



Arizona Department of Health Services  
Bureau of Nutrition and Physical Activity  
HANDS WIC System

Vendor Management  
Detailed Functional Design Document  
Version 2.2



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## REVISION HISTORY

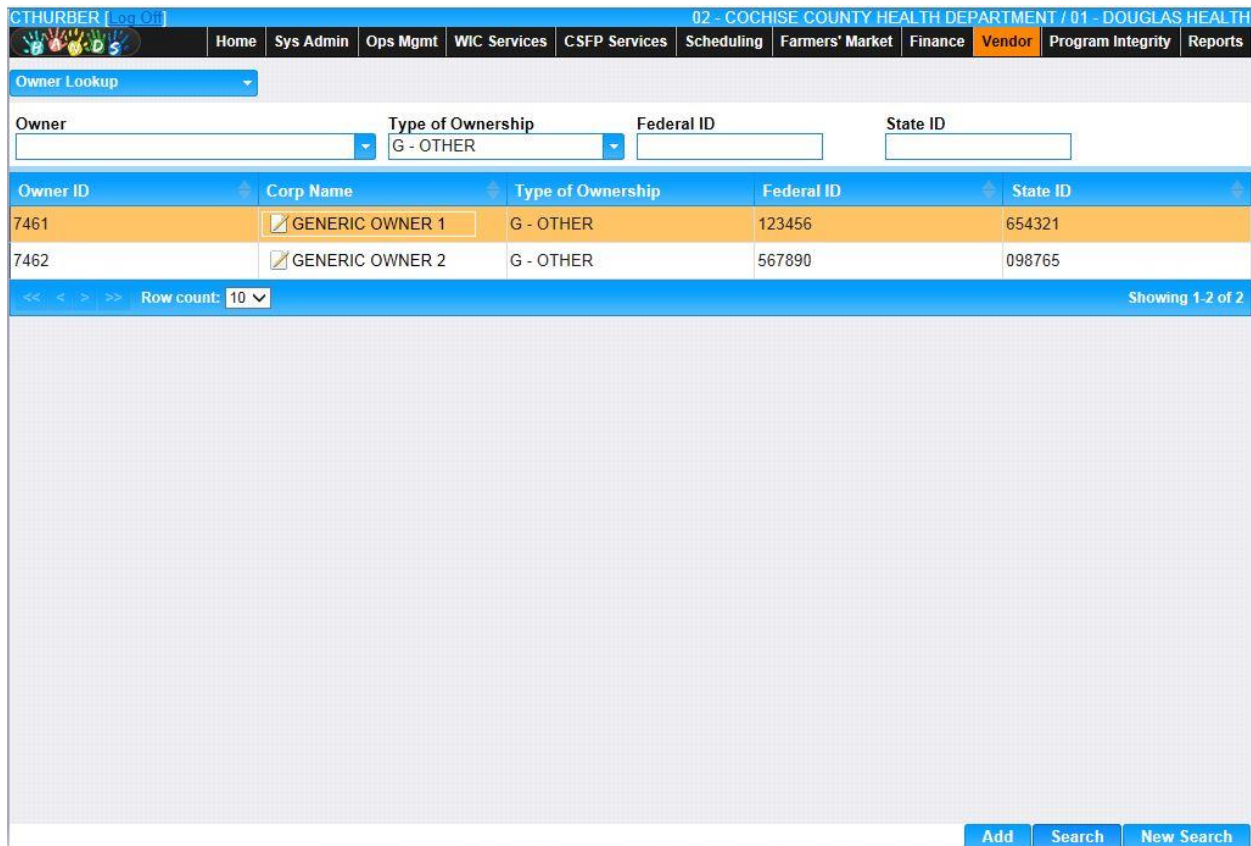
The chart below indicates revisions made to this document:

<b>Version</b>	<b>Name</b>	<b>Brief Description of Change</b>	<b>Published</b>
1.0	Cheryl Thurber	Initial Draft	11-04-2014
	David Reisinger	Review	02-26-2015
2.0	Joey Freitas	Updates to include eWIC functionality	8-28-2017
2.1	Alex Hart	Updates to include Peer Group updates (CR61129). Includes updates to the CR61129 impacting MARL.	6-7-2018
2.2	Sumamalini Vedantham	Updates to include Sept 2019 Release and Document Refresh overhaul	11-26-2019



## 1 OWNER LOOKUP

The purpose of this page is to allow the user to search for existing Owners within the HANDS system. The user can enter a single search parameter, or a combination of parameters to narrow their search. Once a search is performed, the results are displayed within the Result Grid. The desired Owner information can be edited from the Result Grid by clicking the  (**Edit Icon**) located next to the Corporation Name. Grid columns are sortable by ascending or descending order by pressing the up or down arrows at the right of the column label. The user can also add a new Owner to the HANDS system by clicking on the blue Add button. The Figure below depicts the initial Owner Lookup Search page.

*Navigation Path: Vendor Menu | Owner Lookup or Vendor tab | Navigation | Owner Lookup*



The screenshot shows the 'Owner Lookup' page in a web application. At the top, there is a navigation bar with the user 'CTHURBER' and the department '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH'. Below this is a menu with options like Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. The 'Owner Lookup' section has a search form with fields for 'Owner', 'Type of Ownership' (set to 'G - OTHER'), 'Federal ID', and 'State ID'. Below the search form is a table with the following data:

Owner ID	Corp Name	Type of Ownership	Federal ID	State ID
7461	 GENERIC OWNER 1	G - OTHER	123456	654321
7462	 GENERIC OWNER 2	G - OTHER	567890	098765

At the bottom of the table, there is a 'Row count: 10' dropdown and a 'Showing 1-2 of 2' indicator. At the very bottom of the page, there are three buttons: 'Add', 'Search', and 'New Search'.

*Figure: Owner Lookup Page with Results*


### Search Fields:

- **Owner** – The user can enter the Corporation Name or Owner ID (a system generated numeric value used to uniquely identify each Owner) to search for, either value is accepted to perform the search. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is optional.
- **Type of Ownership** – This field indicates if the Ownership is a single proprietorship, partnership, corporation, or other category. The Type of Ownership can be entered

manually to perform the search. Alternatively, the user can enter the system assigned character Type Code to perform the search. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. This field is optional.

- **Federal ID** – The user can search based on the Owner’s Federal ID. The Owner’s Federal Employee Number (if a corporation) or Social Security Number (if a sole proprietorship). This field is optional.
- **State ID** – The user can search based on the Owner’s State Sales Tax Number. This field is optional.

*Search Result Grid fields:*

- **Owner ID** – The Owner ID is a system generated numeric value used to uniquely identify each Owner within the HANDS system. This value can be used to Search using the Owner search field. This field is display only.
- **Corp Name** – The name of the Owner. This value can be used to Search using the Owner search field. This field is display only.
  -  **(Edit Icon)** – Once a record has been added, the Edit Icon will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
- **Type of Ownership** – This field indicates if the Ownership is a single proprietorship, partnership, corporation, or other category. This value can be used to Search using the Type of Ownership search field. This field is display only.
- **Federal ID** – The Owner’s Federal Employee Number (if a corporation) or Social Security Number (if a sole proprietorship). This value can be used to Search using the Federal ID search field. This field is display only.
- **State ID** – The Owner’s State Sales Tax Number. This value can be used to Search using the State ID search field. This field is display only.

*Buttons:*

- **Add** – Press this button to add a new Owner to the HANDS system.
- **Search** – Press this button to perform a search with the search criteria entered.
- **New Search** – Press this button to clear search criteria entered and search results retrieved.

*Calculation(s):* None

*Background Process(es):*

- 1) Search is performed for matching records based on criteria entered. Search output appears in the Result Grid.
- 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.

## 1.1 Owner Add

The Add button allows the user to enter Owner information such as the associated Addresses, Bank Information, Phone Number, and Officer Information. Once information is entered and successfully saved using the Add page, the information becomes searchable on the Owner Lookup page. See the Figure below for the initial Add screen for Owner.

Navigation Path: Owner Lookup / Add Button

Figure: Owner Add Page

### Fields:

- **Corp Name** – The name of the Owner. This field accepts alphanumeric and special characters. This field is mandatory.
- **Federal ID** – The Owner’s Federal Employee Number (if a corporation) or Social Security Number (if a sole proprietorship). This field is 9 characters in length and can contain alphanumeric and special characters. This field is optional.
- **State ID** – The Owner’s State Sales Tax Number. This field is 9 characters in length and can contain alphanumeric and special characters. This field is mandatory.
- **Type of Ownership** – This field indicates if the Ownership is a single proprietorship, partnership or corporation. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling






through the list. Alternatively, the user can enter the assigned character Type Code, which will also show possible completions for Type of Ownership. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | Vendor Base Tables for Owner Types. This field is mandatory.

- **Group Code** – An alternate identification code for an Owner, taken from the previous AZ WIC system. This field is 3 characters in length and can contain alphanumeric and special characters. This code is optional.
- **Street Address:**
  - **Address 1** – The first of two Street Address fields available for the Owner’s street address. The Street Address 1 allows alphanumeric and special characters. This field is mandatory.
  - **Address 2** – The second of two Street Address fields available for the Owner’s street address. The Street Address 2 allows alphanumeric and special characters. This field is optional.
  - **City, State, ZIP Code, and County** – The Street City, State, ZIP Code, and County portion of the Owner Address. Any portion of this field (i.e. State or ZIP Code) can be manually entered for this field. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is mandatory.
- **Mailing Address:**
  - **Address 1** – The first of two Mailing Address fields available for the Owner’s mailing address. The Mailing Address 1 allows alphanumeric and special characters. This field is mandatory.
  - **Address 2** – The second of two Mailing Address fields available for the Owner’s mailing address. The Mailing Address 2 allows alphanumeric and special characters. This field is optional.
  - **City, State, ZIP Code, and County** – The Mailing City, State, ZIP Code, and County portion of the Owner Mailing Address. Any portion of this field (i.e. State or ZIP Code) can be manually entered for this field. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is mandatory.
- **Bank Information:**
  - **Bank Name** – The name of the financial institution used by the Owner. This field can be manually entered, or chosen from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. If an unknown value is entered, the message, “Value not found” will be displayed. This field is optional.
  - **Account Number** – The account number for the financial institution indicated. The Bank Account must be an alphanumeric value with a maximum length of 17. This field is required only if a Bank Name has been selected.
  - **Federal ID** – The Federal Identification of the financial institution. The Federal ID is automatically populated when a Bank Name is present. This field is display only.
  - **Routing Number** – The Routing Number used by the Federal Reserve System to identify the financial institution. The Routing Number is automatically populated when a Bank Name is present. This field is display only.
- **Deposit** – A check box used to indicate to the system if vendor payments should be made to this bank account. If checked, this information will be included in the Vendor Bank

file sent to FSMC during the End of Day (EOD) processing for ACH processing. This check box is optional.




- **Phone Numbers Grid:**

- **Phone Type** – This field indicates the Phone Type of the Phone Number being added, such as Cell, Home, or Work Phone. This field is display only.
- **Phone Number** – This is the Phone Number associated with the Owner. This field is display only.
- **Ext.** – The phone extension of the Owner, if applicable. This field is display only.
-  **(Edit Icon)** – Once a record has been added, the Edit Icon will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
-  **(Delete Icon)** – Once a record has been added, the Delete Icon will be enabled. When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Phone Number will remain in the Phone Number Grid. If Delete button is selected, the record will be removed. By clicking the  **(Close Window)**, the window is closed and no action is taken.

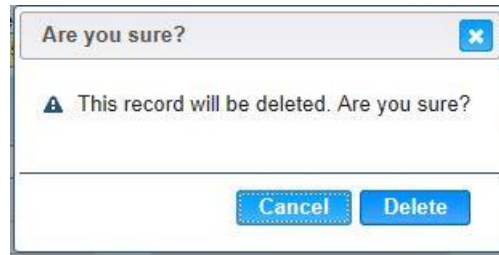
*Note:* The record will not be permanently removed until a Save is performed.





- **Officer Information Grid:**


- **Last Name** – The last name of the Officer. This field is display only.
- **First Name** – The first name of the Officer. This field is display only.
- **MI (Middle Initial)** – The middle initial of the Officer. This field is display only.
- **SSN** – The Social Security Number of the Officer. This field is display only.
- **Date of Birth** – The birth date of the Officer. This field is display only.
- **Start Date** – The starting date for the Officer's authority. This field is display only.
- **End Date** – The ending date for the Officer's authority. This field is display only.
- **Officer Percent Owned** – The numeric percentage of the ownership which the Officer possesses. This field is display only.
-  **(Edit Icon)** – Once a record has been added, the Edit Icon will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
-  **(Delete Icon)** – Once a record has been added, the Delete Icon will be enabled. When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Officer Information will remain in the Officer Information Grid. If Delete button is selected, the record will be removed. By clicking the  **(Close Window)**, the window is closed and no action is taken.


*Note:* The record will not be permanently removed until a Save is performed.

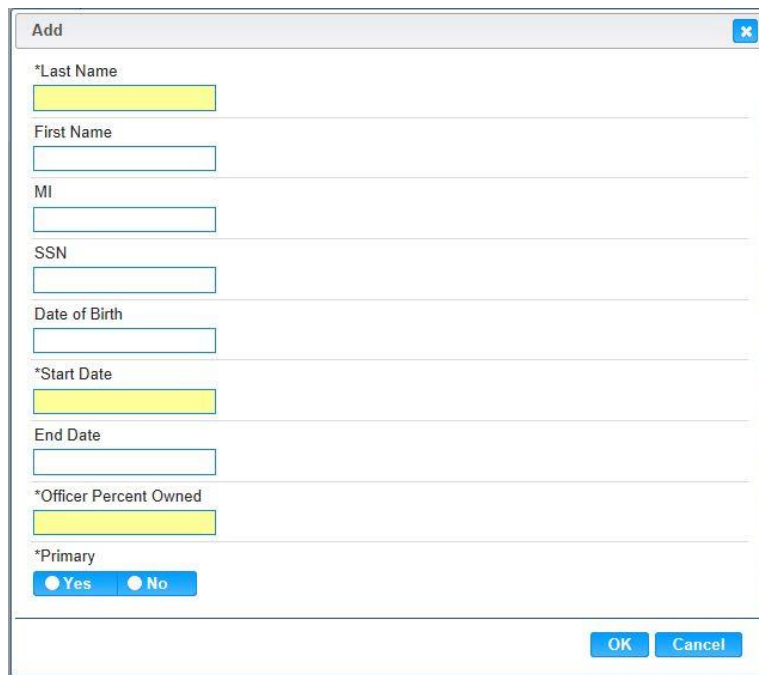


*Buttons:*

- **New Search** – Press this button to go back to the Owner Search page to start a New Search.
-  (**Copy Street To Mailing**) – Clicking of the Copy Street To Mailing button will 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.
- **Save** – Press this button to save the new Owner record.
- **Reset** – Press this button to undo any modifications made to the Owner record since the last Save was performed.
- **Phone Numbers:**
  -  (**Add**) – Press this button to bring up the Add Phone Modal.

-  (**Close Window**) – By clicking this button, the window is closed and no action is taken.
- **Phone Type** – This field indicates the Phone Type of the Phone Number being added, such as Cell, Home, or Work Phone. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the system assigned Phone Type ID, which will also highlight possible completions for Phone Type. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | System Base Tables for Phone Types. This field is mandatory.
- **Phone Number** – This is the Phone Number associated with the Owner. This field must contain 10 numeric digits. The user does not need to input any special formatting, such as parentheses or dash. This field is mandatory.
- **Ext.** – The phone extension of the Owner, if applicable. The Phone Extension must be numeric and contain no more than 5 digits. This field is optional.


- **Priority** – Each Phone Number configured is given a Priority selection option such as Primary, Secondary, or Other. If Phone Numbers are entered, one must be set as Primary. There can be only one Primary Phone Number and one Secondary Phone Number defined. There can be multiple Phone Numbers with priority of Other. A selection is mandatory.
- **OK** – Press this button after all fields are completed.
- **Cancel** – Press this button to close the Add Phone Modal and return to the Owner Edit without saving any Phone Number fields entered.
- **Officer Information:**
  -  **(Add)** – Press this button to bring up the Add Officer Modal.



The screenshot shows a modal window titled "Add" with a close button (X) in the top right corner. The form contains the following fields and controls:

- \*Last Name: Text input field, highlighted in yellow.
- First Name: Text input field.
- MI: Text input field.
- SSN: Text input field.
- Date of Birth: Text input field.
- \*Start Date: Text input field, highlighted in yellow.
- End Date: Text input field.
- \*Officer Percent Owned: Text input field, highlighted in yellow.
- \*Primary: Radio button group with "Yes" selected and "No" unselected.

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

-  **(Close Window)** – By clicking this button, the window is closed and no action is taken.
- **Last Name** – The last name of the Officer. This field allows alphanumeric and special characters. This field is mandatory.
- **First Name** – The first name of the Officer. This field allows alphanumeric and special characters. This field is optional.
- **MI (Middle Initial)** – The middle initial of the Officer. This field allows up to 3 alphanumeric and special characters. This field is optional.
- **SSN** – The Social Security Number of the Officer. The SSN field will only accept exactly 9 numeric characters. This field is optional.
- **Date of Birth** – The birth date of the Officer. The Date of Birth is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Date of Birth. The user may also select the Date of Birth using the provided Calendar which appears when the field is entered. This field is optional.
- **Start Date** – The starting date for the Officer's authority. . The Start Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/)

character when manually entering the Start Date. The user may also select the Start Date using the provided Calendar which appears when the field is entered. This field is mandatory.


- **End Date** – The ending date for the Officer’s authority. . The End Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the End Date. The user may also select the End Date using the provided Calendar which appears when the field is entered. This field is optional, but cannot be entered without a Start Date.
- **Officer Percent Owned** – The numeric percentage of the ownership the Officer possesses. The user does not need to include a percent sign (%). The field Officer Percent Owned must be between 1 and 100. The Percentage Owned for all officers must total 100%.
- **Primary** – Click ‘Yes’ if the officer being entered is the Primary Officer. The choices are Yes or No. Only a single officer may be specified as Primary. A selection is mandatory.
- **OK** – Press this button after all fields are completed.
- **Cancel** – Press this button to close the Add Officer Modal and return to the Owner Edit without saving any Officer fields entered.

*Calculation(s):* None

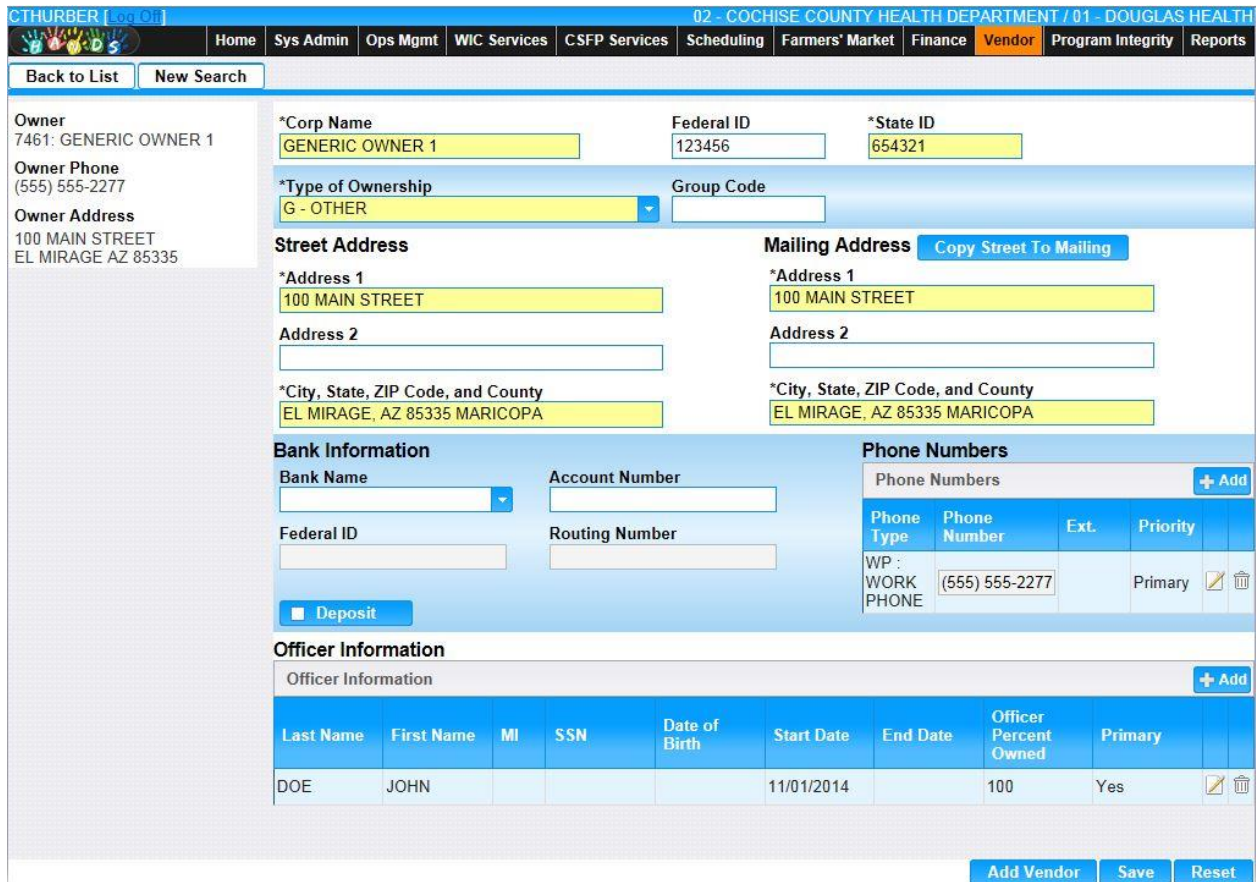
*Background Process(es):*

- 1) By selecting a Bank Name, the Bank Information Federal ID and Routing Number are automatically populated.
- 2) The system performs a four step save process when saving a new Owner:
  - 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 it assigns a numeric system generated Owner ID, which is used to uniquely identify each Owner within the HANDS system.
- 3) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
- 4) The Bank Information is populated under the Sales | Banks as the Owner Bank Information for any associated Vendor.

## 1.2 Owner Edit

The  (**Edit Icon**) allows the user to modify existing Owner information such as the associated Addresses, Bank Information, Phone Number, and Officer Information. The user can also add Vendors for this Owner directly from this page by clicking the Add Vendor button. Once information is updated and successfully saved the Edit page, the updated information becomes searchable on the Owner Lookup page. To the left of the screen, the Active Record denotes basic information regarding the owner. The Edit field definitions are the same as the Add page. See the Figure below for the initial Edit screen for Owner.

Navigation Path: Owner Lookup Search Results / Edit Icon



**Owner**  
7461: GENERIC OWNER 1  
**Owner Phone**  
(555) 555-2277  
**Owner Address**  
100 MAIN STREET  
EL MIRAGE AZ 85335

**\*Corp Name**  
GENERIC OWNER 1  
**Federal ID**  
123456  
**\*State ID**  
654321



**\*Type of Ownership**  
G - OTHER  
**Group Code**

**Street Address**  
**\*Address 1**  
100 MAIN STREET  
**Address 2**  
**\*City, State, ZIP Code, and County**  
EL MIRAGE, AZ 85335 MARICOPA



**Mailing Address** [Copy Street To Mailing](#)  
**\*Address 1**  
100 MAIN STREET  
**Address 2**  
**\*City, State, ZIP Code, and County**  
EL MIRAGE, AZ 85335 MARICOPA

**Bank Information**  
**Bank Name**  
**Account Number**  
**Federal ID**  
**Routing Number**  
[Deposit](#)

**Phone Numbers**  
[+ Add](#)

Phone Type	Phone Number	Ext.	Priority
WP : WORK PHONE	(555) 555-2277		Primary  

**Officer Information** [+ Add](#)

Last Name	First Name	MI	SSN	Date of Birth	Start Date	End Date	Officer Percent Owned	Primary
DOE	JOHN				11/01/2014		100	Yes  

[Add Vendor](#) [Save](#) [Reset](#)

Figure: Owner Edit Page


Calculation(s): None

Background Process(es):

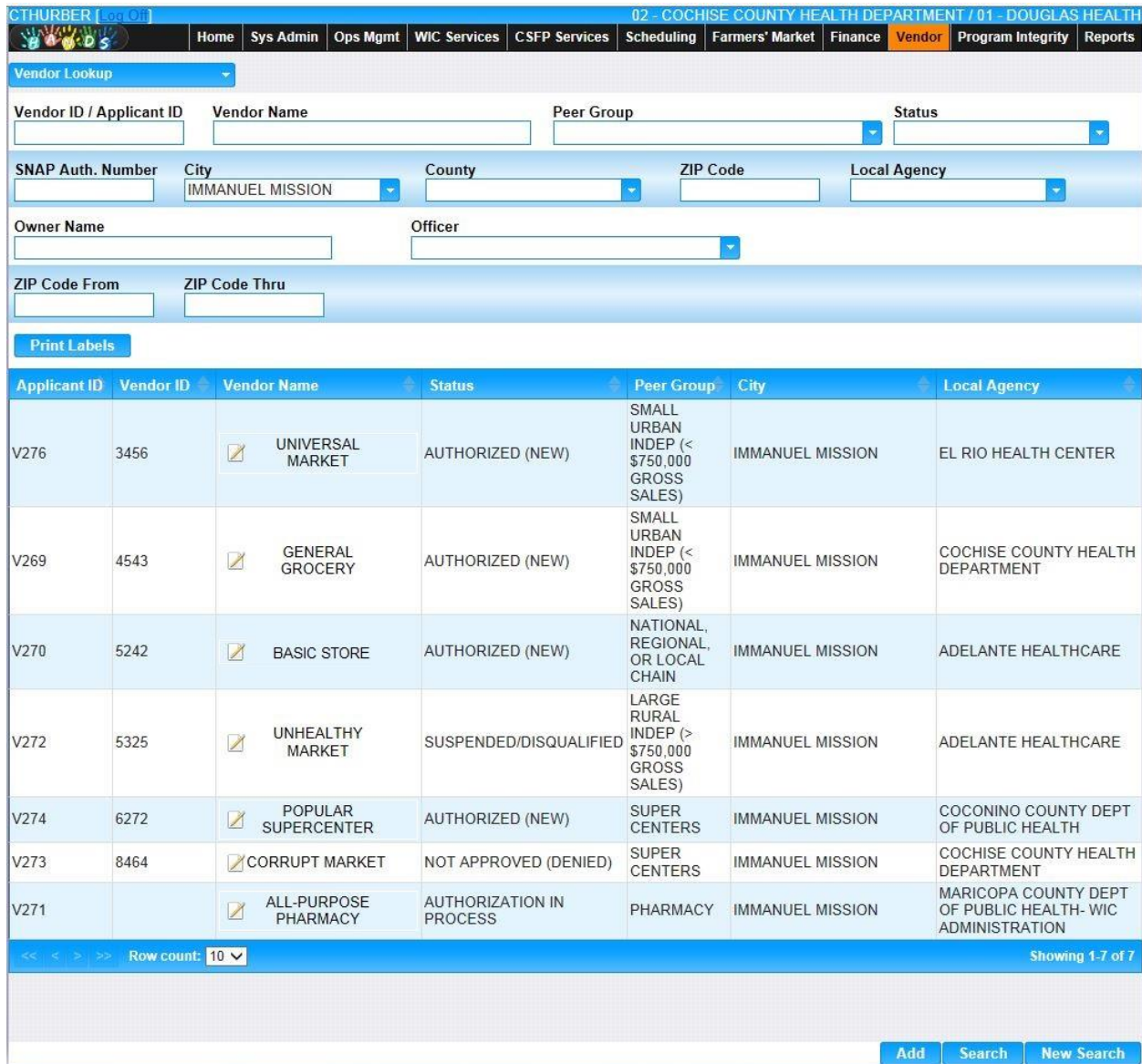
- 1) By selecting a Bank Name, the Bank Information Federal ID and Routing Number are automatically populated.
- 2) The system performs a three step save process when saving a new Owner:
  - a) First, it ensures all mandatory fields are populated with data. If not the save process will stop and an error 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.
- 3) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

## 2 VENDOR LOOKUP

The purpose of this page is to allow the user to search for existing Vendors within the HANDS system. The user can enter a single search parameter, or a combination of parameters to narrow their search. Once a search is performed, the results are displayed within the Result Grid. The desired Vendor information can be edited from the Result Grid by clicking the  (**Edit Icon**) located next to the Vendor Name. Grid columns are sortable by ascending or descending order by pressing the up or down arrows at the right of the column label. The user can also add a new Vendor to the HANDS system by clicking on the blue Add button. The Figure below depicts the initial Vendor Lookup Search page.

Navigation Path: Vendor Menu / Vendor Lookup or Vendor tab










The screenshot shows the Vendor Lookup interface. At the top, there is a navigation bar with the user name 'CTHURBER' and the system name '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH'. Below this is a menu bar with options like Home, Sys Admin, Ops Mgmt, WIC Services, C SFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. The 'Vendor' tab is selected.

The main section is titled 'Vendor Lookup' and contains several search filters:
 

- Vendor ID / Applicant ID: [ ]
- Vendor Name: [ ]
- Peer Group: [ ]
- Status: [ ]
- SNAP Auth. Number: [ ]
- City: [IMMANUEL MISSION]
- County: [ ]
- ZIP Code: [ ]
- Local Agency: [ ]
- Owner Name: [ ]
- Officer: [ ]
- ZIP Code From: [ ]
- ZIP Code Thru: [ ]

Below the filters is a 'Print Labels' button. The main area is a table with the following columns: Applicant ID, Vendor ID, Vendor Name, Status, Peer Group, City, and Local Agency. The table contains 7 rows of data:

Applicant ID	Vendor ID	Vendor Name	Status	Peer Group	City	Local Agency
V276	3456	 UNIVERSAL MARKET	AUTHORIZED (NEW)	SMALL URBAN INDEP (< \$750,000 GROSS SALES)	IMMANUEL MISSION	EL RIO HEALTH CENTER
V269	4543	 GENERAL GROCERY	AUTHORIZED (NEW)	SMALL URBAN INDEP (< \$750,000 GROSS SALES)	IMMANUEL MISSION	COCHISE COUNTY HEALTH DEPARTMENT
V270	5242	 BASIC STORE	AUTHORIZED (NEW)	NATIONAL, REGIONAL, OR LOCAL CHAIN	IMMANUEL MISSION	ADELANTE HEALTHCARE
V272	5325	 UNHEALTHY MARKET	SUSPENDED/DISQUALIFIED	LARGE RURAL INDEP (> \$750,000 GROSS SALES)	IMMANUEL MISSION	ADELANTE HEALTHCARE
V274	6272	 POPULAR SUPERCENTER	AUTHORIZED (NEW)	SUPER CENTERS	IMMANUEL MISSION	COCONINO COUNTY DEPT OF PUBLIC HEALTH
V273	8464	 CORRUPT MARKET	NOT APPROVED (DENIED)	SUPER CENTERS	IMMANUEL MISSION	COCHISE COUNTY HEALTH DEPARTMENT
V271		 ALL-PURPOSE PHARMACY	AUTHORIZATION IN PROCESS	PHARMACY	IMMANUEL MISSION	MARICOPA COUNTY DEPT OF PUBLIC HEALTH- WIC ADMINISTRATION

At the bottom of the table, there is a pagination bar showing 'Row count: 10' and 'Showing 1-7 of 7'. Below the table are three buttons: 'Add', 'Search', and 'New Search'.

Figure: Vendor Lookup Page with Results




*Search Fields:*

- **Vendor ID/Applicant ID** – The user can enter the Vendor ID or the Applicant ID to search for, either value is accepted to perform the search. The Vendor ID is a unique, four-digit, user-defined identification number for a Vendor. The Applicant ID is a system generated numeric value used to uniquely identify each Applicant, consisting of four-characters that must start with a letter, followed by three numbers. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is optional.
- **Vendor Name** – The user can search by Vendor/Applicant's name. See Background Processes for description on Wild Card searches. This field is optional.
- **Peer Group** – The user can search for a specific Peer Group. Examples of Peer Groups are Pharmacy, Large Rural Independent, and National, Regional, or Local Chain. This field value can be selected from the drop down. This field is optional.
- **Status** – The user can search based on the current authorization status of the Vendor such as Authorized (New), Authorization in Process, or Not Approved (Denied). This field value can be selected from the drop down. This field is display only.
- **SNAP Auth. Number** – The associated SNAP Authorization Number can be used to search. This field is optional.
- **City** – The City in which the Vendor/Applicant is located can be used to search. The user can manually enter the City or select the value from the drop down. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is optional.
- **County** – The user can search by County in which the Vendor/Applicant is located. The user can manually enter the County or select the value from the drop down. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is optional.
- **ZIP Code** – The ZIP Code in which the Vendor/Applicant is located can be used to search. This field is optional.
- **Local Agency** – The organizational unit that serves as the Local Agency for the Vendor can be used to search. This value can be manually entered or selected from the drop down. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is optional. For more information, please refer to the Organizational Units in Operations Management.
- **Owner Name** – The user can enter the Corporation Name or Owner ID (a system generated numeric value used to uniquely identify each Owner) to search for, either value is accepted to perform the search. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is optional.
- **Officer** – The user can search for a Vendor by an associated Officer. The user can manually enter the Officer's First or Last Name or select the value from the drop down. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is optional.

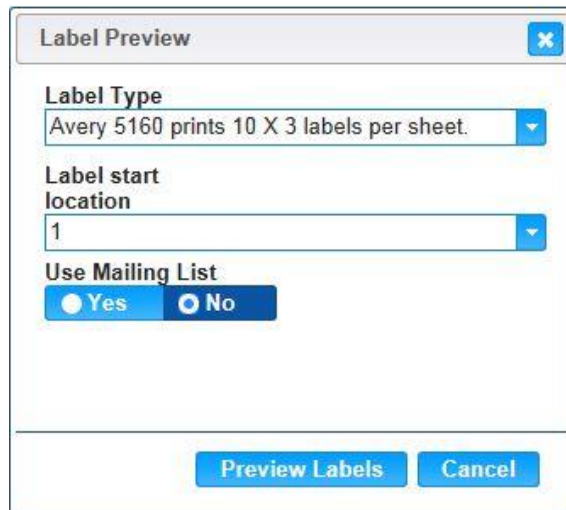
- **ZIP Code From** – A range of ZIP Codes can be defined for the search. The ZIP Code From is the beginning of the range. This field is optional, however, must be specified if a ZIP Code Thru value is specified.
- **ZIP Code Thru** – A range of ZIP Codes can be defined for the search. The ZIP Code Thru is the end of the range. This field is optional, however, must be specified if a ZIP Code From value is specified. The ZIP Code Thru value must be greater than or equal to the ZIP Code From value.

*Search Result Grid fields:*

- **Applicant ID** – The Applicant ID is a system generated numeric value used to uniquely identify each Applicant, consisting of four-characters that must start with a letter, followed by a three numbers. This field is display only.
- **Vendor ID** – The Vendor ID is a unique, four-digit, system generated identification number for a Vendor. This field is display only.
- **Vendor Name** – The Vendor Name is the user-defined name for the Vendor.
  -  **(Edit Icon)** – Once a record has been added, the Edit Icon will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
- **Status** — The current authorization status of the Vendor such as Authorized (New), Authorization in Process, or Not Approved (Denied). This field is display only.
- **Peer Group** – The user can use a search for a specific Peer Group. Examples of Peer Groups are Pharmacy, Large Rural Independent, and National, Regional, or Local Chain. This field is display only.
- **City** – The City in which the Vendor/Applicant is located. This field is display only.
- **Local Agency** – The organizational unit that serves as the Local Agency for the Vendor. This field is display only. For more information, please refer to the Organizational Units in Operations Management.

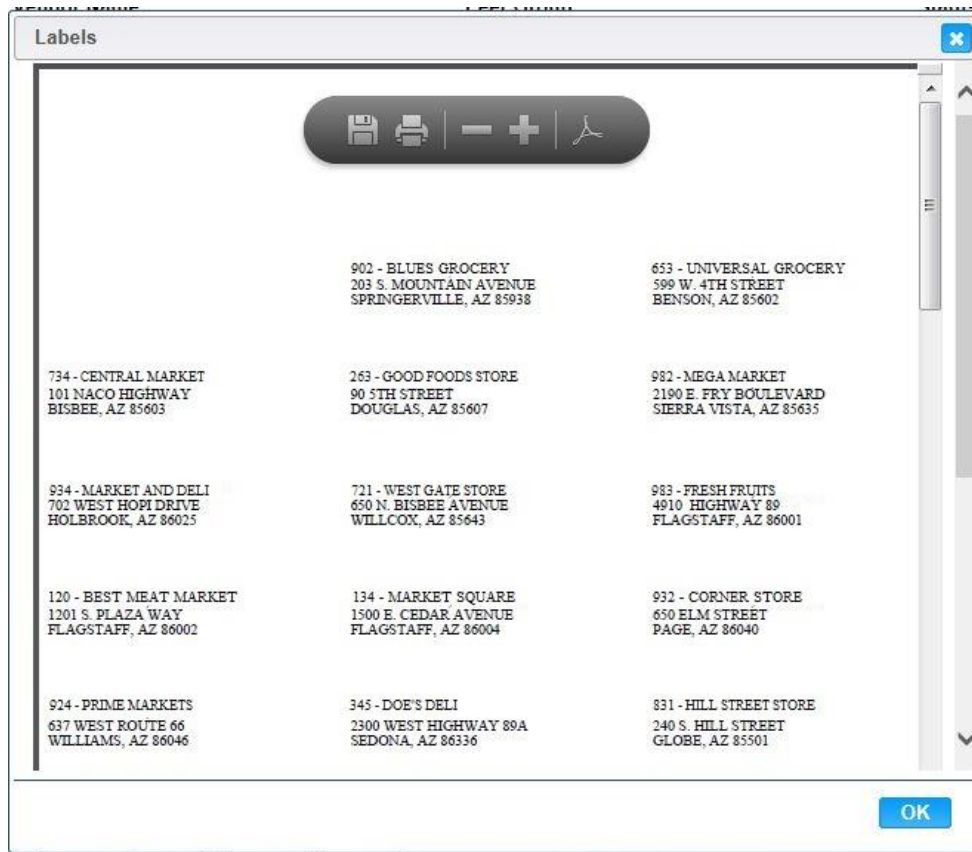
*Buttons:*

- **Add** – Press this button to add a new Vendor to the HANDS system.
- **Search** – Press this button to perform a search with the search criteria entered.
- **New Search** – Press this button to clear search criteria entered and search results retrieved.
- **Print Labels** – The Print Labels button becomes enabled after a search has been performed. Press this button to create a label for every Vendor displayed in the Result Grid.



The screenshot shows a 'Label Preview' dialog box. It has a title bar with a close button (X). The dialog contains three fields: 'Label Type' with a dropdown menu showing 'Avery 5160 prints 10 X 3 labels per sheet.', 'Label start location' with a dropdown menu showing '1', and 'Use Mailing List' with radio buttons for 'Yes' (selected) and 'No'. At the bottom are two buttons: 'Preview Labels' and 'Cancel'.

- **X (Close Window)** – By clicking this button, the window is closed and no action is taken.
- **Label Type** – Used to select the brand and/or format of the full sheet shipping labels to be used for printing. Possible field values will be available for selection within the drop down as characters are entered into the field. If an unknown value is entered, the message, “Value not found” will be displayed. This field defaults to the first label type, which is used if no value is specified.
- **Label Start Location** – Defines which first label on the page that HANDS should print the first address. For example, the user can configure HANDS to start printing on the 5<sup>th</sup> label on the sheet. See the Figure below for an example starting at the 5<sup>th</sup> label. Possible field values will be available for selection within the drop down as characters are entered into the field. If an unknown value is entered, the message, “Value not found” will be displayed. This field defaults to ‘1’, which is used if no value is specified.
- **Use Mailing List** – If ‘Yes’ is selected, the vendor’s mailing address will be printed on the label. If ‘No’ is selected, the street address will be printed. Default is ‘No’.
- **Preview Labels** – Press this button to open the label viewer. The user can take advantage of the built in Adobe Save or Print options by hovering the mouse at the top of the Label Viewer window. The OK button closes the viewer. By clicking the **X (Close Window)**, the window is closed and no action is taken.



- **Cancel** – Press this button to close the Print Labels Modal.

*Calculation(s):* None

*Background Process(es):*

- 1) Search is performed for matching records based on criteria entered. Search output appears in the Result Grid.
- 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.

## 2.1 Vendor Demographics

The Vendor Demographic screen allows the user to enter demographic information such as the associated Addresses, and Primary Contact. Once information is entered and successfully saved, the information becomes searchable on the Vendor Lookup page. See the Figure below for the initial Add screen for Vendor.

Navigation Path: *Vendor Lookup / Add Button*

The screenshot displays the 'Vendor Add Page' interface. At the top, there is a navigation menu with 'Vendor' selected. Below the menu is a 'Back to List' button. The main form area contains several sections:
 

- Owner:** A dropdown menu for Owner and a text field for Ownership Date.
- Vendor Name:** A text field for Vendor Name and a dropdown menu for Vendor Type.
- Peer Group:** A dropdown menu for Peer Group, a dropdown menu for Risk Level (currently set to 'LOW'), a 'Previous Vendor' checkbox, and a text field for Previous Expiration Date.
- Primary Phone:** Text fields for Primary Phone, Ext., and a dropdown menu for Phone Type.
- Street Address:** Text fields for Address 1, Address 2, and City, State, ZIP Code, and County.
- Mailing Address:** Text fields for Address 1, Address 2, and City, State, ZIP Code, and County, with a 'Copy Street To Mailing' button.
- Primary Contact:** A dropdown menu for Title, text fields for Last Name, First Name, and MI, and text fields for Primary Phone, Ext., and a dropdown menu for Phone Type.

 At the bottom of the form, there are three checkboxes: 'Conflict Of Interest', 'ADA Compliance', and 'Operating Permit Valid' (which is checked). 'Save' and 'Reset' buttons are located at the bottom right of the page.

Figure : Vendor Add Page

### Fields:

- Owner** – The Owner ID and Corporation Name of the Owner. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is mandatory. For more information, please refer to the Owners Lookup.
- Ownership Date** – The date on which the Owner took ownership of the Vendor/Applicant. The Ownership Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Ownership Date. The user may also select the Ownership Date using the provided Calendar which appears when the field is entered. This field is optional.

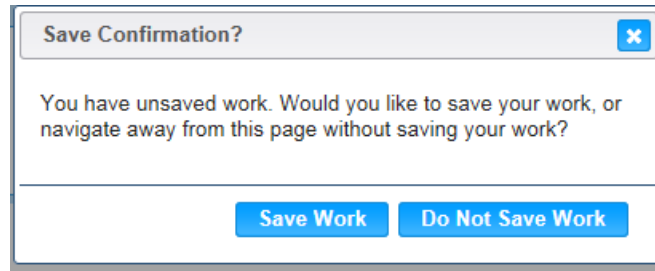
- **Vendor Name** – The name of the Vendor. This field accepts alphanumeric and special characters. This field is mandatory.
- **Vendor Type** – The type of Vendor/Applicant. This field can be manually entered, or chosen from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. This field is mandatory. For more information, please refer to the Sys Admin | Vendor Base Tables | Vendor Types.
- **Peer Group** – The Peer Group in which the Vendor belongs. Examples of Peer Groups are Pharmacy, Large Rural Independent, and National, Regional, or Local Chain. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is mandatory.
- **Risk Level** – The level of potential risk for the Vendor. This field will default to the lowest risk value. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. For more information, please refer to the Sys Admin | Vendor Base Tables for Risk Levels.
- **Previous Vendor** – A check box that indicates that the Vendor/Applicant has previously been a WIC Vendor. This information is entered directly from the WIC application and is not generated. This field is optional. If the check box is marked, it enables the Previous Expiration Date field.
- **Previous Expiration Date** – The date on which the Vendor/Applicant’s previous WIC contract expired. This information is entered directly from the WIC application and is not generated. The Previous Expiration Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Ownership Date. The user may also select the Previous Expiration Date using the provided Calendar which appears when the field is entered. This is a mandatory field if Previous Vendor is checked.
- **Primary Phone** – This is the primary Phone Number associated with the Vendor. This field must contain 10 numeric digits. The user does not need to input any special formatting, such as parentheses or dash. This field is mandatory.
- **Ext.** – The phone extension of the Vendor, if applicable. The Phone Extension must be numeric and contain no more than 5 digits. This field is optional.
- **Phone Type** – This field indicates the Phone Type of the Phone Number being added such as Cell, Home, or Work Phone. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the system assigned Phone Type ID, which will also highlight possible completions for Phone Type. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | System Base Tables for Phone Types. This field is mandatory.
- **Street Address:**
  - **Address 1** – The first of two Street Address fields available for the Vendor’s street address. The Street Address 1 allows alphanumeric and special characters. This field is mandatory.

- **Address 2** – The second of two Street Address fields available for the Vendor’s street address. The Street Address 2 allows alphanumeric and special characters. This field is optional.
- **City, State, ZIP Code, and County** – The Street City, State, ZIP Code, and County portion of the Vendor Address. Any portion of this field (i.e. State or ZIP Code) can be manually entered for this field. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is mandatory.
- **Mailing Address:**
  - **Address 1** – The first of two Mailing Address fields available for the Vendor’s mailing address. The Mailing Address 1 allows alphanumeric and special characters. This field is mandatory.
  - **Address 2** – The second of two Mailing Address fields available for the Vendor’s mailing address. The Mailing Address 2 allows alphanumeric and special characters. This field is optional.
  - **City, State, ZIP Code, and County** – The Mailing City, State, ZIP Code, and County portion of the Vendor Mailing Address. Any portion of this field (i.e. State or ZIP Code) can be manually entered for this field. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is mandatory.
- **Primary Contact:**
  - **Title** – The title of the person functioning as the Primary Contact such as Cashier, Clerk, Owner, or Manager. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is mandatory. For more information, please refer to the Sys Admin | System Base Tables for Contact Titles.
  - **Last Name** – The last name of the Primary Contact for the Vendor. This field allows alphanumeric and special characters. This field is mandatory.
  - **First Name** – The first name of the Primary Contact for the Vendor. This field allows alphanumeric and special characters. This field is optional.
  - **MI (Middle Initial)** – The middle initial of the Primary Contact for the. This field allows up to 3 alphanumeric and special characters. This field is optional.
  - **Primary Phone** – The primary Phone Number associated with the Vendor. This field must contain 10 numeric digits. The user does not need to input any special formatting, such as parentheses or dash. This field is mandatory.
  - **Ext.** – The phone extension of the Vendor, if applicable. The Phone Extension must be numeric and contain no more than 5 digits. This field is optional.
  - **Phone Type** – This field indicates the Phone Type of the Phone Number being added such as Cell, Home, or Work Phone. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the system assigned Phone Type ID, which will also highlight possible completions for Phone Type. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | System Base Tables for Phone Types. This field is mandatory.
- **Conflict of Interest** – This check box indicates a possible conflict of interest exists for the Vendor/Applicant. This check box is optional.

- **ADA Compliance** – This check box indicates that the Vendor/Applicant is in compliance with the ADA (Americans With Disabilities). This check box is optional.
- **Operating Permit Valid** – This check box indicates the Vendor/Applicant has a valid operating permit from the health department. This check box is optional, but defaults as being marked.

*Buttons:*

- **Back To List** – Press this button to go back to the Vendor Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.



- **✕ (Close Window)** – The window is closed and no action is taken.
  - **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
  - **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.
- **Copy Street To Mailing** (**Copy Street To Mailing**) – The clicking of the Copy Street To Mailing button will 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.
- **Save** – Press this button to save the new Vendor record.
- **Reset** – Press this button to undo any modifications made to the Vendor record since the last Save was performed.

*Calculation(s):* None

*Background Process(es):*

- 1) The system performs a multi-step save process when saving a new Vendor:
  - 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:



- i. The user is brought to the Demographics | General page.
- ii. When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
- iii. The Active Record on the left becomes populated with general information about the Vendor.
- iv. The HANDS system assigns the Applicant ID. The Applicant ID is used to uniquely identify each Applicant, consisting of four-characters that must start with a letter, followed by a three numbers.
  - v. The Operating Permit Valid check box is marked by default.
  - vi. Also, the Vendor Authorizations is created using a default Status of “AUTHORIZATION IN PROCESS”. This information is available under the Demographics | Authorizations page.
- vii. The primary Street Address and Mailing Address becomes populated under the Demographics | Addresses page.
- viii. The primary Contact becomes populated under the Demographics | Contacts page.
- ix. The associated Peer Group is populated under the Sales | General as the field value for “Please select the value which best describes your outlet”.

### 2.1.1 Vendor Add: Demographics | General

Once the initial information for a Vendor is saved on the Add Vendor screen, the user is brought to the Demographics | General page. At this point, the Vendor ID has not been configured for the Vendor. The user must enter additional information and define the Vendor Clinics. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Demographics | General Add screen for Vendor.

Navigation Path: Vendor Lookup | Add Button | Demographics General Page




Figure: Vendor Demographics General Add Page

Fields:

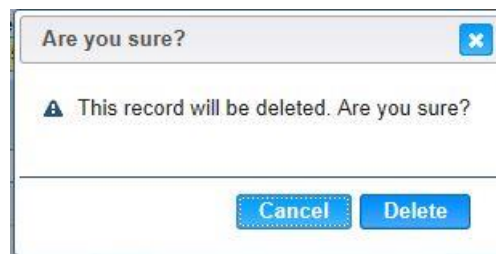
- **Vendor ID** – Upon adding a new Vendor, this field is initially blank and disabled. The Vendor ID value is created under Demographic |Authorizations.
- **Applicant ID** – The Applicant ID is a system generated numeric value used to uniquely identify each Applicant, consisting of four-characters that must start with a letter, followed by a three numbers. This field is display only.
- **Name** – The name of the Vendor. This field accepts alphanumeric and special characters. This field is mandatory.
- **Doing Business As** –The name under which the Vendor/Applicant operates the business. This field accepts alphanumeric and special characters. This field is optional.

- **Vendor Type** – The type of Vendor/Applicant. This field can be manually entered, or chosen from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. This field is mandatory. For more information, please refer to the Sys Admin | Vendor Type Base Table for Vendor Types.
- **Status** – The current authorization status of the Vendor such as Authorized (New), Authorization in Process, or Not Approved (Denied). Upon adding a new Vendor, this field defaults to “AUTHORIZATION IN PROCESS”. This value can be modified under the Demographics | Authorizations. However, on the General tab this field is display only.
- **Previous Vendor** – A check box that indicates that the Vendor/Applicant has previously been a WIC Vendor. This information is entered directly from the WIC application and is not generated. This field is optional. If the check box is marked, it enables the Previous Expiration Date field.
- **Previous Expiration Date** – The date on which the Vendor/Applicant’s previous WIC contract expired. This information is entered directly from the WIC application and is not generated. The Previous Expiration Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Ownership Date. The user may also select the Previous Expiration Date using the provided Calendar which appears when the field is entered. This is a mandatory field if Previous Vendor is checked.
- **Owner** – The Owner ID and Corporation Name of the Owner. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is optional. For more information, please refer to the Owners Lookup.
- **Ownership Date** – The date on which the Owner took possession of the Vendor/Applicant. The Ownership Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Ownership Date. The user may also select the Ownership Date using the provided Calendar which appears when the field is entered. This field is optional.
- **Risk Level** – The level of potential risk for the Vendor. This field will default to the lowest risk value. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. For more information, please refer to the Sys Admin | Vendor Base Tables for Risk Levels.
- **Peer Group** – The Peer Group under which the Vendor belongs. Examples of Peer Groups are Pharmacy, Large Rural Independent, and National, Regional, or Local Chain. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is mandatory.
- **Rating Information** – Allows health permit and rating information to be detailed for the Vendor. This field accepts alphanumeric and special characters. This field is optional.
- **Vendor Email Grid** – Upon the initial Add, there is no data to show within this Grid. This field is optional.




- **Vendor Phone Grid:**

- **Phone Type** – This field indicates the Phone Type of the Phone Number being added such as Cell, Home, or Work Phone. This field is display only.
- **Phone Number** – This is the Phone Number associated with the Owner. This field is display only.
- **Ext.** – The phone extension of the Owner, if applicable. This field is display only.
- **Priority** – Each Vendor Email Address configured is given a Priority selection option such as Primary, Secondary, or Other. This field is display only.
-  (**Edit Icon**) – When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
-  (**Delete Icon**) – When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Phone Information will remain in the Vendor Phone Grid. If Delete button is selected, the record will be removed. By clicking the  (**Close Window**), the window is closed and no action is taken.

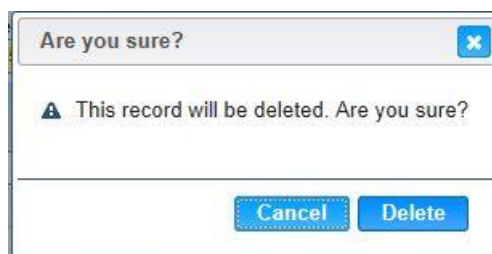
*Note:* The record will not be permanently removed until a Save is performed.



- **Vendor Clinics Grid:**

- **Agency** – The organizational unit that serves as the Local Agency for the Vendor. This field display only.
- **Clinic** – The organizational unit that serves as the Clinic for the Vendor. This field is display only.
- **Priority** Each Vendor Clinic configured is given a Priority selection option such as Primary, Secondary, or Other. This field is display only.
-  (**Edit Icon**) – When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
-  (**Delete Icon**) – When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Clinic will remain in the Vendor Clinics Grid. If Delete button is selected, the record will be removed. By clicking the  (**Close Window**), the window is closed and no action is taken.


*Note:* The record will not be permanently removed until a Save is performed.





- **Conflict of Interest** – This check box indicates a possible conflict of interest exists for the Vendor/Applicant. This check box is optional.
- **ADA Compliance** – This check box indicates that the Vendor/Applicant is in compliance with the ADA (Americans With Disabilities). This check box is optional.
- **Operating Permit Valid** – This check box indicates the Vendor/Applicant has a valid operating permit from the health department. This check box is optional.
- **Contract Price in Effect** – This check box indicates that a Contract Price Amount is present on the Price Survey Modal. This check box is display only.
- **Multi WIC Code** – This check box indicates that a Code is present on the Multi-WIC Codes tab. This check box is display only.
- **Health Violations** – This check box indicates that a Vendor Health Violation is present on the Demographics Violations tab. This check box is display only.



*Buttons:*


- **Vendor Email:**

 **(Add)** – Press this button to bring up the Add Email Modal.

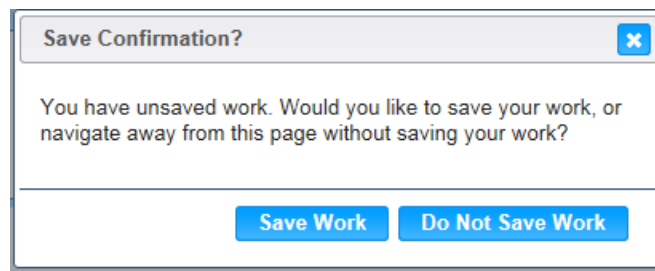


-  **(Close Window)** – By clicking this button, the window is closed and no action is taken.
- **Email Address** – The email address associated to the Vendor. The system will allow for multiple email addresses for the vendor. The e-mail address must follow the standard syntax of an email address consisting of localpart@domain. Example: [niceandsimple@example.com](mailto:niceandsimple@example.com). This field is mandatory.
- **Priority** – Each Vendor Email Address configured is given a Priority selection option such as Primary, Secondary, or Other. If Vendor Email Addresses are entered, one must be set as Primary. There can be only one Primary Vendor Email Address and one Secondary Vendor Email Address defined. There can be multiple Phone Numbers with priority of Other. This selection option is mandatory.
- **OK** – Press this button after all fields are completed.
- **Cancel** – Press this button to close the Add Email Modal and return to the Vendor Edit without saving any Vendor Email Address fields entered.
- **Phone Numbers:**
  -  **(Add)** – Press this button to bring up the Add Phone Modal.

-  **(Close Window)** – By clicking this button, the window is closed and no action is taken.
  - **Phone Type** – This field indicates the Phone Type of the Phone Number being added such as Cell, Home, or Work Phone. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the system assigned Phone Type ID, which will also highlight possible completions for Phone Type. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | System Base Tables for Phone Types. This field is mandatory.
  - **Phone Number** – This is the Phone Number associated with the Owner. This field must contain 10 numeric digits. The user does not need to input any special formatting, such as parentheses or dash. This field is mandatory.
  - **Ext.** – The phone extension of the Owner, if applicable. The Phone Extension must be numeric and contain no more than 5 digits. This field is optional.
  - **Priority** – Each Phone Number configured is given a Priority selection option such as Primary, Secondary, or Other. When Phone Numbers are entered, one must be set as Primary. There can be only one Primary Phone Number and one Secondary Phone Number defined. There can be multiple Phone Numbers with priority of Other. This selection option is mandatory.
  - **OK** – Press this button after all fields are completed.
  - **Cancel** – Press this button to close the Add Phone Modal and return to the Vendor Edit without saving any Phone Number fields entered.
- **Vendor Clinics:**
    -  **(Add)** – Press this button to bring up the Add Vendor Clinic Modal.

-  **(Close Window)** – By clicking this button, the window is closed and no action is taken.

- **Agency** – The organizational unit that serves as the Local Agency for the Vendor. This field defaults to the first Agency in the list, which is in alphabetical order. This field is mandatory. For more information, please refer to the Organizational Units in Operations Management.
- **Clinic** – The organizational unit that serves as the Clinic for the Vendor. This field is mandatory. For more information, please refer to the Organizational Units in Operations Management.
- **Priority** Each Vendor Clinic configured is given a Priority selection option such as Primary, Secondary, or Other. When Vendor Clinics are entered, one must be set as Primary. There can be only one Primary Vendor Clinic and one Secondary Vendor Clinic defined. There can be multiple Vendor Clinics with priority of Other. This selection option is mandatory.
- **OK** – Press this button after all fields are completed.
- **Cancel** – Press this button to close the Add Vendor Clinic Modal and return to the Vendor Edit without saving any Vendor Clinic fields entered.
- **Save** – Press this button to save any modifications made to the Vendor record.
- **Reset** – Press this button to undo any modifications made to the Vendor record since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.



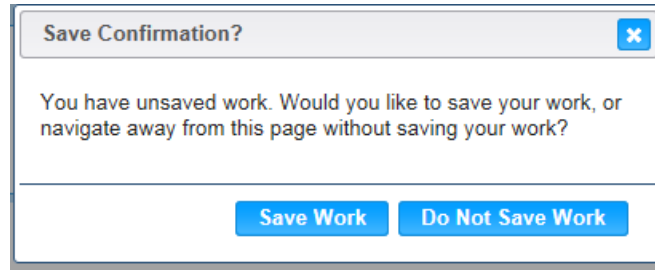
- **✕ (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

*Calculation(s):* None

*Background Process(es):*

- 1) The system performs a three step save process when saving a new Vendor Demographics | General:
  - 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.


- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
- 3) If the user attempts to navigate off the Vendor Demographics | General page without saving any modifications, the Save Confirmation notification appears.



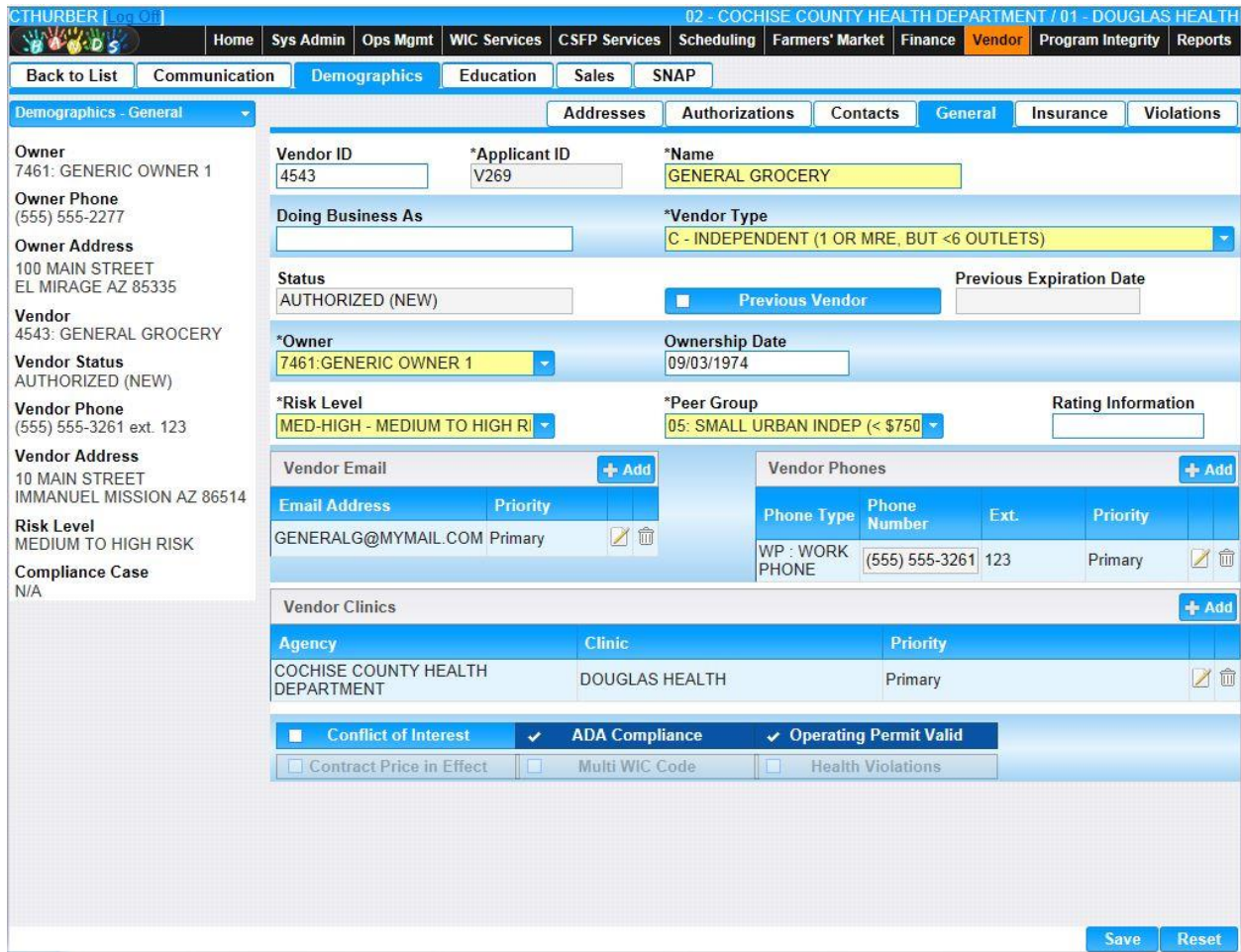
- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.



### 2.1.2 Vendor Edit: Demographics | General

Vendor Demographics General information can be modified by clicking the  (**Edit Icon**) under the Vendor Lookup Result Grid. To the left of the screen, the Active Record denotes basic information regarding the Vendor. The Edit field definitions are the same as the Add page. See the Figure below for the Demographics | General Edit screen for Vendor.

Navigation Path: Vendor Lookup Search Results | Edit Icon | Demographics General Page



The screenshot displays the 'Vendor Demographics General Edit Page' within a web application. The top navigation bar includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The main interface features a sidebar on the left with a 'Demographics - General' dropdown menu and a list of vendor details including Owner (7461: GENERIC OWNER 1), Owner Phone (555) 555-2277, Owner Address (100 MAIN STREET, EL MIRAGE AZ 85335), Vendor (4543: GENERAL GROCERY), Vendor Status (AUTHORIZED (NEW)), Vendor Phone (555) 555-3261 ext. 123, Vendor Address (10 MAIN STREET, IMMANUEL MISSION AZ 86514), Risk Level (MEDIUM TO HIGH RISK), and Compliance Case (N/A). The main form area contains several sections: 'Vendor ID' (4543), '\*Applicant ID' (V269), '\*Name' (GENERAL GROCERY), 'Doing Business As', '\*Vendor Type' (C - INDEPENDENT (1 OR MRE, BUT <6 OUTLETS)), 'Status' (AUTHORIZED (NEW)), 'Previous Vendor' (checkbox), 'Previous Expiration Date', '\*Owner' (7461:GENERIC OWNER 1), 'Ownership Date' (09/03/1974), '\*Risk Level' (MED-HIGH - MEDIUM TO HIGH RI), '\*Peer Group' (05: SMALL URBAN INDEP (< \$750)), and 'Rating Information'. Below these are sections for 'Vendor Email' (GENERALG@MYMAIL.COM, Primary), 'Vendor Phones' (WP : WORK PHONE, (555) 555-3261, 123, Primary), 'Vendor Clinics' (COCHISE COUNTY HEALTH DEPARTMENT, DOUGLAS HEALTH, Primary), and a 'Compliance' section with checkboxes for Conflict of Interest, ADA Compliance, Operating Permit Valid, Contract Price in Effect, Multi WIC Code, and Health Violations. The page concludes with 'Save' and 'Reset' buttons.

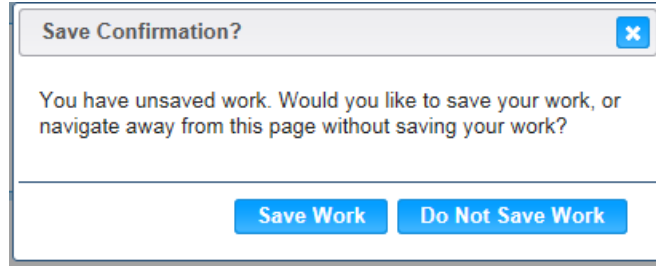
Figure: Vendor Demographics General Edit Page

Calculation(s): None

Background Process(es):

- 1) The system performs a three step save process when saving modifications to the Vendor Demographics | General:
  - 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
- 3) If the user attempts to navigate off the Vendor Demographics | General page without saving any modifications, the Save Confirmation notification appears.



- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

### 2.1.3 Vendor Edit: Demographics | Addresses

After the initial save for Vendor, the Street Address and Mailing Address are copied to the Addresses tab. The user is allowed to modify the addresses; there is no Add functionality. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Demographics | Addresses Edit screen for Vendor.

*Navigation Path: Vendor Lookup Search Results | Edit Icon | Demographics Addresses Page*

The screenshot displays the 'Vendor Demographics Addresses Edit Page'. The top navigation bar includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The 'Vendor' tab is selected. Below the navigation bar, there are tabs for 'Back to List', 'Communication', 'Demographics', 'Education', 'Sales', and 'SNAP'. The 'Demographics' tab is active, showing a sidebar with vendor information and a main content area with three address sections: 'Street Address', 'Mailing Address', and 'Other Mailing Address'. Each section has input fields for 'Address 1', 'Address 2', and 'City, State, ZIP Code, and County'. The 'Street Address' section has a 'Copy Street To Mailing' button. The 'Mailing Address' section has a 'Copy Mailing To Other Mailing' button. The 'Other Mailing Address' section has a 'Copy Mailing To Other Mailing' button. At the bottom right, there are 'Save' and 'Reset' buttons.

*Figure: Vendor Demographics Addresses Edit Page*

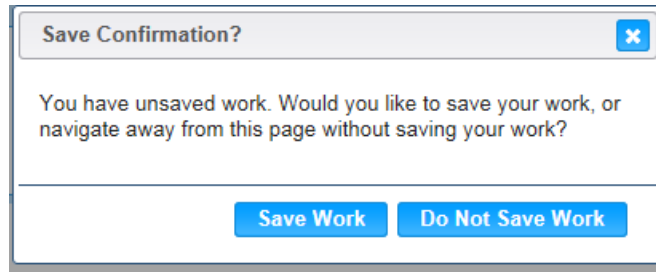
#### Fields:

- **Street Address:**
  - **Address 1** – The first of two Street Address fields available for the Vendor’s street address. The Street Address 1 allows alphanumeric and special characters. This field is mandatory.
  - **Address 2** – The second of two Street Address fields available for the Vendor’s street address. The Street Address 2 allows alphanumeric and special characters. This field is optional.
  - **City, State, ZIP Code, and County** – The Street City, State, ZIP Code, and County portion of the Vendor Address. Any portion of this field (i.e. State or ZIP Code) can be manually entered for this field. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is mandatory.

- **Mailing Address:**
  - **Address 1** – The first of two Mailing Address fields available for the Vendor’s mailing address. The Mailing Address 1 allows alphanumeric and special characters. This field is mandatory.
  - **Address 2** – The second of two Mailing Address fields available for the Vendor’s mailing address. The Mailing Address 2 allows alphanumeric and special characters. This field is optional.
  - **City, State, ZIP Code, and County** – The Mailing City, State, ZIP Code, and County portion of the Vendor Mailing Address. Any portion of this field (i.e. State or ZIP Code) can be manually entered for this field. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is mandatory.
- **Other Mailing Address:**
  - **Mailing Address 1** – The first of two Mailing Address fields available for the Vendor’s other mailing address. The Mailing Address 1 allows alphanumeric and special characters. This field is mandatory.
  - **Mailing Address 2** – The second of two Mailing Address fields available for the Vendor’s other mailing address. The Mailing Address 2 allows alphanumeric and special characters. This field is optional.
  - **Mailing City, State, ZIP Code, and County** – The Mailing City, State, ZIP Code, and County portion of the Vendor Other Mailing Address. Any portion of this field (i.e. State or ZIP Code) can be manually entered for this field. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is mandatory.

*Buttons:*

- **Copy Street To Mailing** (**Copy Street To Mailing**) – The clicking of the Copy Street To Mailing button will 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.
- **Copy Mailing To Other Mailing** (**Copy Mailing To Other Mailing**) – The clicking of the Copy Mailing To Other Mailing button will overwrite entered data in the Other Mailing address fields with the exact data entered in the mailing address fields. After the button is clicked additional changes made to the mailing address fields will not be reflected in the Other Mailing address fields unless the button is clicked again.
- **Save** – Press this button to save the new/modified Vendor Address record.
- **Reset** – Press this button to undo any modifications made to the Vendor Address record since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Demographics | Addresses page with previous results. If there is unsaved work the Save Confirmation notification appears.

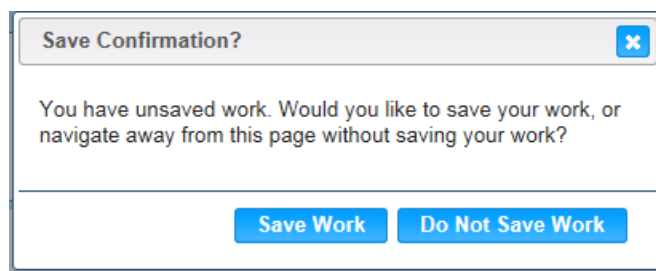


- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

*Calculation(s):* None

*Background Process(es):*

- 1) The system performs a three step save process when saving modifications to the Vendor Demographics | Addresses:
  - 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
- 3) If the user attempts to navigate off the Vendor Demographics | Addresses page without saving any modifications, the Save Confirmation notification appears.



- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

## 2.1.4 Vendor Add: Demographics | Authorizations

After the initial save for Vendor, initial authorization information is created under the Authorizations tab. The user can use the Add button to add additional authorizations-related records for a Vendor, however, the Start and End Dates cannot overlap with an existing record. To the left of the screen, the Active Record denotes basic information regarding the Vendor in context. See the Figure below for the Demographics | Authorizations Add screen for Vendor.


*Navigation Path: Vendor Lookup | Add Button | Demographics Authorizations Page*

Auth Date	Status	Start Date	End Date	Term Date	Authorized By
11/10/2014	AUTHORIZED (NEW)	11/10/2014	11/11/2014		CHERYL THURBER

*Figure: Vendor Demographics Authorizations Add Page*

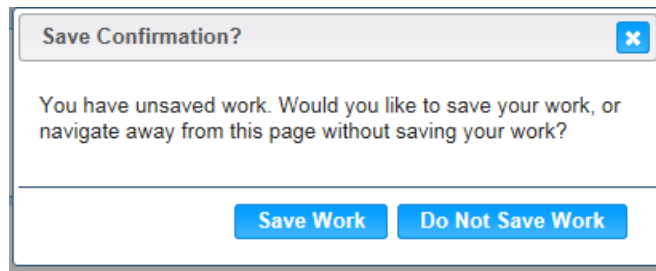
*Fields:*


- **Vendor Authorizations Grid:**
  - **Auth Date** – The date on which the Vendor/Applicant submitted the (re)application. This date is created by the HANDS system when the Vendor is originally saved. This field is display only.
  - **Status** – The current authorization status of the Vendor such as Authorized (New), Authorization in Process, or Not Approved (Denied). This field is display only.
  - **Start Date** – The date the Applicant was authorized. This field is display only.

- **End Date** – The date that the authorization period will expire. The HANDS system calculates a default value from the start date using a 3-year authorization period. This field is display only.
- **Term Date** – The date on which the Vendor was terminated if the vendor was terminated during the authorization period. If not terminated during the authorization period, the field is blank. This field is display only.
- **Authorized By** – The user who authorized the Applicant. This field is display only.
-  **(Edit Icon)** – When selected from the Result Grid, navigation will switch to the Edit Screen pre-populated with the details of the record for editing. See Section 2.1.5 below for example Vendor Authorizations Edit page.

*Buttons:*

- **Save** – Press this button to save the new/modified Vendor Authorization record.
- **Reset** – Press this button to undo any modifications made to the Vendor Authorization record since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Demographics | Authorizations page with previous results. If there is unsaved work the Save Confirmation notification appears.



-  **(Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

- **Add** – Press this button to add a new Authorization for this Vendor. The dates of the new record cannot overlap with another authorization defined. See the Figure below for an example Authorizations Add page.

Navigation Path: Vendor Lookup / Add Button / Demographics Authorizations Page / Add Button

The screenshot shows the 'Vendor Demographics Authorizations Add Page' in a web application. The top navigation bar includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The 'Vendor' menu item is highlighted. Below the navigation bar is a 'Back to List' button. The main form area is divided into several sections:

- Owner Information:** Owner: 7461: GENERIC OWNER 1; Owner Phone: (555) 555-2277; Owner Address: 100 MAIN STREET, EL MIRAGE AZ 85335.
- Vendor Information:** Vendor: 0890: GENERAL GROCERY; Vendor Status: NOT APPROVED (DENIED); Vendor Phone: (555) 555-3261 ext. 123; Vendor Address: 110 MAIN STREET, IMMANUEL MISSION AZ 86514; Risk Level: MEDIUM TO HIGH RISK; Compliance Case: N/A.
- Authorization Details:**
  - \*Status: A dropdown menu.
  - Vendor ID: 0890 (text input).
  - Application Date: (text input).
  - Authorized By: (text input).
  - \*Start Date: 11/12/2014 (text input).
  - \*End Date: 11/12/2017 (text input).
  - Termination Reason: A dropdown menu.
  - Termination Date: (text input).
  - Denial Date: (text input).
  - Final Deposit Date: 11/24/2017 (text input).
  - Stamp Returned Flag: Radio buttons for True and False.
  - Notify SNAP Flag: Radio buttons for True and False.
- Denial Reasons:** A table with a '+ Add' button. The table is currently empty, showing 'No data to show'.
- Disqualifications:** A table with a '+ Add' button. The table is currently empty, showing 'No data to show'.

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

Figure: Vendor Demographics Authorizations Add Page

#### Fields:

- **Status** – The current authorization status of the Vendor such as Authorized (New), Authorization in Process, or Not Approved (Denied). Upon adding a new Vendor, this field defaults to “AUTHORIZATION IN PROCESS”. When the value of “AUTHORIZED (NEW)” is selected, the Vendor ID field becomes enabled. This field is mandatory.
- **Vendor ID** – The Vendor ID is a unique, four-digit, user-defined identification number for a Vendor. If the vendor has been previously authorized, the original Vendor ID is the default value, however, the user may select a different value for this field. This value must be a number less than 9000. If no value is specified, the default value is used. This field is mandatory if the Applicant is authorized.
- **Application Date** – The date on which the Vendor/Applicant submitted the (re)application form. The Application Date is entered in format MM/DD/YYYY. This field is optional.




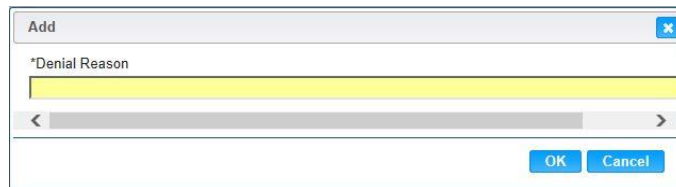
- **Authorized By** – When creating a new record, this field will be auto-populated with the current user’s Staff ID, First Name, and Last Name upon selecting “AUTHORIZED (NEW)” as the status. When viewing an existing record, the field value is of the user who authorized the applicant.
- **Start Date** – The date the Applicant was authorized. This field will default to the current date when the “AUTHORIZED (NEW)” status is selected. This field is mandatory.
- **End Date** – The date that the authorization period will expire. The HANDS system calculates a default value from the start date, using a 3-year authorization period. This field is mandatory if Start Date is filled in.
- **Termination Reason** – The reason that the Vendor was terminated from the WIC program. This field is mandatory when the Status has been changed to “TERMINATED/DISQUALIFIED” for an authorized vendor. For more information, please refer to the Sys Admin | Vendor Base Tables for Terminations.
- **Termination Date** – The date on which the Vendor was terminated. The Termination Date is entered in format MM/DD/YYYY. This field is mandatory if an Authorization Status of “TERMINATED/ DISQUALIFIED” was selected for an authorized vendor.
- **Denial Date** – The date of denial from the WIC program. The Denial Date is entered in format MM/DD/YYYY. This field is mandatory if an Authorization Status of “NOT APPROVED (DENIED)” was selected.
- **Final Deposit Date** – The last date that the bank is authorized to pay a food benefit for a Vendor. The Final Deposit Date is entered in format MM/DD/YYYY.  
The Final Deposit Date will default to the Vendor Authorization Expiration Date plus 12 months if the Termination Date is empty. If a Termination Date is specified, the Final Deposit Date will default to the Termination Date plus 12 months. This field is only enabled and modifiable for an authorized Vendor. This field is optional.
- **Stamp Returned Flag** – This selection allows the user to identify if a Stamp has been returned by this Vendor. This field is only enabled and modifiable for an authorized Vendor. This field is optional.
- **Notify SNAP Flag** – This selection allows the user to indicate that SNAP has been notified by WIC that the vendor has been terminated, suspended or disqualified. This field is only enabled and modifiable when the Authorization Status is “AUTHORIZED (NEW)”.
- **Denial Reasons Grid:**
  - **Denial Reason** – The reason the Vendor’s authorization was denied. This field is display only.
- **Disqualifications Grid:**
  - **Disqualification Reason** – The reason the Vendor’s authorization was suspended or disqualified. This field is display only.
  - **Start Date** – The starting date of disqualification from the WIC program. This field is display only.


- **End Date** – The ending date of disqualification from the WIC program. This field is display only.
- **Refer SNAP Date** – The date the Vendor was referred to the SNAP Program. This field is display only.
- **Refer SNAP** – This selection option is used to indicate the Vendor was referred to the SNAP Program in conjunction with being disqualified. This field is display only.

*Buttons:*


- **Denial Reasons:**

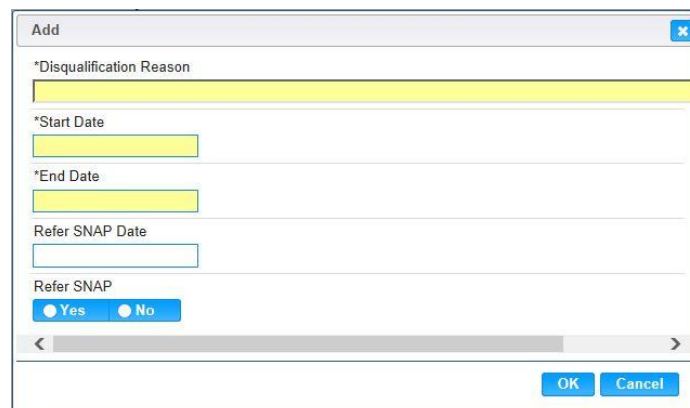
-  **(Add)** – Press this button to bring up the Add Denial Reason Modal.




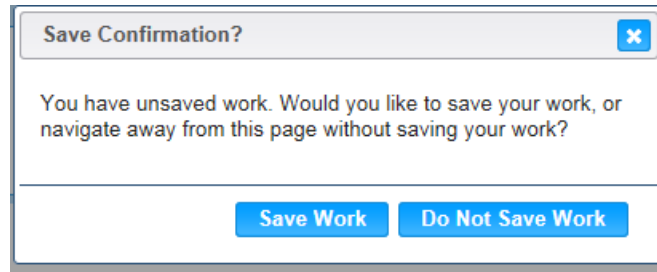
-  **(Close Window)** – By clicking this button, the window is closed and no action is taken.
- **Denial Reason** – The reason the Vendor’s authorization was denied. The reason can be selected from the drop down by clicking the down arrow at the right of the field and scrolling through the list. This field is mandatory if the Authorization Status of “NOT APPROVED (DENIED)” has been selected.
- **OK** – Press this button after all fields are completed.
- **Cancel** – Press this button to close the Add Denial Reason Modal and return to the Vendor Authorizations without saving any Denial Reason fields entered.

- **Disqualifications:**

-  **(Add)** – Press this button to bring up the Add Disqualifications Modal.



-  **(Close Window)** – By clicking this button, the window is closed and no action is taken.
  - **Disqualification Reason** – The reason the Vendor’s authorization was suspended or disqualified. The reason can be selected from the drop down by clicking the down arrow at the right of the field and scrolling through the list. This field is mandatory if the Authorization Status of “SUSPENDED/ DISQUALIFIED” has been selected.
  - **Start Date** – The starting date of disqualification from the WIC program. The Start Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Start Date. The user may also select the Start Date using the provided Calendar which appears when the field is entered. This field is mandatory if the Authorization Status of “SUSPENDED/ DISQUALIFIED” has been selected.
  - **End Date** – The ending date of disqualification from the WIC program. The End Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the End Date. The user may also select the End Date using the provided Calendar which appears when the field is entered. This field is mandatory if the Authorization Status of “SUSPENDED/ DISQUALIFIED” has been selected.
  - **Refer SNAP Date** – The date the Vendor was referred to the SNAP Program. This field is mandatory when Refer SNAP selection option is set to “Yes”. The Refer SNAP Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Refer SNAP Date. The user may also select the Refer SNAP Date using the provided Calendar which appears when the field is entered.
  - **Refer SNAP** – This selection option is used to indicate the Vendor was referred to the SNAP Program in conjunction with being disqualified. This selection option is optional.
  - **OK** – Press this button after all fields are completed.
  - **Cancel** – Press this button to close the Add Disqualification Modal and return to the Vendor Authorizations without saving any Disqualification fields entered.
- **Save** – Press this button to save the new/modified Vendor Authorization record.
  - **Reset** – Press this button to undo any modifications made to the Vendor Authorization record since the last Save was performed.
  - **Back To List** – Press this button to go back to the Vendor Demographics | Authorizations page with previous results. If there is unsaved work the Save Confirmation notification appears.




- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

*Calculation(s):* None

*Background Process(es):*

- 1) The Final Deposit Date will default to Authorization End Date plus 12 months, if the Termination date is empty. When the Termination Date is entered the Final Deposit Date will default to Termination Date plus 12 months.
- 2) When the user enters disqualification information, a message will display stating “Disqualification Reason not allowed for this Authorization Status”, if the Status is not set to “SUSPENDED/DISQUALIFIED”.
- 3) When the termination information is entered, will display stating “Termination Reason not allowed for this Authorization Status”, if the Status is not set to “TERMINATED/DISQUALIFIED”.
- 4) The Final Deposit Date will now be sent to the bank instead of the Termination Date.
- 5) The system performs a three step save process when saving a new Vendor Demographics | Authorizations:
  - 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.
- 6) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

### 2.1.5 Vendor Edit: Demographics | Authorizations

From the Vendor Demographics | Authorization screen, the user can modify existing Authorization records by pressing the  (**Edit Icon**) within the Authorizations Grid. To the left of the screen, the Active Record denotes basic information regarding the Vendor. The Edit field definitions are the same as the Add page. See the Figure below for the Demographics | Authorizations Add screen for Vendor.

Navigation Path: *Vendor Lookup Search Results | Edit Icon | Demographics Authorizations Page*

*Figure: Vendor Demographics Authorizations Edit Page*

Calculation(s): None

Background Process(es):

- 1) The Final Deposit Date will default to Authorization End Date plus 12 months, if the Termination date is empty. When the Termination Date is entered the Final Deposit Date will default to Termination Date plus 12 months.
- 2) When the user enters disqualification information, a message will display stating “Disqualification Reason not allowed for this Authorization Status”, if the Status is not set to “SUSPENDED/DISQUALIFIED”.

- 3) When the termination information is entered, will display stating “Termination Reason not allowed for this Authorization Status”, if the Status is not set to “TERMINATED/DISQUALIFIED”.
- 4) The Final Deposit Date will now be sent to the bank instead of the Termination Date.
- 5) The system performs a three step save process when saving a new Vendor Demographics | Authorizations:
  - 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.
- 6) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

## 2.1.6 Vendor Add: Demographics | Contacts

After the initial save of a Vendor, the entered Contact information is populated under the Contacts tab. This information can be seen in the Vendor Contacts Result Grid. The user can use the Add button to add additional Contacts for a Vendor. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Demographics | Contacts Results Grid.



