

FANIS

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FANIS Trainee Guide



Log on to FANIS - I

Log on to FANIS

Introduction

Objectives

Main Objective

After completing this module, the trainee will be able to:

- Access the FANIS application.

Supporting Objectives

Performance Objectives

After completing this module, the trainee will be able to:

1. Log on to the LAN.
2. Log off the LAN.
3. Log on to FANIS.
4. Log off FANIS.

Glossary

<i>User ID</i>	A unique identifier assigned to a FANIS user to authorize access to FANIS
<i>Password</i>	A user-defined value that protects the User ID from unauthorized use
<i>Windows desktop</i>	The screen from which all applications are accessed
<i>LAN</i>	Local Area Network
<i>Time out period</i>	The length of time FANIS allows a user ID to be idle before automatically logging the user out of FANIS.

Preview

The following topics are covered in this module:

- Logging on to the network.
- Logging on to FANIS.

Topics

Log In Procedure Overview

Two log in procedures

You must perform two log in procedures to access FANIS information:

- First: Log in to the LAN.
- Second: Log in to FAN.

Each log in procedure requires its own user ID and password.

Network User ID

The NETWORK User ID is:

- The first letter of your first name and the first five (5) letters of your last name. **NOTE:** If your last name is less than five (5) letters, numbers will be added to the User ID name.
 - Always lowercase.
-
-

**Network
password**

The NETWORK password is:

- At least seven (7) characters.
 - Assigned to you when you first log on.
-

FANIS User ID

The FANIS User ID is:

- The first letter of your first name and the first five (5) letters of your last name.

NOTE: Your FANIS User ID may be different than described if someone with the same last name and similar first name has previously been assigned a FANIS User ID. In this case, your FANIS User ID will have some unique identifier such as a digit on the end to make it unique.

**FANIS
passwords**

The FANIS password is:

- At least six (6) characters.
 - Always lowercase.
 - Assigned for you the first time you use it.
-

**Three tries only
into FANIS**

If you receive a message that indicates that your log in was not successful (example: "Login Failed"), check to see if the Caps Lock button is on.

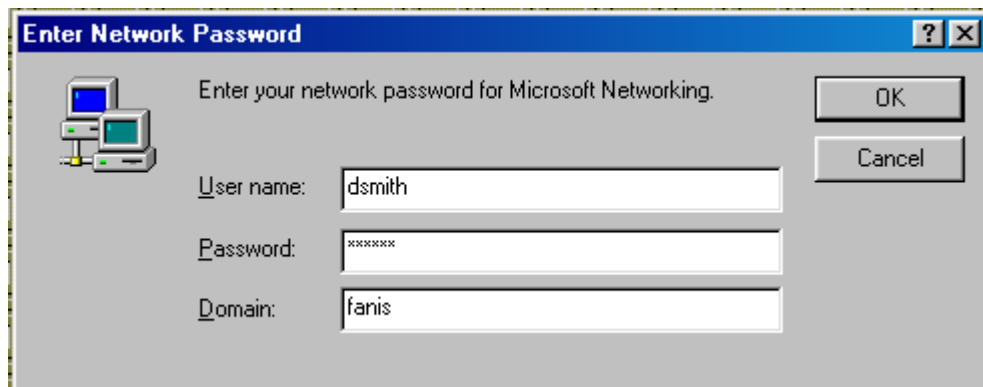
- If the light next to the "A" in the top right corner of the keyboard is lit, press the Caps Lock key to turn it off and log in again.
-

Log In To Windows

Network log in window

This window is the first window that opens when your laptop or desktop first turns on.

- The User name field is pre-filled with the user ID of the person who last logged in to the network on this PC.
- The Password will not display when you type it.
- The Domain is set by the technical support staff. Do not change it.



FANIS log in window

The FANIS log in window opens when you double click on the FANIS desktop icon.

FAN Login [Application Version :]

Database: fan

User ID: shirem

Password: ****

Login Cancel Change Password...

Agency

Fan Agency

Site Name

Fan - Test site

Fan site

Explorer Agency Setup

Application field	Always select FANIS to access FANIS information.
<hr/>	
Database Name	During training, select Training . After training, select FAN .
<hr/>	
User ID	The User name field is pre-filled with the user ID of the person who last logged in to the network on this PC.
<hr/>	
Password	The Password will not display when you type it.
<hr/>	

Common Log In Problems

Case sensitivity	This is the most frequent problem. If you receive the message “Login Failed” or another message indicating that you were unsuccessful, check to be sure that the Caps Lock is OFF.
<hr/>	
Forgotten password	If you forget your password, you must contact the State Help Desk to have it reset.
<hr/>	
No network connection	If the network cable comes out of the back of the desktop, you will lose your connection to the network. Make sure the cable fits securely.
<hr/>	

Automatic Time Out

Time out	<p>A user ID will be automatically logged out of FANIS if no action occurs on a window during a fifteen (15) minute time period. An action includes:</p> <ul style="list-style-type: none">• Moving the mouse.• Tabbing to another field.• Typing information in a field.• Selecting information from a list box.• Moving to a new tab.• Saving information.• Closing a window.
<hr/>	

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FANIS Trainee Guide



Pre-Screening and the Certification Process - II

Introduction

Objectives

Main Objective

After completing this module, the trainee will be able to:

- Begin the FAN certification process for an applicant.

