

Table of Contents

Section 5 - 1	Update.....	1
Section 5 - 1.1	Update Operations Information	1
Section 5 - 1.1.1	Update Staff Data.....	1
Section 5 - 1.1.1.1	Staff Data - Main	1
Section 5 - 1.1.1.2	Staff Data - Main 2	3
Section 5 - 1.1.1.3	Staff Data-Phone popup	4
Section 5 - 1.1.1.4	Staff Data-Languages popup	4
Section 5 - 1.1.1.5	Staff Data-Training popup.....	5
Section 5 - 1.1.2	Update Organizational Units Information.....	6
Section 5 - 1.1.2.1	Organizational Units.....	6
Section 5 - 1.1.2.2	Organizational Units-Contact Info popup	8
Section 5 - 1.1.2.3	Organizational Units-Contact Info-Phone popup	9
Section 5 - 1.1.2.4	Organizational Units-Phone popup	9
Section 5 - 1.1.2.5	Organizational Units-Programs & Outreach Referral Organizations popup ..	10
Section 5 - 1.1.2.6	Organizational Units-Organizational Unit Characteristics	11
Section 5 - 1.1.3	Update Outreach / Referral Organizations.....	12
Section 5 - 1.1.3.1	Outreach / Referral Organizations.....	12
Section 5 - 1.1.3.2	Outreach / Referral Organizations – Local Agencies popup	13
Section 5 - 1.1.3.3	Outreach / Referral Organizations-Communications popup	14
Section 5 - 1.1.3.4	Outreach / Referral Organizations-Program Category popup	14
Section 5 - 1.1.3.5	Referral Organizations-Phone popup	14
Section 5 - 1.1.4	Update Programs.....	16
Section 5 - 1.1.4.1	Program Categories	16
Section 5 - 1.1.5	Update Time Study - Daily Log.....	17
Section 5 - 1.1.5.1	Time Study - Daily Log.....	17
Section 5 - 1.1.6	Update Annual WIC Cost Summary.....	19
Section 5 - 1.1.6.1	Annual WIC Cost Summary.....	19
Section 5 - 2	Tables	21
Section 5 - 2.1	Update Table Information.....	21
Section 5 - 2.1.1	Update Outreach / Referral Organization Types.....	21
Section 5 - 2.1.1.1	Maintain Outreach / Referral Organization Types	21
Section 5 - 2.1.2	Update Outreach / Referral Communication Types.....	22
Section 5 - 2.1.2.1	Maintain Outreach / Referral Communication Types	22
Section 5 - 2.1.3	Update Staff Titles	23
Section 5 - 2.1.3.1	Maintain Staff Titles.....	23
Section 5 - 2.1.4	Update Title Categories	24
Section 5 - 2.1.4.1	Maintain Title Categories	24
Section 5 - 3	Outputs	25
Section 5 - 3.1	Labels.....	25
Section 5 - 3.1.1	Creating Outreach / Referral Organization Mailing Labels.....	25
Section 5 - 3.1.1.1	Outreach / Referral Organization Labels Parameter.....	25
Section 5 - 3.1.1.2	Outreach / Referral Organization Labels Report.....	26
Section 5 - 3.1.2	Creating Agency Mailing Labels	27
Section 5 - 3.1.2.1	Agency Labels Parameter.....	27
Section 5 - 3.2	Reports.....	29

Section 5 - 3.2.1	Producing a Local Agency Directory.....	29
Section 5 - 3.2.1.1	Local Agency Directory Parameter	29
Section 5 - 3.2.1.2	Local Agency Directory Internal & External Reports.....	29
Section 5 - 3.2.2	Producing a Local Agency Staff Listing.....	31
Section 5 - 3.2.2.1	Local Agency Staff Listing Parameter	31
Section 5 - 3.2.2.2	Local Agency Staff Listing Report.....	31
Section 5 - 3.2.3	Producing an Outreach / Referral Organization Listing	33
Section 5 - 3.2.3.1	Outreach / Referral Organization Listing Parameter	33
Section 5 - 3.2.3.2	Outreach / Referral Organization Listing Report	33
Section 5 - 3.2.4	Producing Nutrition Education Contacts Report	35
Section 5 - 3.2.4.1	Nutrition Education Contacts Parameter	35
Section 5 - 3.2.4.2	Nutrition Education Contacts Summary / Summary & Detail Report	35
Section 5 - 3.2.5	Producing a Nutrition Education Monitoring Report.....	37
Section 5 - 3.2.5.1	Nutrition Education Monitoring Parameter	37
Section 5 - 3.2.5.2	Nutrition Education Monitoring Report	37
Section 5 - 3.2.6	Producing a FNS 648 Local Agency Directory	39
Section 5 - 3.2.6.1	FNS 648 Local Agency Directory Parameter	39
Section 5 - 3.2.6.2	FNS 648 Local Agency Directory Report	39
Section 5 - 3.2.7	Producing a To/From WIC Referrals Report.....	40
Section 5 - 3.2.7.1	To / From WIC Referrals Parameter	40
Section 5 - 3.2.7.2	To / From WIC Referrals Report.....	40
Section 5 - 3.2.8	Producing a Food Instrument Usage Report.....	41
Section 5 - 3.2.8.1	Food Instrument Usage Parameter	41
Section 5 - 3.2.8.2	Food Instrument Usage Detail and Summary Report.....	41
Section 5 - 3.2.8.3	Food Instrument Usage Summary Report	41
Section 5 - 3.2.9	Producing a Participant Status Report	42
Section 5 - 3.2.9.1	WIC Participant Status Parameter	42
Section 5 - 3.2.9.2	WIC Participant Status Report	42
Section 5 - 3.2.9.3	CSF Participant Status Parameter.....	43
Section 5 - 3.2.9.4	CSF Participant Status Report	43
Section 5 - 3.2.10	Producing a Time Study Summary Report	44
Section 5 - 3.2.10.1	Time Study Summary Parameter.....	44
Section 5 - 3.2.10.2	Time Study Summary Report.....	44
Section 5 - 3.2.11	Producing a Personnel Costs Summary Report	46
Section 5 - 3.2.11.1	Personnel Costs Summary Parameter.....	46
Section 5 - 3.2.11.2	Personnel Costs Summary Report	46
Section 5 - 3.2.12	Producing an Annual WIC Cost Summary Sheet	48
Section 5 - 3.2.12.1	Annual WIC Cost Summary Sheet Parameter.....	48
Section 5 - 3.2.12.2	Annual WIC Cost Summary Sheet Report	48
Section 5 - 3.2.13	Producing a Local Agency Annual Report	50

Operations Management

Section 5: Operations Management

Section 5 - 1 Update

Section 5 - 1.1 Update Operations Information

Section 5 - 1.1.1 Update Staff Data

Section 5 - 1.1.1.1 Staff Data - Main

Form: os_mtn_staff_data

Fields

Staff ID - O_STAFF_MEMBERS.STAFF_MEMBER_ID

This field is mandatory.

This field is system generated and 5 digits in length.

See background processes for system generation.

Position # - O_STAFF_MEMBERS.POSITION_NUMBER

This field is optional.

This field is alpha-numeric and 10 digits in length. Two different Staff IDs may be assigned the same Position#.

Last Name - O_STAFF_MEMBERS.LAST_NAME

This field defaults to 'vacant' if the vacant check box is checked.

This field is mandatory.

First Name - O_STAFF_MEMBERS.FIRST_NAME

This field defaults to 'vacant' if the vacant check box is checked.

This field is optional.

MI1 - O_STAFF_MEMBERS.MI1

This field is optional.

MI2 - O_STAFF_MEMBERS.MI2

This field is optional.

Initials - Calculated from O_STAFF_MEMBERS.FIRST_NAME,

O_STAFF_MEMBERS.LAST_NAME,

O_STAFF_MEMBERS.MI1, O_STAFF_MEMBERS.MI2

This field is display only.

Educational/Professional Suffix - O_STAFF_MEMBERS.ED_PROF_TITLES.

This field is optional.

Alias - O_STAFF_MEMBERS.ALIAS

This field is mandatory.

Street Address - O_STAFF_MEMBERS.ADDRESS1

This field is mandatory.

O_STAFF_MEMBERS.ADDRESS2

This field is optional.

City - S_GEO_LOCATIONS.SC_DESCRIPTION

Used to populate O_STAFF_MEMBERS.SGEO_GEO_LOCATION_ID

Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID

Low: s_geo_locations. Lov is used for validation.

This field is mandatory.

County - S_COUNTIES.DESCRPTION from S_GEO_LOCATIONS.SC4_COUNTY_CODE

Generated from O_STAFF_MEMBERS.SGEO_GEO_LOCATION_ID

Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID

This field is display only.

State - S_GEO_LOCATIONS.SS_STATE_ID

Generated from O_STAFF_MEMBERS.SGEO_GEO_LOCATION_ID

Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID

This field is display only.

Zip Code - S_GEO_LOCATIONS.SZ_ZIP5, O_STAFF_MEMBERS.ZIP4

Used to populate O_STAFF_MEMBERS.SGEO_GEO_LOCATION_ID

Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID

Lov : s_geo_locations. Lov is used for validation.

The ZIP5 field is mandatory, the ZIP4 field is optional.

E-Mail - O_STAFF_MEMBERS.EMAIL

This field is optional.

Comment - O_STAFF_MEMBERS.NOTE

This field is optional.

Program ID - O_JOB_DESCRIPTIONS.OP_PRG_PROGRAM_ID

Code table column O_PROGRAMS.PROGRAM_ID

Lov : o_programs. Lov is used for validation.

This field is mandatory.

Description - O_PROGRAMS.DESCRPTION

This field is display only.

Code - O_ORGANIZATIONAL_UNITS.ORG_CODE

The field is display only.

Organization - O_ORGANIZATIONAL_UNITS.NAME

This field is display only.

Title - O_JOB_DESCRIPTIONS.ST_STAFF_TITLE_CODE

Code table column O_STAFF_TITLES.STAFF_TITLE_CODE

Description is O_STAFF_TITLES.DESCRPTION

Lov: o_staff_titles. Lov is used for validation.

This field is mandatory.

