Formula Issued – Local Agency Breakdown & State Summary

FOOD & FORMULA (11.24.20)

Report Overview

This report replaces, and combines, the *Formula Issued – Local Agency Breakdown* and *Formula Issued – State Summary* reports that were run at the same time End-of-Month was run and that were previously posted in the AGENCY EOM >> [Year] >> [Year Month] >> Minnesota Reports folder.

It provides a list of formulas issued by each agency, as well as statewide, and the number of participants who were issued each formula. An OPTIONAL input control allows the output in the Agency tab to be filtered by Agency ID.

Some Uses Include:

- Comparison of State and Local Agency totals for issuance of formula.

- Obtain count of participants receiving a specific type of formula or formulas.

- Identify which agencies are issued a specific type of formula.

Notes

- Counts will be close but will NOT exactly match reports posted to the AGENCY EOM folder. These counts are not static. They are based on benefit issuance and **not** the end-of-month caseload count. Although the report may have seemed static when posted to the AGENCY EOM; it was only because they were run only once around the 15th of the each month.

- Counts are not unduplicated.

  - If a participant was issued formula by more than one agency for the specified participation month, the participant is counted once for each agency.

  - If a participant was issued more than one kind of formula, the participant is counted once for each kind of formula issued.

- The Agency is based on where the benefits were issued.

- This report uses **Report Input controls** to allow the report user to specify Agency IDs and filter the output in Tab 1 – Agency. (An Input Controls training module is available on the Infoview Training Modules page of the MDH WIC Website.)

- ▪ After entering PROMPT information and running the report, click the Input Controls icon.

- ▪ The default input control is to run the report for all agencies.

- ▪ Remove the checkmark from the Select All checkbox and select one or more Agency IDs to filter the report output in Tab 1 – Agency ID.

▪ The report output has been formatted to export to an 8.5 x 11 Portrait PDF. It can also be exported to Excel (NOTE: the margins will need to be adjusted and the headers/footers may not display).

Images of Report Outputs

Tab 1 – Agency

Agency ID	Participation Month	Distribution Item ID	Formula Description	Number of Participants
011	202010	146	can(s) 12.4 oz. powder Similac Advance	15
011	202010	162	can(s) 13.1 oz. powder Similac Neosure	1
011	202010	244	can(s) 12.0 or 12.5 oz powder Similac Sensitive	10
011	202010	298	can(s) 12.0 or 12.6 oz powder Similac Total Comfort	4
011	202010	299	can(s) 12.0 or 12.5 oz powder Similac Spit Up	2

Tab 2 – State

Participation Month	Distribution Item ID	Formula Description	Number of Participants
202010	121	container(s) 8 oz RTU Boost Breeze	3
202010	131	six pack(s) 8 oz. RTF PediaSure Grow&Gain (any flavor)	259
202010	132	six pack(s) 8 oz. RTF PediaSure Grow&Gain w/Fiber	47
202010	133	container(s) 8 oz. RTF PediaSure Enteral 1.0 Cal	24
202010	134	container(s) 8 oz. RTF PediaSure Enteral w/Fiber 1.0	18

Prompts

TABLE	FIELD	OPERATOR	VALUE	PROMPT & DEFINITIONS
FOODINSTRUMENTSET	Participationdate	Equal to	YYYYMM	**Enter PPTN Mo – YYYYMM:** The participant month during which benefits for formula were issued.

Input Controls

Report Tabs Affected by Input Controls: Tab 1 - Agency

Definition: Agency where participants were issued formula.

Type: Multi-select checkboxes

Values: Agency ID

Static Criteria

Agency Query

dbo.FOODINSTRUMENT.VOIDEDDATE Is Null

Explanation: Exclude if benefits were voided

dbo.FOODINSTRUMENTSET.COMPLIANCEBUY = 'N'

Explanation: Exclude if issued for Compliance Buy

dbo.FOODDISTRIBUTIONITEM.BASEFOODCATEGORYID = 'A'

Explanation: Include only formula

State Query

dbo.FOODINSTRUMENT.VOIDEDDATE Is Null

Explanation: Exclude if benefits were voided

dbo.FOODINSTRUMENTSET.COMPLIANCEBUY = 'N'

Explanation: Exclude if issued for Compliance Buy

dbo.FOODDISTRIBUTIONITEM.BASEFOODCATEGORYID = 'A'

Explanation: Include only formula

Report Output Definitions

Tab 1 – Agency

Columns

Column Name	Table	Field	Notes
Agency ID	FOODINSTRUMENTSET	Agencyid	NA
Participation Month	FOODINSTRUMENTSET	Participationdate	NA
Distribution Item ID	FOODINSTRUMENTITEM	Distributionitemid	NA
Formula Name	FOODDISTRIBUTIONITEM	Description	NA
Number of Participants	FOODINSTRUMENTSET	Statewicid	See Formulas

Sorted by
- Agency ID - Ascending
- Distribution Item ID - Ascending

Counts
- State WIC ID (See Formulas)

Tab 2 – State

Columns

Column Name	Table	Field	Notes
Participation Month	FOODINSTRUMENTSET	Participationdate	NA
Distribution Item ID	FOODINSTRUMENTITEM	Distributionitemid	NA
Formula Name	FOODDISTRIBUTIONITEM	Description	NA
Number of Participants	FOODINSTRUMENTSET	Statewicid	See Formulas

Sorted by
- Distribution Item ID - Ascending

Counts
- State WIC ID (See Formulas)

Technical Notes

- The SQL for the Agency and State Queries was provided by MN-661. The only change made was instead of using the FOODITEM.Basefoodcategory, the FOODDISTRIBUTIONITEM. Basefoodcategory was used since it simplified the query and did not change the resulting output.