Supporting Objectives

Knowledge Objectives

After completing this module, the trainee will be able to:

1. Define “pre-screening.”

Performance Objectives

After completing this module, the trainee will be able to:

1. Search for a participant or family member.
2. Evaluate automatic dual enrollment search results to decide whether to continue or stop pre-screening for an applicant.
3. Record basic demographic information for each member of the applicant’s family.
4. Record Residential Address information for a family.
5. Record Mailing Address information for a family.
6. Record estimated size and income of household.
7. Record any adjunctive services for each family member.

Glossary

<i>pre-screening</i>	The process of gathering basic information from an applicant during the initial visit at the FAN site.
<i>dual enrollment check</i>	The process of determining if an applicant is CURRENTLY ENROLLED in FAN or in the WIC program in the New York City area.
<i>family</i>	A group of related individuals.
<i>household</i>	<p>A group of related or non-related individuals who:</p> <ul style="list-style-type: none"> • are living together, • share income and resources, and • are interdependent as regards production of income and consumption of goods and services. • EXCEPTION: A foster care child is a household of one. <p>Eligibility is determined by household.</p>

Topics

Pre-Screening and the Certification Process

Purpose of pre-screening	<p>Pre-screening is done to:</p> <ul style="list-style-type: none"> • Record basic demographic and eligibility information for an applicant and family.
When to pre-screen	<p>Pre-screening is performed only for:</p> <ul style="list-style-type: none"> • NEW applicants of NEW families.
When not to pre-screen	<p>Do not pre-screen:</p> <ul style="list-style-type: none"> • Any participant or family member with an existing FANIS record. • New applicants to existing families (example: new infant in a family, this is done through the Household Composition screen). <p>Each time you pre-screen, FANIS creates a unique record for the person. If you pre-screen the same person twice, a duplicate record is created making it very difficult to know which is the correct one.</p>

Pre-screening information

Pre-screening information is basic demographic and eligibility information. This information is updated as necessary during the Certification process.

Pre-screening captures the following types of information:

- demographic information about each family member
- residential and mailing addresses for the family
- size and estimated income of the household
- adjunct program participation for each family member (At re-certification, this information can be reviewed and updated as needed)

FANIS ID

FANIS automatically assigns a unique number for each family member. This number becomes the participant's FANIS Participant ID at the time of enrollment.

Non- FAN participants in a family are also assigned FANIS ID's to identify them as members of a household.

The FANIS ID number displays in the header areas of the Certification and Food Issuance subsystem windows.

Prescreening overview

- The pre-screening procedure is a multi-step process. Some steps are performed by the user; others are performed automatically by FANIS.

Step	Task	Performed By
1	Perform a search on Explorer to determine if any family member has a FANIS ID number at any FAN site.	User
2	Record and save basic demographic information about the applicant and family.	User
3	Check for dual enrollment and Local Agency record.	FANIS
4	If a dual enrollment match is discovered, determine if match is the same person.	User

Search the Local Agency**Explorer**

Use Explorer to perform a search for all participants. This will determine if the applicant is active.

- Dual enrollment will check for currently enrolled participants in the WIC program and at other FAN agencies.

**Search by
Participant
Overview**

Perform a search of the participant's last name with the focus on Participant Overview in the Tree view.

- If the search displays the applicant's name, he/she has an existing FANIS ID.
- If the search does not display the applicant's name, he/she does not have an existing case. Perform the search for the remaining family members. If no one is found, you may pre-screen on the Applicant Pre-Screen window.

**Correct
Spelling of
Names is
Important**

When performing a search on any of the Explorer options, enter only the first few letters of the last name in the Last Name field. This will reduce spelling errors that would result in no matches when the person has a FANIS record.

Examples:

You are searching for Alexis Czyrkasian. Type ***czy*** in the Last Name field. FANIS will display all names that begin with ***czy*** in the search results area.

You are searching for Karen Andrezjewski. Type "***and***" in the Last Name field. FANIS will display all names that begin with ***and*** in the search results area.

Applicant Pre-screen window

Pre-screening is conducted on the Applicant Pre-Screen window. The left side of the window captures information for each individual family member:

- Family Members
- Member Data
- Residential Address

The right side of the window captures information for the entire household:

- Family Phone
- Mailing Address

CT005N - Applicant Pre- screen

Applicant Name	Category	DOB	Sex	Type	Family Head
		00/00/0000		FAN	

Member Data

Name:

Type: ☒ FAN ☐ NON-FAN

DOB: 00/00/0000 Sex: SSN: --

Category: Relationship to CT:

Ethnicity:

Family Phone

Phone Number: () - -

Phone Type:

Residential Address

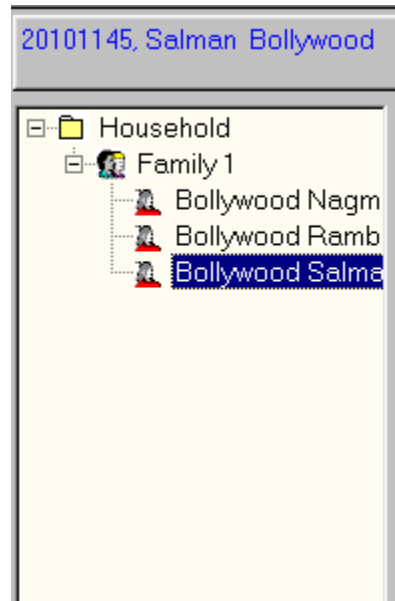
Mailing Address

☐ Same As Residence

One family at a time

Enter information on the Application Pre-Screening window for one family at a time.

