



MealService

User Reference Guide

Version 3.5.9.6555
Revised March 4, 2005

Important Note

Every effort has been made to incorporate accurate information regarding the MealService software. However, periodic revisions of the software may result in some features not performing exactly as documented in your installed version of MealService. We apologize for any inconvenience.

Copyright © 2004-2005 by Philip Frank, All rights reserved.

This page intentionally blank.

Table of Contents

Introduction	7
About this Guide	7
Conventions used in this Guide	7
What you Need to Run MealService	7
Installing MealService	7
Starting MealService	8
Becoming Familiar with MealService and Windows	8
 Part 1: Setting Up MealService	 11
 Chapter 1: Making Preliminary Settings	 11
The basic logic behind how MealService functions	11
Using the Database Administrator (dbAdmin.exe)	12
Setting Up Users and Assigning Access Levels	13
Setting Up the Organization Address and other basic Configuration elements	14
Configurable Screen Elements	16
Client Name and Address	16
Client Services tab	16
Biographic Info tab	17
Relationships	18
Service/Diet tab	20
Delivery/Route Info tab	21
Address Overrides	21
User-Defined Reports Menu	22
Assigning User-Defined Reports to the report selection dialogues	22
Auto-executing Queries	22
 Chapter 2: Entering Data into the Supporting Tables	 23
Screen 1: Conditions for Certification	23
Screen 2: Client Documents	24
Screen 3: Cold Bag Codes	24
Screen 4: Cold Bag Usage	24
Screen 5: Cuisines	26
Screen 6: Diet Modifications	26
Screen 7: Diseases	26
Screen 8: Event Types	27
Screen 9: Funding Sources	27
Screen 10: Locations/Distribution Centers	28
Screen 11: Marital Status	28
Screen 12: Meal Items	29
Screen 13: Race Codes	30
Screen 14: Routes	30
Screen 15: Services	31
Screen 16: Staff Members	32
Screen 17: Stop Reasons	32
Screen 18: ZIP Codes	32
Screen 19: Application Intake Documents	33
Screen 20: Application Intake Conditions	34
Screen 21: Meal Composition / Default Delivery Items	35
Screen 22: Configuration Screen (System Defaults)	36

Special Instructions for Mapping URLs.....	37
Maintaining System SQL Queries.....	38
Set Assessment Data: Order and Visibility	42

Part 2: Using MealService47

Chapter 3: The Client Information Screen 47

Client Status and Name And Address Information	47
Client Services tab.....	50
Biographic Info tab.....	52
Status/Dates tab	53
Record Missed Delivery	54
Excuse	55
Delete	56
Relationships tab	56
Client-Specific Relationships.....	57
All Individuals.....	61
Service/Diet tab	63
Set Custom Delivery Items	64
Funding/Billing tab	67
Funding	67
Pledges	69
Delivery/Route tab	71
Ongoing Deliveries	71
Address Overrides.....	72
Scheduled Deliveries.....	73
Episodic Deliveries	76
Service Suspensions tab	78
Health/Nutrition tab.....	79
Health History	79
Client Diseases.....	81
Health/Nutrition Assessments.....	81
Counseling Events.....	81
Map tab.....	83

Chapter 4: Client-Related functionality 85

Buttons at the bottom of the Client screen	85
Browse Button.....	85
Status Filter	85
Custom Filter.....	86
Add Client.....	88
Menu choices.....	88
Print Screen	88
Print Delivery Directions	88
Print All on this Client	88
Print Health/Nutrition History.....	89
Client Notes.....	89
Client Pop-Ups.....	91
View System History	92
Contact Summary.....	93
Context Menus	93

Chapter 5: Client Management Activities..... 95

How to Search and Navigate Client Records	95
Activating a New Client on a Delivery Service	97
Using the Activation Wizard	97
Managing Households and Household Members	102
Searching, Creating and Managing Households	103
Managing Household Members	105
Household Member Delivery Details Management	107
Migrating Delivery Details	107
Migrating Suspensions	109
Migrating Alternate Addresses	110
Tutorial: Creating a Household and Adding Members (the hard way)	110
Using the Household Wizard	111
Creating a batch of Scheduled or Episodic deliveries	114
How to Create a Delivery Report	116
Crediting Scheduled and Episodic Deliveries and Other Events, After the Fact	119
Managing Special Meals	122
Situations where additional food is delivered on an exceptional basis (i.e., Blizzard Bags)	125
How to Determine if a Client will receive a delivery for a selected date	127
How to Determine if a Client received a delivery for a past date	127
Recording a delivery as Comped	128
Deleting a Name from the database	130
Creating and Managing Alerts and Follow-Ups	130
Creating a Filtered Mail-Merge File	134
Creating a Custom Mail-Merge File	135
Creating Mail-Merge Client Invoices	147
Chapter 6: Analyzing and Printing Information	139
Delivery Reports	139
Counseling Reports	143
Alerts/Follow-Up Reports	144
Agency Reports	145
Other Reports	146
Intelligent Browse	152
Report Designer	156
Charts	159
Chapter 7: Utilities	163
Verify Delivery Conditions	163
Record Missed Deliveries	163
Order Stops by Route	165
Update Stopped Status	168
Inactivating Stopped Clients	169
Deleting Deliveries	170
Summarizing Missed Deliveries	171
Reset First Contact Date	172
Archiving Records	172
Execute Query	174
Deleting/Rearranging Diet Codes	175
Automatically generating a Unique Record Number	177
Mapping with MapPoint and Streets & Trips/AutoRoute	178
Configuring Auto-executing Queries	183
Consolidate Duplicates	184
Chapter 8: The Menu Structure and Speed Keys	187

Chapter 9: External Utilities.....	191
Database Administrator (dbAdmin.exe).....	191
Database System Utility (DBSys.exe).....	193
Restructure (modify the structure or indexes of) a table	193
Repairing a table.....	196
CodeSite	197

Part 3: Managing the MealService Infrastructure.....	199
---	------------

Installation and Configuration	199
MealService with Plug-In Support	199
MealService without Plug-In Support	199
Installation Issues common to both versions	199
Configuring the DBISAM Client-Server Engine.....	199
Backing up the data	203
Networking MealService (sharing one copy of the data among multiple computers).....	203
Moving the Data Files to a New Location.....	204
Repairing a table.....	205
Executable Files	207
Avery Labels used by Delivery Reports.....	207
Plug-Ins	207
Data Dictionary	208
Drop-Down List code translations.....	209
File Extensions created by MealService.....	212
Minimum System Requirements	213
Sample Reports and Output.....	215

Contact Information	217
----------------------------------	------------

Index	219
--------------------	------------

Introduction

About this Guide

This guide is designed to help you find what you are looking for quickly and easily. Each of the parts of the manual presents the associated tasks and information in a logical manner.

Conventions used in this Guide

This font identifies a screen label, program component or menu selection

This font indicates something that you type

This font is used for emphasis

This font is used for file names, literal prompts in a dialogue, and when a new term is introduced.

The | character is used to indicate linked menu choices. For example, **File | Exit** indicates that you should select **File** from the menu, and then select **Exit** from the resulting sub-menu.

NOTE: is used to bring important points to your attention.

➤**TIP**➤ is used to bring a useful function or time-saving feature to your attention.

⚠ Indicates a situation that could result in a loss of data.

What you Need to Run MealService

MealService requires a standard Windows PC hardware/operating system, including the following:

- Pentium processor or better
- 128 MB RAM minimum
- Windows 95 or later
- Hard Disk Drive with a minimum of 20 MB of available space to support the executable files. Additional space would be required for the storage of data.
- VGA Display with a minimum resolution of 600 x 800.

See Also

Minimum System Requirements, page 213

Installing MealService

These instructions are for installing the File-Sharing version of MealService.

- Insert the CD into your CD-ROM drive. The install routine should start automatically. If it doesn't, navigate to the X:\ drive (where 'X' stands for your CD-ROM drive letter) and double-click on *Setup* or *Setup.exe*. You may accept all of the defaults as to location of the executable file and the data, or change them as you see fit.
- When the install finishes, you must install the ZIP code data for the states of your choice. Launch the ZIP code utility by navigating to X:\ZIP Codes (where 'X' stands for your CD-ROM drive letter) and double-clicking on *CopyZIPs.exe*. Once the utility has launched, select those states that encompass your agency's service area. (If your state is not listed, you will need to contact us and we will email the files to you.) Once you've selected all of the states, click the **Copy ZIPs** button to transfer the data to your local drive. You can then exit the ZIP utility.
- Once the installation finishes you should have a MealService group on your Windows **Start** menu, as well as a MealService shortcut on your desktop.
- Before running MealService you should first check that the Database Setting is set to the correct directory. Do this by launching the *Database Administrator* program from within the **Programs | MealService** group on the **Start** Menu. The *Database Administrator* has an entry labeled **Database Location**. The directory containing the data you want to use should be listed in that edit field. If the directory listed does not reflect the actual location of the data, then click on the ellipsis (...) button to the right of the existing data directory. In the resulting **Locate MealService Data folder** dialogue, navigate to the appropriate directory (that is, the directory where you installed the data). If you accepted the installation defaults the database directory should point to *Program Files\MealService\Sample Data*

- Click **OK** to confirm your choice. You may now exit the *Database Administrator* by clicking the **OK** button.

The next step would be to launch the *User Maintenance* program to add yourself and/or others as users. The final step would be to populate the supporting tables appropriately.

See Also

Installation and Configuration, Page 199
 Configuring the DBISAM Client-Server Engine, Page 199
 Using the Database Administrator (dbAdmin.exe), Page 12
 Setting Up Users and Assigning Access Levels, Page 13
 Entering Data into the Supporting Tables, Page 23

Starting MealService

Once installed on your system, MealService is easy to start. There are two shortcuts created by the installation routine: one on your desktop and one on your Windows Start menu. The shortcut on the desktop has a blue icon with an image of a chef's face. The shortcut will be found on the Windows **Start** menu in the **Programs | MealService** group.

To start MealService without using a shortcut, using *Windows Explorer* or *My Computer* look for the program (executable) file named *MSvc.exe* and double-click it. (The program file's icon is blue, with an image of a chef's face.) If installed locally using the installation defaults, the program file will be found in the folder *C:\Program Files\MealService*

Becoming Familiar with MealService and Windows

Navigating in MealService is very similar to other Windows programs.

There are two types of menus in MealService:

- Pull-Down choices on the Menu Bar
- Context Menus

The Pull-Down menu bar appears at the top of the main screen. It provides access to most of the functionality of MealService. You will notice on the menus that there are keyboard equivalents for many menu choices.

≡**TIP**≡ If you use a menu choice frequently, make a note of the keyboard equivalent... it will save you much clicking. In the example illustrated here, **Control+N** will display the **Edit Notes** dialogue the same way selecting it from the menu would:

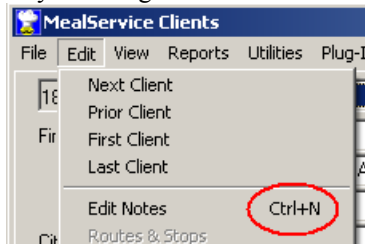


Illustration 1: Menu Shortcut

In addition to the functionality available through the main pull-down menu, there are some functions that are only accessible from a *Context Menu*. A Context Menu is displayed by using your mouse and right-clicking on a screen. You will notice that Context Menus change from screen to screen, displaying only the menu choices relevant for the selected screen. The context menu for the **Set Custom Delivery Items** screen is illustrated below:

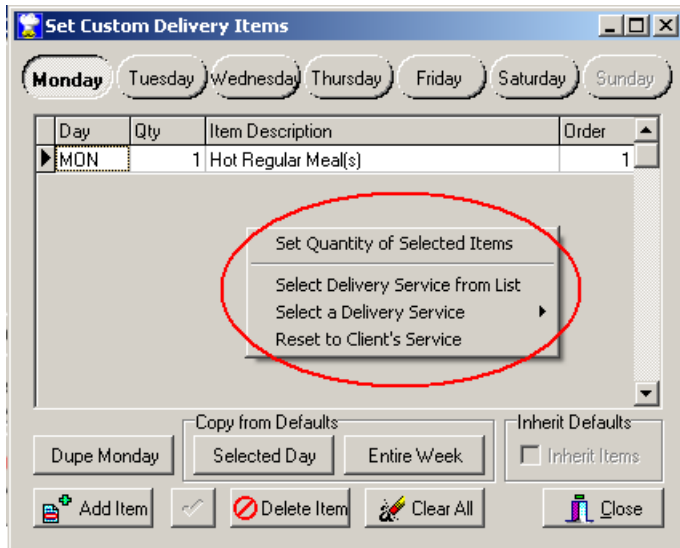


Illustration 2: A Context Menu

In addition to the keyboard equivalents of many menu choices, there are also keyboard equivalents for many of the buttons on screen. Any button label with an underscore can be accessed by using the speed-key equivalent. A button's speed-key equivalent is triggered by holding down the Alt key and simultaneously pressing the letter that is underscored. For example, in this illustration:



Illustration 3: Example of Speed Keys on Buttons

holding down the Alt key and simultaneously pressing the O key (**Alt+O**) is the equivalent of clicking the **OK** button and **Alt+C** is the equivalent of clicking **Cancel**. Another example: since the tabs on the Client screen are numbered, and the numbers are underscored, pressing **Alt+1** will take you to the first tab on the Clients screen, **Alt+2** will take you to the second tab, and so on. There are also keyboard shortcuts that aren't visible. For example, **Alt+N** (for Next) can be used to move forward in the Client database one record (the same as clicking the Next button), **Alt+P** (for Prior) will move you backwards in the database one record, and **Control+S** (for Search) will immediately jump your cursor to the Search entry field.

Many of the MealService dialogues use checkboxes (☑). To enter a checkmark (or tick, in the United Kingdom), click on the box using the mouse. To remove the checkmark, click the box again. Using the keyboard, a checkbox, when selected, can be alternately checked or unchecked by tapping the space bar.

A checkbox can have one of three states: *checked*, *unchecked*, or *unknown*. Not all checkboxes allow an unknown state, but for those that do an unknown state is indicated by a grayed checkmark: ☐

Record navigation throughout the MealService system is accomplished with a set of VCR buttons. These buttons resemble the buttons on a VCR, and serve similar functions.

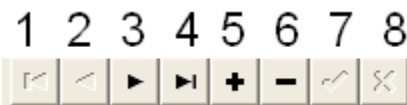


Illustration 4: VCR Navigation Buttons

In Illustration 4, the function of each of the numbered VCR buttons is as follows:

1. Go to first record
2. Go back one record
3. Go forward one record
4. Go to last record

5. Add a new record
6. Delete the current record
7. Save any changes
8. Discard any changes

Buttons throughout the system become enabled or disabled, as appropriate, and not all of them may be visible at all times. For example, if you are on the very first record the **Go to first record** button will be disabled. The '✕' (Discard Any Changes) button is only enabled when you have edited a record and while you remain on that record. Navigating to another record will automatically save your changes, thereby disabling the Discard Changes button.

While illustrated here, there are two buttons that do not appear in the main Clients screen. Those buttons are '+' and '-'. Clicking the '+' will add a new record and clicking the '-' will delete the current record. You will always be prompted to confirm any deletions. Once the deletion is confirmed, however, it is irreversible.

See Also

The Menu Structure, Page 187

Speed Keys, Page 189

How to Search and Navigate Client Records, Page 95

Part 1: Setting Up MealService

Chapter 1

Making Preliminary Settings

We will start by explaining the *Why* (The basic logic behind how MealService functions), as opposed to the *What*, *Where* and *How* (such as populating tables and other steps, which will be explained in the following sections).

MealService relies on *Defaults* to handle most situations. A Default is the condition or setting that applies to the majority of Clients for a given situation. In every case a Default can be overridden. But, the first step is to make certain that the defaults have been properly defined. The defaults apply to many aspects of MealService:

- The *Default Service* is the service to which most new Clients are assigned. Each newly created Client will be assigned to that service automatically. A Client's service can be easily changed at any time. But if the Client is to be assigned to the Default Service then nothing need be done. See "Select the default Service" on Page 40, for more information.
- Every service can have a *Default Funding Source* identified. That Default is what will be logged as the Funding Source for each Client on that service receiving a deliverable (i.e., receiving a delivery, having a counseling session, etc.), unless it is overridden. You have full flexibility to modify the funding source for each and every service a Client receives. But if the Client is receiving services funded in the same manner as most other recipients of that service, then no action need be taken. See "Default Funding" in the section on "Screen 15: Services", Page 31, for information on where this is defined.
- The delivery frequency indicates the kind of delivery schedule for a service: whether the delivery is week after week (referred to by MealService as *Ongoing*) or intermittent, such as the first Monday of every month (called *Episodic*). A step in creating a Service is defining the *Default Frequency*. The Default Frequency is then the frequency a Client will be assigned when newly added to a service. Here again, if a Client is to receive a different delivery frequency it can easily be changed. But if the Client is to receive the normal frequency for his or her service, then nothing need be done. See "Default Frequency", in the section on "Screen 15: Services", Page 31, for information on assigning the Delivery Frequency.
- In addition to the frequency, you can also define the *Default Delivery Type* for each service. The Delivery Type indicates the method of delivery: whether a delivered meal or a walk-in. As with the funding and frequency, a new Client will inherit the Default Delivery Type for his or her service. It, of course, can be changed as needed. See "Delivery Type", in the section on "Screen 15: Services", Page 31, for information on assigning the Delivery Type.
- Services that offer Ongoing deliveries (i.e., week after week) can have *Default Delivery Days* assigned. The Default Delivery Days for a service are the days of the week that deliveries are available. A newly added Client will have the default delivery days automatically marked for delivery. If the Client is to receive a delivery on all of the normal delivery days, then no action need be taken, but the days can be changed as needed. See "Default Delivery Days" in the section on "Screen 15: Services", Page 31.
- The *Default Delivery Items* for a service are what will be delivered to a Client, unless those defaults have been modified (or overridden) at the Client level. The default items for a service might best be viewed as a template. That template can be adjusted, as necessary, for any Client and for any day. But if the Client is to receive the standard items, then nothing need be done. Information on creating the default items for a service is "Screen 21: Meal Composition / Default Delivery Items", on page 35.
- If customized delivery items have been defined for a Client, they then become his or her *Default Delivery Items*. A Client can have his or her Default Items overridden for any delivery, however. If a Client is receiving Ongoing deliveries the items can be adjusted by creating a Scheduled delivery in lieu of, or in addition to, a regular delivery. If a Client is receiving Episodic deliveries, the items can be adjusted for a delivery on any specific date. See pages 64 (Ongoing), 73 (Scheduled) and 76 (Episodic) for information on customizing a Client's delivery items.
- A *Client's Default Route* is the route that will be used for every delivery, unless a day-specific Route has been assigned. See page 71 for information on where the Default Route is set.

- A Stop is where the Client falls on the Route: the first, second or third Stop, for example. A *Client's Default Stop* is the Stop that will be used for every delivery, unless a day-specific Stop has been assigned. See page 71 for information on where the Default Stop is set.

With this groundwork laid out, we can now proceed with the *What, Where* and *How...*

Using the Database Administrator (dbAdmin.exe)

The *Database Administrator* is used to set the location of the MealService data files and the method of connecting to those files (either File Sharing or Client-Server). It must be run prior to starting MealService the first time, or thereafter any time the data files are moved from one location to another. (The installation routine on the Install CD also performs the functionality of the Database Administrator.) The *Database Administrator* is accessed from the Windows **Start** menu in the **Programs | MealService** group.

The **Operation Mode** entry determines how MealService will connect to its data. Setting this option to **File Server** means that MealService will connect to a shared directory located on the network (or locally, if MealService is running on a single PC). Setting this option to **Client-Server Engine** instructs MealService to access its data via a Client-Server engine.

When set to File Server, the Database Administrator has an entry labeled **Database Location**. The location of the data (that is, the directory containing the data you want to use) should be displayed in that edit field. If the directory listed does not reflect the actual location of the data, then click on the ellipsis (...) button to the right of the existing data directory. In the resulting **Locate MealService Data folder** dialogue, navigate to the appropriate directory (that is, the directory containing the data), click on the directory name to select it, and then click **OK** to close the dialogue. See the following illustration:

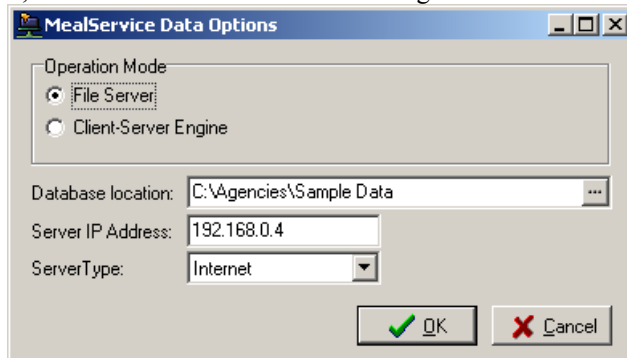


Illustration 5: Database Administrator screen, set to File Server mode

When set to Client-Server Engine, the Database Administrator has an entry labeled **Shared Ini Directory**. The location of the report and initialization files should be displayed in that edit field. If the directory listed does not reflect the actual location of the report files, then click on the ellipsis (...) button to the right of the existing directory. In the resulting **Locate MealService Data folder** dialogue, navigate to the appropriate directory (that is, the directory containing the report files), click on the directory name to select it, and then click **OK** to close the dialogue. See the following illustration:

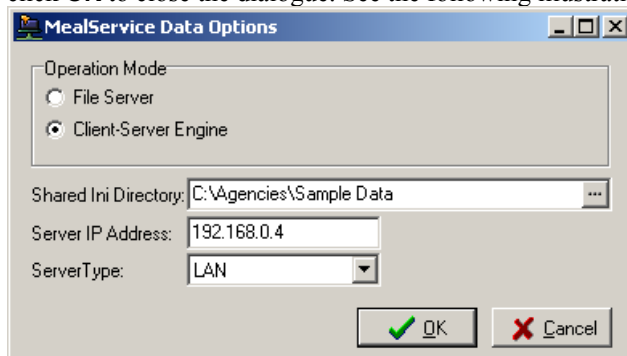


Illustration 6: Database Administrator screen, set to Client-Server mode

The **Server IP Address** entry only has a bearing if connecting via the Client-Server engine. It can be ignored if connecting via File Server mode. The **Server IP Address** consists of four groups of 1- to 3-digit numbers, separated by decimals (as in 123.45.678.1). This entry must be set to the IP address of the server on which the Client-Server Engine is running.

The final entry is a drop-down list labeled **Server Type** and only applies if the Client-Server Engine is being used. The available selections are **LAN** or **Internet**. This would normally be set to LAN, unless the user were connecting over a relatively slow dial-up connection, in which case it could be set to Internet.

The Database Administrator creates its entries locally in the registry of the PC. That means that it must be run locally on any machine prior to launching MealService on that same machine. If, upon launching MealService, you receive an error message stating “The MealService database has not been defined” most likely it is due to the Database Administrator not yet having been run.

Setting Up Users and Assigning Access Levels

The *User Maintenance* utility is used to create MealService user accounts, and to modify user access rights. It is accessed from the Windows **Start** menu in the **Programs | MealService** Group. The User Maintenance Utility consists of one screen:

User ID	User Name	Access Level	Active
danny	Danny Stewart	Full Read/Write	<input checked="" type="checkbox"/>
john	John Dixon	Full Read/Write	<input checked="" type="checkbox"/>
mary	Mary Scott	Read Only	<input checked="" type="checkbox"/>
phil	Philip Frank	Full Read/Write	<input checked="" type="checkbox"/>

User ID:

User's Full Name:

Access Level:

Enable the ExecuteOnOpen Query: ☒

Enable the ExecuteOnClose Query: ☒

Prompt when data is older than:

Password:

Active: ☒

1.0.1.53

Search For User:

Illustration 7: User Maintenance Screen

To create a user account, click on the Plus (+) button to create a new record (The + button is one of the VCR buttons on the bottom of the screen), then edit the following fields, as appropriate:

User ID: Enter a User ID of up to 10 characters. This is the ID with which the user will log in to MealService. The User ID is case sensitive.

User's Full Name: Enter the user's full name. This information will be used to identify the user as he/she uses MealService.

Access Level: This sets the user's access rights. The choices are:

- **Full Read/Write** — this grants full rights to the user
- **Read Only** — this grants the user rights to view any and all data in the system, but not to make any

changes to the data

- **Reports Only** — this allows the user access to the reports menu only.

Enable the ExecuteOnOpen Query: this checkbox must be checked if the user is to be prompted to execute the OnOpen query. (See “Configuring Auto-executing Queries”, page 183, for information on the Auto-executing queries.)

Enable the ExecuteOnClose Query: this checkbox must be checked if the user is to be prompted to execute the OnClose query. (See “Configuring Auto-executing Queries”, page 183, for information on the Auto-executing queries.)

Prompt when data is older than: This determines whether the user, upon selecting a delivery report, should be prompted to re-prepare the deliveries, if the delivery data is older than specified. The choices are:

- **Four Hours**
- **One Day**

Password: this feature is not functional in this version.

Active: this checkbox must be checked if the user is to have access to MealService. The box can be unchecked when someone leaves the organization, thus rendering the user account inactive.

Click the ‘✓’ button to save the changes or the ‘✕’ button to cancel without saving.

You can use the browse window at the top of the screen to navigate the data, but no changes can be made in that window other than to select a User’s Access Level.

The user data displayed in this screen is shared with the Staff data. The Staff data is used to populate the Nutritionist and Driver drop-down lists. Therefore, there may be user names visible without User IDs or Access Levels, because they are Nutritionists and/or Drivers who do not use the software and therefore do not have a User ID assigned.

Setting Up the Organization Address and other basic Configuration elements

The basic options that should be set prior to using MealService are all managed using the **Configuration** screen. The Configuration screen is accessed by selecting **Edit | Table Maintenance | Configuration** from the main menu. You will notice that the screen is organized by tabs across the top of the screen, as illustrated below:

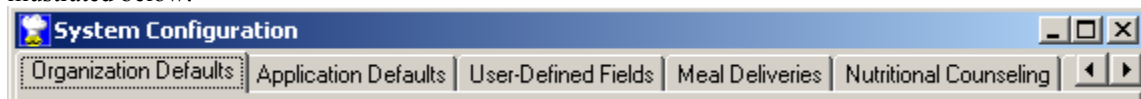


Illustration 8: Configuration Screen tabs

For complete documentation on the Configuration Screen see “Screen 22: Configuration Screen (System Defaults)”, Page 36. At a minimum, the following options should be configured at this time:

- The Organization name and address should be entered, as appropriate, on the **Organization Defaults** tab. If the name of the organization should appear in the headings of reports, it should also be entered in the field labeled **Organization Name for Reports**.
- The fields that should be visible on the Client screens should all be set to visible. You can then later hide those fields that are not relevant to your organization. To make all of the fields visible, on the **Application Defaults** tab, locate the **Component Visibility** tree:

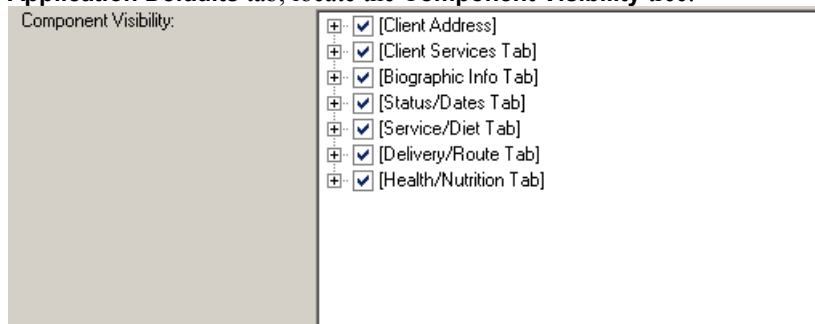


Illustration 9: Component Visibility tree

Ensure that there is a checkmark (☑) in front of each of the entries, as illustrated above. (Users that are upgrading MealService from an earlier version may need to repopulate the Component Tree [to make any newly added screen components visible on the tree]. To do so, right-click on the tree and select **Repopulate Component Visibility Tree** from the context menu.)

You will notice that the branches of the tree correspond to the tabs on the Client screen. To hide a component on one of the tabs of the Client screen, expand the appropriate branch (by clicking on the + sign). Clicking the + sign affiliated with a tab will reveal the component names, or groups of components, on that tab. Remove the checkmark from any components that should not be visible. For example, to hide components on the Biographic Info tab, expand that branch. In the illustration below, the Personal Stats group has been expanded, and within that group the Social Security Number, Marital Status, and Rural fields are being set to hidden.

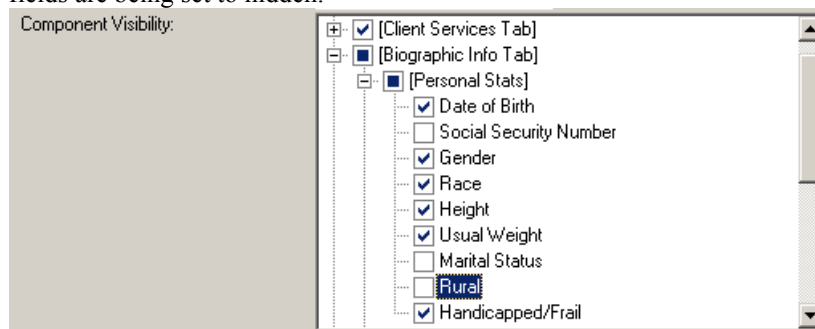


Illustration 10: Component Visibility Tree, setting components to be hidden

There are two components that cannot be simultaneously visible, because they occupy the same location on the screen. They are located on the Biographic Info Tab, and the two components are Housing/Living Arrangement and Credit Card information. One or the other must be set to invisible, or the following dialogue will be displayed when MealService is launched:

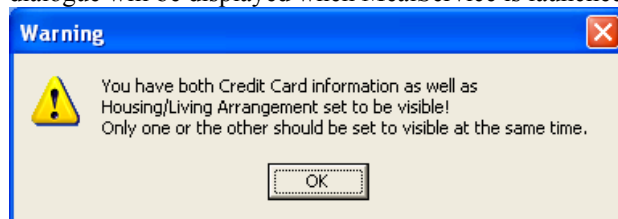


Illustration 11: Housing and Credit Card visibility warning

Remove the checkmark from in front of one, or both, components in the Component Visibility Tree to resolve this conflict.

NOTE: Changes which affect the appearance of the Client screen (such as modifying the entries in lists or changing the visibility of a component) will not normally become effective until one of two events happen: MealService is closed and restarted, or the Client screen is *refreshed*. To refresh the Client screen, from the main menu select **File | Refresh Lists**.

Special Meals: MealService accommodates those organizations that make customized or modified Meals for only those clients affected by a menu on a particular day. The customized meals that are needed on a particular day are called *Special Meals*. If your organization only makes special meals for those Clients who need them on a particular day (as opposed to *always* making dietary-specific meals for *all* clients, even if that day's menu doesn't affect them), then it is suggested that the Special Meal functionality in MealService be turned on. When this feature is turned on MealService offers the option to flag, on delivery reports, those Clients who will be receiving one of the special meals. It also offers the option of printing labels for only those Clients who need one of the special meals. This feature is enabled when **Flag Special Meals** is checked, as illustrated below:

Special Meals

Flag Special Meals ☒

Special Meal Label: Special One: Special Hot Special Two: Special Cold

Special Meal Abbreviation: SH SC

Illustration 12: Special Meals options

The Special Meals settings are located on the **Meal Deliveries** tab of the **Configuration** screen.

The last step in making the preliminary settings is to populate the supporting tables as described in “Entering Data into the Supporting Tables” on Page 23. Two of the most important steps in populating those tables are:

1. Defining the Services and
2. Defining the standard delivery items for each delivery service.

See Also

Configurable Screen Elements, Page 16

Managing Special Meals, Page 122

Entering Data into the Supporting Tables, Page 23

Configurable Screen Elements

Virtually all screen elements can be hidden, or revealed, as necessary. See “To hide a component”, on page 14, for instructions on this feature. In addition, the following illustrations indicate which screen elements are configurable (in terms of formatting and/or behavior), and the menu paths to locate where those elements are modified.

Client Name and Address

MealService Clients

File Edit View Reports Utilities Help

1143.0 Meal Status: Stopped

First/Middle/Last Name: Philip Frank

1 Main St

City/State/ZIP: Denver CO 80201

Organization Client: ☐

Email: Primary Phone: Secondary Phone:

App Date Service Status Assigned To File Location

Illustration 13: City/State/ZIP Code fields of main Client screen

1. When a new name is added to the database the City, State and ZIP will default to the values entered via **Edit | Table Maintenance | Configuration** (Meal Deliveries tab), **Default City / State / Zip** fields. The behavior and formatting of the ZIP/Postal field is determined by selecting a regional entry from the **Postal/Phone Format** drop-down list, found on **Edit | Table Maintenance | Configuration** (Application Defaults tab).

Client Services tab

Illustration 14: Client Services tab configurable components

1. Having documents appear here is a two-step process. The documents (regardless of which Service uses them) must first be created and/or edited in the Edit Client Documents dialogue, which is reached via **Edit | Table Maintenance | Client Documents** (See “Screen 2: Client Documents”, page 24). Then, the Application Documents are then defined for each Service via **Edit | Table Maintenance | Configuration** (Client Services tab), **Set Intake Documents** button. (See “Screen 19: Application Intake Documents”, page 33.)
2. Having conditions appear here is a two-step process. The conditions (regardless of which Service uses them) must first be created and/or edited in the Conditions for Certification dialogue, which is reached via **Edit | Table Maintenance | Certification Conditions** (See “Screen 1: Conditions for Certification”, page 23). Then, the Application Conditions are defined for each Service via **Edit | Table Maintenance | Configuration** (Client Services tab), **Set Intake Conditions** button. (See “Screen 20: Application Intake Conditions”, page 34.)
3. Other Information items are defined via **Edit | Table Maintenance | Configuration** (User-Defined Fields tab), **User-Defined Application Checklist** Items field.
4. Other Information field label is defined via **Edit | Table Maintenance | Configuration** (User-Defined Fields tab), **Application User-Defined Field Label** field.

Biographic Info tab

MeaService Clients

File Edit View Reports Utilities Help

Meal Status: 1143.0 Stopped

First/Middle/Last Name: Philip Frank

Address: 1 Main St

City/State/ZIP: Denver CO 80201

Email: Primary Phone: Secondary Phone:

☐ Organization Client

Client Services

Biographic Info

Date of Birth: Gender: Race: Asian Black Caucasian Hispanic

Height: Ideal Weight:

Marital Status: Divorced Wdwd, Spousal Equiv Married Single Spousal Equivalent

Number of Children: Children Receiving:

Income Category: Income Sources: ESI ESDI Food Stamps WIC AND STD Disability Pension Private Disability P/T Work F/T Work Unemployment

Income per Month: Primary Language: Illiterate

Other Income Sources:

Favorite Desert:

Other Food Source: CAP Food Bank POCCAA VOA Milk/Groceries VOA Home Delivered Meals

Search For: LAST_FIRST FRANK Browse Filter Add Client Close

System Administrator 1/10/2002 8:19:24 PM

Illustration 15: Biographic Info tab configurable components

1. Race drop-down list items are entered via **Edit | Table Maintenance | Race Codes**.
2. Marital Status drop-down list items are entered via **Edit | Table Maintenance | Marital Status**
3. Income Source checklist items are defined via **Edit | Table Maintenance | Configuration (Client Services Tab), Income List Items** field.
4. The label for User-Defined Field 1 is entered via **Edit | Table Maintenance | Configuration (User-Defined Fields tab), Label for User-Defined Field 1** field.
5. The label for User-Defined Field 2 is entered via **Edit | Table Maintenance | Configuration (User-Defined Fields tab), Label for User-Defined Field 2** field.
6. The label for the User-Defined checklist is entered via **Edit | Table Maintenance | Configuration (User-Defined Fields tab), Label for User-Defined Bio Checklist** field.
7. The items in the User-Defined checklist are defined via **Edit | Table Maintenance | Configuration (User-Defined Fields tab), User-Defined Bio Checklist Items** field.

Relationships

Relationship: Case Manager

Related Individual ID: Contact Person

First / Last Name: Father Smith

Salutation: Neighbor

Organization: Social Services Agency

Address:

City / State / ZIP:

Phone: 123-455-7890

Secondary Phone:

Email:

☐ Referral Source

☐ Relation is aware of client's medical status

☐ Emergency Contact

Notes on this relationship

Created By: System Administrator On: 1/2/2002

OK Cancel

Illustration 16: Relationship dialogue configurable component

1. The default entries in the relationship list are defined via **Edit | Table Maintenance | Configuration** (Client Services Tab), **Relationship List Items** field.

Service/Diet tab

The screenshot shows the 'MealService Clients' application window. The 'Services/Diet' tab is selected in the left sidebar. The main content area is divided into several sections:

- Delivery Services Used:** Contains three radio buttons: ☒ Fresh Meal Service, ☐ Frozen Meals, and ☐ Custom Meal Plan. This section is circled in red with a yellow circle containing the number 1.
- Diet Modifications:** Contains four checkboxes: ☐ Low Cholesterol - Red, ☐ No Pork - Gold, ☐ Easy to Swallow - Blue, and ☐ Diabetic - Green. This section is circled in red with a yellow circle containing the number 2.
- Other Services Used:** Contains two checkboxes: ☐ Volunteer and ☐ Employee. This section is circled in red with a yellow circle containing the number 3.
- Set Custom Funding Sources:** Contains a list box with 'Fresh Meal Service' selected, and a list of funding sources: ☒ CSBG, ☐ Komen, and ☐ Ryan White. This section is circled in red with a yellow circle containing the number 4.

At the bottom of the window, there are buttons for 'Add Service Funding' and 'Delete Selected Funding'. The search bar at the bottom shows 'LAST_FIRST' and 'FRANK'. The status bar at the bottom indicates 'System Administrator 1/12/2002 6:57:52 PM'.

Illustration 17: Service/Diet tab configurable components

1. Delivery Services Used are defined via **Edit | Table Maintenance | Services**. Those services defined as both a *delivery* service (using the **Service Type** drop-down list) and *mutually exclusive* (using the **Mutually Exclusive** checkbox) appear in this list.
2. Diet Modifications are defined via **Edit | Table Maintenance | Diet Modifications**.
3. Other Services Used are defined via **Edit | Table Maintenance | Services**. Those services defined as being *not* mutually exclusive appear in this list.
4. Funding Sources are defined via **Edit | Table Maintenance | Funding Sources**.

Delivery/Route Info tab

Illustration 18: Delivery/Route Info tab configurable components

1. Routes are defined via **Edit | Table Maintenance | Routes**.
2. The default font name and size for the directions window is defined under **Edit | Table Maintenance | Configuration** (on the Meal Deliveries tab), **Select Font and Size** button.

Address Overrides

Illustration 19: Address Overrides dialogue configurable components

1. The default entries in the address description list are defined via **Edit | Table Maintenance | Configuration** (Meal Deliveries tab), **Address Override Description Items** field.

User-Defined Reports Menu

Up to five user-defined reports can be attached to the main menu, and accessed via the **Reports | Print | Other Reports | User-Defined Reports** selection. Any self-contained report template can be added to the menu simply by renaming it using the following convention. (A self-contained report template is one that was designed using the Report Designer so that any required data and dialogues are generated internally by the report. Typically, any reports designed by a MealService user using the Report Designer *would be* self-contained and could be placed on the menu.)

The naming convention is as follows: the first user-defined report must be named UserDefinedReport01.rtm (the name is case insensitive. Upper case has been used selectively here to clarify the report template name). The second must be named UserDefinedReport02.rtm, and so on. As with all report templates, the .rtm files must be placed in the same directory as that which contains the MealService data.

The menu labels displayed on the User-Defined Reports menu can be customized as well. They are defined via **Edit | Table Maintenance | Configuration** (User-Defined Fields tab), **Label for User-Defined Report 1** through **5**: there is one edit field for each report.

Assigning User-Defined Reports to the report selection dialogues

Unlimited user-defined reports can be configured to appear on the four report-selection dialogues (the Delivery-, Counseling-, Alerts/Follow-Up- and Agency-Report dialogues). To have a report appear on one of those dialogues, the report template file name must begin with (respectively) *UserReportDelivery*, *UserReportCounseling*, *UserReportAlerts* or *UserReportAgency*. For example, a template named *UserReportDeliveryCold Bag Counts.rtm* will have the *UserReportDelivery* portion of the file name stripped off and the *Cold Bag Counts* will appear as the report choice. Since user-defined reports must use their own data providers and use their own dialogues for selecting that data, when a user-defined report has been selected in one of the above dialogues, the dialogue's data selection components will be disabled. For example, in the Delivery Reports dialogue, the Date Range, Services, and Routes and Distribution Centers selectors will become disabled when a user-defined report has been selected.

Auto-executing Queries

MealService supports four customizable system queries that can be 'triggered' by certain events. Virtually anything that can be calculated or performed in a query can be executed automatically. For example, clients' status can be changed to *Stopped* on the appropriate day based on their stop date or clients can be assigned a staff contact based upon the client's name or other arbitrary logic. Three of the events are triggered automatically:

- when MealService is opened
- when MealService is being closed
- after a change is made to any client's information

See "Configuring Auto-executing Queries", page 183, for information on how these queries are configured and can be used.

One query is triggered by user action:

- pressing **Control+Alt+U** triggers a query that can be used to calculate a unique identification number. See "Automatically generating a Unique Record Number", page 177 for more information on this feature.

Chapter 2

Entering Data into the Supporting Tables

This section explains how to populate the many database tables (referred to as *screens*) that let agencies customize MealService to their individual needs.

The six most important screens that must be configured before scheduling deliveries are as follows. In order of the sequence in which they should be populated, the critical screens are:

1. Services, Page 31
2. Event Types, Page 27
3. Routes, Page 30
4. Diet Modifications, Page 26
5. Meal Items, Page 29
6. Meal Composition / Default Delivery Items, Page 35

NOTE: The demo version of MealService has the above and other screens populated with data representing a typical delivery organization.

The following screens can be optionally configured before using the software, or can be configured once MealService is in use. They add functionality, but are not critical to scheduling deliveries:

- Conditions for Certification, Page 23
- Client Documents, Page 24
- Cold Bag Codes, Page 24
- Cold Bag Usage, Page 24
- Cuisines, Page 26
- Diseases, Page 26
- Funding Sources, Page 27
- Locations/Dist Centers, Page 28
- Marital Status, Page 28
- Race Codes, Page 30
- Staff Members, Page 32
- Stop Reasons, Page 32
- ZIP Codes (for agencies within the United States), Page 32
- Application Intake Documents, Page 33
- Application Intake Conditions, Page 34

Screen 1: Conditions for Certification

Description: Conditions that a potential client must meet in order to qualify for service. Together with the appropriate documents (see Screen 2), they create an “Application for Service.”

Menu Path: File | Table Maintenance | Conditions for Certification

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Condition ID	Assigned automatically	NA	NA
Condition	Text	100 characters	Enter a medical or other condition a client must meet, for example, “HIV positive”, “unable to prepare own meals”, “unintentional weight loss”, etc.
Default Requirement Level	Drop-down list	NA	Currently non-functional; may be used in the future to automate the acceptance process by indicating that an application meets a sufficient number of the agency’s requirements. The list includes the following choices: <ul style="list-style-type: none">■ Required — Condition must be met for acceptance.■ One of Several — Clients will qualify who meet a predefined number of “one of several” conditions.

			■ Wildcard — Clients who meet any wildcard condition qualify for acceptance.
--	--	--	---

Screen 2: Client Documents

Description: Documents that must be submitted and/or tracked when a client applies for a specific service. Together with the appropriate conditions (see Screen 1), they create an “Application for Service”.

Menu Path: File | Table Maintenance | Client Documents

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Document ID	Assigned automatically	NA	NA
Document Name	Text	50	Enter a short name for this document, for example, “Application”, “Release Authorization”, etc.
Document Description	Text	100	Enter a more complete description of this document.
Default Requirement Level	Drop-down list	NA	Currently non-functional; may be used in the future to automate the acceptance process by indicating that an application meets a sufficient number of the agency’s requirements. The list includes the following choices: ■ Required — Condition must be met for acceptance. ■ One of Several — Clients will qualify who meet a predefined number of “one of several” conditions. ■ Wildcard — Clients who meet any wildcard condition qualify for acceptance.

Screen 3: Cold Bag Codes

Description: Cold Bag Codes are a method of identifying the contents of a Cold Bag. For example, some organizations use color codes: Black, Red, etc. The color code could be used to identify bags by diet type.

Menu Path: File | Table Maintenance | Cold Bag Codes

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Record ID	Assigned automatically	NA	NA
Bag Code	Text	25	Enter the cold bag code.

Screen 4: Cold Bag Usage

Description: Cold Bag Code Usage can be used to assign specific Cold Bag Codes to combinations of diet codes. For example, the Black Cold Bag Code might be used to indicate cold bag contents intended for Diabetic or Diabetic/Easy to Swallow clients. A Kosher/Easy to Swallow client might receive a Red cold bag. The Cold Bag Usage maintenance dialogue has a feature that lets you identify all of the unique combinations of diet codes found in the Client population, to facilitate assigning a Cold Bag Code to each of the diet combinations.

Menu Path: File | Table Maintenance | Cold Bag Code Usage

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Cold Bag ID	Assigned automatically	NA	NA
Cold Bag Code	Drop-down list	NA	Select a Cold Bag Code from the drop-down list. NOTE: The Cold Bag table must be populated with data in order for any

Field Name	Type	Max. No. Characters	Legal Value/ Comments
			choices to appear in this list (See “Screen 3: Cold Bag Codes”, Page 24).
Applicable Diets	Checklist	NA	Check the applicable diets to be accommodated by this Cold Bag Code.

The **Cold Bag Usage** dialogue appears as follows:

Illustration 20: Cold Bag Usage dialogue

Clicking the **Check Diet Combos** button will generate the following screen:

Illustration 21: Cold Bag Diet Combinations dialogue

The list contains all of the unique combination of diet codes that do not yet exist in the Cold Bag Usage table. To add selected diet combinations to the Cold Bag Usage table, enter a checkmark for the selected diets, then click the **Create Checked** button. The diets will be automatically added to the Cold Bag Usage table and this dialogue will then close. The next step would be to edit the new Cold Bag Usage records and

manually assign the appropriate Cold Bag Code to each.

Screen 5: Cuisines

Description: Cuisines are a way to offer specialized ethnic diets. For example, some organizations offer a Latin menu, or a Caribbean menu. If your organization does not offer ethnically-targeted menus, then there should be one entry in this screen with the description of Standard.

Menu Path: File | Table Maintenance | Cold Bag Codes

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Cuisine ID	Assigned automatically	NA	NA
Cuisine/Track	Text	25	Enter the cuisine type.

Screen 6: Diet Modifications

Description: The various dietetic conditions that might affect a client's menu, such as "Kosher", "diabetic", "food must be easy to swallow", etc.

NOTE: MealService supports a maximum of 31 defined diets.

Menu Path: File | Table Maintenance | Diet Modifications

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Diet ID	Numeric	NA	Specify a unique numeric ID for each item. <i>This ID cannot be used by any other diet modification.</i> Numeric ID determines the sort order of items within the Diet Modifications checklist. The IDs <i>must</i> be sequential, beginning with one (1).
Diet Modification	Text	35	Enter the complete description of the modification.
Identifier	Text	25	Specify an identifier for each modification. For example, "no wheat" might be "NW" or "BLUE". If you do not use such an identification system, repeat the modification entered in the previous field. NOTE: Because the first five characters of each identifier are stored in the database as a description of the client's diet, we suggest that the first five characters of each be unique. In addition, 50 spaces are allocated to storing the Diet Modifications on the delivery reports. If a Client has a combination of Diet Identifiers which exceeds 50 characters, the balance of the identifiers will be truncated!

The **Delete/Rearrange** button can be used to launch the **Modify Diet Codes** utility. The **Modify Diet Codes** utility is used to change the display order of the diet modifications and/or to delete any diet modifications. See "Deleting/Rearranging Diet Codes", Page 175 for detailed instructions on how to use the utility.

Screen 7: Diseases

Description: Diseases are used to populate the selection of diseases available in the disease drop-down list on the Client health tab.

Menu Path: File | Table Maintenance | Diseases

Field Name	Type	Max. No. Characters	Legal Value/ Comments
------------	------	---------------------	-----------------------

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Disease ID	Assigned automatically	NA	NA
Disease	Text	100	Enter the disease description.

Screen 8: Event Types

Description: Events that occur on a regular basis. For example: a Nutritional Counseling service might have a “counseling session” event, or a Meal Delivery service might have “meal delivery” as an event. Each service can have several events.

Menu Path: File | Table Maintenance | Event Types

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Event Code	Assigned automatically	NA	NA
Event Type	Text	40	Enter a description of the event, such as “hot meal delivery” or “nutritional counseling session”. ≥TIP≤ Including the word <i>Group</i> in the Event Type field will cause two additional Group statistics fields to be visible on the Nutritional Counseling Event form.
Service	drop-down list	NA	Select the service under which this event falls. NOTE: The Services table must be populated with data in order for any choices to appear in this list (See “Screen 15: Services”, Page 31).

Screen 9: Funding Sources

Description: All of the possible funding sources for any agency service. The data you enter in this screen is used to populate the **Funding Sources** list of checkboxes on the **Funding/Billing** tab of the **Clients** screen and the **Default Funding Source** drop-down list on the **Services** maintenance screen.

Menu Path: File | Table Maintenance | Funding Sources

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Fund ID	Assigned automatically	NA	NA
Fund Abbreviation	Text	3	Specify an abbreviation for each fund, for example, “CHD” for City Health Department. NOTE: Because this abbreviation is stored in the database as a description of the client’s funding sources and is used in other screens, the fund abbreviation <i>must be unique and cannot be duplicated</i> or used by any other funding source..
Fund Source	Text	50	Enter a full description of the funding source, for example, “City Health Department”.
Address	Text	35	Enter the street address for this funding source. Two lines are available for the address.
City	Text	35	Enter the city for this funding source.
State	Text	2	Enter the state for this funding source.
ZIP	Text	10	Enter the zip code for this funding source.
Contact	Text	40	Enter the primary contact for this funding source.
Phone	Text	20	Enter the contact’s phone number.
Fax	Text	20	Enter the contact’s fax number.

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Email	Text	65	Enter the contact's email address.
Customer/ Funder ID	Text	10	This entry contains the Customer ID for the (optional) integrated accounting system.
Copy Current	button	NA	This button is held in reserve for future functionality.
Party to be billed	Drop-down list	NA	Serves to identify the billed party for clients receiving funding from this source. The choices available are: <ul style="list-style-type: none"> ■ Third Party ■ Client (Private Pay) ■ No Billing
Reimbursement method is calculated by	Drop-down list	NA	Identifies the method by which the funding source reimburses the agency. The choices available are: <ul style="list-style-type: none"> ■ Time Period ■ Meals or Meal Items

Screen 10: Locations/Distribution Centers

Description: Used to identify locations at which nutritional counseling is available and/or which serve as a distribution center (a distribution center is a location from which delivery routes originate).

Menu Path: File | Table Maintenance | Locations/Dist Centers

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Location ID	Assigned automatically	NA	NA
Code	Text	10	Specify a unique code for each location/distribution center. For example, "East". <i>This code cannot be used by any other center.</i>
Location	Text	50	Enter a description of the location, like "agency office", "City Health Clinic #1", etc.
Address	Text	50	Enter the street address of this location
City	Text	25	Enter the city for this location
State	Text	2	Enter the state for this location
ZIP	Text	10	Enter the ZIP or postal code for this location
Counseling Location	Checkbox	NA	This box should have a checkmark if this location is a counseling location. Locations with this box checked will appear as possible nutritional counseling locations on the Client Nutritional Counseling Event screen. (see "Counseling Events", Page 81).
Distribution Center	Checkbox	NA	This box should have a checkmark if this location is a meal distribution center or is a location from which routes originate. Locations with this box checked will be available as route starting points in the Mapping functionality. (See "Mapping with MapPoint and Streets & Trips/AutoRoute", Page 178)
Site type	Text	1	Currently non-functional; included for agency informational purposes and possible future use (may be used to identify a funding source or other information).

Screen 11: Marital Status

Description: Populates the **Marital Status** drop-down list on the **Biographic Info** tab of the **Clients** screen.

Menu Path: File | Table Maintenance | Marital Status

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Status ID	Text	2	For each status, enter an ID such as W for widowed. <i>This ID must be unique and cannot be duplicated.</i> NOTE: Using alpha codes rather than numeric ones will simplify for the user the process of querying the client data since the codes will be intuitive.
Marital Status	Text	25	Enter some text describing the marital status. This wording will appear in the Marital Status drop-down list on the Biographic Info tab of the Clients screen.

Screen 12: Meal Items

Description: The individual items that compose a meal, for example:

- bag of breakfast items
- hot entrée
- nutritional supplement – chocolate

≧**TIP**≦ The Meal Items should be set to the lowest level of allowable client modification. For example, if you have a Cold Bag which consists of soup, bread, and desert, but you do not allow Clients the option of modifying the contents of the Cold Bag then you should set the item as Cold Bag. If you allow the option of requesting a Cold Bag without a soup, then you might consider creating two items: Cold Bag and Cold Bag without Soup. If you allow complete customization of the contents of the Cold Bag, then you might consider creating the discrete items of Soup, Bread, and Desert.

Menu Path: File | Table Maintenance | Meal Items

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Item Code	Assigned automatically	NA	NA
Meal Item	Text	40	Enter the delivery or menu item, for example, “hot entrée” or “cold bag”.
Meal	drop-down list	NA	Select an item for crediting purposes, should your agency desire analysis by type of meals. (Optional; available choices are Breakfast, Lunch, Dinner, Snack, Other, Medical Food and Specialized Medical Food .) If Number of Credits (see next field) is greater than 0, client will be credited with this meal.
Number of Credits	numeric	NA	Enter the number of meals for which client will be credited if he/she receives this item. For example, an item named “6-pack frozen entrees” could be counted as six meals; a piece of fruit or nutritional supplement might count as 0 meals.
Labels per Item	numeric	NA	Enter the number of labels required for this item (if any). If the entry is left at zero and labels are printed, one label per client will print, regardless of the quantity of this item. If a value other than zero is entered, this number of labels per item per client will print. For example, if two is entered for the Labels per Item and a client receives two of the item then four labels will be printed for that client.
Cold Bags	numeric	NA	Enter the number of cold bags required for this item.
Default Charge	currency	NA	Enter the default charge for this item. This is the amount a client would be billed when receiving this item.

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Confirmation Required	drop-down list	NA	This selection determines which type(s) of deliveries require confirmation before the item is included. Select an entry from the drop-down list if this item requires confirmation and is not to be automatically included in every delivery. Available choices are: <ul style="list-style-type: none"> ■ Ongoing deliveries ■ Scheduled and Episodic ■ All deliveries
This item is frozen.	Checkbox	NA	Currently non-functional; included for future use and for agency informational purposes.
This item is served in bulk.	Checkbox	NA	Currently non-functional; included for future use and for agency informational purposes.

Screen 13: Race Codes

Description: Populates the **Race Codes** drop-down list on the **Biographic Info** tab of the **Clients** screen.

Menu Path: File | Table Maintenance | Race Codes

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Race ID	assigned automatically	NA	NA
Race Code	Text	1	For each race, enter a code such as “O” for other. <i>This code must be unique and cannot be used by any other race.</i> NOTE: Using alpha codes rather than numeric ones will simplify for the user the process of querying the client data since the codes will be intuitive.
Race Description	Text	20	Enter some text describing the race. This wording will appear in the Race drop-down list on the Clients Biographic Info screen.

Screen 14: Routes

Description: The delivery routes to which clients are assigned. Typically, a route is a collection of deliveries handled by one driver. All of the delivery reports are generated in route order.

Menu Path: File | Table Maintenance | Routes

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Route ID	Text	5	For each route, specify an ID of up to 5 characters. <i>This ID must be unique and cannot be duplicated or used by any other route.</i>
Route Description	Text	50	Enter an optional text description for each route. For example, Route ID CCW might have a Route Description of “Center City walking”; ID 201 might have the description “Frozen Meals, Gadsden County”.
Route Type	drop-down list	NA	Choices include Driving, Walking, Truck, Walk-In and Congregate . This entry is currently non-functional; it is included for future use and agency-designed queries only.
Distribution Center	drop-down list	NA	Select the distribution center from which this route originates. (The drop-down list is populated with data from the Locations/Distribution Centers screen (Screen 10: Locations/Distribution Centers, Page 28))

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Dist. Center Code	Text	10	This non-editable entry is populated automatically upon selecting a Distribution Center in the Distribution Center drop-down list. This is the code assigned to the distribution center in the Locations/Distribution Centers screen (Screen 10: Locations/Distribution Centers, Page 28).

Screen 15: Services

Description: The fundamental services provided by the agency, for example, hot meals, frozen meals, nutritional counseling. This table provides the default behaviors for when a client is assigned to one of these services.

Menu Path: File | Table Maintenance | Services

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Service Code	Assigned automatically	NA	NA
Service	Text	40	Enter the name of the Service. For example, 'Home Delivered Meals', 'Weekly Frozen', etc.
Service Type	drop-down list	NA	Available choices are Delivery Service , Counseling Service , Other Services . For each service, specify whether it is: a Delivery or Counseling Service, or other. Only those services designated "Delivery Services" will be included in any delivery reports. Likewise, only those services designated "Counseling Services" will be included in any counseling reports.
Mutually Exclusive	Checkbox	NA	If this box is checked (and the service is a Delivery service), the service will appear on the Clients screen in the list of mutually exclusive <i>radio buttons</i> labeled Delivery Services Used . If not, the service will be one of the entries in the Other Services Used checklist on the Clients screen. NOTE: When more than ten entries have been designated as mutually exclusive the radio buttons on the Clients screen become a drop-down list.
Default Event	Drop-down list	NA	For each service, select an event to be designated as the default event for the service. This list is populated with data from the Event Types screen [Screen 8: Event Types, Page 27]. MealService maintains a table of events (Events.dat) that is used to generate unique-client consumption statistics. If configured to do so, MealService posts a record to this table for any consumption of service by a client. The selection in the drop-down list determines which event is used for the specified service. For example, "Counseling Session" might be the default event for "Nutritional Counseling".
Default Frequency	Drop-down list	NA	Available choices are Episodic and Ongoing . This selection indicates the default delivery frequency for this service. Episodic indicates that the delivery frequency is other than every week, for example: every other week or the first Monday of the month. Ongoing indicates a delivery week after week, for example: every Monday, Wednesday, and Friday.
Delivery Type	Drop-down list	NA	Available choices are Delivered or Walk-In .

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Default Delivery Days	Checkboxes	NA	The checkboxes for the Default Delivery Days are only visible when the Default Frequency is set to Ongoing. Enter a checkmark into each of the days on which this service is normally delivered. When this service is selected for a new client, he or she will initially have the same days assigned as their delivery days.
Default Funding Source	Drop-down list	NA	This list is populated with choices from the Funding Sources (Screen 9: Funding Sources, Page 27). If desired, select the funding source with which the majority of clients receiving this service are funded.
Display Order	Numeric	NA	This selection determines the order that the Service will appear on the Clients screen. When displayed, the Service names will be sorted by the Display Order entry, from lowest to highest.

Screen 16: Staff Members

Description: Primarily used to populate the **Nutritional Counselors** drop-down list; also stores user names and access privileges. **NOTE:** While MealService user data can viewed on this screen, access privileges are actually assigned with the separate User Maintenance utility.

Menu Path: File | Table Maintenance | Staff Members

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Staff ID	Assigned automatically	NA	NA
Staff Member	Text	25	Enter the staff member's name. NOTE: This data is used to populate certain drop-down lists.
Nutritionist	Checkbox	NA	Checking the box causes this individual to appear in any drop-down list of nutritionists.
Driver	Checkbox	NA	Currently non-functional; may be used for agency information purposes such as indicating whether the individual is authorized to drive an agency vehicle. In a future version, may be used to determine whether the individual appears in a drop-down list of route drivers.
Volunteer	Checkbox	NA	Currently non-functional; may be used for agency information purposes. In a future version, may be used to calculate volunteer hours and percentage of routes delivered by volunteers.

Screen 17: Stop Reasons

Description: Populates the **Stop Reason** drop-down list on the **Clients** screen (see *Tracking the reason a client has been stopped* in "Status/Dates tab", Page 53). Typical reasons for stopping might include non-compliance, hospitalization, or client request.

Menu Path: File | Table Maintenance | Stop Reasons

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Stop ID	Assigned automatically	NA	NA
Stop Reason	text	25	Enter a reason for stopping delivery.

Screen 18: ZIP Codes

Description: Maintains the ZIP code lookup table. When MealService is configured for use in the United States, selecting a ZIP code on the **Clients** screen will cause MealService to populate the city and state fields automatically, based on the information in this table. (See “**City/State/ZIP**”, Page 49) This table also supports being able to analyze service consumption by county.

NOTES:

- This table is initially populated at the time of installation by using the **Copy ZIPs** utility found on the installation CD. (See “Installing MealService”, Page 7, for details.) **Copy ZIPs** inserts data provided by the United States Postal Service (USPS) into the **ZIP code**, **City**, **State** and **County** fields. You can edit this information or add new ZIP codes and the corresponding cities/states/counties.
- **Region** is user-defined; and this field is optional. The Region could be used to designate a section of a city that spans ZIP codes, for example.

Menu Path: File | Table Maintenance | ZIP Codes

Field Name	Type	Max. No. Characters	Legal Value/ Comments
ZIP Code	text	5	A five-digit United States ZIP code.
City	text	28	The USPS-approved name for this ZIP code
State	text	2	The USPS-approved two-character abbreviation for the state in which this ZIP code is located.
County	text	15	Enter the county name to which this ZIP code belongs. This field is optional, but when populated it can be used to generate statistics by county.
Region	Text	25	Enter an arbitrary geographic unit of your choice (for example, “North Philadelphia”). This field is optional, and can be used to generate service statistics for a region that is not easily quantified by either county or ZIP code.

Screen 19: Application Intake Documents

Description: Defines the set of Application Documents that are utilized when a client applies for a given service (See “Screen 2: Client Documents”, Page 24, for information on creating the supporting documents). For example, a client applying for meal deliveries might be required to submit three documents: an application, an information release, and a doctor’s verification of condition.

Menu Path: File | Table Maintenance | Configuration, Client Services tab, Set Intake Documents button

The **Edit Client Documents** screen appears as follows:

Illustration 22: Edit Client Documents screen

1. Using the **Select a Service** drop-down list, choose a delivery service. (The drop-down list is populated with data from the *Services* table; See “Screen 15: Services”, Page 31.)
 2. Click **Add Document** to create a blank line in the list of documents window.
 3. Click the right-most portion of the **Document** column. A ▼ button will become visible indicating a drop-down list. Clicking on the button will cause a drop-down list of all available documents to appear (populated with data from the *Client Documents* table; see “Screen 2: Client Documents”, Page 24.). Select the appropriate document from the list.
 4. Click the ▼ button on the rightmost portion of the **Requirement Level** column. A drop-down list of the various requirement options for this document appears. (The requirement level is for agency informational use only).
 5. The entry in the **Sort Order** column determines the order the conditions will be displayed when used for a Client Application. The Sort Order entry will be populated automatically, but you can edit it as necessary. To change the sort order of an entry, you can also click on the ↑ (Up) or ↓ (Down) buttons located on the bottom of the screen.
 6. Once the document, requirement level and sort order are correct, click the ‘✓’ button to save the addition.
- Repeat steps 2-6 as many times as necessary to add all of the application documents for the selected service.
7. From the drop-down list of services, select an additional service that might have an application process and define the documents used for that service. Repeat until all of the applicable services have had their documents defined.

The **Delete Document** button may be used to remove a document entered in error.

Screen 20: Application Intake Conditions

Description: Defines which Application Conditions (see “Screen 1: Conditions for Certification”, Page 23.) are applicable when a Client applies for a given service. For example, a client applying for meal deliveries might be required to be HIV+ and meet several optional conditions on an additional list (unable to prepare own meals, losing weight unintentionally, etc.)

Menu Path: File | Table Maintenance | Configuration, Client Services tab, Set Intake Conditions button

The Application Intake Conditions screen appears as follows:

Condition	Requirement Level	Sort Order
Undesired weight loss	One of Several	
Blindness	One of Several	1
Fatigue	One of Several	2
*		3

Over 60 Years Old
HIV+ Status
Undesired weight loss
Fatigue
Blindness

Add Condition ✓ ↑ ↓ Delete Condition Close

Illustration 23: Edit Conditions for Certification screen

1. Using the **Select a Service** drop-down list, choose a delivery service. (The drop-down list is populated with data from the *Services* table; See “Screen 15: Services”, Page 31.)
2. Click **Add Condition** to create a blank line in the list of conditions window.
3. Click the ▼ button on the rightmost portion of the **Condition** column. A drop-down list of all available

conditions appears (populated with data from the *Conditions* table; see “Screen 1: Conditions for Certification”, Page 23.). Select the appropriate condition from the list

4. Click the rightmost portion of the **Requirement Level** column. The ▼ button will become visible indicating a drop-down list containing the various requirement options for this document. (The requirement level is for agency informational use only).
 5. The entry in the **Sort Order** column determines the order the conditions will be displayed when used for a Client Application. The Sort Order entry will be populated automatically, but you can edit it as necessary. To change the sort order of an entry, you can also click on the ↑ (Up) or ↓ (Down) buttons located on the bottom of the screen.
 6. Once the condition, requirement level and sort order are correct, click the ‘✓’ button to save the addition.
- Repeat steps 2-6 as many times as necessary to add all of the application conditions for the selected service.
7. From the drop-down list of services, select an additional service that might have an application process and define the conditions used for that service. Repeat until all of the applicable services have had their conditions defined.

The **Delete Condition** button may be used to remove a condition entered in error.

Screen 21: Meal Composition / Default Delivery Items

Description: Defines which, and how many, Meal Items comprise a delivery for a given service on a given day. You must define a Default Delivery for every service specified as a *Delivery Service* in the **Services** table (Screen 15: Services) and for every day of the week for which the agency delivers that service.

Menu Path: File | Table Maintenance | Configuration, Client Services tab, Set Default:Delivery Items button

The Set Default Deliveries screen appears as shown:

Day	Quantity	Item	Order
MON	1	Hot Meal	1
MON	1	Fresh Lunch	2
MON	1	Grocery Box	3

Illustration 24: Set Default Deliveries

The step-by-step directions for this screen are as follows:

1. Select a delivery service from the **Select a service** drop-down list, then click one of the delivery day buttons.
2. Click **Add Item** to create a blank line in the list of items window. The **Day** column indicates the selected day and cannot be edited. The **Quantity** column defaults to one when a new item is added, but you can edit this value as appropriate.
3. Click the ▼ button on the rightmost portion of the **Item** column. A drop-down list of all available items appears (populated with data from the *Meal Items* table, see “Screen 12: Meal Items”, Page 29.). Select the appropriate item from the list.
4. The entry in the **Order** column determines the order the items will be displayed on delivery reports. The Order entry will be populated automatically, but you can edit it as necessary. To change the sort order of an entry, you can also click on the ↑ (Up) or ↓ (Down) buttons located on the bottom of the

screen.

