



*Delaware Health
And Social Services*

DIVISION OF MANAGEMENT SERVICES

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SERVICES PROJECT

FOR

DIVISION OF PUBLIC HEALTH

Date Due: October 22, 2014
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ATTACHMENT # 2

Please Note:

THE ATTACHED SHEETS HEREBY BECOME A PART OF THE ABOVE
MENTIONED BID.

Delaware System Transfer and Support WIC on the Web (WOW)
EBT Readiness Design Document Version 0.3 7/8/13

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Delaware System Transfer and Support
WIC On the Web (WOW)

EBT Readiness Design Document

Version: 0.3
7/8/13

Prepared for
Delaware Health and Social Services
Women, Infants, and Children (WIC) Program

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1 Introduction

EBT Readiness is part of the WOW change request tasks, CR 11. The goal is to make for an easier EBT transition for Delaware, Maryland, and the Virgin Islands. In addition, make the necessary modifications for the WOW system to be in compliance with the WIC Universal MIS-EBT Interface.

1.1 Purpose

The purpose of this document is to define the requirements associated with EBT Readiness and the WOW system for Delaware.

This document is separated into the following areas:

- WIC EBT Universal Interface Functions
- WOW Screen Modifications
- New EBT Screens

1.2 References

The following list of references are associated with the Design document.

- WIC Universal MIS-EBT Interface Functional Requirements June 2012
- J.P. Morgan WIC Interface Document – May 16, 2013
- EBT Readiness Requirements Document

2 EBT Interface

2.1 Requirements

The following functions will be implemented in the WOW system.

2.1.1 Message Based System Interface (Req# 1.0)

- Add EBA (Req # 1.1.1) (WIC Universal EBT Interface Req # 6.1.1)
 - This function will be used by the WIC system to establish a new household/family account in the EBT system. Upon successful creation of a new Family within the WIC system, after duplicate record checking, after establishment of the unique Family Identifier, the Family information will be communicated to the EBT system with a call to the Web Service function.

- Update EBA (Req # 1.1.2) (WIC Universal EBT Interface Req # 6.1.2)
 - When changes to EBA data elements are made within the WIC system, the Update EBA function will be used to communicate the modifications. If only a single data element is modified, WIC will still communicate all data elements, so that the EBT system can simply save all EBA fields.

- Get EBA Details (Req # 1.1.3) (WIC Universal EBT Interface Req # 6.1.3)
 - This function is used to return detailed household information from the WIC EBT system to the WIC system.

- Add or Update Benefits (Req # 1.2.1) (WIC Universal EBT Interface Req # 6.2.1)
 - When Food Benefits are created/modified within the WIC system to create a new issuance, adjust or void benefits, a web service call will be made. The function will notify the EBT system of an issuance (credit) or void (debit) to benefits. Each adjustment to the food benefit amount will contain a unique benefit identifier which the EBT system will return in the Daily Benefit Activity Batch File so that complete reconciliation is possible. Multiple Food Benefits (Cat-SubCat-Qty) can be transmitted within a single Benefit Month. If multiple benefit months are issued within the WIC system for a single family, the Adjust Benefits web service function will be called multiple times. Errors in transmission timeout or business rule logic will abort the processing in the WIC system, be logged for posterity and a proper message will be presented to the WIC user.

- Get Benefit Balance (Req # 1.2.2) (WIC Universal EBT Interface Req # 6.2.2)
 - This function is used to query the current benefit balance for one Family at a time. The WIC system will utilize this function to present the family's benefits on the screen during formula exchanges and prescription modification processing.

- Get Benefit Redemption History (Req # 1.2.3) (WIC Universal EBT Interface Req # 6.2.4)
 - In order to troubleshoot benefit activity and to see the history of benefit modifications for a given family, the WIC system shall contain a screen that allows the clinic user to investigate benefit activity. The WIC system will call the Get Redemption Transaction History Web service function to query real time WIC Purchase information that has occurred within the EBT system. The EBT system will return a listing of all activity for a given family and a given period of time.

- Add Cardholder/Card (Req # 1.3.1) (WIC Universal EBT Interface Req # 6.3.1)
 - The Add Cardholder/Card function is used to associate a new card and cardholder to a specific family's Electronic Benefit Account. The WIC system will utilize this web service function to notify the EBT system of the physical issuance of a new EBT Card to the Family's Parent/Guardian 1 or 2, their Proxy 1 or 2, or the Caretaker. A screen within the WIC system presents a listing of potential family cardholders for selection and manages the initial issuance of the card to the cardholder. The system will allow the user to select and save the cardholder and this function will communicate the activity to the EBT system.