If two families in the same household apply at the same time, complete the pre-screening process separately for each family.

**Family Member area**

The Family Member area displays a list of all members of an applicant's family that have been saved in FANIS.

Applicant Name Area

The Member Data area is used to record the following information for each member of the applicant's family:

- Name
- Whether the person is a FAN or Non FAN participant
- Date of birth
- Sex
- SSN
- FAN category
- Relationship to caretaker
- Ethnicity

Foster care child

A foster care child is pre-screened as a family of one in a household of

Name window

one.

Only the foster care child's name is included in the Applicant Name area. The Caretaker's name should be added as a Proxy.

Add button

Click the **Name...** button to access the common Name window to record family member's names.

Names appear in the Applicant Name area in the order in which they are entered.

Click the **Add** button to add each member of the family. It creates a blank line in the Applicant Name area and blanks out the Member Data fields.

Policy: It is important to enter **ALL** family member names including Non-FAN members of the Household. When entering a NON-FAN member of the family, make sure the NON-FAN radio button is checked.

Delete buttons

Click the **Delete** button to:

- Delete a member from the family before saving.
- Delete a blank line from the Family Members area.

You cannot delete a name using this method after you click the **Save** button.

Note: To delete a family member after "saving", for example; a husband leaves the family; use the retire button on the Household Composition Screen to delete this person.

FAN Type

FAN is the default selection (FANIS assumes that the person is a FAN applicant). Be sure to select the correct value for each person (e.g. FAN or Non-FAN). After the information is saved in FANIS:

- You are allowed to change a person from non-FAN to FAN.
 - You can change a person from FAN to non-FAN as long as they are **NOT** an active participant.
-

FAN Category	<p>FANIS category must match the date of birth information</p> <p>Example: FANIS will not allow you to select Infant if the child has already had his/her first birthday</p>
Residential Address area	<p>The Residential Address area is used to display the household's residential address.</p> <p>Click the Residence ... button in the Residential Address area to access the Address window and record the Residential Address.</p>
Mailing Address area	<p>The Mailing Address area is used to display the household's mailing address if it is different from the residential address.</p> <ul style="list-style-type: none"> • Click the Same as Residence check box if the household's residential and mailing addresses are the same. • Click the Mailing Address ... button in the Mailing Address area to access the Address window, if the Mailing Address is different than the Residential Address.
Family Phone	<p>The Family Phone area is used to record the family's phone number and phone type.</p>
Save button	<p>Click the Save button only when all information on the Applicant Pre-screen window has been typed and verified. When you click the Save button, FANIS:</p> <ul style="list-style-type: none"> • Checks for Dual Enrollment. • Assigns FANIS ID's for all names in the Family Members area. • Saves all the information.
Only one chance	<p>When the Applicant Pre-Screen window closes, it cannot be accessed again to add or change information for the participant(s) just entered. Any updates are completed on the Household Composition window as part of the continuing certification process.</p>

Automatic Search Functions

Two searches

When you click the Save button to save the pre-screening demographic information, FANIS performs two searches on each person in the Family Members area:

1. Search all FAN Local Agency records for a match.
 2. Search the WIC records for a match.
-

The screenshot shows a window titled 'FAN - [Explorer]' with a sub-header 'CT045N - Dual Enrollment'. The 'Search Parameters' section includes a 'Name' field with a dropdown set to 'like' and the text 'Bierwirth Sage', a 'Social Security Number' field with '\$\$ - -', and a 'Date Of Birth' field with '10/22/1996'. To the right are buttons for 'Find Now', 'Stop', and 'New Search'. The 'Result' section contains a table with the following data:

Certification	Name	DOB	SSN	Agency Name
FAN	Bierwirth Sage	10/22/1996	- -	Fan Agency

At the bottom of the window are buttons for 'Close', 'Cancel', and 'Help'. The status bar at the very bottom displays 'SHIREM' and the date/time '05/09/2001 03:58 pm'.

Results

If FANIS:

- Finds a match, it opens a window to allow you to review the information. You then determine if the match is the same person as the applicant.
- Does not find a match, it performs the dual enrollment search for the next person in the Family Members area. It does not display that no matches were found.
- FANIS repeats the searches for each FAN applicant in the Family Members area of the Applicant Pre-Screen window.

If no matches are found, FANIS continues the pre-screening process.

Applicant Pre-screen Window

FAN - [Explorer]

File Edit Operations Driver Window Help

CT005N - Applicant Pre- screen

Applicant Name	Category	DOB	Sex	Type	Family Head
Sage Bierwirth	Child	10/22/1996	Male	FAN	

Member Data

Sage Bierwirth

Type: ☒ FAN ☐ NON-FAN

DOB: 10/22/1996 Sex: Male SSN: - -

Category: Child Relationship to CT:

Ethnicity: White, Not Hispanic

Family Phone

Phone Number: ()- -

Phone Type:

Residential Address

546 State St Central Bridge, NY 12345

Mailing Address

☐ Same As Residence

SHIREM 04/19/2001 02:43 pm

Automatic Local Agency Search**Search criteria**

FANIS uses the following to find a match:

- Search 1: Applicant's name (first and last name) and Applicant's date of birth
- Search 2: Applicant's social security number (if entered on the Applicant Pre-Screen window)

NOTE: FANIS searches for all family members to prevent a duplicate record. If no matches are found the Start Driver button is enabled. This button brings the user to the next screen (Select Participant Screen).