*Navigation Path: Vendor Lookup | Add Button | Demographics Contacts Page*

Contact Name	Title	Priority Level	Primary Phone Number
JEFF W DOE	D - MANAGER	Primary	(555) 555-2342

*Figure: Vendor Demographics Contacts Results Grid*

*Fields:*

- **Vendor Contacts Grid:**
  - **Contact Name** – The Contacts full name (First Name, Middle Initial, Last Name). This field is display only.
  - (**Edit Icon**) – When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
  - **Title** – The title of the person functioning as the Primary Contact such as Cashier, Clerk, Owner, or Manager. This field is display only.
  - **Priority Level** – Each Contact configured is given a Priority selection option such as Primary, Secondary, or Other. This field is display only.

- **Primary Phone Number** – This is the Phone Number associated with the Contact. This field is display only.
-  **(Delete Icon)** – When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Contact will remain in the Contact Grid. If Delete button is selected, the record will be removed. By clicking the  **(Close Window)**, the window is closed and no action is taken.

*Note:* The record will not be permanently removed until a Save is performed.



*Buttons:*

- **Add** – Press this button to add a new Contact to the Vendor within the HANDS system. See the Figure below for the Demographics | Contacts Edit screen for Vendor.



Navigation Path: Vendor Lookup / Add Button / Demographics Contacts Page / Add Button

The screenshot displays the 'Vendor Demographics Contacts Add Page'. The top navigation bar includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The 'Vendor' tab is active. The page title is '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH'. A 'Back to List' button is located at the top left. The form is divided into several sections:




- Owner Information:** 7461: GENERIC OWNER 1, Owner Phone: (555) 555-2277, Owner Address: 100 MAIN STREET, EL MIRAGE AZ 85335.
- Vendor Information:** 0890: GENERAL GROCERY, Vendor Status: AUTHORIZED (NEW), Vendor Phone: (555) 555-3261 ext. 123, Vendor Address: 110 MAIN STREET, IMMANUEL MISSION AZ 86514, Risk Level: MEDIUM TO HIGH RISK, Compliance Case: N/A.
- Contact Fields:**
  - \*Title: A dropdown menu.
  - \*Priority Level: Radio buttons for Primary, Secondary, and Other.
  - \*Last Name, \*First Name, and MI: Text input fields.
  - Start Date and End Date: Date input fields.
  - Contact Emails: A table with columns 'Email Address' and 'Priority', and an '+ Add' button. It currently shows 'No data to show'.
  - Contact Phones: A table with columns 'Phone Type', 'Phone Number', 'Ext.', and 'Priority', and an '+ Add' button. It currently shows 'No data to show'.

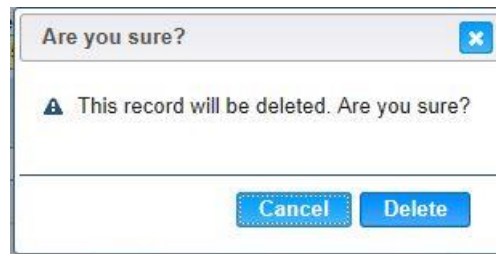
'Save' and 'Reset' buttons are located at the bottom right of the form.




Figure: Vendor Demographics Contacts Add Page

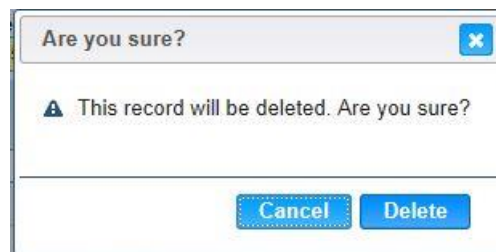
#### Fields:

- **Title** – The title of the person functioning as the Primary Contact such as Cashier, Clerk, Owner, or Manager. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is mandatory. For more information, please refer to the Sys Admin | System Base Tables for Contact Titles.
- **Priority Level** – Each Contact configured is given a Priority selection option such as Primary, Secondary, or Other. When Contacts are entered, one must be set as Primary. There can be only one Primary Contact and one Secondary Contact defined. There can be multiple Contacts with priority of Other. This selection option is mandatory.
- **Last Name** – The last name of the Contact. This field allows alphanumeric and special characters. This field is mandatory.
- **First Name** – The first name of the Contact. This field allows alphanumeric and special characters. This field is optional.
- **MI (Middle Initial)** – The middle initial of the Contact. This field allows up to 3 alphanumeric and special characters. This field is optional.
- **Start Date** – The starting date for the contact’s authority. This field is optional.

- **End Date** – The ending date for the Contact’s authority. This field is optional, but cannot be entered without the Start Date.
- **Contact Emails Grid :**
  - **Email Address** – The email address associated to the Contact. This field is display only.
  - **Priority** – Each Contact Email Address configured is given a Priority selection option such as Primary, Secondary, or Other. This field is display only.
  -  **(Edit Icon)** – When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
  -  **(Delete Icon)** – When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Phone information will remain in the Contact Phones Grid. If Delete button is selected, the record will be removed. By clicking the  **(Close Window)**, the window is closed and no action is taken.  
*Note:* The record will not be permanently removed until a Save is performed.

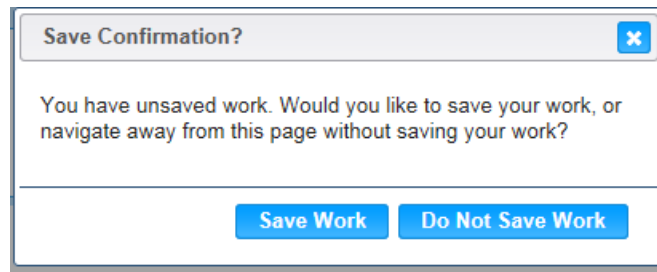


- **Contact Phones Grid:**
  - **Phone Type** – This field indicates the Phone Type of the Phone Number being added such as Cell, Home, or Work Phone. This field is display only.
  - **Phone Number** – This is the Phone Number associated with the Contact. This field is display only.
  - **Ext.** – The phone extension of the Contact, if applicable. This field is display only.
  - **Priority** – Each Contact Phone Number configured is given a Priority selection option such as Primary, Secondary, or Other. This field is display only.
  -  **(Edit Icon)** – When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
  -  **(Delete Icon)** – When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Phone information will remain in the Contact Phones Grid. If Delete button is selected, the record will be removed. By clicking the  **(Close Window)**, the window is closed and no action is taken.  
*Note:* The record will not be permanently removed until a Save is performed.




**Buttons:**

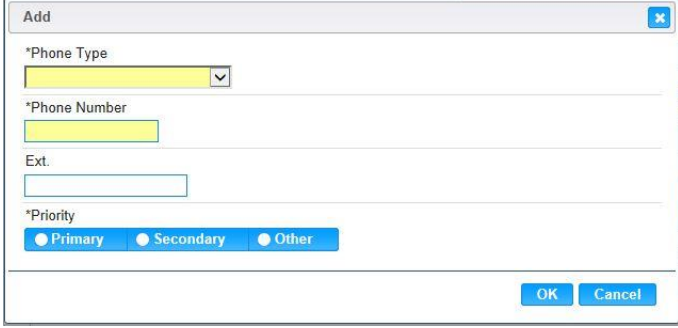
- **Save** – Press this button to save any modifications made to the Contact record.
- **Reset** – Press this button to undo any modifications made to the Contact record since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Demographics | Contacts page with previous results. If there is unsaved work the Save Confirmation notification appears.




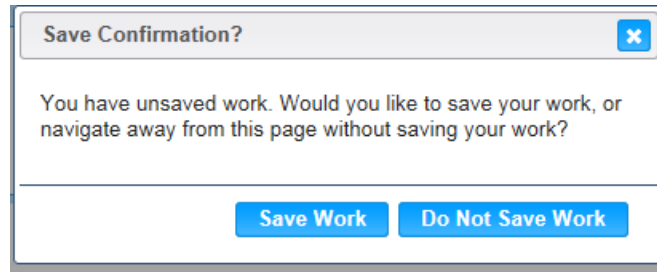
- **X (Close Window)** – The window is closed and no action is taken.
  - **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
  - **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.
- **Contact Emails:**
    - **+ Add (Add)** – Press this button to bring up the Add Email Modal.

- **X (Close Window)** – By clicking this button, the window is closed and no action is taken.
- **Email Address** – The email address associated to the Contact. The system will allow for multiple email address for the vendor. The e-mail address must follow the standard syntax of an email address consisting of localpart@domain. Example: [niceandsimple@example.com](mailto:niceandsimple@example.com). This field is mandatory.
- **Priority** – Each Contact Email Address configured is given a Priority selection option such as Primary, Secondary, or Other. If Contact Email Addresses are entered, one must be set as Primary. There can be only one Primary Contact Email Address and one Secondary Contact Email Address defined. There can be multiple Phone Numbers with priority of Other. This selection option is mandatory.
- **OK** – Press this button after all fields are completed.

- **Cancel** – Press this button to close the Add Email Modal and return to the Contact Edit without saving any Contact Email fields entered.
- **Contact Phones:**
  -  **(Add)** – Press this button to bring up the Add Phone Modal.



-  **(Close Window)** – By clicking this button, the window is closed and no action is taken.
- **Phone Type** – This field indicates the Phone Type of the Phone Number being added such as Cell, Home, or Work Phone. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the system assigned Phone Type ID, which will also highlight possible completions for Phone Type. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | System Base Tables for Phone Types. This field is mandatory.
- **Phone Number** – This is the Phone Number associated with the Contact. This field must contain 10 numeric digits. The user does not need to input any special formatting, such as parentheses or dash. This field is mandatory.
- **Ext.** – The phone extension of the Contact, if applicable. The Phone Extension must be numeric and contain no more than 5 digits. This field is optional.
- **Priority** – Each Phone Number configured is given a Priority selection option such as Primary, Secondary, or Other. When Phone Numbers are entered, one must be set as Primary. There can be only one Primary Phone Number and one Secondary Phone Number defined. There can be multiple Phone Numbers with priority of Other. This selection option is mandatory.
- **OK** – Press this button after all fields are completed.
- **Cancel** – Press this button to close the Add Phone Modal and return to the Contact Edit without saving any Phone Number fields entered.
- **Save** – Press this button to save any modifications made to the Contact record.
- **Reset** – Press this button to undo any modifications made to the Contact record since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Demographics | Contacts page with previous results. If there is unsaved work the Save Confirmation notification appears.

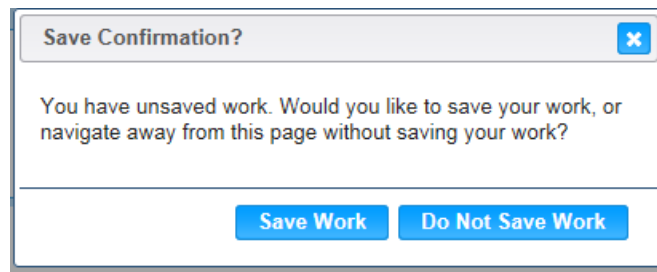


- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Owner Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Owner Lookup main page.

*Calculation(s):* None


*Background Process(es):*

- 1) The system performs a three step save process when saving modifications to the Vendor Demographics | Contacts:
  - 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
- 3) If the user attempts to navigate off the Vendor Demographics | Contacts page without saving any modifications, the Save Confirmation notification appears.

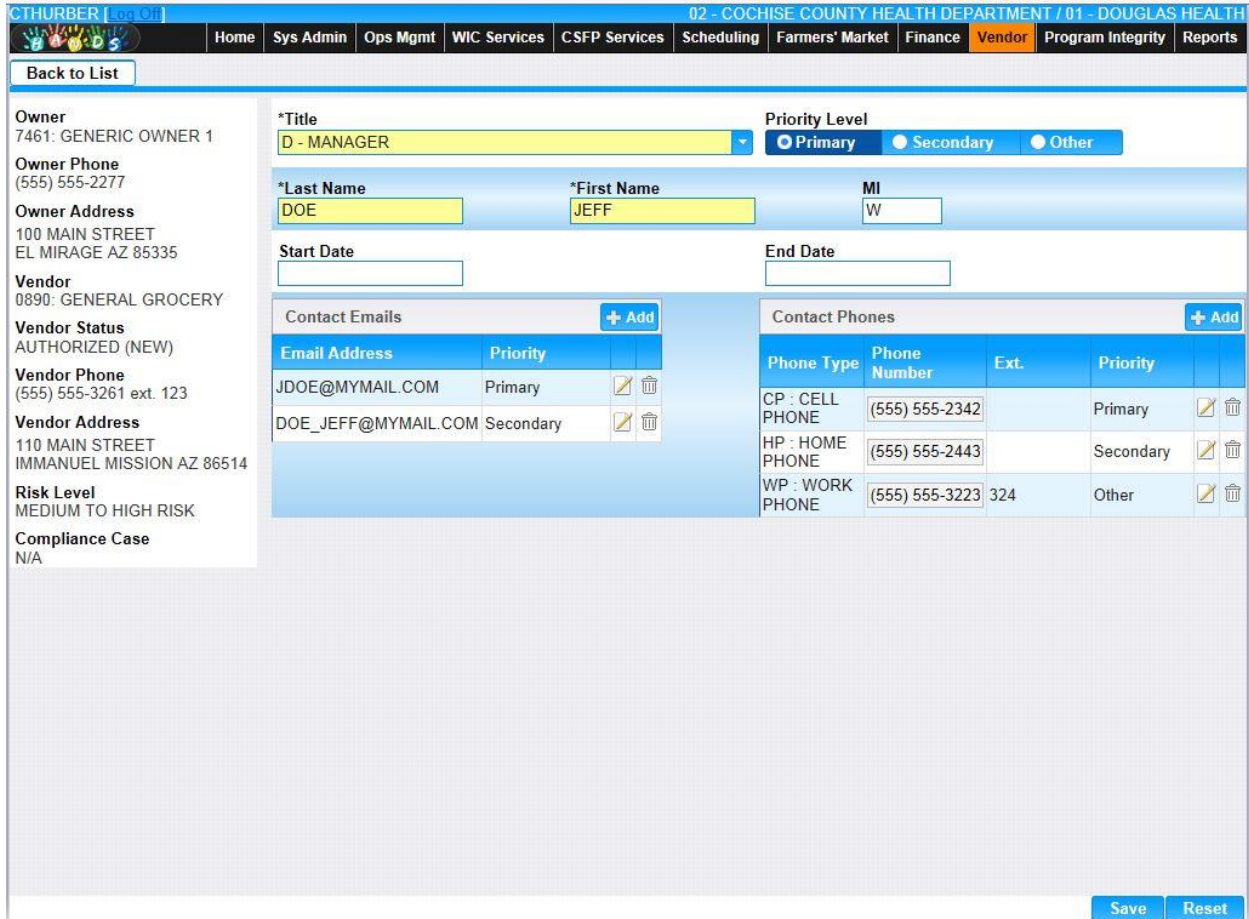


- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

### 2.1.7 Vendor Edit: Demographics | Contacts

The information within the Vendor Contacts Result Grid can be modified by pressing the  (**Edit Icon**) within the Search Grid. To the left of the screen, the Active Record denotes basic information regarding the Vendor. The Edit field definitions are the same as the Add page. See the Figure below for the Demographics | Contacts Edit page.

Navigation Path: Vendor Lookup Search Results | Edit Icon | Demographics Contacts Page | Edit Icon



**Owner**  
7461: GENERIC OWNER 1  
**Owner Phone**  
(555) 555-2277  
**Owner Address**  
100 MAIN STREET  
EL MIRAGE AZ 85335  
**Vendor**  
0890: GENERAL GROCERY  
**Vendor Status**  
AUTHORIZED (NEW)  
**Vendor Phone**  
(555) 555-3261 ext. 123  
**Vendor Address**  
110 MAIN STREET  
IMMANUEL MISSION AZ 86514  
**Risk Level**  
MEDIUM TO HIGH RISK  
**Compliance Case**  
N/A

**\*Title**  
D - MANAGER  
**Priority Level**  
 Primary  Secondary  Other

**\*Last Name**  
DOE  
**\*First Name**  
JEFF  
**MI**  
W

**Start Date**  
  
**End Date**

Contact Emails				Contact Phones			
Email Address	Priority			Phone Type	Phone Number	Ext.	Priority
JDOE@MYMAIL.COM	Primary			CP : CELL PHONE	(555) 555-2342		Primary
DOE_JEFF@MYMAIL.COM	Secondary			HP : HOME PHONE	(555) 555-2443		Secondary
				WP : WORK PHONE	(555) 555-3223	324	Other

**Save** **Reset**

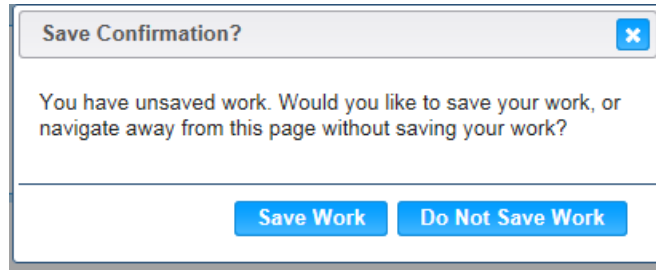
Figure: Vendor Demographics Contacts Edit Page

Calculation(s): None

Background Process(es):


- 1) The system performs a three step save process when saving modifications to the Vendor Demographics | General:
  - 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.

- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
- 3) If the user attempts to navigate off the Vendor Demographics | General page without saving any modifications, the Save Confirmation notification appears.

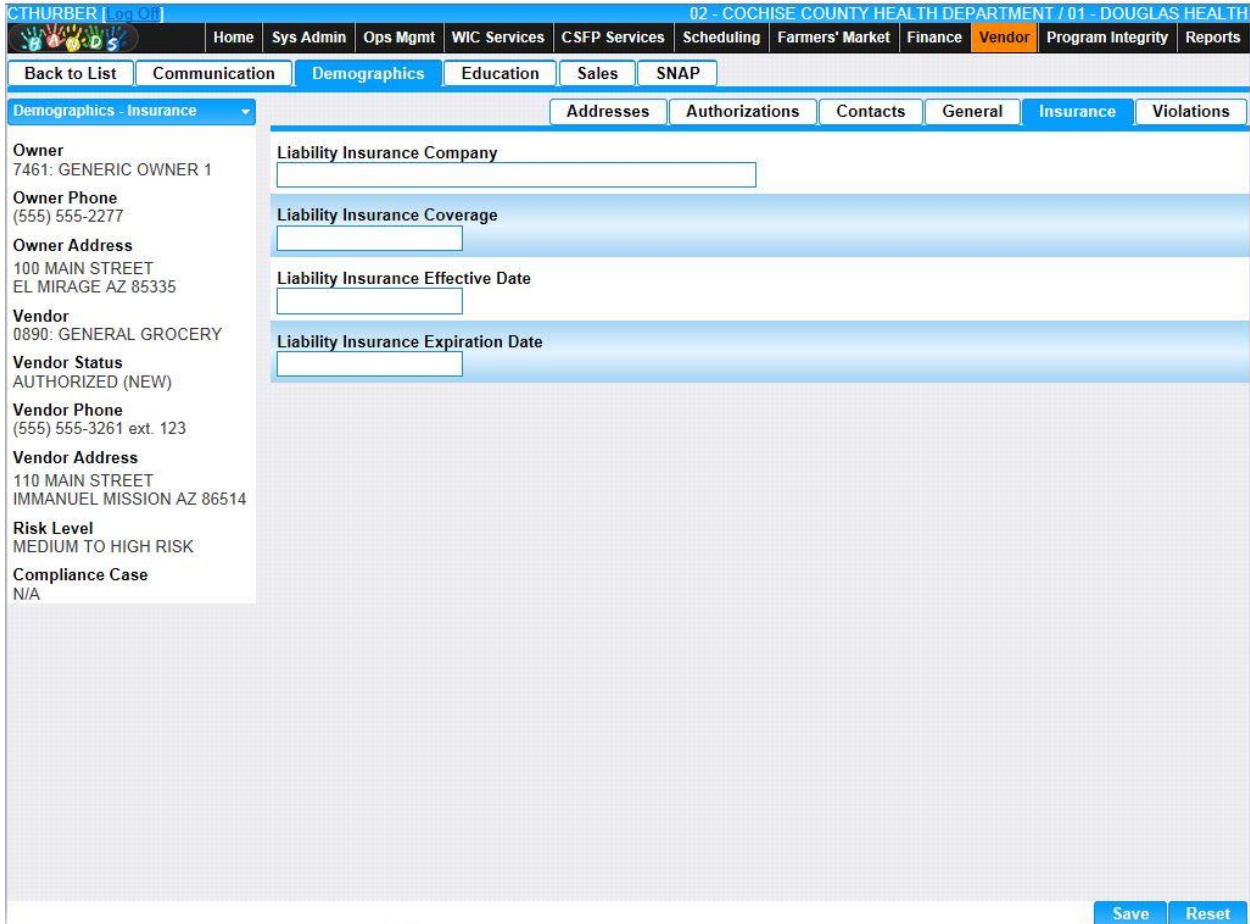


- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

## 2.1.8 Vendor Edit: Demographics | Insurance

The information for Demographics Insurance can be added or modified by pressing the  (**Edit Icon**) within the Search Grid. Left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Demographics | Contacts Edit page.

*Navigation Path: Vendor Lookup Search Results | Edit Icon | Demographics Insurance Page*



*Figure: Vendor Demographics Insurance Edit Page*

### Fields:

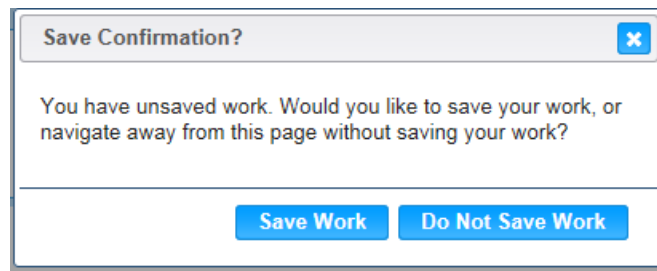
- **Liability Insurance Company** – The name of the company providing Liability Insurance for the Vendor. This field accepts alphanumeric and special characters. This field is mandatory if any of the other Liability Insurance fields are filled.
- **Liability Insurance Coverage** – The amount of coverage provided by the Insurance. This field must be a number. This field is mandatory if the Liability Insurance Company is filled in.
- **Liability Insurance Effective Date** – The starting date of the Liability Insurance held by the Vendor. The Liability Insurance Effect Date is entered in format MM/DD/YYYY. This field is mandatory if the Liability Insurance Company is filled in.



- **Liability Insurance Expiration Date** – The ending date of the Liability Insurance held by the Vendor. The Liability Insurance Expiration Date is entered in format MM/DD/YYYY. This field is mandatory if the Liability Insurance Company is filled in.

*Buttons:*

- **Save** – Press this button to save any modifications made to the Insurance record.
- **Reset** – Press this button to undo any modifications made to the Insurance record since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Demographics | Insurance page with previous results. If there is unsaved work the Save Confirmation notification appears.



- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

*Calculation(s):* None

*Background Process(es):*

- 1) The system performs a three step save process when saving a new Vendor Demographics | Insurance:
  - 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

## 2.1.9 Vendor Add: Demographics | Violations

Health Violations can be added for the vendor under the Violations page. Any previous Health Violation will appear in the Vendor Health Violations Result Grid on this page. The user cannot edit the Health Violations after they have been added, but they may be deleted. The user can add a new Health Violation by pressing the **+ Add** (**Add**) button above the Vendor Health Violations Result Grid. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Demographics | Violations Results Grid.


*Navigation Path: Vendor Lookup / Add Button / Demographics Insurance Page*

The screenshot displays the 'Vendor Demographics Violations Add Page'. The top navigation bar includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. Below this, a secondary menu shows 'Back to List', 'Communication', 'Demographics', 'Education', 'Sales', and 'SNAP'. The main interface is divided into sections: 'Demographics - Violations' (with sub-tabs for 'Addresses', 'Authorizations', 'Contacts', 'General', 'Insurance', and 'Violations'), a sidebar for 'Owner' and 'Vendor' details, and a 'Vendor Health Violations' table. The table has columns for 'Health Violation Code' and 'Violation Date' and currently shows 'No data to show'. A '+ Add' button is located at the top right of the table. At the bottom right, there are 'Save' and 'Reset' buttons.

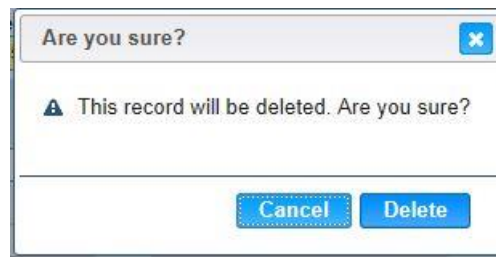
*Figure: Vendor Demographics Violations Add Page*

*Fields:*

- **Vendor Health Violations Grid:**
  - **Health Violation Code** – The health violation code of the violation committed, and the violation description. This field is display only.
  - **Violation Date** – The date that this health violation was noted. This field is display only.
  - **🗑️ (Delete Icon)** – Once a record has been added, the Delete Icon will be enabled. When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Violation will remain in the Vendor Health Violations Grid.

If Delete button is selected, the record will be removed. By clicking the  (**Close Window**), the window is closed and no action is taken.

*Note:* The record will not be permanently removed until a Save is performed.



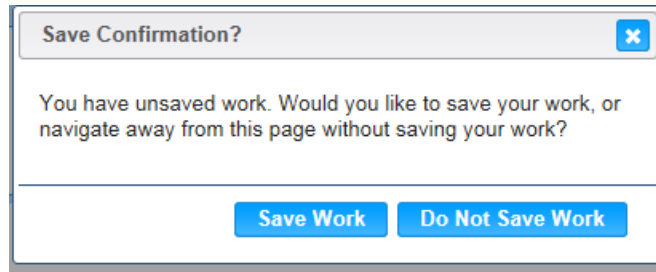
*Buttons:*

- **Vendor Health Violations:**

-  (**Add**) – Press this button to bring up the Add Health Violations Modal.



- **Health Violation Code** – The type of health code violation committed along with the description. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. For more information, please refer to the Sys Admin | Vendor Base Tables for Violation Codes. This field is mandatory.
- **Violation Date** – The date that this health violation was noted. This field is mandatory if the Health Violation Code is entered.
- **OK** – Press this button after all fields are completed.
- **Cancel** – Press this button to close the Add Health Violation Modal and return to the Vendor Health Violations Grid without saving any Health Violation fields entered.
- **Save** – Press this button to save the new Health Violation record.
- **Reset** – Press this button to undo any modifications made to the Health Violation record since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Demographics | Violations page with previous results. If there is unsaved work the Save Confirmation notification appears.





- **x (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

*Calculation(s):* None

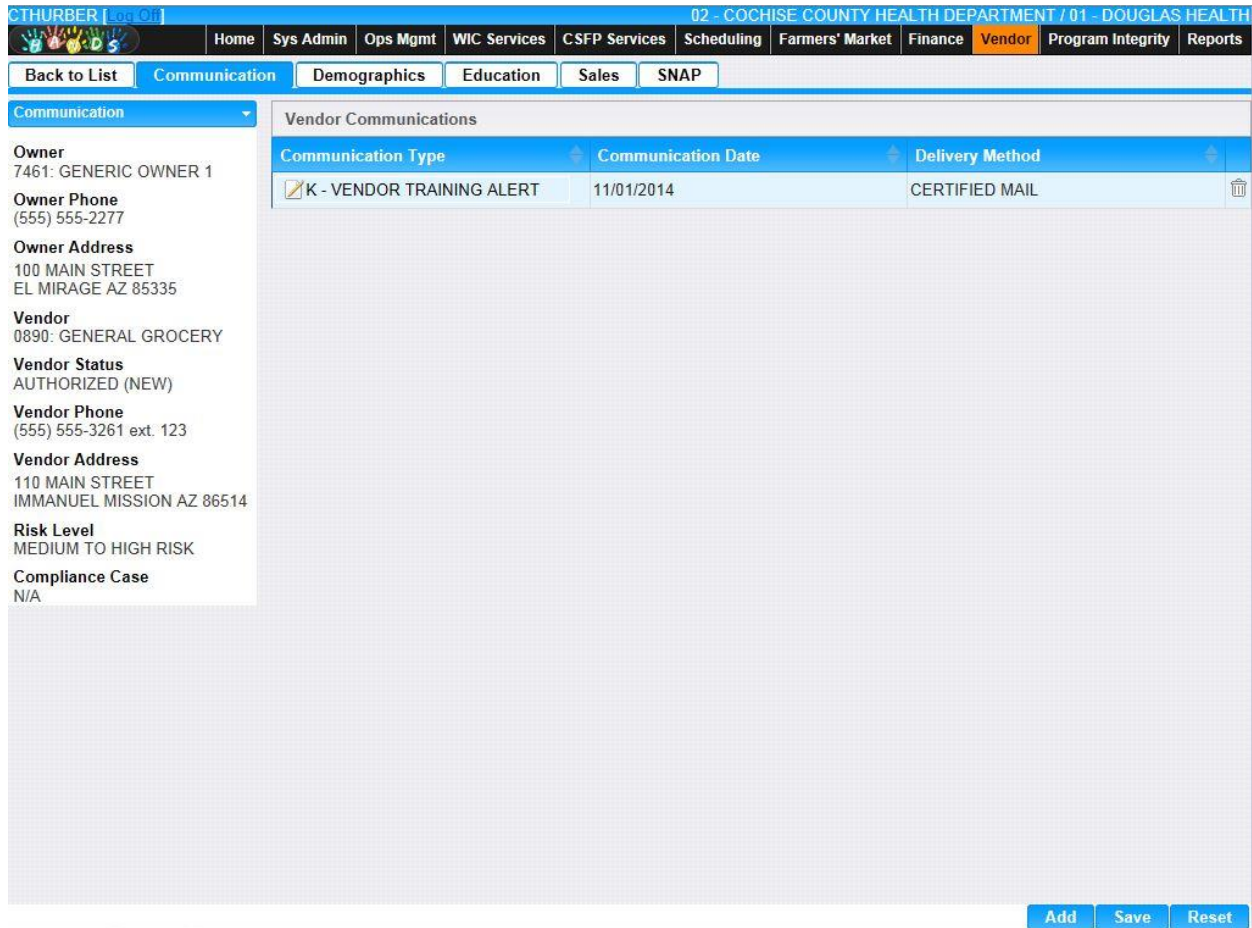
*Background Process(es):*



- 1) The system performs a three step save process when saving a new Vendor Demographics | Violations:
  - 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
- 3) When a Health Violation is filled in, the Health Violations check box on the Demographics window is checked.

## 2.2 Vendor Communication

The Vendor Communication page is used to track correspondence sent to the Vendor. All previous Communications will be present in the Vendor Communications Result Grid. A user can update information concerning an existing Communication by pressing the  (**Edit Icon**) next to the Communication Type. A user can only remove a Communication on the day of its creation by pressing the  (**Delete**) found at the right of the Result Grid. See the Figure below for the Communication Results Grid.


*Navigation Path: Vendor Lookup Search Results / Edit Icon / Communication Page*





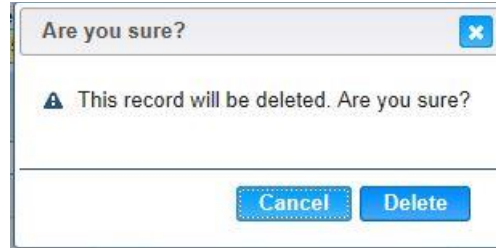
Communication Type	Communication Date	Delivery Method
 K - VENDOR TRAINING ALERT	11/01/2014	CERTIFIED MAIL 

*Figure: Vendor Communication Result Grid with Results*

*Vendor Communication Result Grid Fields:*

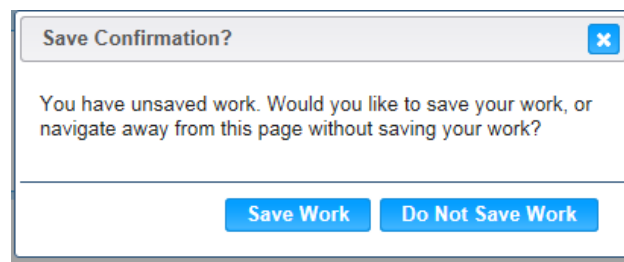
-  (**Edit Icon**) – When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing. See Section 2.2.1 for Edit details.
- **Communication Type** – This field indicates the type of Communication such as Complaint Response, Missing Application Information, or Supply Request Letter. This field is display only.
- **Communication Date** – The date of the Communication. This field is display only.
- **Delivery Method** – The manner in which the Communication was sent such as Certified, Certificate of Mailing, or Electronic Media. This field is display only.


-  **(Delete Icon)** – When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Communication information will remain in the Communications Grid. If Delete button is selected, the record will be removed. By clicking the  **(Close Window)**, the window is closed and no action is taken.  
*Note:* The record will not be permanently removed until a Save is performed.



*Buttons:*

- **Add** – Press this button to add a new Communication to the HANDS system.
- **Save** – Press this button to save the Communication record.
- **Reset** – Press this button to undo any modifications made to the Communication record since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Communication Results page with previous results. If there is unsaved work the Save Confirmation notification appears.



-  **(Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Communication Results page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Communication Result main page.

*Calculation(s):* None

*Background Process(es):* None

## 2.2.1 Vendor Add: Communication

A new Communication can be recorded within the HANDS system by pressing the Add button on the Communication page. After the Communication has been successfully saved, the information can be seen in the Vendor Communication Result Grid. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Vendor Communication Add page.

*Navigation Path: Vendor Lookup | Add Button | Communication | Add*

The screenshot shows the 'Vendor Communication Add Page' in the HANDS system. The navigation menu at the top includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The 'Vendor' menu item is highlighted. The page is divided into two main sections. On the left, there is a sidebar with vendor information for '0890: GENERAL GROCERY', including owner details, phone, address, status, and risk level. On the right, there is a form for adding a communication. The form includes fields for '\*Communication Type' (a dropdown menu), '\*Contact Date' (a text input), '\*Delivery Method' (a dropdown menu set to '1 - FIRST CLASS MAIL'), 'Certified Mail Date', 'Certificate of Mailing Date', and 'Grn Card Rcpt Date'. Below these fields is a large text area for 'Comment'. At the bottom right of the form, there are 'Save' and 'Reset' buttons.

*Figure: Vendor Communication Add Page*

### Fields:

- **Communication Type** – This field indicates the type of communication such as Complaint Response, Missing Application Information, or Supply Request Letter. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the assigned character Comm Type Code, which will also show possible completions for Communication Type. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | Vendor Base Tables for Communication Types. This field is mandatory.
- **Contact Date** – The date of the communication. The Contact Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when

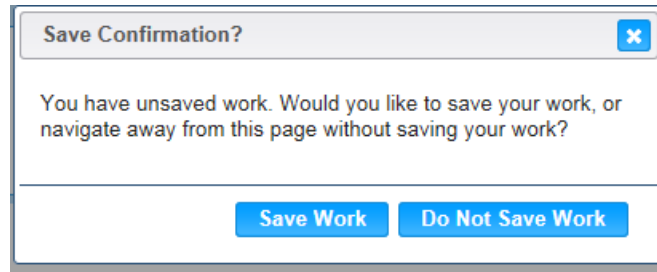
manually entering the Contact Date. The user may also select the Contact Date using the provided Calendar which appears when the field is entered. This is a mandatory field.

- **Delivery Method** – The manner in which the communication was sent such as Certified, Certificate of Mailing, or Electronic Media. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the assigned character Delivery Method, which will also show possible completions for Delivery Method. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | Vendor Base Tables for Delivery Types. This field is mandatory.
- **Certified Mail Date** – The date that the certified mail was sent. This field is mandatory if the Type of Mail is “Certified Mail”. Sending an item by certified mail assures that an item is sent, and it results in a green card being returned when the item is received. The Certified Mail Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Certified Mail Date. The user may also select the Certified Mail Date using the provided Calendar which appears when the field is entered.
- **Certificate of Mailing Date** – The date the communication was sent by certificate of mailing. The certificate of mailing assures that an item is sent, but does not result in the return of a green card. The Certified Mail Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Certified Mail Date. The user may also select the Certified Mail Date using the provided Calendar which appears when the field is entered.
- **Grn Card Rcpt Date** – The date that the Green Card Receipt was returned if the communication was sent via Certified Mail. The Green Card Receipt Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Green Card Receipt Date. The user may also select the Green Card Receipt Date using the provided Calendar which appears when the field is entered. This field is optional.
- **Comment** – The user may enter a comment about the communication. This field accepts up to 2000 alphanumeric and special characters. All comment text will be converted automatically to upper case. This field is optional.

*Buttons:*

- **Save** – Press this button to save the Communication record.
- **Reset** – Press this button to undo any modifications made to the Communication record since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Communication Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.






- **x** (Close Window) – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Communication Results page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Communication Result main page.

*Calculation(s):* None

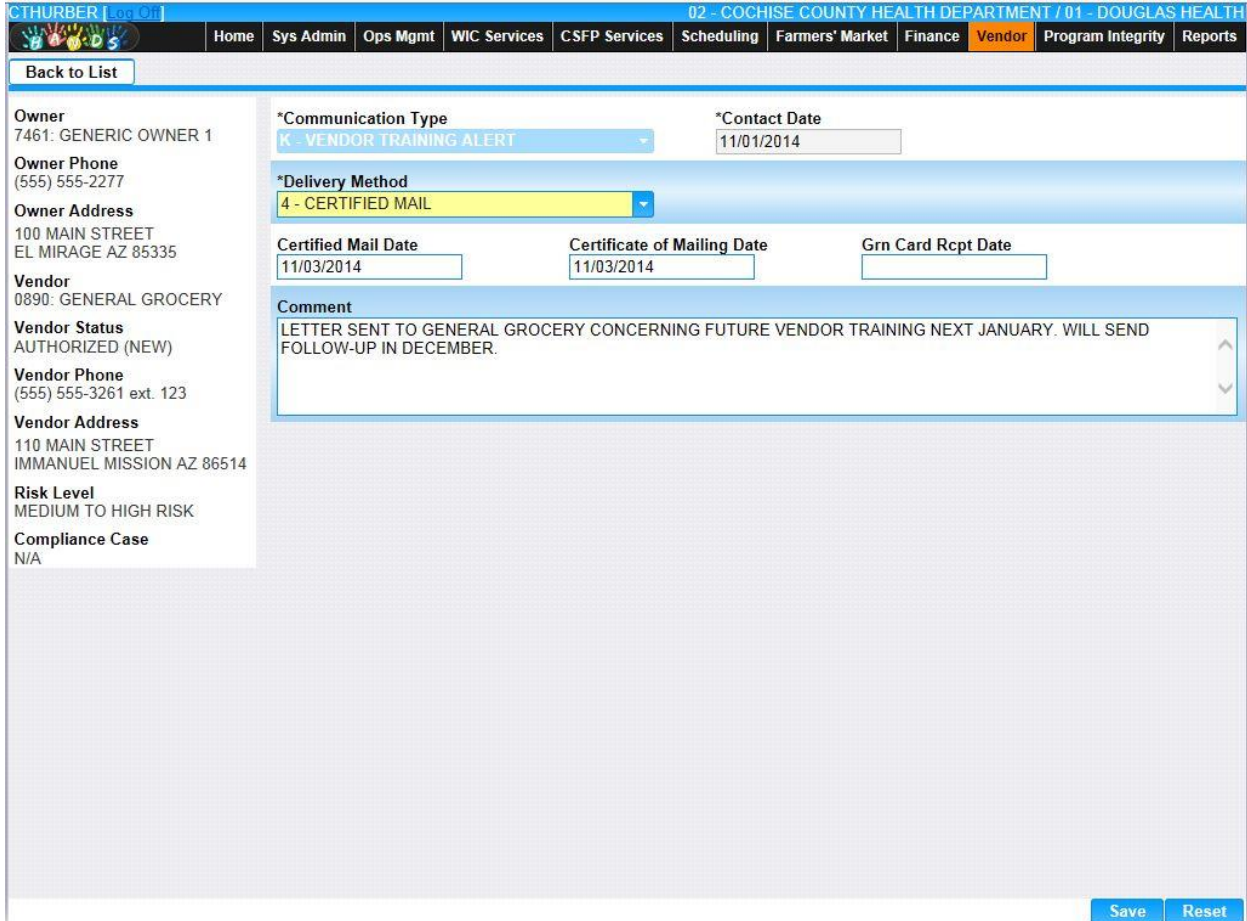
*Background Processes:*

- 1) The system performs a three step save process when saving a new Vendor Communications:
  - 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

## 2.2.2 Vendor Edit: Communication

An existing Communication can be modified within the HANDS system by pressing the  (**Edit Icon**) within the Vendor Communication Result Grid. To the left of the screen, the Active Record denotes basic information regarding the Vendor. The Edit field definitions are the same as the Add page. See the Figure below for the Vendor Communication Edit page.

*Navigation Path: Vendor Lookup Search Results | Edit Icon | Communication | Edit Icon*



**Owner**  
7461: GENERIC OWNER 1

**Owner Phone**  
(555) 555-2277

**Owner Address**  
100 MAIN STREET  
EL MIRAGE AZ 85335

**Vendor**  
0890: GENERAL GROCERY

**Vendor Status**  
AUTHORIZED (NEW)

**Vendor Phone**  
(555) 555-3261 ext. 123

**Vendor Address**  
110 MAIN STREET  
IMMANUEL MISSION AZ 86514

**Risk Level**  
MEDIUM TO HIGH RISK

**Compliance Case**  
N/A

**\*Communication Type**  
K - VENDOR TRAINING ALERT

**\*Contact Date**  
11/01/2014

**\*Delivery Method**  
4 - CERTIFIED MAIL

**Certified Mail Date**  
11/03/2014

**Certificate of Mailing Date**  
11/03/2014

**Grn Card Rcpt Date**

**Comment**  
LETTER SENT TO GENERAL GROCERY CONCERNING FUTURE VENDOR TRAINING NEXT JANUARY. WILL SEND FOLLOW-UP IN DECEMBER.

**Save** **Reset**

*Figure: Vendor Communication Edit Page*



*Calculation(s):* None

*Background Processes:*

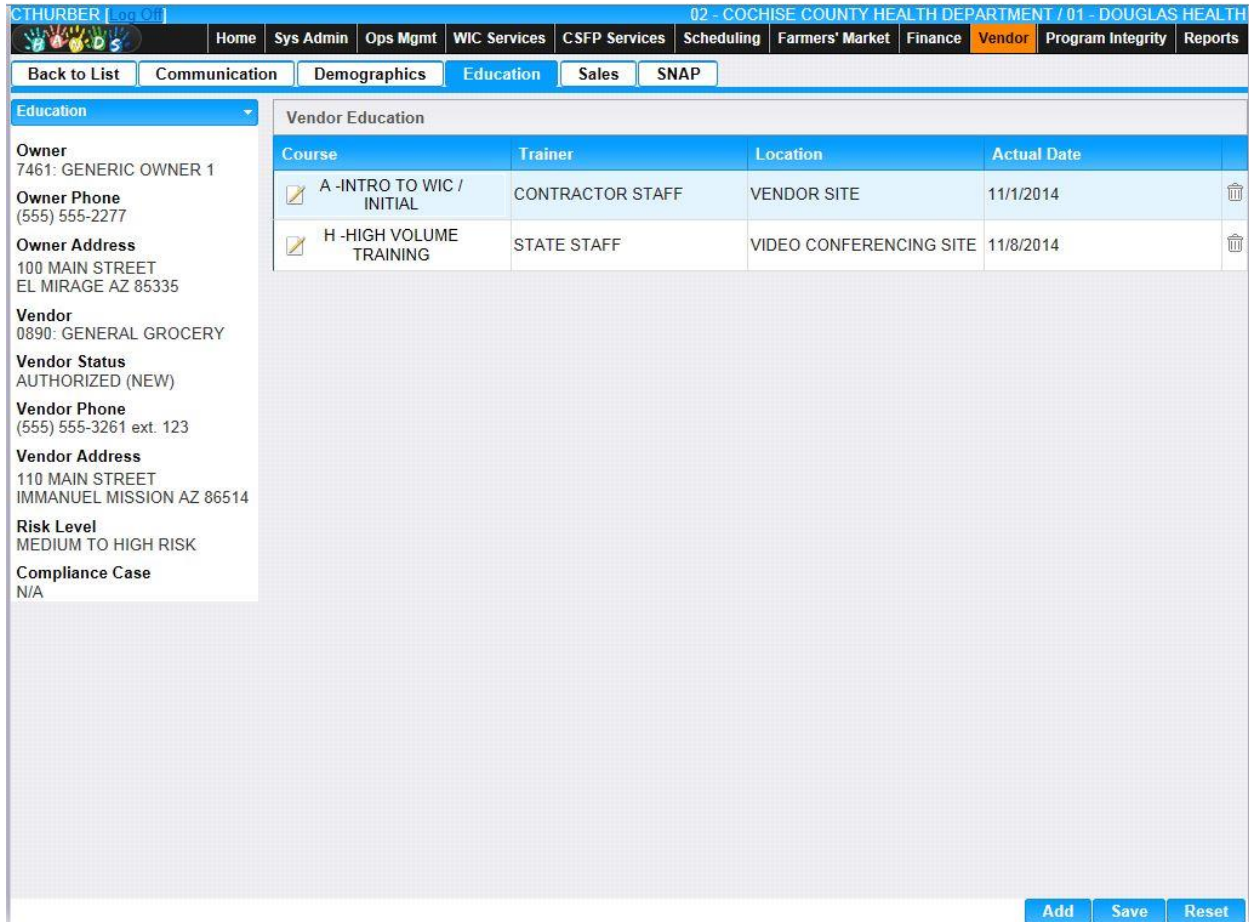
- 1) The system performs a three step save process when saving a new Vendor Communications:
  - a) First, it ensures all mandatory fields are populated with data. If not the save process will stop and an error message will be thrown.
  - b) Second, it ensures all fields have proper data entered (i.e. 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.

- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

### 2.3 Vendor Education

The Vendor Education page is used to track education classes provided to the Vendor. All previous Education will be present in the Vendor Education Result Grid. A user can update information concerning an existing Education by pressing the  (**Edit Icon**) next to the Course Name. A user can only remove an Education record on the day of its creation by pressing the  (**Delete**) found at the right of the Result Grid. See the Figure below for the Education Results Grid.

Navigation Path: Vendor Lookup Search Results / Edit Icon / Education Page








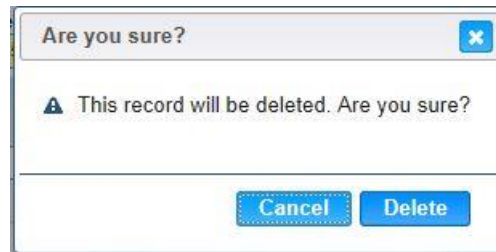
Course	Trainer	Location	Actual Date
 A -INTRO TO WIC / INITIAL	CONTRACTOR STAFF	VENDOR SITE	11/1/2014
 H -HIGH VOLUME TRAINING	STATE STAFF	VIDEO CONFERENCING SITE	11/8/2014

Figure : Vendor Education Result Grid with Results

Vendor Education Result Grid Fields:

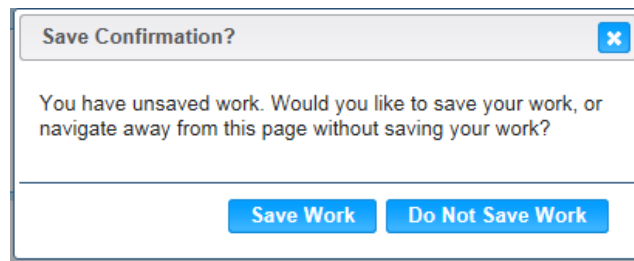
-  (**Edit Icon**) – When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
- **Course** – This field indicates the type of Course such as Intro to WIC, High Volume Training, or Annual Training Alert. This field is display only.
- **Trainer** – The person who performed the training, such as State Staff or Contractor Staff. This field is display only.
- **Location** – The site where the training was performed such as Vendor Site, State Agency Site, or Video Conferencing Site. This field is display only.


- **Actual Date** – The date the education was provided. This field is display only.
-  **(Delete Icon)** – When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Education information will remain in the Education Grid. If Delete button is selected, the record will be removed. By clicking the  **(Close Window)**, the window is closed and no action is taken.  
*Note:* The record will not be permanently removed until a Save is performed.



*Buttons:*

- **Add** – Press this button to add a new Education to the HANDS system.
- **Save** – Press this button to save the Education record.
- **Reset** – Press this button to undo any modifications made to the Education record since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Education Results page with previous results. If there is unsaved work the Save Confirmation notification appears.



-  **(Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Communication Results page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Communication Result main page.

*Calculation(s):* None

*Background Process(es):* None

### 2.3.1 Vendor Add: Education

A new Education can be recorded within the HANDS system by pressing the Add button on the Education page. After the Education has been successfully saved, the information can be seen in the Vendor Education Result Grid. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Vendor Education Add page.

*Navigation Path: Vendor Lookup | Add Button | Education Page | Add*

The screenshot displays the 'Vendor Education Add Page' interface. At the top, a navigation bar includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The 'Vendor' tab is active. Below the navigation bar is a 'Back to List' button. The main content area is divided into two sections. On the left, a sidebar displays vendor details for 'GENERAL GROCERY', including owner information, phone numbers, addresses, status ('AUTHORIZED (NEW)'), risk level ('MEDIUM TO HIGH RISK'), and compliance case ('N/A'). The right section contains the education form with the following fields: '\*Course' (dropdown), '\*Trainer' (dropdown), '\*Location' (dropdown), '\*Actual Date' (text input), 'Actual Attendance' (text input), 'Test Score' (text input), 'Date of the Test Score' (text input), and a 'Comment' text area. At the bottom right, there are 'Save' and 'Reset' buttons.

*Figure: Vendor Education Add Page*

#### Fields:

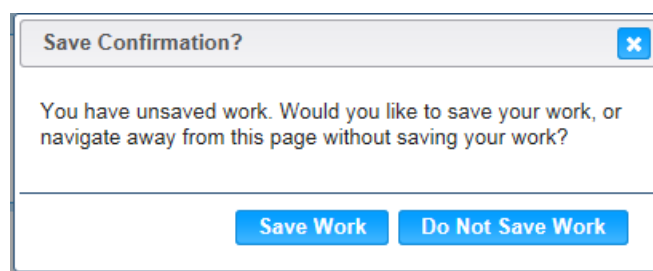
- **Course** – This field indicates the type of Course such as Intro to WIC, High Volume Training, or Annual Training Alert. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the assigned character Ed Course Code, which will also show possible completions for Education Type. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | Vendor Base Tables for Education Courses. This field is mandatory.
- **Trainer** – The person who performed the training, such as State Staff or Contractor Staff. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list.

Alternatively, the user can enter the assigned character Ed Trainer, which will also show possible completions for Education Trainers. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | Vendor Base Tables for Education Trainers. This field is mandatory.

- **Location** – The site where the training was performed such as Vendor Site, State Agency Site, or Video Conferencing Site. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the assigned character Ed Location, which will also show possible completions for Education Locations. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | Vendor Base Tables for Education Locations. This field is mandatory.
- **Actual Date** – The date the education was provided. The Actual Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Actual Date. The user may also select the Actual Date using the provided Calendar which appears when the field is entered. This is a mandatory field.
- **Actual Attendance** – The number of individuals who actually attended the course. This field must be a numeric value. The field is mandatory if the Actual Date has been specified.
- **Test Score** – The score that the attendees received. This field must be a numeric value between 0 and 999. This field is optional.
- **Date of Test Score** – The date the test was given. The Date of Test Score is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Date of Test Score. The user may also select the Date of Test Score using the provided Calendar which appears when the field is entered. This field is optional.
- **Comment** – The user may enter a comment about the education. This field accepts up to 2000 alphanumeric and special characters. All comment text will be converted automatically to upper case. This field is optional.

*Buttons:*

- **Save** – Press this button to save the Education record.
- **Reset** – Press this button to undo any modifications made to the Education record since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Education Results Grid with previous results. If there is unsaved work the Save Confirmation notification appears.



- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Education Results page.

- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Education Result main page.


*Calculation(s):* None

*Background Processes:*

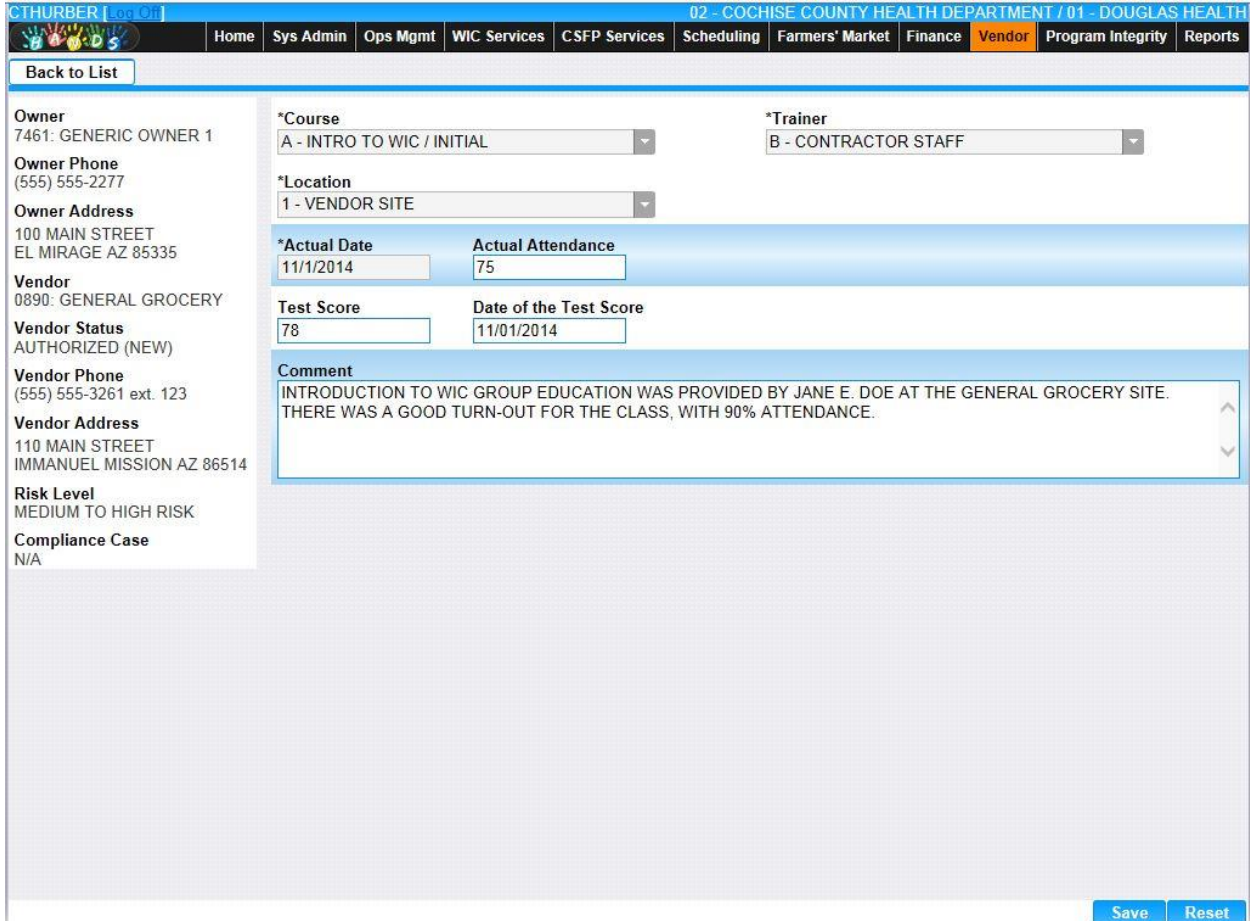
- 1) The system performs a three step save process when saving a new Vendor Education:
  - d) First, it ensures all mandatory fields are populated with data. If not the save process will stop and an error message will be thrown.
  - e) Second, it ensures all fields have proper data entered (i.e. Fields 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.
  - f) 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.



### 2.3.2 Vendor Edit: Education

An existing Education can be modified within the HANDS system by pressing the  (**Edit Icon**) within the Vendor Education Result Grid. To the left of the screen, the Active Record denotes basic information regarding the Vendor. The Edit field definitions are the same as the Add page. See the Figure below for the Vendor Education Edit page.

*Navigation Path: Vendor Lookup Search Results / Edit Icon / Education Page / Edit Icon*



The screenshot displays the 'Vendor Education Edit Page' within the HANDS WIC System. The interface includes a navigation bar at the top with the following menu items: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor (highlighted), Program Integrity, and Reports. Below the navigation bar is a 'Back to List' button. The main content area is split into two columns. The left column contains vendor information: Owner (7461: GENERIC OWNER 1), Owner Phone ((555) 555-2277), Owner Address (100 MAIN STREET, EL MIRAGE AZ 85335), Vendor (0890: GENERAL GROCERY), Vendor Status (AUTHORIZED (NEW)), Vendor Phone ((555) 555-3261 ext. 123), Vendor Address (110 MAIN STREET, IMMANUEL MISSION AZ 86514), Risk Level (MEDIUM TO HIGH RISK), and Compliance Case (N/A). The right column contains the education details form: \*Course (A - INTRO TO WIC / INITIAL), \*Trainer (B - CONTRACTOR STAFF), \*Location (1 - VENDOR SITE), \*Actual Date (11/1/2014), Actual Attendance (75), Test Score (78), Date of the Test Score (11/01/2014), and a Comment field with the text: 'INTRODUCTION TO WIC GROUP EDUCATION WAS PROVIDED BY JANE E. DOE AT THE GENERAL GROCERY SITE. THERE WAS A GOOD TURN-OUT FOR THE CLASS, WITH 90% ATTENDANCE.' At the bottom right of the form are 'Save' and 'Reset' buttons.

**Figure: Vendor Education Edit Page**

*Calculation(s):* None

*Background Processes:*

- 1) The system performs a three step save process when saving a new Vendor Education:
  - 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.

- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

## 2.4 Vendor Sales

The user must specify Sales information for each Vendor. There are multiple sections under the Sales page: Banks, General, Infant Formula, Store Operations, Wholesaler, and Wholesaler Foods.

### 2.4.1 Vendor Add: Sales | General

The first page displayed is the General page. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Sales | General Add screen for Vendor.

Navigation Path: Vendor Lookup | Add Button | Sales Page | General Page

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

**Sub-Menu:** Back to List, Communication, Demographics, Education, Sales, SNAP

**Section:** Sales - General (Banks, General, Infant Formula, Store Operations, Wholesaler, Wholesaler Food)

**Vendor Information (Left Sidebar):**  
 Owner: 7496: Heather Purdy  
 Owner Phone: (555) 555-5555  
 Owner Address: 22 Water Street, PHOENIX AZ 85003  
 Vendor: 0032: Local Grocer  
 Vendor Status: AUTHORIZED (NEW)  
 Vendor Phone: (555) 555-5555  
 Vendor Address: 2 Outlet Road, PHOENIX AZ 85003  
 Risk Level: LOW RISK  
 Compliance Case: N/A

**Main Form Fields:**  
 Vendor Name: LOCAL GROCER  
 \*Please select the value which best describes your outlet: SMALL RURAL INDEP (< \$750,000 GROSS SALES)  
 Enter outlet's individual annual gross receipts/sales: Actual (Selected), Estimated  
 Gross \$: 85,000.00 | \*Food \$: 50,000.00 | \*Alcohol \$: 0.00 | \*Tobacco \$: 10,000.00  
 \*Lottery \$: 5,000.00 | Fuelage \$: | Other Sales \$: | General Merchandise \$:  
 \*Fiscal Year for Above Figures: 2015  
 Of the annual food sales above (Food \$), enter dollar amounts for the following:  
 \*Cash \$: 50,000.00 | Credit \$: | \*SNAP \$: 7,500.00 | \*WIC \$: 7,500.00  
 Will more than 50% of your annual revenue from the sale of food items come from WIC food instruments? [Yes] [No]  
 If yes, do you provide or plan to provide incentive items to the WIC program customers? [Yes] [No]  
 Does the outlet's checkout registers use optical scanning devices which record product and price information on the customer receipts? [Yes] [No]  
 If yes, number of POS Terminals: | If yes, number of Optical Terminals: |  
 If yes, can the system be programmed to detect WIC Authorized vs. Non-Authorized products? [Yes] [No]  
 \*How do you decide how much WIC stock to order? Order a certain amount of each item  
 Explain Other:  
 \*How often are the Dairy cases Restocked? DAILY | \*How often are the WIC grocery items restocked? DAILY

**WIC Concept Histories Table:**

Concept Flag	Start Date	End Date
<input checked="" type="checkbox"/>	01/18/2014	01/15/2015

Figure: Vendor Sales General Add Page


*Fields:*

- **Vendor Name** – The name of the Vendor. This field is display only.
- **Please select the value which best describes your outlet** – This field is populated with the Peer Group selected during the initial Add, however, it can be modified. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. If an unknown value is entered, the message, “Value not found” will be displayed. This field is mandatory.
- **Actual/Estimated** – This selection option indicates if the annual food and gross sales are Actual or Estimated values. The default value is Estimated. This field is mandatory.
- **Gross \$** – The annual dollar value of all sales at this retail outlet. This is the total Food \$, Alcohol \$, Tobacco \$, Lottery \$, Fuelage \$, Other Sales \$, and General Merchandise \$. This field is display only.
- **Food \$** – The annual dollar value of food sales for this Vendor. This field accepts numeric values with an explicit 2-digit decimal point. This field is mandatory.
- **Alcohol \$** – The annual dollar value of alcohol sales for this Vendor. This field accepts numeric values with an explicit 2-digit decimal point. This field is mandatory.
- **Tobacco \$** – The annual dollar value of tobacco sales for this Vendor. This field accepts numeric values with an explicit 2-digit decimal point. This field is mandatory.
- **Lottery \$** – The annual dollar value of lottery sales for this Vendor. This field accepts numeric values with an explicit 2-digit decimal point. This field is mandatory.
- **Fuelage \$** – The annual dollar value of fuelage sales for this Vendor. This field accepts numeric values with an explicit 2-digit decimal point. This field is optional.
- **Other Sales \$** – The annual dollar value of other sales for this Vendor. This field accepts numeric values with an explicit 2-digit decimal point. This field is optional.
- **General Merchandise \$** – The annual dollar value of general merchandise for this Vendor. This field accepts numeric values with an explicit 2-digit decimal point. This field is optional.
- **Fiscal Year for Above Figures** – This value represents the fiscal year in which the annual sales were collected.
- **Cash \$** – Of the annual food sales (Food \$), the amount that was received in cash. This field accepts numeric values with an explicit 2-digit decimal point. This field is mandatory.
- **Credit \$** – Of the annual food sales (Food \$), the amount that was received as a credit payment. This field accepts numeric values with an explicit 2-digit decimal point. This field is optional.
- **SNAP \$** – Of the annual food sales (Food \$), the amount that was received as a SNAP payment. This field accepts numeric values with an explicit 2-digit decimal point. This field is mandatory.
- **WIC \$** – Of the annual food sales (Food \$), the amount that was received as a WIC payment. This field accepts numeric values with an explicit 2-digit decimal point. This field is mandatory.
- **Question: Will more than 50% of your annual revenue from the sale of food come from WIC food instruments?** – This selection option allows the user to answer Yes or No. The default value is No. This field is mandatory.


- **If yes, do you provide or plan to provide incentive items to the WIC program customers?** – If the previous question, “Will more than 50% of your annual revenue from the sale of food come from WIC food instruments?” was answered yes, this field becomes enabled. This selection option allows the user to answer Yes or No to the question of providing incentive items to WIC program customers. The default value is No. This field is only mandatory when enabled.
- **Question: Does the outlet’s checkout registers use optical scanning devices which record product and price information on the customer receipts?** – This selection option allows the user to answer Yes or No. The default value is No. This field is mandatory.
- **If yes, number of POS Terminals** – If the previous question, “Does the outlet’s checkout registers use optical scanning devices...?” was answered yes, this field becomes enabled and mandatory. This field accepts whole numbers only.
- **If yes, number of Optical Terminals** – If the previous question, “Does the outlet’s checkout registers use optical scanning devices...?” was answered yes, this field becomes enabled and mandatory. This field accepts whole numbers only.
- **If yes, can the system be programmed to detect WIC Authorized vs Non-Authorized products?** – If the previous question, “Does the outlet’s checkout registers use optical scanning devices...?” was answered yes, this field becomes enabled and mandatory. This selection option allows the user to indicate if the system is able to be programmed to detect WIC Authorized vs Non-Authorized products. The default value is No.
- **Question: How do you decide how much WIC stock to order?** – The user can select an answer such as Conduct an informal walk-through, Order a certain amount of each item, and Other. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. If an unknown value is entered, the message, “Value not found” will be displayed. This field is mandatory.  
**Explain Other** – If the previous question, “How do you decide how much WIC stock to order?” was answered with Other, this field becomes enabled and mandatory. The user enters an explanation for how they decide how much WIC stock to order. This field accepts up to 2000 alphanumeric and special characters.
- **Question: How often are the Dairy cases restocked?** – The user can select an answer such as Daily, Twice Weekly, and Weekly. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. If an unknown value is entered, the message, “Value not found” will be displayed. This field is mandatory.
- **Question: How often are the WIC grocery items restocked?** – The user can select an answer such as Daily, Twice Weekly, and Weekly. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. If an unknown value is entered, the message, “Value not found” will be displayed. This field is mandatory.
- **WIC Concept Histories Grid:**
  - **Concept Flag** – Check mark indicates that the Vendor is considered a WIC Concept store. This field is display only.

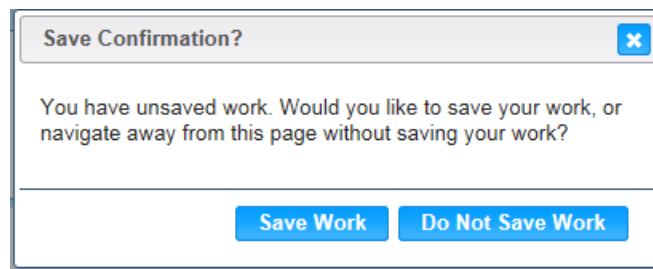
- **Start Date** – The date the WIC Concept store designation begins. Display only.
- **End Date** – The date the WIC Concept store designation ends. Display only.


*Buttons:*

- **Save** – Press this button to save the new Owner record.
- **Reset** – Press this button to undo any modifications made to the Owner record since the last Save was performed.
- **WIC Concept Histories:**
  -  **(Add)** – Press this button to bring up the WIC Concept Histories Modal.



-  **(Close Window)** – By clicking this button, the window is closed and no action is taken.
- **Concept Flag** – Check mark indicates that the Vendor is considered a WIC Concept store. This field is mandatory.
- **Start Date** – The date that the WIC Concept store designation begins. The Start date must be unique for the Vendor. This field is mandatory.
- **End Date** – The date that the WIC Concept store designation ends. This field is optional, however, the preceding entry must have an end date before adding a new entry.
- **OK** – Press this button after all fields are completed.
- **Cancel** – Press this button to close the Add WIC Concept Histories Modal and return to the Sales General without saving any Concept History fields entered.
- **Back To List** – Press this button to go back to the Vendor Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.



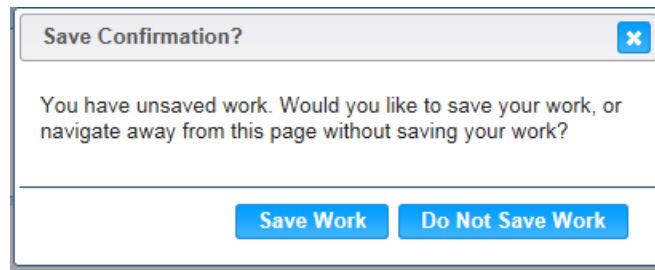
-  **(Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

*Calculation(s):*

- The Gross \$ is the total of Food \$, Alcohol \$, Tobacco \$, Lottery \$, Fuelage \$, Other Sales \$, and General Merchandise \$.


*Background Processes:*

- 1) The system performs a three step save process when saving a new Vendor Sales | General:
  - 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
- 3) If the user attempts to navigate off the Vendor Sales | General page without saving any modifications, the Save Confirmation notification appears.

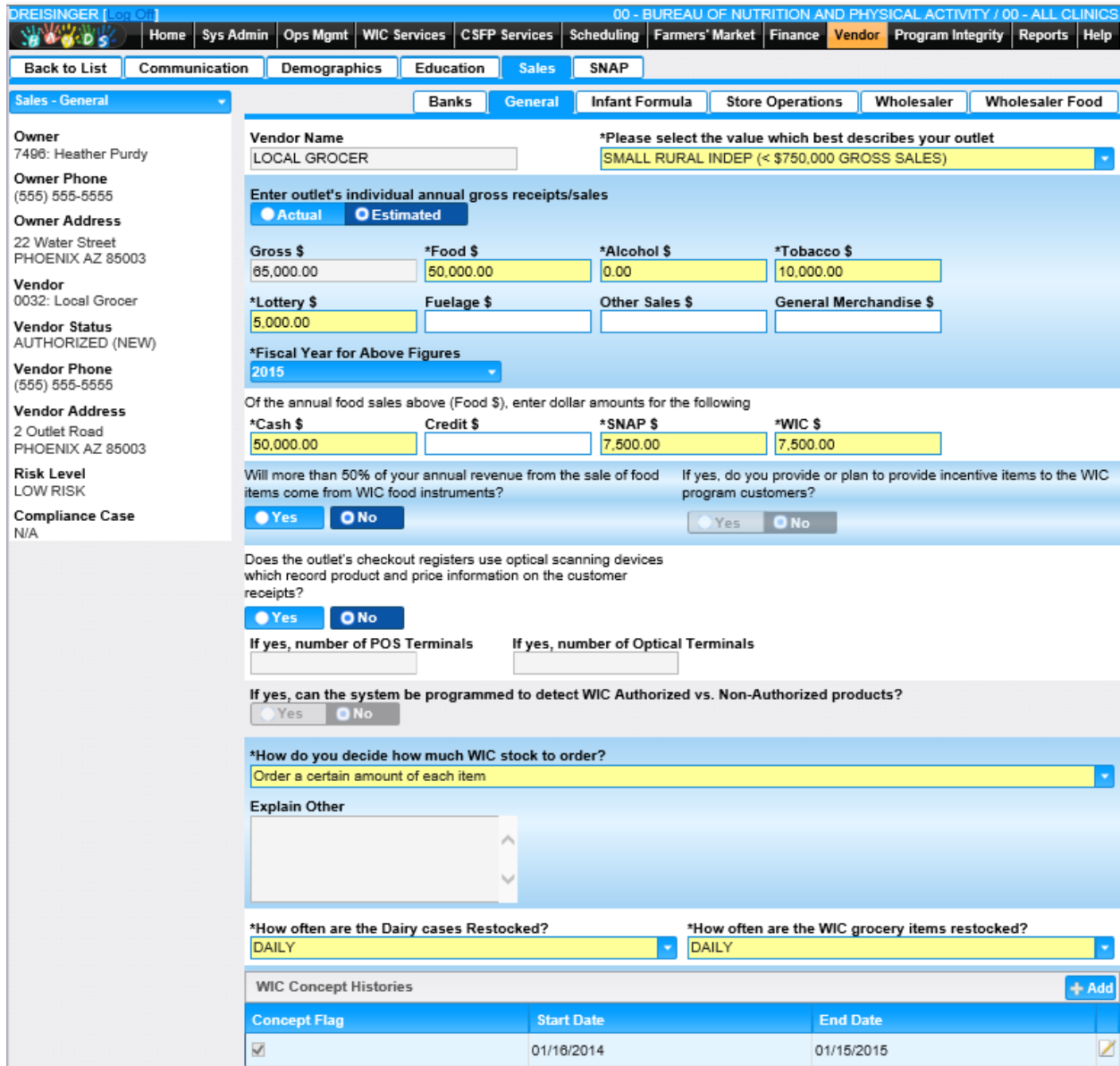


- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

## 2.4.2 Vendor Edit: Sales | General

Vendor Sales General information can be modified by pressing the  (**Edit Icon**) under the Vendor Lookup Result Grid. To the left of the screen, the Active Record denotes basic information regarding the Vendor. The Edit field definitions are the same as the Add page. See the Figure below for the Sales | General Add screen for Vendor.

*Navigation Path: Vendor Lookup Search Results | Edit Icon | Sales General Page*



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

**Sub-Menu:** Back to List | Communication | Demographics | Education | **Sales** | SNAP

**Sales - General** | Banks | **General** | Infant Formula | Store Operations | Wholesaler | Wholesaler Food

**Owner:** 7496: Heather Purdy  
**Owner Phone:** (555) 555-5555  
**Owner Address:** 22 Water Street, PHOENIX AZ 85003  
**Vendor:** 0032: Local Grocer  
**Vendor Status:** AUTHORIZED (NEW)  
**Vendor Phone:** (555) 555-5555  
**Vendor Address:** 2 Outlet Road, PHOENIX AZ 85003  
**Risk Level:** LOW RISK  
**Compliance Case:** N/A

**Vendor Name:** LOCAL GROCER  
**\*Please select the value which best describes your outlet:** SMALL RURAL INDEP (< \$750,000 GROSS SALES)

**Enter outlet's individual annual gross receipts/sales:**  
 Actual  Estimated

Gross \$	*Food \$	*Alcohol \$	*Tobacco \$
65,000.00	50,000.00	0.00	10,000.00
*Lottery \$	Fuelage \$	Other Sales \$	General Merchandise \$
5,000.00			

**\*Fiscal Year for Above Figures:** 2015

Of the annual food sales above (Food \$), enter dollar amounts for the following

*Cash \$	Credit \$	*SNAP \$	*WIC \$
50,000.00		7,500.00	7,500.00

Will more than 50% of your annual revenue from the sale of food items come from WIC food instruments?  Yes  No

If yes, do you provide or plan to provide incentive items to the WIC program customers?  Yes  No

Does the outlet's checkout registers use optical scanning devices which record product and price information on the customer receipts?  Yes  No

If yes, number of POS Terminals:   
 If yes, number of Optical Terminals:

If yes, can the system be programmed to detect WIC Authorized vs. Non-Authorized products?  Yes  No

**\*How do you decide how much WIC stock to order?**  
 Order a certain amount of each item

Explain Other:

**\*How often are the Dairy cases Restocked?** DAILY  
**\*How often are the WIC grocery items restocked?** DAILY

**WIC Concept Histories** + Add

Concept Flag	Start Date	End Date
<input checked="" type="checkbox"/>	01/16/2014	01/15/2015

*Figure: Vendor Sales General Edit Page*

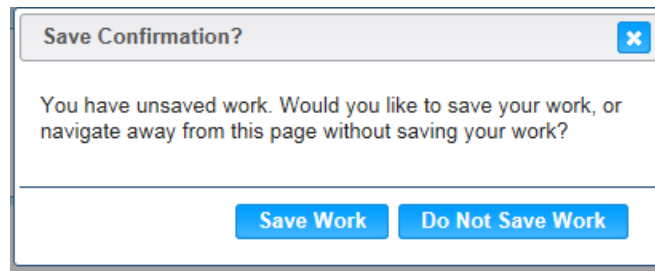
*Calculation(s):*

- The Gross \$ is the total of Food \$, Alcohol \$, Tobacco \$, Lottery \$, Fuelage \$, Other Sales \$, and General Merchandise \$.



*Background Processes:*

- 1) The amount entered and saved under (Food \$) SNAP \$ is populated under Food \$ on the SNAP page.
- 2) The system performs a three step save process when saving a new Vendor Sales | General:
  - 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.
- 3) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
- 4) If the user attempts to navigate off the Vendor Sales | General page without saving any modifications, the Save Confirmation notification appears.



- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

### 2.4.3 Vendor Add: Sales | Banks

The user can record Banks associated with the Vendor using this page. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Sales | Banks Add screen for Vendor.

*Navigation Path: Vendor Lookup | Add Button | Sales Banks Page*




The screenshot displays the 'Vendor Sales Bank Add Page' within a web application. The top navigation bar includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The 'Vendor' menu item is highlighted. Below this, a secondary navigation bar contains 'Back to List', 'Communication', 'Demographics', 'Education', 'Sales', and 'SNAP'. The 'Sales' tab is active, showing a sub-menu with 'Banks', 'General', 'Infant Formula', 'Store Operations', 'Wholesaler', and 'Wholesaler Food'. The 'Banks' sub-tab is selected, leading to the 'Owner Bank Information' section. This section contains several input fields: 'Bank Name' (NEW BANK), 'Routing Number' (9999999), 'Federal ID' (8888888), 'Deposit Bank' (radio buttons for Yes and No), and 'Account Number' (87643GO1). To the left of this section is a sidebar with 'Owner' information (7461: GENERIC OWNER 1), 'Owner Phone' (555) 555-2277, 'Owner Address' (100 MAIN STREET, EL MIRAGE AZ 85335), 'Vendor' information (0890: GENERAL GROCERY), 'Vendor Status' (AUTHORIZED (NEW)), 'Vendor Phone' (555) 555-3261 ext. 123, 'Vendor Address' (110 MAIN STREET, IMMANUEL MISSION AZ 86514), 'Risk Level' (MEDIUM TO HIGH RISK), and 'Compliance Case' (N/A). Below the 'Owner Bank Information' is a 'Vendor Banks' table with columns: Bank Name, Routing Number, Bank Account Number, Effective Date, and Deposit Bank. A single row is shown: EASY BANK, 123456, 6546334AZ, 11/01/2014, Yes. There is an '+ Add' button to the right of the table header. At the bottom right of the page are 'Save' and 'Reset' buttons.

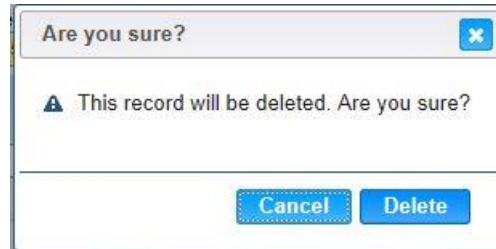
*Figure: Vendor Sales Bank Add Page*

*Fields:*


- **Owner Bank Information:**
  - **Bank Name** – This field is populated with the Owner Bank Information. The name of the financial institution used by the Owner. This field is display only.
  - **Routing Number** – This field is populated with the Owner Bank Information. The Routing Number used by the Federal Reserve System to identify the financial institution. The Routing Number is automatically populated when a Bank Name is present. This field is display only.
  - **Federal ID** – This field is populated with the Owner Bank Information. The Federal Identification of the financial institution. This field is display only.
  - **Deposit** – This field is populated with the Owner Bank Information. This selection option is used to indicate to the system that this information needs to be included in

the Vendor Bank file sent to FSMC during the End of Day (EOD) processing for ACH processing. This field is display only.

- **Account Number** – This field is populated with the Owner Bank Information. The account number for the financial institution indicated. This field is display only.
- **Vendor Banks Grid:**
  - **Bank Name** – The name of the financial institution used by the Vendor. This field is display only.
  - **Routing Number** – The Routing Number used by the Federal Reserve System to identify the financial institution. This field is display only.
  - **Bank Account Number** – The account number for the financial institution indicated. This field is display only.
  - **Effective Date** – The date the account went into effect. This field is display only.
  - **Deposit Bank** – This field indicates that the configured bank will be used for Deposits. This field is display only.
  -  **(Edit Icon)** – Once a record has been added, the Edit Icon will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
  -  **(Delete Icon)** – Once a record has been added, the Delete Icon will be enabled. When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Bank will remain in the Vendor Bank Grid. If Delete button is selected, the record will be removed. By clicking the  **(Close Window)**, the window is closed and no action is taken.  
*Note:* The record will not be permanently removed until a Save is performed.



*Buttons:*

- **Save** – Press this button to save the new Bank record. The save will be cancelled, if no deposit bank is specified.
- **Reset** – Press this button to undo any modifications made to the Bank record since the last Save was performed.
- **Vendor Banks:**
  -  **Add** **(Add)** – Press this button to bring up the Vendor Banks Modal.

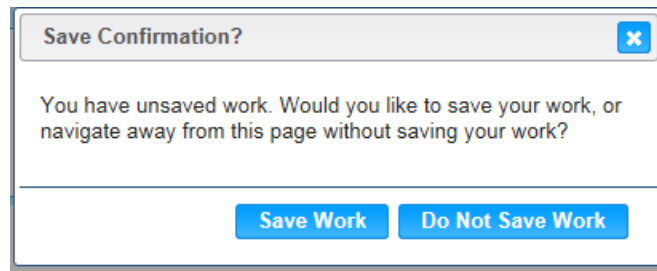
- **X (Close Window)** – By clicking this button, the window is closed and no action is taken.
- **Bank** – The name of the financial institution used by the Vendor. This field can be manually entered, or chosen from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. If an unknown value is entered, the message, “Value not found” will be displayed. This field is optional.
- **Bank Account Number** – The account number for the financial institution indicated. The Bank Account must be an alphanumeric value with a maximum length of 17. This field is mandatory.
- **Effective Date** – The valid first date to use this bank account. The Effective Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Effective Date. The user may also select the Effective Date using the provided Calendar which appears when the field is entered. This field is mandatory.
- **Deposit** – This selection option is used to designate the deposit bank used by the Vendor. There is no default value for this field. This field is mandatory. At least one Bank must be specified as the deposit bank before a Save can be performed.
- **OK** – Press this button after all fields are completed.
- **Cancel** – Press this button to close the Add Banks Modal and return to the Sales General without saving any Bank fields entered.
- **Back To List** – Press this button to go back to the Vendor Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.

- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

*Calculation(s):* None


*Background Processes:*

- 1) The system performs a three step save process when saving a new Vendor Sales | Banks:
  - 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
- 3) If the user attempts to navigate off the Vendor Sales | Banks page without saving any modifications, the Save Confirmation notification appears.

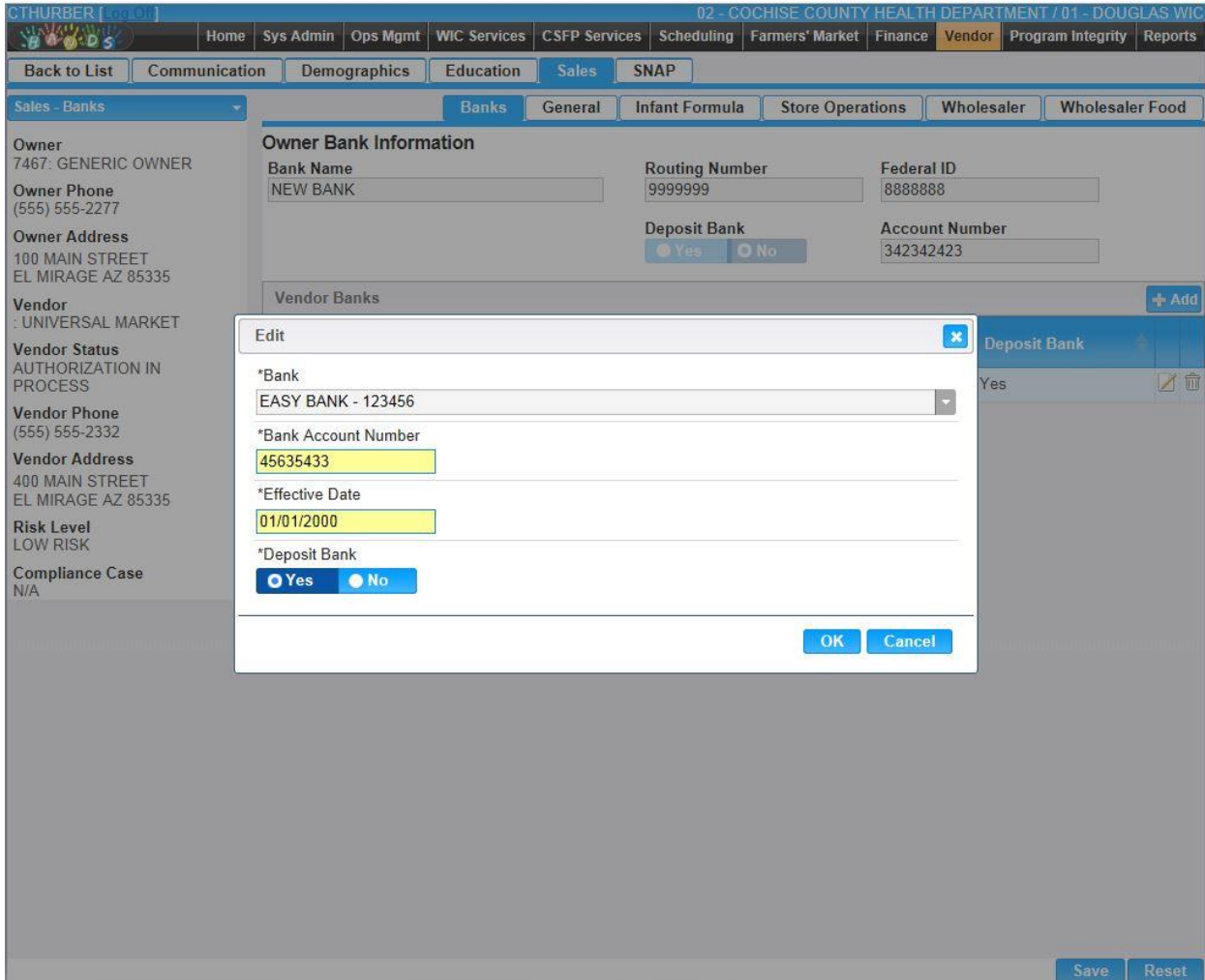


- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

## 2.4.4 Vendor Edit: Sales | Banks

The user can edit an existing Bank on this page by pressing the  (**Edit Icon**) found at the right of the Vendor Banks Grid. This brings up the Sales Bank Edit Modal. See the Figure below for the Sales | Banks Edit screen for Vendor.

