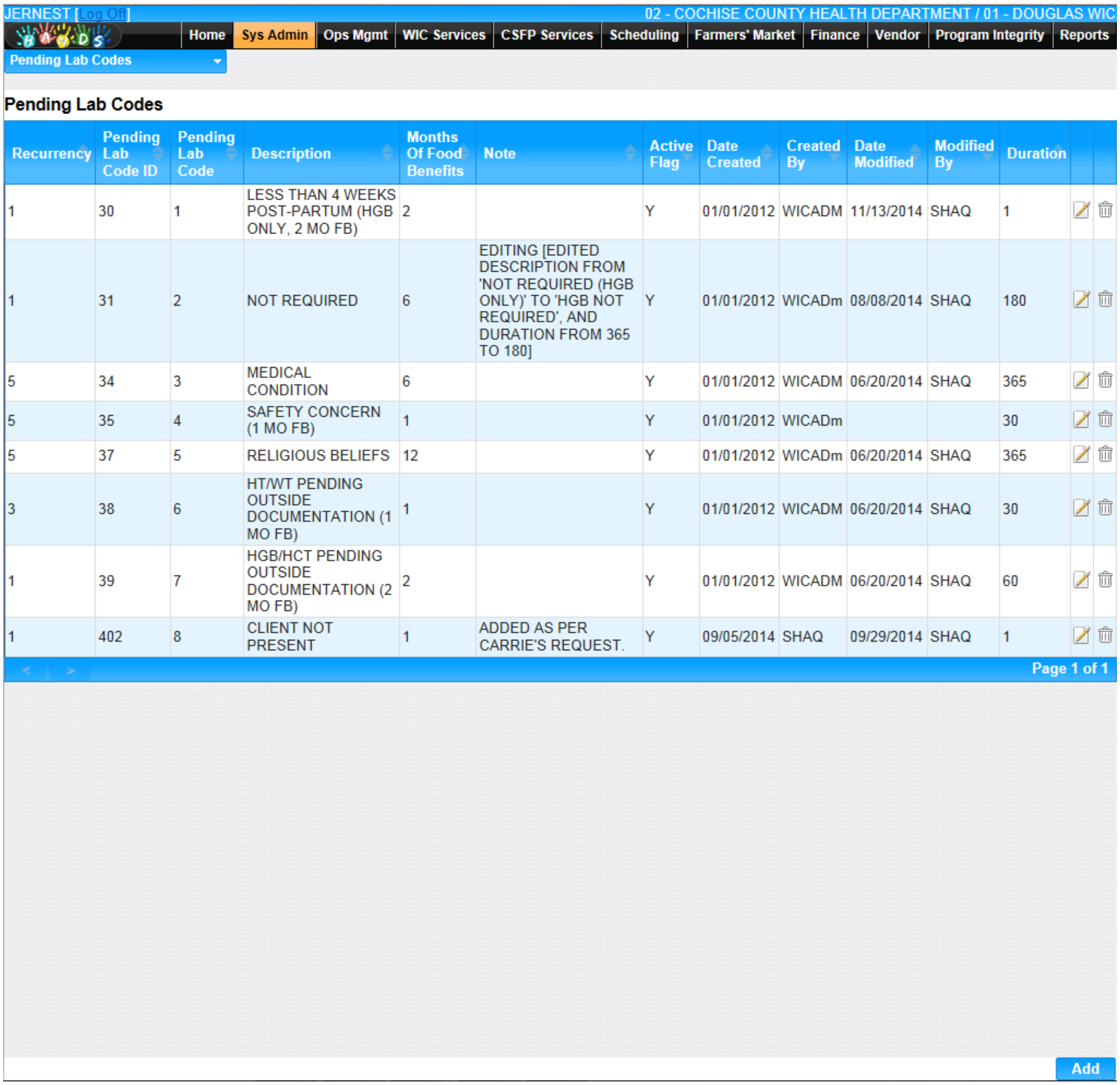
Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple origin records so that they have the same origin code.

16.17 Pending Lab Codes

Narrative:

The purpose of this page is to add and maintain pending lab code records for the system. The pending lab code records displayed in the base table are used on the Medical page to populate the pending lab code drop down lists for adding anthropometric and blood work records.



Recurrency	Pending Lab Code ID	Pending Lab Code	Description	Months Of Food Benefits	Note	Active Flag	Date Created	Created By	Date Modified	Modified By	Duration
1	30	1	LESS THAN 4 WEEKS POST-PARTUM (HGB ONLY, 2 MO FB)	2		Y	01/01/2012	WICADM	11/13/2014	SHAQ	1
1	31	2	NOT REQUIRED	6	EDITING [EDITED DESCRIPTION FROM 'NOT REQUIRED (HGB ONLY)' TO 'HGB NOT REQUIRED', AND DURATION FROM 365 TO 180]	Y	01/01/2012	WICADm	08/08/2014	SHAQ	180
5	34	3	MEDICAL CONDITION	6		Y	01/01/2012	WICADM	06/20/2014	SHAQ	365
5	35	4	SAFETY CONCERN (1 MO FB)	1		Y	01/01/2012	WICADm			30
5	37	5	RELIGIOUS BELIEFS	12		Y	01/01/2012	WICADm	06/20/2014	SHAQ	365
3	38	6	HT/WT PENDING OUTSIDE DOCUMENTATION (1 MO FB)	1		Y	01/01/2012	WICADM	06/20/2014	SHAQ	30
1	39	7	HGB/HCT PENDING OUTSIDE DOCUMENTATION (2 MO FB)	2		Y	01/01/2012	WICADM	06/20/2014	SHAQ	60
1	402	8	CLIENT NOT PRESENT	1	ADDED AS PER CARRIE'S REQUEST.	Y	09/05/2014	SHAQ	09/29/2014	SHAQ	1

Figure 228: Pending Lab Codes Base Table

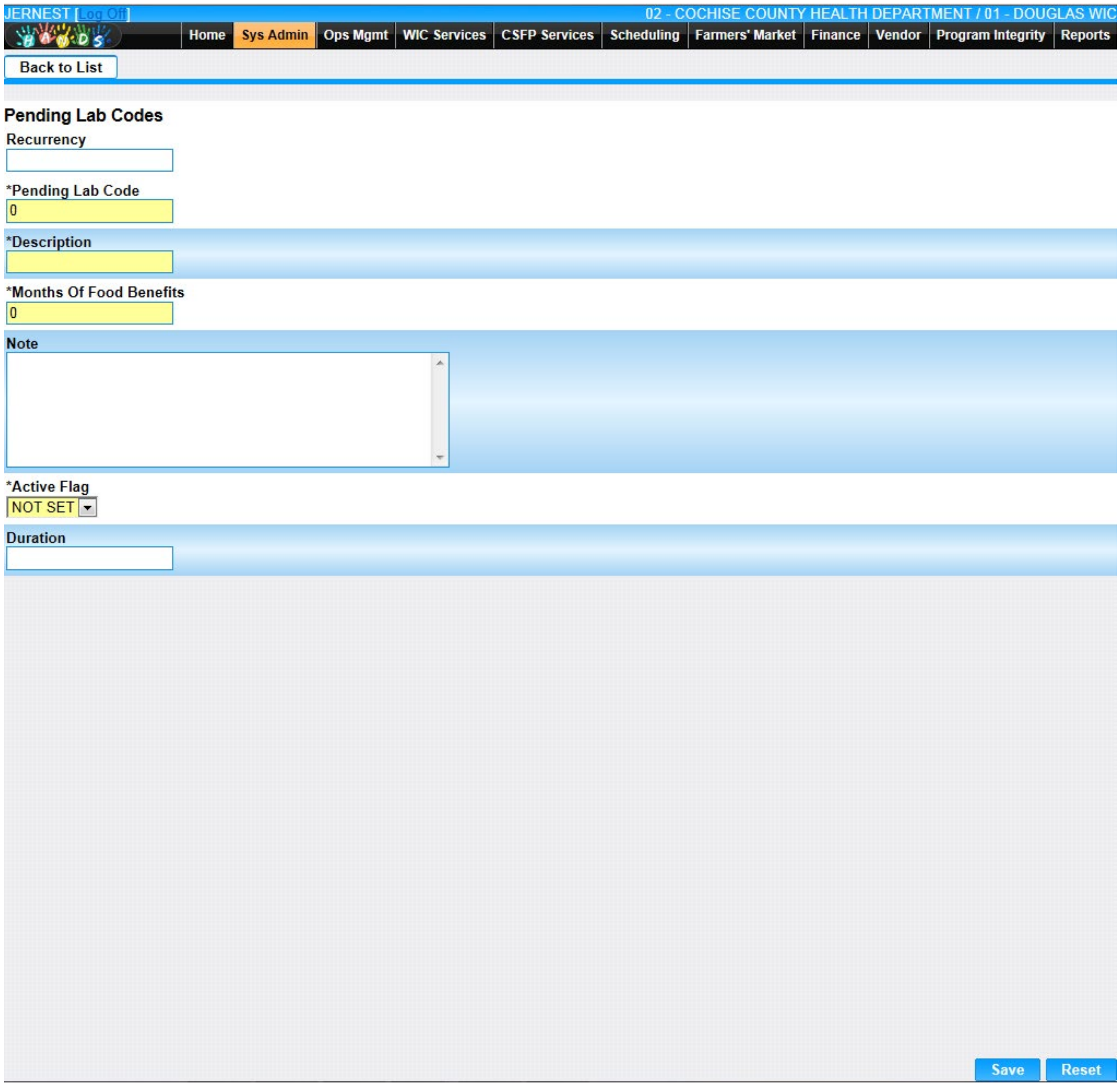


Figure 229: Add a Pending Lab Code Record

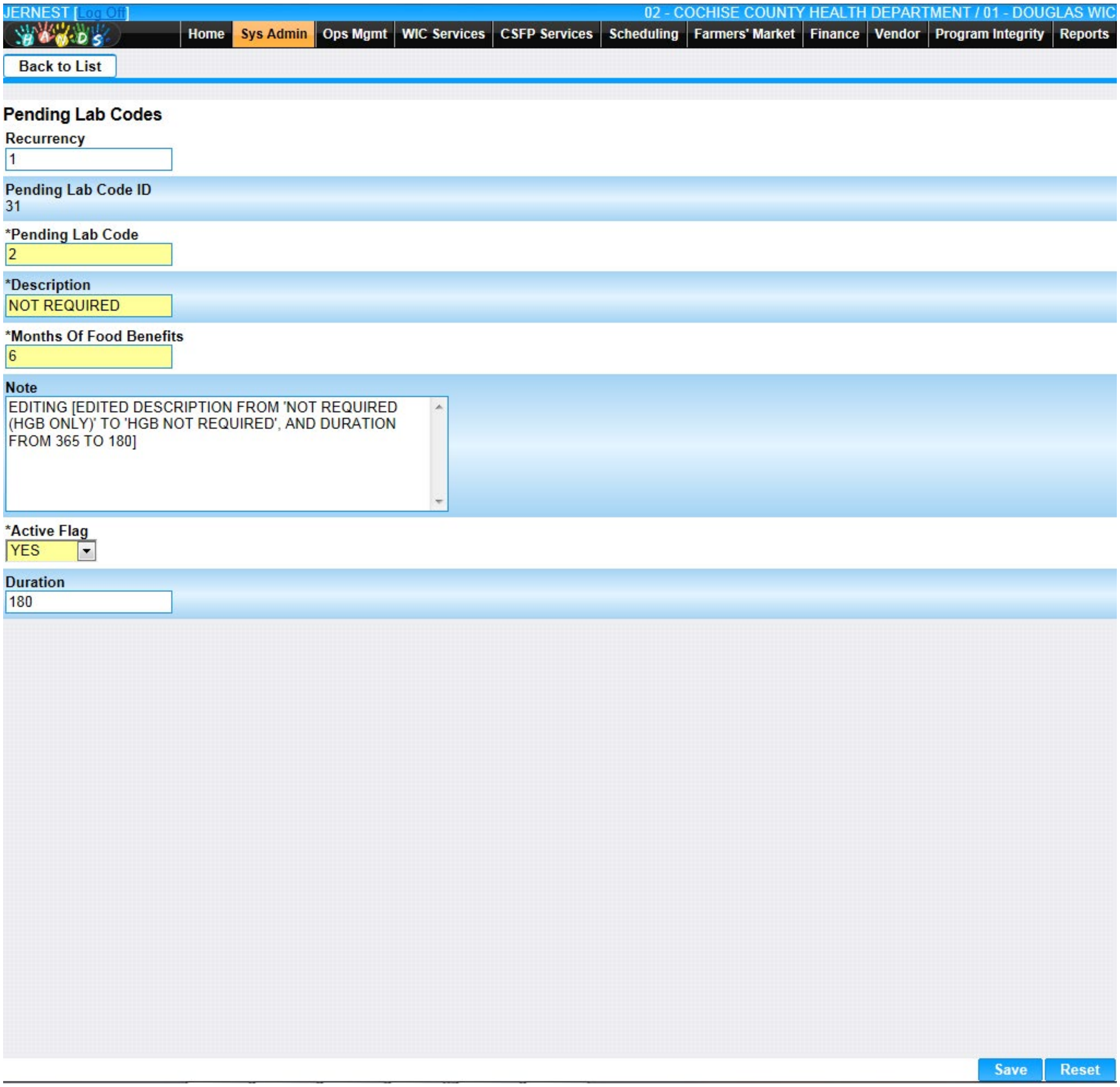


Figure 230: Edit a Pending Lab Code Record

Fields:

- **Pending Lab Code –** The unique user assigned code for the pending lab code record. This field is mandatory and accepts a max of four numeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the pending lab code. This field is mandatory and accepts up to 50 alphanumeric / special characters.
- **Months of Food Benefits –** The maximum number of months of benefits that the Client can be issued with the pending lab code assigned. This field is mandatory and accepts a max of two numeric characters.
- **Active Flag –** A drop down list to determine if the pending lab code record is active or not. If the Yes option is selected, then the pending lab code record will appear in the drop

down list. If the No option is selected, then the pending lab code record will not appear in the drop down list. This field is mandatory and defaults to Yes.

- **Duration –** The number of days that the pending lab code can be used for a Client's medical record (anthropometric/blood work data) before a new pending lab code or actual medical data must be entered. This field is optional and accepts a max of three numeric characters.
- **Recurrency –** The number of times the pending lab code can be assigned concurrently. This field is optional and accepts a max of three numeric characters.

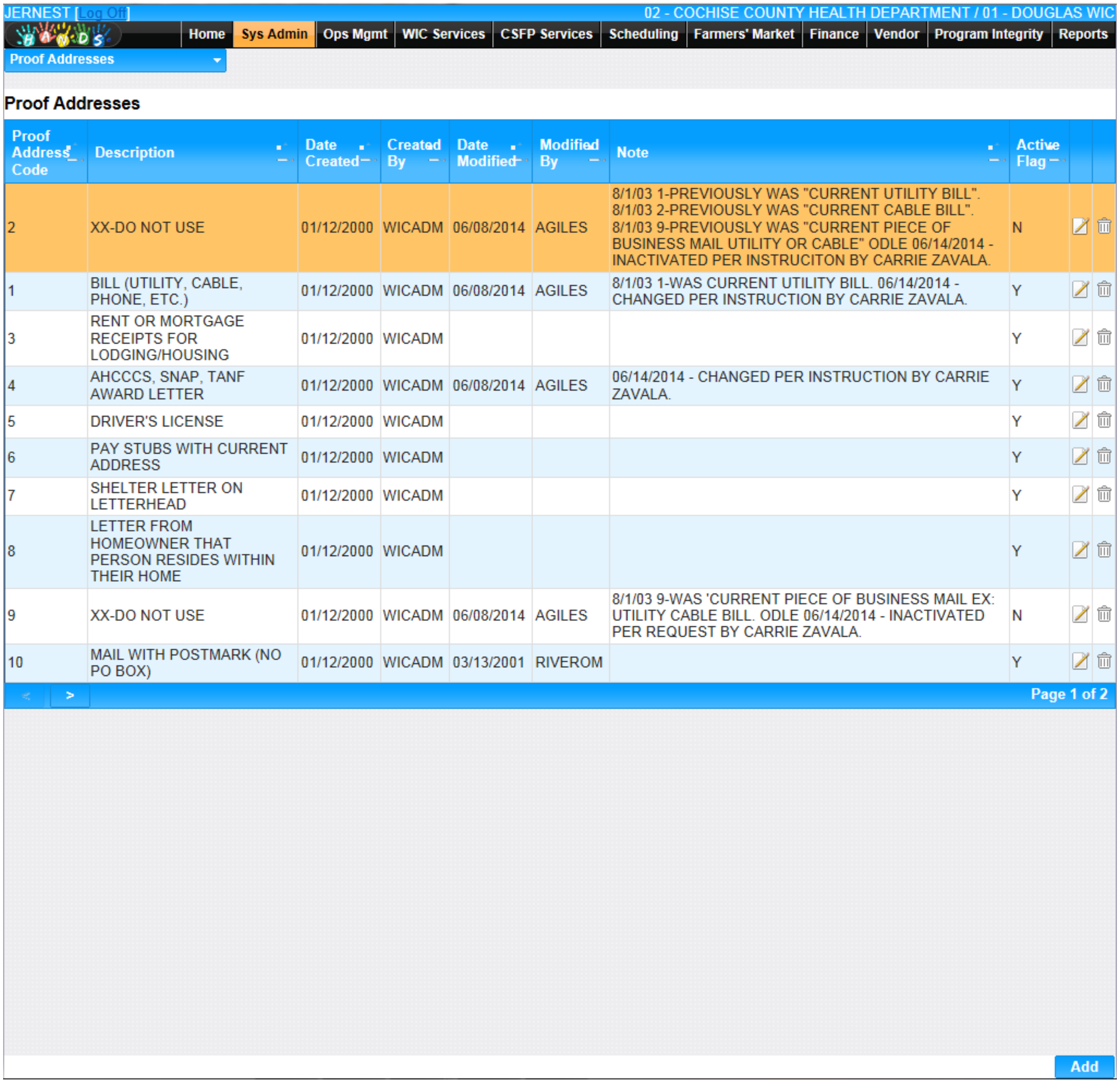
Calculations: None

Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple pending lab code records so that they have the same pending lab code.

16.18 Proof Addresses

Narrative:
The purpose of this page is to add and maintain proof of address records for the system. The proof of address records displayed in the base table are used on the Family information page to populate the proof of address drop down list.