5. Once the quantity and item are correct, click the '✓' button to save the addition. Repeat steps 2-5 as many times as necessary to add all of the default delivery items for the selected service on this day, then click the next day's button and repeat the process.

The **Delete Item** button may be used to remove an item entered in error.

To speed the process of duplicating the items for each day of the week, the **Dupe Monday** button can be used. Once Monday is populated with delivery items as desired, clicking **Dupe Monday** will copy all of the items from Monday and add them (in addition to any existing items) to each of the other days of the week.

6. Once all of the days have been populated appropriately, select the next service from the drop-down list and set the items for every day. Repeat until all of the services have had their Default Deliveries specified.

Screen 22: Configuration Screen (System Defaults)

Description: The Configuration Screen contains most of the entries which affect default behaviors for MealService as a whole, and for each of its primary functions: Client Services, Meal Deliveries, and Nutritional Counseling.

Menu path: File | Table Maintenance | Configuration

The Configuration window has several tabs across the top of the window. Each tab contains the configurable items for a selected portion of the application.

Tab 1: Organization Defaults: This tab contains your organization's name and address. The entry labeled **Organization Name for Delivery Reports** is used on Delivery Reports for public distribution. Should you not wish your organization name to appear in that situation, you can leave this entry blank, or enter your Phone Number or other identifier.

Tab 2: Configuration: Application Defaults: Settings that affect program performance.

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Default Client Sort Order	Drop-down list	NA	Specify the default sort order for the data. This entry applies to all users of the system, but can be overridden at the individual user level by setting a User Preference sort order. See "Preferred Sort Order", Page 45, for information on setting the individual User Preference.
Income Categories	Drop-down list	NA	This entry determines the entries in the Income Category drop-down list on the Clients screen. Available choices are Low/Medium/High, Above/Below, and Ranges 1-10.
Enable Mapping via	drop-down list	NA	Select the method by which maps will be generated on the Clients screen Map tab. Choices are None, MapQuest, MapPoint. NOTE: Currently only None and MapQuest mapping via the internet are supported. Future versions of MealService may support Microsoft MapPoint 2002 or later.
Mapping URL	Text	250	If MapQuest has been selected as the mapping mechanism, the appropriate URL must be entered in this field. See "Special Instructions for Mapping URLs" following this table for details.
Allow Alternate Addresses	Checkbox	NA	MealService will not allow multiple addresses for a client unless this checkbox is checked.
Truncate Crosstab Labels at	Numeric	NA	Enter a numeric value that will determine how wide the labels on the Kitchen Items Crosstab report will be. Narrower columns will allow more columns to fit on a page.

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Truncate Checklist Labels at	Numeric	NA	Currently non-functional; in a future version, may determine how many characters of the selected checklist item will be stored in the client's record.
Allow re-editing of Client Notes	Checkbox	NA	Normally MealService will not allow a Client Note to be re-edited after it has been posted. Entering a checkmark in this checkbox will allow users to edit Client Notes after the note has been posted.
Postal/Phone Format	Drop-down list	NA	Selections are: United States, Canada, United Kingdom, and All Others . This setting determines system-wide formatting for addresses, phone numbers and other geo-political dependent fields.
Component Visibility	Tree list	NA	This is a 'tree' of nested checkboxes. Clicking on a '+' sign will expand the branch of the tree and clicking a '-' sign collapses the branch. Each of the major branches corresponds to a tab on the Clients screen. A checkmark must be entered in the checkbox for the respective component to be visible on the Clients screen. (See "To hide a component", Page 15 for additional information.) NOTE: after some upgrades this component may not contain any visible entries. If so, right click on the Component Visibility Tree and select Repopulate Component Visibility Tree from the context menu.
System SQL Queries	Button	NA	Clicking this button launches the dialogue for maintaining the System SQL queries. See the "Maintaining System SQL Queries" section following this table for the complete instructions.

Special Instructions for Mapping URLs

For the Map tab, MealService can be configured to use any web-based mapping engine, if that engine supports passing address information as part of the URL. Both MapQuest and Google Maps support such URLs.

As of December 31, 2001, the MapQuest URL is as follows:

```
http://www.mapquest.com/maps/map.adp?country=US&address=XXXX&city=CXXX&state=SXXX&zipcode=ZXXX&homesubmit.x=31&homesubmit.y=16
```

Replace the country=US with Country=CA (for Canada) or Country=UK (for the United Kingdom), as appropriate.

If Google Maps is preferred as the mapping engine, its URL can be used. As of February 16, 2005, the Google Maps URL is as follows:

```
http://maps.google.com/maps?q=XXXX%20CXXX%20SXXX%20ZXXX
```

Should MapQuest change its URL (which happens occasionally), here is the procedure for updating this field:

1. Go to the MapQuest website (<http://www.mapquest.com>) and search for any arbitrary address of your choice. The resulting URL will be displayed in the web-browser's address field.
2. Copy this address and paste it into MealService's **Mapping URL** field. Typically this URL will be quite long and resemble the following:

```
http://www.mapquest.com/maps/map.adp?country=US&address=2100+Market+St&city=Philadelphia&state=PA&zipcode=19103&homesubmit.x=34&homesubmit.y=10
```

3. From the = sign after **&address=** and just prior to the **&** of **&city**, remove all the text and replace it with **AXXX** (in upper case).
4. From the = sign after **&city=** and just prior to the **&** of **&state**, remove all the text and replace it with **CXXX** (in upper case).
5. From the = sign after **&state=** and just prior to the **&** of **&zipcode**, remove all the text and replace it with **SXXX** (in upper case).
6. From the = sign after **&zipcode=** and just prior to the portion of the URL that is not a ZIP code, remove all the text and replace it with **ZXXX** (in upper case).

Maintaining System SQL Queries

Clicking the **Edit Queries** button launches the **Maintain (System) SQL Queries** dialogue.

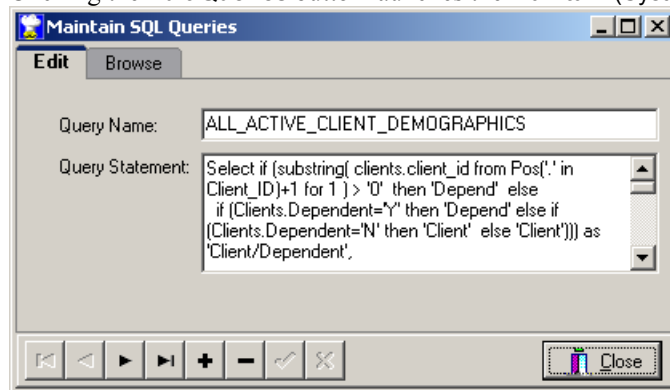


Illustration 25: Maintain System SQL Queries dialogue

This dialogue is used to manage several system-related queries:

- The query to support the New Client Demographics report
- The query utilized to automatically generate a **Unique Record Identifier**
- The auto-executing query statements
- The queries available for use in the Custom Mail-Merge dialogue accessed via the **Reports | Mail-Merge | Custom Mail-Merge** menu. Any query names containing *Select*, *Export* or *Merge* will be visible in the Custom Mail-Merge dialogue.
- The queries available for use in the **Execute Query** dialogue accessed via the **Utilities | Execute Query** menu path. Any queries where the query name contains *Update*, *Delete* or *Select* will be visible in the Execute Query dialogue.

The following system queries are defined, as of MealService build 3.5.9.6555. All system queries *must* be named in upper case:

- ALL_ACTIVE_CLIENT_DEMOGRAPHICS
- EXECUTE_ON_POST *
- EXECUTE_ON_OPEN
- EXECUTE_ON_CLOSE
- NEW_CLIENT_DEMOGRAPHICS
- POPULATE_URN *

Each system query can contain a valid DBISAM SQL *Select* or *Update* statement. The queries marked with * are update queries and *must* include a Person_ID parameter.

Run-time parameters can be assigned to any query used for a Custom Mail-merge or in the Execute Query utility. As the preceding paragraph indicates, a parameter *must* be present in the Execute_On_Post and Populate_URN queries (since they apply to only one client at a time). A parameter is a place-holder in the SQL statement that is replaced, at the time the query is executed, with an appropriate substitution. A parameter is indicated with a colon. For example, in the statement `Update Clients set URN = '123'`

where Person_ID = :Person_ID, the :Person_ID is replaced with an actual Person ID at the time the query is executed. For queries used in the Custom Mail-merge and Execute Query utilities, a parameter can contain spaces within the parameter name, but, if so, the parameter must be enclosed in quotes. For example, `Select * from Deliveri where Deliv_Dt = : "Enter the delivery date"`

Technical support will, in most cases, supply the SQL statements appropriate to your organization's needs at the time of the initial installation of MealService.

NOTE: If the appropriate system table is not present in your MealService installation the **Edit Queries** button remains disabled.

See Also

Automatically generating a Unique Record Number, page 177

Configuring Auto-executing Queries, page 183

Creating a Custom Mail-Merge File, page 135

Execute Query, page 174

Tab 3: Configuration: User-Defined Fields: labels and other data for various User-Defined fields

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Client Services: Application User-Defined Label	Text	25	Enter the value you want to use as a label for the user-defined field on the Client Services tab. For example, if you want the user-defined field to store a hospital name, you might enter "Hospital Name" in this field.
Client Services: User-Defined Application Checklist Items	List of text items	NA	Enter the items you want to populate the user-defined checklist on the Client Services tab application screen. Each line is equivalent to one item in the checklist. To add lines, simply hit Enter after entering each line. NOTE: <ul style="list-style-type: none"> ■ Take care in determining the items, as it is difficult to remove items once the checklist is in use. ■ You can rename items, if they remain in the same position in the list. ■ You can also easily add items to bottom of the list. ■ The first five characters of each selected item are stored in the client's record (to facilitate queries), so those characters should be unique among all of the items. ■ You can define up to a maximum of 31 checklist items.
Biographic: Label for User-Defined Field 1	Text	25	Enter the value you want to use as a label for the first user-defined field on the Biographic Info tab. For example, if you want the user-defined field to store the client's favorite cake flavor, you might enter "Favorite Cake" in this field.
Biographic: Label for User-Defined Field 2	Text	25	Enter the value you want to use as a label for the second user-defined field on the Biographic Info tab.
Biographic: Label for User-Defined Bio Checklist	Text	25	Enter the value you want to use as a label for the user-defined checklist on the Biographic Info tab. For example, if the checklist offers a list of insurance plans, you might enter "Insurance" in this field.

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Biographic: User-Defined Bio Checklist Items	List of text items	NA	<p>Enter the items you want to populate the user-defined checklist on the Client Biographic Info tab. Each line is equivalent to one item in the checklist. To add lines, simply hit Enter after entering each line.</p> <p>NOTE:</p> <ul style="list-style-type: none"> ■ Take care in determining the items, as it is difficult to remove items once the checklist is in use. ■ You can easily rename items, if they remain in the same position in the list. ■ You can also easily add items to bottom of the list. ■ The first five characters of each selected item are stored in the client's record (to facilitate queries), so those characters should be unique among all the items. ■ You can define up to a maximum of 31 checklist items.
Health/Nutrition: Label for User-Defined Checkbox	Text	25	Enter the on-screen label for the user-defined checkbox which appears on the Health/Nutrition tab. Many organizations use the user-defined checkbox to identify clients affected by HIV, so the label might read 'HIV Service Recipient'
Reports: Labels for User-Defined Reports	Text	25	These entries are used to label the menu choices for the five User-Defined reports.

Tab 4: Configuration: Meal Deliveries: Settings that affect the delivery-specific portion of MealService.

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Maximum Diet Modifications allowed	Numeric	NA	Enter the number to which you want to limit available diet choices. For example, if the Maximum Diet Modifications is four, no client may have more than four diet modifications checked at one time. If a user then attempted to create a fifth diet modification he or she would receive a message advising that the fifth modification would not be accepted.
Default City State/ZIP	Text	City: 18 State: 2 ZIP: 10	You may enter the values that will be used as the initial city, state and zip values for every newly created client. If a preponderance of your clients do not come from a single city or state you can leave these entries blank.
Default Service	Drop-down list	NA	Select the default Service that will be used for every newly created client. The list is populated with entries created on the Services screen (Screen 15: Services, Page 31).
Default Diet	Drop-down list	NA	The system assumes that a standard diet is one with no modifications. If your agency assumes the same you can leave this field blank. If, however, every new client were to receive a modification (for example, "Kosher"), that modification may be selected here.
Standard Diet Label	Text	15	You can specify a label for a standard diet (one with no modifications). Otherwise, a standard diet will appear with no label on all reports

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Post Deliveries to Events Table	Checkbox	NA	This determines whether meal deliveries are posted as an event to the Events table. If the organization does not offer Nutritional Counseling or other non-delivery services, (and therefore would not require entries in the Events table for calculating unique client counts across multiple services consumed) a performance improvement may be gained by un-checking this box.
Organization Service Days	Checkboxes	NA	Enter a checkmark (✓) for each day that your agency normally operates. A client's delivery day checkboxes will only be enabled for the days that are checked on this screen.
Set Default Delivery Items	Checkbox	NA	See "Screen 21: Meal Composition / Default Delivery Items", Page 35)
Delivery Advance Preparation Days	Numeric	NA	This entry determines the number of days in the future that the calendar will be set to on the Deliveries Preparation screen. For example, if the Advance Preparation Days entry is four, the calendar on the Deliveries Preparation screen will default to four days in the future every time the screen is displayed.
Flag Special Meals	Checkbox	NA	This will determine whether the dialogue for selecting <i>Special Meals</i> will be displayed each time deliveries are saved. In addition, when checked, the Special Meal flags will appear on the Daily Run reports for those clients who have been identified to receive that day's <i>Special Meal</i> .
Special Meal Label 1 and 2	Text	15	This entry is used to identify the two special meals on Delivery Reports.
Special Meal Abbreviation 1 and 2	Text	2	This abbreviated entry is used to identify the two special meals on Delivery Labels (where space is at a premium).
On Delivery Report Include Line Items	Drop-down list	NA	This entry determines the visibility of line items on the Daily Run sheets: <ul style="list-style-type: none"> ■ All Delivery line items ■ Modifications from the Default Items (for example, if the default delivery is one hot entrée and a client receives two hot entrees, the items would appear) ■ All Diet Modifications (the items appear for every client with other than a standard diet) ■ Selected Meals (only those items that have been assigned to the selected meals will be displayed. See "Screen 12: Meal Items", Page 29, for assigning items to a meal.) ■ No Delivery line items
Meals (unlabeled) drop-down checklist	Drop-down checklist	NA	This is only visible when <i>Selected Meals</i> is chosen in the <i>Include Line Items</i> drop-down list. Using this checklist, enter a checkmark for those meals where that meal's items should be included in the line items on the Daily Run Sheets.
Include Counts of	Drop-down list	NA	Currently non-functional and in reserve for a future use.

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Treat Multiple Deliveries as One	Checkbox	NA	This box determines whether multiple labels will be printed for clients with multiple deliveries. If a Client is receiving both an Ongoing delivery and a Scheduled delivery on the same day, when this box is checked the deliveries will be treated as one delivery and the appropriate number of labels will be generated as if only one delivery were being made; otherwise the deliveries are treated separately and the appropriate number of labels are generated for each delivery.
Delivery Directions Default Font Size	button	NA	Click the button to launch a dialogue in which you can select a font name and size. This font becomes the default font for newly entered delivery directions. Previously entered directions will be unaffected by this setting.
Address Override Description Items	List of text items	NA	Enter the items you want to populate the Address Override drop-down list on the Address Override screen. Each line is equivalent to one item in the list. To add lines, simply hit Enter after entering each line. NOTE: Override Descriptions are not limited to those entered in this list; however, having a list available of the most likely items will simplify data entry.
Months to retain delivery line items	Numeric	NA	This entry determines the number of months that the delivery line item entries should be retained. Since the delivered items are often referred to only for a short time, savings in disk storage space can be achieved by restricting the duration of the retention. Entering a zero in this field will cause all line items to be permanently retained. NOTE: the number of meals that a client received is always retained. This entry only affects the retention of the actual items that were delivered.

Tab 5: Configuration: Nutritional Counseling: Settings that affect the default behavior of the Nutritional Counseling components

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Default Service	Drop-down list	NA	Select the Service to which any client nutritional counseling events entered will default. The items in this list are drawn from the entries defined using the Services screen (Screen 15: Services, Page 31).
Default Counseling Event	Drop-down list	NA	Select the Event to which any client nutritional counseling events entered will default. The items in this list are drawn from the entries defined using the Events screen (Screen 8: Event Types, Page 27).
Default Hours and Sessions	Multiple-entry grid	NA	For each Counseling event listed in this window, enter the default number of hours and sessions. (You can track both the time spent and the number of sessions spent with a client.)
Set Assessment Data Visibility	Button	NA	Click this button to select which health assessment fields will be used in the Health Assessment dialogue. See the “Set Assessment Data: Order and Visibility” section following this table for the complete instructions.

Set Assessment Data: Order and Visibility

Clicking the **Set Assessment Data: Order and Visibility** button launches the **Visible Fields** dialogue.

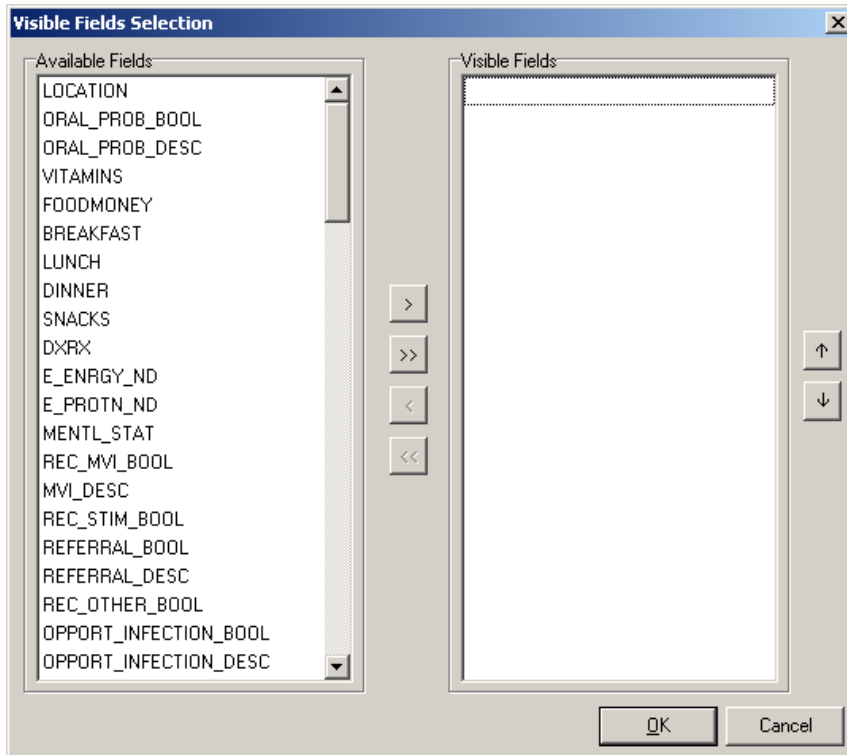


Illustration 26: Visible Fields dialogue

This screen is used to configure which fields are visible in the **Health Assessments** dialogue. It also determines in which order those fields appear in the dialogue. The list box labeled **Available Fields** lists all of the fields available from which to choose. The list box labeled **Visible Fields** displays the fields chosen to be visible, in the order in which they will be displayed in the **Health Assessments** dialogue.

Information can be displayed on each of the choices by clicking on one of the entries in either list to select it, then right-clicking to display the context menu. Choosing **Show Information on Selected** will display the **Field Name** (which is the same as that displayed in the list), the **Field Type** (which can be Character, Numeric, or Boolean [true/false]), the **Field Size** (how many characters can be accommodated) for Character fields, and the **Display Label** (the label that will be visible in the **Health Assessment** dialogue).

≡**TIP**≡ The **Available Fields** list is displayed, by default, in logical order. It can be sorted alphabetically by right-clicking the list to display the context menu and then selecting **Sort List Alphabetically**.

Fields can be added to the Visible Fields list in one of three ways:

- Double-click on a field name in the **Available Fields** list
- Click on a field name in the **Available Fields** list to select it, and then click the **>** button
- Click on a field name in the **Available Fields** list and then drag it to the **Visible Fields** list.

If you wish to make all of the available fields visible, click on the **>>** button.

To remove entries from the **Visible Fields** list, you can use similar steps: by double-clicking, by dragging, or by using the **<** button. To remove all of the visible fields, click on the **<<** button.

Clicking on an entry and dragging it within the **Visible Fields** list changes the order of the **Visible Fields**. A field can also be moved by clicking on it to select it, and then using the '↑' or '↓' buttons to move it up and down within the list.

Once all of the visible fields have been chosen and their order is set as desired, click the **OK** button to close the dialogue and save your work. Click the **Cancel** button to close the dialogue without saving your

changes.

Tab 6: Configuration: Client Services: Settings that affect the default behavior of various Client Services-related components

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Intake Documents by Service	Button	NA	Click the Set Intake Documents button to specify the documents used for each service. See “Screen 19: Application Intake Documents”, Page 33) for the full instructions.
Intake Conditions by Service	Button	NA	Click the Set Intake Conditions button to specify the conditions required for each service. See “Screen 20: Application Intake Conditions”, Page 34) for the full instructions.
Application Denial Reasons	List of text items	NA	Currently non-functional; held for future functionality.
Relationship List Items	List of text items	NA	Enter the items you want to populate the drop-down list of suggested relationships between a client and related individuals on the Client’s Relationships screen. Each line is equivalent to one item in the list. To add lines, simply hit Enter after entering each line. NOTE: Client relationships are not limited to those entered in this list; however, having a list available of the most likely items will simplify data entry.
Income List Items	List of text items	NA	Enter the items you want to populate the user-defined Income Sources checklist on the Client Biographic Info tab. Each line is equivalent to one item in the list. To add lines, simply hit Enter after entering each line. NOTE: <ul style="list-style-type: none"> ■ Take care in determining the items, as it is difficult to remove items once the checklist is in use. ■ You can easily rename items, if they remain in the same position in the list. ■ You can also easily add items to bottom of the list. ■ The first five characters of each selected item are stored in the client’s record (to facilitate queries), so those characters should be unique to each item. ■ You can define up to a maximum of 31 checklist items.

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Note Categories	List of text items	NA	Enter the items you want to populate the drop-down list of suggested Note Categories on the Client's Note screen. Each line is equivalent to one item in the list. To add lines, simply hit Enter after entering each line. NOTE: Note Categories are not limited to those entered in this list; however, having a list available of the most likely items will simplify data entry.
Allow Bypassing Contractual Dates	Checkbox	NA	The system does not normally allow a Start date earlier than a Contractual Start date, nor a Stop Date later than a Contractual Stop date. Entering a checkmark in this box will remove those restrictions. See "Status/Dates tab", Page 53, for information on these dates.
Weeks until Recertification	Numeric	NA	MealService automatically assigns each client a recertification follow-up date upon entry into the system. This date will default to the number of weeks you enter in this field. Enter zero if you want to suppress the functionality entirely. (<i>Recertification</i> is an agency-defined re-application or re-verification process.)
Days Stopped to Become Inactive	Numeric	NA	Enter the default number of days clients should have remained with a Stopped status, after which the system will consider automatically de-activating them.
Limit clients to one Funding Source	Checkbox	NA	Enter a checkmark if your organization's clients should be limited to one funding source per service. If this box is unchecked you will be able to select multiple funding sources for each service.
Funding tabs configuration	Drop-down list	NA	This selection controls which options are visible, and which one is the default option, on the Funding/Billing tab. Selections available are <ul style="list-style-type: none"> ■ Funding Sources default, Pledged visible ■ Funding Sources default, Pledged invisible ■ Pledged Amount default, Funding visible ■ Pledged Amount default, Funding invisible

Tab 7: Configuration: User Preferences: Preferences for the currently signed-in user

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Setting Preferences for User	Display only	NA	This non-editable field displays the name of the user currently signed-in and to whom the settings will apply.
Preferred Sort Order	Drop-down list	NA	Select the sort order to which the Clients should be set after first signing in.
Set Visible Tabs	Checkboxes	NA	Entering a checkmark into the selected boxes will cause only those tabs to be visible. Leaving all boxes unchecked will cause all tabs to be visible.
Preferred Tab	Drop-down list	NA	Select the Clients screen tab which should be chosen after first signing in.
Conserve Windows Resources	Checkbox	NA	Entering a checkmark in this box will cause MealService to conserve Windows resources. This setting is suggested for those running Windows 95, Windows 98 or Windows ME (or anyone who regularly receives the message ' <i>Out of System Resources</i> ')

Field Name	Type	Max. No. Characters	Legal Value/ Comments
Preferred Reports: Delivery Report	Drop-down list	NA	Select the Delivery report that should be automatically chosen when first displaying the Delivery Reports dialogue.
Preferred Reports: Counseling Report	Drop-down list	NA	Select the Counseling report that should be automatically chosen when first displaying the Counseling Reports dialogue.
Preferred Reports: Alerts/Follow-Up Report	Drop-down list	NA	Select the Alerts/Follow-Up report that should be automatically chosen when first displaying the Alerts/Follow-Up Reports dialogue.
Preferred Reports: Agency Report	Drop-down list	NA	Select the Agency report that should be automatically chosen when first displaying the Agency Reports dialogue.

NOTE: If the System Administrator, or other “system-defined” user, is logged in the components on this tab will be disabled and the message “*Preferences are not editable*” will be displayed.

Tab 8: Configuration: System Users: Currently non-functional, this tab may be used in a future version for administering the access rights of all system users or to allow users to modify their profiles. For information about current user maintenance functionality, see the discussion of the **User Maintenance** utility in “Setting Up Users and Assigning Access Levels, Page 13”.

Part 2: Using MealService

Chapter 3: The Client Information Screen

Please note: many of the on-screen components (checklists, edit boxes, drop-down lists, etc.) can be set to be visible or hidden. The following assumes that all of the on-screen components have been set to visible. Also note that the behavior of the address components can change, depending upon which geo-political region has been selected for the **Postal/Phone Format** in the **Configuration** screen. The following assumes the region has been set to the United States.

The tabs on the Clients screen are in the order that they might be used when a client applies for service and progresses through the application process. Therefore, the first tab is the **Client Services** tab, followed by **Biographic Information** and **Relationships** (relationships with other individuals) before moving on to **Service** and **Delivery/Route** information.

A view of the main MealService Client screen appears as follows:

The screenshot shows the MealService Clients application window. The top menu bar includes File, Edit, View, Reports, Utilities, Plug-Ins, and Help. The main form is divided into several sections. The top section contains fields for Meal Status (Inactive), Default Route (FE), Unique Identifier, Organization Client (unchecked), First/Middle/Last Name (Mort, Aloves), Address (2200 Pemberton St), Email, Primary Phone (215-022-0011), City/State/ZIP (Philadelphia, PA, 19146), and Secondary Phone. Below this is a table with columns: App Date, Service, Status, Assigned To, and File Location. The table contains two rows: 12/11/2003, Frozen Meal Service, In Process, Danny Stewart, and 11/1/2002, Fresh Meal Service, Denied, Mary Scott. To the left of the table is a vertical list of tabs: 1. Client Services, 2. Biographic Info, 3. Status/Dates, 4. Relationships, 5. Service/Diet, 6. Funding/Billing, 7. Delivery/Route, 8. Suspensions, 9. Health/Nutrition, and 10. Map. Below the table are sections for Comments, Documents Status, Conditions, and Other Information (User-Defined 1, 2, 3). At the bottom are buttons for Add Application, Delete Application, Request Letters, Search For (LAST_FIRST), Browse, Status Filter, Custom Filter, Add Client, and Exit. The status bar at the bottom right shows System Administrator and the date/time 8/8/2004 7:47:46 AM.

App Date	Service	Status	Assigned To	File Location
12/11/2003	Frozen Meal Service	In Process	Danny Stewart	
11/1/2002	Fresh Meal Service	Denied	Mary Scott	

Illustration 27: Main MealService Client screen

The top of the Client Information screen is common to all of the tabs. The **Status** and **Name** and **Address** portion of the screen appears below:

1020.0	Meal Status: Inactive	Default Route: FE	Unique Identifier: <input type="text"/>
First/Middle/Last Name: Mort	<input type="text"/>	Above	<input type="checkbox"/> Organization Client
2200 Pemberton St	<input type="text"/>	Email: <input type="text"/>	<input type="text"/>
City/State/ZIP: Philadelphia PA 19146	<input type="text"/>	Primary Phone: <input type="text"/>	Primary: <input type="text"/> 215-022-0011
		Secondary Phone: <input type="text"/>	<input type="text"/>

Illustration 28: Client Status and Name and Address information

The components in the name and address illustration are as follows:

Client Identification Number: The **Client Identification Number** (Client ID) is the number within the unlabeled rectangular box at the upper left corner of the screen. The Client ID is assigned sequentially and automatically, when a name in the database is converted to a Client. The digit to the right of the decimal has significance: When it is other than zero it indicates a dependent or affected individual who may be receiving meals but is not a Client (for example, in those organizations where HIV-positive status is required these individuals might be household members who are HIV-negative.) The decision of whether an individual is a dependent, or not, is made at the time the individual is given an identification number and can't be changed after that point (see "Activating a New Client on a Delivery Service", Page 97)

Every name in the database need not have a Client ID, only those individuals who have met the agency admission criteria will have a Client ID. For example, those individuals who have applied for service and have not met the admission criteria might be in the database without IDs. It is possible that at a future time those individuals will meet the agency's criteria, at which time they would be given Client status and assigned an identification number. Non-clients are assigned Client identification numbers using the *Add New Name* functionality.

≧**TIP**≦ All delivery-related controls (Meals Start Date, Day of the Week and Route specifications, Meal Items, Diet Modifications, etc.) are enabled only for Clients.

Meal Status drop-down list: this field indicates the client's meal delivery status. The choices available at any time are dependent upon the client's current status. For example, a newly entered name has only two choices available: **Not Yet Started** and **Wait Listed**. Once the client has been started, additional choices will become available. The choices available, and their significance, are:

- **Active** — this is the only status under which a client can receive deliveries. A client must have an active status in order for many delivery and counseling functions to become enabled. For example, a delivery route could not be assigned to a client who is not active. Active clients for whom deliveries need to be temporarily suspended can have a Service Suspension created for them. See "Service Suspensions tab", on Page 78.
- **Inactive** — This indicates a permanent removal from service. Examples might include the client having moved from the service area or having ceased to meet the service requirements. Some organizations may require the client to submit a new application for a status change from inactive to active status. If a *Recertification Date* option has been configured in MealService, changing a client's status from Inactive to Active will trigger a reminder that the Start and Recertification Dates will need to be reset.
- **Stopped** — This indicates a temporary cessation of deliveries. This differs from a *Suspension* in that a suspension always has a resumption of service date, while a *Stop* may be open-ended. MealService includes a utility (accessed via the **Utilities | Inactivate Stopped Clients** menu) to identify those clients who have been stopped over a designated period of time in order to change their status to Inactive.
- **Not Yet Started** — this status is used when a new name is added to the database, and it is suggested that it be reserved for that use. A new client could be added, for example, who will not be receiving meals but might be receiving other services from the organization.
- **Wait Listed** — this status is used to indicate that an applicant may not currently qualify for service. There is currently no MealService functionality attached to this status, it is for an organization's use only.

NOTES:

The status field only affects those Services identified as *Delivery* services (see the entry on “Service Type” under “Screen 15: Services”, Page 31). It has no impact on other services, such as Counseling.

When a Client is a member of a *Household*, changing his or her status may trigger a confirmation dialogue on migrating the same change to the other Household members. See “Household Member Delivery Details Management”, Page 107, for the details of this feature.

If your organization has the *Recertification* feature enabled (see “Weeks until Recertification”, Page 45, for information on this feature), changing a Client’s status from Inactive to Active will trigger the following reminder: *Please reset the Client’s Start & Recertification Dates* .

Suspended status display box: This non-editable box contains the word **Suspended**, in red, when the client has a suspension currently in effect.

Default Route display box: This non-editable box displays, as a convenience, the client’s default route ID. The client’s default and day-specific routes are edited on the **Delivery/Route Info** tab (see below).

Unique Identifier: This edit box can be used to enter a Funding or State Agency-required identifier. There is a Control-Key combination (**Control+Alt+U**) that can be configured to calculate and enter this identifier automatically. Those instructions follow in this document. (See “Automatically generating a Unique Record Number”, Page 177)

Name and Address information

First, Middle and Last Name: These fields are used to enter the Client’s name.

Organization checkbox: This checkbox is used to indicate that this entry is an organization rather than an individual. **NOTE:** When this checkbox is checked, most biographic entry fields are disabled (since an organization would have no demographics, such as gender, age, etc.)

City/State/ZIP: the cursor will move first to the **ZIP** Code field, where you may enter the ZIP code. Entering a ZIP code that matches one in the U.S. Postal Service ZIP code look-up table (which can be installed from the installation CD) will automatically populate the **City** and **State** fields. The City and State can be over-ridden, if required, however. If the ZIP code is not known, the ellipsis button (...) can be clicked to display the ZIP code lookup dialogue:

ZIP Lookup

Search Characters

ZIP	City	State	County
12345	Somewhere	OK	
12346	Somewhere	OK	
19013	Chester	PA	Delaware
19104	Philadelphia	PA	Philadelphia
19118	Philadelphia	PA	Philadelphia
19136	Philadelphia	PA	Philadelphia
19139	Philadelphia	PA	Philadelphia
19143	Philadelphia	PA	Philadelphia
19147	Philadelphia	PA	Philadelphia
19154	Philadelphia	PA	Philadelphia

Search By

ZIP

OK Cancel

Illustration 29: ZIP Lookup dialogue

Using the lookup dialogue, the ZIP table can be searched, either by ZIP or by City. Select the field on which to search by selecting the appropriate choice from the **Search By** drop-down list.

NOTE: The **Postal** field behavior varies according to the **Postal/Phone Format** setting in the

Configuration screen (See “Postal/Phone Format”, Page 37). Only when the **Postal/Phone Format** setting is United States does the **Postal** field offer lookups. In addition, the formatting of the **Postal** field varies, depending upon the **Postal/Phone Format** setting. The Postal Formats allowed, by region, are:

- **United States:** ##### or #####-####. The dash will be inserted automatically.
- **Canada:** A#A #A#. The space will be inserted automatically. In addition, the first alpha character must be one of the following letters: A,B,C,E,G,H,J,K,L,M,N,P,R,S,T,V,X,Y; the second and third alpha characters must be one of the following letters: A,B,C,E,G,H,J,K,L,M,N,P,R,S,T,V,W,X,Y,Z.
- **United Kingdom:** One to four alpha characters followed (optionally) by up to two digits and one alpha character (i.e., A, A1, A11, A1A, A11A, AA, AA1, AA11, AA1A, AA11A, etc.), a space (inserted automatically), and an optional additional three characters. If the additional characters are entered, they must be in the following format #AA.
- **All Others:** no formatting is enforced.

Email: This field can accommodate the Client’s email address. If there is an email address present, clicking on the button to the right of the field with the envelope icon (✉) will launch an email message addressed to the client. **NOTE:** Launching an email requires that a MAPI-compliant email client be present on the workstation. For example, Microsoft® Outlook® is MAPI-compliant, Outlook Express® is not.

Phone fields: There are two. The first has a drop-down list with a selection of identifiers (such as Primary Phone, Mother’s Phone, etc.) The second telephone number has a free-form identifier field.

NOTE: All telephone numbers in MealService allow numeric entry only and are formatted according to the **Postal/Phone Format** setting in the **Configuration** screen. The telephone formats, by region, are:

- **United States and Canada:** ###-###-#### x#####. The dashes will be inserted automatically, as will the ‘x’ indicating an extension. Currently, only five-digit extensions are accommodated.
- **United Kingdom:** one of three layouts will be allowed — ##### #### or ##### or ### ####. Each will allow a five-digit extension after the primary number (x#####).
- **All Others:** no formatting is applied.

Client Services tab

This tab can be utilized to track client applications to the agency. Items specifically related to an application, such as application status, the status of each document, and the ultimate resolution of the application are all stored here. Some organizations have also defined an Outcomes survey as a Service, thereby being able to track Outcomes on this page.

1. Client Services	App Date 8/13/2004	Service Fresh Meal Service	Status In Process	Assigned To Danny Stewart	File Location
2. Biographic Info	12/11/2003	Frozen Meal Service	Accepted		
3. Status/Dates	Comments Application looks like it's in good shape.				
4. Relationships	Documents Status				
	Application	<input checked="" type="checkbox"/>	1/11/2005	Received fully completed	
5. Service/Diet	Doctor's Form	<input checked="" type="checkbox"/>			
	Client Release	<input type="checkbox"/>			
6. Funding/Billing	Conditions				
7. Delivery/Route					
8. Suspensions	Other Information				
9. Health/Nutrition	<input type="checkbox"/> User-Defined 1	<input type="checkbox"/> User-Defined 2	<input type="checkbox"/> User-Defined 3	This is User-Defined	
10. Map	<input type="button" value="Add Application"/> <input type="button" value="Delete Application"/> <input type="button" value="Request Letters"/> Staff Contact: <input type="text"/>				

Illustration 30: Client Services tab

The information on this tab is very configurable, therefore there is a significant amount of agency thought and configuration that must take place before this tab can be properly used. In order, here are the preparatory steps that must be taken:

1. All documents which might be utilized by the agency in the application process must be defined under **Edit | Table Maintenance | Client Documents** (see “Screen 2: Client Documents”, Page 24)
2. All client conditions that must be met by a client, or with which a client might be affected, must be defined under **Edit | Table Maintenance | Certification Conditions** (see “Screen 1: Conditions for Certification”, Page 23).
3. The documents utilized for application to a specific agency service must be defined on the **Client Services** tab under **Edit | Table Maintenance | Configuration**. (See “Screen 19: Application Intake Documents”, Page 33).
4. The conditions applicable to a specific agency service must be defined on the **Client Services** tab under **Edit | Table Maintenance | Configuration**. (See “Screen 20: Application Intake Conditions”, Page 34).
5. Any user-defined fields must be defined and labeled. See “Configuration: User-Defined Fields: labels and other data”, Page 39, and “Client Services: User-Defined Application Checklist Items”, Page 39, for additional information on these features.

Once the supporting tables have been configured, clicking on the **Add Application** button (at the bottom of the tab) will create a new application, defaulting to the current date. Next, select a service with the drop-down list under the **Service** column. Once the appropriate service has been chosen, click the ✓ button to the right of the grid to confirm your choice and save the application. Saving the application will populate the document and condition grids automatically with the appropriate documents and conditions for the service chosen in the application. The documents and/or conditions can be modified by right-clicking on either grid and displaying the context menu.

The **Application grid** has the following columns and intended uses for each:

App Date: This defaults to the current date, but can be edited as required.

Service: This defines for which agency service the client is applying.

Status: This is a drop-down list, with the following choices, and suggested significance of each:

- **In Process:** This is the status indicating that the application is under active review.
- **Pending:** This indicates that the application is on hold for some reason – perhaps because a document has not yet been received.
- **Accepted:** This indicates that the client has been approved for the service to which he/she applied.
- **Denied:** This indicates that the agency has denied the application for service.
- **Cancelled:** This indicates that the application has been withdrawn from active consideration... perhaps because the client changed his or her mind.

Assigned To: This drop-down list is used to track the staff member who is handling the application. The list is populated with data from the *Staff* table (See “Screen 16: Staff Members”, Page 32.)

File Location: This free-form field can be used to store the physical location of the application (i.e., *On Mary’s desk* or *Filing Cabinet A*, for example).

Comments: This edit box allows for open-ended comments regarding the currently selected application. To facilitate entering longer comments, the edit box can be double-clicked. Doing so will open a larger Comment edit window.

The **Documents grid** has the following columns and intended uses for each. The four columns are unlabeled, from the left they are:

- **Document Name:** This column is populated with all of the documents utilized for an application to this specific service.
- **Check box:** This column can be utilized to indicate that a document has been received.
- **Date:** This column can be utilized to indicate the date that a document was received.
- **Comments:** This column can be utilized for any document-specific comments, such as ‘Client was informed that this form was required from his physician’.

➤**TIP**➤ Right-clicking on **Documents grid** will display the following context menu:

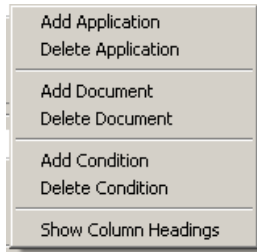


Illustration 31: Application Documents and Conditions context menu

You will notice that additional documents can be added to the current Application, and that documents can be deleted from the Application through this menu. The display order and width of the columns can also be set using the Show Column Headings menu choice. See the next Tip on how to adjust the Documents and Conditions grids.

The **Conditions grid** has the following columns and intended uses for each. The four columns are unlabeled, from the left they are:

- **Condition Name:** This column is populated with all of the conditions utilized for an application to this specific service.
- **Check box:** This column can be utilized to indicate that a condition has been met.
- **Date:** This column can be utilized to indicate the date that a condition was met or verified.
- **Comments:** This column can be utilized for any condition-specific comments.

➤**TIP**➤ Each user can adjust the appearance of the **Documents grid** and/or the **Conditions grid** to their personal preferences. When at least one application exists, the user can reorder the columns, and the column widths can be adjusted, of both grids. (If no applications exist for the current Client, the grids are disabled.) To modify the appearance of the grid, right-click on the appropriate grid and select **Show Column Headings** from the context menu. A checkmark (✓) will appear in front of the context menu entry **Show Column Headings** and the grid's column headings will become visible. The column headings can then be clicked and dragged to a new location in the grid. Clicking on a column heading divider will display a double-headed arrow cursor. Dragging while that cursor is displayed will change the width of the column. After the modifications have been completed, right-click in the grid again and select **Show Column Headings** one more time. The checkmark in front of the menu choice will be cleared and the column headings will return to their normally hidden state.

User-Defined Other Information checklist: This checklist can be populated with the agencies' choice of entries. The list entries are set by selecting **Edit | Table Maintenance | Configuration** from the menu, then selecting the **User-Defined Fields** tab. See "Client Services: User-Defined Application Checklist Items", Page 39, for more information.

User-Defined edit box: The label of this edit box can be changed. To do so, select **Edit | Table Maintenance | Configuration** from the menu, then select the **User-Defined Fields** tab and edit the **Application User-Defined Field Label** entry.

Delete Application button: Clicking this button will delete the currently selected application. This action is irreversible.

Request Letters button: This button currently holds no functionality, and is intended for possible future use.

Staff Contact drop-down list: This can be used to assign the case manager or other staff member responsible for this client.

Biographic Info tab

This tab is used for all client biographic elements, and appears as follows:

1. Client Services	Date of Birth	6/1/1967	Social Security #:	102-11-1234
2. Biographic Info	Gender	Male	Race	Black
	Height	5' 0.	Usual Weight	
3. Status/Dates	Marital Status	Single	Rural	<input type="checkbox"/>
	Household Info	<u>Alove-Apparel Household 2200 Pemberton St</u>		
4. Relationships	Number of Children	1	Receiving	<input type="checkbox"/>
5. Service/Diet	Income Category		Dependent/Caregiver	<input checked="" type="checkbox"/>
6. Funding/Billing	Income per Month		Handicapped/Frail	<input checked="" type="checkbox"/>
7. Delivery/Route	Primary Language	English	Income Sources	<input type="checkbox"/> Social Security <input type="checkbox"/> Private Pension <input type="checkbox"/> Medicare <input type="checkbox"/> Employment <input type="checkbox"/> Roommate
8. Suspensions	This is User-Defined			
9. Health/Nutrition	This is User-Defined			
10. Map	List is User-Defined	<input type="checkbox"/> Mother <input type="checkbox"/> Father <input type="checkbox"/> Son		
	Credit Card Info	4111 1111 1111 1111	02/04	9562
	Insurance Plan / #:	Mort Alove		

Illustration 32: Biographic Info tab

The Race selection is populated with the race data from the *Race* table, the other elements are either free form or are pre-populated pick lists. The height field is entered as feet and inches (6' 9"). **NOTE:** The entry will auto-format, with the foot symbol (') and a space being entered automatically as soon as the first digit is typed. The number of inches must be entered. If a client is six feet tall exactly, enter 6' 0". This entry is the same as appears on the **Health/Nutrition** tab.

If a client has other household members in the client database, you can establish relationships among the household members by using the **Members**, **Households** and **Wizard** buttons. A client who has been added to a **Household** will have the Household Name displayed. The underline indicates that it is a hyper-link. Clicking on the **Household Name** has the same effect as clicking on the **Members** button: the dialogue listing the members of the **Household** will be displayed. See "Managing Households and Household Members", Page 102 and "Using the Household Wizard", Page 111, for complete instructions on creating and managing households and household members.

Status/Dates tab

The Status and Dates tab contains elements related to starting and stopping a client and the client's history with the agency:

Illustration 33: Status/Dates tab

The **Date Added** is generated automatically when a new name is added to the database.

The **Intake Date** is intended to be the date the person becomes a client of the agency.

The **First Service Date** is generated automatically, on the first delivery of a meal or the first nutritional counseling session.

Contractual Start (Date) is used to record the beginning of a funding period imposed on a client by a funding agency, for example where a client will be funded for X months. When a **Contractual Start** date has been entered, a **Meals Start Date** will normally not be allowed prior to the **Contractual Start** Date.

The most important fields on this tab are the **Meals Start Date** and **Meals Stop Date**. A client's meals will not begin until a *Meals Start* date has been entered. Likewise, if a *Meals Stop* date has been entered, the client's meals will stop on that date. If a client had been stopped, and a new start date is subsequently entered, be sure to remove the old *Stop* date, otherwise the client will not be restored to the deliveries list.

Contractual Stop (Date) is the companion field to the **Contractual Start** date. It is used to track when a client has been funded through a specific date. When a *Contractual Stop* date has been entered, normally a client's *Stop Date* can't be set to a date later than the *Contractual Stop* Date.

NOTE: The default behavior of the **Contractual Start** and **Contractual Stop** dates can be overridden. If you would like to be able to enter dates in those fields, but not have restrictions applied to the **Meals Start** and **Meals Stop** dates, please see the **Configuration** entry on "Allow Bypassing Contractual Dates", Page 45.

NOTE: When a Client is a member of a Household, changing the *Meals Start* and/or *Meals Stop* date(s) may trigger a confirmation dialogue regarding migrating the same change to other Household members. See "Household Member Delivery Details Management", Page 107, for the details of this feature.

The system allows for tracking the reason a client has been stopped, you may select one from the drop-down list and/or enter a note in the free-form edit field. **NOTE:** this list is populated with the items in the *Stop Reasons* table. To modify the entries in this list, edit the entries in the *Stop Reasons* table. (See "Screen 17: Stop Reasons", Page .32)

The **Record Missed Delivery** button is used to enter a client's missed delivery. The following dialogue will result:

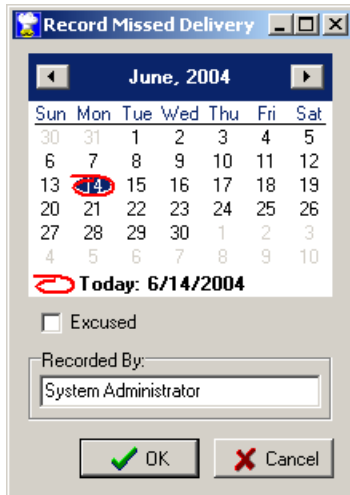


Illustration 34: Record Missed Delivery dialogue

The dialogue will default to the current date, however another date can be chosen from the calendar by clicking on the desired date. The **Excused** checkbox is used to record the fact that the meal was missed but that the client was excused for having missed the meal. Once the correct date has been chosen, click on the **OK** button to save the missed meal information or click the **Cancel** button to exit without saving the missed meal.

If the client did not actually receive a delivery on a date being recorded as missed, a dialogue will be displayed with the following question: *The client did not receive a delivery on that date. Do you want to record it as missed anyway?* Clicking **Yes** will let you record the delivery as missed, even though it did not actually take place on the selected date.

➤**TIP**➤ Double-clicking a date in the **Record Missed Delivery** dialogue is the equivalent of clicking **OK**.

Rather than being entered client by client missed deliveries can also be entered on a batch basis. See "Record Missed Deliveries", on page 163, for information on using the Recording Missed Deliveries utility.

The **Excuse** button is used to excuse a missed delivery, after the fact. Clicking on the button will generate the following dialogue:

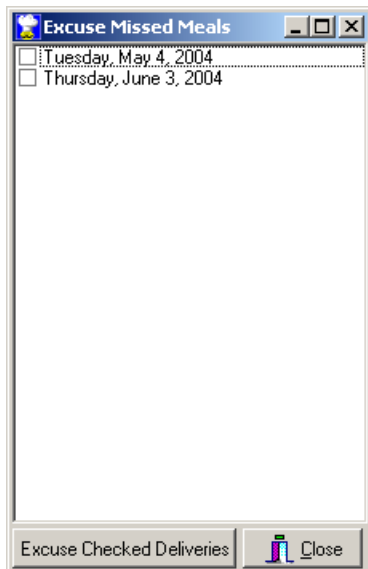


Illustration 35: Excuse Missed Meals dialogue

Any missed deliveries that have not already been excused will be listed. To excuse one, or several deliveries, enter a checkmark into the box(es) and then click the **Excuse Checked Deliveries** button.

The **Delete** button is used to remove the *Missed Delivery* status from a delivery. Any missed deliveries that have not already been deleted will be displayed. To delete one or several deliveries, enter a checkmark (☑) by clicking on the box(es) corresponding to the selected dates and then clicking the **Delete Checked Deliveries** button.

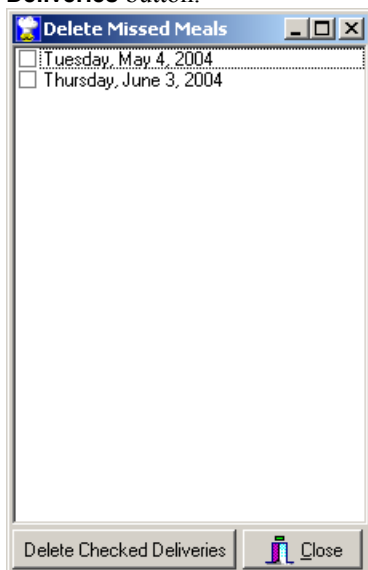


Illustration 36: Delete Missed Meals dialogue

The **View Status History** button will display all of the client's status changes over time, such as the date the record was added to the database, the start date, any stop dates, missed meals, status changes, etc. The **View Status History** button is only enabled if there are, in fact, history records for the client.

Relationships tab

There are two sub-tabs on this page: **Client-Specific Relationships** and **All Individuals**. Client-Specific Relationships are those individuals who have been identified as having a relationship with the currently

selected client. All Individuals are just that, every individual capable of being established in a relationship with a client.

Client-Specific Relationships		All Individuals						
Relationship	Name		Organization	Phone	Referrer	Aware	Emerg Contact	
	First	Last						
▶ Case Worker	Jimmy	Stuart	General Hospital I.D. Clinic	610-044-4444	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	
Next-Door Neighbor	Manny H.	Returns		123-456-7890	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	
Physician	Tony	Curtis	City Limits Holistic Hospital	215-056-7890	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	

1. Client Services

2. Biographic Info

3. Status/Dates

4. Relationships

5. Service/Diet

6. Funding/Billing

7. Delivery/Route

8. Suspensions

9. Health/Nutrition

10. Map

Add Relationship

Edit Relationship

Delete Relationship

Illustration 37: Relationships tab

Client-Specific Relationships

The browse displays a one relationship per line view of all of the relationships for this client.

To add a relationship, click on the **Add Relationship** button towards the bottom of the screen. To edit an existing relationship, either double-click an entry in the browse view, click on the **Edit Relationship** button, or right-click on the browse view and select **Edit Relationship** from the context menu. In either case the following window will result:

Relationship: [dropdown]

Related Individual ID: [text box with search icon]

First / Last Names:

Salutation:

Organization:

Address:

City / State / ZIP:

Phone:

Secondary Phone:

Email:

Additional Info:

Select the related individual by using the 'Related Individual ID' lookup above.

☐ Referral Source

☐ Relation is aware of client's medical status

☐ Emergency Contact

Notes on this relationship

Updated By: System Administrator On: 6/14/2004

OK Cancel

Illustration 38: Relationship screen, with no individual selected

Illustration 39: Relationship screen, with selected individual

If it is a new relationship, the name and address portion of the screen will be blank, as in Illustration 38: Relationship screen, with no individual selected. If editing an existing relationship the fields will be populated, as displayed in Illustration 39: Relationship screen, with selected individual. The fields, and their use, are as follows:

Relationship: This describes the relationship between this individual and the client. Examples include *Father, Parents, Case Manager, Doctor, or Neighbor*. The item will auto-complete if the first few letters typed match an item in the list. You are not restricted to the pre-defined list items, however. You may type any description, as desired, in this field. There is one pre-defined Relationship Type, and that is *Bill-To*. Defining a relationship as Bill-To will cause any mail-merge client invoices to be addressed to the Bill-To individual rather than the client. **NOTE:** the default items in the list can be set by editing the items in the **Relationship List Items** field in the **Configuration** screen on the **Client Services** tab. (See “Relationship List Items”, Page 44)

Related Individual ID: A client’s relationship can only be established with the name of an individual that already exists in the Individuals table. If you know the Identification Number of the individual with whom you want to establish the relationship, type it in this field. Upon exiting the field that individual’s ID number will be used to populate all of the name and address fields appropriately. Otherwise, click on the ellipsis button (‘...’) to the right of the *Individual ID* field to display the **Related Individuals Maintenance** dialogue. Using the **Related Individuals Maintenance** dialogue you’ll be able to search, edit, or add an individual. The **Related Individuals Maintenance** window is described further in this document (See “All Individuals”, Page 61).

First / Last Name: Enter the individual’s first and last names, as appropriate.

Salutation: This field is to be used as a merge field in a letter. Therefore, type the salutation that would normally follow the ‘Dear...’ in a letter. For example, if the First and Last Names are John Smith, MD the salutation might be *Dr. Smith*.

Organization: The individual’s organization, if any. For example, this might be the Case Manager’s

agency or a Doctor's hospital affiliation.

Address: There are two lines for the address.

City/State/ZIP: Entering a ZIP code which matches one in the ZIP code table will cause the city and state fields to be automatically completed with the correct information. If a ZIP code match is not found, however, the City and State can be completed manually.

Phone and Secondary Phone: The drop-down box is to be used for the phone description. The item will auto-complete if the first few letters typed match an item in the list. You are not restricted to the pre-defined list items, however: you may type any description in this field. The telephone number fields will be formatted according to the **Postal/Phone Format** setting in the **Configuration** screen. See "Postal Formats allowed, by region", Page 50 for additional information on this setting.

Email: An email address can be entered in this field. If there is an email address present, clicking on the button to the right of the field with the envelope icon (✉) will launch an email message addressed to the individual. **NOTE:** launching an email requires that a MAPI-compliant email client be present on the workstation.

Referral Source: If this individual was the referral source for this client, enter a check this box by clicking on it.

Relation is aware of client's medical status: If the individual is aware of the client's medical status (as defined by the agency), check the box.

Emergency Contact: If this individual is an emergency contact for this client, check the box.

Notes on this Relationship: Any relevant free-form comments pertaining to this relationship can be entered in this box, as required.

Click the **OK** button to save your changes and be returned to the Client screen, or click the **Cancel** button to be returned to the Client screen without saving your changes.

The **Related Individuals Maintenance** screen is as follows:

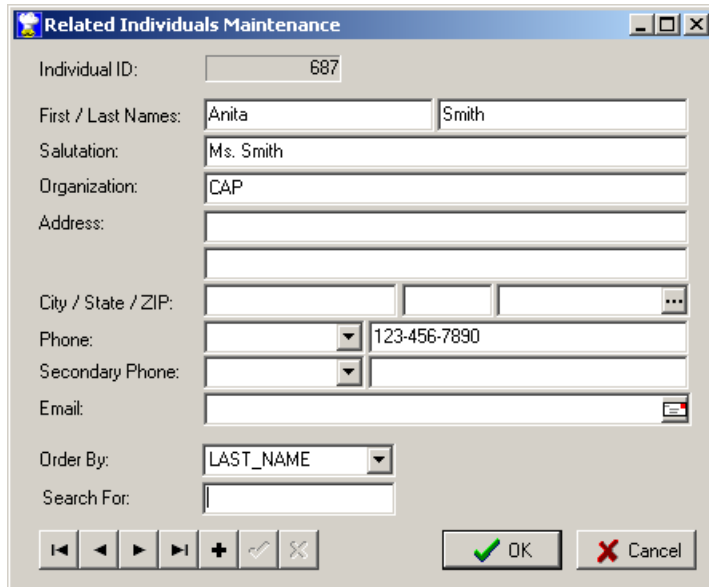


Illustration 40: Related Individuals Maintenance screen

The **Related Individuals Maintenance** screen is used search, navigate and edit the Individuals table. The search order can be modified by using the **Order By** drop-down list. The **Order By** choice sets the active index. The value typed in the **Search For** field will be searched using the active index. As you type, the closest matching entry will be automatically located. For example, if the Last_Name index is selected, typing JO would locate the first individual whose last name begins with JO. (The search is *not* case sensitive. Upper case is used here only for example.)

If the individual for whom you are searching is not found, you may add that individual by clicking on the +

button. Complete the form, as required. The fields have the same labels and uses as on the **Relationship** screen.

➤**TIP**➤ It is always advantageous to search for an individual to make certain that he or she does not exist in the database before adding them as a new name. This is so that, for example, all of the clients managed by a Case Manager can be easily identified. This could only be easily accomplished if the Case Manager had been entered once, rather than many times.

NOTE: Since one individual can have relationships with many clients, keep in mind that any changes to an individual's record will be reflected on *all* of the relationship screens belonging to that individual (that is, the change will be visible for each client who has a relationship with that individual.)

Click the **OK** button to save your changes and be returned to the **Relationship** form, or click the **Cancel** button to be returned to the **Relationship** form without saving your changes.

To delete a relationship, click on the **Delete Relationship** button towards the bottom of the screen or right-click on the browse view and select **Delete Relationship** from the context menu. Deleting a relationship does not delete the individual with whom the relationship existed! For example, you could have a Case Manager who has relationships with two clients. Deleting one of those two Client relationships does not delete the case manager's record.

➤**TIP**➤ If you need to write a letter to one of a Client's related individuals, you can copy the individual's name, address and salutation to the clipboard (from which it can then be pasted into a Word document, for example). To do so, in the browse view, right-click on the individual and then select **Copy Individual Name and Address** from the context menu. The speed-key equivalent of **Control+Alt+I** can also be used to copy the current individual's name and address to the clipboard.

All Individuals

Maintenance of the Individuals table may be performed using the controls on this tab. Keep in mind that any edits to an individual's record will be reflected on all relationships to which that individual has been assigned.

New individuals may be added by clicking on the **Add Individual** button.

➤**TIP**➤ It is always advantageous to search for an individual to make certain that he or she does not exist in the database before adding them as a new name, so as to not cause duplication.

An individual can be edited by clicking on the **Edit Individual** button or by double-clicking on an individual's row in the browse view.

In the browse view, right-clicking on the list of individuals will result in a Context Menu. The choices on the menu are

- **Edit Individual** – This duplicates the functionality of the **Edit Individual** button.
- **Delete Individual** – This duplicates the functionality of the **Delete Individual** button.
- **Copy Individual Name and Address – Ctrl+Alt+I** – This selection will copy the current individual's name, address and salutation to the clipboard.
- **Show Related Clients**

Selecting **Show Related Clients** will generate the following screen:

Clients Related to Tony Curtis, City Limits Holistic Hos...			
First Name	Last Name	Relationship	Person ID
Mort	Alove	Physician	Clients Related to Tony Cur
Don	Apparel	Case Worker	26
Chedda	Cheezer	Doctor	13
Mae	December	Case Worker	16
Benjamin	Franklin	Doctor	3
Ornery	Oldman	Case Worker	15

Print OK

Illustration 41: Clients related to an Individual

This screen displays a listing of all of the clients who are related to this individual, and the respective relationship this individual holds with each client.

➤**TIP**➤ Double-clicking on any client's name in this dialogue will close the dialogue and take you directly to that client's record.

Clicking on the **Delete Individual** button (or selecting it from the *Context Menu*) will delete the individual if he/she has no relationships. Otherwise, the following dialogue will result, informing you of the clients with whom this individual has relationships. Each of the relationships would need to be deleted before the individual could be deleted. Double-clicking on any client's name in this dialogue will close the dialogue and take you immediately to the selected client's record.

Clients Related to Anita Smith, CAP

This individual is related to the following clients, and therefore can't be deleted. Remove these relationships and then this individual can be deleted.

First Name	Last Name	Relationship	Person ID
Guy	Bahler	Case Manager	515
Steve	Biondo	Case Manager	492
Philip	Frank	Case Manager	1142
Albert	Heartfield	Case Manager	368
Jesse	McGuay	Case Manager	389
Tom	Quinn	Case Manager	507
Michael	Romack	Case Manager	548
Christopher	Short	Case Manager	654

Print OK

Illustration 42: Clients related to an Individual

Service/Diet tab

This tab contains information relative to which service(s) the client is subscribed, any diet restrictions, and the items to be delivered. It appears as follows:

1. Client Services
2. Biographic Info
3. Status/Dates
4. Relationships
5. Service/Diet
6. Funding/Billing
7. Delivery/Route
8. Suspensions
9. Health/Nutrition
10. Map

Delivery Services Used

☒ Fresh Meal Service
☐ Frozen Meal Service
☐ Congregate Meals
☐ Grocery Service
☐ Boost
☐ Holiday Dinner

Modify Meal Items

Other Services Used

☐ Nutritional Counseling
☐ Visiting Nurse

Diet Modifications

☐ Vegetarian - VEG
☐ Low Salt - LoSalt
☐ Vegetarian - Veg
☐ Low Potassium - LoPot
☐ Low Acid - LoAcid
☐ Small Portion - Small
☐ Low Spice - LoSpice
☐ Diabetic - Diabetic
☐ No Gravy - NoGrav

Cold Bag Code

Look Up Code

Cuisine

Preferences / Dislikes

Illustration 43: Service/Diet tab

Delivery Services Used buttons: Select the appropriate delivery service, if required. **NOTE:** When 10 or fewer delivery services have been defined the list of delivery services appears as a set of radio buttons. When 11 or more services have been defined the delivery service buttons change to a drop-down list.

NOTE: A client can be subscribed to only one delivery service at a time. If there is a need for a client to be subscribed to more than one service at one time, it's suggested that one of the services be defined as a

Custom service or that you use *Scheduled* deliveries to accommodate the second service. The Services appearing in this list are managed with the Services screen. See “Screen 15: Services”, Page 31, for additional information on managing Services.

Modify Meal Items button: A client will inherit the default delivery items as defined (under Configuration) for the service to which he or she is subscribed. This button will generate a dialogue that allows over-riding the default items. For example, if the default delivery items for Monday are a breakfast, a hot entrée, and a piece of fruit, a particular client could be designated to receive two entrees and two pieces of fruit (or any other combination of available items). See “Set Custom Delivery Items”, Page 64, for additional information on the custom items dialogue. Notice that the label on this button will be in bold if there are custom deliveries for the Client on one or more days. See the illustration:



Illustration 44: Modify Meal Items button, Normal Mode and (in bold) indicating a Customized Delivery

Diet Modifications: The client can be assigned any mix of pre-defined diet modifications. The maximum number of modifications allowed for one client is a configurable item. For example, you may wish to limit each client to no more than six diet modifications. See “Maximum Diet Modifications allowed”, Page 40, for information on configuring this item.

Other Services Used: These checkboxes are informational only, and can be used to track any non-delivery related services, such as Counseling or Volunteering. The entries in this list are managed on the Services screen.

Cold Bag Code: This drop-down list can be used to assign a code for a Client’s Cold Bag (which might be a different code from that of their hot meal). This is typically used at those organizations where one Cold Bag Code might be used to cover several diet modifications. The selections in this drop-down list area managed with the **Cold-Bag Codes** screen. See “Screen 3: Cold Bag Codes”, Page 24, for information on this screen.

Look Up Code: This button can be used to locate the appropriate **Cold Bag Code** for the Client’s specific combination of diets. See “Screen 4: Cold Bag Usage”, Page 24, for additional information on this feature.

Cuisine: A Client can be assigned to a cuisine type, for those organizations that offer more than one menu. The selections in this drop-down list are managed using the **Cuisine** screen. See “Screen 5: Cuisines”, Page 26, for additional information.

Preferences/Dislikes: This is a free-form note field in which a Client’s likes, dislikes, preferences, allergies, etc. can be noted. There is a delivery label on which the Preferences/Dislikes data is included.

NOTE: Since this field consists of free-form data it can’t be counted or summarized into categories.

Set Custom Delivery Items

This dialogue is used to customize a client’s delivery when other than the default items need to be delivered. For example, in the illustration below:

Day	Qty	Item Description	Order
MON	1	Hot Meal	1
MON	1	Fresh Lunch	2

Buttons: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday

Copy from Defaults: Dupe Monday, Selected Day, Entire Week

Inherit Defaults: ☐ Inherit Items

Buttons: Add Item, Delete Item, Clear All, Close

Illustration 45: Set Custom Delivery Items dialogue

the default delivery items for the Client's service on Monday are a Hot Meal and a Fresh Lunch. (The items are grayed-out because the default items can't be edited on this form.) When one or more custom items have been assigned, the form appears as follows:

Day	Qty	Item Description	Order
MON	2	Fresh Lunch	1
MON	1		2

Buttons: Monday, Tuesday, Wednesday, Thursday, Friday, Saturday, Sunday

Copy from Defaults: Dupe Monday, Selected Day, Entire Week

Inherit Defaults: ☐ Inherit Items

Buttons: Add Item, Delete Item, Clear All, Close

Illustration 46: Set Custom Delivery Items dialogue, with items assigned

Note that once you have customized a delivery you are responsible for assigning *all* of the appropriate items to it. For example: if the default delivery consists of a hot meal and you create a custom delivery consisting of a salad, the salad alone will be delivered (it won't be added to the default item of the hot meal, in other words). If it is your intention to deliver a hot meal *and* a salad, you must select both items for this delivery.

The deliveries created on this form are created *by day*. That is, you must specify the exact items on *each and every* delivery day for which the client is to receive a customized delivery. The functionality of the various screen items is as follows:

Monday/Tuesday/Wednesday/Thursday/Friday/Saturday/Sunday buttons: The button with the appearance of being 'pressed' selects the day of the week for which you are specifying a delivery. **NOTE:** some of the day-of-the-week buttons may be disabled, depending upon which days are defined as being normal delivery days in the agency **Configuration** screen.

Dupe Monday: This button can be used to take all of the items assigned to Monday and duplicate them to all of the other days. The items being duplicated are added to any existing items previously assigned to each of the other days.

Copy from the Defaults, Selected Day: If the client were to receive a delivery that differs only slightly from the default, click this button to populate the currently selected day with the default delivery items. The items can then be edited, as necessary by adding to or deleting from the list of items.

Copy from the Defaults, Entire Week: Clicking this button will populate every day of the week with the default items for the respective days. The items can then be edited on a day-by-day basis, as necessary.