*Navigation Path: Vendor Lookup Search Results | Edit Icon | Sales Banks Page | Edit Icon*



The screenshot displays the 'Vendor Sales Bank Edit Modal' overlaid on the 'Sales - Banks' page. The modal contains the following fields:

- \*Bank:** A dropdown menu showing 'EASY BANK - 123456'.
- \*Bank Account Number:** A text input field containing '45635433'.
- \*Effective Date:** A text input field containing '01/01/2000'.
- \*Deposit Bank:** Radio buttons for 'Yes' (selected) and 'No'.

The background page shows 'Owner Bank Information' with fields for Bank Name (NEW BANK), Routing Number (9999999), Federal ID (8888888), Deposit Bank (Yes/No), and Account Number (342342423). A 'Vendor Banks' table is also visible with an 'Add' button.

*Figure: Vendor Sales Bank Edit Modal*

### Fields:

- **Bank Name** – This field is populated with the existing Bank Name. This field is display only.
- **Bank Account Number** – The account number for the financial institution indicated. The Bank Account must be an alphanumeric value with a maximum length of 17. This field is mandatory.
- **Effective Date** – The valid first date to use this bank account. The Effective Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Effective Date. The user may also select the

Effective Date using the provided Calendar which appears when the field is entered. This field is mandatory.

- **Deposit** – This selection option is used to designate the deposit bank used by the Vendor. There is no default value for this field. This field is mandatory. At least one Bank must be specified as the deposit bank before a Save can be performed.

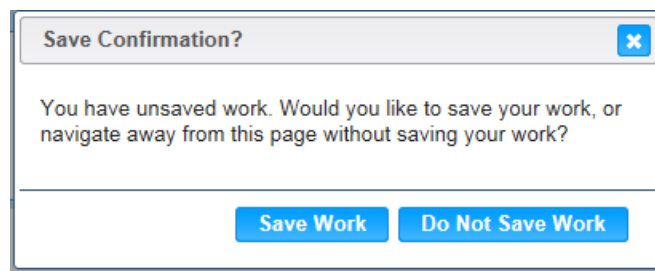
*Buttons:*

- **OK** – Press this button after all fields are completed.
- **Cancel** – Press this button to close the Edit Bank Modal and return to the Sales Banks without saving any Bank fields entered.

*Calculation(s):* None

*Background Processes:*

- 1) The system performs a three step save process when saving a new Vendor Sales | Banks:
  - 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
- 3) If the user attempts to navigate off the Vendor Sales | Banks page without saving any modifications, the Save Confirmation notification appears.



- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and navigation continues.
- **Do Not Save Work** – The modifications are cleared and navigation continues.

## 2.4.5 Vendor Add | Infant Formula

The user can configure which Infant Wholesaler(s) are utilized by the Vendor. This is done by checking the box next to each relevant Infant Wholesalers. After the selections have been made, the user presses the Add to Vendor button. This moves the selected Infant Wholesalers from the Available Infant Wholesalers Grid to the Vendor Infant Wholesalers Grid. If the Infant Wholesaler is no longer associated with the Vendor, the Infant Wholesaler can be moved back to the Available Infant Wholesalers Grid by again checking the box next to the name in the Vendor Infant Wholesaler Grid and clicking the Remove from Vendor button. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Sales | Infant Wholesalers Add screen for Vendor.

*Navigation Path: Vendor Lookup | Add Button | Sales Infant Formula Page*



The screenshot displays the 'Sales - Infant Formula' page. The top navigation bar includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The 'Vendor' tab is selected. Below the navigation bar, there are tabs for 'Back to List', 'Communication', 'Demographics', 'Education', 'Sales', and 'SNAP'. The 'Sales' tab is active, and within it, there are sub-tabs for 'Banks', 'General', 'Infant Formula', 'Store Operations', 'Wholesaler', and 'Wholesaler Food'. The 'Infant Formula' sub-tab is selected. On the left side, there is a sidebar with the following information: Owner (7461: GENERIC OWNER 1), Owner Phone (555) 555-2277, Owner Address (100 MAIN STREET, EL MIRAGE AZ 85335), Vendor (0890: GENERAL GROCERY), Vendor Status (AUTHORIZED (NEW)), Vendor Phone (555) 555-3261 ext. 123, Vendor Address (110 MAIN STREET, IMMANUEL MISSION AZ 86514), Risk Level (MEDIUM TO HIGH RISK), and Compliance Case (N/A). The main content area is divided into two sections: 'Available Infant Wholesalers' and 'Vendor Infant Wholesalers'. The 'Available Infant Wholesalers' section contains a list of 12 wholesalers with checkboxes next to their names. The 'Vendor Infant Wholesalers' section contains a list of 3 wholesalers with checkboxes next to their names. At the bottom of the 'Available Infant Wholesalers' section, there are 'Add To Vendor' and 'Remove From Vendor' buttons. At the bottom of the 'Vendor Infant Wholesalers' section, there are 'Save' and 'Reset' buttons.

*Figure: Vendor Sales Infant Formula Add Page*

*Fields:*

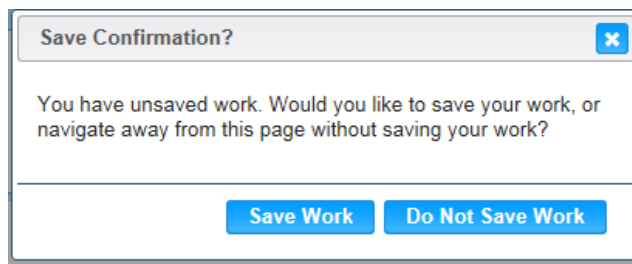
- **Available Infant Wholesalers Grid:**
  - **Name** – The list of available Infant Wholesalers that can be added to the Vendor. The check box next to the Infant Wholesalers name is marked to add the Infant Wholesaler to the Vendor.




-  **(Edit Icon)** – Once a record has been added, the Edit Icon will be enabled to allow review of the wholesaler details. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
- **Vendor Infant Wholesalers Grid:**
  - **Name** – The list of currently assigned Infant Wholesalers that have been added to the Vendor. The check box next to the Infant Wholesalers name is marked to remove the Infant Wholesaler from the Vendor.
  -  **(Edit Icon)** – Once a record has been added, the Edit Icon will be enabled to allow review of the wholesaler details. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.

*Buttons:*

- **Add To Vendor** – Press this button to move the Infant Wholesaler from the list within the Available Infant Wholesalers Grid to the Vendor Infant Wholesaler Grid.
- **Remove From Vendor** – Press this button to move the Infant Wholesaler from the list within the Vendor Infant Wholesaler back to the Available Infant Wholesaler Grid.
- **Save** – Press this button to save the selected Infant Wholesaler record(s).
- **Reset** – Press this button to undo any modifications made to the Infant Wholesaler record changes since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.




-  **(Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

*Calculations:* None

*Background Process(es):*

- 1) Only Wholesalers who have been identified as Wholesalers of Infant Formula will be listed under the Available Infant Wholesalers Grid.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

## 2.4.6 Vendor Edit | Infant Formula

The user can edit any of the Infant Wholesalers on this page by pressing the  (**Edit Icon**) found next to the Name within both the Available Infant Wholesalers Grid and the Vendor Infant Wholesaler Grid. This brings up the Sales Infant Formula Edit page. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Sales | Infant Wholesaler Edit screen for Vendor.

*Navigation Path: Vendor Lookup Search Results | Edit Icon | Sales Infant Formula Edit Icon*

CTHURBER [Logout] 02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH

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

Back to List

**Owner**  
7461: GENERIC OWNER 1

**Owner Phone**  
(555) 555-2277

**Owner Address**  
100 MAIN STREET  
EL MIRAGE AZ 85335

**Vendor**  
0890: GENERAL GROCERY

**Vendor Status**  
AUTHORIZED (NEW)

**Vendor Phone**  
(555) 555-3261 ext. 123

**Vendor Address**  
110 MAIN STREET  
IMMANUEL MISSION AZ 86514

**Risk Level**  
MEDIUM TO HIGH RISK

**Compliance Case**  
N/A

**Street Address**

**Address1**  
4550 MARKET STREET

**Address2**

**City, State, ZIP Code, and County**  
TOLLESON, AZ 85353 MARICOPA

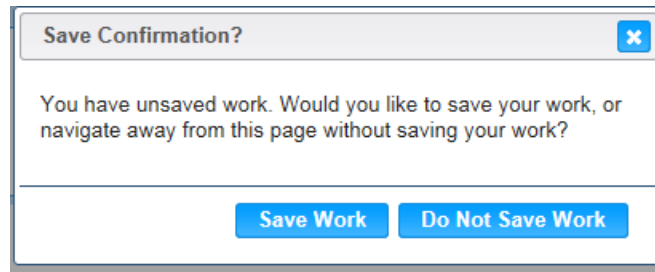
*Figure: Vendor Sales Infant Formula Edit Page*

### Fields:

- **Street Address:**
  - **Street Address 1** – The first of two Street Address fields available for the Infant Wholesaler’s street address. This field is display only.
  - **Street Address 2** – The second of two Street Address fields available for the Infant Wholesaler’s street address. This field is display only.
  - **Street City, State, ZIP Code, and County** – The Street City, State, ZIP Code, and County portion of the Infant Wholesaler’s Address. This field is display only.

### Buttons:

- **Back To List** – Press this button to go back to the Infant Wholesaler page with previous results. If there is unsaved work the Save Confirmation notification appears.



- **Close Window** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Infant Wholesaler page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Infant Wholesaler main page.

*Calculations:* None

*Background Process(es):* None

### 2.4.7 Vendor Add | Store Operations

The Store Operations page is used to enter Hours of Operations and other operational information. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Sales | Store Operations Add screen for Vendor.

Navigation Path: Vendor Lookup | Add Button | Sales Store Operations Page

The screenshot displays the 'Vendor Sales Store Operations Add Page' within a web application. The interface features a top navigation bar with various system modules and a secondary set of tabs for 'Sales' and 'SNAP'. The main content area is organized into several sections:

- Owner Information:** Includes fields for Owner Name (7496: Heather Purdy), Owner Phone ((555) 555-5555), and Owner Address (22 Water Street, PHOENIX, AZ 85003).
- Vendor Information:** Includes Vendor Name (0032: Local Grocer), Vendor Status (AUTHORIZED (NEW)), Vendor Phone ((555) 555-5555), Vendor Address (2 Outlet Road, PHOENIX, AZ 85003), Risk Level (LOW RISK), and Compliance Case (N/A).
- Store Operations Details:**
  - Opening Date:** 09/14/2014, with a 'Pre-fill 24/7' checkbox.
  - Hours of Operation Table:**

Day of Week	Open	Closed	Open/Closed
Sunday	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Closed <input type="radio"/> Open
Monday	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Closed <input type="radio"/> Open
Tuesday	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Closed <input type="radio"/> Open
Wednesday	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Closed <input type="radio"/> Open
Thursday	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Closed <input type="radio"/> Open
Friday	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Closed <input type="radio"/> Open
Saturday	<input type="text"/>	<input type="text"/>	<input checked="" type="radio"/> Closed <input type="radio"/> Open
  - Additional Fields:**
    - \*Outlet's Retail Square Footage: 4000
    - \*Outlet's Storage Square Footage: 2000
    - \*Number of Full-Time Cashiers: 4
    - \*Number of Part-Time Cashiers: 3
    - \*Number of Checkout lanes:
    - Does the outlet comply with the applicable provision of the Americans with Disabilities ACT (ADA) of 1990?  Yes  No
    - Has the store ever been cited by the state or county health inspector for a violation?  Yes  No
    - If yes, Explain:
    - If yes, was the license revoked?  Yes  No
    - If yes, license/permit start date:
    - If yes, license/permit end date:

Figure: Vendor Sales Store Operations Add Page

Fields:

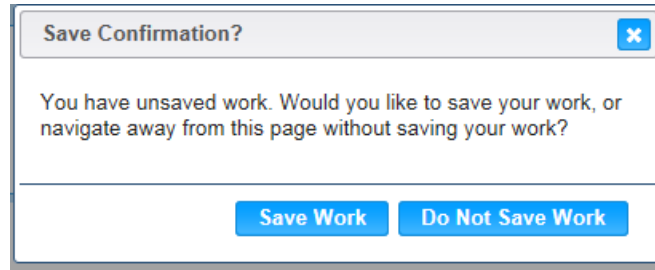
- **Opening Date** – The date on which the store opened for the public. Display only.
- **Pre-fill 24/7** – This check box allows the user to automatically fill in the Hours of Operation if the Vendor is open 24 hours a day every day of the week. The Hours of Operation are populated with an Open and Close time of 12:00 am and the Open selection option is selected for every day of the week.
- **Hours of Operation (Sunday – Saturday):**

- **Open** – The time the Vendor opens for business. This field becomes enabled and mandatory when the Open/Closed selection option is marked as Open. The user can select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. Or the user can manually enter the Open time in the format HH:MM[am/pm].
- **Closed** – The time when the Vendor closes for business. This field becomes enabled and mandatory when the Open/Closed selection option is marked as Open. The user can select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. Or the user can manually enter the Open time in the format HH:MM[am/pm].
- **Open/Closed** – The user can configure days of operation for the Vendor by selecting Closed or Open for each day of the week. This field is mandatory.
- **Outlet’s Retail Square Footage** – The number of square feet of floor space utilized to display retail merchandise. This field must be a numeric value greater than 0. This field is mandatory.
- **Outlet’s Storage Square Footage** – The number of square feet of floor space designated to store merchandise not currently available for sale. This field must be a numeric value greater than zero. This field is mandatory.
- **Number of Full-Time Cashiers** – The number of full-time cashiers employed. This field must be numeric and greater than or equal to zero. This field is mandatory.
- **Number of Part-Time Cashiers** – The number of part-time cashiers employed. This field must be numeric and greater than or equal to zero. This field is mandatory.
- **Number of Checkout Lanes** – The number of Checkout Lanes at the Vendor site. This field must be numeric value greater than zero. This field is mandatory.
- **Question: Does the outlet comply with the applicable provision of the Americans with Disabilities ACT (ADA) of 1990?** – The user can select Yes or No for the answer. The default response is No. This field is mandatory.
- **Question: Has the store ever been cited by the state or county health inspector for a violation?** – The user can select Yes or No. The default is No. This field is mandatory.
- **If yes, Explain** – If the previous question, “Has the store ever been cited by the state or county health inspector for a violation?” was answered yes, this field becomes enabled and mandatory. This field accepts up to 2000 alphanumeric and special characters.
- **Question: If yes, was the license revoked?** – This field is enabled and mandatory if the user answered Yes to the question “Has the store ever been cited by the state or county health inspector for a violation?” The user can select Yes or No. The default is No.
- **If yes, license/permit start date** – If the question, “Has the store ever been cited by the state or county health inspector for a violation?” was answered yes, and the previous question “If yes, was the license revoked” was answered yes, this field becomes enabled and mandatory. The License/Permit Start Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the License/Permit Start Date. The user may also select the License/Permit Start Date using the provided Calendar which appears when the field is entered.
- **If yes, license/permit start date** – If the question, “Has the store ever been cited by the state or county health inspector for a violation?” was answered yes, and the previous question “If yes, was the license revoked” was answered yes, this field becomes enabled and mandatory. The License/Permit End Date is entered in format MM/DD/YYYY. The

user does not need to enter the forward slash (/) character when manually entering the License/Permit End Date. The user may also select the License/Permit End Date using the provided Calendar which appears when the field is entered.

*Buttons:*

- **Save** – Press this button to save any modifications made to the Store Operations record.
- **Reset** – Press this button to undo any modifications made to the Store Operations record since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.



- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

*Calculations:* None

*Background Process(es):*

- 1) When the “Pre-fill 24/7” check box is selected, the hours of operation are set to Sunday through Saturday, 12:00 AM through 12:00 AM.
- 2) The End of Day (EOD) process will synchronize any sales data that has been entered into the Vendor Web system with HANDS.
- 3) The system performs a three step save process when saving a new Owner:
  - 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.
- 4) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

### 2.4.8 Vendor Edit | Store Operations

The Store Operations page can be modified. To the left of the screen, the Active Record denotes basic information regarding the Vendor. The Edit field definitions are the same as the Add page. See the Figure below for the Sales | Store Operations Add screen for Vendor.

Navigation Path: Vendor Lookup Search Results | Edit Icon | Sales Store Operations Page

Figure: Vendor Sales Store Operations Edit Page

Calculations: None

Background Process(es):

- 1) When the “Pre-fill 24/7” check box is selected, the hours of operation are set to Sunday through Saturday, 12:00 AM through 12:00 AM.
- 2) The End of Day (EOD) process will synchronize any sales data that has been entered into the Vendor Web system with HANDS.
- 3) The system performs a three step save process when saving a new Owner:
  - 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.
- 4) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.



## 2.4.9 Vendor Add | Wholesaler

The user can select which wholesaler(s) are connected with their Vendor. This is done by marking the check boxes next to each relevant wholesaler. After the selections have been made, the user presses the Add to Vendor button. This moves the selected wholesalers from the Available Wholesalers Grid to the Vendor Wholesalers Grid. If the wholesaler is no longer associated with the Vendor, the wholesaler can be moved back to the Available Wholesalers Grid by again marking the check box next to the name within the Vendor Wholesaler Grid and clicking the Remove from Vendor button. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Sales | Wholesalers Add screen for Vendor.



*Navigation Path: Vendor Lookup | Add Button | Sales Wholesaler Page*

The screenshot displays the 'Sales - Wholesaler' page. The top navigation bar includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The 'Vendor' tab is active. Below the navigation, there are tabs for 'Banks', 'General', 'Infant Formula', 'Store Operations', 'Wholesaler', and 'Wholesaler Food'. The 'Wholesaler' tab is selected. The page is divided into two main sections: 'Available Wholesalers' and 'Vendor Wholesalers'. The 'Available Wholesalers' section contains a list of 14 wholesalers with checkboxes next to their names. The 'Vendor Wholesalers' section contains a list of 3 wholesalers with checkboxes next to their names. There are buttons for 'Add To Vendor' and 'Remove From Vendor' between the two sections. On the left side, there is a sidebar with fields for 'Owner', 'Owner Phone', 'Owner Address', 'Vendor', 'Vendor Status', 'Vendor Phone', 'Vendor Address', 'Risk Level', and 'Compliance Case'. At the bottom right, there are 'Save' and 'Reset' buttons.

*Figure: Vendor Sales Wholesaler Add Page*

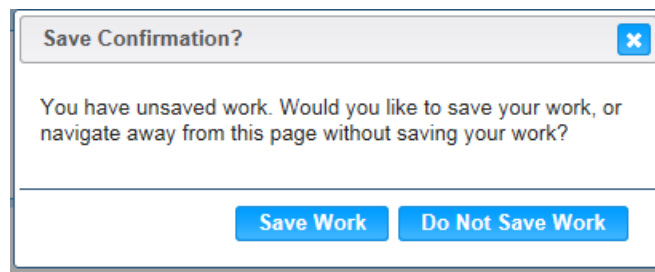
### Fields:


- **Available Wholesalers Grid:**
  - **Name** – The list of available wholesalers that can be added to the Vendor. The check box next to the wholesalers name is marked to add the wholesaler to the Vendor.

-  **(Edit Icon)** – Once a record has been added, the Edit Icon will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
- **Vendor Wholesalers Grid:**
  - **Name** – The list of currently assigned wholesalers that have been added to the Vendor. The check box next to the wholesalers name is marked to remove the wholesaler from the Vendor.
  -  **(Edit Icon)** – Once a record has been added, the Edit Icon will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.

*Buttons:*

- **Add To Vendor** – Press this button to move the wholesaler from the list within the Available Wholesalers Grid to the Vendor Wholesaler Grid.
- **Remove From Vendor** – Press this button to move the wholesaler from the list within the Vendor Wholesaler back to the Available Wholesaler Grid.
- **Save** – Press this button to save the selected Wholesaler record(s).
- **Reset** – Press this button to undo any modifications made to the Wholesaler record changes since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.




-  **(Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

*Calculations:* None

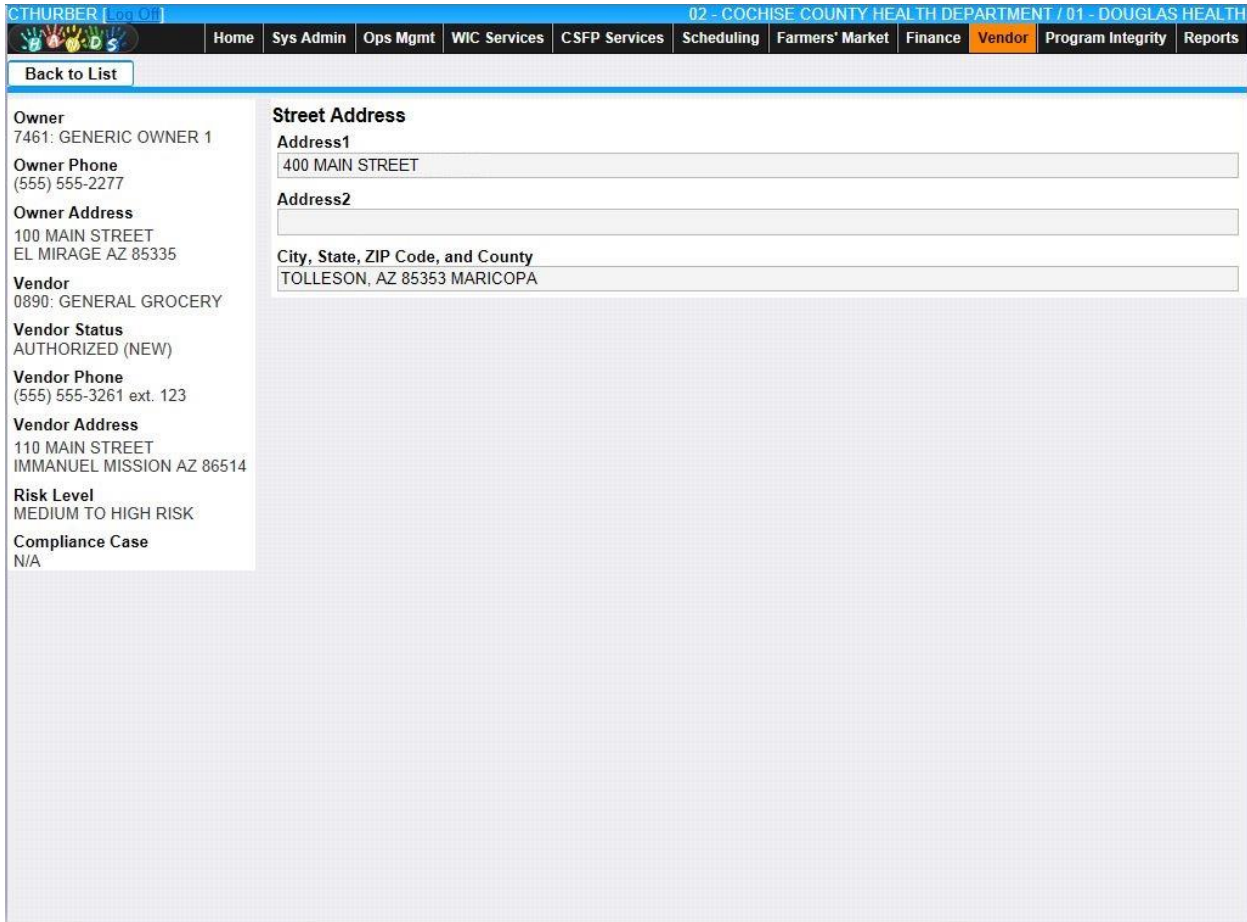
*Background Process(es):*

- 1) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

## 2.4.10 Vendor Edit | Wholesaler

The user can edit a Wholesaler by pressing the  (**Edit Icon**) found next to the Name within the Available Wholesalers Grid or the Vendor Wholesaler Grid. This brings up the Sales Wholesaler Edit page. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Sales | Wholesaler Edit screen for Vendor.

*Navigation Path: Vendor Lookup Search Results | Edit Icon | Sales Wholesaler Page | Edit Icon*



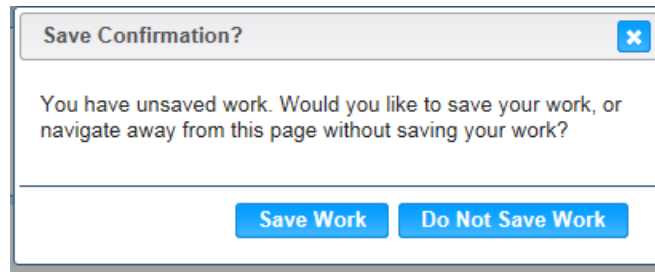
*Figure: Vendor Sales Wholesaler Edit Page*

### Fields:

- **Street Address:**
  - **Street Address 1** – The first of two Street Address fields available for the Wholesaler’s street address. This field is display only.
  - **Street Address 2** – The second of two Street Address fields available for the Wholesaler’s street address. This field is display only.
  - **Street City, State, ZIP Code, and County** – The Street City, State, ZIP Code, and County portion of the Wholesaler’s Address. This field is display only.

### Buttons:

- **Back To List** – Press this button to go back to the Wholesaler page with previous results. If there is unsaved work the Save Confirmation notification appears.




- **Close Window** (represented by a blue square with a white 'x') – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Wholesaler page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Wholesaler main page.

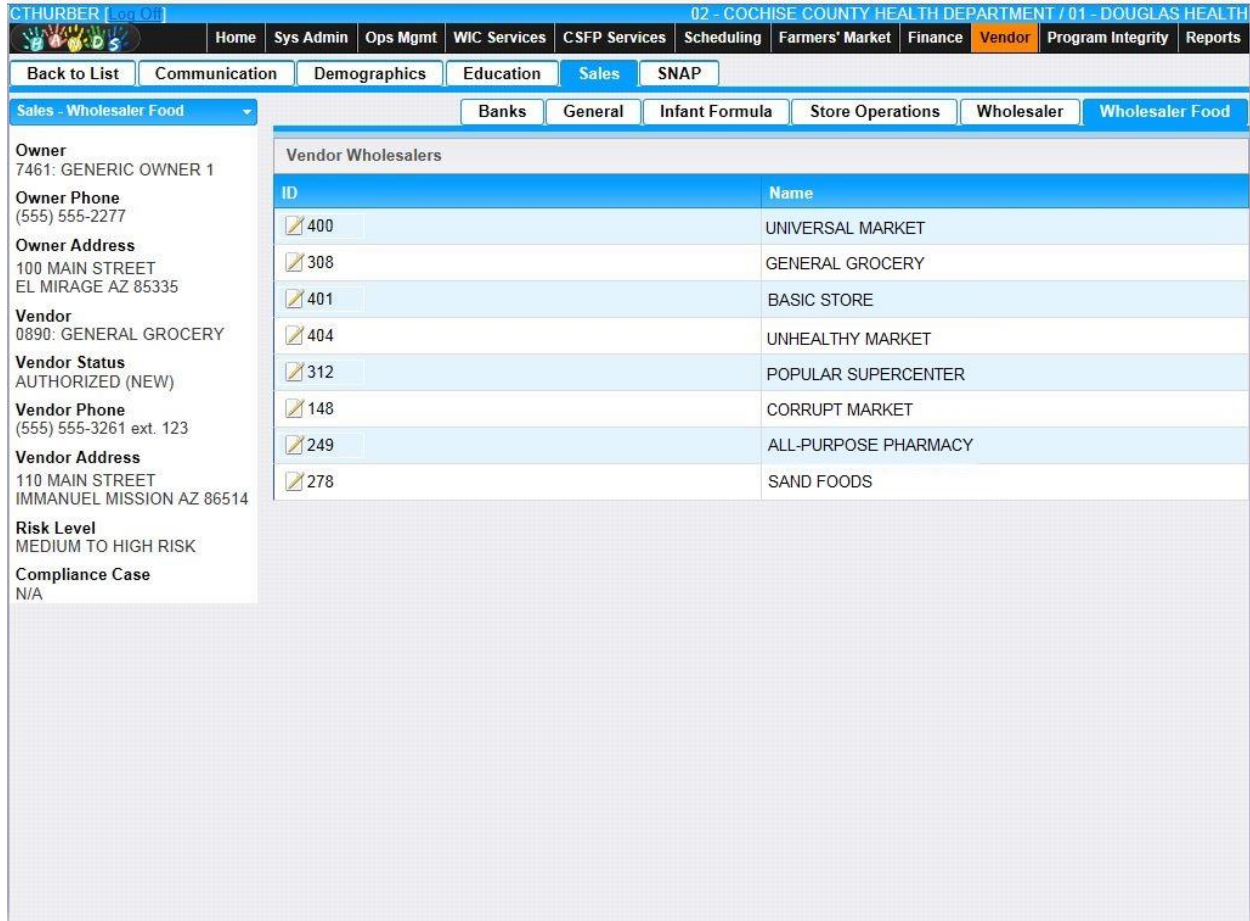
*Calculations:* None









*Background Process(es):* None

## 2.4.11 Vendor Add | Wholesaler Food

The user can associate Food Groups of the Wholesalers on this page by pressing the  (**Edit Icon**) next to the Food within Vendor Wholesalers Grid. This brings up the Sales Wholesaler Food Edit page. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Sales | Wholesaler Edit screen for Vendor.


*Navigation Path: Vendor Lookup | Add Button | Sales Wholesaler Food Page*



ID	Name
 400	UNIVERSAL MARKET
 308	GENERAL GROCERY
 401	BASIC STORE
 404	UNHEALTHY MARKET
 312	POPULAR SUPERCENTER
 148	CORRUPT MARKET
 249	ALL-PURPOSE PHARMACY
 278	SAND FOODS

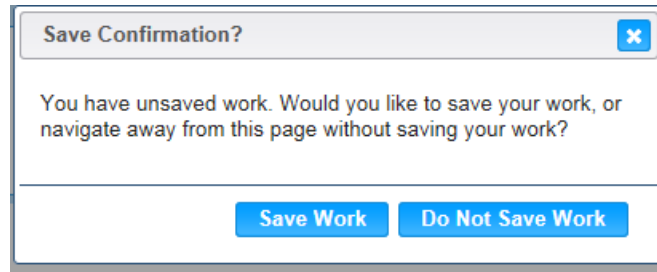
*Figure : Vendor Sales Wholesaler Food Add Page*


*Fields:*

- **Vendor Wholesalers Grid:**
  -  (**Edit Icon**) – When selected, navigation will switch to the Vendor Wholesale Foods Edit Screen pre-populated with the details of the record for editing.
  - **ID** – The system generated ID assigned to the Wholesaler. Display only.
  - **Name** – The name of the Wholesaler. This field is display only.

*Buttons:*

- **Back To List** – Press this button to go back to the Vendor Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.



-  (**Close Window**) – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

*Calculations:* None

*Background Process(es):* None

## 2.4.12 Vendor Edit | Wholesaler Food

The user can configure which Wholesaler(s) Foods are connected with their Wholesaler(s). This is done by marking the check boxes next to any relevant Available Wholesaler Foods. After the selections have been made, the user presses the Add to Wholesaler button. This moves the selected Food from the Available Wholesaler Food Grid to the Wholesalers Food Grid. If the Food is no longer associated with the Wholesaler, the Food can be moved back to the Available Wholesaler Foods Grid by again marking the check box next to the name within the Wholesalers Food Grid and clicking the Remove from Wholesaler button. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Sales | Wholesalers Food Add screen for Vendor.

Navigation Path: *Vendor Lookup Search Results | Edit Icon | Sales Wholesaler Page | Edit Icon*

Figure: Vendor Sales Wholesaler Food Edit Page

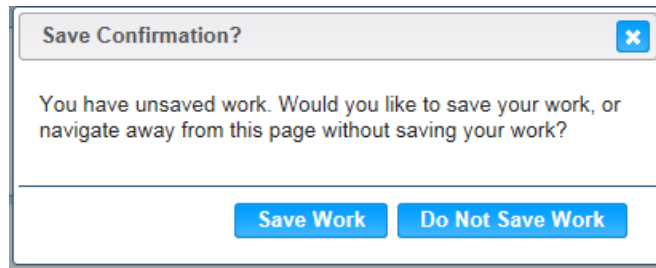
### Fields:


- **Available Wholesalers Foods:**
  - **Food** – The list of available Foods that can be added to the Wholesaler. The check box next to the Food name is marked to add the Food to the Wholesaler.
- **Wholesalers Food Grid:**

- **Name** – The list of currently assigned Foods that have been added to the Wholesaler. The check box next to the Food name is marked to remove the Food from the Wholesaler.

*Buttons:*

- **Add To Wholesaler** – Press this button to move the Food from the list within the Available Wholesaler Foods Grid to the Wholesalers Food Grid.
- **Remove From Vendor** – Press this button to move the Food from the list within the Wholesalers Food Grid back to the Available Wholesalers Food Grid.
- **Save** – Press this button to save the selected Food record(s).
- **Reset** – Press this button to undo any modifications made to the Food record changes since the last Save was performed.
- **Back To List** – Press this button to go back to the Wholesaler Food page with previous results. If there is unsaved work the Save Confirmation notification appears.



-  **(Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Wholesaler Food page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Wholesaler Food page.

*Calculations:* None

*Background Process(es):*

- 1) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.



## 2.5 Vendor SNAP

The purpose of this page is to provide the user with the capability to maintain Vendor SNAP information. This information includes data concerning general SNAP information such as Regional Office Code and Gross, Food, and Average Monthly Sales.

### 2.5.1 Vendor Add | SNAP

The user can add configure SNAP information. To the left of the screen, the Active Record denotes basic information regarding the Vendor. See the Figure below for the Sales | SNAP Add screen for Vendor.

*Navigation Path: Vendor Lookup | Add Button | SNAP page*

*Figure: Vendor SNAP Add Page*

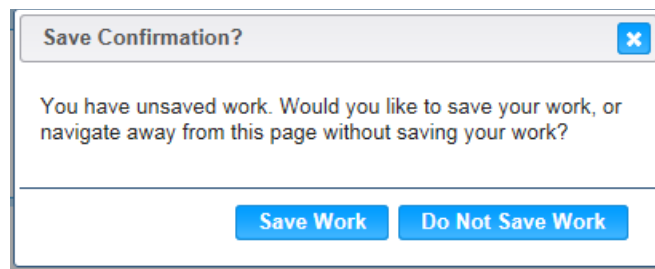
#### Fields:

- **Status** – The current authorization status of the Vendor such as Authorized (New), Authorization in Process, or Not Approved (Denied). This field is display only.
- **Authorization ID** – The seven-digit SNAP ID number. This field is mandatory unless the Vendor is a Pharmacy.
- **Authorization Date** – The date the outlet was authorized to redeem food stamps by the SNAP. This field is mandatory unless the Vendor is a Pharmacy.

- **Regional Office Code** – The SNAP regional office that handles the Vendor. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is mandatory unless the Vendor is a Pharmacy.
- **Gross Sales** – The gross sales at this outlet. This value can be estimated or actual. This field accepts numeric values with an explicit 2-digit decimal point. This field is mandatory unless the Vendor is a Pharmacy.
- **Food Sales** – The annual value of food sales at this outlet. This value can be estimated or actual. This field accepts numeric values with an explicit 2-digit decimal point. This field is mandatory unless the Vendor is a Pharmacy.
- **Average Monthly Sales** – The average monthly value of food stamps redeemed at this outlet. This value can be estimated or actual. This field accepts numeric values with an explicit 2-digit decimal point. This field is mandatory unless the Vendor is a Pharmacy.
- **High Risk** – A check box that indicates the Vendor/Applicant is a high risk for SNAP. This field is optional.
- **SNAP Investigation** – A check box that indicates a SNAP inspection has been performed. This field is optional.
- **SNAP Disqualified** – A check box that indicates the Vendor has been disqualified from the SNAP program.

*Buttons:*

- **Save** – Press this button to save any modifications made to the SNAP record.
- **Reset** – Press this button to undo any modifications made to the SNAP record since the last Save was performed.
- **Back To List** – Press this button to go back to the Vendor Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.



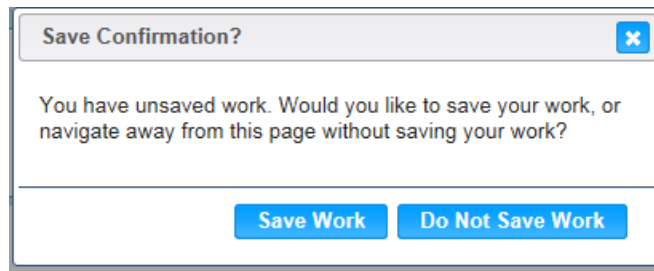
- **✕ (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.


*Calculations:* None

*Background Process(es):*

- 1) The system performs a three step save process when saving a new Vendor SNAP

- 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
  - 3) If the user attempts to navigate off the Vendor SNAP page without saving any modifications, the Save Confirmation notification appears.



-  (Close Window) – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

## 2.5.2 Vendor Edit | SNAP

The user can edit the existing SNAP information. To the left of the screen, the Active Record denotes basic information regarding the Vendor. The Edit field definitions are the same as the Add page. See the Figure below for the Sales | SNAP Edit screen for Vendor.

*Navigation Path: Vendor Lookup | Add Button | SNAP page | Edit Icon*

The screenshot displays the 'Vendor SNAP Edit Page' within the HANDS WIC System. The interface includes a top navigation bar with the user 'CTHURBER' and the system name '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH'. Below this is a secondary menu with options like 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The 'Vendor' menu item is active, leading to a sub-menu with 'Back to List', 'Communication', 'Demographics', 'Education', 'Sales', and 'SNAP'. The 'SNAP' section is currently selected, showing a form for editing vendor information. On the left side of the form, there is a sidebar with 'Owner' details: '7461: GENERIC OWNER 1', 'Owner Phone (555) 555-2277', 'Owner Address 100 MAIN STREET, EL MIRAGE AZ 85335', 'Vendor 0890: GENERAL GROCERY', 'Vendor Status AUTHORIZED (NEW)', 'Vendor Phone (555) 555-3261 ext. 123', 'Vendor Address 110 MAIN STREET, IMMANUEL MISSION AZ 86514', 'Risk Level MEDIUM TO HIGH RISK', and 'Compliance Case N/A'. The main form area contains fields for 'Status' (AUTHORIZED (NEW)), '\*Authorization ID' (3243242), '\*Authorization Date' (11/11/2014), '\*Regional Office Code' (B - MOUNTAIN PLAINS REGION), '\*Gross Sales' (3,234.00), '\*Food Sales' (11,101.64), and '\*Average Monthly Sales' (23,234.00). There are also three checkboxes: 'High Risk', 'SNAP Investigation', and 'SNAP Disqualified'. At the bottom right of the form, there are 'Save' and 'Reset' buttons.

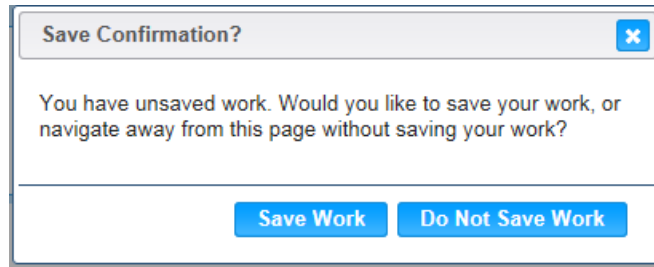
*Figure : Vendor SNAP Edit Page*

*Calculations: None*

*Background Process(es):*

- 1) The system performs a three step save process when saving a new Vendor SNAP
  - 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.

- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.
- 3) If the user attempts to navigate off the Vendor SNAP page without saving any modifications, the Save Confirmation notification appears.



- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Vendor Lookup page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Vendor Lookup main page.

### 3 FOOD BENEFIT LOOKUP

The purpose of this screen is to allow the Vendor management staff to look up the Food Instruments for a Vendor using Vendor ID and Name, Owner ID and Name, Redemption Date Ranges or FI Serial Number ranges. The search will also retrieve all replacement Food Instruments associated with the Vendor or Owner. See the Figure below for the Food Benefit Lookup screen for Vendor.

Navigation Path: Vendor Menu / FB Lookup or Vendor tab / Navigation / FB Lookup

The screenshot shows the 'Food Benefit Lookup' interface. At the top, there is a navigation bar with 'Vendor' highlighted. Below it, the 'Search Criteria' section includes input fields for 'Owner Name', 'Vendor Name' (containing 'UNIVERSAL MARKET'), 'Redemption Date From', 'Redemption Date To', 'FI Serial Number From', and 'FI Serial Number To'. A 'Redemption Totals' section displays four summary statistics: Total Redemption Amount (\$14,014.27), Total FB's Redeemed (1085), Total Rejection Amount (\$24.73), and Total FB's Rejected (2). The 'Search Results' section features a table with 13 columns: Serial Number, Issue Date, First Date To Use, Printed By, Last Date To Use, Redeemed Date, Maximum Amount, Replacement, Compliance Buy, Redemption Amount, Cleared Date, Reject Date, and Reque. The table lists 10 results for 'UNIVERSAL MARKET' with various serial numbers and dates. At the bottom, there is a 'Row count' dropdown set to 10 and 'Search' and 'New Search' buttons.

Figure : Food Benefit Lookup page

Search Fields:


- **Owner Name** – The user can enter the Corporation Name to search for. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is optional.
- **Vendor Name** – The user can search by Vendor/Applicant’s name. See Background Processes for description on Wild Card searches. The user can also enter the Vendor ID or the Applicant ID to search. The Vendor ID is a unique, four-digit, user-defined identification number for a Vendor. This field is optional.

- **Redemption Date From** – The user can search based on the Redemption Date range. The first date that the Food Instruments were redeemed on. This field is optional.
- **Redemption Date To** – The last date that the Food Instruments were redeemed on for the Redemption Date range. The value must be equal to or later than the Redemption Date From value. This field is optional.
- **FI Serial Number From** – The user can search for a range of Food Instrument Serial Numbers. Enter the lowest Serial Number to search for. To search for a single Serial Number, enter the same value in the Ending Serial Number field. This field is optional.
- **FI Serial Number To** – Enter the highest Serial Number to search for. To search for a single Serial Number, enter the same value in the Starting Serial Number field. This field is optional.

*Redemption Totals Fields:*

- **Total Redemption Amount** – The sum of the redemption amounts for all retrieved food instruments. This field is display only.
- **Total FB's Redeemed** – The number of Food Instruments retrieved. This field is display only.
- **Total Rejection Amount** – The sum of the Food Instrument amounts that were rejected. This field is display only.
- **Total FB's Rejected** – The number of rejected Food Instruments retrieved. This field is display only.

*Search Result Fields:*

-  **(Edit Icon)** – When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
- **Serial Number** – The Serial Number of the Food Instrument. This can assist in locating and tracking the check. This field is display only.
- **Issue Date** – The Issue Date is the date the Food Instrument was actually printed. This field is display only.
- **First Date To Use** – The first date to use the Food Instrument. This field is display only.
- **Printed By** – The user ID of the person who created the Food Instrument. This field is display only.
- **Last Date to Use** – The last date to use the Food Instrument. This field is display only.
- **Redeemed Date** – The amount for which the Food Instrument was cashed. This field is display only.
- **Maximum Amount** – The maximum amount that the Food Instrument can be redeemed for. This field is display only.
- **Replacement** – A Yes/No flag that indicates the Food Instrument was a Replacement check. This field is display only.
- **Compliance Buy** – A Yes/No flag that indicates the Food Instrument was a Compliance Buy. This field is display only.
- **Redemption Amount** – The amount for which the Food Instrument was cashed. This field is display only.

- **Cleared Date** – The date in which the Food Instrument was deposited to the bank on which it was drawn, and the movement of its face amount in the opposite direction. This field is display only.
- **Reject Date** – The date on which the Food Instrument was rejected. This field is display only.
- **Requested Amount** – The amount requested by the Vendor when the food instrument was redeemed. This field is display only.
- **Approved Amount** – The amount approved during re-validation. This field is display only.
- **Approved By** – The staff member who approved the re-validated food instrument. This field is display only.
- **Approved Date** – The date that the re-validated Food Instrument was approved. This field is display only.
- **Void Date** – The date that the Food Instrument was voided. This field is display only.
- **Vendor Name** – The name of the Vendor. This field is display only.
- **Owner Name** – The name of the Owner. This field is display only.

*Buttons:*

- **Search** – Press this button to perform a search with the search criteria entered.
- **New Search** – Press this button to clear search criteria entered and search results retrieved.

*Calculations:*


- 1) The system calculates the total redemption amount which is displayed within the Total Redemption Amount field. The system also provides the number of Food Instruments redeemed which appears within the Total FB's Redeemed field.
- 2) The system calculates the total rejection amount which is displayed within the Total Rejection Amount field. The system also provides the number of Food Instruments rejected which appears within the Total FB'

*Background Processes:*

- 1) Search is performed for matching records based on criteria entered. Search output appears in the Result Grid.
- 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.



### 3.1 Food Benefit Lookup Edit

For all Food Benefits displayed in the Result Grid, the  (Edit Icon) will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing. The screen presents a read-only view of the Food Instrument details. See the Figure below for the Food Benefit Lookup | Edit screen for Vendor.

*Navigation Path: FB Lookup | Edit Icon*



Serial Number	Issue Date	First Date To Use	Last Date To Use
1234567813	7/2/2013	8/31/2013	9/29/2013
<input type="checkbox"/> Replacement	<input type="checkbox"/> Compliance Buy	Reject Date	Cleared Date
			9/26/2013
Printed By	Redeemed Date	Redemption Amount	Maximum Amount
	9/26/2013	11.34	200
Requested Amount	Approved Amount	Approved By	Approved Date
Void Date			

*Figure: Food Benefit Edit page*

#### Fields:

- **Serial Number** – The Serial Number of the Food Instrument. It can assist in locating and tracking the check. This field is display only.
- **Issue Date** – The Issue Date is the date the Food Instrument was actually printed. This field is display only.
- **First Date To Use** – The first date to use the Food Instrument. This field is display only.
- **Last Date to Use** – The last date to use the Food Instrument. This field is display only.
- **Replacement Checkbox** – When the checkmark is present, it indicates the Food Instrument as a Replacement check. This field is display only.

- **Compliance Buy Checkbox** – When the checkmark is present, it indicates the Food Instrument was a Compliance Buy. This field is display only.
- **Reject Date** – The date on which the Food Instrument was rejected. This field is display only.
- **Cleared Date** – The date in which the Food Instrument was deposited to the bank on which it was drawn, and the movement of its face amount in the opposite direction. This field is display only.
- **Printed By** – The user ID of the person who created the Food Instrument. This field is display only.
- **Redeemed Date** – The amount for which the Food Instrument was cashed. This field is display only.
- **Redemption Amount** – The amount for which the Food Instrument was cashed. This field is display only.
- **Maximum Amount** – The maximum amount that the Food Instrument can be redeemed for. This field is display only.
- **Requested Amount** – The amount requested by the Vendor when the food instruments was redeemed. This field is display only.
- **Approved Amount** – The amount approved during re-validation. This field is display only.
- **Approved By** – The staff member who approved the re-validated food instrument. This field is display only.
- **Approved Date** – The date that the re-validated Food Instrument was approved. This field is display only.
- **Void Date** – The date that the Food Instrument was voided. This field is display only.

*Buttons:*

- **Back to List** – Press this button to go back to the Food Benefit Search Results page with previous results.
- **New Search** – Press this button to go back to the Food Benefits Lookup page. The previous search results will be cleared.

*Calculation(s):* None

*Background Process(es):* None

## 4 REPLACEMENT CHECKS LOOKUP

The HANDS system allows vendors to submit food instruments that have been rejected for payment to the State office for a second level review. The system must pay multiple rejected food instruments with one replacement check. A user with a specified role will be able to enter a food instrument ID submitted for a second level review and have the reject reason, date and amount information displayed if data exists in the system. The users will also be able to enter replacement checks for FIs that are sent directly to the state office by manually entering the information in this screen. Note: Replacement Checks are not printed from the HANDS system, as the check stock used for Replacement Checks is not supported. Replacement Checks are still manually written. See the Figure below for the Replacement Checks screen for Vendor.

Navigation Path: Vendor Menu / Replacement Checks or Vendor tab / Navigation / Replacement Checks

The screenshot shows the 'Replacement Checks' screen for a vendor. The top navigation bar includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The 'Vendor' tab is selected. Below the navigation is a search area with the following fields:

- Owner ID / Owner Name: [Empty text box]
- Vendor Name: UNIVERSAL MARKET
- Vendor ID: 2290
- Starting Serial Number: [Empty text box]
- Ending Serial Number: [Empty text box]
- Mailing Address: 1449 N. ARIZONA BLVD.
- Billing Address: 1449 N. ARIZONA BLVD. (with a 'Copy Mailing To Billing' button)
- City, State, ZIP Code, and County: COOLIDGE, AZ 85228 PINAL

Below the search area is a table of replacement checks:

Serial Number	Vendor ID	Issue Date	Redeemed Amount	Not-To-Exceed Amount	Reject Date	Reject Reason	Replacement Amount	Preview Check
1234567820	2290	8/24/2012	\$27.24	\$200.00	11/13/2013	F - DEPOSITED TOO LATE / VOID	\$0.00	Preview Check
1234567821	2290	4/25/2014	\$67.96	\$200.00	4/30/2014	D - MISSING SIGNATURE / VOID	\$0.00	Preview Check
1234567822	2290	9/30/2010	\$11.74	\$200.00	10/11/2011	F - DEPOSITED TOO LATE / VOID	\$0.00	Preview Check
1234567823	2290	9/30/2010	\$3.72	\$200.00	10/11/2011	F - DEPOSITED TOO LATE / VOID	\$0.00	Preview Check
1234567824	2290	8/1/2012	\$26.74	\$200.00	1/14/2013	F - DEPOSITED TOO LATE / VOID	\$0.00	Preview Check

At the bottom of the table, there is a 'Row count: 10' dropdown and 'Showing 1-5 of 5' text. Below the table is a 'Total Replacement Amount' field and 'Search', 'Save', and 'Reset' buttons.

Figure : Vendor Replacement Checks page

### Search Fields:

- Owner ID/Owner Name** – The user can search by Corporation Name or Owner ID (a system generated numeric value used to uniquely identify each Owner) to search for, either value is accepted to perform the search. Possible field values will be available for

selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is optional.

- **Vendor Name** – The user can search by Vendor/Applicant’s name. See Background Processes for description on Wild Card searches. This field is optional.
- **Vendor ID** – The user can enter the Vendor ID or the Applicant ID to search. The Vendor ID is a unique, four-digit, user-defined identification number for a Vendor.
- **Starting Serial Number** – The user can search for a range of Food Instrument Serial Numbers. Enter the lowest Serial Number to search for. To search for a single Serial Number, enter the same value within the Ending Serial Number field.
- **Ending Serial Number** – Enter the highest Serial Number to search for. To search for a single Serial Number, enter the same value within the Starting Serial Number field.
- **Mailing Address:**
  - **Address 1** – The first of two Mailing Address fields available for the Vendor’s mailing address. The Mailing Address 1 allows alphanumeric and special characters. This field is mandatory.
  - **Address 2** – The second of two Mailing Address fields available for the Vendor’s mailing address. The Mailing Address 2 allows alphanumeric and special characters. This field is optional.
  - **City, State, ZIP Code, and County** – The Mailing City, State, ZIP Code, and County portion of the Vendor Mailing Address. Any portion of this field (i.e. State or ZIP Code) can be manually entered for this field. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is mandatory.
- **Billing Address:**
  - **Address 1** – The first of two Mailing Address fields available for the Vendor’s mailing address. The Mailing Address 1 allows alphanumeric and special characters. This field is mandatory.
  - **Address 2** – The second of two Mailing Address fields available for the Vendor’s mailing address. The Mailing Address 2 allows alphanumeric and special characters. This field is optional.
  - **City, State, ZIP Code, and County** – The Mailing City, State, ZIP Code, and County portion of the Vendor Mailing Address. Any portion of this field (i.e. State or ZIP Code) can be manually entered for this field. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is mandatory.

*Replacement Check Grid Fields:*

- **Serial Number** – The Serial Number of the Food Instrument. It can assist in locating and tracking the check. This field is display only.
- **Vendor ID** – The Vendor ID is a unique, four-digit, user-defined identification number for a Vendor. This field is display only.
- **Issue Date** – The Issue Date is the date the Food Instrument was actually printed. This field is display only.
- **Redeemed Amount** – The amount for which the Food Instrument was cashed. This field is display only.

- **Not-To-Exceed Amount** – The peer group maximum redemption amount for the Food Instrument. If the amount of the Food Instrument is greater than this value, the bank will not pay the Food Instrument. This field is display only.
- **Reject Date** – The date on which the Food Instrument was declined or rejected. The field is display only.
- **Reject Reason** – The description of why the Food Instrument was declined or rejected. This field is display only.
- **Replacement Amount** – The new amount of the Food Instrument. The Replaced Amount cannot be greater than the “Not-to-exceed” Amount. If the Rejected Food Instrument is not going to be paid then the Replacement Amount = 0. Display only.
- **Preview Check Button** – Pressing this button brings up the Check Preview modal. This modal displays the Replacement Food Instrument. This modal cannot be used to print the Food Instrument.

**Check Preview**

NEED HELP? Mon. - Fri. 8 AM - 5 PM, CALL 1 800 333 WIC  
 FEDERAL PROSECUTION: VOID IF ALTERED  
 PARTICIPANT ID: 123456234 PARTICIPANT NAME: Doe, Jane DRAFT TYPE: 003266AZ

36 OZ (UP TO 36 OZ) WIC APPROVED CEREAL (NOT INFANT)  
 2 GAL FAT FREE / SKIM / NONFAT OR LOWFAT (1%) MILK (GALLON CONTAINERS ONLY)  
 32 OUNCES (2 PACKAGES - 16 OZ EACH ONLY) WIC APPROVED BREAD, BROWN RICE, AND/OR TORTILLAS (WHOLE WHEAT OR CORN)  
 2 CONTAINER (64 OZ ) WIC APPROVED 100% JUICE  
 2 CONTAINER (1 LB ) WIC APPROVED 100% JUICE

**VOID**

58440270

VENDOR MUST DEPOSIT WITHIN 60 CALENDAR DAYS FROM FIRST DATE TO USE  
 FIRST DATE TO USE: 10/23/2012  
 DATE OF USE:   
 ACTUAL \$ AMOUNT:   
 \$ CONVERSION ONLY:   
 PAY TO THE ORDER OF:   
**VOID**

PARTICIPANT, DO NOT SIGN UNTIL TIME OF PURCHASE  
 SIGNATURE AT STORE:  
**VOID**

123456234 Doe, Jane Family ID: 73463723

0058440270 to 10/23/2012 to 0058440270 11/21/2012

**void**  
NON-NEGOTIABLE

Authorized Rep or Proxy Signature \_\_\_\_\_

**OK**

- (Close Window) – The window is closed and no action is taken.
- **OK** – The OK button closes the modal.
- (Edit Icon) – For all checks displayed in the Result Grid, the Edit Icon will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing. The Redeemed Amount, Not-to-Exceed Amount, Reject Reason, and Replacement Amount are available for Edit.

- **X (Close Window)** – The window is closed and no action is taken.
- **OK** – The OK button closes the modal. Any changes are applied to the Replacement Check Result Grid. *Note:* The record will not be permanently removed until a Save is performed.
- **Cancel** – Press this button to close the Edit Modal and return to the Replacement Check Result Grid.

*Other fields:*

- **Total Replacement Amount** – This field is system generated and is a total of all of the items selected for replacement. This field is display only.

*Buttons:*

- **Search** – Press this button to perform a search with the search criteria entered.
- **Save** – Press this button to save the Replacement Check record. The Total Replacement Amount is also calculated for selected checks. At least one check must be selected by marking the check box to the left of the Serial Number within the Result Grid.
- **Reset** – Press this button to undo any modifications made to the Replacement Check record since the last Save was performed.

*Calculation(s):*

- 1) After the Save button is pressed, the form will total the Replacement Amounts for selected checks into the Total Replacement Amount field.

*Background Processes:*

- 1) Search is performed for matching records based on criteria entered. Search output appears in the Result Grid.
- 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.

## 5 FI PEER GROUP AVERAGES

The system allows the State to modify the maximum amount that will be paid for a Food Instruments Type by changing the Override % or Standard Deviation values. It also allows the State to directly change the Maximum Amount. The bank will not pay a Food Instrument with a request value greater than the Vendor’s Peer Group Average plus the Override % or Standard Deviations. See the Figure below for the FI Peer Group Averages screen for Vendor.

Navigation Path: Vendor Menu | FI Peer Group Averages or Vendor tab | Navigation | FI Peer Group Averages

The screenshot shows the 'Vendor FI Peer Group Averages' page. At the top, there is a navigation bar with the user 'CTHURBER' and the department '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH'. Below this is a menu with options like Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. The main content area has a 'FI Peer Group Averages' dropdown menu. Under 'Search Criteria', there is a field for '\*Peer Group ID' with a dropdown menu showing 'NATIONAL, REGIONAL, OR LOCAL CHAIN' and a text field for 'FI Type'. Below that is a 'Settings' section with two input fields: 'Apply # Standard Deviations to All' and 'Apply Override % to All'. The main part of the page is a table titled 'Peer Group Averages' with columns: Peer Group ID, FI Type, Avg Redemption, Max Amount, Override %, Std Dev, # Std Devs, # Avg Particip, and Run Date. The table contains 11 rows of data. At the bottom, there is a pagination bar showing 'Row count: 10' and 'Showing 1-10 of 3546'. There are also 'Search', 'Save', and 'Reset' buttons at the bottom right.

	Peer Group ID	FI Type	Avg Redemption	Max Amount	Override %	Std Dev	# Std Devs	# Avg Particip	Run Date
+	2	99999999	0	200	8	0	0.00	0	
+	2	006166KM	0	200	8	0	3.00	0	12/30/2014
+	2	006165KM	0	200	8	0	3.00	0	12/30/2014
+	2	006164KM	0	200	8	0	3.00	0	12/30/2014
+	2	006163AZ	0	200	8	0	3.00	0	12/23/2014
+	2	006162AZ	0	200	8	0	3.00	0	12/23/2014
+	2	00616155	0	200	8	0	0.00	0	
+	2	00616055	0	200	8	0	0.00	0	
+	2	00615955	0	200	8	0	0.00	0	
+	2	006158AZ	0	200	8	0	0.00	0	

Figure : Vendor FI Peer Group Averages page


### Search Fields:

- **Peer Group ID** – The user can use a search for a specific Peer Group ID. Examples of Peer Groups are Pharmacy, Large Rural Independent, and National, Regional, or Local Chain. This field value can be selected from the drop down. This field is optional.
- **FI Type** – If blank, data for all FI Types is returned. The user can further restrict the search results by entering the leading characters of a set of FI Types, or by entering a full FI Type ID. This field is optional.

*Settings Fields:*

- **Apply # Standard Deviations to All** – The Standard Deviation can be changed for a peer group and FI type. The Apply # Standard Deviations to All field is applied to all records currently displayed when the Save button is pushed. This field is optional, but the user may only change the Standard Deviation or the Override % on the same update.
- **Apply Override % to All** – The Override % can be changed for a peer group and FI type. The Apply Override % to All field is applied to all records currently displayed when the Save button is pushed. This field is optional, but the user may only change the Standard Deviation or the Override % on the same update.

*Peer Group Averages Result Grid Fields:*

- **Peer Group ID** – A unique number given to each Peer Group Type. . For more information, please refer to the Sys Admin | Vendor Base Tables for Peer Groups.
- **FI Type** – The FI Type ID.
- **Avg Redemption** – The average redemption for the FI Type and Peer Group.
- **Max Amount** – The maximum redemption amount for the FI Type and Peer Group.
- **Override %** - The percent above the maximum amount that is will be accepted.
- **Std Dev** – The standard deviation of the set of FI redemption values for this FI Type. A value of 0 indicates there is no variance in redemption amount.
- **# Std Dev** –The standard deviation above the maximum amount that will be accepted.
- **# Avg Particip** – The average number of participants who redeemed this food instrument per month.
- **Run Date** – The date on which the FI statistics were last calculated.
-  **(Edit Icon)** – When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.

*Buttons:*

- **Save** – Press this button to apply the Standard Deviations or Override % record.
- **Reset** – Click to undo any modifications made to the record since the last Save was performed.

*Calculation(s):* None.

*Background Processes:*

- 1) The number of records shown in the Peer Group Averages is determined by the selection criteria filled in the Search Criteria. If any selection parameters are entered, Peer Group Average records that meet the criteria are displayed. A Peer Group ID must be provided. No Peer Group Average records can be added from this screen, only modified.
- 2) When the user changes the Override % within the Apply to All field and clicks the Save button, the new Override % value is applied to all values currently being shown in the Peer Group Averages Result Grid.
- 3) When the Override % values are changed, the Maximum Redemption Amount values are automatically recalculated.
- 4) The maximum redemption amount is sent to the bank at the start of the End of Day. The Peer Group Averages fields are recalculated by the end of End of Day script, based on the FI's redeemed during that cycle.

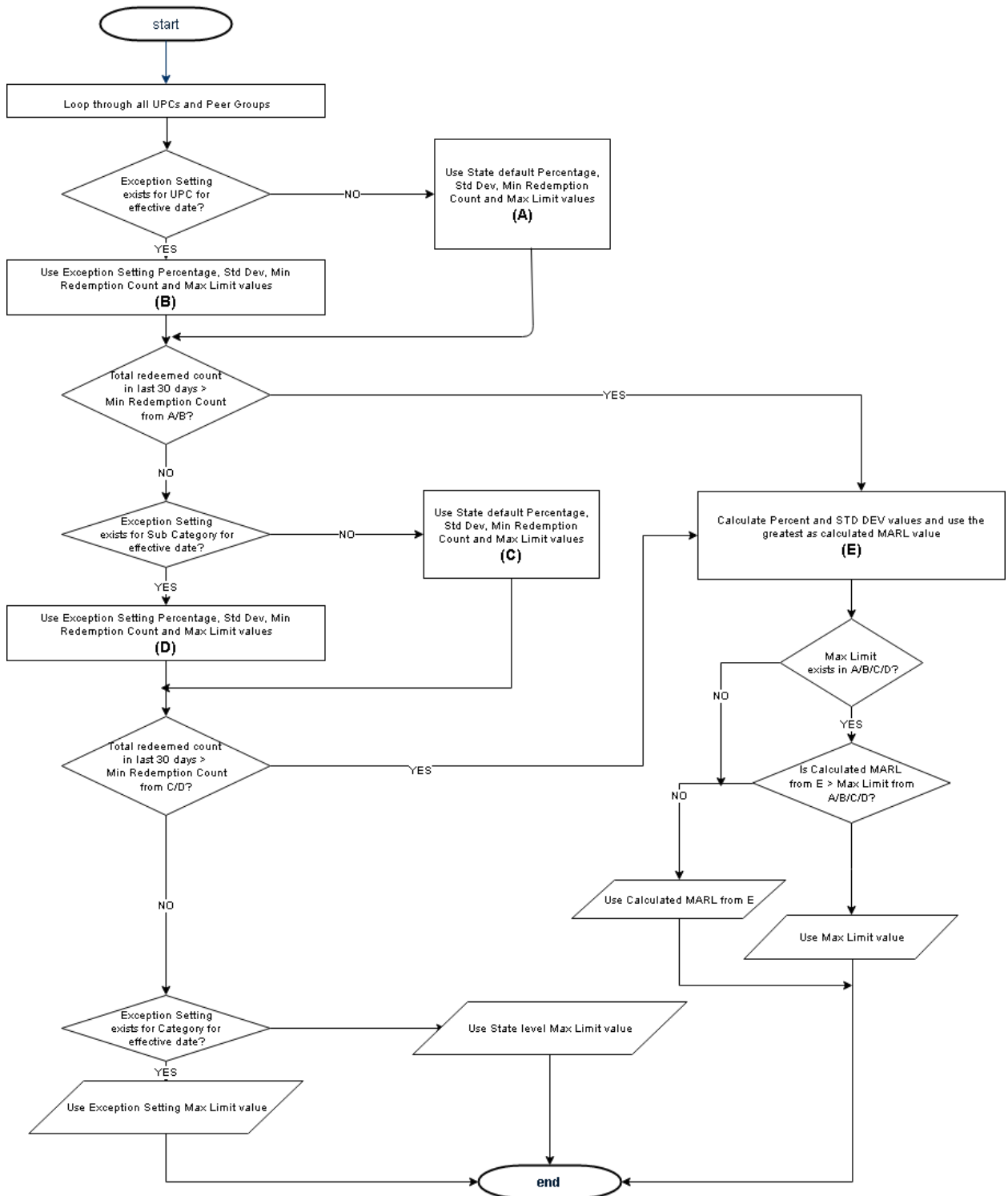


## **6 MARL EXCEPTIONS SETTINGS**

This document discusses the business and functional requirements for new and enhanced maximum allowable reimbursement level (MARL) functionalities in HANDS for usage in the new Electronic Benefits Transfer (EBT) system. EBT functionality will encompass changes to the many other existing processes in HANDS, the requirements for which will be explained in the respective requirements documents.

MARL has also been referenced as NTE (Not To Exceed). These terms are synonymous with each other. MARL will be the term used throughout the rest of this document for consistency. Mockups will retain both MARL and NTE since Users of the interfaces may be used to referring to either term.

### 6.1 EOD MARL Calculation



- Default MARL values, also referred to as the “config” in the MARL processing workflow above, are system-set for the following fields and will be applied when there are not sufficient redemptions at the UPC, Subcategory and category levels if there are no exceptions or overrides present. The values in the config that can be set are the following:

1. minimum number of units required for a calculation to occur
2. the number of standard deviations to be applied
3. the percentage applied
4. the max-dollar limit for a unit being redeemed if there are no exceptions or overrides set.

Optionally, the State may bypass the system-set default MARL values by entering exceptions on the **MARL Exceptions Settings** screen.

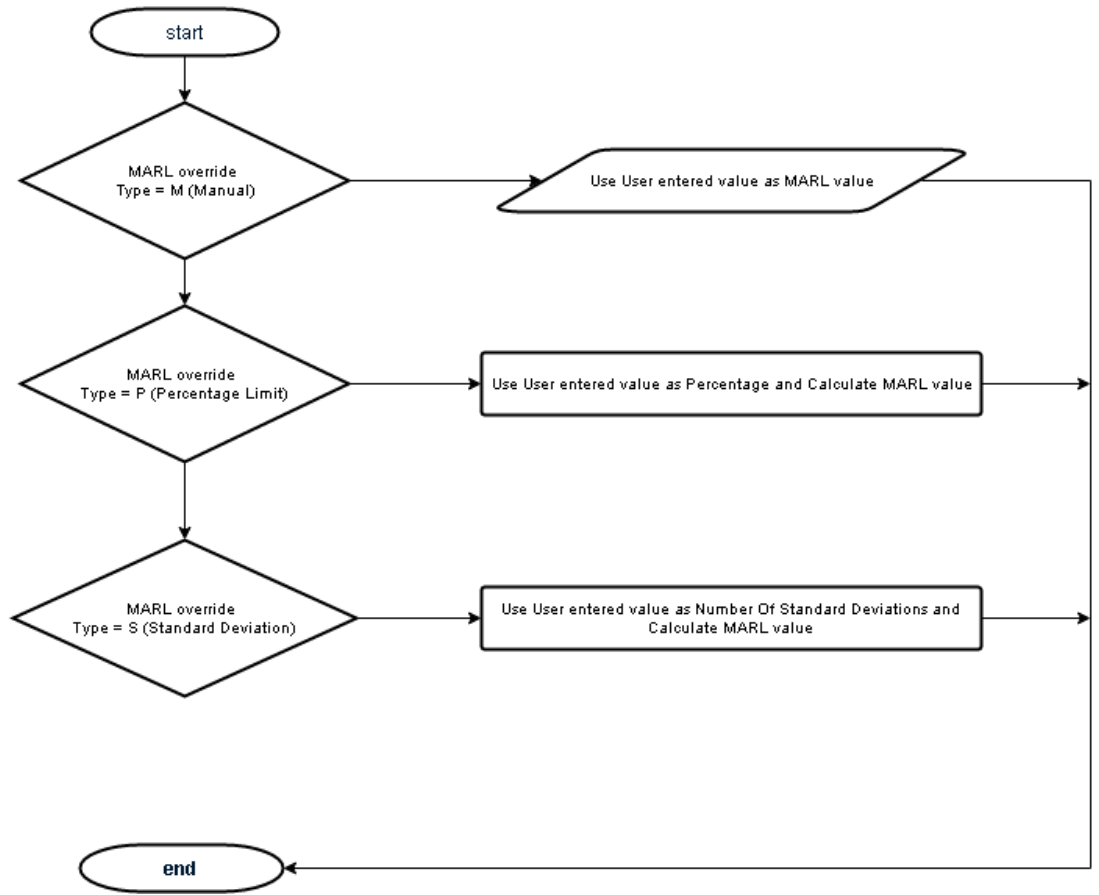
- **MARL Exceptions Settings** screen will take precedence over the default MARL values as illustrated in the above workflow diagram. These exceptions may be in the form of a specific monetary value or in the specification of a different number of standard deviations, minimum # of units, or percentage to be used in calculations.
- **MARL Overrides screen** will take precedence over the exception settings in the **MARL Exceptions Settings** screen as illustrated in the above workflow diagram.
- Processing will be hierarchical, beginning at the UPC level, then Food Subcategory level, and finally at the Food Category level. In other words, the settings at UPC level will take precedence over food Subcategory level when the minimum number of units required are met for the UPC level, and the Subcategory level will take precedence over the food category level when the number of units required are met for the Subcategory level. When there are not sufficient units to set a MARL at either the UPC or the Subcategory level, the food category max limit becomes the MARL.
- At food category level, the max limit setting will be the only configurable value.
- Hierarchical logic
  - The max limit for the food category within each peer group represents the highest value for any MARL within that food category in the absence of sufficient data to calculate a MARL at the UPC or Subcategory level or there is no exception or override set for the subcat or UPC. For each UPC that is present in the system, for each peer group, the WIC HANDS system will determine if the Minimum # of units is met for redemptions within the last 30 days and calculate MARL values based on percentages and standard deviations from the table. The greater of the two will be used as the MARL, unless it exceeds the max limit for that UPC, if one is entered. If the minimum number of redemptions is not met for a UPC within the last 30 days, the system will then determine whether the minimum number of redemptions occurred at the food Subcategory level. See EOD MARL Calculation diagram which explains this workflow.
  - The WIC HANDS system will use the percentage and standard deviation from MARL Exceptions Settings if an exception exists. If none exists, it will use the default MARL values in the Applications Setting table.

- If the UPC doesn't have enough redemptions within last 30 days for that peer group, then it will check at the next level (i.e., food Subcategory) for enough redemptions within last 30 days and calculate MARL values based on the percentage and standard deviations and will use the greater of the two as MARL. However, if a Max Limit is entered that is lower than the calculated MARL then the max limit will be used as MARL. If there is no Max limit entered for the level the MARL is being calculated, it will not do a comparison to a Max Limit and the MARL will remain as the higher of the mean plus either the percentage or standard deviation times the No. of standard deviations. If the food Subcategory doesn't have enough redemptions within the last 30 days for that peer group, then the system will determine if the food category has a max limit set in **MARL Exceptions Settings** screen, and will use that value as MARL.
- If none of the above conditions are met, then the WIC HANDS system will use the default MARL values.
- If at any of the above levels there is an override value set in **MARL Overrides screen**, then the System will begin to use that value as the MARL at that level as of the Effective Start Date and that value will supersede any other calculated value as MARL until the date entered in the Effective End Date.
- NOTE: A50 vendors must always be limited to the mean of all other vendors, with no further adjustments allowed in terms of an allowance for standard deviations or percentages. No overrides or exceptions will be allowed. A50's will be excluded from the peer group dropdown when adding an exception or override. The minimum number of units in the applications setting should be applied for all A50 vendors. If there are sufficient units, set the MARL at the UPC level. If not, and there are sufficient units at the Subcategory level, set the MARL at that level. If there are insufficient units at either level, use the food category default as the MARL. If there are no food category defaults set, then use the max dollar limit in the application settings as the MARL.

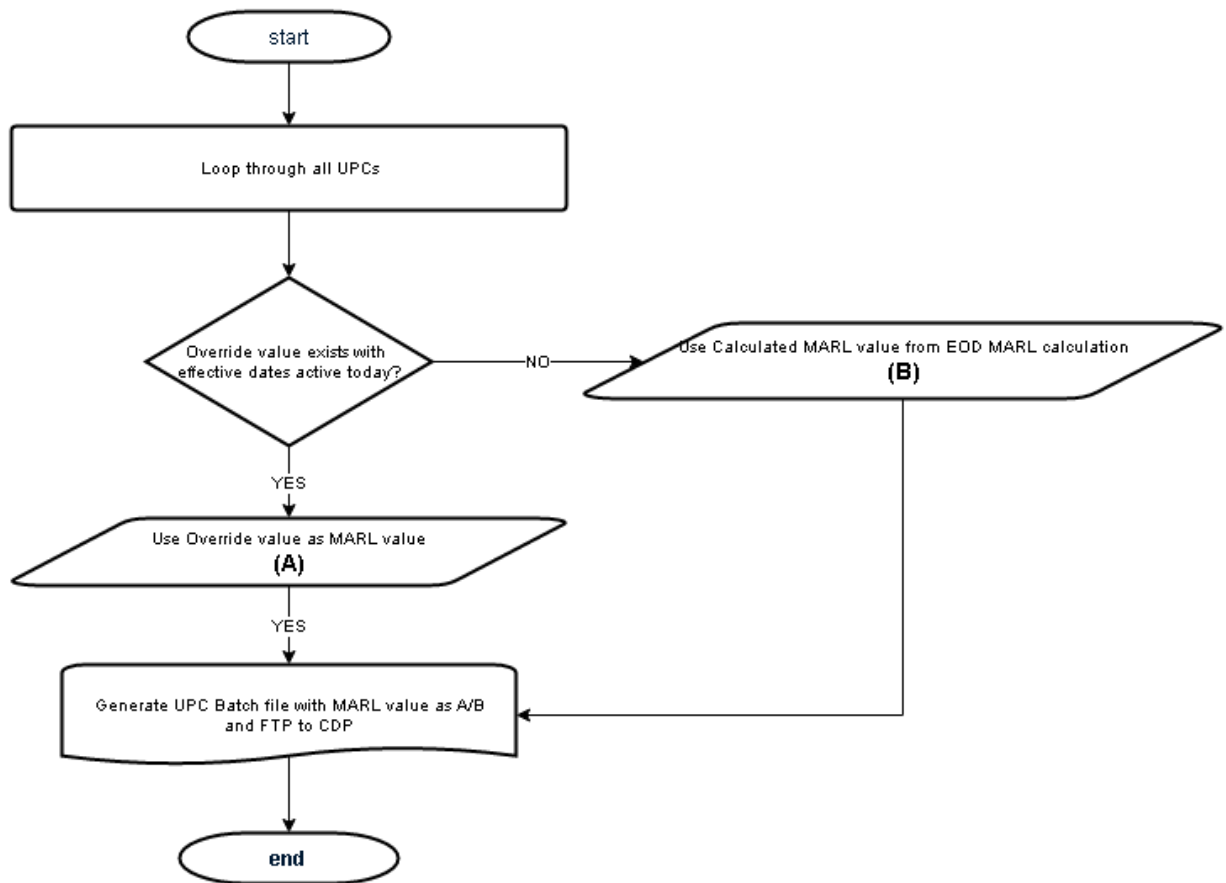
The benefit of this approach is that it balances the problems that would ordinarily be associated with setting the limits at either too high a level (food Subcategory may not adequately take into account package size) or too low a level (UPC code may not have sufficient volume).

EBT redemptions that exceed the weekly-established MARL are paid at the MARL established for each UPC by vendor peer group regardless of whether the MARL was set at the UPC level, sub category level or category level.

### 6.2 MARL Override Process



### 6.3 NTE Transmission to CDP



### 6.4 Search MARL Exceptions Settings

- To allow Users to search for MARL settings.

GSWIFT [Log Off] 00 - BUREAU OF NUTRITION AND PHYSICAL ACTIVITY / 00 - ALL CLINICS

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

MARL Exceptions Settings

MARL Exceptions Settings

Food Category  Food Subcategory  Upc  Peer Group PHARMACY

MARL Exception Settings Search Results

Food Category	Food Subcategory	Upc	Peer Group	Min # of Units	No Standard Deviation	Percentage Limit	Max Limit	Effective Start Date	Effective End Date
13 - INFANT MEATS			<input checked="" type="checkbox"/> PHARMACY				10	01/01/2017	
08 - FISH	003 - SARDINES		<input checked="" type="checkbox"/> PHARMACY	10	2.5	9	5	01/27/2017	
21 - INFANT FORMULA	003 - ENFAMIL LIPIL WITH IRON		<input checked="" type="checkbox"/> PHARMACY	0	0	0	15	02/01/2017	
21 - INFANT FORMULA			<input checked="" type="checkbox"/> PHARMACY				12	02/01/2017	

<< < > >> Row count: 10 Showing 1-4 of 4

Add Search New Search

### Screen Behaviors and Validations

1. System should exclude the food category for Fruits and Vegetable (Food Category Code: 19) in the Food Category combo box.
2. A food category must be selected before a Food Subcategory can be selected.
3. A food Subcategory must be selected before a UPC can be selected.
4. Fruits and Vegetables are excluded from any search criteria/results.

### 6.5 Add MARL Exceptions Settings

- To allow Users to add new MARL settings.

GSWIFT [Log Off] 00 - BUREAU OF NUTRITION AND PHYSICAL ACTIVITY / 00 - ALL CLINICS

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MARL Exceptions Settings

MARL Exceptions Settings

Food Category Food Subcategory Upc Peer Group PHARMACY

MARL Exception Settings Search Results

Food Category	Food Subcategory	Upc	Peer Group	Min # of Units	No Standard Deviation	Percentage Limit	Max Limit	Effective Start Date	Effective End Date
13 - INFANT MEATS			PHARMACY				10	01/01/2017	
08 - FISH	003 - SARDINES		PHARMACY	10	2.5	9	5	01/27/2017	
21 - INFANT FORMULA	003 - ENFAMIL LIPIL WITH IRON		PHARMACY	0	0	0	15	02/01/2017	
21 - INFANT FORMULA			PHARMACY				12	02/01/2017	

Row count: 10 Showing 1-4 of 4

Add Search New Search

Default search screen highlighting the Add button

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Back to List

\*Food Category Food Subcategory Upc \*Peer Group

Min # of Units No of Standard Deviation Percentage Limit \*Max Limit

\*Effective Start Date Effective End Date

Save Reset

Exception settings Add new settings screen

**Screen Behaviors and Validations**

1. When setting at the food category level only, minimum number of units, no of standard deviation and percentage limit will be disabled because food Category max limit value is the only allowable entry for food category.  
When selecting a Subcategory or UPC, minimum number of units, no standard deviation and percentage limit will be required. Max limit will be optional.
2. Food Category combo needs to be selected to have Food Subcategory populated.
3. Food Subcategory combo needs to be selected to have UPC populated.
4. One of the following must be entered



- 4.1. Food Category
- 4.2. Food Subcategory
- 4.3. UPC
5. A50's will be excluded from the peer group dropdown when adding an exception or override.

## 6.6 Edit MARL Exceptions Settings

- To allow Users to edit existing MARL settings.

The screenshot displays the 'Edit MARL Exceptions Settings' form within the GSWIFT system. The form is organized into several sections:

- Header:** GSWIFT [Log Out] and 00 - BUREAU OF NUTRITION AND PHYSICAL ACTIVITY 700 - ALL CLINICS
- Navigation:** Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, Reports, Help
- Form Fields:**
  - \*Food Category: 13 - INFANT MEATS (dropdown)
  - Food Subcategory: (empty dropdown)
  - Upc: (empty text input)
  - \*Peer Group: PHARMACY (dropdown)
  - Min # of Units: (empty text input)
  - No of Standard Deviation: (empty text input)
  - Percentage Limit: (empty text input)
  - \*Max Limit: 10 (text input)
  - \*Effective Start Date: 01/01/2017 (text input)
  - Effective End Date: (empty text input)
- Buttons:** Save, Reset

Screen rendered after clicking the edit icon from the search results screen

### Screen Behaviors and Validations

1. When setting an exception at the food category level only, minimum number of units, no standard deviation and percentage limit will be disabled.
2. When selecting a Subcategory or UPC, minimum number of units, no standard deviation and percentage limit will be required. Max limit will be optional.
3. If a user enters a standard deviation, min # of units, or percentage at Subcategory level and there are no exceptions or overrides set for the UPC(s) that is being processed, then system will take the state config to evaluate if redemption count for that UPC doesn't meet the state config min # of units, then it will use the settings entered at the Subcategory level to calculate MARL (using UPCs under that subcategory) and apply MARL value to the UPC that is being processed.
4. Food Category combo needs to be selected to have Food Subcategory populated.
5. Food Subcategory combo needs to be selected to have UPC populated.
6. One of the following fields must be entered
  - i. Food Category
  - ii. Food Subcategory
  - iii. UPC. (auto complete)

## 7 MARL OVERRIDES

### 7.1 Search MARL Overrides

- To allow Users to search for MARL calculations based on Food Category, Food Subcategory, UPC and/or Peer Group. Once data has been found and displayed in the search results data grid, Users can then select records, enter in MARL override options (Override type, Override value, effective start date and effective end date) and preview to see new MARL values based on these override options (see Use Case 5.0 for detailed functionality).

The screenshot shows the 'MARL Overrides' search and override interface. At the top, there is a navigation bar with 'Vendor' selected. Below it, the 'MARL Calculations' dropdown is set to 'MARL Overrides'. The search section includes fields for '\*Food Category', 'Food Subcategory', 'Upc', and '\*Peer Group'. The 'MARL Override Options' section has fields for '\*Override Type', '\*Override Value', 'Effective Start Date', and 'Effective End Date'. The 'MARL Results' table is currently empty, displaying 'No data to show'. A 'Row count' dropdown is set to '10'. At the bottom right, there are buttons for 'Search', 'Preview', 'Apply', and 'Reset'.

*Default MARL Overrides Search and Overrides screen*

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MARL Calculations

**MARL Overrides**

\*Food Category: 03 - EGGS Food Subcategory: [ ] Upc: [ ] \*Peer Group: PHARMACY

**MARL Override Options**

\*Override Type: [ ] \*Override Value: [ ] Effective Start Date: [ ] Effective End Date: [ ]

**MARL Results**

Food Category	Food Subcategory	Upc	Peer Group	Cal MARL Value	Date Calculated	Std Deviation Used	% Used	New MARL Value	Effective Start Date	Effective End Date
03 - EGGS	001 - EGGS	011225086397	PHARMACY	\$50.00	02/09/2017	0	0			
03 - EGGS	001 - EGGS	015400220156	PHARMACY	\$50.00	02/09/2017	0	0			
03 - EGGS	001 - EGGS	041270447584	PHARMACY	\$50.00	02/09/2017	0	0			
03 - EGGS	001 - EGGS	025444000041	PHARMACY	\$50.00	02/09/2017	0	0			
03 - EGGS	001 - EGGS	021130032259	PHARMACY	\$50.00	02/09/2017	0	0			
03 - EGGS	001 - EGGS	085239311578	PHARMACY	\$50.00	02/09/2017	0	0			
03 - EGGS	001 - EGGS	015400220279	PHARMACY	\$50.00	02/09/2017	0	0			
03 - EGGS	001 - EGGS	011110608819	PHARMACY	\$50.00	02/09/2017	0	0			
03 - EGGS	001 - EGGS	015400220125	PHARMACY	\$50.00	02/09/2017	0	0			
03 - EGGS	001 - EGGS	011225020971	PHARMACY	\$50.00	02/09/2017	0	0			

Row count: 10 Showing 1-10 of 10

Search Preview Apply Reset

MARL calculation Search and Overrides screen - search results screen

**Screen Behaviors and Validations**

- System should exclude the food category for Fruits and Vegetable (Food Category Code: 19) in the Food Category combo box.
- The field Override Type will have the following values
- Standard Deviation
- Percentage limit
- Manual Override
- Food Category combo needs to be selected to have Food Subcategory populated.
- Food Subcategory combo needs to be selected to have UPC populated.
- The User will have to conduct a search using the fields (Food Category, Food Subcategory, UPC and/or Peer Group) and select one or more results, prior to being able to preview/Apply New MARL values.
- While the MARL Calculation Override Options (Override Type, Override Value, Effective start date, Effective end date) will be visible on the screen, they will be disabled until search results are rendered in the data grid.