Check Box(es)

Vacant - O_STAFF_MEMBERS.VACANT_FLAG

Pseudo - O_STAFF_MEMBERS.PSEUDO_FLAG

Non-WIC - O_STAFF_MEMBERS.NON_WIC_FLAG

Non-WIC Contractor - O_STAFF_MEMBER.NON_WIC_CONTR_FLAG

Local Agency Coordinator -O_STAFF_MEMBERS.LA_WIC_COORD_FLAG

Background Process(es)

Initials Field

The system uses the first letters of the information entered in the Last, First , MI1, and MI2 fields and displays them consecutively in this field. The system displays each of these letters where:

SM.INITIALS (non database table field) :=

SUBSTR(NVL(:O_STAFF_MEMBERS.FIRST_NAME,""),1,1)||

```
SUBSTR(NVL(:O_STAFF_MEMBERS.MI1,""),1,1)||  
SUBSTR(NVL(:O_STAFF_MEMBERS.MI2,""),1,1)||  
SUBSTR(NVL(:O_STAFF_MEMBERS.LAST_NAME,""),1,1);
```

Vacant Check Box

If O_STAFF_MEMBERS.VACANT_FLAG = 'Y'

Then O_STAFF_MEMBERS.FIRST_NAME and O_STAFF_MEMBERS.LAST_NAME are both set to 'vacant'.

Staff ID's

The system assigns different blocks of ID's to each of the 18 local agencies/clinics with each block containing 5,000 ID's to be distributed for the new staff members added into the system. For example, it will assign 00001 to 05000 for one agency then assign 05001 to 10000 for the next agency and so forth in the STAFF_MEMBER_SEQ field within the S_APPL_SEQUENCES base table. When the user adds a record, the system will check the agency for which the staff member is being added and then assigns the next available number for that agency by using a function that grabs the number from the S_APPL_SEQUENCES base table. This value is then displayed in the Staff ID field on the screen.

Section 5 - 1.1.1.2 Staff Data - Main 2

Form: os_mtn_staff_data

Fields

Salary - O_JOB_DESCRIPTIONS.HOURLY_SALARY

This field is mandatory.

ERE% - O_JOB_DESCRIPTIONS.ERE_PERCENT

This field is mandatory.

Start Date - O_JOB_DESCRIPTIONS.START_DATE

This field is required.

End Date - O_JOB_DESCRIPTIONS.END_DATE

This field is optional.

Hrs/Wk - O_JOB_DESCRIPTIONS.WEEKLY_HOURS

This field is mandatory.

FTE Base - O_JOB_DESCRIPTIONS.FTE_BASE

This field is display only and displays a value of '40' representing the number of hours worked for a full time worker.

FTE - Calculated from O_JOB_DESCRIPTIONS.WEEKLY_HOURS divided by
O_JOB_DESCRIPTIONS.FTE_BASE

This field is display only.

Check Box(es)

Home Org. - O_JOB_DESCRIPTIONS.HOME_ORG_FLAG

Background Process(es)

If the FTE Base is 0, then the FTE will not be calculated. Otherwise, the FTE is calculated to two decimal places.

Section 5 - 1.1.1.3 Staff Data-Phone popup*Fields***Phone Number** - O_STAFF_PHONES.PHONE_NUMBER

This field is optional.

Ext. - O_STAFF_PHONES.PHONE_EXTENSION

This field is optional.

Phone Type - O_STAFF_PHONES.SPT_PHONE_TYPE_CODE

Code table column S_PHONE_TYPES.PHONE_TYPE_CODE

Lov : s_phone_types. Lov is used for validation.

This field is mandatory if a phone number is filled in the phone number field.

Background Process(es)

None.

Section 5 - 1.1.1.4 Staff Data-Languages popup*Fields***Primary** - O_STAFF_MEMBERS.CL_LANGUAGE_CODE_PRIMARY

Code table column C_LANGUAGES.LANGUAGE_CODE

Description is C_LANGUAGES.DESCRPTION

Lov : c_languages. Lov is used for validation.

This field is mandatory.

Secondary - O_STAFF_MEMBERS.CL_LANGUAGE_CODE_SECONDARY

Code table column C_LANGUAGES.LANGUAGE_CODE

Description is C_LANGUAGES.DESCRPTION

Lov: c_languages. Lov is used for validation.

This field is optional.

Background Process(es)

None.

Section 5 - 1.1.1.5 Staff Data-Training popup*Fields***Date** - O_STAFF_TRAININGS.TRAINING_DATE

This field is optional.

Class Topic - O_STAFF_TRAININGS.CLASS_TOPIC

This field is optional.

Location - O_STAFF_TRAININGS.LOCATION

This field is optional.

Instructor - O_STAFF_TRAININGS.INSTRUCTOR

This field is optional.

Duration - O_STAFF_TRAININGS.DURATION

This field is optional.

Cost - O_STAFF_TRAININGS.COST

This field is optional.

*Check Box(es)***In-service** - O_STAFF_TRAININGS.IN_SERVICE_FLAG**Out-service** - O_STAFF_TRAININGS.OUT_SERVICE_FLAG**Nutr. Ed.** - O_STAFF_TRAININGS.NUTR_ED_FLAG**Other** - O_STAFF_TRAININGS.OTHER_FLAG*Push Button(s)***Next Class** - Queries the O_STAFF_TRAININGS table for the TRAINING_DATE field with the next oldest date than the one displayed on screen.**Previous Class** - Queries the O_STAFF_TRAININGS table for the TRAINING_DATE field with the next most recent date than the one displayed on screen.*Background Process(es)*

The system displays the most recent training record stored in the system for this staff member when the screen is initially displayed. It displays the record in the O_STAFF_TRAINING.TRAINING_DATE field with the greatest value and navigates through the other records in descending order.

The user can navigate to more recent or older training records for a staff member by clicking the < (previous_item) and > (next_item) VCR buttons respectively.

Operations Management

Section 5 - 1.1.2 Update Organizational Units Information

Section 5 - 1.1.2.1 Organizational Units

Form: os_mtn_org_units

Fields

Organization Code - O_ORGANZATIONAL_UNITS.ORG_CODE

This field is mandatory.

Name - O_ORGANZATIONAL_UNITS.NAME

This field is mandatory.

Organization Level - O_ORGANZATIONAL_UNITS.OU_TYPE

Lov: Static (Clinic, Local Agency, State Agency)

Default value is 'Local Agency'.

Distribution sites will be assigned at the Clinic level.

This field is mandatory.

FNS Identifier - O_ORGANIZATIONAL_UNITS.FNS_CODE

This field is optional.

Elevation - O_ORGANZATIONAL_UNITS.CE_LO_ELEVATION

Lov: c_elevations.

Lov is used for validations.

This field is optional.

Address - O_ORGANZATIONAL_UNITS.ADDRESS1

This field is mandatory.

O_ORGANZATIONAL_UNITS.ADDRESS2

This field is optional.

City - S_GEO_LOCATIONS.SC_DESCRIPTION

Used to populate O_ORGANIZATIONAL_UNITS.SGEO_GEO_LOCATION_ID

Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID

Lov: s_geo_locations. Lov is used for validation.

This field is mandatory.

County - S_COUNTIES.DESCRPTION from S_GEO_LOCATIONS.SC4_COUNTY_CODE

Generated from O_ORGANIZATIONAL_UNITS.SGEO_GEO_LOCATION_ID

Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID

This field is display only.

State - S_GEO_LOCATIONS.SS_STATE_ID

Generated from O_ORGANIZATIONAL_UNITS.SGEO_GEO_LOCATION_ID

Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID

This field is display only.

Zip Code - S_GEO_LOCATIONS.SZ_ZIP5, O_ORGANIZATIONAL_UNITS.ZIP4

Used to populate O_ORGANIZATIONAL_UNITS.SGEO_GEO_LOCATION_ID Code table column S_GEO_LOCATION.GEO_LOCATION_ID

Lov: s_zips. Lov is used for validation.

The ZIP5 field is mandatory, the ZIP4 is optional.

Parent Org. Code - O_ORGANZATIONAL_UNITS.ORG_CODE

Lov: o_organizational_units. Generated from O_ORGANIZATIONAL_UNITS.OU_SEQ_ID
This field is mandatory except for the state agency.

Name - O_ORGANIZATIONAL_UNITS.NAME Calculated from
O_ORGANIZATIONAL_UNITS.SEQ_ID

This field is display only.

WIC Office Space - O_ORGANIZATIONAL_UNITS.OFFICE_SPACE

This field is optional.

Default value is 1.

Measuring Unit - O_ORGANIZATIONAL_UNITS.MEASURING_UNIT

Lov: Static (English(E) or Metric(M)). Default is (E).

This field is optional.

Food Package Prefix - O_ORGANIZATIONAL_UNITS.FP_PREFIX.

This field is generated and stored in the database, see background processes.

This field is display only. *This field is no longer used per Tracker 2943.*

E-Mail - O_ORGANIZATIONAL_UNITS.E_MAIL

This field is optional.

Comment - O_ORGANIZATIONAL_UNITS.NOTE

This field is optional.

Background Process(es)

Upon creation of a new clinic in this screen, the following sequences need to be created through SQL*Plus for the clinic in the S_APPL_SEQUENCES table:

BATCH_RUN_SEQ
C_P_COUNS_NOTE_SEQ
FAMILY_ECONOMIC_UNIT_SEQ
INCOME_HISTORY_SEQ
INCOME_SEQ
INFANT_DATA_ID_SEQ
OUTREACH_ORG_SEQ
STAFF_MEMBER_SEQ
TRANSFER_SEQ
UNVOID_AUDIT_TRAIL_SEQ
UNWAITLIST_AUDIT_TRAIL_SEQ
WL_CONTACT_SEQ

The sequence start and end numbers must be a unique range of numbers for each clinic in the state.

Food Package Prefix Field – *This field is no longer used per Tracker 2943.*

The parameter.prefix_flag's default value is 'N', so when a user enters a form, the initial value equals 'N'. Also, whenever a user tries to tab into the prefix field when there is no value, the system automatically sets the value of the parameter.prefix_flag to 'N'.