- Get Cardholders/Cards (Req # 1.3.2) (WIC Universal EBT Interface Req # 6.3.3)
 - This function allows the WIC system to access the WIC EBT system, obtain card and cardholder data associated with an EBA and display that data via the WIC user interface. Update Card - If an EBT Card has been lost or stolen, the WIC system can send this interface command to the EBT system to set a card's status to inactive. The WIC system will never reactivate an online EBT card so the second feature that this function supports will not be utilized. Each card status change will include a Reason code that communicates this additional data to the EBT system.

- Update Card (Req# 1.3.3) (WIC Universal EBT Interface Req # 6.3.4)
 - If an EBT Card has been lost or stolen, the WIC system can send this interface command to the EBT system to set a card's status to inactive. The WIC system will never reactivate an online EBT card so the second feature that this function supports will not be utilized. Each card status change will include a Reason code that communicates this additional data to the EBT system.

- Get Card History (Req # 1.3.4) (WIC Universal EBT Interface Req # 6.3.6)
 - This function provides cardholder search capability to MIS systems and returns information about the cards and cardholders matching the query criteria.

2.1.2 Batch Interface (Req# 2.0)

- Report Card Updates Batch File (Req #2.1) (WIC Universal EBT Interface Req # 6.3.5)
 - The Report Card Updates File returns modifications to the card status made from outside of the WIC clinic and the WIC system. The WIC system will automatically process this batch file in order to maintain an accurate account of EBT card status. The real time availability of card status is provided by the Get Cardholders/Cards for Household Web service function. The Batch File will be exchanged once a day.

- Add WIC Vendor (Req #2.2) (WIC Universal EBT Interface Req # 6.4.1)
 - The WIC Vendor Batch File communicates basic demographic data, contact information and authorization timeframe dates to the EBT system. The batch file will be generated by the WIC system once a day and will contain only the incremental changes to Vendor information made during the previous processing day. The file will be sent to the EBT system and an acknowledgement file will confirm proper processing.

- Add or Update Category/Sub-Category Information (Req #2.3.1) (WIC Universal EBT Interface Req # 6.5.3)
 - The WIC system will create a listing of Food Category and Food Subcategory combinations that are available for active issuance and redemption activity. The Category/Subcategory Batch File will communicate the State's description of each and their allowable combinations to the EBT system. The batch file will be automatically communicated once a day and alternatively can be manually generated on demand. Each file will contain the full collection of authorized category and subcategory combinations. The file will only be generated automatically when modifications to the data are made within the WIC system.

- Add or Update UPC/PLU Information (Req #2.3.2) (WIC Universal EBT Interface Req # 6.5.4)
 - This batch file interface point communicates the State's authorized UPC/PLU list as well as the not to exceed price for each product in every Vendor Peer Group. Incremental changes to the UPC or NTE values will be communicated once a day to the EBT system.

- Report WIC Benefit Changes Batch File (Req #2.5) (WIC Universal EBT Interface Req # 6.6.3)
 - The file will return the benefit transactions that occurred between a single calendar day as defined by the EBT Vendor. The Adjust Benefit Web service function is the lone method that can modify the benefit balance and it is expected that the EBT system can return each successful adjust benefit transaction in the Daily Benefit Activity batch file. Purchase transactions affect the benefit balance but those will be evaluated by using the Redemption batch file. The Reconciliation activity this file supports will be one that validates the benefit activity transactions recorded in WIC system exactly matches the

benefit activity known to the EBT system. The file will be exchanged one time a day.

- Report WIC Benefit Data Redemption Batch File (Req #2.6) (WIC Universal EBT Interface Req # 6.6.1)
 - The details about EBT purchases will be returned by the EBT system to WIC system in the Redemption Batch File. The WIC system will use this purchase information to calculate NTE values, create rebate invoices, generate price trend analyses, project future food costs, calculate WIC Vendor redemption totals and perform vendor high risk analysis. The redemption file will be generated once a day and will be based on the settled day as defined by the EBT provider and the State.

3 Current Screen Modifications

3.1 Family Information Screen (Req# 3.1)

The Precertification and Family Information screens will be modified to include the Head of Household’s Date of Birth.

3.1.1 Screen shots

The screenshot displays a web-based form for entering family information. At the top, there are fields for Family ID (2662501), Head of Household Last Name (Test), First Name (Hannah), MI, Birth Date (9/1/1998), and Clinic Name (010311 Anna C. Shipley State S...). Below this, there are sections for Street Address (123 Wic Lane, SEAFORD, DE, Sussex, 19973) and Mailing Address (123 Wic Lane, SEAFORD, DE, Sussex, 19973). There are also checkboxes for 'Same as Street Address' and 'No Mailing', and radio buttons for 'Phone' and 'Walk-in' under 'Contact Type'. A 'Referred From' dropdown and 'Local Provider' field are also present.