Add Item: Use this button to add a new item to the delivery list for the selected day. Clicking the button will create a blank line at the bottom of the list of items (as in Illustration 46). The **Day** column will be populated automatically with the currently selected day (and can't be edited). You can set the **Quantity** column to the appropriate quantity. Click on the ▼ button on the rightmost portion of the **Item** column to display a drop-down list of available items from which to select. Once the quantity and the item have been set appropriately, click on the '✓' button to save the item.

✓: This button saves the changes to a delivery item.

Delete Item: Click on this button to delete the currently selected line in the list of delivery items.

Clear All: Clicking this button will remove *all* items from *every* delivery day for this service.

This window opens to the items defined for the client's current delivery service. It is possible, however, to edit the default delivery items for a different service for this client (for example, if the client alternates between services, or receives periodic scheduled deliveries on a different service). To select a different service, right click on the items grid to display the context menu. There are two selections that can be used to change the service. If you do not know the Service ID for the alternate service, choose **Select Delivery Service from List** from the context menu. The following screen will be displayed:

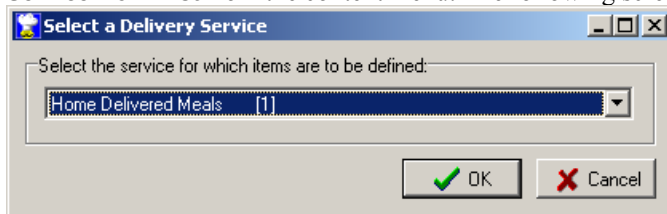


Illustration 47: Select a Delivery Service dialogue

The drop-down box contains a list of the available delivery services from which a selection can be made. Clicking **OK** will close the dialogue and return you to the client's items. The window caption will indicate the service for which items are now being defined (i.e., "Custom Items: Fresh Meal Service").

Notice the number within the square brackets in Illustration 47. That number is the Service ID for the displayed service. Once you know the Service ID for the other services, a faster method to select an alternate service, as long as that service has an ID of one to five, is to choose **Select a Delivery Service** from the context menu, as illustrated below:

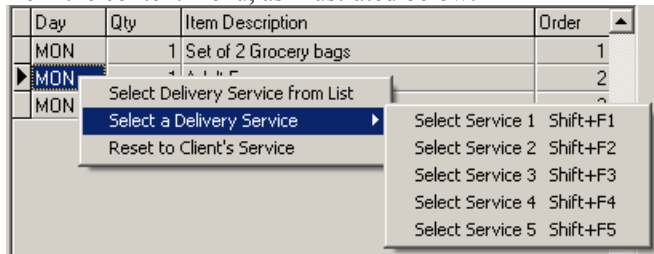


Illustration 48: Select a Delivery Service context menu

Notice that speed-keys exist for each of the service selections numbered one to five. Therefore, the fastest method to select an alternate service would be to use one of the speed key combinations. For example, holding down the Shift key while pressing the F3 function key will automatically select the service with an ID of three.

Funding/Billing tab

The **Funding/Billing** tab is used to assign custom funding sources to a Client, and to track the Client's pledges. There are two sub-tabs on the Funding/Billing tab. One is labeled **Funding** and one is labeled **Pledges**. One or the other can be configured to be hidden, if not used, and one can be configured to be the default tab, if both are used. The configuration of these tabs is managed on the **Configuration** screen. See "Funding tabs configuration", Page 45, for additional information.

Illustration 49: Funding/Billing tab, displaying Funding Sources

Funding

The controls on this tab include:

Set Custom Funding Sources: If a client were to have funding source(s) other than the default funding source for his or her Service, then specific funding could be defined here. **NOTE:** Funding Sources can be assigned to as many Services as desired (in case each service a Client receives is funded by a different source).

TIP If you are assigning a custom funding source, make certain that the service to which the client is subscribed is one of the Services to which a custom funding source has been assigned. For example, if the Client is receiving Hot Meals the funding sources must be defined for Hot Meals.

To create a funding source record to override the default funding, click on the **Add Funding** button. A new row will be created in the Services list, with the Service defaulting to the Client's service (if he/she is on a Delivery service). Click on the ▼ button on the rightmost portion of the column under **Set Custom Funding Sources** to select a different Service from the drop-down list:

Illustration 50: Selecting a Service to which to assign funding

Once the service has been assigned, select the funding source(s) from the list on the right. Any combination of funding sources may be selected, unless your installation of MealService has been configured to only

allow one funding source per Service. See “Limit clients to one Funding Source”, Page 45, for information on configuring the option which allows multiple, or only one, funding source(s) per Service.

Click on the **Delete Selected** button to remove a funded service from the list.

If your only need is to know which Clients are funded by a specific funding source, then you are finished with this screen. However, if the amount of reimbursement varies by Client, or if some Clients are reimbursed on a per-item or per-meal rate, while other Clients are reimbursed per time period, then you should complete the remaining options.

The **Reimbursement is calculated by** drop-down list offers two choices:

- **Time Period** or
- **Meals or Meal Items**

The visible components change, depending upon which of the Reimbursement options is selected. If **Time Period** is chosen, the following screen is displayed to the user:

The screenshot shows a dialog box titled "Set Custom Funding Sources". It has two tabs: "Pledges" and "Funding". The "Pledges" tab is currently selected. Inside the "Pledges" tab, there is a section "Set Custom Funding Sources" which contains a list box with "Fresh Meal Service" selected. To the right of this list is a section "Reimbursement is calculated by" with a dropdown menu showing "Time Period". Below this, there is a section "Set Reimbursement Rates by Time Period" which contains a spin-box for the rate and a dropdown for the period. At the bottom of the "Pledges" tab, there are three buttons: "Add Funding", "Delete Selected", and "Clear All Funding".

Illustration 51: Funding, Reimbursement calculated by Time Period

In this situation, enter a reimbursement rate into the **Set Reimbursement Rate** spin-box, then, in the drop-down list, select the period to which it applies. The periods available are: **Day**, **Month**, and **Year**. For example, you could specify \$2.75 per day or \$35.00 per month.

If **Meals or Meal Items** is chosen, the screen is displayed as follows:

Set Custom Funding Sources

Fresh Meal Service

☒ CHD City Health Department
☐ CTY County Aging Dept

Add Funding Delete Selected Clear All Funding

Reimbursement is calculated by
Meals or Meal Items

Set Specific Item Rates

Item	Amount
Dinners	\$3.00
Lunches	\$2.50

Add Item Rate Delete Item Rate

Illustration 52: Funding, Reimbursement calculated by Meals or Meal Items

In this situation, a grid is displayed with columns labeled **Item** and **Amount**. Clicking the **Add Item Rate** button will add a new line to the grid. You can then click on the ▼ button in the **Item** column to select an item from the drop-down list, and specify a reimbursement amount in the **Amount** column. This process can be repeated as many times as required to add all of the items for the Service selected in the grid above. Since the reimbursement rates are set *By Service*, you could have the same item entered under several services, with different reimbursement rates for each Service.

NOTE: Entering an item without a reimbursement rate is allowed. However, the following informational alert will be displayed after you have created an item with a zero reimbursement rate:

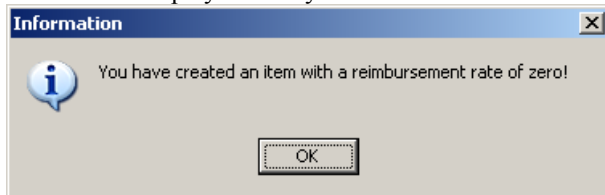


Illustration 53: Alert - Reimbursement rate of zero alert

The **Delete Item Rate** button can be clicked to remove the selected row from the grid of Items.

Pledges

The Pledges tab is used to track Client *pledges*. For example: some organizations will ask a Client to contribute towards the cost of their monthly meals, or ask for pledges towards a specific item (such as nutritional supplements).

The layout of the Pledges tab changes depending upon whether the pledge is by Meal Item or by time period. Both screens will be explained below.

When the Pledge is calculated by Meals or Meal Items the following screen is displayed:

Pledge is calculated by
Meals or Meal Items

Set Pledge for Specific Items

Item	Amount
	\$0.00

Breakfasts Category
Lunches Category
Dinners Category
Snacks Category
Other Category
Medical Food Category
Specialized Medical Food Category
Frozen Breakfast Bag

Add Pledge Item Delete Item

Last Updated
2/1/2002 By: Joe

Illustration 54: Pledges, calculated by Meals or Meal Items

This screen allows tracking pledges by meal categories or specific items. To create a pledge, click the **Add Pledge Item** button. A new, blank, row will be created in the grid labeled **Set Pledge for Specific Items**. The item name defaults to blank, and the **Amount** will default to \$0.00. Clicking on the ▼ button in the **Item** column will reveal a drop-down list, as shown above. Select an item from the list, either a meal category or a specific meal item. Then enter the amount into the **Amount** column. Repeat the process as many times as required to enter all of the Client's pledges.

Click the **Delete Item** button to remove the currently selected item from the grid.

When the **Pledge** is calculated per **Time Period** the following screen is displayed:

Pledge is calculated by
Time Period

Pledged Amount
\$2.50 Per: Day

Add Pledge Item Delete Item

Last Updated
2/1/2002 By: Joe

Illustration 55: Pledges, calculated by Time Period

In this case, enter a **Pledged Amount** in the spin box and select the time period from the **Per** drop-down list. The time period selections are **Day**, **Month**, and **Year**. For example, a Client might have pledged \$5.00 per Month.

Delivery/Route tab

MealService supports two types of deliveries:

- **Ongoing** — where the Client receives deliveries week after week
- **Episodic** — these are calendar-based, where the Client only receives deliveries on specific dates, such as every other Wednesday or the first Monday of the month.

The appearance of the **Delivery/Route** tab changes dramatically depending upon the type of delivery assigned to the Client. Ongoing deliveries will be handled first, followed by Episodic deliveries.

Ongoing Deliveries

The screenshot shows the 'Delivery/Route' tab in a software interface. On the left is a vertical sidebar with 10 numbered tabs: 1. Client Services, 2. Biographic Info, 3. Status/Dates, 4. Relationships, 5. Service/Diet, 6. Funding/Billing, 7. Delivery/Route (selected), 8. Suspensions, 9. Health/Nutrition, and 10. Map. The main area is titled 'DeliveryType' and 'Defaults'. Under 'DeliveryType', 'Ongoing' is selected in a dropdown. Under 'Defaults', 'Route' is set to 'WVC' and 'West City' is displayed. A 'Stop #' dropdown is set to '1'. Below this is a section 'Service Days, Alternate Routes and Stop Numbers' with checkboxes for days of the week: Mon (unchecked), Tue (checked), Wed (unchecked), Thu (checked), Fri (unchecked), Sat (checked), and Sun (unchecked). To the right of these checkboxes are four buttons: 'Edit Routes & Stops' (with a pencil icon), 'Reset Routes' (with a trash icon), 'Reset Stops' (with a trash icon), and 'Address Overrides' (with a magnifying glass icon). Below these buttons is a 'Sched Deliveries' button with a calendar icon. At the bottom of the main area is a 'Directions' text box containing the text: 'Don is *blind* give him extra time to get to the door. DO NOT give meal to the neighbor.' Below the directions box is a 'Cross Street:' label followed by an empty text input field.

Illustration 56: Delivery/Route tab, for Ongoing deliveries

For those clients set to Ongoing deliveries, you may enter any routing and delivery-day information on this tab. The system uses *Routes* and *Stops*. In order to receive deliveries, a Client *must* be assigned to a route. Entering a stop is optional. A *Route* is a collection of deliveries typically handled by one driver. A stop is one drop-off point on that route and it indicates the order in which deliveries are to be made. Several clients can share one stop. For example, a family at the same address could share one stop. If desired, the stops can be formatted with a single decimal position: 9.8, for example. The decimal position can be used to indicate multiple drop-offs at one stop. So, if there were five clients in an apartment house they might be stops 8.0, 8.1, 8.2, 8.3, and 8.4 respectively.

In the box labeled **Defaults** select a default **Route** from the drop-down list, and enter a **Stop**, if desired. The Default Route and Stop applies to every delivery day, unless a day-specific Route and/or Stop have been entered. You may override the default route and stop for a client, on any day of the week, by specifying Alternate Routes and Stops. To do so, click on the **Modify Routes and Stops** button. The **Reset Routes to Default** and **Reset Stops to Default** buttons are used to remove all of the respective modifications for the client. Normally, an alternate route is used for those clients where the delivery address does not change but the route does. Examples might include

- Placing the client on a walk-in route on those days where the client picks up his or her own meals
- Placing a client on a different route for one or two days because the client does not get along with a specific driver.

Address Override button: This will generate a dialogue in which a client can be assigned a delivery address other than his or her normal delivery address. This differs from an *Alternate Route*, in that an alternate route normally uses the client's regular delivery address. Override addresses can be defined for a specific day of the week (for example, every Thursday) or for a specific delivery date (for example, June 12, 2002). A specific delivery date will always take precedence over a day of the week. For example, if a client has an ongoing Thursday day of the week address specified, but a single delivery date address has

also been specified which happens to fall on a Thursday, the single delivery date address is the one which MealService will use. See “Address Overrides”, Page 72.

The appearance of this button changes when a Client has an alternate address valid for a future date. See the following illustration:



Illustration 57: Address Overrides button, Normal mode and (in bold) illustrating an Alternate Address condition

Address Overrides

The Address Overrides screen appears as follows:

Description	Single Date	Ongoing	
		DOW	Expires

Address Description:

Address Override Type:

Single Delivery Date:

Address:

City State Zip:

Phone Description & Phone:

Directions:

Route:

Created By: On:

Illustration 58: Address Overrides screen

The functionality of this dialogue’s components is as follows:

Address Browse Listing: The listing of addresses, one per line, is only for quick navigation among the displayed addresses. No editing can be done in this location... use the appropriate fields below.

Address Description: Use this field to create a descriptive label for this specific alternate address. An example might be ‘Christmas with parents’. While this is a drop-down list, you may enter any description desired. If you wish, you could also select an entry from the list. (See “Address Override Description Items”, Page 42, for instructions on how this list is populated.)

Address Override Type: This drop-down list is used to specify the applicability of the address. The choices are:

- **Ongoing Day-of-the-Week** — an address that is valid for one day of the week, such as every Wednesday.
- **Temporary Address** — an address valid for a specific time period, such as August 1-21, 2005.
- **Single Delivery Date** — an address that is valid for one date only.
- **Mailing address** — this indicates that the address is to be used for mailings. This selection will never

be used for deliveries.

The fields on the next line of the screen will vary depending upon which override type is chosen.

- **Ongoing Day of the Week** is chosen: the next line will let you specify the **Day of the Week** (from a drop-down list) for which this address applies and a **Through** (i.e., expiration) date. For example, you might select Mondays through January 22, 2003.

⇒**TIP**⇐ If no **Through** date is entered then this address will apply until it is removed.

- **Single Delivery Date** is chosen: the next line will let you specify the **Delivery Date** for which this address applies. For example, you might create an address that is valid only on December 25, 2005.
- **Temporary Address** is chosen: you can specify the range of dates for which the address is in effect.

⇒**TIP**⇐ If no **Through** date is entered then this address will apply until it is removed.

In all cases, an address assigned to a **Single Delivery Date** will take precedence over all others. An address assigned to an **Ongoing Day-of-the-Week** will take precedence over a Temporary Address.

Address: Enter the appropriate address lines.

City State Zip: Clicking on the ellipsis button ('...') will generate a dialogue in which you may select a ZIP code. Otherwise, enter the ZIP code, if known, and the **City** and **State** will be populated automatically. The suggested City and State can be typed over, if necessary. **NOTE:** The ZIP lookup functionality only applies when the **Postal/Phone Format** is set to the **United States**. See "Postal Formats allowed, by region", Page 50 for information on postal formats.

Directions: Enter the specific delivery directions for this address. Because the regular directions print on the route sheets, as well, there's no need to repeat any comments related to delivery items. Unlike the font for the client's standard delivery directions, the font for the override directions is not modifiable.

Route: Select the appropriate delivery route. **NOTE:** a Route *must* be chosen.

Add Address button: To create a new Override Address, click this button. It will generate an empty address record, which can then be completed as required.

Duplicate Address button: If the client needs to use the same alternate address more than once, you can select the appropriate address in the browse listing and click the **Duplicate Address** button. The selected address will be duplicated into a new record, and you can then modify the relevant information on the new copy, as appropriate.

Delete Address button: Use this button to delete the currently selected address.

Right-clicking anywhere in this window will generate a Context Menu with the following choices:

- **Add Address** (which has the same functionality as clicking the **Add Address** button)
- **Duplicate Address** (which has the same functionality as clicking the **Duplicate Address** button)
- **Delete Address** (which has the same functionality as clicking the **Delete Address** button)
- **Locate address for specific date** — If a Client has several addresses it may be difficult to identify which one applies to a specific date. Selecting this menu option will generate a dialogue in which you can select a date. If there is an address valid for that date, it will then be selected and positioned for editing. If there is no address valid for that date you will be so informed.
- **Locate address on map** — Selecting this option will generate a window with a MapQuest map displaying the address.
- **Print Delivery Directions** — this will print a *Route Sheet*, for the selected address. You will be prompted for the delivery date, so that any day-specific delivery items can be included.

NOTE: When an alternate address is either created or deleted for a Client who is a member of a Household, a dialogue will be displayed informing you that a similar alternate address may need to be created (or deleted) for the other members of the Household. See "Household Member Delivery Details Management", Page 107, for additional information on the functionality made available when a Client is a member of a Household.

Scheduled Deliveries

Scheduled deliveries are calendar-based deliveries, either in addition to, or in place of, a Client's regular ongoing deliveries. A Scheduled delivery could be used to deliver a birthday cake on the appropriate date, for example. A scheduled delivery can also be used to add an additional delivery on a day of the week for

which a Client did not normally receive deliveries.

The **Scheduled Deliveries** dialogue is launched by clicking the **Sched Deliveries** button. The dialogue appears as follows:

Maintain Scheduled Deliveries for Dahlia Bouquet

Delivery Date	Service	Type	Route	Stop	Specific Items	Created By	Last Updated	Credit
Thu, July 8, 2004	Boost	Delivered	FE	3		System Administrator	7/6/2004 3:31:22 PM	<input checked="" type="checkbox"/>
Wed, December 31, 2003	Fresh Meal Service	Delivered	FE	3	(List)		12/10/2003 9:23:36	<input type="checkbox"/>
Thu, November 27, 2003	Fresh Meal Service	Delivered	FE	3		System Administrator	11/27/2003 5:54:23	<input checked="" type="checkbox"/>

Double-click a date or select a date and press 'Add Delivery' to create scheduled deliveries:

July, 2004							August, 2004							September, 2004							October, 2004						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3	1	2	3	4	5	6	7	5	6	7	8	9	10	11	3	4	5	6	7	8	9
4	5	6	7	8	9	10	8	9	10	11	12	13	14	12	13	14	15	16	17	18	10	11	12	13	14	15	16
11	12	13	14	15	16	17	15	16	17	18	19	20	21	19	20	21	22	23	24	25	17	18	19	20	21	22	23
18	19	20	21	22	23	24	22	23	24	25	26	27	28	26	27	28	29	30			24	25	26	27	28	29	30
25	26	27	28	29	30	31	29	30	31												31	1	2	3	4	5	6

Buttons: Set Delivery Items, Address Overrides, Auto Schedule, Add Delivery, Delete Delivery

☐ Bold calendar dates with deliveries

Close

Illustration 59: Maintain Scheduled Deliveries dialogue

This window serves several functions: it allows the creation and deletion of Scheduled Deliveries. It also allows assigning of specific items to a delivery. The grid, which displays the Client's scheduled deliveries in reverse chronological order, includes the following columns:

Delivery Date — the date for which the delivery will be created

Service — the Service for which the delivery will be created

Type — the type of delivery, whether **Delivered** or **Walk-In**

Route — the Route that this delivery will be assigned to

Stop — the optional Stop on the Route

Specific Items — the items assigned to this delivery. A plus (+) sign will be displayed if there have been custom items assigned. Clicking the + sign will expand the display to reveal the specific items assigned to the delivery.

Created By — the user who created this delivery

Last Updated — the date this delivery was last edited

Credit — A checkmark indicates that this delivery has been *credited* to the Client. A delivery becomes credited when it has been included in a set of prepared deliveries.

A Scheduled delivery can be created in one of two ways:

- Double-click on a date in one of the calendars or
- Click once on one of the calendar's dates and then click the **Add Delivery** button (which will create a delivery for the selected date).

The delivery, when first created, will inherit all of the Client's ongoing defaults: the service, route, and delivery items. Any of those items can be changed by selecting the appropriate delivery in the grid, clicking

in the appropriate column to display a drop-down list, and then selecting a new item from the resulting drop-down list.

To remove a delivery, select the appropriate delivery in the grid and click the **Delete Delivery** button. If the delivery has already been credited to the Client, deleting the delivery will also delete the meal credits associated with the delivery.

Specific items can be assigned to a delivery by clicking on the **Set Delivery Items** button. The resulting dialogue will initially display the default items assigned to this Client for the scheduled delivery's service and day of the week. If no custom items have been assigned to the Client for this day of the week, then the default items for the delivery's service will be displayed.

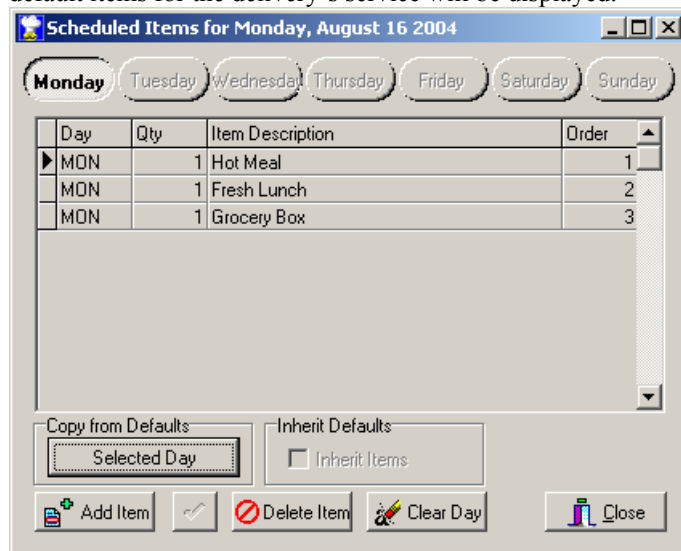


Illustration 60: Custom items for a Scheduled Delivery dialogue

You can assign items to the delivery, one at a time, by clicking the **Add Item** button and then selecting the appropriate item from the drop-down list. Clicking the **Copy from Defaults, Selected Day** will copy all of the displayed default items to this delivery and make the list available for editing.

Items can be removed from the delivery by selecting the appropriate line in the grid and then clicking **Delete Item** or by clicking the **Clear Day** button, which will remove all of the items.

Once the items for a delivery have been customized, only those items that have been specifically assigned will be delivered. That is, the default items for the day in question no longer apply once that day's delivery has been customized with even one item.

This screen has a context menu that offers additional functionality.

Scheduled Deliveries can be created in a batch by using the *Auto-Schedule* feature. The Auto-Schedule feature is accessed by clicking the **Auto Schedule** button. For more information, please see "Creating a batch of Scheduled or Episodic deliveries", Page 114.

When upcoming Scheduled deliveries exist for a Client, the label on the Sched Deliveries button is in bold. See the following illustration:



Illustration 61: Sched(uled) Deliveries button, Normal Mode and (in bold) indicating Upcoming Deliveries

Episodic Deliveries

For those clients set to *Episodic* deliveries, you must select each and every date on which a delivery is to occur. The delivery tab for an Episodic client appears as follows:

The screenshot shows a software interface for managing episodic deliveries. On the left is a sidebar with tabs numbered 1 to 10: 1. Client Services, 2. Biographic Info, 3. Status/Dates, 4. Relationships, 5. Service/Diet, 6. Funding/Billing, 7. Delivery/Route, 8. Suspensions, 9. Health/Nutrition, and 10. Map. The main area is titled 'Delivery/Route' and contains several sections:

- DeliveryType:** A dropdown menu set to 'Episodic'.
- Defaults:** A section with 'Route' set to 'CC' and 'Center City'.
- Stop #:** A numeric input field.
- Scheduled Deliveries:** A table with columns: Delivery Date, Service, Route, Stop, Type, Created By, Last Updated, and Credit. It lists several past deliveries, all marked as 'Delivered'.
- Buttons:** 'Add/Edit Deliveries', 'Delete Selected Delivery', and 'Address Overrides'.
- Directions:** A large text area for entering directions.
- Cross Street:** A text input field.

Delivery Date	Service	Route	Stop	Type	Created By	Last Updated	Credit
Wed, September 1, 2004	Fresh Meal S	CC	0	Delivered	System Administrator (A	8/2/2004 9:13:19 PM	<input type="checkbox"/>
Mon, August 2, 2004	Fresh Meal S	CC	0	Delivered	System Administrator	8/2/2004 8:39:59 PM	<input type="checkbox"/>
Mon, July 5, 2004	Fresh Meal S	CC	0	Delivered	System Administrator	7/5/2004 8:27:11 AM	<input checked="" type="checkbox"/>
Fri, July 18, 2003	Fresh Meal S	CC	0	Delivered	System Administrator	7/17/2003 9:22:15 PM	<input checked="" type="checkbox"/>
Mon, September 30, 2002	Grocery Serv	SC	0	Walk-In	System Administrator	8/26/2002 7:23:45 PM	<input checked="" type="checkbox"/>
Tue, August 27, 2002	Grocery Serv	SC	0	Walk-In	System Administrator	8/8/2002 9:51:48 PM	<input checked="" type="checkbox"/>

Illustration 62: Delivery/Route tab, for Episodic deliveries

As with Ongoing deliveries, each delivery *must* be assigned to a Route and can be assigned an optional Stop. A route is a collection of deliveries typically handled by one driver. A stop is one drop-off point on that route and is intended to indicate the order in which deliveries are to be made. Several clients can share one stop.

To create and manage a Client's delivery dates, click the **Add/Edit Deliveries** button. The resulting dialogue will be displayed:

Maintain Episodic Deliveries for Jeff Bridges

Delivery Date	Service	Type	Route	Stop	Specific Items	Created By	Last Updated	Credit
Mon, July 5, 2004	Fresh Meal Service	Delivered	CC	0		System Administrator	7/5/2004 8:27:11 AM	<input checked="" type="checkbox"/>
Fri, July 18, 2003	Fresh Meal Service	Delivered	CC	0		System Administrator	7/17/2003 9:22:15 PM	<input checked="" type="checkbox"/>
Mon, September 30, 2002	Grocery Service	Walk-In	SC	0		System Administrator	8/26/2002 7:23:45 PM	<input checked="" type="checkbox"/>
Tue, August 27, 2002	Grocery Service	Walk-In	SC	0		System Administrator	8/8/2002 9:51:48 PM	<input checked="" type="checkbox"/>

Double-click a date or select a date and press 'Add Delivery' to create episodic deliveries:

July, 2004							August, 2004							September, 2004							October, 2004						
Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat	Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3	1	2	3	4	5	6	7	12	13	14	15	16	17	18	10	11	12	13	14	15	16
4	5	6	7	8	9	10	8	9	10	11	12	13	14	5	6	7	8	9	10	11	3	4	5	6	7	8	9
11	12	13	14	15	16	17	15	16	17	18	19	20	21	12	13	14	15	16	17	18	17	18	19	20	21	22	23
18	19	20	21	22	23	24	22	23	24	25	26	27	28	19	20	21	22	23	24	25	24	25	26	27	28	29	30
25	26	27	28	29	30	31	29	30	31					26	27	28	29	30			31	1	2	3	4	5	6

☐ Bold calendar dates with deliveries

Illustration 63: Maintain Episodic Deliveries screen

This window serves several functions: it allows the creation and deletion of Episodic Deliveries. It also allows assigning of specific items to a delivery. The grid, which displays the Client's episodic deliveries in reverse chronological order, includes the following columns:

Delivery Date — the date for which the delivery will be created

Service — the Service for which the delivery will be created

Type — the type of delivery, whether **Delivered** or **Walk-In**

Route — the Route that this delivery will be assigned to

Stop — the optional Stop on the Route

Specific Items — the items assigned to this delivery. A plus (+) sign will be displayed if there have been custom items assigned. Clicking the + sign will expand the display to reveal the specific items assigned to the delivery.

Created By — the user who created this delivery

Last Updated — the date this delivery was last edited

Credit — A checkmark indicates that this delivery has been *credited* to the Client. A delivery becomes credited when it has been included in a set of prepared deliveries.

An Episodic delivery can be created in one of two ways:

- Double-click on a date in one of the calendars or
- Click once on one of the calendar's dates and then click the **Add Delivery** button (which will create a delivery for the selected date).

The delivery when first created will inherit all of the Client's ongoing defaults: the service, route, and delivery items. Any of those items can be changed by selecting the appropriate delivery in the grid, clicking in the appropriate column to display a drop-down list, and then selecting a new item from the resulting drop-down list.

To remove a delivery, select the appropriate delivery in the grid and click the **Delete Delivery** button. If the

delivery has already been credited to the Client, deleting the delivery will also delete the meal credits associated with the delivery.

Specific items can be assigned to any delivery. Clicking on the **Set Delivery Items** button will display the following dialogue:

Day	Qty	Item Description	Order
MON	1	Hot Meal	1
MON	1	Fresh Lunch	2
MON	1	Grocery Box	3

Illustration 64: Episodic Items dialogue

You can assign items to the delivery, one at a time, by clicking the **Add Item** button and then selecting the appropriate item from the drop-down list. Clicking the **Copy from Defaults, Selected Day** will copy all of the displayed default items to this delivery and make the list available for editing.

Items can be removed from the delivery by selecting the appropriate line in the grid and then clicking **Delete Item** or by clicking the **Clear Day** button, which will remove all of the items.

Scheduled Deliveries can be created in a batch by using the *Auto-Schedule* feature. The Auto-Schedule dialogue is displayed by clicking on the **Auto Schedule** button. For more information on this feature, please see “Creating a batch of Scheduled or Episodic deliveries”, Page 114.

Delivery directions are common to both *Ongoing* and *Episodic* deliveries. The directions are stored in a *Rich Text* format, which means you have full formatting capabilities. By highlighting any text to be formatted and then right-clicking the mouse you can select any of the formatting options from the context menu, such as **Font**, **Bullet Style**, **Paragraph**, and **Tabs**. Double-clicking in the directions window will open an editor, from which font and other formatting can also be applied by selecting the formatting from a menu.

The **Cross-Street** edit box is also common to both *Ongoing* and *Episodic* deliveries. It is used to store the cross street nearest to the Client’s address. Awareness of the cross-street may be useful when ordering the stops on the Client’s route. The Cross-Street field is visible in the Order Stops by Route utility for this very reason. (See “Order Stops by Route”, on Page 165, for information on this utility.)

Service Suspensions tab

If a client who receives *Ongoing* deliveries needs to be temporarily suspended from deliveries, a suspension may be created. There is no limit to the number of suspensions that a client may have. Clicking the **Add Suspension** button will create a dialogue in which you can click on the first date and then drag to the last date for which deliveries are not required. There are also fields for entering the reason for the suspension and for recording the user who created the suspension.

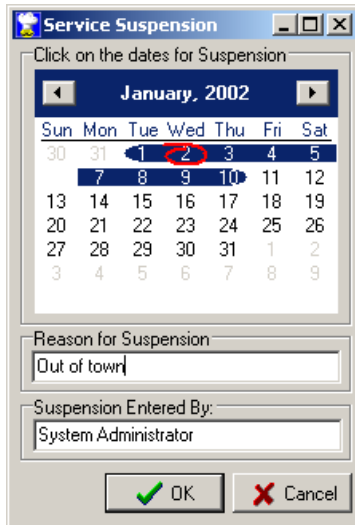


Illustration 65: Service Suspension dialogue

In the example above, the client will be suspended from deliveries from January 1st through January 10th, with deliveries resuming on January 11th.

Click the **OK** button to save the suspension or the **Cancel** button to exit without saving the suspension.

If the Client for whom a Suspension was just created is a member of a Household, a confirmation dialogue will be displayed asking if the same Suspension should be created for the other members of the Household. See “Household Member Delivery Details Management”, Page 107, for the functionality available when making delivery-related changes to a Household Member.

If a Client is currently suspended (that is, the current date falls between any of the suspension dates), the word **Suspended** becomes visible on the top line of the main Client screen, just to the right of the Client’s Status.

Suspensions only effect *Ongoing* clients, and only for regular ongoing deliveries. They have no effect upon a client’s *Scheduled* deliveries. They also can’t be created for those clients who have been assigned to *Episodic* deliveries. If the deliveries for an *Episodic* client needed to be suspended, you could simply delete any deliveries which fall within the desired period.

≧**TIP**≦ That *Suspensions* do not apply to *Scheduled* deliveries can be used to your advantage. If a Client needs to have a delivery delayed by one day, you can create a suspension for their normal delivery and create a *Scheduled* delivery as a temporary delivery. For example: assume a Client receives *Ongoing* deliveries on Monday, Wednesday and Friday. For one week they would like their Wednesday meal to be delivered on Thursday. Simply create a suspension for one day to cover the Wednesday delivery, then create a *Scheduled* delivery for Thursday.

Health/Nutrition tab

There are two sub-tabs on this page: **Health History** and **Counseling Events**.

Health History

The **Health History** tab consists of two primary components: **Client Diseases** and **Health Assessments**. The tab appears as follows:

Illustration 66: Health History tab

The distribution of the height between the **Client Diseases** section on the upper portion of the tab and the **Health/Nutrition Assessments** section on the lower portion of this tab can be adjusted by clicking on the divider-line between the two sections. The divider is the dotted component in the center of the screen:

Illustration 67: Screen divider

While holding the left mouse button down, drag the divider-line up or down to the desired location. If you look closely, you will also see two very small buttons in the divider, with ▲ and ▼ icons. Clicking on one of those buttons will maximize the section of the window in the direction you've chosen. For example, clicking on ▲ will jump the divider to the top, maximizing the **Health/Nutrition Assessments** window.

The components in the upper portion of the screen are as follows:

HIV Status: Select the Client's HIV status from the drop-down list. The available choices are

- **HIV+, not AIDS**
- **HIV+, AIDS status unknown**
- **CDC-defined AIDS**
- **Pediatric AIDS**
- **HIV Negative**
- **Unknown.**

The selections correspond to most Ryan White reporting categories. **NOTE:** The **HIV Status** drop-down list can be configured as hidden, for those organizations that do not deliver to an HIV population. See "Setting Up the Organization Address and other basic Configuration elements", Page 14, for information on hiding screen components.

User-Defined Checkbox: The label for this checkbox, and whether the checkbox should be visible, are both configured by the agency. (See "Setting Up the Organization Address and other basic Configuration elements", Page 14, and "Configuration: User-Defined Fields: labels and other data ", Page 39, for information on how to configure the label and visibility. Many organizations that deliver to an HIV population as well as to other populations use this checkbox to identify the clients and family members who are receiving HIV services.

Mental Health DX: enter a brief mental health diagnosis (up to 50 characters)

Frame Size: Select the Client's frame size from the drop-down list. The choices are **Small**, **Medium**, and **Large**.

Height: Enter the client's height in feet and inches (example: 5' 8"). **NOTE:** The entry will auto-format, with the foot symbol (') and a space being entered automatically as soon as the first digit is typed. The

number of inches must be entered. If a client is six feet tall exactly, enter 6' 0". This entry is the same as appears on the **Biographic Info** tab. It appears here for convenience so that it can be entered along with the other height, frame size, and weight statistics.

Usual Weight: Enter the Client's usual weight. This entry is the same as that which appears on the **Biographic Info** tab.

Ideal Weight: Enter the Client's ideal weight.

The lower portion of this tab displays two grid views. The upper grid, **Client Diseases**, is used to enter (and sort) all of the diseases from which this Client suffers. An unlimited number of diseases can be entered, and the diseases can be rank ordered.

The **Client Disease** grid columns are as follows:

Rank: This is used to sort the diseases in ascending order, perhaps in order of significance or criticality to the Client.

Disease: The disease name, selected from the Disease drop-down list. The entries in this list are created and managed using the **Diseases** screen (see "Screen 7: Diseases", Page 26, for additional information).

Dx Date: Enter the diagnosis date, if desired.

Checkbox (unlabeled): This checkbox can be used as the organization sees fit.

Secondary Conditions: Enter any secondary conditions related to, or caused by, this disease.

Comments/Mobility Factors: Enter any comments, as desired.

Created: This is the date the entry was created, and it is populated automatically.

Updated: This is the date this entry was last edited, and it is populated automatically.

User: This is the User who created this entry, and it is populated automatically.

The buttons below the **Disease** grid are as follows:

Add Disease: Click this button to add a new disease entry. The new entry will appear as a blank line in the disease grid. A disease may then be selected by clicking on the ▼ button in the Disease column.

✓: Click this button save any changes to a disease entry.

↑: Click this button to move the selected disease higher in the list.

↓: Click this button to move the selected disease lower in the list.

Delete Disease: Click this button to delete the selected disease.

In addition to the above buttons, there is a context menu with the following choices:

Move Disease Up (Control+U): this offers the same functionality as the ↑ button.

Move Disease Down (Control+D): this offers the same functionality as the ↓ button.

Delete Disease: this offers the same functionality as the **Delete Disease** button.

Health/Nutrition Assessments allow the tracking over time of up to 80 different nutrition and health fields. The **Health Assessments** screen is a very customizable feature of MealService. The visibility and the ordering of the fields is set in the **Configuration** screen. (See "Set Assessment Data: Order and Visibility", Page 42).

The buttons below the **Health Assessments** grid are as follows:

Add Assessment: Click this button to enter a new assessment.

Edit Assessment: Click this button to edit the assessment currently selected in the Health Assessments grid.

Delete Assessment: Click this button to delete the currently selected assessment.

≧TIP≦ Double-clicking an assessment in the grid has the same effect as clicking **Edit Assessment**: it will be opened for editing.

≧TIP≦ The column widths and the order of the columns in both grids can be set to the individual user's preference. To do so, simply click a column heading and drag it right or left to a new location. Clicking on a column heading divider will display a double-headed arrow cursor. Dragging while that cursor is displayed will change the width of the column. The customization will be remembered automatically.

Counseling Events

This tab is used to track any nutritional counseling sessions. It appears as follows:

Date	Event	Sess	Hours	Location	Comments	Nutritionist

Illustration 68: Counseling Events tab

The **Counseling Events** grid consists of the following columns:

Date: This is the date of the Counseling Event.

Event: This is the description of the event, and is chosen from the **Counseling Events** defined in the **Events** screen. (See “Screen 8: Event Types”, Page 27).

Sess(ions): This is the number of *Sessions* to which the event is equivalent. The organization defines a *Session*.

Hours: This is the number of hours for the Counseling Event.

Location: This is the location of the Counseling Event. This entry is chosen from the entries defined in the **Locations/Dist Centers** screen (See “Screen 10: Locations/Distribution Centers”, Page 28).

Comments: These are comments related to the Counseling Event.

Nutritionist: This is the staff nutritionist who conducted the Counseling Event. The drop-down list is populated with the entries defined as a Nutritionist in the **Staff Members** screen (See “Screen 16: Staff Members”, Page 32).

The buttons below the grid are as follows:

Add Consultation: Clicking the **Add Consultation** button will result in this dialogue:

Add/Edit Counseling Event

Event Date: 1/8/2002
 Event Type:
 Location:
 Number of Sessions: 0
 Number of Hours: 1
 Comments:
 Follow-Up Date:
 Counselor:
 Entered By: System Administrator

Illustration 69: Add/Edit Counseling Events screen

Edit Consultation: Clicking **Edit Consultation** will launch a similar Add/Edit dialogue.

Delete Consultation: Clicking the **Delete Consultation** button will delete the counseling event currently selected in the grid.

➤**TIP**➤ Double-clicking a Counseling Event in the grid has the same effect as clicking **Edit Consultation**: it will be opened for editing.

NOTE: An entry *must* be made for the following fields: **Event Type**, **Location**, and **Counselor** or a message indicating that the screen is incomplete will be generated.

If, on the **Events** Screen, the agency has defined a **Counseling Event** that includes the word ‘group’, when that event type is selected the **Counseling Event** screen will appear as follows. Note the addition of the **Number of Consumers** and **Number of Professionals** fields.

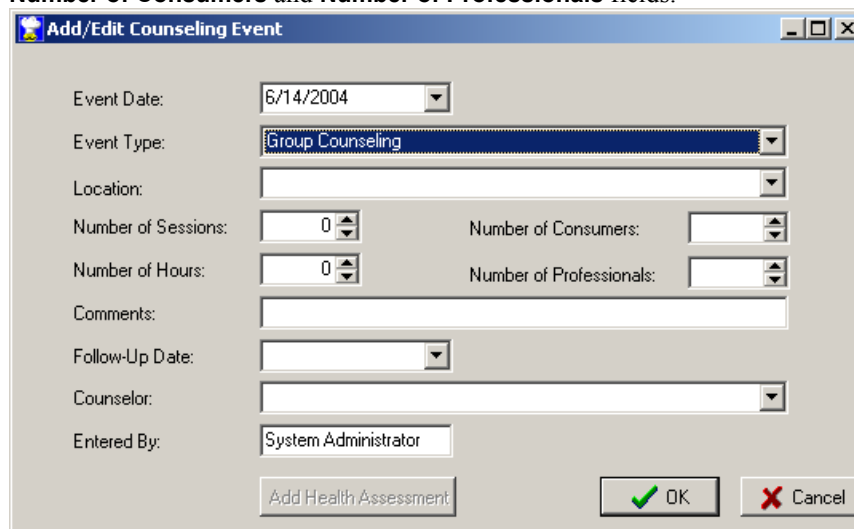


Illustration 70: Add/Edit Counseling Event screen for a Group Event

Map tab

The map tab is used to generate a map of the client’s address. If MapQuest has been configured as the mapping engine, clicking on the **Get Map** button will pass the client’s address, city, state and zip code to MapQuest. MapQuest will then return a map of that address.

Accessing MapQuest requires an internet connection. If your system utilizes a dial-up connection, you may have to wait a minute while your computer utilizes Dial-Up Networking to connect to the internet.

The system must be configured using the **Configuration** screen in order to enable the **Get Map** button. The following two conditions must be met in order for the **Get Map** button to be enabled:

- MapQuest must have been selected as the mapping engine through the **Enable Mapping Via** setting on the **Application Defaults** tab under **Configuration**.
- A URL must have been entered in the **Mapping URL** field on the **Application Defaults** tab under **Configuration**.

See Also

Special Instructions for Mapping URLs, Page 37

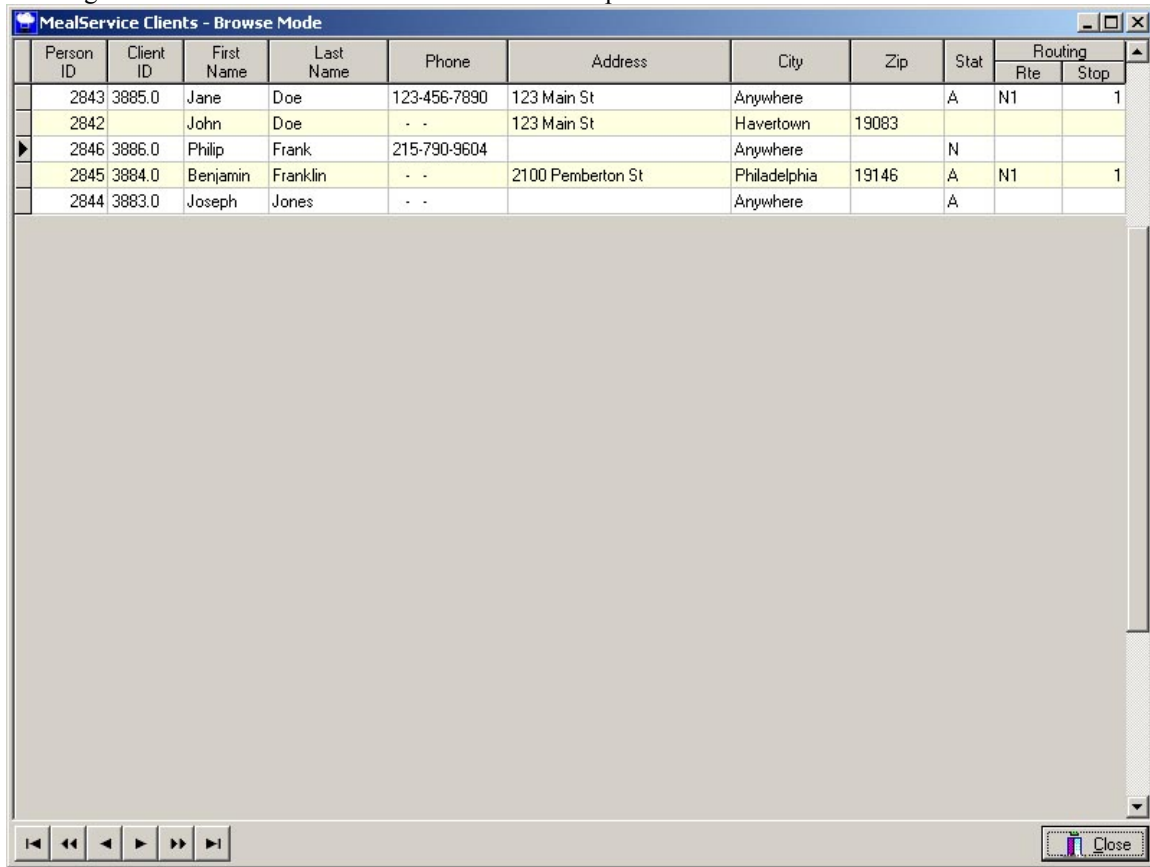
This page intentionally blank.

Chapter 4: Client-Related functionality

Buttons at the bottom of the Client screen

Browse Button

Clicking on the **Browse** button will launch a one-client per line view.



Person ID	Client ID	First Name	Last Name	Phone	Address	City	Zip	Stat	Routing	
									Rte	Stop
2843	3885.0	Jane	Doe	123-456-7890	123 Main St	Anywhere		A	N1	1
2842		John	Doe	- -	123 Main St	Havertown	19083			
2846	3886.0	Philip	Frank	215-790-9604		Anywhere		N		
2845	3884.0	Benjamin	Franklin	- -	2100 Pemberton St	Philadelphia	19146	A	N1	1
2844	3883.0	Joseph	Jones	- -		Anywhere		A		

Illustration 71: Clients Browse view

While on this screen, clicking on any column heading will sort the data by that column *if an index exists* for that field. For example, there is an index on ZIP codes, so clicking on the **Zip** column heading would sort this view by ZIP code.

Name and address information is editable while in this view by clicking on a cell and then hitting the enter key. Cells related to identification numbers, status, and routing are *not* editable.

Right-clicking the grid will display a context menu on which one of the choices is **Export Data**. Selecting **that menu choice** will display a dialogue in which you can choose the type of export file to create. The choices are **Delimited Text**, **Sylk (for export to Excel)**, and **HTML**.

Double-clicking on a row in the grid will return you to the normal one-client edit screen, with the Client whose row was double-clicked displayed.

Status Filter Button

Clicking the **Status Filter** button will launch the **Filter-View** dialogue, in which the view can be limited by

clients' status and suspension status. Select the status to which limit the view to, and click the **OK** button.

The status panel on the bottom of the Clients screen will update to reflect the current filter. Under normal conditions the status panel will say *Filter: Off*. It will change to reflect the current filter, such as *Filter: Active/Suspended*.

To remove a filter, launch the Filter dialogue, leave the choices as *Status: All Regardless* and *Suspension Status: All Regardless* and click the **OK** button.

NOTE: Suspension Status will only be applied to the filter if the Status choice is Active.

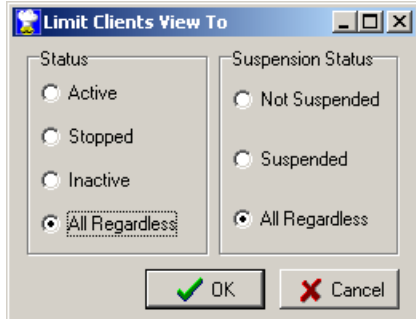


Illustration 72: Clients Status Filter dialogue

△ It is strongly suggested that the Status Filter not be used during operations in which the Client's status is then changed. For example, do not filter on Active status and then change the status of the filtered clients to something other than Active. In such a situation, the Client record which had just been edited will disappear from view, causing the relevant History records to possibly be recorded for the wrong client.

Custom Filter Button

Clicking the **Custom Filter** button will display the **Filter Client Data** dialogue. The Custom Filter allows you to filter on virtually any combination of fields in the Clients table. The dialogue allows you to select the Client fields on which to filter, and the filter value to apply to the selected fields:

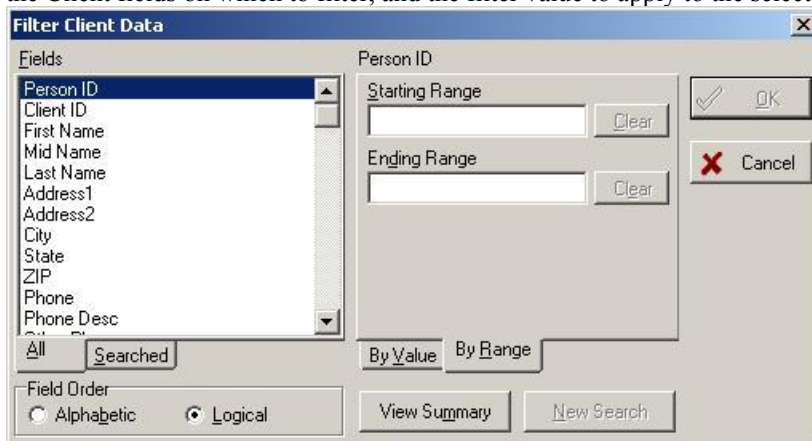


Illustration 73: Custom Filter dialogue, showing available fields

On the left side of the dialogue are all of the fields available in the Clients table. The right side of the dialogue is used to enter specific filtering criteria for the field that has been selected on the left side of the dialogue. So, for example, to filter on a ZIP code, scroll down the list of fields on the left until you see ZIP. Select the ZIP field, and in the *Field Value* edit box on the right type the value on which you wish to filter.

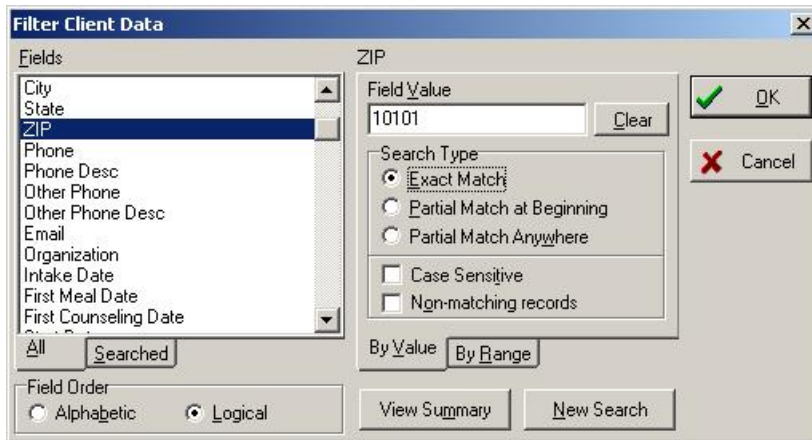


Illustration 74: Custom Filter dialogue, illustrating a filtered value

There are multiple ways to filter on a field: Numeric fields can be filtered on a range of values, for example. Character (alphabetic) fields can be filtered for exact matches or partial matches. Character field filters can be set to be case sensitive, or not. They can also be set to non-matches, rather than matches.

Additional fields can be added to the filter by scrolling through the list of fields, on the left, and selecting the additional field followed by entering a filter value for that field on the right. The fields that have been added to the filter can be viewed, at any time, by selecting the **Searched** tab (at the bottom of the list of fields):

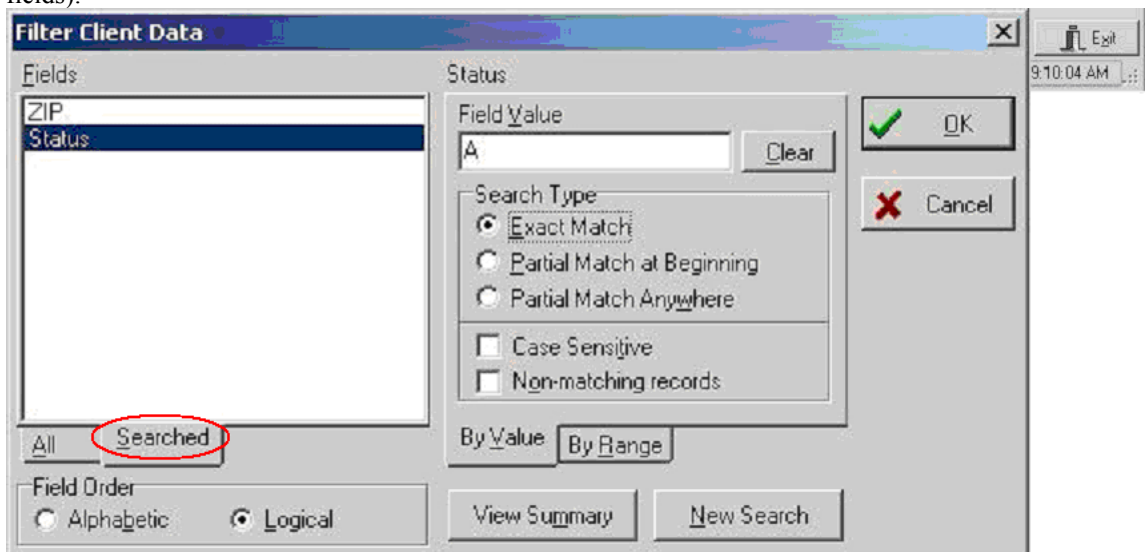


Illustration 75: Custom Filter dialogue, displaying the Searched Fields tab

Once all of the necessary fields have been added to the filter, click the **OK** button. This will apply the filter and close the dialogue, and only those Clients who meet the filter conditions will be visible in the main Client screen. The status bar at the bottom of the screen will now reflect that a Custom Filter is in effect with the notation *Filter: Custom*:



Illustration 76: Status bar, displaying the Custom Filter status

To clear the filter, click the **Custom Filter** button one more time. The filter dialogue will be displayed, and since a filter is currently in effect, it will automatically be displayed showing the fields on which filters have been set (that is, the **Searched** tab will be the one selected):

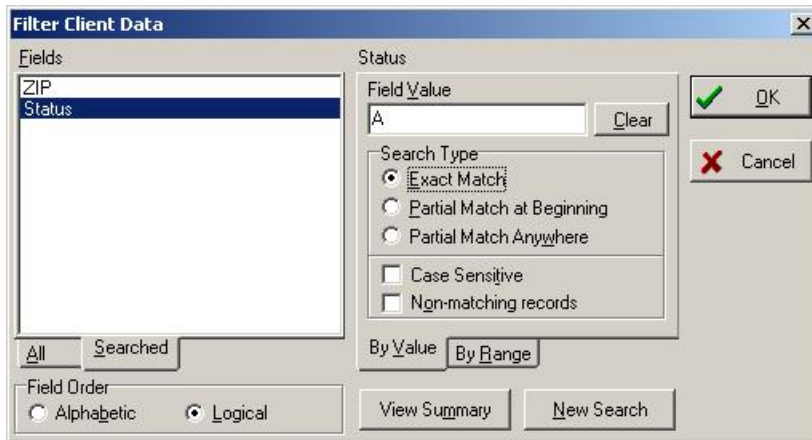


Illustration 77: Custom Filter dialogue, displaying the Searched Fields tab

To remove the filter, click on one of the field names in the list on the left. Then click the **Clear** button on the right to remove any filter value for that field. Repeat this process for all of the fields in the list on the left. Once all of the values have been cleared, click the **OK** button. Doing so will close the dialogue and remove the custom filter, as indicated by the Filter Status bar on the main Client screen, which will indicate *Filter: Off*.



Illustration 78: Status bar, displaying the inactive Custom Filter

NOTE: Depending upon the speed of the server, the complexity of the filter and the number of matching records, it may take several seconds for both the filter to be applied and for it to be cleared.

Add Client Button

Clicking the **Add Client** button will launch the **Add New Client** dialogue. See “Adding a new name to the database”, Page 95, for instructions on the use of this dialogue. **NOTE:** the same functionality can be accessed via the **Edit | Add new person** menu choice.

Client-Related Information Accessed only through the Menu

Print Screen

Accessed through the menu **File | Print | Screen**, this will send a literal image of the MealService screen to the printer.

Print Delivery Directions

Accessed through the **File | Print | Delivery Directions** menu path (or by using the speed-key combination of **Control+D**), this report is a ‘single-Client’ version of a Daily Run sheet. Upon selecting this report you will be prompted for a date. This is so any day- and date-specific items can be included in the report. There are two versions of the single-Client Delivery Directions report: with and without delivery line items. The report template named *OneClientDeliveryDirections040415.rtm* includes the line items. If that template is not found, then the template named *OneClientDeliveryDirections040406.rtm*, which does not include the line items, is used. If you do not want the line items, delete or rename the *OneClientDeliveryDirections040415.rtm* file.

Print All on this Client

Accessed through the menu **File | Print | All on this Client**, this will generate a report that includes all information on the client on the screen at the time (diet, delivery items, notes, relationships, etc.). This report can *only* be sent to the printer.

Print Health/Nutrition History

Accessed through the menu **File | Print | Health/Nutrition History**. This report can also be accessed from the **Print Report** button on the **Health/Nutrition** tab.

NOTE: Since the Health and Nutrition fields can be customized by the agency, this report will most likely need to be modified to properly reflect the data that your organization actually tracks on each client.

Client Notes

Extensive notes can be entered for any Client in the database. Once the appropriate individual is on-screen, select **Edit | Edit Notes** from the menu, or use the speed-key combination of **Control+N**. You will be presented with a window showing all of the existing notes, in reverse chronological order, as illustrated:

The screenshot shows a window titled "Notes on Chedda Cheezer". It contains a table with the following data:

Date	User	Category	Note	Follow-Up
10/6/2003	System Administrator		Chedda called to see if we could increase the portion size for Stilton and Velveeta.	
9/20/2003	Danny Stewart		Intake performed by Danny. Client is a 60-year old white female, with two adult children living with her. Edited 8/3/2004 by System Administrator	

Below the table, there are controls for filtering and managing notes:

- Add Note** button
- Edit Note** button
- Limit Notes to this Category:** (with a drop-down menu)
- Refresh** button
- Close** button (with a red X icon)

Illustration 79: Client Notes screen

The buttons and controls on the bottom of the window are labeled **Add Note**, **Edit Note**, **Limit Notes to this Category** (drop-down list), **Refresh**, and **Close**.

The **Limit Notes** functionality allows you to limit the visible notes to those whose category matches the value you filter on. To filter the notes, type a value into the drop-down edit field, or select an entry from the drop-down list (you are not restricted to the entries in the drop-down list). Clicking the **Refresh** button will apply the filter and restrict the notes to those where the *Category* begins with the value you entered. To remove the filter, remove the entry in the drop-down list and click **Refresh** a second time.

You can add a new note by clicking the **Add Note** button or edit an existing note by selecting the appropriate note in the grid and then clicking the **Edit Note** button. In either case the following **Edit Note** dialogue is displayed:

Illustration 80: Edit Note dialogue

You can type the note directly into this window or you can cut and paste any text from other documents. Entire documents can even be pasted into this window. A Microsoft Word document, for example, would retain its formatting when its contents are pasted into the Note window.

The **Category** drop-down list can be used to assign a Category to the note. Adding categories to notes facilitates locating specific notes when a Client may have many notes attached to his record. You can type directly into the Category edit field, or you can select an entry from the drop-down list (you are not restricted to the entries in the list, in other words).

Clicking the **Set Alert** button will change the display of the **Edit Note** window to the following:

Staff Member	Responsibility

Illustration 81: Edit Note dialogue, with Alert added

This option lets you assign a follow-up date to this Note. Notice that there is now a **Recipients** grid (with

columns labeled **Staff Member** and **Responsibility**) and the following additional edit fields:

Department drop-down list — This entry allows you to assign the follow-up to a department as a whole, rather than to a specific individual. You can type the name of a department, or select an entry from the drop-down list (in other words, you are not restricted to the entries in the list). The list will auto-populate. If you type a new entry, it will be added to the list automatically.

Subject edit field — you may type a brief (up to 50 characters) subject line that will be used in reports and browse views.

Priority drop-down list — the choices are **Low**, **Normal**, **High**. Select the appropriate priority, if desired.

NOTE: You must decide the relevance of each of the priority selections.

Alert Date/Time edit field — You may type a date, followed by an optional time, on which you would like to be reminded to follow-up. The date and time will auto-format based upon your regional Windows settings.

Status drop-down list — the choices are **Not Started**, **In Progress**, **Completed**, **Deferred**. Select the status, as desired.

To add **Recipients** to the follow-up, click the **Add Recipient** button. Clicking the **Add Recipient** button will add a line to the list of **Recipients** in the grid. The first recipient added to the list should default to the current user logged-into MealService. If desired the recipient name can be changed by selecting a different user from the drop-down list. The **Responsibility** can be assigned by selecting an entry from the **Responsibility** drop-down list. The choices are **Owner**, **Delegated To**, **Carbon Copy**. Additional recipients can be added by clicking the **Add Recipient** button as many times as required. Notes that have had a follow-up date attached to them can be managed in the **Edit Alerts and Follow-Ups** screen. The **Edit Alerts and Follow-Ups** screen can be accessed from the **Edit** menu (or by using the speed-key combination of **Control+F**).

NOTE: Only a Recipient with a Responsibility Level of **Owner** or the **Creator** of a follow-up can subsequently edit the Follow-Up.

If you are satisfied with the note, click the **OK** button to save the changes and close the dialogue, otherwise click the **Cancel** button to close the dialogue without saving your work. **NOTE:** When a Note has had a follow-up attached to it, the **OK** button will not become enabled until the follow-up date has been entered.

NOTE: Depending upon the configuration of your MealService installation, it's possible that Notes cannot be edited once you have clicked **OK**. This is by design. If you made an error, post another note indicating what the correct message should have been. If your system is configured to allow re-editing of notes, the system will automatically append the line *Edited <Current Date> by <User Name>* to the bottom of a note each time it has been re-edited.

See Also

Creating and Managing Alerts and Follow-Ups, Page 130

Allow re-editing of Client Notes, Page 37

Client Pop-Ups

Client Pop-Ups are a very visible reminder that a certain critical condition applies to a particular Client. For example, a pop-up might be used to remind MealService users that a Client is deaf or blind. The pop-up is displayed automatically (and can not be hidden) for any client who has had a pop-up attached to their record:

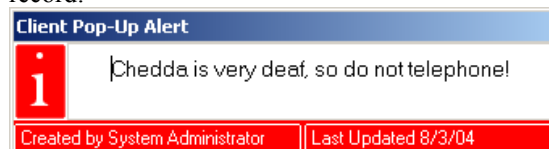


Illustration 82: Client Pop-Up

While the pop-up can't be hidden, clicking once anywhere on the pop-up will turn off the flashing 'i' (I for Information). Clicking the window again will restore the 'i' to flashing mode.

To create a pop-up, select **Edit | Client Pop-Ups | Add Client Pop-Up** from the main menu (or use the speed-key combination of **Control+Alt+P**) to display the following dialogue:

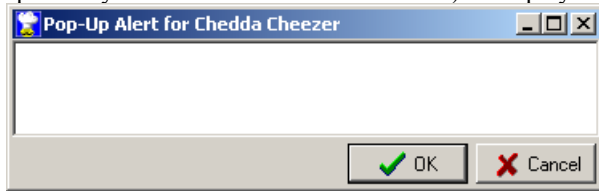


Illustration 83: Edit Client Pop-Up dialogue

You may enter a brief description of the condition for which to be reminded, and then click **OK** to save the changes or click **Cancel** to close the dialogue without saving the changes.

When a Client has an existing Pop-Up, the main menu will display **Edit** (rather than Add) **Client Pop-Up**.

To delete a Client Pop-Up, select **Edit | Client Pop-Ups | Delete Client Pop-Up** from the main menu. The pop-up will be deleted once you confirm the deletion.

View System History

The **System History** can be viewed by selecting **View | System History** from the main menu. The System History dialogue will be displayed, as follows:

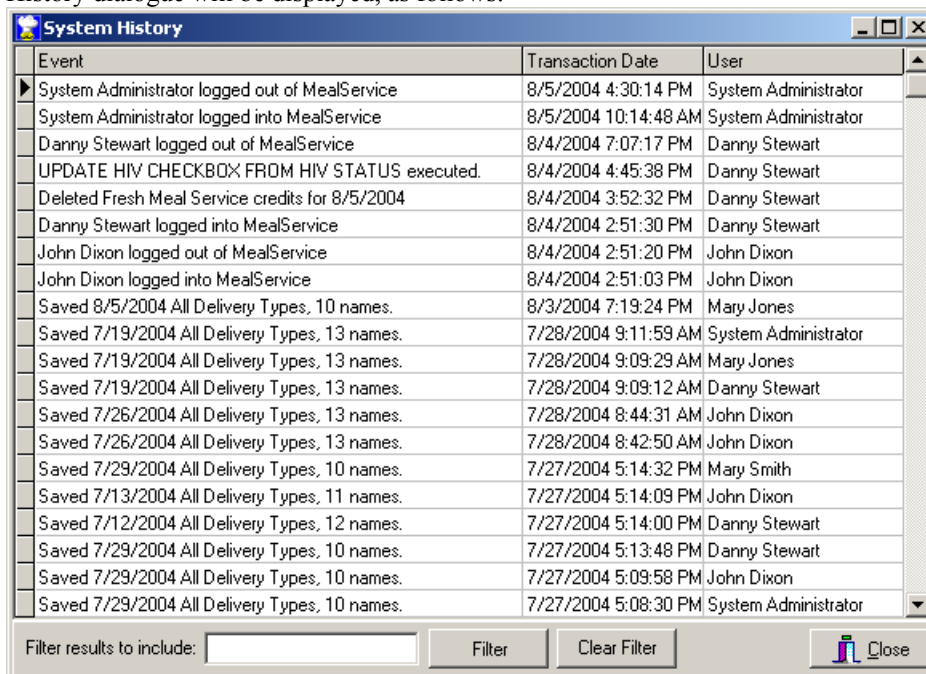


Illustration 84: System History

System History consists of MealService system related events that have been logged to the History table. Events such as a user logging into or out of MealService, saving delivery data, deleting a Client, deleting a delivery, deleting a Client pop-up, etc. are automatically saved to History. This screen can be used to recreate a sequence of events, such as identifying when the delivery data for a specific date might have been saved.

Since the History file can grow to be quite large, the events can be filtered by typing an entry into the **Filter results to include:** edit box and then clicking the **Filter** button. The filter is case-insensitive and will match what is typed anywhere in the **Event** title. For example, filtering on “logged” would find all matches to

when users logged into or logged out of MealService.

To clear a filter, click on the **Clear Filter** button.