When the prefix flag indicates that a Food Package Prefix needs to be generated (parameter.prefix_flag = 'N'), the system generates a one digit alpha numeric code(O_ORGANIZATIONAL_UNITS.FP_PREFIX) for the new agency or clinic. The system loops through the existing Food Package Prefix's that have been used and populates the new item with the next available code by selecting O_ORGANIZATIONAL_UNITS.FP_PREFIX for the particular organization type and sequence id, and then fetching this value into a variable that holds the value(hold_fp_prefix) for

the loop. The system will exit the loop when no more values are found for hold_fp_prefix and sets this value equal to a variable last_val. If last_val has no value then the system starts with the alpha numeric character 'A', otherwise it selects the last_value found and increments it by one. For example, if the last prefix used was 'B' then the system selects 'C' for the new prefix and assigns it to the agency or clinic. This prefix is stored in O_ORGANIZATIONAL_UNITS.FP_PREFIX but the system displays on the screen the agency or clinics O_ORGANIZATIONAL_UNIT.ORG_CODE.

The food package prefix is only generated when a user enters a Local Agency, Local Agency or a WIC Clinic and saves that record to the database.

The system populates the Name field next to the Parent Org. Code field after the user selects a parent organization code from the O_ORGANIZATIONAL_UNITS LOV.

Section 5 - 1.1.2.2 Organizational Units-Contact Info popup

Fields

Staff ID - O_ORGANIZATIONAL_UNITS.SM_STAFF_MEMBER_ID
Code table column O_STAFF_MEMBERS.STAFF_MEMBER_ID
Lov: o_staff_members. Lov is used for validation.
This field is mandatory.

Last Name - O_STAFF_MEMBERS.LAST_NAME Calculated from
O_ORGANIZATIONAL_UNITS.SM_STAFF_MEMBER_ID
This field is display only.

First Name - O_STAFF_MEMBERS.FIRST_NAME Calculated from
O_ORGANIZATIONAL_UNITS.SM_STAFF_MEMBER_ID
This field is display only.

Title - O_STAFF_TITLES.DESCRPTION Calculated from
O_JOB_DESCRIPTIONS.ST_STAFF_TITLE_CODE
This field is display only.

Comment - O_JOB_DESCRIPTIONS.OST_NOTE
Code table column O_STAFF_TITLES.NOTE
Calculated from O_JOB_DESCRIPTIONS.SM_STAFF_MEMBER_ID
Code table column O_STAFF_MEMBERS.STAFF_MEMBER_ID
This field is display only.

Background Process(es)

The system populates the Last Name, First Name, Title and Comment fields with the appropriate Staff Data table information based upon the Staff ID selected by the user. These fields are populated immediately after the Staff ID field is populated.

Allows user to populate STAFF_ID, LAST_NAME, FIRST_NAME, TITLE, and COMMENT fields.

Section 5 - 1.1.2.3 Organizational Units-Contact Info-Phone popup*Fields***Phone Number** - O_STAFF_PHONES.PHONE_NUMBER

This field is display only.

Ext. - O_STAFF_PHONES.PHONE_EXTENSION

This field is display only.

Phone Type - O_STAFF_PHONES.SPT_DESCRIPTION

Generated from O_STAFF_PHONES.SPT_PHONE_TYPE_CODE

Code table column S_PHONE_TYPES.PHONE_TYPE_CODE

This field is display only.

Background Process(es)

The system displays the Phone, Ext. and Phone Type field with values from the Staff Data record based upon the Staff ID selected in the Organizational Units - Contact Info window.

Section 5 - 1.1.2.4 Organizational Units-Phone popup*Fields***Phone Number** - O_ORG_UNIT_PHONES.PHONE_NUMBER

This field is mandatory.

Ext. - O_ORG_UNIT_PHONES.PHONE_EXTENSION

This field is optional.

Phone Type - S_PHONE_TYPES.DESCRPTION

Used to populate O_ORG_UNIT_PHONES.SPT_PHONE_TYPE_CODE

Code table column S_PHONE_TYPES.PHONE_TYPE_CODE

Lov : s_phone_types. Lov is used for validation.

This field is mandatory if the phone number field is filled in.

Background Process(es)

None

Section 5 - 1.1.2.5 Organizational Units-Programs & Outreach Referral Organizations popup*Fields***Code - O_ORG_PROGRAMS.PRG_PROGRAM_ID**

Code table column O_PROGRAMS.PROGRAM_ID

Lov : o_programs. Lov is used for validation.

This field is mandatory

Description - O_PROGRAMS.DESCRPTION Generated from

O_ORG_PROGRAMS.PRG_PROGRAM_ID

Code table column O_PROGRAMS.PROGRAM_ID

This field is display only.

Comment - O_ORG_PROGRAMS.NOTE for O_ORG_PROGRAMS.PRG_PROGRAM_ID

Code table column O_PROGRAMS.PROGRAM_ID

This field is optional.

Code - O_OUTREACH_PROGRAMS.OO_OUTREACH_ORG_ID

Code table column O_OUTREACH_ORGANIZATIONS.OUTREACH_ORG_ID

for the O_ORG_PROGRAMS.PRG_PROGRAM_ID

Lov: o_outreach_organizations. Lov is used for validation.

This field is mandatory.

Outreach Organization - O_OUTREACH_ORGANIZATION.NAME Calculated from

O_OUTREACH_PROGRAMS.OO_OUTREACH_ORG_ID

Code table column O_OUTREACH_ORGANIZATIONS.OUTREACH_ORG_ID

This field is display only.

Background Process(es)

The system populates the Code and Outreach / Referral Organization field with values corresponding to the Code selected under the Program Categories section of this window. The user can also independently select additional Outreach / Referral Organizations by clicking on the list of values button for the Code field under the Outreach / Referral Organization section of the screen.

Allows user to Populate CODE, DESCRIPTION, and COMMENT fields under Program Categories

Allows user to Populate CODE and OUTREACH_REFERRAL_ORGANIZATION fields under Outreach / Referral Organizations.

Section 5 - 1.1.2.6 Organizational Units-Organizational Unit Characteristics*Fields***Appointment Interval** – O_ORGANIZATIONAL_UNITS.INTERVAL

This field is mandatory.

Cross Streets - O_ORGANIZATIONAL_UNITS.CROSS_STREETS

Default value is N/A.

This field is mandatory.

Organization Size - O_ORGANIZATIONAL_UNITS.ORG_SIZE.

Lov: Static (small, medium, and large). Default value is Large.

This field is mandatory.

Database – O_ORGANIZATIONAL_UNITS.DB_LOCATION.

Used to populate O_ORGANIZATIONAL_UNITS.DB_LOCATION and
O_ORGANIZATIONAL_UNITS.DB_LINK

Lov: Static (PHXAIM, TUCAIM, PLTAIM and Not Applicable). No Default value.

This field is mandatory when creating Local Agencies.

Comment - O_ORGANIZATIONAL_UNITS.OPERCHAR_NOTES

This field is optional.

Zip Codes Serviced - O_ORG_UNIT_ZIP.SZ_ZIP5

Code table column S_ZIPS.ZIP5

Lov: s_zips. Lov is used for validation.

This field is mandatory.

*Check Box(es)***Print Appointment Notice** - O_ORGANIZATIONAL_UNITS.PRINT_APPT_NOTICES**Print Appointment Labels** - O_ORGANIZATIONAL_UNITS.PRINT_APPT_LABELS**WIC Clinic** - O_ORGANIZATIONAL_UNITS.WIC_CLINIC_FLAG**CSFP Clinic** - O_ORGANIZATIONAL_UNITS.CSFP_CLINIC_FLAG**CSFP Distribution Site** - O_ORGANIZATIONAL_UNITS.CSFP_DISTRIBUTION_SITE_FLAG**Farmers Market** - O_ORGANIZATIONAL_UNITS.FARMERS_MARKET_FLAG*Background Process(es)*

The system searches upon the values entered in the Zip Codes Serviced field in the Zip Code Lookup functionality on the Appointments-Main window in the Appointment Scheduler module.

Allows user to check boxes PRINT_APPOINTMENT_NOTICES, PRINT_APPOINTMENT_LABELS, WIC_CLINIC, CSFP_CLINIC, and CSFP_DISTRIBUTION_SITE

Allows user to Populate CROSS_STREETS, ORGANIZATION_SIZE, ZIP_CODES_SERVICED, AND COMMENT fields.

Operations Management

Section 5 - 1.1.3 Update Outreach / Referral Organizations

Section 5 - 1.1.3.1 Outreach / Referral Organizations

Form: os_mtn_outreach_org

Fields

Outreach / Referral Org. ID - O_OUTREACH_ORGANIZATIONS.OUTREACH_ORG_ID

5 digit system generated number.

See Background Processes for system generation.

This field is mandatory.

Name - O_OUTREACH_ORGANIZATIONS.NAME

This field is mandatory.

Outreach / Referral Org. Type -

O_OUTREACH_ORGANIZATIONS.OOT_OUTREACH_ORG_TYPE_CODE,

Code table column O_OUTREACH_ORG_TYPES.OUTREACH_ORG_TYPE_CODE

Description is O_OUTREACH_ORG_TYPES.DESCRPTION

Lov : o_outreach_org_types. Lov is used for validation.

This field is mandatory.

Address - O_OUTREACH_ORGANIZATIONS.ADDRESS1,

O_OUTREACH_ORGANIZATIONS.ADDRESS2

The ADDRESS1 field is mandatory, the ADDRESS2 field is optional.

City - O_OUTREACH_ORGANIZATIONS.SC_DESCRIPTION

Used to populate O_OUTREACH_ORGANIZATIONS.SGEO_GEO_LOCATION_ID

Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID

Lov: s_geo_locations. Lov is used for validation.

This field is mandatory.

County - S_COUNTIES.DESCRPTION from S_GEO_LOCATIONS.SC4_COUNTY_CODE

Generated from O_OUTREACH_ORGANIZATIONS.SGEO_GEO_LOCATION_ID

Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID

This field is display only.

State - S_GEO_LOCATIONS.SS_STATE_ID

Generated from O_OUTREACH_ORGANIZATIONS.SGEO_GEO_LOCATION_ID

Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID

This field is display only.

Zip Code - S_GEO_LOCATIONS.SZ_ZIP5, O_OUTREACH_ORGANIZATIONS.ZIP4

Used to populate O_OUTREACH_ORGANIZATIONS.SGEO_GEO_LOCATION_ID

Code table column S_GEO_LOCATIONS.GEO_LOCATION_ID

Lov: s_geo_locations. Lov is used for validation.

The zip5 field is mandatory, the zip4 field is optional.

Last Name - O_OUTREACH_ORGANIZATIONS.CONTACT_LAST_NAME

This field is mandatory.