The 'Applicant*' section contains a table with the following data:

ID	Birth Date	Category	Last Name	First Name	MI	Gender	Foster	Appt. W...	Status
300 017 766	2/1/2013	IBP Infant BF Partially	Test	Carolyn		Female	<input type="checkbox"/>	<input type="checkbox"/>	Active
102 493 948	8/9/2012	IFF Infant Formula Fed	Test	Tracey		Male	<input type="checkbox"/>	<input type="checkbox"/>	Active
300 016 244	11/21/2011	C1 Child Age 1	test	victoria		Female	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Active
102 493 902	4/8/1982	WPP Woman Post-Partum	Test	Roberta		Female	<input type="checkbox"/>	<input type="checkbox"/>	Active

Below the table are 'Add' and 'Remove' buttons. To the right, there are fields for 'Email Address:', 'Family Size*' (5), 'Disabilities:' (Hearing Impaired), and 'Language*' (English), along with a 'Translator Required' checkbox. At the bottom right, there are 'New', 'Save', 'Cancel', and 'Next' buttons.

Figure 1 – Precertification

The screenshot shows a web-based form for entering family information. The form is organized into three main sections: Family Information, Income Information, and Additional Information. The Family Information section includes fields for Family ID, Clinic, and personal details for the Head of Household and two proxies. It also includes address fields for both street and mailing addresses, with checkboxes for 'Same as Street Address' and 'No Mailing'. A table for phone numbers is located below the address fields. To the right of the table are fields for Family Size and Income. At the bottom of the form, there are buttons for 'Add', 'Remove', 'MCI Details', 'Save', 'Cancel', and a navigation arrow.

Figure 2 - Family Information

3.1.2 Business Rules

- Birth date field is mandatory and must be completed prior to saving the screen.
- The **Add EBA** function (WIC Universal EBT Interface Req # 6.1.1) will be used when new family records are created.
- The **Update EBA** function (WIC Universal EBT Interface Req # 6.1.2) will be used if the following fields are modified:
 - Head of Household Name
 - Head of Household Birth Date
 - Mailing Address
 - Gender

3.1.3 Message Content and Format

See section 6.1.1 of the J.P. Morgan WIC Interface Document dated 5/16/13.

3.2 Food Prescription Screen (Req# 3.2)

The Schedule Day field will be replaced with the Benefits Start Date on the Food Prescription screen.

3.2.1 Screen shots

The screenshot displays the 'Food Prescription' screen with two tabs: 'Current' and 'History'. The 'Current' tab is active. The form includes the following fields and sections:

- Family Name:** Hannah Test
- Benefits Start Date(Base Participant):** (Empty field)
- Pickup Interval:** Trimonthly
- Amount of Breastfeeding:** Pickup Interval*: Trimonthly (dropdown)
- Table:**

Date	Amount
5/5/2013	Some (> 14 oz formula per day)
- Buttons:** Add (blue), Remove (red)
- Table:**

Description	Effect Date	End Date	DateCreated
C1 (C2/C3/C4 w/RX) -1# CHEESE - BREAD, B...	2/1/2014	2/28/2014	5/2/2013 10:1...
- Buttons (right side):** Packages (blue), Remove (red), Customize (yellow)
- Buttons (bottom):** Display (yellow), Formulary Details (yellow), Monitoring (yellow), Formula Calculator (yellow), History / Void (green), Save (blue), Cancel (orange), Next (green)

Figure 3 - Food Prescription

3.2.2 Business Rules

- Benefits Start Date will be a read only field and will populate when benefits are first issued to the family. The Benefit Start Date will be used for all issuances for the family.
- The replacement of the Schedule Day with the Benefits Start Date will be done prior to the transition to EBT. A conversion will take place for current participants to map their existing Schedule Day to the new Benefits Start Date.

3.3 Agency/Clinic Setup (Req# 3.3)

The Agency/Clinic Setup screen in the WOW Admin module will be modified to enable or disable EBT functionality at the local agency or clinic level.

3.3.1 Screen shots

The screenshot displays the Agency/Clinic Setup interface. It includes several sections:

- Organization:** Level: CLINIC, Status: Open, Organization: 010101, James W. Williams State Service, Parent Org: [empty]
- Address:** Street Line 1*: 805 River Road, Street Line 2: [empty], City/State*: DOVER, DE, County: Kent, 19901, Contact: Keen, Andrea, Email: [empty]
- Issuance Frequency:** Trimontl, with checkboxes for Has Mini-MICR, Exclude Caseload, Print Appt Notice, Add Sch Columns, Signature, Scan, Cap, and EBT Enabled.
- Phones:** A table with columns Phone Type, Phone Number, and Ext. It contains one entry: Clinic Office Phone, (302) 857-5110, [empty]. Buttons for Add and Remove are present.
- Navigation:** Buttons for New, Delete, Save, Cancel, and Close at the bottom.