Proof Address Code	Description	Date Created	Created By	Date Modified	Modified By	Note	Active Flag
2	XX-DO NOT USE	01/12/2000	WICADM	06/08/2014	AGILES	8/1/03 1-PREVIOUSLY WAS "CURRENT UTILITY BILL". 8/1/03 2-PREVIOUSLY WAS "CURRENT CABLE BILL". 8/1/03 9-PREVIOUSLY WAS "CURRENT PIECE OF BUSINESS MAIL UTILITY OR CABLE" ODLE 06/14/2014 - INACTIVATED PER INSTRUCITON BY CARRIE ZAVALA.	N
1	BILL (UTILITY, CABLE, PHONE, ETC.)	01/12/2000	WICADM	06/08/2014	AGILES	8/1/03 1-WAS CURRENT UTILITY BILL. 06/14/2014 - CHANGED PER INSTRUCTION BY CARRIE ZAVALA.	Y
3	RENT OR MORTGAGE RECEIPTS FOR LODGING/HOUSING	01/12/2000	WICADM				Y
4	AHCCCS, SNAP, TANF AWARD LETTER	01/12/2000	WICADM	06/08/2014	AGILES	06/14/2014 - CHANGED PER INSTRUCTION BY CARRIE ZAVALA.	Y
5	DRIVER'S LICENSE	01/12/2000	WICADM				Y
6	PAY STUBS WITH CURRENT ADDRESS	01/12/2000	WICADM				Y
7	SHELTER LETTER ON LETTERHEAD	01/12/2000	WICADM				Y
8	LETTER FROM HOMEOWNER THAT PERSON RESIDES WITHIN THEIR HOME	01/12/2000	WICADM				Y
9	XX-DO NOT USE	01/12/2000	WICADM	06/08/2014	AGILES	8/1/03 9-WAS 'CURRENT PIECE OF BUSINESS MAIL EX: UTILITY CABLE BILL. ODLE 06/14/2014 - INACTIVATED PER REQUEST BY CARRIE ZAVALA.	N
10	MAIL WITH POSTMARK (NO PO BOX)	01/12/2000	WICADM	03/13/2001	RIVEROM		Y

< > Page 1 of 2

Add

Figure 231: Proof Addresses Base Table

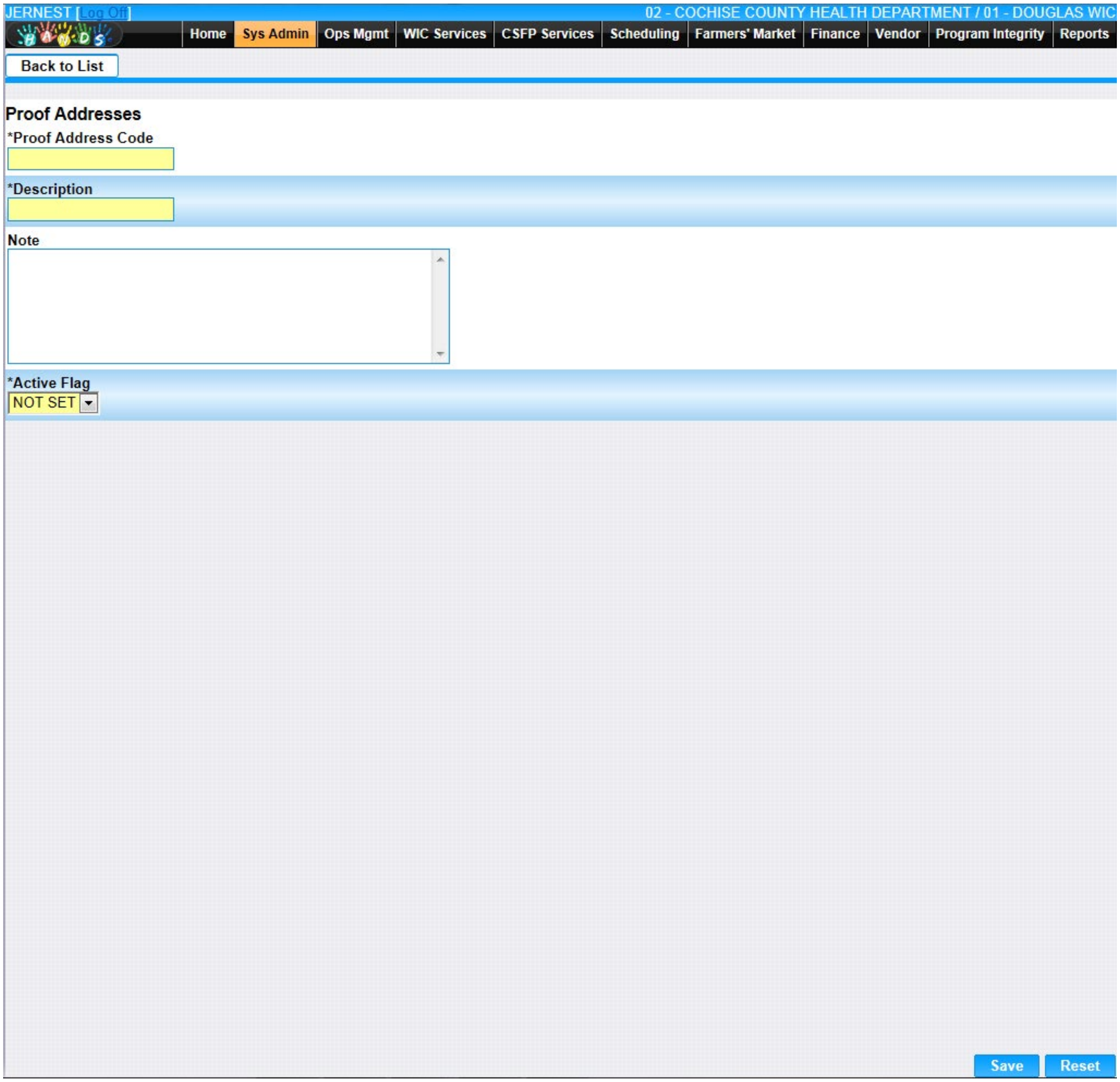


Figure 251: Add a Proof Addresses Record

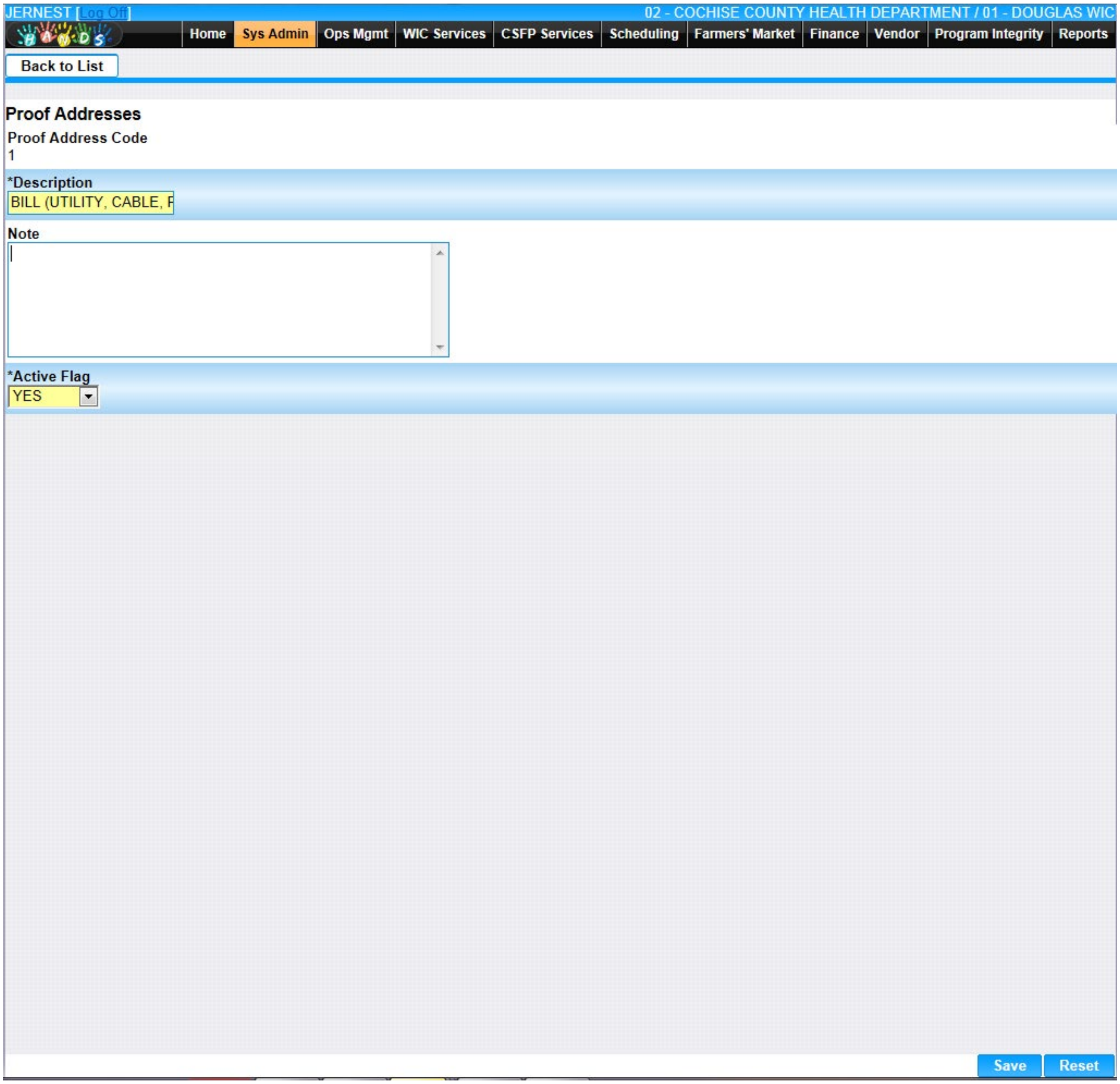


Figure 252: Edit a Proof Addresses Record

Fields:

- **Proof Address Code –** The unique user assigned code for the proof of address record. This field is mandatory and accepts a max of two alphanumeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the proof of address. This field is mandatory and accepts up to 60 alphanumeric / special characters.
- **Active Flag –** A drop down list to determine if the proof of address record is active or not. If the Yes option is selected, then the proof of address record will appear in the drop down list. If the No option is selected, then the proof of address record will not appear in the drop down list. This field is mandatory.

Calculations: None

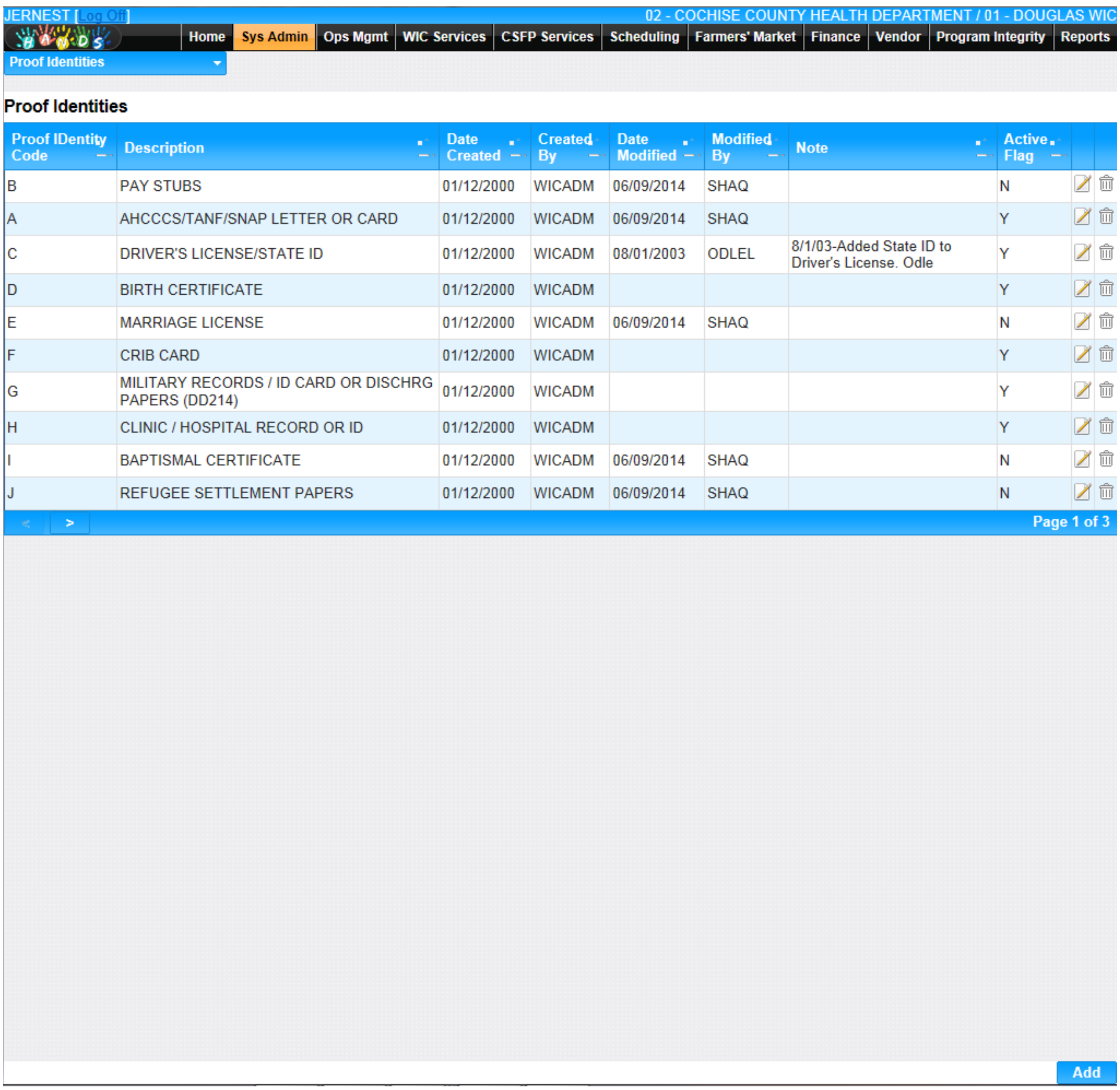
Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple proof of address records so that they have the same proof of address code.

16.19 Proof Identities

Narrative:

The purpose of this page is to add and maintain proof of identity records for the system. The proof of identity records displayed in the base table are used on the Family information and Client Information pages to populate the proof of identity drop down list.



Proof IDentity Code	Description	Date Created	Created By	Date Modified	Modified By	Note	Active Flag
B	PAY STUBS	01/12/2000	WICADM	06/09/2014	SHAQ		N
A	AHCCCS/TANF/SNAP LETTER OR CARD	01/12/2000	WICADM	06/09/2014	SHAQ		Y
C	DRIVER'S LICENSE/STATE ID	01/12/2000	WICADM	08/01/2003	ODLEL	8/1/03-Added State ID to Driver's License. Odle	Y
D	BIRTH CERTIFICATE	01/12/2000	WICADM				Y
E	MARRIAGE LICENSE	01/12/2000	WICADM	06/09/2014	SHAQ		N
F	CRIB CARD	01/12/2000	WICADM				Y
G	MILITARY RECORDS / ID CARD OR DISCHRG PAPERS (DD214)	01/12/2000	WICADM				Y
H	CLINIC / HOSPITAL RECORD OR ID	01/12/2000	WICADM				Y
I	BAPTISMAL CERTIFICATE	01/12/2000	WICADM	06/09/2014	SHAQ		N
J	REFUGEE SETTLEMENT PAPERS	01/12/2000	WICADM	06/09/2014	SHAQ		N

Figure 253: Proof Identities Base Table

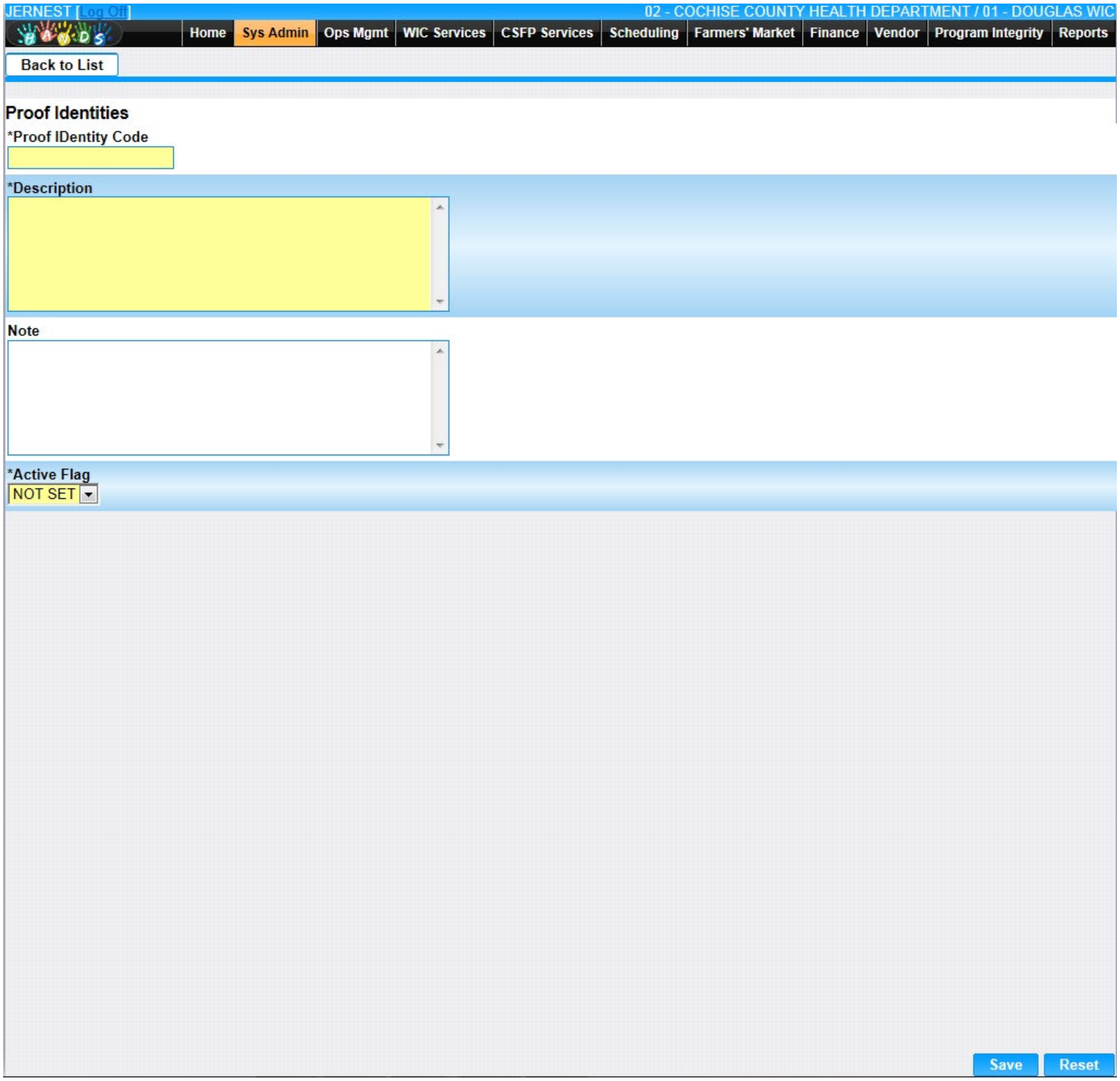


Figure 254: Add a Proof Identities Record

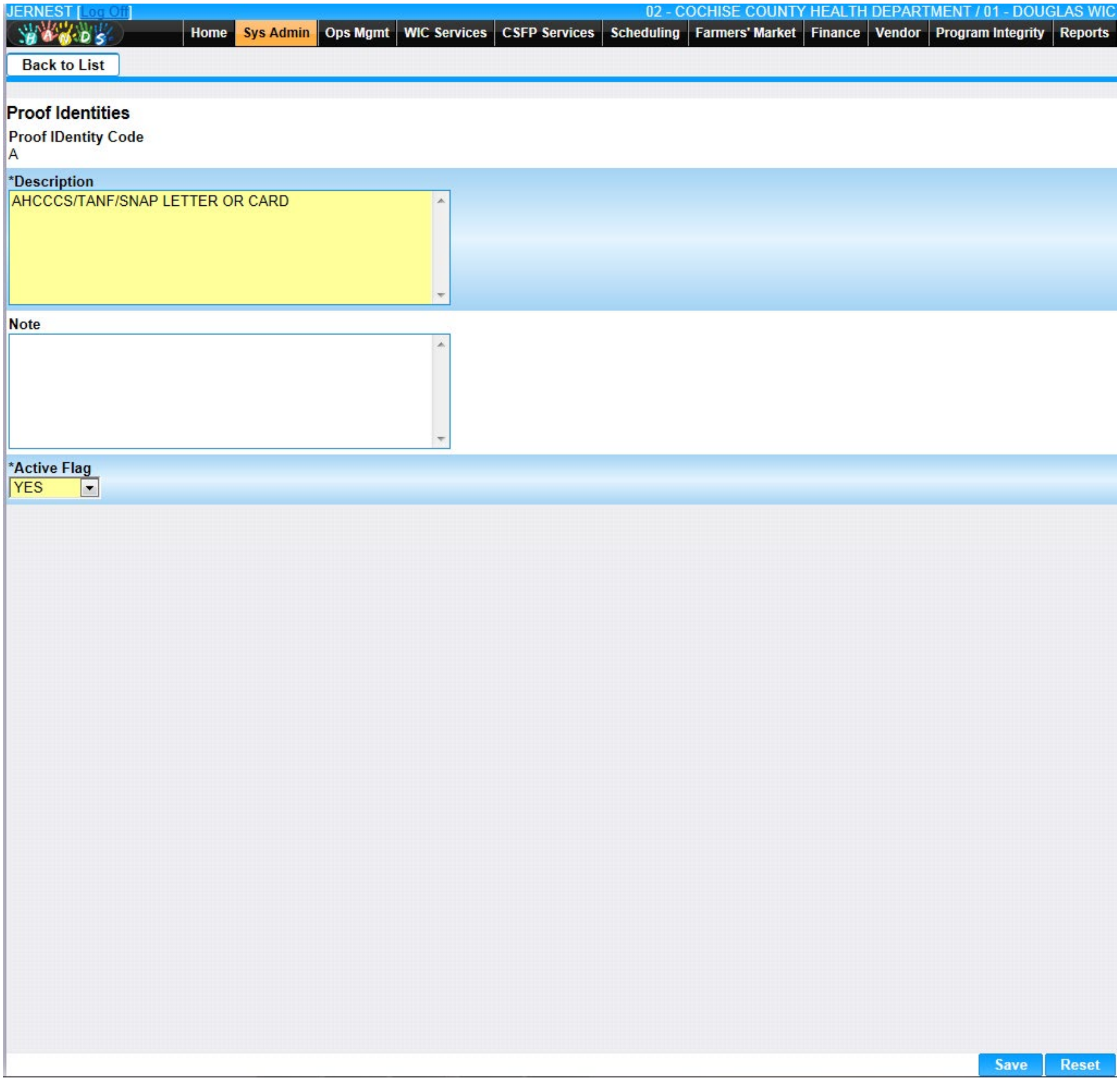


Figure 255: Edit a Proof Identities Record

Fields:

- **Proof Identity Code –** The unique user assigned code for the proof of identity record. This field is mandatory and accepts a max of one alphanumeric character; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the proof of identity. This field is mandatory and accepts up to 120 alphanumeric / special characters.
- **Active Flag –** A drop down list to determine if the proof of identity record is active or not. If the Yes option is selected, then the proof of identity record will appear in the drop down list. If the No option is selected, then the proof of identity record will not appear in the drop down list. This field is mandatory.