Select Participant Screen

- To continue with the Certification process, click the select button in the Select Participant window. Click on the Start Driver button, this will bring you to the Household Composition Screen.

Participant ID	Name	Category	Select
20101344	Doris Eberle	Pregnant Woman	<input type="checkbox"/>

Interrupt Driver Show Driver Start Driver

SHIREM 04/30/2001 11:23 am

-NOTES-

FANIS Trainee Guide



Recording Household Composition - III

Introduction

Objectives

Main Objective

After completing this module, the trainee will be able to:

- record all pertinent personal and family information for an applicant and family as part of the FAN certification process on the Household Composition screen.

Glossary

<i>self</i>	The caretaker designation assigned to the member of the family who is the primary caretaker. Can be a FAN or non-FAN family member.
<i>caretaker</i>	<p>The person responsible for the care of the child participant who can certify a child/infant in his/her care.</p> <p>A person does not need to be a FAN participant to be a caretaker.</p>
<i>proxy</i>	Person authorized to receive food items on behalf of the participant.

Preview

This module covers the **Household Composition** component of the certification process in FANIS. It contains the following topics:

Topics

Accessing the Household Composition Screen

- There are two ways to access the Household Composition screen.
1. When certifying a new applicant, the driver will take the user to this screen; or
 2. When updating a family or individual information.
- Highlight Household Composition in the Explorer tree view. Search for a family member by name and click **Open Window**.

FANIS Windows for Household Composition

**Household
Composition
window**

Household composition information is recorded on the Household Composition window.

Personal tab

- contains basic demographic information from the Pre-Screening window and additional demographics for each member of the family

**Household tree
pane**



Pane on the left of the window displays a list of all members of a single household.

- Click on a name in this pane to view and enter detailed information about the highlighted person on the Personal tab.

IMPORTANT: Always check that the correct person is highlighted in the tree view before changing or adding personal information.

Tree icons

FANIS uses two icons in the tree view to identify the FAN status of each family member.

This icon:	indicates that the family member is:
	Is an active FAN participant
	A non-FAN family member.

Header

The header is the banner area at the top of the window that identifies basic information for the person highlighted in the Tree area.

- The FANIS ID number for each person in the family displays at the far left of the header.

Saving information

Information that is entered on the Household Composition window is automatically saved when you:

- click on another family member in the tree view.
 - close the window and click **Yes** in the dialog box.
 - click the Next Screen arrow.
-

Personal Tab of the Household Composition Window

The screenshot shows a software window titled "FAN - [CT010N - Household Composition]". The menu bar includes File, Edit, Operations, Driver, Window, and Help. The toolbar contains icons for Explorer, Favorites, Print, Exit, Intrap. Queue, Prior Screen, Next Screen, Add, Delete, Save, and Help. The main area displays "20101288, Sage Bierwirth DOB: 10/22/1996 — Child 4 Years : 5 Months : 27 Days." A tree view on the left shows "Household" > "Family 1" > "Bierwirth Deanna" > "Bierwirth Sage" (selected). The "Personal" tab is active, showing fields for Member Data (Name: Sage Bierwirth, Type: NON-FAN, DOB: 10/22/1996, Sex: Male, SSN: --, Category: Child, Relationship to CT: [dropdown], Ethnicity: White, Not Hispanic, Farmers Mkt Cpn: 00/00/0000), Residential Address (546 State Rd Central Bridge, NY 12345), Mailing Address (546 State Rd Central Bridge, NY 12345), and Family Phone ((452)-555-2465, Home). A "Retire..." button is at the top right. A status bar at the bottom right shows "SHIREM", "04/18/2001", and "09:36 am".

Personal tab

The Personal tab of the Household Composition window displays information for ONE HOUSEHOLD MEMBER at a time.

Use the Personal tab to do the following:

- display individual demographic information
- add/change demographic information

	<ul style="list-style-type: none"> • add a family member • record the death of a family member or the termination from the program with the Retire button • record notes on any family member when applicable • record Farmer Market coupon issuance dates for senior participants
Primary Caretaker	POLICY: Since a foster care child is the only member of a household, she/he is identified as “self.” In this case, a Caretaker must be designated as a Proxy.
Changing information	Changes to an existing FAN participant are not updated in the header until after enrollment.

Adding Family Members on the Personal Tab

Adding family members	<p>Family members are added to the family on the Personal tab of the Household Composition window.</p> <p>Both FAN and non-FAN members are added on this window.</p>
Add tool	Click the Add tool in the Tool bar at the top of the window to create a blank record to enter the additional family member.
Name button	Click the Name button to access the common Name window to enter the new family member’s name.
FAN vs. non-FAN	<p>Each new person defaults to FAN. BE VERY CAREFUL to select non-FAN for family members who are not FAN.</p> <p>You can change a person from non-FAN to FAN but you cannot change a person from FAN to non-FAN.</p> <p>Note: If you need to change a person from FAN to NON-FAN, click on the “retire” button and enter date. This will make the person inactive; if you need to add this person to the family, you will need to select the radio button to add as a NON-FAN family member.</p>
Dual enrollment check	FANIS performs an automatic dual enrollment check for each person added to the family.