## 7.2 Preview and Apply New Values to MARL Override

- Once data has been found via the search functionality outlined in Use Case 4.0 and displayed in the search results data grid, Users can then select records, enter in MARL calculation override options (Override type, Override value, effective start date and effective end date) and preview to see new MARL values based on these override options. Once satisfied with the New MARL values, the user can then Apply these values overriding what had existed in the system (the Calculated MARL value).

The screenshot displays the 'MARL Calculations' interface. At the top, there is a navigation bar with 'Vendor' selected. Below this, the 'MARL Overrides' section contains search filters: \*Food Category (03 - EGGS), Food Subcategory, Upc, and \*Peer Group (PHARMACY). The 'MARL Override Options' section includes: \*Override Type (Manual), \*Override Value (5.00), Effective Start Date (02/13/2017), and Effective End Date (02/13/2018). The 'MARL Results' table lists 10 rows of data with columns for selection, Food Category, Food Subcategory, Upc, Peer Group, Cal MARL Value, Date Calculated, Stnd Deviation Used, % Used, New MARL Value, Effective Start Date, and Effective End Date. The first row is selected and shows a New MARL Value of \$5. At the bottom, there are navigation buttons: Search, Preview, Apply, and Reset.

<input type="checkbox"/>	Food Category	Food Subcategory	Upc	Peer Group	Cal MARL Value	Date Calculated	Stnd Deviation Used	% Used	New MARL Value	Effective Start Date	Effective End Date
<input checked="" type="checkbox"/>	03 - EGGS	001 - EGGS	011225086397	PHARMACY	\$50.00	02/09/2017	0	0	\$5	02/13/2017	02/13/2018
<input type="checkbox"/>	03 - EGGS	001 - EGGS	015400220156	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	041270447584	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	025444000041	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	021130032259	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	085239311578	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	015400220279	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	011110608819	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	015400220125	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	011225020971	PHARMACY	\$50.00	02/09/2017	0	0			

*MARL calculation Search and Overrides screen - search results screen*

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**MARL Calculations**

**MARL Overrides**

\*Food Category: 03 - EGGS Food Subcategory: Upc: \*Peer Group: PHARMACY

**MARL Override Options**

\*Override Type: Manual \*Override Value: 5.00 Effective Start Date: 02/13/2017 Effective End Date: 02/13/2018

**MARL Results**

<input type="checkbox"/>	Food Category	Food Subcategory	Upc	Peer Group	Cal MARL Value	Date Calculated	Std Deviation Used	% Used	New MARL Value	Effective Start Date	Effective End Date
<input checked="" type="checkbox"/>	03 - EGGS	001 - EGGS	011225086397	PHARMACY	\$50.00	02/09/2017	0	0	\$5	02/13/2017	02/13/2018
<input type="checkbox"/>	03 - EGGS	001 - EGGS	015400220156	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	041270447584	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	025444000041	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	021130032259	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	085239311578	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	015400220279	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	011110608819	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	015400220125	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	011225020971	PHARMACY	\$50.00	02/09/2017	0	0			

Row count: 10 Showing 1-10 of 10

Search Preview Apply Reset

Sample values MARL Calculation Override					
Form Options		Current Values			
Override Type	Override value	Std deviation used	% Used	Calc NTE/MARL value	New NTE/MARL value
Standard Deviation	2	1	2	2	4.3
Percentage limit	5	2	3	4	8
Manual Override	3	1	2	4	3

*Disclaimer: This is sample data only*

MARL calculation Search and Overrides screen - preview screen showing New MARL value for checked items along with sample data table.

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MARL Calculations

**MARL Overrides**

\*Food Category: 03 - EGGS Food Subcategory: Upc: \*Peer Group: PHARMACY

**MARL Override Options**

\*Override Type: \*Override Value: Effective Start Date: Effective End Date:

**MARL Results**

	Food Category	Food Subcategory	Upc	Peer Group	Cal MARL Value	Date Calculated	Std Deviation Used	% Used	New MARL Value	Effective Start Date	Effective End Date
<input type="checkbox"/>	03 - EGGS	001 - EGGS	011225086397	PHARMACY	\$5.00	02/09/2017	0	0		02/13/2017	02/13/2018
<input type="checkbox"/>	03 - EGGS	001 - EGGS	015400220156	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	041270447584	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	025444400041	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	021130032259	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	085239311578	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	015400220279	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	011110608819	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	015400220125	PHARMACY	\$50.00	02/09/2017	0	0			
<input type="checkbox"/>	03 - EGGS	001 - EGGS	011225020971	PHARMACY	\$50.00	02/09/2017	0	0			

Row count: 10 Showing 1-10 of 10


Search Preview Apply Reset

*MARL calculation Search and Overrides screen - screen after clicking the Apply button*

**Screen Behaviors and Validations**

16. Override Type and Override Value is mandatory for clicking Preview.
17. The override start and end date values supplied in the form fields and submitted, will replace any currently stored values.
18. Override Type, Override Value and Start Date is mandatory for clicking Apply.
19. Clicking the Apply button is dependent on values having been populated in the New MARL value column from clicking the Preview button.
20. Although not reflected in the mockups, the column heading text, "Calc NTE/MARL value" will be "Calc MARL value" and "New NTE/MARL value" will be "New MARL value". Resulting values in these 2 columns will have a dollar sign (\$) in front of the number.
21. The Override Type and Override Value will be saved to the database.
22. Calculated MARL and Override MARL will be saved in the database but on the screen, only one value in the Calculated MARL column will be shown. The value that will be displayed in that column will show the override MARL (if there is a value for that), otherwise, show the calculated MARL.
23. A50's will be excluded from the peer group dropdown when adding an exception or override

## 8 MASS COMMUNICATIONS

The Mass Communications page allows the user to mark that a communication has been sent to one or more Vendors. After the Mass Communication has been saved, the information can be seen in the Vendor Communication Result Grid. The user can enter a single search parameter, or a combination of parameters to narrow their search. Once a search is performed, the results are displayed within the Result Grid. The Mass Communications information can be edited from the Result Grid by clicking the  (**Edit Icon**) located next to the Communication Type. The user can also add a new Mass Communications to the HANDS system by clicking on the blue Add button. The Figure below depicts the Search page for Mass Communications.

*Navigation Path: Vendor Menu / Mass Communications or Vendor tab / Navigation / Mass Communications*

The screenshot shows the 'Mass Communications' search interface. At the top, there is a navigation bar with the user 'CTHURBER' and the system name '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH'. Below this is a menu with 'Vendor' highlighted. The main form contains several input fields: 'Communication Type' (a dropdown menu), 'Contact Date' (a text box), 'Delivery Method' (a dropdown menu), 'Certified Mail Date' (a text box), 'Certificate of Mailing Date' (a text box), and 'Green Card Date' (a text box). Below the form is a table with the following headers: 'Communication Date', 'Communication Type', 'Delivery Method', 'Certified Mail Date', 'Green Card Date', and 'Certificate of Mailing Date'. The table content is empty, displaying 'No data to show'. At the bottom left, there is a 'Row count' dropdown set to '10'. At the bottom right, there are three buttons: 'Add', 'Search', and 'New Search'.

*Figure : Mass Communications page*

*Search Fields:*

- **Communication Type** – The user can search based on the Communication Type. This field indicates the type of Communication such as Complaint Response, Missing Application Information, or Supply Request Letter.
- **Contact Date** – The user can search based on the Contact Date, which is the date of the Communication.
- **Delivery Method** – The user can search based on the Delivery Method, which is the manner in which the Communication was sent such as Certified, Certificate of Mailing, or Electronic Media.
- **Certified Mail Date** – The date that the certified mail was sent can be used to search.
- **Certificate of Mailing Date** – The date the communication was sent by certificate of mailing can be used to search.
- **Grn Card Rcpt Date** – The user can search using the date that the Green Card Receipt was returned when the Communication was sent via Certified Mail.

*Communication Grid Fields:*

- **Communication Date** – The date of the Communication. This field is display only.
- **Communication Type** – This field indicates the type of Communication such as Complaint Response, Missing Application Information, or Supply Request Letter. This field is display only.
- **Delivery Method** – The manner in which the Communication was sent such as Certified, Certificate of Mailing, or Electronic Media. This field is display only.
- **Certified Mail Date** – The date that the certified mail was sent. This field is display only.
- **Certificate of Mailing Date** – The date the communication was sent by certificate of mailing. This field is display only.
- **Grn Card Rcpt Date** – The date that the Green Card Receipt was returned when the Communication was sent via Certified Mail. This field is display only.

*Buttons:*

- **Add** – Add a new Vendor Mass Communication.
- **Search** – Click to perform a search based on the search criteria.
- **New Search** – Click to clear all search criteria fields and being a new search.

*Calculation(s):* None.

*Background Process(es):*



## 8.1 Mass Communication Add

A new Mass Communication can be recorded in the HANDS system by pressing the Add button on the Mass Communication page. There are three steps to recording a Mass Communication. The first step is to enter the Mass Communication information such as Communication Type, Contact Date, and Delivery Method. The second is to select which Vendors the Mass Communication has been sent to. The third is to confirm the selected Vendors. See the Figure below for the Mass Communication Add page for step one.

*Navigation Path: Mass Communication / Add Button*

The screenshot displays the 'Mass Communication Add' page. At the top, there is a navigation bar with the following items: CTHURBER [Log Off], 02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS HEALTH, Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor (highlighted), Program Integrity, and Reports. Below the navigation bar is a 'Back to List' button. The main form area contains several fields: '\*Communication Type' (dropdown menu with 'T - WIC ALERT' selected), '\*Contact Date' (text input with '11/01/2014'), '\*Delivery Method' (dropdown menu with '4 - CERTIFIED MAIL' selected), 'Certified Mail Date' (text input with '11/01/2014'), 'Certificate of Mailing Date' (text input), and 'Green Card Date' (text input). A 'Comment' field contains the text 'WIC Alert mail was sent to mass vendors.' Below the form is a table titled 'Vendors / Applicants' with columns for 'Vendor ID', 'Vendor Name', 'Contact Date', and 'Green Card Date'. The table currently shows 'No data to show'. At the bottom left of the table area, there is a 'Row count' dropdown set to '10'. At the bottom right of the page, there are three buttons: 'Add Vendors', 'Save', and 'Reset'.

*Figure: Mass Communication Add Communication Page*

*Fields:*

- **Communication Type** – This field indicates the type of Communication such as Complaint Response, Missing Application Information, or Supply Request Letter. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the assigned character Comm Type Code, which will also show possible completions for Communication Type. If an unknown value is entered, the message,

“Value not found” will be displayed. For more information, please refer to the Sys Admin | Vendor Base Tables for Communication Types. This field is mandatory.

- **Contact Date** – The date of the Communication. The Contact Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Contact Date. The user may also select the Contact Date using the provided Calendar which appears when the field is entered. This is a mandatory field.
- **Delivery Method** – The manner in which the Communication was sent such as Certified, Certificate of Mailing, or Electronic Media. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the assigned character Delivery Method, which will also show possible completions for Delivery Method. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | Vendor Base Tables for Delivery Types. This field is mandatory.
- **Certified Mail Date** – The date that the certified mail was sent. This field is mandatory if the Type of Mail is “Certified Mail”. Sending an item by certified mail assures that an item is sent, and it results in a green card being returned when the item is received. The Certified Mail Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Certified Mail Date. The user may also select the Certified Mail Date using the provided Calendar which appears when the field is entered. This field is mandatory if the Delivery Method selected was 4 - Certified Mail.
- **Certificate of Mailing Date** – The date the communication was sent by certificate of mailing. The certificate of mailing assures that an item is sent, but does not result in the return of a green card. The Certified Mail Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Certified Mail Date. The user may also select the Certified Mail Date using the provided Calendar which appears when the field is entered. This field is optional.
- **Grn Card Rcpt Date** – The date that the Green Card Receipt was returned when the Communication was sent via Certified Mail. The Green Card Receipt Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Green Card Receipt Date. The user may also select the Green Card Receipt Date using the provided Calendar which appears when the field is entered. This field is optional. This field is optional.
- **Comment** – The user may enter a comment about the communication. This field accepts up to 2000 alphanumeric and special characters. All comment text will be converted automatically to upper case. This field is optional.

*Vendors/Applicants Result Grid:*

- **Vendor ID** – The Vendor ID is a unique, four-digit, system-defined identification number for a Vendor. This field is display only.
- **Vendor Name** – The Vendor ID is the user-defined name for a Vendor.
- **Contact Date** – The date of the Communication. The Contact Date is entered in format MM/DD/YYYY. This field is display only.
- **Green Card Date** – The date that the Green Card Receipt was returned when the Communication was sent via Certified Mail. The Green Card Receipt Date is entered in format MM/DD/YYYY. This field is display only.

- ✎ **(Edit Icon)** – Once a record has been added, the Edit Icon will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.

#### *Edit Fields:*

- Contact Date** - - The date of the Communication. The Contact Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Contact Date. The user may also select the Contact Date using the provided Calendar which appears when the field is entered. This field is optional.
- Green Card Date** - The date that the Green Card Receipt was returned when the Communication was sent via Certified Mail. The Green Card Receipt Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Green Card Receipt Date. The user may also select the Green Card Receipt Date using the provided Calendar which appears when the field is entered. This field is optional.

#### *Buttons:*

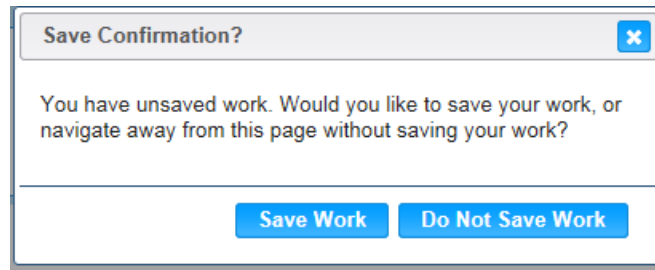
- ✕ **(Close Window)** – By clicking this button, the window is closed and no action is taken.
- OK** – Pressing the OK button closes the Edit Modal. Any changes to the Contact Date or Green Card Date now appear in the Vendors/Applicants Grid. Note: The changes are not committed to the Communication until the Save button is pressed.
- Cancel** – Click to close the Edit Modal and return to the Confirm Communication page without saving any Contact Date or Green Card Date entered.

🗑️ **(Delete Icon)** – Once a record has been added, the Delete Icon will be enabled. When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Vendor will remain in the Vendor/Applicants Grid. If Delete button is selected, the record will be removed. By clicking the ✕ **(Close Window)**, the window is closed and no action is taken.

*Note:* The record will not be permanently removed until a Save is performed.

*Buttons:*

- **Add Vendors** – This button will become active once the Communication Information has been saved. Press this button to perform the search of Vendors to whom the Communication has been sent. See section 6.2 Add Vendors.
- **Save** – Press this button to save the Mass Communication record. The Add Vendor button becomes active upon a successful Save.
- **Reset** – Press this button to undo any modifications made to the Mass Communication record since the last Save was performed.
- **Back To List** – Click to go back to the Mass Communication Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.



- **Close Window** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Mass Communication Results page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Mass Communication Result main page.

*Calculation(s):* None

*Background Processes:*

- 1) The system performs a three step save process when saving a new Vendor Communications:
  - 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

## 8.2 Mass Communication Add Vendors

The second part of adding Mass Communications is selecting the Vendors which were sent the communication. Once the Communication has been successfully saved, the Add Vendors button becomes Active. When the Add Vendors button is pressed, the user is presented with the Vendor Lookup. The user must enter in criteria to search for the appropriate Vendor. If the search results contain more than 250 Vendors, the user will be prompted to specify more search criteria to narrow the results. Once the allotted number of Vendors is returned, the Vendors will be available within the Search Result Grid. The user can select the appropriate Vendors by marking the checkbox to the left of the Applicant ID. See the Figure below for the Mass Communication Add page for step two. Once all Vendors have been selected, the user would press the Select button. The user is then brought to step 3 of this process, confirming the Selected Vendors. See Section 6.2, Mass Communications Confirm Vendors.

Navigation Path: Mass Communication / Add Button / Add Vendors

The screenshot shows a web application interface for selecting vendors. At the top, there is a navigation bar with the user name 'CTHURBER' and the system name '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. Below this is a menu with options like Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor (highlighted), Program Integrity, and Reports. A 'Return To Communication' button is located at the top left of the main content area.

The main content area contains several search filters:
 

- Vendor ID / Applicant ID: [Text Input]
- Vendor Name: [Text Input]
- Peer Group: [Dropdown Menu]
- Status: [Dropdown Menu, currently set to 'AUTHORIZ']
- SNAP Auth. Number: [Text Input]
- City: [Dropdown Menu]
- County: [Dropdown Menu, currently set to 'COCHISE, AZ']
- ZIP Code: [Text Input]
- Local Agency: [Dropdown Menu]
- Owner Name: [Text Input]
- Officer: [Dropdown Menu]
- ZIP Code From: [Text Input]
- ZIP Code Thru: [Text Input]

Below the filters is a table with the following columns: Applicant ID, Vendor ID, Vendor Name, Status, Peer Group, City, and Local Agency. The table contains 12 rows of vendor data. The first row is highlighted in blue. The next three rows are highlighted in yellow, and the last row is highlighted in blue. At the bottom right of the table are three buttons: Search, NewSearch, and Select.

<input type="checkbox"/>	Applicant ID	Vendor ID	Vendor Name	Status	Peer Group	City	Local Agency
<input type="checkbox"/>	A388	0044	UNIVERSAL MARKET	AUTHORIZED (NEW)	NATIONAL, REGIONAL, OR LOCAL CHAIN	BENSON	
<input type="checkbox"/>	A634	0075	BASIC STORE	AUTHORIZED (NEW)	COMMISSARY	SIERRA VISTA	
<input checked="" type="checkbox"/>	A433	1486	GENERAL GROCERY	AUTHORIZED (NEW)	NATIONAL, REGIONAL, OR LOCAL CHAIN	WILLCOX	
<input type="checkbox"/>	A434	1487	GRAND SUPERMARKET	AUTHORIZED (NEW)	NATIONAL, REGIONAL, OR LOCAL CHAIN	BISBEE	
<input type="checkbox"/>	A436	1691	POPULAR SUPERCENTER	AUTHORIZED (NEW)	NATIONAL, REGIONAL, OR LOCAL CHAIN	SIERRA VISTA	
<input checked="" type="checkbox"/>	A708	1964	ULTIMATE FOOD CENTER	AUTHORIZED (NEW)	SMALL RURAL INDEP (< \$750,000 GROSS SALES)	PIRTLEVILLE	
<input type="checkbox"/>	A700	2096	ALL PURPOSE PHARMACY	AUTHORIZED (NEW)	LARGE RURAL INDEP (> \$750,000 GROSS SALES)	DOUGLAS	
<input checked="" type="checkbox"/>	A043	2146	NICE FOODS INTERNATIONAL	AUTHORIZED (NEW)	SMALL RURAL INDEP (< \$750,000 GROSS SALES)	DOUGLAS	
<input checked="" type="checkbox"/>	A554	2169	BECK'S FANCY GROCERY	AUTHORIZED (NEW)	NATIONAL, REGIONAL, OR LOCAL CHAIN	SIERRA VISTA	
<input type="checkbox"/>	A555	2170	VERY NICE SUPERCENTER	AUTHORIZED (NEW)	NATIONAL, REGIONAL, OR LOCAL CHAIN	DOUGLAS	

Figure: Mass Communication Select Vendors Page

*Search Fields:*


- **Vendor ID/Applicant ID** – The user can enter the Vendor ID or the Applicant ID to search for, either value is accepted to perform the search. The Vendor ID is a unique, four-digit, user-defined identification number for a Vendor. The Applicant ID is a system generated numeric value used to uniquely identify each Applicant, consisting of four-characters that must start with a letter, followed by a three numbers. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is optional.
- **Vendor Name** – The user can search by Vendor/Applicant's name. See Background Processes for description on Wild Card searches. This field is optional.
- **Peer Group** – The user can use a search for a specific Peer Group. This field value can be selected from the drop down. This field is optional.
- **Status** – The user can search based on the current authorization status of the Vendor such as Authorized (New), Authorization in Process, or Not Approved (Denied). This field value can be selected from the drop down. This field is display only.
- **SNAP Auth. Number** – The associated SNAP Authorization Number can be used to search. This field is optional.
- **City** – The City in which the Vendor/Applicant is located can be used to search. The user can manually enter the City or select the value from the drop down. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is optional.
- **County** – The user can search by County in which the Vendor/Applicant is located. The user can manually enter the County or select the value from the drop down. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is optional.
- **ZIP Code** – The ZIP Code in which the Vendor/Applicant is located can be used to search. This field is optional.
- **Local Agency** – The organizational unit that serves as the Local Agency for the Vendor can be used to search. This value can be manually entered or selected from the drop down. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is optional. For more information, please refer to the Organizational Units in Operations Management.
- **Owner Name** – The user can enter the Corporation Name or Owner ID to search for, either value is accepted to perform the search. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is optional.
- **Officer** – The user can search for a Vendor by an associated Officer. The user can manually enter the Officer's First or Last Name or select the value from the drop down. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is optional.
- **ZIP Code From** – A range of ZIP Codes can be defined for the search. The ZIP Code From is the beginning of the range. This field is optional, however, must be specified if a ZIP Code Thru value is specified.

- **ZIP Code Thru** – A range of ZIP Codes can be defined for the search. The ZIP Code Thru is the end of the range. This field is optional, however, must be specified if a ZIP Code From value is specified.

*Search Result Grid fields:*

- **Checkbox** – This checkbox will be used to mark the selected Vendors for the Mass Communications.
- **Applicant ID** – The Applicant ID is a system generated numeric value used to uniquely identify each Applicant, consisting of four-characters that must start with a letter, followed by a three numbers. This field is display only.
- **Vendor ID** – The Vendor ID is a unique, four-digit, user-defined identification number for a Vendor. This field is display only.
- **Vendor Name** – The name of the Vendor. This field is display only.
- **Status** — The current authorization status of the Vendor such as Authorized (New), Authorization in Process, or Not Approved (Denied). This field is display only.
- **Peer Group** – The user can use a search for a specific Peer Group. Display only.
- **City** – The City in which the Vendor/Applicant is located. This field is display only.
- **Local Agency** – The organizational unit that serves as the Local Agency for the Vendor. This field is display only. For more information, please refer to the Organizational Units in Operations Management.

*Buttons:*

-  **(Edit Icon)** – Once a record has been added, the Edit Icon will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
- **Select** – This button remains deactivated until a search is performed and one or more Vendors have been selected by marking the checkbox next to the Applicant ID within the Search Result Grid. Press this button to add the selected Vendors to the Communication. Note: The user is brought back to the Mass Communication page. The Vendors are not commit assigned the Mass Communication until a save is performed on the Mass Communication page.
- **Search** – Click to perform a search with the search criteria entered.
- **New Search** – Click to clear search criteria entered and search results retrieved.
- **Back to Communication** – Press this button to return to the Mass Communication page. Any selected Vendors will not be brought to the Vendors/Applicants Result Grid.

*Calculation(s):* None

*Background Process(es):*

- 1) Search is performed for matching records based on criteria entered. Search output appears in the Result Grid.
- 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.

### 8.3 Mass Communication Confirm Vendors

The third part of adding a Mass Communications is confirming the Vendors which were sent the communication. The selected Vendors will appear in the Vendors/Applicants Result Grid. An informative message provided at the top of the screen indicates that the Save button must be pressed in order to connect the selected Vendors to the Communication. The user can select Save or Reset. Additional Vendors can then be added to the Communication. The user can also make changes to the Communication Information at this time. See the Figure below for the third step in Mass Communications. Note: Every time new Vendors are added to the communication, the Save button must be pressed to commit the Vendors to the Communication.

Navigation Path: *Mass Communication / Add Button / Communication / Add Vendors / Select*

**WARNING - Click SAVE to connect 3 Vendors to this Communication or click Reset.**

\*Communication Type: T - WIC ALERT      \*Contact Date: 11/01/2014

\*Delivery Method: 4 - CERTIFIED MAIL

Certified Mail Date: 11/01/2014      Certificate of Mailing Date: 11/01/2014      Green Card Date:

Comment: WIC ALERT MAIL WAS SENT TO MASS VENDORS.

Vendor ID	Vendor Name	Contact Date	Green Card Date
1486	GENERAL GROCERY	11/01/2014	
1487	GRAND SUPERMARKET	11/01/2014	
1964	ULTIMATE FOOD CENTER	11/01/2014	
2096	LITTLE TOWN FOODS	11/01/2014	
2169	OUTSTANDING SUPERCENTER	11/01/2014	
2203	KENNEDY FINE FOODS	11/01/2014	

Row count: 10      Showing 1-6 of 6

Add Vendors    Save    Reset

Figure : Mass Communication Confirm Vendors Page

*Communication Information Fields:*

- **Communication Type** – This field indicates the type of Communication such as Complaint Response, Missing Application Information, or Supply Request Letter. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the assigned character Comm Type Code, which will also show possible




completions for Communication Type. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | Vendor Base Tables for Communication Types. This field is mandatory.

- **Contact Date** – The date of the Communication. The Contact Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Contact Date. The user may also select the Contact Date using the provided Calendar which appears when the field is entered. This is a mandatory field.
- **Delivery Method** – The manner in which the Communication was sent such as Certified, Certificate of Mailing, or Electronic Media. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the assigned character Delivery Method, which will also show possible completions for Delivery Method. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | Vendor Base Tables for Delivery Types. This field is mandatory.
- **Certified Mail Date** – The date that the certified mail was sent. This field is mandatory if the Type of Mail is “Certified Mail”. Sending an item by certified mail assures that an item is sent, and it results in a green card being returned when the item is received. The Certified Mail Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Certified Mail Date. The user may also select the Certified Mail Date using the provided Calendar which appears when the field is entered. This field is mandatory if the Delivery Method selected was 4 - Certified Mail.
- **Certificate of Mailing Date** – The date the communication was sent by certificate of mailing. The certificate of mailing assures that an item is sent, but does not result in the return of a green card. The Certified Mail Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Certified Mail Date. The user may also select the Certified Mail Date using the provided Calendar which appears when the field is entered. This field is optional.
- **Grn Card Rcpt Date** – The date that the Green Card Receipt was returned when the Communication was sent via Certified Mail. The Green Card Receipt Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Green Card Receipt Date. The user may also select the Green Card Receipt Date using the provided Calendar which appears when the field is entered. This field is optional.
- **Comment** – The user may enter a comment about the communication. This field accepts up to 2000 alphanumeric and special characters. All comment text will be converted automatically to upper case. This field is optional.

*Vendors/Applicant Result Grid Fields:*

- **Vendor ID** – The Vendor ID is a unique, four-digit, user-defined identification number for a Vendor. This field is display only.
- **Vendor Name** – The Vendor Name is the user-defined name for a Vendor.
- **Contact Date** – The date of the Communication. The Contact Date is entered in format MM/DD/YYYY. This field is display only.


- **Green Card Date** – The date that the Green Card Receipt was returned when the Communication was sent via Certified Mail. The Green Card Receipt Date is entered in format MM/DD/YYYY. This field is display only.
-  (**Edit Icon**) – Once a record has been added, the Edit Icon will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.





#### *Edit Fields:*

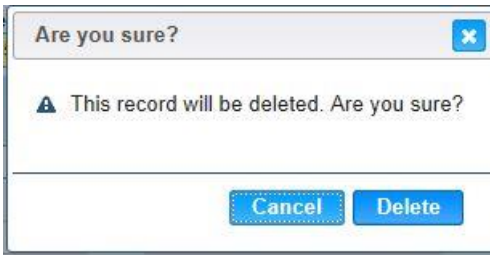
- **Contact Date** - - The date of the Communication. The Contact Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Contact Date. The user may also select the Contact Date using the provided Calendar which appears when the field is entered. This field is optional.
- **Green Card Date** - The date that the Green Card Receipt was returned when the Communication was sent via Certified Mail. The Green Card Receipt Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Green Card Receipt Date. The user may also select the Green Card Receipt Date using the provided Calendar which appears when the field is entered. This field is optional.

#### *Buttons:*

-  (**Close Window**) – By clicking this button, the window is closed and no action is taken.
- **OK** – Pressing the OK button closes the Edit Modal. Any changes to the Contact Date or Green Card Date now appear in the Vendors/Applicants Grid. Note: These changes are not committed to the Communication until the Save button is pressed.
- **Cancel** – Press this button to close the Edit Modal and return to the Confirm Communication page without saving any Contact Date or Green Card Date entered.

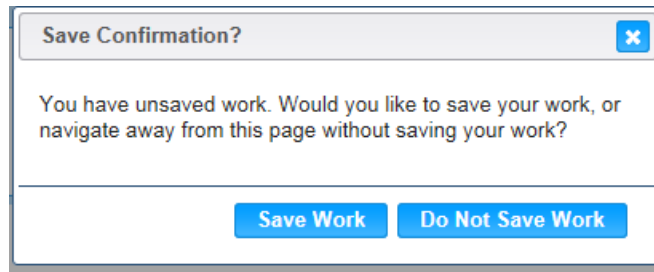
 (**Delete Icon**) – Once a record has been added, the Delete Icon will be enabled. When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Vendor will remain in the Vendor/Applicants Grid. If Delete button is selected, the record will be removed. By clicking the  (**Close Window**), the window is closed and no action is taken.


*Note:* The record will not be permanently removed until a Save is performed.



*Buttons:*

- **Add Vendors** – The user will be prompted to with the Save Confirmation if this button is pressed prior to Save or Reset. Press this button to perform the search of Vendors to whom the Communication has been sent. See section 6.2 Add Vendors.
- **Save** – Click to save the Mass Communication record. The Add Vendor button becomes active upon a successful Save.
- **Reset** – Click to undo any modifications made to the Mass Communication record since the last Save was performed.
- **Back To List** – Click to go back to the Mass Communication Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.




-  **(Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Mass Communication Results page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Mass Communication Result main page.

*Calculations:* None

*Background Process(es):*

- 1) The system performs a three step save process when saving a new Vendor Communications:
  - 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

### 8.4 Mass Communication Edit

An existing Mass Communication can be modified within the HANDS system by pressing the  (**Edit Icon**) within the Vendor Mass Communication Result Grid after a Search has been performed. The Edit Icon is located to the left of the Communication Type. See the Figure below for the Mass Vendor Communication Edit page. The Edit page functions the same as the Confirm Vendors page found above under Section 6.3.

Navigation Path: *Mass Communication Search Results | Edit Icon*

CTHURBER [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

Back to List

\*Communication Type: T - WIC ALERT \*Contact Date: 11/01/2014

\*Delivery Method: 4 - CERTIFIED MAIL

Certified Mail Date: 11/01/2014 Certificate of Mailing Date: 11/01/2014 Green Card Date:

Comment: WIC ALERT MAIL WAS SENT TO MASS VENDORS.

Vendor ID	Vendor Name	Contact Date	Green Card Date
1486	GENERAL GROCERY	11/01/2014	
1487	GRAND SUPERMARKET	11/01/2014	
1964	ULTIMATE FOOD CENTER	11/01/2014	
2096	LITTLE TOWN FOODS	11/01/2014	
2169	OUTSTANDING SUPERCENTER	11/01/2014	
2203	KENNEDY FINE FOODS	11/01/2014	

Row count: 10 Showing 1-6 of 6

Add Vendors Save Reset

Figure: Vendor Mass Communication Edit Page


Calculations: None

Background Process(es):

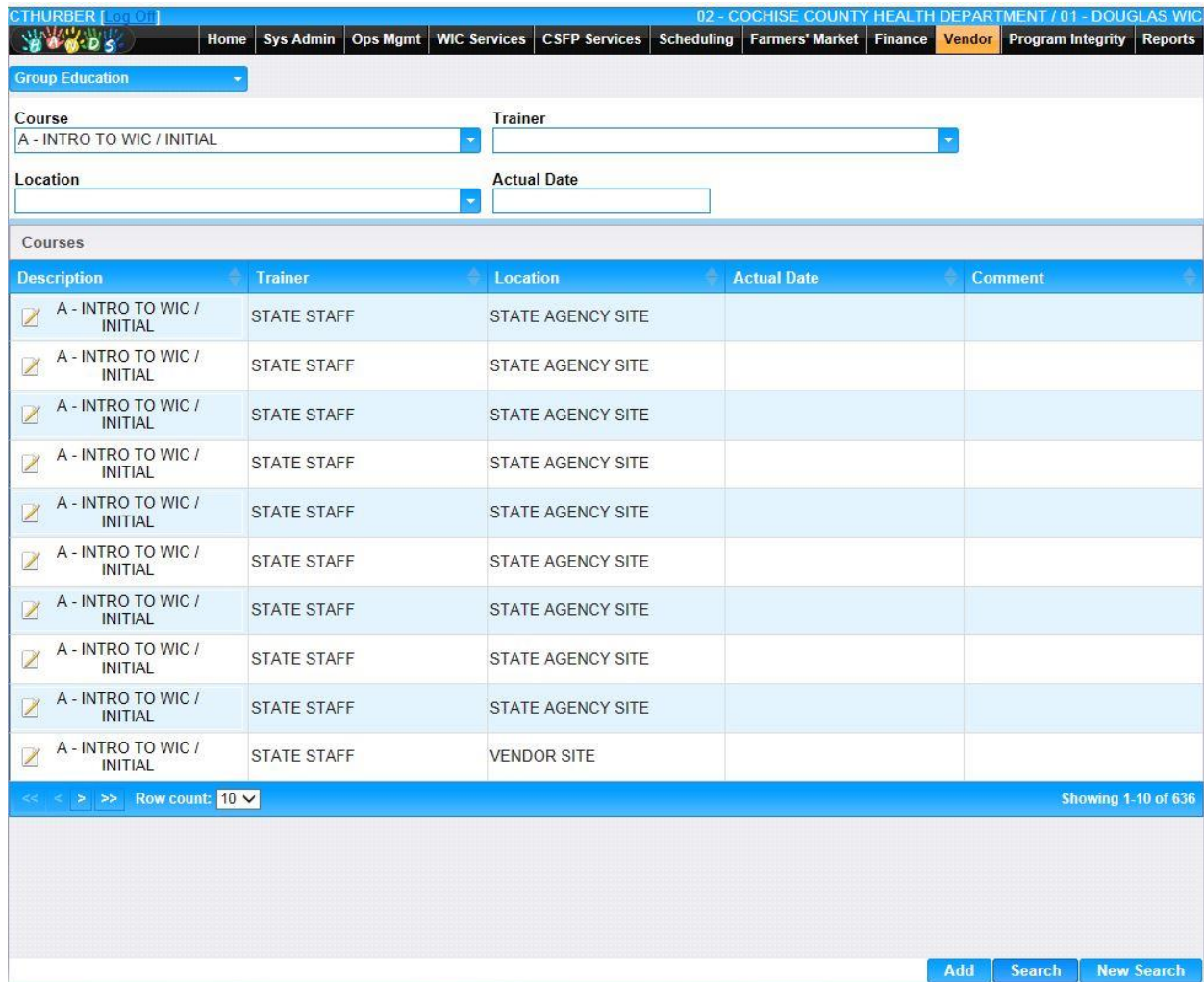
- 1) The system performs a three step save process when saving a new Vendor Communications:
  - a) First, it ensures all mandatory fields are populated with data. If not the save process will stop and an error message will be thrown.

- 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

## 9 GROUP EDUCATION

The Group Education page allows the user to mark that a communication has been sent for multiple Vendors. After the Group Education has been successfully saved, the information can be seen in the Vendor Communication Result Grid. The user can enter a single search parameter, or a combination of parameters to narrow their search. Once a search is performed, the results are displayed within the Result Grid. The desired Group Education information can be edited from the Result Grid by clicking the  (**Edit Icon**) which is located next to the Description. The user can also add a new Group Education to the HANDS system by clicking on the blue Add button. The Figure below depicts the Search page for Group Education. The information is also available within the Vendor record, under the Education page.

*Navigation Path: Vendor Menu / Group Education or Vendor tab / Navigation / Group Education*













The screenshot displays the Group Education page. At the top, there is a navigation bar with the user name 'CTHURBER' and the system name '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. Below this is a menu with options: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. The 'Vendor' menu item is highlighted.

The main content area is titled 'Group Education' and contains a search form with the following fields:

- Course:** A dropdown menu with 'A - INTRO TO WIC / INITIAL' selected.
- Trainer:** An empty dropdown menu.
- Location:** An empty dropdown menu.
- Actual Date:** An empty text input field.

Below the search form is a table titled 'Courses' with the following columns: Description, Trainer, Location, Actual Date, and Comment. The table contains 10 rows of data:

Description	Trainer	Location	Actual Date	Comment
 A - INTRO TO WIC / INITIAL	STATE STAFF	STATE AGENCY SITE		
 A - INTRO TO WIC / INITIAL	STATE STAFF	STATE AGENCY SITE		
 A - INTRO TO WIC / INITIAL	STATE STAFF	STATE AGENCY SITE		
 A - INTRO TO WIC / INITIAL	STATE STAFF	STATE AGENCY SITE		
 A - INTRO TO WIC / INITIAL	STATE STAFF	STATE AGENCY SITE		
 A - INTRO TO WIC / INITIAL	STATE STAFF	STATE AGENCY SITE		
 A - INTRO TO WIC / INITIAL	STATE STAFF	STATE AGENCY SITE		
 A - INTRO TO WIC / INITIAL	STATE STAFF	STATE AGENCY SITE		
 A - INTRO TO WIC / INITIAL	STATE STAFF	STATE AGENCY SITE		
 A - INTRO TO WIC / INITIAL	STATE STAFF	VENDOR SITE		


At the bottom of the table, there is a pagination bar showing 'Row count: 10' and 'Showing 1-10 of 636'. Below the table are three buttons: 'Add', 'Search', and 'New Search'.

**Figure : Group Education Page**

*Search Fields:*

- **Course** – The user can search for an existing Group Education using the type of Course such as Intro to WIC, High Volume Training, or Annual Training Alert. This field is optional.
- **Trainer** – The person who performed the training can be used to search, such as State Staff or Contractor Staff. This field is optional.
- **Location** – The user can search for the site where the training was performed such as Vendor Site, State Agency Site, or Video Conferencing Site. This field is optional.
- **Actual Date** – The user can search for the date the education was provided. This field is optional.

#### *Courses Result Grid:*

-  **(Edit Icon)** – When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
- **Description** – This field indicates the type of Course such as Intro to WIC, High Volume Training, or Annual Training Alert. Display only.
- **Trainer** – The person who performed the training, such as State Staff or Contractor Staff. Display only.
- **Location** – The site where the training was performed such as Vendor Site, State Agency Site, or Video Conferencing Site. Display only.
- **Actual Date** – The date the education was provided. Display only.
- **Comment** – Any comment that was added for the Group Education. Display only.

#### *Buttons:*

- **Add** – Press this button to add a new Group Education to the HANDS system.
- **Search** – Press this button to perform a search with the search criteria entered.
- **New Search** – Press this button to clear search criteria entered and search results retrieved.

*Calculation(s):* None

#### *Background Process(es):*

- 1) Search is performed for matching records based on criteria entered. Search output appears in the Result Grid.
- 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.

## 9.1 Group Education Add

A new Group Education can be recorded within the HANDS system by pressing the Add button on the Group Education page. There are three steps involved when marking a Group Education. The first is to configure the system with the Group Education information such as Course,

Trainer, and Location. The second is to select which Vendors the Group Education has been assigned to. The third is to confirm the selected Vendors. See the Figure below for the Group Education Add page for step one.

Navigation Path: Group Education | Add Button

The screenshot displays the 'Group Education Add Communication Page' in a web browser. At the top, there is a navigation bar with tabs: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor (highlighted), Program Integrity, and Reports. Below the navigation bar is a 'Back to List' button. A yellow banner at the top of the form area says 'Record saved successfully'. The form contains the following fields:

- \*Course:** A dropdown menu with 'H - HIGH VOLUME TRAINING' selected.
- \*Trainer:** A dropdown menu with 'A - STATE STAFF' selected.
- \*Location:** A dropdown menu with '3 - VIDEO CONFERENCING SITE' selected.
- Actual Date:** A text input field containing '01/16/2015'.
- Comment:** A text area containing 'HIGH VOLUME TRAINING'.

Below the form is a section titled 'Vendors / Applicants' which contains a table with the following columns: Vendor ID, Vendor Name, Actual Attendance, Test Score, Test Date, and Comment. The table is currently empty, displaying 'No data to show'. Below the table is a 'Row count' dropdown set to '10'. At the bottom right of the page are three buttons: 'Add Vendors', 'Save', and 'Reset'.

Figure : Group Education Add Communication Page

**Fields:**

- Course** – This field indicates the type of Course such as Intro to WIC, High Volume Training, or Annual Training Alert. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the assigned character Ed Course Code, which will also show possible completions for Education Type. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | Vendor Base Tables for Education Courses. This field is mandatory.
- Trainer** – The person who performed the training, such as State Staff or Contractor Staff. The appropriate value can be manually entered or selected from the drop down by

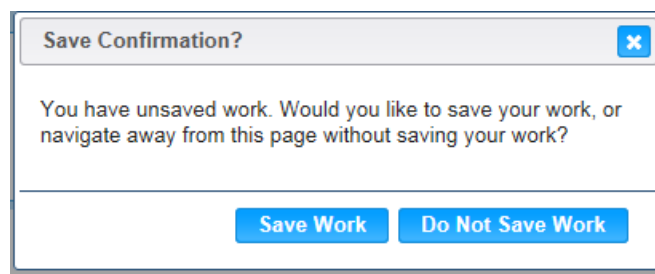


clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the assigned character Ed Trainer, which will also show possible completions for Education Trainers. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | Vendor Base Tables for Education Trainers. This field is mandatory.

- **Location** – The site where the training was performed such as Vendor Site, State Agency Site, or Video Conferencing Site. The appropriate value can be manually entered or selected from the drop down by clicking on the down arrow at the right of the field and scrolling through the list. Alternatively, the user can enter the assigned character Ed Location, which will also show possible completions for Education Locations. If an unknown value is entered, the message, “Value not found” will be displayed. For more information, please refer to the Sys Admin | Vendor Base Tables for Education Locations. This field is mandatory.
- **Actual Date** – The date the education was provided. The Actual Date is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Actual Date. The user may also select the Actual Date using the provided Calendar which appears when the field is entered. This is a mandatory field.
- **Comment** – The user may enter a comment about the communication. This field accepts up to 2000 alphanumeric and special characters. All comment text will be converted automatically to upper case. This field is optional.

#### *Buttons:*

- **Add Vendors** – This button will become active once the Group Education Information has been saved. Press this button to perform the search of Vendors to whom the Group Education was assigned. See section 7.2 Add Vendors.
- **Save** – Press this button to save the Group Education record. The Add Vendor button becomes active upon a successful Save.
- **Reset** – Press this button to undo any modifications made to the Group Education record since the last Save was performed.
- **Back To List** – Press this button to go back to the Group Education Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.



- **X (Close Window)** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Group Education Results page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Group Education Result main page.

*Calculation(s):* None

*Background Processes:*

- 1) The system performs a three step save process when saving a new Vendor Group Education:
  - 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.
  
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

## 9.2 Group Education Add Vendors

The second part of adding Group Education is selecting the Vendors which assigned the Education. Once the Education has been successfully saved, the Add Vendors button becomes Active. When the Add Vendors button is pressed, the user is presented with the Vendor Lookup. The user must enter in criteria to search for the appropriate Vendor. If the search results contain more than 250 Vendors, the user will be prompted to specify more search criteria to narrow the results. Once the allotted number of Vendors is returned, the Vendors will be available within the Search Result Grid. The user can select the appropriate Vendors by marking the checkbox to the left of the Applicant ID. See the Figure below for the Group Education Add page for step two. Once all Vendors have been selected, the user would press the Select button. The user is then brought to step 3 of this process, confirming the Selected Vendors. See Section 7.3, Group Education Confirm Vendors.

*Navigation Path: Group Education / Add Button / Add Vendors*

Applicant ID	Vendor ID	Vendor Name	Status	Peer Group	City	Local Agency
<input type="checkbox"/> A388	0044	UNIVERSAL MARKET	AUTHORIZED (NEW)	NATIONAL, REGIONAL, OR LOCAL CHAIN	BENSON	
<input type="checkbox"/> A634	0075	BASIC STORE	AUTHORIZED (NEW)	COMMISSARY	SIERRA VISTA	
<input checked="" type="checkbox"/> A433	1486	GENERAL GROCERY	AUTHORIZED (NEW)	NATIONAL, REGIONAL, OR LOCAL CHAIN	WILLCOX	
<input type="checkbox"/> A434	1487	GRAND SUPERMARKET	AUTHORIZED (NEW)	NATIONAL, REGIONAL, OR LOCAL CHAIN	BISBEE	
<input type="checkbox"/> A436	1691	POPULAR SUPERCENTER	AUTHORIZED (NEW)	NATIONAL, REGIONAL, OR LOCAL CHAIN	SIERRA VISTA	
<input checked="" type="checkbox"/> A708	1964	ULTIMATE FOOD CENTER	AUTHORIZED (NEW)	SMALL RURAL INDEP (< \$750,000 GROSS SALES)	PIRTLEVILLE	
<input checked="" type="checkbox"/> A700	2096	ALL PURPOSE PHARMACY	AUTHORIZED (NEW)	LARGE RURAL INDEP (> \$750,000 GROSS SALES)	DOUGLAS	
				SMALL		


*Figure: Group Education Select Vendors Page*

*Search Fields:*

- **Vendor ID/Applicant ID** – The user can enter the Vendor ID or the Applicant ID to search for, either value is accepted to perform the search. The Vendor ID is a unique, four-digit, user-defined identification number for a Vendor. The Applicant ID is a system generated numeric value used to uniquely identify each Applicant, consisting of four characters that must start with a letter, followed by a three numbers. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is optional.
- **Vendor Name** – The user can search by Vendor/Applicant's name. See Background Processes for description on Wild Card searches. This field is optional.
- **Peer Group** – The user can use a search for a specific Peer Group. Examples of Peer Groups are Pharmacy, Large Rural Independent, and National, Regional, or Local Chain. This field value can be selected from the drop down. This field is optional.
- **Status** – The user can search based on the current authorization status of the Vendor such as Authorized (New), Authorization in Process, or Not Approved (Denied). This field value can be selected from the drop down. This field is display only.
- **SNAP Auth. Number** – The associated SNAP Authorization Number can be used to search. This field is optional.
- **City** – The City in which the Vendor/Applicant is located can be used to search. The user can manually enter the City or select the value from the drop down. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is optional.
- **County** – The user can search by County in which the Vendor/Applicant is located. The user can manually enter the County or select the value from the drop down. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is optional.
- **ZIP Code** – The ZIP Code in which the Vendor/Applicant is located can be used to search. This field is optional.
- **Local Agency** – The organizational unit that serves as the Local Agency for the Vendor can be used to search. This value can be manually entered or selected from the drop down. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is optional. For more information, please refer to the Organizational Units in Operations Management.
- **Owner Name** – The user can enter the Corporation Name or Owner ID (a system generated numeric value used to uniquely identify each Owner) to search for, either value is accepted to perform the search. Possible field values will be available for selection within the drop down as characters are entered into the field. The user can also select a value directly from the drop down by clicking on the arrow at the right of the field and scrolling through the list. This field is optional.
- **Officer** – The user can search for a Vendor by an associated Officer. The user can manually enter the Officer's First or Last Name or select the value from the drop down. Possible field values will be available for selection within the drop down as characters are entered into the field. This field is optional.
- **ZIP Code From** – A range of ZIP Codes can be defined for the search. The ZIP Code From is the beginning of the range. This field is optional, however, must be specified if a ZIP Code Thru value is specified.

- **ZIP Code Thru** – A range of ZIP Codes can be defined for the search. The ZIP Code Thru is the end of the range. This field is optional, however, must be specified if a ZIP Code From value is specified.

*Search Result Grid fields:*

- **Checkbox** – This checkbox will be used to mark the selected Vendors for the Mass Communications.
- **Applicant ID** – The Applicant ID is a system generated numeric value used to uniquely identify each Applicant, consisting of four-characters that must start with a letter, followed by a three numbers. This field is display only.
- **Vendor ID** – The Vendor ID is a unique, four-digit, user-defined identification number for a Vendor. This field is display only.
- **Vendor Name** – The name of the Vendor. This field is display only.
-  **(Edit Icon)** – Once a record has been added, the Edit Icon will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.
- **Status** — The current authorization status of the Vendor such as Authorized (New), Authorization in Process, or Not Approved (Denied). This field is display only.
- **Peer Group** – The user can use a search for a specific Peer Group. Examples of Peer Groups are Pharmacy, Large Rural Independent, and National, Regional, or Local Chain. This field is display only.
- **City** – The City in which the Vendor/Applicant is located. This field is display only.
- **Local Agency** – The organizational unit that serves as the Local Agency for the Vendor. This field is display only. For more information, please refer to the Organizational Units in Operations Management.

*Buttons:*

- **Select** – This button remains deactivated until a search is performed and one or more Vendors have been selected by marking the checkbox next to the Applicant ID within the Search Result Grid. Press this button to add the selected Vendors to the Group Education. Note: The user is brought back to the Group Education page. The Vendors are not commit assigned the Group Education until a save is performed on the Group Education page.
- **Search** – Press this button to perform a search with the search criteria entered.
- **New Search** – Press this button to clear search criteria entered and search results retrieved.
- **Back to Education** – Press this button to return to the Group Education page. Any selected Vendors will not be brought to the Vendors/Applicants Result Grid.

*Calculation(s):* None

*Background Process(es):*

- 1) Search is performed for matching records based on criteria entered. Search output appears in the Result Grid.

- 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.

### 9.3 Group Education Confirm Vendors

The third part of adding Group Educations is confirming the Vendors which were assigned the Education. At this point, the Group Education information has been saved. The appropriate Vendors have been selected via the Add Vendors button. However, these Vendors have not been committed to the Group Education. The user is brought back to the Mass Communication page. The selected Vendors will appear in the Vendors/Applicants Result Grid. There is an Informative message provided at the top of the screen which indicates that the Save button must be pressed in order to connect the selected Vendors to the Group Education. The user can select Save or Reset. Additional Vendors can then be added to the Group Education. The user can also make changes to the Group Education Information at this time. See the Figure below for the third step in Group Education. Note: Every time new Vendors are added to the education, the Save button must be pressed to commit the Vendors to the Education.

Navigation Path: Group Education / Add Button / Education / Add Vendors / Select

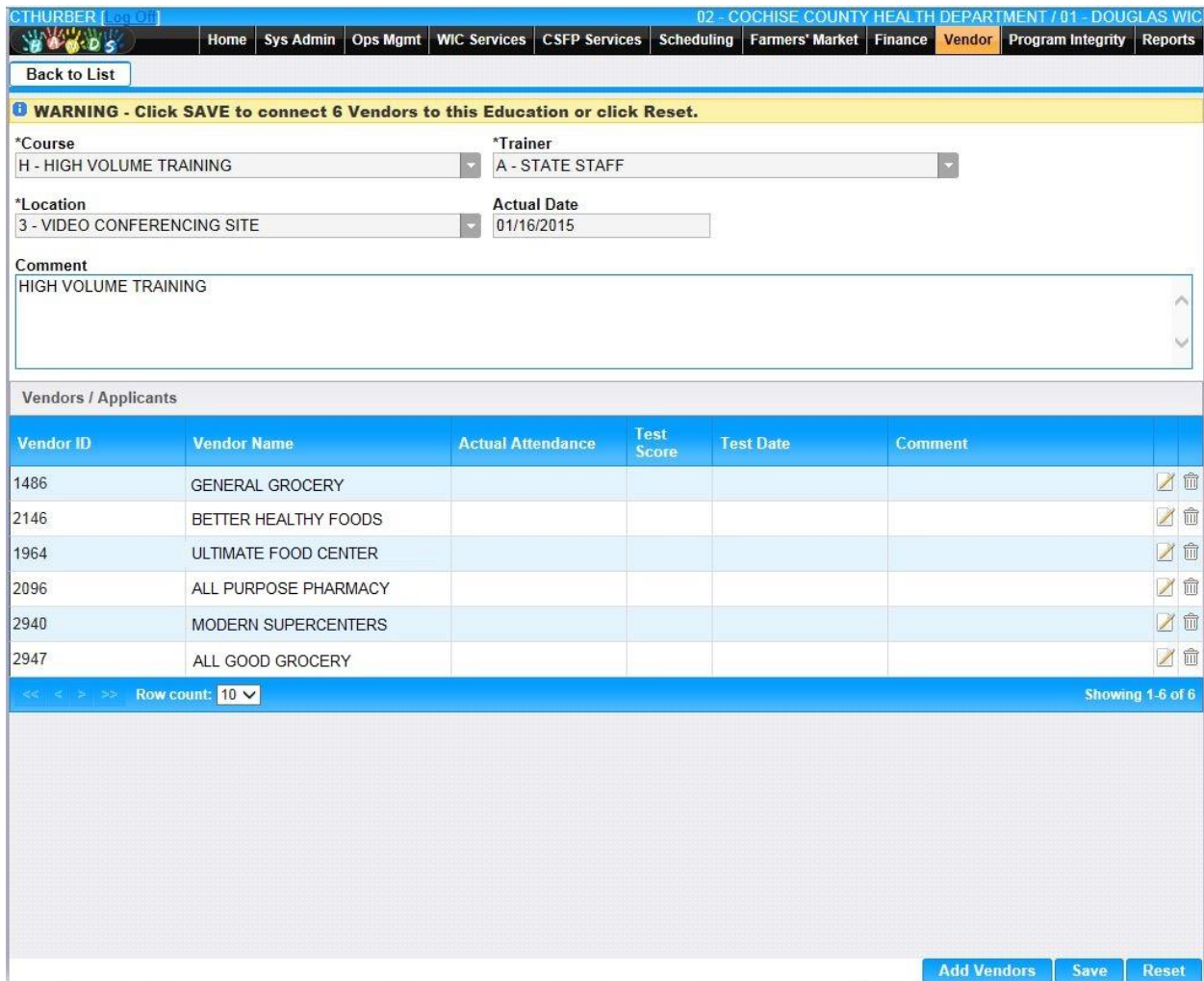



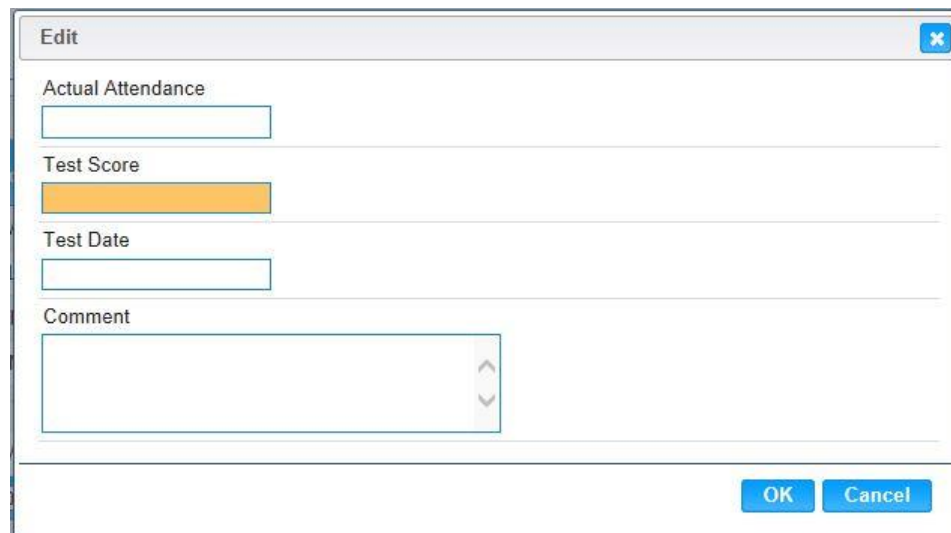
Figure : Group Education Confirm Vendors Page

Group Education Information Fields:

- **Course** – This field indicates the type of Course such as Intro to WIC, High Volume Training, or Annual Training Alert. This field is display only.
- **Trainer** – The person who performed the training, such as State Staff or Contractor Staff. This field is display only.
- **Location** – The site where the training was performed such as Vendor Site, State Agency Site, or Video Conferencing Site. This field is display only.
- **Actual Date** – The date the education was provided. This field is display only.
- **Comment** – The user may enter a comment about the communication. This field accepts up to 2000 alphanumeric and special characters. All comment text will be converted automatically to upper case. This field is optional.

*Vendors/Applicant Result Grid Fields:*

- **Vendor ID** – The Vendor ID is a unique, four-digit, user-defined identification number for a Vendor. This field is display only.
- **Vendor Name** – The Vendor ID is the user-defined name for a Vendor. This field is display only.
- **Actual Attendance** – The number of individuals scheduled to attend the course. This field is display only.
- **Test Score** – The score that the attendees received. This field must be a numeric value between 0 and 999. This field is display only.
- **Date of Test Score** – The date the test was given. The Date of Test Score is entered in format MM/DD/YYYY. This field is display only.
- **Comment** – The user may enter a comment about the education. This field is display only.
-  **(Edit Icon)** – Once a record has been added, the Edit Icon will be enabled. When selected, navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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

- Actual Attendance:** A text input field.
- Test Score:** A text input field with an orange background.
- Test Date:** A text input field.
- Comment:** A text area with a scroll bar.




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

*Edit Fields:*

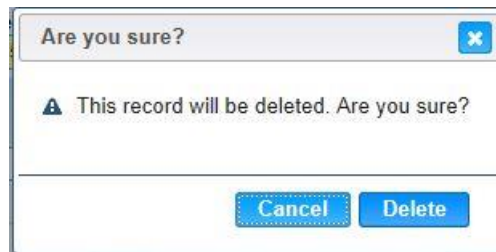


- **Actual Attendance** – The number of individuals scheduled to attend the course. This field must be a numeric value. This field is optional.
- **Test Score** – The score that the attendees received. This field must be a numeric value between 0 and 999. This field is optional.
- **Date of Test Score** – The date the test was given. The Date of Test Score is entered in format MM/DD/YYYY. The user does not need to enter the forward slash (/) character when manually entering the Date of Test Score. The user may also select the Date of Test Score using the provided Calendar which appears when the field is entered. This field is optional.
- **Comment** – The user may enter a comment about the education. This field accepts up to 2000 alphanumeric and special characters. All comment text will be converted automatically to upper case. This field is optional.

*Buttons:*

-  (**Close Window**) – By clicking this button, the window is closed and no action is taken.
- **OK** – Pressing the OK button closes the Edit Modal. Any changes to the Group Education information now appear in the Vendors/Applicants Grid. Note: These changes are not committed to the Group Education until the Save button is pressed.
- **Cancel** – Press this button to close the Edit Modal and return to the Confirm Group Education page without saving any Group Education edits entered.
-  (**Delete Icon**) – Once a record has been added, the Delete Icon will be enabled. When selected, the user will be prompted to confirm the deletion. If the Cancel button is selected, the Vendor will remain in the Vendor/Applicants Grid. If Delete button is selected, the record will be removed. By clicking the  (**Close Window**), the window is closed and no action is taken.

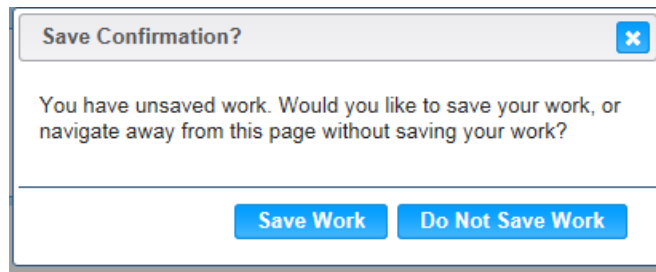
*Note:* The record will not be permanently removed until a Save is performed.



*Buttons:*

- **Add Vendors** – The user will be prompted to with the Save Confirmation if this button is pressed prior to Save or Reset. Press this button to perform the search of Vendors to whom the Group Education has been sent. See section 6.2 Add Vendors.
- **Save** – Press this button to save the Group Education record. The Add Vendor button becomes active upon a successful Save.
- **Reset** – Press this button to undo any modifications made to the Group Education record since the last Save was performed.

- **Back To List** – Press this button to go back to the Group Education Search Results page with previous results. If there is unsaved work the Save Confirmation notification appears.




- **Close Window** – The window is closed and no action is taken.
- **Save Work** – The new record is saved and focus switches to the Group Education Results page.
- **Do Not Save Work** – The modifications are cleared and focus returns to the Group Education Result main page.

*Calculations:* None

*Background Process(es):*

- 1) The system performs a three step save process when saving a new Vendor Group Education:
  - 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

### 9.4 Group Education Edit

An existing Group Education can be modified within the HANDS system by pressing the  (**Edit Icon**) within the Vendor Group Education Result Grid after a Search has been performed. The Edit Icon is located to the left of the Description. See the Figure below for the Mass Vendor Communication Edit page. The Edit page functions the same as the Confirm Vendors page found above under Section 7.3.

Navigation Path: Group Education Search Results | Edit Icon

CTHURBER [Log Out] 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

Back to List

\*Course: I - SPECIAL TRAINING EVENT \*Trainer: C - OTHER / SPECIAL SPEAKER

\*Location: 1 - VENDOR SITE Actual Date: 01/23/2015

Comment: SPECIAL TRAINING FOR SELECTED VENDORS

Vendor ID	Vendor Name	Actual Attendance	Test Score	Test Date	Comment
1486	GENERAL GROCERY				
1964	BETTER HEALTHY FOODS				
2096	ULTIMATE FOOD CENTER				
2629	ALL PURPOSE PHARMACY				
2940	MODERN SUPERCENTERS				
2951	ALL GOOD GROCERY				

Row count: 10 Showing 1-6 of 6

Add Vendors Save Reset

Figure Vendor Group Education Edit Page

Calculation(s): None

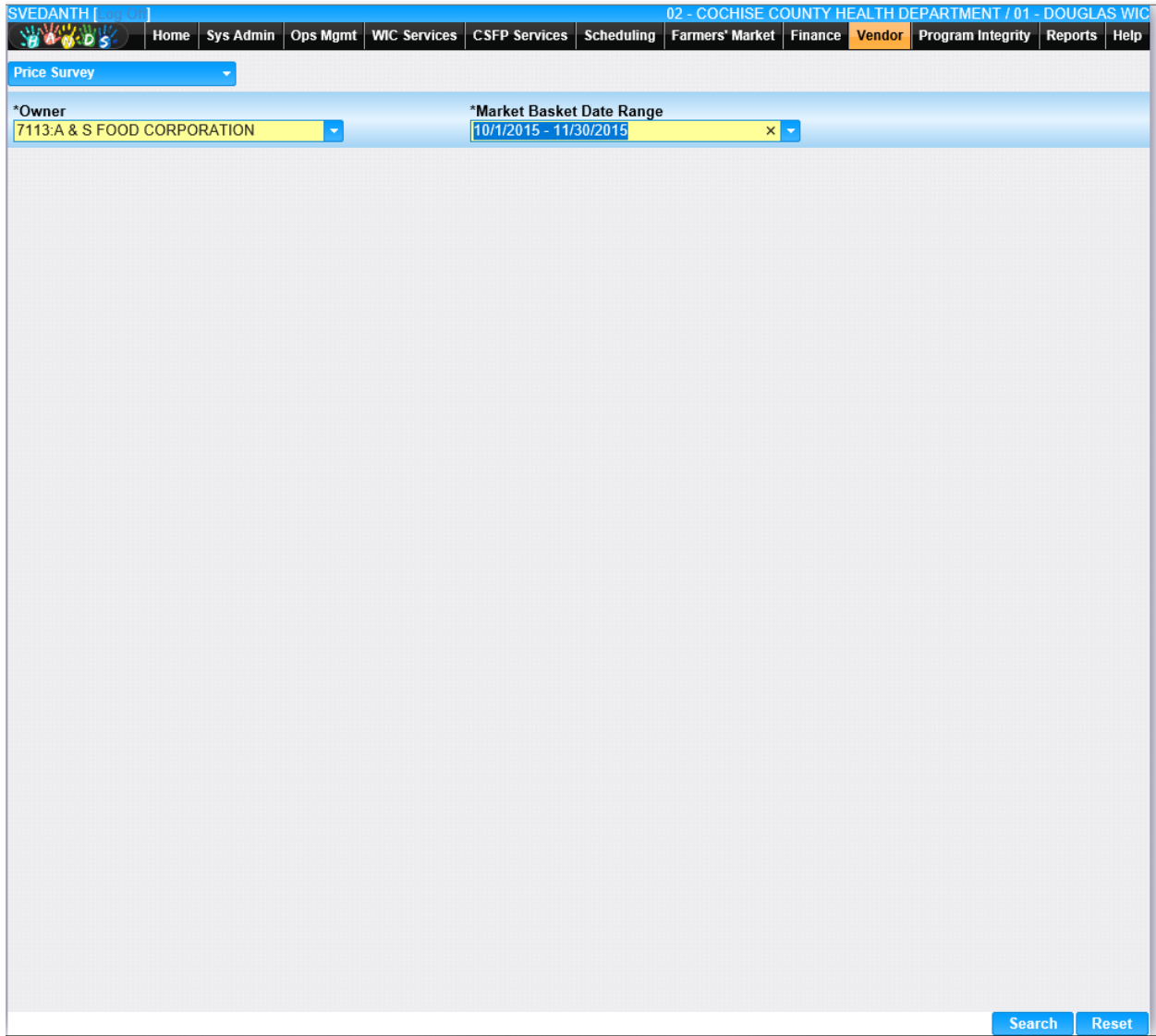
Background Processes:

- 1) The system performs a three step save process when saving a new Vendor Group Education:
  - 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.
- 2) When the Save button is selected, the message “Record saved successfully” appears at the top of the screen to indicate that the saved without error. This message slowly fades after a few seconds.

## 10 PRICE SURVEY

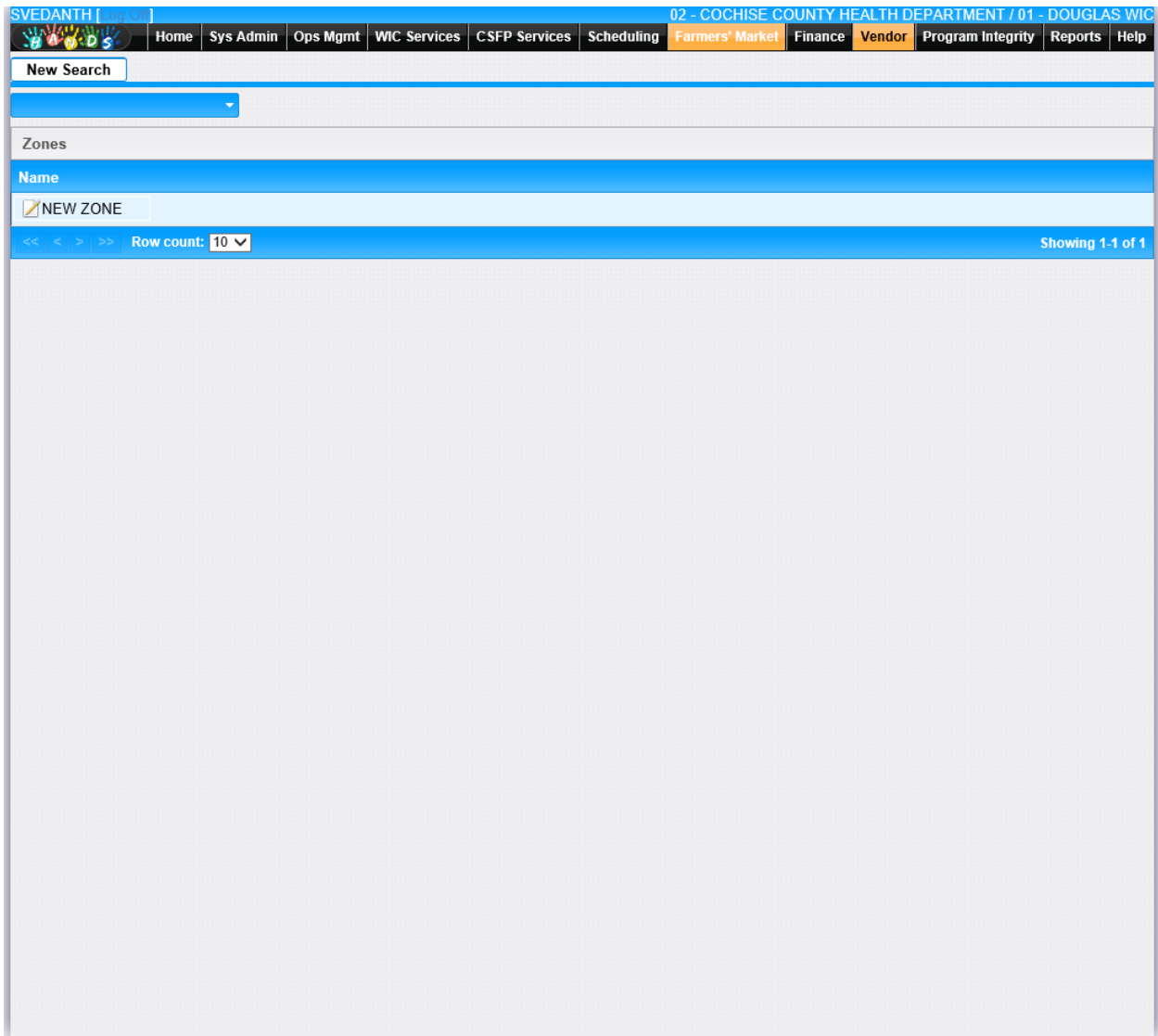
This screen allows user to search available vendor IDs based on owner and Market basket Date range.



*Figure Price survey search screen*

SVEDANTH [ ... ] 02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC										
<a href="#">Home</a> <a href="#">Sys Admin</a> <a href="#">Ops Mgmt</a> <a href="#">WIC Services</a> <a href="#">CSFP Services</a> <a href="#">Scheduling</a> <a href="#">Farmers' Market</a> <a href="#">Finance</a> <a href="#">Vendor</a> <a href="#">Program Integrity</a> <a href="#">Reports</a> <a href="#">Help</a>										
New Search										
Vendor IDs										
Applicant ID	Vendor ID	Vendor Name	Status	Peer Group	Owner	SNAP Auth Number	City	ZIP Code	County	Group
V407	0023	<input checked="" type="checkbox"/> NEW VENDOR	AUTHORIZED (NEW)	FARMERS	A & S CACTUS EXPRESS INC.		PHOENIX	85002	MARICOPA	
A797	2696	<input checked="" type="checkbox"/> A & S CACTUS EXPRESS	TERMINATED/DISQUALIFIED	SMALL URBAN INDEP (< \$750,000 GROSS SALES)	A & S CACTUS EXPRESS INC.	107588	PHOENIX	85029	MARICOPA	
VT99		<input checked="" type="checkbox"/> SAMPLE STORE	NOT APPROVED (DENIED)	SMALL RURAL INDEP (< \$750,000 GROSS SALES)	A & S CACTUS EXPRESS INC.	13255	PHOENIX	85007	MARICOPA	

*Figure list of Vendor Ids based on search criteria*



*Figure Zones list*

SVEDANTH | 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 Help

Back to List

Item ID	Brand / Variety	Size	Actual Size	Item Price
<b>Food Description</b> MILK	<b>Description</b> WHOLE	<b>Size</b> GAL	<b>Actual Size</b> 1	<b>Item Price</b> \$3.49
<b>Food Description</b> MILK	<b>Description</b> 2%	<b>Size</b> GAL	<b>Actual Size</b> 1	<b>Item Price</b> \$3.49
<b>Food Description</b> CHEESE	<b>Description</b> CHEDDAR	<b>Size</b> LB	<b>Actual Size</b> 1	<b>Item Price</b> \$6.29
<b>Food Description</b> CHEESE	<b>Description</b> MONTEREY JACK	<b>Size</b> LB	<b>Actual Size</b> 1	<b>Item Price</b> \$6.29
<b>Food Description</b> JUICE	<b>Description</b> TREE TOP (APPLE)	<b>Size</b> OZ	<b>Actual Size</b> 64	<b>Item Price</b> \$2.99
<b>Food Description</b> JUICE FROZEN	<b>Description</b> ANY FROZEN ORANGE	<b>Size</b> OZ	<b>Actual Size</b> 11.5	<b>Item Price</b> \$1.49
<b>Food Description</b> CEREAL	<b>Description</b> CHEERIOS (PLAIN)	<b>Size</b> OZ	<b>Actual Size</b> 14	<b>Item Price</b> \$3.99
<b>Food Description</b> CEREAL	<b>Description</b> KIX (PLAIN)	<b>Size</b> OZ	<b>Actual Size</b> 14	<b>Item Price</b> \$3.99
<b>Food Description</b> PEANUT BUTTER	<b>Description</b> ANY BRAND PLAIN/CRE	<b>Size</b> OZ	<b>Actual Size</b> 18	<b>Item Price</b> \$3.49
<b>Food Description</b> TUNA	<b>Description</b> ANY BRAND WATER-P/	<b>Size</b> OZ	<b>Actual Size</b> 5	<b>Item Price</b> \$1.39
<b>Food Description</b> BABY FOOD	<b>Description</b> GERBER (ANY VEGETA	<b>Size</b> OZ	<b>Actual Size</b> 4	<b>Item Price</b> \$0.99
<b>Food Description</b> INFANT FORMULA	<b>Description</b> SIMILAC ADVANCE W/II	<b>Size</b> OZ	<b>Actual Size</b> 12.9	<b>Item Price</b> \$15.49
<b>Food Description</b> EGGS	<b>Description</b> LARGE, WHITE, CHICKI	<b>Size</b> CDOZ	<b>Actual Size</b> 1	<b>Item Price</b> \$1.89

Reset

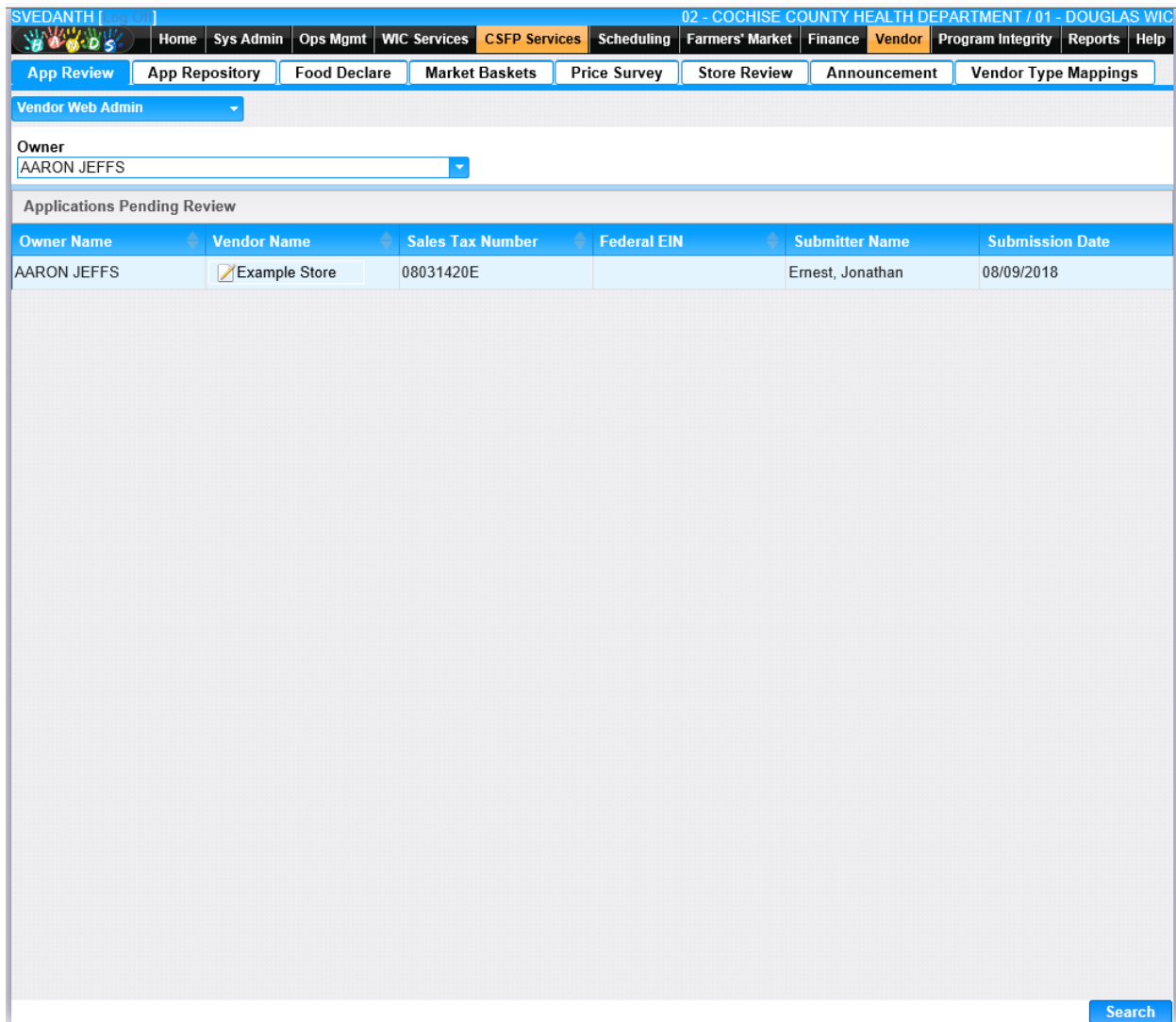


## 11 VENDOR WEB ADMIN:

### 11.1 APP Review

Navigation path – Vendor web admin-> App Review

Allows the user to review new applications and updated applications. User selects the owner from the drop down and clicks on search button. List of pending applications will be displayed in the grid. User clicks on a vendor name to transfer or reject the application.



The screenshot displays the Vendor Web Admin interface. At the top, there is a navigation menu with options: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, Reports, and Help. Below this is a sub-menu with options: App Review, App Repository, Food Declare, Market Baskets, Price Survey, Store Review, Announcement, and Vendor Type Mappings. The main content area is titled 'Vendor Web Admin' and features a dropdown menu for 'Owner' currently set to 'AARON JEFFS'. Below this is a section titled 'Applications Pending Review' containing a table with the following data:

Owner Name	Vendor Name	Sales Tax Number	Federal EIN	Submitter Name	Submission Date
AARON JEFFS	Example Store	08031420E		Ernest, Jonathan	08/09/2018

A 'Search' button is located at the bottom right of the interface.

*Figure: List of pending applications for review*

The screenshot shows a web application interface for the Arizona WIC Program. At the top, there is a navigation bar with tabs for Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, Reports, and Help. Below the navigation bar is a 'Back to List' button. The main content area contains several input fields and buttons:

- \*Approve Action:** A dropdown menu with 'Associate to: AARON JEFFS' selected.
- Owner Name:** Text input field containing 'AARON JEFFS'.
- Vendor Name:** Text input field containing 'Example Store'.
- Submitter Name:** Text input field containing 'ERNEST, JONATHAN'.
- Submitter Title:** Text input field containing 'Owner'.
- Submission Date:** Text input field containing '08/09/2018'.
- Sales Tax Number:** Text input field containing '08031420E'.
- Federal EIN:** Text input field.
- Buttons:** Two blue buttons labeled 'Transfer' and 'Reject'.

Below the input fields, there is a toolbar with icons for file operations (upload, download, zoom in, zoom out, print) and a section for 'RETAIL:' and 'PHARMACY:' with 'Yes' and 'No' checkboxes. The main heading reads 'ARIZONA WIC PROGRAM VENDOR APPLICATION'. Below this, a message states: 'PLEASE ANSWER ALL QUESTIONS AND INCOMPLETE APPLICATIONS WILL NOT BE PROCESSED. Submission of this application does not constitute authorization to participate in the Arizona WIC Program. This application is NOT a Contract. Participation in the Arizona WIC Program will not be authorized until all completed application materials have been received, evaluated and approved.'

The section is titled 'Part I - Owner' and lists the following information:

- Owner: AARON JEFFS
- Business Address: 385 W TOWNSHIP AVE, COLORADO CITY, AZ 86021 County: MOHAVE
- Phone: (435) 874-1074
- Fax:
- Cell:
- Mailing Address: P.O. BOX 1725

*Figure: Options to Transfer or Reject the application*

## 11.2 App Repository:

Navigation path – Vendor web admin-> App Repository

Allows the user to review archived applications. Page allows user to search for an archived application and view that application (as PDF).

SVEDANTH [ 00 - BUREAU OF NUTRITION AND PHYSICAL ACTIVITY / 00 - ALL CLINICS

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

App Review App Repository Food Declare Market Baskets Price Survey Store Review Announcement Vendor Type Mappings

Vendor Web Admin

Owner  
AARON WILLIS

Archived Application Search Results

Owner Name	Vendor Name	Sales Tax Number	Federal EIN	Submitter Name	Submission Date
AARON WILLIS	test	899898	899898	test, ts	08/09/2018

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

Search

Figure: List of Archived applications

SVEDANTH [ ] 00 - BUREAU OF NUTRITION AND PHYSICAL ACTIVITY / 00 - ALL CLINICS

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

Back to List

Owner Name AARON WILLIS	Vendor Name test	Sales Tax Number 899898
Submitter Name TEST, TS	Submitter Title dude	Submission Date 08/09/2018

PHARMACY:  Yes  No

## ARIZONA WIC PROGRAM

### VENDOR APPLICATION

PLEASE ANSWER ALL QUESTIONS AND  
INCOMPLETE APPLICATIONS WILL NOT BE PROCESSED.

Submission of this application does not constitute authorization to participate in the Arizona WIC Program. This application is NOT a Contract. Participation in the Arizona WIC Program will not be authorized until all completed application materials have been received, evaluated and approved.

**Part I - Owner**

Owner: AARON WILLIS

---

Business Address:	Phone: (555) 555-5555
2330 W. BETHANY ROAD	Fax:
PHOENIX, AZ 85015 County: MARICOPA	Cell:
Mailing Address:	
2330 W. BETHANY ROAD	
PHOENIX, AZ 85015 County: MARICOPA	

8.56 x 11.00 in

*Figure: PDF view of Archived applications*

### 11.3 Food Declare:

Navigation path – Vendor web admin-> Food Declare

This screen allows user to Add, Edit or Delete the food categories and food items. User clicks on Add button.