Formulas

Tab 1 – Agency

Report Dates (report header)
="Participation Month: " + FormatDate(ToDate(UserResponse("Enter PPTN Mo - YYYYMM:");"yyyyMM");"MMM yyyy")

Run Date (report header)
="Run Date: " + CurrentDate()

Page # (page footer)
="Page " + Page()+" of "+NumberOfPages()

Number of Participants

=Count([Agency].[Statewicid])

Tab 2 – State

Report Dates (report header)

="Participation Month: " + FormatDate(ToDate(UserResponse("Enter PPTN Mo - YYYYMM:");"yyyyMM");"MMM yyyy")

Run Date (report header)

="Run Date: " + CurrentDate()

Page # (page footer)

="Page " + Page()+" of "+NumberOfPages()

Number of Participants

=Count([State].[Statewicid])

SQL

(changes are highlighted)

Agency Query

Obtain list and count of formulas issued by local agenies

```
SELECT
  dbo.FOODINSTRUMENTSET.AGENCYID,  dbo.FOODINSTRUMENTSET.PARTICIPATIONDATE,
  dbo.FOODINSTRUMENTITEM.DISTRIBUTIONITEMID,  dbo.FOODDISTRIBUTIONITEM.DESCRIPTION,
  dbo.FOODINSTRUMENTSET.STATEWICID
FROM
dbo.FOODINSTRUMENTSET INNER JOIN dbo.FOODINSTRUMENT ON
(dbo.FOODINSTRUMENT.FOODINSTRUMENTSETID=dbo.FOODINSTRUMENTSET.FOODINSTRUMENTSETID)
INNER JOIN dbo.FOODINSTRUMENTITEM ON
(dbo.FOODINSTRUMENT.FOODINSTRUMENTID=dbo.FOODINSTRUMENTITEM.FOODINSTRUMENTID)
INNER JOIN dbo.FOODDISTRIBUTIONITEM ON
(dbo.FOODDISTRIBUTIONITEM.Distributionitemid=dbo.FOODINSTRUMENTITEM.Distributionitemid)
 WHERE
 (
  dbo.FOODINSTRUMENTSET.PARTICIPATIONDATE  =  @prompt('Enter PPTN Mo - YYYYMM:','A','Dbo
Foodinstrumentset\Participationdate',Mono,Free,Persistent,,User:0)
  AND
  dbo.FOODINSTRUMENT.VOIDEDDATE  Is Null
  AND
  dbo.FOODINSTRUMENTSET.COMPLIANCEBUY  =  'N'
  AND
  dbo.FOODDISTRIBUTIONITEM.BASEFOODCATEGORYID  =  'A'
 )
```

State Query

Obtain list and count of formulas issued statewide

```
SELECT
  dbo.FOODINSTRUMENTSET.PARTICIPATIONDATE,  dbo.FOODINSTRUMENTITEM.DISTRIBUTIONITEMID,
  dbo.FOODDISTRIBUTIONITEM.DESCRIPTION,  dbo.FOODINSTRUMENTSET.STATEWICID
FROM
dbo.FOODINSTRUMENTSET INNER JOIN dbo.FOODINSTRUMENT ON
(dbo.FOODINSTRUMENT.FOODINSTRUMENTSETID=dbo.FOODINSTRUMENTSET.FOODINSTRUMENTSETID)
INNER JOIN dbo.FOODINSTRUMENTITEM ON
(dbo.FOODINSTRUMENT.FOODINSTRUMENTID=dbo.FOODINSTRUMENTITEM.FOODINSTRUMENTID)
INNER JOIN dbo.FOODDISTRIBUTIONITEM ON
(dbo.FOODDISTRIBUTIONITEM.Distributionitemid=dbo.FOODINSTRUMENTITEM.Distributionitemid)
WHERE
 (
  dbo.FOODINSTRUMENTSET.PARTICIPATIONDATE  =  @prompt('Enter PPTN Mo - YYYYMM:','A','Dbo
Foodinstrumentset\Participationdate',Mono,Free,Persistent,,User:0)
  AND
  dbo.FOODINSTRUMENT.VOIDEDDATE  Is Null
  AND
  dbo.FOODINSTRUMENTSET.COMPLIANCEBUY  =  'N'
  AND
  dbo.FOODDISTRIBUTIONITEM.BASEFOODCATEGORYID  =  'A'
 )
```

Colors

- Dark Blue – 003865

- Light Blue – CCD7E0

- Border Gray – D9D9D6

Revisions

11.24.20 – requested by State Office to replace *Formula Issued – Local Agency Breakdown* and *Formula Issued – State Summary* reports previously run by the Maintenance & Operations contractor every month at the same time as the EOM process since EOM reports will no longer be included after Release 2.40 (or in WINNIE).

References – Complete Listing of Hyperlinks

Infoview Training Modules
(https://www.health.state.mn.us/people/wic/localagency/infosystem/hubert/training/infoview/index.html#input)

Minnesota Department of Health - WIC Program, 85 E 7th Place, PO BOX 64882, ST PAUL MN 55164-0882; 651-201-4444, health.wic@state.mn.us, www.health.state.mn.us; to obtain this information in a different format, call: 651-201-4444