**Farmer's
Market coupon**

Enter the date the coupon was issued to the **Senior** participant.

**Recording
Proxies**

Proxies are recorded on the Personal tab of the Household Composition window.

- User may record up to two people to receive food items on behalf of the participant.
- Food items will be issued only to proxies whose names have been entered on this list.

Recording

Notes - Readonly

Summary **Detail**

User Id: shirem Subsystem: Client Certification

Creation Date: 05/10/2001

Type: HC

Subject: Diet

Text: This participant should see the Nutritionist during her next food pick up. Tests have shown her to have a high cholesterol count.

Close Cancel Add Delete Save H

Notes**Notes Window**

Use the Notes window to record free-form information not otherwise captured in FANIS. Click Notes Button, click Detail tab and click the Add button, type in subject of note and then enter the narrative.

Example: See Nutritionist during next food pickup, regarding high

cholesterol.

FANIS Window for Recording Deceased Members or Removing Person from the Household

Retire Button

Click the **Retire...** button on the Personal tab of the Household Composition window to access this window.

The deceased member or terminated participant is removed from the Household Tree view.

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Maintain Adjunct Programs Window - IV

Maintain Adjunct Programs Window

Complete for all members of the household	Record adjunct program information for any member of the household who participates in an adjunct program.
View area	<p>The view area at the top of the window displays previously entered names of household members and the adjunct programs in which they participate.</p> <ul style="list-style-type: none">• This area is blank the first time you open the window.
Data entry area	Click the Add button to open the data entry area at the bottom of the window.
Required fields	Program name and either Program ID or SSN are Mandatory fields.
Verification method and date	<p>Verification Method and Date are Mandatory.</p> <p>Adjunct program participation must be verified again at subsequent certifications.</p>
Est. Household Income field	Use this field to record estimated income information for participants who are income eligible. This field is for informational purposes only and is not used to calculate income.

CT030N - Maintain Adjunct Programs

20101288, Sage Bierwirth DOB: 10/22/1996 — Child 4 Years : 5 Months : 25 Days.

Household

Family 1

Bierwirth Deanna

Bierwirth Sage

Adjunct Program	Program ID	Ver. Date	Ver Method
Free/Reduced Lunch	12368	04/03/2001	Head Start
Food Stamps	6754	04/12/2001	Conversion

Adjunct Program Details

Program : Free/Reduced Lunch

Program ID : 12368 Medicaid Sequence No : 67

SSN: - -

Verification Method : Head Start Verification Date : 04/03/2001

Est. Household Income: 2,300.00 (Annual)

Close Cancel Add Delete Save Help

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Maintain Income Window - V

Maintain Income Window

CT025N - Maintain Income

20101288, Sage Bierwirth DOB: 10/22/1996 — Child 4 Years : 5 Months : 27 Days.

Household

Family 1

Bierwirth Deanna

Bierwirth Sage

Income Source	Amount	Frequency	Ver. Date
Child Support	600.00	Bi-Weekly	04/16/2001

Source: Child Support

Employer:

Supervisor:

Employer Address...

Phone Number:

Amount: 600.00

Frequency: Bi-Weekly

Verification Method: Letter of Support Ver Date: 04/16/2001

Close Cancel Add Delete Save Help

20101371, Ralph King DOB: 12/25/1999 — Child 1 Year : 4 Months : 15 Days.

Household

- Family 1
 - King Ralph

Maintain Certification

Status	Category	Type	Sex	Cert Beg Dt	Cert Exp Dt
Pending	Child	FAN	Male	00/00/0000	00/00/0000

Subsequent Cert
Cate

Residential Address
1797 Tuilleries Aly Jamiaca, NY 11243

Proof of residence :

Address

Qualifying Income
Household Size: 1
Income below limit ☐

	Annual	Monthly
Income:	\$.00	\$.00
Threshold:	\$.00	\$.00

Adjunct Program ☐ Verification Date: 00/00/0000

Participant Overview
Edit Income
Edit Adjunct

SHIREM
05/10/200

Edit Income

During the Pre-Screening process you can access the Maintain Income window by clicking on the Edit Income button on the Maintain Certification screen.

OR

You can access the Maintain Income screen by highlighting Maintain Income on the Explorer.

Complete for all members	Complete this window for any member of the household who contributes income to the household.
Adjunctively eligible	Income information on this window for participants who are adjunctively eligible is optional.
View area	The view area at the top of the window displays previously entered income sources, amount, and frequency for the member highlighted in the Tree view. This area is blank the first time you open the window.
Data entry area	Click the Add button to open the data entry area at the bottom of the window.
Income source	You must complete the Amount and Frequency for each source of income.
Income from wages	When entering information about wages income, you must complete all fields on the Maintain Income window, including supervisor and Employer address.
Averaging pay	Perform the following steps on the Maintain Income window if you need to average a number of pay stub amounts: <ol style="list-style-type: none"> 1. Calculate the average amount for the total number of pay stubs. (FANIS does not calculate the average). 2. Type the average amount in the Amount field. 3. Select the unit of one pay stub in the Frequency field. (Examples: Select Weekly if you averaged four weekly pay stubs. Select Bi-Weekly if you averaged two two-week pay stubs).
Cumulative Year to Date	If a pay stub has a Year-to-Date (YTD) amount: <ol style="list-style-type: none"> 1. Type the YTD amount in the Amount field. 2. Select Cumulative YTD in the Frequency field. 3. Type the From and To dates to describe the time frame covered by the YTD amount.
Employer Address... button	Click this button to access the Address window to record the employer's address information.
Verification method and date	Verification Method and Date are Mandatory .