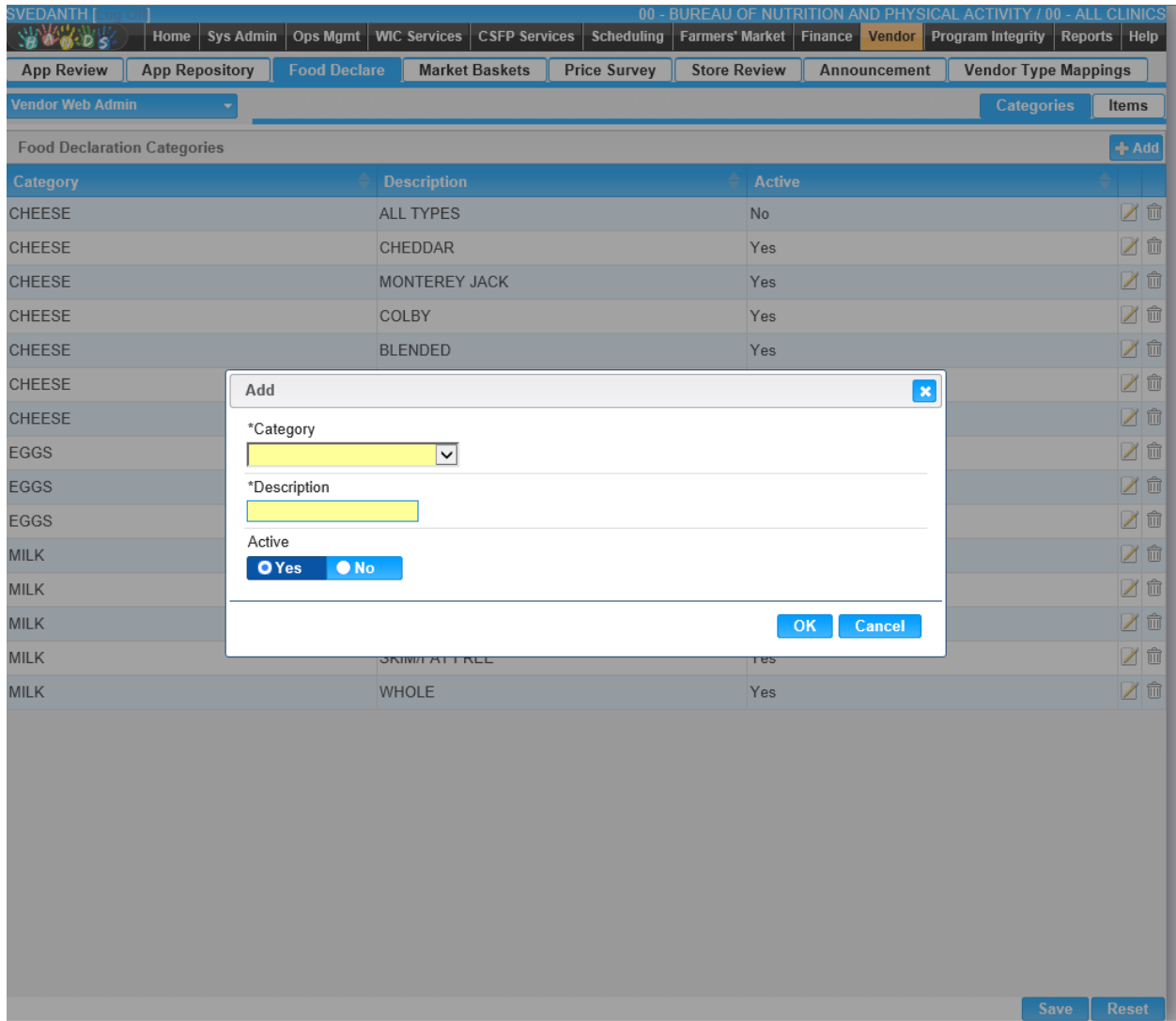


Figure: Adding the food Categories

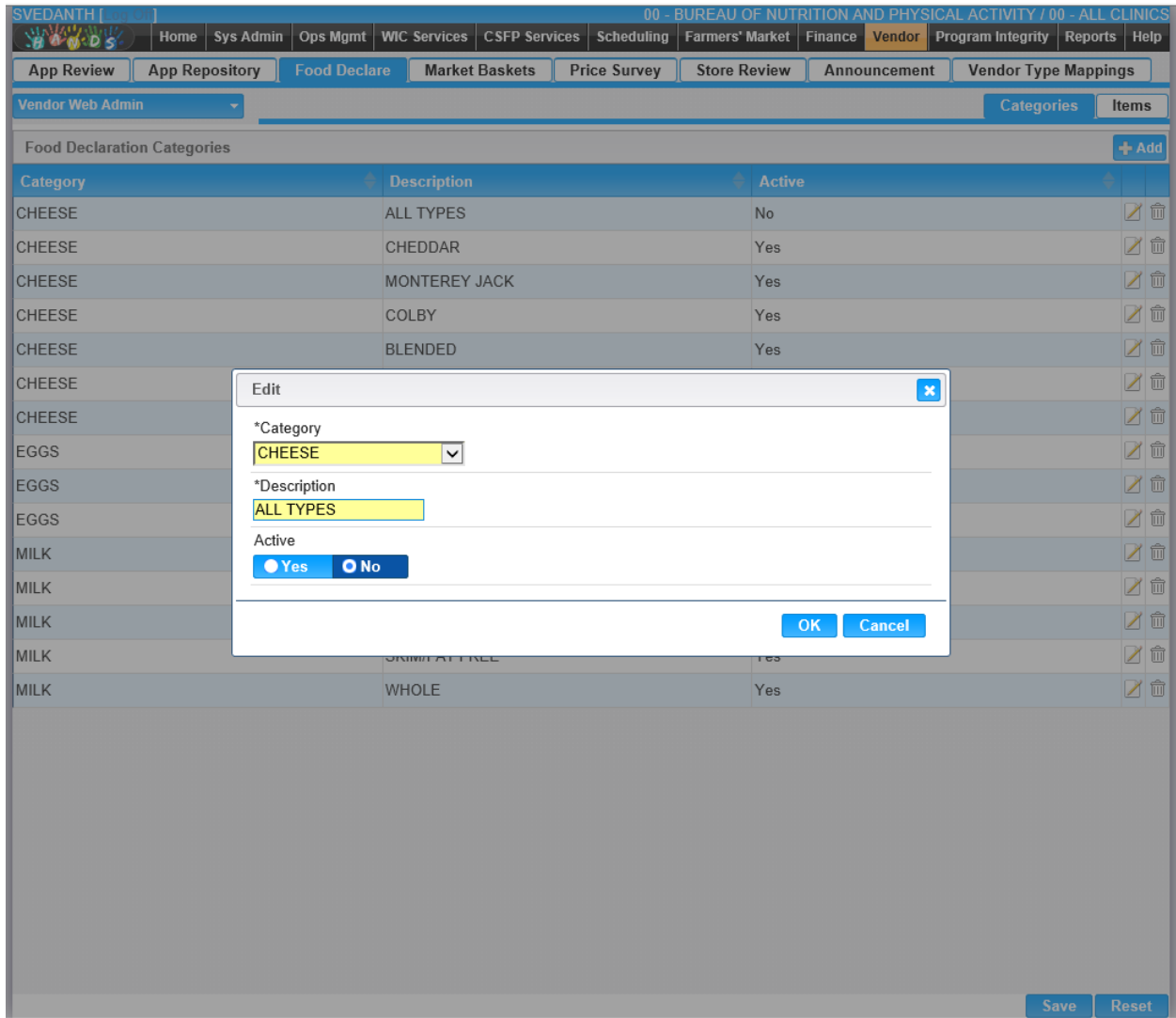


Figure: Editing the food Categories

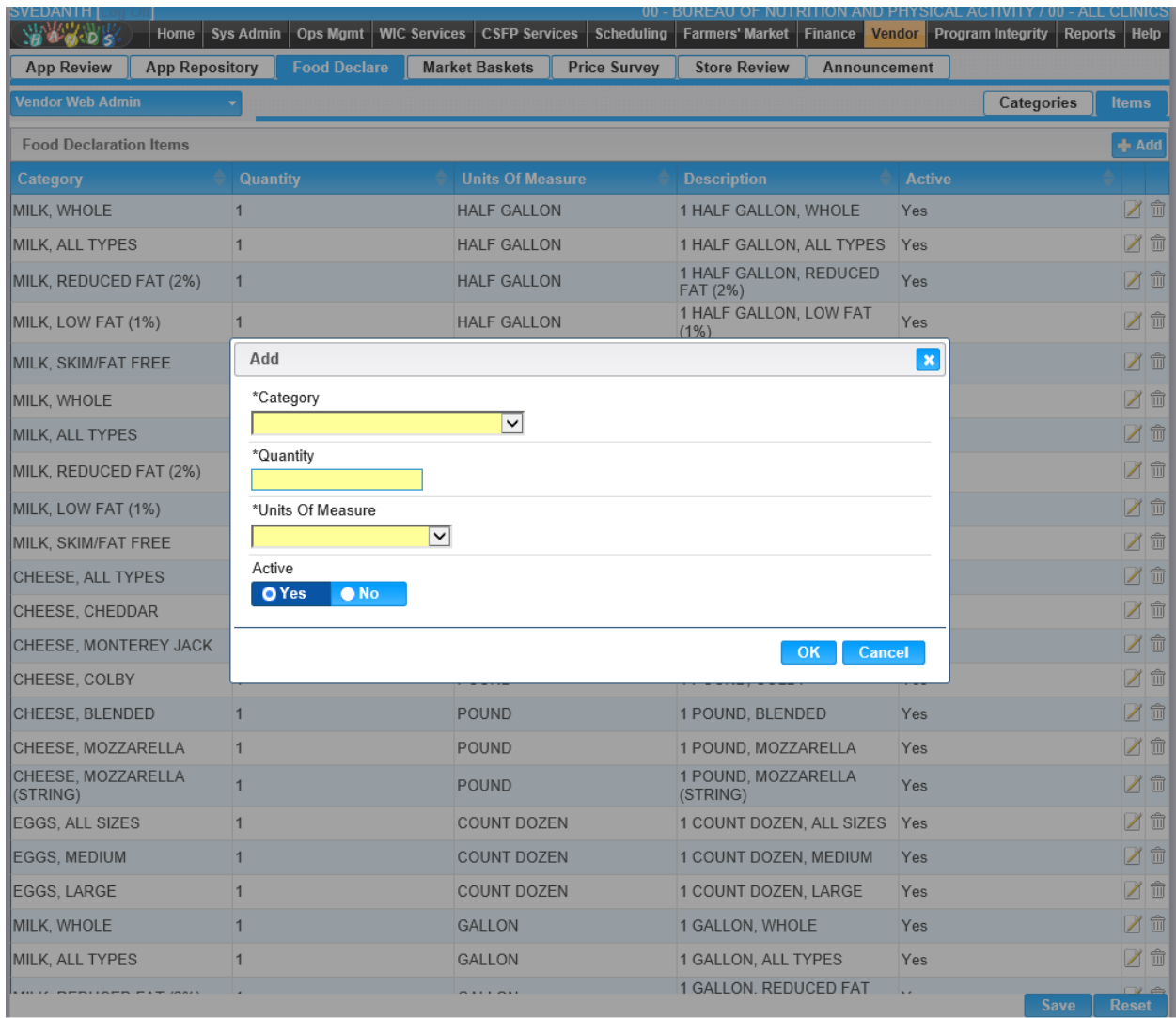


Figure: Adding the food Items

The screenshot shows the 'Food Declare' application interface. At the top, there is a navigation bar with tabs for 'App Review', 'App Repository', 'Food Declare', 'Market Baskets', 'Price Survey', 'Store Review', and 'Announcement'. Below this is a 'Vendor Web Admin' dropdown menu and buttons for 'Categories' and 'Items'. The main area displays a table of 'Food Declaration Items' with columns for Category, Quantity, Units Of Measure, Description, and Active. An 'Edit' dialog box is open over the 'MILK, WHOLE' row, showing fields for Category (MILK, WHOLE), Quantity (1), Units Of Measure (HALF GALLON), and Active (Yes). The dialog also has 'OK' and 'Cancel' buttons.

Category	Quantity	Units Of Measure	Description	Active
MILK, WHOLE	1	HALF GALLON	1 HALF GALLON, WHOLE	Yes
MILK, ALL TYPES	1	HALF GALLON	1 HALF GALLON, ALL TYPES	Yes
MILK, REDUCED FAT (2%)	1	HALF GALLON	1 HALF GALLON, REDUCED FAT (2%)	Yes
MILK, LOW FAT (1%)	1	HALF GALLON	1 HALF GALLON, LOW FAT (1%)	Yes
MILK, SKIM/FAT FREE				
MILK, WHOLE				
MILK, ALL TYPES				
MILK, REDUCED FAT (2%)				
MILK, LOW FAT (1%)				
MILK, SKIM/FAT FREE				
CHEESE, ALL TYPES				
CHEESE, CHEDDAR				
CHEESE, MONTEREY JACK				
CHEESE, COLBY				
CHEESE, BLENDED	1	POUND	1 POUND, BLENDED	Yes
CHEESE, MOZZARELLA	1	POUND	1 POUND, MOZZARELLA	Yes
CHEESE, MOZZARELLA (STRING)	1	POUND	1 POUND, MOZZARELLA (STRING)	Yes
EGGS, ALL SIZES	1	COUNT DOZEN	1 COUNT DOZEN, ALL SIZES	Yes
EGGS, MEDIUM	1	COUNT DOZEN	1 COUNT DOZEN, MEDIUM	Yes
EGGS, LARGE	1	COUNT DOZEN	1 COUNT DOZEN, LARGE	Yes
MILK, WHOLE	1	GALLON	1 GALLON, WHOLE	Yes
MILK, ALL TYPES	1	GALLON	1 GALLON, ALL TYPES	Yes
MILK, REDUCED FAT (2%)	1	GALLON	1 GALLON, REDUCED FAT (2%)	Yes

Figure: Editing the food Items



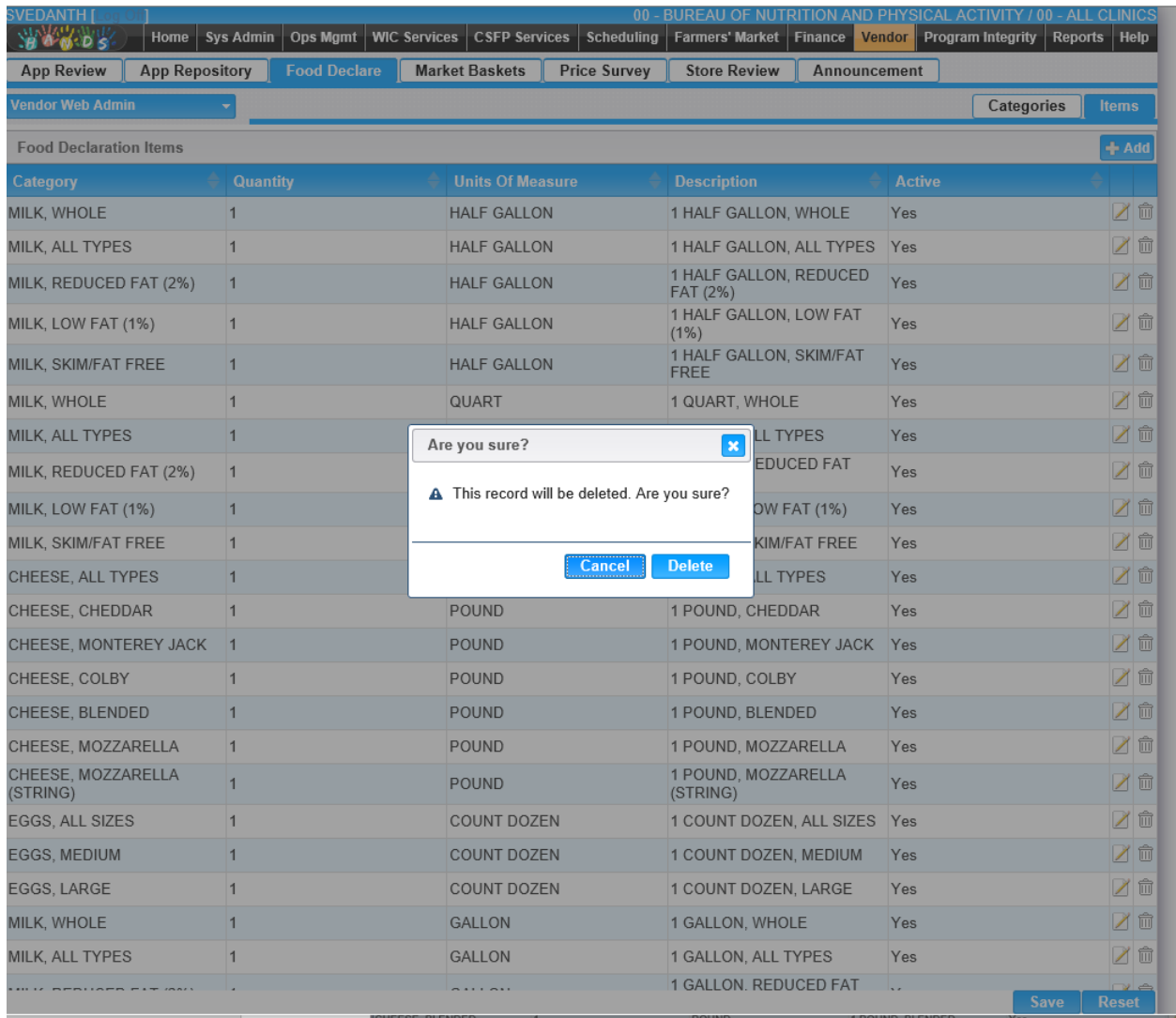


Figure: Deleting the food Items

### 11.4 Market Baskets

Navigation path – Vendor web admin-> Market Baskets

This screen displays all the defined market baskets and allows the user to edit or delete the market basket. This screen is available only to authorized users.

To create a new market basket, click the “Add” button, which causes a new row to be added to the displayed list and supports in-line editing.

To add food categories/ Sizes to the new market basket, click the “ADD” button

All required fields must be entered. Information about an existing market basket itself (metadata) may be edited.

Existing market baskets can be deleted if it has not previously been used to analyze a price survey.

Food items tab will allow the user to add, Edit or delete the Food item.

Market Basket Name	Survey Date	Start Date	End Date
<input checked="" type="checkbox"/> JUNE 15, 2018	06/15/2018	06/01/2018	11/30/2018
<input checked="" type="checkbox"/> DECEMBER 15, 2017	12/15/2017	12/01/2017	05/31/2018
<input checked="" type="checkbox"/> JUNE 15, 2017	06/15/2017	06/01/2017	11/30/2017
<input checked="" type="checkbox"/> DECEMBER 15, 2016	12/15/2016	12/01/2016	05/31/2017
<input checked="" type="checkbox"/> JUNE 15, 2016	06/15/2016	06/01/2016	11/30/2016
<input checked="" type="checkbox"/> DECEMBER 15, 2015	12/15/2015	12/01/2015	05/31/2016
<input checked="" type="checkbox"/> JUNE 15, 2015	06/15/2015	06/01/2015	11/30/2015
<input checked="" type="checkbox"/> DECEMBER 15, 2014	12/15/2014	12/01/2014	05/31/2015
<input checked="" type="checkbox"/> JUNE 15, 2014	06/15/2014	06/01/2014	11/30/2014
<input checked="" type="checkbox"/> DECEMBER 15, 2013	12/15/2013	12/01/2013	05/31/2014
<input checked="" type="checkbox"/> JUNE 15, 2013	06/15/2013	06/01/2013	11/30/2013
<input checked="" type="checkbox"/> DECEMBER 15, 2012	12/15/2012	12/01/2012	05/31/2013
<input checked="" type="checkbox"/> JUNE 15, 2012	06/15/2012	06/01/2012	11/30/2012
<input checked="" type="checkbox"/> DECEMBER 15, 2011	12/15/2011	12/01/2011	05/31/2012
<input checked="" type="checkbox"/> JUNE 15, 2011	06/15/2011	06/01/2011	11/30/2011
<input checked="" type="checkbox"/> DECEMBER 15, 2010	12/15/2010	12/01/2010	05/31/2011
<input checked="" type="checkbox"/> JUNE 15 2010	06/15/2010	06/01/2010	11/30/2010
<input checked="" type="checkbox"/> DECEMBER 15, 2009	12/15/2009	12/01/2009	06/15/2010
<input checked="" type="checkbox"/> JUNE 15 2009	06/15/2009	05/31/2009	12/15/2009

*Figure: Available Market Baskets*

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\*Market Basket Name  \*Survey Date  \*Start Date  \*End Date

Market Basket Foods + Add

Description	Brand / Variety	Min Size	Max Size	Measurement Units
No data to show				

Save Reset

*Figure: Adding new Market Baskets*

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App Review App Repository Food Declare Market Baskets Price Survey Store Review Announcement

Vendor Web Admin Market Baskets Food Categories / Sizes Food Items

Available Food Sizes + Add

Description	Size Type	Min Size	Max Size	Measurement Units	Weight Factor		
BABY FOOD	EQUAL MIN OR MAX	4	4	OUNCE, FLUID OR DRY	128		
BABY FOOD	EQUAL MIN OR MAX	4	4	OUNCE, FLUID OR DRY	128		
CEREAL	BETWEEN MIN OR MAX	14	18	OUNCE, FLUID OR DRY	36		
CHEESE	STANDARD	1	1	POUND	1		
EGGS	STANDARD	1	1	COUNT DOZEN	1		
INFANT FORMULA	EQUAL MIN OR MAX	12.9	12.9	OUNCE, FLUID OR DRY	128		
INFANT FORMULA	EQUAL MIN OR MAX	12.9	12.9	OUNCE, FLUID OR DRY	128		
INFANT FORMULA	EQUAL MIN OR MAX	12.4	12.4	OUNCE, FLUID OR DRY	128		
JUICE	STANDARD	64	64	OUNCE, FLUID OR DRY	2		
JUICE FROZEN	EQUAL MIN OR MAX	11.5	12	OUNCE, FLUID OR DRY	64		
MILK	STANDARD	1	1	GALLON	4		
MILK	STANDARD	1	1	GALLON	4		
PEANUT BUTTER	BETWEEN MIN OR MAX	16	18	OUNCE, FLUID OR DRY	18		
TUNA	STANDARD	5	5	OUNCE, FLUID OR DRY	6		

Save Reset

Figure: Food categories / Sizes

Available Food Items			+ Add
Description	Brand / Variety	Include in Analysis	
MILK, 1 GALLON	2%	Yes	
BABY FOOD, 4 OUNCE, FLUID OR DRY	Gerber (any vegetable)	Yes	
MILK, 1 GALLON	Store or House (Whole)	No	
MILK, 1 GALLON	Store or House (1%)	Yes	
INFANT FORMULA, 12.9 OUNCE, FLUID OR DRY	Enfamil ProSobee (Powder)	No	
CHEESE, 1 POUND	Store or House (Cheddar)	Yes	
CHEESE, 1 POUND	Store or House (Monterey Jack)	No	
EGGS, 1 COUNT DOZEN	Store or House (Large, White, Chicken)	Yes	
JUICE, 64 OUNCE, FLUID OR DRY	Tree Top (Apple)	Yes	
JUICE FROZEN, 11.5 to 12 OUNCE, FLUID OR DRY	Any Brand (Frozen Orange Juice)	No	
CEREAL, 14 to 18 OUNCE, FLUID OR DRY	Cheerios (Plain)	Yes	
CEREAL, 14 to 18 OUNCE, FLUID OR DRY	Kix (Plain)	No	
PEANUT BUTTER, 16 to 18 OUNCE, FLUID OR DRY	Any Brand (Plain/Creamy/Chunky)	Yes	
TUNA, 5 OUNCE, FLUID OR DRY	Any Brand (Water-Packed)	Yes	
BABY FOOD, 4 OUNCE, FLUID OR DRY	ANY WIC AUTHORIZED BRAND (ANY VEGETABLE)	Yes	
INFANT FORMULA, 12.4 OUNCE, FLUID OR DRY	Similac Advance W/Iron (Powder)	Yes	
INFANT FORMULA, 12.9 OUNCE, FLUID OR DRY	GERBER GOOD START SOY	No	

Figure: Food Items

### 11.5 Price Survey

Navigation path – Vendor web admin-> Price Survey

Screen shows Submitted Price Surveys in the grid to Transfer or Reject the price survey.

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App Review App Repository Food Declare Market Baskets Price Survey Store Review Announcement Vendor Type Mappings

Vendor Web Admin

Owner: ABC Grocers \*Survey Date: 6/15/2018

Submitted Price Surveys

Owner Name	Market Basket Description	Vendor	Zone
ABC Grocers	<input checked="" type="checkbox"/> JUNE 15, 2018	6678 - UC2test	N/A

Search New Search

Figure: Price Survey

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Market Basket Description: JUNE 15, 2018  
 Owner Name: ABC GROCERS  
 SalesTaxNumber: 123456

Vendor: 6678 - UC2test  
 Submitter Name: TEST, TEST  
 Submitter Title: mr

Transfer Reject

Price Survey Review

Price Survey Submitted By: Test, Test Title: mr  
 Price Survey Submitted On: 04/26/2019 10:02:48 AM

Vendor: UC2test

Category	Food Item	Item Size	Item Cost
BABY FOOD	ANY WIC AUTHORIZED BRAND (ANY VEGETABLE)	4 OZ	\$0.01
CEREAL	Cheerios (Plain)	15 OZ	\$0.01
CEREAL	Kix (Plain)	15 OZ	\$0.01
CHEESE	Store or House (Cheddar)	1 LB	\$0.01
CHEESE	Store or House (Monterey Jack)	1 LB	\$0.01
EGGS	Store or House (Large, White, Chicken)	1 CDOZ	\$0.01
INFANT FORMULA	GERBER GOOD START SOY	12.9 OZ	\$0.01
INFANT FORMULA	Similac Advance W/Iron (Powder)	12.4 OZ	\$0.01
JUICE	Tree Top (Apple)	64 OZ	\$0.01
JUICE FROZEN	Any Brand (Frozen Orange Juice)	11.6 OZ	\$0.01
MILK	Store or House (1%)	1 GAL	\$0.01
MILK	Store or House (Whole)	1 GAL	\$0.01
PEANUT BUTTER	Any Brand (Plain/Creamy/Chunky)	17 OZ	\$0.01

Figure: Price Survey with Transfer and Reject options

### 11.6 Store Review:

Navigation path – Vendor web admin-> Store Review

Allows the user to review vendors that have updated their information. Allow the user to review, approve, or reject changes made to store information.

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App Review App Repository Food Declare Market Baskets Price Survey Store Review Announcement Vendor Type Mappings

Vendor Web Admin

Owner  
A & S CACTUS EXPRESS INC.

Stores with Changes Pending Review

Vendor Name	Owner Name	Status	City
<input checked="" type="checkbox"/> CARNICERIA EL BRONCO	NASIR LAND ENTERPRISES I, LLC	PENDING	PHOENIX
<input checked="" type="checkbox"/> ALBERTSON'S #940	ALBERTSON'S,LLC	PENDING	TEMPE
<input checked="" type="checkbox"/> AMIGOS MERCADO	Brandi Rodriguez	PENDING	CHANDLER
<input checked="" type="checkbox"/> GOODYEAR FOOD STORE	kamel shiha	PENDING	GOODYEAR
<input checked="" type="checkbox"/> PHOENIX MINI MARKET	SABRINA MINI MARKET INC	PENDING	PHOENIX
<input checked="" type="checkbox"/> GUADALUPE FARMERS MARKET	MATTA INVESTMENTS LLC	PENDING	GUADALUPE
<input checked="" type="checkbox"/> ALBERTSON'S #2951	ALBERTSON'S,LLC	PENDING	YUMA
<input checked="" type="checkbox"/> Haat Bazaar	Sarmin Sultana	PENDING	PHOENIX

<< < > >> Row count: 10 Showing 1-8 of 8

Search New Search

*Figure: Store changes with pending review*



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Stores with Changes Pending Review

Field Name	Requested Change	Current Value
STORE PHONE	(480) 820-8166	(602) 843-1871
OTHER PHONE		(602) 843-1871
OTHER PHONE TYPE		WP

Approve Reject

*Figure: Store changes with Approve and Pending options*

### 11.7 Announcements

Navigation path – Vendor web admin-> Announcements.

Allows the user to define announcement text and the dates during which it will be displayed on the Vendor Web Home page. One or more announcements may be defined.

SVEDANTH [ ] 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 Help

App Review App Repository Food Declare Market Baskets Price Survey Store Review Announcement Vendor Type Mappings

Vendor Web Admin

Title  Start Date ON  End Date ON

Vendor Announcement Search Results

Title	Start Date	End Date
<input checked="" type="checkbox"/> 1. REMINDER	12/01/2017	12/15/2017
<input checked="" type="checkbox"/> 1. WELCOME TO THE NEW VENDOR WEB SITE!	03/29/2015	03/26/2017
<input checked="" type="checkbox"/> 2. FOOD ITEM DECLARATION:	06/11/2015	03/26/2017
<input checked="" type="checkbox"/> 2. FOOD ITEM DECLARATION	12/01/2017	
<input checked="" type="checkbox"/> 3. STATEWIDE AVERAGE LOOK UP	04/14/2015	03/26/2017
<input checked="" type="checkbox"/> 3. MARKET BASKET NOTICE	12/01/2017	
<input checked="" type="checkbox"/> 4. ELECTRONIC SIGNATURE	12/01/2017	
<input checked="" type="checkbox"/> ALL YOUR DEV ARE BELONG TO US	08/01/2019	08/02/2019
<input checked="" type="checkbox"/> DOMAIN TEST	10/02/2019	10/03/2019
<input checked="" type="checkbox"/> HUMPDAY	06/01/2018	06/01/2018
<input checked="" type="checkbox"/> MANAGER	11/01/2019	11/29/2019
<input checked="" type="checkbox"/> SMOKE	07/03/2018	07/03/2018
<input checked="" type="checkbox"/> TEST	11/08/2017	11/16/2017
<input checked="" type="checkbox"/> TEST	05/13/2018	05/13/2018
<input checked="" type="checkbox"/> VENDOR MORATORIUM	03/28/2017	11/30/2017

Add Search New Search

Figure: List of Announcements

The screenshot shows the 'Vendor' page in the HANDS WIC System. The page title is '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. The navigation menu includes: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor (highlighted), Program Integrity, Reports, and Help. A 'Back to List' button is located at the top left. The form contains the following fields:

- \*Title: A text input field.
- \*Start Date: A date input field.
- End Date: A date input field.
- \*Message: A large text area for entering the announcement message.

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

*Figure: Adding new Announcement*

## 11.8 Vendor Type Mapping

The type of the Vendor/Applicant. This field is mandatory and is initially calculated and populated based on the Vendor's Peer Group. Below are the Vendor Types that are set by the Vendor Web system via the chosen Peer Group.

The field will be updatable on the 'Vendor Demographics - General' page, which will update the Vendor's Type throughout the Vendor module (as per current functionality) and will then sync to the Vendor Web schema.

Note: Figure is relevant only for the initial population of the Vendor Type. Once the values for both the Peer Group and Vendor Type have been assigned to a vendor and transferred into HANDS they're no longer constrained by the other field, because the Vendor Type will no longer be null.

SVEDANTH [ ] 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 Help

App Review App Repository Food Declare Market Baskets Price Survey Store Review Announcement Vendor Type Mappings

Vendor Web Admin

Vendor Type Mappings

Peer Group	Vendor Type	
1 - PHARMACY	E - PHARMACY 1/INDEPENDENT	<input type="checkbox"/>
2 - NATIONAL, REGIONAL, OR LOCAL CHAIN	H - SUPER CENTERS	<input type="checkbox"/>
3 - SUPER CENTERS	H - SUPER CENTERS	<input type="checkbox"/>
4 - LARGE URBAN INDEP (> \$750,000 GROSS SALES)	H - SUPER CENTERS	<input type="checkbox"/>
5 - SMALL URBAN INDEP (< \$750,000 GROSS SALES)	B - SMALL CHAIN (+6 OUTLETS, CONFINED AREA OPERATIONS)	<input type="checkbox"/>
6 - LARGE RURAL INDEP (> \$750,000 GROSS SALES)	A - MAJOR CHAIN (+10 OUTLETS, MULTI-STATE OPERATIONS)	<input type="checkbox"/>
7 - SMALL RURAL INDEP (< \$750,000 GROSS SALES)	B - SMALL CHAIN (+6 OUTLETS, CONFINED AREA OPERATIONS)	<input type="checkbox"/>
8 - ABOVE 50% VENDOR	G - ABOVE 50 PERCENT	<input type="checkbox"/>
9 - COMMISSARY AWESOME GROUP	D - COMMISSARY	<input type="checkbox"/>
18 - TESTING THE BUG 65312		<input type="checkbox"/>
19 - TEST WITH EXCLUDE FLAG NO		<input type="checkbox"/>
25 - TEST TEST TEST	H - SUPER CENTERS	<input type="checkbox"/>
26 - 26 PEER GROUP	C - INDEPENDENT (1 OR MRE, BUT <6 OUTLETS)	<input type="checkbox"/>
27 - 27 PEER GROUP - HIGH RISK IS UPDATED AND A50 FLAG IS SET TO YES	E - PHARMACY 1/INDEPENDENT	<input type="checkbox"/>
28 - 28 PEER GROUP	B - SMALL CHAIN (+6 OUTLETS, CONFINED AREA OPERATIONS)	<input type="checkbox"/>



Save Reset

Figure: Adding new Announcement

## 12 BASE TABLES

Base Tables are used by the User to configure different values through-out the system. A common use of a Base Table is to supply the values for a Drop Down list, which allows the User to select from a designated value to populate a field. The Vendor Base Tables can be found under the Sys Admin tab. By Clicking on the Vendor Base Tables navigation, the list of available Base Tables is displayed. Grid columns are sortable by ascending or descending order by pressing the up or down arrows at the right of the column label.

### 12.1 Application Milestones

Current records for Application Milestone will appear in the Application Milestone Grid. The user can add further Application Milestones to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, "Record saved successfully" appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Application Milestones page

Navigation Path: Sys Admin / Vendor Base Tables /Application Milestones

Vat Application Type	Vmt1 Milestone Type	Days Out	Seq ID	Date Created	Created By	Date Modified	Modified By	Note		
CO	AA	1	110	02/15/2000	ARIZONA					
CO	AD	1	120	02/15/2000	ARIZONA					
CO	AN	1	130	02/15/2000	ARIZONA					
CO	SI	1	140	02/15/2000	ARIZONA					
CO	CE	2	150	02/15/2000	ARIZONA					
CO	PS	1	160	02/15/2000	ARIZONA					
CO	SA	5	999	02/15/2000	ARIZONA					
HD	RA	0	10	02/15/2000	ARIZONA					
HD	AS	0	20	02/15/2000	ARIZONA					
HD	AI	0	30	02/15/2000	ARIZONA					

Figure : Application Milestones

Fields:

- **Vat Application Type** – The type of application that a milestone will be applied to.
- **Vmt1 Milestone Type** – This field represents the type of milestone.
- **Days Out** – The number of days until the milestone is due.
- **Seq ID** – The sequence in which the milestones should appear for the vendor.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
- **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.

CTHURBER [Log Out] 02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC

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**Application Milestones**

Vat Application Type  
CO


Vmt1 Milestone Type  
AA

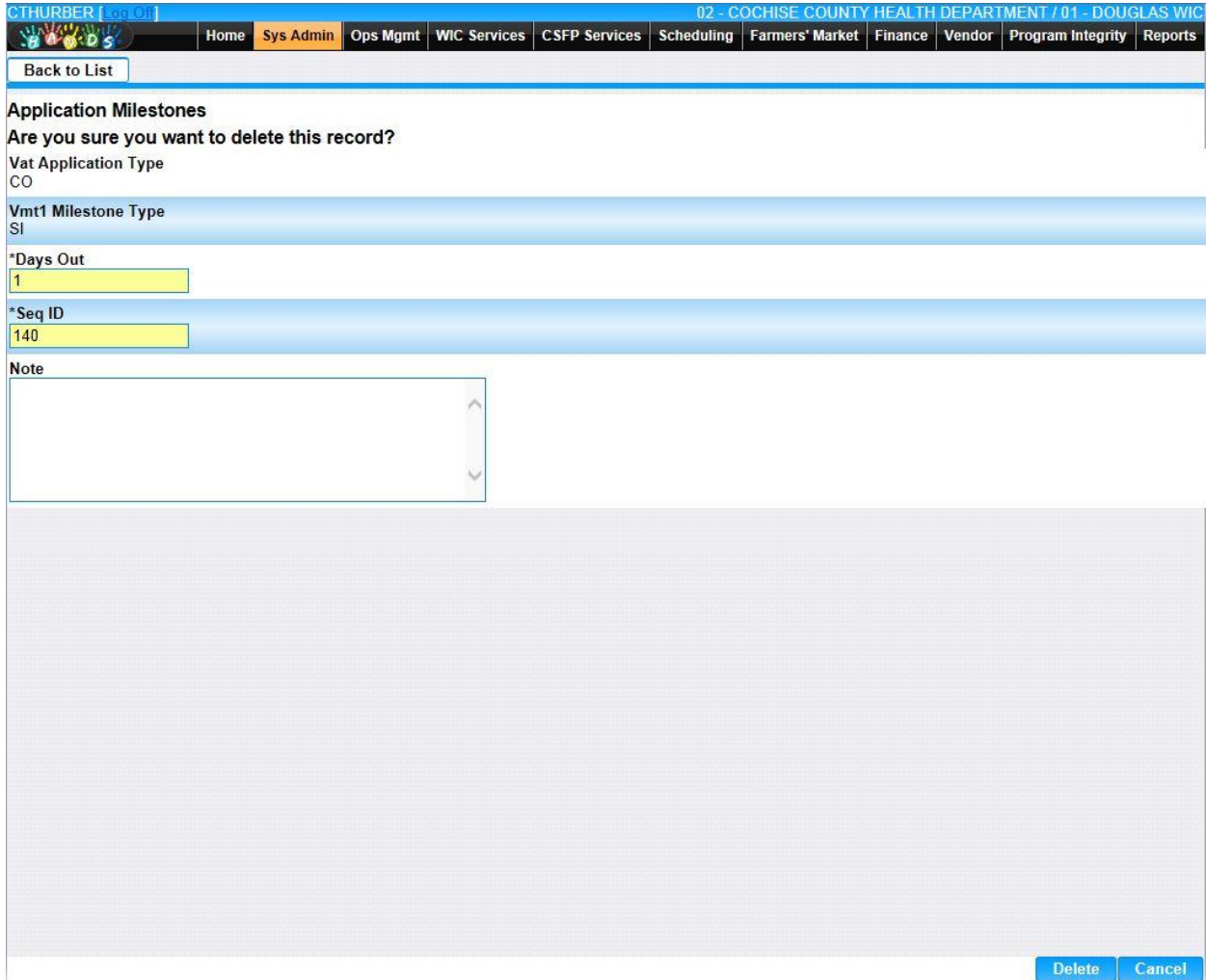
\*Days Out  
1

\*Seq ID  
110

Note

Save Reset

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



The screenshot shows a web application interface with a navigation menu at the top. The menu includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The 'Sys Admin' menu item is highlighted. Below the menu is a 'Back to List' button. The main content area is titled 'Application Milestones' and contains the following text: 'Are you sure you want to delete this record?'. Below this are several fields: 'Vat Application Type' with the value 'CO', 'Vmt1 Milestone Type' with the value 'SI', '\*Days Out' with the value '1', and '\*Seq ID' with the value '140'. There is also a 'Note' field which is currently empty. At the bottom right of the form, there are two buttons: 'Delete' and 'Cancel'.



*Buttons:*

- **Add** – When selected focus is passed to the Add Application Milestones page.

The screenshot shows a web application interface for adding application milestones. At the top, there is a navigation bar with the following items: Home, Sys Admin (highlighted), Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. Below the navigation bar is a 'Back to List' button. The main content area is titled 'Application Milestones' and contains the following fields:



- \*Vat Application Type: A dropdown menu with 'NOT SET' selected.
- \*Vmt1 Milestone Type: A dropdown menu with 'NOT SET' selected.
- \*Days Out: A text input field containing '0'.
- \*Seq ID: A text input field containing '0'.
- Note: A large text area for entering a note.

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

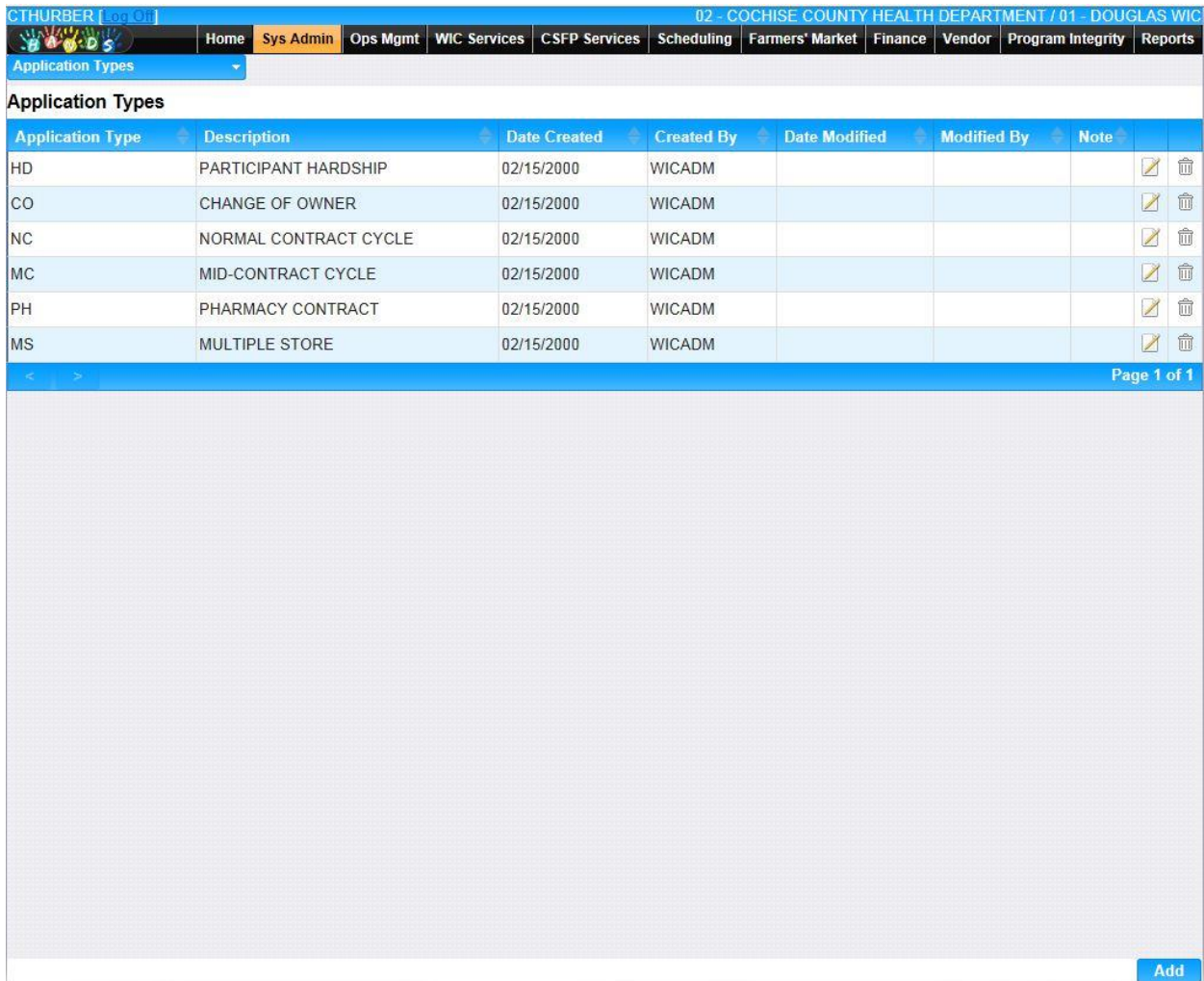
*Calculation(s): None*













*Background Processes: None*

## 12.2 Application Types

Current records for Application Types will appear in the Application Types Grid. The user can add further Application Types to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Application Types page.

*Navigation Path: Sys Admin / Vendor Base Tables /Application Types*




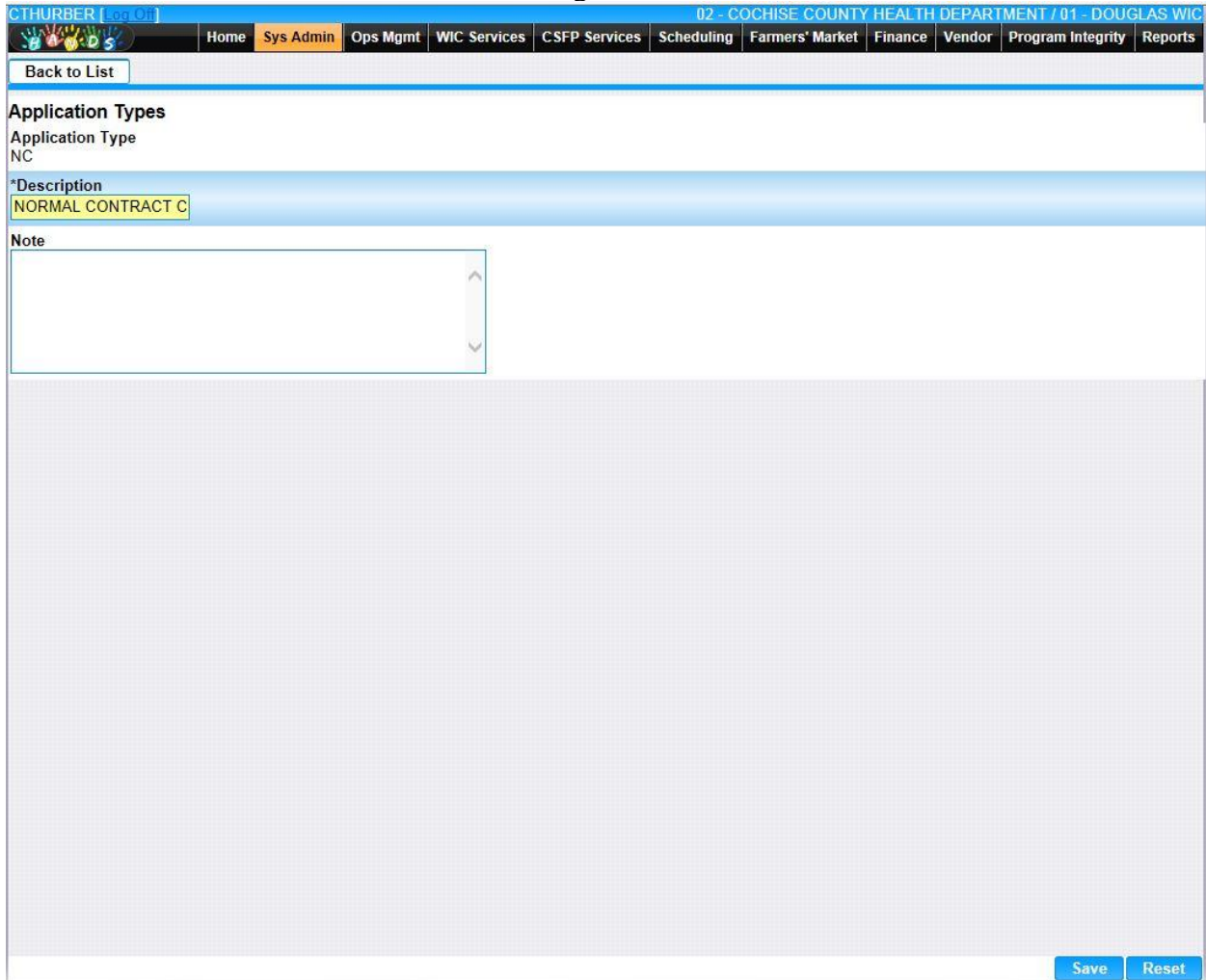
Application Type	Description	Date Created	Created By	Date Modified	Modified By	Note		
HD	PARTICIPANT HARDSHIP	02/15/2000	WICADM					
CO	CHANGE OF OWNER	02/15/2000	WICADM					
NC	NORMAL CONTRACT CYCLE	02/15/2000	WICADM					
MC	MID-CONTRACT CYCLE	02/15/2000	WICADM					
PH	PHARMACY CONTRACT	02/15/2000	WICADM					
MS	MULTIPLE STORE	02/15/2000	WICADM					

*Figure .: Application Types*

*Fields:*

- **Application Type** – The type of application that a milestone will be applied to.
- **Description** – The description of the application type.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.


- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.

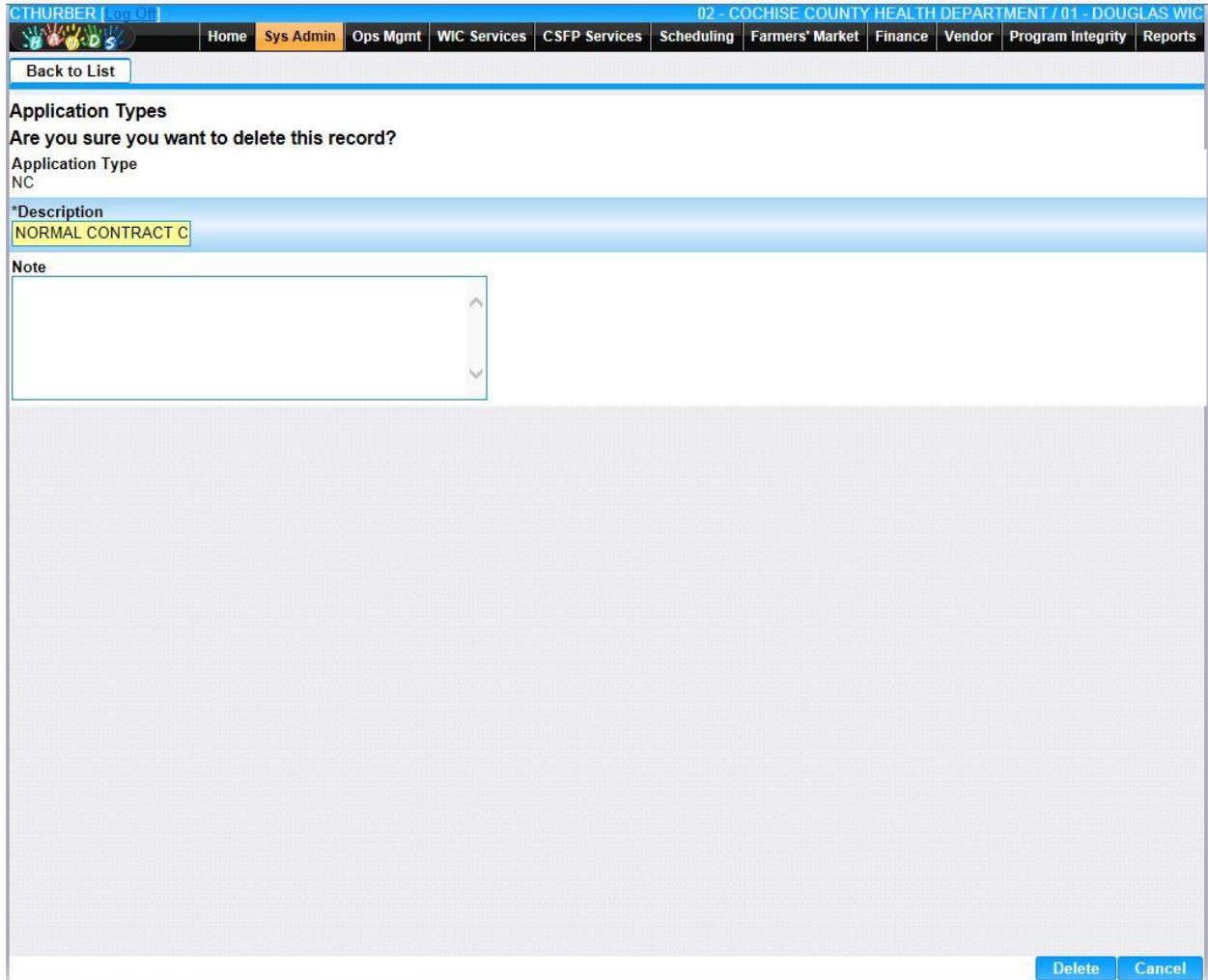


The screenshot shows a web application interface. At the top, there is a navigation bar with the user name 'CTHURBER' and a 'Log Out' link. The main navigation menu includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. Below the navigation bar is a 'Back to List' button. The main content area is titled 'Application Types' and contains the following fields:

- Application Type**: NC
- \*Description**: NORMAL CONTRACT C
- Note**: A large, empty text area with a vertical scrollbar.

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

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



*Buttons:*



- **Add** – When selected focus is passed to the Add Application Milestones page.

The screenshot shows a web application interface. At the top, there is a navigation bar with the user name 'CTHURBER [log out]' and the page title '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. Below this is a menu with items: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. A 'Back to List' button is located below the menu. The main content area is titled 'Application Types' and contains three input fields: '\*Application Type', '\*Description', and 'Note'. The 'Note' field is a larger text area with a vertical scrollbar. At the bottom right of the form, there are 'Save' and 'Reset' buttons.

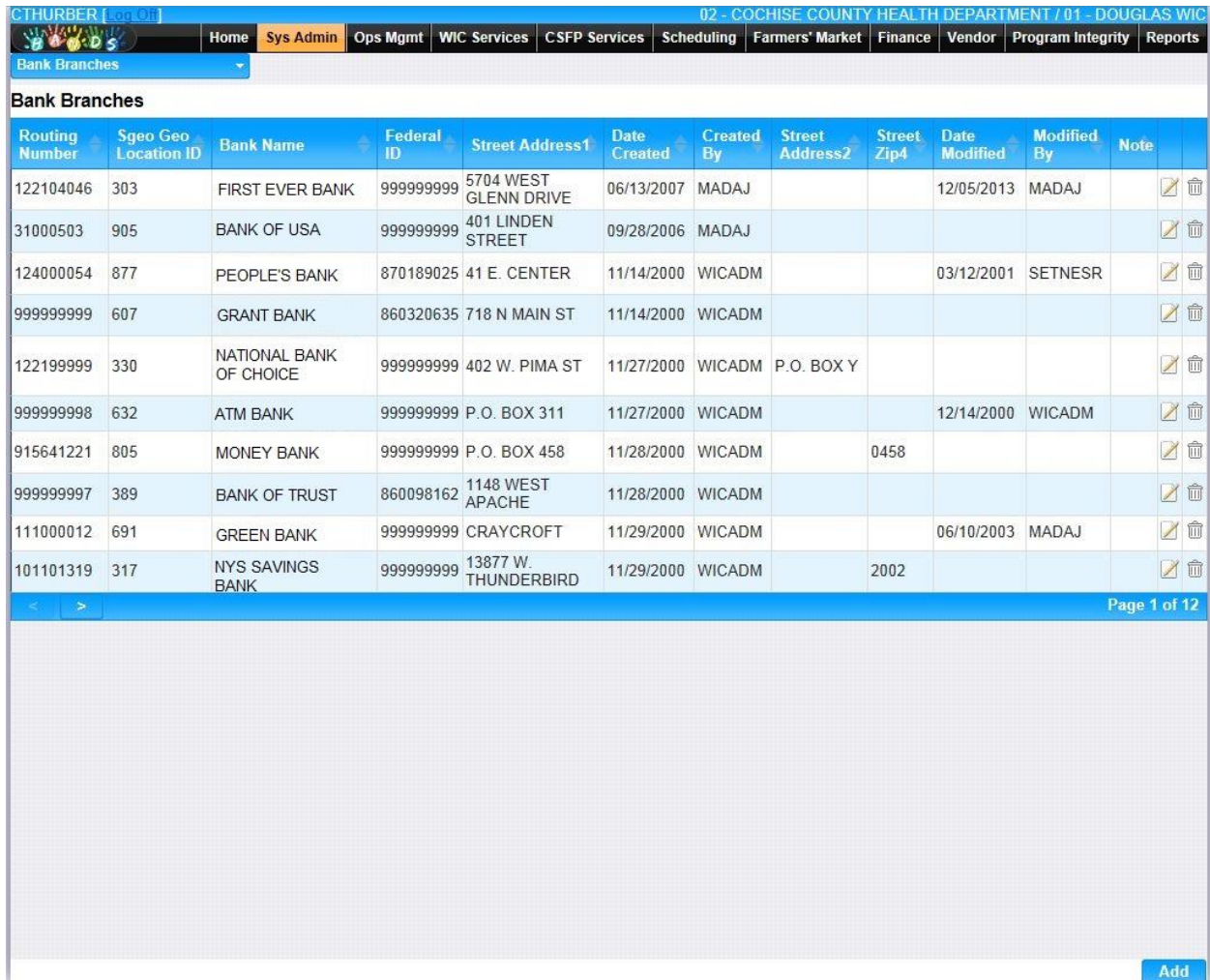
*Calculation(s): None*

*Background Processes: None*

### 12.3 Bank Branches

The Bank Branches Base Table is used under the Sales | Banks page. This Base Table is used to populate the Bank Drop Down list when the User is adding a Vendor Bank. Current records for Bank Branches will appear in the Bank Branch Grid. The user can add further Bank Branches to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Bank Branch page.

Navigation Path: Sys Admin | Vendor Base Tables |Bank Branches




Routing Number	Sgeo Geo Location ID	Bank Name	Federal ID	Street Address1	Date Created	Created By	Street Address2	Street Zip4	Date Modified	Modified By	Note
122104046	303	FIRST EVER BANK	999999999	5704 WEST GLENN DRIVE	06/13/2007	MADAJ			12/05/2013	MADAJ	
31000503	905	BANK OF USA	999999999	401 LINDEN STREET	09/28/2006	MADAJ					
124000054	877	PEOPLE'S BANK	870189025	41 E. CENTER	11/14/2000	WICADM			03/12/2001	SETNESR	
999999999	607	GRANT BANK	860320635	718 N MAIN ST	11/14/2000	WICADM					
122199999	330	NATIONAL BANK OF CHOICE	999999999	402 W. PIMA ST	11/27/2000	WICADM	P.O. BOX Y				
999999998	632	ATM BANK	999999999	P.O. BOX 311	11/27/2000	WICADM			12/14/2000	WICADM	
915641221	805	MONEY BANK	999999999	P.O. BOX 458	11/28/2000	WICADM		0458			
999999997	389	BANK OF TRUST	860098162	1148 WEST APACHE	11/28/2000	WICADM					
111000012	691	GREEN BANK	999999999	CRAYCROFT	11/29/2000	WICADM			06/10/2003	MADAJ	
101101319	317	NYS SAVINGS BANK	999999999	13877 W. THUNDERBIRD	11/29/2000	WICADM		2002			

Figure : Bank Branches

Fields:

- **Routing Number** – The routing number for the bank branch.
- **Sgeo Geo Location ID** – The system generated unique identifier for the geographic location.

- **Bank Name** – This field represents the name of the Bank.
- **Federal ID** – The Federal Employer Identification Number of a Vendor Owner.
- **Street Address1** – The first of two Street Address fields available for the Bank street address.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Street Address2** – The second of two Street Address fields available for the Bank street address.
- **Street Zip4** – The four-digit Zip Code of the Bank.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.

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**Bank Branches**

Routing Number  
122104046

\*Sgeo Geo Location ID  
303

\*Bank Name  
FIRST EVER BANK

\*Federal ID  
999999999


\*Street Address1  
5704 WEST GLENN DRI

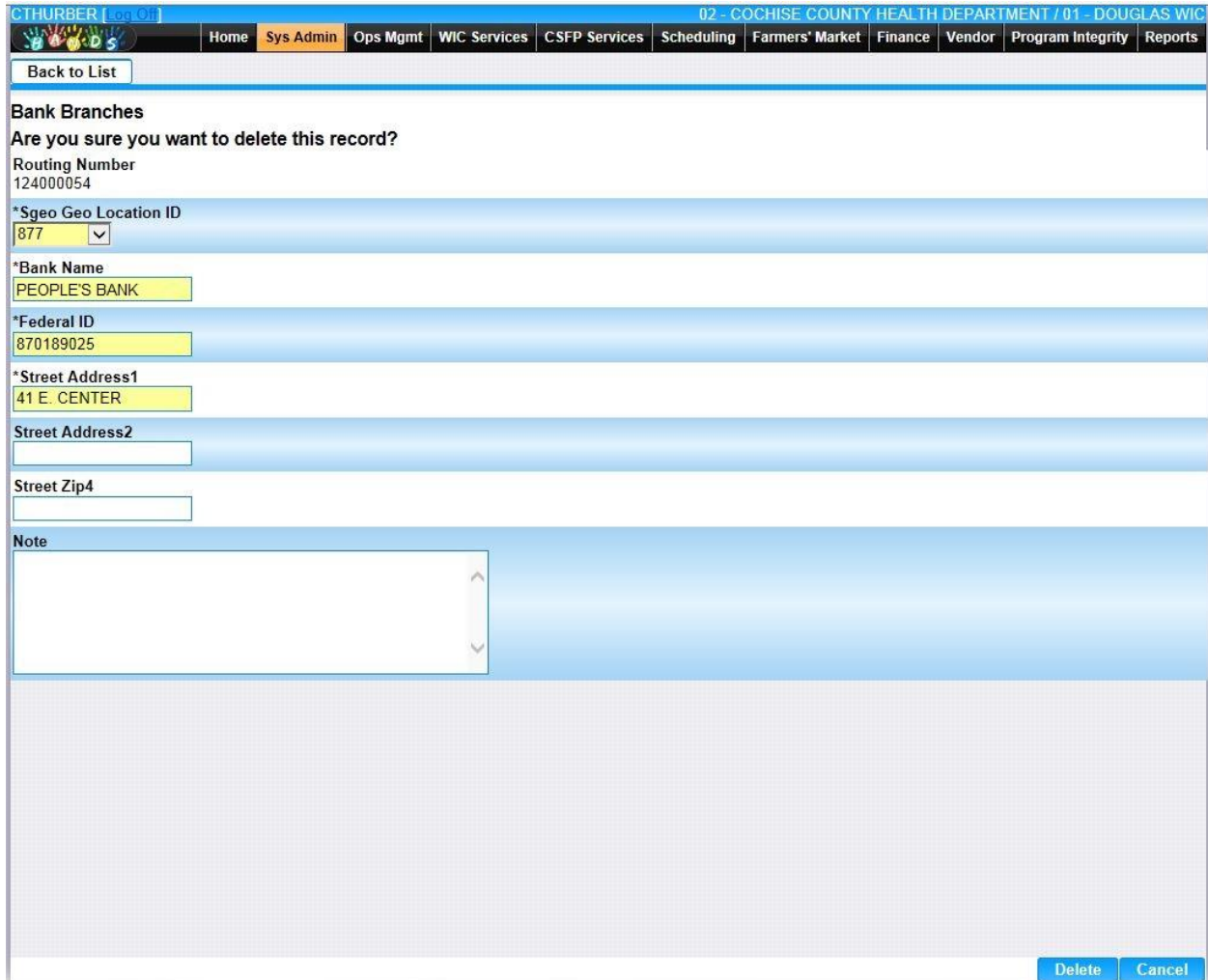
Street Address2

Street Zip4

Note

Save Reset

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



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**Bank Branches**

Are you sure you want to delete this record?

Routing Number  
124000054

\*Sgeo Geo Location ID  
877

\*Bank Name  
PEOPLE'S BANK

\*Federal ID  
870189025

\*Street Address1  
41 E. CENTER

Street Address2

Street Zip4

Note

Delete Cancel



*Buttons:*



- **Add** – When selected focus is passed to the Add Bank Branches page.

The screenshot shows a web application interface for adding bank branches. At the top, there is a navigation bar with the user name 'CTHURBER [log out]' and the system name '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. Below this is a menu with options: Home, Sys Admin (highlighted), Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. A 'Back to List' button is located below the menu. The main content area is titled 'Bank Branches' and contains several form fields: '\*Routing Number' (text input with '0'), '\*Sgeo Geo Location ID' (dropdown menu with 'NOT SET'), '\*Bank Name' (text input), '\*Federal ID' (text input), '\*Street Address1' (text input), 'Street Address2' (text input), and 'Street Zip4' (text input). Below these fields is a 'Note' section with a large text area and scroll arrows. At the bottom right of the form, there are 'Save' and 'Reset' buttons.

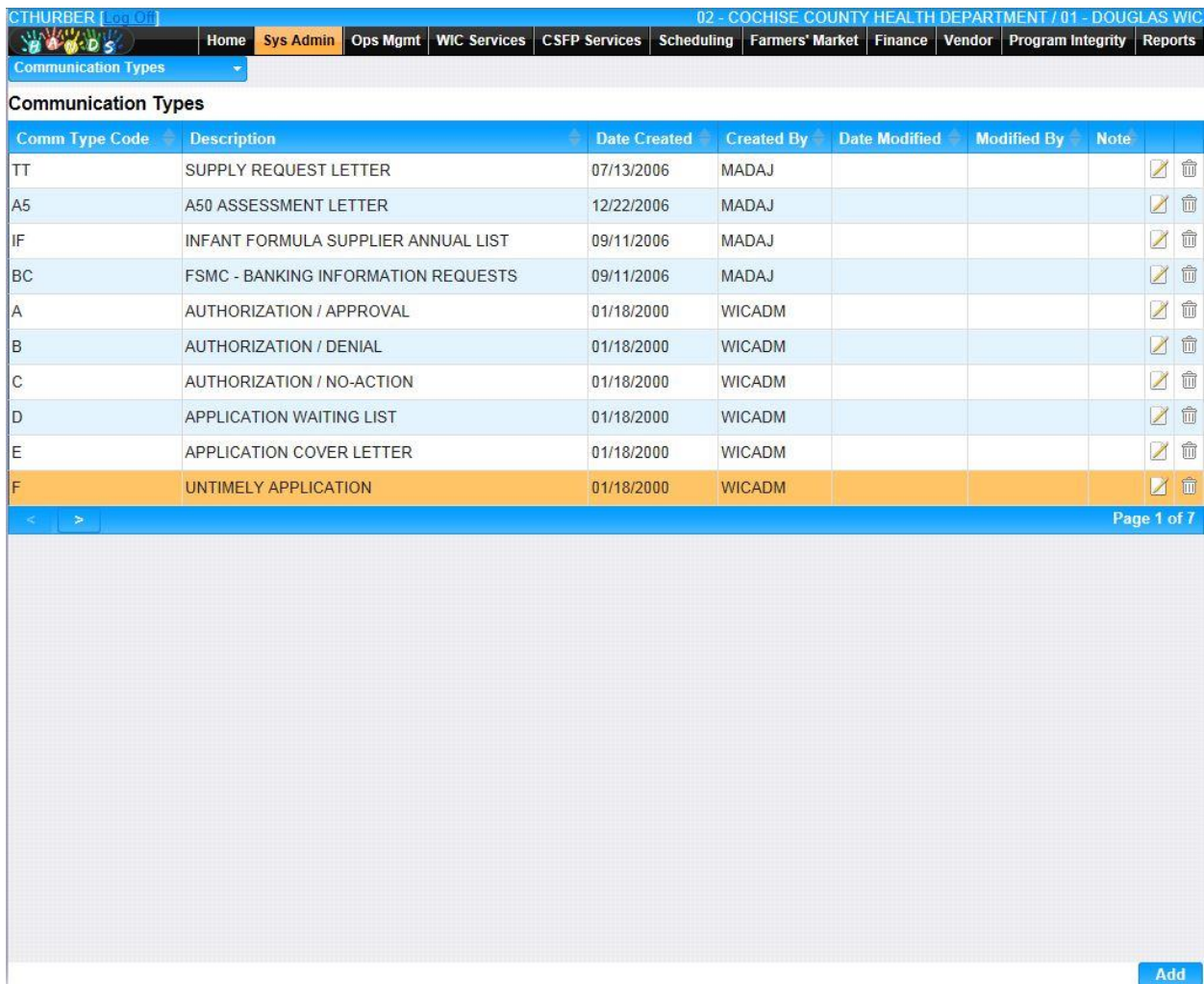
*Calculation(s): None*

*Background Processes: None*

### 12.4 Communication Types

The Communication Types Base Table is used under the Communication page. This Base Table is used to populate the Communication Type Drop Down list when the User is adding a Vendor Communication. This Base Table is also used to select the Communication Type for Mass Communications. Current records for Communication Types will appear in the Communication Types Grid. The user can add further Communication Types to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Communication Types page.

Navigation Path: Sys Admin / Vendor Base Tables /Communication Types
























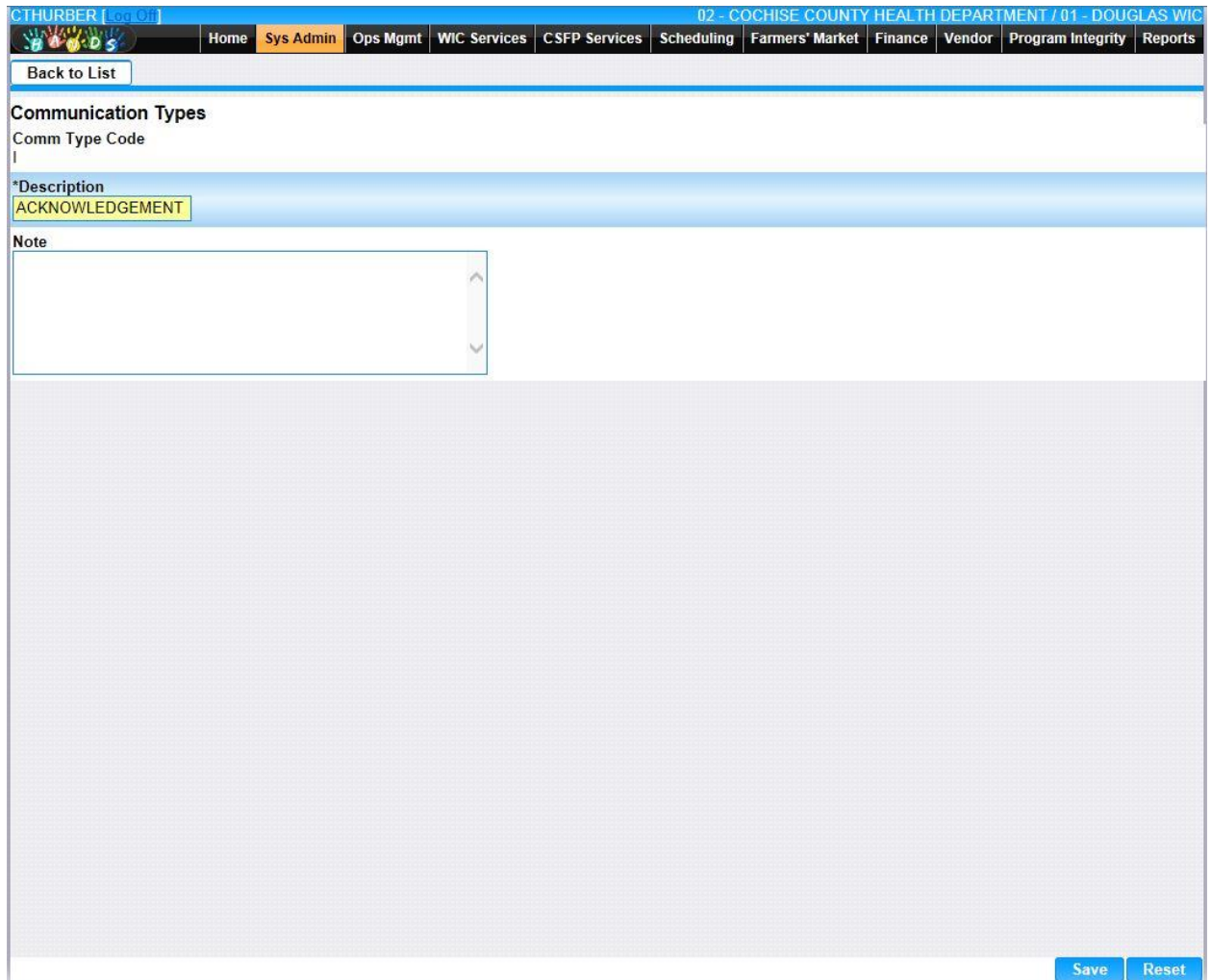
Comm Type Code	Description	Date Created	Created By	Date Modified	Modified By	Note		
TT	SUPPLY REQUEST LETTER	07/13/2006	MADAJ					
A5	A50 ASSESSMENT LETTER	12/22/2006	MADAJ					
IF	INFANT FORMULA SUPPLIER ANNUAL LIST	09/11/2006	MADAJ					
BC	FSMC - BANKING INFORMATION REQUESTS	09/11/2006	MADAJ					
A	AUTHORIZATION / APPROVAL	01/18/2000	WICADM					
B	AUTHORIZATION / DENIAL	01/18/2000	WICADM					
C	AUTHORIZATION / NO-ACTION	01/18/2000	WICADM					
D	APPLICATION WAITING LIST	01/18/2000	WICADM					
E	APPLICATION COVER LETTER	01/18/2000	WICADM					
F	UNTIMELY APPLICATION	01/18/2000	WICADM					

Figure: Communication Types

Fields:

- **Comm Type Code** – A code used to uniquely identify the type of communication sent.
- **Description** – The description of the communication type.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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**Communication Types**

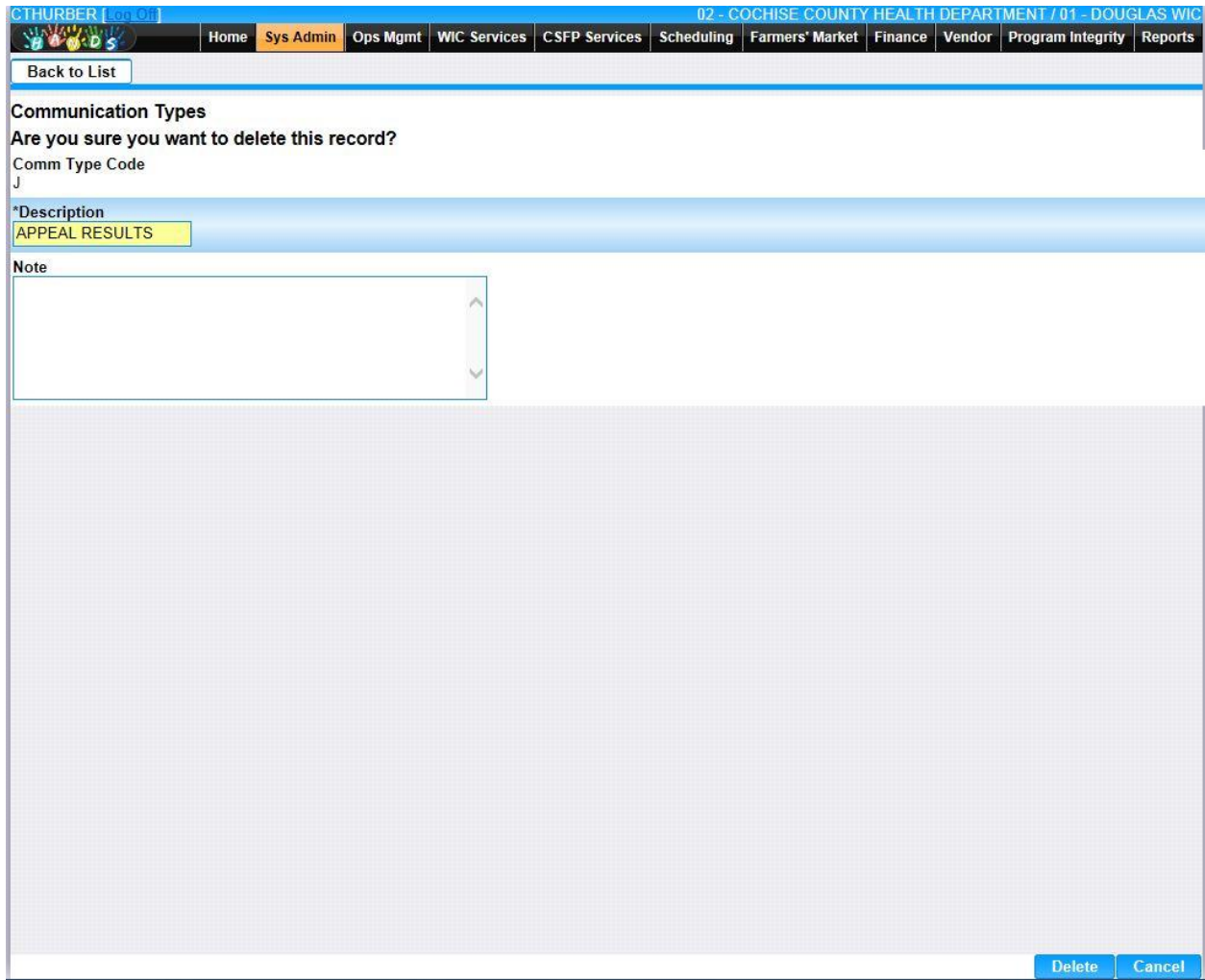
Comm Type Code  
I

\*Description  
ACKNOWLEDGEMENT

Note

Save Reset

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



*Buttons:*



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

The screenshot shows a web application interface for '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. The navigation menu includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. The 'Sys Admin' menu item is highlighted. Below the navigation is a 'Back to List' button. The main content area is titled 'Communication Types' and contains three input fields: '\*Comm Type Code', '\*Description', and a 'Note' text area. The 'Save' and 'Reset' buttons are located at the bottom right of the form.

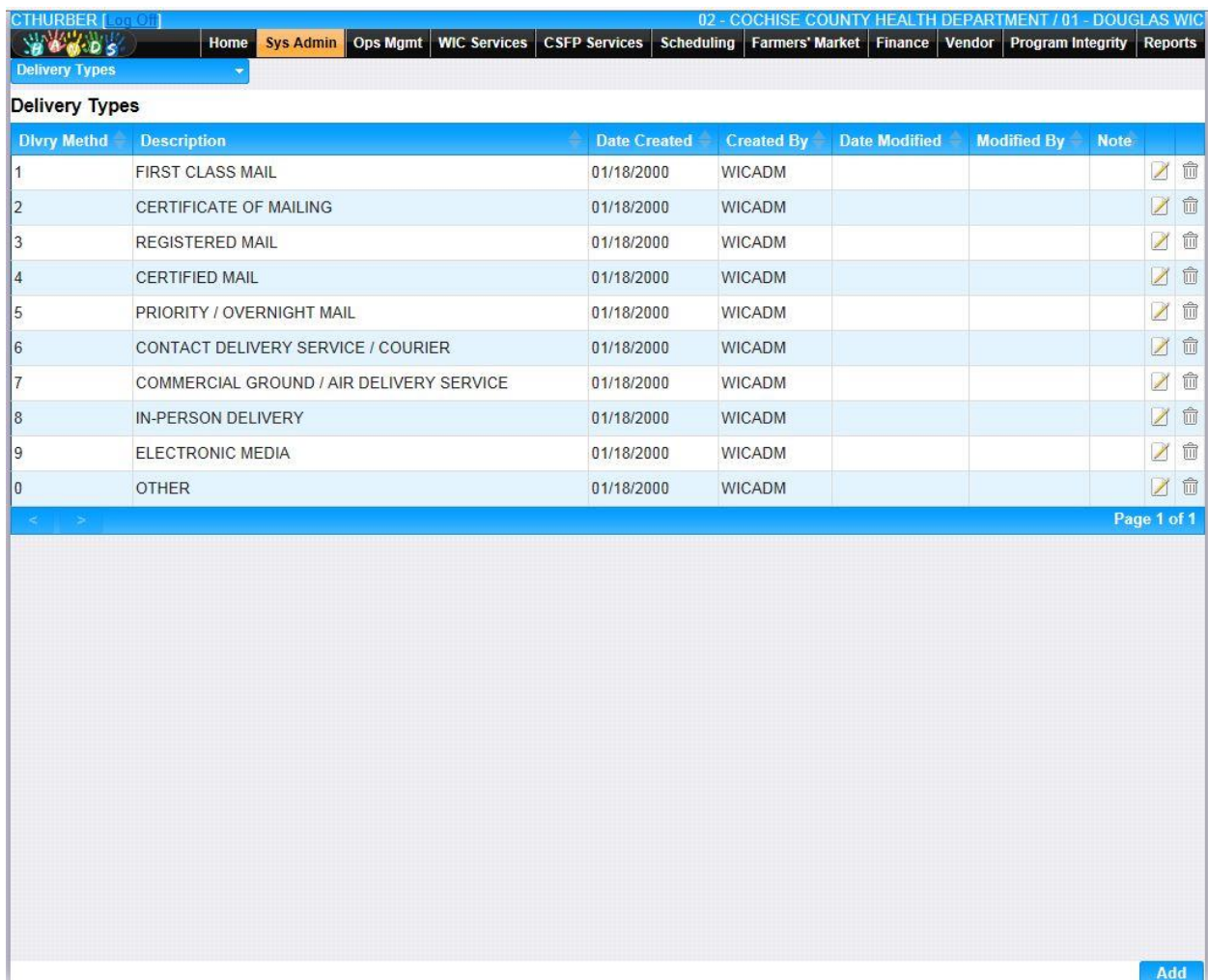
*Calculation(s): None*

*Background Processes: None*

## 12.5 Delivery Types

The Delivery Types Base Table is used under the Communication page. This Base Table is used to populate the Delivery Method Drop Down list when the User is adding a Vendor Communication. This Base Table is also used to select the Delivery Method for Mass Communications. Current records for Communication Types will appear in the Communication Types Grid. The user can add further Communication Types to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Communication Types page.

Navigation Path: Sys Admin / Vendor Base Tables / Delivery Types




Dlvry Methd	Description	Date Created	Created By	Date Modified	Modified By	Note	
1	FIRST CLASS MAIL	01/18/2000	WICADM				
2	CERTIFICATE OF MAILING	01/18/2000	WICADM				
3	REGISTERED MAIL	01/18/2000	WICADM				
4	CERTIFIED MAIL	01/18/2000	WICADM				
5	PRIORITY / OVERNIGHT MAIL	01/18/2000	WICADM				
6	CONTACT DELIVERY SERVICE / COURIER	01/18/2000	WICADM				
7	COMMERCIAL GROUND / AIR DELIVERY SERVICE	01/18/2000	WICADM				
8	IN-PERSON DELIVERY	01/18/2000	WICADM				
9	ELECTRONIC MEDIA	01/18/2000	WICADM				
0	OTHER	01/18/2000	WICADM				

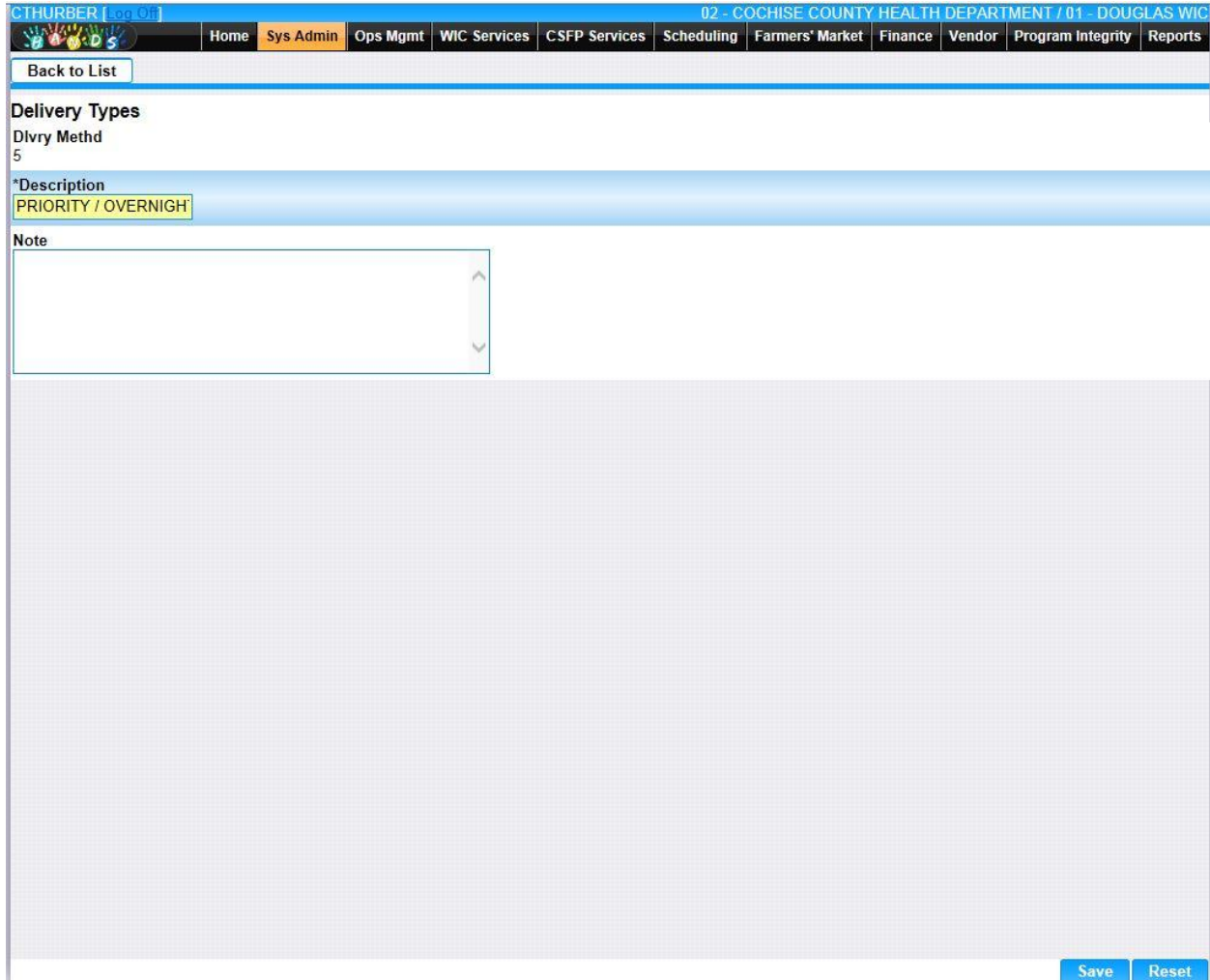
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**Add**

Figure: Delivery Types

Fields:

- **Dlvry Methd** – A code used to uniquely identify the method of delivery used.
- **Description** – The description of the delivery type.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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**Delivery Types**

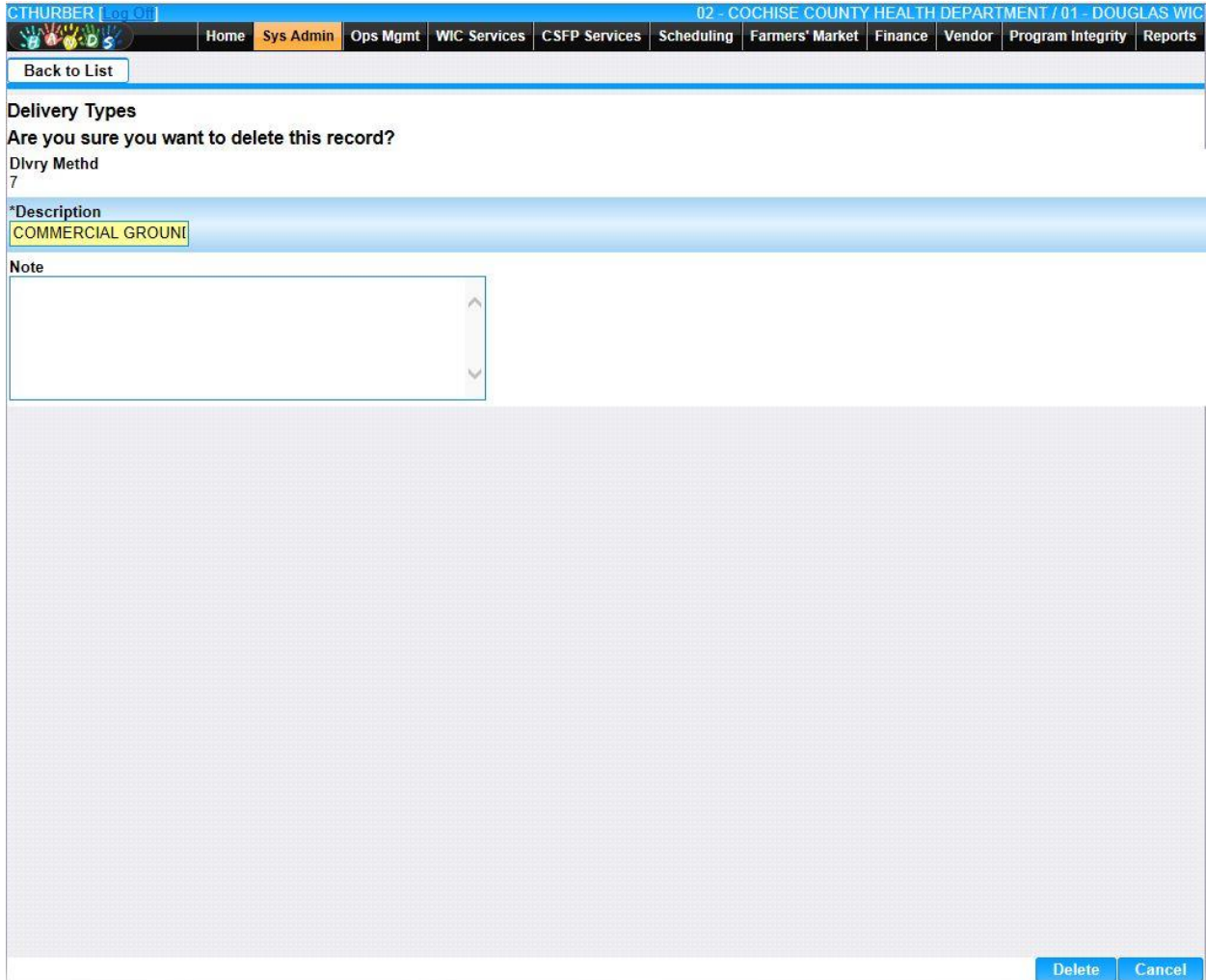
Dlvry Methd  
5

\*Description  
PRIORITY / OVERNIGHT

Note

Save Reset

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





*Buttons:*



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

The screenshot shows a web application interface for adding delivery types. At the top, there is a navigation bar with the following items: CTHURBER [log out], 02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC, Home, Sys Admin (highlighted), Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. Below the navigation bar is a 'Back to List' button. The main content area is titled 'Delivery Types' and contains three input fields: '\*Dlrvy Methd' (a yellow text box), '\*Description' (a blue text box), and 'Note' (a large white text area with a vertical scrollbar). At the bottom right of the form, there are two buttons: 'Save' and 'Reset'.