Contact Summary

The **Contact Summary** is a summarized view of contacts with a Client. The Contact Summary can be displayed by selecting **View | Contact Summary** from the main menu. The screen appears as follows:

Current Period Starting Date: 8/11/2003	
Deliveries	
Current Period:	17
Total To Date:	25
Health Assessments	
Current Period:	1
Total To Date:	2
Counseling Events	
Current Period:	1
Total To Date:	3
Phone Calls	
Current Period:	
Total To Date:	

Illustration 85: Client Contact Summary screen

The **Contact Summary** has a date drop-down box labeled **Current Period Starting Date**. When the screen is first displayed the date defaults to a date one year in the past, but a new date can be chosen as desired. Changing the date will cause the counts to be updated automatically.

The **Contact Summary** will display counts of four types of contact events, subtotaled by two periods: the **Current Period** (as defined by the Current Period Starting Date) and **Total to Date**. The events that are summarized include:

- **Deliveries** – each delivery event is counted. If a client had received both an ongoing delivery and an episodic delivery on the same date both would be counted.
- **Health Assessments** – the number of Assessments is counted.
- **Counseling Events** – the number of Sessions is summed.
- **Phone Calls** – MealService does not have a specific facility for logging telephone calls. This screen counts any Client Notes that have *Phone* or *Phn* or *Call* appearing anywhere in the Category field.

Context Menus

Context menus are dynamic, and change depending upon which screen item is right-clicked. The Client edit screen has several context menus. Applications, Suspensions, Client Diseases, Individuals and Relations each have their own context menu, which are discussed in the respective sections. The remainder of the Client screen uses the following context menu:

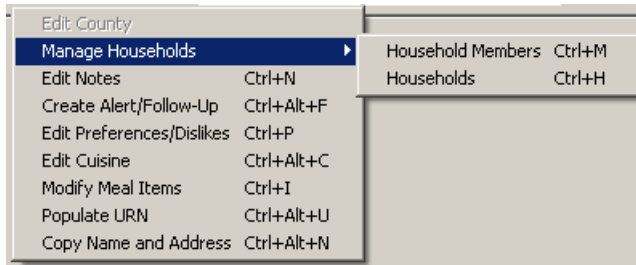


Illustration 86: Client Screen Context Menu

Each of the context selections is covered in the appropriate respective paragraphs. Edit Notes, for example, is discussed in the Notes section (see “Client Notes”, Page 89). The one context selection that is not covered elsewhere is the Copy Name and Address. Selection, which will be covered here.

Copy Name and Address, or the speed-key equivalent of **Control+Alt+N**, will copy the current Client’s complete name and address to the clipboard. This will then give you the ability to paste the contents of the clipboard into another document. A letter to a client in a Word document, for example.

≡TIPS≡ and General Information

- Due to screen size limitations, some fields are not labeled. If you pause your mouse on any field for a few seconds a pop-up label will identify the field for you.
- The system will allow congregate meal sites and other agencies to be entered as if they are a client. The organization checkbox is intended to identify those organizations. Demographic fields become disabled for records where the organization checkbox is checked, since organizations don’t have individually identified demographics.
- If a change is made to the data that would normally result in a certain field being enabled, but that field does not become enabled as expected, it may be necessary to save the changes before the system will recognize that a change has been made. Click the ‘✓’ button or press **Alt+S** to save your changes.

Chapter 5: Client Management Activities

How to Search and Navigate Client Records

There is a drop-down list that allows you to set the field on which you want to search. Adjacent to it is the entry field into which you can type the value for which you want to search. As you type, the system will find the first available match, if any. See Illustration 87.

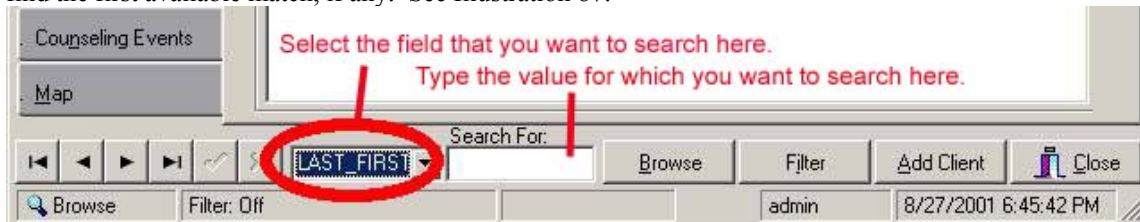


Illustration 87: Search options portion of the main Client screen

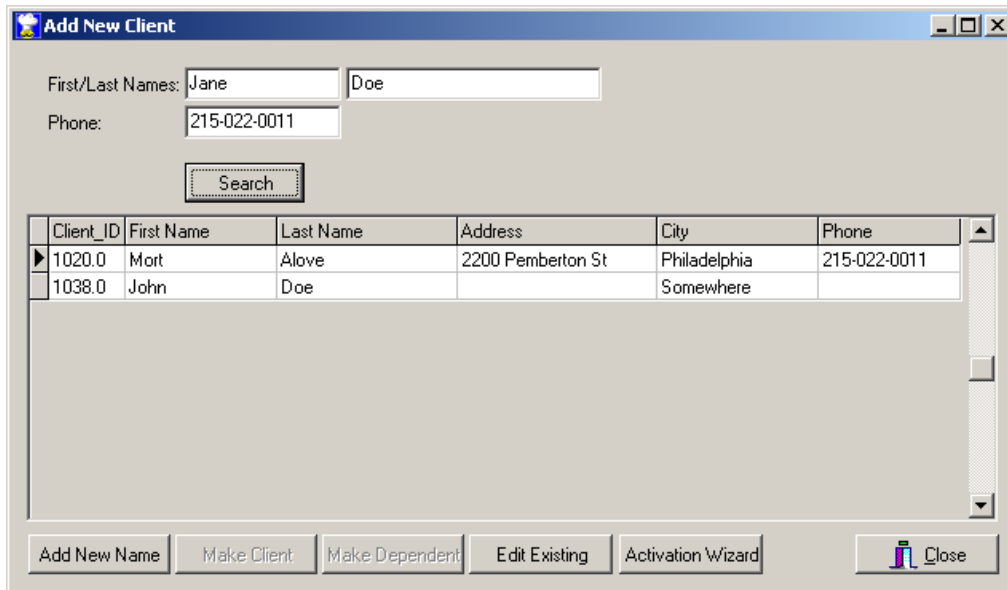
You may also click the **Browse** button, which will result in a 'one client per line' view. (See Illustration 88). Most column headings may be clicked to change the sort order to that column. Double-clicking on any row will return you to the edit screen for the Client whose row was clicked.

Person ID	Client ID	First Name	Last Name	Phone	Address	City	Zip	Stat	Routing	
									Rte	Stop
2843	3885.0	Jane	Doe	123-456-7890	123 Main St	Anywhere		A	N1	1
2842		John	Doe	- -	123 Main St	Havertown	19083			
2846	3886.0	Philip	Frank	215-790-9604		Anywhere		N		
2845	3884.0	Benjamin	Franklin	- -	2100 Pemberton St	Philadelphia	19146	A	N1	1
2844	3883.0	Joseph	Jones	- -		Anywhere		A		

Illustration 88: Clients Browse view

Adding a new name to the database

Click on the **Add Client** button or select **Edit | Add new person** from the menu. The **Add New Client** dialogue will be displayed:



Add New Client

First/Last Names:

Phone:

Client_ID	First Name	Last Name	Address	City	Phone
1020.0	Mort	Alove	2200 Pemberton St	Philadelphia	215-022-0011
1038.0	John	Doe		Somewhere	

Illustration 89: Add New Client dialogue

Enter the first and last names of the individual being added, and the phone number if you have it. Click the **Search** button.

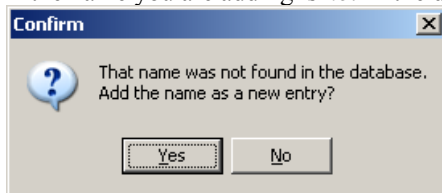
The system will check to see if that name or phone number already exists in the database, and, if so, will present a list of close matches.

If the name you are adding appears in the list, you may do one of three things. Make certain the correct name is selected, and then:

1. Double-click that name (or click the **Edit Existing** button) to be taken to that person's record in the database
2. If the person is not yet a client, and the intention is to make them a full client, you may click the **Make Client** button. The person will be assigned the next available Client ID number.
3. If the person is not yet a client, and the intention is to make them a dependent or affected-person related to an existing client, click the **Make Dependent** button. You will then be presented with a **Locate Dependent's Guardian** dialogue, in which you must locate the client to whom this new person is related. The new person will be assigned an ID number indicating affiliation with the selected client. For example, if the client's ID is 1099.0, the first dependent created will be assigned the ID of 1099.1, the second 1099.2, and so on.

➤ **TIP** While the wording on-screen may say Dependent, many organizations use this functionality to identify any household members receiving meals, other than the Client. Other roles in this category might be Affected Person, Caregiver, etc.

If the name you are adding is *not* in the database, you will be presented with the following dialogue:



Confirm

That name was not found in the database.
Add the name as a new entry?

Illustration 90: Add name as new entry confirmation dialogue

Click the **Yes** button to add the name for which you just searched to the database. Click **No** to close the dialogue without adding the name. If a list of suggested matches is displayed but none of them are the name for which you are searching, you can add the name to the database by clicking the **Add new name** button.

Once a name has been added to the database, you can then edit the new record without making the person a

client by clicking the **Edit Existing** button, or you can immediately make the person a client by highlighting the name in the list of potential matches and clicking either the **Make Client** or **Make Dependent** buttons.

If the new name has been made a Client, the Activation Wizard can be used to ensure that all of the conditions are in place to guarantee that the client will begin receiving deliveries. See “Using the Activation Wizard”, Page 97, for the full instructions on using the Activation Wizard.

The City, State, and ZIP of the new client will default to the values entered in the **Default City/State/ZIP** fields in the **Configuration** window, while the values for which you searched in First Name, Last Name, and Telephone will become the values for those fields in the new record.

The system will always search for a new name before allowing you to add a new record in an attempt to avoid the duplication of existing names.

NOTE: The system will always allow you to enter basic biographic and demographic information (such as address, birth date, race, etc.) for any name in the database, however, service-related information such as routing, diet, etc. is only enabled for those individuals with a client ID (that is, they must have been made a client).

Activating a New Client on a Delivery Service

There are a number of conditions that must be met in order for a client to be selected to receive meals. Those conditions are:

- The **Status** drop-down list at the top of the screen must be set to **Active**
- The client must have been assigned to a **Delivery Service** (on the **Service/Diet** tab)
- The client's **Meals Start Date** (on the **Status/Dates** tab) must have a valid date greater than or equal to the date of the delivery
- The client's **Delivery Type** must be set to either *Ongoing* or *Episodic*.
- The client must have been assigned to a **Route** (on the **Delivery/Route Info** tab)
- On the **Delivery/Route Info** tab the **Day of the Week** must have a checkmark for the day of the week for which a delivery is being generated (if the Client is Ongoing) or there must be a delivery scheduled for the appropriate days (if the Client is Episodic).
- The client must not have any **Suspensions** in effect covering the date for which a delivery is being generated (see “Service Suspensions tab”, Page 78).

≧**TIP**≦ The simplest way to ensure that all of the above elements are completed properly is to use the **Activation Wizard**.

See Also

Using the Activation Wizard, Page 97

Using the Activation Wizard

The **Activation Wizard** is the easiest way to start a new delivery client. The wizard can only be used for those clients who have not yet been started on a delivery service. The wizard is accessed through the **Add New Client** dialogue by clicking the **Activation Wizard** button.

The Welcome screen of the wizard appears as follows:

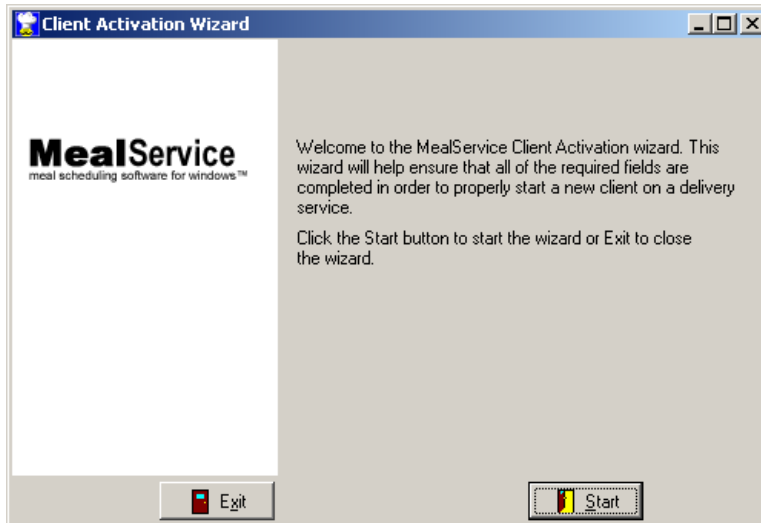


Illustration 91: Client Activation Wizard Welcome screen

You can begin the wizard by clicking the **Start** button. Clicking **Exit** will close the wizard without saving your work. On subsequent pages, you can use the **Next** and **Prior** buttons to navigate among the pages.

Clicking **Start** will display the first screen of the wizard:

Illustration 92: Client Activation Wizard, Service selection page

Using the drop-down list, you must select a **Service** on which to start the Client. Once a Service has been selected, the default frequency for that service will be automatically suggested. If needed, you can select a different frequency from the **Select a Frequency** drop-down list.

Once this page has been set as desired, click the **Next** button to display the next page:



Illustration 93: Client Activation Wizard, Diet selection page

This page asks for information on the Client's **Diet**. Select the appropriate restrictions. If the Client is to receive a standard meal, leave all the boxes *unchecked*. If your agency has elected to use Cold Bag codes, the **Select a Cold Bag** drop-down list will also be visible. Select the Cold Bag Code, as appropriate. If you do not know which Cold Bag Code to use, you can click the **Look Up Code** button, which will suggest the appropriate Cold Bag Code based on the diet restrictions assigned to the Client.

When finished with this screen, click the **Next** button to display the next page:



Illustration 94: Client Activation Wizard, Set Custom Items page

If the Client is to receive the default delivery items for his service nothing need be done on this page. However, if you need to modify the items the Client is to receive, click the **Set Custom Delivery Items** button to display the **Set Custom Delivery Items** dialogue:

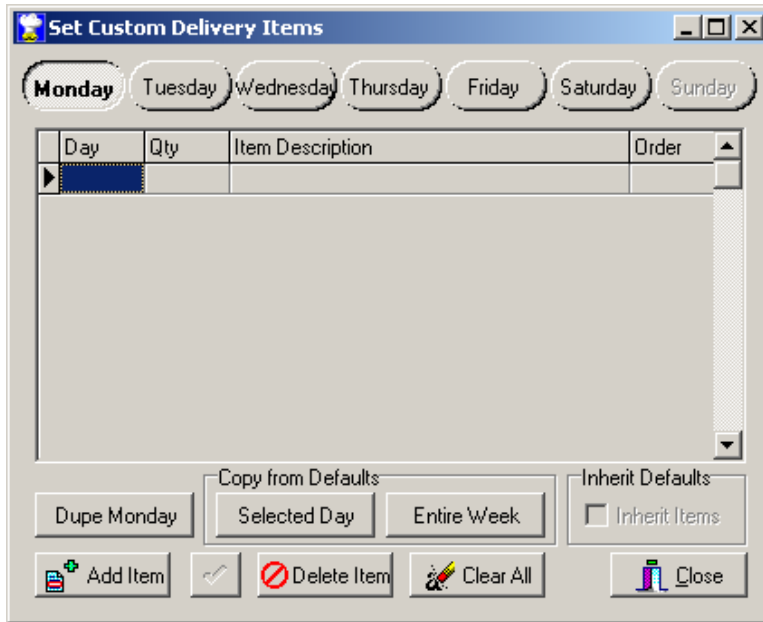


Illustration 95: Set Custom Delivery Items dialogue

See “Set Custom Delivery Items”, on Page 64, for information on using this dialogue

Once finished with the wizard’s Custom Items page, click **Next**. The Meals Start Date screen will then be displayed:

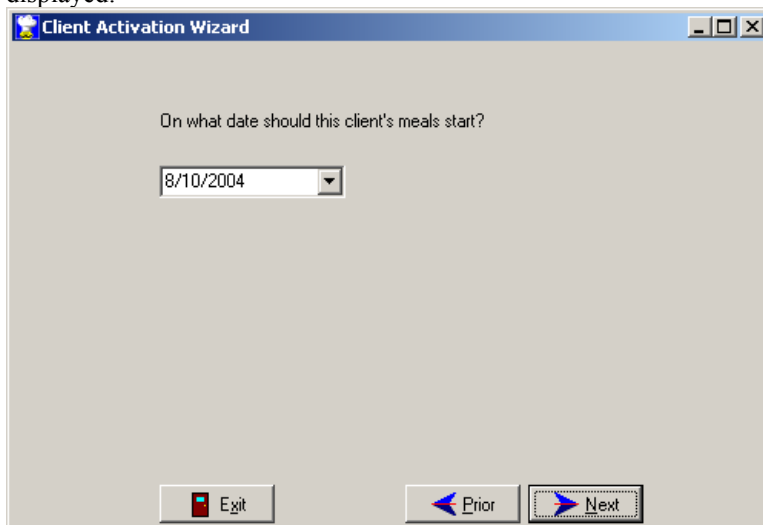


Illustration 96: Client Activation Wizard, Meals Start Date

The date on which this Client’s meals should start is specified on this screen. You can type a date directly into the field labeled **On what date should this client’s meals start?** Or you can click the ▼ button to display a calendar from which to select a date.

Once the appropriate date has been entered, click **Next** to display the next page:

Client Activation Wizard

What is the default route for this client?

And what is the default stop (if known)?

Exit Prior Next

Illustration 97: Client Activation Wizard, Default Route and Stop page

This page is used to specify a Client's Route and Stop. At the **What is the default route for this client?** prompt a Route *must* be selected from the drop-down list. Entering a Stop is optional. Once these options have been completed, click the **Next** button.

The next page displayed will vary, depending upon the delivery frequency chosen on the Service selection page of the wizard. If Ongoing deliveries were selected, the following page is displayed:

Client Activation Wizard

Select the days of the week that this client should receive a delivery.

☐ Monday
☐ Tuesday
☒ Wednesday
☒ Thursday
☒ Friday
☐ Saturday
☐ Sunday

Exit Prior Next

Illustration 98: Client Activation Wizard, Ongoing delivery days

Enter a checkmark for the **days of the week** on which the Client is to receive a delivery. The days of the week that are initially selected (or checked) will be the default delivery days for the Service selected earlier in the wizard. The delivery days can be changed, as desired.

If the delivery frequency chosen on the Service selection page of the wizard was Episodic, the following page is displayed:

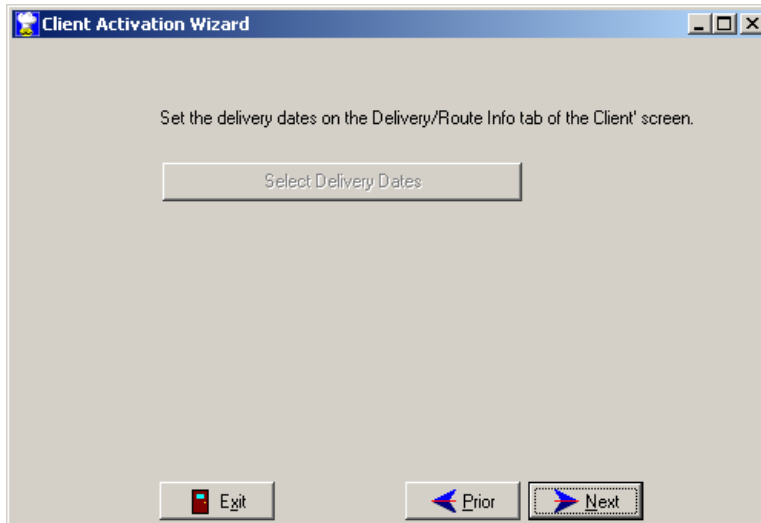


Illustration 99: Client Activation Wizard, Episodic Delivery dates

As indicated on this screen, the delivery dates for an Episodic client will have to be set on the **Delivery/Route** tab of the main Client screen once the wizard has been completed. Click **Next** to display the final screen of the wizard:

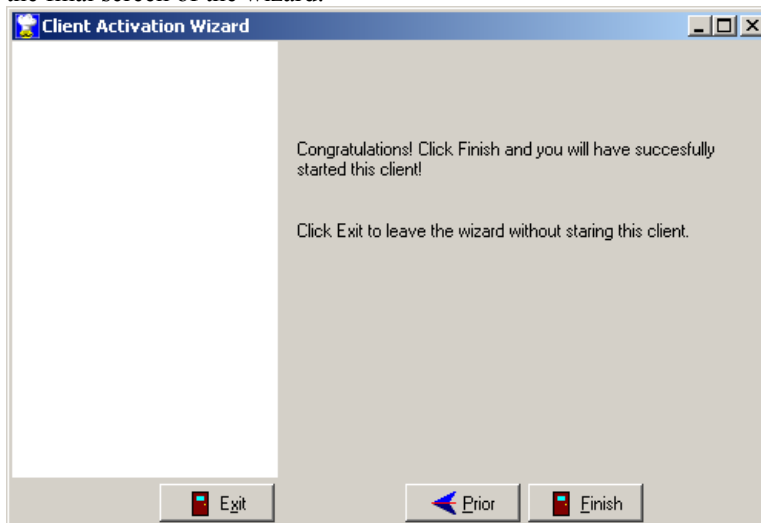


Illustration 100: Client Activation Wizard, Final page

Clicking **Finish** will save your work and close the wizard. You can also click **Prior** to return to one of the earlier screens, or click **Exit** to close the wizard without saving your work.

Managing Households and Household Members

Households provide a method for linking two or more names in the *Client* database. The *Household Members* might be related for any number of reasons: they might reside at the same address, they might be husband and wife, etc. One advantage of having a *Client* be a member of a *Household* is that, when a status change has been made which would affect that *Client's* deliveries, MealService will alert you that the client is a member of a *Household* and that the same changes may need to be made to the other *Household Members*. This is because, typically, household members have the same delivery conditions. For example, they may share the same delivery days.

Creating a *Household* and adding *Members* to it is a three-step process:

- Making certain that all of the potential household members have been added as Clients to MealService.

- Searching for the *Household* and, if not found, creating it.
- Adding one or more existing Clients as *Members* to the selected *Household*.

Note: the potential members of a household must appear as Clients in MealService prior to adding them to a household. Therefore, the procedure is to first add everyone in a household to MealService, then to assign each of those Clients to the household.

Households and Household Members are viewed and managed on the **Biographic Info** tab:

Illustration 101: The Household information portion of the Client's main screen

The rectangle to the right of the *Household Info* label displays the name of the Household to which the Client belongs, if the Client is a member of a Household. The illustration below indicates that the Client is a member of the “Smith 1 Anywhere Lane” Household. Notice that the *Household* name is underlined. This indicates that it is a hyperlink, and clicking on the *Household* name will display the list of the *Household Members*.

Illustration 102: Household information, when a Client is a member of a Household

The button labeled **(Household) Members** serves two purposes: when clicked, if the currently selected *Client* is a member of a *Household* it will display the **Edit Members** dialogue, showing the members of the household to which the Client belongs. If the Client is not yet a member of a *Household*, the **Members** button instead displays a list of all of the *Households*.

The button labeled **Households** displays the complete list of *Households* for editing and managing purposes. For example, using this dialogue you can create new *Households* and rename or delete existing *Households*.

Searching, Creating and Managing Households

A *Household* must exist before a Client can be added to it. We will, therefore, start with the **Households Maintenance** dialogue. The dialogue is launched using one of three methods: when on the Biographic Info tab, clicking the **Households** button or using its speed-key equivalent of **Alt+H**. The speed-key combination of **Control+H** can also be used, regardless of the current tab.

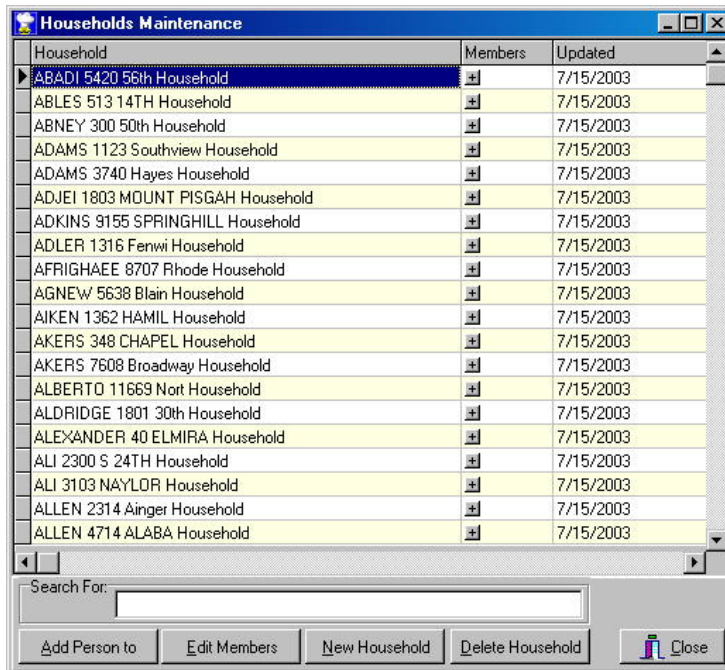


Illustration 103: The Households Maintenance dialogue

The contents of this dialogue are as follows:

1. A grid consisting of three columns: The columns are labeled **Household**, **Members**, and **Updated**.
 - a. The **Household** column displays the names of the current *Households*. The contents of the *Household* column are editable, and typing in this column is, in fact, how a *Household* is renamed.
 - b. The **Members** column displays a '+' sign. The '+' sign indicates that it can be clicked and expanded. Clicking on the '+' will display the *Members* of the currently selected *Household*.
 - c. **Updated** displays the date the selected *Household* was last edited.
2. A box labeled **Search For:** Typing into the **Search** box will search for a *Household* name matching what you have typed. The *Household* name selected in the grid will be that which most closely matches what has been typed into the **Search For** box.
3. **Add Person to** button: This button, when clicked, will add the current *Client* (as displayed on the main screen) to the *Household* selected in the grid, and then display the *Edit Members* dialogue so that the *Role*, and other information pertaining to the new *Member*, can be edited. (The *Edit Members* dialogue is described later in this document). The label of this button is a shortened version of "Add (Current) Person to (the Selected Household)".
4. **Edit Members** button: This displays the dialogue with which the members of the selected *Household* can be edited. Using this dialogue, new *Members* can be added to a *Household*, existing *Members* can be removed from the *Household*, and the *Roles* of each *Household Member* can be edited. This is the same dialogue that is displayed after clicking the **Add Person to** button.
5. **New Household** button: Clicking this button creates a new *Household*. The newly created *Household* is named, by default, using the *Client*'s last name plus the first line of the address of the *Client*. For example, if (on the main screen) the current *Client* is named John Doe and he resides at 12 Main Street, clicking on *New Household* would create a *Household* named "Doe 12 Main Street". The newly created *Household* can be renamed to whatever you wish by clicking on the name of the new *Household* in the grid and typing whatever is desired. For example, if the *Household* consisted of two members who did not have the same last name the *Household* might be renamed to "Smith/Jones Household".
6. **Delete Household** button: This button will display a confirmation dialogue asking if you wish to delete the selected *Household*. Clicking **Yes** will delete the *Household* and remove the *Household* information from any of its *Members*.

7. **Close** button: This button closes the dialogue.

Managing Household Members

The **Household Members** dialogue is used to manage the members of a *Household*. Using this dialogue, *Members* can be added to, or removed from, a *Household*. The *Member's Role* and whether he or she is a *Head* of the Household can also be edited in this dialogue. This window is always labeled with the name of the *Household* currently being managed. In the example below, the “Alove-Apparel 2200 Pemberton St” *Household* is being edited.

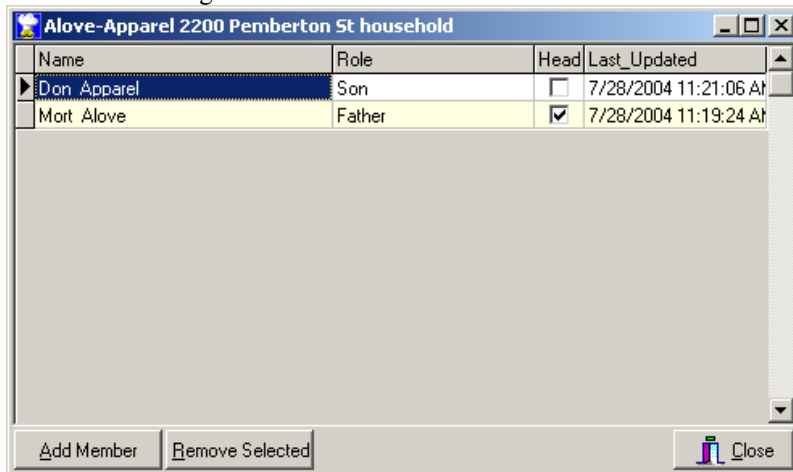


Illustration 104: The Household Members dialogue

The dialogue is launched using one of three methods: when on the Biographic Info tab, clicking the **Members** button or using its speed-key equivalent of **Alt+M**. The speed-key combination of **Control+M** can also be used, regardless of the current tab.

The contents of this dialogue are as follows:

1. A grid consisting of four columns: The columns are labeled **Name**, **Role**, **Head**, and **Last Updated**.
 - a. The **Name** column displays the members of the *Household*.
 - b. The **Role** column displays the Role of the Household Member. This content of this column is editable by clicking in the column and typing whatever is desired.
 - c. **Head** consists of a column of editable checkboxes. Entering a checkmark indicates that this *Member* is a head of the household.
 - d. **Last Updated** displays the date and time that this household member's information was last edited.
2. **Add Member** button: This button, when clicked, adds a blank line to the list of *Household Members*. Clicking on the newly created line in the **Name** column will display a button with an ellipsis ('...'), as illustrated here:

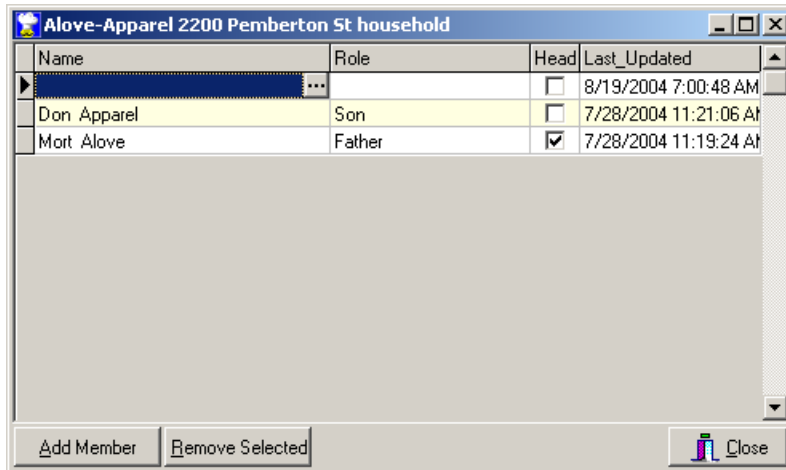


Illustration 105: Adding a new Member using the Household Members dialogue

Clicking on the ellipsis button will launch a **Lookup Household Members** dialogue:

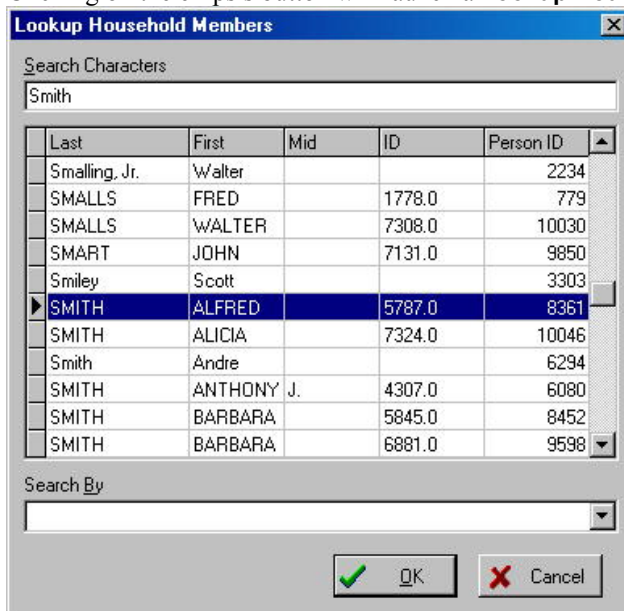


Illustration 106: The Lookup Household Members dialogue

Using the resulting dialogue, you can search for the *Client* that you are adding to the *Household*. Once you have found the correct *Client*, clicking **OK** in the dialogue will select the *Client* you have found, close the Lookup dialogue, and add the *Client* to the *Household*, as shown:

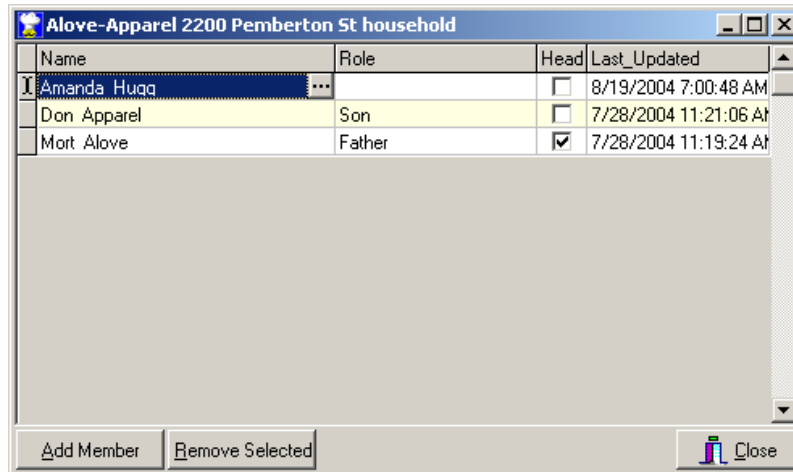


Illustration 107: Newly added Member in the Household Members dialogue

At this point, the new *Member's Role* and *Head of Household* information can be completed.

3. **Remove Selected:** Clicking this button will display a confirmation dialogue asking if the selected *Household Member* should be removed from the *Household*. Clicking **Yes** will remove the selected *Household Member* from the *Household* and remove the *Household* information from the Client's record.
4. **Close:** This button closes the dialogue.

This dialogue has a context menu with the following choices:

- **Add Member – Ctrl+A:** This has the same functionality as clicking the **Add Member** button.
- **Remove Selected – Ctrl+R:** This has the same functionality as clicking the **Remove Selected** button.
- **Locate Selected Household Member – Ctrl+L:** This offers the same functionality as double-clicking on one of the household members.

Some notes on Household Members:

- A Client can only be a member of one *Household* at a time. As a result, the **Client Lookup** dialogue will only show those Clients who are not yet a member of a *Household*.
- Deleting a *Household* removes all of the *Household Member* links to that *Household*.
➤TIP➤ When the **Household Members** dialogue is displayed, double-clicking on a member will close the dialogue and jump to that member's record in the main Client screen.

Household Member Delivery Details Management

One of the reasons to add Clients to a Household is so that the Household can be treated as a unit for delivery purposes. To do so, typically you would want all of the members of a Household to have the same Status, Meals Start date, Meals Stop date, Suspensions, etc. When a Client is a member of a Household, MealService will make available several features and/or generate prompts to help manage the members of the Household.

Migrating Delivery Details

When one or more of the following delivery-related information belonging to a Client is changed:

- Service
- Status
- Delivery Frequency (ongoing or episodic)
- Route
- Stop number
- Delivery days of the week
- Meals Start date
- Meals Stop date

upon saving the changes, the following dialogue will be displayed:

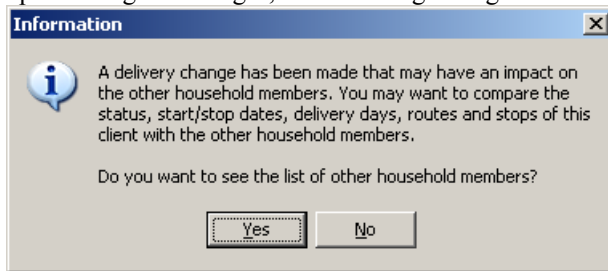


Illustration 108: Household delivery change alert

Clicking **Yes** will display a listing of the other members of the Household, so that the same change can be easily migrated to one or more of the other members:

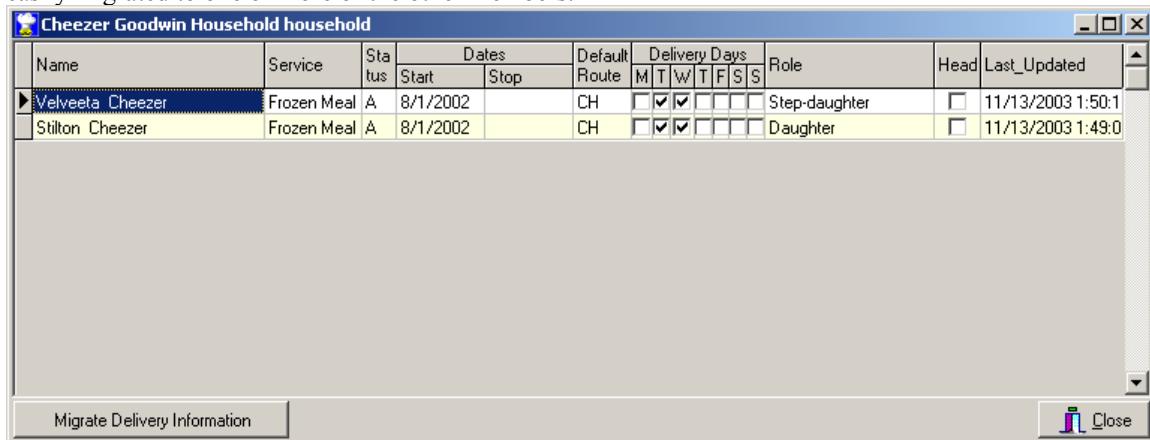


Illustration 109: Household delivery change migration screen

This screen will list all of the household members, other than the member who triggered the dialogue. The delivery-related information such as the Service, Status, Start and Stop Dates, Default Route and Delivery Days will be displayed. This screen is for informational purposes only, the Client information can't be directly edited using this screen.

⚠ **TIP** ⚠ Caution! Double-clicking the screen will close the dialogue and take you to the Household Member on which you double-clicked, in which case you will lose the ability to migrate all of the changes automatically.

When first displayed, the screen will have the first Household Member chosen. Clicking the **Migrate Delivery Information** button will make the delivery-related details of the selected Household Member identical to that of the member who triggered the dialogue. Upon completion of the migration to the first Household Member, a confirmation dialogue will be displayed:

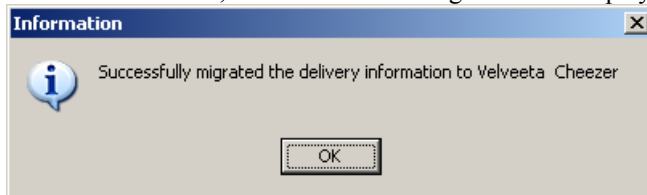


Illustration 110: Delivery Migration confirmation

The next Household Member in the list will then be selected automatically. If the same changes are to be migrated to this member, simply click the **Migrate Delivery Information** button again. Repeat the process as many times as required to bring the other Household Members up to delivery conformity. Click **Close** when finished with the dialogue.

NOTE: If one of the Household Members has different delivery days than the member who triggered the migration, the following additional confirmation will be displayed:

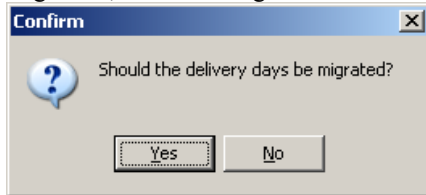


Illustration 111: Delivery Days Migration confirmation

This is because some organizations may not deliver to Household Members with the same frequency as the primary Client. Clicking **Yes** to the above dialogue will ensure that the delivery days are made consistent between the household member who triggered the change and the member to whom the changes are being migrated. Clicking **No** will allow the migration to proceed, and all details *but* the delivery days will be migrated.

Migrating Suspensions

If the Client for whom a Suspension was just created is a member of a Household, the following confirmation dialogue will be displayed:

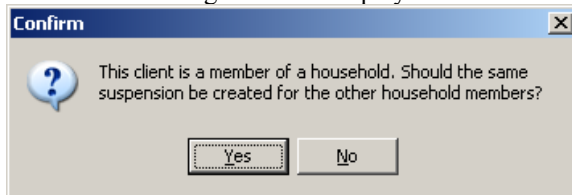


Illustration 112: Suspension alert for Household Member

Responding **Yes** to this dialogue will create an identical suspension for the other Household Members. Clicking **No** will close the dialogue without creating the additional suspensions.

If a Client is a member of a Household when one of his or her Suspensions is deleted, the following confirmation dialogue will be displayed:

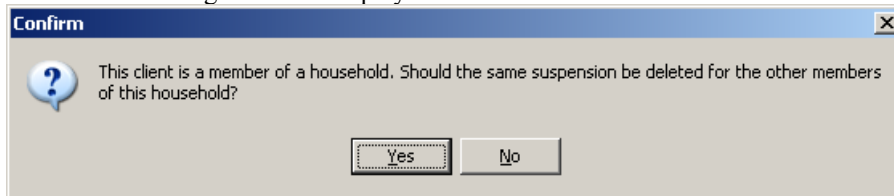


Illustration 113: Household Members Suspension deletion alert

Responding **Yes** to this dialogue will delete the *identical* suspension belonging to any other Household Members. A suspension is identical if it has the same beginning and ending dates. Clicking **No** will leave the remaining suspensions as is.

NOTE: When a Client is a member of a Household, and one of his or her suspensions is subsequently edited, the following information dialogue will be displayed:

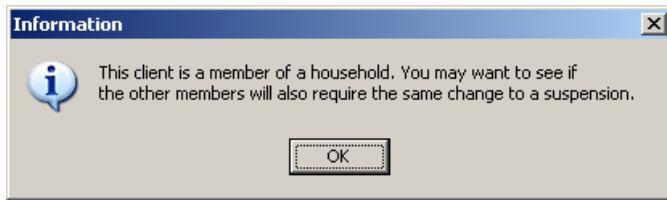


Illustration 114: Suspension modification alert for Household Member

Simply click **OK** to close the dialogue. Note that the burden is on the user to verify that any other Household Member's suspensions are changed as needed. *The change is not migrated automatically.*

Migrating Alternate Addresses

When an Alternate Address is created for a Client who is a member of a Household, the following dialogue will be displayed:

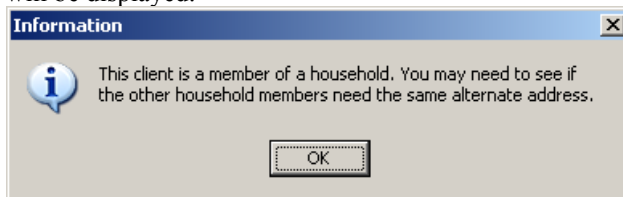


Illustration 115: Household Alternate Address dialogue

This is to remind you that a similar Alternate Address may need to be created for the other members of the same Household. As of this version of MealService there is no way to automatically migrate the address.

Similar to when an Alternate Address is created, when an Alternate Address is deleted from a Client who is a member of a Household, the following dialogue will be displayed:

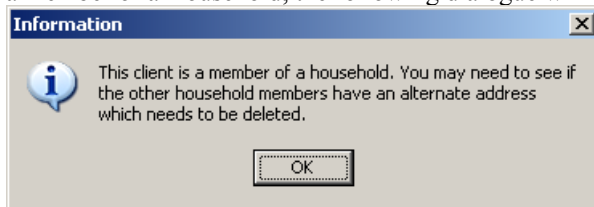


Illustration 116: Household Alternate Address deletion dialogue

With this version there is no way to automatically delete the Alternate Address from any other Household members. You will need to handle that step manually.

Tutorial: Creating a Household and Adding Members (the hard way)

1. Start by having the two, or more, Clients you will be adding to the new *Household* already entered into MealService.
2. Search for the primary member of the *Household*. This would, most likely, be the primary Client or the Head of the household. Since newly created Households are named using the Client's name and address, it is somewhat simpler if the Client's name and address are filled in before creating the household.
3. With the client for whom you just searched on-screen, click on the **Members** button. Since this Client is not yet a member of a *Household*, rather than displaying the members of this Client's *Household*, the button will display the list of all *Households*.
4. Using the **Households Maintenance** dialogue, check to see if the *Household* to which you want to add this client already exists. Do that by searching for any appropriately named *Households*. If you do not find an existing *Household* to which you want to add this Client, then a new *Household* needs to be created. Click the **New Household** button. If you *do* find the correct *Household*, make sure it is selected in the grid and skip to Step 6.

5. A new *Household* will be created, named after the Client currently on the main screen. The new *Household* should be the one now selected in the grid. If desired, the new *Household* could be renamed at this point.
6. With the correct *Household* selected in the grid, click the **Add Person to** button. This will add the current Client to the *Household* and display the **Household Members** dialogue. Edit the member's role, as necessary.
7. To add additional members to this *Household*, click the **Add Member** button. In the resulting **Client LookUp** dialogue, search for the second member you wish to add. Once you have located that Client, click **OK**. This will add the selected Client to the *Household*, close the Lookup, and return you to the **Household Members** dialogue.
8. You may add additional members at this point, or you can close the **Household Members** window and then close the **Households** window.

Using the Household Wizard (the easy way)

The Household Wizard facilitates the creation and management of household members. The wizard may only be used for Clients who are not currently in a household. If a client has already been added to a household, then the **Households** and **Household Member** dialogues will need to be used. In all cases, the wizard applies to the currently selected Client.

Clicking on the (Household) **Wizard** button launches the **Household Wizard**:

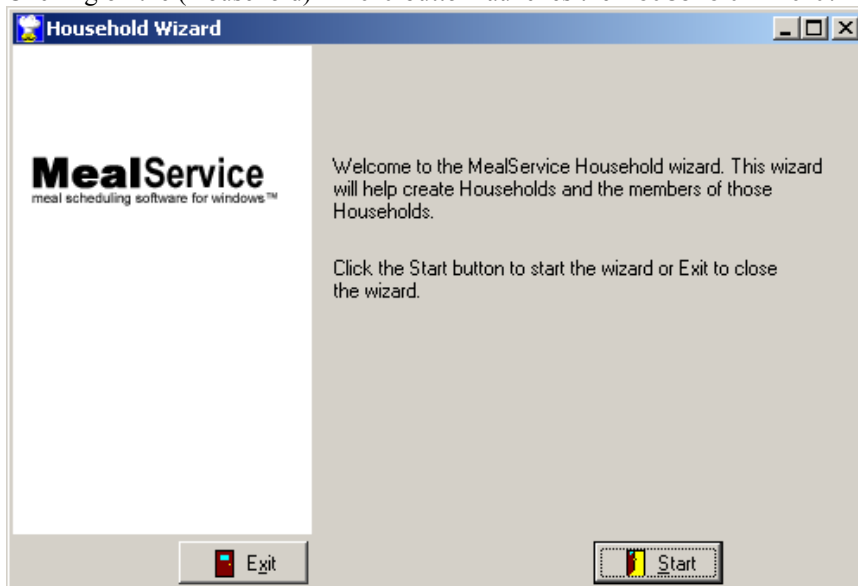


Illustration 117: Household Wizard Welcome screen

The **Start** button can be clicked to proceed with the wizard, and the **Exit** button can be clicked at any time to close the wizard without saving your work. On subsequent pages, **Next** and **Prior** can be clicked, as needed, to navigate among the pages.

Clicking on **Start** displays the first page of the wizard:

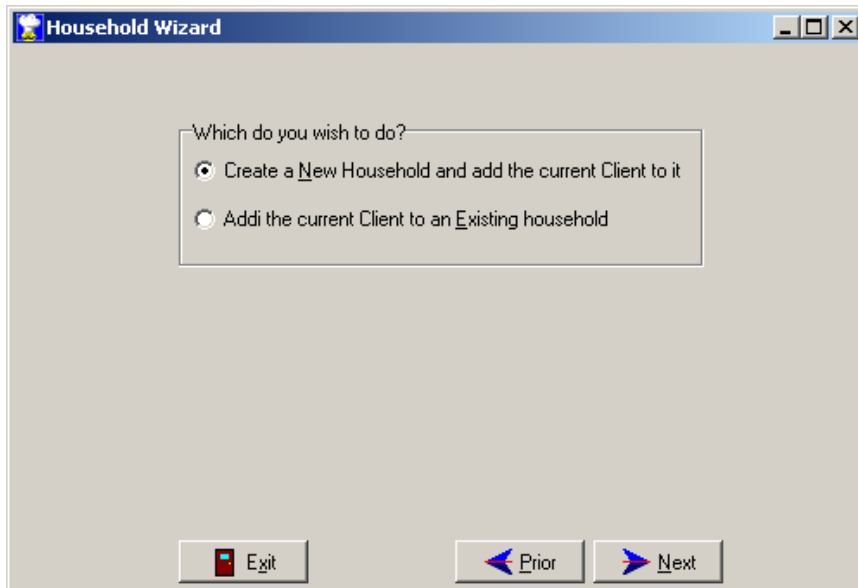


Illustration 118: Household Wizard, Task selection screen

This page asks which of the two household tasks you wish to undertake:

- **Create a New Household** or
- **Add the current Client to an Existing household.**

Select the appropriate option and then click the **Next** button. Depending upon the task, you will be presented with one of the following screens.

If you selected Create a New Household, the next screen will appear as follows:

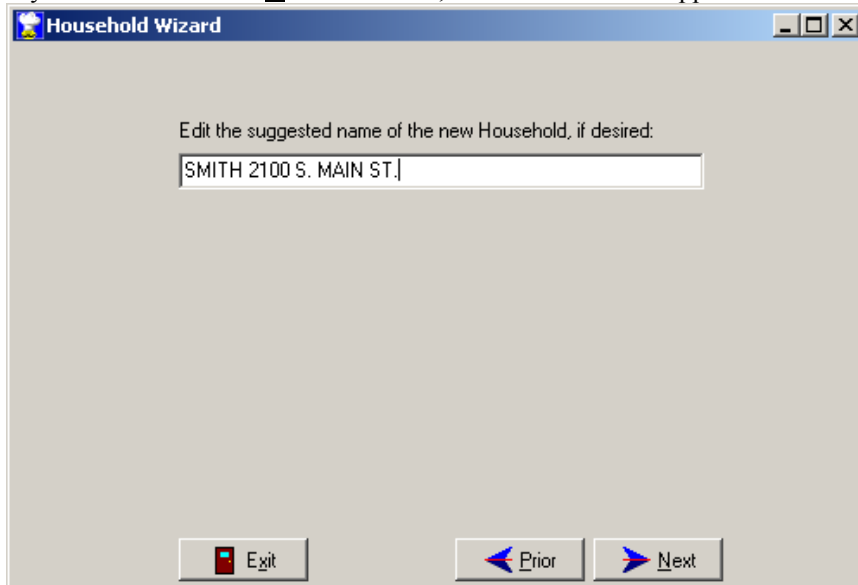


Illustration 119: Household Wizard, Household name screen

The wizard suggests a name for the household, based upon the Client's last name and the Client's address. If both the last name and address are empty the suggested name will be 'New Household'. You can change the name of the household, as desired, by simply retyping in the household name edit field, at the **Edit the suggested name of the new Household** prompt.

If you elected to add the Client to an Existing Household, you will be presented with this screen:

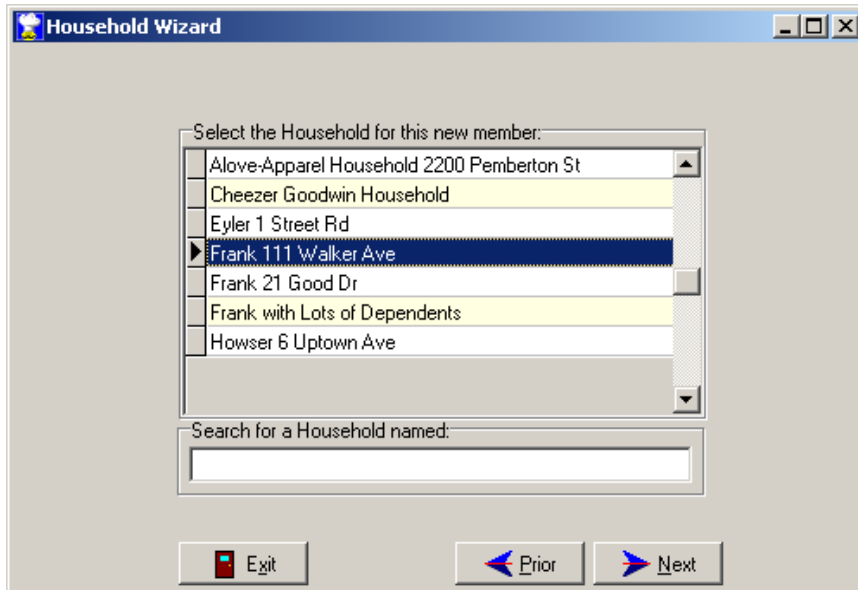


Illustration 120: Household Wizard, Household selection screen

The **Select the Household for the new member** grid displays all of the current households from which you can select. You can search for a particular household by typing in the edit field labeled **Search for a Household named**. As you type, the closest match will be selected in the grid.

Once you have selected the appropriate household (the caret '►' in the grid will be pointing to the selected household. In the illustration above, the *Frank 111 Walker Ave* household has been selected.), you can click the **Next** button to proceed to the next screen.

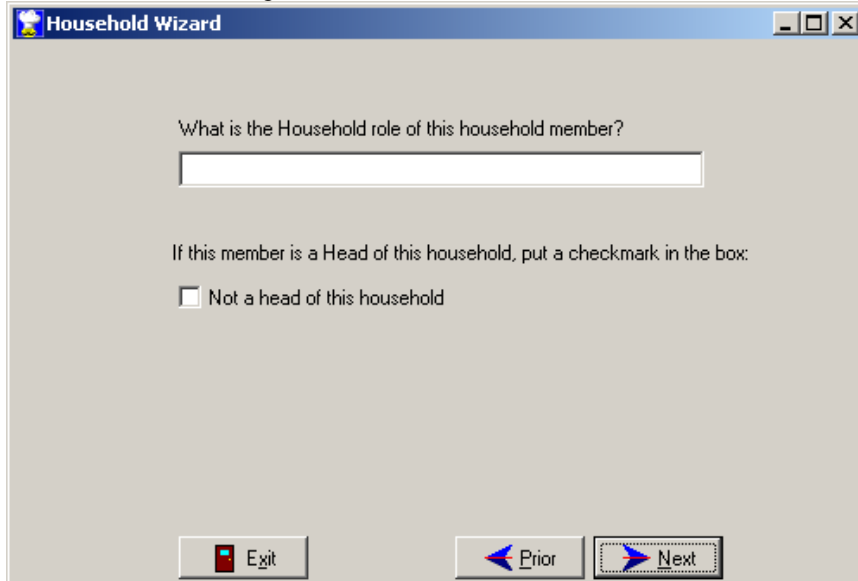


Illustration 121: Household Wizard, Household Member's Role screen

Regardless of whether you created a new household or selected an existing household, this screen is the same. It has an edit field labeled **What is the Household role of this household member?** Type the client's role, such as Mother, Daughter, or Roommate. The **Head of Household** checkbox is used to indicate if the Client is a head of this household. When the box is clicked, a checkmark (☑) will appear and the label will change to **Head of Household**. Leaving the box unchecked indicates that the Client is *not* a head of this household.

When completed with this screen, click the **Next** button to display the final screen.



Illustration 122: Household Wizard, Finish screen

Clicking **Finish** will save your work and close the wizard. You can also click **Prior** to return to one of the earlier screens, or click **Exit** to close the wizard without saving your work.

Creating a batch of Scheduled or Episodic deliveries

MealService has a utility for auto-creating a batch of Scheduled or Episodic deliveries. The **Auto-Create** dialogue is displayed by clicking the **Auto-Schedule** button that is visible on both the **Scheduled** and **Episodic** delivery maintenance screens.

Clicking the button displays the following dialogue:

Auto-Create Episodic Deliveries

Recurrence Pattern

Daily Weekly Monthly

☒ Every 1 day(s)

☐ Every weekday

☐ Every weekend day

Range of Recurrence

Start: []

☒ End after: 1 occurrences

☐ End by: []

Limit to the following Delivery Days

☒ Delivery Days for the Service selected below

☐ Any Agency Delivery Days

☐ No Limitation

Select the Delivery Service

Fresh Meal Service [1]

OK Cancel

Illustration 123: Auto-Create dialogue, Daily tab

There are tabs across the top of the screen labeled **Daily**, **Weekly**, and **Monthly**, indicating the type of delivery that can be created on the respective pages.

Daily Deliveries can be defined as

- Every N days, where N can be any number from 1 to 31
- Every weekday
- Every weekend day

Weekly Deliveries can be defined on the Weekly tab:

Auto-Create Episodic Deliveries

Recurrence Pattern

Daily **Weekly** Monthly

Recur every 1 week(s) on:

☐ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday ☐ Friday

☐ Saturday ☐ Sunday

Illustration 124: Auto-Create dialogue, Weekly tab

On this page you can select the recurrence frequency (any recurrence from every 1 week to every 52 weeks) and the specific days of the week for which deliveries should be created.

Monthly deliveries can be defined on the Monthly tab:

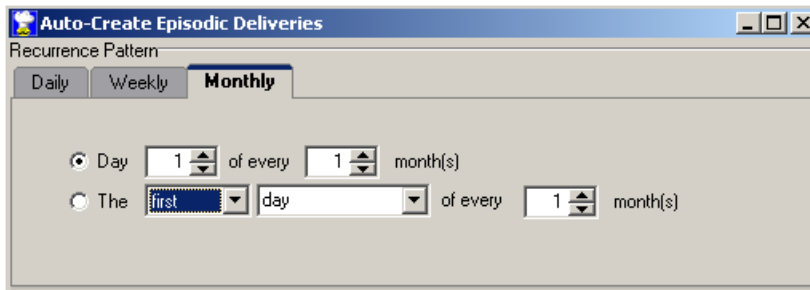


Illustration 125: Auto-Create dialogue, Monthly tab

The Monthly page allows for sophisticated scheduling such as the second weekday of every other month or the fifth day of every third month.

Once the appropriate recurrence pattern has been entered, you must select a **Range of Recurrence**. You must specify a **Start** date, and the ending of the recurrences must be determined by specifying one of the following:

- At the **End after** prompt, specify a number of deliveries (occurrences) to create
- At the **End by** prompt, select a future date on which the deliveries are to end

The **Limit to the Following Delivery Days** box allows for specifying the behavior when one of the scheduled dates falls on a day for which the Service does not deliver, for which the Agency does not deliver, or is irrelevant. For example, assume **Limit to Delivery Days for the Service selected below** is selected and the Service for which deliveries are being created delivers only on Wednesday through Saturday. If one of the scheduled dates then falls on a Monday it will not be created.

The **Select the Delivery Service** drop-down list allows the selection of a specific service for which the deliveries should be created.

Once all of the options have been set as desired, click the **OK** button to create the deliveries and close the dialogue or click **Cancel** to close the dialogue without creating the deliveries. **NOTE:** the **OK** button will not become enabled until all of the conditions required to create a batch of deliveries have been set. For example, if Weekly deliveries are selected, the **OK** button will not become enabled until at least one day is checked.

How to Create a Delivery Report

Delivery reports are accessed through the **Reports | Print | Delivery Reports** menu. Prior to printing a delivery report for a given date that date's deliveries must be *Prepared* and *Saved*. Preparing deliveries is the process in which MealService retrieves any clients eligible for meals (that is, their start date is greater than or equal to the date being processed), who have a checkmark in the day of the week being processed (that is, they must be scheduled to get meals on the particular day) or have a Scheduled or Episodic delivery for the date, do not have a Stop date of the day of processing or earlier, and are not currently suspended. For each client who is eligible for meals on this day the system checks to see if an alternate address has been created which is valid for the date or day of delivery. If so, it uses that alternate address and if not, it uses the client's permanent address. It then assigns the client's day-specific route (if one exists, and if not uses the default route) and day-specific stop (if one exists, and if not uses the default stop).

Selecting **Reports | Process | Daily Deliveries** from the main menu will launch the **Daily Run Preparation** dialogue:

Daily Run Preparation: Tuesday Oct 12, 2004

File Actions

Prepare Deliveries for: **Tuesday October 12, 2004** All Delivery Types Prepare!

Route	Stop		Service	Household	ID	Client	Address	City	Diet
CC	0	<input type="checkbox"/>	OD Fresh Meal Service		1036.0	Meg Maloney	97 Navajo St	Somewhere	
CC	1	<input checked="" type="checkbox"/>	OD Fresh Meal Service	Alove-Apparel 2200 Pembe	1022.0	Don Apparel	County Dialysis Unit	Somewhere	
CH	2	<input type="checkbox"/>	OD Frozen Meal Service	Cheezer Goodwin Househc	1010.0	Velveeta Cheezer	205 Avenue of the S	Chester	LoPot
CH	2	<input type="checkbox"/>	OD Frozen Meal Service	Cheezer Goodwin Househc	1010.1	Chedda Cheezer	205 Avenue of the S	Chester	
CH	2	<input type="checkbox"/>	OD Frozen Meal Service	Cheezer Goodwin Househc	1010.2	Stilton Cheezer	see notes for Velvee	Chester	
CH	3	<input type="checkbox"/>	OD Fresh Meal Service	Frank 21 Good Dr	1017.0	Dale B. Changesmade	3010 W. 7th St.	Chester	
CH	3	<input type="checkbox"/>	OD Fresh Meal Service	Frank 21 Good Dr	1032.0	Pat Frank	1 Good Dr	Somewhere	
SC	0	<input type="checkbox"/>	OD Congregate Meals	Eyler 1 Street Rd	1006.0	Test Test	1060 S. 9th St.	Philadelphia	VEG / Veg

Apply Route Changes Send to Mapping Save As Save Data Print Report Close

Browse Client Count: 8 OK: No Active Transaction System Administrator

Illustration 126: Daily Run Preparation

At the **Prepare Deliveries for** prompt, select the date for which the deliveries are to be prepared.

✎ **TIP** ✎ The number of days in the future to which the preparation date will default can be set in the Configuration utility. (See “Delivery Advance Preparation Days”, Page 41).

Next, using the unlabeled drop-down list (which defaults to **All Delivery Types**), select the delivery types to be included. The available choices are:

- **All Delivery Types**
- **Ongoing Only**
- **Episodic Only**
- **Scheduled Only**
- **Episodic and Scheduled**

Selecting a specific delivery type can be useful for a situation such as a holiday, when only deliveries that have been specifically created for that date are to be delivered. In such a case, *Scheduled Only* or *Episodic and Scheduled* might the selection, since all of the regular ongoing deliveries could be excluded this way.

Once the date and delivery types have been selected, click **Prepare!**. After a short processing period the system will then present a list of clients identified as requiring delivery. The columns in the grid of ‘about to be delivered’ data are as follows:

- **Route:** This column contains the Route identified for each Client.
- **Stop:** This column contains the Stop for each Client.
- **Alternate Address** Checkbox (unlabeled): This column will display a checkmark (☒) if the respective Client’s delivery is going to an Alternate Address.
- **Delivery Type** column (unlabeled): This column contains two letters: the first indicates the Delivery Frequency, and will be one of three characters: **O** (for Ongoing), **E** (for Episodic) or **S** (for Scheduled). The second character indicates the Delivery Type, and will be either **D** (for Delivered) or **W** (for Walk-In).
- **Service:** This will indicate the Service for which the delivery is being made.
- **Household:** A Household name will be displayed, if the respective recipient is a member of a Household.
- **ID:** This is the Client ID.
- **Client:** This is the recipient’s name.
- **Address:** This is the street address to which the delivery is being made.
- **City:** This is the city to which the delivery is being made.
- **Diet:** The Diet Restrictions, if any, of the respective recipient will be displayed in this column.

This ‘about to be delivered’ data can then be edited for any last-minute changes: Routes can be changed (by clicking on an entry in the **Routes** column a **Routes drop-down list** will become available), Stops can be

edited (by clicking on an entry in the **Stop** column the value can be edited), and recipients can be removed from the list (by right-clicking and selecting **Remove selected clients deliveries** from the context menu, or by pressing **Control+Delete**). Any changes made on this screen are temporary, except for modifications to the Routes and Stops, which may be permanently migrated back to the database by clicking the **Apply Route Changes** button. Once any needed changes have been made, if any, you must save the data. Saving the data credits all of the clients on the list with their meals for the day, and prepares the data for printing a report. Saving the deliveries always deletes any prior credits for this day, so Clients can't be double-credited.

This screen offers a wide range of functionality accessed through the context menu or the buttons along the bottom of the screen. Here are those functions.

Mouse Action

- **Double-Clicking** a line in the grid will display a dialogue in which the Client's address and delivery directions can be edited. The Default Route, and the Route for each day, is also displayed (but can't be edited). **NOTE:** If an address is edited using the pop-up dialogue, the change will not be reflected in the deliveries grid until the deliveries are re-prepared.

Context Menu

- **Reset routes of selected clients (Control+R):** Multiple records in the grid can be selected (by control-clicking or shift-clicking), and the Routes of the selected records can all be set to the same value by selecting this option. This offers a quick method to move selected Clients to a new route. (See "Order Stops by Route", Page 165, for complete instructions on how the Reset Routes, Reset Stops, and Increment/Decrement Stops features work).
- **Reset stops of selected clients (Control+S):** Multiple records in the grid can be selected (by control-clicking or shift-clicking), and the Stops of the selected records can all be set to the same value by selecting this option.
- **Increment/Decrement stops of selected clients (Control+I):** Multiple records can be selected in the grid (by control-clicking or shift-clicking), and the Stops of the selected records can all be increased or decreased by the same value by when this option is chosen.
- **Remove selected clients' deliveries (Control+Delete):** Selecting this option will remove the selected delivery records from the prepared deliveries. This is a temporary action: re-preparing the deliveries would restore the records to the grid.
- **Export records (Control+E):** This option will display a dialogue in which one of several external formats can be selected. The choices include: Syk (for Excel), text, and HTM. Once a format is selected and a file name specified, the delivery data will be exported to the selected format.
- **Quick Clients Listing (Control+L):** This option will generate a quick listing (to either the screen or printer) of the Clients included in the delivery.
- **Populate Grid with Previously Saved Deliveries (Control+Alt+P):** Selecting this option will display a dialogue in which you will be prompted for the date of a previously saved delivery. Closing the dialogue affirmatively will cause the grid to be cleared and then repopulated with the deliveries of the previously saved date. The caption of the window will also be updated to reflect the date chosen. This option might be useful if maps need to be generated, after the fact, for the deliveries of a specific date.