Calculations: None

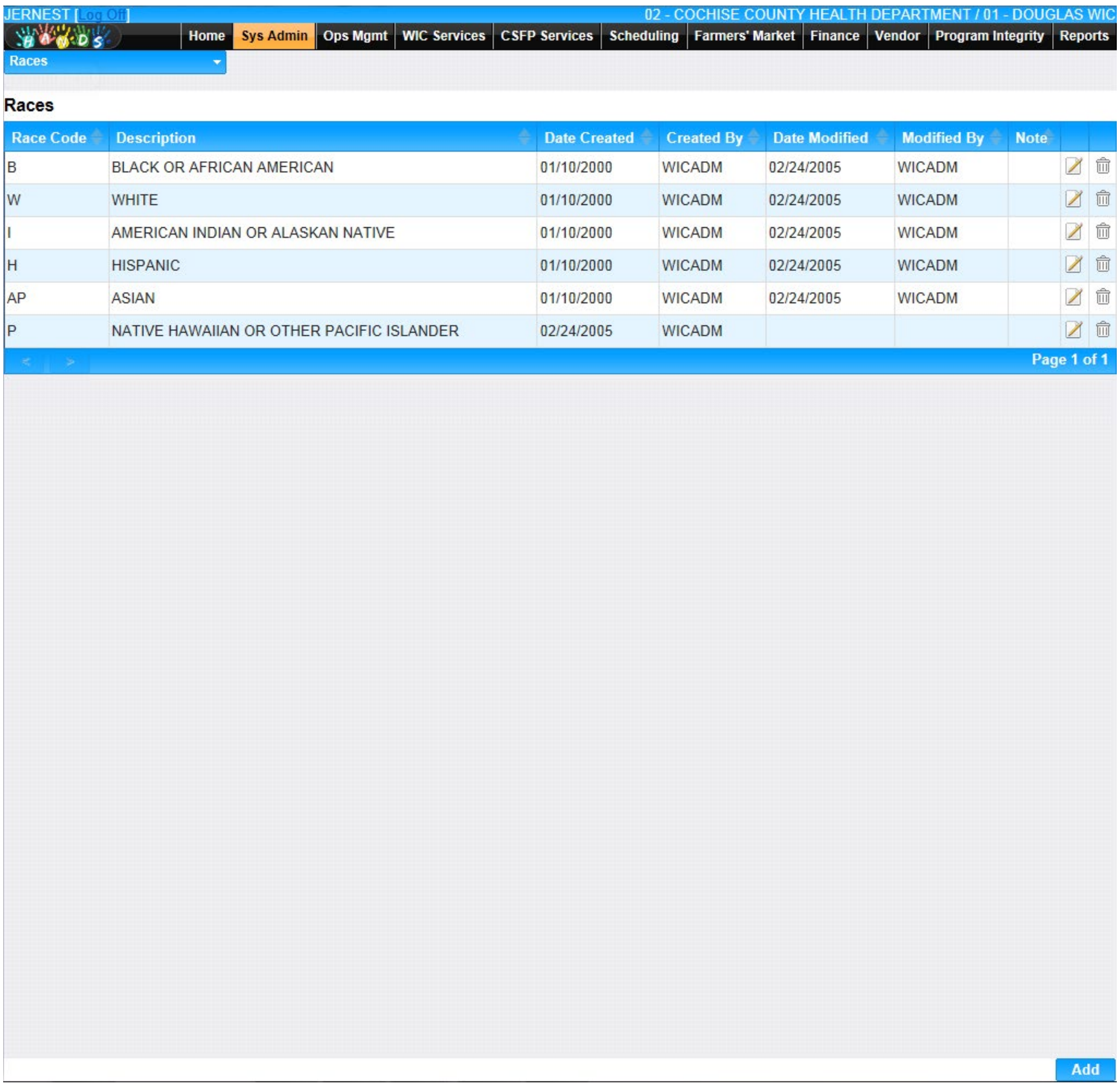
Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple proof of identity records so that they have the same proof of identity code.

16.20 Races

Narrative:

The purpose of this page is to add and maintain race records for the system. The race records displayed in the base table are used in the race ethnicities base table for creating the race ethnicity records.



Race Code	Description	Date Created	Created By	Date Modified	Modified By	Note		
B	BLACK OR AFRICAN AMERICAN	01/10/2000	WICADM	02/24/2005	WICADM			
W	WHITE	01/10/2000	WICADM	02/24/2005	WICADM			
I	AMERICAN INDIAN OR ALASKAN NATIVE	01/10/2000	WICADM	02/24/2005	WICADM			
H	HISPANIC	01/10/2000	WICADM	02/24/2005	WICADM			
AP	ASIAN	01/10/2000	WICADM	02/24/2005	WICADM			
P	NATIVE HAWAIIAN OR OTHER PACIFIC ISLANDER	02/24/2005	WICADM					

Figure 256: Races Base Table

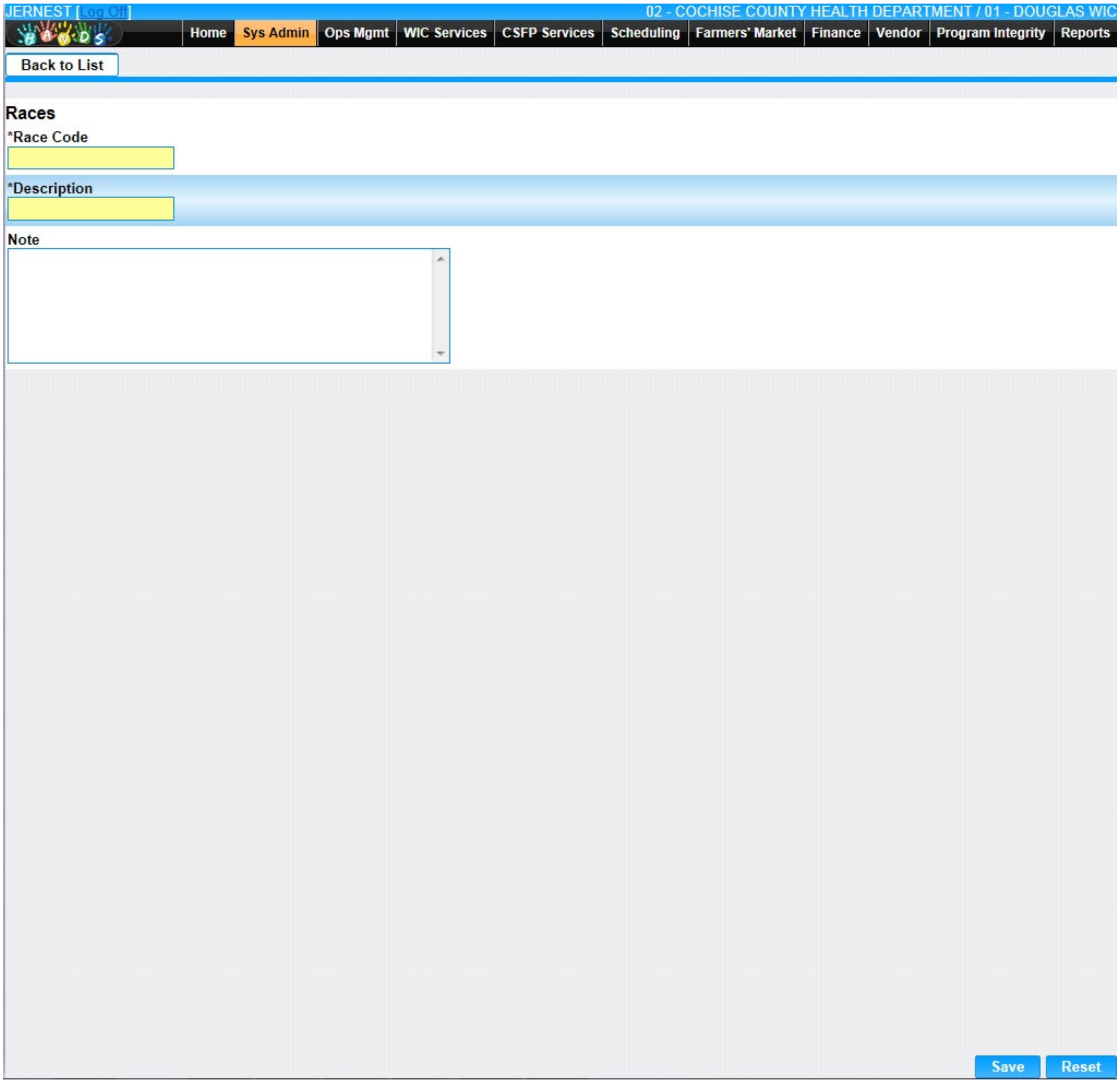


Figure 257: Add a Race Record

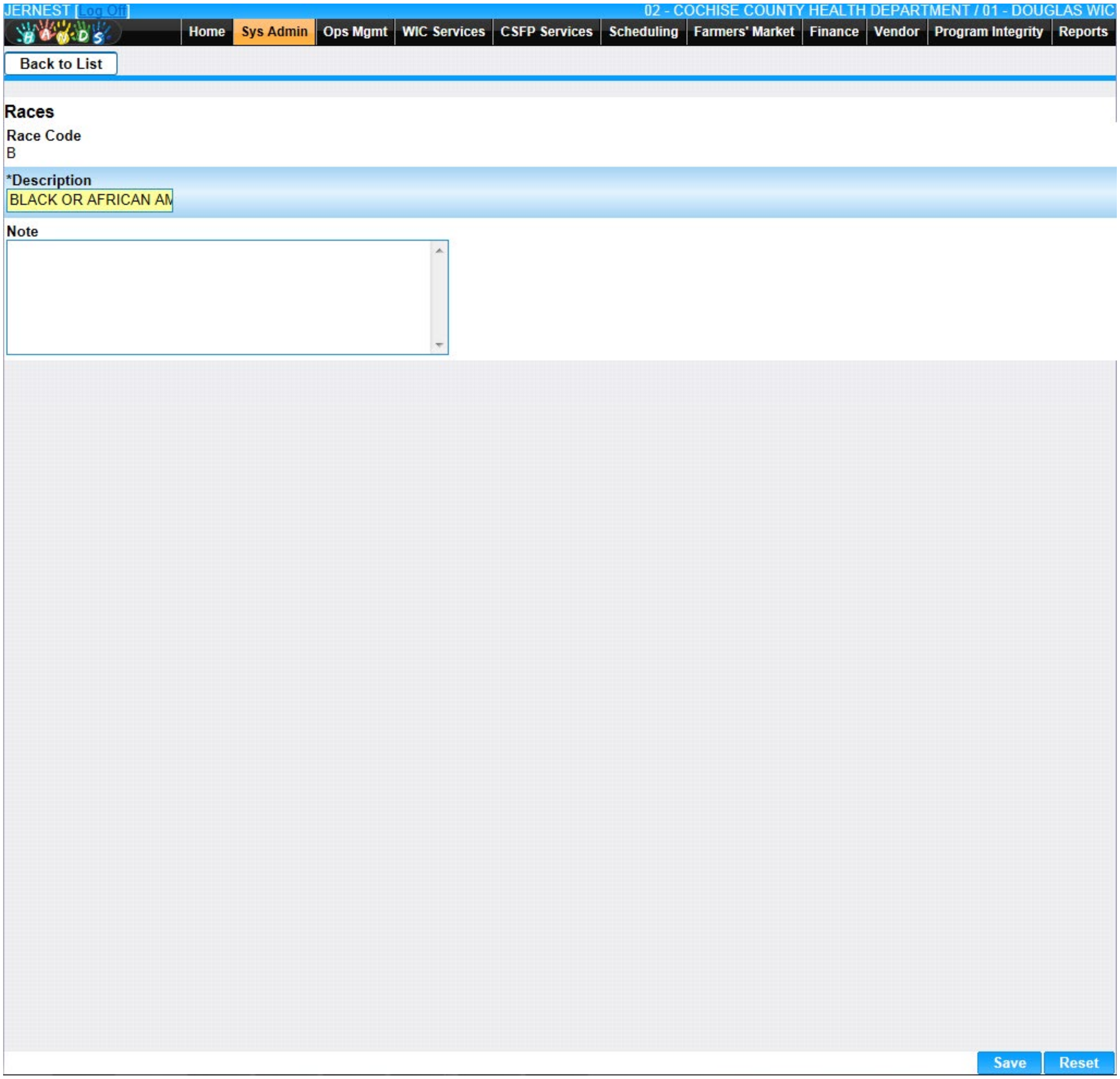


Figure 258: Edit a Race Record

Fields:

- **Race Code –** The unique user assigned code for the race record. This field is mandatory and accepts a max of two alphanumeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the race. This field is mandatory and accepts up to 60 alphanumeric / special characters.

Calculations: None

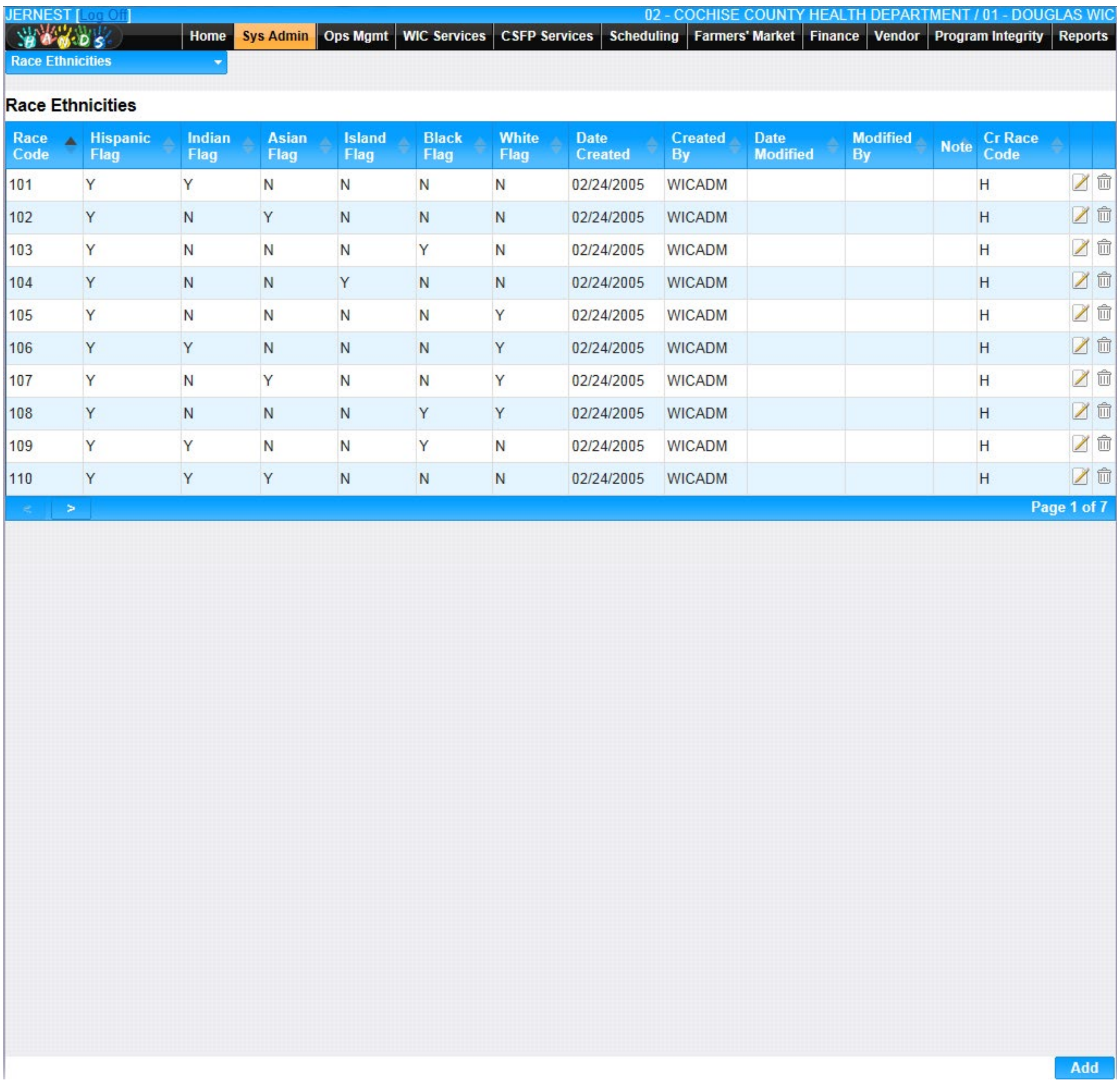
Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple race records so that they have the same race code.

16.21 Race Ethnicities

Narrative:

The purpose of this page is to add and maintain race ethnicity records for the system. The race ethnicity records displayed in the base table make up the user selections in the race and ethnicity section of the Client information page. The Client will be assigned the corresponding race code for the matching race ethnicity record based on the user selections on the Client information page.



Race Code	Hispanic Flag	Indian Flag	Asian Flag	Island Flag	Black Flag	White Flag	Date Created	Created By	Date Modified	Modified By	Note	Cr Race Code
101	Y	Y	N	N	N	N	02/24/2005	WICADM				H
102	Y	N	Y	N	N	N	02/24/2005	WICADM				H
103	Y	N	N	N	Y	N	02/24/2005	WICADM				H
104	Y	N	N	Y	N	N	02/24/2005	WICADM				H
105	Y	N	N	N	N	Y	02/24/2005	WICADM				H
106	Y	Y	N	N	N	Y	02/24/2005	WICADM				H
107	Y	N	Y	N	N	Y	02/24/2005	WICADM				H
108	Y	N	N	N	Y	Y	02/24/2005	WICADM				H
109	Y	Y	N	N	Y	N	02/24/2005	WICADM				H
110	Y	Y	Y	N	N	N	02/24/2005	WICADM				H