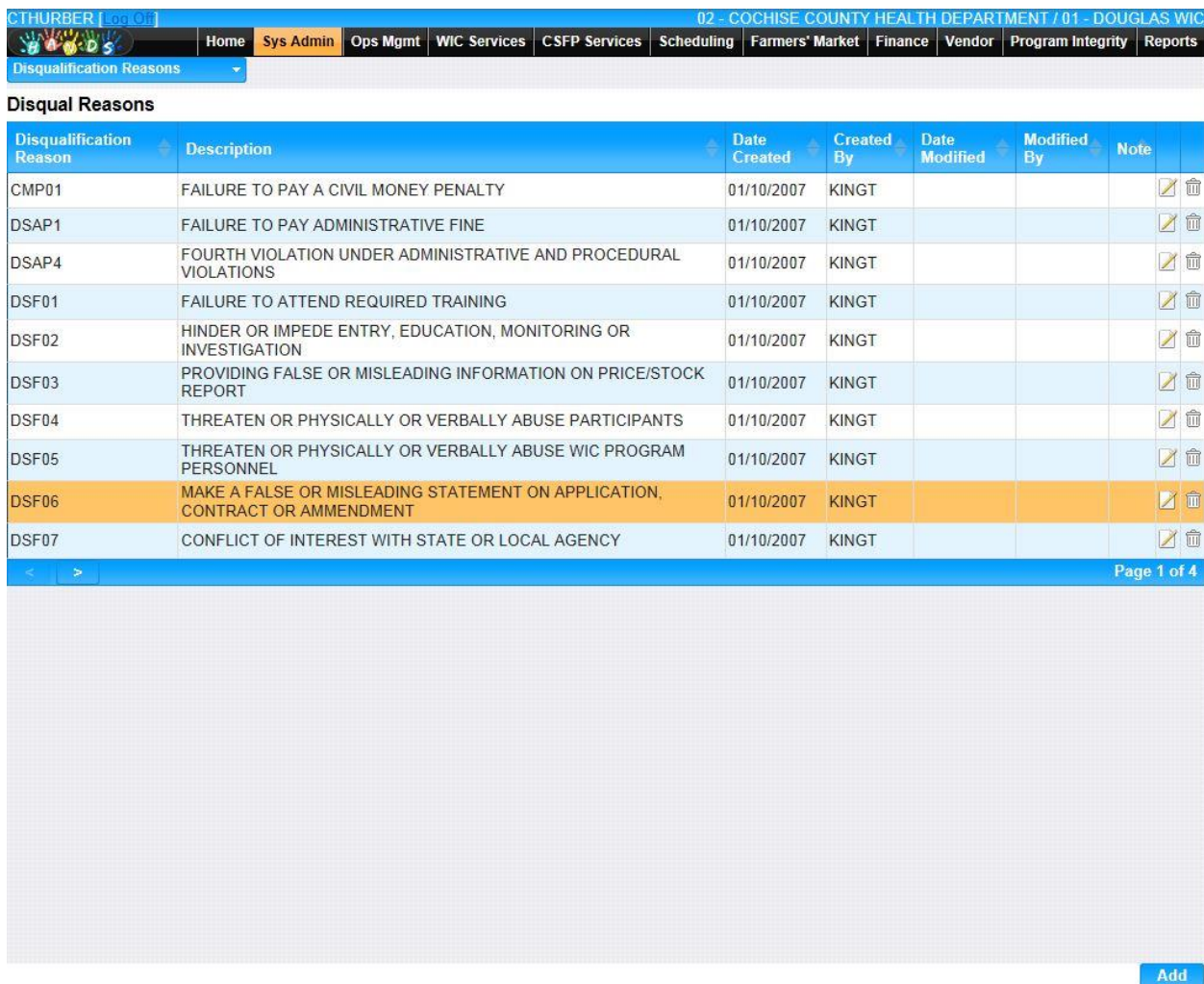
*Calculation(s): None*





















*Background Processes: None*

## 12.6 Disqualification Reasons

The Disqualification Reason Base Table is used under the Demographics | Authorizations page. This Base Table is used to populate the Disqualification Reason Drop Down list when the User disqualifying the Vendor. Current records for Communication Types will appear in the Communication Types Grid. The user can add further Disqualification Reason to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Disqualification Reason page.

*Navigation Path: Sys Admin | Vendor Base Tables | Disqualification Reason*




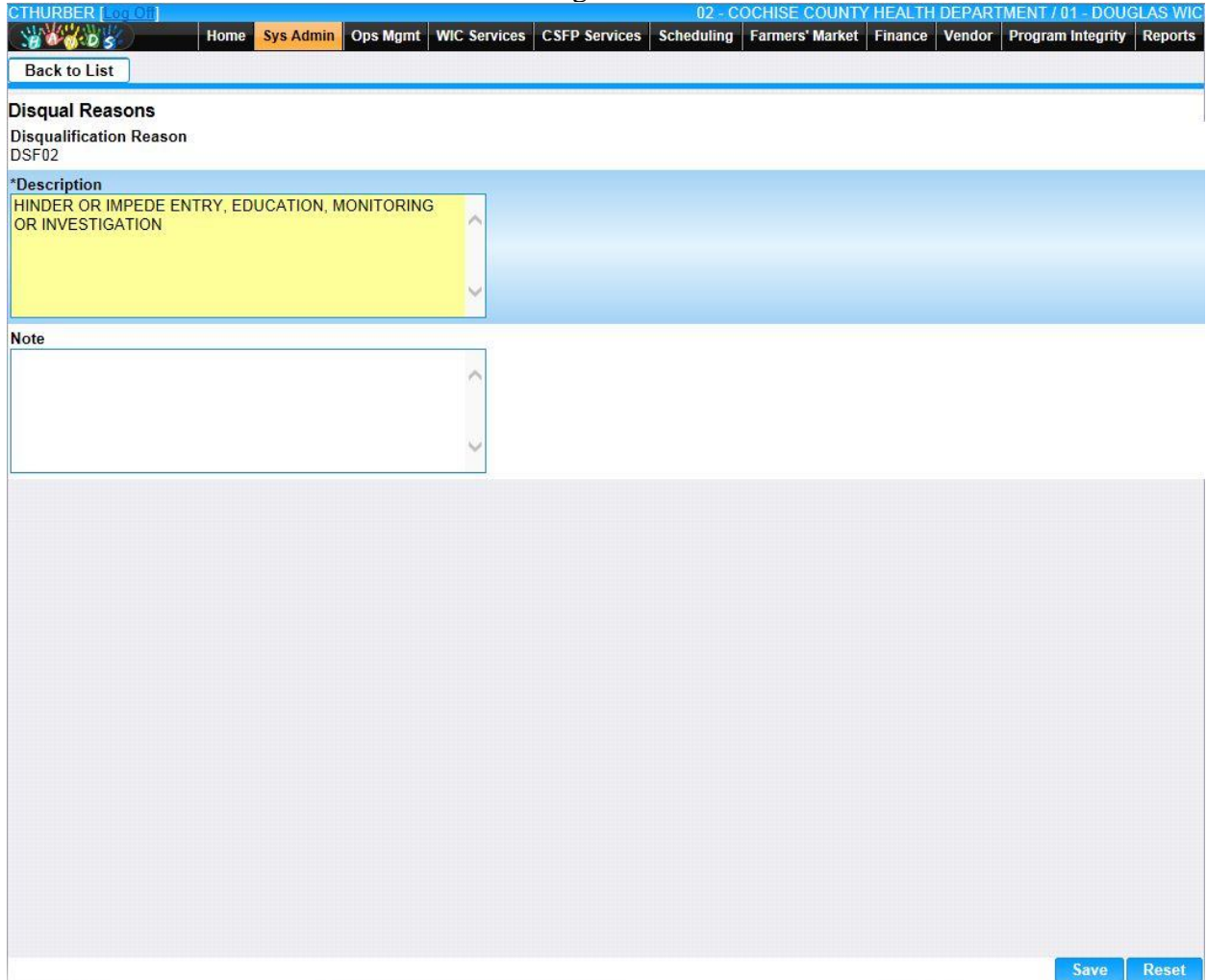
Disqualification Reason	Description	Date Created	Created By	Date Modified	Modified By	Note
CMP01	FAILURE TO PAY A CIVIL MONEY PENALTY	01/10/2007	KINGT			 
DSAP1	FAILURE TO PAY ADMINISTRATIVE FINE	01/10/2007	KINGT			 
DSAP4	FOURTH VIOLATION UNDER ADMINISTRATIVE AND PROCEDURAL VIOLATIONS	01/10/2007	KINGT			 
DSF01	FAILURE TO ATTEND REQUIRED TRAINING	01/10/2007	KINGT			 
DSF02	HINDER OR IMPEDE ENTRY, EDUCATION, MONITORING OR INVESTIGATION	01/10/2007	KINGT			 
DSF03	PROVIDING FALSE OR MISLEADING INFORMATION ON PRICE/STOCK REPORT	01/10/2007	KINGT			 
DSF04	THREATEN OR PHYSICALLY OR VERBALLY ABUSE PARTICIPANTS	01/10/2007	KINGT			 
DSF05	THREATEN OR PHYSICALLY OR VERBALLY ABUSE WIC PROGRAM PERSONNEL	01/10/2007	KINGT			 
DSF06	MAKE A FALSE OR MISLEADING STATEMENT ON APPLICATION, CONTRACT OR AMMENDMENT	01/10/2007	KINGT			 
DSF07	CONFLICT OF INTEREST WITH STATE OR LOCAL AGENCY	01/10/2007	KINGT			 

*Figure : Disqualification Reason*

*Fields:*

- **Disqualification Reason** – The reason the Vendor has been disqualified.

- **Description** – The description of the reason for the disqualification.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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**Disqual Reasons**

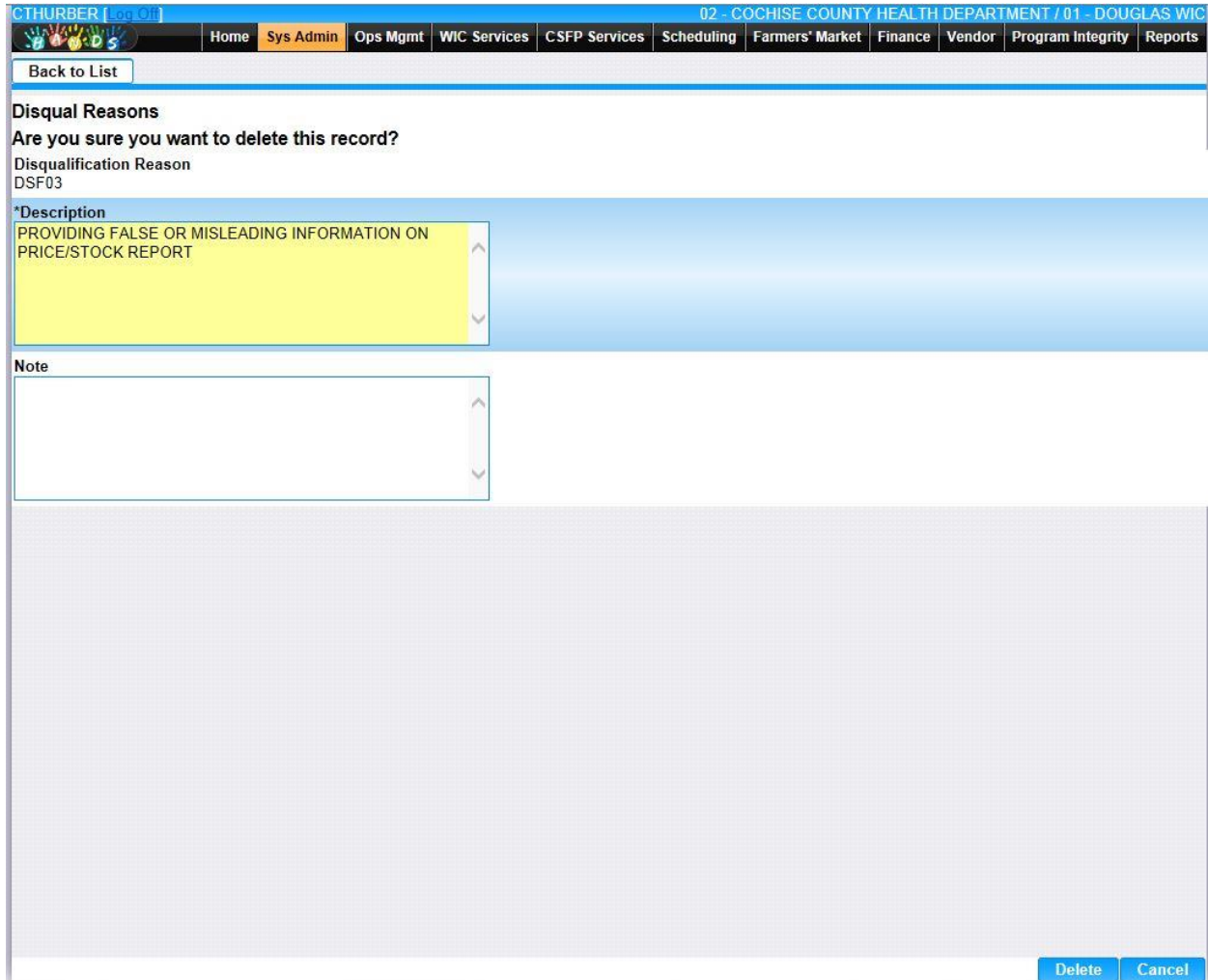
Disqualification Reason  
DSF02

\*Description  
HINDER OR IMPEDE ENTRY, EDUCATION, MONITORING OR INVESTIGATION

Note

Save Reset

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



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**Disqual Reasons**

Are you sure you want to delete this record?

Disqualification Reason  
DSF03

\*Description  
PROVIDING FALSE OR MISLEADING INFORMATION ON PRICE/STOCK REPORT

Note

Delete Cancel

*Buttons:*



- **Add** – When selected focus is passed to the Add Disqualification Reason page.

The screenshot shows a web application interface for adding a disqualification reason. At the top, there is a navigation bar with the user 'CTHURBER [log off]' and the system name '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. Below this is a menu with 'Home', 'Sys Admin' (highlighted), 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. A 'Back to List' button is located below the menu. The main content area is titled 'Disqual Reasons' and contains three input fields: '\*Disqualification Reason' (a small text box), '\*Description' (a larger text area), and 'Note' (a text area). At the bottom right of the form, there are 'Save' and 'Reset' buttons.

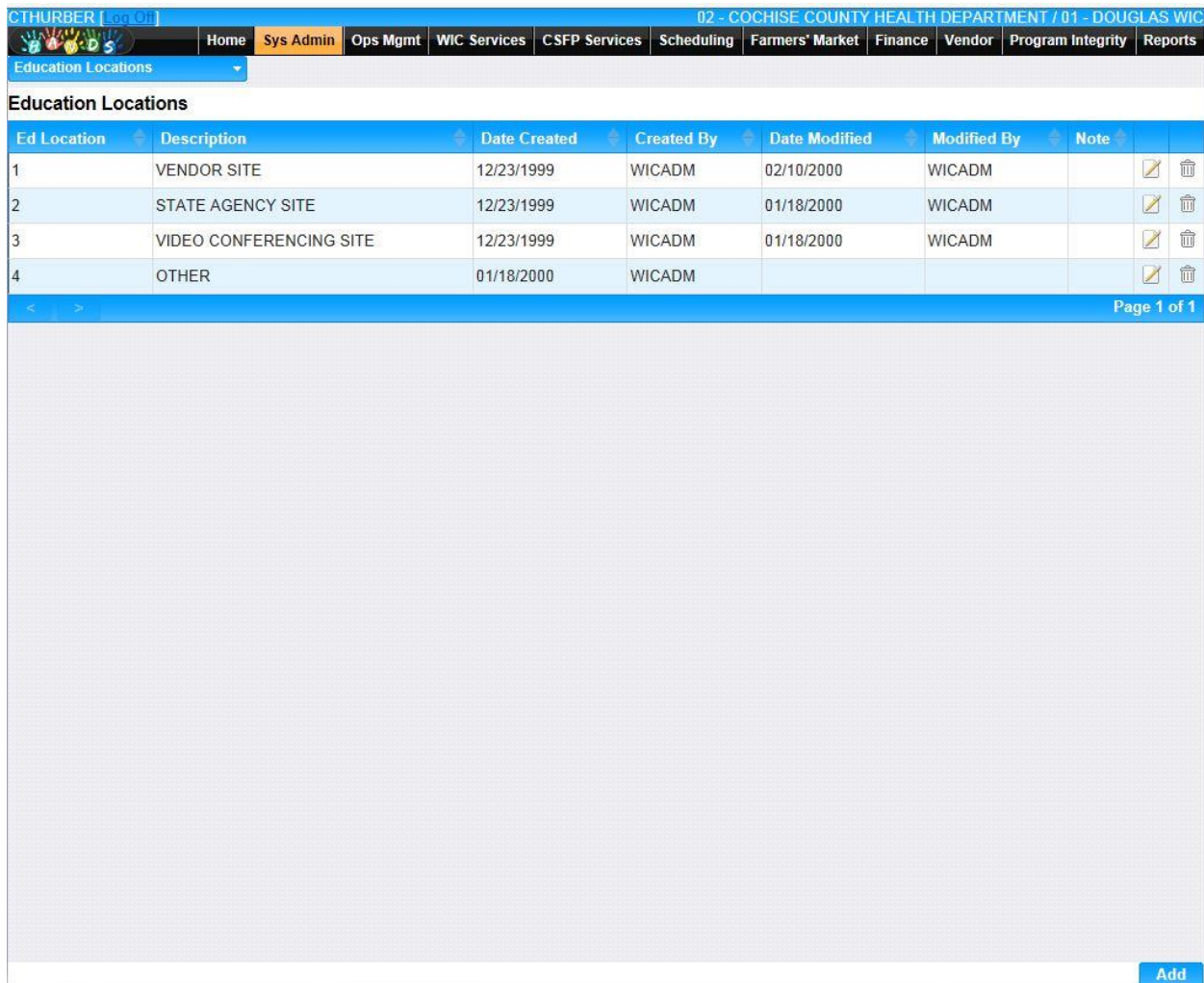
*Calculation(s): None*









*Background Processes: None*

### 12.7 Education Locations

The Education Locations Base Table is used under the Educations page. This Base Table is used to populate the Education Location Drop Down list when the User is adding a Vendor Education. This Base Table is also used to select the Education Location for Group Educations. Current records for Education Locations will appear in the Education Locations Grid. The user can add further Education Locations to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Education Locations page.

*Navigation Path: Sys Admin / Vendor Base Tables / Education Locations*




Ed Location	Description	Date Created	Created By	Date Modified	Modified By	Note		
1	VENDOR SITE	12/23/1999	WICADM	02/10/2000	WICADM			
2	STATE AGENCY SITE	12/23/1999	WICADM	01/18/2000	WICADM			
3	VIDEO CONFERENCING SITE	12/23/1999	WICADM	01/18/2000	WICADM			
4	OTHER	01/18/2000	WICADM					

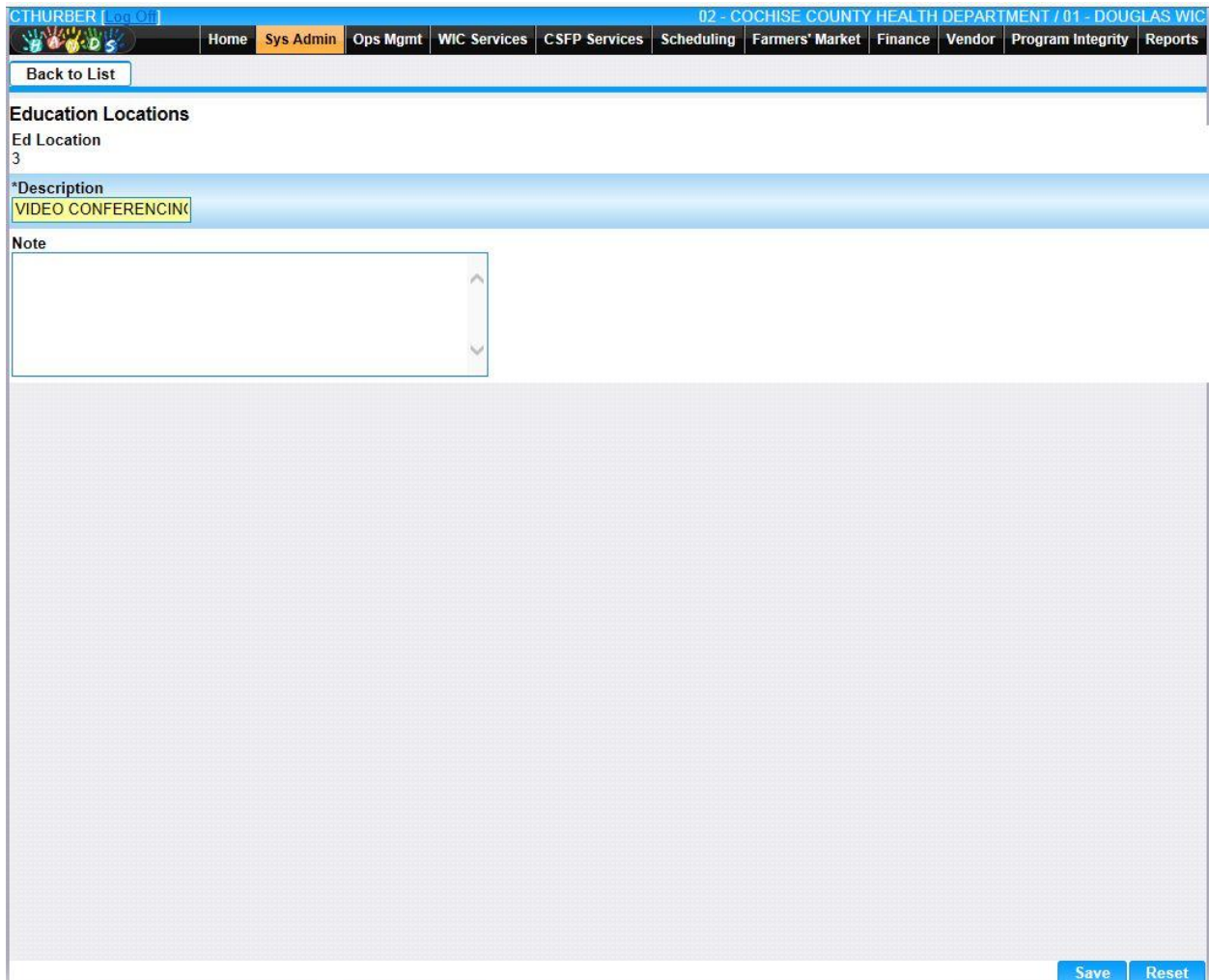
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[Add](#)

*Figure: Education Locations*

*Fields:*

- **Ed Location** – A code used to uniquely identify the location that the education was provided.
- **Description** – The description of the education location.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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**Education Locations**

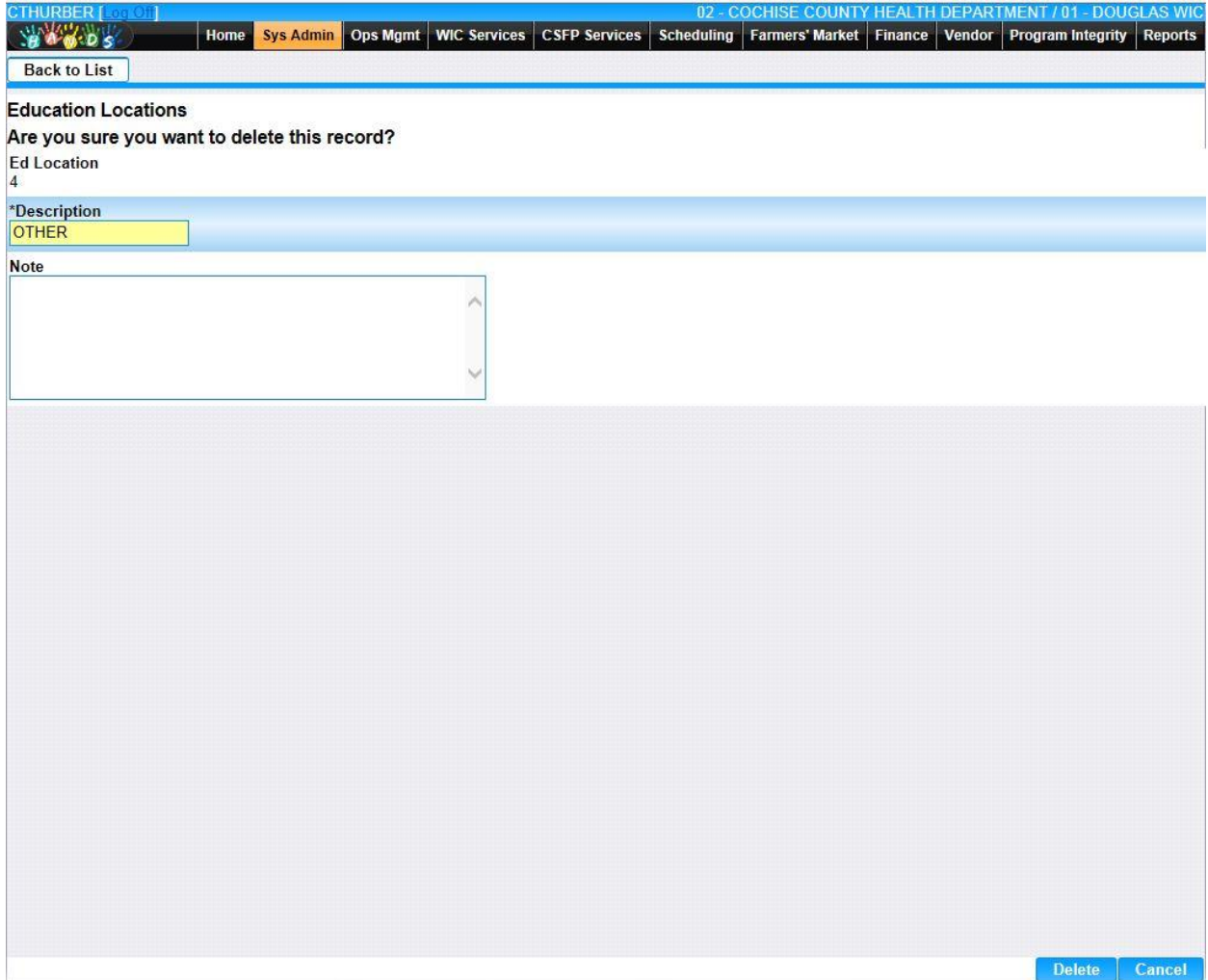
Ed Location  
3

\*Description  
VIDEO CONFERENCING

Note

Save Reset

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



The screenshot shows a web application interface for deleting an Education Location record. At the top, there is a navigation bar with the user name 'CTHURBER [Log Out]' and the page title '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. Below the navigation bar is a menu with options: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. A 'Back to List' button is located below the menu. The main content area is titled 'Education Locations' and contains the question 'Are you sure you want to delete this record?'. Below this question, the record details are displayed: 'Ed Location' with the value '4', and '\*Description' with the value 'OTHER'. A 'Note' field is also present, which is currently empty. At the bottom right of the form, there are two buttons: 'Delete' and 'Cancel'.



*Buttons:*



- **Add** – When selected focus is passed to the Add Education Locations page.

The screenshot shows a web application interface for adding education locations. At the top, there is a navigation bar with the user name 'CTHURBER [log off]' and the system title '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. Below this is a menu with options: Home, Sys Admin (highlighted), Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. A 'Back to List' button is located below the menu. The main content area is titled 'Education Locations' and contains three input fields: '\*Ed Location' (a yellow text box), '\*Description' (a blue text box), and 'Note' (a white text area with a vertical scrollbar). At the bottom right of the form, there are two buttons: 'Save' and 'Reset'.

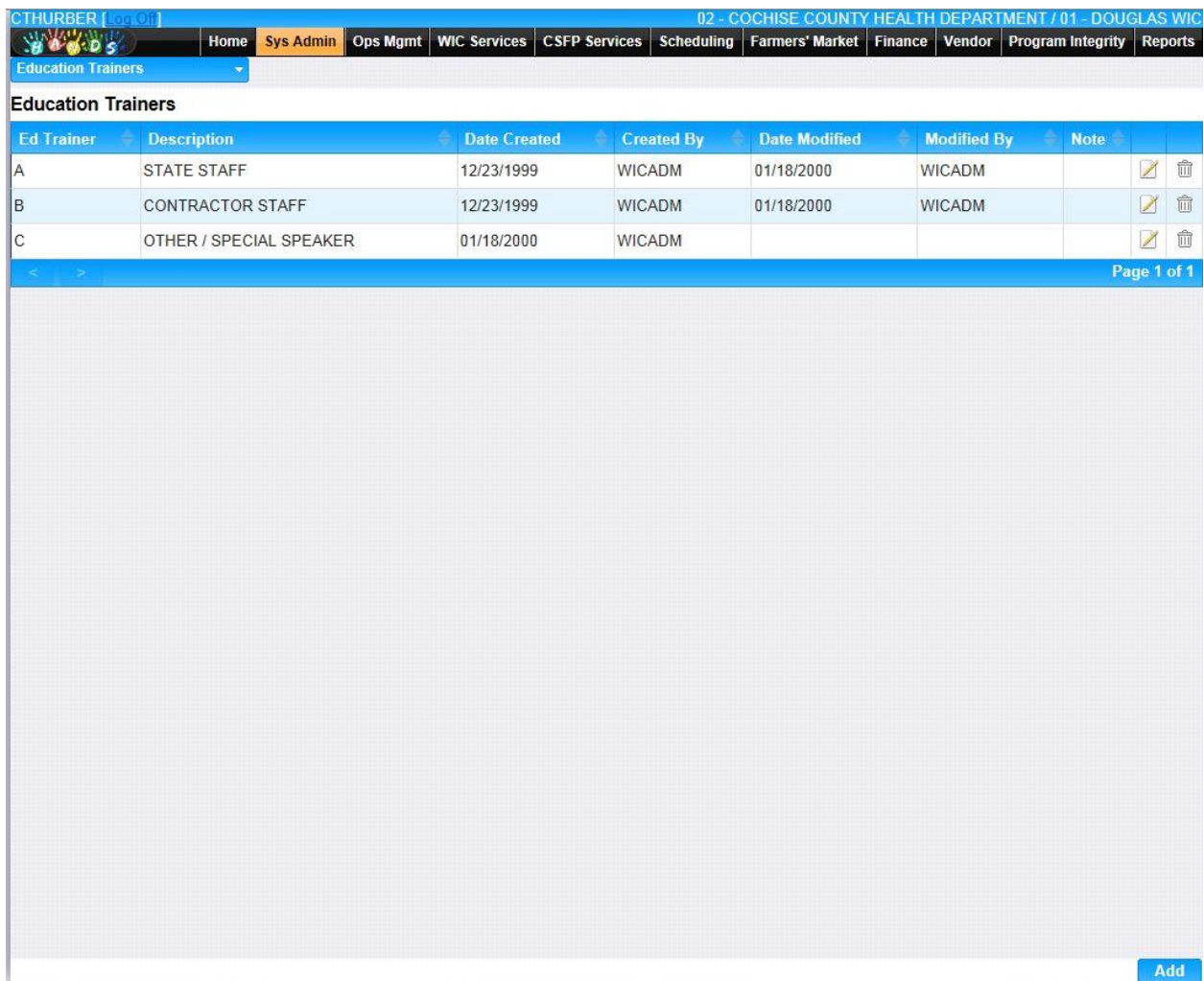
*Calculation(s): None*







*Background Processes: None*

## 12.8 Education Trainers

The Education Trainers Base Table is used under the Educations page. This Base Table is used to populate the Education Trainers Drop Down list when the User is adding a Vendor Education. This Base Table is also used to select the Education Trainers for Group Educations. Current records for Education Trainers will appear in the Education Trainers Grid. The user can add further Education Trainers to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Education Trainers page.

*Navigation Path: Sys Admin / Vendor Base Tables / Education Trainers*




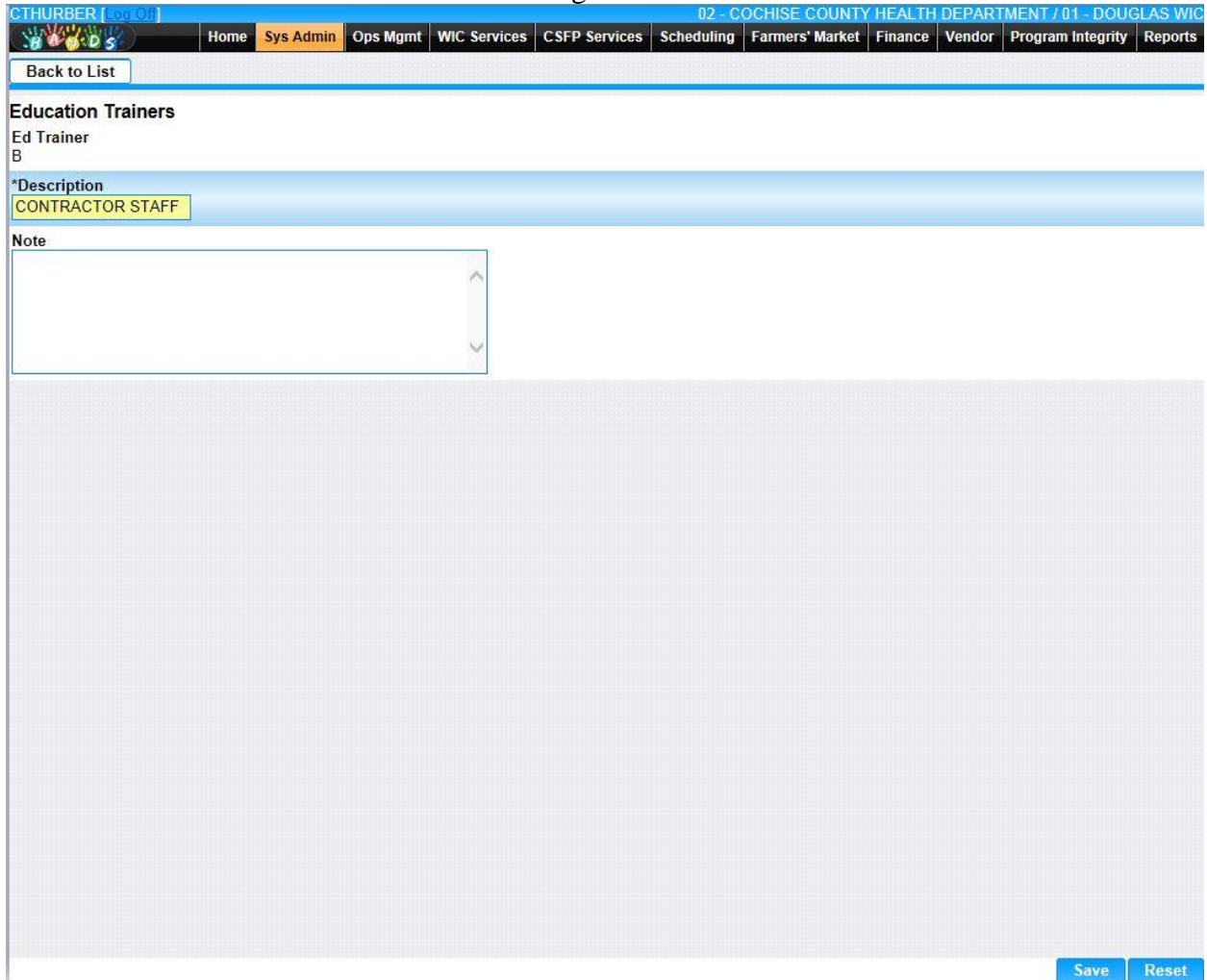
Ed Trainer	Description	Date Created	Created By	Date Modified	Modified By	Note	
A	STATE STAFF	12/23/1999	WICADM	01/18/2000	WICADM		 
B	CONTRACTOR STAFF	12/23/1999	WICADM	01/18/2000	WICADM		 
C	OTHER / SPECIAL SPEAKER	01/18/2000	WICADM				 

*Figure: Education Trainers*

*Fields:*

- **Ed Trainer** – A code used to uniquely identify the trainer that presented the education.
- **Description** – The description of the education trainer.

- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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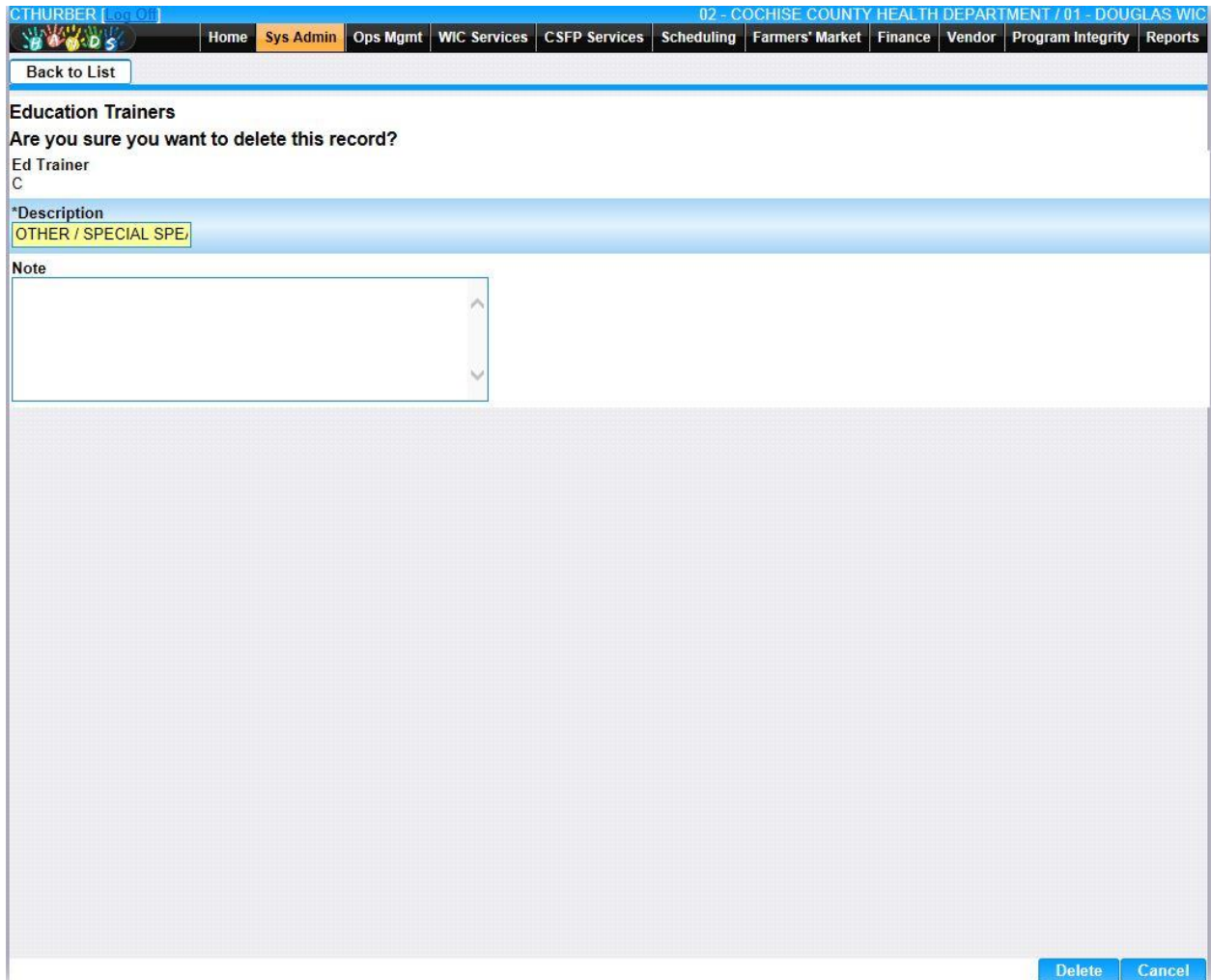
**Education Trainers**  
Ed Trainer  
B

\*Description  
CONTRACTOR STAFF

Note

Save Reset

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



*Buttons:*



- **Add** – When selected focus is passed to the Add Education Trainers page.

The screenshot shows a web application interface for adding education trainers. At the top, there is a navigation bar with the user name 'CTHURBER [log off]' and the system title '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. Below this is a menu with various options: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. A 'Back to List' button is located below the menu. The main content area is titled 'Education Trainers' and contains three input fields: '\*Ed Trainer' (highlighted in yellow), '\*Description' (highlighted in yellow), and a 'Note' field (a text area with a scrollbar). At the bottom right of the form are 'Save' and 'Reset' buttons.

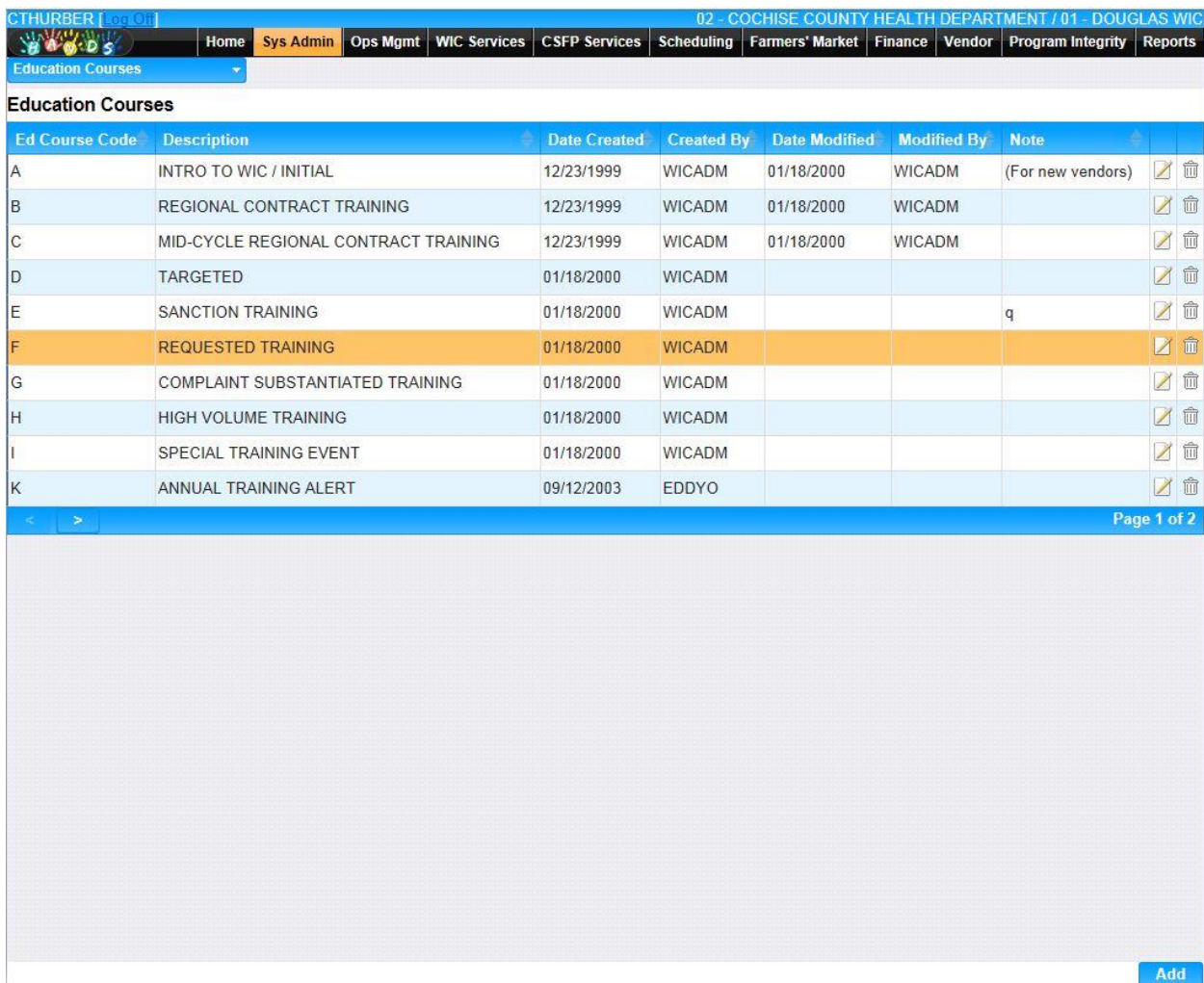
*Calculation(s): None*

*Background Processes: None*

### 12.9 Education Courses

The Education Courses Base Table is used under the Educations page. This Base Table is used to populate the Education Courses Drop Down list when the User is adding a Vendor Education. This Base Table is also used to select the Education Courses for Group Educations. Current records for Education Courses will appear in the Education Courses Grid. The user can add further Education Courses to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Education Courses page.

Navigation Path: Sys Admin / Vendor Base Tables / Education Courses




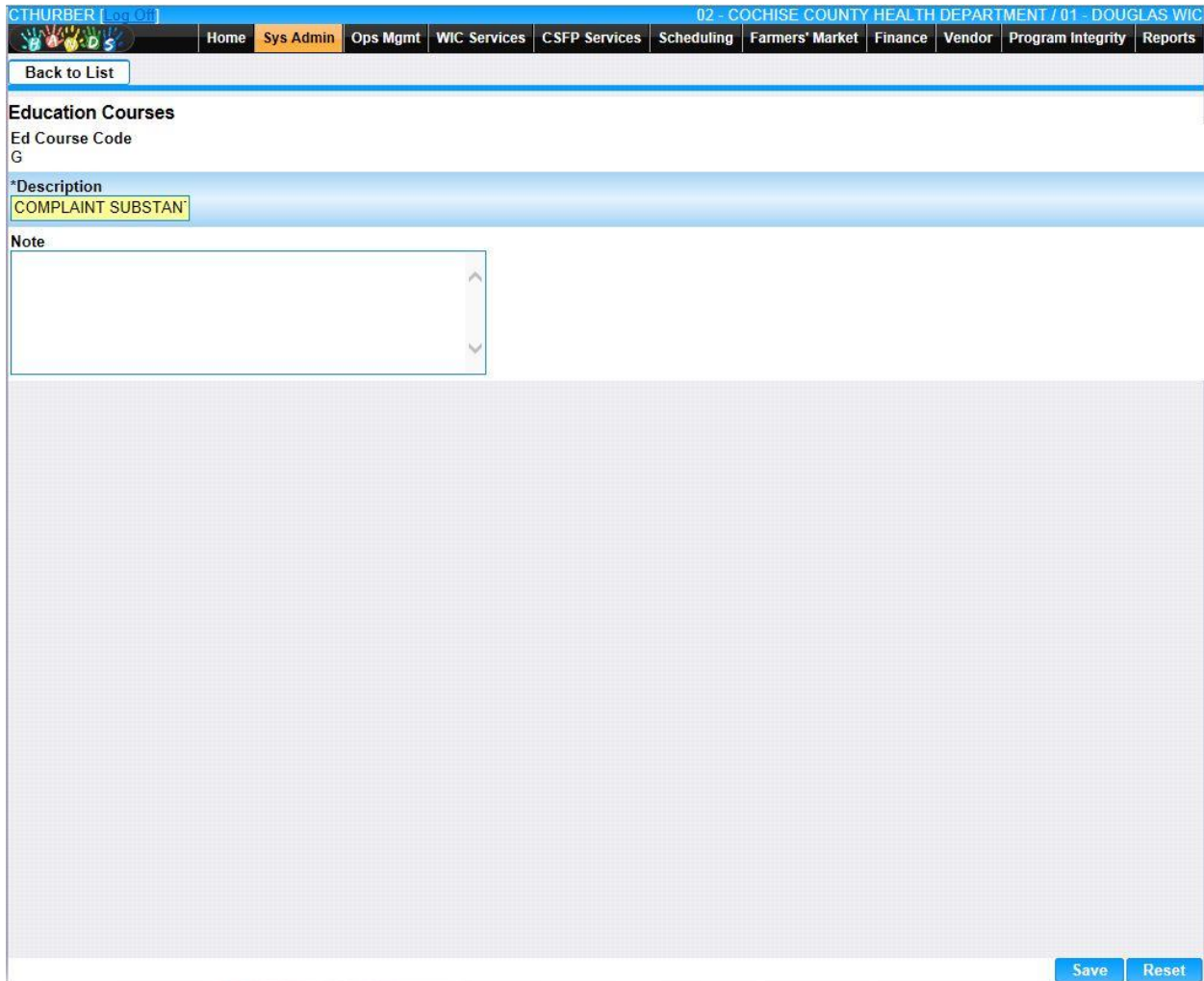
Ed Course Code	Description	Date Created	Created By	Date Modified	Modified By	Note		
A	INTRO TO WIC / INITIAL	12/23/1999	WICADM	01/18/2000	WICADM	(For new vendors)		
B	REGIONAL CONTRACT TRAINING	12/23/1999	WICADM	01/18/2000	WICADM			
C	MID-CYCLE REGIONAL CONTRACT TRAINING	12/23/1999	WICADM	01/18/2000	WICADM			
D	TARGETED	01/18/2000	WICADM					
E	SANCTION TRAINING	01/18/2000	WICADM			q		
F	REQUESTED TRAINING	01/18/2000	WICADM					
G	COMPLAINT SUBSTANTIATED TRAINING	01/18/2000	WICADM					
H	HIGH VOLUME TRAINING	01/18/2000	WICADM					
I	SPECIAL TRAINING EVENT	01/18/2000	WICADM					
K	ANNUAL TRAINING ALERT	09/12/2003	EDDYO					

Figure: Education Courses

Fields:

- **Ed Course Code** – A code used to uniquely identify the course that was presented.

- **Description** – The description of the education course.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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**Education Courses**

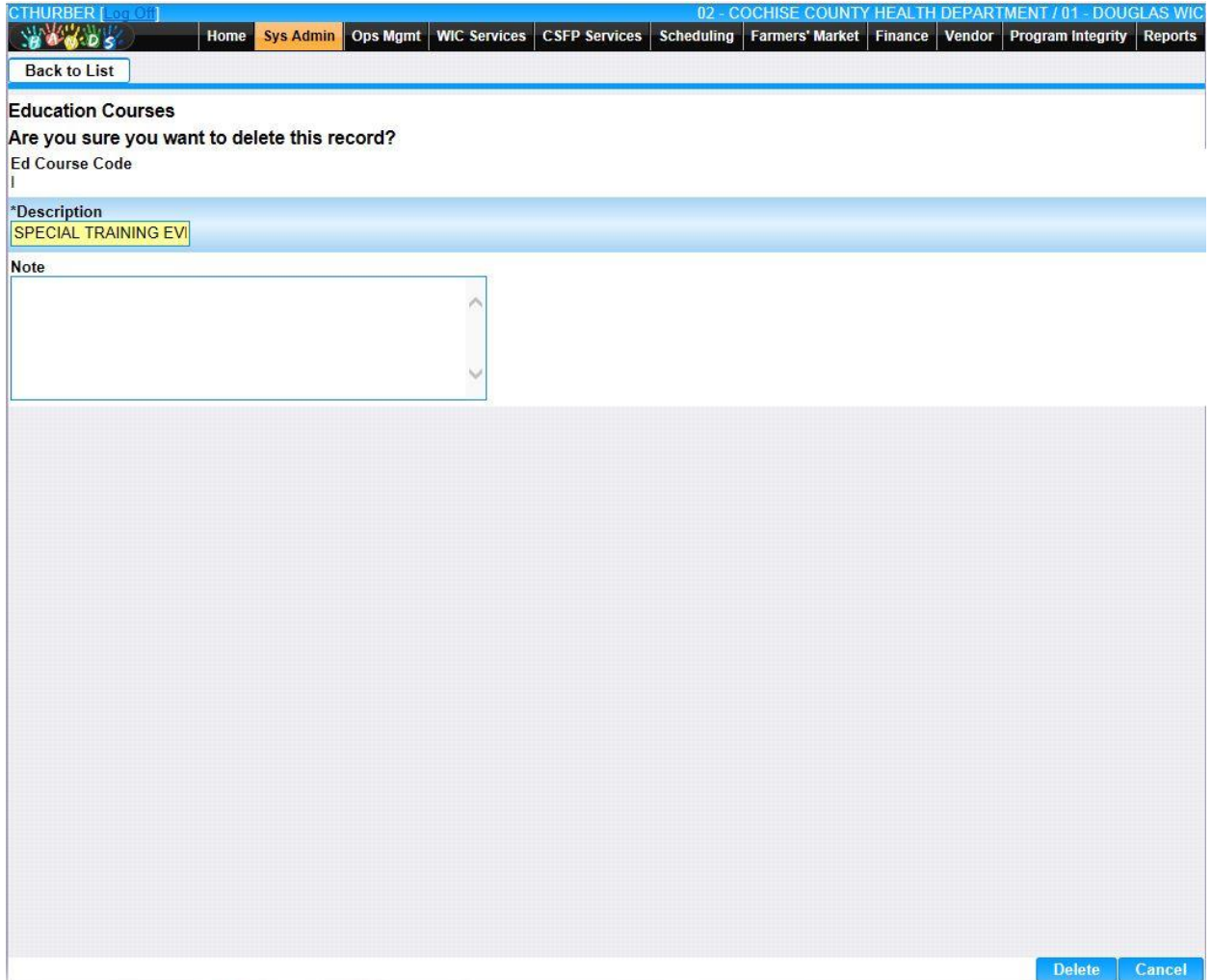
Ed Course Code  
G

\*Description  
COMPLAINT SUBSTAN

Note

Save Reset

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





*Buttons:*



- **Add** – When selected focus is passed to the Add Education Courses page.

The screenshot shows a web application interface for adding education courses. At the top, there is a navigation bar with the user name 'CTHURBER' and a 'Log Off' link. The main navigation menu includes 'Home', 'Sys Admin' (highlighted), 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. Below the navigation is a 'Back to List' button. The main content area is titled 'Education Courses' and contains three input fields: '\*Ed Course Code', '\*Description', and a 'Note' text area. The 'Save' and 'Reset' buttons are located at the bottom right of the form.

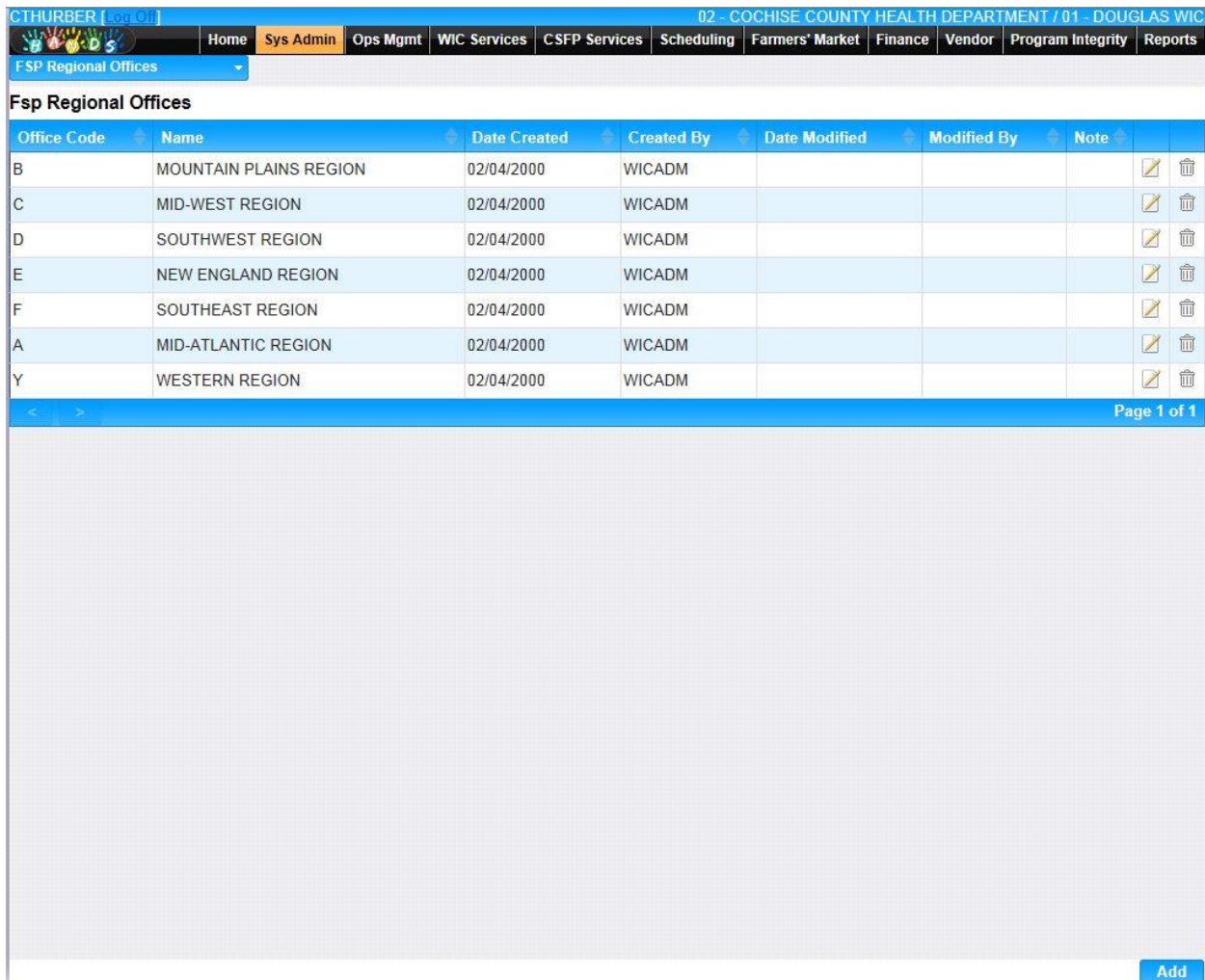
*Calculation(s): None*

*Background Processes: None*

### 12.10 FSP Regional Offices

The FSP Regional Offices Base Table is used under the SNAP page. This Base Table is used to populate the Regional Office Code Drop Down list when the User is adding a Vendor. Current records for FSP Regional Offices will appear in the FSP Regional Offices Grid. The user can add further FSP Regional Offices to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the FSP Regional Offices page.

Navigation Path: Sys Admin | Vendor Base Tables | FSP Regional Offices


















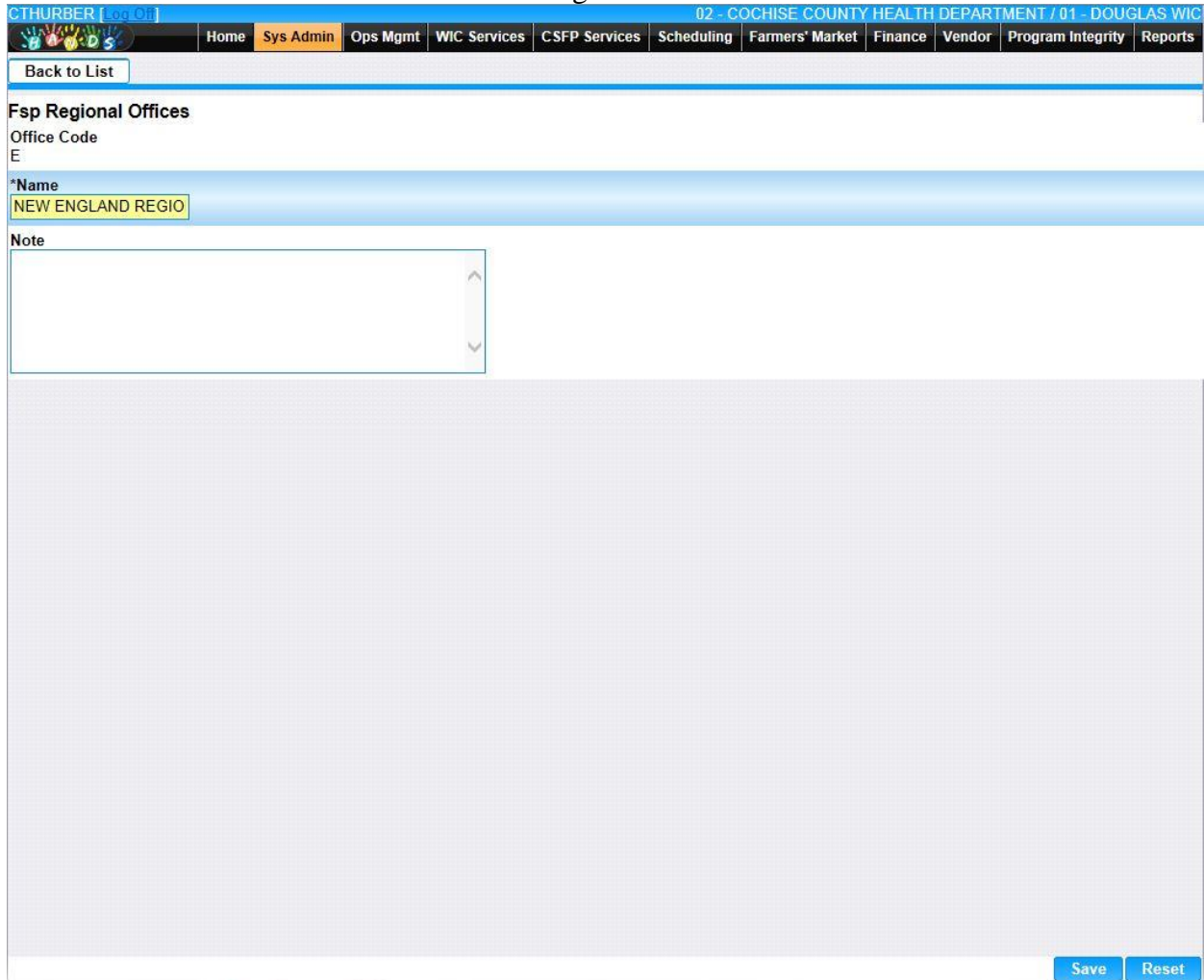
Office Code	Name	Date Created	Created By	Date Modified	Modified By	Note		
B	MOUNTAIN PLAINS REGION	02/04/2000	WICADM					
C	MID-WEST REGION	02/04/2000	WICADM					
D	SOUTHWEST REGION	02/04/2000	WICADM					
E	NEW ENGLAND REGION	02/04/2000	WICADM					
F	SOUTHEAST REGION	02/04/2000	WICADM					
A	MID-ATLANTIC REGION	02/04/2000	WICADM					
Y	WESTERN REGION	02/04/2000	WICADM					

Figure: FSP Regional Offices

Fields:

- **Office Code** – A code used to uniquely identify the Food Stamps Program Regional office.
- **Name** – The description of the Food Stamps Program Regional office.

- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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**Fsp Regional Offices**

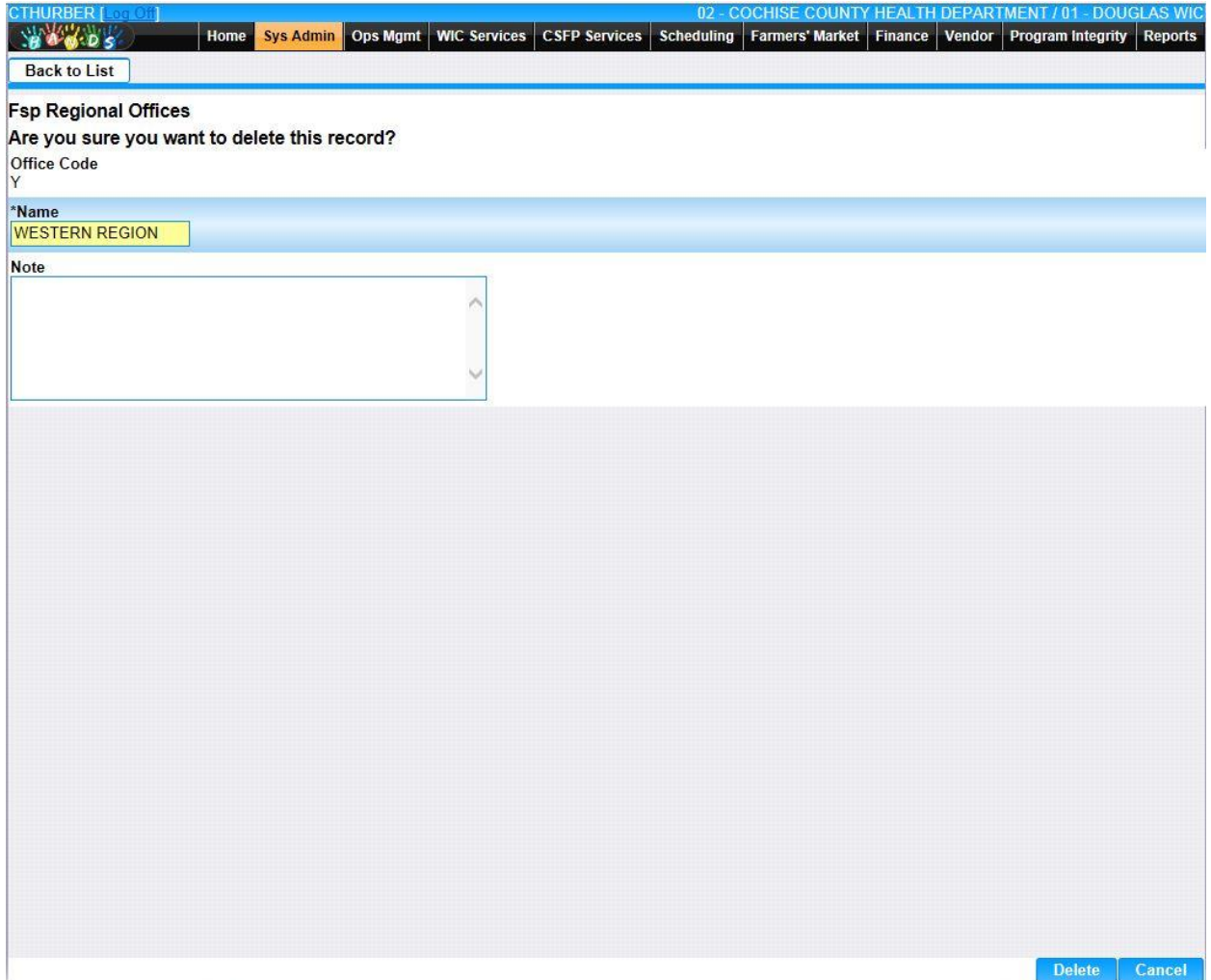
Office Code  
E

\*Name  
NEW ENGLAND REGIO

Note

Save Reset

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



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**Fsp Regional Offices**

**Are you sure you want to delete this record?**

Office Code  
Y

\*Name  
WESTERN REGION

Note

Delete Cancel

*Buttons:*

- **Add** – When selected focus is passed to the Add FSP Regional Office page.

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**Fsp Regional Offices**

\*Office Code

\*Name



Note

Save Reset

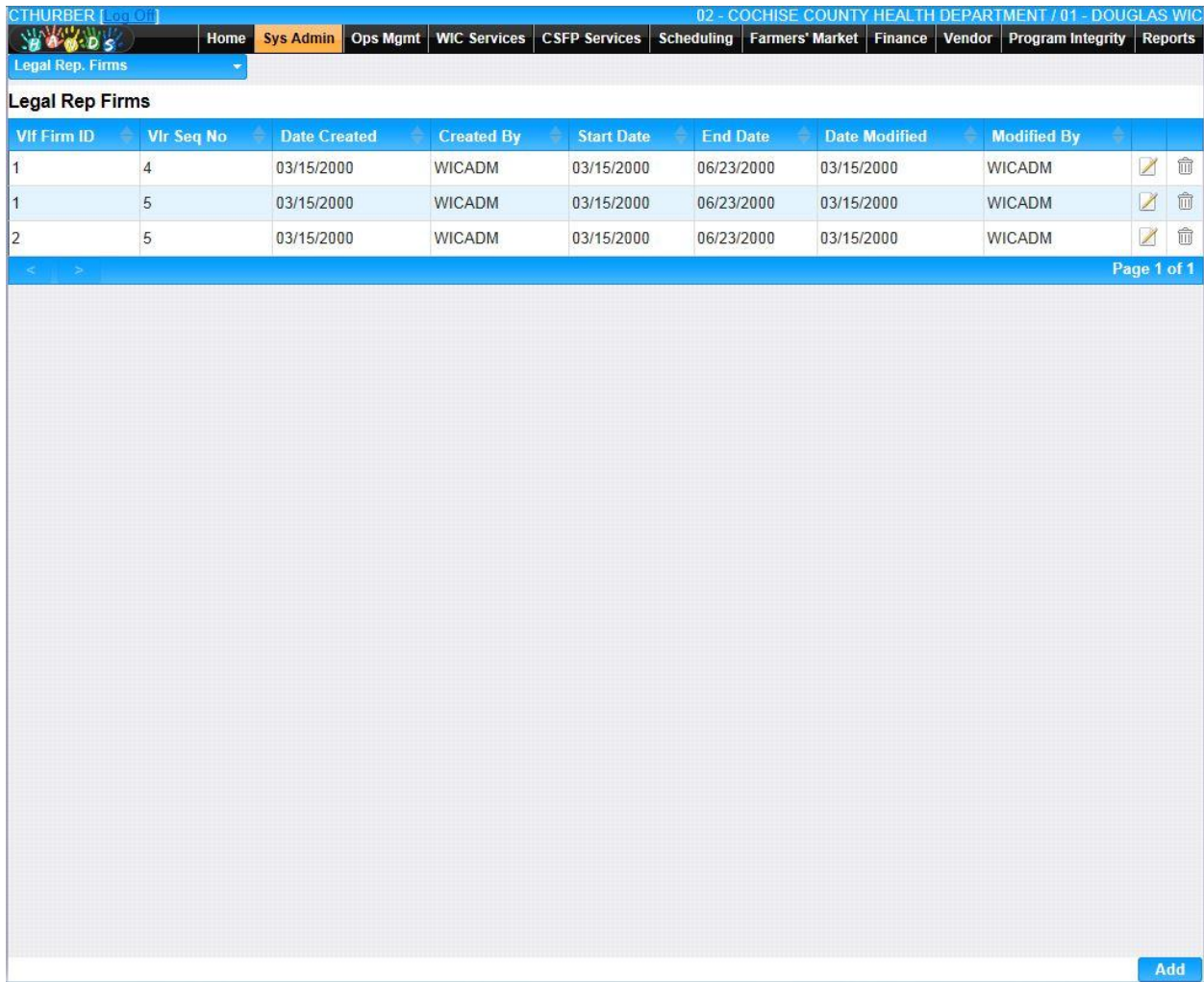
*Calculation(s): None*







*Background Processes: None*

### 12.11 Legal Rep Firms

Current records for Legal Rep Firms will appear in the Legal Rep Firms Grid. The user can add further Legal Rep Firms to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Legal Rep Firms page.

*Navigation Path: Sys Admin / Vendor Base Tables /Legal Rep Firms*




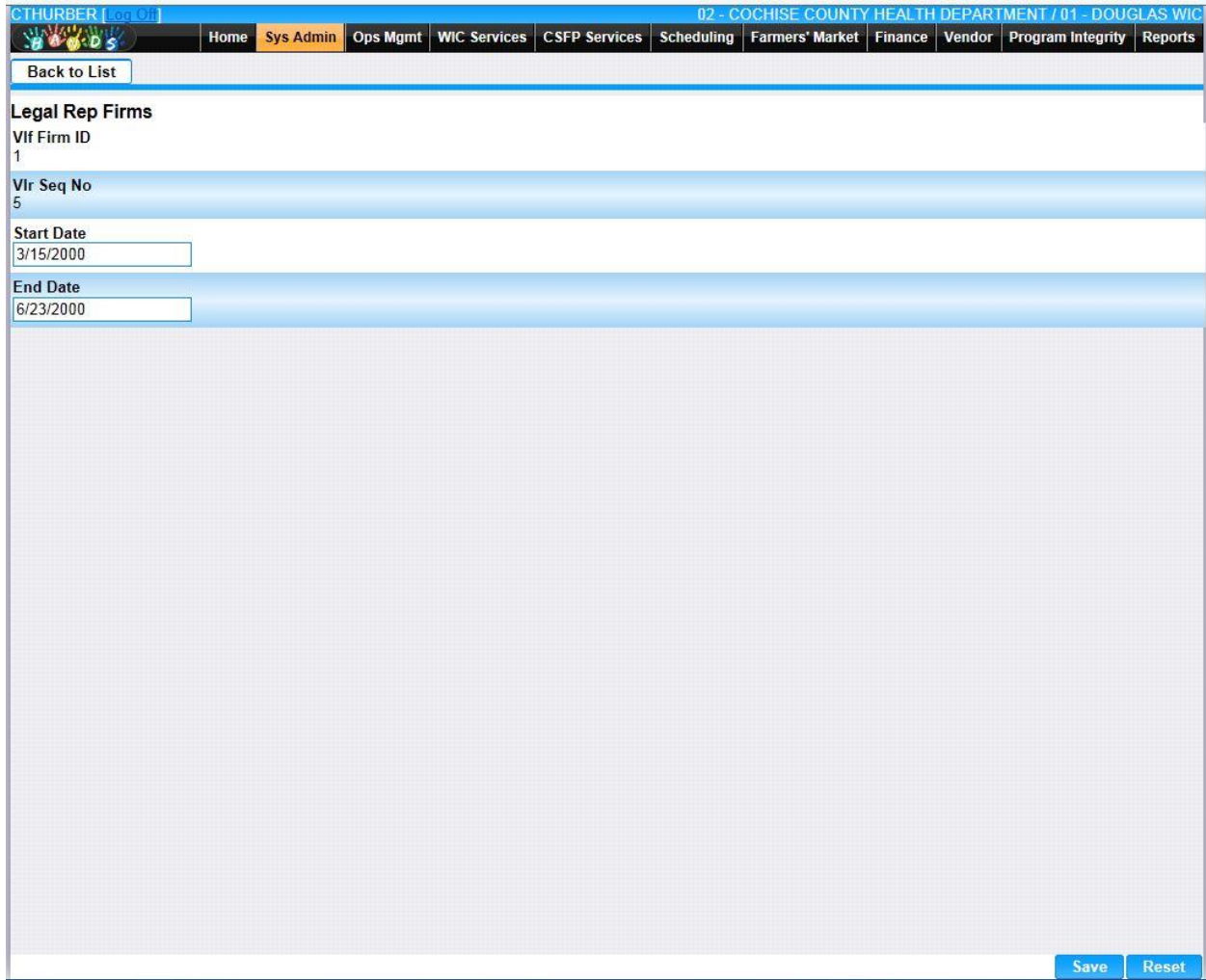
Vlf Firm ID	Vlr Seq No	Date Created	Created By	Start Date	End Date	Date Modified	Modified By		
1	4	03/15/2000	WICADM	03/15/2000	06/23/2000	03/15/2000	WICADM		
1	5	03/15/2000	WICADM	03/15/2000	06/23/2000	03/15/2000	WICADM		
2	5	03/15/2000	WICADM	03/15/2000	06/23/2000	03/15/2000	WICADM		

*Figure: Legal Rep Firms*

*Fields:*

- **Vlf Firm ID** – The unique identifier of the Legal Firm.
- **Vlr Seq No** – A system generated unique identifier that represents the Legal Firm.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.

- **Start Date** – The date the Legal Representative began working for the associate.
- **End Date** – The date the Legal Representative stopped working for the associate.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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**Legal Rep Firms**


Vif Firm ID  
1

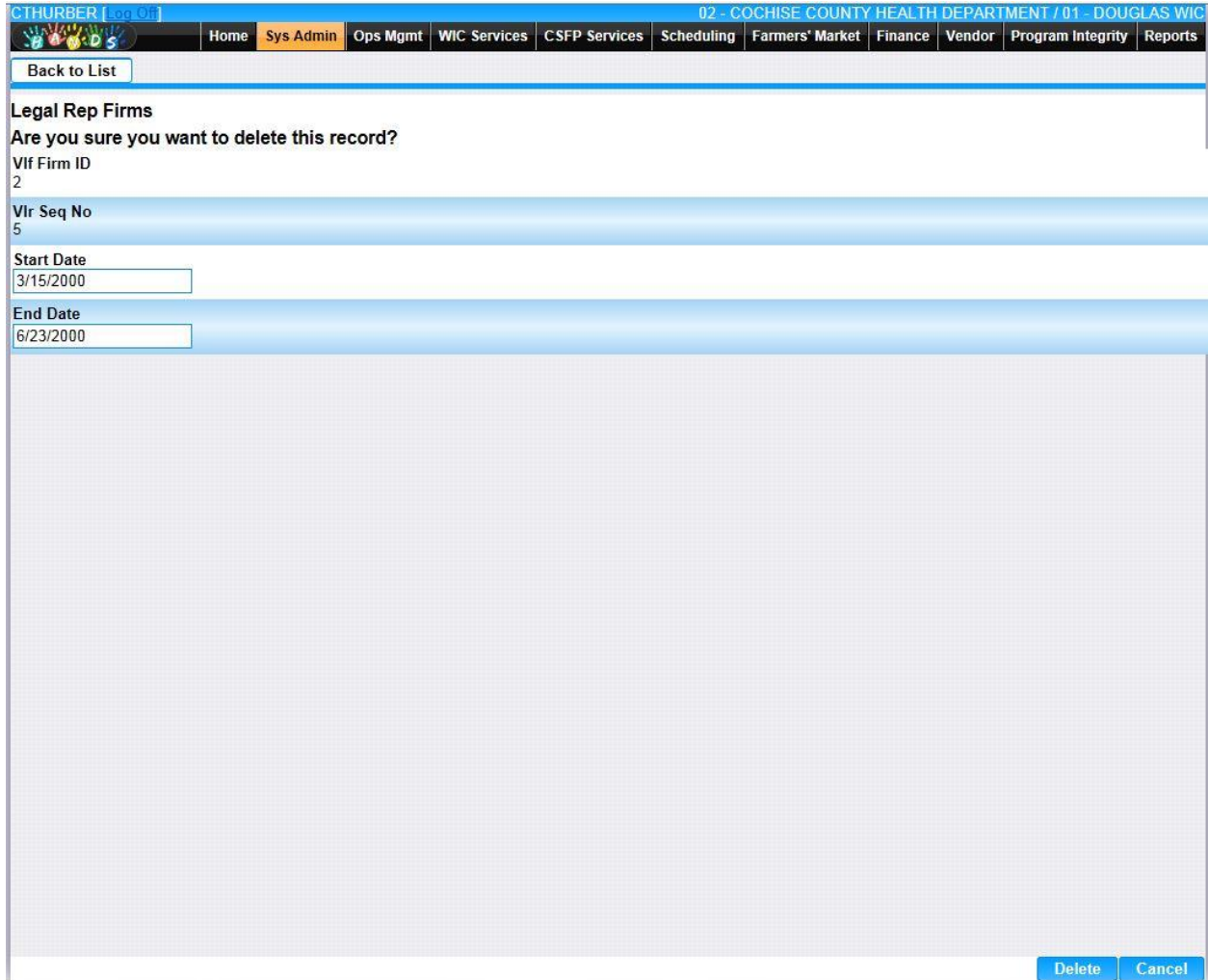
Vir Seq No  
5

Start Date  
3/15/2000

End Date  
6/23/2000

Save Reset

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



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**Legal Rep Firms**

Are you sure you want to delete this record?

Vlf Firm ID  
2

Vlr Seq No  
5

Start Date  
3/15/2000

End Date  
6/23/2000

Delete Cancel



*Buttons:*

- **Add** – When selected focus is passed to the Add Legal Rep Firms page.

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**Legal Rep Firms**

\*Vif Firm ID  
NOT SET

\*Vlr Seq No  
NOT SET

Start Date



End Date

Save Reset

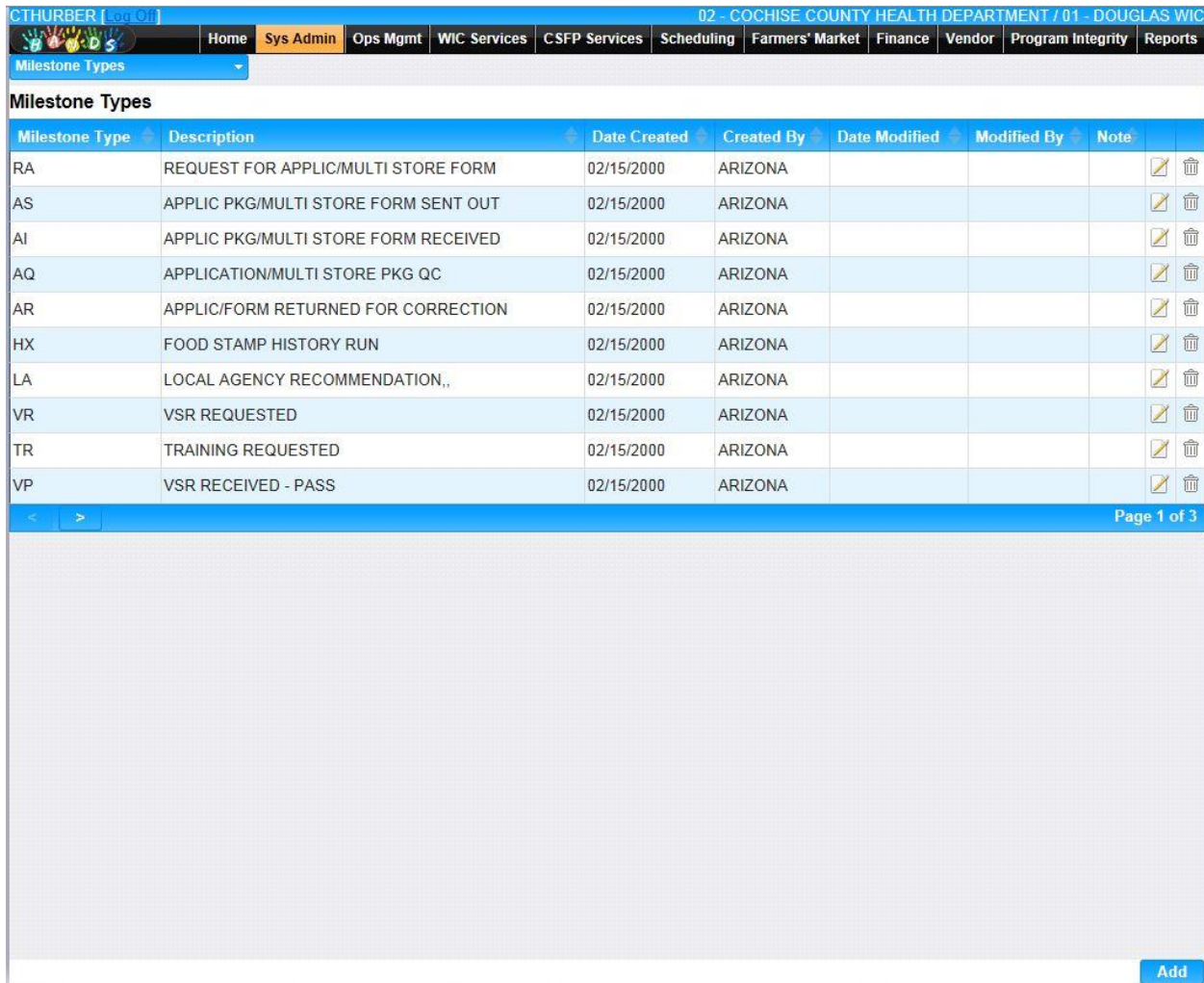
*Calculation(s): None*

*Background Processes: None*

### 12.12 Milestone Types

The Milestone Types Base Table is used under the Application Milestones Base Table page when a User adds an Application Milestone. Current records for Milestone Types will appear in the Milestone Types Grid. The user can add further Milestone Types to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Milestone Types page.