Buttons

- **Apply Route Changes:** Changes made to the Routes and Stops on this screen are normally temporary. Clicking this button migrates any changes to Routes and/or Stops on this screen and *permanently* applies them to the respective Client records. The functionality offered by this button essentially turns the entire *Prepared Deliveries* screen into a *Reorder Routes* utility.
- **Send to Mapping:** see "Mapping with MapPoint and Streets & Trips/AutoRoute", Page 178, for instructions on the functionality offered by this button.
- **Save As:** clicking this button saves the Clients identified for deliveries to a List (one of the features of the optional ListMaker) so that the list of Clients can be reused. Examples of the reuse might include: sending an additional one-off item to the Clients receiving this delivery, or rescheduling the deliveries

- to a different day when a holiday falls on a delivery day and therefore deliveries are not being made.
- **Save Data:** this button saves the delivery information and credits the respective Clients for their deliveries, in preparation for printing any delivery reports.
- **Print Report:** clicking this button launches the **Select a Delivery Report to Run** dialogue. The same dialogue can be accessed through the **Reports | Print | Delivery Reports | Delivery Reports and Labels** menu selection.

To print a report, click on the **Save Data** button to save the data, and then click on the **Print Report** button. Clicking the **Print Report** button will generate a dialogue similar to the following.

Illustration 127: Delivery Report selection dialogue

See “Delivery Reports”, Page 139, for the instructions on using the Delivery Report dialogue.

See Also

Mapping with MapPoint and Streets & Trips/AutoRoute, Page 178

Order Stops by Route, Page 165

Situations where additional food is delivered on an exceptional basis (i.e., Blizzard Bags), Page 125

Crediting Scheduled and Episodic Deliveries and Other Events, After the Fact

The section above on How to Create a Delivery Report (on Page 116) discusses how *preparing* a set of deliveries credits the meals to the Clients receiving those deliveries. There are several situations where deliveries or walk-in visits might fall between the cracks and go un-credited. For example:

- Organizations may have walk-in Clients, such as at a grocery pantry or congregate site. Typically walk-in visits are recorded using Episodic events, after the actual event has happened.
- Occasionally a delivery must be assigned to a Client retroactively. A Scheduled delivery for the date in the past is often created in this event.

In both situations, these after-the-fact events and deliveries must somehow be credited to the Client(s). MealService offers a method, similar to preparing deliveries for a future date, of identifying un-credited past Scheduled and Episodic events and deliveries and crediting the appropriate Clients. In other words, preparing deliveries normally looks forward. Crediting Episodic Events is similar, except that it is looking backwards.

Selecting **Reports | Process | Episodic events to be Credited** from the main menu will launch the following screen:

Credit Walk-In Clients and Episodic/Scheduled Deliveries

Credit episodic events through:

Date	Route	Stop		Service	Household	ID	Client	Address	City	Diet
7/27/2004	CC	1	<input checked="" type="checkbox"/>	SD Fresh Meal Service	Alove-Appare	1022.0	Don Apparel	County Dialys	Somewhere	
12/31/2003	FE	3	<input type="checkbox"/>	SD Fresh Meal Service		1015.0	Dahlia Bouquet	7001 E Roos	Philadelphia	Veg / LoAcid
8/16/2004	FE	3	<input type="checkbox"/>	SD Fresh Meal Service		1015.0	Dahlia Bouquet	7001 E Roos	Philadelphia	Veg / LoAcid
8/2/2004	CC	0	<input type="checkbox"/>	ED Fresh Meal Service		1008.0	Jeff Bridges	99 Navajo St	Philadelphia	
12/31/2003	CH	0	<input type="checkbox"/>	SD Fresh Meal Service	Frank 21 Gor	1017.0	Dale B. Changesmade	3010 W. 7th	Chester	
12/9/2003	CH	0	<input type="checkbox"/>	SD Holiday Dinner	Frank 21 Gor	1017.0	Dale B. Changesmade	3010 W. 7th	Chester	
8/16/2004	FE	1	<input type="checkbox"/>	ED Fresh Meal Service		1035.0	KoKo Channel		Somewhere	LoSalt
12/31/2003	WC	3	<input type="checkbox"/>	SD Fresh Meal Service		1012.0	Mae December	420 Cobbs C	Philadelphia	
4/3/2004	CC	0	<input type="checkbox"/>	ED Fresh Meal Service		1037.0	Jim Ferro	311 Main St	Webster	
4/12/2004	CC	0	<input type="checkbox"/>	ED Fresh Meal Service		1037.0	Jim Ferro	311 Main St	Webster	
4/15/2004	CC	0	<input type="checkbox"/>	ED Fresh Meal Service		1037.0	Jim Ferro	311 Main St	Webster	
4/17/2004	CC	0	<input type="checkbox"/>	ED Fresh Meal Service		1037.0	Jim Ferro	311 Main St	Webster	
12/31/2003	CH	0	<input type="checkbox"/>	SD Fresh Meal Service		1025.0	Jay Frank		Somewhere	
12/30/2003	CC	0	<input type="checkbox"/>	SD Frozen Meal Servi		1031.0	Priscilla Frank		Somewhere	
12/31/2003	CC	1	<input type="checkbox"/>	SD Fresh Meal Service	Alove-Appare	1029.0	Amanda Hugg	700 W Grave	Philadelphia	Veg / LoSpice / N
12/31/2003	CC	0	<input type="checkbox"/>	SD Frozen Meal Servi		1027.0	Bea Leavit Ormott	99 St Martins	Philadelphia	
12/31/2003	WC	2	<input type="checkbox"/>	SD Fresh Meal Service		1011.0	Ornery Oldman	5130 Pine St	Somewhere	Diabetic
12/30/2003	FE	0	<input type="checkbox"/>	SD Fresh Meal Service		1019.0	Andy Walksutmee	3004 Rhawn	Philadelphia	LoSalt

Navigation:

Client Count: 18 OK: No Active Transaction

Illustration 128: Credit Walk-In Clients and Episodic/Scheduled Deliveries screen

At the **Credit episodic events through** prompt, enter (or select from the drop-down calendar) the date through which the scheduled and episodic events should be credited. The date defaults to the present date (assuming that you wish to credit all past events), but the date can be changed as desired. Once you have entered the appropriate date, click the **Prepare!** button. After a short processing period the list of un-credited events will be displayed in the grid, as illustrated above.

The columns in the grid are as follows:

- **Date:** This column contains the date on which the event or delivery occurred
- **Route:** This column contains the Route identified for each Client. Often a Congregate site is assigned its own route number.
- **Stop:** This column contains the Stop for each Client.
- **Alternate Address** Checkbox (unlabeled): This column will display a checkmark (☒) if the respective Client's delivery was going to an Alternate Address.
- **Delivery Type** column (unlabeled): This column contains two letters: the first indicates the Delivery Frequency, and will be one of two characters: **E** (for Episodic) or **S** (for Scheduled). The second character indicates the Delivery Type, and will be either **D** (for Delivered) or **W** (for Walk-In).
- **Service:** This will indicate the Service for which the delivery was made.
- **Household:** A Household name will be displayed, if the respective recipient is a member of a Household.
- **ID:** This is the Client ID.
- **Client:** This is the recipient's name.
- **Address:** This is the street address to which the delivery was made.
- **City:** This is the city to which the delivery was made.
- **Diet:** The Diet Restrictions, if any, of the respective recipient will be displayed in this column.

Right-clicking on the grid will display the following context menu:

Remove selected clients' deliveries	Ctrl+Del
Delete episodic events of selected Client	Ctrl+D
Export records	Ctrl+E
Quick Clients Listing	Ctrl+L
Close	

Illustration 129: Episodic Events to be Credited Context menu

Using this menu, one of two methods can be selected to manage the deliveries appearing in the list:

- **Remove selected clients' deliveries** — **Ctrl+Del** can be selected to remove deliveries from the list of events about to be credited. (Any deliveries so removed would then get picked up for crediting the next time the *Credit Episodic Events* utility was run, because the underlying episodic event(s) would still exist).
- **Delete episodic events of selected Client** — **Ctrl+D**: This choice allows the underlying episodic events themselves to be managed. The resulting dialogue displays all of the un-credited episodic events belonging to the selected Client, as follows:

Episodic/Scheduled Client Information

Client Name: Dahlia Bouquet
Address: 7001 E Roosevelt Blvd.
Philadelphia PA 19154

Client ID / Person ID: 1015.0 / 19
Default Service: Fresh Meal Service
Status: A
Start Date: 8/20/2002
Stop Date:

Select Uncredited Episodic and Scheduled Deliveries for Deletion

☐ Wednesday, December 31, 2003, SD: Fresh Meal Service
☐ Monday, August 16, 2004, SD: Fresh Meal Service

Illustration 130: Episodic/Scheduled Client Information screen

This dialogue may be useful in those situations where episodic or scheduled deliveries had been created for a Client, and those deliveries are no longer needed: perhaps because the client became inactive prior to the respective episodic dates having been fulfilled. This dialogue displays some relevant Client status information so that the determination can be made whether to delete any of the displayed events. Enter a checkmark for any of the date(s) to be deleted then click the **Delete** button. The Client's selected scheduled and/or episodic deliveries will be deleted, and the *Credit Episodic Events* screen will automatically refresh to reflect the deletion(s).

The functionality offered on this screen is virtually identical to that offered by the **Delete** button on the main **Maintain Episodic** and **Maintain Scheduled Deliveries** screens. Using this dialogue, however, allows deleting any or all of the underlying episodic and scheduled events (that have not yet been

credited) without having to navigate from Client to Client.

Once the list of un-credited events has been modified, as necessary, click the **Save Data** button to credit each of the Clients with their respective events.

Managing Special Meals

Special Meals are those designated by an organization as requiring special preparation, usually because a Client's diet restricts him or her from consuming the normal day's meal due to dietary concerns. For example, a vegetarian client would not wish to eat a Meat Loaf dinner and a renal client absolutely could not eat a meal containing broccoli. MealService offers a method of identifying one or two daily meals as Special for a Client, based on one of three conditions:

- Having any modified diet
- Having selected diet restrictions
- Receiving items other than the default items for the Client's service

A Client who is receiving a Special meal has his or her entry, on delivery reports and labels, flagged with a user-chosen label (such as **Special Hot**).

NOTE: Special Meals is a feature of MealService that must be configured to be operational. The feature is enabled on the **Configuration** screen. From the main menu, select **Edit | Table Maintenance | Configuration**, then select the **Meal Deliveries** tab. Special Meals is controlled by the checkbox labeled **Flag Special Meals**. When that box is checked, the Special Meal functionality will be enabled. (See "Special Meals", Page 15, for additional information).

One ramification of enabling Special Meals is that a confirmation dialogue will be displayed immediately after clicking **Save Data** when preparing a day's deliveries. The **Set Special Meals Qualification** dialogue appears as follows:

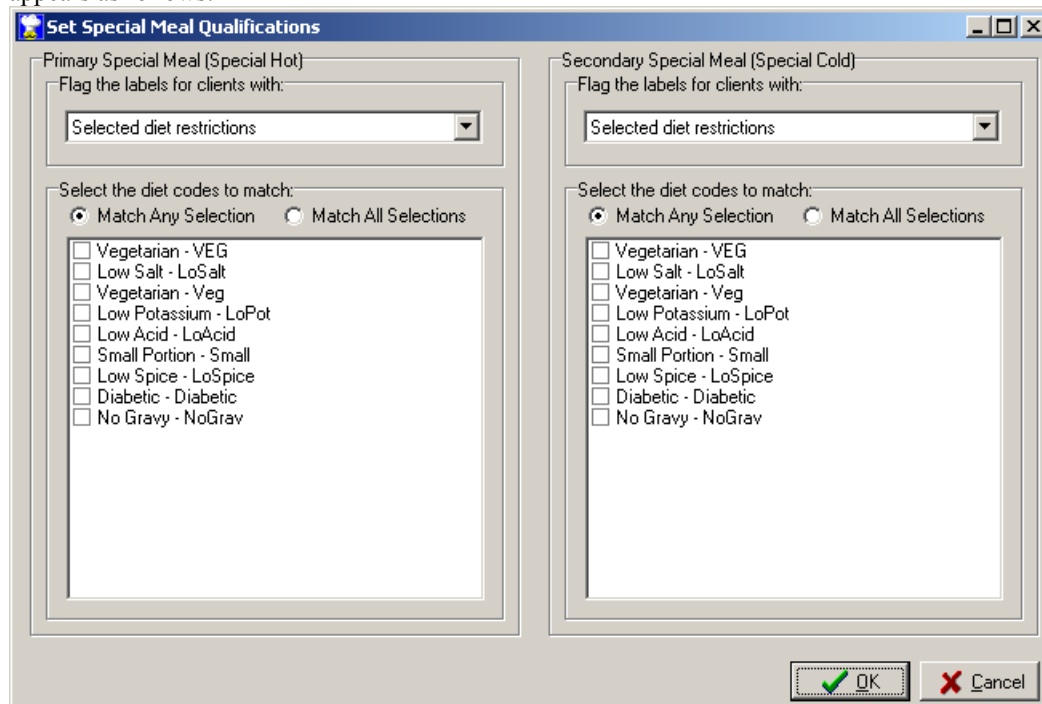
The image shows a Windows-style dialog box titled "Set Special Meal Qualifications". It has two main sections: "Primary Special Meal (Special Hot)" on the left and "Secondary Special Meal (Special Cold)" on the right. Each section contains a "Flag the labels for clients with:" label and a dropdown menu currently showing "Selected diet restrictions". Below each dropdown is a "Select the diet codes to match:" label with two radio buttons: "Match Any Selection" (selected) and "Match All Selections". Under each radio button is a list of diet codes with checkboxes: Vegetarian - VEG, Low Salt - LoSalt, Vegetarian - Veg, Low Potassium - LoPot, Low Acid - LoAcid, Small Portion - Small, Low Spice - LoSpice, Diabetic - Diabetic, and No Gravy - NoGrav. At the bottom right of the dialog are "OK" and "Cancel" buttons.

Illustration 131: Set Special Meals Qualification dialogue

In this dialogue you can enter the specifications that would cause either of the two meals to be flagged as Special. There are two drop-down lists in which you specify what makes the respective meal special. The choices are

- **Items other than the default** — this choice would be used when you wished to flag any Clients meal

as special if the client were receiving any items other than the normal delivery items.

- **Any diet restriction** — this choice would be used to flag a meal as special if a Client had any kind of dietary restriction in place.

- **Selected diet restrictions** — this choice would be used to select specific dietary restrictions. When this option is chosen there are two additional sub-selections:

Match Any Selection — In this case, any match would flag the meal as special. For example, if Bland, Mechanical Soft, Renal, and Diabetic were chosen, a client who had any one of those diets would be flagged as requiring a special meal.

Match All Selections — In this case, all of the selected diets must match before a meal would be flagged as special. For example, if Bland, Mechanical Soft, and Renal were chosen, a client would be required to exactly match those three restrictions in order to be flagged as requiring a special meal.

Once the settings have been chosen, click **OK** to close the dialogue and apply the restrictions to the day's deliveries or click **Cancel** to avoid marking any deliveries as special. MealService, as part of the daily delivery preparation, will identify the matching meals and flag them appropriately.

Should you wish to identify the Special Meals in advance of saving the daily deliveries, the same Special Meal dialogue can be accessed from the main menu. Selecting **Edit | Special Meal** will display the following dialogue:

Delivery Date	Specials Defined	
	Meal 1	Meal 2
Tuesday December 7, 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Thursday July 29, 2004	<input type="checkbox"/>	<input type="checkbox"/>
Monday July 5, 2004	<input type="checkbox"/>	<input type="checkbox"/>
Wednesday June 16, 2004	<input type="checkbox"/>	<input type="checkbox"/>
Thursday March 25, 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Monday March 8, 2004	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Monday January 5, 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Friday January 2, 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Thursday January 1, 2004	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Thursday December 11, 2003	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Thursday December 4, 2003	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tuesday December 2, 2003	<input type="checkbox"/>	<input type="checkbox"/>
Thursday November 27, 2003	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Thursday November 20, 2003	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Wednesday November 19, 2003	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tuesday November 18, 2003	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Monday November 17, 2003	<input type="checkbox"/>	<input type="checkbox"/>
Tuesday November 11, 2003	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Friday October 31, 2003	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Monday October 27, 2003	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Friday October 24, 2003	<input type="checkbox"/>	<input type="checkbox"/>

Buttons: Add Date, Edit Date, Close

Illustration 132: Special Meals by Date dialogue

This dialogue displays those dates for which Special Meals have been designated. You can click the **Add Date** button, or you may select an existing entry from the list of dates and click the **Edit Date** button to edit the specifications for that date. In either case, the following dialogue is displayed:

Set Special Meal Qualifications for Tuesday December 7, 2004

Primary Special Meal (Special Hot)

Flag the labels for clients with:

Items other than the default

Select the diet codes to match:

☒ Match Any Selection ☐ Match All Selections

- ☐ Vegetarian - VEG
- ☐ Low Salt - LoSalt
- ☐ Vegetarian - Veg
- ☐ Low Potassium - LoPot
- ☐ Low Acid - LoAcid
- ☐ Small Portion - Small
- ☐ Low Spice - LoSpice
- ☐ Diabetic - Diabetic
- ☐ No Gravy - NoGrav

Secondary Special Meal (Special Cold)

Flag the labels for clients with:

Selected diet restrictions

Select the diet codes to match:

☒ Match Any Selection ☐ Match All Selections

- ☒ Vegetarian - VEG
- ☒ Low Salt - LoSalt
- ☐ Vegetarian - Veg
- ☐ Low Potassium - LoPot
- ☐ Low Acid - LoAcid
- ☐ Small Portion - Small
- ☒ Low Spice - LoSpice
- ☐ Diabetic - Diabetic
- ☐ No Gravy - NoGrav

Copy to Additional Dates

Illustration 133: Set Special Meal Qualifications dialogue

Using this dialogue you can set the specifications, as described above.

NOTE: The special meal specifications for a date can't be deleted. They can be edited, of course, but not deleted.

For those organizations that have a menu on a repeating cycle and therefore have the same restrictions on multiple dates, the ability to copy a set of restrictions to additional dates may be a useful feature. This function enables copying a day's specifications to any number of additional dates. Clicking the **Copy to Additional Dates** button displays this dialogue:

Copy Special Meal Restrictions from Tuesday December 7, 2004

Select the dates to which the restrictions should be copied:

July, 2004 August, 2004 September, 2004

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

Sun	Mon	Tue	Wed	Thu	Fri	Sat
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

Sun	Mon	Tue	Wed	Thu	Fri	Sat
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

Sun	Mon	Tue	Wed	Thu	Fri	Sat
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

Sun	Mon	Tue	Wed	Thu	Fri	Sat
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

Sun	Mon	Tue	Wed	Thu	Fri	Sat
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	1
2	3	4	5	6	7	8

Illustration 134: Copy Special Meal Restrictions dialogue

Dates can be added to the **Selected Dates** list in one of two ways: either a date can be selected in the calendar by clicking on it followed by clicking the **Add Selected Date** button, or you can double-click on a date in the calendar. To remove a date from the **Selected Dates** list, click in the checkbox next to the desired date(s) and then click the **Delete Checked** button. Once the list has been set to the appropriate dates, click the **OK** button to close the dialogue and copy the restrictions to the additional dates. Click the **Cancel** button to close the dialogue without copying any restrictions.

NOTE: The restrictions will only be copied to a date where restrictions do not already exist for that date.

Situations where additional food is delivered on an exceptional basis (i.e., Blizzard Bags)

Occasionally an organization will be required to send additional food to ensure that Clients have enough food for a long weekend, or an organization may send extra food in anticipation of suspension of deliveries due to a storm. In this situation, you will want to create a new delivery item (from the menu select **Edit | Table Maintenance | Meal Items**). Add the new item, and name it *Long Weekend Package* or *Emergency Food*, or some other descriptive name. Under **Number of Credits** be sure to enter the equivalent number of meals for the extra food.

There are now two methods available to include the extra item in the appropriate day's delivery:

1. The simplest way might be to temporarily change the default delivery items. You would assign the new item for delivery to the day of the week you're going to be sending out the extra food, and you'd do this just prior to preparing and saving a set of deliveries. To assign the item for delivery, you would go to **Edit | Table Maintenance | Configuration**. In the Configuration dialogue, select the Meal Deliveries tab. Just about in the middle of the screen there is a box labeled **Default Delivery Items** and a button labeled **Set Items**. Clicking that button opens the dialogue in which you define the items that are delivered, by default, on each day for each service. Select the appropriate service from the drop-down list, then select the appropriate day of the week (Friday, for example, if that's the day the extra food is being sent). Click the **Add Item** button, then select the newly created line in the **Item** column. In the drop-down list select the *Long Weekend Package* (or whatever the new item was named). Close the dialogue. Now, whenever a Friday delivery for that Service is prepared and saved the extra item will be included (and the clients will be credited for those extra meals). Once you've finished preparing, saving and printing the special weekend delivery, you must remember to remove the item from the default delivered items (repeating the Configuration steps).
2. A second way to assign a special item such as this, without having to modify the default delivery items, is to prepare the deliveries for the affected day, followed by saving those deliveries to a **List**. Saving the recipients of the delivery to a List enables you use that list of clients again. For example, to assign one extra item to the Clients, or simply to keep track of who received a delivery on a particular day. In order to use the List and assign the extra item for delivery, the optional ListMaker module must be installed. The ListMaker appears on the **Plug-Ins** sub-menu of the main menu. If the ListMaker is installed, prepare the day's deliveries in the normal fashion. Click the **Save As** button to save the clients to a List. The dialogue for adding members to a list will be displayed, as illustrated below:

Illustration 135: Save Prepared Deliveries to a List dialogue

Select the **New List** tab, and enter a name for the list of clients, such as Long Weekend Delivery and complete the other defaults for the new list. The other options should be set as follows: **Fulfill only to active clients** should be checked, **Confirmed** Checkbox should be irrelevant (Requiring confirmation is normally only used for holiday deliveries when clients are requested to RSVP), **Service to Use** should be set to **Client's Own Service**, **Items to Deliver** should be set to the newly created *long-weekend* item, and the **Quantity** should be set to one (or any other quantity, as appropriate). The other options can be ignored, for the time being.

Having saved the list of clients to a list, that list can now be used to assign an extra item for delivery. Select the **ListMaker** from the Plug-Ins menu, select the appropriate list from all of the available lists, then click **Fulfill** to schedule a delivery to the List. The **List Fulfillment** options dialogue will pop up. Assuming the options were set correctly when the list was created, the only option that needs to be set is to select the correct **Delivery Date** for the extra item. Click **OK**. The ListMaker will iterate through the list and schedule the extra item for each person on the list. The day's deliveries would now need to be prepared and saved in the normal fashion. Each Client receiving a delivery will receive the normal items, plus the item that was added by scheduling a delivery using the ListMaker.

The ListMaker could also be used to retroactively assign the extra item to the clients who received it. To do so, display the **Prepare Deliveries** dialogue as if you were going to prepare a set of deliveries. Right-click and select **Populate Grid with Previously Saved Deliveries** from the context menu. You will be prompted for a delivery date. Select the appropriate date and click **OK**. The grid will be populated with data exactly as last saved for the chosen date. The list of clients can now be saved to a list. Using the ListMaker, that list

can then be used to schedule the additional item for some arbitrary date (perhaps a day on which there are no normal deliveries.) After creating the scheduled delivery using the ListMaker, prepare the deliveries for the arbitrarily selected date, choosing **Scheduled Only** in the delivery type drop-down list. The deliveries that had been created using the ListMaker will be brought into the delivery grid. Click the **Save** button to save the deliveries and credit the Clients appropriately (An alternative method to identify and credit the scheduled delivery recipients might be to use the **Episodic Events to be Credited** dialogue. See “Crediting Scheduled and Episodic Deliveries and Other Events, After the Fact”, Page 119, for information on that feature.)

How to Determine if a Client will receive a delivery for a selected date

The easiest way to determine if a Client will receive a delivery for a given date is to use the **Delivery Verification** utility. The utility can be accessed from the **Utilities | Verify Delivery Conditions** menu or by using the speed-key combination of **Control+Alt+V**. Launching the utility will display the following dialogue:

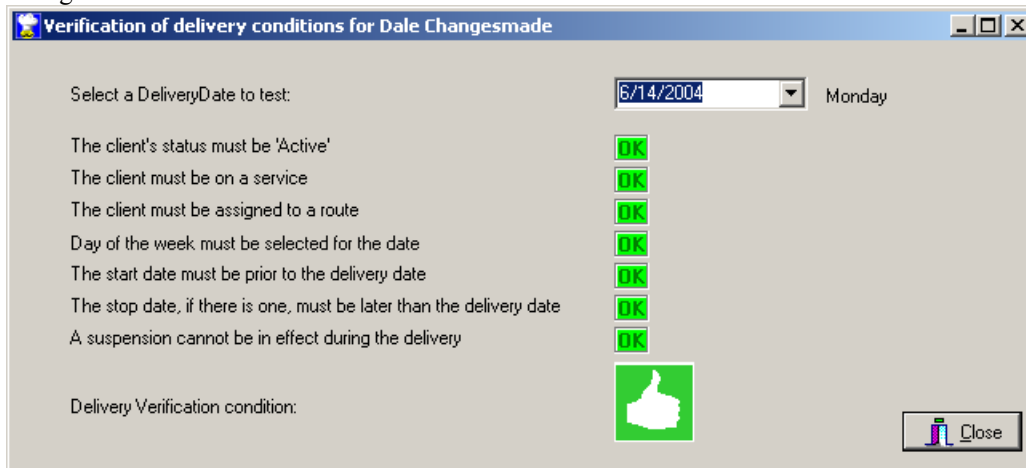


Illustration 136: Verification of delivery conditions dialogue

By selecting a date you'll obtain either a green 'thumbs-up' or a red 'thumbs-down' signal along with the reasons, if any, that a delivery would not be delivered on a given date. Entering a new date to test will automatically refresh all of the conditions.

How to Determine if a Client received a delivery for a past date

The simplest way to determine if a client received a delivery on a date in the past is to look at the Recent Deliveries. The **View Recent Deliveries** button on the **Status/History** tab will launch the following window.

Date	Deliv Type	DOW	Alt Addr	Route	Stop	Number of Meals	Custom Items	Diet	Status
12/7/2004	OD	TUE	<input type="checkbox"/>	CH	2	12	<input type="checkbox"/>		
6/16/2004	OD	WED	<input type="checkbox"/>	CH	1	10	<input type="checkbox"/>		

Select deliveries within this past number of days: Last Delivery: Tuesday, December 7, 2004

Illustration 137: Recent Deliveries screen

By default the previous 45 days' deliveries will be displayed. Deliveries further in the past can be viewed by changing the **Select deliveries within this past number of days** entry and clicking the **Refresh** button.

The **Status** column indicates any extraordinary Status information:

- **C** indicates the delivery was *Comped* (A *Comped* meal is one for which the Client will not be charged.)
- **M** indicates a missed delivery
- **E** indicates an excused missed delivery

Recording a delivery as Comped

A delivery that has been Comped will not be charged to the client (if and when invoices are generated). Deliveries are Comped on the **View Recent Deliveries** screen. To display the View Recent Deliveries screen, select the **Status/Dates** tab, then click the **View Recent Deliveries** button. The following screen will be displayed. Notice that a delivery that has been comped will display C in the Status column:

Recent Deliveries										
Date	Deliv Type	DOW	Alt Addr	Route	Stop	Number of Meals	Custom Items	Diet	Status	
9/1/2004	OD	WED	<input type="checkbox"/>	01	22	0	<input checked="" type="checkbox"/>			
7/28/2004	OD	WED	<input type="checkbox"/>	01	22	1	<input checked="" type="checkbox"/>		C	
7/20/2004	OD	TUE	<input type="checkbox"/>	01	22	1	<input checked="" type="checkbox"/>			
7/16/2004	OD	FRI	<input type="checkbox"/>	01	22	1	<input checked="" type="checkbox"/>			
7/14/2004	OD	WED	<input type="checkbox"/>	01	22	1	<input checked="" type="checkbox"/>			
7/13/2004	OD	TUE	<input type="checkbox"/>	01	22	0	<input checked="" type="checkbox"/>			
7/9/2004	OD	FRI	<input type="checkbox"/>	01	22	1	<input checked="" type="checkbox"/>			
7/6/2004	OD	TUE	<input type="checkbox"/>	01	22	0	<input checked="" type="checkbox"/>			
6/25/2004	OD	FRI	<input type="checkbox"/>	01	22	0	<input type="checkbox"/>			
6/23/2004	OD	WED	<input type="checkbox"/>	01	22	0	<input type="checkbox"/>			

Select deliveries within this past number of days:
 Last Delivery: Wednesday, September 1, 2004

Illustration 138: Recent Deliveries displaying a Comped delivery

Right-clicking on the deliveries screen will display a context menu, on which two of the choices are

- **Comped Delivery**
- **Reverse Comped Delivery**

Selecting **Comped Delivery** will display a calendar showing the date for the selected delivery:

Comped Delivery

July, 2004

Sun	Mon	Tue	Wed	Thu	Fri	Sat
27	28	29	30	1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31
1	2	3	4	5	6	7

Today: 8/1/2004

Reason:

Recorded By:

System Administrator

Illustration 139: Comped Delivery dialogue

You may enter a reason for which the delivery is being comped. Clicking **OK** will comp the selected delivery and close the dialogue. Clicking **Cancel** will close the dialogue without comping the delivery.

Once a delivery has been comped, the comping can be reversed by selecting **Reverse Comped Delivery** from the context menu. You will be asked to confirm that you wish the comping of the delivery to be reversed. Clicking **Yes** will remove the comped status from the delivery. Clicking **No** will leave the comped delivery as is.

Deleting a Name from the database

You may delete any person's record in the database. Select the person to be deleted, so that they are the current record on the main Clients screen, and then select **Edit | Delete current person** from the main menu. You will be prompted to confirm the deletion, and clicking **Yes** in that dialogue will allow the deletion to proceed. Clicking **No** will cancel the deletion process. Upon deleting a name the MealService will also delete any related information, such as Meal Credits, Relationships, Counseling Sessions, etc.

△ Deleting a name is irreversible!

Creating and Managing Alerts and Follow-Ups

Alerts and Follow-Ups are dated reminders that can be created for yourself and others in the organization. Alerts are quite flexible: you can assign more than one recipient to an Alert, you can assign priority levels, completion status, and categories to alerts. Alerts are primarily created and managed on the Browse Alerts screen, but Alerts can also be created by attaching an Alert to a new, or existing, Client Note. Attaching an Alert to a Note is useful for those situations where you may need to follow up on a comment you made in a note.

To display the Browse Alerts screen, select **Edit | Alerts and Follow-Ups** from the main menu, or press the speed key combination of **Control+F**. The screen appears as shown in "Illustration 140: Browse Alerts screen":

Browse Alerts/Reminders											
Client Name		Client Status	Subject	Category	Department	Responsibility	Alert Date/Time	Priority	Compl Status	Staff Member	Created
First	Last										
Mort	Alove	I	Change service to Hot			Owner	1/1/2005	High		Danny Stewart	6/18
Mort	Alove	I	Change service to Hot			Delegate	1/1/2005	High		John Dixon	6/18
Mort	Alove	I				Owner	8/31/2004			Danny Stewart	6/18
Mort	Alove	I	Verify intake.	Intakes		Delegate	6/18/2004			Mary Scott	6/18

Illustration 140: Browse Alerts screen

The Browse Alerts screen consists of a grid displaying the Alerts, and several buttons and other controls along the bottom of the screen. There is also a context menu accessible by right-clicking on the grid.

The screen, when first displayed, defaults to a 'Filtered' view. The filter limits the visible Alerts to those where the user is a *Creator*, *Owner*, *Carbon-Copy* or *Delegate* of an alert and the completion status is any other than *Complete*. The alerts will be sorted in reverse chronological order, and those that are currently due (Alert Dates from today's date to seven days in the past) will be highlighted in **yellow**. Those that are over-due (Alert Dates older than seven days but less than a year old) will be displayed in **red**. To remove the filter and display all of the alerts, simply remove the checkmark from the box labeled **Filter: On** at the bottom of the screen (See "Filter box" on Page 132 in this section, for additional information on the behavior of the filter).

The Browse Alerts screen offers several ways to manage the existing Alerts. For example, clicking on any of the column headings of the grid will sort and group the Alerts on that column. Grouping is the feature where an underscore will be drawn between changes of an entry in a column. For example, if the column is sorted on Client Status, all of the Alerts for Clients with a status of A (for Active) will be sorted first. A line will be drawn after the last client with a status of A and before the first client with the next visible status, which might be I (for Inactive).

Along the bottom of the screen are *VCR* buttons for navigation, buttons labeled **Add**, **Edit**, **Delete**, a box labeled **Search Options**, a box labeled **Filter**, and a **Reports** button. Here are explanations of each:

The **Add** button is used to create a new Alert. The **Edit** button is used to edit the Alert currently selected in the grid. When either is clicked, the dialogue as shown in "Illustration 141: Edit Follow-Up/Alert Reminder dialogue" will be displayed. See the instructions in the section labeled "Creating an Alert/Follow-Up" for instructions on creating an Alert.

Clicking the **Delete** button will delete the Alert currently selected in the grid. The **Delete** button will only be enabled when the MealService user is the creator of or has a responsibility of Owner for the Alert currently selected in the grid.

The **Search Options** box enables searching on several different indexes. To choose an index on which to search, select it from the drop-down list. Typing into the edit field in the **Search Options** box will cause the cursor in the grid to jump to the record that most closely matches what has been typed. For example, if First Name is selected in the drop-down list then the grid will be sorted by First Name. Typing J will select the first record where the first name begins with J. Then typing O will select the first record where the first name begins with JO, and so on. (While this example is displayed in upper case, the search is not case sensitive.)

The **Filter box** determines whether a filter will be applied to the Alerts in the grid. When the filter box is checked (or On), the Alerts are limited to those where the user is a *Creator*, *Owner*, *Carbon-Copy*, or *Delegate* of an alert and the status of the alert is other than *Complete*. Removing the checkmark turns off the filter, in which case all alerts for all users are visible.

The Reports button will launch the **Alerts/Follow-Up Reports** dialogue (see “Illustration 157: Alerts/Follow-Up Reports dialogue”), in which various parameters can be set to control which records will be included in the selected Alerts report. For instructions on using the dialogue, see “Alerts/Follow-Up Reports”, Page 144.

Creating an Alert/Follow-Up

Create an *Alert/Follow-Up* by selecting **Edit | Alerts and Follow-Ups** from the main menu (or by using the speed-key combination of **Control+F**) and then clicking the **Add button** in the resulting dialogue. The **Follow-Up** dialogue will be displayed, as shown in the following illustration:

Staff Member	Responsibility
Danny Stewart	Owner
John Dixon	Delegated To

Illustration 141: Edit Follow-Up/Alert Reminder dialogue

The **Client** edit field is shown with a look-up ellipsis when first creating an Alert, as illustrated here:



Illustration 142: Client field with look-up ellipsis

The alert will default to the Client currently displayed on the main Client edit screen. A different Client can be selected for the alert by clicking on the ellipsis button (...) on the right side of the edit field. Clicking on the ellipsis button launches a **Client lookup** dialogue:

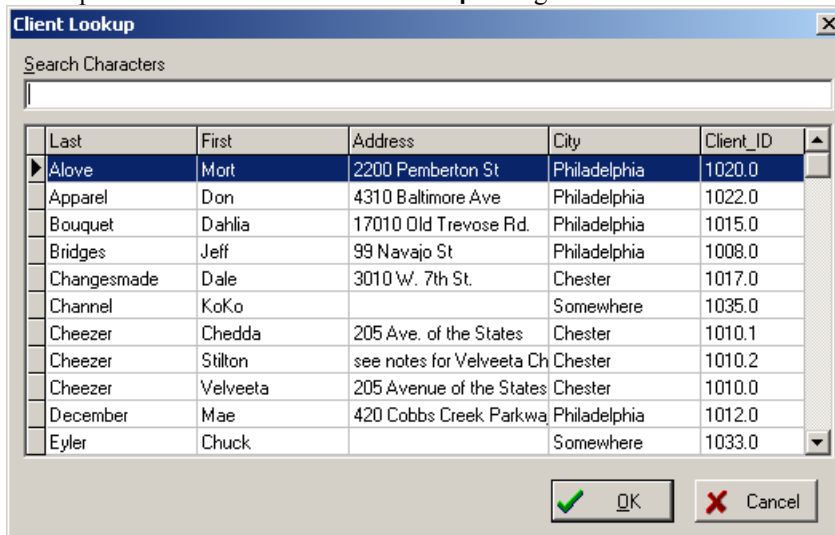


Illustration 143: Client Lookup dialogue

In the Lookup dialogue, typing into the **Search Characters** edit field will select the Client with the Last Name most closely matching what has been typed. Once the desired Client has been located, double-click on the row containing the Client's name or click the **OK** button to select the Client and close the dialogue. Click the **Cancel** button to close the dialogue without selecting a Client.

NOTE: A client name does not need to be assigned to an Alert. You might want to simply remind yourself of a task, unrelated to any clients, due on a certain date. You might also simply want to assign the Alert to a Department.

Once the **Edit Follow-Up Alert/Reminder** dialogue is closed and the alert has been saved, the Client name can't be changed. Because of that, when the **Edit Follow-Up Alert/Reminder** dialogue is subsequently displayed the ellipsis (which launches the Client Lookup) is no longer visible, as shown here:



Illustration 144: Client field, not editable

The Alert can be assigned to one or more recipients. To add a recipient, click the **Add Recipient** button. A blank row will be created in the **Staff Member** column. The entry in the **Responsibility** column will default to **Owner**. You may change the recipient by selecting a name from the Staff Member drop-down list. You may also change the Responsibility by selecting one of the choices from the drop-down list. The available choices are: **Owner**, **Delegated To**, and **Carbon Copy**. A recipient need not be assigned to an alert, but once the Add Recipient button has been clicked either a recipient must be specified or the blank row removed from the alert.

NOTE: Only the creator of an alert or a Recipient with the responsibility of Owner may Edit or Delete an Alert.

The **Department**, **Subject** and **Category** entries are optional, and may be completed as desired. The **Note** edit box allows for unlimited text, and the text can be formatted using bold, italics, and other font

characteristics. To apply formatting, select the text you wish to format and then right-click to display the context menu. Select one of the formatting choices (**Font**, **Bullet Style**, **Paragraph**, **Tabs**) from the context menu. An optional **Priority** can be assigned by selecting one of the choices in the drop-down list. The available priority choices are **Low**, **Normal**, and **High**. In the field labeled **Alert Date/Time** you must select a date on which to be reminded of the alert. You may, optionally, enter a time. Both the date and time will auto-format based upon your date/time preferences in Windows. Select an optional Status from the **Status** drop-down list. Available choices are **Not Started**, **In Progress**, **Completed**, and **Deferred**. Finally, click **OK** to save the changes to the Alert or click **Cancel** to close the Alert without saving your work.

NOTE: The **OK** button will not become enabled until an alert date has been assigned.

See Also

Alerts/Follow-Up Reports, Page 144

Creating a Filtered Mail-Merge File

The *Filtered Mail-Merge* is typically used to send letters to clients, or perhaps to create a set of mailing labels for a particular subset of clients. The mail-merge will only include those clients who match the current *Filter*. There are two filters: the *Status Filter* (in which you can select only Active Clients to be displayed, for example) and the *Custom Filter* (in which very sophisticated filters can be created on multiple conditions).

The first step is to create the appropriate filter. Follow the directions elsewhere in the manual on how to create a filter. Once the appropriate filter has been applied, the mail-merge file can be created. To do so, select **Reports | Mail-Merge | Filtered Clients** from the menu. The *Mail-Merge* dialogue will be displayed:

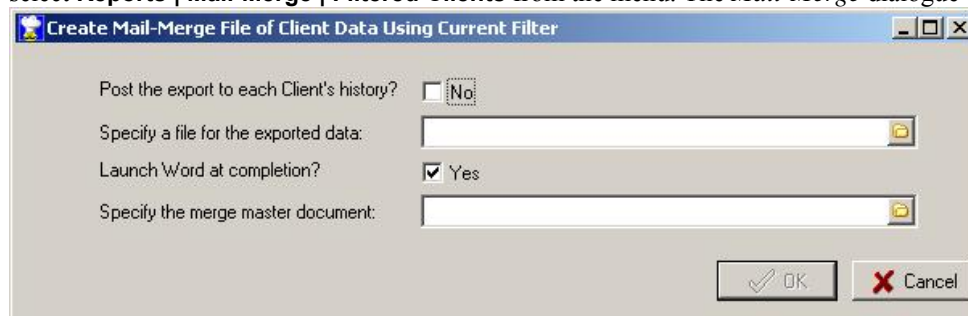


Illustration 145: Create Mail-Merge options dialogue

The options on this screen serve the following functions

Post the export to each Client's history? This defaults to **No**. Clicking in the box will change it to **Yes**.

When set to Yes, the following entry will be added to the *History* file of each client included in the merge: *Client data exported to mail-merge file*.

Specify a file for the exported data: The file name can be typed into this edit box, or click the yellow file-folder button (□) to launch a Windows Explorer dialogue to select a location and supply a file name.

Launch Word at completion? This is a convenience for the user, and it defaults to **Yes**. If you will be using Microsoft Word to perform the merge, leave the checkbox as is. If you do not wish to launch Word automatically, immediately after the creation of the merge, click the box to change it to **No**.

Specify the merge master document: This is also a convenience for the user. If you wish to have a document loaded into Word when it is launched, type in the name of the file, or click the yellow file-folder button (□) to launch a Windows Explorer window to select the file name.

Once the options have been set as desired, click the **OK** button. The mail-merge will be performed, and the specified mail-merge file will be created. The mail-merge file will include the field names in the file, so no header file need be specified in Word. Click **Cancel** to close the dialogue without creating a merge file.

Upon the completion of creating the merge file, the filter can be cleared if desired. In the section of this

manual on creating the filter you chose (either Status Filter or Custom Filter), follow the instructions on removing the filter.

See Also

Status Filter, Page 85

Custom Filter, Page 86

Upon the completion of creating the merge file, don't forget to remove the filter that had been applied (if any).

Creating a Custom Mail-Merge File

The *Filtered Mail-Merge* is an easy way to export Client data. When using the Filtered Mail-Merge you are limited to Client information, however. The Custom Mail-Merge gives you access to any MealService data by using queries that you write or that you have had written for your organization. Queries that you might wish to use for export are stored in the System Queries table. Any queries that you create and that include Select, Export or Merge as part of the query name will be available for use in the Custom Mail-Merge dialogue.

The Custom Mail-Merge dialogue appears as follows:

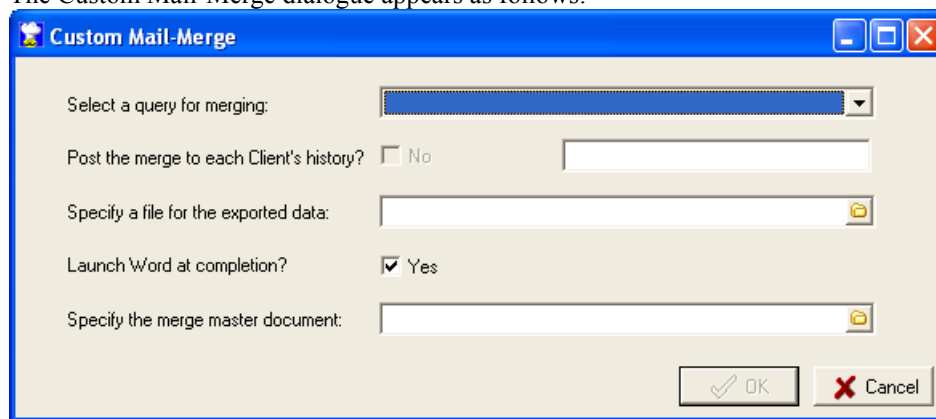


Illustration 146: Custom Mail-Merge dialogue

The options on this screen serve the following functions

Select a query for merging drop-down list: Select an entry from the list to be used for the export. The entries in the list are those system queries that contain *Select*, *Export*, or *Merge* as part of their name. Query statements in this dialogue can support one run-time parameter. See the instructions on the Execute Query utility on page 174 for details on how parameters are defined.

Post the merge to each Client's history? This defaults to **No**. Clicking in the box will change it to **Yes**.

Entry to read: The entry to be logged to the History table can then be specified in the adjacent edit box. This checkbox will only be enabled if the dialogue believes that the Person ID field is one of the fields selected as part of the query.

History entry edit box (normally unlabeled. Labeled **Entry to read:** when the *Post the merge to history* checkbox is checked.) For example, you might want the following entry added to each recipient of the merge: *Saturday suspension letter merged*, and you would specify that entry in this edit box.

Specify a file for the exported data: The file name can be typed into this edit box, or click the yellow file-folder button (□) to launch a Windows Explorer dialogue to select a location and supply a file name.

Launch Word at completion? This is a convenience for the user, and it defaults to **Yes**. If you will be using Microsoft Word to perform the merge, leave the checkbox as is. If you do not wish to launch Word automatically, immediately after the creation of the merge, click the box to change it to **No**.

Specify the merge master document: This is also a convenience for the user. If you wish to have a document loaded into Word when it is launched, type in the name of the file, or click the yellow file-folder button (□) to launch a Windows Explorer window to select the file name.

If you are competent in writing SQL queries you can simply type the appropriate statement into a System

Queries record. If you are not comfortable with writing SQL statements, most queries designed in the Query Builder (see “Query Builder”, page 147) can be utilized in the Custom Mail-Merge. Simply create a query using the Query Builder, then copy the resulting Select statement from the SQL tab and paste it into a System Queries record.

See also

Maintaining System SQL Queries, page 38

Execute Query, page 174

Query Builder, page 147

Creating Mail-Merge Client Invoices

This menu option will generate a mail-merge file that can be used to print client invoices. (The mail-merge file could also be opened in Microsoft Excel, if the data is to be manipulated prior to import into an accounting package.) Creating the client invoices using mail-merge gives your organization the ability to print the invoice on your organization’s letterhead, and to format the invoice as you see fit. (MealService comes with a sample merge invoice template to get you started.) Clients can be billed for the cost of their meals and/or for pledges that they have made. Pledges can be made on a per-item basis or on a per-day basis (for example, a client might have pledged \$2.50 for every day that they received a delivery or they might have pledged \$5.00 towards the cost of every case of nutritional supplement that they received.)

The mail-merged invoices *do not* give you the ability to bill third-party funders or to send monthly reminders if an invoice is outstanding. If you require features such as monthly statements for clients who have outstanding invoices and aged accounts receivable reports, you should request information on the MealService BillMaker plug-in. BillMaker is a complete accounts receivable module.

To create an invoice mail-merge file, from the menu select **Reports | Mail-Merge | Client Invoices**. The following dialogue will be displayed:

Export Client Pledge Solicitation and Invoice Data

Select the Start Date of the period: 12/1/2004

Select the Ending Date of the period: 12/31/2004

☒ Include all delivered items
☐ Include only this/these item(s)
☐ Exclude this/these item(s)

☐ Breakfasts [B]
☐ Lunches [L]
☐ Dinners [D]
☐ Snacks [S]
☐ Other Meals [O]

Calculate the amount by using: Cost per item

Post the bill to Client History? ☒ Yes

Starting Invoice Number:

Specify a file for the exported data:

Launch Word at completion? ☒ Yes

Specify the merge master document:

OK Cancel

Illustration 147: Client Pledge Solicitation and Invoice Data options dialogue

The options available on this dialogue are as follows:

- **Select the Start Date of the period** – Any delivered items, on or after this date will be included in the invoices.
- **Select the Ending Date of the period**– Any delivered items, on or prior to this date, will be included in the invoices.
- **Item Inclusion radio buttons** and the **Meal Categories and Items tree**: the choices available are:

- **Include all delivered items** – Selecting this option will make all items delivered to the client eligible for invoicing.
- **Include only this/these items** – Selecting this option will limit the items eligible for invoicing to those checked in the list of items. See Illustration 148 for an illustration of including only Medical Food and Specialized Medical Food. Notice that items can be chosen by category (Dinners or Medical Food, for example) or by specific item (such as Frozen Dinner or Strawberry Boost.) The category under which an item appears is determined by the Meal or Category the item has been assigned in the Edit Meal Items dialogue. See “Screen 12: Meal Items”, on page 29 for a description of the Meal Items dialogue.
- **Exclude this/these items** – If most items are to be eligible for invoicing and only a few are to be excluded, this option will make the job simpler. Select this option and then simply enter a checkmark for the few items that are *not* to be included.

As an example of selecting specific items for inclusion, in this illustration only Medical Food and Specialized Medical Food will be included in the invoices:

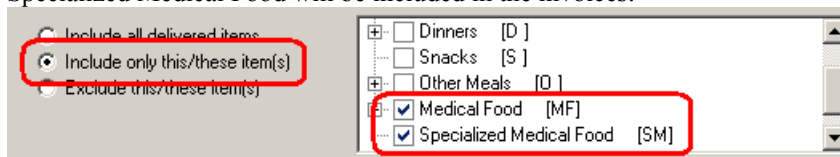


Illustration 148: Selecting specific items for invoicing

- **Calculate the amount by using** drop-down list– Available choices include:
 - **Cost per Item** – This option will calculate the amount for each delivered item based on the Default Charge specified in the Edit Meal Items dialogue. (See “Screen 12: Meal Items”, on page 29 for a description of the Meal Items dialogue.) Any items from a *Comped* delivery will appear as a line item with a cost of zero. (See “Recording a delivery as Comped”, page 128, for information on how to *Comp* a delivery.)
 - **Pledged Amount** – This option will calculate the amount to be invoiced based upon the client’s pledges. When this option is selected an additional drop-down list becomes visible, as shown:

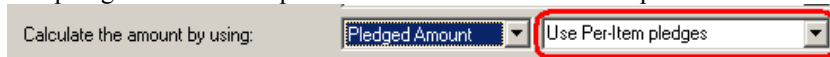


Illustration 149: Pledge calculation method drop-down list

- **Pledge calculation method** drop-down list – Available choices include:
 - **Use Per-Item pledges** – This option will generate invoices that utilize any pledges for specific categories or items. For example, a client might pledge \$5 per case of nutritional supplements. If, in the course of the selected time period that client received one case of Boost and one case of Magnacal the pledges would total \$10.
 - **Use Per-Item & Per-Day pledges** – This option will generate invoices for those clients who have made pledges for specific categories or items, as well as any pledges per day. For example, if a client pledged \$1 per day of delivery and \$5 per case of nutritional supplement, and he or she received 25 days of deliveries and one case of Boost, then he would receive an invoice with two line items: 25 days at \$1 and 1 case of nutritional supplement at \$5.
 - **Use Monthly pledges** – This option will generate invoices using any pledges clients may have made at the monthly level. For example, if you have a client who has pledged \$25 per month, that client would receive an invoice with one line item. That line item would read ‘Monthly pledge of \$25’.
 - **Use Yearly pledges** – This option will generate invoices similar to Monthly pledges, except that it will only include those clients who have made a yearly pledge. The line item would read ‘Yearly pledge of \$250’.

In all of the above Pledge cases, any items from a *Comped* delivery will appear as a line item with a pledge amount of zero. (See “Recording a delivery as Comped”, page 128, for information on how to *Comp* a delivery.)

- **Post the bill to Client History?** checkbox – This defaults to Yes. Clicking in the box will change the label to No. When set to Yes, an entry similar to the following will be added to the *History* file of each client receiving an invoice as part of the merge: *Bill exported, 12/1 - 12/31/2003- \$16.00.*

- **Starting Invoice Number** – This edit field will allow you to specify the starting invoice number. If you specify a starting number, it will be assigned to the first invoice and each subsequent invoice number will be incremented by one. If you do not assign a starting invoice number, the invoices will be numbered starting with one. The invoice number can be a combination of alpha as well as numeric characters. For example, you can specify “MS1001” as the starting invoice number. In this case, the second invoice generated would be assigned the number MS1002, and so on. The alpha characters must always precede the numeric portion of the invoice number.
- **Specify a file for the exported data** – The file name can be typed into this edit box, or the yellow file-folder button can be clicked to launch a Windows Explorer dialogue to select a location and supply a file name.
- **Launch Word at completion?** checkbox – This is a convenience for the user, and it defaults to Yes. If you will be using Microsoft Word to perform the merge, leave the checkbox as is. If you do not wish to launch Word automatically, immediately after the creation of the merge, click the box to change it to No.
- **Specify the merge master document** – This is also a convenience for the user. If you wish to have the invoice master document loaded into Word when it is launched, select that file name with this edit box.

Once the options have been set as desired, clicking the **OK** button will initiate the mail-merge file creation process. Click the **Cancel** button to close the dialogue without exporting any data.

The process will check all of the items designated to be eligible for billing. If a client has received any of those items, it will then calculate the invoice amount based on the billing method for that item (that is, by default item cost, by pledged amount, etc.) Once all of the items for a client have been calculated, an invoice will be created if the total invoice amount is other than zero.

The invoice will be addressed to the client, unless a *Bill-To* addressee has been designated. *Bill-To* addressees are created using *Relationships*. One of the relationship types is *Bill-To*. Designating one of a client’s relationships as a *Bill-To* will cause that client’s invoices to be addressed to the *Bill-To* individual rather than to the client. Only one *Bill-To* relationship can be used per Client. If more than one exists for a client, the first *Bill-To* relationship located during the billing process will be the one used.

Note: The mail-merge invoice allows for up to 10 line items. Any line items over 10 will not be included.

Chapter 6: Analyzing and Printing Information

Delivery Reports

Delivery Reports are those that pertain to deliveries: they include route sheets, delivery labels, kitchen counts, and other delivery- and meal count-related reports.

The **Select the Delivery Report** dialogue can be launched from two locations: by selecting **Reports | Print | Delivery Reports | Delivery Reports and Labels** from the main menu, or by clicking the **Print Report** button on the Delivery preparation screen. Either case will generate the following dialogue.

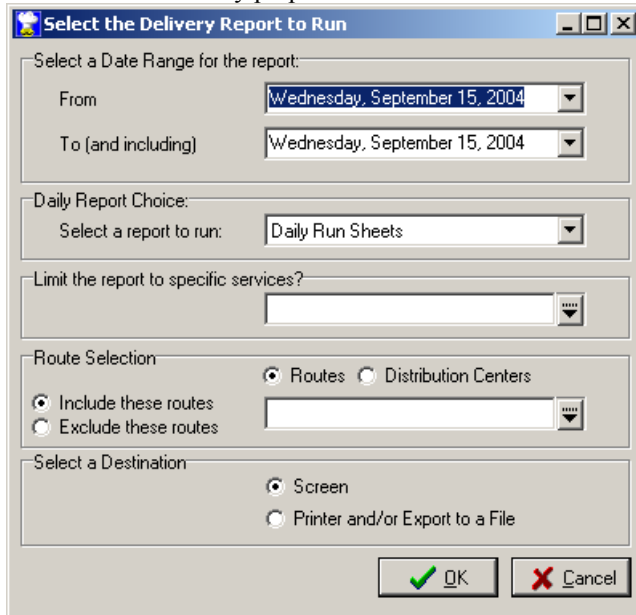


Illustration 150: Delivery Report selection dialogue

The **From** and **To** dates select the range of dates to be included in the report (both fields default to the current date). The **To** date must be equal to or later than the **From** date. You will notice that as you advance the From date into the future, if the From date exceeds the To date, the To date will automatically increment so that it is always at least equal to the From date.

The **Select a report to run** drop-down lists the available standard reports. In this case, the **Daily Run Sheets** is the report about to be run. (The Daily Run Sheets is the report that lists clients scheduled for a delivery, with their meal items and delivery instructions.) The report choices are listed below.

Limit the report to specific services? Drop-down checklist allows limiting the output to selected Services. If no selection is made, *All Services* will be included. The drop-down checklist (with its context menu) appears as follows:



Illustration 151: Services drop-down checklist

As many Services as required can be selected. Notice that the context menu offers functionality to Select or DeSelect all of the choices.

The **Route Selection** drop-down checklist allows limiting the output to selected Routes or routes assigned

to Distribution Centers. Whether Routes or Distribution Centers are chosen depends upon which of the following radio buttons are selected:

- Routes
- Distribution Centers

In the following illustration, Distribution Centers is selected.

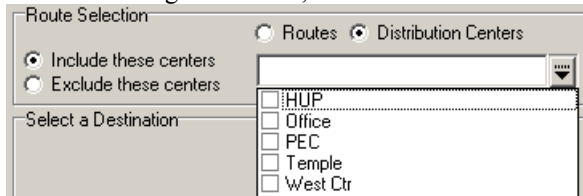


Illustration 152: Routes and Distribution Centers radio buttons

When Distribution Centers is selected, those routes that have been assigned to the selected distribution center(s) will be chosen for inclusion in the report. (See “Screen 14: Routes”, Page 30, for information on assigning a route to a distribution center.)

If no selection is made in the checklist, *All Routes* will be included (If every route is chosen in the drop-down list then, it is the equivalent of having selected none of them, since the result will be the same: all will be included). As with the Service checklist, there is a context menu:

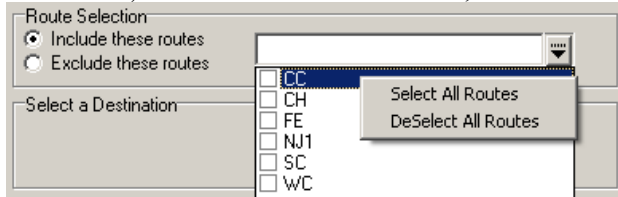


Illustration 153: Route selection drop-down checklist

Once specific Routes or Distribution Centers have been selected, you have the option to either include or exclude them. This option is selected by choosing one of the appropriate radio buttons, which are labeled:

- Include these routes
- Exclude these routes

The **Select a Destination** radio buttons determine how the report will generated. You may preview the report on-screen (and subsequently print it, if desired) by selecting **Screen**, or you can send it directly to the printer without first previewing it by selecting **Printer**.

The report choices on this screen are:

- **Daily Run Sheets:** a report, intended for use by a driver, listing all clients scheduled for a delivery, with all of the relevant delivery information (name, address, diet, route, stop, etc.)
- **Daily Labels:** a report formatted to fit on Avery 5162 1.33” x 4” (or similar) label stock (in areas of the world using A4 paper, Avery L7163). The label has options to limit the labels to certain populations. See the **Label Selection Criteria** dialogue later in this section.
- **Labels with Preferences:** this report is formatted to fit on Avery 5164 3.33” x 4” (or similar) label stock (in areas of the world using A4 paper, Avery L7166). The label is similar to the Daily Labels, with the extra inclusion of the free-form Client Preferences/Dislikes.
- **Delivery Labels with Addresses:** this report is formatted to fit on Avery 5163 2” x 4” (or similar) label stock (in areas of the world using A4 paper, Avery L7173). This label is similar to the Daily Labels, with the addition of the Client address appearing on the label.
- **Detailed Info for One Service:** this report specifies the details for a specific service, by item and quantity.
- **Client Count by Route and Diet Type**
- **Client Count by Diet Type and Route**
- **Client Count by Route, Service and Diet**
- **Item Count by Center, Route, Service and Diet**
- **Item Count by Center, Route, Service and Diet crosstab**

- **Item Count by Diet, Center, Route, Service**
- **Item Count by Diet, Center, Route, Service** crosstab
- **Item Count by Item, Diet, Center, Route, Service**
- **Item Count by Item, Diet, Center, Route, Service** crosstab
- **Item Count by Route, Item, Cuisine, Diet**
- **Birthdays:** This report lists those clients with birthdays in the specified month, with their birth date, default route and alternate routes (if any). **NOTE:** The starting and ending dates for this report must fall in the same month: it cannot span months.
- **Summarized Demographic Meal Count**
- **Kitchen Counts** crosstab: This presents a detailed breakdown of the number of meal items required by diet code.
- **Kitchen Counts** Report: The data is identical to that of the Kitchen Counts Crosstab, but the output is formatted as a conventional report rather than as a crosstab.
- **Kitchen Client Counts by Standard or Special Diets** crosstab. This report subtotals the counts of clients receiving *Special* meals and standard meals, by Service, for each of the *Special* meals.
- **Kitchen Item Counts by Standard or Special Diets** crosstab. This report subtotals the counts of a single specified item by those requiring *Special* meal modifications and standard meals, by Service, for each of the *Special* meals.
- **Kitchen Container Size Report:** This report attempts to identify all child- or small-sized portions scheduled for delivery, and presents a report specifying the number of regular and small containers required for a given range of dates.
- **Child Demographic Meal Count**
- **Item and Delivery Details by Client:** this report lists the items prepared, by day, for all clients who have received deliveries within the selected time period.

Once all of the options have been set as desired, click **OK** to display or print the report, or click **Cancel** to close the dialogue without generating a report.

After clicking **OK**, some of the above reports may display additional dialogues to further refine the deliveries and/or Clients to be included. One dialogue of note is the **Label Selection** dialogue. When selecting one of the three labels, the following **Label Selection and Sorting Criteria** dialogue will be displayed:

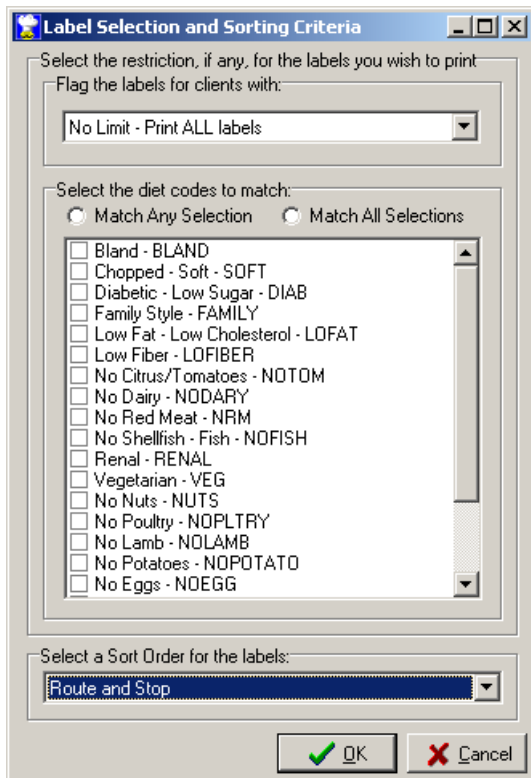


Illustration 154: Label Selection and SortingCriteria dialogue

This dialogue determines how the data will be filtered for inclusion (therefore which labels will be printed), and how the labels will be sorted.

The **Flag the labels for Clients with** drop-down list determines how the selection for inclusion will be made. The choices are:

- **No Limit – Print ALL Labels** — This choice will print all of the labels and will not limit them in any way.
- **Special Meal 1** — This choice will only print labels for Clients who were flagged to receive the first of the two Special Meals.
- **Not Special Meal 1** — This choice will print the labels for all Clients *except those* who were flagged to receive the first of the two Special Meals.
- **Any diet restriction other than Special Meal 1** — This choice will print the labels for all Clients with any diet restriction, as long as the Client was not flagged to receive the first of the two Special Meals.
- **Special Meal 2** — This choice will only print labels for Clients who were flagged to receive the second of the two Special Meals.
- **Not Special Meal 2** — This choice will print the labels for all Clients *except those* who were flagged to receive the second of the two Special Meals.
- **Any diet restriction other than Special Meal 2** — This choice will print the labels for all Clients with any diet restriction, as long as the Client was not flagged to receive the second of the two Special Meals.
- **Any Special Meal** — This choice will only print labels for Clients who were flagged to receive either of the two Special Meals.
- **Any diet restriction** — This choice will print labels for any Clients who have any diet restriction of any kind.
- **Selected diet restrictions** — This choice will print labels for any Clients who have diet restrictions matching the choices in the **Diet Codes to match** checklist. When this option is chosen, two additional refinements can be made using the radio buttons:
 - **Match Any Selection** — When this button is selected, any Client who has at least one matching Diet to those checked in the list, will be included. This option is equivalent to putting a Boolean

Or between each of the diets: matching Clients can have Vegetarian Or Renal Or Low Salt.

- **Match All Selections** — When this button is selected, only those Clients whose diet restrictions exactly match the selections will be included. This option is equivalent to putting a Boolean And between each of the diets. For example, if Low Potassium, Low Spice and Low Salt were checked, only Clients who had Low Potassium *And* Low Spice *And* Low Salt diets would be included.
- **Items other than the default** — This choice will include any Clients who are receiving any combination of items other than the default items for their Service.
- **Select a Sort Order for the labels** — This drop-down list allows selecting the order in which the labels will be printed. The order chosen will be remembered (by MealService user), and will be presented as the default the next time labels are printed by that same user. The available choices are:
 - **Route and Stop.** This is the default, so that the labels will print in the order of the Route sheets.
 - **Client ID**
 - **Last Name / First Name**

NOTE: The box labeled **Select the diet codes to match** remains disabled unless the Selected Diet Restrictions choice is selected in the drop-down list.

➤**TIP**➤ Most reports can have their output exported to several formats, in addition to being sent to the screen or printer. To export a report, select *Print*, as if you were going to print the report. In the resulting printer-selection dialogue, note the *Print to File* checkbox, as illustrated below.

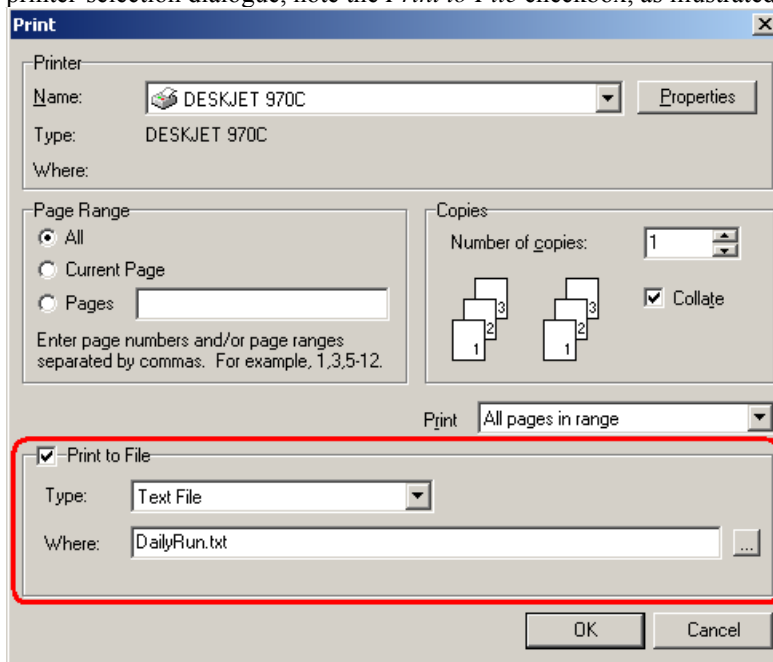


Illustration 155: Printer selection dialogue, illustrating Print to File option

Checking the *Print to File* box will send the report contents to a file. Some of the export formats available in the *Type* drop-down list include Excel and Adobe PDF. Creating PDF copies of daily reports is one method of retaining archival copies of a report, if copies of each report need to be retained.

Samples of delivery reports are included later in this document.

See Also

Avery Labels used by Delivery Reports, Page 207
How to Create a Delivery Report, Page 116

Counseling Reports

Display the **Counseling Reports** dialogue by selecting **Reports | Print | Counseling Reports** from the main menu. The Counseling Reports dialogue appears as follows:

Illustration 156: Counseling Reports dialogue

Counseling Reports are those that pertain to Nutritional Counseling events.

The **From** and **To** dates select the range of dates to be included in the report (both fields default to the current date). The **To** date must be equal to or later than the **From** date. You will notice that as you advance the **From** date into the future, if the **From** date exceeds the **To** date, the **To** date will automatically increment so that it is always at least equal to the **From** date.