Figure 4 – Agency/Clinic Setup

3.3.2 Business Rules

- An 'EBT Enabled' checkbox will be added to the screen at both the Local Agency and Clinic level. Checking this checkbox will activate the EBT functionality in the WOW Clinic Module.
- If a new clinic is added or a current clinic is modified, the WIC EBT vendor will be notified directly. No batch message function will be implemented.

4 New EBT Screens

4.1 EBT Account Maintenance (Req# 3.4)

The EBT Account Maintenance screen is used to assign EBT cards. Replacement cards received through the Card Change Batch File will be shown here.

4.1.1 Screen shots

Family: Clinic:

EBT Accounts

Card Holder Type	Card Holder Name	Card No	Date Issued	Status
AUTHORIZED PERSON	Tester, Elizabeth	5077118046697642	5/22/2009	Active

EBT Accounts History

Card Holder Type	Card Holder Name	Card No	Date Issued	Status	Changed on	Replac
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Figure 5 - EBT Account Maintenance

Get Account Details

Head of Household Name: Date of Birth :

Mailing Address :
 Gender :

Language :

Type: Status:

Figure 6 - Get Account Details

Get Card History

Card number

Start Date: End Date :

History

Card Number	Cardholder Name	Type	Date Issued	Status	Action	Replacement Card	Reason	Family ID

Figure 7 - Get Card History

Get Cardholders/Cards

Card number

Start Date: End Date :

Cardholders/Cards Data

Card Number	Cardholder Name	Address	DOB	Language	Phone	Type	Family ID	Effective Date	Reason	Status

Figure 8 - Get Cardholders/Cards

4.1.2 Business Rules

- EBT Cards will be issued to the Authorized Person. The **Add Cardholder/Card** function (WIC Universal EBT Interface Req # 6.3.1) will be used on the EBT Account Maintenance screen.
- The EBT Accounts History Card grid will show details regarding the EBT Account History. The data shown in the grid will be results of the **Report Card Updates** (WIC Universal EBT Interface Req # 6.3.5) batch file.
- Clicking the “Stop Access” button will provide the user the capability to stop access on a card at any time. The **Update Card** function (WIC Universal EBT Interface Req # 6.3.4) will be used in this scenario.
- The **Get EBA Details** function (WIC Universal EBT Interface Req # 6.1.3) will be used on this screen when clicking the “Get Account Details” button.
- The **Get Card History** function (WIC Universal EBT Interface Req # 6.3.6) will be used on this screen when clicking the “Get Card History” button.
- The **Get Cardholders/Cards** function (WIC Universal EBT Interface Req # 6.3.3) will be used on this screen when clicking the “Get Cardholders/Cards” button.

4.1.3 Message Content and Format

See section 6.3 of the J.P. Morgan WIC Interface Document dated 5/16/13. Get EBA Details message does not exist in the Interface Document.

4.2 Issue Benefits Screen (Req# 3.2)

The Issue Checks screen will be replaced with the Issue Benefits screen in the WOW Clinic Module. Schedule Day and Next Check fields will be replaced with Benefits Loaded Through (BLT) date and Benefits Valid Through (BVT) date.

4.2.1 Screen shots

The screenshot displays a web interface for issuing benefits. At the top, there is a search form with the following fields: "Family Name" (text input with "Mary Smith"), "Clinic" (dropdown menu with "010101 James W. Williams State Service"), "Issue Month" (dropdown menu with "June"), and "Issue Year" (dropdown menu with "2013"). A green "Go" button is located to the right of the "Issue Year" dropdown.

Part. ID	Participant Name	Status	Cert End	BLT Date	BVT Date	Interval	Issue	Prorate
102 282 062	Smith, Jack	A	03/31/2014			Trimonthly	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Below the table is a large empty rectangular area. At the bottom of the screen, there is a "Number of Participants" field with the value "1" and a row of five buttons: "Signature" (red), "Batch Checks" (green), "Preview" (yellow), "Issue Benefits" (purple), and "Cancel" (orange).

4.2.2 Business Rules

- The **Add or Update Benefits** function (WIC Universal EBT Interface Req # 6.2.1) will be initiated when benefits are issued.

- For trimonthly issuance, one month of benefits will be sent at a time. Benefits will be loaded 'x' number of days prior to the benefit start date for future months. This parameter has yet to be defined.