First Name - O_OUTREACH_ORGANIZATIONS.CONTACT_FIRST_NAME

This field is mandatory.

MI1 - O_OUTREACH_ORGANIZATIONS.CONTACT_MI1

This field is optional.

MI2 - O_OUTREACH_ORGANIZATIONS.CONTACT_MI2

This field is optional.

Title - O_OUTREACH_ORGANIZATIONS.SCP_CONTACT_TITLE_CODE

Code table column S_CONTACT_TITLES.CONTACT_TITLE_CODE

Description is S_CONTACT_TITLES.DESCRPTION

Lov : s_contact_titles. Lov is used for validation.

This field is mandatory.

Comment - O_OUTREACH_ORGANIZATIONS.NOTE

This field is optional.

Check Box(es)

Smoking Referral Org. - O_OUTREACH_ORGANIZATIONS.SMOKING_ORG_FLAG

*Background Process(es)***Outreach Ref / Org ID field**

The Outreach Ref / Org ID field is system generated when the user adds a new Outreach / Referral Organization. The system first selects the O_ORGANIZATIONAL_UNITS.ORG_CODE for the O_ORGANIZATIONAL_UNITS.SEQ_ID of the Local Agency the user entered when logging onto the AIM system.

The system performs a search to determine the next available O_OUTREACH_ORGANIZATIONS.OUTREACH_ORG_ID, which is stored as a numeric value consisting of a prefix containing the user entered Local Agency ORG_CODE, (a two digit value) and a suffix which represents the unique value of the Outreach / Referral organization(a 3 digit value). This value is stored in the OUTREACH_ORG_SEQ field in the S_APPL_SEQUENCES base table based on the Agency that the user is logged in to.

Section 5 - 1.1.3.2 Outreach / Referral Organizations – Local Agencies popup*Fields*

Local Agency – NAME from O_ORGANIZATIONAL_UNITS used to populate

O_OUT_ORG_LAS.OU_SEQ_ID. Code table column

O_ORGANIZATIONAL_UNITS.SEQ_ID

Lov is used for validation. This field is mandatory.

Check Box(es)

Disabled Flag – O_OUT_ORG_LAS.DISABLED_FLAG

Section 5 - 1.1.3.3 Outreach / Referral Organizations-Communications popup*Fields*

- Code** - O_OUTREACH_COMMS.OTC_OUTREACH_COMM_TYPE_CODE
Code table column O_OUTREACH_COMM_TYPES.OUTREACH_COMM_TYPE_CODE
Lov:o_outreach_comm_types. Lov is used for validation.
This field is mandatory.
- Description** - O_OUTREACH_COMM_TYPES.DESCRPTION
This field is display only.
- Date Sent/Called** - O_OUTREACH_COMMS.DATE_SENT_CALLED
This field is mandatory.
- Comment** - O_OUTREACH_COMMS.NOTE
This field is optional.

Background Process(es)

None.

Section 5 - 1.1.3.4 Outreach / Referral Organizations-Program Category popup*Fields*

- ID** - O_OUTREACH_PROGRAMS.PRG_PROGRAM_ID
Lov :o_programs.
This field is mandatory.
- Description** - O_PROGRAMS.DESCRPTION
This field is display only.
- Comment** - O_OUTREACH_PROGRAMS.NOTE
This field is optional.

Background Process(es)

None.

Section 5 - 1.1.3.5 Referral Organizations-Phone popup*Fields*

- Phone** - O_OUTREACH_ORG_PHONES.PHONE_NUMBER
This field is optional.
- Ext.** - O_OUTREACH_ORG_PHONES.PHONE_EXTENSION
This field is optional.
- Phone Type** - O_OUTREACH_ORG_PHONES.SPT_DESCRIPTION

Used to populate O_OUTREACH_ORG_PHONES.SPT_PHONE_TYPE_CODE
Code table column S_PHONE_TYPES.PHONE_TYPE_CODE
Lov: s_phone_types. Lov is used for validation.
This field is mandatory if a phone number has been filled in the phone field.

Background Process(es)

None.

Section 5 - 1.1.4 Update Programs**Section 5 - 1.1.4.1** Program Categories

Form: os_mtn_program

*Field***Code - O_PROGRAMS.PROGRAM_ID**

This field is mandatory.

Description -O_PROGRAMS.DESCRPTION

This field is mandatory

Adj Effective Date - O_PROGRAMS.ADJ_EFFECTIVE_DATE

This field is optional.

End Date - O_PROGRAMS.ADJ_END_DATE

This field is optional.

Comment - O_PROGRAMS.NOTE

This field is optional.

Code - O_PROGRAM_FUNDS.FFS_FUND_SOURCE_CODE

Code table column F_FUND_SOURCES.FUND_SOURCE_CODE

Lov: f_fund_sources. Lov is used for validation.

This field is optional.

Description -F_FUND_SOURCES.DESCRPTION

This field is display only.

*Check Box(es)***Adj. Eligible - O_PROGRAMS.ADJ_ELIGIBLE_FLAG****Family Eligible - O_PROGRAMS.FAMILY_ELIGIBLE_FLAG****Print on Care Plan - O_PROGRAMS.PRINT_ON_CARE_FLAG***Background Process(es)*

None.

Operations Management

Section 5 - 1.1.5 Update Time Study - Daily Log

Section 5 - 1.1.5.1 Time Study - Daily Log

Form: os_time_study_daily_log

Fields

Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE

This field is display only.

Staff ID - O_STAFF_TIME_STUDIES.SM_STAFF_MEMBER_ID

Code table column O_STAFF_MEMBERS.STAFF_MEMBER_ID

Lov: o_staff_members. Lov is used for validation.

This field is mandatory for users with the S_WIC_USERS.STUDY_SUPERVISOR field = 'Y', otherwise it is display only.

Date - O_STAFF_TIME_STUDIES.TIME_STUDY_DATE

This field is mandatory.

Participant Services - O_STAFF_TIME_STUDIES.PART_SERVICES for the

O_STAFF_TIME_STUDIES.TIME_STUDY_DATE and

O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN.

This field is optional.

Nutrition Education - O_STAFF_TIME_STUDIES.NUTR_ED for the

O_STAFF_TIME_STUDIES.TIME_STUDY_DATE and

O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN.

This field is optional.

Breastfeeding - O_STAFF_TIME_STUDIES.BREASTFEEDING

for the O_STAFF_TIME_STUDIES.TIME_STUDY_DATE and

O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN.

This field is optional.

Admin - O_STAFF_TIME_STUDIES.ADMIN for the

O_STAFF_TIME_STUDIES.TIME_STUDY_DATE and

O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN.

This field is optional.

Farmers Market - O_STAFF_TIME_STUDIES.FARMERS_MKT

for the O_STAFF_TIME_STUDIES.TIME_STUDY_DATE and

O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN.

This field is optional.

Daily Totals (min) - Totals the sum of each individual column.

SUM(O_STAFF_TIME_STUDIES.PART_SERVICES)

SUM(O_STAFF_TIME_STUDIES.NUTR.ED)

SUM(O_STAFF_TIME_STUDIES.BREASTFEEDING)

SUM(O_STAFF_TIME_STUDIES.ADMIN)

SUM(O_STAFF_TIME_STUDIES.FARMERS_MKT)

This field is calculated by the system. For each of these database fields, the system calculates a sum of the total minutes spent on that activity during the day.

Hours (For each column) - Calculated from (Daily Totals (min) / 60) rounded to the nearest hour.

This field is calculated by the system. For each field in the database, the system calculates the number of hours spent on that activity during the day by translating the minutes to hours.

Push Buttons

Create Log - Allows user with Time Study Supervisor capability to create and view log information for other staff members in their agency.

Background Process(es)

Rows

The first half of the time slot range is stored in O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN for each individual record. For example, the first time slot shown on the screen is from 6:00 A.M. to 7:00 A.M. so 6:00 A.M. will be the value stored in O_STAFF_TIME_STUDIES.TIME_SLOT_BEGIN. Upon the user opening the Time Study - Daily Log Form, a When-New-Form-Instance trigger prompts the system to verify if the S_WIC_USERS.STUDY_SUPERVISOR field value for the userid entered on the Arizona - Log on Screen is 'Y' or 'N'. If the value is 'Y' the Staff ID field is mandatory, otherwise it is display only.

Operations Management

Section 5 - 1.1.6 Update Annual WIC Cost Summary

Section 5 - 1.1.6.1 Annual WIC Cost Summary

Form: os_annual_wic_cost_summary

Fields

Local Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE for the
O_ANNUAL_WIC_COST_SUMMARIES.OU_SEQ_ID
Code table column O_ORGANIZATIONAL_UNITS.ORG_CODE
Description is O_ORGANIZATIONAL_UNITS.NAME for the
O_ANNUAL_WIC_COST_SUMMARIES.OU_SEQ_ID
Lov: o_organizational_units. Lov is used for validation.
This field is mandatory.

Fiscal Year - O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR
This field is mandatory.

Personnel & ERE - O_ANNUAL_WIC_COST_SUMMARIES.PERSONNEL_ERE
This field is optional.
See calculation in background processes below.

Professional & Outside Services -
O_ANNUAL_WIC_COST_SUMMARIES.PROF_OUTSIDE_SERVICES
This field is optional.

Travel Costs - O_ANNUAL_WIC_COST_SUMMARIES.TRAVEL_COSTS
This field is optional.

Occupancy Costs - O_ANNUAL_WIC_COST_SUMMARIES.OCCUPANCY_COSTS
This field is optional.

Other Operating Costs - O_ANNUAL_WIC_COST_SUMMARIES.OTHER_OPERATING_COSTS
This field is optional.

Capital Costs - O_ANNUAL_WIC_COST_SUMMARIES.CAPITAL_COSTS
This field is optional.

Indirect Costs - O_ANNUAL_WIC_COST_SUMMARIES.INDIRECT_COSTS
This field is optional.

Total - Totals the sum of each row and column. For each column:
SUM(O_ANNUAL_WIC_COST_SUMMARIES.PERSONNEL_ERE)
SUM(O_ANNUAL_WIC_COST_SUMMARIES.PROF_OUTSIDE_SERVICES)
SUM(O_ANNUAL_WIC_COST_SUMMARIES.TRAVEL_COSTS)
SUM(O_ANNUAL_WIC_COST_SUMMARIES.OCCUPANCY_COSTS)
SUM(O_ANNUAL_WIC_COST_SUMMARIES.OTHER_OPERATING_COSTS)
SUM(O_ANNUAL_WIC_COST_SUMMARIES.CAPITAL_COSTS)
SUM(O_ANNUAL_WIC_COST_SUMMARIES.INDIRECT_COSTS) for each
O_STAFF_TIME_STUDIES activity.