The **Select a report to run** drop-down lists the available counseling reports. In this example, the **Summary of Statistics with Demographics** is the selected report. The report choices are listed below.

Limit to a Selected Events: Drop-down checklist allows limiting the output to selected Counseling Event types. If no selection is made, *All Events* will be included.

Limit to Selected Locations: Drop-down checklist allows limiting the output to selected counseling locations. If no selection is made, *All Locations* will be included.

Include these locations and **Exclude these locations:** When a selection has been made in the **Limit to Selected Locations** checklist, the selections can either be included or excluded from the results by using the Include and Exclude radio buttons.

The **Select a Destination** radio buttons determine how the report will be presented. You may preview the report on-screen (and subsequently print it, if desired) by selecting **Screen**, or you can send it directly to the printer without first previewing it by selecting **Printer**.

The report choices on this screen are:

- **Summary of Statistics with Demographics**
- **Summary of Sessions by Counselor**

Once all of the options have been set as desired, click **OK** to display or print the report, or click **Cancel** to close the dialogue without generating a report.

➤**TIP**➤ Most reports can be exported to other formats such as Excel. See the tip beginning with “Most reports can have their output exported to several formats” on Page 143 for information on this functionality.

Alerts/Follow-Up Reports

Display the **Alerts/Follow-Up Reports** dialogue by selecting **Reports | Print | Alerts/Follow-Up Reports** from the main menu. It can also be displayed by clicking the **Reports** button on the **Alerts/Follow-Up** screen. The Alerts report dialogue appears as follows:

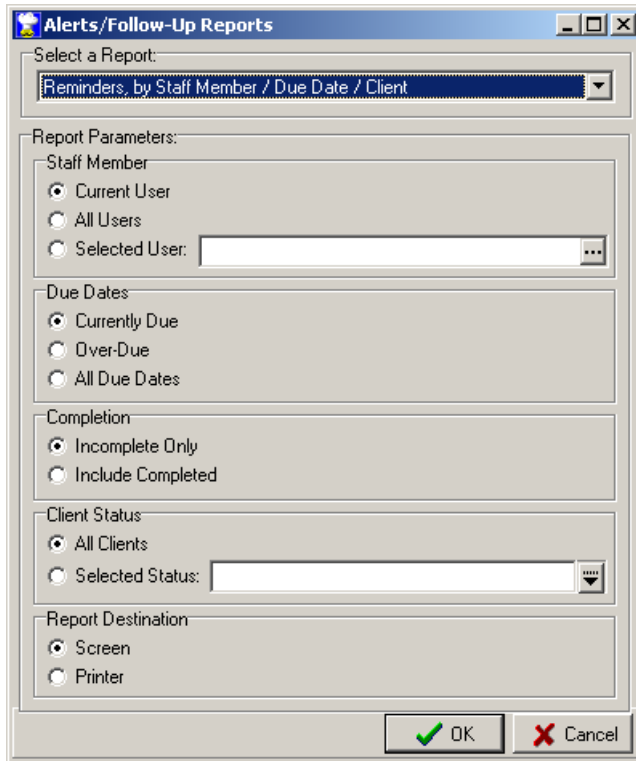


Illustration 157: Alerts/Follow-Up Reports dialogue

The Report Parameters include the following choices:

Staff Member — the choices are **Current User** (based upon the user who is signed into MealService), **All Users**, and **Selected User** (in which case a specific user can be chosen from the lookup dialogue). The staff member will be included in the report output if they have been assigned as a recipient or are the creator of an alert.

Due Dates — the choices are **Currently Due** (Alert Dates from today's date to seven days in the past), **Over-Due** (any Alert Dates older than seven days), and **All Due Dates**.

Completion — choices are **Incomplete Only** and **Include Completed**. Selecting **Incomplete Only** will exclude any Completed Alerts from the output.

Client Status — choices are **All Clients** and **Selected Status**. If **Selected Status** is chosen, one or more Status states must be selected in the drop-down checklist.

Report Destination — choices are **Screen** and **Printer**.

Once all of the options have been set as desired, click **OK** to display or print the report, or click **Cancel** to close the dialogue without generating a report.

≧**TIP**≦ Most reports can be exported to other formats such as Excel. See the tip beginning with “Most reports can have their output exported to several formats” on Page 143 for information on this functionality.

Agency Reports

The **Agency Reports** dialogue is used to print reports that pertain to the agency as a whole rather than one service. Due to this, the reports do not usually summarize consumption statistics except at the highest level.

The Agency Report dialogue is launched by selecting **Reports | Print | Agency Reports** from the main menu. The dialogue appears as follows:

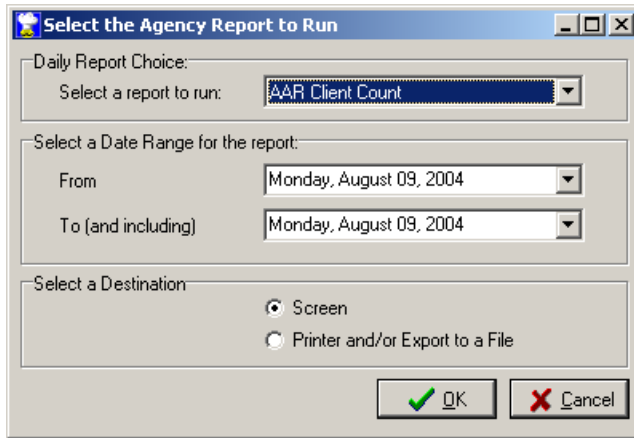


Illustration 158: Select the Agency Report dialogue

The **Select a report to run** drop-down lists the available counseling reports. In this example, the **AAR Client Count** is the selected report. The report choices are listed below.

The **From** and **To** dates select the range of dates for delivered services to be included in the report (both fields default to the current date). The **To** date must be equal to or later than the **From** date. You will notice that as you advance the **From** date into the future, if the **From** date exceeds the **To** date, the **To** date will automatically increment so that it is always at least equal to the **From** date.

The **Select a Destination** radio buttons determine how the report will be presented. You may preview the report on-screen (and subsequently print it, if desired) by selecting **Screen**, or you can send it directly to the printer without first previewing it by selecting **Printer**.

Once all of the options have been set as desired, click **OK** to display or print the report, or click **Cancel** to close the dialogue without generating a report.

The report choices on this screen are:

- **AAR Client Count**
- **Starting Client Demographics** – this report summarizes Client demographics based on the Meals Start date. Its data is generated by one of the queries in the Queries table, therefore the categories can be adjusted by modifying the supporting query, when necessary.
- **All Active Client Demographics** – this report summarizes Active Client demographics. Its data is generated by one of the queries in the Queries table, therefore the categories can be adjusted by modifying the supporting query, when necessary.
- **CareWare Summary** – this report summarizes consumption data for a CareWare report, and optionally prepares the summary for export to CareWare. This report will present a number of dialogues in which agency choices for Race, Services, and other tables are mapped to the equivalent choices in CareWare.

➤**TIP**➤ Most reports can be exported to other formats such as Excel. See the tip beginning with “Most reports can have their output exported to several formats” on Page 143 for information on this functionality.

Other Reports

This menu choice, found on the main menu at **Print | Reports | Other Reports**, hosts the following general reports (They are general in nature in that they are not Client-specific, nor are they time-based (i.e., they do not summarize consumption or demographics). Each report may display additional selection screens, specific to the respective report.

- **Clients Listing** – this report lists all Clients by name. It can be optionally limited to Clients with a specific Status.
- **Household Members** – this report lists all Households, and the Household Members of each.
- **Relationships** – this report lists all Individuals and their relationships with Clients.
- **Clients by Selected Diet** – this report will prompt for selected diet(s) and display the Clients affected

by those diets.

- **User-Defined Reports** – this report menu hosts up to five user-defined reports. See “User-Defined Reports Menu”, Page 22, for information on how to assign a report to this menu.

Query Builder

The Query Builder allows virtually unlimited querying of your MealService data. By visually adding tables, selecting fields, setting relationships, and setting filters you will be able to build sophisticated SQL (structured query language) queries. The data resulting from a query can be saved to a new table or exported to several external formats (such as comma-delimited). While it is relatively easy to build simple queries, sophisticated queries require a rudimentary knowledge of SQL queries. Since the query builder has many features in common with Microsoft Access, a good Access manual may help in grasping some of the more sophisticated concepts.

The Query Builder has extensive on-line help files. These instructions are merely intended to supplement the on-line help.

The query design interface appears as follows:

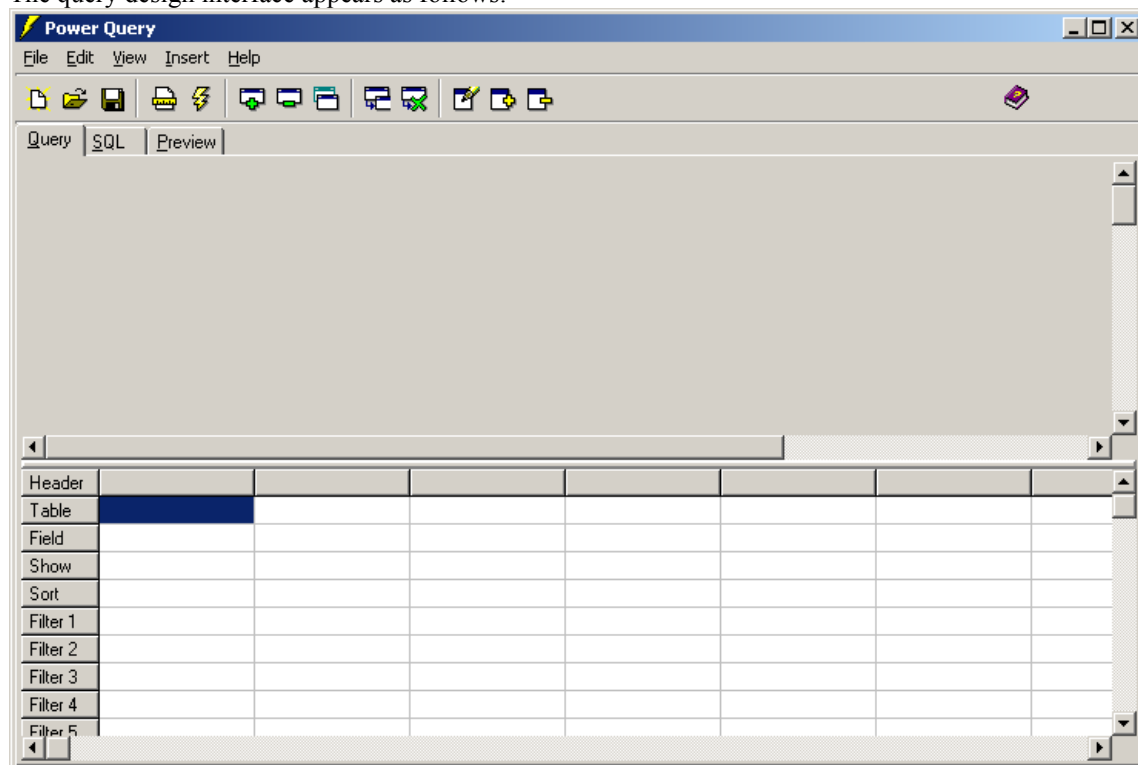


Illustration 159: Query Designer design interface

The first step in building a query is to add the needed tables to the design surface of the *Query* tab.

Add Tables

Press the tool bar button to display the **Add Tables** dialogue, or use the **Edit | Add Tables** menu. The following dialogue is displayed:

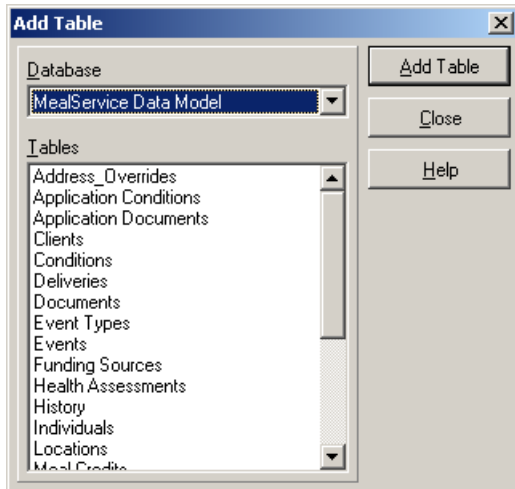


Illustration 160: Query Designer Add Table dialogue

The **Add Table** dialogue consists of the following elements:

Database

The drop-down box at the top lists the available databases. For MealService, normally the only choice displayed will be *MealService Data Model*.

Tables

You can use any of the following actions to add tables to a query:

- Double-click the table name
- Press **[Enter]** with a table name highlighted
- Click the **Add Table** button

Once all the tables of interest have been added, select the **Close** button and rearrange the tables in a visually meaningful order.

Join Tables

Once the tables have been added to the design surface then the joins between them need to be defined. Many of the joins for the MealService tables have been pre-defined. Any suggested joins can be edited or removed, however.

To join tables, drag-and-drop the related field from one table to another, as follows:

1. Point to and press the left mouse button over the left table's linking field.
2. Drag your mouse over the right table's linking field.
3. Release the left mouse button.

This dialogue will be displayed, asking for the join type:



Illustration 161: Query Designer Join Type dialogue

If the join requires more than one field (or tables in addition to the first two), repeat the process above for each table and field.

The **OK** button accepts the changes you have made to the Link Operator and Link Type, and closes the **Link Tables** dialogue.

The **Cancel** button closes the **Link Tables** dialogue without accepting any changes.

The **Delete** button removes the current link and closes the Link Tables dialogue.

Removing Table Joins

Removing table joins from a query is a two-step process:

1. Select the join to be deleted by placing your mouse pointer over the join and press the left mouse button.
2. Press the tool bar button to remove the table link, or use the **Edit | Remove Join** menu. A deletion confirmation dialogue will be displayed. Click the **Yes** button to remove the join.

Make certain that you replace a table join or remove any un-joined tables before executing your query. Otherwise, you may generate an error if a table has not been linked. You can also remove table joins by removing both of the associated tables from the query.

Once the tables and joins are in place the design surface should appear something like the following:

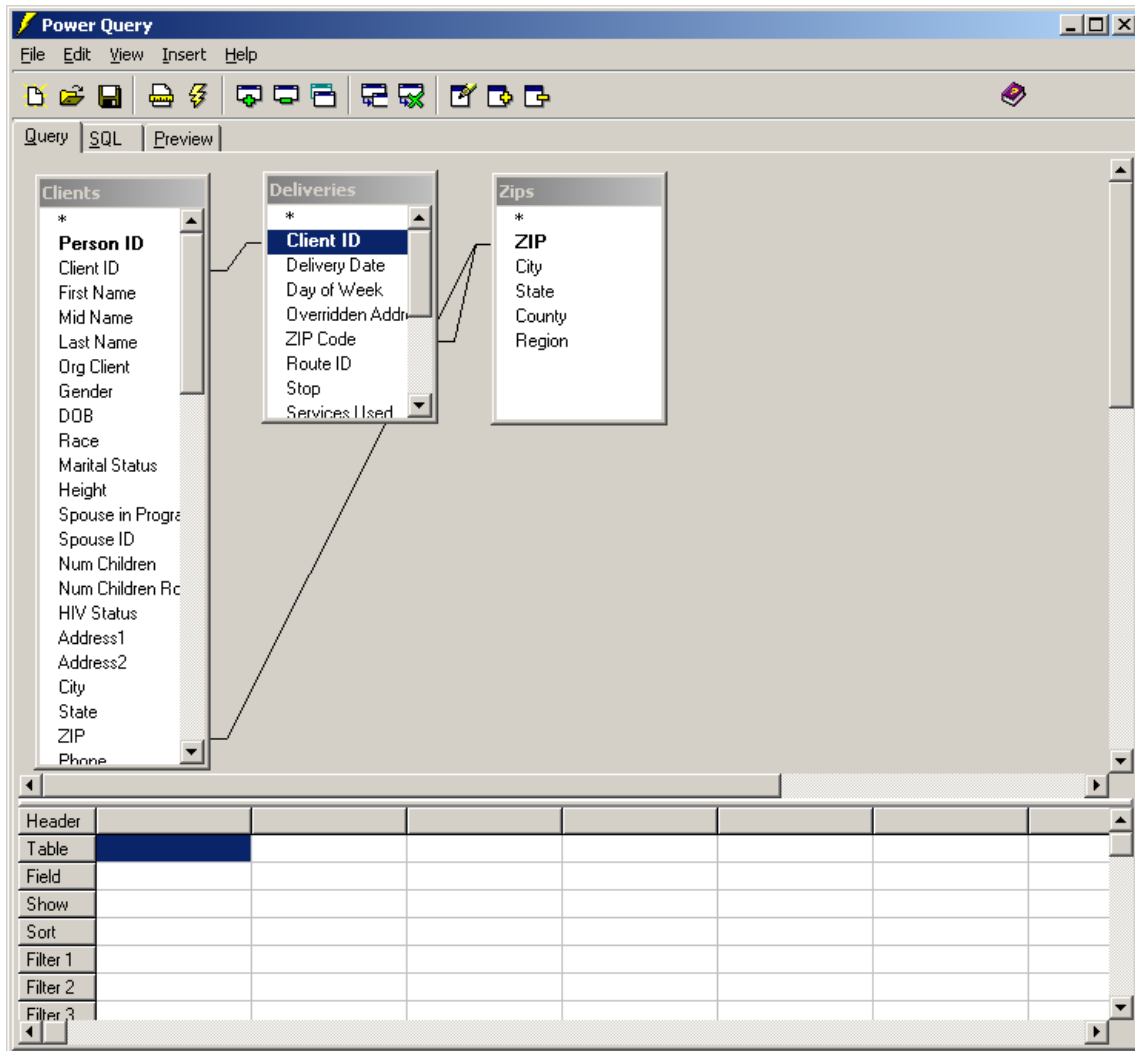


Illustration 162: Query Designer illustrating Table Joins

The next step is to identify which fields should be included in the query. The fields included in the query will be displayed in the query grid at the bottom of the screen.

Adding fields to a query can be done in one of two ways:

1. Double-click any of the field names listed under each of the tables displayed in the design surface
- Or use this simple three-step process:

1. Press the left mouse button over the selected field
2. Drag your mouse down to the query grid on the bottom of the screen.
3. Release the left mouse button.

Once you have released the left mouse button, the field will appear in the query grid. You may have as many fields as you need in your query, limited only by your hardware and memory.

To rearrange values, perform the following steps:

1. Point to the field header
2. Hold your left mouse button
3. Drag the field left or right
4. Drop the field by releasing the left mouse button

Once the query's fields have been selected, the properties for each must be set (if necessary). To modify a field's characteristics or properties, double-click directly on the field in the query grid, or select the **Edit** |

Edit Field menu. This displays the **Value Editor** dialogue:

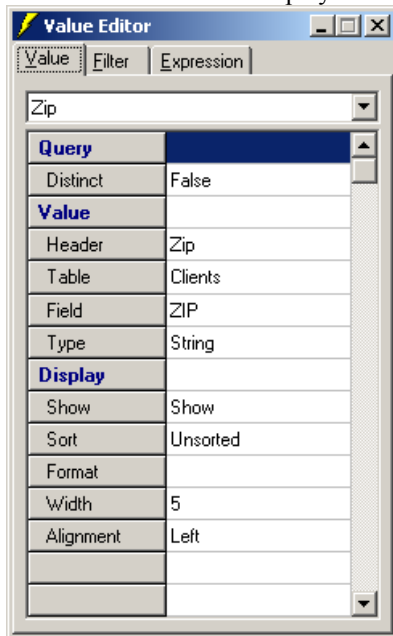


Illustration 163: Query Designer Value Editor dialogue

The **Value** tab consists of the following elements:

Header: The Header property is the description of the field that will appear in your results and cannot be blank. It defaults to the name of the field in the database. Some field names will be cryptic or unacceptable on a business report. The *Header* property allows you to customize the field-description.

Type: The Type property is the data type of the field. For example, the Delivery Date field can only accept valid Date values. The Filter values that you enter must be consistent with the data type.

Show: The *Show* property determines how a field will be displayed in your results. The two most common settings are

Show: is used to include the field in the results displayed on the **Preview** tab

Hide: is used to hide the field from **Preview**. Use the Hide setting so that you can search on fields but not include them in the results.

Other choices include entries such as **Group**, **Sum** and **Count**, which are beyond the scope of this introduction. A quick tip on using the aggregating functions of Sum and/or Count: If you use Sum or Count in a query, then ALL of the remaining fields in that query must be set to be Hidden or Grouped.

Sort: The Sort property determines if the field will be used to arrange the order in which the records are displayed on the report. When more than one column has been selected to sort on, the collective sort order is based on the left-to-right sequence of these columns in the "Define Search" grid. Sort property values are:

None for no sort

Ascending for "A-Z" or "1-9" sorting

Descending for "Z-A" or "9-1" sorting.

Format: The *Format* property determines the manner in which the field will be displayed. See the online help for additional information on this property.

Width: The *Width* property determines how long the field will appear in the returned data. If you want to completely hide the field, change the *Show* property to *Hide*.

Align: The *Align* property determines if the values in a field will display Left, Right or Centered within the width of the displayed field. Most date and numeric data types automatically align themselves to the right.

Navigating within the Value Editor Dialogue

Once you have displayed the Value Editor dialogue, you can navigate between values without leaving this dialogue. Simply click the next field of interest in the Query grid, or select a different field in the Value Editor Field drop-down list:

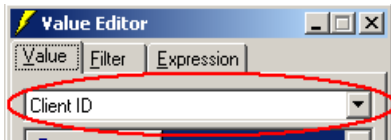


Illustration 164: Value Editor Field drop-down list

Changes to previously selected fields are automatically saved.

Once the display properties have been set for each field, filters can be applied to limit the returned data. Filters are entered on the **Filter** tab of the **Value Editor** dialogue. Creating filters is beyond the scope of this introduction. Refer to the Query Builder online help for instructions on creating filters.

When the query is completed, the query results can be viewed by selecting the **Preview** tab or by selecting **View | Preview** from the menu.

The **SQL** tab allows viewing (and, optionally, editing) the generated SQL statement. Note, however, that any edits made to the SQL statement itself will not be reflected in the visual design on the **Query** tab. Nor will any edits made to the SQL statement be saved when, and if, the query is saved.

You can save the query, to facilitate running the same query again in the future. To do so, select **File | Save** from the menu.

The displayed results can be saved to a new table or exported to one of two delimited formats (comma-delimited or tab-delimited) by selecting **File | Export** from the menu.

The Query Builder is a product of ShazamWare Data Systems, Inc. and is distributed under license.

Intelligent Browse

The Intelligent Browse is a powerful tool for performing easy cross-tabs and summarization of demographic and other client statistics.

There are five **Intelligent Browsers** available: **Meal Delivery**, **Counseling**, **All Services**, **All Clients**, and **Health Assessments**. The *Meal Delivery* and *Counseling* browses present service unit statistics on the respective services during the selected period. The *All Services* browse does not display any service units consumed, therefore it can include demographic information on distinct clients for *all* services consumed (Delivery as well as Counseling) in the selected time period. The *All Clients* browse is literally that: all Clients regardless of status and with no consumption statistics included. Finally, the *Health Assessments* browse displays Health/Nutrition Assessments for the selected period.

The Intelligent Browse dialogue asks for a range of dates for which the data should be included in the analysis, and appears as follows:

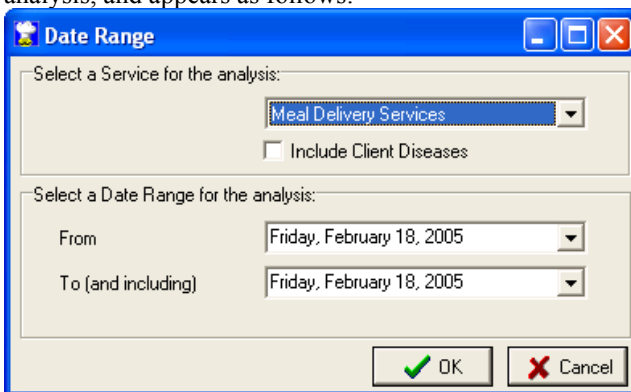
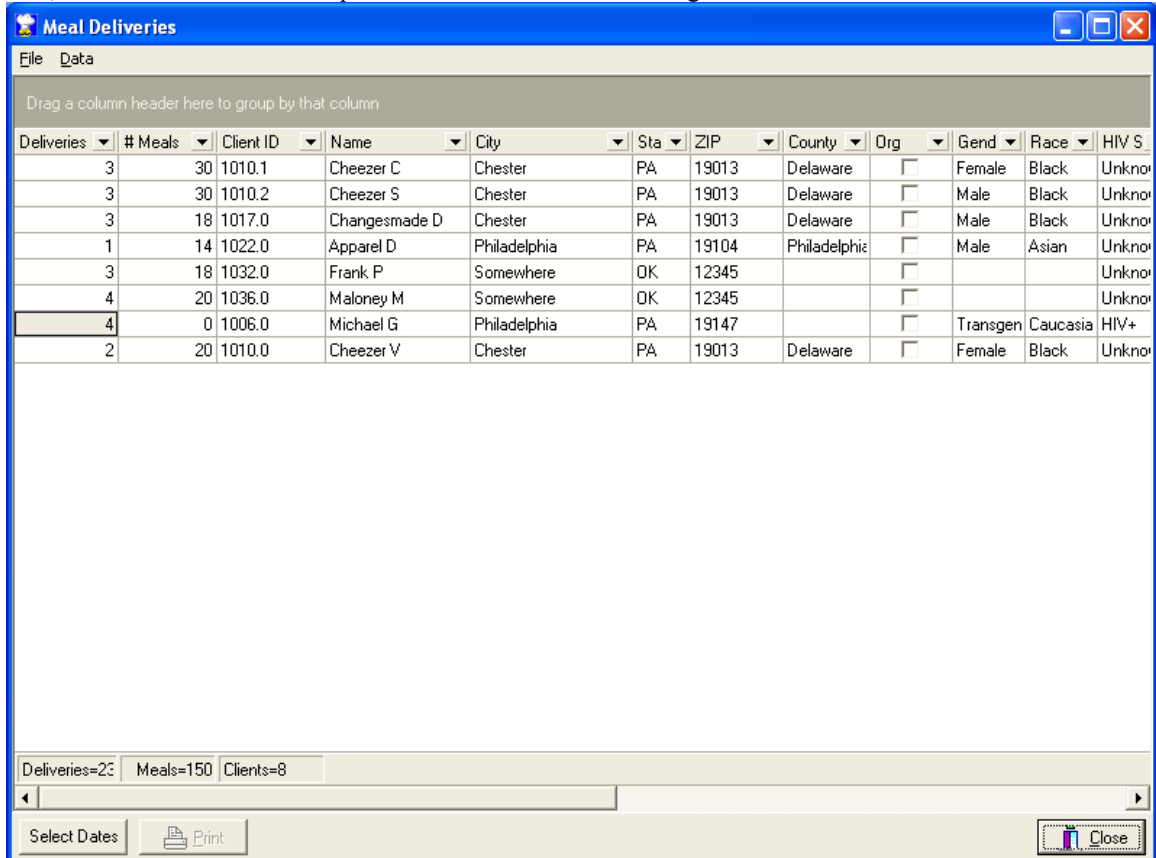


Illustration 165: Intelligent Browse Date Range dialogue

For selected browses, in addition to selecting the Browse to be displayed, you are given the option of whether to include Client Diseases. Adding Client Diseases to the browse may significantly slow the behavior of the browse, but it gives you the ability to filter the displayed clients to only those who suffer from selected diseases.

NOTE: The range of dates is only required when service units are included in the results. Therefore the date selectors are not visible when the All Clients browse is selected.

Once the service, and dates (when required), have been chosen, click **OK**. After a brief period to collate the data, a browse window will be presented similar to the following.



Deliveries	# Meals	Client ID	Name	City	Sta	ZIP	County	Org	Gend	Race	HIV S
3	30	1010.1	Cheezer C	Chester	PA	19013	Delaware	<input type="checkbox"/>	Female	Black	Unkn
3	30	1010.2	Cheezer S	Chester	PA	19013	Delaware	<input type="checkbox"/>	Male	Black	Unkn
3	18	1017.0	Changesmade D	Chester	PA	19013	Delaware	<input type="checkbox"/>	Male	Black	Unkn
1	14	1022.0	Apparel D	Philadelphia	PA	19104	Philadelphie	<input type="checkbox"/>	Male	Asian	Unkn
3	18	1032.0	Frank P	Somewhere	OK	12345		<input type="checkbox"/>			Unkn
4	20	1036.0	Maloney M	Somewhere	OK	12345		<input type="checkbox"/>			Unkn
4	0	1006.0	Michael G	Philadelphia	PA	19147		<input type="checkbox"/>	Transgen	Caucasia	HIV+
2	20	1010.0	Cheezer V	Chester	PA	19013	Delaware	<input type="checkbox"/>	Female	Black	Unkn

Deliveries=25 Meals=150 Clients=8

Select Dates Print Close

Illustration 166: Intelligent Browse screen

If Client Diseases were included, the display will appear as follows:

Meal Deliveries

File Data

Disease List for Filtering Clients

AIDS

Aspergillosis

Bacterial Infection(s), Multiple or Recurrent

Cancer-Cervical

Drag a column header here to group by that column

Deliveries	# Meals	Client ID	Name	City	Sta	ZIP	County	Org	Gender	Race	HN
+	3	30 1010.1	Cheezer C	Chester	PA	19013	Delaware	<input type="checkbox"/>	Female	Black	Unl
+	3	30 1010.2	Cheezer S	Chester	PA	19013	Delaware	<input type="checkbox"/>	Male	Black	Unl
	3	18 1017.0	Changesmade D	Chester	PA	19013	Delaware	<input type="checkbox"/>	Male	Black	Unl
	1	14 1022.0	Apparel D	Philadelphia	PA	19104	Philadelphia	<input type="checkbox"/>	Male	Asian	Unl
	3	18 1032.0	Frank P	Somewhere	OK	12345		<input type="checkbox"/>			Unl
	4	20 1036.0	Maloney M	Somewhere	OK	12345		<input type="checkbox"/>			Unl
	4	0 1006.0	Michael G	Philadelphia	PA	19147		<input type="checkbox"/>	Transgen	Caucasia	HIV
+	2	20 1010.0	Cheezer V	Chester	PA	19013	Delaware	<input type="checkbox"/>	Female	Black	Unl

Deliveries=23 Meals=150 Clients=8

Select Dates Print Close

Illustration 167: Intelligent Browse, with Client Diseases

The listing at the top includes all of the diseases to which the Clients in the browse suffer. There is a '+' button at the left of each line for every client who suffers any diseases, as illustrated above. Clicking that button will expand the list of that Client's diseases, and change the button's display to '-'. Clicking the '-' button will close the list of diseases.

Any column heading can be clicked-and-dragged into the space labeled *Drag a column header here*. Doing so will summarize the data by that column. For example, dragging the Race column into the top space will result in the following:

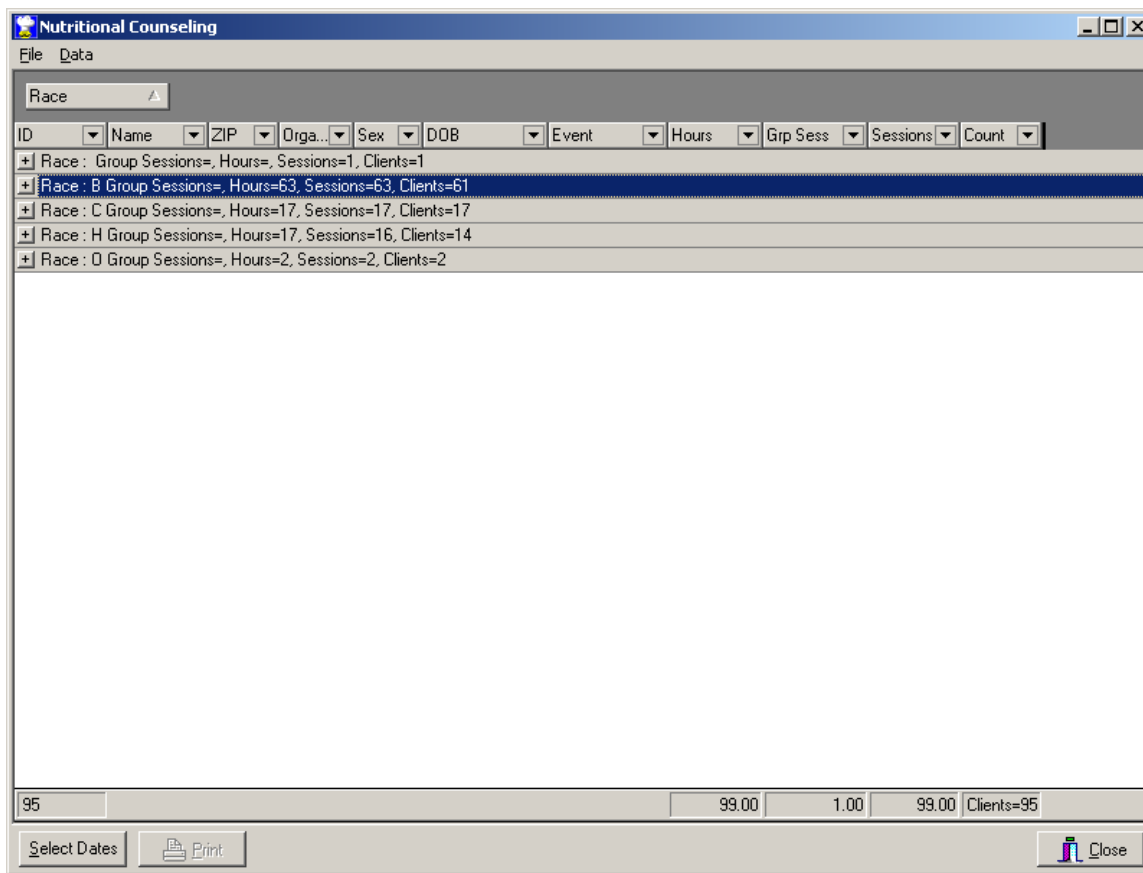


Illustration 168: Intelligent Browse screen, illustrating a grouped column

This summarizes the consumption statistics by race. The '+' button to the left of each of Race code can be clicked to expand the detail listings for that code.

Multiple column headings can be dragged into the *Drag a column header here* space. For example, if the Race data needed to be further categorized by ZIP code, the ZIP column header could be dragged into the top space.

Each column header also has a drop-down dialogue attached to it. The drop-down dialogue is accessed by clicking on the ▼ button to the right of the column name. Clicking on the Race drop-down, for example, will generate the following dialogue:

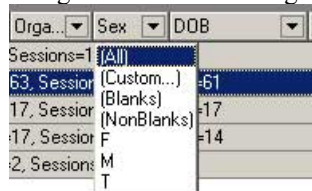


Illustration 169: Intelligent Browse filter drop-down list

Using this dialogue the data included in the browse can be filtered. For example, only data pertaining to Males could be chosen. Sophisticated filters can be created by selecting **(Custom...)** from the drop-down list. Doing so will display the following **Custom AutoFilter** dialogue:

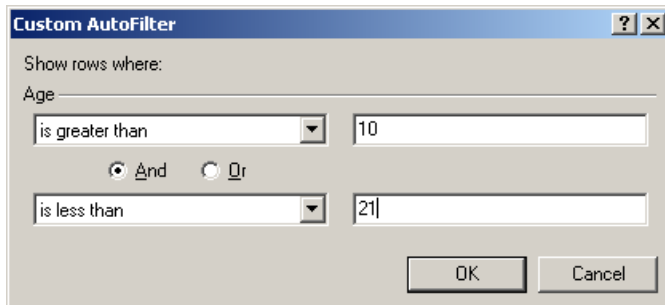


Illustration 170: Intelligent Browse Custom AutoFilter dialogue

In this example, results are being filtered to Clients aged older than 10 and less than 21.

If there is an active filter, the upper-left area of the screen will list the active filters, as illustrated:

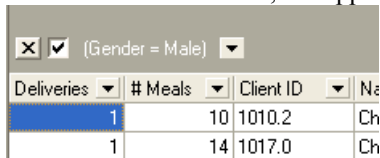


Illustration 171: Intelligent Browse, displaying the current filter conditions

Clicking the first 'x' will permanently remove the respective filter. Clicking the second 'x' will temporarily inactivate the filter.

If the list of Client Diseases was included in the browse, the list of diseases at the top of the screen is labeled **Disease List for Filtering Clients**. Filtering that list of diseases will limit the clients displayed to those who suffer from the selected disease(s). Removing the diseases filter will restore the display of clients to all clients.

To regenerate the Intelligent Browse with different parameters, select **Data | Select Dates** from the menu, or click the **Select Dates** button to re-display the Intelligent Browse selection dialogue.

The **Print** button is disabled, as that feature is not available currently.

➤**TIP**➤ Try exporting the results to Excel when printing is required. To do so, from the menu select **Data | Export | Export to Excel**.

Report Designer

MealService includes a sophisticated end-user reporting solution named *ReportBuilder*.

Brief instructions are included here on the ReportBuilder interface. For complete information, users are referred to the separate 125-page manual *Learning ReportBuilder*, which contains step-by-step instructions on creating and modifying ReportBuilder reports. This Adobe PDF document is contained on the MealService installation CD.

Selecting **Reports | Analyze | Report Designer** from the main menu launches the **Report Explorer**. The **Report Explorer** dialogue will be displayed, as follows:

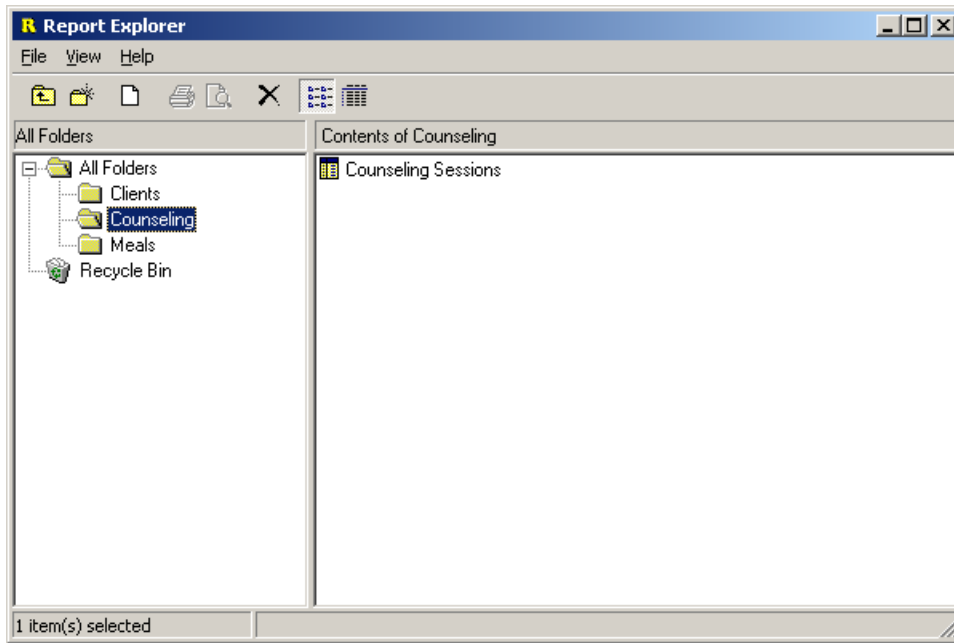


Illustration 172: Report Explorer dialogue

The Report Explorer is used to store and organize reports created by end users. The Explorer uses a standard Windows Explorer metaphor: nested folders. Reports can be created, stored, moved, and renamed using this dialogue.

Selecting **File | New | Report** from the Report Explorer menu will display the Report Designer. Double-clicking on an existing report name in the Report Explorer will also launch the Report Designer, with the selected report opened in design mode, as illustrated here:

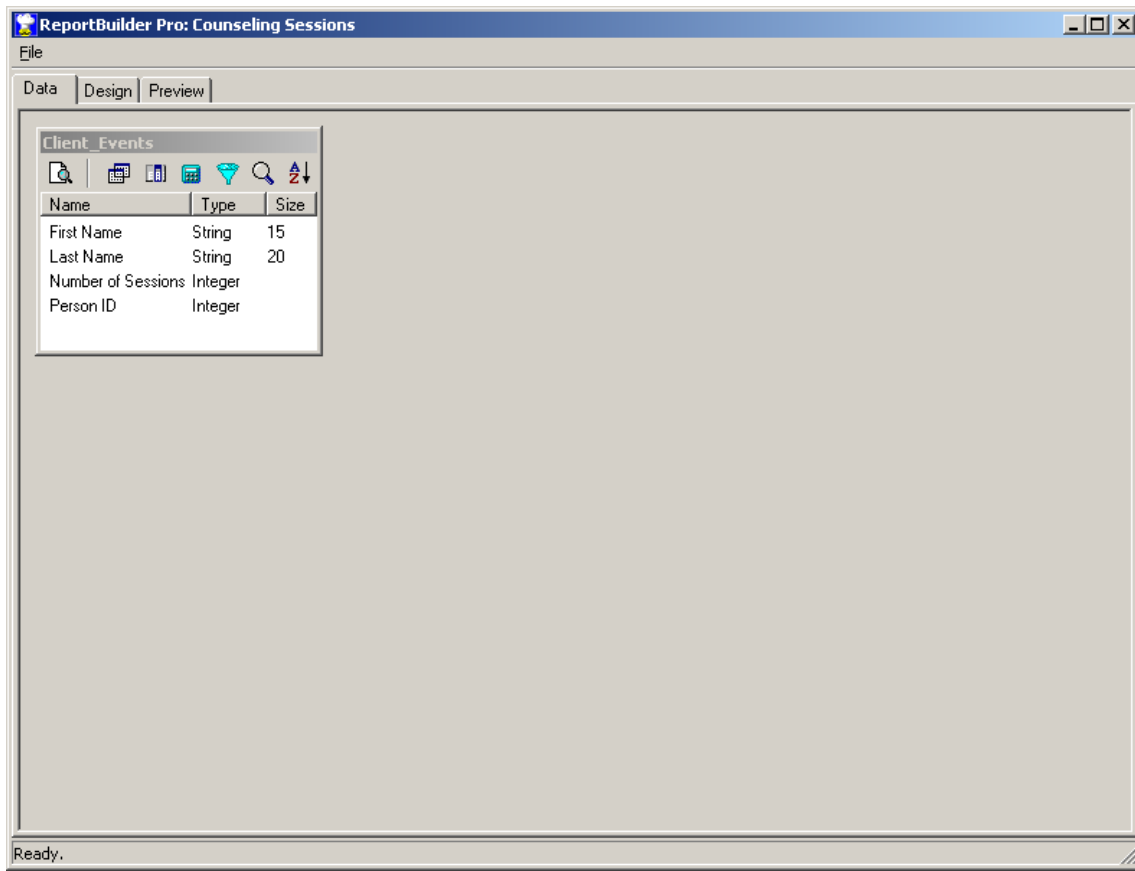


Illustration 173: Report Designer, report data tab

The Report Designer uses a tabbed interface. The illustration above displays the **Data** tab, on which the report's query is designed. Once the query has been completed, the report is visually designed on the **Design** tab, which is illustrated below:

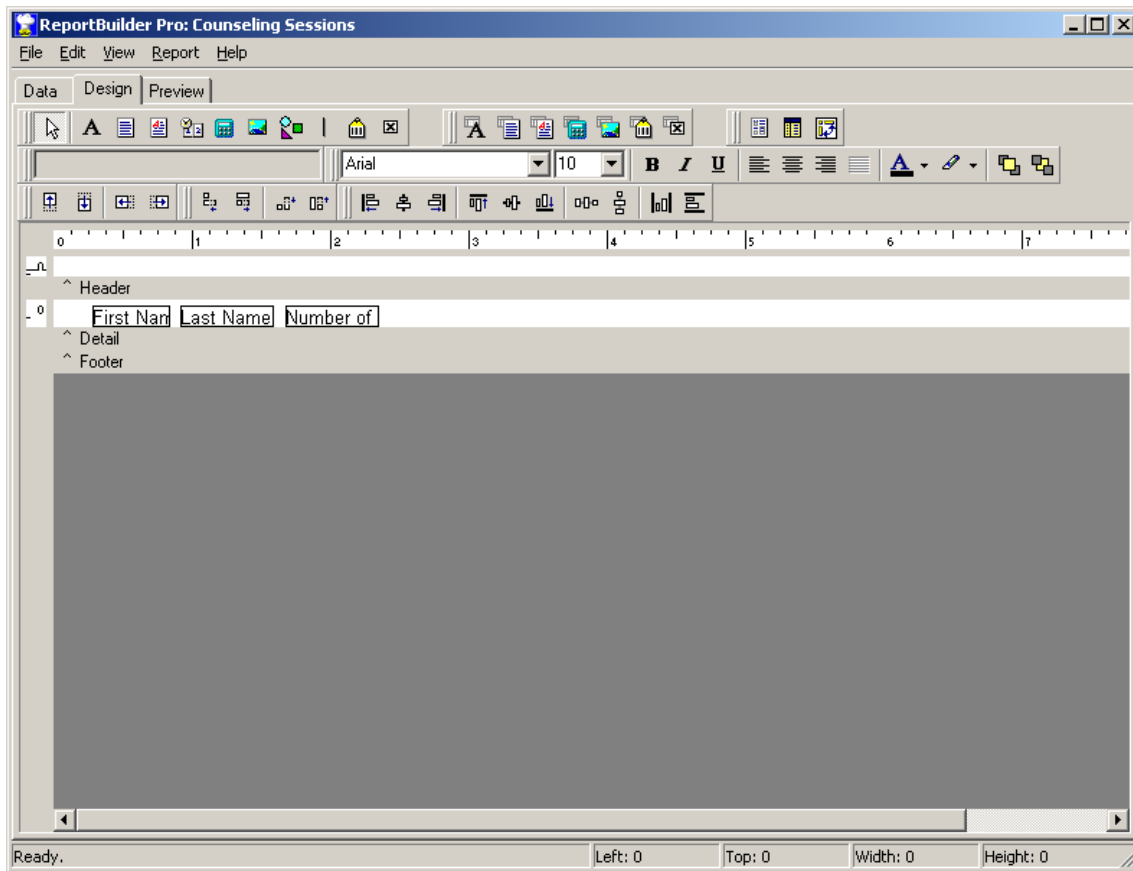


Illustration 174: Report Designer, report design tab

Fields from the report's query can be added to the design surface, report elements can be deleted or rearranged, and grouping and page behavior can be assigned.

The third tab, labeled **Preview**, can be selected to preview the report with live data.

Note: ReportBuilder is a software product of Digital Metaphors Corporation and is distributed under license. A printed version of the *Learning ReportBuilder* manual is available directly from Digital Metaphors (<http://www.digital-metaphors.com>). Several files of technical tips are also available online.

Charts

MealService makes one chart available in the current release. The chart summarizes the number of meals delivered by service, by day. Additional charts will be made available in future versions.

To access the Charts dialogue, select **Reports | Analyze | Charts | View and Print Charts**. The dialogue will be displayed, as follows:

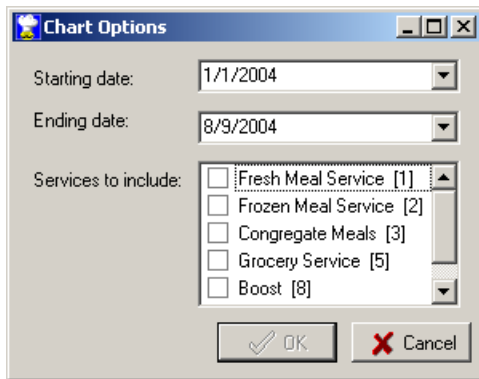


Chart Options

Starting date: 1/1/2004

Ending date: 8/9/2004

Services to include:

- ☐ Fresh Meal Service [1]
- ☐ Frozen Meal Service [2]
- ☐ Congregate Meals [3]
- ☐ Grocery Service [5]
- ☐ Boost [8]

OK Cancel

Illustration 175: Chart Options dialogue

The selections on this screen, include:

Starting date: Enter the starting date for the period, or click the ▼ button to display a calendar on which to select a date.

Ending date: Enter the ending date for the period, or click the ▼ button to display a calendar on which to select a date.

Services to include: Click the boxes for those Services that should be included in the chart. One or more Services must be checked before the **OK** button will become enabled.

Once the options have been set as desired, click **OK** to display the chart, or click **Cancel** to close the dialogue without generating a chart.

Clicking **OK** will display the following chart:

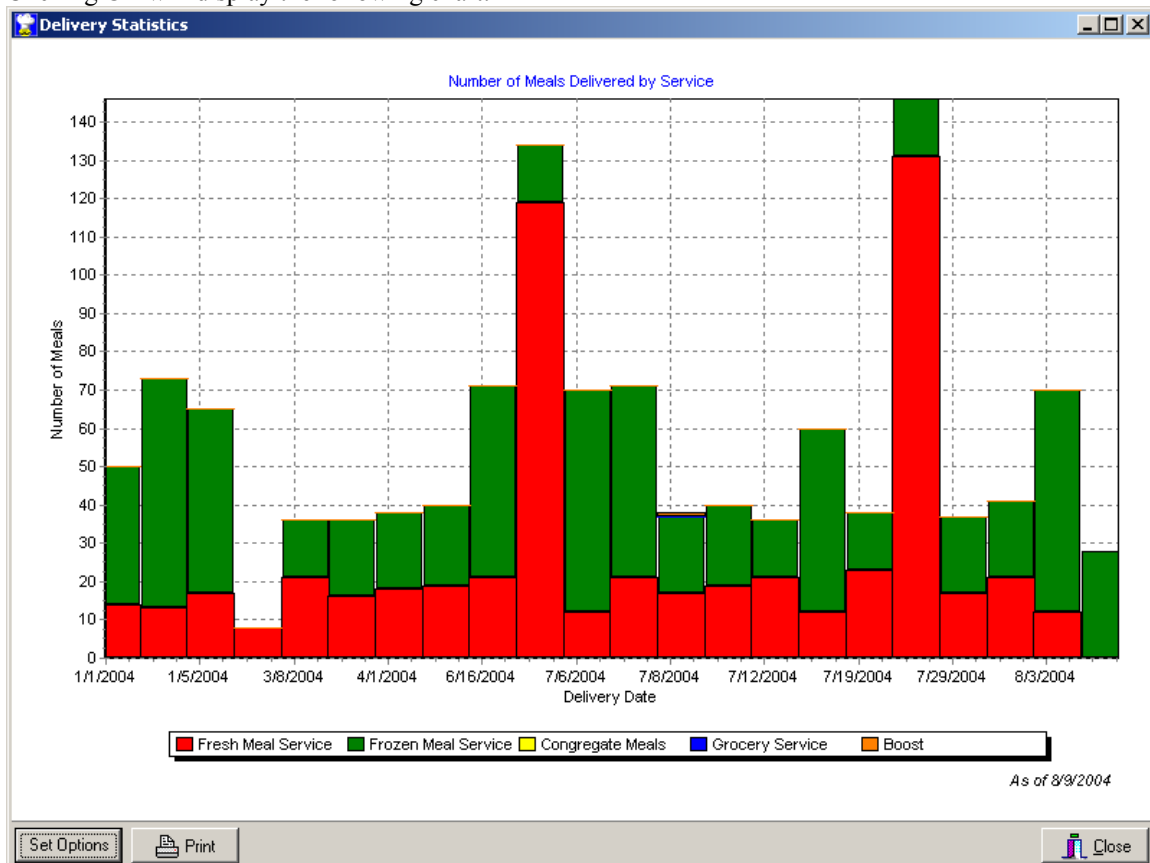


Illustration 176: Chart - Number of Meals Delivered by Service

The chart window includes the following buttons along the bottom border. Their descriptions and behaviors are:

Set Options can be clicked to redisplay the dialogue in which to select the dates and Services

Print: can be clicked to display a standard Windows Select Printer dialogue. Responding affirmatively to the Printer dialogue will send the chart to the selected printer.

Close: Click this button to close the window.

Chapter 7: Utilities

These are supporting utilities that, for the most part, are located on the **Utilities** menu. You will notice that various supporting functions are located throughout MealService, however.

Verify Delivery Conditions

See “How to Determine if a Client will receive a delivery for a selected date”, Page 127, for information on the Verify Delivery Conditions dialogue.

Record Missed Deliveries

This utility can be used to record a batch of missed deliveries. The utility is launched by selecting **Utilities | Record Missed Deliveries** from the main menu. When launched, the following screen is displayed:

The screenshot shows the 'Record Missed Deliveries' window. At the top, there's a title bar with the window name and standard OS controls. Below the title bar, there's a 'Delivery Date' section with a date picker set to '1/13/2005' and a day selector set to 'Thursday'. Below this is a section titled 'Clients who missed their delivery' containing a table with columns: Client ID, First, Mid, Last, Excused, Address, and City. The table has one row with a right-pointing arrow in the first column and a checkbox in the 'Excused' column. Below the table is a section titled 'Add and Remove Missed-Delivery List Members'. It contains a checkbox for 'Client selection is via scanner', a 'Search' dropdown set to 'Client ID' with a text input field, a 'Client' text field containing 'Timothy Harrison', and an 'Excused' checkbox. At the bottom of this section are 'Add to List' and 'Remove' buttons. At the very bottom of the window are two buttons: 'Record Missed Deliveries' and 'Close'.

Client ID	First	Mid	Last	Excused	Address	City
▶				<input type="checkbox"/>		

Illustration 177: Record Missed Deliveries utility

To use the utility, at the **Delivery Date** prompt enter (or select from the drop-down calendar) the appropriate delivery date. There is a grid labeled **Clients who missed their delivery** in the center of the window. That grid is primarily for display and navigation purposes, however the checkbox in the **Excused** column can be clicked to toggle the excused condition on and off. Clients are added to, and removed from, the list by using the controls at the bottom of the screen. Those controls are as follows:

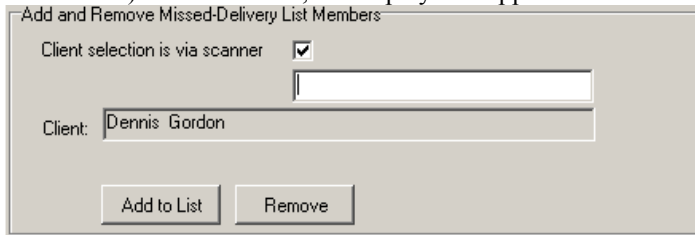
- **Client selection is via scanner** checkbox – If clients will be selected by scanning barcodes on a delivery report, then click this checkbox. Otherwise, if you will be selecting clients by looking them up using the keyboard, leave this checkbox unchecked. See “Using a scanner to select the clients” later in this section for specific instructions on using a scanner for client selection.
- **Search** dropdown list – This choice lets you select what field to search. The available choices are
 - **Person ID**

- **Client ID**
- **Phone**
- **Social Security Number**
- **Search for** entry field – Type into this box the value for which you want to search. For example, if the Search drop-down list is set to Phone, then type the telephone number for which you are searching. As you type, the first matching client name will be displayed in the **Client** box immediately below the entry field.
- **Excused** checkbox – If this missed delivery is to be recorded as *Excused*, then click this checkbox so that a checkmark appears. When this box is checked, the missed delivery will be marked as *Excused*. Once the correct client has been located and the Excused checkbox is set appropriately, click the **Add to List** button. Doing so will add the selected client to the list of clients in the grid. Repeat the look-up process to add another client who missed their delivery. Once that client has been located, click the Add to List button. Repeat the process as many times as necessary to add all of the clients to the list who missed their delivery.

If a client was added to the list by mistake, click on the name in the grid to select it, then click the **Remove** button.

Using a scanner to select the clients and record the deliveries

A barcode scanner can be used to record the missed deliveries, if your organization has chosen to print barcodes on the delivery reports. If you wish to use this option, make certain that the **Client selection is via scanner** checkbox has a checkmark in it. (You click the checkbox to alternately place or clear the checkmark.) When checked, the display will appear as follows.



The screenshot shows a dialog box titled "Add and Remove Missed-Delivery List Members". It contains a checkbox labeled "Client selection is via scanner" which is checked. Below this checkbox is a text input field that contains the name "Dennis Gordon". At the bottom of the dialog box are two buttons: "Add to List" and "Remove".

Illustration 178: Display when client selection is via a scanner

To add a client to the list of those who missed the delivery, simply scan the barcode belonging to the appropriate client on the delivery report. Upon scanning the barcode the client name will be added to the list. If a barcode was accidentally scanned and an incorrect name was added to the list, select the appropriate name in the list by clicking on it, then click the **Remove** button. The selected name will be removed from the list. Any missed deliveries which should be marked as Excused can be so marked by clicking the appropriate **Excused** checkbox in the grid, so that a checkmark appears in it.

Finalizing the list and recording the deliveries – for both keyboard and scanner entry

Once the list of clients is complete and accurate, click the **Record Missed Deliveries** button. The utility will cycle through the list and create a missed delivery, for the selected delivery date, for each client on the list. While the list is being processed, for each client on the list who did not actually receive a delivery on the day in question, the following dialogue will be displayed:

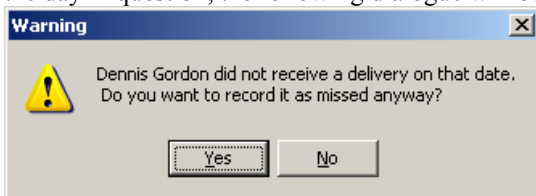


Illustration 179: Non-delivery warning dialogue

Clicking the Yes button will record the delivery as missed anyway, clicking No will cause that client to be skipped in the list and no missed delivery will be recorded for them.

Once the process is completed, the list will be cleared so that you can process another delivery date, if desired.

Note: The alternative to recording missed deliveries as a batch is to look up each client who missed their delivery and use the **Record Missed Deliveries** button, found on the Status/Dates tab. See “Record Missed Delivery”, on page 54, for information on that functionality.

Order Stops by Route

This utility, accessed from the main menu by selecting **Utilities | Order Stops by Route**, facilitates the assignment of stops to the clients on a selected route, by specific day of the week. It can also be used to manage the Clients assigned to routes by moving batches of Clients from one route to another.

Routing		Client ID	Name		Stat	Address	City	Household ID	Cross Street
Route	Stop		First	Last					
CC		1007.1	Truman	Eyler	A	32 Elgin St	Somewhere		
CC		1036.0	Meg	Maloney	A	97 Navajo St	Somewhere		
CC		1037.0	Jim	Ferro	A	311 Main St	Webster		
CC	0	1030.0	Pam	Frank	A	748 W Gravers Ln	Somewhere	7	
CC	0	1030.2	Paul	Frank	A	748 W Gravers Ln	Somewhere	7	
CC	0	1030.4	Patsy	Frank	A	111 Walker Ave	Somewhere	13	
CC	0	1030.5	Pat	Frank	A	111 Walker Ave	Somewhere	13	
CC	1	1029.0	Amanda	Hugg	A	700 W Gravers Ln	Philadelphia	12	

Illustration 180: Order Stops within Routes dialogue

To assign stops to a route, using the **Select a Route** drop-down list select the desired route, then using the unlabeled drop-down list adjacent to it (with the initial selection of **Default Route Only**) select the desired day of the week, and then click the **Retrieve** button. Using the unlabeled drop-down list you can select the Clients' default route or a route assigned for a specific day of the week (if a Client has had one assigned). If no day-specific Route has been assigned then the Default Route is used in its place). The **Active Clients Only** checkbox, when checked will restrict the addresses displayed to those of Active clients. If unchecked, all clients, regardless of status, will be displayed.

The grid displays the selected records, and you may then modify the clients' stops to order the route as you see fit. **NOTE:** No information in this grid is editable other than the **Route** and **Stop**. The grid can be sorted by clicking on most column labels. For example, clicking on the column heading labeled *City* will sort the grid by City. There are a number of tools available to facilitate the process of ordering the stops on a route, as described in the next few paragraphs.

Any changes made to the clients on a route are temporary, until they are applied permanently as a batch. If

any changes have been made, when you retrieve a new route or are about to close the *Order Stops* window you will be shown the following dialogue:

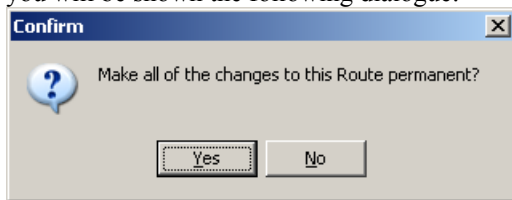


Illustration 181: Make Route changes permanent confirmation dialogue

Clicking **Yes** will apply all of the changes you have made. Clicking **No** will leave the Route as it had been prior to your starting work.

Multiple rows in the grid can be selected (using standard Windows multiple-selection methods: by control-clicking or shift-clicking). Once selected, an action can be taken that applies to all of the selected rows. For example, a Household could be moved to a new route, or the stop number of everyone on a route could be incremented by one. Right-clicking the grid will display the context menu, as illustrated below:

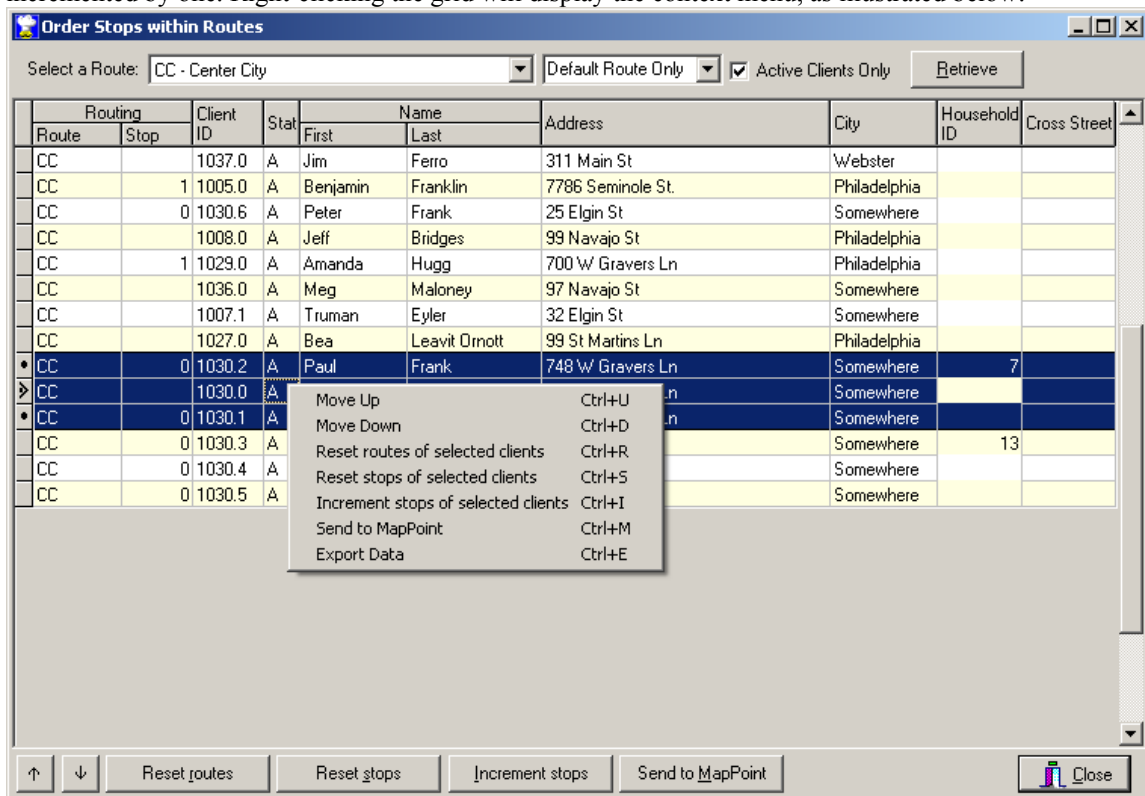


Illustration 182: Order Stops by Route Context Menu

The choices on the context menu are:

- **Move Up (Control+U)** — This choice will move the selected row higher in the grid, swapping Stop numbers with the row above it. This will only function if the currently selected row and the row above it have different Stop numbers.
- **Move Down (Control+D)** — This choice will move the selected row lower in the grid, swapping Stop numbers with the row below it. This will only function if the currently selected row and the row below it have different Stop numbers.
- **Reset routes of selected clients (Control+R)** — This choice will act upon all of the currently selected rows. (In Illustration 182, three rows have been selected.) Selecting this choice will display the following dialogue:

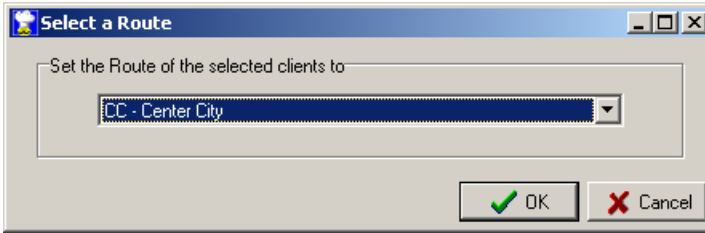


Illustration 183: Select a Route dialogue

This option will set each of the selected Client's routes to a new value. This feature may be useful when a route has grown too large, and it's needed to move a group of Clients to a new route. To do so, select a route from the **Select a Route** dialogue and click **OK**. The Clients will have their routes reset to the newly chosen one. (Keep in mind that, if a different route was chosen than is currently displayed on the grid, the Clients will disappear from view, since they are no longer on the displayed route). Clicking **Cancel** will close the dialogue without moving the Clients to a new route.

- **Reset stops of selected clients (Control+S)** — Selecting this choice will display the following dialogue:

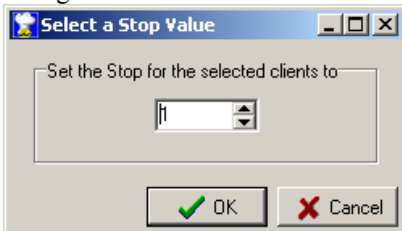


Illustration 184: Select a Stop Number

This option will set all of the selected Clients' stop numbers to the newly chosen value. Select (or enter) a new stop number and Click **OK**. The Clients' stop numbers will be updated and the dialogue will close. Click **Cancel** to close the dialogue without resetting any stop numbers.

- **Increment stops of selected clients (Control+I)** — Selecting this choice will display the following dialogue:

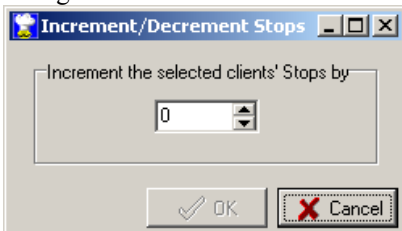


Illustration 185: Increment/Decrement Stops

This option will increment all of the selected Clients' stop numbers by the chosen value. Select (or enter) a value with which to increment (increase) or decrement (decrease) the stops and click **OK**. If a positive value is entered, each of the selected stop numbers will be incremented (increased) by that value (i.e., the value will be added to each of the current stop numbers). For example, if 2 is the value chosen, a Client whose stop number is one will have the stop set to three. A Client whose stop number is five will have the stop set to seven, and so on. If a negative value is entered, each of the selected stop numbers will be decremented (decreased) by that value (i.e., the value will be subtracted from each of the current stop numbers). For example, if -3 is the value chosen, a Client whose stop number was 10 will be set to seven.