4.2.3 Message Content and Format

See section 6.2.1 of the J.P. Morgan WIC Interface Document dated 5/16/13.

4.3 Benefits Inquiry Screen (Req# 3.5)

The Benefits Inquiry screen displays all benefits issued to the family for each month of benefits.

4.3.1 Screen shots

Family: Clinic:

Start Date		End Date						
6/4/2013		7/3/2013						
Package Size	Food Item	Issued	Redeemed	Expired	Voided	Remain		
GAL	WHOLE MILK	4	0	0	0	4		
HGL	2%, 1%, 1/2% Skim or Buttermilk	1	0	0	0	1		
LB	CHEESE (\$8.00 MAX PER LB.)	1	0	0	0	1		
DOZ	EGGS	2	0	0	0	2		
CAN	12 OZ FROZEN CONC	3	0	0	0	3		
CAN	46 oz Juice	4	0	0	0	4		
OZ	CEREAL	72	0	0	0	72		
JAR	18oz Pnut Btr lb Dry,15-16ozCn Bean	3	0	0	0	3		
QT	2%, 1%, 1/2%, Skim or Buttermilk	1	0	0	0	1		
LB	WHOLE GRAINS	3	0	0	0	3		
\$\$\$	FRESH FRUITS AND VEGETABLES	16	0	0	0	16		
BTL	64 OZ JUICE	2	0	0	0	2		
7/4/2013		8/3/2013						
Package Size	Food Item	Issued	Redeemed	Expired	Voided	Remain		
GAL	WHOLE MILK	4	0	0	0	4		
HGL	2%, 1%, 1/2% Skim or Buttermilk	1	0	0	0	1		
LB	CHEESE (\$8.00 MAX PER LB.)	1	0	0	0	1		
DOZ	EGGS	2	0	0	0	2		
CAN	12 OZ FROZEN CONC	3	0	0	0	3		

4.3.2 Business Rules

- This screen will be read-only.
- The **Get Benefit Redemption History** function (WIC Universal EBT Interface Req # 6.2.4) will be used to display benefit information on this screen.

- The WOW system will void any unused benefits when they expire.

4.3.3 Message Content and Format

See section 6.2.3 of the J.P. Morgan WIC Interface Document dated 5/16/13.

4.4 Benefits History (Req# 3.6)

The Benefits History screen provides a combined view of all food items issued to the family per month and the quantity and description of each food item as well as the Benefit Issuance Number.

4.4.1 Screen shots

Family: 9339655 - Jenny Smith Clinic: 061851 Clare County WIC Office

Start Date		End Date			
8/4/2013		9/3/2013			
Benefit Issue Number		Re-Issue Reason			
06511010922228					
Pkg S...	Food Item	Qty.	Trans...	Transaction ...	Transaction Date
GAL	WHOLE MILK	4	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM
HGL	2%, 1%, 1/2% Skim or Buttermilk	1	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM
LB	CHEESE (\$8.00 MAX PER LB.)	1	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM
DOZ	EGGS	2	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM
CAN	12 OZ FROZEN CONC	3	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM
CAN	46 oz Juice	4	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM
OZ	CEREAL	72	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM
JAR	18oz Pnut Btr lb Dry,15-16ozCn Bean	3	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM
QT	2%, 1%, 1/2%, Skim or Buttermilk	1	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM
LB	WHOLE GRAINS	3	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM
\$\$\$	FRESH FRUITS AND VEGETABLES	16	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM
BTL	64 OZ JUICE	2	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM
7/4/2013		8/3/2013			
Benefit Issue Number		Re-Issue Reason			
06511010922227					
Pkg S...	Food Item	Qty.	Trans...	Transaction ...	Transaction Date
GAL	WHOLE MILK	4	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM
HGL	2%, 1%, 1/2% Skim or Buttermilk	1	Issue	PANUNZIOC...	6/4/2013 1:12:40 PM

Cancel

4.4.2 Business Rules

- This screen will be read-only and will display detailed issuance from the WOW system which is sent to the EBT system. This is a one way transfer of data.

4.4.3 Message Content and Format

Does not involve an interface with the EBT system.

4.5 Benefits Void Screen (Req# 3.7)

The Benefits Void screen allows the user to void current and future month's benefits for the family.