Navigation Path: Sys Admin / Vendor Base Tables / Milestones Types




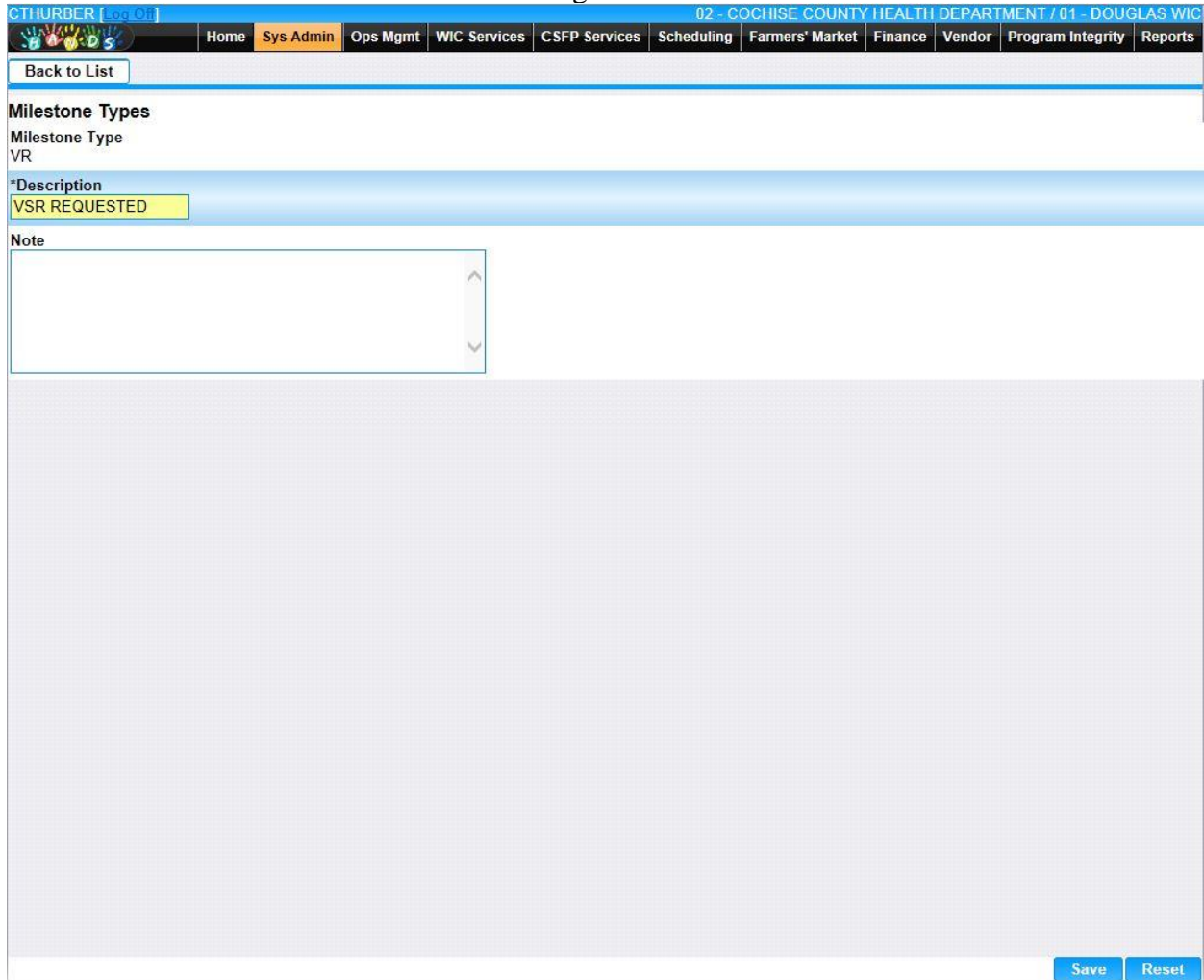
Milestone Type	Description	Date Created	Created By	Date Modified	Modified By	Note
RA	REQUEST FOR APPLIC/MULTI STORE FORM	02/15/2000	ARIZONA			
AS	APPLIC PKG/MULTI STORE FORM SENT OUT	02/15/2000	ARIZONA			
AI	APPLIC PKG/MULTI STORE FORM RECEIVED	02/15/2000	ARIZONA			
AQ	APPLICATION/MULTI STORE PKG QC	02/15/2000	ARIZONA			
AR	APPLIC/FORM RETURNED FOR CORRECTION	02/15/2000	ARIZONA			
HX	FOOD STAMP HISTORY RUN	02/15/2000	ARIZONA			
LA	LOCAL AGENCY RECOMMENDATION,,	02/15/2000	ARIZONA			
VR	VSR REQUESTED	02/15/2000	ARIZONA			
TR	TRAINING REQUESTED	02/15/2000	ARIZONA			
VP	VSR RECEIVED - PASS	02/15/2000	ARIZONA			

Figure : Milestone Types

Fields:

- **Milestone Type** – A unique code given to identify the type of Milestone.
- **Description** – This field describes the type of Milestone.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.

- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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**Milestone Types**

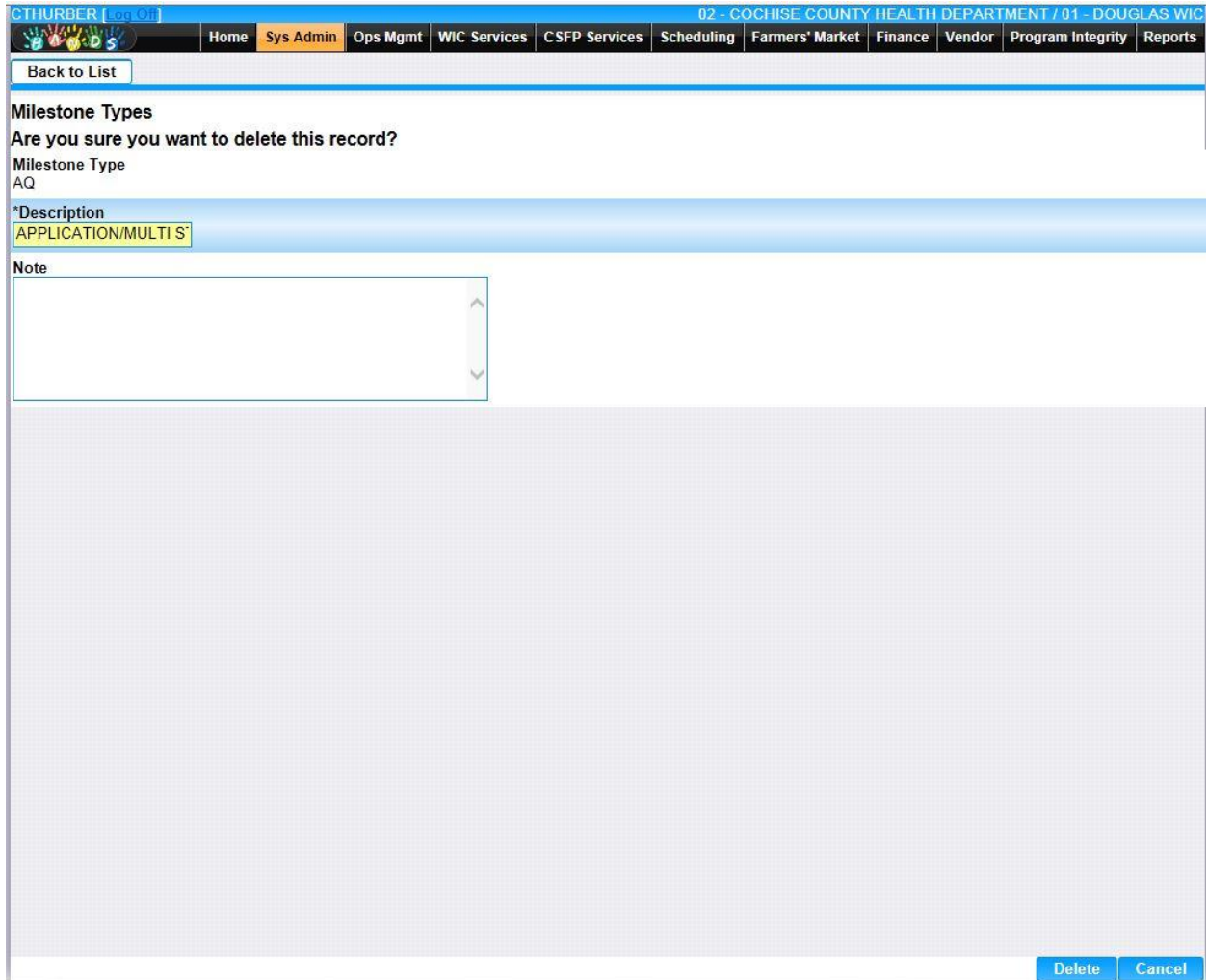
Milestone Type  
VR

\*Description  
VSR REQUESTED

Note

Save Reset

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



*Buttons:*



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

The screenshot shows a web application interface for adding milestone types. At the top, there is a navigation bar with the user name 'CTHURBER' and the system title '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. Below this is a menu with various system functions. The main content area is titled 'Milestone Types' and contains three input fields: '\*Milestone Type', '\*Description', and 'Note'. The 'Note' field is a larger text area with a vertical scrollbar. At the bottom right of the form, there are 'Save' and 'Reset' buttons.

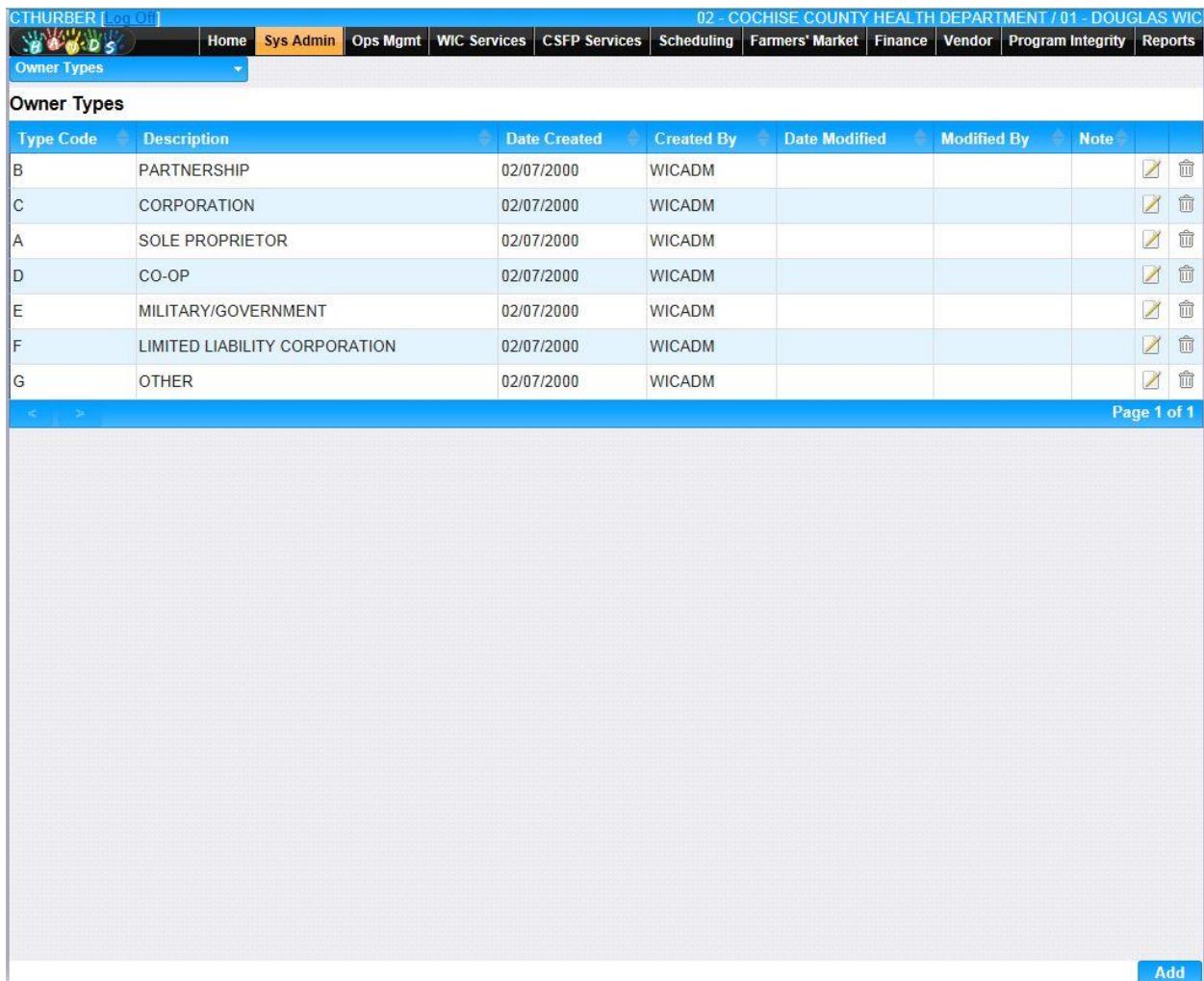
*Calculation(s): None*















*Background Processes: None*

## 12.13 Owner Types

The Owner Types Base Table is used under the Owner pages. It is available as a Drop Down list for Type of Ownership within the Owner Lookup Search. It is also used to populate the Type of Ownership for Owner add/edit. Current records for Owner Types will appear in the Owner Types Grid. The user can add further Owner Types to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Owner Types page.

Navigation Path: Sys Admin / Vendor Base Tables / Owners Types



Type Code	Description	Date Created	Created By	Date Modified	Modified By	Note		
B	PARTNERSHIP	02/07/2000	WICADM					
C	CORPORATION	02/07/2000	WICADM					
A	SOLE PROPRIETOR	02/07/2000	WICADM					
D	CO-OP	02/07/2000	WICADM					
E	MILITARY/GOVERNMENT	02/07/2000	WICADM					
F	LIMITED LIABILITY CORPORATION	02/07/2000	WICADM					
G	OTHER	02/07/2000	WICADM					


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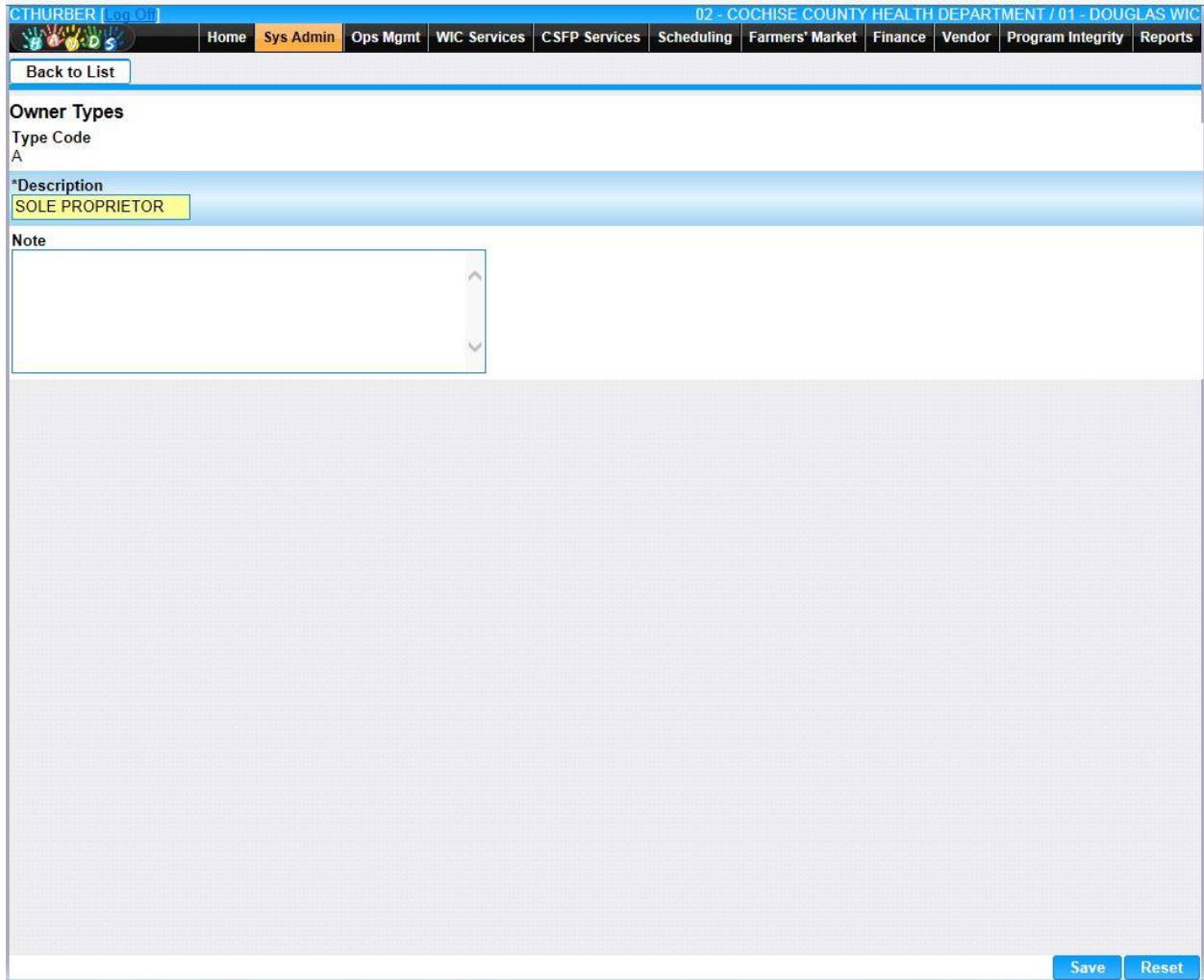
[Add](#)

*Figure: Owner Types*

### Fields:

- **Type Code** – A code used to uniquely identify the type of Owner.
- **Description** – The description of the Owner type.

- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  (**Edit Icon**) – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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**Owner Types**

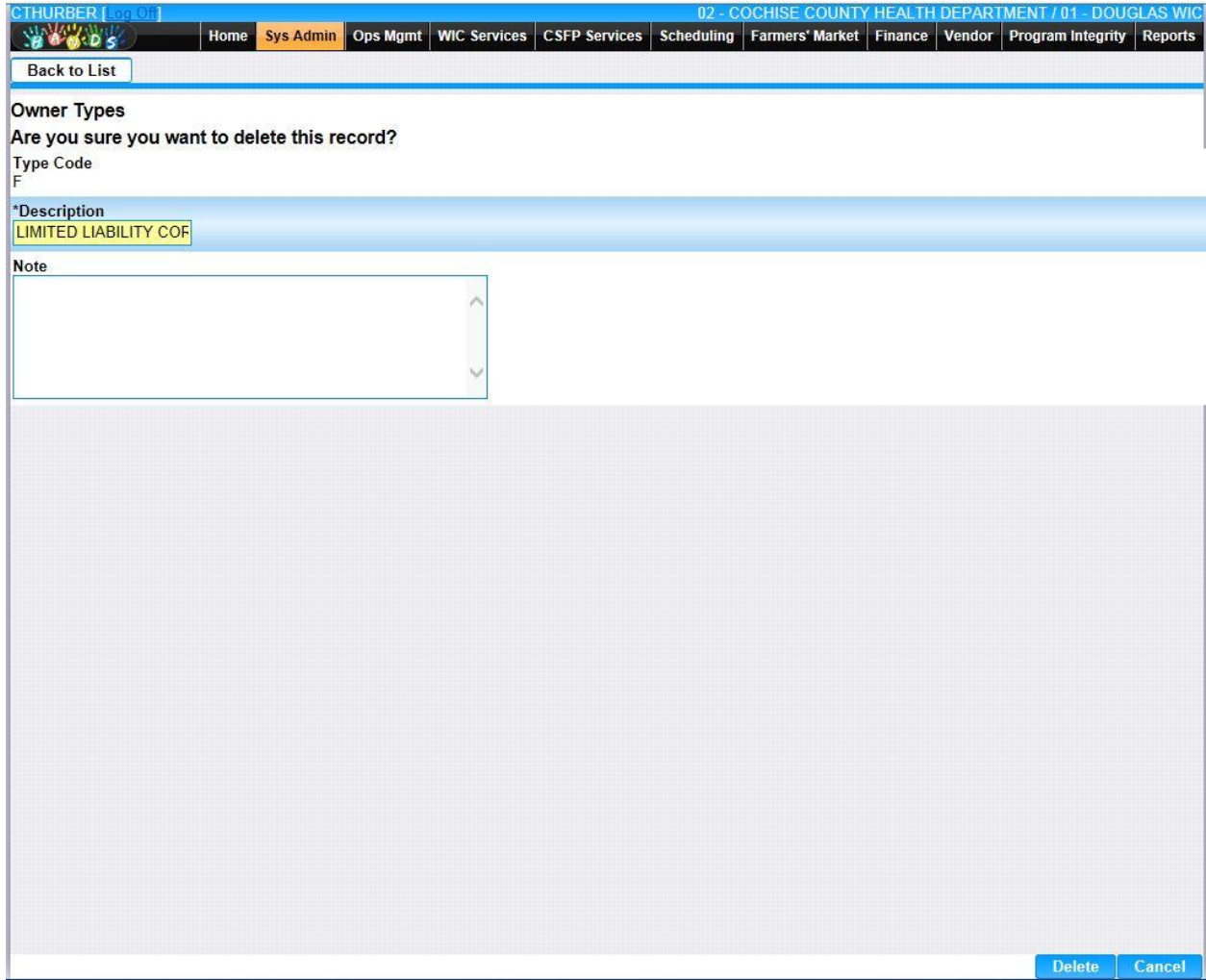
Type Code  
A

\*Description  
SOLE PROPRIETOR

Note

Save Reset

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



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**Owner Types**  
Are you sure you want to delete this record?

Type Code  
F

\*Description  
LIMITED LIABILITY COF

Note

Delete Cancel



*Buttons:*


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

The screenshot shows a web application interface for adding owner types. At the top, there is a navigation bar with the user name 'CTHURBER' and a list of menu items: Home, Sys Admin (highlighted), Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. Below the navigation bar is a 'Back to List' button. The main content area is titled 'Owner Types' and contains three input fields: '\*Type Code' (a yellow text box), '\*Description' (a yellow text box), and 'Note' (a larger text area with a vertical scrollbar). At the bottom right of the form, there are two buttons: 'Save' and 'Reset'.


*Calculation(s): None*

*Background Processes: None*

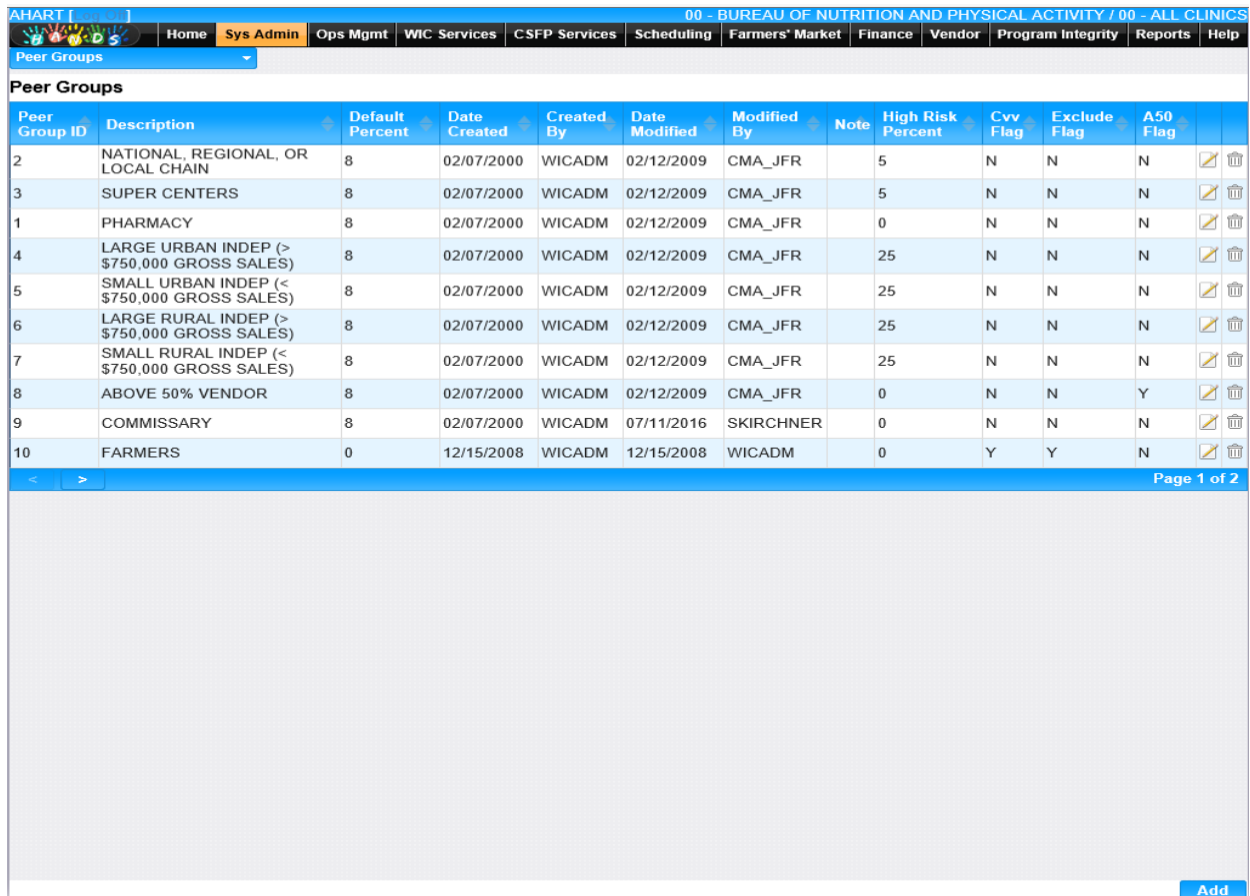
### 12.14 Peer Groups





















The Peer Groups Base Table is used under the Owner pages. It is available as a Drop-Down list for Peer Group within the Vendor Lookup Search. It is also used to populate the Peer Groups for Owner add/edit. The FI Peer Group Averages also utilizes this Base Table. Current records for Peer Groups Types will appear in the Peer Groups Grid. The user can add further Peer Groups to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Any Peer Group entry in the Base Table can have their display switched on and off for all Peer Group drop-downs throughout the Vendor Module, by use of the Exclude Flag. The Peer Group will also be excluded from any MARL calculation when the Exclude Flag is active.

The A50 flag can be used to indicate if that group should be included in the A50 peer group. A50 vendors must always be limited to the mean of all other vendors. Rather than using the normal MARL calculation, the A50 group MARL is calculated using the Non-A50 group’s requested amounts. Meaning, the MARL for A50 vendors is set as the mean of the vendor’s requested amounts on a 30-day period for each food instrument for all non-A50 vendors.


A record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Peer Groups page.

Navigation Path: Sys Admin | Vendor Base Tables | Peer Groups



Peer Group ID	Description	Default Percent	Date Created	Created By	Date Modified	Modified By	Note	High Risk Percent	Cvw Flag	Exclude Flag	A50 Flag		
2	NATIONAL, REGIONAL, OR LOCAL CHAIN	8	02/07/2000	WICADM	02/12/2009	CMA_JFR		5	N	N	N		
3	SUPER CENTERS	8	02/07/2000	WICADM	02/12/2009	CMA_JFR		5	N	N	N		
1	PHARMACY	8	02/07/2000	WICADM	02/12/2009	CMA_JFR		0	N	N	N		
4	LARGE URBAN INDEP (> \$750,000 GROSS SALES)	8	02/07/2000	WICADM	02/12/2009	CMA_JFR		25	N	N	N		
5	SMALL URBAN INDEP (< \$750,000 GROSS SALES)	8	02/07/2000	WICADM	02/12/2009	CMA_JFR		25	N	N	N		
6	LARGE RURAL INDEP (> \$750,000 GROSS SALES)	8	02/07/2000	WICADM	02/12/2009	CMA_JFR		25	N	N	N		
7	SMALL RURAL INDEP (< \$750,000 GROSS SALES)	8	02/07/2000	WICADM	02/12/2009	CMA_JFR		25	N	N	N		
8	ABOVE 50% VENDOR	8	02/07/2000	WICADM	02/12/2009	CMA_JFR		0	N	N	Y		
9	COMMISSARY	8	02/07/2000	WICADM	07/11/2016	SKIRCHNER		0	N	N	N		
10	FARMERS	0	12/15/2008	WICADM	12/15/2008	WICADM		0	Y	Y	N		

*Figure : Peer Groups**Fields:*

- **Peer Group ID** – A code used to uniquely identify the Peer Group. Both the Peer Group ID and the Description will be shown on the MARL Override & MARL Exception
- **Description** – The description of the Peer Group. Both the Peer Group ID and the Description will be shown on the MARL Override & MARL Exception
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
- **High Risk Percent** –
- **Cvv Flag** –
- **Exclude Flag** – A Yes or No field that shows whether the Peer group is included/excluded from the MARL Override and Exceptions screens.
- **A50 Flag** – Allows users to identify if the Peer Group is an A50 Peer Group or not. It enables users to identify A50 vendor independently from their Peer Group ID. This determines if the MARL calculation is done through the state average calculation, or not.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.

00 - BUREAU OF NUTRITION AND PHYSICAL ACTIVITY / 00 - ALL CLINICS

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**Peer Groups**

Peer Group ID  
7

**\*Description**  
SMALL RURAL INDEP (< \$750,000 GROSS SALES)

**\*Default Percent**  
8

**Note**


**\*High Risk Percent**  
25

**Cvv Flag**  
NO

**\*Exclude Flag**  
NO

**\*A50 Flag**  
NO

[Save](#) [Reset](#)

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

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**Peer Groups**

Are you sure you want to delete this record?

Peer Group ID  
6

\*Description  
LARGE RURAL INDEP (> \$750,000 GROSS SALES)

\*Default Percent  
8

Note

\*High Risk Percent  
25

Cvv Flag  
NO

\*Exclude Flag  
NO

\*A50 Flag  
NO

[Delete](#) [Cancel](#)

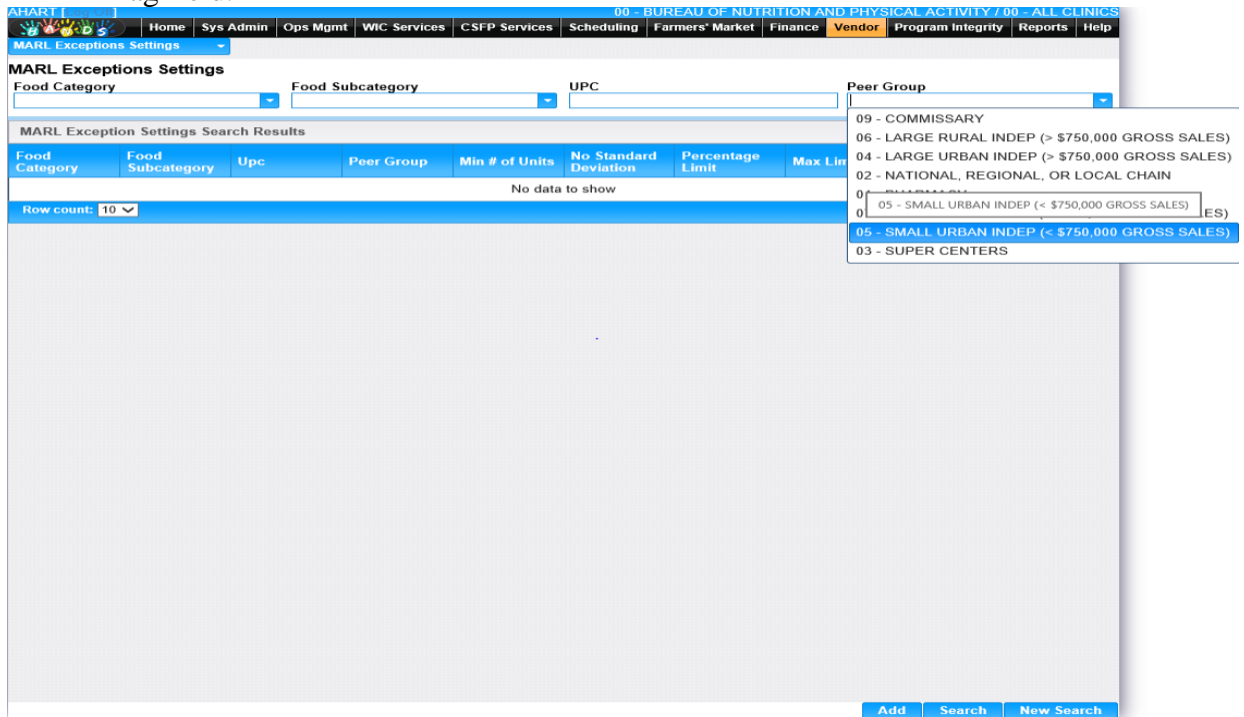
Buttons:

- **Add** – When selected focus is passed to the Add Peer Groups page.

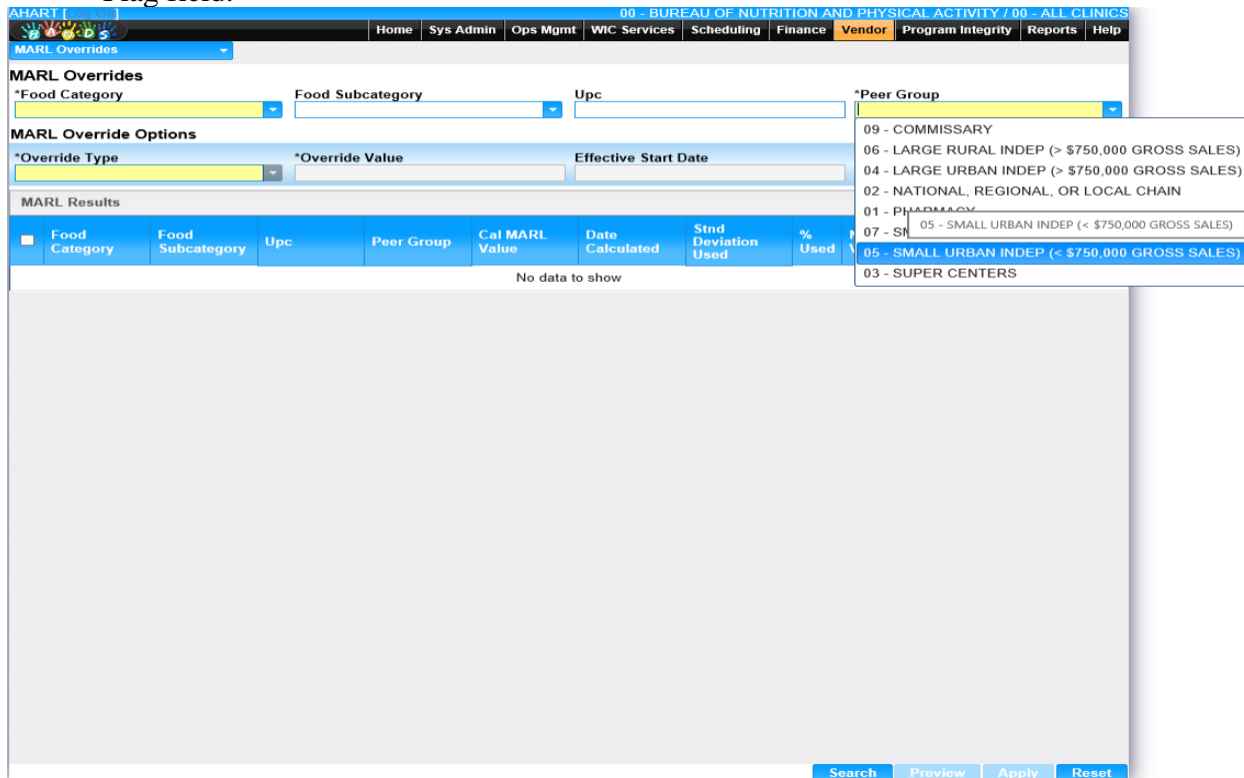
The screenshot shows a web application interface for adding peer groups. At the top, there is a navigation bar with the AHART logo and a menu including Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, Reports, and Help. Below the navigation bar is a 'Back to List' button. The main form area is titled 'Peer Groups' and contains several input fields: a text field for '\*Peer Group ID' with the value '0', a large text area for '\*Description', a text field for '\*Default Percent' with the value '0', a text area for 'Note', a text field for '\*High Risk Percent' with the value '0', and three dropdown menus for 'Cvv Flag', '\*Exclude Flag', and '\*A50 Flag', all currently set to 'NOT SET'. At the bottom right of the form, there are 'Save' and 'Reset' buttons.

*Synchronized Pages:*

- Peer Group: MARL Exceptions** – When selecting the Peer Group field only Peer Group IDs & Descriptions will be displayed for Peer Groups with an ‘N’ value on the Exclude Flag field.



- Peer Group: MARL Override** – When selecting the Peer Group field only Peer Group IDs & Descriptions will be displayed for Peer Groups with an ‘N’ value on the Exclude Flag field.





Calculation(s): None

Background Processes: Exclude Flag & A50 Flag

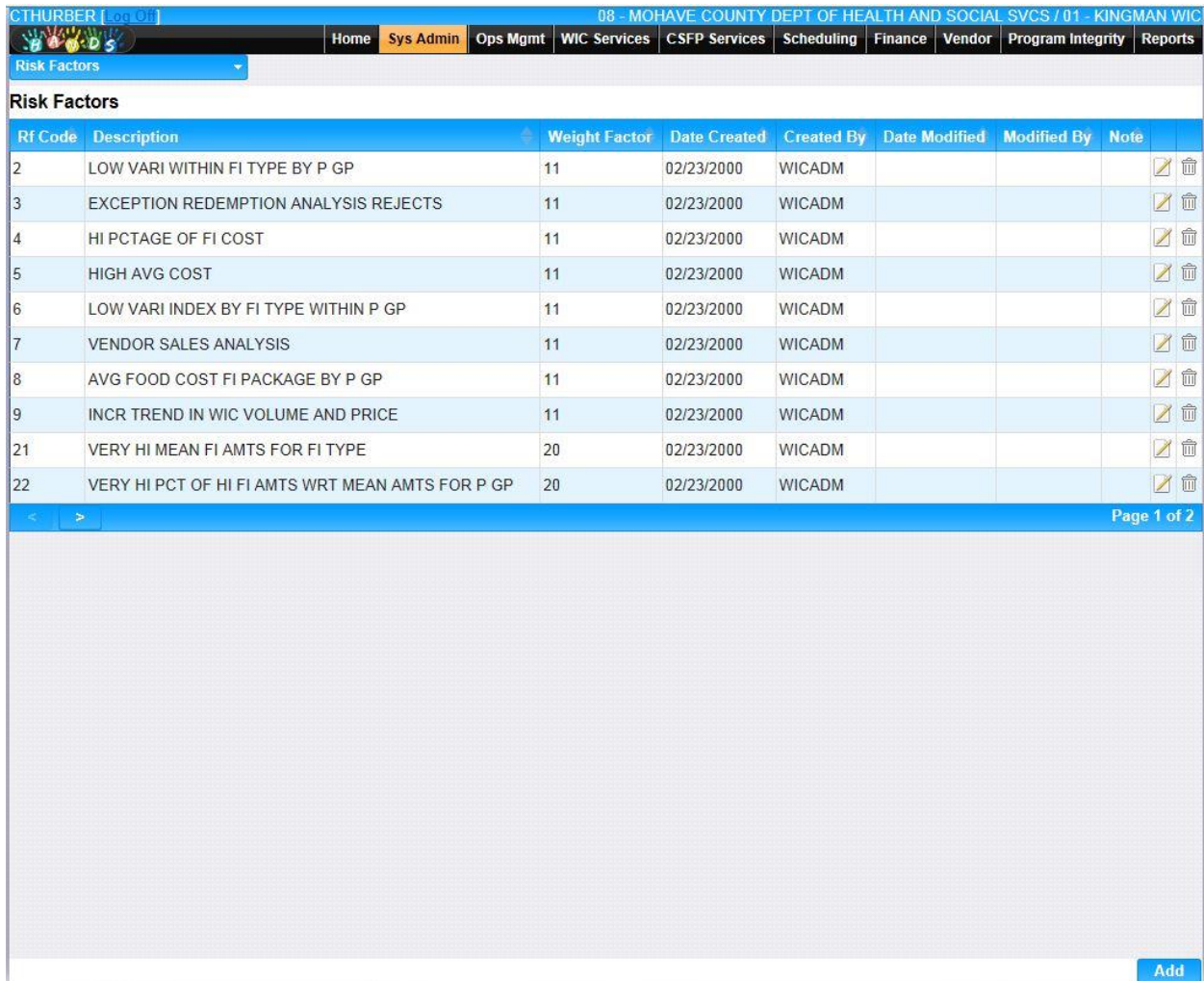
EXCLUDE	A50	Behaviors
True	True	<ul style="list-style-type: none"> <li>- Peer Group <b>will not</b> display in the Peer Group drop down as an option for searching or adding of a new record on the MARL Exception and Override screens.</li> <li>- Peer Group’s redemptions will not be included in statewide average calculations.</li> <li>- MARLs will not be calculated and prior entries removed from the MARL table.</li> <li>- No MARL values will be sent in the UPC file for this group.</li> </ul>
True	False	<ul style="list-style-type: none"> <li>- Peer Group <b>will not</b> display in the Peer Group drop down as an option for searching or adding of a new record on the MARL Exception and Override screens.</li> <li>- Peer Group’s redemptions will not be included in statewide average calculations.</li> <li>- MARLs will not be calculated and prior entries removed from the MARL table.</li> <li>- No MARL values will be sent in the UPC file for this group.</li> </ul>
False	True	<ul style="list-style-type: none"> <li>- Peer Group <b>will not</b> display in the Peer Group drop down as an option for searching or adding of a new record on the MARL Exception and Override screens.</li> <li>- Peer Group redemptions are excluded from the statewide average calculation.</li> <li>- UPC files will use the statewide average for this group’s MARL values.</li> </ul> <p>*Note: the A50 attribute will automatically exclude the peer group from the Exception/Override list and ignore the “False” setting of the Exclude attribute.</p>
False	False	<ul style="list-style-type: none"> <li>- Peer Group <b>will</b> display in the Peer Group drop down as an option for searching or adding of a new record on the MARL Exception and Override screens.</li> <li>- Peer Group’s redemptions will be included in statewide average calculations.</li> <li>- UPC files will include appropriately calculated MARL amount for each UPC for this group.</li> </ul>



### 12.15 Risk Factors

Current records for TIP-related Risk Factors will appear in the Risk Factors Grid. The user can add further Risk Factors to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Risk Factors page.

Navigation Path: Sys Admin | Vendor Base Tables | Risk Factors




Rf Code	Description	Weight Factor	Date Created	Created By	Date Modified	Modified By	Note
2	LOW VARI WITHIN FI TYPE BY P GP	11	02/23/2000	WICADM			
3	EXCEPTION REDEMPTION ANALYSIS REJECTS	11	02/23/2000	WICADM			
4	HI PCTAGE OF FI COST	11	02/23/2000	WICADM			
5	HIGH AVG COST	11	02/23/2000	WICADM			
6	LOW VARI INDEX BY FI TYPE WITHIN P GP	11	02/23/2000	WICADM			
7	VENDOR SALES ANALYSIS	11	02/23/2000	WICADM			
8	AVG FOOD COST FI PACKAGE BY P GP	11	02/23/2000	WICADM			
9	INCR TREND IN WIC VOLUME AND PRICE	11	02/23/2000	WICADM			
21	VERY HI MEAN FI AMTS FOR FI TYPE	20	02/23/2000	WICADM			
22	VERY HI PCT OF HI FI AMTS WRT MEAN AMTS FOR P GP	20	02/23/2000	WICADM			

Figure: Risk Factors

Fields:

- **Rf Code** – A system generated value to provide a unique identifier for the Risk Factor.
- **Description** – The description of the Vendor Risk Factor.
- **Weight Factors** – The weighting factor assigned to the retail Vendor Risk.
- **Date Created** – The date the record was first added to the system.

- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.

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**Risk Factors**


Rf Code  
5

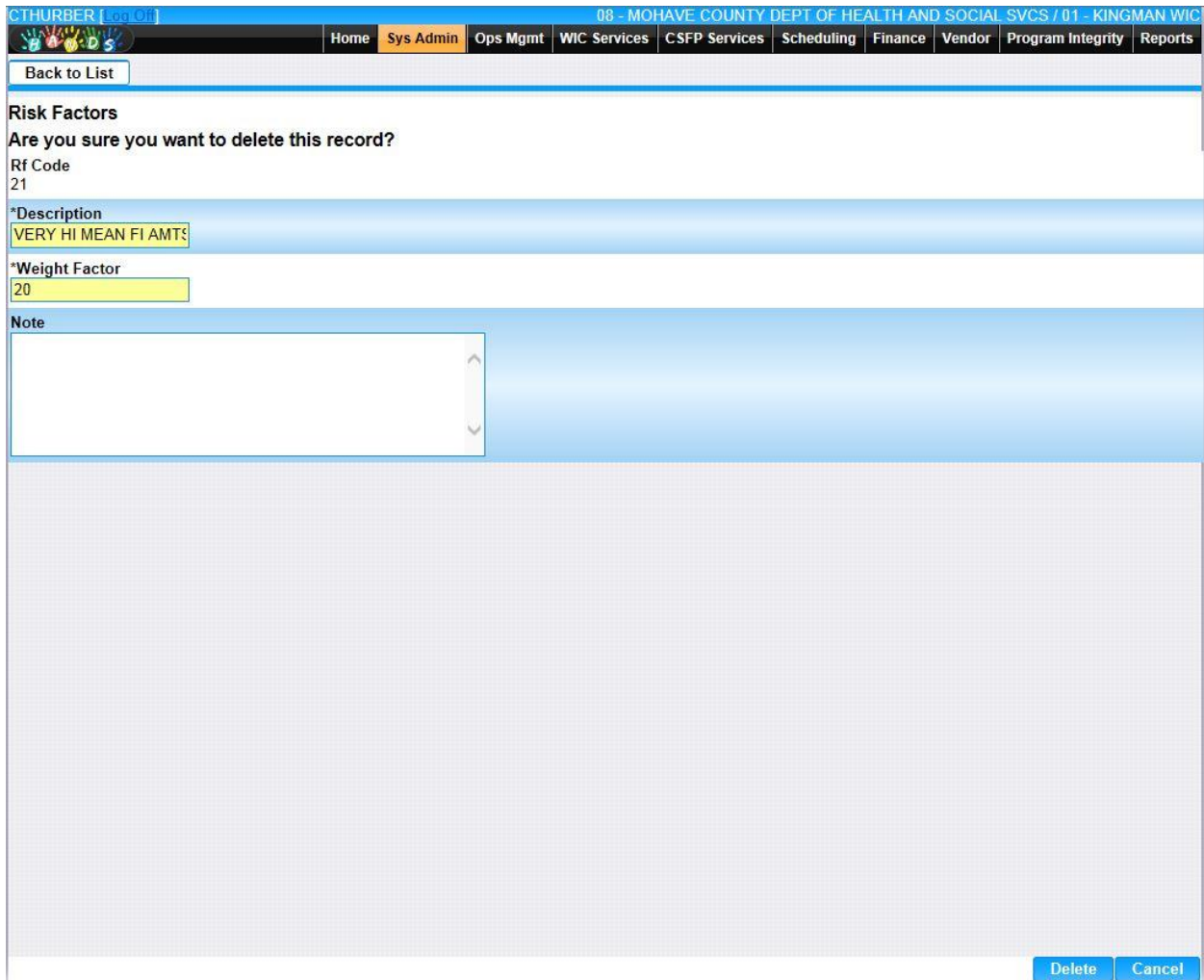
\*Description  
HIGH AVG COST

\*Weight Factor  
11

Note

Save Reset

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



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**Risk Factors**

Are you sure you want to delete this record?

Rf Code  
21

\*Description  
VERY HI MEAN FI AMT\$

\*Weight Factor  
20

Note

Delete Cancel

*Buttons:*

- **Add** – When selected focus is passed to the Add Risk Factors page.

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**Risk Factors**

\*Rf Code  
0

\*Description

\*Weight Factor  
0



Note

Save Reset

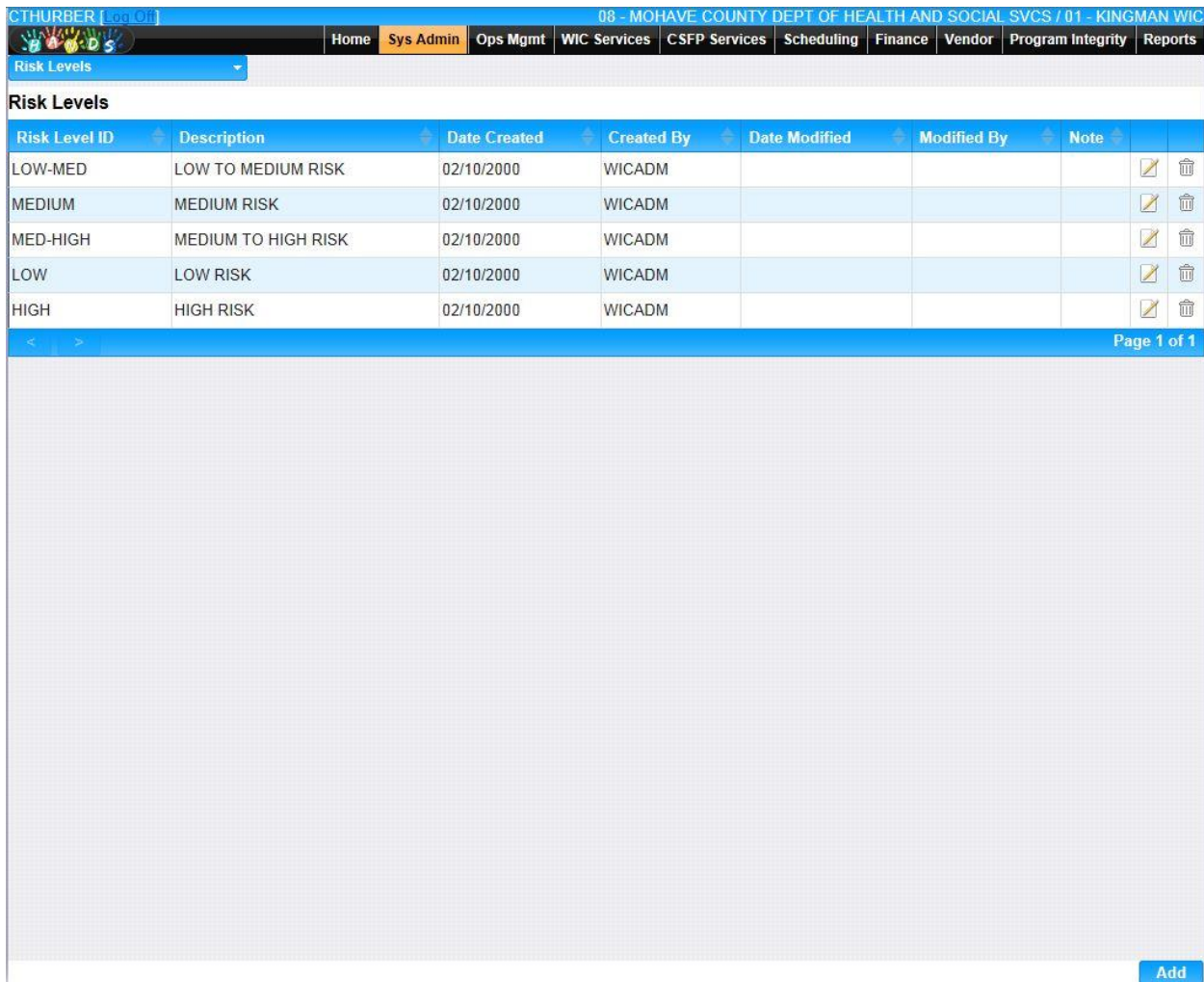
*Calculation(s): None*

*Background Processes: None*

### 12.16 Risk Levels

The Risk Levels Base Table is used under the Vendor. It is available as a Drop Down list for Risk Level within the Demographics | General page. Current records for Risk Levels will appear in the Risk Levels Grid. The user can add further Risk Levels to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Risk Levels page.

Navigation Path: Sys Admin / Vendor Base Tables / Risk Levels














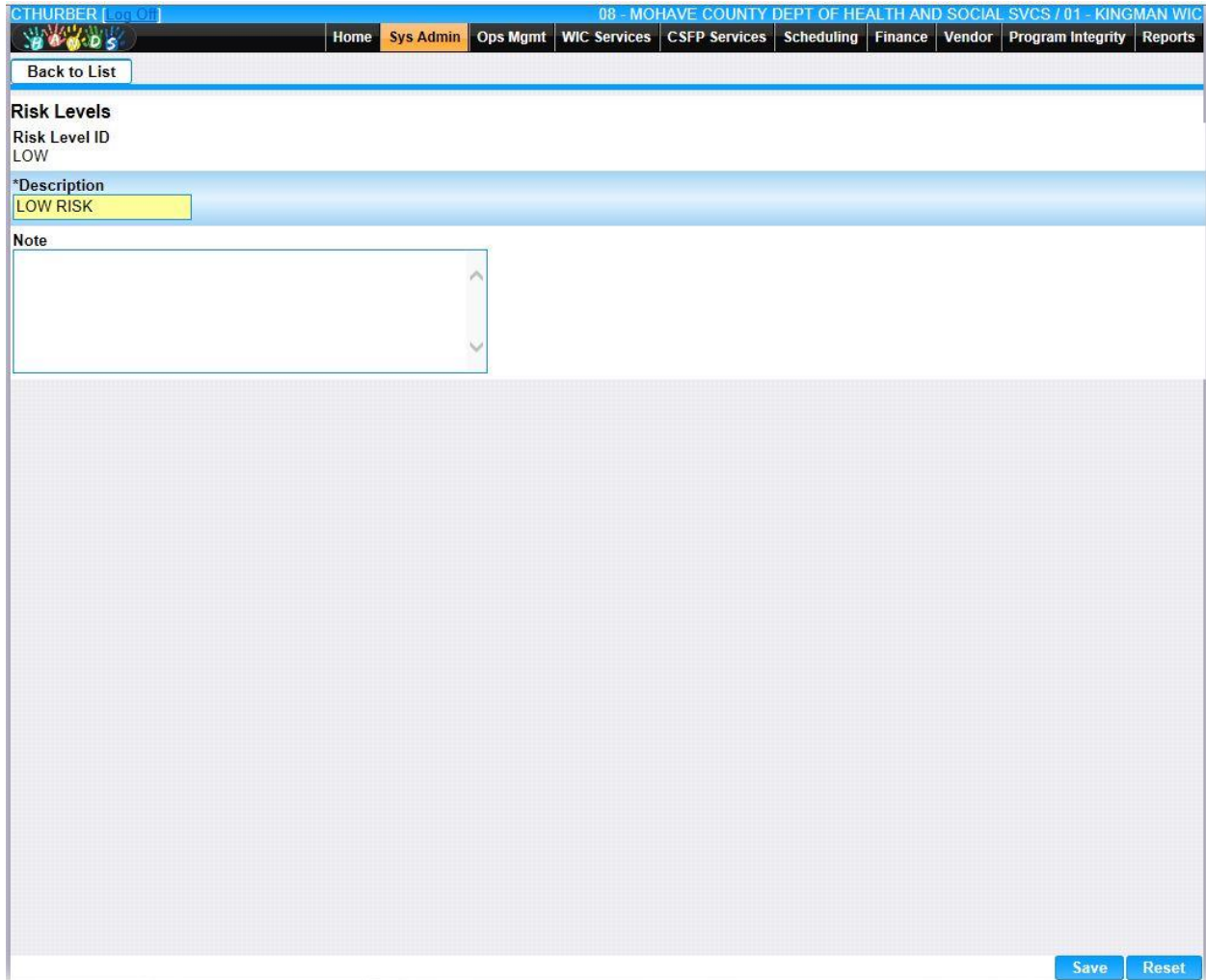
Risk Level ID	Description	Date Created	Created By	Date Modified	Modified By	Note		
LOW-MED	LOW TO MEDIUM RISK	02/10/2000	WICADM					
MEDIUM	MEDIUM RISK	02/10/2000	WICADM					
MED-HIGH	MEDIUM TO HIGH RISK	02/10/2000	WICADM					
LOW	LOW RISK	02/10/2000	WICADM					
HIGH	HIGH RISK	02/10/2000	WICADM					

Figure: Risk Levels

Fields:

- **Risk Level ID** – A code used to uniquely identify the Risk Level.
- **Description** – The description of the Risk Level.
- **Date Created** – The date the record was first added to the system.

- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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**Risk Levels**

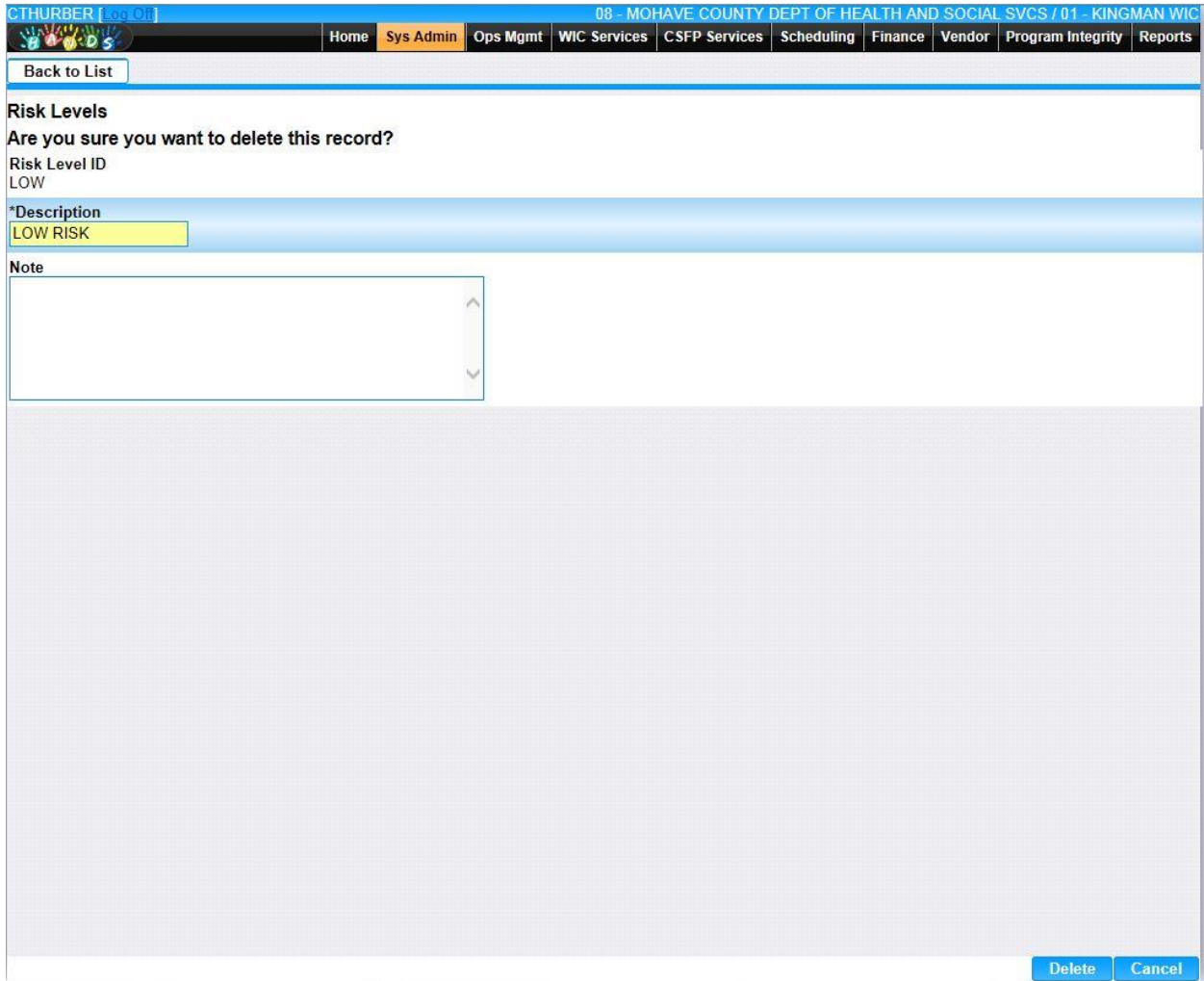
Risk Level ID  
LOW

\*Description  
LOW RISK

Note

Save Reset

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



*Buttons:*

- **Add** – When selected focus is passed to the Add Risk Level page.



The screenshot shows a web application interface for adding a risk level. At the top, there is a navigation bar with the user 'CTHURBER' and the system name '08 - MOHAVE COUNTY DEPT OF HEALTH AND SOCIAL SVCS / 01 - KINGMAN WIC'. The navigation menu includes 'Home', 'Sys Admin' (highlighted), 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. Below the navigation bar is a 'Back to List' button. The main form area is titled 'Risk Levels' and contains three sections: '\*Risk Level ID' with a yellow input field, '\*Description' with a light blue input field, and 'Note' with a large white text area. At the bottom right of the form, there are 'Save' and 'Reset' buttons.

*Calculation(s): None*

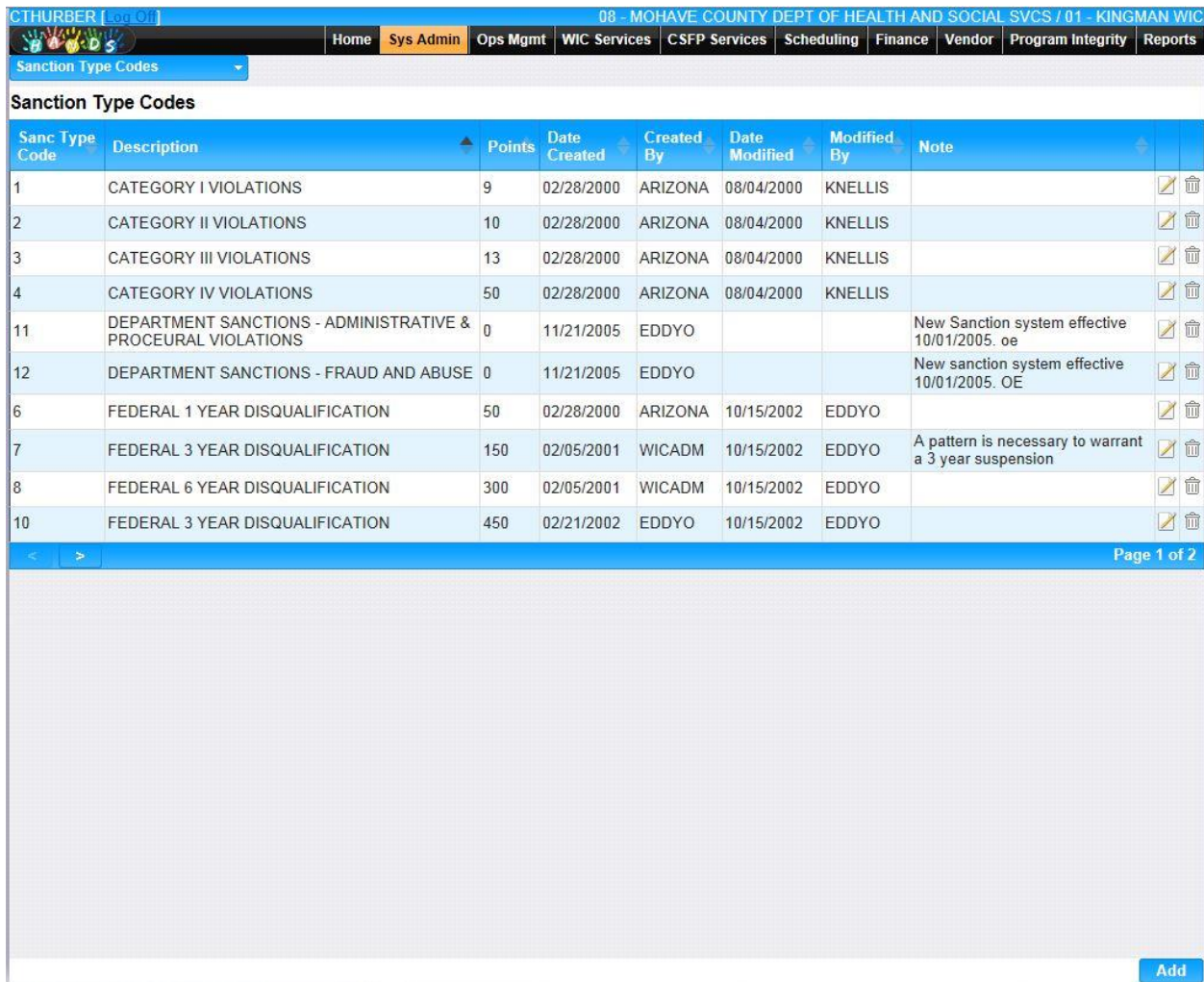
*Background Processes: None*



### 12.17 Sanction Type Codes

Current records for Sanction Type Codes will appear in the Sanction Type Codes Grid. The user can add further Sanction Type Codes to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Sanction Type Codes page.

Navigation Path: Sys Admin | Vendor Base Tables | Sanction Type Codes




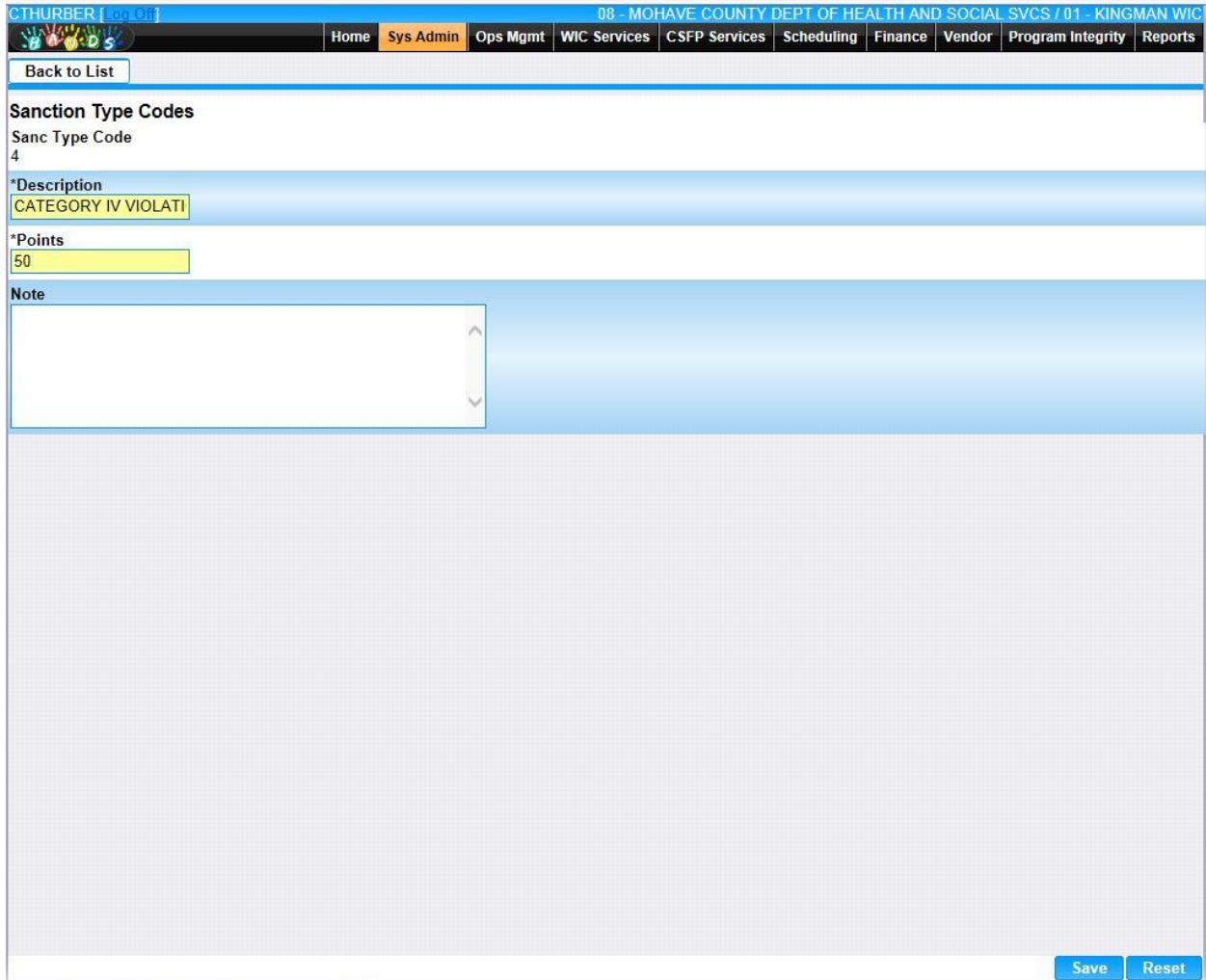
Sanc Type Code	Description	Points	Date Created	Created By	Date Modified	Modified By	Note
1	CATEGORY I VIOLATIONS	9	02/28/2000	ARIZONA	08/04/2000	KNELLIS	
2	CATEGORY II VIOLATIONS	10	02/28/2000	ARIZONA	08/04/2000	KNELLIS	
3	CATEGORY III VIOLATIONS	13	02/28/2000	ARIZONA	08/04/2000	KNELLIS	
4	CATEGORY IV VIOLATIONS	50	02/28/2000	ARIZONA	08/04/2000	KNELLIS	
11	DEPARTMENT SANCTIONS - ADMINISTRATIVE & PROCEURAL VIOLATIONS	0	11/21/2005	EDDYO			New Sanction system effective 10/01/2005. oe
12	DEPARTMENT SANCTIONS - FRAUD AND ABUSE	0	11/21/2005	EDDYO			New sanction system effective 10/01/2005. OE
6	FEDERAL 1 YEAR DISQUALIFICATION	50	02/28/2000	ARIZONA	10/15/2002	EDDYO	
7	FEDERAL 3 YEAR DISQUALIFICATION	150	02/05/2001	WICADM	10/15/2002	EDDYO	A pattern is necessary to warrant a 3 year suspension
8	FEDERAL 6 YEAR DISQUALIFICATION	300	02/05/2001	WICADM	10/15/2002	EDDYO	
10	FEDERAL 3 YEAR DISQUALIFICATION	450	02/21/2002	EDDYO	10/15/2002	EDDYO	

Figure : Sanction Type Codes

Fields:

- **Sanc Type Code** – A unique identifier for the Sanction Type Code.
- **Description** – The description of the Sanction Type Code.
- **Points** – The number of Sanction points assigned due to this Sanction Type.
- **Date Created** – The date the record was first added to the system.

- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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**Sanction Type Codes**


Sanc Type Code  
4

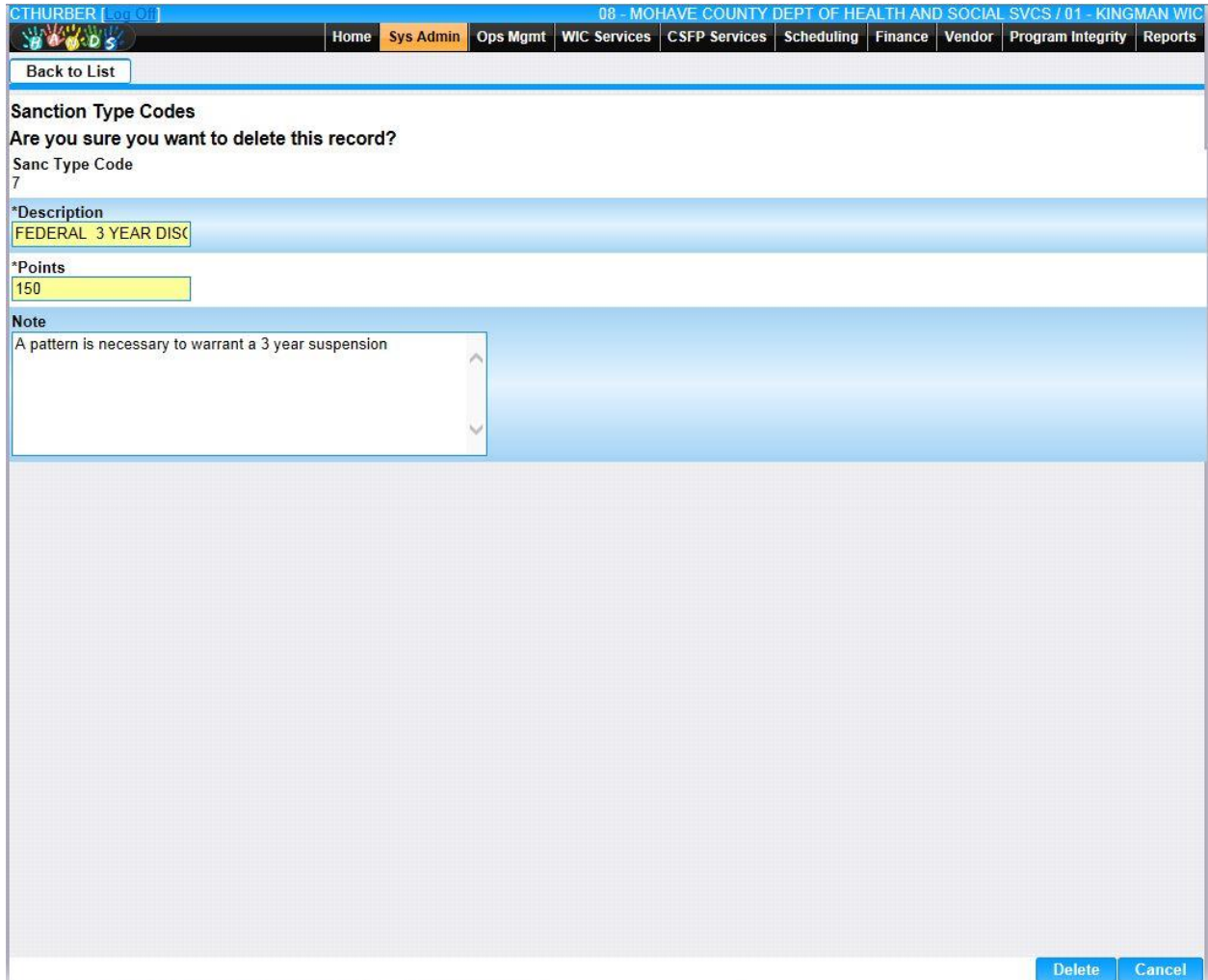
\*Description  
CATEGORY IV VIOLATI

\*Points  
50

Note

Save Reset

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



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**Sanction Type Codes**

Are you sure you want to delete this record?

Sanc Type Code  
7

\*Description  
FEDERAL 3 YEAR DISC

\*Points  
150

Note  
A pattern is necessary to warrant a 3 year suspension

Delete Cancel

*Buttons:*



- **Add** – When selected focus is passed to the Add Sanction Type Codes page.

The screenshot displays the 'Sanction Type Codes' form. At the top, there is a navigation bar with the user 'CTHURBER [Log Off]' and the system title '08 - MOHAVE COUNTY DEPT OF HEALTH AND SOCIAL SVCS / 01 - KINGMAN WIC'. Below this is a menu with options: Home, Sys Admin, Ops Mgmt, WIC Services, C.SFP Services, Scheduling, Finance, Vendor, Program Integrity, and Reports. A 'Back to List' button is located above the form title. The form itself has three required fields: '\*Sanc Type Code' (input: 0), '\*Description' (input: empty), and '\*Points' (input: 0). A 'Note' field is present below these, consisting of a text area with scroll arrows. At the bottom right of the form are 'Save' and 'Reset' buttons.

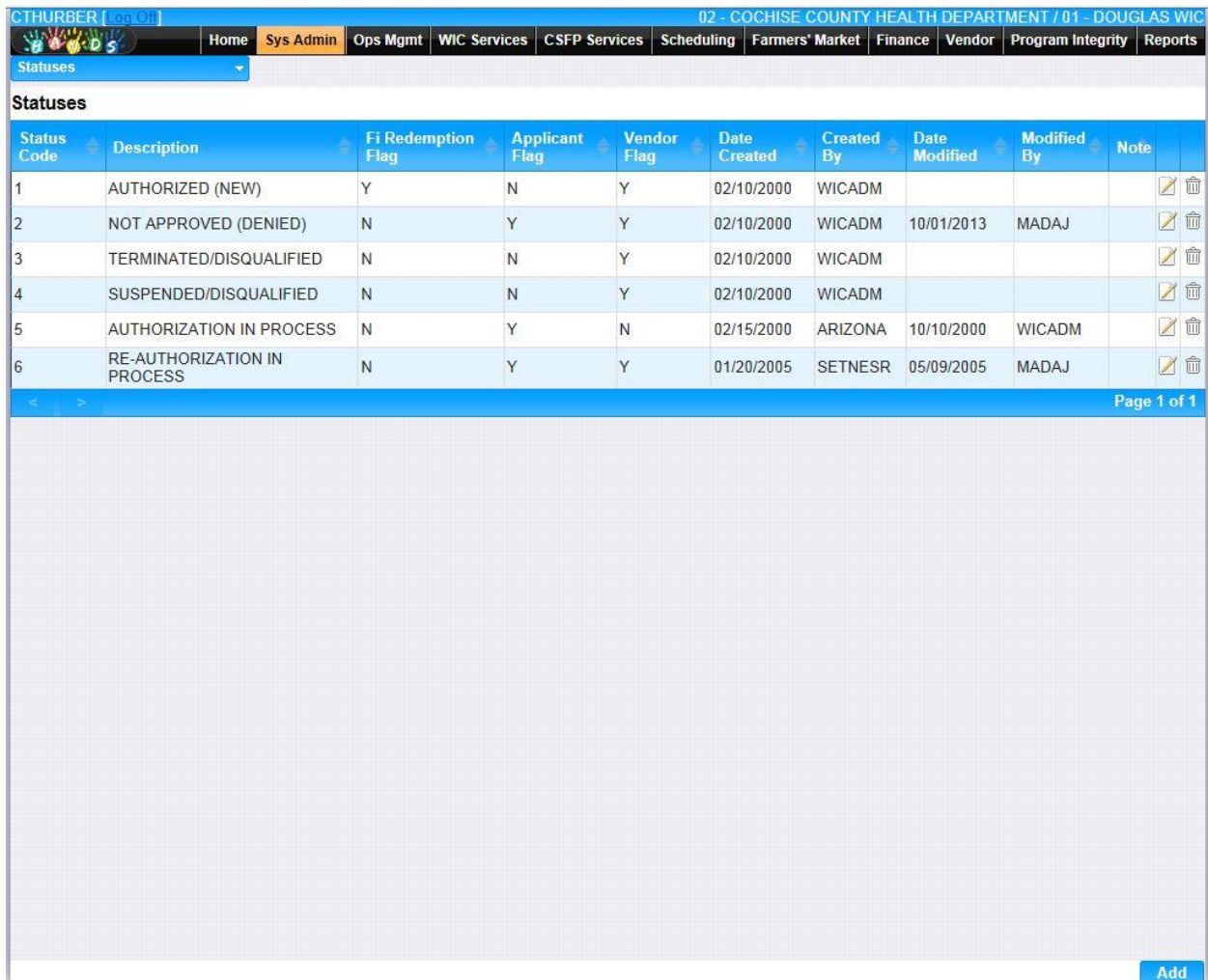
*Calculation(s): None*

*Background Processes: None*

### 12.18 Statuses

The Statuses Base Table is used under the Vendor pages. It is available as a Drop Down list for Status within the Vendor Lookup Search. It is also used to populate the Status for Vendor Demographics Authorizations add/edit. Current records for Statuses will appear in the Statuses Grid. The user can add further Statuses to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Statuses page.

Navigation Path: Sys Admin / Vendor Base Tables / Statuses




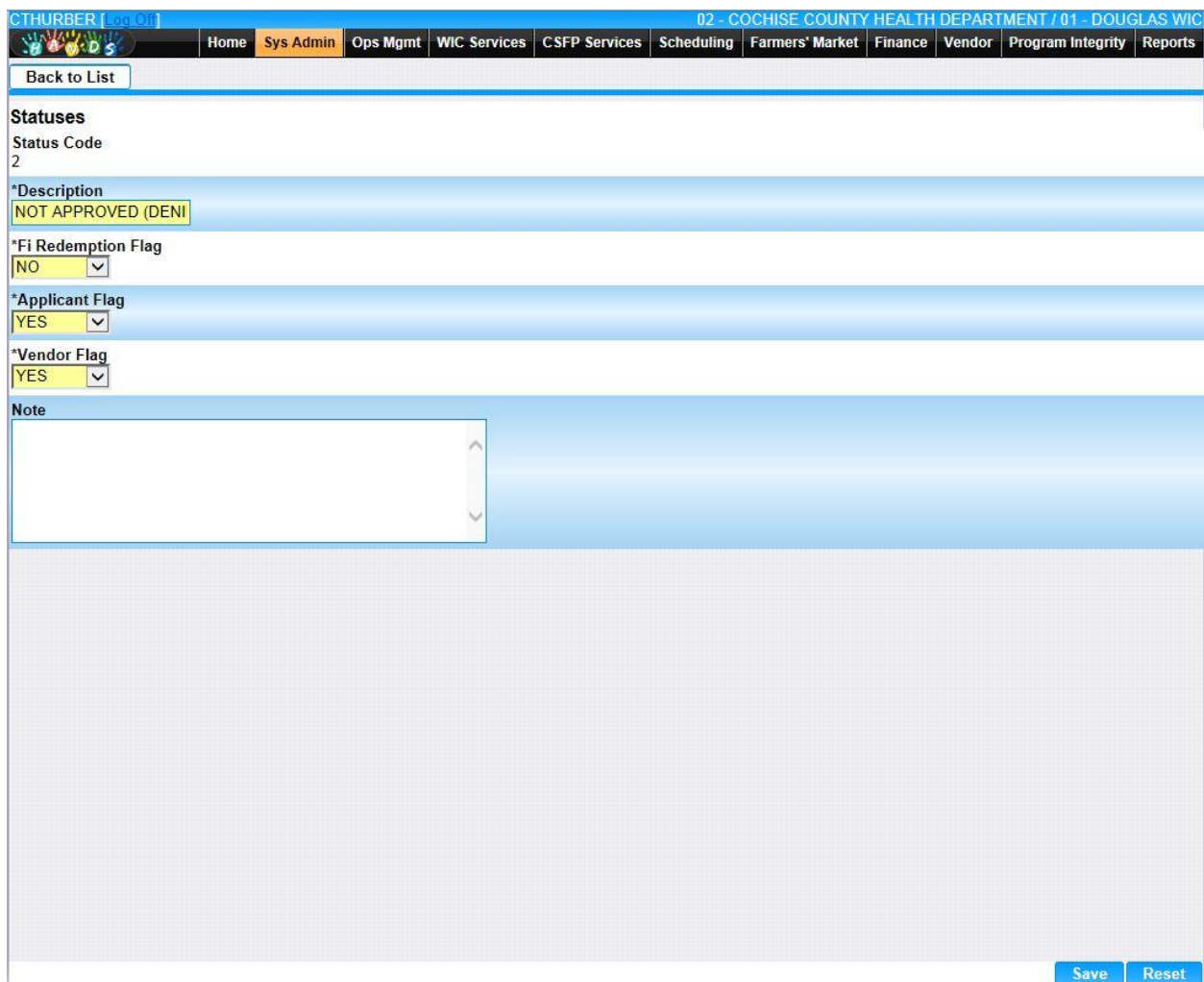
Status Code	Description	Fi Redemption Flag	Applicant Flag	Vendor Flag	Date Created	Created By	Date Modified	Modified By	Note
1	AUTHORIZED (NEW)	Y	N	Y	02/10/2000	WICADM			
2	NOT APPROVED (DENIED)	N	Y	Y	02/10/2000	WICADM	10/01/2013	MADAJ	
3	TERMINATED/DISQUALIFIED	N	N	Y	02/10/2000	WICADM			
4	SUSPENDED/DISQUALIFIED	N	N	Y	02/10/2000	WICADM			
5	AUTHORIZATION IN PROCESS	N	Y	N	02/15/2000	ARIZONA	10/10/2000	WICADM	
6	RE-AUTHORIZATION IN PROCESS	N	Y	Y	01/20/2005	SETNESR	05/09/2005	MADAJ	

Figure: Statuses

Fields:

- **Status Code** – A code used to uniquely identify the Status.
- **Description** – The description of the Status.