Participant Denial

**Income
ineligible**

FANIS will calculate income eligibility after you close the Edit Income window and compare the income amounts to the income thresholds. If the participant's income exceeds the income threshold limits, the participant is ineligible for FAN services, and there will be no "X" in the income below threshold box.

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FANIS Trainee Guide



Food Package Issuance - VI

Introduction

Objectives

Main Objective

After completing this module, the trainee will be able to:

- Authorize food packages in FANIS.

Supporting Objectives

Knowledge Objectives

After completing this module, the trainee will be able to:

1. Issue a Food Package appropriate to participant's category.
2. Edit a participant's Food Package.

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Performance Objectives

After completing this module, the trainee will be able to:

1. View the standard food package for an individual participant.
2. Preview food packages for an individual participant.
3. Substitute allowed food items in a participant's standard food package.
4. Change the quantity of a food item in a participant's food package.
5. Delete a food item from a participant's package.
6. Add a food item to a participant's food package.

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Topics

FANIS

Food Package Issuance and the Certification Driver

The Food Package Issuance window is the last window in the Certification Driver process.

Clicking on the Next window brings the User to the Enrollment Screen. If the Participant is eligible for Category, Residence, and Income then **click Save** on the top tool bar and then click the Next arrow.

Note: If the participant is ineligible for any reason the User must return to the Maintain Certification screen and review the participant's information.

The Next arrow will bring the User to the Food Package Issuance Screen.

Food Package Issuance Window

FAN - [FP020N - FP Issuance]

File Edit Operations Driver Window Help

Explorer Favorites Print Exit Intrap. Queue Prior Screen Next Screen Add Delete Save Help

20101288, Sage Bierwirth DOB: 10/22/1996 — Child 4 Years : 6 Months : 10 Days.

FP Issuance

Participant Name	Cert Status	DOB	Cert Begin Date	Cert End Date
Sage Bierwirth	Active	10/22/1996	04/01/2001	10/31/2001

Package
☒ Current
☐ Previous
☐ All

Issue Date	Category Name	Commodity Name	User Id	Link No	Quantity
------------	---------------	----------------	---------	---------	----------

Print Type
☐ Family ☒ Individual

Print Report Edit Package Issue Package

SHIREM 05/02/2001 09:21 am

Food Package Issuance Window

Food Packages are reviewed with the participant through the Food Package Issuance Window.

FP Issuance tab Highlighting a participant in the FP Issuance section will allow the user to view the food package issuance information for that participant's category.

FP Issuance fields

Participant Name	Name of participant
Cert Status	Current certification status.
DOB	Date of Birth
Cert Begin Date	Date certification began
Cert End Date	Date certification ended/will end
Issue Date	Date food package was issued
Category Name	Food category
Commodity Name	Identifies actual food item
User ID	Identifies the person who issued the food package.
Link NO	Number that separates food categories.
Quantity	Quantity of items issued in each category.
Control Buttons	Buttons located at the bottom of the screen, use them for Editing, Issuing, and Printing a participant's food package.
Radio Buttons	Buttons found on the side or the bottom of the FP Issuance screen.

Radio Buttons

Package Buttons	These buttons allow the User to view the Current, Previous, and All food packages for the highlighted participant.
Print Type Buttons	These buttons allow the User to choose the type of report they want to print, either Family or Individual.

Control Buttons

Print Report	Prints food package report for either a family or an individual participant.
Edit Package	Use this button for editing a participant's food package.
Issue Package	Use the Issue Package button in the Food Package Issuance window to issue standard packages.

FAN - IFP020N - FP Issuance

FP025N - Assign Package Items

20101288, Sage Bierwirth DOB: 10/22/1996 — Child 4 Years : 6 Months : 12 Days.

Category Name	Commodity Name	Link No	Quantity	Issue Cycle	Type
CEREAL	Cereal, Corn Flakes	1	2	Every Month	Total
CEREAL	Cereal, Oats	1	2	Every Month	Total
CEREAL	Farina	1	2	Every Month	Total
CEREAL	Cereal, Rice	1	2	Every Month	Total
CEREAL	Oats, Rolled	1	1	Every Month	Single
JUICE	Tomato Juice	2	5	Every Month	Total
JUICE	Grapefruit Juice	2	5	Every Month	Total

Issue Date	Category Name	Commodity Name	User Id	Link No	Quantity
05/04/2001	CEREAL	Cereal, Rice	shirem	1	1
05/04/2001	CEREAL	Cereal, Corn Flakes	shirem	1	1
05/04/2001	JUICE	Grapefruit Juice	shirem	2	3
05/04/2001	JUICE	Tomato Juice	shirem	2	2
05/04/2001	MEATS	Beef	shirem	3	1
05/04/2001	CHEESE	Cheese, 2 lb	shirem	4	1
05/04/2001	MILK	Milk, Non Fat Dry	shirem	5	1
05/04/2001	PROTEIN (LEGUMES)	Beans, Lt Red Kidney	shirem	6	1

SHIREM 05/04/2001 10:34 am

Food Packages

Issuing a Food Package

Use the Issue Package button in the Food Package Issuance window to issue standard packages.