Figure 259: Race Ethnicities Base Table

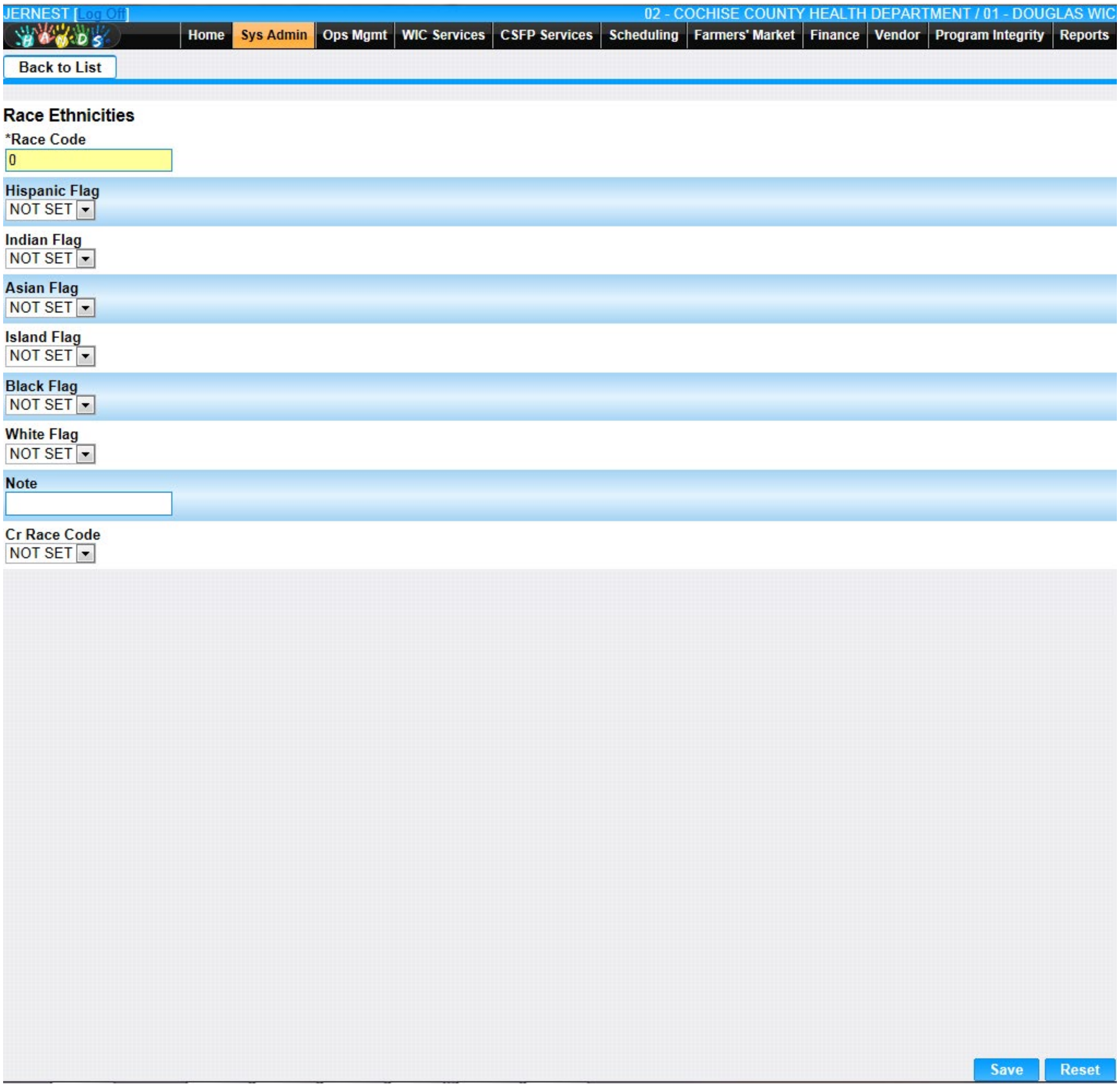


Figure 260: Add a Race Ethnicity Record

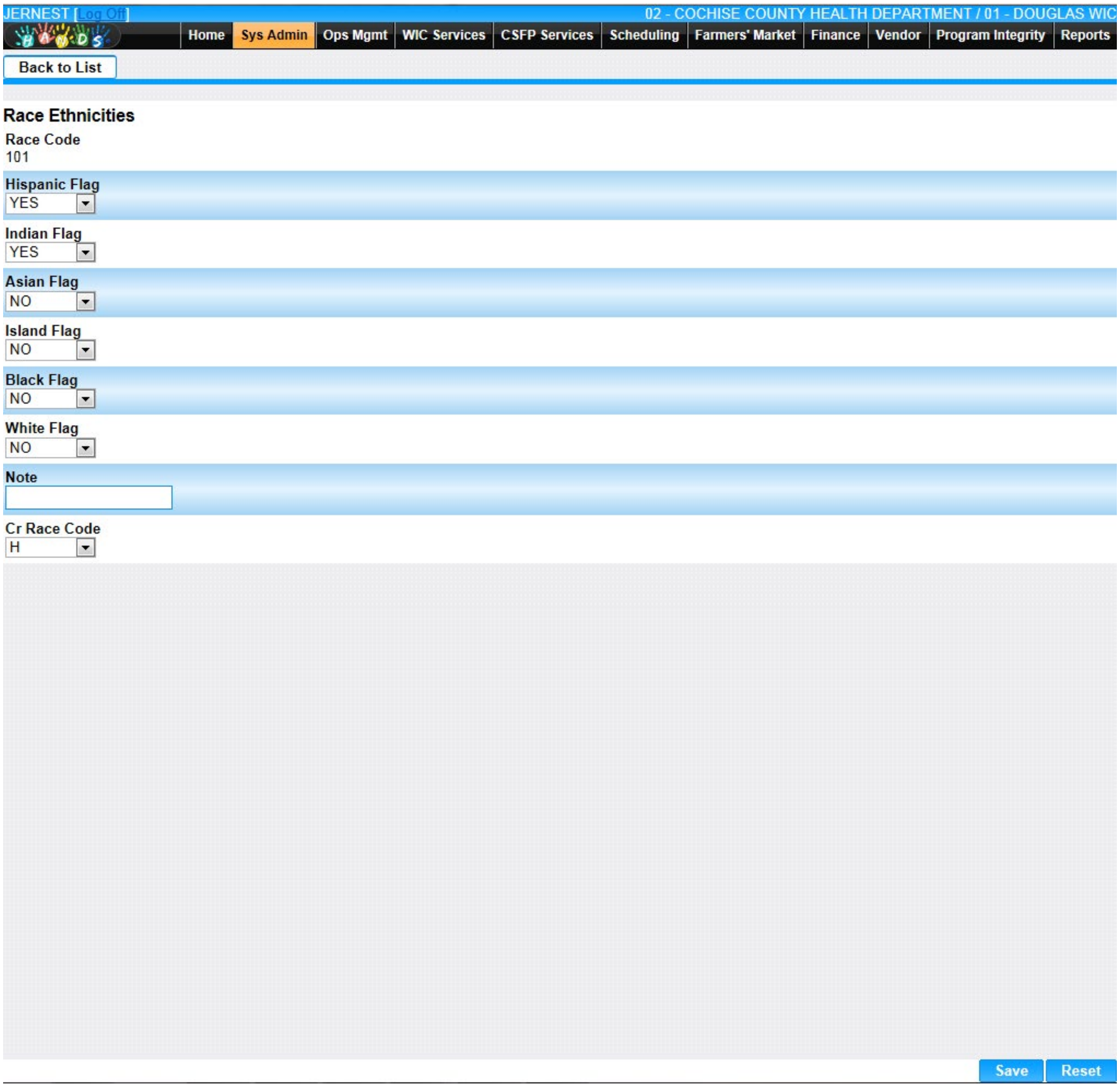


Figure 261: Edit a Race Ethnicity Record

Fields:

- **Race Code –** The unique user assigned code for the race ethnicity record. This field is mandatory and accepts a max of three numeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Hispanic Flag –** A drop down list to determine if the race ethnicity record is considered Hispanic. If the Yes option is selected, then the race ethnicity record is considered Hispanic. If the No option is selected, then the race ethnicity record is not considered Hispanic.
- **Indian Flag** – A drop down list to determine if the race ethnicity record is considered Indian. If the Yes option is selected, then the race ethnicity record is considered Indian. If the No option is selected, then the race ethnicity record is not considered Indian.

- **Asian Flag** – A drop down list to determine if the race ethnicity record is considered Asian. If the Yes option is selected, then the race ethnicity record is considered Asian. If the No option is selected, then the race ethnicity record is not considered Asian.
- **Island Flag** – A drop down list to determine if the race ethnicity record is considered Island. If the Yes option is selected, then the race ethnicity record is considered Island. If the No option is selected, then the race ethnicity record is not considered Island.
- **Black Flag** – A drop down list to determine if the race ethnicity record is considered Black. If the Yes option is selected, then the race ethnicity record is considered Black. If the No option is selected, then the race ethnicity record is not considered Black.
- **White Flag** – A drop down list to determine if the race ethnicity record is considered White. If the Yes option is selected, then the race ethnicity record is considered White. If the No option is selected, then the race ethnicity record is not considered White.
- **Cr Race Code** – A drop down list to determine the race for the race ethnicity record. The drop down list is populated with data populated in the races base table.

Calculations: None

Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple race ethnicity records so that they have the same race code.
2) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple race ethnicity records so that they have the same combination of flags for the same cr race code selected.

16.22 Ranges

Narrative: The purpose of this page is to add and maintain range records for the system. The range records displayed in the base table are used in the calculations of acceptable weight and height ranges for entered anthropometric data records on the medical page.
NOTE: This base table is strictly maintained by development and not available for updating through the front end.

RANGE KEY	CATEGORY CODE	LOW RANGE	HIGH RANGE
BMI		5	99.9
HEIGHT_ENG		10	104
HEIGHT_MET		25.5	264.1
WEIGHT_ENG		50	499
WEIGHT_MET		22.7	226.3
PRE_PREG_WEIGHT_ENG		50	499
PRE_PREG_WEIGHT_MET		22.7	226.3
DELIVERY_WEIGHT_ENG		50	499
DELIVERY_WEIGHT_MET		22.7	226.3
WEIGHT_GAIN_LOSS_ENG	PG1	-97	499
WEIGHT_GAIN_LOSS_ENG	PG2	-97	499

WEIGHT_GAIN_LOSS_MET	PG1	-42.3	226.3
WEIGHT_GAIN_LOSS_MET	PG2	-42.3	226.3

Figure 232: Ranges Base Table Data as of 10/22/2015

Fields:

- **Range Key –** The unique user assigned description for the range record. This field is mandatory and accepts a maximum of thirty alphanumeric / special characters.
  NOTE: The logic for ranges being used on the medical page looks specifically at the range key description currently in the table. If the description is changed for these records the system will not work correctly. The user only should update the Category Code, low range, and high range fields.
- **Category Code –** A drop down list to determine the category that the range record applies too. This field is optional. Options in the drop down list are populated based on data populated in the categories base table.
  NOTE: If the category code field is left blank the range record will be used for field validation for all category Clients.
- **Low Range –** The low range value for the range record. This field is mandatory and accepts a maximum of 6 numeric characters followed by 8 decimal points.
- **High Range –** the high range value for the range record. This field is mandatory and accepts a maximum of 6 numeric characters followed by 8 decimal points. High range must be greater than the value entered in the low range field.

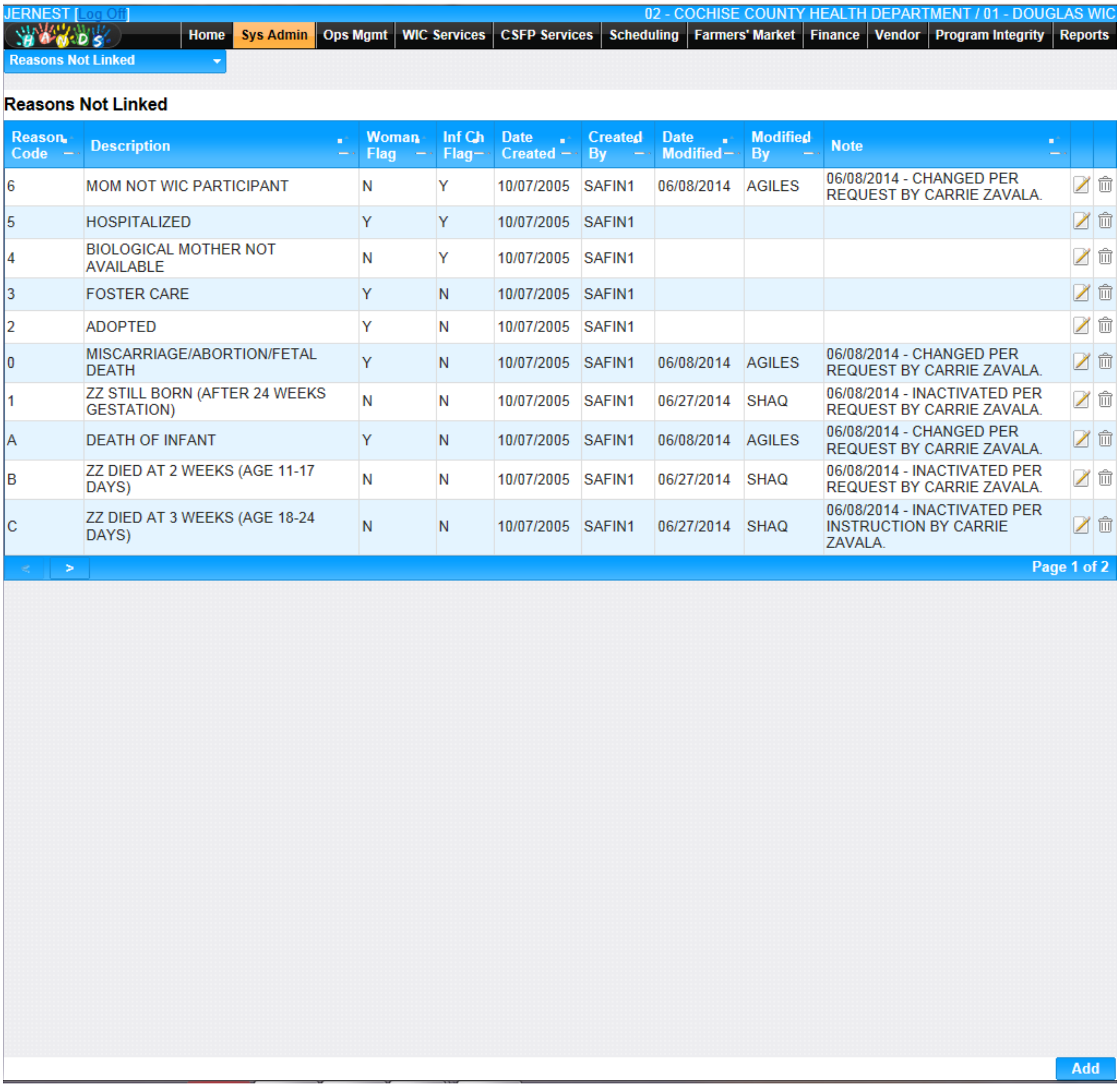
Calculations: None

Background Processes: None

16.23 Reasons Not Linked

Narrative:

The purpose of this page is to add and maintain reasons not linked records for the system. The reasons not linked records displayed in the base table are used on the Certification Action page to populate the reasons not linked drop down list.



Reasons Not Linked

Reason Code	Description	Woman Flag	Inf Ch Flag	Date Created	Created By	Date Modified	Modified By	Note
6	MOM NOT WIC PARTICIPANT	N	Y	10/07/2005	SAFIN1	06/08/2014	AGILES	06/08/2014 - CHANGED PER REQUEST BY CARRIE ZAVALA.
5	HOSPITALIZED	Y	Y	10/07/2005	SAFIN1			
4	BIOLOGICAL MOTHER NOT AVAILABLE	N	Y	10/07/2005	SAFIN1			
3	FOSTER CARE	Y	N	10/07/2005	SAFIN1			
2	ADOPTED	Y	N	10/07/2005	SAFIN1			
0	MISCARRIAGE/ABORTION/FETAL DEATH	Y	N	10/07/2005	SAFIN1	06/08/2014	AGILES	06/08/2014 - CHANGED PER REQUEST BY CARRIE ZAVALA.
1	ZZ STILL BORN (AFTER 24 WEEKS GESTATION)	N	N	10/07/2005	SAFIN1	06/27/2014	SHAQ	06/08/2014 - INACTIVATED PER REQUEST BY CARRIE ZAVALA.
A	DEATH OF INFANT	Y	N	10/07/2005	SAFIN1	06/08/2014	AGILES	06/08/2014 - CHANGED PER REQUEST BY CARRIE ZAVALA.
B	ZZ DIED AT 2 WEEKS (AGE 11-17 DAYS)	N	N	10/07/2005	SAFIN1	06/27/2014	SHAQ	06/08/2014 - INACTIVATED PER REQUEST BY CARRIE ZAVALA.
C	ZZ DIED AT 3 WEEKS (AGE 18-24 DAYS)	N	N	10/07/2005	SAFIN1	06/27/2014	SHAQ	06/08/2014 - INACTIVATED PER INSTRUCTION BY CARRIE ZAVALA.

Figure 262: Reasons Not Linked Base Table

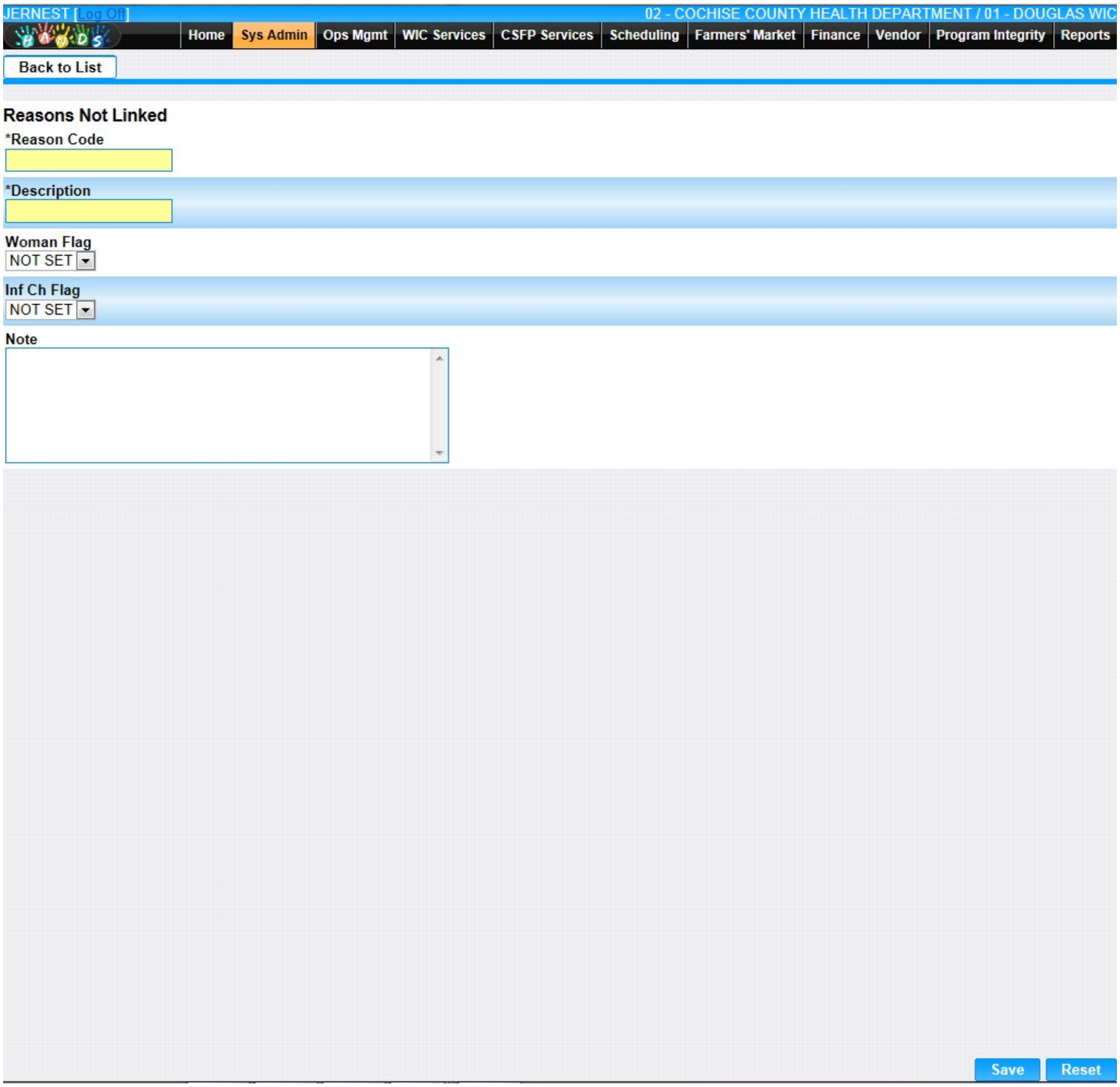


Figure 263: Add a Reasons Not Linked Record

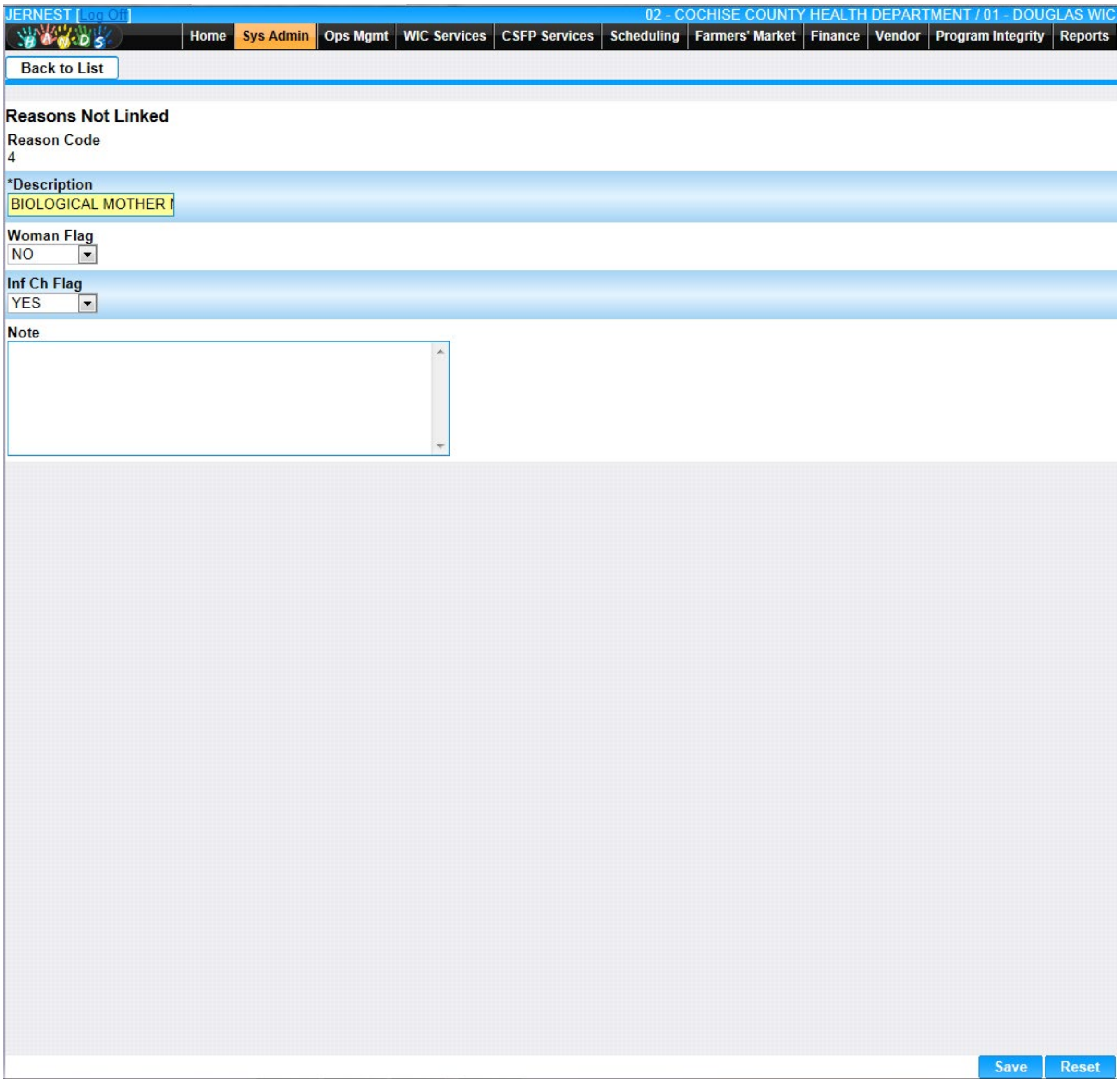


Figure 264: Edit a Reasons Not Linked Record

Fields:

- **Reason Code –** The unique user assigned code for the reasons not linked record. This field is mandatory and accepts a max of two alphanumeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the reasons not linked. This field is mandatory and accepts up to 40 alphanumeric / special characters.
- **Woman Flag** – A drop down list to determine if the reasons not linked record is for women. If the Yes option is selected, then the reasons not linked record will appear in the drop down list when the Client category is a woman. If the No option is selected, then the reasons not linked record will not appear in the drop down list for woman.
- **Inf Ch Flag** – A drop down list to determine if the reasons not linked record is for infant/child category Clients. If the Yes option is selected, then the reasons not linked

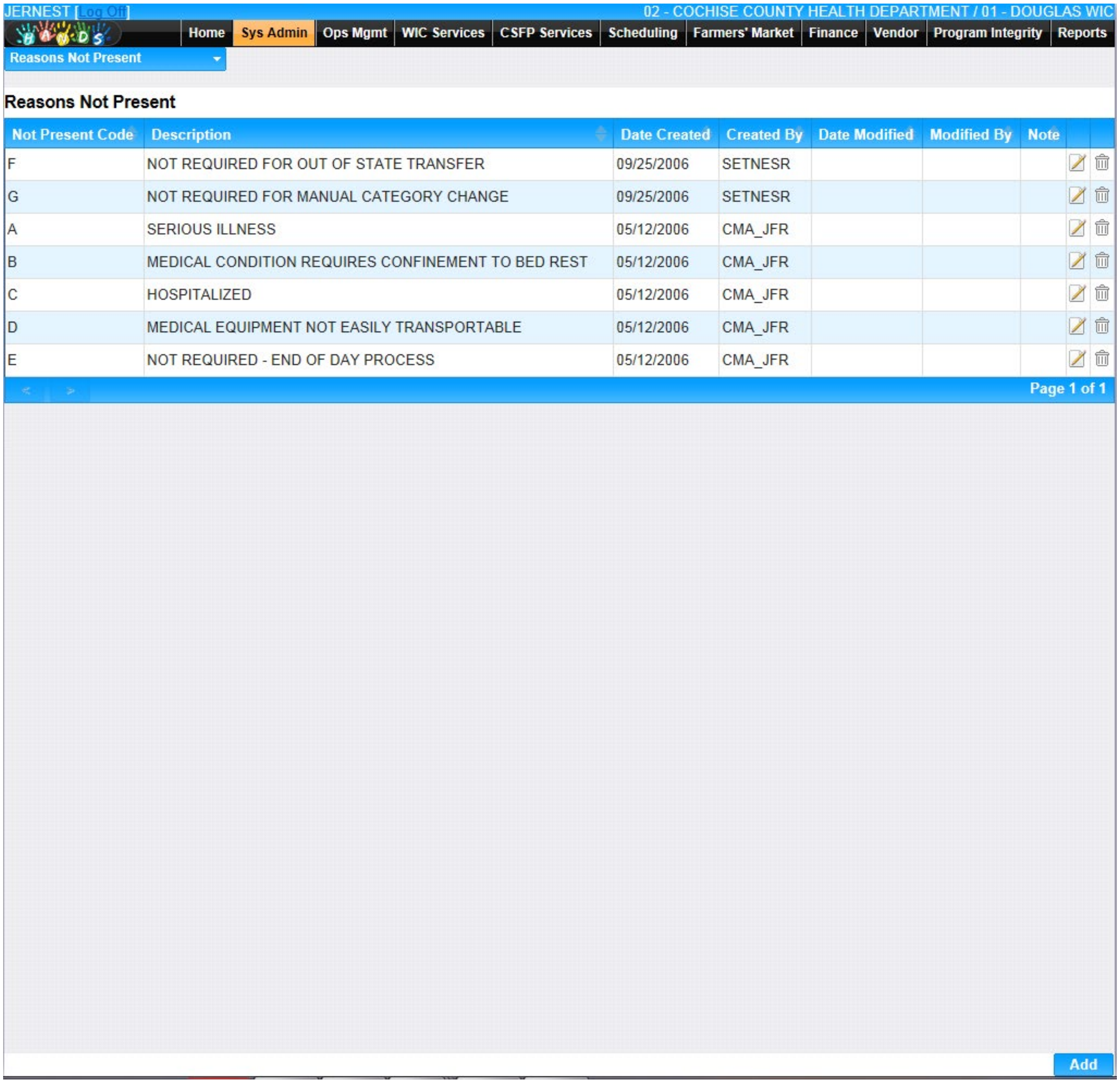
record will appear in the drop down list for infant/child category Clients. If the No option is selected, then the reasons not linked record will not appear in the drop down list for infant/child category Clients.

Calculations: None

Background Processes:
1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple reasons not linked records so that they have the same reason code.

16.24 Reasons Not Present

Narrative:
The purpose of this page is to add and maintain reasons not present records for the system. The reasons not present records displayed in the base table are used on the Certification Action page to populate the reasons not present drop down list.



Not Present Code	Description	Date Created	Created By	Date Modified	Modified By	Note
F	NOT REQUIRED FOR OUT OF STATE TRANSFER	09/25/2006	SETNESR			
G	NOT REQUIRED FOR MANUAL CATEGORY CHANGE	09/25/2006	SETNESR			
A	SERIOUS ILLNESS	05/12/2006	CMA_JFR			
B	MEDICAL CONDITION REQUIRES CONFINEMENT TO BED REST	05/12/2006	CMA_JFR			
C	HOSPITALIZED	05/12/2006	CMA_JFR			
D	MEDICAL EQUIPMENT NOT EASILY TRANSPORTABLE	05/12/2006	CMA_JFR			
E	NOT REQUIRED - END OF DAY PROCESS	05/12/2006	CMA_JFR			

Figure 265: Reasons Not Present Base Table

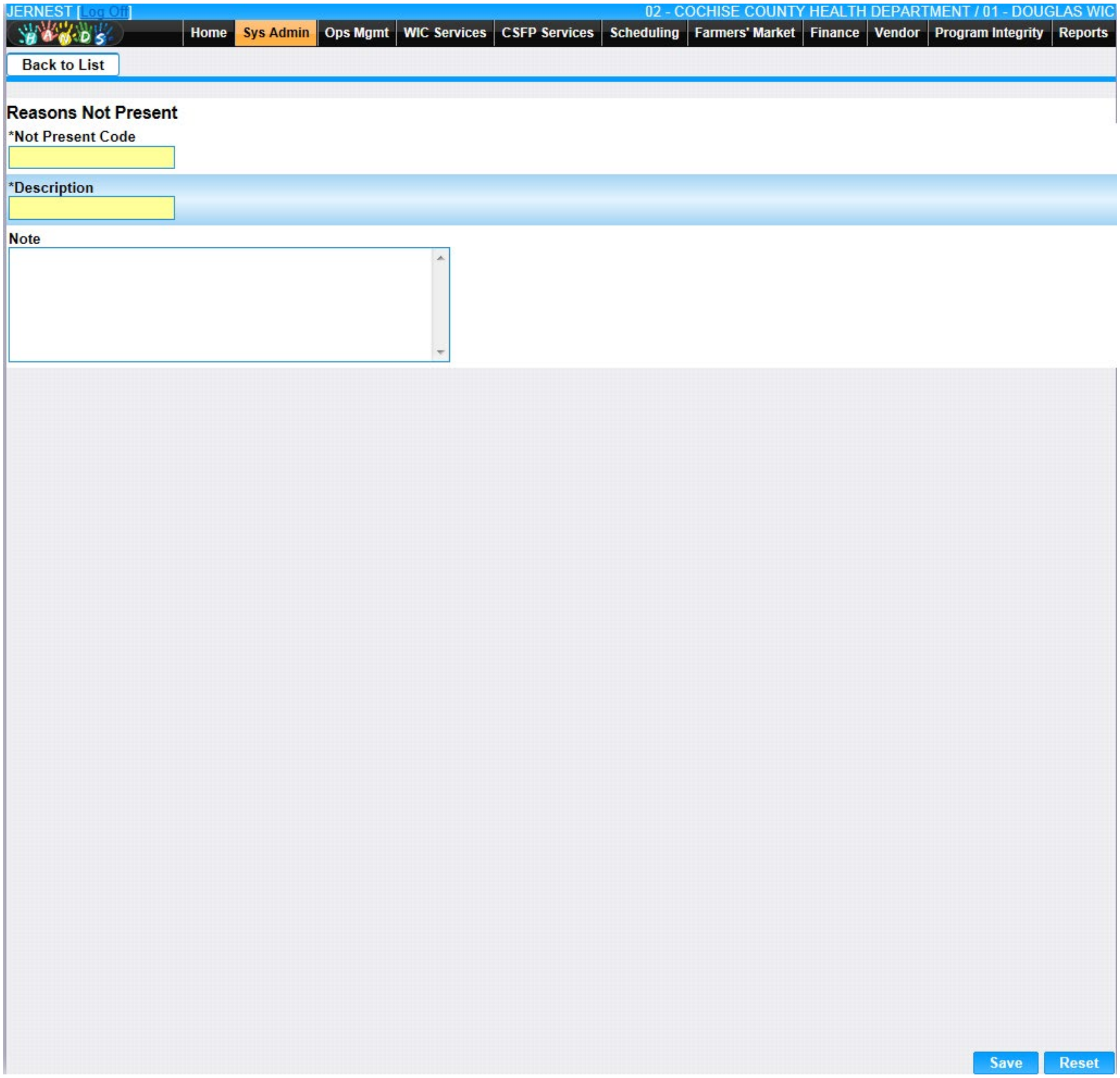


Figure 266: Add a Reasons Not Present Record

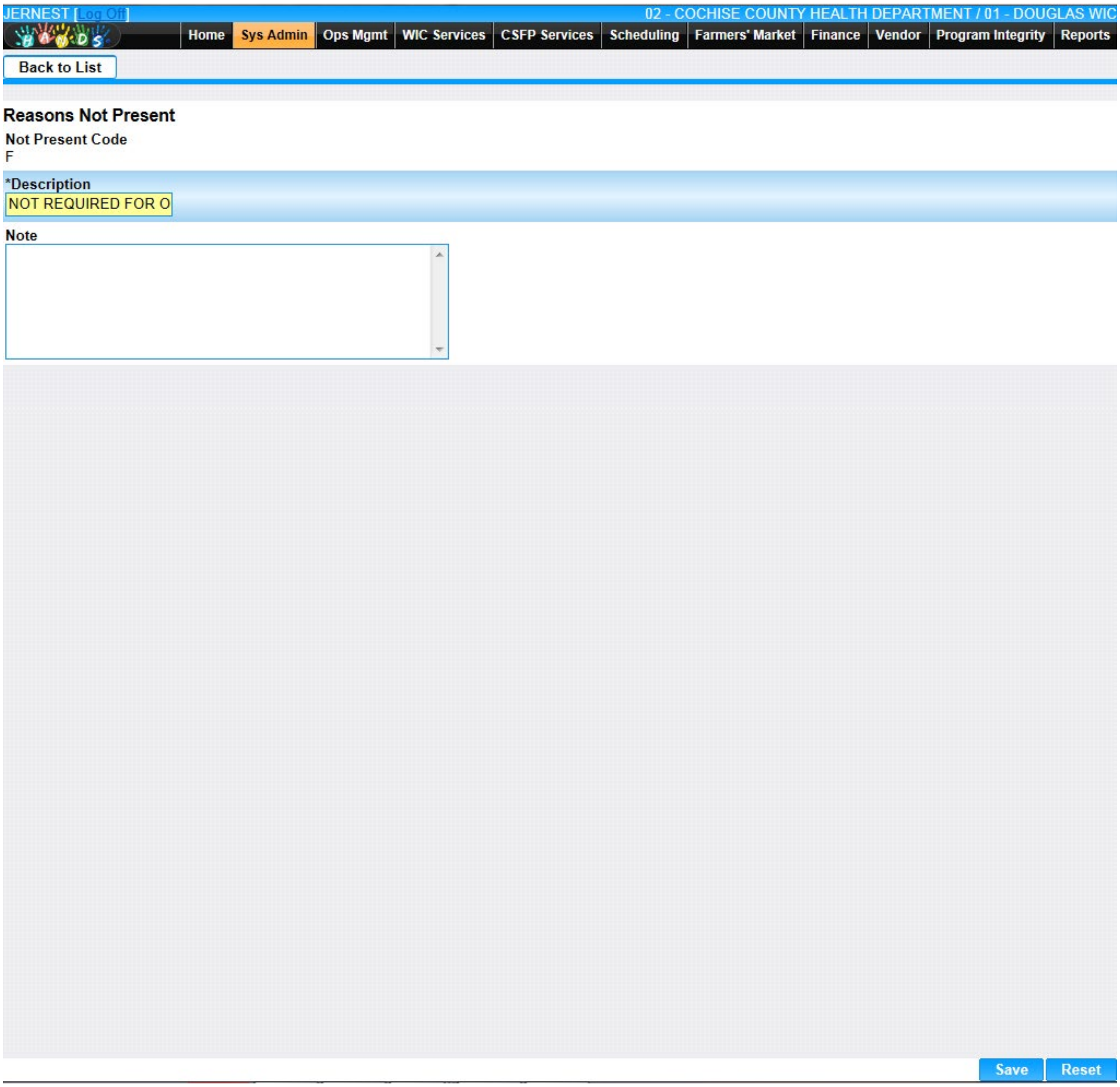


Figure 267: Edit a Reasons Not Present Record

Fields:

- **Not Present Code –** The unique user assigned code for the reasons not present record. This field is mandatory and accepts a max of two alphanumeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the reasons not present. This field is mandatory and accepts up to 60 alphanumeric / special characters.

Calculations: None

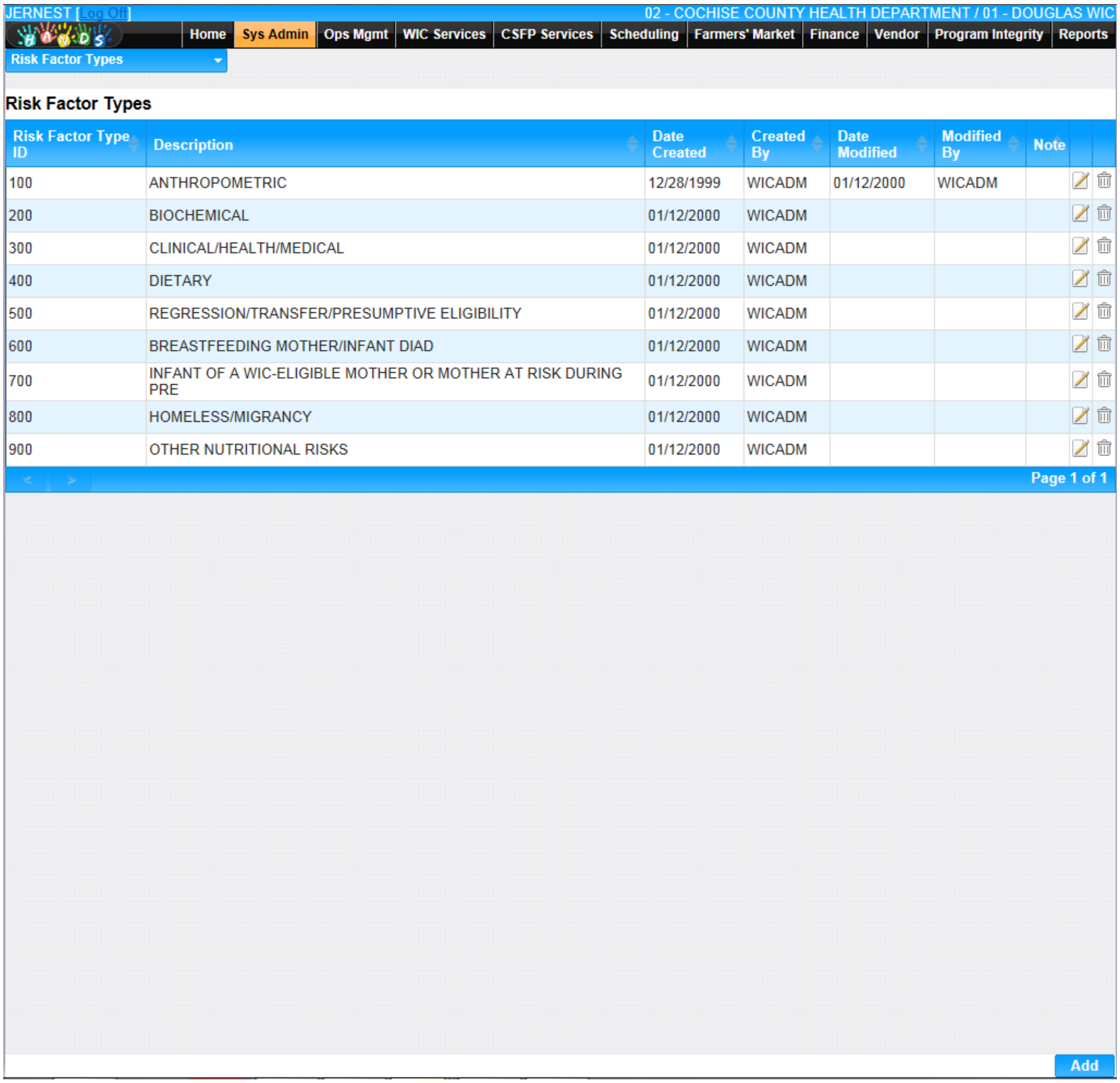
Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple reason not present records so that they have the same not present code.

16.25 Risk Factor Types

Narrative:

The purpose of this page is to add and maintain risk factor type records for the system. The risk factor type records are used to populate the risk factor type drop down list on the risk factors base table. The type is also used in creating the assessment records for a Client. On the assessment page WIC Codes (Risk Factors) will be displayed in the type that they are linked too.



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 268: Risk Factor Types Base Table