4.5.1 Screen shots

Family: Clinic:

Benefits: Current Future Select All

Start Date		End Date					
06/04/2013		07/03/2013					
Benefit Issue Number	Package Size	Food Item	Issued	Remain	Void All	Void Partial	
06511010922226	GAL	WHOLE MILK	4	4	<input type="checkbox"/>		
06511010922226	HGL	2%, 1%, 1/2% Skim or Buttermilk	1	1	<input type="checkbox"/>		
06511010922226	LB	CHEESE (\$8.00 MAX PER LB.)	1	1	<input type="checkbox"/>		
06511010922226	DOZ	EGGS	2	2	<input type="checkbox"/>		
06511010922226	CAN	12 OZ FROZEN CONC	3	3	<input type="checkbox"/>		
06511010922226	CAN	46 oz Juice	4	4	<input type="checkbox"/>		
06511010922226	OZ	CEREAL	72	72	<input type="checkbox"/>		
06511010922226	JAR	18oz Pnut Btr lb Dry, 15-16oz Cn Bean	3	3	<input type="checkbox"/>		
06511010922226	QT	2%, 1%, 1/2%, Skim or Buttermilk	1	1	<input type="checkbox"/>		
06511010922226	LB	WHOLE GRAINS	3	3	<input type="checkbox"/>		
06511010922226	\$\$\$	FRESH FRUITS AND VEGETABLES	16	16	<input type="checkbox"/>		
06511010922226	BTL	64 OZ JUICE	2	2	<input type="checkbox"/>		

4.5.2 Business Rules

- Current month's benefits can either be voided partially or voided all at once.
- Future months can only be voided all at once.
- The **Add or Update Benefits** function (WIC Universal EBT Interface Req # 6.2.1) will be initiated when benefits are voided.

4.5.3 Message Content and Format

See section 6.2.1 of the J.P. Morgan WIC Interface Document dated 5/16/13.

4.6 Benefits Balance (Req# 3.8)

The Benefits Balance screen displays the remaining balance of each food item issued.

4.6.1 Screen shots

Family: Clinic:

Start Date		End Date				
4/8/2013		5/7/2013				
Food Item	Package Size	Category	Subcategory	Remain		
Cheese 16 oz package	LB	02	001	0		
Large White Eggs	DOZ	03	000	0		
Breakfast Cereal 11-36 oz pkg	OZ	05	000	0		
Peanut Butter 16-18 oz jar	JAR	06	001	0		
Beans16oz Dry/4 Cans 15-16oz can	BAG	06	101	0		
Baby Cereal 8-16 oz pkg	OZ	09	000	0		
BabyFruits&Veg 4-8oz jar or package	OZ	12	000	0		
Whole Grains 14-16 oz pkg	LB	16	000	0		
Fruits & Vegetables	\$\$\$	19	000	0		
12.7oz Gerber Gentle Powder	CAN	21	057	0		
Lact Free 1%/FF Milk	GAL	52	006	0		
1%/FatFrMilk-Ref/UHT Quart Size	QT	52	101	0		
1%/Fat Free Milk Half Gal Size	HGL	52	102	0		
1% or Fat Free Milk - Refrig or Dry	GAL	52	106	0		
Juice 48oz/11.5-12oz (96 oz = 2)	BTL	53	101	0		
Juice64oz (128 oz=2)	BTL	54	102	0		
5/8/2013		6/7/2013				
Food Item	Package Size	Category	Subcategory	Remain		
Cheese 16 oz package	LB	02	001	2		

4.6.2 Business Rules

- This screen is read-only.
- The **Get Benefit Balance** function (WIC Universal EBT Interface Req # 6.2.2) will be initiated when benefits are voided.

4.6.3 Message Content and Format

See section 6.2.2 of the J.P. Morgan WIC Interface Document dated 5/16/13.

4.7 EBT Cards Inventory (Req# 3.9)

The EBT Card Inventory screen is designed to manage the EBT Cards used in each clinic.

4.7.1 Screen shots

Clinic: 061851 Clare County WIC Office Go

Beginning Number*	Ending Number*	Restocking Alert Quantity (Suggested 5 boxes, each Box contains 500 Cards.)*	Show Restocking Alert	Date Of Transaction	Status	Auth. Initials*
507711803948838	507711803948994	1	<input type="checkbox"/>	1/8/2009	Close	jk
507711804135680	507711804136179	3	<input type="checkbox"/>	1/8/2009	Close	JK
507711805960613	507711805961112	2	<input checked="" type="checkbox"/>	5/12/2010	Active	jk

Add Remove

Transfer Save Cancel Close

4.7.2 Business Rules

- The screen will be modified to accommodate the quantity of cards within a box based on the EBT vendor. This is an established parameter in the database.

4.8 UPC Upload – Nutrition Module (Req# 3.10)

The UPC Upload screen is used to initially upload UPC items and their prices to the system. Once the bulk upload of UPCs are completed, the automated NTE monthly process will take over.