Note: Under “type”

- **Single** – no other choices can be made within that food group.
 - **Multiple** – Choice in a food group that is either a single item or a combination of two items.
 - **Total** - Choice in a food group can be more than one up to the maximum amount allowed for that food group.
-

Issuance Actions

Choosing Items from the List

Highlight the specified food item by clicking on the food item. Then click the “**Add**” button and food name will appear on the bottom portion of the screen.

To make any changes to quantity, click on quantity box and enter new amount.

Note: If quantity box is gray, then no changes can be made. This is because it is a single issuance item.

Items that have been added can be deleted by highlighting the food item on the bottom half of the screen and clicking on **Delete**.

Note: Food packages can be edited on the day of issuance only.

Review food selection with the participant. Then click the **Close** button (which subtracts from inventory).

Complete food selection for each participant by highlighting the name first. This will bring up the Food Package Issuance screen.

Click Radio button for print type e.g. Family or Individual. This will display the participant’s shopping list. Have the participant sign using the

signature capture device.

Press print and the list will be printed. Make sure the attestation statement is read by participant or read to the participant by the certifier and confirm food choices with the participant.

Note: The signature capture device can be disabled when entering data from a mobile or senior distribution site. A reason for disabling the device must be entered when choosing this method.

Food Pick Up Only

Go to the Explorer tree view, click on the Food Package Issuance button. Enter FAN ID number or name and click Search.

Highlight the name of the participant and click “Open Window,” this will take you to the Food Package Issuance Screen.

Note: When issuing an infant package for a child participant, click on the Retrieve/Reset Infant Package button. This will display food packages for infant “B.” Follow instructions for issuing a food package.

If changes are needed, the food choices and quantities can be revised on this screen. The previous months issuance will show on the bottom half of the Assign Package Items Screen.

The screenshot shows the FANIS software interface. On the left is the Explorer tree view, and on the right is the Parameters form.

Explorer Tree View:

- systems
 - FAN
 - Client Certification
 - Applicant Pre- screen
 - Dual Enrollment
 - FAN Participant Overview
 - Household Composition
 - Maintain Adjunct Programs
 - Maintain Income
 - Driver
 - Initiate Driver
 - Food Package Items
 - FP Issuance**
 - FP Profile
 - Inventory Control
 - Commodity Entry Screen
 - Transaction Entry
 - View Transaction
 - Local Agency Management
 - Maintain Local Agency Information
 - Maintain Local Agency Management Staff
 - Maintain Local Agency Projected Costs
 - Maintain Local Agency Site Information
 - Maintain Local Agency Staff
 - Maintain Management Evaluation
 - Maintain State Staff Information
 - Reference Tables
 - Maintain Reference Tables

Parameters Form:

Parameters

☐ Add New ☒ Open Existing

Family ID: Household ID:

Participant ID: Certification ID:

Last Name:

First Name:

SSN: DOB:

Phone1: Phone2:

Name	DOB	SSN
Bierwirth, Sage	10/22/1996	--
Bierwirth, Sage	10/22/1996	--
Bollywood, Salman	04/01/2000	--

-NOTES-

FANIS Trainee Guide



Inventory Screens - VII

Inventory Screens

Introduction

Objectives

Main Objective

After completing this module, the trainee will be able to:

- View, add or update transaction information for a FAN Agency

Glossary

<i>Adjustments</i>	Any adjustments made to the inventory as a result of physical inventory count.
<i>Damages</i>	Indicated when disposing or donating damaged foods.
<i>Deliveries</i>	These are items that are received in the warehouse from either OGS or USDA
<i>Demonstrations</i>	Identifies food items used for demonstrations
<i>Transfer</i>	Food items transferred from one site to another.

Preview

This module covers the Transaction Entry Screen functions;

1. Adjustments
2. Damages
3. Delivery
4. Demonstrations
5. Participant, Participant-WIC, Participant-Sr.
6. Transfer

Topics

Transaction Entry Screen

For local agency use:

Adding a Transaction against a Commodity

- Highlight selected food from the top and click the “Add” button to add a transaction for that food.
- Click transaction type, e.g. adjustments, damages
- Click reason and enter reason
- Click quantity, enter quantity
- Click unit type, enter individual unit or case
- If adjusting for damages, click on fault and reason.
- If a Delivery is received enter order number (order number is OGS number or Disposition number from USDA forwarding notice).
- Transaction date and time defaults to today’s date. Transactions are automatically saved when you click on the add button again or click the save button. You may delete a transaction if you haven’t already saved.
- Local Agency inventory is calculated by the system.
- When an item falls below 100 units, the item will be highlighted in red.

IV010N - Transaction Entry

Category	Commodity Name	FCS Code	Unit Size	Unit	Unit Type	Current Quantity
INFANT FORMUL	Soy Infant Formula, Pwd	B162	14 Ounce	Can		1358
INFANT FORMUL	Infant Formula, Pwd	B158	14 Ounce	Can		1240
CEREAL	Cereal, Rice	B848	15 Ounce	Box		2399

Transaction Type	Reason	Trans. Date	Quantity	Unit Type	Fault	Order No	La Inv. After Txn(in Units)
Damage-Dist	Dented	05/04/2001 15:07:26		Case	Manufacturer		1358

Adjustmnt-Minus
Adjustmnt-Plus
Damage-Disposed
Damage-Donated
Delivery-OGS
Delivery-USDA
Demonstration

Add Delete Close Cancel Save Help

Transaction Types and Reason Codes

Adjustments – Plus and Minus

Adjustments can be made at any time. For example, if you're looking at the Transaction Entry Screen at the end of the day and see that you only have two cases of green beans left and you check and see you actually have three cases of green beans left, enter an "adjustment plus" of one case.