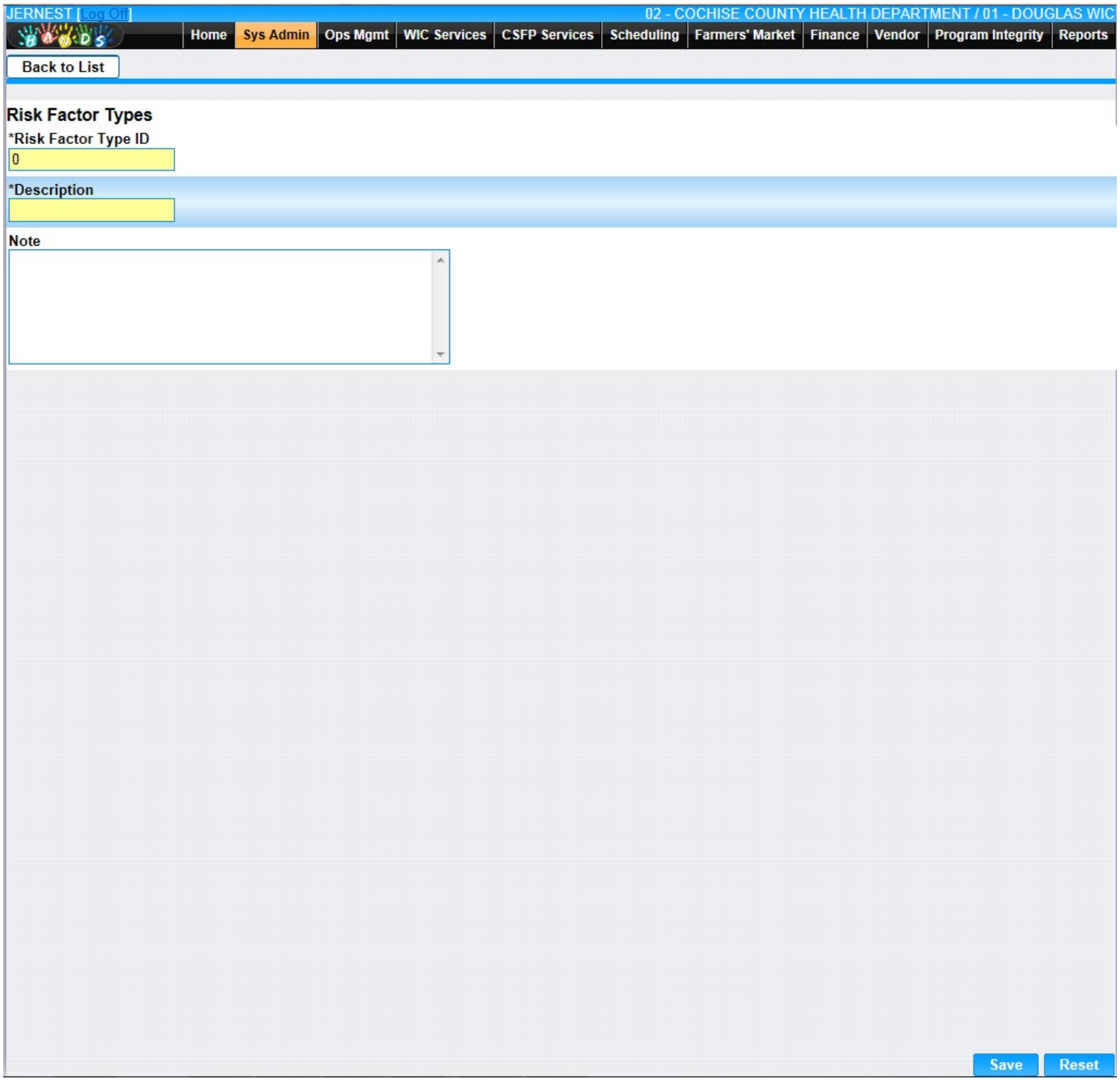


Figure 269: Add a Risk Factor Type Record

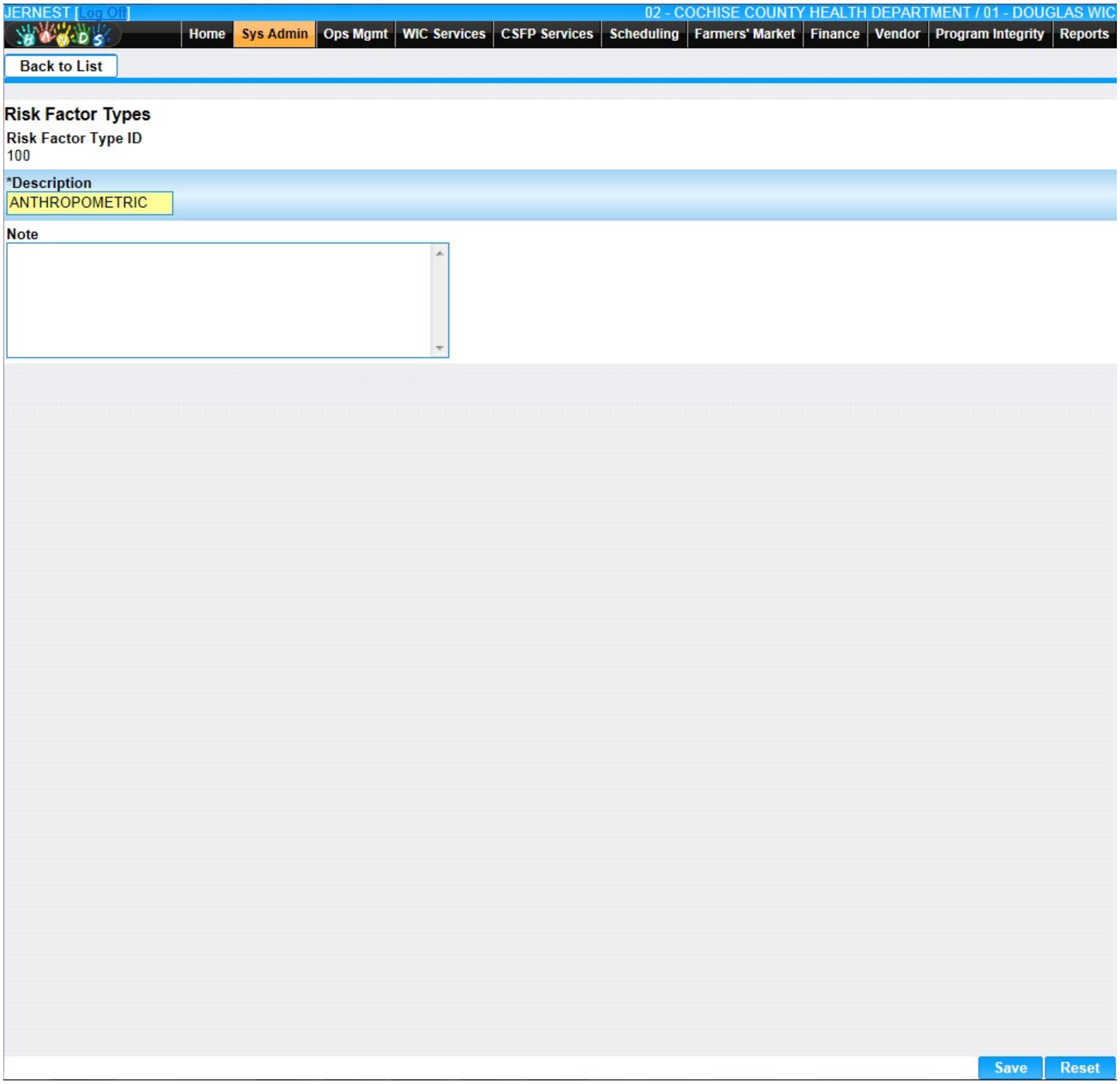


Figure 270: Edit a Risk Factor Type Record

Fields:

- **Risk Factor Type Code –** The unique user assigned code for the risk factor type record. This field is mandatory and accepts a maximum of four numeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the risk factor type record. This field is mandatory and accepts up to 60 alphanumeric / special characters.

Calculations: None

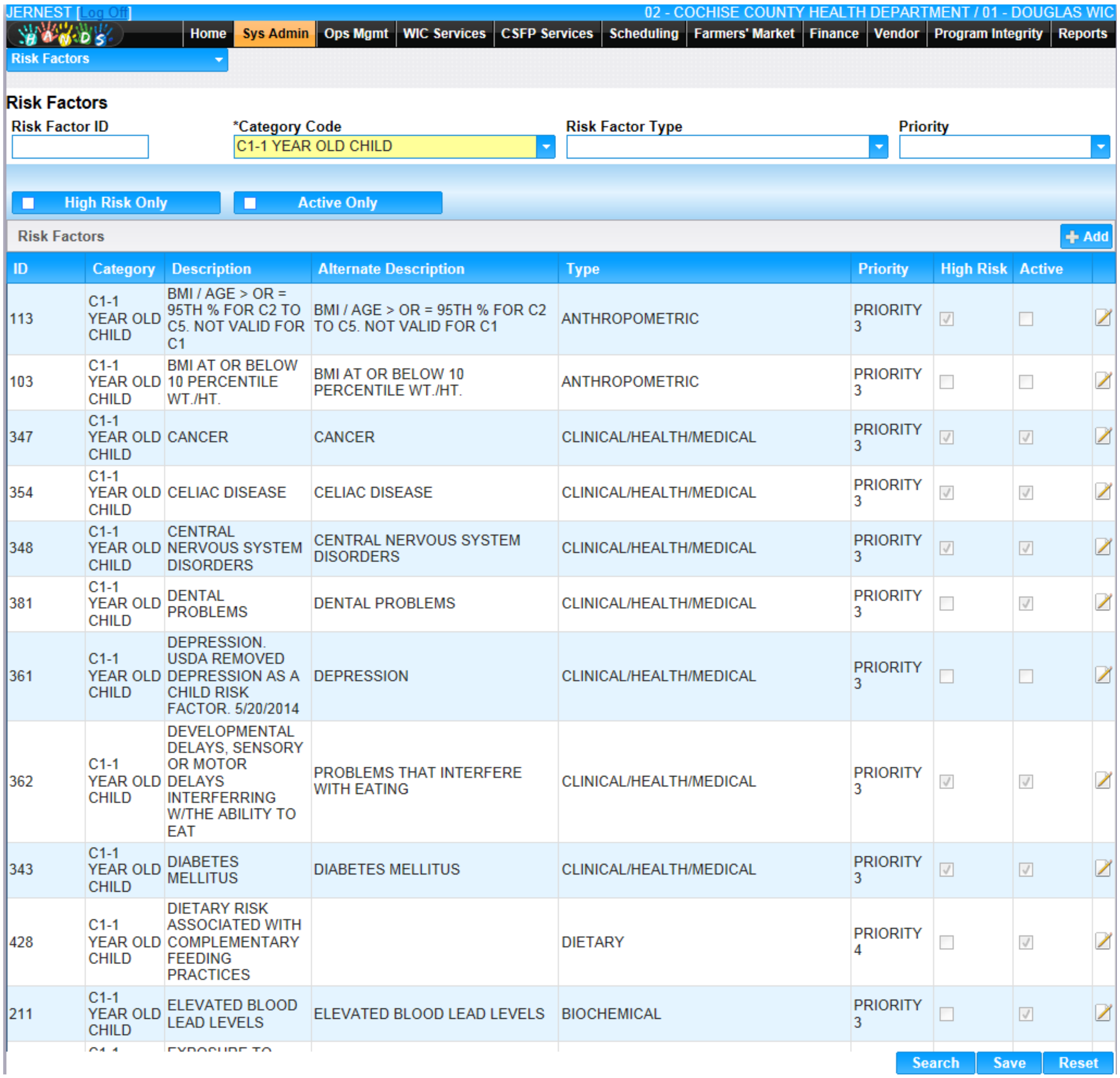
Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple risk factor type records so that they have the same risk factor type code.

16.26 Risk Factors (WIC Codes)

Narrative:

The purpose of this page is to add and maintain risk factor type records for the system. The risk factor type records are used to populate the type field on the risk factors base table. The type is also used in creating the assessment records for a Client. On the assessment page WIC Codes (Risk Factors) will be displayed in the type that they are linked too.



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	☑	☐
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	☐	☐
347	C1-1 YEAR OLD CHILD	CANCER	CANCER	CLINICAL/HEALTH/MEDICAL	PRIORITY 3	☑	☑
354	C1-1 YEAR OLD CHILD	CELIAC DISEASE	CELIAC DISEASE	CLINICAL/HEALTH/MEDICAL	PRIORITY 3	☑	☑
348	C1-1 YEAR OLD CHILD	CENTRAL NERVOUS SYSTEM DISORDERS	CENTRAL NERVOUS SYSTEM DISORDERS	CLINICAL/HEALTH/MEDICAL	PRIORITY 3	☑	☑
381	C1-1 YEAR OLD CHILD	DENTAL PROBLEMS	DENTAL PROBLEMS	CLINICAL/HEALTH/MEDICAL	PRIORITY 3	☐	☑
361	C1-1 YEAR OLD CHILD	DEPRESSION. USDA REMOVED DEPRESSION AS A CHILD RISK FACTOR. 5/20/2014	DEPRESSION	CLINICAL/HEALTH/MEDICAL	PRIORITY 3	☐	☐
362	C1-1 YEAR OLD CHILD	DEVELOPMENTAL DELAYS, SENSORY OR MOTOR DELAYS INTERFERRING W/THE ABILITY TO EAT	PROBLEMS THAT INTERFERE WITH EATING	CLINICAL/HEALTH/MEDICAL	PRIORITY 3	☑	☑
343	C1-1 YEAR OLD CHILD	DIABETES MELLITUS	DIABETES MELLITUS	CLINICAL/HEALTH/MEDICAL	PRIORITY 3	☑	☑
428	C1-1 YEAR OLD CHILD	DIETARY RISK ASSOCIATED WITH COMPLEMENTARY FEEDING PRACTICES		DIETARY	PRIORITY 4	☐	☑
211	C1-1 YEAR OLD CHILD	ELEVATED BLOOD LEAD LEVELS	ELEVATED BLOOD LEAD LEVELS	BIOCHEMICAL	PRIORITY 3	☐	☑

Figure 271: Risk Factor Base Table

Fields (Search Criteria):

- **Risk Factor ID –** The unique user assigned code for the risk factor (WIC Code) record.
- **Category Code –** The Client Category that the risk factor is linked too. This field defaults to "C1 – 1 Year Old Child" and is selected from a drop down list. The drop down list is populated with data populated in the Categories base table. Data must be entered in this field in order to run a search.
- **Risk Factor Type –** The risk factor type for the risk factor record. The drop down list is populated with data populated in the risk factor type base table.
- **Priority –** The priority of the risk factor. The drop down list is populated with data populated in the priority base table.

NOTE: The above fields are used to filter the risk factor base table so that only records matching the entered search criteria will be displayed.

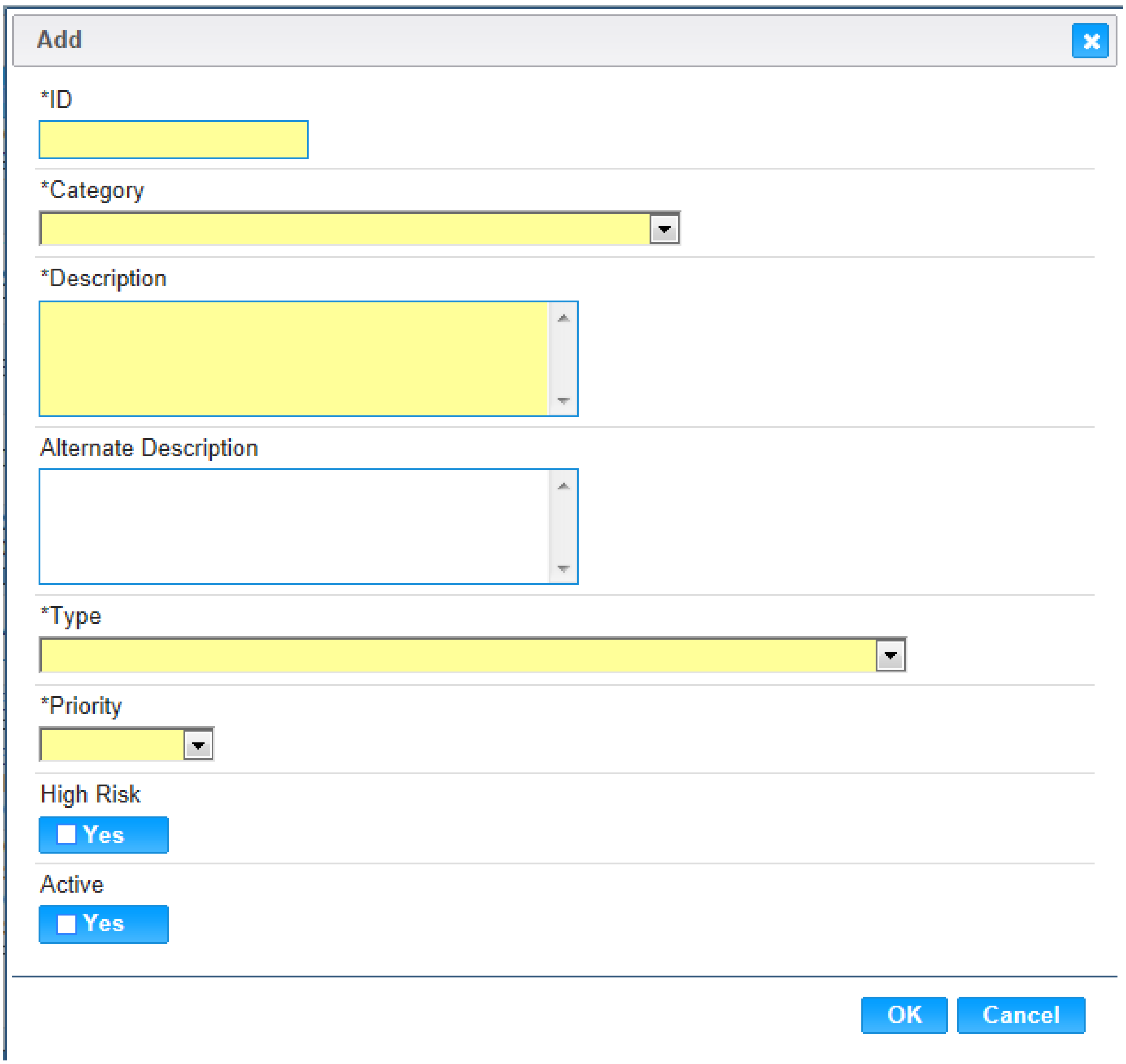


Figure 272: Add a Risk Factor Record

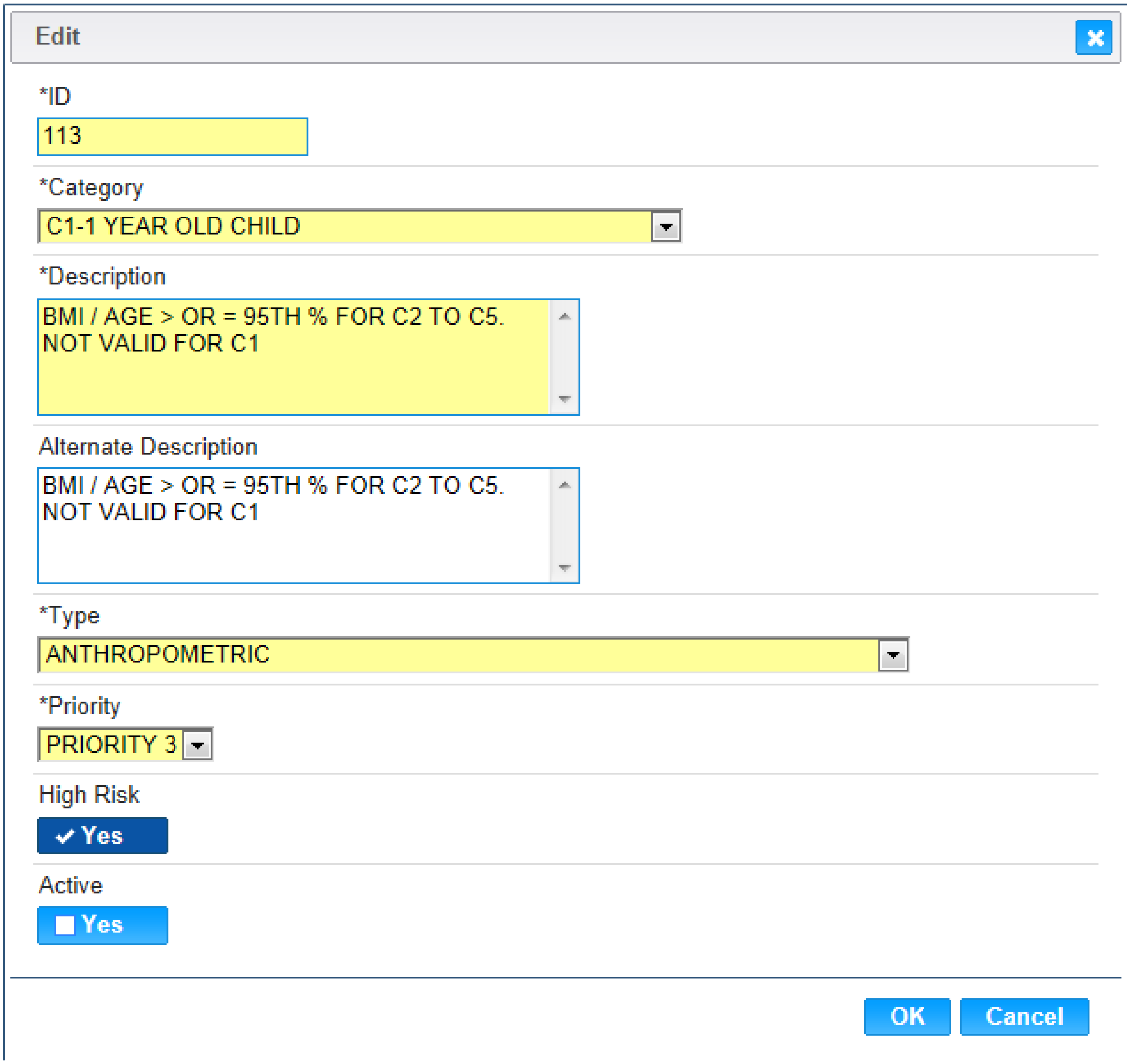


Figure 273: Edit a Risk Factor Record

Fields:

- **ID –** The unique user assigned code for the risk factor (WIC Code) record. This field is mandatory and accepts a maximum of eight alphanumeric characters.
- **Category –** The Client category that the risk factor is assigned to. This field is mandatory and selected from a drop down list. The drop down list is populated with data populated in the Categories base table.
- **Description –** A free form text field that is displayed to describe the risk factor. This field is mandatory and accepts up to 180 alphanumeric / special characters.
- **Alternate Description –** A free form text field that is displayed to further describe the risk factor. This field is optional and accepts up to 500 alphanumeric / special characters.
- **Type –** The risk factor type for the risk factor record. This field is mandatory and selected from a drop down list. The drop down list is populated with data populated in the risk factor type base table.

- **Priority –** The priority of the risk factor record. This field is mandatory and selected from a drop down list. The drop down list is populated with data populated in the priority base table.
- **High Risk –** A checkbox used to determine if the risk factor record will flag the Client as being high risk or not when it has been assigned. If the checkbox is checked the risk factor will be considered high risk and flag the Client as being high risk. If the checkbox is unchecked the risk factor will not be considered high risk and the Client will not be flagged as being high risk.
- **Active –** A checkbox to determine if the risk factor record is active or not. If the risk factor is not active it will not be displayed for user selection. If the checkbox is checked then the risk factor will be considered active. If the checkbox is unchecked, then the risk factor will not be considered active.