4.8.1 Screen shots

Please specify the UPC Items & Prices File to upload.

File Name*: Browse...

Upload

Upload Errors:

UPC	PGA	Upload Error
-----	-----	--------------

Upload Status:

	UPC	PGA Price
Total Processed		
Items Added		
Already Exists		
Errors		

Cancel

4.8.2 Business Rules

- The UPC must be 8, 12 or 13 digits
- The UPC must pass the check digit calculation.
- Any UPCs already in the system will be rejected as duplicates

4.8.3 File format and Content

4.8.3.1 UPC Up-Load File Format:

- 1) UPC Code – 8, 12, or 13 digit UPC Code (Ex. 000651712017)
- 2) Category – Category code (Ex. 19)
- 3) Sub Cat – Sub Category Code (Ex. 001)
- 4) Manufacturer – Manufacture (Ex. 021000 Kraft)
- 5) Brand Name – Brand Name – (Ex. Ocean Mist Farms)

- 6) Food Desc – Food Description (Ex. Baby Artichokes)
- 7) Package Size – Package Size – (Not used)
- 8) Quantity – Quantity (Ex. 32)
- 9) Unit of Measure – Unit of Measure associated with item 8, (ea. –each, oz. – ounces)
- 10) Package Type – Package Type (Ex. Box)
- 11) Auth Date – Authorization Date (Ex. 3/20/2013)
- 12) Effective Date – Effective Date (Ex. 3/20/2013)
- 13) Action Code – Action Code (Not Used)
- 14) Reason Code – Reason Code (Not Used)
- 15) Exchange Size – Exchange Size (Ex. 1)
- 16) Authorized – Authorized (Ex. 1)
- 17) Prod Desc – Product Description - (Ex. Fresh artichokes)
- 18) Formula Class – Formula Class – (Ex Class 1)
- 19) PLU Indicator – PLU Indicator – (PLU – P, UPC – U)
- 20) De-Activation Date – De-Activation Date (Ex. 1/1/2030)
- 21) Broadband Flag – Broadband Indicator (1 = Yes, 0 = No)

Here is the sample format: (Note all columns are separated by “|”

000651712017|19|001||Ocean Mist Farms|Baby
 Artichokes||32|oz||3/20/2013|3/20/2013|||1|1|Fresh artichokes||U|1/1/2030|1

4.8.3.2 UPC Price Up-Load File Format:

Header Record

*****UPC PRICE*****

Detail Records

- 1) UPC Code – 8, 12, or 13 digit UPC Code (Ex. 000651712017)
- 2) Peer Group – 1 – 18 (Ex. 1)
- 3) Price – format 999.99 (Ex. 3.50)

4.9 *UPC Maintenance – Nutrition Module (Req# 3.11)*

The UPC Maintenance screen allows the user to update the information or price associated with one or more UPC items.

4.9.1 Screen shots

The screenshot displays a software interface for searching UPCs. It is divided into two main sections: 'UPC Search Criteria' and 'UPC Search Result'.

UPC Search Criteria: This section contains several input fields and a search button. On the left, there are three text input fields labeled 'UPC Code:', 'Food Description:', and 'Manufacturer:'. To the right of the 'UPC Code' field is a 'PLU Indicator' checkbox. Further right are two dropdown menus labeled 'Category:' and 'Sub Category:'. Below these is another dropdown menu labeled 'Authorized:'. A yellow 'Find' button is located to the right of the 'Authorized' dropdown.

UPC Search Result: This section features a table with a header row and a large empty body. The header row has six columns: 'Authorized', 'UPC Code', 'Food Description', 'Manufacturer', 'Category', and 'Sub-Cat'. The body of the table is currently empty.

Bottom Navigation: At the bottom of the interface, there are five buttons: 'Edit' (yellow), 'New' (light blue), 'Max Price' (light green), 'Cancel' (orange), and 'Close' (green).

4.10 UPC Max Price Change – Nutrition Module (Req# 3.12)

UPC Max Price Adjustments is used to change prices of food items through % change, flat price change, or apply the current price to the State Entered Amount.

4.10.1 Screen shots

UPC Max. Price Change

UPC Category*:

UPC Sub Category*:

Unit Size: Go

Statewide Avg. State Entered Amount:

Price Change: % Change

Flat Price Change:

Apply Current Price to State Entered Amount

Effective Date*:

Save Cancel Close

5 Batch Interfaces

5.1 *Cardholder/Card Maintenance (Req# 2.1) (WIC Universal EBT Interface Req # 6.3.5)*

The Report Card Updates File returns modifications to the card status made from outside of the WIC clinic and the WIC system. The WIC system will automatically process this batch file nightly in order to maintain an accurate account of EBT card status. The file format will be a fixed length format.