For each row: SUM(O_STAFF_TIME_STUDIES.PART_SERVICES)
SUM(O_STAFF_TIME_STUDIES.NUTR.ED)

SUM(O_STAFF_TIME_STUDIES.BREASTFEEDING)
 SUM(O_STAFF_TIME_STUDIES.ADMIN)
 SUM(O_STAFF_TIME_STUDIES.FARMERS_MKT) for the particular
 O_ANNUAL_WIC_COST_SUMMARIES activity.

The system totals the number of dollars spent on each of the activity categories in that local agency for the the fiscal year shown.

Push Buttons

Create Log - Allows user with Time Study Supervisor capability to create and view log information for other staff members in their agency.

Background Process(es)

Personnel and ERE

When the user selects a Local Agency and Fiscal Year, the system will then populate the Personnel & ERE row with values from the hours spent for the particular activity type(calculated from Daily Totals(min) divided by 60 rounded to the nearest hour) multiplied by O_JOB_DESCRIPTIONS.HOURLY_SALARY multiplied by O_JOB_DESCRIPTIONS.FTE_BASE.

Next, the ERE cost for the particular O_STAFF_TIME_STUDIES activity is calculated by multiplying the result of the calculation above by O_JOB_DESCRIPTIONS.ERE_PERCENT.

The system then adds these two results together for each O_STAFF_MEMBERS.STAFF_MEMBER_ID with the same O_ORGANIZATIONAL_UNITS.ORG_CODE. The system then populates O_ANNUAL_WIC_COST_SUMMARIES.PERSONNEL_ERE by totaling the previous calculation for all staff members in a local agency for the particular O_STAFF_TIME_STUDIES activity.

The system will provide a running total in the Total row at the bottom of the screen which will change as additional cost values are added to the rows above it where:

```
O_ORGANIZATIONAL_UNITS.OU_TYPE = 'CLINIC'
AND O_ORGANIZATIONAL_UNITS.SEQ_ID
  = NVL(:SGL_CLINIC,O_ORGANIZATIONAL_UNITS.SEQ_ID)
AND O_ORGANIZATIONAL_UNITS.SEQ_ID = O_ORGANIZATIONAL_UNITS.OU_SEQ_ID
ORDER BY O_ORGANIZATIONAL_UNITS.ORG_CODE,
         O_ORGANIZATIONAL_UNITS.ORG_CODE
```

The running total is shown in the “Total” row and column in the fields listing.

The O_ANNUAL_WIC_COST_SUMMARY.ACTIVITY column in the database will be populated with the activities corresponding to columns in O_STAFF_TIME_STUDY (Client Services, Nutrition Education, Breastfeeding, Admin, Farmers Market).

Operations Management

Section 5 - 2 Tables

Section 5 - 2.1 Update Table Information

Section 5 - 2.1.1 Update Outreach / Referral Organization Types

Section 5 - 2.1.1.1 Maintain Outreach / Referral Organization Types

Form: os_mtn_out_org_type

Report: or_mtn_out_org_type

Fields

Code - O_OUTREACH_ORG_TYPES.OUTREACH_ORG_TYPE_CODE

This field is mandatory.

Description - O_OUTREACH_ORG_TYPES.DESCRPTION

This field is mandatory

Comment - O_OUTREACH_ORG_TYPES.NOTE

This field is optional.

Background Process(es)

None.

Operations Management

Section 5 - 2.1.2 Update Outreach / Referral Communication Types

Section 5 - 2.1.2.1 Maintain Outreach / Referral Communication Types

Form: os_mtn_outcomm_type

Report: or_mtn_outcomm_type

Fields

Code - O_OUTREACH_COMM_TYPES.OUTREACH_COMM_TYPE_CODE

This field is mandatory.

Description - O_OUTREACH_COMM_TYPES.DESRIPTION

This field is mandatory.

Comment - O_OUTREACH_COMM_TYPES.NOTE

This field is optional.

Background Process(es)

None.

Operations Management

Section 5 - 2.1.3 Update Staff Titles

Section 5 - 2.1.3.1 Maintain Staff Titles

Forms: os_mtn_staff_title

Report: or_mtn_staff_title

Fields

Code - O_STAFF_TITLES.STAFF_TITLE_CODE

This field is mandatory.

Description - O_STAFF_TITLES.DESCRPTION

This field is mandatory.

Title Category - O_STAFF_TITLES.TC_TITLE_CATEGORY_CODE

Code table column O_TITLE_CATEGORIES.TITLE_CATEGORY_CODE

Description is O_TITLE_CATEGORIES.DESCRPTION

Lov: o_title_categories. Lov is used for validation.

This field is mandatory.

Comment - O_STAFF_TITLES.NOTE

This field is optional.

Background Process(es)

The system populates the category field with the description corresponding to the Title selected where:

```
O_TITLE_CATEGORIES.TITLE_CATEGORY_CODE =  
O_STAFF_TITLES.TC_TITLE_CATEGORY_CODE
```

```
ORDER BY O_STAFF_TITLES.STAFF_TITLE_CODE
```

Operations Management

Section 5 - 2.1.4 Update Title Categories

Section 5 - 2.1.4.1 Maintain Title Categories

Form: os_mtn_title_cat

Report: or_mtn_title_cat

Fields

Code - O_TITLE_CATEGORIES.TITLE_CATEGORY_CODE

This field is mandatory.

Description - O_TITLE_CATEGORIES.DESCRPTION

This field is mandatory.

Comment - O_TITLE_CATEGORIES.NOTE

This field is optional.

Background Process(es)

None.

Operations Management

Section 5 - 3 Outputs

Section 5 - 3.1 Labels

Section 5 - 3.1.1 Creating Outreach / Referral Organization Mailing Labels

Section 5 - 3.1.1.1 Outreach / Referral Organization Labels Parameter

Form: os_org_label

Report: or_ou_labels_5160, or_ou_labels_5163

Fields

Label – Label type: “5160: Avery HP Label Stock (3x10) (1" x 2 5/8)" or “5163: Avery HP Label Stock (2x5) (2" x 4)"”
Default = None.

Select By - Enables the user to select the search criterion the report will query by:
Local Agency, Outreach Organization, or Outreach Type.
Default = None.

Local Agency – Displays O_ORGANIZATIONAL_UNITS.NAME
Lov: O_ORGANIZATIONAL_UNITS.NAME. Lov is used for validation.
Default = None.

Outreach Organization – Displays O_OUTREACH_ORGANIZATIONS.NAME.
Lov: o_outreach_organizations. Lov is used for validation.
Default = None.

Outreach Type - Displays O_OUTREACH_ORG_TYPES.DESCRPTION
Lov: o_outreach_org_types. Lov is used for validation.

Section 5 - 3.1.1.2 Outreach / Referral Organization Labels Report*Fields*

Outreach Organization Name - O_OUTREACH_ORGANIZATIONS.NAME
Outreach Organization Address 1 - O_OUTREACH_ORGANIZATIONS.ADDRESS1
Outreach Organization Address 2 - O_OUTREACH_ORGANIZATIONS.ADDRESS2
City - S_GEO_LOCATIONS.SC_DESCRIPTION
State - S_GEO_LOCATIONS.SS_STATE_ID
Zip - S_GEO_LOCATIONS.SZ_ZIP5
Zip4 - O_OUTREACH_ORGANIZATIONS.ZIP4
Contact Last Name - O_OUTREACH_ORGANIZATIONS.CONTACT_LAST_NAME
Contact First Name - O_OUTREACH_ORGANIZATIONS.CONTACT_FIRST_NAME

Sort Criteria (Major to Minor):

Outreach / Referral Organization Name (Ascending Order)

Background Process(es)

User selects Local Agency:

```

select ooo.outreach_org_id, ooo.name, ooo.address1, ooo.address2,
       ooo.sgeo_geo_location_id, ooo.zip4,
       ooo.contact_first_name || ' ' || ooo.contact_last_name
from o_outreach_organizations ooo, o_out_org_las oool
where ooo.outreach_org_id = oool.oo_outreach_org_id
and oool.ou_seq_id = :srch.org_id;
  
```

User selects Outreach Org:

```

select outreach_org_id, name, address1, address2, sgeo_geo_location_id, zip4,
       contact_first_name || ' ' || contact_last_name
from o_outreach_organizations
where outreach_org_id = :srch.outreach_id;
  
```

User selects Outreach Type:

```

select outreach_org_id, name, address1, address2, sgeo_geo_location_id, zip4,
       contact_first_name || ' ' || contact_last_name
from o_outreach_organizations
where oot_outreach_org_type_code = :srch.out_type;
  
```

Operations Management

Section 5 - 3.1.2 Creating Agency Mailing Labels

Section 5 - 3.1.2.1 Agency Labels Parameter

Form: `os_ou_label`

Reports: `or_ou_labels_5160`, `or_ou_labels_5163`

Fields

Label – Label type: “5160: Avery HP Label Stock (3x10) (1" x 2 5/8)" or “5163: Avery HP Label Stock (2x5) (2" x 4)"”
Default = None.

Local Agency – Displays O_ORGANIZATIONAL_UNITS.NAME
Lov: O_ORGANIZATIONAL_UNITS.NAME. Lov is used for validation.
Default = None.

Section 5 - 1.1.1.1 Agency Labels Report

Fields

Name - O_ORGANIZATIONAL_UNITS.NAME
Address1 - O_ORGANIZATIONAL_UNITS.ADDRESS1
Address2 - O_ORGANIZATIONAL_UNITS.ADDRESS2
City - S_GEO_LOCATIONS.SC_DESCRIPTION
State - S_GEO_LOCATIONS.SS_STATE_ID
Zip5 - S_GEO_LOCATIONS.SZ_ZIP5
Zip4 - O_ORGANIZATIONAL_UNITS.ZIP4
First Name - O_STAFF_MEMBERS.FIRST_NAME
Last Name - O_STAFF_MEMBERS.LAST_NAME

Sort Criteria (Major to Minor):

Organizational Unit (Ascending)

Background Process(es)

The system allows the user to select the Organizational Unit based upon the Local Agency the user logged into when entering the AIM application. Users entering the State Agency as their Agency code will have access to all agencies in the AIM application.