End of Month Physical Count Adjustments – Inventory Managers will run a report that shows the current quantity of all commodities at the site. They will conduct a physical count. Then they will enter on the Transaction Entry Screen the adjustments, using the transaction type “Adjustment plus” or “Adjustment minus” and use the reason code of “Physical Count”. Because the physical count and adjustments will be done on the 1st of the month, the adjustments will be reported for the month they are entered, not the previous month.

Damages (Disposed or Donated) – always a minus

Disposed – Foods damaged that must be thrown out should have the transaction type of “Damaged-Disposed” and choose the reason code that describes the damage (crushed, dented, package broken, other, etc.), and a fault code (OGS, Manufacturer, or Internal). Only enter a fault code if the party at fault is known. Any additional information may be entered on the Notes Section.

Donated – Foods damaged but can be donated to a food pantry or soup kitchen should have the transaction type of “Damaged-Donated: and choose the reason code that describes the damage (slightly rusted, taped/repacked, etc.) and a fault code (OGS, Manufacturer, or Internal). Only enter a fault code if the party at fault is known. The food pantry or soup kitchen receiving the donation should be entered in the Notes section of the Transaction Entry Screen.

Delivery (OGS or USDA) – always a plus

OGS – All items listed on the OGS delivery receipt must be counted and entered on the Transaction Entry screen using transaction type “Delivery – OGS”. The quantity can be entered in case amounts. Enter the OGS order number in the “Order Number” section.

USDA – All items must be counted and entered on the Transaction Entry screen using the transaction type “Delivery – USDA”. The quantity can be entered in case amounts. Enter the USDA Disposition Number in the “Order Number” section.

Demonstrations – always a minus

Food items used for food demonstrations must be entered using the transaction type “Demonstration”.

Participant, Participant-WIC, Participant-Sr. – always a minus

There are three reasons to use these transactions:

The system will automatically use the “Participant” transaction type as certifiers are entering shopping list data for participants. Items are subtracted from inventory when the certifier closes the food package issuance screen.

If for any reason, FANIS will not accept a food package for a participant (Child comes in during the month of their 6th birthday, but after the actual birthday, etc.) The inventory manager may use the “Participant – WIC” or “Participant – Sr.” transactions to record the distribution of the commodities.

Rain checks – In the event a site has run out of a commodity that there are no other choices for, (i.e. cheese), the site may issue a rain check. When the rain check is redeemed, the certifier must put a note on the participant’s record via the Recording Household Composition screen that the participant picked up the item and the date of the pick up. (Certifiers cannot edit the food package information after close of business on the day the person originally picked up their food package for the month). The Inventory Manager must enter the issuance of the item, using the “Participant – WIC” or “Participant- Sr.” transaction types, on the Transaction Entry Screen.

Transfer – plus and minus

The “Transfer” transaction types may be used when transferring foods between sites. The site giving the food will use the “Transfer minus” and the site receiving the food will use the “Transfer plus”. These amounts should be exactly the same. The site giving the food can enter the site they are giving the food to in the notes section. The site receiving the food can enter the site that gave them the food in the Notes section.

View Transaction Screen

The View Transaction Screen is for the Inventory Manager and the Central Office Staff to review transactions for any time period. This screen is READ ONLY, if transactions must be corrected or updated, the Inventory Manager must go to the Transaction Entry screen.

Site Name

Inventory Managers that have access to view the transactions at more than one site, will have a choice of sites to choose from. All others will choose their present site.

V015N - View Transaction

Site Name:

TXN Date: Fcs Code:

To Date:

TXN Type: Category:

Category	Commodity Name	FCS Code	Trans. Date	Transaction	Qty	Unit Type	Reason	Fault	Order N
INFANT FORMULA	Infant Formula, Pwd	B158	05/04/2001	Transfer-Plu	40	Can			
CEREAL	Farina	B160	05/04/2001	Adjustmnt-M	50	Case	Other	Internal	151321
CEREAL	Cereal, Oats	B861	05/03/2001	Participant	2	Box			
CEREAL	Cereal, Corn Flakes	B878	05/03/2001	Participant	2	Box			
CEREAL	Cereal, Corn Flakes	B878	05/03/2001	Participant	2	Box			
JUICE	Grapefruit Juice	A280	05/03/2001	Participant	5	Can			
JUICE	Tomato Juice	A290	05/03/2001	Participant	5	Can			
JUICE	Tomato Juice	A290	05/03/2001	Participant	5	Can			

Items for the Search

The user can search the database by a single transaction date or a date range, the type of the transaction, the food group, the individual food item, or any combination of these. Choose food items for the search and click the Search Button. For example, the Inventory Manager needs to know how much Orange Juice was delivered from OGS during the month of March. They would put in the date range of March 1 – March 31, choose the transaction type Delivery – OGS, and choose FCS Code A300 Orange Juice. The View Transaction screen will list all deliveries of orange juice during that time period.

Note: The Inventory Manager must run a report to receive total amounts for a month period. For example if the Inventory Manager needs to know the total amount of Orange Juice distributed to participants for the month of March, a report can be run of total distribution of commodities.

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