- **Send to Mapping (Control+M)** — This choice will display the **Mapping Options** dialogue. See "Mapping with MapPoint and Streets & Trips/AutoRoute", Page 178, for instructions on this option.
- **Export Data (Control+E)** — This choice will export the currently selected records to a file. The following dialogue will be displayed:

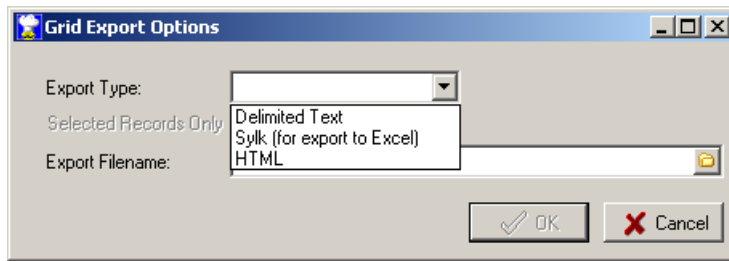


Illustration 186: Grid Export Options

Select the export type from the **Export Type** drop-down list. The available options are **Delimited Text**, **Sylok (for export to Excel)**, and **HTML**. The **Selected Records Only** checkbox is reserved for future use and is not currently functional. At the **Export File Name** prompt enter a file name (or click the button with the file folder icon (□) to display the **Save As** dialogue.) Once the options have been set as desired click **OK** to export the data, or click **Cancel** to close the dialogue without exporting the data.

There is a row of buttons across the bottom of the screen. The buttons offer much of the same functionality as is offered by the context menu. The buttons are as follows:

↑ — This offers the same functionality as **Move Up (Control+U)**, described above.

↓ — This offers the same functionality as **Move Down (Control+D)**, described above.

Reset routes — This offers the same functionality as **Reset routes of selected clients (Control+R)**, described above.

Reset stops — This offers the same functionality as **Reset stops of selected clients (Control+S)**, described above.

Increment stops — This offers the same functionality as **Increment stops of selected clients (Control+I)**, described above.

Send to Mapping — This offers the same functionality as **Send to Mapping (Control+M)**, described above.

Close — This closes the dialogue.

Update Stopped Status

This utility facilitates converting the status to Stopped of those Clients who are Active but who have had a Stop date entered. The utility is accessed via the **Utilities | Update Stopped Status** menu. Launching the utility will present the following screen:

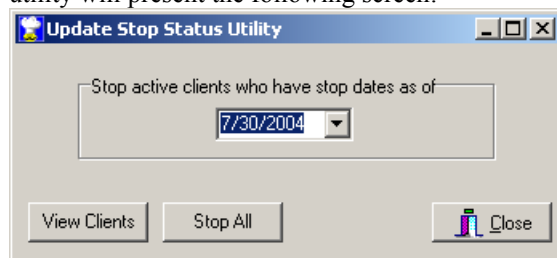


Illustration 187: Update Stop Status dialogue

Any active clients who have a Stop Date earlier than or equal to the date selected will be selected for updating. Once a date has been chosen, you may either click the **View Clients** button, if you wish to selectively Stop clients, or click the **Stop All** button which will stop all of the matching clients. Clicking **View Clients** will display a list similar to the following:

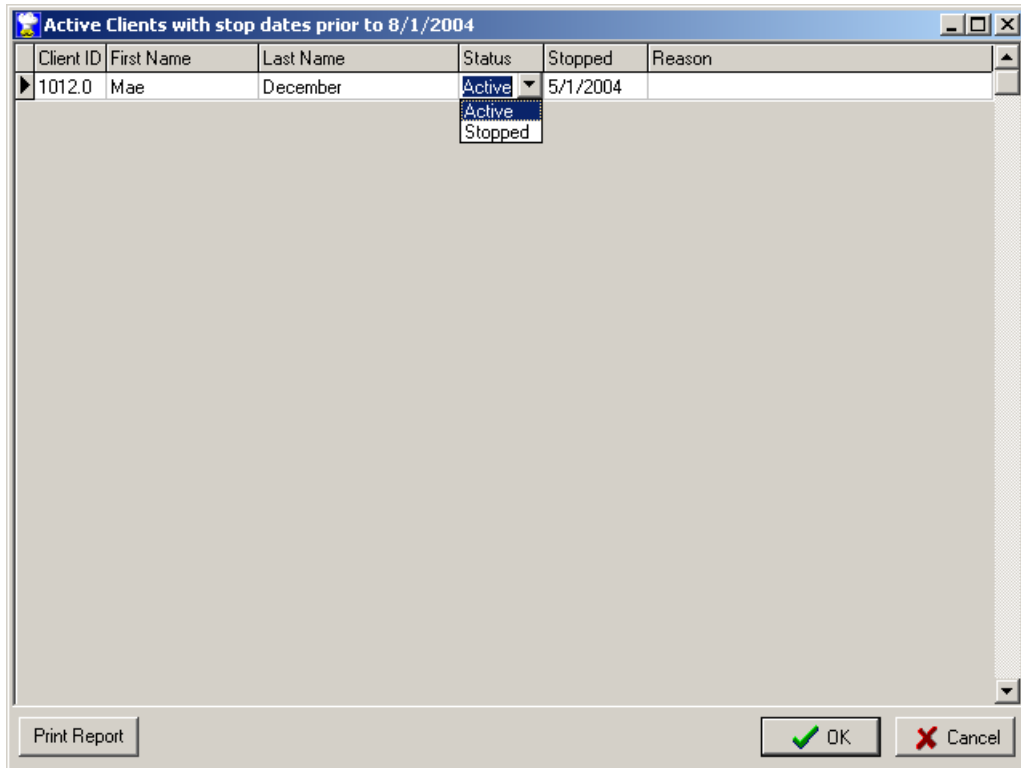


Illustration 188: Active Clients with Stop Dates prior to... dialogue

You may change the Status of any client by using the drop-down list available for each client in the Status column. Once all of the desired status changes have been made, click the **OK** button to apply the changes or click **Cancel** to close the dialogue without saving the changes.

Clicking on the **Stop All** button will proceed with moving *all* clients who meet the criteria from an Active status to Stopped status.

Inactivating Stopped Clients

This utility will facilitate converting clients' status from Stopped to Inactive. It selects Clients with a status of Stopped and who have had that status since the selected date. The utility is accessed via the **Utilities | Inactivate Stopped Clients** menu. Launching the utility will present this dialogue:

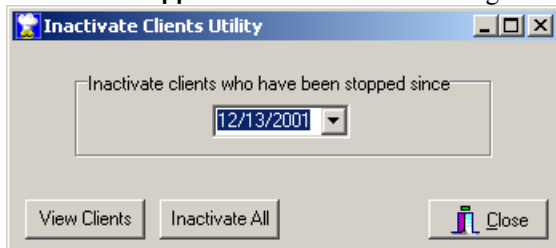


Illustration 189: Inactivate Clients dialogue

The **Inactivate clients who have been stopped since** date is initially set using the *Days Stopped to Become Inactive* value in the **Configuration** screen, on the **Client Services** tab. It can be overridden on this screen by simply entering, or selecting from the drop-down calendar, another date.

Clicking on the **View Clients** button will present for individual editing those clients who meet the criteria. A client's status can then be changed to Inactive on a case-by-case basis. Once all of the changes have been made, click the **OK** button to save the changes or the **Cancel** button to avoid saving any changes.

Clicking on the **Inactivate All** button will proceed with changing *all* clients who meet the criteria from a Stopped status to Inactive status.

See Also

Days Stopped to Become Inactive, Page 45

Deleting Deliveries

This utility is accessed through the **Utilities | Delete Deliveries** menu option. It will delete any deliveries that have been credited for a specified day and service. The situation where this might be needed would be if the daily processing had been done (which automatically credits all deliveries for all delivery services) and then, for some reason, one service isn't delivered. Another situation might arise where the deliveries had already been credited, but a storm prevented their actual delivery. In that case, the utility would have to be run for the selected day, as many times as needed to delete each of the services that might have been credited but not delivered.

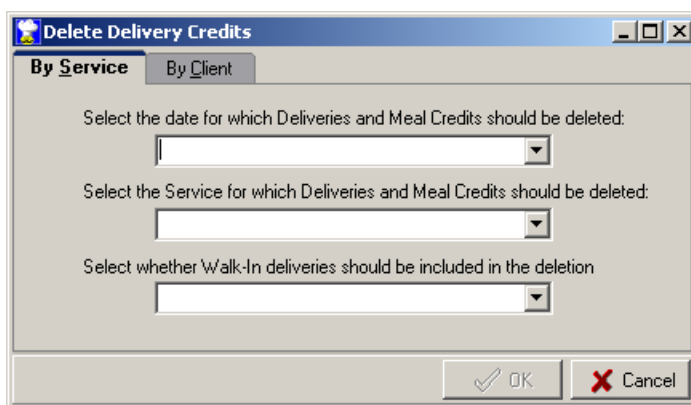


Illustration 190: Delete Delivery Credits dialogue, By Service tab

To delete the deliveries for a service, select the tab labeled **By Service**. Three selections are then required: **Select the date for which Deliveries and Meal Credits should be deleted** — enter a date, or select one from the drop-down calendar. This is the date for which the delivery credits will be deleted.

Select the Service for which Deliveries and Meal Credits should be deleted — select one of the delivery services from the drop-down list. Deliveries can only be deleted for one Service at a time. If all deliveries for a given date must be deleted, repeat the deletion process as many times as required, selecting a different service each time.

Select whether Walk-In deliveries should be included in the deletion — select one of the choices from the drop-down list. The choices are as follows:

- **Exclude Walk-Ins** from deletion — this choice will delete all deliveries except those where the delivery was a Walk-In
- **Delete all deliveries regardless** — this choice will delete all deliveries regardless of how they were conveyed
- **Walk-Ins only should be deleted** — this choice will delete only those deliveries that were walk-ins.

Once the appropriate choices have been made, click the **OK** button. If no deliveries match the specifications you will be so informed. If there are matches, the deletion will proceed automatically immediately after clicking the **OK** button. Click **Cancel** to close the dialogue.

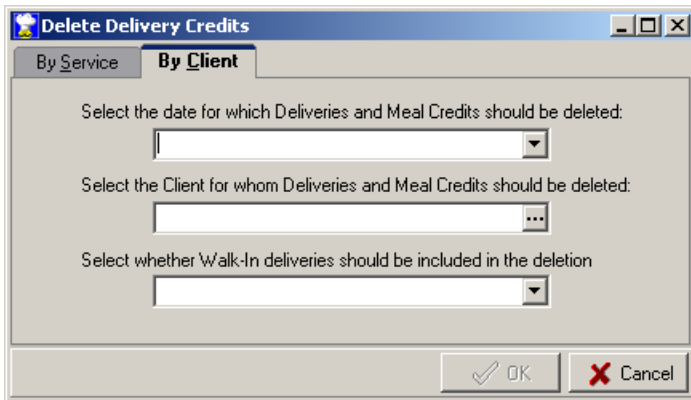


Illustration 191: Delete Delivery Credits dialogue, by Client tab

To delete a delivery for a particular Client, select the tab labeled **By Client**. Three selections are then required:

Select the date for which Deliveries and Meal Credits should be deleted — enter a date, or select one from the drop-down calendar. This is the date for which the delivery credits will be deleted.

Select the Client for whom Deliveries and Meal Credits should be deleted — Click the ellipsis button (...) to display a **Client Lookup** dialogue. In the Lookup dialogue, typing into the Search Characters edit field will select the Client with the Last Name most closely matching what has been typed. Once the desired Client has been located, double-click on the row containing the Client name or click the **OK** button to select the Client and close the dialogue. Click the **Cancel** button to close the dialogue without selecting a Client.

Select whether Walk-In deliveries should be included in the deletion — select one of the choices from the drop-down list. The choices are as follows:

- **Exclude Walk-Ins** from deletion — this choice will delete all deliveries except those where the delivery was a Walk-In
- **Delete all deliveries regardless** — this choice will delete all deliveries regardless of how they were conveyed
- **Walk-Ins only should be deleted** — this choice will delete only those deliveries that were walk-ins.

Once the appropriate choices have been made, click the **OK** button. If no deliveries match the specifications you will be so informed. If there are matches, the deletion will proceed automatically immediately after clicking the **OK** button. Click **Cancel** to close the dialogue.

Summarizing Missed Deliveries

The **Status/Dates** tab of the Client screen has two entries labeled **Total Missed, Non-Excused Deliveries** and **Total Excused Deliveries**. See the following illustration:

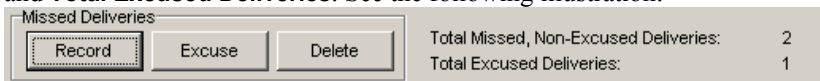


Illustration 192: Missed and Excused Delivery totals

The missed meal totals are calculated using the **Summarize Missed Deliveries** utility, which is accessed from the main menu by selecting **Utilities | Summarize Missed Deliveries**. Launching the utility will display the following screen:

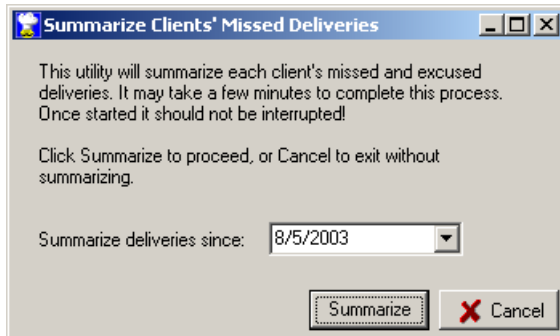


Illustration 193: Summarize Clients' Missed Deliveries dialogue

This utility is very simple. Select the date on which you would like the period to begin. For example, if you select July 1, 2004, any deliveries that have occurred on or after that date will be identified, and any of the identified deliveries that were missed and any that were excused will be tallied. Once a date has been selected, click the **Summarize** button to begin the process or click **Cancel** to close the dialogue without summarizing the missed deliveries. Upon completion, the *Missed* and *Excused Delivery* figures on screen will reflect the newly calculated totals.

Reset First Contact Date

The **Reset First Contact Date** utility can be used by those organizations that treat existing Clients as new Clients as of the start of a new fiscal year. MealService normally enters a First Contact Date only once, on the occasion of a Client's first delivery. The Reset First Contact utility allows removing the First Contact Date so that any reports that rely upon it will start with a clean slate at the beginning of a fiscal year. The utility removes all of the First Contact Dates, followed by entering the current date into those Clients who have a Status of Active.

The dialogue appears as follows:

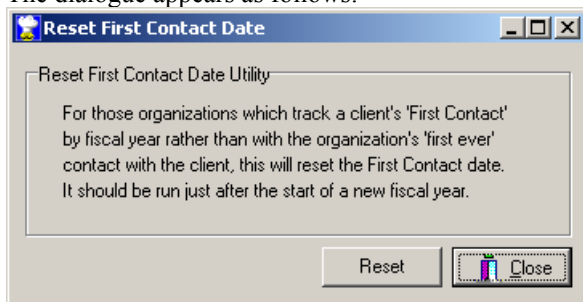


Illustration 194: Reset First Contact Date dialogue

Clicking **Reset** will set the utility in action. If it determines that there are Clients to be reset, the following confirmation dialogue will be displayed:

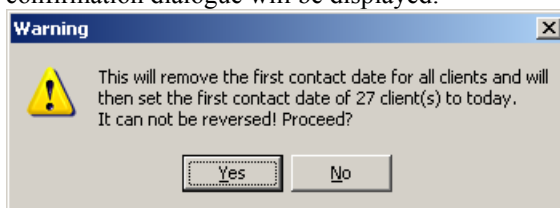


Illustration 195: Reset First Contact Date confirmation dialogue

Clicking **Yes** will reset the First Contact Date. Clicking **No** will avoid the resetting of the dates. Click the **Close** button to close the utility when finished with it.

Archiving Records

The **Archive Records** utility allows moving selected records out of four transactional tables and into tables that can then be stored in a location other than the active database. Selecting **Utilities | Archive Records** from the main menu launches the **Archive Records** utility. The utility screen appears as follows:

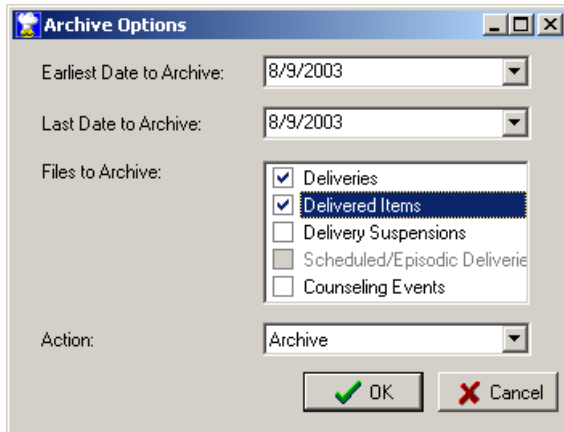


Illustration 196: Archive Options screen

This dialogue is used to select records for Archiving, as well as for Restoring records from an archive. The advantages of archiving records include:

- Reduced disk space demands
- Possible performance improvement due to there being fewer records in the database

The elements of the screen are as follows:

Earliest Date to Archive: Select the earliest date for which records are to be archived (or restored, depending upon the Action)

Last Date to Archive: Select the latest date for which records are to be archived (or restored).

Files to Archive: Select the desired tables upon which to act. A table is selected by clicking the box in front of the file name, so as to place a checkmark in the box. In the illustration above the *Deliveries* and *Delivered Items* tables have been selected. **NOTE:** Scheduled/Episodic Deliveries are disabled in the list because they cannot be archived in this version of MealService.

Action: select the action desired from the drop-down list. The choices are **Archive** and **Restore**. Selecting Archive will move the records from the permanent tables to the archive tables. Selecting Restore will perform the opposite action: it will move the records from the Archive tables back into the permanent tables.

Once the options have been set as desired, click **OK** to begin the archiving process or click **Cancel** to close the dialogue without performing the archiving operation.

NOTE: The archiving process can be quite time consuming. While not absolutely required, it is strongly suggested that all users exit MealService while the archiving operation is underway. Since most organizations need to run reports on operations up to two years in the past, it is suggested that archiving be performed for a period of three or more years in the past.

The archive process strips some data that, typically, is only required for current operations. Therefore, if data for a period has been archived and later restored, it will have slightly less information available. For example, whether a delivery had been sent to an Alternate Address will no longer be available.

The files into which the archive data is stored are named in the following list. These files can be stored on a ZIP disk or other alternative location and copied into, or out of, the permanent MealService data location as needed.

Archive Tables

Achived_Deliveries.dat

Archived_Deliveries.idx
Archived_Events.dat
Archived_Events.idx
Archived_MealCrdt.dat
Archived_MealCrdt.idx
Archived_Suspends.dat
Archived_Suspends.idx

Execute Query

The **Execute Query** dialogue can be used to execute periodic batch updates (such as a quality assurance routine which might update the Clients table for data consistency). Launch the dialogue by selecting **Utilities | Execute Query** from the main menu (or by using the speed-key combination of **Control+Q**).

The Execute Query dialogue appears as follows:

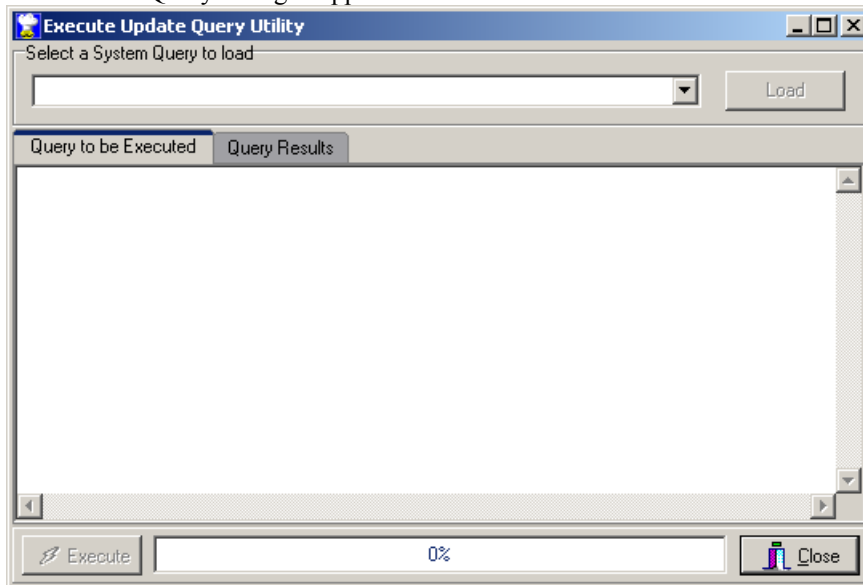


Illustration 197: Execute Update Query Utility dialogue

Any queries that are in the System Queries table and whose titles contain *Update*, *Delete*, or *Select* (regardless of case) will be available in the **Select a System Query to Load** drop-down list. For example, if there is a query that ensures data integrity and it is run once a month, it would be a simple procedure to store the query in the System Queries table, naming it “Update Monthly Integrity Check”. It could then be selected from the drop-down list when needed.

When an entry has been selected from the drop-down list the **Load** button will become enabled. Clicking **Load** will place the selected query’s update statement into the **Query Statement to be Executed** edit window. In addition to loading a previously stored query, an update or select query can be typed (or pasted) directly into the **Query Statement to be Executed** window.

Once the appropriate query statement appears in the **Query Statement to be Executed** edit window, clicking the **Execute** button will execute it. If the query is other than a simple select query and it could change your data you will be presented with a confirmation dialogue indicating that the query could make irreversible changes to your data. Click **Yes** to execute the query or click **No** to cancel out of executing the query. After confirming that the query should be executed, the execution will begin. Lengthy queries could take some time to complete. There is a progress bar on the bottom of the window to give visual feedback on the progress of the query. When the query finishes, you will receive an information dialogue indicating that the query successfully completed. If the query was a select query, the results will be displayed on the Query Results tab. Click **OK** to close the information dialogue, then click the **Close** button to close the **Execute**

Query dialogue.

Query statements in this dialogue can support one run-time parameter. A run-time parameter is a situation in which the user is asked to supply a value for the query to use. For example, the user might be asked to supply a delivery date on which to select records. In the SQL statement, a parameter is delineated with a colon. In the following query,

```
Select * from Deliveri where Deliv_Dt = :DeliveryDate
```

:DeliveryDate is the parameter that must be supplied when the query is executed.

When a parameter is present in a SQL statement, at the time the query is run the user will be presented with a dialogue asking for the parameter's value. For example, in the SQL statement in the preceding paragraph, the user will be presented with the following dialogue:

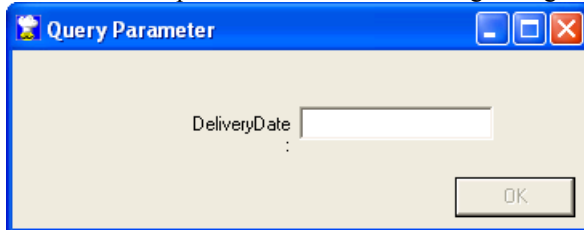


Illustration 198: Query Parameter dialogue

The prompt that is displayed is taken from the parameter itself. Therefore, to make an intuitive prompt, the parameter should be created with a more descriptive name. Spaces can be used in the parameter name, as long as the name is enclosed in double quotes. For example, the query

```
Select * from Deliveri where Deliv_Dt = : "Enter a Delivery Date"
```

would result in a dialogue as follows:

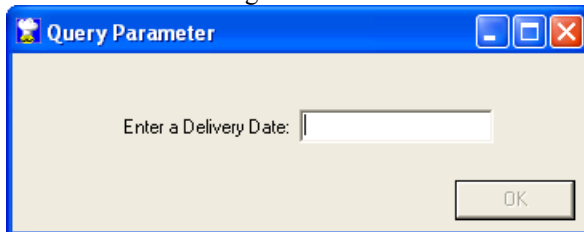


Illustration 199: Query Parameter dialogue illustrating an intuitive prompt

See Also

Maintaining System SQL Queries, page 38

Deleting/Rearranging Diet Codes

After time, an organization may find it necessary to delete an existing Diet Code. The organization might also decide that the Diet Codes should be in a different order than they are. MealService offers a utility to accommodate both situations.

Keep in mind, however, that both situations require careful restructuring of the data, so as not to lose any of the remaining diet information. The process can also be time consuming, so careful consideration should be given to the ultimate diet code organization prior to undertaking the reorganization.

The Delete/Rearrange Diet Codes module is accessed from the **Edit Diet Codes** dialogue. To launch the dialogue, select **Edit | Table Maintenance | Diet Modifications** from the main menu. In the **Edit Diet Codes** dialogue, click the **Delete/Rearrange** button. The following window will be displayed:

Modify Diet Codes Checklist

It is strongly suggested that all users exit MealService before using this utility!

The list on the left shows the current items, and is not editable.

The list on the right allows for deletion and reordering.

- To delete an item, click the small square. A checkmark will appear to indicate that it has been selected. Once all of the items to be deleted have been selected, click the 'Delete Checked' button.
- To reorder the list, click and drag an item to the desired new location.

Once any deletions have been made, if any, and the list has been reordered as desired, click the 'Apply Changes' button to save the new design. Otherwise, click the 'Close without Saving' button to exit without saving the changes.

Current Data			Modified Data		
<input type="checkbox"/>	Vegetarian	VEG 1	<input type="checkbox"/>	Vegetarian	VEG 1
<input type="checkbox"/>	Low Salt	LoSalt 2	<input type="checkbox"/>	Low Salt	LoSalt 2
<input type="checkbox"/>	Vegetarian	Veg 3	<input type="checkbox"/>	Vegetarian	Veg 3
<input type="checkbox"/>	Low Potassium	LoPot 4	<input type="checkbox"/>	Low Potassium	LoPot 4
<input type="checkbox"/>	Low Acid	LoAcid 5	<input type="checkbox"/>	Low Acid	LoAcid 5
<input type="checkbox"/>	Small Portion	Small 6	<input type="checkbox"/>	Small Portion	Small 6
<input type="checkbox"/>	Low Spice	LoSpice 7	<input type="checkbox"/>	Low Spice	LoSpice 7
<input type="checkbox"/>	Diabetic	Diabetic 8	<input type="checkbox"/>	Diabetic	Diabetic 8
<input type="checkbox"/>	No Gravy	NoGrav 9	<input type="checkbox"/>	No Gravy	NoGrav 9

Illustration 200: Modify Diet Codes Checklist dialogue

You may make as many changes as you like while the window is displayed. No changes will be saved unless you close the window by clicking the **Apply Changes** button. If the window is closed by clicking the **Close without Saving** button, all modifications are discarded.

The box labeled **Current Data** displays the present list of Diet Codes for reference only. It is not editable. The box labeled **Modified Data** is the list of codes on which you will make your modifications.

To delete a diet code, click the checkbox on the line corresponding to the diet code you wish to delete. In this example:

Modified Data		
<input type="checkbox"/>	Vegetarian	VEG 1
<input type="checkbox"/>	Low Salt	LoSalt 2
<input type="checkbox"/>	Vegetarian	Veg 3
<input type="checkbox"/>	Low Potassium	LoPot 4
<input checked="" type="checkbox"/>	Low Acid	LoAcid 5
<input type="checkbox"/>	Small Portion	Small 6
<input checked="" type="checkbox"/>	Low Spice	LoSpice 7
<input type="checkbox"/>	Diabetic	Diabetic 8
<input type="checkbox"/>	No Gravy	NoGrav 9

Illustration 201: Diet Codes marked for deletion

The Low Acid and Low Spice diet codes are marked for deletion. Once all of the diet codes that are to be deleted have been marked with check marks, click the **Delete Checked** button. The codes will be removed from the list, and as each code is deleted a report will be generated listing all of the clients affected by that diet code.

At this point the codes could be rearranged, if desired. The codes can be moved by clicking and dragging to the desired position in the list or by using the **↑** (Up) and **↓** (Down) buttons on the screen. Once the list is arranged as desired, click the **Apply Changes** button. You will receive a confirmation dialogue indicating that the reordering process can take a long time. Click **OK** to proceed with the reordering or click **Cancel** to close the dialogue without initiating the process.

If you clicked **OK** to the confirmation dialogue, the reordering process will begin. The process can be very lengthy, depending upon the period of time that MealService has been in use, as all historical deliveries will be updated.

Automatically generating a Unique Record Number

A **Unique Record Number** (URN) is often assigned to each client by a state or other funding agency. The URN is often based on a combination of fields such as the Client's mother's maiden name, birth date, and a numeric component such as Social Security Number. MealService has the capability of generating a URN automatically, when triggered by the key combination **Control+Alt+U**. When triggered, if the Client record is currently under edit the user will be prompted as to whether the changes should be saved and the URN will then be generated. The URN field must be empty in order for a URN to be generated, otherwise the user will receive a message stating that the existing URN must be cleared before a new one can be created.

The query that drives the logic for the creation of the URN is stored in the Queries table, and must be named **POPULATE_URN**. The Queries table maintenance dialogue is accessed via the **Edit | Table Maintenance | Configuration** menu path, and then by selecting the Application Defaults tab. Clicking the **Edit Queries** button will launch the **Edit SQL Queries** dialogue. A typical query might appear as follows. In this example, an upper case URN is generated using the first three characters of the User Defined Field One, the Client's birth date in numeric MMDDYY format, and the eighth through twelfth digits of the Client's Social Security Number.

```

Update Clients set URN =
Upper(
  if ( substring( User_Def1 from 1 for 3) is null then '   ' else
substring( User_Def1 from 1 for 3))+
  IfNull( Extract(Month from DOB) then '   ' else if ( Extract(Month
from DOB) < 10 then '0'+Cast( Extract( Month from DOB ) as Char(1))
else Cast( Extract( Month from DOB ) as Char(2)) )) +
  IfNull( Extract(Day from DOB ) then '   ' else if ( Extract(Day from
DOB) < 10 then '0'+Cast( Extract( Day from DOB ) as Char(1)) else Cast(
Extract( Day from DOB ) as Char(2)) )) +
  IfNull( Substring( Cast( Extract(Year from DOB) as Char(4)) from 3
for 2) then '   ' else Substring( Cast( Extract(Year from DOB)
asChar(4)) from 3 for 2) )+
  Substring( Social_Security_Number from 8 for 4 )
)
where Clients.Person_ID = :Person_ID

```

NOTE: The query *must* include the Person_ID parameter (indicated in the above query by “:Person_ID”).

See also

Maintaining System SQL Queries, page 38

Mapping with MapPoint and Streets & Trips/AutoRoute

MealService offers mapping and routing functionality through integration with either Microsoft MapPoint and/or Microsoft Streets & Trips/AutoRoute (Streets & Trips covers the United States and Canada. In the United Kingdom the equivalent product is offered for sale under the name AutoRoute For clarity, both products will be referred to hereafter as Streets & Trips.) MapPoint is a very powerful mapping tool, and it can be controlled directly by MealService. (Direct integration requires MapPoint 2002, or later.) Streets & Trips is a very affordable mapping tool. For routing purposes it offers virtually the same functionality as MapPoint, however, data must be imported into Streets & Trips via a merge file.

MealService offers interfaces to mapping and routing in two locations: on the **Daily Run Preparation** screen and in the **Order Stops by Route** utility. On the Daily Run Preparation screen, access the mapping functionality by clicking the **Send to Mapping** button. In the Order Stops by Route utility, the mapping functionality is reached by clicking the **Send to Mapping** button (or by using the speed-key equivalent of **Control+M**). The two dialogues are illustrated below. You will notice that they are virtually identical, with the exception of the addition of a **Select Routes for Mapping** drop-down checklist on the **Daily Run Preparation** dialogue. Since both dialogues are so similar, they will both be discussed here, highlighting the one difference.

The 'Mapping Options' dialog box is shown with the following settings:

- Mapping Action:** ☒ Export to MapPoint/Streets & Trips
- Export File Name:** (Empty text field)
- Select Routes for Mapping:** (Empty dropdown menu)
- Starting and Ending Location:**
 - ☒ Include Starting
 - ☒ Include Ending
 - Organization Address:** (Dropdown menu)
 - Name:** Community Servings
 - Address:** 125 Magazine St
 - City:** Roxbury
 - State:** MA
 - ZIP:** 02119
- Buttons:** OK, Cancel

Illustration 202: Daily Run Preparation Screen Mapping Options dialogue when set to Export

The 'Mapping Options' dialog box is shown with the following settings:

- Mapping Action:** ☒ Export to MapPoint/Streets & Trips
- Export File Name:** (Empty text field)
- Starting and Ending Location:**
 - ☒ Include Starting
 - ☒ Include Ending
 - Organization Address:** (Dropdown menu)
 - Name:** Community Servings
 - Address:** 125 Magazine St
 - City:** Roxbury
 - State:** MA
 - ZIP:** 02119
- Buttons:** OK, Cancel

Illustration 203: Order Stops by Route Mapping Options dialogue when set to Export

The 'Mapping Options' dialog box is shown with the following settings:


- Mapping Action:** ☒ Integrate with MapPoint
- Export File Name:** (Empty text field)
- Starting and Ending Location:**
 - ☒ Include Starting
 - ☒ Include Ending
 - Organization Address:** (Dropdown menu)
 - Name:** Community Servings
 - Address:** 125 Magazine St
 - City:** Roxbury
 - State:** MA
 - ZIP:** 02119
- Buttons:** OK, Cancel

Illustration 204: Mapping Options when set to Integrate, illustrating Optimize and Retrieve Stops

The primary functional difference between the two dialogues is that when mapping is initiated from the Daily Run Preparation screen more than one route can be mapped at a time. This might be useful when one

driver is delivering several routes. When mapping is initiated from the Order Stops by Route utility, only one route can be mapped at a time.

The selections on the **Mapping Options** dialogue are as follows:

- **Mapping Action** — this setting determines whether MapPoint will be launched automatically or whether a merge file will be created for Streets & Trips.
- **Export to File Name** — When the mapping action is *Export to Streets & Trips*, a merge file must be specified. Enter the name of a file in the edit box, or click on the  button to launch a **Save Route Information** to dialog in which to specify the location and file name.
- **Optimize and Retrieve Stops** — When the mapping action is set to *Integrate with MapPoint*, this option enables retrieving MapPoint's optimized routing back into MealService.
- **Select Routes for Mapping** — This option is only available when mapping from the Daily Run Preparation screen. One or more routes can be selected from the drop-down checklist. To prevent the accidental mapping of perhaps hundreds of addresses, if no routes are chosen the following dialogue will be displayed after clicking **OK**:

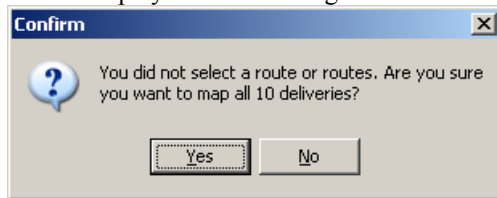


Illustration 205: Do you want to map all deliveries? Dialogue

Clicking **Yes** will map all of the deliveries. Clicking **No** will cancel the mapping process.

- **Include Starting (Location)** — This checkbox determines whether a Starting location will be included in the routing information. When this box is checked, the starting location specified in the **Name/Address/City/State/ZIP** fields will be included in the route as both the starting and ending points. When it is checked, it enables all of the following starting location edit fields. When it is not checked, the starting location fields are disabled.
- **Include Ending (Location)** — This checkbox determines whether an Ending location will be included in the routing information.
- **Location** drop-down list — This list includes all locations specified as a *Distribution Center* on the **Locations/Dist Centers** screen. (See “Screen 10: Locations/Distribution Centers”, Page 28). Selecting an item from the list will automatically populate the Name and Address fields below.
- **Name** — Enter or edit the name of the starting location, as desired.
- **Address** — Enter or edit the address of the starting location.
- **City** — Enter or edit the city or town of the starting location (the label varies, depending upon the **Phone/Postal Format** selected in the **Configuration** screen).
- **State** — Enter or edit the state of the starting location.
- **ZIP** — Enter or edit the ZIP or Postal Code of the starting location (the label varies, depending upon the **Phone/Postal Format** selected in the **Configuration** screen).

When the options have been set as desired, click the **OK** button to initiate the mapping action, or click the **Cancel** button to close the dialogue without performing any mapping.

➤**TIP**➤ If the **OK** button is not enabled, check to see which **Mapping Action** you have chosen. When **Export to Streets & Trips** is selected, the **OK** button will not become enabled until a merge file has been specified.

➤**TIP**➤ Selected Client records can be mapped, from both the **Daily Run Preparation** screen as well as the **Order Stops by Route** utility. When two or more records are selected in the **Daily Run Preparation** screen, upon clicking **OK** in the **Mapping Options** dialogue the following confirmation dialogue will be presented. The same dialogue will be displayed when one or more Client records are selected in the **Order Stops by Route** utility.

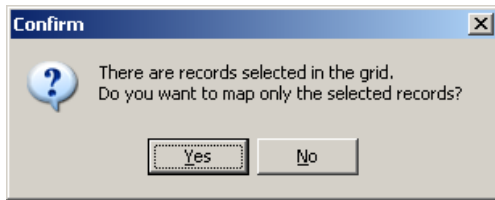


Illustration 206: Mapping Selected Records Confirmation

Clicking **Yes** will map only those Clients selected. Clicking **No** will map all of the Clients for the selected route.

When the **OK** button of the **Mapping Options** dialogue is clicked, one of the following actions takes place, depending upon the **Mapping Action** chosen.

■ **Integrate with MapPoint** was selected

With this selection, MapPoint will be launched automatically and each Client on the route(s) will be mapped. During the mapping process, if MapPoint can't locate one of the addresses the following information dialogue will be displayed:

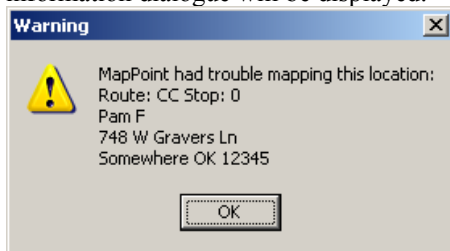


Illustration 207: MapPoint had trouble mapping Warning

Make a note of the Client and the address so that you can later resolve the issue from within MapPoint, then click **OK**. When MapPoint finishes mapping all of the addresses, MealService will bring MapPoint to the foreground, with the MapPoint Route screen selected. You can optimize the route, obtain driving directions, and print maps from within MapPoint. It is suggested that you refer to the MapPoint documentation for further information on using these features of MapPoint. When finished with MapPoint, do not close the MapPoint window. MealService will close the window automatically when the Daily Run Preparation screen (or the Order Stops by Route screen) is closed.

≧**TIP**≦ If it appears that MapPoint has 'frozen' while mapping a route, try returning to the MealService window (you can use **Alt+Tab** to cycle through all of your open Windows). You will probably find the *MapPoint had trouble mapping* dialogue displayed, waiting for your confirmation.

When MapPoint integration is utilized, you have the option of retrieving back into MealService MapPoint's route optimization. When this option is used, once the data has been sent to MapPoint you can reorder and edit the route as necessary in MapPoint. When finished with the route, **Alt+Tab** back to MealService, where the following message will have been displayed:

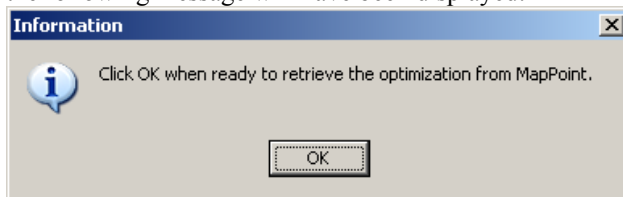


Illustration 208: Retrieve optimization when ready message

MealService waits until the **OK** button is clicked, at which time it will retrieve the newly assigned stop numbers for all of the route points. If two or more clients shared a stop (of other than zero) prior to route

optimization (for example, household members at the same address), those clients will still share the newly assigned stop after optimization. If recipients on a route shared a common stop, but had different decimal extensions (for example, 4.1 and 4.2), after optimization they will still share the same, newly assigned, stop (for example, they might be assigned 8.1 and 8.2).

➤**TIP**➤ Optimization cannot be retrieved when arbitrary records have been selected for mapping. The selection must be made by Route.

NOTE: Do not close the MapPoint window on your own. Since MealService launched MapPoint, MealService must close MapPoint. If it is not able to, it will not be able to map any additional routes until MealService has been re-started. In addition, if you modified the route while in MapPoint (such as having used the optimize route function), MapPoint will ask if you wish to save the changes to the map. If MealService appears to have ‘frozen’, try returning to the MapPoint window and respond to any of its requests.

■ **Export to Streets and Trips** was chosen

With this selection, MealService will create a merge file for the selected route. After the merge file has been created, the next step is to launch Streets & Trips and use Streets & Trips’ *Import Data Wizard*. Launch Streets & Trips, then, from the Streets & Trips menu select **Data | Import Data Wizard**.

1. The Import Data Wizard will be displayed, with the Open File screen page. Navigate to, and select, the merge file created by MealService. Click **Next**.
2. The next screen of the Wizard asks you to *Choose the separator character*. MealService uses a Comma as the separator, so select Comma if it is not already selected. Click **Next**.
3. The next screen asks you to *Select the appropriate Country/Region*. If in the United States select United States from the drop-down list, otherwise select Canada or United Kingdom, as appropriate.
4. The *First row contains column headings* checkbox should be checked. Click **Next**.
5. Click **Finish**. The Wizard will process each of the addresses, in turn. It will stop on any records that it has trouble mapping, and display a dialogue with which you can resolve the problem (by selecting one of the suggested addresses or by skipping the address). Resolve each of the errors, in turn. When the mapping process is completed you will be returned to the Streets & Trips main screen, with pushpins on the map representing each mapped address.
6. Select **Route | Route Planner** from the Streets & Trips menu.
7. Click and drag the mouse on the map, to draw a *Boundary Box* rectangle just inside the edges of the map. The rectangle should enclose all of those pushpins to be included on the route. **NOTE:** If you click too closely to the edge of the map the cursor becomes an arrow, similar to the following:



This cursor indicates that the map is about to be moved in the direction of the arrow! If this is the cursor displayed, try lifting the mouse and positioning it just a bit further from the edge of the map.

Having drawn a Boundary Box, select **Pushpins in selected area** from the Streets & Trips **Type place or address** drop-down list. Then click the **Add to Route** button. The pushpins contained within the *Boundary Box* will be added to the route. Here is the Streets & Trips Route Planner screen showing the Add Location drop-down list:

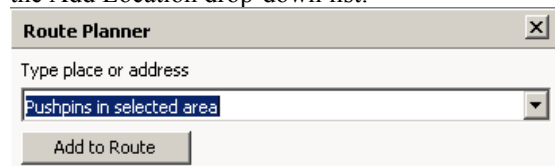


Illustration 209: Streets & Trips Add to Route screen

All of the addresses on the route should now be displayed in the Streets & Trips route list. At this point, you can optimize the route, obtain driving directions, and print maps from within Streets & Trips. It is

suggested that you refer to the Streets & Trips documentation for further information on using these features of Streets & Trips.

See Also

How to Create a Delivery Report, Page 116

Order Stops by Route, Page 165

Configuring Auto-executing Queries

MealService supports three customizable system queries that can be automatically ‘triggered’ by certain events. Virtually anything that can be calculated or performed in a query can be executed automatically. For example, any, or all, of the following tasks could be easily implemented:

- clients’ status can be changed to *Stopped* on the appropriate day based on the clients’ stop date
- clients can be assigned a staff contact based upon the client’s name or other arbitrary logic
- a calculated field can be automatically calculated and stored
- follow-ups can be assigned to staff members for all newly entered clients.

The three events that trigger a query are

- when MealService is opened
- when MealService is being closed
- after a change is made to any client’s information

The queries that are executed on these events are all stored in the System Queries table and must be named according to the event that is to trigger their use. The Queries table maintenance dialogue is accessed via the **Edit | Table Maintenance | Configuration** menu path, and then by selecting the Application Defaults tab. Clicking the **Edit Queries** button will launch the **Edit SQL Queries** dialogue. The three queries need to be created and named as follows. In all cases, the name is case sensitive:

- The query that executes when MealService is opened must be named **EXECUTE_ON_OPEN**. In order for the query to be triggered, the query statement must be properly populated and user profiles must be specifically configured to trigger the query. See “Setting Up Users and Assigning Access Levels”, page 13, on how to configure user profiles. Once a user profile has been configured to trigger the query, that user will receive a confirmation dialogue immediately after logging-in to MealService. The dialogue will appear as follows:

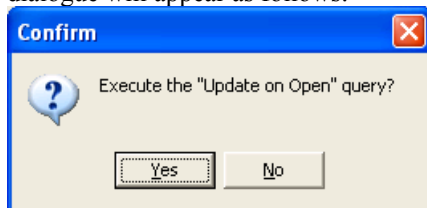


Illustration 210: Execute query confirmation dialogue

Responding **Yes** to the dialogue will execute the query, after which MealService will be displayed as usual. Responding **No** to the dialogue will avoid executing the query, and MealService will start as normal.

- The query that executes when MealService is closed must be named **EXECUTE_ON_CLOSE**. In order for the query to execute, the query statement must be properly populated and user profiles must be specifically configured to trigger the query. See “Setting Up Users and Assigning Access Levels”, page 13, on how to configure user profiles. Once a user profile has been configured to trigger the query, that user will receive a confirmation dialogue immediately after selecting **Exit** from within MealService. The dialogue will appear similar to that of Illustration 210. Responding **Yes** to the dialogue will execute the query, after which MealService will close. Responding **No** to the dialogue will avoid executing the query, and MealService will simply close as normal.
- The query that executes after a client’s record is edited must be named **EXECUTE_ON_POST**. In order for the query to execute, the query statement must be properly populated. Unlike the above two queries that can be configured to execute only for selected users, this query will always execute regardless of the user.

See also

Maintaining System SQL Queries, page 38

Automatically generating a Unique Record Number, page 177

Consolidate Duplicates

By design, MealService attempts to eliminate duplicated records. Duplicates do occur occasionally, however. MealService includes a utility for consolidating duplicated Client or Individual records, when they are discovered. There is one utility for Client records and one for Individual records. Both function similarly, so they will both be addressed here.

To launch the Consolidate Clients dialogue, select **Utilities | Consolidate Duplicates | Consolidate Clients** from the main menu. To launch the Consolidate Individuals dialogue, select **Utilities | Consolidate Duplicates | Consolidate Individuals** from the same menu. Once launched, the dialogues will be similar to the following:

Person ID	36	41
Client ID	1032.0	1030.5
First Name	Pat	Pat
Mid Name		
Last Name	Frank	Frank
Address 1	1 Good Dr	111 Walker Ave
Address 2		
City	Somewhere	
State	OK	
ZIP	12345	
Status	Active	Active
Services Used	1	1
Counseling Services		
Delivery Type	Ongoing	Episodic
Monday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Tuesday	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>

Illustration 211: Consolidate Duplicate Clients dialogue, with context menu

At the **Person ID, Retained** prompt enter the Person ID for the record that is to be retained. **Note**, this is the Person ID *not* the Client ID. The Person ID can be obtained by browsing the Clients data. The Person ID column is normally the first column displayed.

At the **Person ID, Duplicated** enter the Person ID for the record that contains duplicated information, but is to be discarded.

Once both Person ID fields have been populated, as desired, click the **Retrieve** button. The screen will refresh to display the contents of the two records, as in Illustration 211.

The next step is to visually compare the two records. The record on the left is retained, so the contents of that column should reflect everything that you want saved. Any of the fields can be edited in place, as long as the contents of the field are not grayed. (In the illustration above, the grayed fields are in blue.) If there is data in the right column that is correct and you need to move it to the left column, you can take one of two actions: you can make sure the row in question is highlighted and press **Control+M**, or you can right-click on the row and select **Move Selected Data Right to Left** from the context menu. That will move make the left column match what is in the right column. If you need to undo a change, you can take one of two actions. You can press **Control+U** or you can right-click and select **Undo Move** from the context menu. The Undo process can be stepped back, undoing one change at a time in reverse order that the changes were made.

Once the contents of the left column have been edited as desired, click the **Consolidate** button. It will collapse all of the records into one, consolidating any affiliated data as well. For example, if both records had counseling records attached to them, all of the counseling history will be attached to the retained record.

Chapter 8: The Menu Structure and Speed Keys

The Menu Structure

Many menu items duplicate functionality that can also be accessed via other means. For example, the Browse View is accessible through the **View | Browse** menu tree, but it is also available using the **Browse** Button. Several items, however, are only accessible via the menu. Some of those items include printing the *All Information on a Client* report, deleting a person, and adding or editing notes on a person.

- File
 - Print
 - Screen
 - Client Delivery Directions — Control+D
 - All on this Client
 - Health/Nutrition History
 - Refresh Lists — this option refreshes all of the drop-down and other pick lists
 - Exit
- Edit
 - Next Client
 - Prior Client
 - First Client
 - Last Client
 - Edit Notes — Control+N
 - Routes and Stops
 - Address Overrides
 - Client Pop-Ups
 - Add (or Edit) Client Pop-Up — Control+Alt+P
 - Delete Client Pop-Up
 - Alerts and Follow-Ups — Control+F
 - Add New Person
 - Delete Current Person
 - Special Meals
 - Table Maintenance
 - Configuration
 - Certification Conditions
 - Client Documents
 - Cold Bag Codes
 - Cold Bag Usage
 - Cuisines
 - Diet Modifications
 - Diseases
 - Event Types
 - Funding Sources
 - Locations/Dist Centers
 - Marital Status
 - Meal Items
 - Race Codes
 - Routes
 - Services
 - Staff Members
 - Stop Reasons
 - ZIP Codes
- View
 - Browse View

- Contact Summary
 - Recent Deliveries
 - Status History
 - System History
 - Status Filter
 - Custom Filter
- Reports
 - Process
 - Daily Deliveries
 - Print
 - Delivery Reports
 - Delivery Reports and Labels
 - Recent Stops and Suspensions
 - Counseling Reports
 - Alerts/Follow-Up Reports
 - Agency Reports
 - Other Reports
 - Clients Listing
 - Household Members
 - Relationships
 - Clients by Selected Diet
 - User-Defined Reports
 - Report 1 through Report 5
 - Mail-Merge
 - Filtered Clients
 - Custom Mail-Merge
 - Client Invoices
 - Analyze
 - Query Builder
 - Intelligent Browse
 - Report Designer
 - Charts
 - View and Print Charts
- Utilities
 - Verify Delivery Conditions — Control+Alt+V
 - Record Missed Deliveries
 - Order Stops by Route
 - Update Stopped Status
 - Inactivate Stopped Clients
 - Summarize Missed Deliveries
 - Archive Records
 - Delete Delivery Credits
 - Reset First Contact Date
 - Execute Query — Control+Q
 - Consolidate Duplicates
 - Consolidate Clients
 - Consolidate Individuals
- Plug-Ins
- Help
 - MealService on the web
 - About

Speed Keys

The following speed key combinations are available on the main Client screen:

Alt+A	Add New Client dialogue
Alt+B	Browse View
Alt+F	Go to First Record
Alt+H	Households dialogue
Alt+I	Status Filter dialogue
Alt+L	Go to Last Record
Alt+M	Household Members dialogue
Alt+N	Go to Next Record
Alt+O	Custom Filter dialogue
Alt+P	Go to Prior Record
Alt+X	Exit MealService
Control+C	Copy (the standard Windows Copy command)
Control+D	Delivery Report (single Client)
Control+F	Alerts/Follow-Up View
Control+H	Households dialogue
Control+I	Set Custom Items dialogue
Control+M	Household Members dialogue
Control+N	Client Notes View
Control+P	Preferences/Dislikes dialogue
Control+Q	Execute Query
Control+S	Jump the cursor to the Search field
Control+V	Paste (the standard Windows Paste command)
Control+Alt+C	Cuisine dialogue
Control+Alt+F	Edit Follow-Up
Control+Alt+I	Copy Individual name and address to clipboard
Control+Alt+N	Copy Client name and address to clipboard
Control+Alt+P	Add or Edit Pop-Up
Control+Alt+U	Populate URN
Control+Alt+V	Verify Delivery Conditions

This page intentionally blank.

Chapter 9: External Utilities

Database Administrator (dbAdmin.exe)

The Database Administrator is used to set the location of the MealService data files and the method of connecting to those files (either File Sharing or Client-Server). It must be run prior to starting MealService the first time, or thereafter any time the data files are moved from one location to another or a user's connection method is to be changed. (The installation routine on the Install CD also performs the functionality of the Database Administrator.) The Database Administrator is accessed from the Windows **Start** Menu in the **Programs | MealService** group.

The **Operation Mode** determines how MealService will connect to its data. Setting this option to **File Server** means that MealService will connect to a standard shared directory somewhere on the network (or locally, if MealService is running on a single PC). Setting this option to **Client-Server Engine** instructs MealService to access its data via a Client-Server engine.

When set to **File Server**, the Database Administrator has an entry labeled **Database Location**. The location of the data (that is, the directory containing the data you want to use) should be listed in that edit field. See the following illustration:

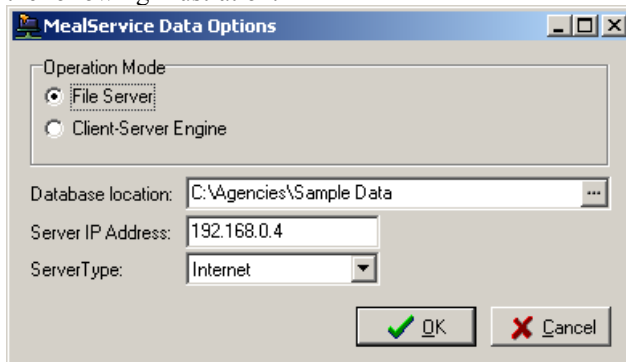


Illustration 212: Database Administrator screen, set to File Server mode

If the directory listed does not reflect the actual location of the data, then click on the ellipsis (...) button to the right of the name of the existing data directory. In the resulting **Locate MealService Data folder** dialogue, navigate to the appropriate directory (that is, the directory containing the data). See the following illustration:

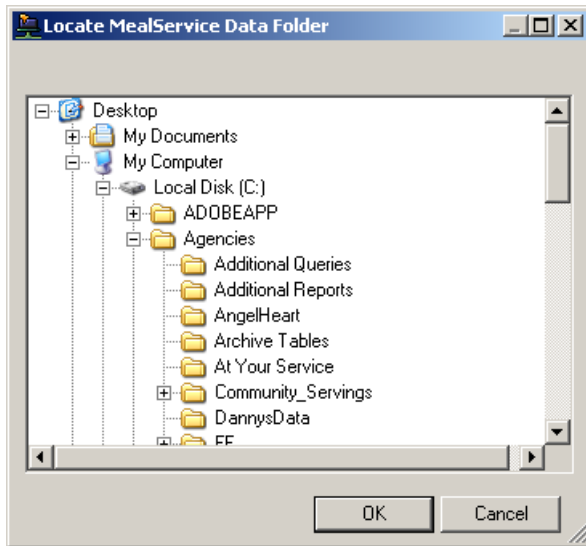


Illustration 213: Locate MealService Data Folder dialogue

When you have located the correct data folder, click on the name of the folder to select it, then click **OK** to close the **Locate** dialogue.

When set to **Client-Server Engine**, the Database Administrator has an entry labeled **Shared Ini Directory**. The location of the report and initialization files should be listed in that edit field. See the following illustration:

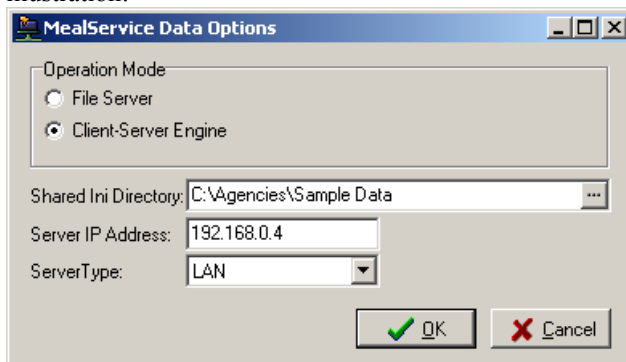


Illustration 214: Database Administrator screen, set to Client-Server mode

If the directory listed does not reflect the actual location of the report files, then click on the ellipsis (...) button to the right of the existing directory. In the resulting **Locate MealService Data folder** dialogue (which will be similar to Illustration 213), navigate to the appropriate directory (that is, the directory containing the report files), select the correct folder name, then click **OK** to close the **Locate** dialogue.

The **Server IP Address** entry only has a bearing if connecting via the Client-Server engine. It can be ignored if connecting via File Server mode. The Server IP Address consists of four groups of 1- to 3-digit numbers, separated by decimals (as in 111.11.111.1). This entry must be set to the IP address of the server on which the Client-Server Engine is running.

The final entry is a drop-down list labeled **Server Type** and only applies if the **Client-Server Engine** is being used. The available selections are **LAN** or **Internet**. This should normally be set to LAN, unless the user were connecting over a relatively slow dial-up connection, in which case it could be set to Internet.

The Database Administrator creates its entries locally in the registry of the PC. That means that it must be run locally on any machine prior to launching MealService on that same machine. If, upon launching

MealService, you receive an error message stating “The MealService database has not been defined” most likely it is due to the Database Administrator not yet having been run.

Database System Utility (DBSys.exe)

This utility is used to modify MealService’s tables, add or delete indexes, or to repair the data when necessary. If MealService was installed using the installation CD then the Database System Utility is launched from the **Programs | MealService** Group on the **Start** menu. Otherwise this program is available on the installation CD.

If you are going to have the Database System Utility connect to the MealService data via the Client-Server engine, first verify that the IP Address of the engine has been properly configured. From the Database System Utility menu select **File | Options...** In the resulting dialogue, verify that the IP Address of the Client-Server engine has been properly specified.

Restructure (modify the structure or indexes of) a table

To launch the Restructure module, select **Utilities | Restructure** from the Database System Utility menu. A dialogue similar to the following will be generated:

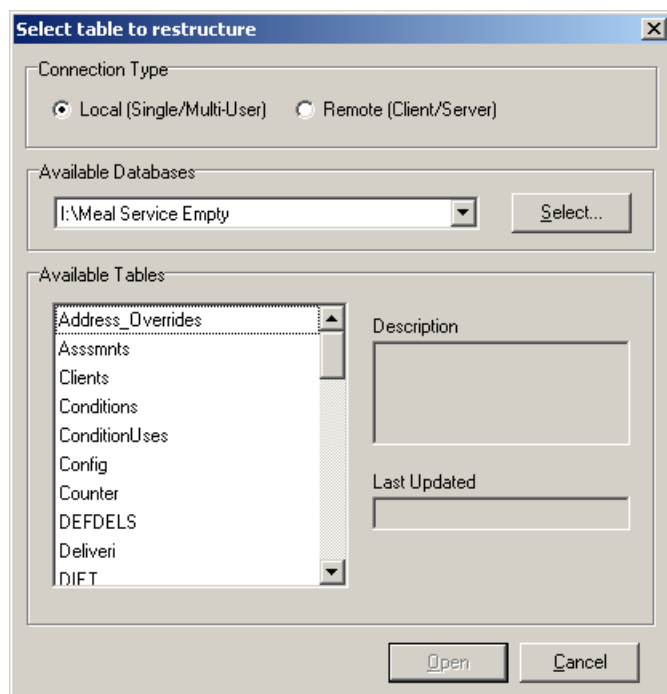


Illustration 215: DBSys Select Table to restructure dialogue

Connection Type: The choices are **Local (Single/Multi-User)** and **Remote (Client/Server)**. Unless you have purchased the Client-Server version of MealService, select **Local (Single/Multi User)**. If you have the Client-Server version of MealService, you may select **Remote (Client/Server)**. If you do so, you will be prompted to log-into the Server. In the **Remote Login** dialogue, enter sysadmin at the **User Name** prompt and sysadmin at the **Password** prompt.

Available Databases: if the path shown under **Available Databases** is not the current location of the MealService data, click on the **Select** button and, using the resulting **Browse for Folder** dialogue, navigate to and select the correct location.

Available Tables: This list-box will list all of the tables in the chosen database. Select the necessary table by clicking on its name and then clicking **Open**.

You will then be presented with the **Modify Table Structure** dialogue, as illustrated:

Modify Table Structure - Config (I:\Meal Service Empty\Config)

Structure | Secondary Indexes

Version # Language

Description Sort

Encrypted ☐ Password

Descending Primary Index ☐ Case-Insensitive Primary Index ☐ Primary Index Compression

#	Field Name	Data Type	Size	Required	Primary Index	Details
1	RecordID	AutoInc	0	No	Yes	No
2	ORGANIZATN	String	50	No	No	No
3	ORG_ADDR	String	50	No	No	No
4	ORG_CITY	String	25	No	No	No
5	ORG_STATE	String	2	No	No	No
6	ORG_ZIP	String	10	No	No	No

of Fields Total Record Size BLOB Block Size Last Auto-Inc Value

Illustration 216: DBSys, table restructure dialogue, fields tab

Fields can be added or deleted via this dialogue, and indexes can be created or dropped.

To modify a table (such as adding or dropping a field), use the tab at the top of the screen labeled **Structure**

To add a field, click anywhere in the **Field Name** column, and navigate to the bottom of the list by pressing the **Down-Arrow** (↓) key on your keyboard as many times as needed. Add an empty record at the bottom of the list by pressing the ↓ key one more time. Enter the **Field Name** as instructed by technical support, select the appropriate **Data Type** from the drop-down list, and enter the **Size** of the field, if required. Save the changes to this field by pressing the **Up-Arrow** (↑) key on your keyboard.

The new field can be moved in the list of fields, if necessary. First, make sure it is selected. When selected, the field will be highlighted in blue. Use the **Up** and **Down** buttons on the left of the **Modify Table Structure** screen to move the field to its final location.

To delete a field, select the correct field by clicking on the name. When selected, the field will be highlighted in blue. On your keyboard, hold down the **[Control]** key and simultaneously press the **[Delete]** key (**Control+Delete**). You will be presented with a confirmation dialogue: *Are you sure you want to delete this field?* If you have been instructed by technical support to delete the field, and you have verified that the correct field is chosen, click on the **Yes** button.

To modify the indexes, use the tab at the top of the screen labeled **Secondary Indexes**. That screen should look similar to the following:

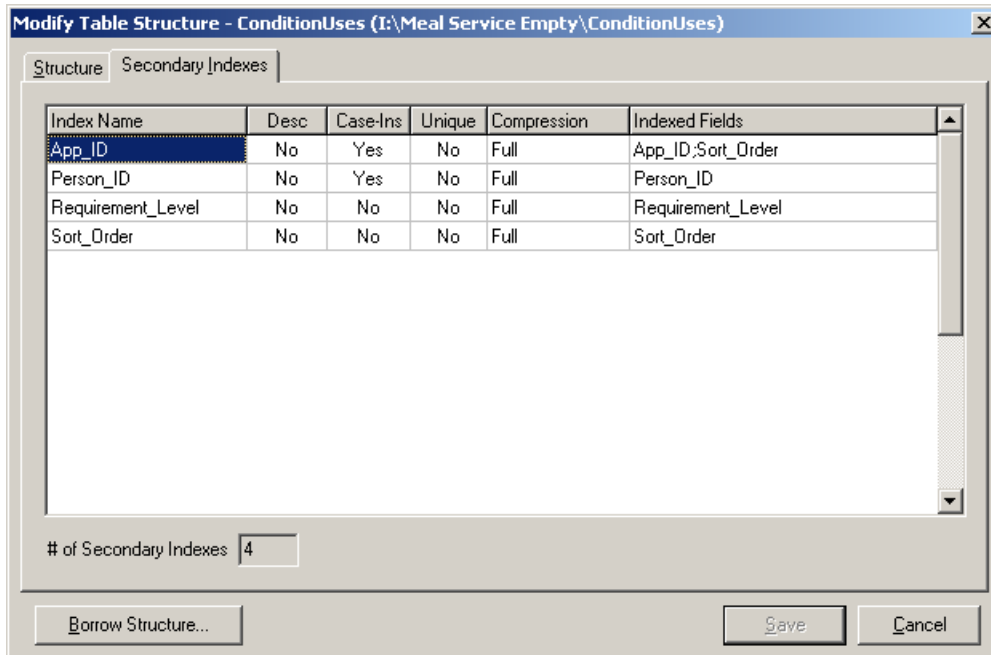


Illustration 217: DBSys, table restructure dialogue, Secondary Indexes tab

To add an index, click anywhere in the **Index Name** column, and navigate to the bottom of the list (in the above example there are four indexes in the list). When on the last entry in the list, pressing the *Down-Arrow* (↓) key one additional time will add an empty record to the bottom of the list. In the new, blank, line enter the **Index Name** as instructed, and select the options for the next four columns as instructed. To identify the **Indexed Fields**, click on the rightmost portion of that column and an ellipsis button (...) will become visible. Click on the ellipsis button to launch the **Details for Secondary Index Sort Order** dialogue:

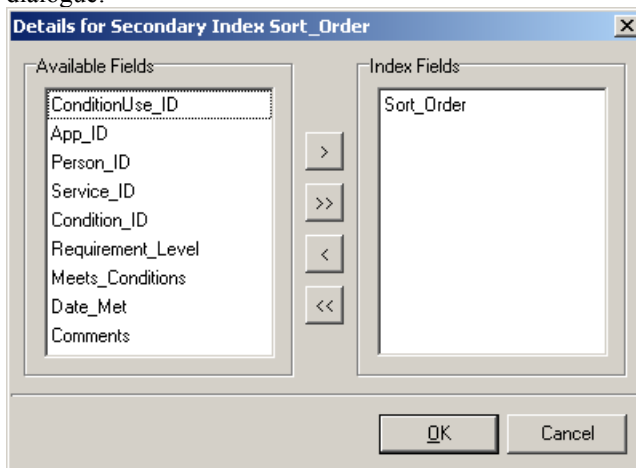


Illustration 218: DBSys, Secondary Index details dialogue

As instructed, select the appropriate field from the list of **Available Fields** on the left. Click on the button in the center labeled '>' to move the selected field to the list on the right. If there are more fields to be added to the index, select the next field from the list of **Available Fields** on the left, and move it to the right by clicking on the '>' button. If an inappropriate field is accidentally moved to the right, select it in the list of **Index Fields** and click on the '<' button to move it back to the left. Once the correct fields have been added to the index, click the **OK** button.

To delete an index, in the **Modify Table Structure** dialogue, select the correct index by clicking on its name

in the column labeled **Index Name**. When selected, the index will be highlighted in blue. On your keyboard, hold down the **[Control]** key and simultaneously press the **[Delete]** key (**Control+Delete**). You will be presented with a confirmation dialogue: *Delete this secondary index?*. If you have been instructed to delete the index, and the correct index is chosen, click on the **Yes** button.

Deleting indexes is far less destructive than deleting a field. Once a field has been deleted it is gone forever. A deleted index can be recreated, if necessary.

Once all required changes have been made to the table, click the **Save** button. Click the **Cancel** button to close the Modify Table Structure window without applying any of your changes.

⚠ DO NOT modify any table structures unless instructed to do so by Technical Support. Future data loss could result, as upgrades expect the table structure to conform in both layout and field order.