Calculations: None

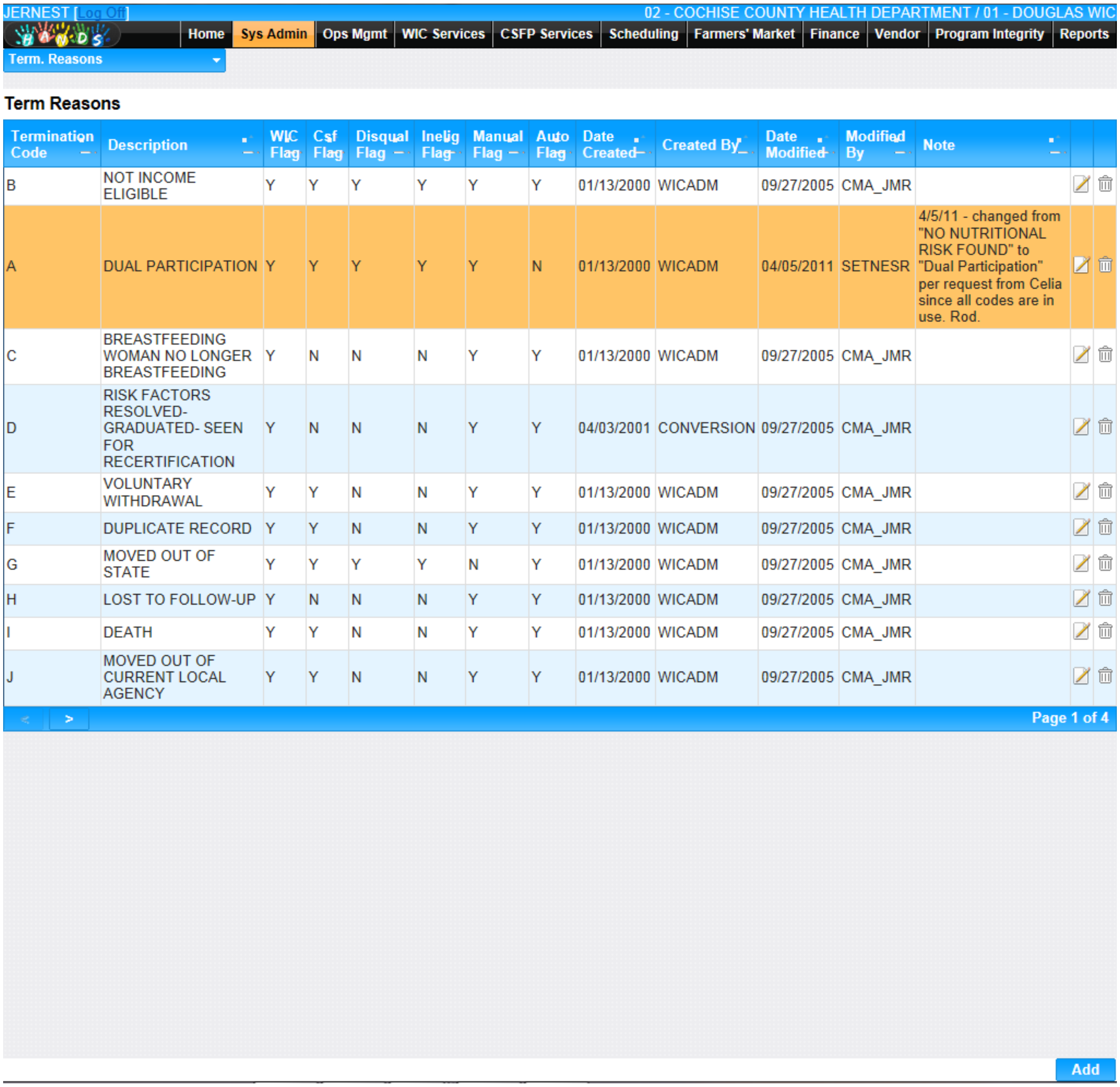
Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple risk factors records so that they have the same risk factor ID and category.

16.27 Term. Reasons

Narrative:

The purpose of this page is to add and maintain termination reason records for the system. The termination reason records displayed in the base table are used on the Certification Action page to populate the termination reason drop down list. Records displayed in this base table are also used to populate the disqualification drop down list along with the ineligibility reason drop down list on the Client Information page.



Termination Code	Description	WIC Flag	Csf Flag	Disqual Flag	Inelig Flag	Manual Flag	Auto Flag	Date Created	Created By	Date Modified	Modified By	Note
B	NOT INCOME ELIGIBLE	Y	Y	Y	Y	Y	Y	01/13/2000	WICADM	09/27/2005	CMA_JMR	
A	DUAL PARTICIPATION	Y	Y	Y	Y	Y	N	01/13/2000	WICADM	04/05/2011	SETNESR	4/5/11 - changed from "NO NUTRITIONAL RISK FOUND" to "Dual Participation" per request from Celia since all codes are in use. Rod.
C	BREASTFEEDING WOMAN NO LONGER BREASTFEEDING	Y	N	N	N	Y	Y	01/13/2000	WICADM	09/27/2005	CMA_JMR	
D	RISK FACTORS RESOLVED- GRADUATED- SEEN FOR RECERTIFICATION	Y	N	N	N	Y	Y	04/03/2001	CONVERSION	09/27/2005	CMA_JMR	
E	VOLUNTARY WITHDRAWAL	Y	Y	N	N	Y	Y	01/13/2000	WICADM	09/27/2005	CMA_JMR	
F	DUPLICATE RECORD	Y	Y	N	N	Y	Y	01/13/2000	WICADM	09/27/2005	CMA_JMR	
G	MOVED OUT OF STATE	Y	Y	Y	Y	N	Y	01/13/2000	WICADM	09/27/2005	CMA_JMR	
H	LOST TO FOLLOW-UP	Y	N	N	N	Y	Y	01/13/2000	WICADM	09/27/2005	CMA_JMR	
I	DEATH	Y	Y	N	N	Y	Y	01/13/2000	WICADM	09/27/2005	CMA_JMR	
J	MOVED OUT OF CURRENT LOCAL AGENCY	Y	Y	N	N	Y	Y	01/13/2000	WICADM	09/27/2005	CMA_JMR	

Figure 274: Termination Reasons Base Table

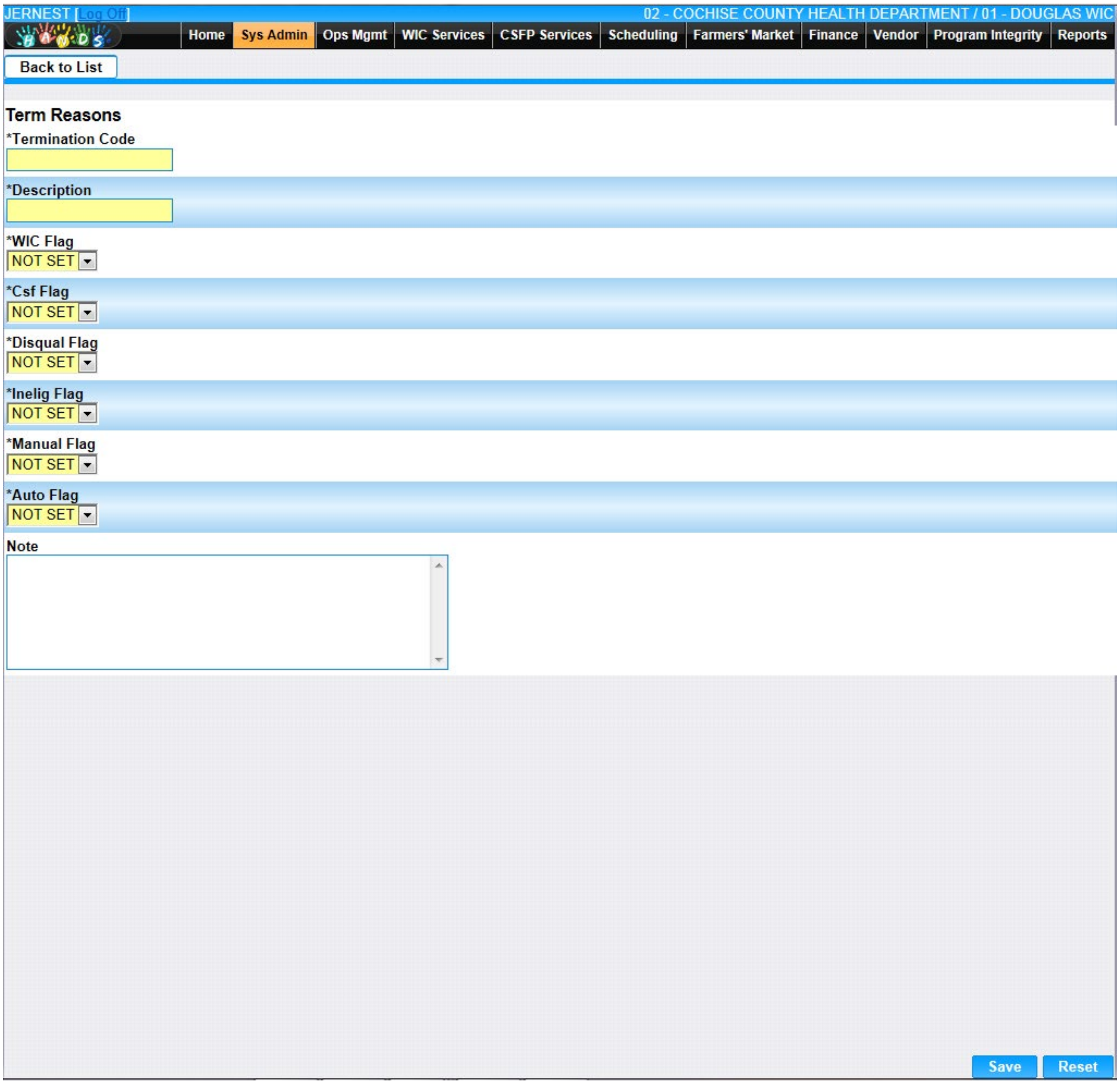


Figure 275: Add a Termination Reason Record

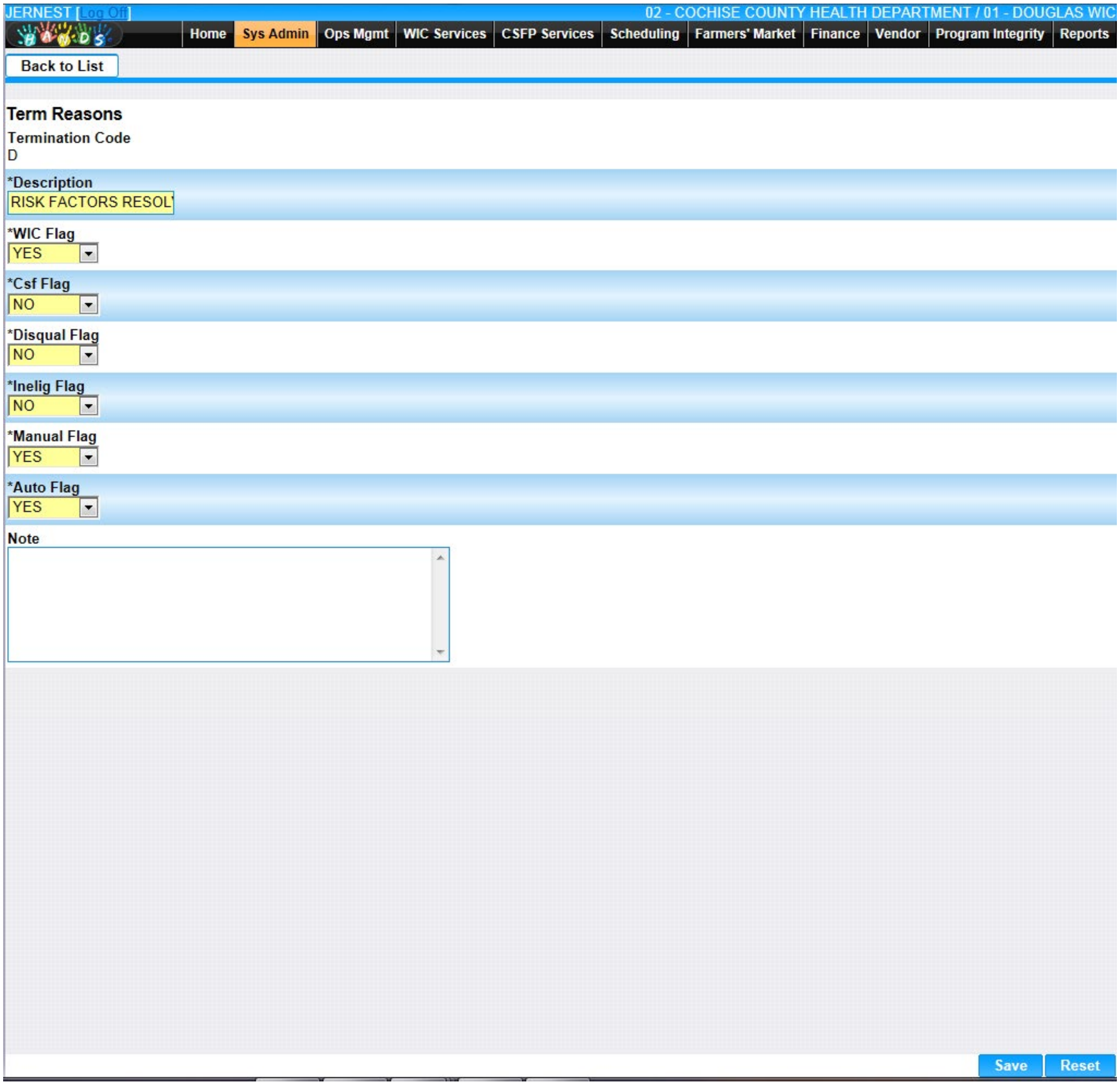


Figure 276: Edit a Termination Reason Record

Fields:

- **Termination Code –** The unique user assigned code for the termination reason record. This field is mandatory and accepts a max of one alphanumeric character; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the termination reason. This field is mandatory and accepts up to 60 alphanumeric / special characters.
- **WIC Flag –** A drop down list used to determine if the termination reason record should be displayed in the drop down lists when within the WIC Services module. If the Yes option is selected, then the termination reason will display in the WIC Services module. If the No option is selected, then the termination reason will not display in the WIC Services module. This field is mandatory.

- **CSF Flag –** A drop down list used to determine if the termination reason record should be displayed in the drop down lists when within the CSFP Services module. If the Yes option is selected, then the termination reason will display in the CSFP Services module. If the No option is selected, then the termination reason will not display in the CSFP Services module. This field is mandatory.
- **Disqual Flag –** A drop down list used to determine if the termination reason record should be displayed in the disqualification reason drop down list. If the Yes option is selected, then the termination reason will display in the disqualification reason drop down list. If the No option is selected, then the termination reason will not display in the disqualification drop down list. This field is mandatory.
- **Inelig Flag –** A drop down list used to determine if the termination reason record should be displayed in the ineligibility reason drop down list. If the Yes option is selected, then the termination reason will display in the ineligibility reason drop down list. If the No option is selected, then the termination reason will not display in the ineligibility reason drop down list. This field is mandatory.
- **Manual Flag –** A drop down list used to determine if the termination reason can be manually assigned or not. If the Yes option is selected, then the termination reason can be manually assigned by a user. If the No option is selected, then the termination reason cannot be manually assigned by a user. The user will not be allowed to select/save a termination reason that has the manual flag set to no. This field is mandatory.
- **Auto Flag –** A drop down list used to determine if the termination reason is automatically assigned or not. If the Yes option is selected, then the termination reason is automatically assigned to a Client by the system. If the No option is selected, then the termination reason is not automatically assigned to a Client by the system. The user will not be allowed to select/save a termination reason that has the automatic flag set to yes. This field is mandatory.

Calculations: None

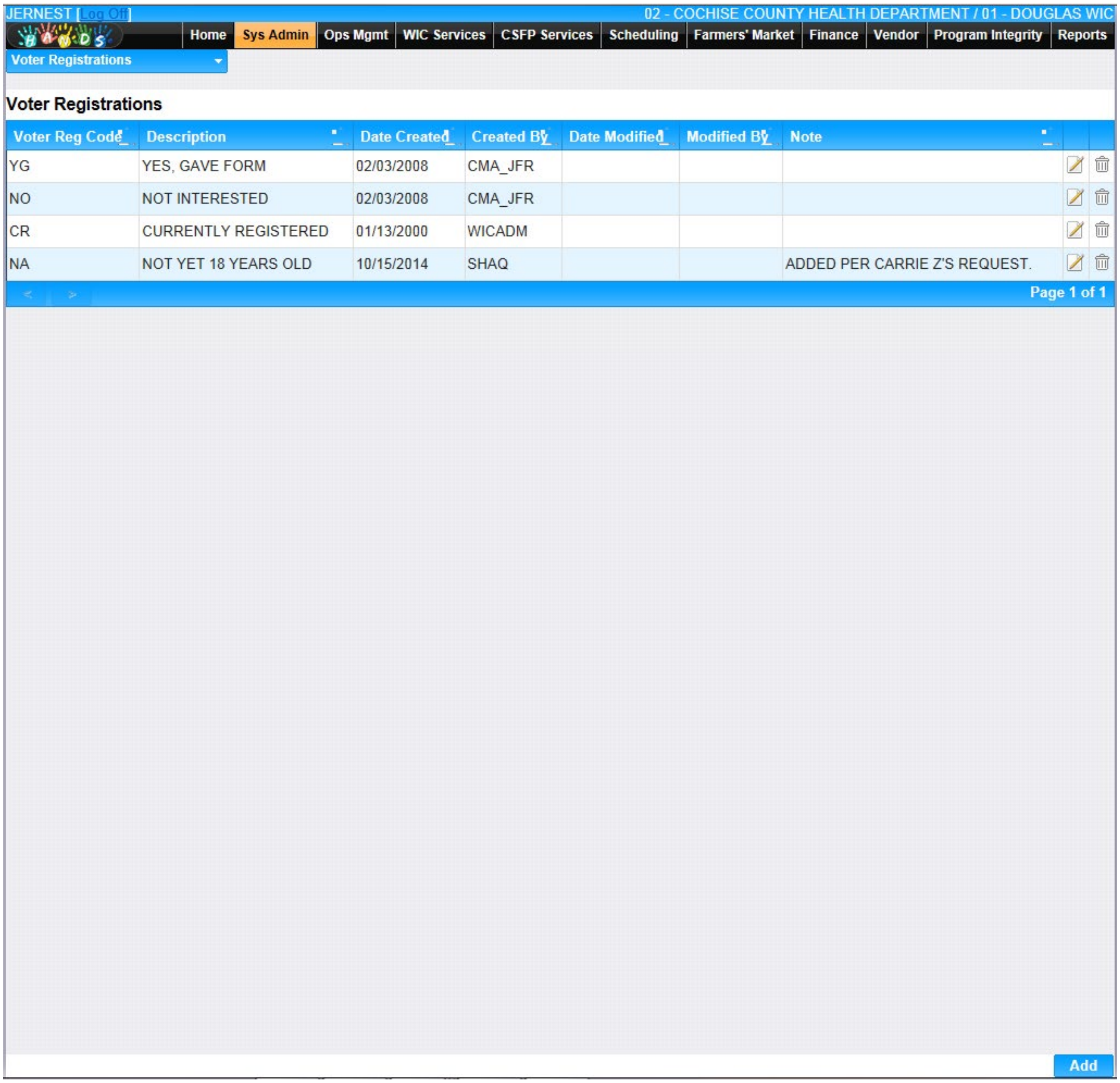
Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple termination reason records so that they have the same termination code.

16.28 Voter Registrations

Narrative:

The purpose of this page is to add and maintain voter registration records for the system. The voter registration records displayed in the base table are used on the Family Information page to populate the voter registration drop down list.



Voter Reg Code	Description	Date Created	Created By	Date Modified	Modified By	Note
YG	YES, GAVE FORM	02/03/2008	CMA_JFR			
NO	NOT INTERESTED	02/03/2008	CMA_JFR			
CR	CURRENTLY REGISTERED	01/13/2000	WICADM			
NA	NOT YET 18 YEARS OLD	10/15/2014	SHAQ			ADDED PER CARRIE Z'S REQUEST.