S_GEO_LOCATIONS.GEO_LOCATION_ID =
O_ORGANIZATIONAL_UNITS.SGEO_GEO_LOCATION_ID

AND O_STAFF_MEMBERS.STAFF_MEMBER_ID =
O_ORGANIZATIONAL_UNITS.SM_STAFF_MEMBER_ID

AND O_ORGANIZATIONAL_UNITS.OU_TYPE = 'LOCALAGY'

The system displays the zip code information where:

S_GEO_LOCATIONS.GEO_LOCATION_ID =
O_ORGANIZATIONAL_UNITS.SGEO_GEO_LOCATION_ID
AND S_STAFF_MEMBERS.STAFF_MEMBER_ID =
O_ORGANIZATIONAL_UNITS.SM_STAFF_MEMBER_ID
AND O_ORGANIZATIONAL_UNITS.OU_TYPE = 'LOCALAGY'

Operations Management

Section 5 - 3.2 Reports

Section 5 - 3.2.1 Producing a Local Agency Directory

Section 5 - 3.2.1.1 Local Agency Directory Parameter

Report: or_lclagcy_directory

Fields

Internal / External - Allows the user to select whether the generated report will be used for Internal (WIC, CSFP) distribution or External distribution. The user is able to select: Internal or External from a preprogrammed domain of values.

Section 5 - 3.2.1.2 Local Agency Directory Internal & External Reports

Fields

Local Agency and Coordinator Section (Internal & External Reports)

Local Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE

Local Agency Name - O_ORGANIZATIONAL_UNITS.NAME

Coordinator Last Name - O_STAFF_MEMBERS.LAST_NAME for the
O_STAFF_MEMBERS.LA_WIC_COORD_FLAG = 'Y'

Coordinator First Name - O_STAFF_MEMBERS.FIRST_NAME for the
O_STAFF_MEMBERS.LA_WIC_COORD_FLAG = 'Y'

Address 1 - O_ORGANIZATIONAL_UNITS.ADDRESS1

Address 2 - O_ORGANIZATIONAL_UNITS.ADDRESS2

City - S_GEO_LOCATIONS.SC_DESCRIPTION

State - S_GEO_LOCATIONS.SS_STATE_ID

Zip5 - S_GEO_LOCATIONS.SZ_ZIP5

Zip4 - O_ORGANIZATIONAL_UNITS.ZIP4

Phone - O_ORG_UNIT_PHONES.PHONE_NUMBER

Fax - O_ORG_UNIT_PHONES.PHONE_NUMBER

This system differentiates between phone and fax numbers by the
S_PHONE_TYPES.PHONE_TYPE_CODE which is a field in the O_STAFF_PHONES,
O_OUTREACH_ORG_PHONES and O_ORG_UNIT_PHONES tables.

Email - O_ORGANIZATIONAL_UNITS.E_MAIL

Days & Hours of Operation - A_OPERATION_HOURS.DAY_OF_WEEK

A_OPERATION_HOURS.HOURS_OPEN

A_OPERATION_HOURS.HOURS_CLOSE

*Clinics Section***Code** - O_ORGANIZATIONAL_UNITS.ORG_CODE**Clinic** - O_ORGANIZATIONAL_UNITS.NAME**Contact Last Name** - O_STAFF_MEMBERS.LAST_NAME**Contact First Name** - O_STAFF_MEMBERS.FIRST_NAME**Address 1** - O_ORGANIZATIONAL_UNITS.ADDRESS1**Address 2** - O_ORGANIZATIONAL_UNITS.ADDRESS2**City** -S_GEO_LOCATIONS.SC_DESCRIPTION**State** - S_GEO_LOCATIONS.SS_STATE_ID**Zip5** - S_GEO_LOCATIONS.SZ_ZIP5**Zip4** - O_ORGANIZATIONAL_UNITS.ZIP4**Phone** - (Internal Only)O_ORG_UNIT_PHONES.PHONE_NUMBER**Fax** - (Internal Only)O_ORG_UNIT_PHONES.PHONE_NUMBER

This system differentiates between phone and fax numbers by the S_PHONE_TYPES.PHONE_TYPE_CODE which is a field in the O_STAFF_PHONES, O_OUTREACH_ORG_PHONES and O_ORG_UNIT_PHONES tables.

Email - (Internal Only)O_ORGANIZATIONAL_UNITS.EMAIL**Days & Hours of Operation** - A_OPERATION_HOURS.DAY_OF_WEEK

A_OPERATION_HOURS.HOURS_OPEN

A_OPERATION_HOURS.HOURS_CLOSE

Contact Name - (Internal Only)

O_STAFF_MEMBERS.LAST_NAME

O_STAFF_MEMBERS.FIRST_NAME

Sort Criteria (Major to Minor):

Organizational Unit Code (Ascending)

Background Process(es)

None.

Operations Management

Section 5 - 3.2.2 Producing a Local Agency Staff Listing

Section 5 - 3.2.2.1 Local Agency Staff Listing Parameter

Report: or_la_staff_listing

Fields

Program Category - Queries against O_PROGRAMS.DESCRPTION

 Lov: o_programs. Lov is used for validation.

 Default = "All"

Sort Sequence - Allows the user to select how the report will be sorted.

 Lov: Static (staff title, category, and name)

Section 5 - 3.2.2.2 Local Agency Staff Listing Report

Fields

Program - O_PROGRAMS.PROGRAM_ID

 O_PROGRAMS.DESCRPTION

LA ID - O_ORGANIZATIONAL_UNITS.ORG_CODE

LA Name - O_ORGANIZATIONAL_UNITS.NAME

Name (Last and First) - O_STAFF_MEMBERS.LAST_NAME||'

 ' ||O_STAFF_MEMBERS.FIRST_NAME||' ||O_STAFF_MEMBERS.MI1

Title Category - O_TITLE_CATEGORIES.DESCRPTION

Title - O_STAFF_TITLES.DESCRPTION

Program Funding - F_FUND_SOURCES.DESCRPTION

FT/PT COOP - DECODE(SIGN(O_JOB_DESCRIPTIONS.WEEKLY_HOURS -

 O_JOB_DESCRIPTIONS.FTE_BASE),-1,'PT','FT') FT_OR_PT

Hrs/Week - O_JOB_DESCRIPTIONS.WEEKLY_HOURS

FTE's - Calculated from O_JOB_DESCRIPTIONS.WEEKLY_HOURS divided by

 O_JOB_DESCRIPTIONS.FTE_BASE

Address - O_ORGANIZATIONAL_UNITS.ADDRESS1

 O_ORGANIZATIONAL_UNITS.ADDRESS2

 S_GEO_LOCATIONS.SC_DESCRIPTION

 S_GEO_LOCATIONS.SS_STATE_ID

 S_GEO_LOCATIONS.SZ_ZIP5

 O_ORGANIZATIONAL_UNITS.ZIP4

Phone - O_ORG_UNIT_PHONES.PHONE_NUMBER

Fax - O_ORG_UNIT_PHONES.PHONE_NUMBER

 This system differentiates between phone and fax numbers by the

 S_PHONE_TYPES.PHONE_TYPE_CODE which is a field in the O_STAFF_PHONES,

O_OUTREACH_ORG_PHONES and O_ORG_UNIT_PHONES tables.
Local Agency Coordinator - O_STAFF_MEMBERS.FIRST_NAME
O_STAFF_MEMBERS.LAST_NAME for the
O_STAFF_MEMBERS.LA_WIC_COORD_FLAG = 'Y'
Total FTE's - SUM(O_JOB_DESCRIPTIONS.WEEKLY_HOURS divided by
O_JOB_DESCRIPTIONS.FTE_BASE) for each agency.

Sort Criteria (Major to Minor):

Program Category Code (Ascending), then depending upon user selection for the sort:

Three Sort Criteria (Major to Minor):

Staff Title: Organizational Unit Name, Staff Title Description, Staff Member Last Name, Staff Member First Name

Title Category: Organizational Unit Name, Title Category Description, Staff Member Last Name, Staff Member First Name

Staff Name: Organizational Unit Name, Staff Member Last Name, Staff Member First Name

Background Process(es)

None.

Operations Management

Section 5 - 3.2.3 Producing an Outreach / Referral Organization Listing

Section 5 - 3.2.3.1 Outreach / Referral Organization Listing Parameter

Report: or_outorg_listing

Fields

None.

Section 5 - 3.2.3.2 Outreach / Referral Organization Listing Report

Fields

Local / State Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE

Local / State Agency Name - O_ORGANIZATIONAL_UNITS.NAME

Outreach ID - O_OUTREACH_ORGANIZATIONS.OUTREACH_ORG_ID

Name - O_OUTREACH_ORGANIZATIONS.NAME

Address1 - O_OUTREACH_ORGANIZATIONS.ADDRESS1

Address2 - O_OUTREACH_ORGANIZATIONS.ADDRESS2

City - S_GEO_LOCATIONS.SC_DESCRIPTION

State - S_GEO_LOCATIONS.SS_STATE_ID

Zip5 - S_GEO_LOCATIONS.SZ_ZIP5

Zip4 - O_OUTREACH_ORGANIZATIONS.ZIP4

Contact Last Name - O_OUTREACH_ORGANIZATIONS.CONTACT_LAST_NAME

Contact First Name - O_OUTREACH_ORGANIZATIONS.CONTACT_FIRST_NAME

Description - S_CONTACT_TITLES.DESCRPTION

Phone - O_OUTREACH_ORG_PHONES.PHONE_NUMBER

O_OUTREACH_ORG_PHONES.PHONE_EXTENSION

Fax - O_OUTREACH_ORG_PHONES.PHONE_NUMBER

O_OUTREACH_ORG_PHONES.PHONE_EXTENSION

This system differentiates between phone and fax numbers by the

S_PHONE_TYPES.PHONE_TYPE_CODE which is a field in the O_STAFF_PHONES,

O_OUTREACH_ORG_PHONES and O_ORG_UNIT_PHONES tables.