5.1.1 Record Content and Format

Not in the J.P Morgan ICD dated 5/1/2013.

5.1.2 Business Rules

- During Batch File processing the WOW System will insert the EBT card depending upon whether the card number is already known to the WOW System.
- Errors will be logged for any records that cannot be processed.

5.2 *WIC Vendor Batch (Req# 2.2) (WIC Universal EBT Interface Req # 6.4.1)*

The WIC Vendor Batch File communicates basic demographic data, contact information and authorization timeframe dates to the EBT system. The Batch File will be generated by the WOW system once a day and will contain only the incremental changes to Vendor information made during the previous processing day. The file will be sent to the EBT system and an acknowledgement file will confirm proper processing.

5.2.1 Record Content and Format

See section 6.4 of the J.P. Morgan WIC ICD dated 5/16/13.

5.2.2 Business Rules

- During the Vendor Batch File generation the WOW System will add a record to this file if any of the data associated with any of the fields contained in this file is modified in the WOW system.
- The file will be generated as part of the WOW End of Day processing.
- If no Vendor data has changed, the system will send an empty file to the EBT vendor.
- This process will run after the terminate vendor process to ensure that vendors that have come to the end of their authorization period are sent on authorization end date and not the next day.

5.3 Category/Subcategory Batch File (Req# 2.3) (WIC Universal EBT Interface Req # 6.5.3)

The WIC system will create a listing of Food Category and Food Subcategory combinations that are available for active issuance and redemption activity.

5.3.1 Record Content and Format

See section 6.5.1 of the J.P. Morgan WIC ICD dated 5/16/13.

5.3.2 Business Rules

- During Category/Subcategory Batch File generation the WOW System will create a file containing all active Category and Subcategory combinations whenever any field contained in this file is modified in the WOW system.
- The file will be generated as part of the WOW End of Day processing.
- If no data is changed, the system will send an empty file to the EBT vendor

5.4 Add/Update UPC/PLU File (Req# 2.3) (WIC Universal EBT Interface Req # 6.5.4)

The WIC system will create and transmit a file with the data required to create and maintain the APL (Authorized Product List). This data identifies valid WIC products and is used for validation when authorizing WIC purchase transactions.

5.4.1 Record Content and Format

See section 6.5.2 of the J.P. Morgan WIC ICD dated 5/16/13. Note: current IF does not address 13 digit UPCs.

5.4.2 Business Rules

- During Add/Update UPC/PLU generation the WOW System will create a file containing the UPC/PLU and associated prices at the peer group level whenever any field contained in this file is modified in the WOW system for the given UPC/PLU. The addition of a UPC is considered a change assuming it has had NTE prices assigned or is in Category 19. Note: If a UPC/PLU that is not in Category 19 is added no record will be written to this file until the prices have been entered.
- The file will be generated as part of the WOW End of Day processing.
- If no data is changed, the system will send an empty file to the EBT vendor.
- This file will also be generated as part of the monthly NTE price approval process.

5.5 Report WIC Benefit Changes Batch File (Req # 2.4) (WIC Universal EBT Interface Req # 6.6.3)

The file will return the benefit transactions that occurred between a single calendar day as defined by the EBT Vendor. This file is processed by the MIS to ensure that all benefits issued by the MIS system were received by the EBT system.

5.5.1 Record Content and Format

See section 6.10.1 of the J.P. Morgan WIC ICD dated 5/16/13.

5.5.2 Business Rules

- The file will be processed as part of the WOW End of Day (EOD) processing.
- EOD will compare data received in this file with data sent to the EBT Vendor for the same period of time. Any mis-matches in data will be written to the EOD log for investigation.

5.6 Report WIC Benefit Data Redemption Batch File (Req# 2.5) (WIC Universal EBT Interface Req # 6.6.1)

The details about EBT purchases will be returned by the EBT system to the WIC system in the Redemption Batch File.

5.6.1 Record Content and Format

See section 6.8.1 of the J.P. Morgan WIC ICD dated 5/16/13.

5.6.2 Business Rules

- The file will be processed as part of the WOW End of Day processing.
- Family benefit records will be updated to reflect redemptions received.
- Obligations and Outlays will be updated to reflect redemptions received.
- Rebate information will be updated to reflect redemptions received.
- Errors will be logged for any records that cannot be processed.

5.7 Report WIC Benefits Purged File

The WIC Benefits Purged file provides a detailed file of benefits which are expunged from the EBT System. A benefit is purged (expunged) when the Benefit Purge job runs and a Benefit exists with an end date that is prior to the current date.

Since the WOW system has an identical process that runs nightly, this file is not required.