Figure 277: Voter Registration Base Table

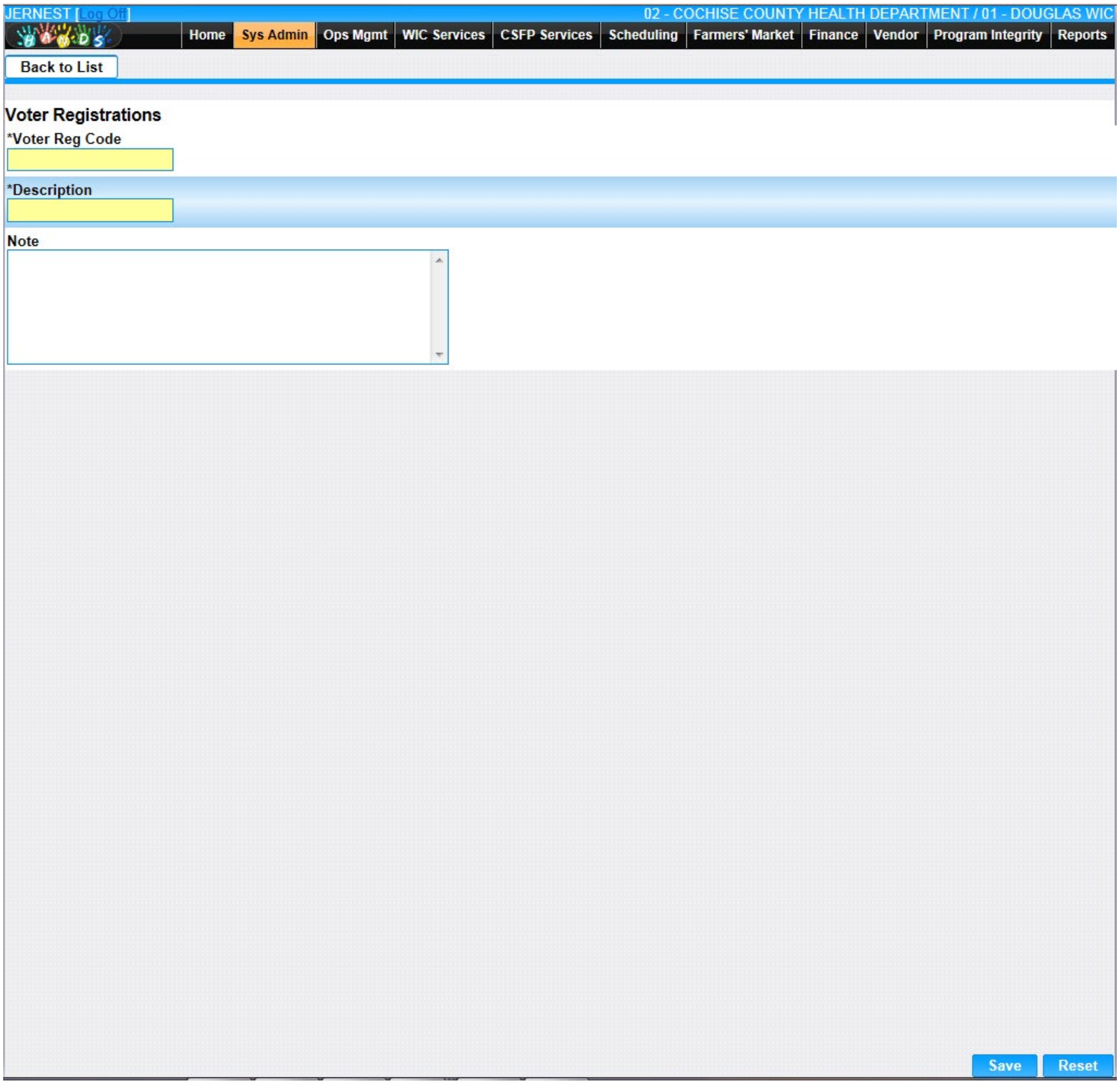


Figure 278: Add a Voter Registration Record

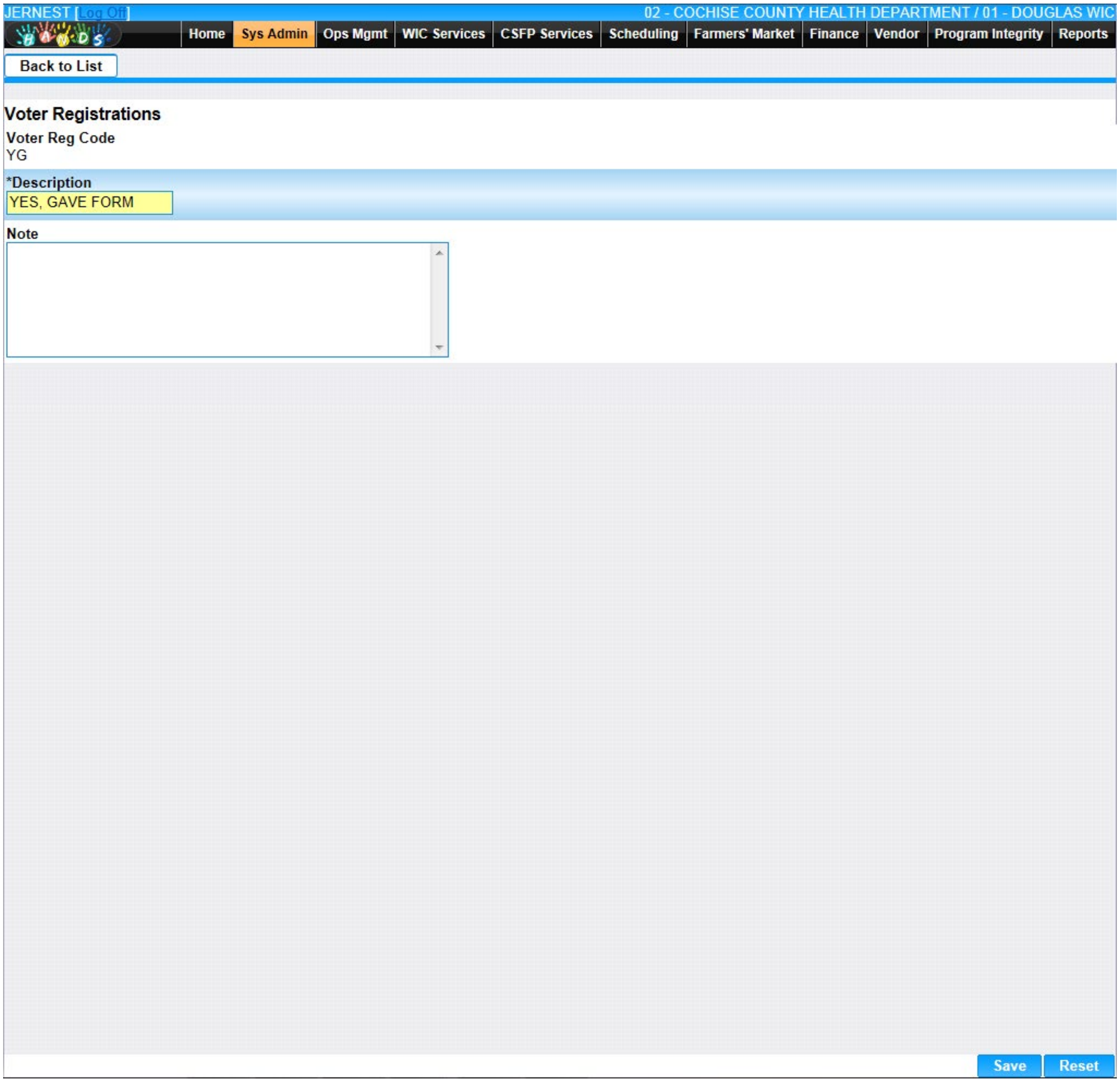


Figure 279: Edit a Voter Registration Record

Fields:

- **Voter Reg Code –** The unique user assigned code for the voter registration record. This field is mandatory and accepts a max of two alphanumeric characters; duplicates are not allowed. This field cannot be edited once the record has been saved.
- **Description –** A free form text field that is displayed to describe the voter registration record. This field is mandatory and accepts up to 60 alphanumeric / special characters.

Calculations: None

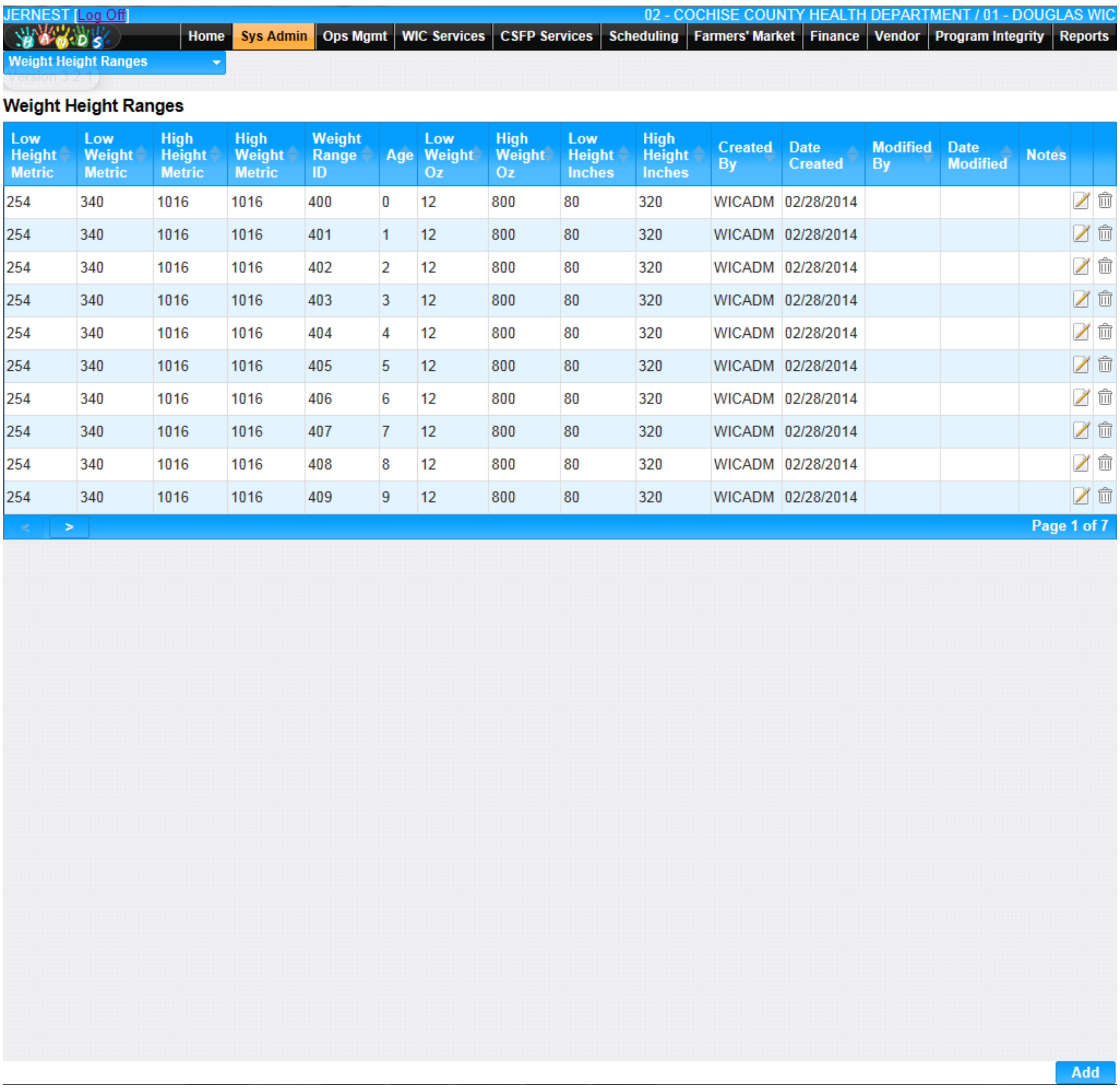
Background Processes:

1) An error message will be displayed on the page and the save process will be stopped if the user attempts to create or modify multiple voter registration records so that they have the same voter reg code.

16.29 Weight Height Ranges

Narrative:

The purpose of this page is to add and maintain weight height range records for the system. The weight height range records displayed in the base table are used for data entry validation for the anthropometric records being added to the system. If the entered anthropometric data entered for a Client is outside the weight height range record relative to the Client's age an error message will be displayed when the user is attempting to save the data for the Client.



Low Height Metric	Low Weight Metric	High Height Metric	High Weight Metric	Weight Range ID	Age	Low Weight Oz	High Weight Oz	Low Height Inches	High Height Inches	Created By	Date Created	Modified By	Date Modified	Notes
254	340	1016	1016	400	0	12	800	80	320	WICADM	02/28/2014			
254	340	1016	1016	401	1	12	800	80	320	WICADM	02/28/2014			
254	340	1016	1016	402	2	12	800	80	320	WICADM	02/28/2014			
254	340	1016	1016	403	3	12	800	80	320	WICADM	02/28/2014			
254	340	1016	1016	404	4	12	800	80	320	WICADM	02/28/2014			
254	340	1016	1016	405	5	12	800	80	320	WICADM	02/28/2014			
254	340	1016	1016	406	6	12	800	80	320	WICADM	02/28/2014			
254	340	1016	1016	407	7	12	800	80	320	WICADM	02/28/2014			
254	340	1016	1016	408	8	12	800	80	320	WICADM	02/28/2014			
254	340	1016	1016	409	9	12	800	80	320	WICADM	02/28/2014			

Figure 280: Weight Height Ranges Base Table

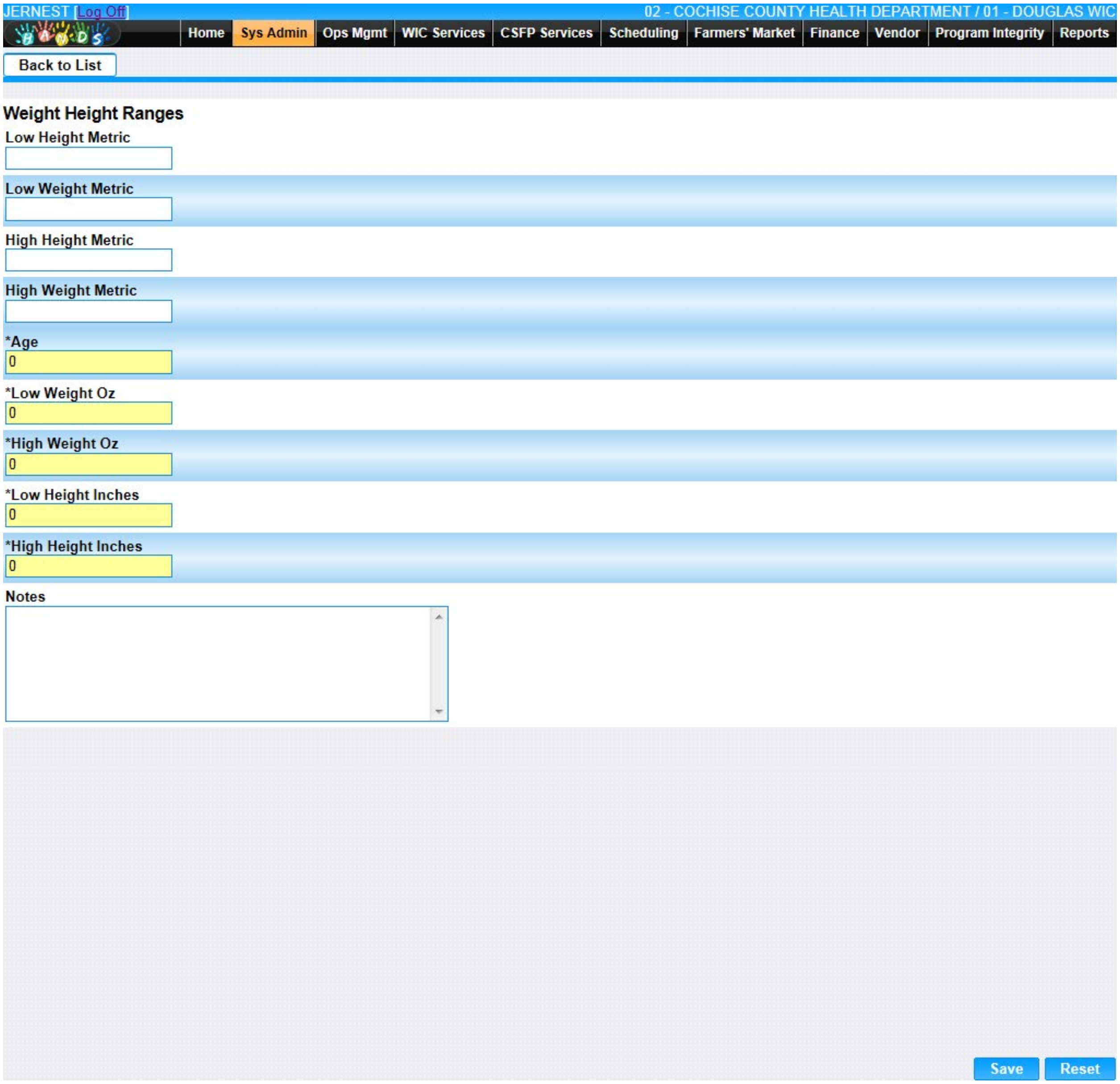


Figure 281: Add a Weight Height Range Record

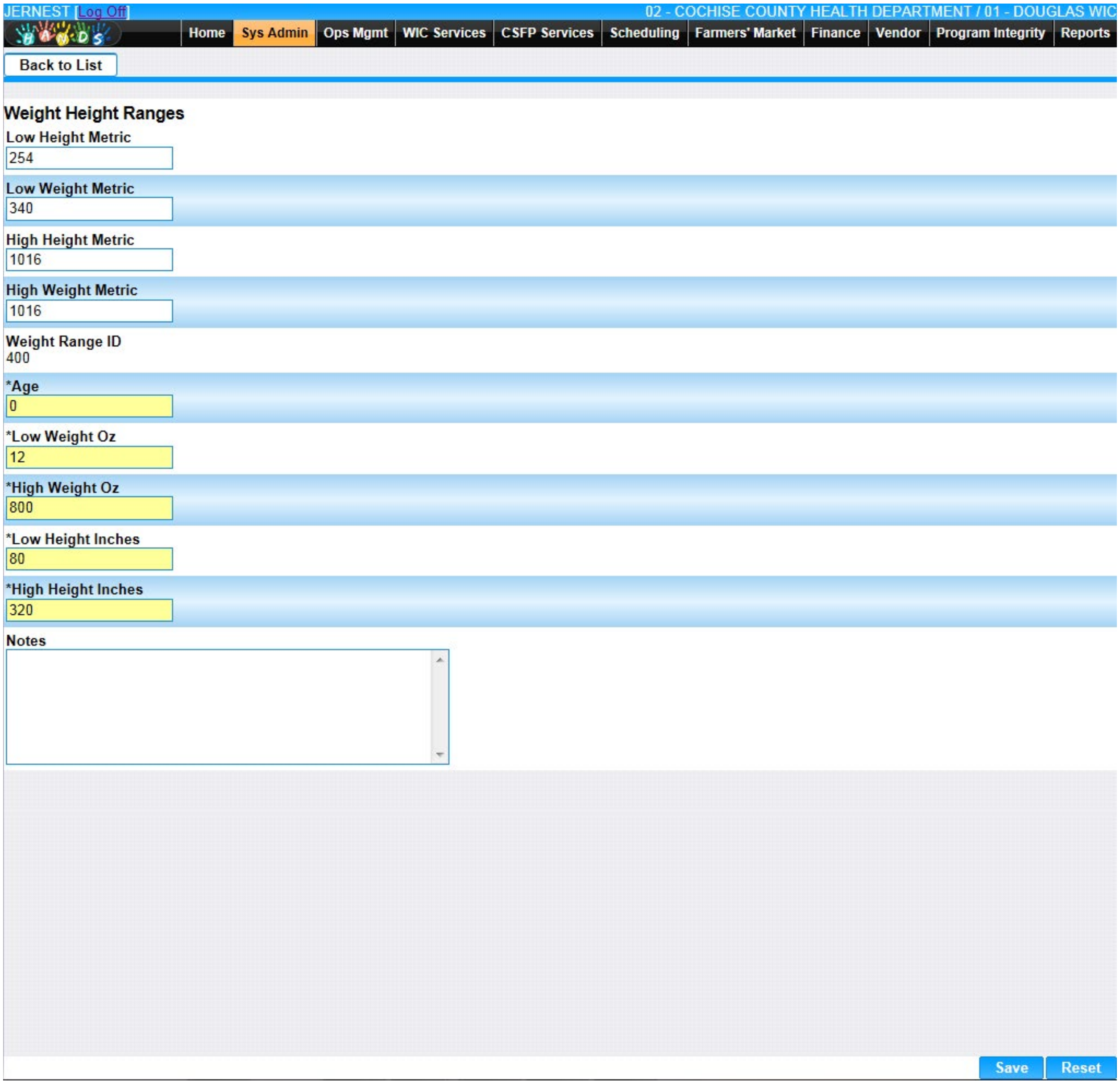


Figure 282: Edit a Weight Height Range Record

Fields:

- **Low Height Metric –** The low height value in metric units for the weight height range record. This field is optional and only accepts a maximum of 6 numeric characters followed by 8 decimal points.
- **Low Weight Metric –** The low weight value in metric units for the weight height range record. This field is optional and only accepts a maximum of 6 numeric characters followed by 8 decimal points.
- **High Height Metric –** The high height value in metric units for the weight height range record. This field is optional and only accepts a maximum of 6 numeric characters followed by 8 decimal points.

- **High Weight Metric –** The high weight value in metric units for the weight height range record. This field is optional and only accepts a maximum of 6 numeric characters followed by 8 decimal points.
- **Age –** The age to be used in the weight height range validation. This field is mandatory and only accepts a maximum of two numeric characters. This field cannot be edited after the record is saved.
- **Low Weight Oz –** The low weight value in ounces for the weight height range record. This field is mandatory and only accepts a maximum of 5 numeric characters followed by 1 decimal points.
- **High Weight Oz –** The high weight value in ounces for the weight height range record. This field is mandatory and only accepts a maximum of 5 numeric characters followed by 1 decimal points.
- **Low Height Inches –** The low height value in inches for the weight height range record. This field is mandatory and only accepts a maximum of 5 numeric characters followed by 1 decimal points.
- **High Height Inches –** The high height value in inches for the weight height range record. This field is mandatory and only accepts a maximum of 5 numeric characters followed by 1 decimal points.

Calculations: None

Background Processes: None