Organization Type - O_OUTREACH_ORG_TYPES.DESCRPTION

Program ID - O_PROGRAMS.PROGRAM_ID

Name - O_PROGRAMS.DESCRPTION

Communication ID - O_OUTREACH_COMM_TYPES.OUTREACH_COMM_TYPE_CODE

Name - O_OUTREACH_COMM_TYPES.DESCRPTION

Date Sent/Called - O_OUTREACH_COMMS.DATE_SENT_CALLED,

Sort Criteria (Major to Minor):

Outreach / Referral Organization ID (Ascending)

Program Code (Ascending)

Outreach / Referral Communications Date Sent/Called (Ascending)

Background Process(es)

None.

Operations Management

Section 5 - 3.2.4 Producing Nutrition Education Contacts Report

Section 5 - 3.2.4.1 Nutrition Education Contacts Parameter

Report: or_nutr_ed_contacts

Fields

Reporting Level - Allows the user to select the detail level of the report:

Lov: Static (Summary Only, or Summary and Detail).

From Date - Queries against C_CLIENT_SERVICES.SERVICE_DATE

Format: MM/DD/YYYY

This field is mandatory.

Thru Date - Queries against C_CLIENT_SERVICES.SERVICE_DATE

Format: MM/DD/YYYY

This field is mandatory.

Section 5 - 3.2.4.2 Nutrition Education Contacts Summary / Summary & Detail Report

Fields

Local Agency / State Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE

O_ORGANIZATIONAL_UNITS.NAME

Service - A_SERVICES.DESCRPTION

Nutrition Education Topic - C_NUTR_ED_TOPICS.DESCRPTION

Attendees - SUM(C_CLIENT_SERVICES.ATS_ATTEND_STATUS_CODE = 'K') for each Nutrition Education Topic within the service.

Missed - SUM(C_CLIENT_SERVICES.ATS_ATTEND_STATUS_CODE = 'M') for each Nutrition Education Topic within the service.

Pending - SUM(C_CLIENT_SERVICES.ATS_ATTEND_STATUS_CODE = 'P') for each Nutrition Education Topic within the service.

Total for Service - SUM (Attendees, Missed, Pending) for the service.

Attendees(total for service) - SUM (Attendees) for the service.

Missed(total for service) - SUM (Missed) for the service.

Pending(total for service) - SUM (Pending) for the service.

Attendees(local agency totals) - SUM (Attendees(total for service)) for the Local Agency.

Missed(local agency totals) - SUM (Missed(total for service)) for the Local Agency.

Pending(local agency totals) - SUM (Pending(total for service)) for the Local Agency.

Attendees(state agency totals) - SUM (Attendees(total for service)) for the State Agency.

Missed(state agency totals) - SUM (Missed(total for service)) for the State Agency.

Pending(state agency totals) - SUM (Pending(total for service)) for the State Agency.

Sort Criteria (Major to Minor):

Organizational Unit ID (Ascending)

Service ID (Ascending)

Nutrition Education Topic Description (Ascending)

Background Process(es)

The system displays the State Totals Report first when the Summary and Detail reporting level is selected where:

seq_id = :agency

ORDER BY org_code

Operations Management

Section 5 - 3.2.5 Producing a Nutrition Education Monitoring Report

Section 5 - 3.2.5.1 Nutrition Education Monitoring Parameter

Report: or_nutr_ed_monitor

Fields

Local Agency - Queries against O_ORGANIZATIONAL_UNITS.NAME for the Local Agencies.

 Lov: o_organizational_units. Lov is used for validation.

 Defaults to "All Agencies"

Clinic - Queries against O_ORGANIZATIONS_UNITS.NAME for the clinics.

 Lov: o_organizational_units. Lov is used for validation.

 Defaults to "All Clinics"

Dates From - Queries against C_CLIENTS.CLIENT_ID with
C_CERTIFICATIONS.CERT_END_DATE.

 Format: MM/DD/YYYY

 This field is mandatory.

 See Background Processes.

Thru - Queries against C_CLIENTS.CLIENT_ID with
C_CERTIFICATIONS.CERT_END_DATE.

 Format: MM/DD/YYYY

 This field is mandatory.

 See Background Processes.

Section 5 - 3.2.5.2 Nutrition Education Monitoring Report

Fields

Dates From - Displays the user entered start date.

Thru - Displays the user entered end date.

Local Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE,

Local Agency Name - O_ORGANIZATIONAL_UNITS.NAME

Clinic - O_ORGANIZATIONAL_UNITS.ORG_CODE
O_ORGANIZATIONAL_UNITS.NAME

Participant ID - C_CLIENTS.CLIENT_ID for participants whose
C_CERTIFICATIONS.END_DATE is within the date range entered by the user,
C_CLIENTS.REC_STATUS equals 'I', and for each CLIENT_ID the
I_FOOD_INSTRUMENTS.FIRST_DATE_TO_USE must contain a record for
each of the six months during the CLIENT_ID certification period.

Name - C_CLIENTS.LAST_NAME
C_CLIENTS.FIRST_NAME

of Nutrition Ed. Contacts - COUNT (A_APPOINTMENTS.SEQ_ID) for the participant whose
C_CERTIFICATIONS.CERT_END_DATE is within the user entered date range,

C_CLIENTS.REC_STATUS equals 'I' for each CLIENT_ID, the I_FOOD_INSTRUMENTS.FIRST_DATE_TO_USE must contain a record for each of the six months during the CLIENT_ID certification period, the A_SERVICES.NUTR_ED_FLAG must equal 'Y' for the C_CLIENT_SERVICES.SRV_SERVICE_CODE, and the A_APPOINTMENTS.AAS_ATTEND_STATUS_CODE is equal to 'K' (kept) for the C_CLIENT_SERVICES.SRV_SERVICE_CODE

Sort Criteria (Major to Minor):

Organizational Unit ID (Ascending)
of Nutrition Ed. Contacts (Descending)
Participant Last Name (Ascending)
Participant First Name (Ascending)

*Background Process(es)***Dates From and Thru**

Queries against the C_CLIENTS.CLIENT_ID's C_CERTIFICATION.CERT_END_DATE between the user entered Dates From and Thru fields where the C_CLIENTS.REC_STATUS is equal to 'I' (inactive) for the C_CLIENTS.CLIENT_ID, and for each CLIENT_ID, the I_FOOD_INSTRUMENTS.FIRST_DATE_TO_USE must contain a record for each of the six months during the CLIENT_ID certification period.

Operations Management

Section 5 - 3.2.6 Producing a FNS 648 Local Agency Directory

Section 5 - 3.2.6.1 FNS 648 Local Agency Directory Parameter

Report: or_la_directory

Fields

Type of Report - Allows the user to select the type of report to be sent to the FNS.

 Lov: Static (Addition, Update, and Deletion).

Effective Date - The date that the addition, update or deletion of the Local Agency Directory Information is to become effective. This field is user entered.

Organization ID/Level - Queries against O_ORGANIZATIONAL_UNITS.NAME
O_ORGANIZATIONAL_UNITS.OU_TYPE
Lov: o_organizational_units. Lov is used for validation..

Section 5 - 3.2.6.2 FNS 648 Local Agency Directory Report

Fields

Type of Report - Calculated from the type of report selected by the user in the parameter field.

Effective Date - Calculated from the month and year of the Effective Date selected by the user in the parameter field.

State - F_CONTROLS.STATE_DESC

10-DigitCode - F_CONTROLS.STATE_ID_NUMBER

Local Agency Name - O_ORGANIZATIONAL_UNITS.NAME

Address - O_ORGANIZATIONAL_UNITS.ADDRESS1

City - S_CITIES.DESCRPTION

State - S_GEO_LOCATION.SS_STATE_ID

Zip Code - S_GEO_LOCATIONS.SZ_ZIPS

Telephone No. - O_ORG_UNIT_PHONES.PHONE_NUMBER

Sort Criteria (Major to Minor):

Not Applicable

Background Process(es)

None.

Operations Management

Section 5 - 3.2.7 Producing a To/From WIC Referrals Report

Section 5 - 3.2.7.1 To / From WIC Referrals Parameter

Report: or_to_from_wic_ref

Fields

Reporting Level - Queries against O_ORGANIZATIONAL_UNITS.NAME.

 Lov: o_organizational_units.

 Lov is used for validation.

 Default = "All Agencies"

Referral Month From - Queries against C_CLIENT_REFERRALS.REFERRAL_DATE

 This field is mandatory.

Thru -Queries against C_CLIENT_REFERRALS.REFERRAL_DATE

 This field is mandatory.

Section 5 - 3.2.7.2 To / From WIC Referrals Report

Fields

Time Period - Calculated from the Referral Month From and Thru fields on the parameter screen.

Local Agency - O_ORGANIZATIONAL_UNITS.NAME

Outreach / Ref. Org. Type -

 O_OUTREACH_ORGANIZATIONS.OOT_OUTREACH_ORG_TYPE_CODE

Outreach / Ref. Org. Name - O_OUTREACH_ORGANIZATIONS.NAME

Referrals From - COUNT(C_FAM_REFERRALS.CFEU_FAMILY_ID) for the specified date range.

% of Total - Referrals From divided by total # of referrals (Referrals From plus Referrals To) multiplied by 100.

Referrals To - COUNT(C_CLIENT_REFERRALS.CC_CLIENT_ID)for the specified date range.

% of Total - Referrals To divided by total # of referrals (Referrals From plus Referrals To) multiplied by 100.

Total - Records the total sum for the Referrals From, % of Total, Referrals To and % of Total columns.

Sort Criteria (Major to Minor):

Organizational Unit (Ascending)

Outreach / Referral Organization Type (Ascending)

Outreach / Referral Organization ID (Ascending)

Background Process(es)

None.

Operations Management

Section 5 - 3.2.8 Producing a Food Instrument Usage Report

Section 5 - 3.2.8.1 Food Instrument Usage Parameter

Report: fr_food_inst_usage

Fields

See report with same name in Finance Section 3-7.2.6.

Section 5 - 3.2.8.2 Food Instrument Usage Detail and Summary Report

Fields

See report with same name in Finance Section 3-7.2.6.

Section 5 - 3.2.8.3 Food Instrument Usage Summary Report

Fields

See report with same name in Finance Section 3-7.2.6.

Sort Criteria (Major to Minor):

Food Instrument Disposition (Ascending)

Background Process(es)

None.