- **Fi Redemption Flag** – This flag indicates whether the Vendor Status allows Food Instrument Redemption.
- **Applicant Flag** – This flag indicates whether the Vendor Status indicates a Non-Approved application.
- **Vendor Flag** – This flag indicates whether the Vendor Status indicates an approved Vendor.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.

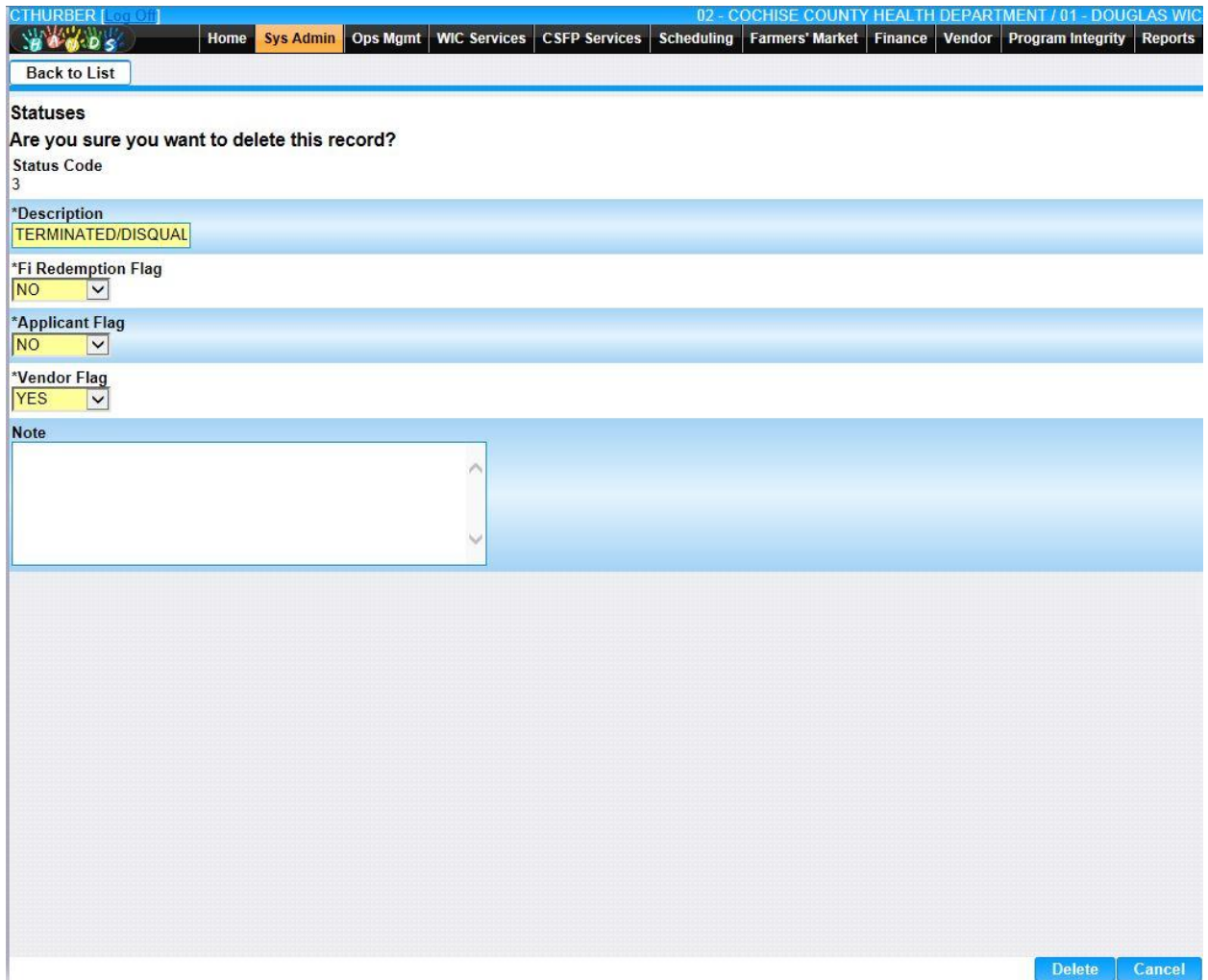


The screenshot shows a web application interface for editing a Vendor Status record. The top navigation bar includes the user name 'CTHURBER' and a 'Log Off' link, along with the page title '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. The main navigation menu contains links for Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. A 'Back to List' button is located at the top left of the content area. The form displays the following fields:

- Statuses**: Status Code: 2
- \*Description**: NOT APPROVED (DENI)
- \*Fi Redemption Flag**: NO
- \*Applicant Flag**: YES
- \*Vendor Flag**: YES
- Note**: A large text area for entering notes.

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

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



CTHURBER [icon] 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

Back to List

**Statuses**

Are you sure you want to delete this record?

Status Code  
3

\*Description  
TERMINATED/DISQUAL

\*Fi Redemption Flag  
NO

\*Applicant Flag  
NO

\*Vendor Flag  
YES

Note

Delete Cancel

*Buttons:*

- **Add** – When selected focus is passed to the Add Statuses page.

The screenshot shows the 'Add Statuses' page in the HANDS WIC System. At the top, there is a navigation menu with the following items: Home, Sys Admin (highlighted), Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. Below the navigation menu is a 'Back to List' button. The main form area is titled 'Statuses' and contains the following fields:

- \*Status Code: A text input field containing the value '0'.
- \*Description: A text input field.
- \*FI Redemption Flag: A dropdown menu with 'NOT SET' selected.
- \*Applicant Flag: A dropdown menu with 'NOT SET' selected.
- \*Vendor Flag: A dropdown menu with 'NOT SET' selected.
- Note: A large text area for entering a note.



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

*Calculation(s): None*

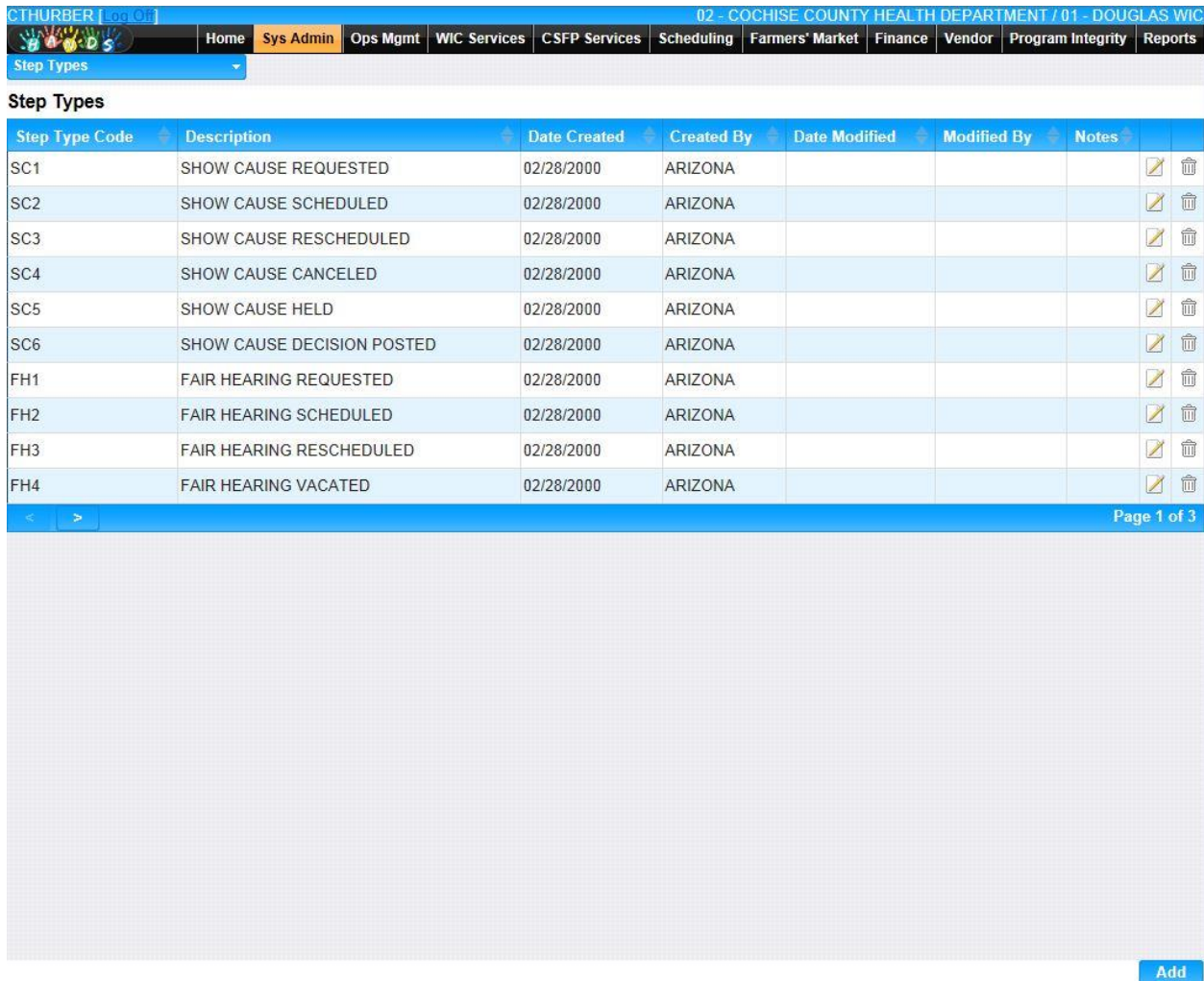
*Background Processes: None*























### 12.19 Step Types

Current appeal-related records for Step Types will appear in the Step Types Grid. The user can add further Step Types to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Step Types page.

Navigation Path: Sys Admin / Vendor Base Tables / Step Type



Step Type Code	Description	Date Created	Created By	Date Modified	Modified By	Notes		
SC1	SHOW CAUSE REQUESTED	02/28/2000	ARIZONA					
SC2	SHOW CAUSE SCHEDULED	02/28/2000	ARIZONA					
SC3	SHOW CAUSE RESCHEDULED	02/28/2000	ARIZONA					
SC4	SHOW CAUSE CANCELED	02/28/2000	ARIZONA					
SC5	SHOW CAUSE HELD	02/28/2000	ARIZONA					
SC6	SHOW CAUSE DECISION POSTED	02/28/2000	ARIZONA					
FH1	FAIR HEARING REQUESTED	02/28/2000	ARIZONA					
FH2	FAIR HEARING SCHEDULED	02/28/2000	ARIZONA					
FH3	FAIR HEARING RESCHEDULED	02/28/2000	ARIZONA					
FH4	FAIR HEARING VACATED	02/28/2000	ARIZONA					


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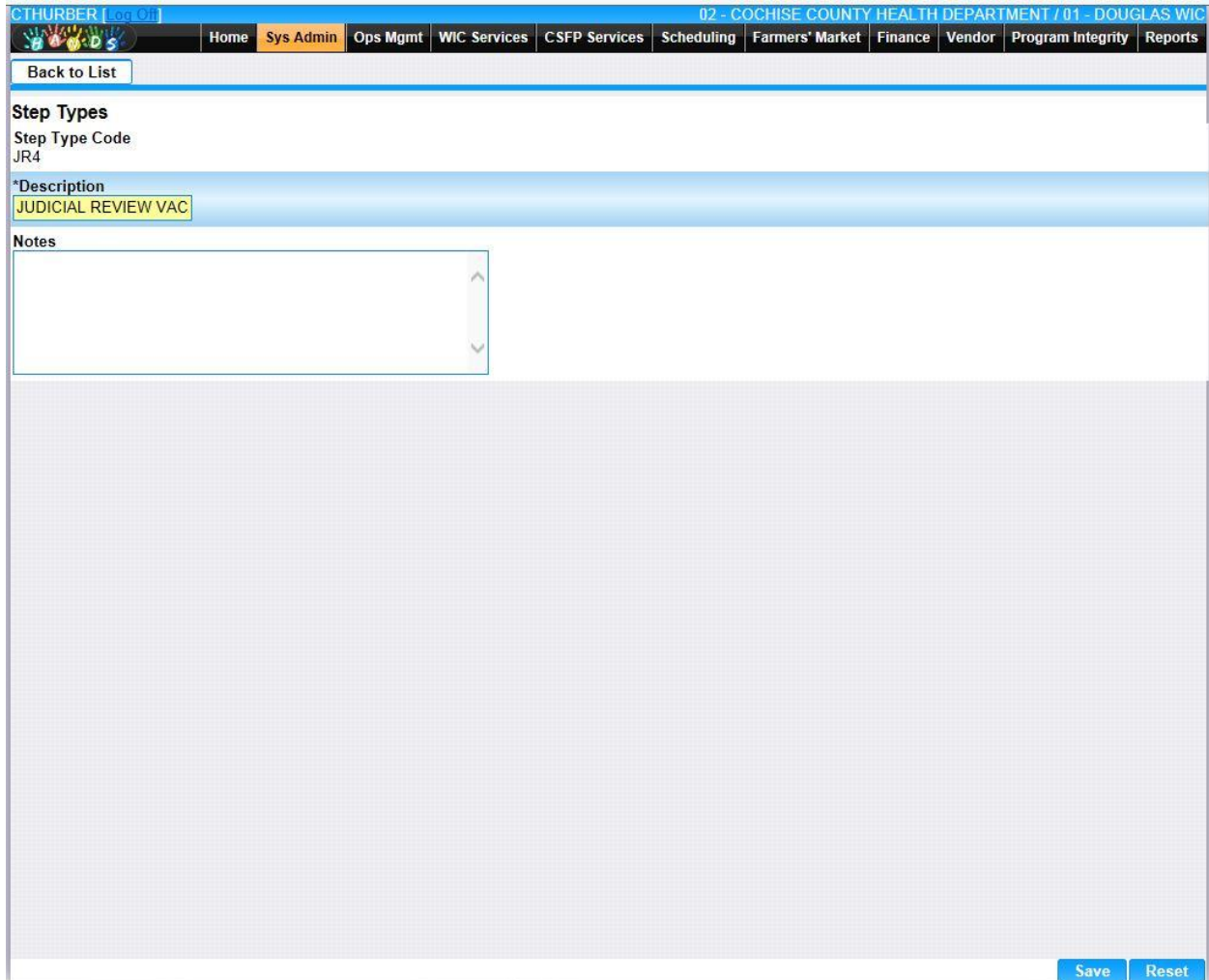
**Add**

Figure: Step Types

Fields:

- **Step Type Code** – The step type for an Appeal step.
- **Description** – The description of the Step Type Code.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.

- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



CTHURBER [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


Back to List

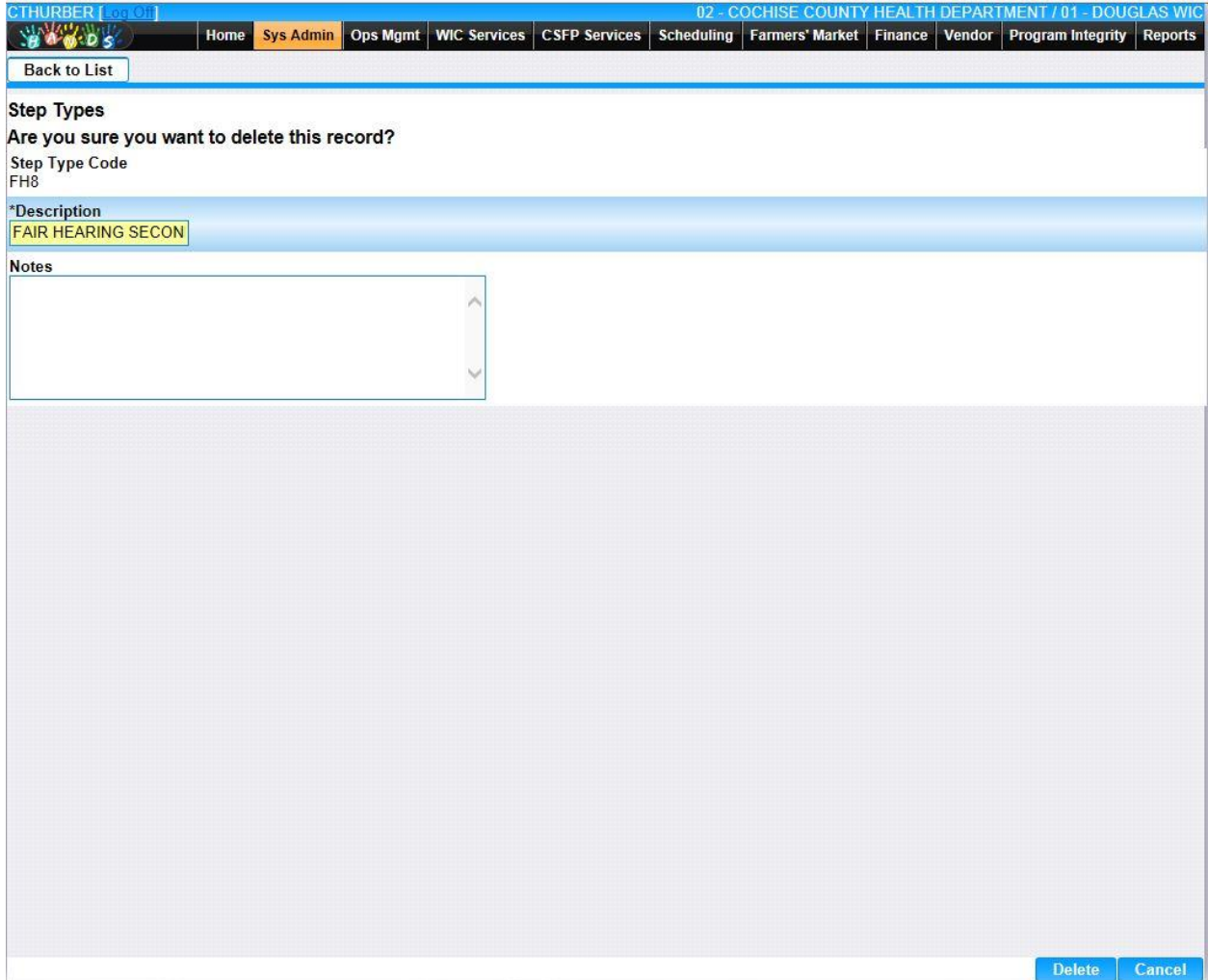
**Step Types**  
Step Type Code  
JR4

\*Description  
JUDICIAL REVIEW VAC

Notes

Save Reset

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



The screenshot shows a web application interface for deleting a record. At the top, there is a navigation menu with the following items: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. The current user is identified as CTHURBER [Log Out]. The page title is 02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC. Below the navigation menu, there is a "Back to List" button. The main content area is titled "Step Types" and contains the following information:

**Are you sure you want to delete this record?**  
Step Type Code  
FH8

\*Description  
FAIR HEARING SECON

Notes

At the bottom right of the form, there are two buttons: "Delete" and "Cancel".

*Buttons:*



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

The screenshot shows a web application interface for adding step types. At the top, there is a navigation bar with the user name 'CTHURBER [Log Out]' and the page title '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. Below this is a menu with options: Home, Sys Admin (highlighted), Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. A 'Back to List' button is located below the menu. The main content area is titled 'Step Types' and contains three input sections: '\*Step Type Code' with a yellow text box, '\*Description' with a yellow text box, and 'Notes' with a larger white text area and a vertical scrollbar. At the bottom right of the form, there are two buttons: 'Save' and 'Reset'.

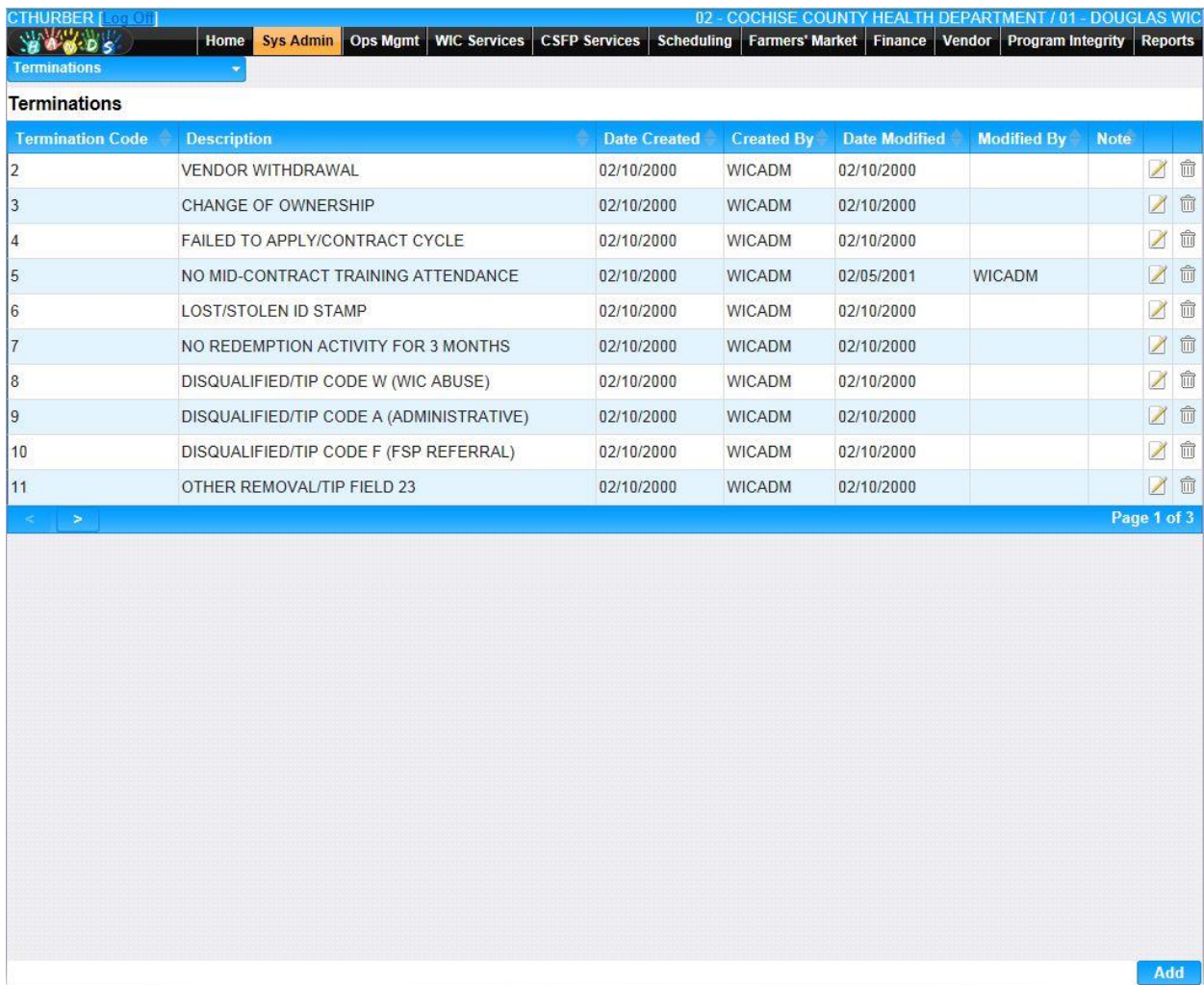
*Calculation(s): None*





















*Background Processes: None*

## 12.20 Terminations

The Terminations Base Table is used under the Vendor pages. It is used to populate the Termination Reason Drop Down used for Demographics | Authorizations add/edit. Current records for Terminations will appear in the Terminations Grid. The user can add further Terminations to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Terminations page.

Navigation Path: Sys Admin | Vendor Base Tables | Terminations



Termination Code	Description	Date Created	Created By	Date Modified	Modified By	Note	
2	VENDOR WITHDRAWAL	02/10/2000	WICADM	02/10/2000			 
3	CHANGE OF OWNERSHIP	02/10/2000	WICADM	02/10/2000			 
4	FAILED TO APPLY/CONTRACT CYCLE	02/10/2000	WICADM	02/10/2000			 
5	NO MID-CONTRACT TRAINING ATTENDANCE	02/10/2000	WICADM	02/05/2001	WICADM		 
6	LOST/STOLEN ID STAMP	02/10/2000	WICADM	02/10/2000			 
7	NO REDEMPTION ACTIVITY FOR 3 MONTHS	02/10/2000	WICADM	02/10/2000			 
8	DISQUALIFIED/TIP CODE W (WIC ABUSE)	02/10/2000	WICADM	02/10/2000			 
9	DISQUALIFIED/TIP CODE A (ADMINISTRATIVE)	02/10/2000	WICADM	02/10/2000			 
10	DISQUALIFIED/TIP CODE F (FSP REFERRAL)	02/10/2000	WICADM	02/10/2000			 
11	OTHER REMOVAL/TIP FIELD 23	02/10/2000	WICADM	02/10/2000			 


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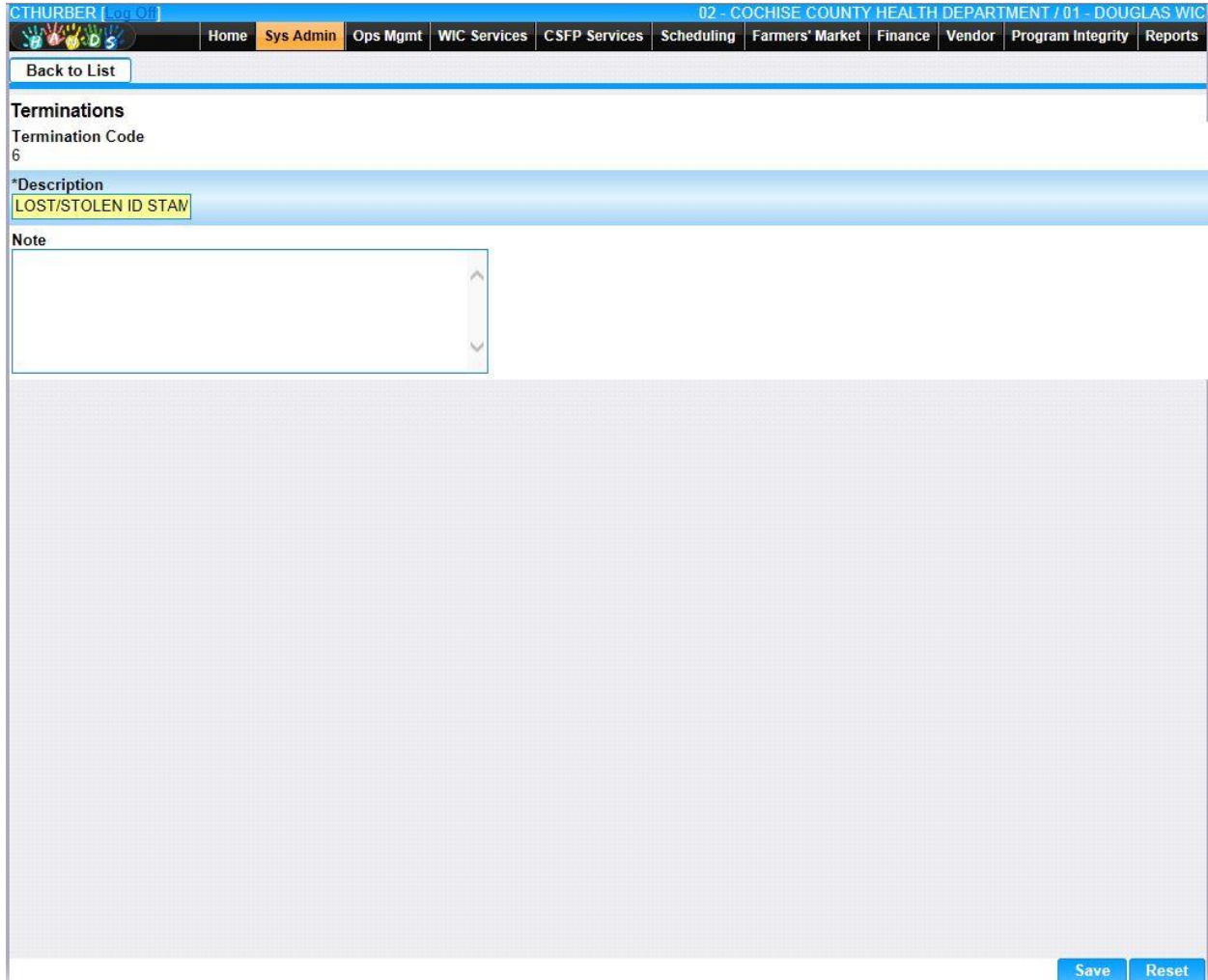
[Add](#)


Figure: Terminations

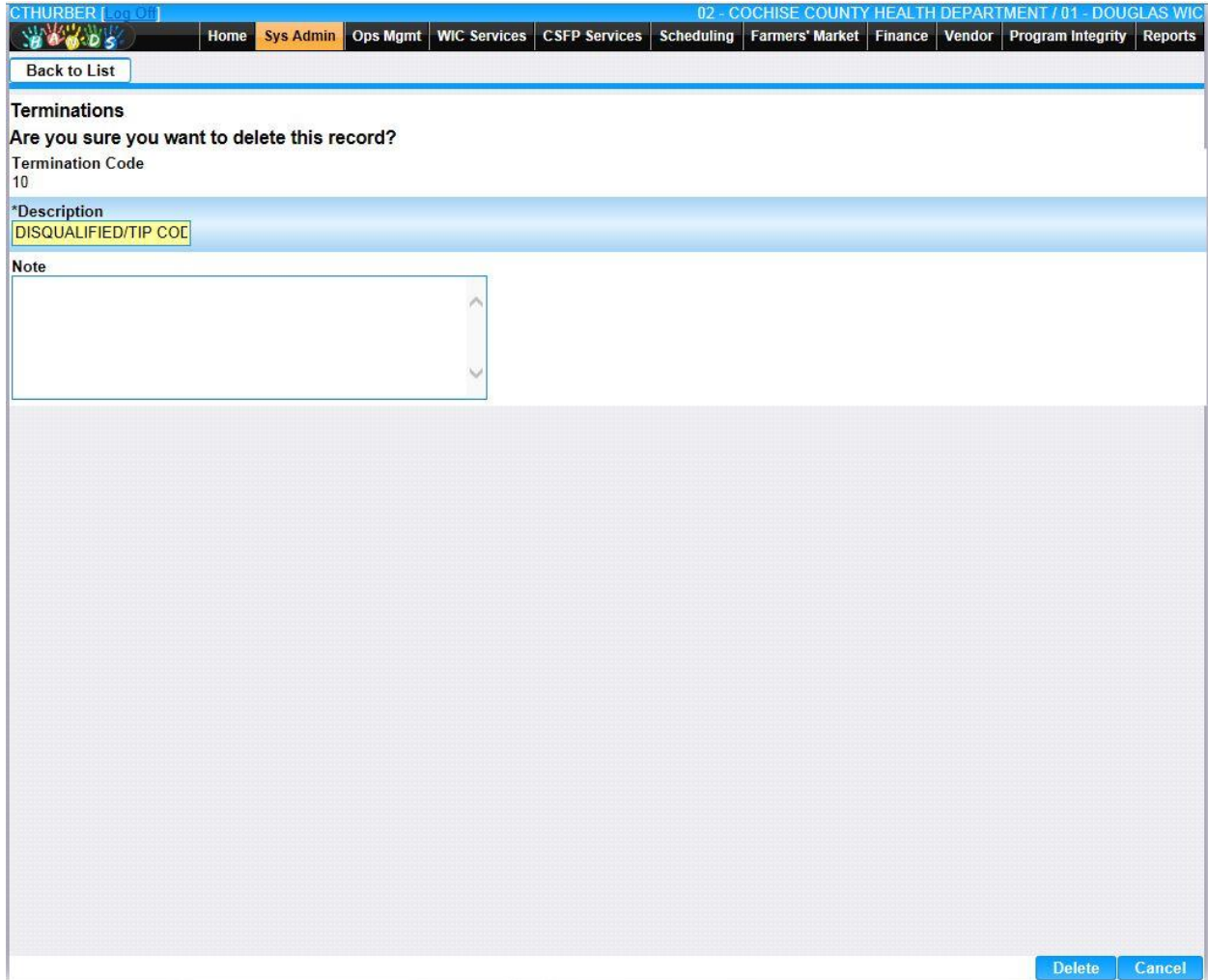
Fields:

- **Termination Code** – A code used to uniquely identify the type of Termination reason.
- **Description** – The description of the Termination Code.

- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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



*Buttons:*

- **Add** – When selected focus is passed to the Add Terminations page.



The screenshot shows a web application interface for 'Terminations'. At the top, there is a navigation bar with the user name 'CTHURBER [log off]' and the system title '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. Below this is a menu with options: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. A 'Back to List' button is located below the menu. The main form area is titled 'Terminations' and contains three sections: '\*Termination Code' with a text input field containing '0', '\*Description' with a text input field, and 'Note' with a large text area. At the bottom right of the form, there are two buttons: 'Save' and 'Reset'.

*Calculation(s): None*

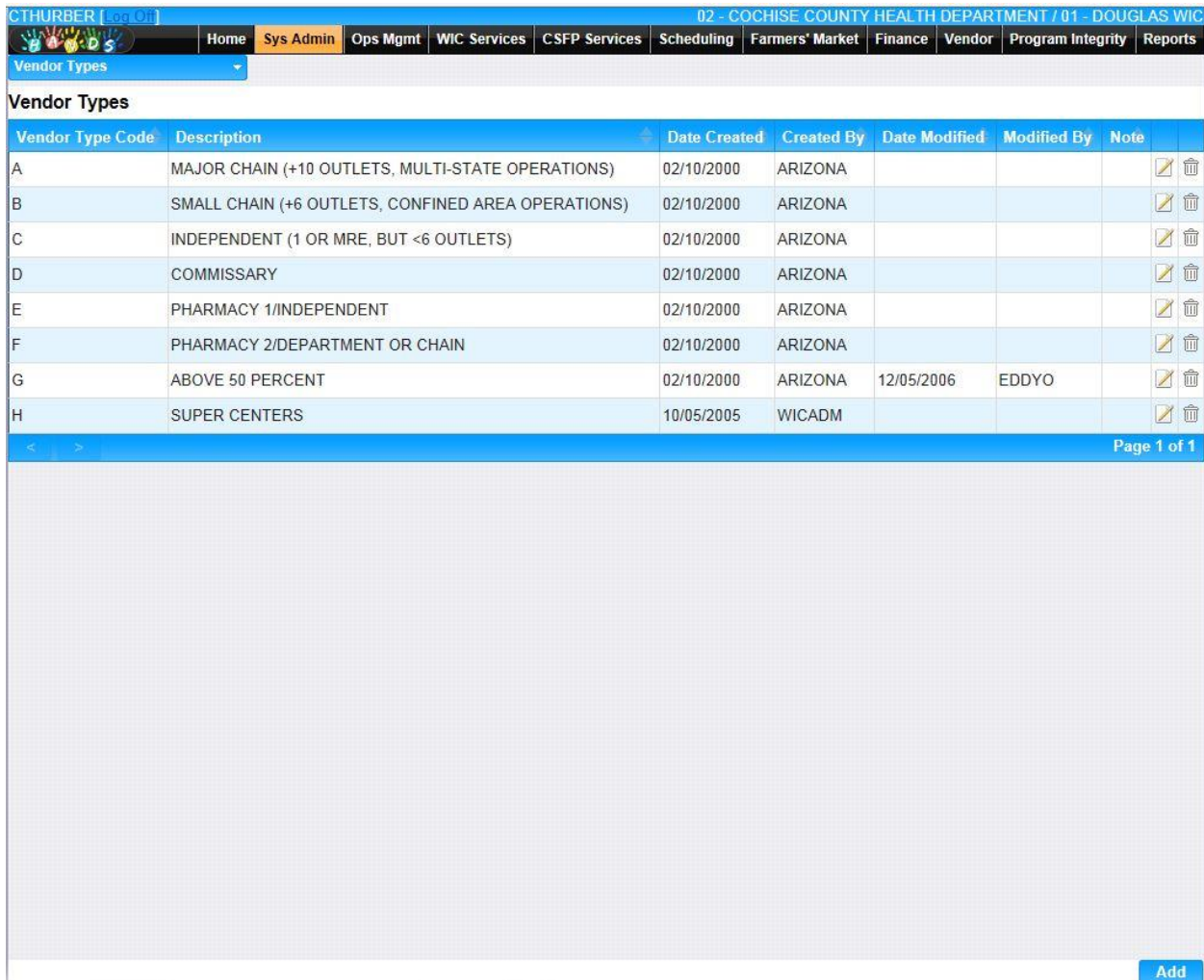
*Background Processes: None*



## 12.21 Vendor Types

The Vendor Types Base Table is used under the Vendors pages. It is used to populate the Vendor Type for Demographic | General add/edit. Current records for Vendor Types will appear in the Vendor Types Grid. The user can add further Vendor Types to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Vendor Types page.

Navigation Path: Sys Admin / Vendor Base Tables / Vendor Types



Vendor Type Code	Description	Date Created	Created By	Date Modified	Modified By	Note
A	MAJOR CHAIN (+10 OUTLETS, MULTI-STATE OPERATIONS)	02/10/2000	ARIZONA			
B	SMALL CHAIN (+6 OUTLETS, CONFINED AREA OPERATIONS)	02/10/2000	ARIZONA			
C	INDEPENDENT (1 OR MRE, BUT <6 OUTLETS)	02/10/2000	ARIZONA			
D	COMMISSARY	02/10/2000	ARIZONA			
E	PHARMACY 1/INDEPENDENT	02/10/2000	ARIZONA			
F	PHARMACY 2/DEPARTMENT OR CHAIN	02/10/2000	ARIZONA			
G	ABOVE 50 PERCENT	02/10/2000	ARIZONA	12/05/2006	EDDYO	
H	SUPER CENTERS	10/05/2005	WICADM			


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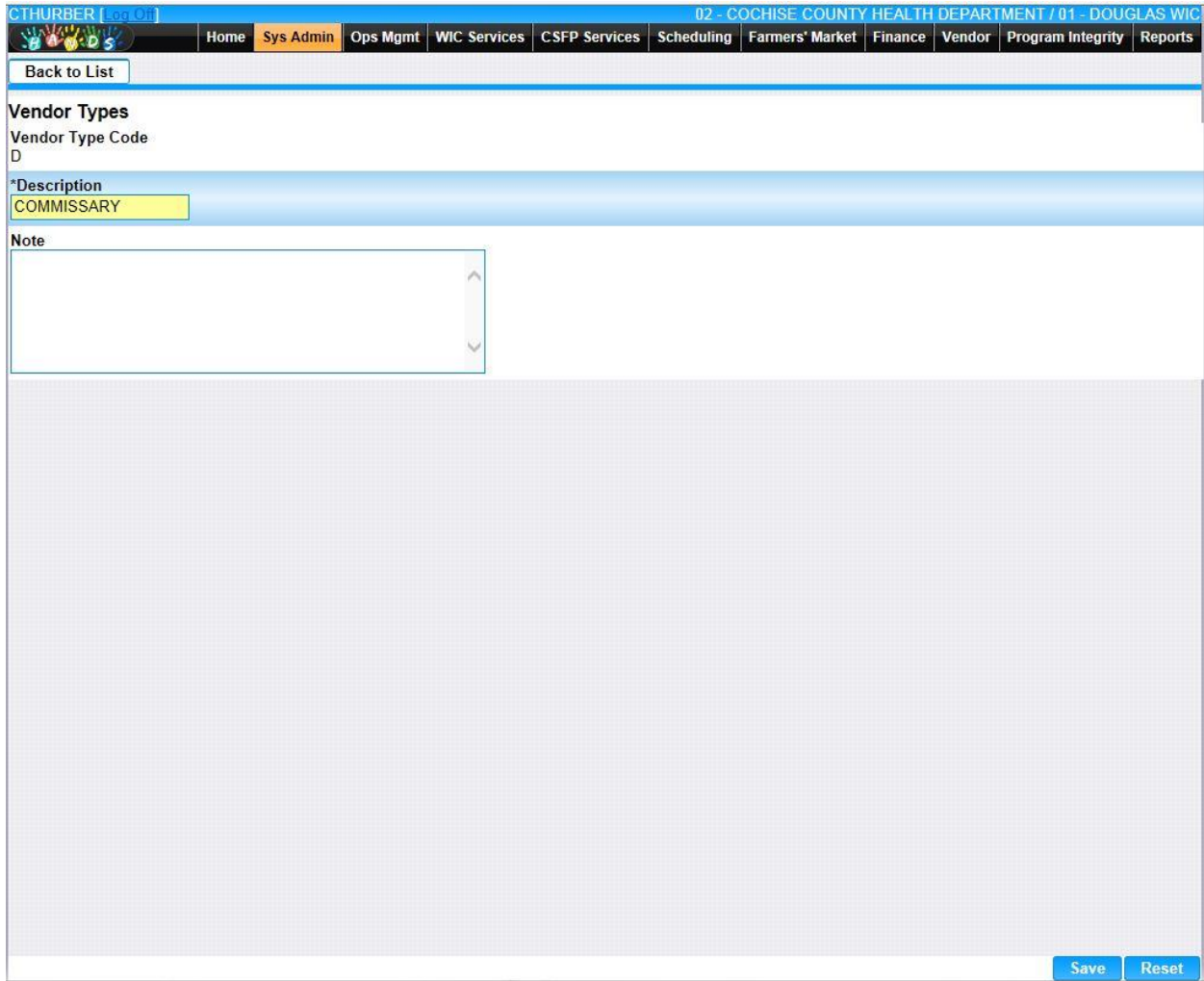
Add

Figure: Vendor Types

### Fields:

- **Vendor Type Code** – A code used to uniquely identify the Vendor Type.
- **Description** – The description of the Vendor Type Code.
- **Date Created** – The date the record was first added to the system.

- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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**Vendor Types**

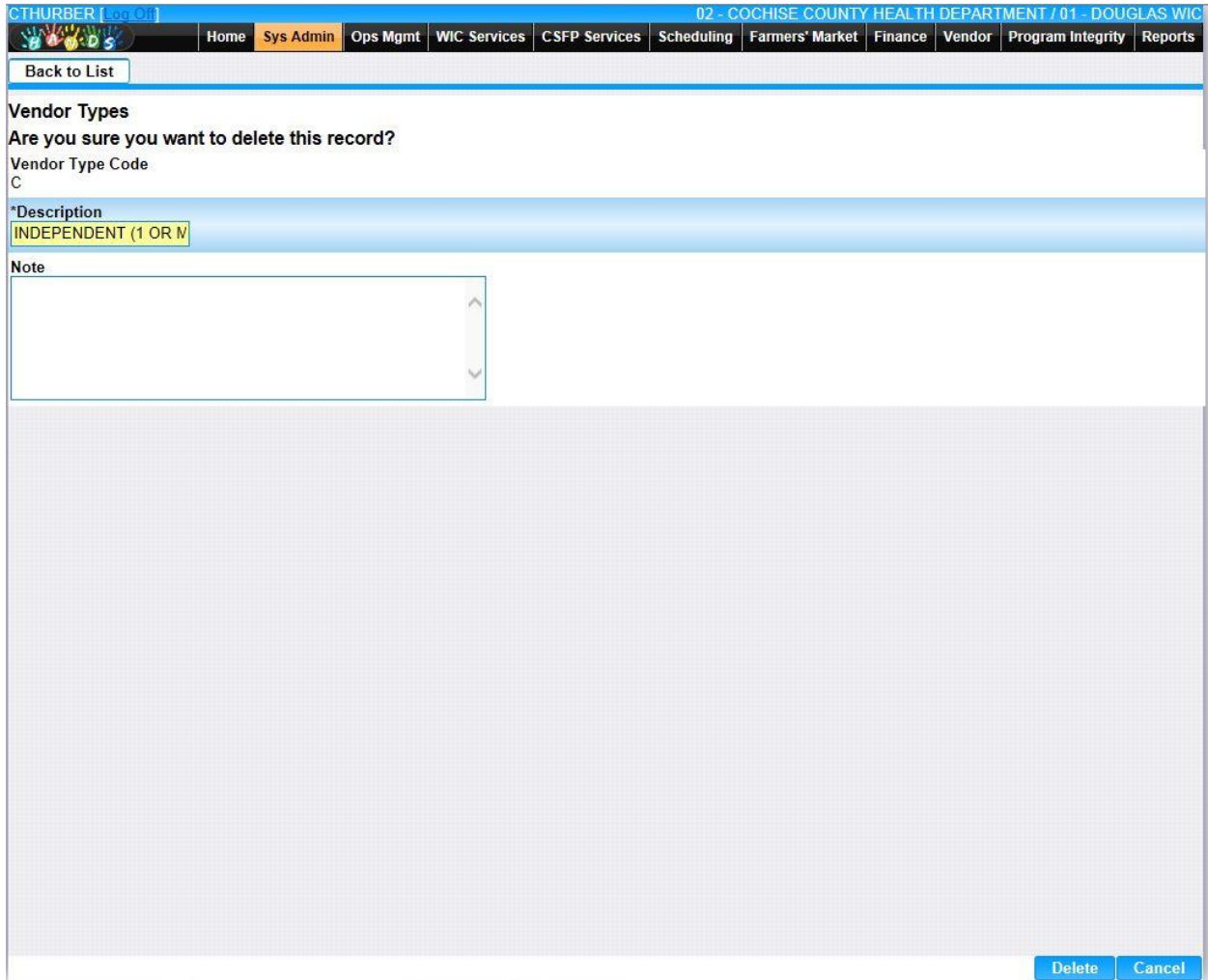
Vendor Type Code  
D

\*Description  
COMMISSARY

Note

Save Reset

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



*Buttons:*



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

The screenshot displays the 'Add Vendor Types' page. At the top, there is a navigation bar with the user 'CTHURBER' and the system name '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. The navigation menu includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. Below the navigation bar is a 'Back to List' button. The main content area is titled 'Vendor Types' and contains three input fields: '\*Vendor Type Code', '\*Description', and 'Note'. The 'Note' field is a text area. At the bottom right of the form are 'Save' and 'Reset' buttons.

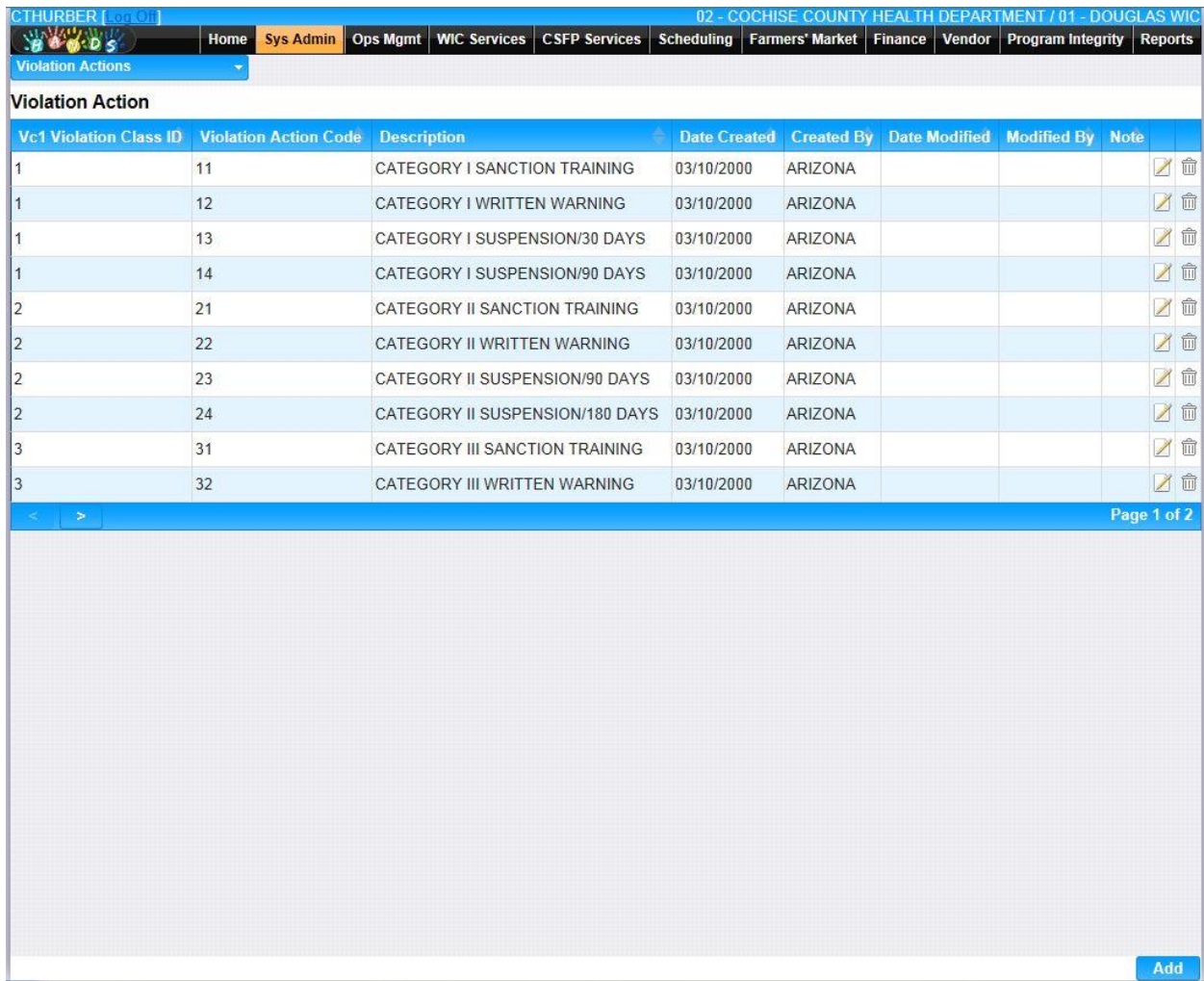
*Calculation(s): None*

*Background Processes: None*

### 12.22 Violation Actions

Current records for Violation Actions will appear in the Violation Actions Grid. The user can add further Violation Actions to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**), unless the violation has ever been issued against a vendor. The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Violation Actions page.

Navigation Path: Sys Admin / Vendor Base Tables / Violation Actions
























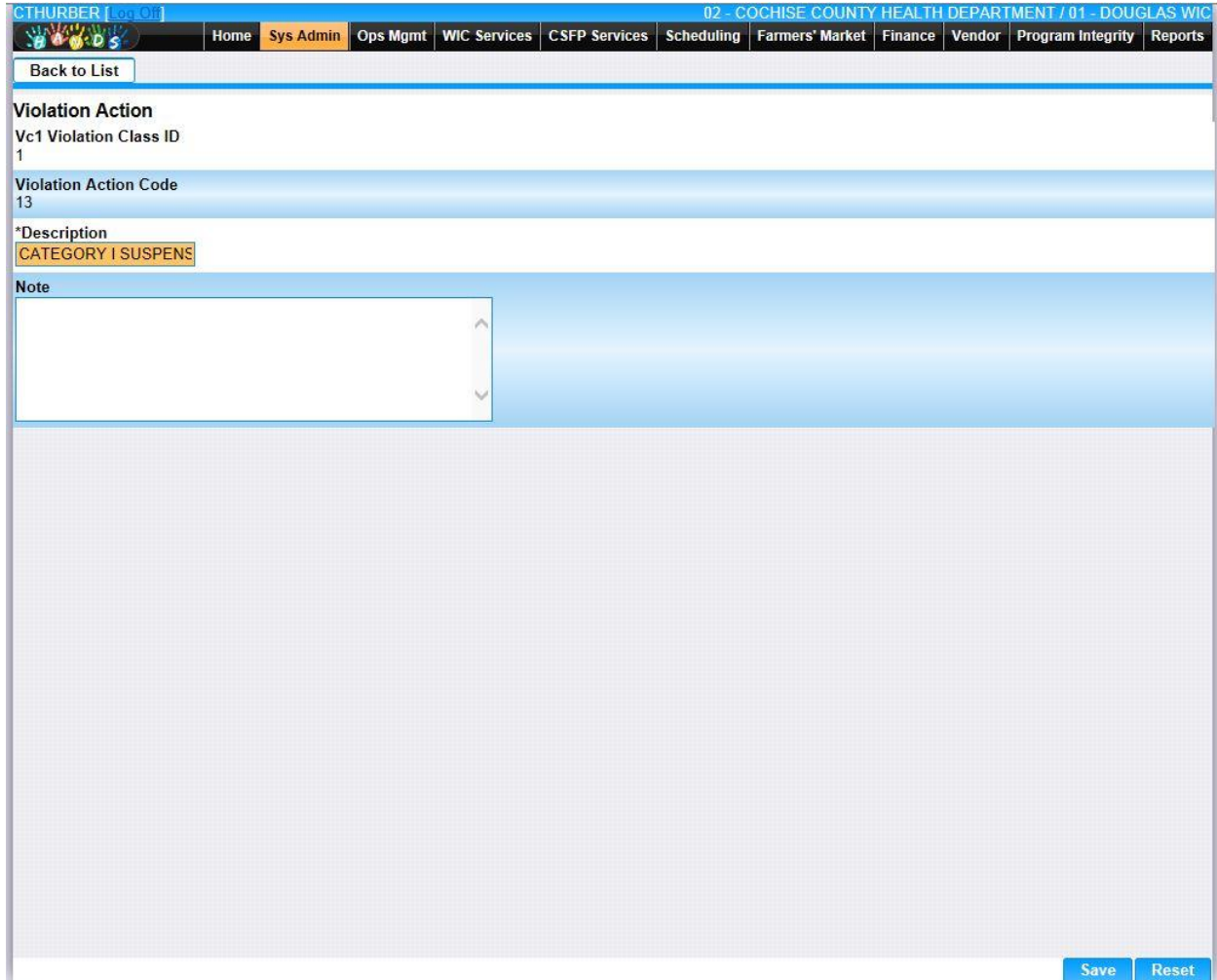
Vc1 Violation Class ID	Violation Action Code	Description	Date Created	Created By	Date Modified	Modified By	Note	
1	11	CATEGORY I SANCTION TRAINING	03/10/2000	ARIZONA				 
1	12	CATEGORY I WRITTEN WARNING	03/10/2000	ARIZONA				 
1	13	CATEGORY I SUSPENSION/30 DAYS	03/10/2000	ARIZONA				 
1	14	CATEGORY I SUSPENSION/90 DAYS	03/10/2000	ARIZONA				 
2	21	CATEGORY II SANCTION TRAINING	03/10/2000	ARIZONA				 
2	22	CATEGORY II WRITTEN WARNING	03/10/2000	ARIZONA				 
2	23	CATEGORY II SUSPENSION/90 DAYS	03/10/2000	ARIZONA				 
2	24	CATEGORY II SUSPENSION/180 DAYS	03/10/2000	ARIZONA				 
3	31	CATEGORY III SANCTION TRAINING	03/10/2000	ARIZONA				 
3	32	CATEGORY III WRITTEN WARNING	03/10/2000	ARIZONA				 

Figure: Violation Actions

Fields:

- **Vc1 Violation Class ID** – A class of violation, based on a range of sanction points.
- **Violation Action Code** – The violation action code indicating Recommended Actions against the Vendor.


- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.
- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.

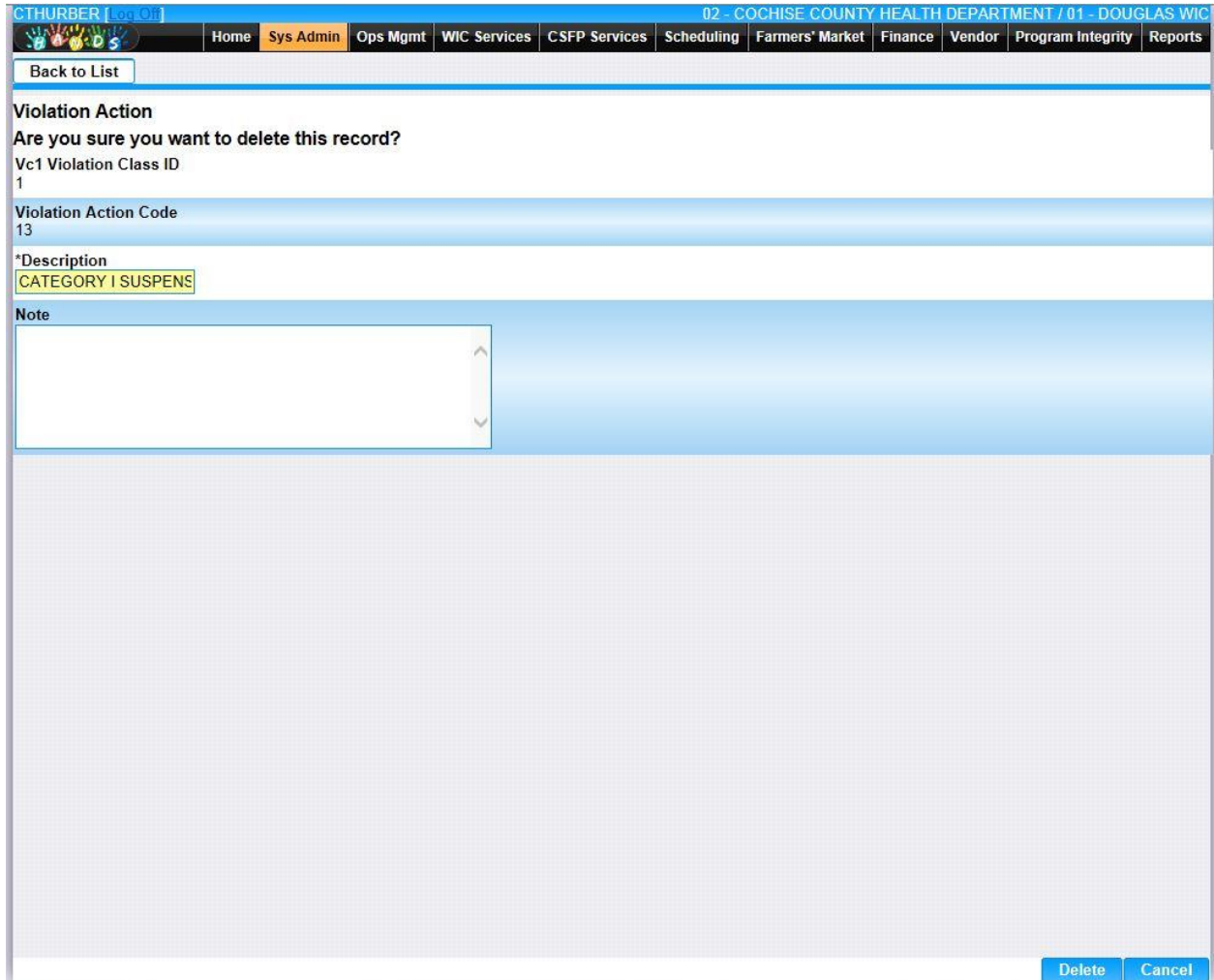


The screenshot shows a web application interface for editing a record. At the top, there is a navigation bar with the user name 'CTHURBER' and a 'Log Off' link. The main navigation menu includes 'Home', 'Sys Admin', 'Ops Mgmt', 'WIC Services', 'CSFP Services', 'Scheduling', 'Farmers' Market', 'Finance', 'Vendor', 'Program Integrity', and 'Reports'. Below the navigation bar is a 'Back to List' button. The main content area is titled 'Violation Action' and contains the following fields:

- Vc1 Violation Class ID**: 1
- Violation Action Code**: 13
- \*Description**: CATEGORY I SUSPENS
- Note**: A large, empty text area for entering notes.

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

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



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**Violation Action**  
Are you sure you want to delete this record?

Vc1 Violation Class ID  
1

Violation Action Code  
13

\*Description  
CATEGORY I SUSPENS

Note

Delete Cancel

*Buttons:*

- **Add** – When selected focus is passed to the Add Violation Actions page.

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

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**Violation Action**

\*Vc1 Violation Class ID  
NOT SET

\*Violation Action Code  
0

\*Description

Note



Save Reset

*Calculation(s): None*

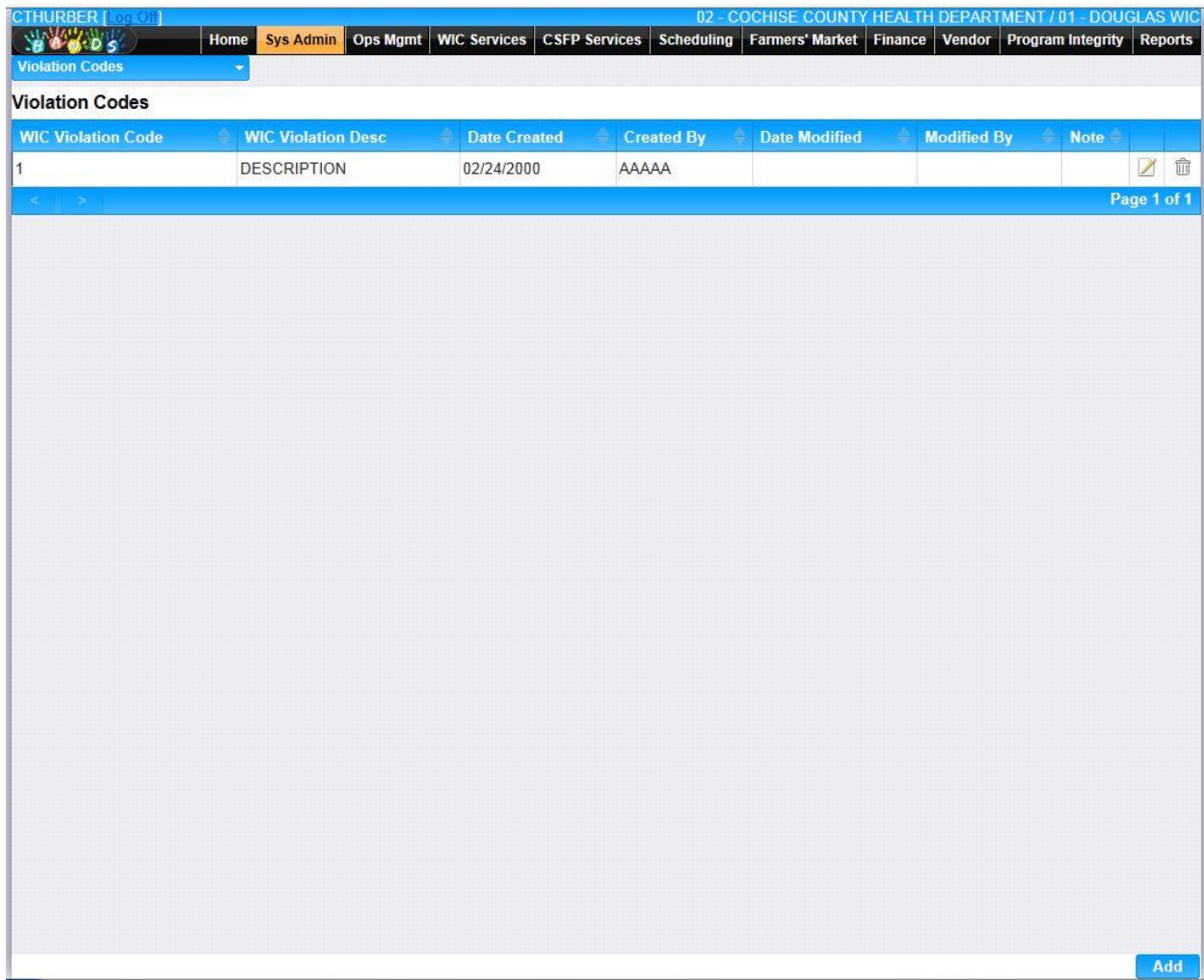
*Background Processes: None*



### 12.23 Violation Codes

Current records for Violation Codes will appear in the Violation Codes Grid. The user can add further Violation Codes to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the Violation Codes page.


*Navigation Path: Sys Admin / Vendor Base Tables / Violation Codes*

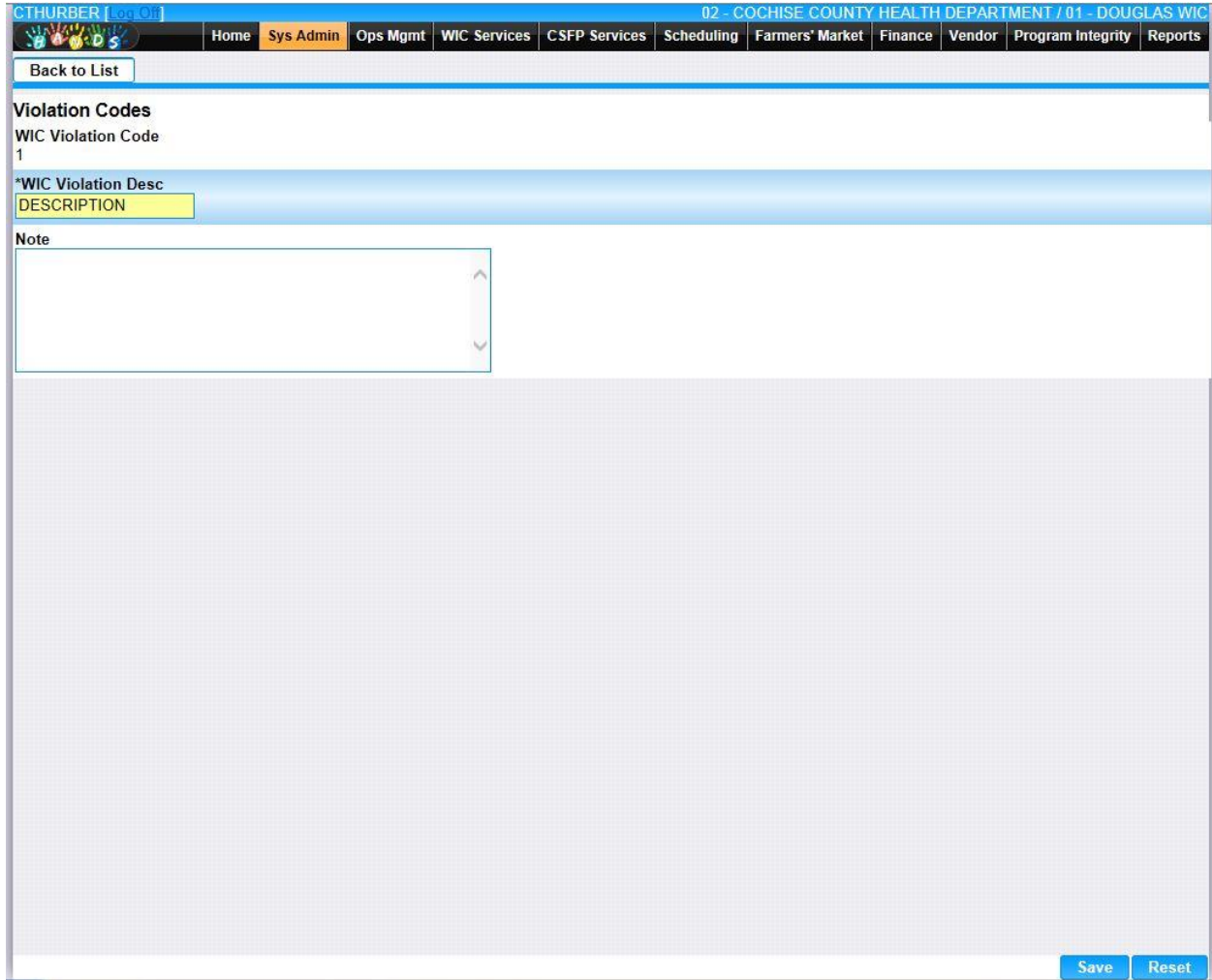



*Figure : Violation Codes*

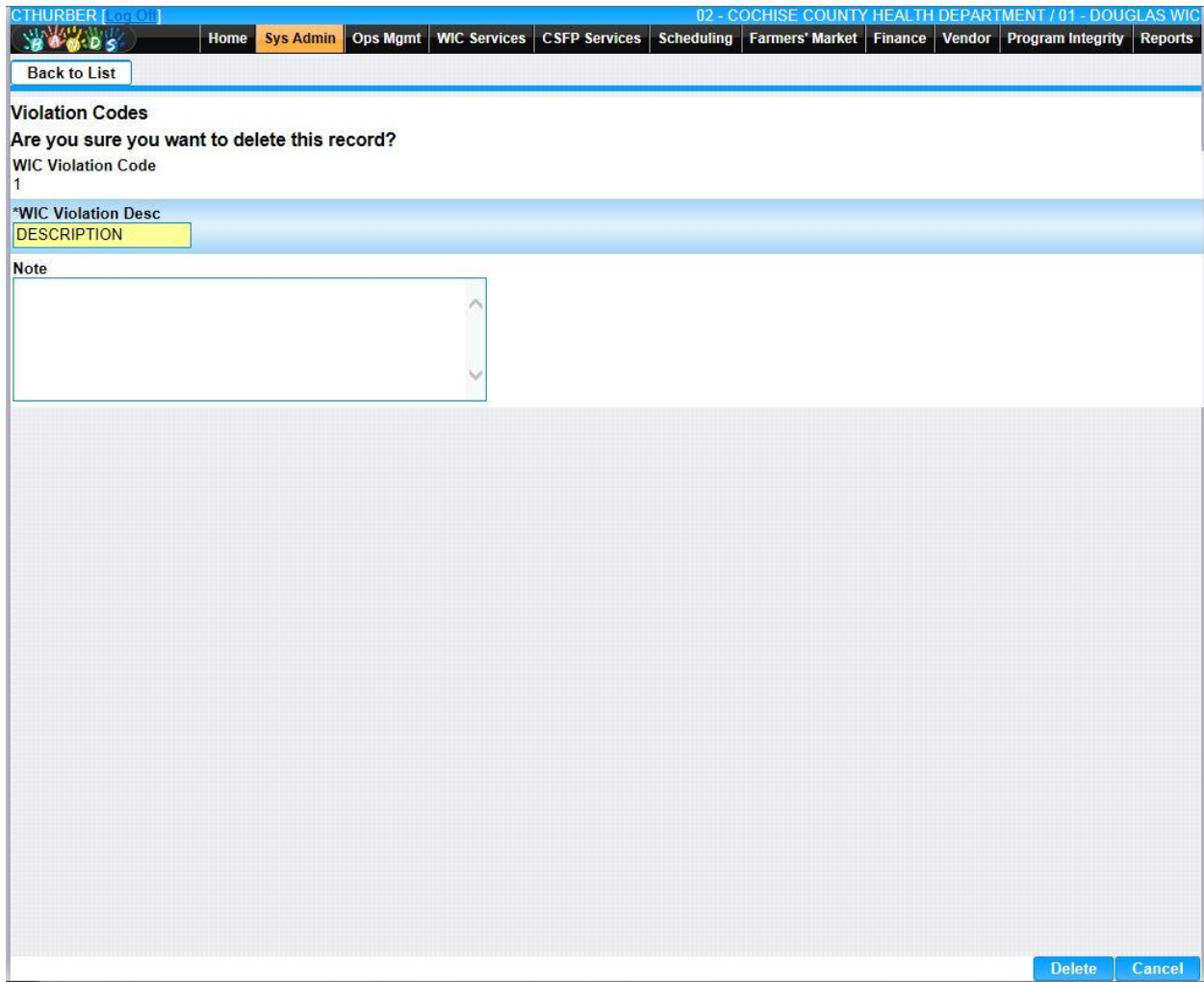
*Fields:*

- **WIC Violation Code** – A code to represent the WIC Violation Code.
- **WIC Violation Desc** – The description of the WIC Violation Code.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.

- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



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



*Buttons:*



- **Add** – When selected focus is passed to the Add Violation Codes page.

The screenshot shows a web application interface for adding violation codes. At the top, there is a navigation bar with the user name 'CTHURBER [Log Off]' and the system title '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. Below this is a menu with options: Home, Sys Admin (highlighted), Ops Mgmt, WIC Services, C.SFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. A 'Back to List' button is located below the menu. The main content area is titled 'Violation Codes' and contains three input fields: '\*WIC Violation Code' with the value '0', '\*WIC Violation Desc', and a 'Note' text area. At the bottom right of the page, there are 'Save' and 'Reset' buttons.

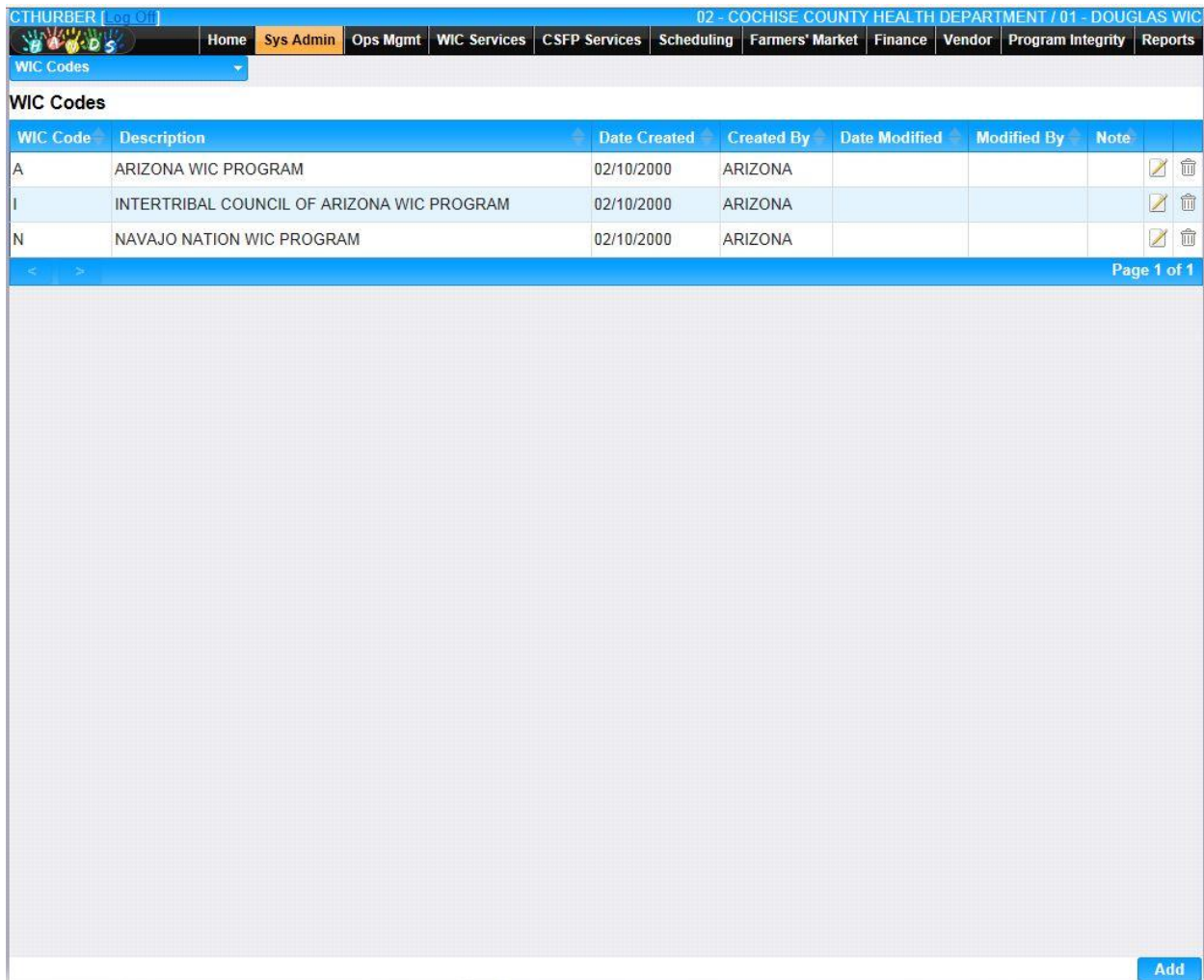
*Calculation(s): None*







*Background Processes: None*

## 12.24 WIC Codes

Current records for WIC Codes will appear in the WIC Codes Grid. The user can add further WIC Codes to this Base Table by pressing the Add button. If any entry is modified via the  (**Edit Icon**), the Date Modified and Modified By fields are populated. Also, a record can be removed from the system by using the  (**Delete Icon**). The informative message, “Record saved successfully” appears in yellow when no errors have occurred during the Save. See the Figure below, which shows the WIC Codes page.

*Navigation Path: Sys Admin / Vendor Base Tables / WIC Codes*



WIC Code	Description	Date Created	Created By	Date Modified	Modified By	Note		
A	ARIZONA WIC PROGRAM	02/10/2000	ARIZONA					
I	INTERTRIBAL COUNCIL OF ARIZONA WIC PROGRAM	02/10/2000	ARIZONA					
N	NAVAJO NATION WIC PROGRAM	02/10/2000	ARIZONA					


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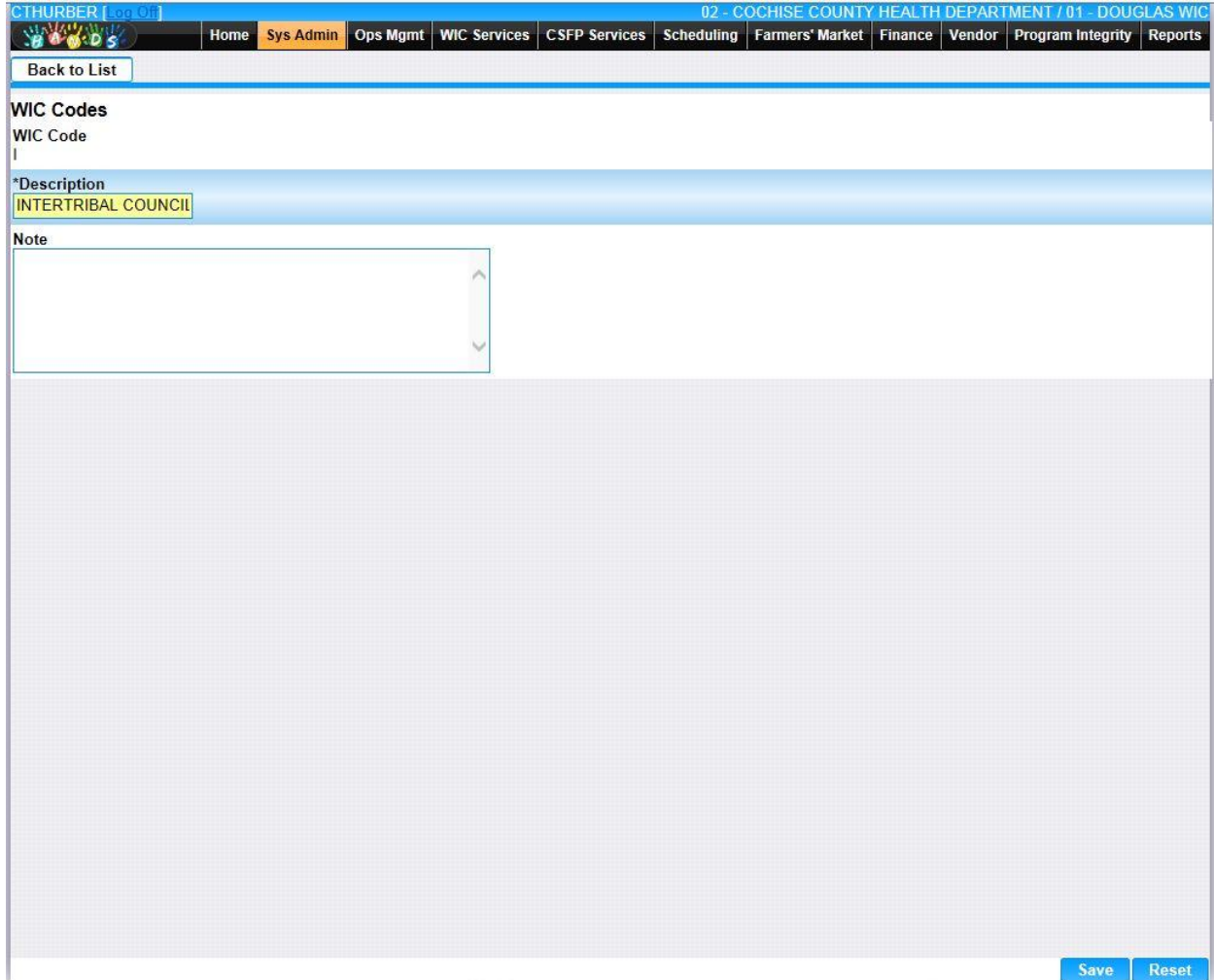
[Add](#)

*Figure: WIC Codes*

### Fields:

- **WIC Code** – A code to represent the WIC Violation Code.
- **Description** – The description of the WIC Violation Code.
- **Date Created** – The date the record was first added to the system.
- **Created By** – The User ID of the author who added the record.

- **Date Modified** – The date when the record was last revised.
- **Modified By** – The User ID of the author who last revised the record.
- **Note** – A free text field used for storing notes specific to the record.
-  **(Edit Icon)** – When selected navigation will switch to the Edit Screen pre-populated with the details of the record for editing.



CTHURBER [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

Back to List


**WIC Codes**

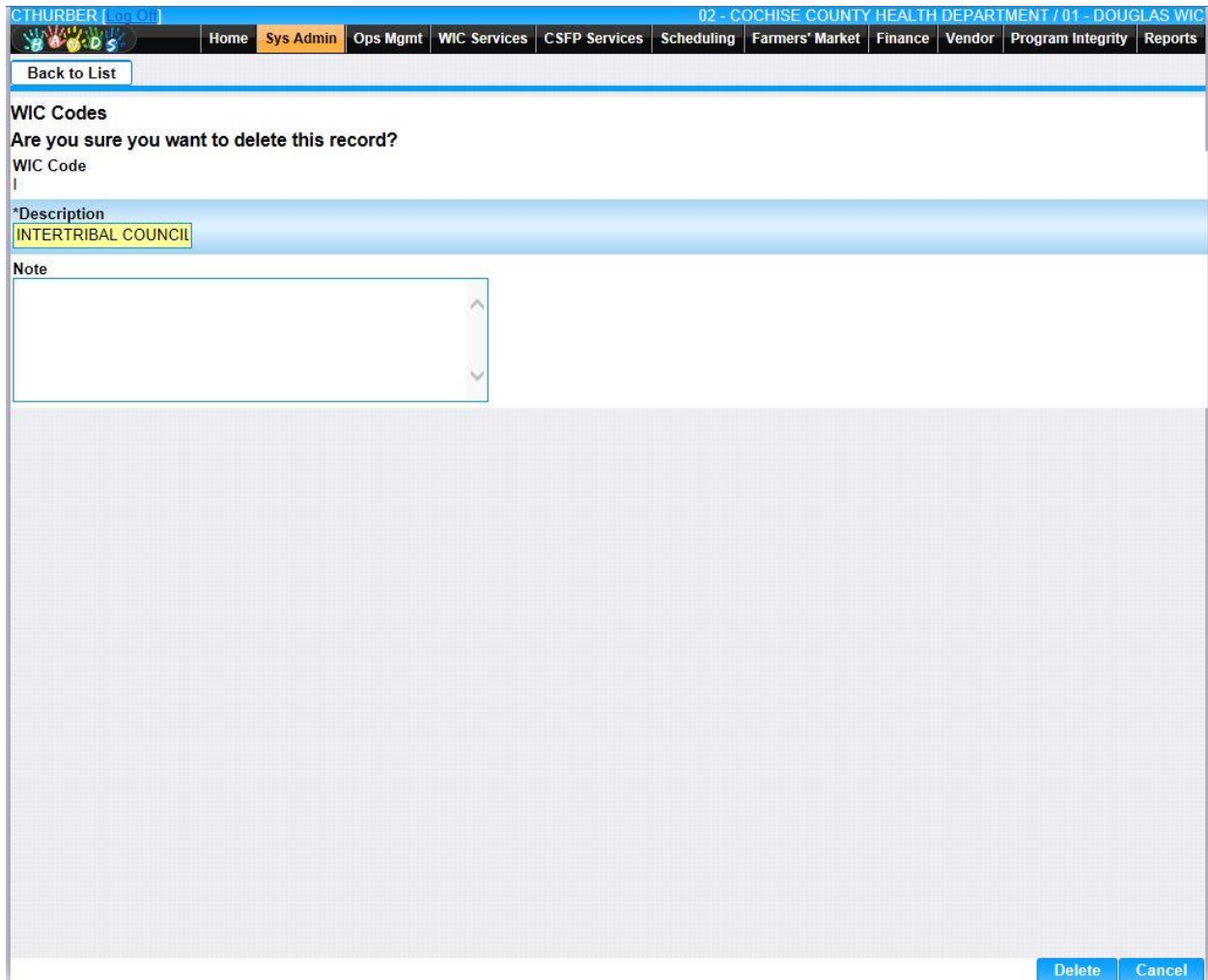
WIC Code  
I

\*Description  
INTERTRIBAL COUNCIL

Note

Save Reset

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



*Buttons:*

- **Add** – When selected focus is passed to the Add WIC Codes page.

The screenshot shows a web application interface for adding WIC codes. At the top, there is a navigation bar with the user name 'CTHURBER [Log Off]' and the page title '02 - COCHISE COUNTY HEALTH DEPARTMENT / 01 - DOUGLAS WIC'. Below the navigation bar are several menu items: Home, Sys Admin, Ops Mgmt, WIC Services, CSFP Services, Scheduling, Farmers' Market, Finance, Vendor, Program Integrity, and Reports. The main content area is titled 'WIC Codes' and contains three input fields: '\*WIC Code', '\*Description', and 'Note'. The 'WIC Code' and 'Description' fields are highlighted in yellow. The 'Note' field is a larger text area with a scroll bar. At the bottom right of the form, there are two buttons: 'Save' and 'Reset'.

*Calculation(s): None*

*Background Processes: None*