Operations Management

Section 5 - 3.2.9 Producing a Participant Status Report

Section 5 - 3.2.9.1 WIC Participant Status Parameter

Report: fr_part_status

Fields

See Report with same name in Finance DTSD section 3-7.1.5

Section 5 - 3.2.9.2 WIC Participant Status Report

Fields

See Report with same name in Finance DTSD section 3-7.1.5

Sort Criteria (Major to Minor):

(Part 1) Organizational Unit Code (Ascending)

(Part 2) Client ID (Ascending)

(Part 3) Termination Reason Description (Ascending)

Background Processes:

None.

Section 5 - 3.2.9.3 CSF Participant Status Parameter

Report: fr_csf_part_status

Fields

See Report with same name in Finance DTSD section 3-7.1.5

Section 5 - 3.2.9.4 CSF Participant Status Report

Fields

See Report with same name in Finance DTSD section 3-7.1.5

Background Processes:

None.

Operations Management

Section 5 - 3.2.10 Producing a Time Study Summary Report

Section 5 - 3.2.10.1 Time Study Summary Parameter

Report: or_time_study_smry

Fields

Local Agency - Queries against O_ORGANIZATIONAL_UNITS.NAME.

 Lov: o_organizational_units. Lov is used for validation.

 Default = "All Agencies"

Clinic - Queries against O_ORGANIZATIONAL_UNITS.NAME.

 Lov: o_organizational_units. Lov is used for validation.

 Default = "All Clinics"

Staff - Queries against O_STAFF_MEMBERS.LAST_NAME,

 O_STAFF_MEMBERS.FIRST_NAME,

 O_STAFF_MEMBERS.MI1,

 O_STAFF_MEMBERS.MI2 ,

 Lov: o_staff_members. Lov is used for validation.

 Default = "All Staff"

Fiscal Year - Queries against O_STAFF_TIME_STUDIES.TIME_STUDY_DATE returning the four digit year portion of the date in format 'YYYY'.

Section 5 - 3.2.10.2 Time Study Summary Report

Fields

Local Agency - O_ORGANIZATIONS_UNITS.ORG_CODE

 O_ORGANIZATIONAL_UNITS.NAME

Clinic - O_ORGANIZATIONS_UNITS.ORG_CODE

 O_ORGANIZATIONAL_UNITS.NAME

Fiscal Year - Calculated from the Fiscal Year parameter field.

Employee Name - O_STAFF_MEMBERS_LAST_NAME

 O_STAFF_MEMBERS_FIRST_NAME

WIC Position / Title - O_STAFF_TITLES_DESCRIPTION for

 O_STAFF_MEMBERS.JD_ST_STAFF_TITLE_CODE

Date - O_STAFF_TIME_STUDIES.TIME_STUDY_DATE

Part. Services - SUM(O_STAFF_TIME_STUDIES.PART_SERVICES) / 60

Nutrition Education - SUM(O_STAFF_TIME_STUDIES.NUTR_ED) / 60

Breast feeding - SUM(O_STAFF_TIME_STUDIES.BREASTFEEDING) / 60

Administration - SUM(O_STAFF_TIME_STUDIES.ADMIN) / 60

Immunization - SUM(O_STAFF_TIME_STUDIES.IMMUNIZATION) / 60

CSFP - SUM(O_STAFF_TIME_STUDIES.CSFP) / 60

Tobacco - SUM(O_STAFF_TIME_STUDIES.TOBACCO) / 60

Other - SUM(O_STAFF_TIME_STUDIES.OTHER) / 60

Monthly Totals - SUM(# OF HOURS SPENT ON EACH WIC ACTIVITY)

Sort Criteria (Major to Minor):

Organizational Unit (Ascending)

Staff Member Last Name (Ascending)

Staff Member First Name (Ascending)

Calendar Date (Ascending)

Background Process(es)

None.

Operations Management

Section 5 - 3.2.11 Producing a Personnel Costs Summary Report

Section 5 - 3.2.11.1 Personnel Costs Summary Parameter

Report: or_persnl_costs_smry

Fields

Local Agency - Queries against O_ORGANIZATIONAL_UNITS.NAME.

 Lov: o_organizational_units. Lov is used for validation.

 Default = "All Agencies"

Clinic - Queries against O_ORGANIZATIONAL_UNITS.NAME.

 Lov: o_organizational_units. Lov is used for validation.

 Default = "All Clinics"

Report Type - Queries against the O_STAFF_TIME_STUDIES table enabling the user to select which service to choose for the report.

 Lov: Static (Participant Services, Nutrition Education, Breastfeeding, Administration, Immunization, CSFP, Tobacco or Other).

Dates From - Queries against O_STAFF_TIME_STUDIES.TIME_STUDY_DATE

Thru - Queries against O_STAFF_TIME_STUDIES.TIME_STUDY_DATE

Section 5 - 3.2.11.2 Personnel Costs Summary Report

Fields

From - Dates with format MM/DD/YYYY

Thru - Dates with format MM/DD/YYYY

Local Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE

 Name is O_ORGANIZATIONAL_UNITS.NAME

Clinic - O_ORGANIZATIONAL_UNITS.ORG_CODE

 Name is O_ORGANIZATIONAL_UNITS.NAME

Date - Dates with format MM/DD/YY

Name of Employee - O_STAFF_MEMBERS.LAST_NAME

 O_STAFF_MEMBERS.FIRST_NAME

WIC Position - O_STAFF_MEMBERS.ED_PROF_TITLES

Hours Worked in WIC - SUM(O_STAFF_TIME_STUDY.PART_SERVICES,

 O_STAFF_TIME_STUDY.NUTR_ED,

 O_STAFF_TIME_STUDY.BREAST_FEEDING,

 O_STAFF_TIME_STUDY.ADMIN) / 60

Hours Spent on XXXXXXXX - COUNT(O_STAFF_TIME_STUDY.XXXXXXX where XXXXXXXX is the Report Type.

Percent of WIC Time on XXXXXXXX - (Hours spent on XXXXXXXX / Hours worked in WIC) X 100

Gross Annual Salary Plus Benefits With WIC \$ - SUM(Total Salary(Hourly Salary x 2080 hrs/yr x FTE) + (Total Salary x ERE%))

Annual Empl Cost for XXXXXXXX - (% of WIC Time on 'XXXXXX') x (Gross Annual Salary + WIC \$

benefits)

Total - SUM(Hours worked in WIC) for all employees (Name of Employee).
SUM(Hours Spent on XXXXX) for all employees (Name of Employee).
SUM(Percent of WIC Time on XXXXX) for all employees (Name of Employee).
SUM(Gross Annual Salary Plus Benefits With WIC \$) for all employees (Name of Employee).
SUM(Annual Empl Cost for XXXXXX) for all employees (Name of Employee).

Sort Criteria (Major to Minor):

Organizational Unit (Ascending)
Calendar Date (Ascending)
Staff Member Last Name (Ascending)
Staff Member First Name (Ascending)

Background Process(es)

None.

Operations Management

Section 5 - 3.2.12 Producing an Annual WIC Cost Summary Sheet

Section 5 - 3.2.12.1 Annual WIC Cost Summary Sheet Parameter

Report: or_ann_wic_costs_smry

Fields

Local Agency - Clicking on the list of values allows the user to select whether to report on a single or all Local Agencies. For more information, please refer to the Organizational Units window.
Queries O_ORGANIZATIONAL_UNITS.NAME
Lov: o_organizational_units. Lov is used for validation.
Defaults to 'All Agencies'.

Fiscal Year - Four digit user entered year for which to generate the report.

Section 5 - 3.2.12.2 Annual WIC Cost Summary Sheet Report

Fields

Local Agency - O_ORGANIZATIONAL_UNITS.ORG_CODE
Name is O_ORGANIZATIONAL_UNITS.NAME

Fiscal Year - The four digit user entered year for which the report is generated with format YYYY, stored in O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR.

Personnel & ERE - (O_ANNUAL_WIC_COST_SUMMARIES.PERSONNEL_ERE) for all records with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to the user selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal to the user selected Local Agency for each O_STAFF_TIME_STUDIES service.

Professional & Outside Services -

SUM(O_ANNUAL_WIC_COST_SUMMARIES.PROF_OUTSIDE_SERVICES) for all records with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to the user selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal to the user selected Local Agency for each O_STAFF_TIME_STUDIES service.

Travel Costs - SUM(O_ANNUAL_WIC_COST_SUMMARIES.TRAVEL_COSTS) for all records with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to the user selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal to the user selected Local Agency for each O_STAFF_TIME_STUDIES service.

Occupancy Costs - SUM(O_ANNUAL_WIC_COST_SUMMARIES.OCCUPANCY_COSTS) for all records with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to the user selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal to the user selected Local Agency for each O_STAFF_TIME_STUDIES service.

Other Operating Costs -

SUM(O_ANNUAL_WIC_COST_SUMMARIES.OTHER_OPERATING_COSTS) for all records with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to the user selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal

to the user selected Local Agency for each O_STAFF_TIME_STUDIES service.

Capital Costs - SUM(O_ANNUAL_WIC_COST_SUMMARIES.CAPITAL_COSTS) for all records with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to the user selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal to the user selected Local Agency for each O_STAFF_TIME_STUDIES service.

Indirect Costs - SUM(O_ANNUAL_WIC_COST_SUMMARIES.INDIRECT_COSTS) for all records with O_ANNUAL_WIC_COST_SUMMARIES.FISCAL_YEAR equal to the user selected fiscal year and O_ORGANIZATIONAL_UNITS.ORG_CODE equal to the user selected Local Agency for each O_STAFF_TIME_STUDIES service.

Total (rows) - SUM(Personnel & ERE + Professional & Outside Services +Travel Costs + Occupancy Costs + Other Operating Costs + Capital Costs + Indirect Costs) for each O_STAFF_TIME_STUDIES service.

Total(columns) - SUM(Client Services, Nutrition Education, Breast Feeding Promotion, Administration, Immunization, CSFP, Tobacco, and Other) for each O_ANNUAL_WIC_COST_SUMMARIES activity.

Date - This spot will contain the date of the signature.

Signature of Program Director - This spot will contain the signature of the program's director

Sort Criteria (Major to Minor):

Organizational Unit (Ascending)

Background Process(es)

None.

Operations Management

Section 5 - 3.2.13 Producing a Local Agency Annual Report

Report: No database name.

This report is contained in a WordPerfect Document to be used by each Local Agency Director.