NOTE: All users must exit MealService before any table modifications can be undertaken. Upon clicking **Save**, if a table is in use the following error message will be displayed: *DBISAM Engine Error # 11013: Access denied to table 'TableName.DAT'*

Repairing a table

To launch the Repair module, select **Utilities | Repair** from the Database System Utility menu. A dialogue similar to the following will be generated:

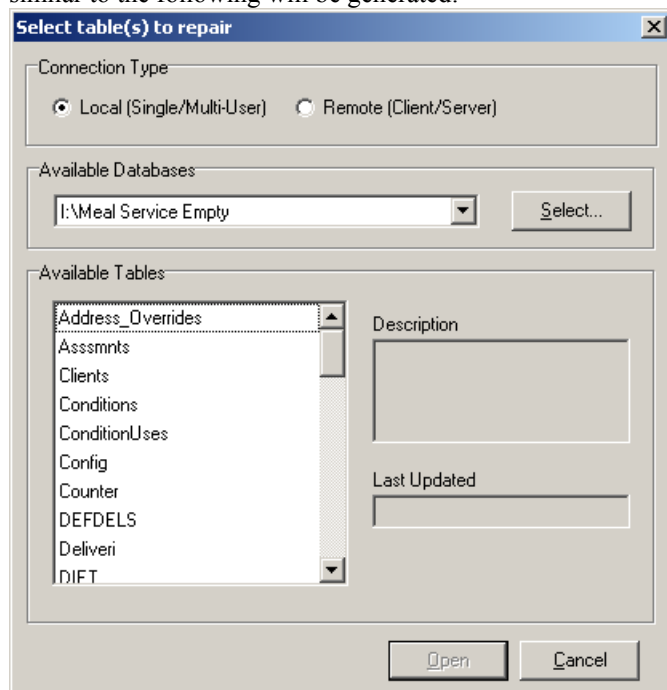


Illustration 219: DBSys Select Table(s) to Repair dialogue

Connection Type: Unless you have purchased the Client-Server version of MealService, select **Local (Single/Multi User)**. If you have the Client-Server version of MealService, you may select **Remote (Client/Server)**. If you do so, you will be prompted to log-into the Server. In the **Remote Login** dialogue, enter sysadmin at the **User Name** prompt and sysadmin at the **Password** prompt.

Available Databases: if the path shown under **Available Databases** is not the current location of the MealService data, click on the **Select** button and, in the resulting **Browse for Folder** dialogue, navigate to and select, the correct location.

Available Tables: This list-box will list all of the tables in the chosen database. Select the necessary table by clicking on its name and then clicking **Open**.

Clicking **Open** will launch the repair process. Monitor the status of the repair by using the status panes on the bottom of the window. Very large tables can take up to an hour to repair... **DO NOT** interrupt the process! Once the process is completed you will be presented with an Information box stating that the repair has been completed. Clicking **OK** will then result in a status box with two buttons: **Save Log to Disk** and **Close**. Unless you have been instructed to save the log, there is no need to save it. Simply click the **Close** button to close the window.

Repairing a table can be done at any time. Note, however, that *all users* must exit MealService while a repair is underway. If damage to a table occurs by, for example, a workstation being unexpectedly turned off while processing data, you may subsequently receive a message from MealService indicating that the data or an index is corrupt. Do not hesitate to run a repair on the affected table(s).

CodeSite

CodeSite is a diagnostic tool, and you will be instructed to install it, should the need arise. The CodeSite install is located on the **Start** Menu in the **Programs | MealService** group or on the installation CD. Once installed, CodeSite is invoked by changing the shortcut used to launch MealService by adding *Command-Line Parameters*. In the shortcut's **Target** entry, the following command-line parameter is appended to the existing entry:

```
-CodeSite=FILE
```

so that the final Target entry should appear something similar to the following:

```
"C:\program files\MealService\mlsvc.exe" -CodeSite=FILE
```

MealService will, by default, create its CodeSite log file in the root of the C: drive. If it is necessary to create the log file in a different location (due, possibly, to organization-assigned security restrictions) a second command-line parameter can be added to the MealService shortcut. Adding

```
-CodeSitePath=c:\logfile
```

to the shortcut will create the log file in the path specified after the = character. In the example above, the log file will be created in the *c:\logfile* directory. **Note:** the directory must exist prior to launching MealService and there can be no spaces in the path name. Using the Windows *Temp* system variable is an option, if the location of the log file needs to vary based upon the Windows user. For example:

```
-CODESITEPATH=%temp%
```

will create the log file in the Windows' user's temporary directory. Unfortunately, the *User Profile* system variable cannot be used in the same manner, because the User Profile resolves to a path name with spaces in it (the Temp variable, on the other hand, resolves to a path using the old 8.3 naming convention, so there are no embedded spaces.)

Each of the command line parameters are separated from each other with a space , and must not contain any spaces within the parameter itself. Case sensitivity is not an issue. (Upper and lower case have been used in the examples simply for clarity). An example of a shortcut in which CodeSite is both turned on and a log file location is specified, is as follows:

```
"C:\program files\MealService\mlsvc.exe" -CodeSite=FILE
```

```
-CodeSitePath=c:\temp
```

Launching MealService using a CodeSite-modified shortcut will send diagnostic feedback to a log file. The log file is named MealService.csl. It will be created in the root of the C: drive (assuming no alternate location has been specified with a command-line parameter). Typically, you will be asked to submit the CodeSite log file for analysis.

NOTE: The CodeSite log file can grow to be quite large. It is important to turn CodeSite off, by restoring the shortcut to its prior setting, immediately after the need for CodeSite has been resolved. If the log file is large, you may also want to delete it to free the disk space, once it has been successfully submitted for analysis.

Part 3: Appendixes: Managing the MealService Infrastructure

Installation and Configuration

There are two versions of MealService available: one that supports Plug-Ins and one that does not. The version that does not support Plug-Ins is no longer available, however, its description is included here for those organizations that may still have it installed.

MealService with Plug-In Support

This version of MealService consists of one executable file: MISvc.exe and approximately 12 supporting files (typically BPL files, but usually also one DLL file.) The executable and supporting files can be placed locally on each workstation, or one copy can be placed on a network drive with a shortcut on each workstation pointing to the shared executable on the network drive. The supporting files must all be located in the same directory as the MealService executable (MISvc.exe), so therefore no registry entries are required other than the registry entry created by running the Database Administrator (see “Installation Issues common to both versions”). The Plug-in capability is described in the section “Plug-Ins”, Page 207.

MealService without Plug-In Support

This version of MealService consists of one executable file: MISvc.exe. No installation is required, as there are no dependent files (DLLs or BPLs) used. The executable can be placed locally on each workstation, or one shared copy can be placed on the network with a shortcut on each workstation pointing to the network location. **NOTE:** This version has been deprecated and is no longer actively supported.

Installation Issues common to both versions

A registry entry, pointing to the location of the data, must be made on each workstation before running MealService. That registry entry is created using the Database Administrator utility. (When the installation is run from the installation CD, the installation utility will create a registry entry pointing to the demo data. Running the CD installation is not required, however, as long as the Database Administrator is used to create the appropriate entry before running MealService.)

In a networked environment for multi-user access, the data files should reside in a shared network directory and every user must have read/write permissions for that directory. Read/write permission is required at the operating system level, regardless of the user’s internal MealService access rights.

If there is any sort of anti-virus software running on the server, for performance reasons it is important to exclude the MealService data folder from scanning or, at a minimum, to exclude the MealService data files from its scanning list. If the exclusion is to be handled on a file-type basis, the following file extensions should be excluded: *.dat, *.idx, *.blb, *.spq, *.sql, *.rtm.

The accompanying executables (DBSys, Database Administrator, etc.) can be handled in the same manner as MealService, if desired. That is, one copy can be maintained on the server and local shortcuts (pointing to the respective executables) created on each workstation.

See Also

Database Administrator (dbAdmin.exe), page 191

Configuring the DBISAM Client-Server Engine

The Client-Server engine can be installed and configured using the following procedures.

There are four executable files involved in a Client-Server installation. Two are additional to the executables required for a file-sharing installation) and their roles, are:

DBSrvr.exe – the Client-Server engine. This is installed on the server, either as a process or an application, and serves the data to MealService.

SrvAdmin.exe – the Server Administrator. This is also installed on the server, and is used to administer the Client-Server engine.

dbAdmin.exe – MealService’s Database Administrator. This is used to create the local registry entries so that MealService will know where to find its data. This file is common to both the Client-Server and file-sharing installations.

MISvc.exe – the MealService executable itself. This file is also common to both the Client-Server and file-sharing installations.

The steps to install and configure the Client-Server engine are as follows:

1. Install the Client-Server engine using the supplied installation routine. If installed on a server on which user-rights have been defined, the user account under which the installation occurs must have administrative rights. The engine can be installed as an application or as a service. It is suggested that it be installed as a service.

If running the server as a normal application there is nothing else to do besides launching the server from the directory in which the engine was installed. Creating a shortcut to DBSrvr.exe in the StartUp folder will ensure that the engine is started when the Server is rebooted.

If you wish to run the server as a Windows NT/2000 service you must install it as a service by running the server with the /INSTALL command-line switch. For example, to install the server as a service using the Run command window under Windows NT you would specify the following command:

DBSRVR.EXE /INSTALL /NOINTERACT

The /NoInteract switch is used so that the service will be installed as a non-interactive service and the server will not display a user interface when it is started.

To uninstall the server as a Windows NT/2000 service you must run the server with the /UNINSTALL command-line switch. For example, to uninstall the server as a service using the Run command window under Windows NT you would specify the following command:

DBSRVR.EXE /UNINSTALL

2. Install the Server Administrator. Once installed, launch it so that the server can be configured. We must first configure the Server Administration Utility so that it can connect to the Client-Server engine. To do so, select **File | Options** from the menu. The options should be set as follows:
Remote Type: the choices are **Local Area Network** and **Internet**. Assuming you are running the server locally on your network, select Local Area Network.
Host Name: can be ignored.
IP Address: enter the IP address of the machine on which the Client-Server engine is running. The remainder of the options can be ignored. Click the **OK** button.
3. Now we should be able to log in. From the Server Administrator menu, select **File | Login to Server** to display a **Remote Login** screen. You must use the default User and Password until the MealService user has been created. The default User ID and Password are as follows:

User ID: Admin (case-insensitive)

Password: DBAdmin (case-sensitive)

Having logged-in, you should now have the following screen:

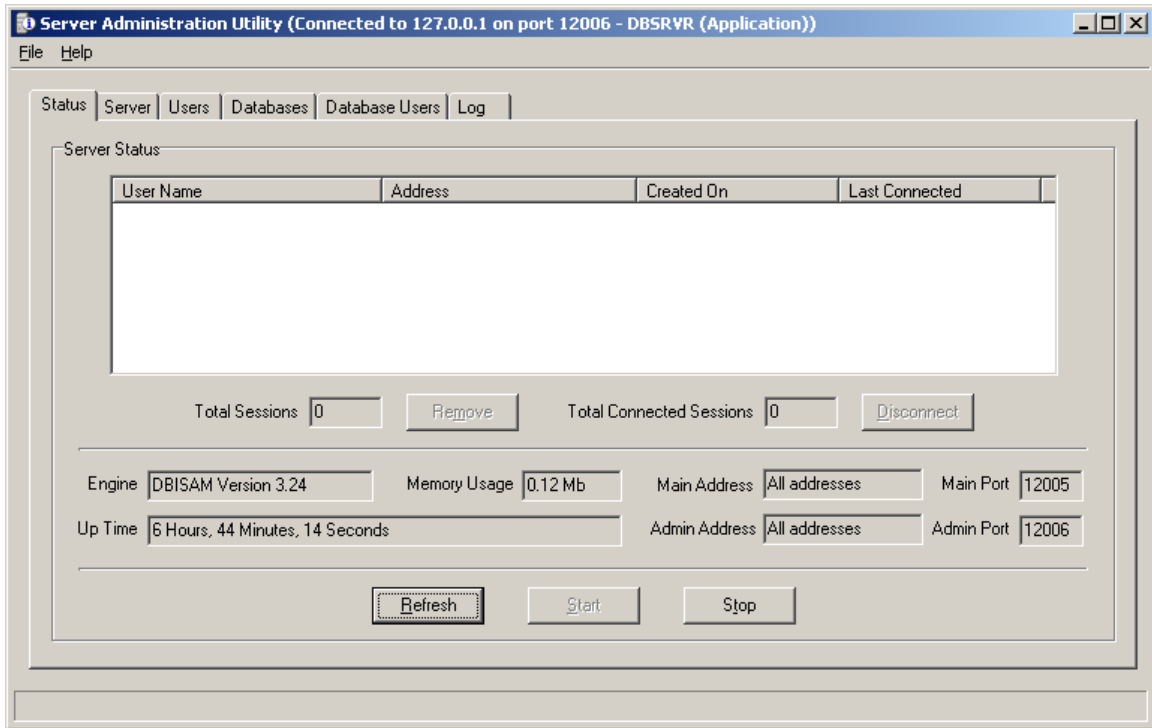


Illustration 220: Server Administration Utility, Status tab

The tabs with which we will be concerned are Users, Databases and Database Users. **NOTE:** There is online help available from within the Server Administrator for help on the tabs not being discussed here.

4. Select the **Users** tab, which will appear as follows:

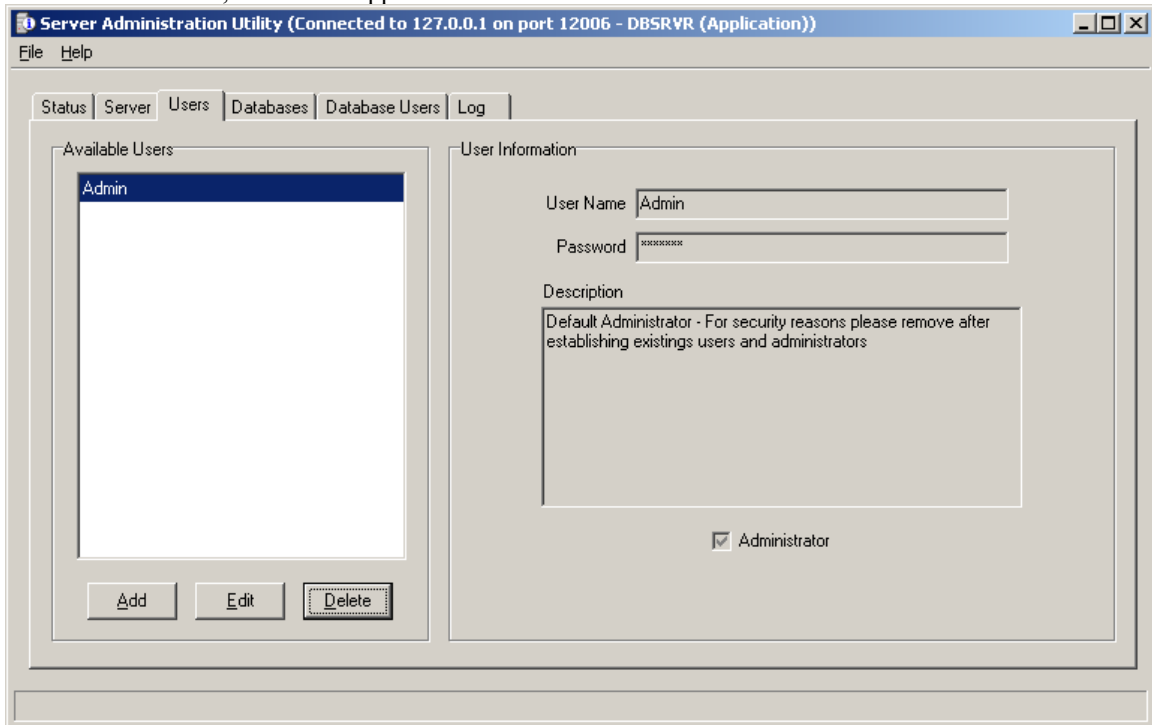


Illustration 221: Server Administration Utility, Users tab

We will now create the default MealService user. Click on the **Add** button. The User Name, Password, Description, and Administrator fields will become enabled. Enter the following information:

User Name: type sysadmin, in lower case

Password: type sysadmin, in lower case

Description: can be left blank

Administrator checkbox: should be checked.

Click the **Save** button to save the addition.

5. Select the **Databases** tab. To create the MealService database, click the **Add** button. The Name, Description and Directory fields will become enabled, as illustrated:

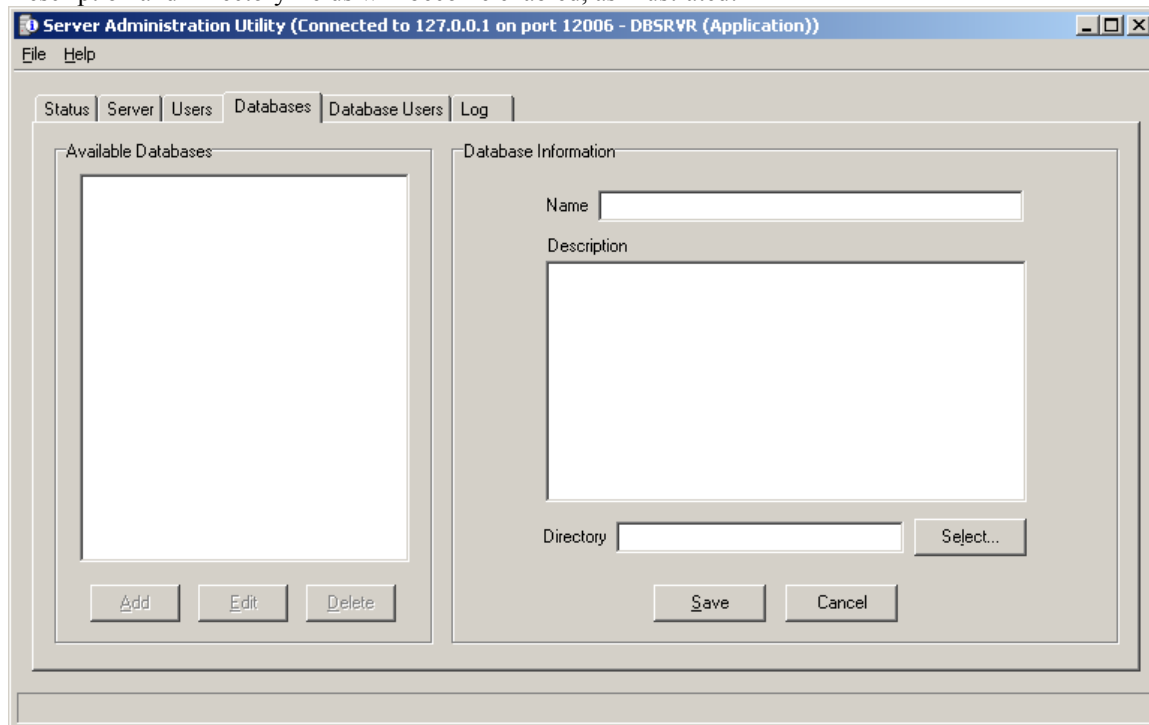


Illustration 222: Server Administrator, Databases tab

Enter the following information:

Name: enter MealService

Description: can be left blank

Directory: click on the **Select...** button, and in the resulting **Browse for Folder** dialogue, navigate to and select the directory containing the MealService data.

Click the **Save** button to save the Database.

6. Finally, select the **Database Users** tab. It will appear as follows:

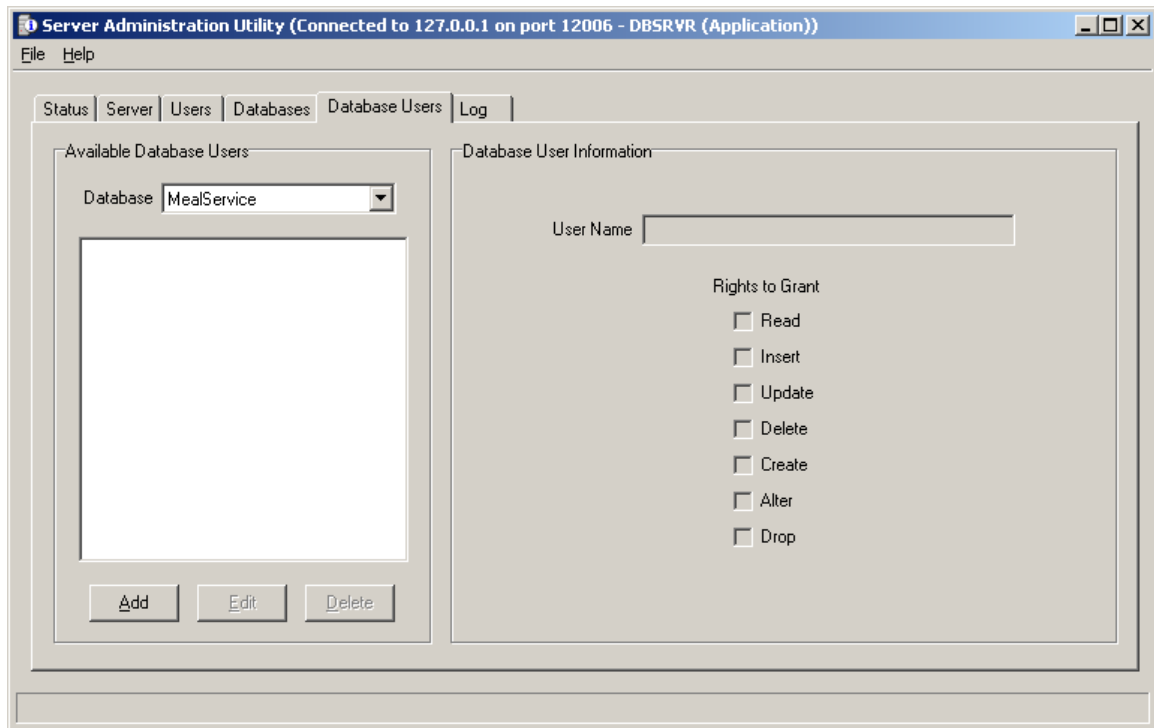


Illustration 223: Server Administration Utility, Database Users tab

In the **Database** drop-down list, select the **MealService** database. Then click the **Add** button to add available users to the database.

In the **User Name** drop-down list, select the **sysadmin** user.

Make certain that every one of the **Rights to Grant** checkboxes has a checkmark in it.

Click the **Save** button.

7. You may now close the Server Administration Utility by selecting **File | Exit** from the menu.
8. The last step is to configure MealService to connect to the Client-Server engine. To do so, launch the Database Administrator and configure it appropriately. See the Database Administrator section for instructions on configuring it for a Client-Server connection.

NOTE: Users with both types of connections (File-Sharing and Remote Client-Server) can concurrently connect to the MealService database.

See Also

Database Administrator (dbAdmin.exe), Page 191

Backing up the data

The simplest solution is to simply back up the entire directory in which the MealService data resides. Within that directory, the files to back up are those with *.dat, *.idx, *.blb, and *.rtm extensions. And of those, the most critical to back up are the *.dat and *.blb files. (The *.idx files are indexes, the *.rtm files are reports, both of which can be recreated if necessary. It's virtually impossible to recreate the data files).

In order to ensure that all files have been released and are free to be copied, all MealService users should exit the program and make certain that any instances of MealService have been properly shut down.

Networking MealService (sharing one copy of the data among multiple computers)

It is a simple matter to share MealService data among multiple computers, as long as those computers can “talk” to each other. You can verify that your computers are networked by using Windows’ *My Network Places* or *Network Neighborhood* to browse the workgroup computers. If the computer on which you wish

to share the data is visible, then your computers are networked. If no computers are visible (other than your own), then the first step is to create a network. That task is beyond the scope of this manual, but the Microsoft Windows help file includes very good instructions on creating a small network. In Windows XP, search for “Home and Small Office Networking”. In earlier versions of Windows try searching on “Networking” or “Networks”. If your machines are networked, then the next step is to make sure the data folder is *Shared* so that other users can access it. On the computer that houses the MealService data, using Windows Explorer or My Computer locate the MealService data folder, then right-click on the folder and select “Sharing” or “Sharing and Security” from the pop-up context menu. Follow the instructions for making the folder visible on the network. When finished sharing the folder, go to another computer on the network and see if you can locate the folder using *Network Neighborhood*. If the MealService folder can now be seen, then MealService will be able to use the data. The final step is to run the Database Administrator (on each machine that needs access to the shared data) and under *Database Location* navigate to, and select, the shared MealService data folder. Click **OK** and close the Database Administrator. At this point all the computers will be using the same, shared, copy of the data.

See Also

Database Administrator (dbAdmin.exe), Page 191

Moving the Data Files to a New Location

The process required to move the data depends upon the connection method. The connection method for each user is determined by the **Operation Mode** setting in the **Database Administrator**. The **Database Administrator** (which, if the installation was created using the MealService CD) is accessed via the **Programs | MealService** menu group on the Windows **Start** Menu. In every case, all users must have closed all running copies of MealService before the data can be moved.

➤**TIP**➤ This operation requires that all users have exited MealService. Before you start, verify that no one is running MealService!

If the **Operation Mode** is set to **File Server**, then the connection is made via file sharing:

To move your data to a new location, simply copy *all* of the files in the data directory (which is determined by the **Database Location** entry in the **Database Administrator**) and paste them into the new data location. Then launch the **Database Administrator** on *every* MealService user’s computer and change the **Database Location** to that of the new data directory.

If the **Operation Mode** is set to **Client-Server Engine**, then the connection is being made via Client Server:

This operation requires using both the **Database Administrator** and the **Server Administration Utility**.

First, login to the **Server Administration Utility**. To do so, select **File | Login to Server** from the menu. The **Remote Login** dialogue will be displayed. At the **User Name** prompt type `sysadmin` (assuming that MealService had been installed and the `sysadmin` user created) and at the **Password** prompt type `sysadmin`. Once all users have logged out of MealService, the next step would be to stop the client-server engine. MealService users are displayed on the **Status** tab of the Server Administration Utility, and the user name is listed as `sysadmin`. If there are no users listed, it is safe to stop the engine. On the **Status** tab click the **Stop** button, which will stop the engine. The next step would be to move the entire contents of the existing data directory. To determine the current data directory, select the **Databases** tab. In the list of **Available Databases** select the **MealService** entry. The edit field labeled **Directory** will then display the location of the MealService data. Using Windows Explorer, select or create the new location of the data, and move the entire contents of the current directory to it. The client-server engine now needs to be told where the MealService data resides. In the **Server Administration Utility** select the **Databases** tab. In the list of **Available Databases** select the **MealService** entry and then click the **Edit** button. The **Select** button will become enabled. Click the **Select** button, and in the resulting **Browse for Folder** dialogue, navigate to and select the new location of the MealService data. Click **OK** to close the dialogue. Then click the **Save** button to apply your changes. Finally, select the **Status** tab, and click the **Start** button to restart the engine.

The **Server Administration Utility** can now be closed by selecting **File | Exit** from the menu.

The last step is to launch the **Database Administrator** on *every* MealService user's computer and change the **Shared Ini Directory** to that of the new data directory.

Repairing a table

Tables can get damaged if a workstation is unexpectedly turned off while processing data or while a record was in active edit mode. If an error message indicating data corruption is received, for example, DBISAM_FILECORRUPT (8962) or DBISAM_INDEXCORRUPT (8965), it is necessary that, at a minimum, the affected table be repaired. It may be a good idea to repair all of the tables at that time, however. (It can do no harm to repair a table, and the repair process may find other tables with problems.)

Tables are repaired using the DBSys (or Database System Utility) application. If MealService was installed using the installation CD then the Database System Utility is launched from the **Programs | MealService** Group on the Windows **Start** menu. Otherwise this program is available on the installation CD.

NOTE: all users must exit MealService before a repair can be undertaken.

To launch the Repair module, select **Utilities | Repair** from the Database System Utility menu. A dialogue similar to the following will be generated:

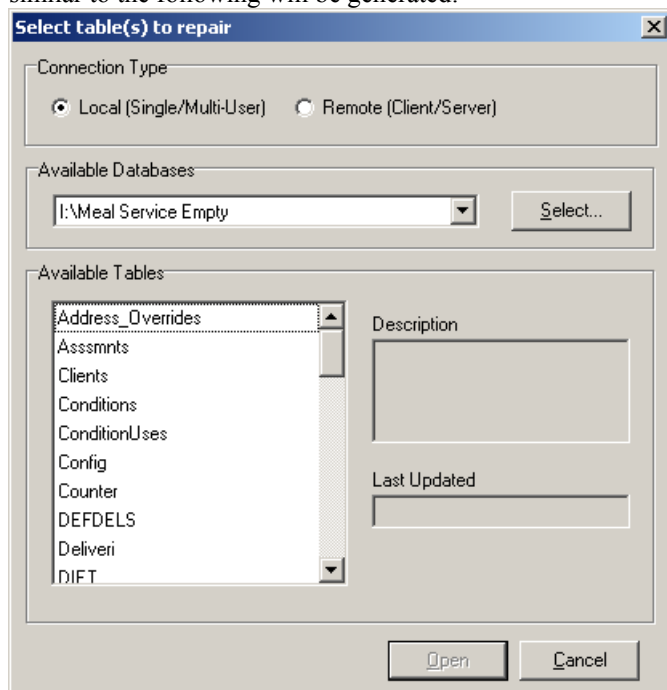


Illustration 224: DBSys Select Table(s) to Repair dialogue

Connection Type: Unless you have purchased the Client-Server version of MealService, select **Local** (Single/Multi User). If you have the Client-Server version of MealService, you may select **Remote** (Client/Server). If you do so, you will be prompted to log-into the Server. In the **Remote Login** dialogue, enter sysadmin at the **User Name** prompt and sysadmin at the **Password** prompt.

Available Databases: if the path shown under **Available Databases** is not the current location of the MealService data, click on the **Select** button and in the resulting dialogue navigate to, and select, the correct location.

Available Tables: This list-box will list all of the tables in the chosen database. Select the necessary table by clicking on it, and then by clicking **Open**. To select all of the tables: click on the first table in the list, hold down the *Shift* key on your keyboard, and then click on the last table in the list.

Clicking **Open** will launch the repair process. The status of the repair can be monitored using the status panes on the bottom of the window. Very large tables can take up to an hour to repair... **DO NOT interrupt the process!** Once the process is completed you will be presented with an Information box stating that the repair has been completed. Clicking **OK** will then result in a status box with two buttons: **Save Log to Disk** and **Close**. Unless you have been instructed to, there is no need to save the log. Simply click the **Close** button to close the window.

NOTE: A table being repaired cannot be in use by any other users at the same time. Typically the only way to guarantee that a table is not in use is to ensure that all users have exited MealService. If the table is in use when attempting a repair, DBSys will display the following error: *DBISAM Engine Error # 11013: Access denied to table 'TableName.DAT'*

See Also

Database System Utility (DBSys.exe), Page 193

Executable Files

MLSvc.exe	The MealService program itself
UserMaintenance.exe	User Maintenance Utility
dbAdmin.exe	Database Administrator. Used to create the registry entry so that MealService knows where to locate its data files.
DBSys.exe	Database System Utility
CS2.exe	CodeSite Diagnostic Utility
DBSrvr.exe	Optional client-server engine
SrvAdmin.exe	Optional client-server engine administrator

Avery Labels used by Delivery Reports

The labels included with MealService, at the time of installation, use the following label formats. Many organizations customize their labels, and therefore they may not conform to the following specifications. If your organization has modified its labels, you might want to modify the following table, as needed.

	United States Canada	United Kingdom and other A4 locations
Daily Labels	Avery 5162 Avery 5262 1.333" x 4" 7 x 2 labels per page	Avery L7163 1.5" x 3.9" 7 x 2 labels per page
Daily Labels with Preferences	Avery 5164 3.333" x 4" 3 x 2 labels per page	Avery L7166 3.67" x 3.9" 3 x 2 labels per page
Daily Labels with Addresses	Avery 5163 Avery 5263 2" x 4" 5 x 2 labels per page	Avery L7173 2.24" x 3.9" 5 x 2 labels per page

Plug-Ins

Plug-ins are optional MealService modules that offer additional or customized, site-specific functionality. Plug-ins use a naming convention where the file name begins with plg and has a file extension of bpl. The Plug-in files must be located in the same directory as that of the MealService executable (mlsvc.exe). Plug-ins currently available include:

- **BillMaker** – this plug-in makes Accounts Receivable functionality available to MealService. Both Clients and Funders can be invoiced for their relevant deliveries. Invoices and monthly statements can be easily generated, as well as Aged Receivables reports.
- **MenuMaker** – this plug-in enables the storage of daily menus, for each service and cuisine type. It also allows the entry of substitute menu items for each affected diet. Using this information, detailed reports can be prepared indicating the exact number required for each menu component (and component substitution).
- **ListMaker** – this plug-in allows the creation of arbitrary lists of clients. Once a list has been created, Clients can be added to it arbitrarily, all Clients on a service can be added to a list, or the Clients scheduled for a delivery on a given day can be added to the list (by using the **Save As** option on the Prepare Deliveries screen). The list can then be used to schedule deliveries to the members. For example, a list might be created to manage those Clients who have been scheduled to receive a special holiday meal.
- **ReferralTracker** – this plug-in facilitates Client referrals, where one Client could refer multiple friends or colleagues to the service. For those organizations that offer referral incentives, this plug-in can be used to track those clients that are due for compensation.
- **VolunteerKeeper** – This plug-in allows sophisticated volunteer scheduling and tracking. Details such as preferred task, preferred delivery route, competencies, and other relevant data points are easily tracked, and then used to schedule volunteers for almost any task in the organization.

Data Dictionary

MealService is a database application utilizing a proprietary data format known as DBISAM. DBISAM has been chosen for its reliability, low maintenance, and ease of installation. Unlike some database systems, each table in the database is stored as a separate file, and each table usually has two supporting files: an index file (*.idx) and a blob file (*.blb).

This is the list of tables, current as of December 31, 2004. See separate appendixes for the respective table structures. Tables marked with † have translations for one or more fields that rely on *codes*, immediately after the list of tables.

MealService

Address_Overrides.dat	Temporary client addresses by day of week or delivery date
Alert_Recipients.dat	Recipients of Alerts and Follow-Ups
Alerts.dat	Pop-up notices with vital Client information
Achived_Deliveries.dat	Archived Deliveries
Archived_Events.dat	Archived Events
Archived_MealCrdt.dat	Archived delivered meal items
Archived_Suspends.dat	Archived Client suspensions
Asssmnts.dat	Health assessments
Client_Diseases.dat	The diseases suffered by each Client
Clients.dat †	Client name, address, demographic and service data
Cold_Bag_Codes.dat	Cold Bag codes
Cold_Bag_Usage.dat	Cold Bag codes affiliated with Diet codes
Conditions.dat	Application conditions, regardless of service
ConditionUses.dat	Application conditions, by client application
Config.dat	Application defaults and configuration data
Counter.dat	System table for internal use by the application
Cuisines.dat	Cuisines
Defdels.dat	Default delivery items defined by service and/or client
Deliveri.dat †	Historical delivery data
Diet.dat	Diet restrictions and associated codes
Diseases.dat	Diseases
Docs.dat	Application documents, regardless of service
DocUses.dat	Application documents, by client
EpisodicDeliveries.dat	Scheduled and Episodic Deliveries
Eventcds.dat	Event types and associated codes
Events.dat	Events generated by deliveries or counseling sessions
FundSrcs.dat	Funding sources and associated codes
FundUses.dat †	Funding sources as assigned to clients by service
History.dat	Archival storage of status changes, missed meals, etc.
Household_Members.dat	Household Members and their roles
Households.dat	Households
Idnos.dat	System table for internal use by the application
Individuals.dat	Individual (non-client) names and addresses
Items.dat	Fundamental delivery and meal items
License.dat	System table for internal use by the application
Locatns.dat	Counseling locations
Martst.dat	Marital status and associated codes
MealCrdt.dat	Meal credits for all deliveries
Notes.dat	Notes on clients and follow-up reminders
Pricing.dat †	Reimbursement rates by item
Queries.dat	System and user-defined queries
Race.dat	Race categories and associated codes
Rbfield.dat	System table for internal use by the application
Rbfolder.dat	System table for internal use by the application

Rbitem.dat	System table for internal use by the application
Rbjoin.dat	System table for internal use by the application
Rbtable.dat	System table for internal use by the application
Relationships.dat	Relationships between clients and other individuals
Routes.dat	Delivery routes and associated codes
ServiceApps.dat †	Applications to the agency by client
ServiceConditions.dat	Application conditions assigned by service
ServiceDocs.dat	Application documents assigned by service
Services.dat †	Agency services
Special_Diets.dat	Clients' Specific Special Diets, by date
Special_Meals.dat	Special meals by date
Staff.dat	Users and staff members
StopReasons.dat	Stop reasons and associated codes
Suspends.dat	Suspensions of service
Zips.dat	ZIP codes (only used when configured for the United States)

Drop-Down List code translations

Drop-Down List Entry Code

Client Status

Table: Clients, Field: Status

Active	A
Stopped.....	S
Inactive.....	I
Not Yet Started.....	N
Wait Listed	W

Primary Phone Description

Table: Clients, Field: Phone_Desc

Primary	P
Cell Phone	C
Mother's Phone.....	M
Father's Phone	F
Sister's Phone.....	S
Brother's Phone	B
Daughter's Phone.....	D
Son's Phone	N
Grandparent's Phone.....	G
Friend's Phone	R
Other Phone.....	O
No Phone.....	X

Gender

Table: Clients, Field: Sex

Male.....	M
Female	F
Transgender.....	T
Refused to Report.....	R
Unknown.....	U

Language

Table: Clients, Field: Language

English.....	E
Spanish	S
French.....	F
Polish.....	P
Russian	R

German	G
Italian.....	I
Chinese (Cantonese).....	C
Chinese (Mandarin).....	M
Korean	K
Japanese.....	J
Portuguese	B
Haitian Creole.....	H
Crioulo.....	V
Other.....	O

Income Category

Table: Clients, Field: Income_Category

If set to Above/Below

Above	A
Below	B

If set to Range 1-10

Range 1.....	1
Range 2.....	2
Range 3.....	3
Range 4.....	4
Range 5.....	5
Range 6.....	6
Range 7.....	7
Range 8.....	8
Range 9.....	9

If set to Low/Medium/High

Low	L
Medium	M
High.....	H

Frame Size

Table: Clients, Field: Frame_Size

Small.....	S
Medium	M
Large.....	L

HIV Status

Table: Clients, Field: HIV_Status

HIV+, not AIDS	1
HIV+, AIDS status unknown	2
CDC-defined AIDS	3
Pediatric AIDS	5
HIV Negative	4
Unknown	9

Delivery Schedule Type

Table: Services, Field: Default_Frequency

Table: Clients, Field: Delivery_Type

Table: Deliveri, Field: the first character in Delivery_Type

Ongoing:.....	O
Episodic.....	E

Delivery Type

Table: Services, Field: Default_Delivery_Type

Table: Deliveri, Field: the second character in Delivery_Type

Delivered	D
Walk-In	W

Application Status

Table: ServiceApps, Field: App_Status

In Process	I
Pending.....	P
Accepted.....	A
Denied	D
Cancelled.....	C

Funding Period

Table: FundUses, Field: Reimbursement_Period

Day	D
Month	M
Year	Y

Funding, Reimbursement Rates Per Item (in addition to agency-defined items)

The following applies when the Method field contains 'F' in the Pricing Table

Table: Pricing, Field: Unit

Breakfasts	B
Lunches	L
Dinners	D
Snacks.....	S
Other.....	O
Medical Food.....	MF
Specialized Medical Food	SM

Funding, Reimbursement Method

Table: FundUses, Field: Reimbursement_Method

Time Period	T
Meals or Meal Items	I

Pledge is Calculated By

Table: Clients, Field: Pledge_Method

Time Period	T
Meals or Meal Items	I

Pledge Items (in addition to agency-defined items)

The following applies when the Method field contains 'P' in the Pricing Table

Table: Pricing, Field: Unit

Breakfasts Category	B
Lunches Category.....	L
Dinners Category.....	D
Snacks Category	S
Other Category	O
Medical Food Category	MF
Specialized Medical Food Category.....	SM

Optional Plug-In modules use the following additional tables**BillMaker**

ArInv.dat	Invoice headers
ArInvCtl.dat	Invoice Number control file
ArInvDet.dat	Invoice line items
ArInvPmt.dat	Payments as allocated to Invoices
ArPmt.dat	Payment and check information
ArPmtCtl.dat	Payment Number control file
Bank.dat	Bank account and associated General Ledger account
CBalance.dat	Current Client balance
Company.dat	Organization and fiscal year configuration

Customer.dat	Clients, funders, and any other invoice recipients (this file is populated by synchronizing with Clients.dat and FundSrcs.dat)
CusType.dat	Customer types
GLAcct.dat	General Ledger chart of accounts
Item.dat	Invoice line items (this file is populated by synchronizing with Items.dat)
ItemCtl.dat	Item Number control file
ItemType.dat	Item type, maps to the meal categories
Logo.dat	Stores a bitmap logo for use on Invoices
Salesman.dat	Salesmen
Tax.dat	Taxes that can be applied to Invoice line items
Warehse.dat	Warehouse and inventory locations

ListMaker

List_Members.dat	Members of lists
Lists.dat	Lists

MenuMaker

Client_Menus.dat	Menu items used by Clients
Components.dat	Meal components
Cycles.dat	Cycles
Item_Components.dat	Meal components mapped to specific Items
Menu_Component_Usage.dat	Components used by specific Menus
Menu_Usage.dat	Menu usage by date
Menus.dat	Menus
Seasons.dat	Seasons
Selections.dat	Menu selections

VolunteerKeeper

Departments.dat	Departments
Driver_Route_Pref.dat	Driver route preferences
Projects.dat	Projects to which volunteers can be assigned
Route_Drivers.dat	Drivers assigned to specific routes
Skills.dat	Skills available to volunteers
Volunteer_Availability.dat	Time availability by Client
Volunteer_Skills.dat	Skills possessed by each volunteer
Volunteers.dat	Volunteer data (in addition to that stored in the Clients table)

ReferralTracker

Affiliations.dat	Affiliations among and between Clients
------------------	--

File Extensions created by MealService

The following file extensions are used and/or created by MealService:

*.dat	Data files
*.idx	Index files
*.blb	Memo files
*.rtm	Report files
*.ini	Configuration files
*.sql	Saved queries from the Database System Utility (DBSys.exe) query tool
*.spq	Queries built and saved in the integrated Query Builder.
*.flt	Filters built and saved in the Intelligent Browse.

The following are residue from restructurings, upgrades, and repairs. They can be safely deleted once it's ascertained that the system is operating normally.

*.dbk	Backup of a data file, created when a file's structure is modified.
*BeforeUpdate.dat	Backup of a data file, created when a file's structure is modified.

*.ibk	Backup of an index file, created when an index is modified.
*.bbk	Backup of a memo file, created when a data file is modified.
*.dup	Backup of a data file, created when the system upgrades its data to a new version
*.iup	Backup of an index file, created when the system upgrades its data to a new version
*.bup	Backup of a memo file, created when the system upgrades its data to a new version

The following files are temporary files that are deleted when the process terminates normally. If the process that created the files is interrupted for some reason, these will be left behind, and can be deleted as indicated:

- Numerically-named files such as *83301.dat*, *83301.idx* or *83301.blb* are MealService temporary files. Any that remain after all users have exited MealService and/or DBSys can be safely deleted.
- Data files named with a user name followed by a modifier and a 14-digit number (*susanSpecLabels63226939770294.dat*, *.idx*, or *.blb*) are also temporary files and can be safely deleted when all users have exited MealService.
- Files named *dsntemp*.dat*, *.idx*, or *.blb* (such as *dsntemp.20040910_123_112.dat*) are created as part of an upgrade process. They can be safely deleted if MealService is functioning as normal.

Minimum System Requirements

The MealService client requires:

- 150 MHz Pentium PC or better. MealService can be run on slower machines, but its performance may not be satisfactory.
- Windows 95 or 98, Windows Millennium, Windows NT 4.0 (with SP3 or later), Windows 2000 or Windows XP.
- 128 megabytes of RAM
- 20 megabytes of hard drive space for MealService and its utilities. Depending upon the number of clients and the frequency of deliveries, the data files can generate approximately 150-180 megabytes of data per year, on the high end.
- A screen resolution of 600 x 800 or greater. Windows Display Settings should be set to Normal or Small Fonts.

The client-server engine utilized by MealService requires the following:

- Windows NT, Windows 2000, or Windows XP. The server can be installed as a service, but it is not a requirement that it be run as a service. Because it does not need to run as a service, the engine can be installed, *if absolutely required*, on Windows 98.
- 256Mb RAM
- an 800MHz, or faster, processor

This configuration will allow the server to run and support a fair number of users, however whether it will be fast enough is a site-specific specific issue (due to the speed of the LAN, the number of users, etc.)

This page intentionally blank.

Sample Reports and Output

This page intentionally blank.

Contact Information

Philip Frank
MealService Software
2100 Pemberton Street
Philadelphia, PA 19146-1221
+1 267-992-0795
Info@MealServiceSoftware.com
<http://www.MealServiceSoftware.com>

All products mentioned herein are copyrighted, trademarks or registered trademarks of their respective manufacturers or holders.

This page intentionally blank.

Index

- *
- *.bbk, 213
- *.blb, 203, 208, 212
- *.bup, 213
- *.dat, 203, 212
- *.dbk, 212
- *.dup, 213
- *.flt, 212
- *.ibk, 213
- *.idx, 203, 208, 212
- *.ini, 212
- *.iup, 213
- *.rtm, 203, 212
- *.spq, 212
- *.sql, 212
- A**
- A4, 140, 207
- About this Guide, 7
- Accepted, 51
- Access Level, 13, 14
 - Full Read/Write, 13
 - Read Only, 13
 - Reports Only, 14
- Accounting
 - Billed Party, 28
 - Default Charge, 29
 - System, 28
- Activating a New Client, 5, 48, 97
- Activation Wizard, 97, 98, 99, 100, 101, 102
- Active, 14, 48, 86, 97, 131, 134, 165, 168, 169, 172
- Active Client Demographics, 146
- Add
 - Address, 73
 - Application, 51
 - Assessment, 81
 - Client, 88, 95
 - Client Pop-Up, 92, 187, 189
 - Condition, 34
 - Consultation, 82
 - Date, 123
 - Delivery, 74, 77
 - Disease, 81
 - Document, 34
 - Follow-Up, 132
 - Individual, 61
 - Item, 35, 66, 75, 78, 125
 - Item Rate, 69
 - Member, 105, 111
 - New Client, 88, 97, 189
 - New Name, 96
 - New Person, 88, 95, 187
 - Note, 89
 - Pledge Item, 70
 - Recipient, 91, 133
 - Relationship, 57
 - Selected Date, 125
 - Service Funding, 67
 - Suspension, 78
 - Table, 147
- Add Person to, 104, 111
- Add/Edit Deliveries, 76
- Adding a new name, 88, 95
- Address
 - Add, 73
 - Alternate, 36, 110, 117, 120
 - Cross Street, 78
 - Delete, 73
 - Description, 21
 - Duplicate, 73
 - Locate, 73
 - Override, 21, 42, 71, 72, 73
 - Override Type, 72
 - Overrides, 21, 72, 187
- Address Override
 - Day of the Week, 73
 - Description, 72
 - Ongoing Day of the Week, 73
 - Precedence, 73
 - Single Delivery Date, 73
 - Temporary Address, 73
 - Type, 72
- Adobe PDF
 - Exporting Report to, 143
- Advance Preparation Days, 41
- Affected, 96
- Agency Reports, 145, 188
- Alert Date/Time, 91, 134
- Alerts, 5, 91, 130, 131, 132, 134, 144, 145, 187, 188, 189, 208
- Alerts and Follow-Ups, 91, 130, 132, 187, 208
- Alerts/Follow-Up Reports, 132, 144, 145, 188
- All Due Dates, 145
- All Individuals, 56, 61
- All on this Client, 88, 187
- All Users, 145
- Allow Alternate Addresses, 36
- Alt+1, 9
- Alt+A, 189
- Alt+B, 189
- Alt+C, 9
- Alt+F, 189
- Alt+H, 103, 189

- Alt+I, 189
- Alt+L, 189
- Alt+M, 105, 189
- Alt+N, 9, 189
- Alt+O, 9, 189
- Alt+P, 9, 187, 189
- Alt+S, 94
- Alt+Tab, 181
- Alt+X, 189
- Alternate Address
 - Allow, 36
- Alternate Addresses, 36, 110
- Alternate Routes, 71
- Amount, 45, 69, 70
- Anti-Virus Software, 199
- Any diet restriction, 122, 123, 142
- Application
 - Add, 51
 - Checklist, 52
 - Comments, 51
 - Condition Comments, 52
 - Condition Name, 52
 - Conditions, 17, 34
 - Delete, 52
 - Denial Reasons, 44
 - Document Comments, 51
 - Documents, 17, 33, 51
 - for Service, 23
 - Intake Conditions, 23, 34
 - Intake Documents, 23, 33, 44
- Application Defaults, 36, 83, 177, 183
- Application Defaults tab, 14, 16
- Application Status
 - Code Translations, 211
- Apply Route Changes, 118
- Archive, 173, 188
 - Action, 173
 - Archive, 173
 - Earliest Date, 173
 - Files, 173
 - Last Date, 173
 - Records, 173, 188
 - Restore, 173
 - Tables, 173
- Archiving Records, 172
- Assessment
 - Add, 81
 - Delete, 81
 - Edit, 81
- Assessments
 - Health, 80, 81
 - Nutrition, 80, 81
- Auto-Create, 114, 115, 116
- Auto-executing Queries, 22, 38
 - Configuring, 183
- AutoRoute, 28, 178

- Auto-Schedule, 75, 78, 114
- Avery Labels, 6, 140, 143, 207

B

- Backing up the data, 203
- Bag Code, 24
- Billed Party, 28
- Bill-To Address, 138
- Biographic Info tab, 15, 17, 18, 28, 29, 30, 39, 52, 53, 81, 103
- Blizzard Bags, 5, 119, 125
- BPL, 199
- Browse, 4, 72, 85, 95, 130, 131, 187, 189, 204
- Browse Alerts, 130, 131
- Browse View, 85

C

- Canada, 37, 50, 178, 182, 207
- Cancelled, 51
- Carbon Copy, 91, 131, 132, 133
- Caregiver, 96
- CareWare, 146
- Category, 36, 89, 90, 93, 133
- Certification Conditions, 187
- Chart
 - Options, 160
 - Print, 161
 - Services to Include, 160
- Charts, 159, 188
- Clear
 - All, 66
 - Day, 75, 78
- Client
 - Invoices, 136
 - Pledges, 137
- Client Count, 140, 146
- Client Diseases, 79, 80, 81
- Client Documents, 23, 24, 34, 51, 187
- Client ID, 48, 96
- Client Identification Number, 48
- Client Lookup, 107, 111, 133, 171
- Client Notes, 37, 89, 93
 - Allow Re-editing, 37
- Client Pop-Up
 - Add, 92, 187, 189
 - Delete, 92, 187
 - Edit, 92, 187, 189
- Client Pop-Ups, 91, 92, 187
- Client Services, 34, 39, 44
- Client Services tab, 16, 17, 33, 34, 35, 39, 47, 50, 51, 59, 169
- Client Status, 145
 - Code Translations, 209
- Clients by Selected Diet, 146, 188
- Clients Listing, 146, 188

- Client-Server Engine, 12, 13, 191, 192, 204
 - Configuring, 199
 - Databases, 202
 - Default MealService User, 202
 - Default User, 200
 - Executable, 199, 207
 - Installing, 200
 - Installing as Service, 200
 - IP Address, 13, 192, 193, 200
 - MealService Database, 202
 - Requirements, 213
 - Server Administrator, 207
- Client-Specific Relationships, 56, 57
- Clipboard, 94
- Codes
 - Translations, 209
- CodeSite, 197, 207
 - log file, 197
- Cold Bag
 - Code, 24, 25, 26, 64, 99
 - Codes, 23, 24, 26, 187
 - Diet Combinations, 25
 - Look Up Code, 99
 - Select, 24, 99
 - Usage, 23, 24, 25, 187
- Cold Bags, 29
- Comments, 23, 24, 26, 27, 28, 29, 30, 31, 32, 33, 36, 39, 40, 42, 44, 45, 51, 52, 81, 82
- Comped, 128, 129, 130
- Component Visibility, 15, 37
- Component Visibility Tree, 14, 15, 37
 - Repopulate, 15, 37
- Condition, 23, 34
 - Add, 34
 - Delete, 35
 - Name, 52
 - One of Several, 23, 24
 - Required, 24
 - Wildcard, 23, 24
- Conditions, 23, 35, 51, 52, 127, 163, 187, 188
 - for Certification, 23
- Configuration, 187
 - Screen, 3, 14, 36
- Confirmation Required, 30
- Congregate, 30, 119, 120
- Conserve Windows Resources, 45
- Consolidate, 185
 - Clients, 184, 188
 - Duplicates, 184, 188
 - Individuals, 184, 188
- Consultation
 - Add, 82
 - Delete, 83
 - Edit, 83
- Consumers, Number of, 83
- Contact Summary, 93, 188
- Context Menu, 8, 15, 37, 43, 51, 52, 61, 66, 73, 78, 81, 118, 126, 129, 130, 131, 134, 139, 140, 166, 168, 204
- Contractual
 - Dates, 45
 - Start, 45, 54
 - Stop, 45, 54
- Control+A, 107
- Control+Alt+C, 189
- Control+Alt+F, 189
- Control+Alt+I, 61, 189
- Control+Alt+N, 94, 189
- Control+Alt+P, 92, 118, 189
- Control+Alt+U, 22, 49, 177, 189
- Control+Alt+V, 127, 188, 189
- Control+C, 189
- Control+D, 81, 88, 121, 166, 187, 189
- Control+Delete, 118, 121, 194, 196
- Control+E, 118, 167
- Control+F, 91, 130, 132, 187, 189
- Control+H, 103, 189
- Control+I, 118, 167, 189
- Control+L, 107, 118
- Control+M, 105, 167, 178, 184, 189
- Control+N, 8, 89, 187, 189
- Control+P, 189
- Control+Q, 174, 188, 189
- Control+R, 107, 118, 166
- Control+S, 9, 118, 167, 189
- Control+U, 81, 166, 184
- Control+V, 189
- Conventions Used, 7
- Copy from Defaults, 75, 78
- Copy from the Defaults, 66, 75
- Copy Name and Address
 - Client, 94
- Copy to Additional Dates, 124
- Copy to Clipboard
 - Client name and address, 189
 - Individual name and address, 189
 - Individual name and address, 61
- Copy ZIPs, 7, 33
- Counseling
 - Event, Default, 42
 - Events, 79, 81, 82, 93
 - Events tab, 82
 - Group Event, 83
 - Location, 28, 82, 83
 - Reports, 31, 143, 144, 188
 - Service, 31
 - Services, 31
 - Session, 31
 - Sessions, 82, 130
- Counseling Events, 82
- Counselor, 83, 144
- Creating a batch of Scheduled or Episodic

- deliveries, 114
- Creating a Filtered Mail-Merge File, 134
- Creating an Alert/Follow-Up, 132
- Credit, 74, 77
- Credit Episodic Events, 120
- Credits
 - Number of, 29, 125
- Cross Street, 78
- CS2.exe, 207
- Cuisine, 26
- Cuisine dialogue, 189
- Cuisine/Track, 26
- Cuisines, 23, 26, 187
- Current User, 145
- Currently Due, 145
- Custom Delivery Items. *See* Set Custom
- Delivery Items
 - Custom Filter, 86, 87, 88, 134, 135, 188, 189
 - Searched Fields, 88
- Custom Mail-Merge, 38

D

- Daily Deliveries, 115, 116, 188
- Daily Run
 - Preparation, 116, 178, 179, 180, 181
 - Reports, 41
 - Sheet, 41, 88
 - Sheets, 139, 140
- Data
 - Backing Up, 203
 - Moving to New Location, 6, 204
 - Sharing, 203
- Data Dictionary, 208
 - ListMaker, 212
 - MenuMaker, 212
 - ReferralTracker, 212
 - VolunteerKeeper, 212
- Database Administrator, 6, 7, 8, 12, 13, 191, 192, 199, 203, 204, 205, 207
 - Database Location, 204
 - Operation Mode, 204
- Database Location, 7, 12, 191, 204
- Database System Utility, 6, 193, 205, 206, 207, 212
- Date Added, 54
- Day of the Week, 72, 73
- Days Stopped, 169
 - To Become Inactive, 169
- DBAdmin.exe, 6, 191, 199, 203, 204
- DBAdmin.exe, 12, 200, 207
- DBISAM, 38, 196, 208
 - Client-Server Engine, 199, 213
 - Database System Utility. *See* Database System Utility
 - DBSrvr.exe. *See* DBSrvr.exe

- DBSys.exe. *See* DBSys.exe
- Error Message, 205
- SrvAdmin.exe. *See* SrvAdmin.exe
- DBSrvr.exe, 199, 200, 207
- DBSys.exe, 6, 193, 194, 195, 196, 199, 205, 206, 207, 212
- Default
 - Charge, 29
 - City, 16
 - City State/ZIP, 40
 - Counseling Event, 42
 - Delivery Days, 11, 32
 - Delivery Items, 11, 23, 35, 41, 125
 - Delivery Type, 11
 - Diet, 40
 - Event, 31
 - Font, 21, 42
 - Frequency, 31, 32
 - Funding Source, 11, 32
 - Requirement Level, 23, 24
 - Route, 11, 49, 101, 108, 118, 165
 - Service, 11, 40, 42
 - Stop, 12
- Delegate, 131, 132
- Delegated To, 91, 133
- Delete
 - Address, 73
 - All Deliveries, 170, 171
 - Application, 52
 - Assessment, 81
 - Client Pop-Up, 92, 187
 - Condition, 35
 - Consultation, 83
 - Current Person, 130, 187
 - Deliveries, 170
 - Delivery, 75, 77, 171
 - Delivery Credits, 170, 188
 - Disease, 81
 - Document, 34
 - Household, 104
 - Individual, 61, 62
 - Item, 36, 66, 70, 75, 78
 - Item Rate, 69
 - Missed Delivery, 56
 - Name, 5, 130
 - Relationship, 61
 - Service Funding, 68
- Delete/Rearrange. *See* Diet Modifications:
- Delete/Rearrange
 - Deleting a Name, 5, 130
 - Deleting Deliveries, 170
 - Deleting/Rearranging Diet Codes, 175
- Delivered, 31, 74, 77, 173
- Deliveries
 - Delete, 170
 - Deleting, 170

- Episodic, 11
- Missed, 171
- Ongoing, 11
- Prepare, 116
- Process, 116
- Recent, 188
- Summarize Missed, 171
- Delivery
 - Add, 74, 77
 - Comped, 128, 129
 - Date, 73, 74, 77, 151
 - Days, Limit to, 116
 - Delete, 75, 77
 - Directions, 73, 88, 187
 - Frequency, 11, 31, 101, 107, 117, 120
 - Migration, 108
 - Reports, 36, 41, 116, 119, 139, 188, 207
 - Reports and Labels, 119, 139, 188
 - Reverse Comped, 129, 130
 - Scheduled, 11
 - Service, 31, 35, 66, 97, 116
 - Services, 20, 31
 - Services Used, 63
 - Type, 11, 31, 97
 - Types, 117
 - Verification, 127
- Delivery Credits
 - Delete, 170
- Delivery Days
 - Default, 11, 32
- Delivery Directions, 42
 - Font Size, 42
- Delivery Items
 - Default, 11, 35
 - Set, 75
- Delivery Reports
 - Line Items, 41
- Delivery Reports Line Items
 - All line items, 41
 - Diet Modifications, 41
 - Modifications from the Default, 41
 - No line items, 41
 - Selected Meals, 41
- Delivery Schedule Type
 - Code Translations, 210
- Delivery Type
 - Code Translations, 210
 - Codes, 210
 - Default, 11
 - Delivered, 31
 - Walk-In, 31
- Delivery/Route Info tab, 21, 49, 97
- Delivery/Route tab, 71, 76
- Demographic Meal Count, 141
- Demographics, 146
- Denied, 51
- Department, 27, 91, 133
- Dependent, 96
- Diet Codes
 - Deleting, 175
 - Rearranging, 175
- Diet Modification, 26
- Diet Modifications, 20, 23, 26, 40, 48, 64, 175, 187
 - Delete/Rearrange, 26
 - Maximum Allowed, 40, 64
- Diet Restrictions, 117, 120
- Digital Metaphors Corporation, 159
- Disease, 27, 81
 - Add, 81
 - Delete, 81
- Diseases, 23, 26, 79, 80, 81, 187
- Display Order, 32
- Distribution Center, 28, 30, 31, 180
- Distribution Centers. See Locations/Distribution Centers
- DLL, 199
- Document
 - Delete, 34
 - Description, 24
 - Name, 24, 51
- Documents, 51, 52
- Drag a column header here, 154, 155
- Driver, 14, 32
- Driving, 30
- Due Dates, 145
- Dupe Monday, 36, 66
- Duplicate Address, 73
- Duplicated Records
 - Consolidating, 184
- Dx Date, 81

E

- Edit
 - Alerts, 91
 - Assessment, 81
 - Client Pop-Up, 92, 187, 189
 - Consultation, 83
 - Date, 123
 - Diet Codes, 175
 - Existing (Name), 96, 97
 - Follow-Up, 189
 - Individual, 61
 - Members, 103, 104
 - Note, 89, 90
 - Notes, 8, 89, 187
 - Queries, 38, 39, 177, 183
 - Relationship, 57
- Edit Alerts and Follow-Ups, 91
- Email, 28, 50, 60
- Emergency Contact, 60

- Enable Mapping, 36
- Enable the ExecuteOnClose Query, 14
- Enable the ExecuteOnOpen Query, 14
- Ending Location
 - Include, 180
- Entire Week, 66
- Episodic, 11, 30, 31, 71, 76, 77, 78, 97, 101, 102, 114, 116, 117, 173, 208
 - Deliveries, 11, 76, 77, 79
 - Events to be Credited, 127
 - Items, 78
 - Only, 117
- Episodic and Scheduled, 117
- Episodic Deliveries
 - Crediting, 119
- Event
 - Group, 83
 - Type, 83
- Event Code, 27
- Event Type, 27
- Event Types, 23, 27, 31, 187
- Excel
 - Export Client Browse Data to, 85
 - Export Delivery Data to, 118
 - Export Intelligent Browse to, 156
 - Export Report to, 143
 - Export Route to, 168
- Exclude these routes, 140
- Exclude Walk-Ins, 170, 171
- Excuse Missed Delivery, 55
- Excused, 55, 171
- Executable Files, 207
- Execute Query, 38, 174, 175, 188, 189
- Execute_On_Close, 38, 183
- Execute_On_Open, 38, 183
- Execute_On_Post, 38, 183
- Export Data, 85, 118, 134, 143, 156, 167
- Export records, 118
- Export to File Name, 180
- Export to MapPoint, 178
- Export to Streets and Trips, 182

F

- File Extensions, 6, 212
- File Location, 51
- File Server, 12, 13, 191, 192, 204
- Filter
 - Custom, 86, 87, 134, 188, 189
 - Status, 85
- Filtered Mail-Merge, 5, 134, 135
- First Contact Date, 172
- First Service Date, 54
- Flag Special Meals, 15, 41, 122
- Follow-Ups, 130
- Frame Size, 80

- Code Translations, 210
- Frequency, 11, 31, 98, 101, 109, 115, 117, 120, 213
 - Select, 98
- Fulfill, 126
- Full Read/Write, 13
- Fund Abbreviation, 27
- Fund ID, 27
- Fund Source, 27
- Funding, 4, 20, 23, 27, 32, 45, 49, 67, 68, 69, 187, 208
 - Invisible, 45
 - Visible, 45
- Funding Period
 - Code Translations, 211
- Funding Source
 - Address, 27
 - Default, 11, 32
 - Limit Clients to One, 68
 - Limit to One, 45, 68
- Funding Sources, 20, 23, 27, 32, 45, 67, 187
- Funding/Billing tab, 27, 45, 67

G

- Gender
 - Code Translations, 209
- Get Map, 83
- Google Maps, 37
- Grocery Pantry, 119
- Group
 - Event, 83

H

- Head, 105, 107, 110, 113
- Head of Household, 113
- Health Assessments, 43, 79, 80, 81, 93
- Health History, 79, 80
- Health History tab, 79
- Health/Nutrition History, 89, 187
- Health/Nutrition tab, 79
- Height, 53, 80
- HIV Status, 80
 - Code Translations, 210
- Hours, 42, 82
- Household, 117, 120
 - Delete, 104
 - Head of, 105, 107, 113
 - Member, 5, 49, 54, 73, 79, 104, 105, 107, 108, 109, 110, 111, 113
 - New, 104
 - Wizard, 111
- Household Member
 - Locate Selected, 107
 - Remove Selected, 107
- Household Members, 102, 103, 105, 106, 107,

- 108, 109, 111, 146, 188, 189, 208
 - Add, 105, 111
 - Lookup, 106
- Household Wizard, 111, 112, 113, 114
- Households, 5, 53, 102, 103, 104, 110, 111, 146, 189
 - Managing, 5, 53, 102
 - Migrate Delivery Information, 108
 - Migrating Delivery Details, 107
- Households Maintenance, 103, 104, 110

I

- Ideal Weight, 81
- Import Data Wizard, 182
- In Process, 51
- Inactivate, 188
 - All, 170
 - Stopped Clients, 48, 169
- Inactivating Stopped Clients, 169
- Inactive, 45, 48, 131, 169, 170
- Include Ending Location, 180
- Include Starting Location, 180
- Include these routes, 140
- Income Categories, 36
- Income Category
 - Code Translations, 210
- Income List, 44
- Income Source, 18
- Increment Stops, 167, 168
- Increment/Decrement stops, 118
- Individual
 - Add, 61
 - Delete, 61, 62
 - Edit, 61
- Individuals Maintenance, 59
- Installing MealService, 7
- Intake Conditions, 17, 34, 44
- Intake Date, 54
- Intake Documents, 17, 33, 44
- Integrate with MapPoint, 181
- Intelligent Browse, 152, 153, 156, 188
 - Client Diseases, 153
 - Custom Filter, 155
 - Drag a column header, 154
 - Filter, 155, 156, 212
 - Grouped Column, 155
- Invoices
 - Bill-To Address, 138
 - Client, 136
 - Starting Number, 138
- IP Address, 13, 192, 193, 200
- Item
 - Add, 35, 66, 75, 78, 125
 - Count, 140, 141
 - Delete, 36, 66, 70, 75, 78

- Item Rate
 - Add, 69
 - Delete, 69
- Items
 - Clear All, 66
- Items other than the default, 122, 143

K

- Kitchen Counts, 141

L

- Label Selection, 140, 141, 142
- Label Selection and Sorting Criteria, 140, 141, 142
- Labels, 40
 - per Item, 29
 - Sorting, 143
- Language
 - Code Translations, 209
- Launch Word, 134, 135
- Limit Notes, 89
- Line Items, 41
 - All line items, 41
 - Diet Modifications, 41
 - Modifications from the Default, 41
 - No line items, 41
 - Selected Meals, 41
- List, 125
- List Fulfillment, 126
- ListMaker, 118, 125, 126, 207, 212
- Locate address, 73
- Locate Dependent's Guardian, 96
- Locate MealService Data folder, 7, 12, 191, 192
- Location, 28, 180, 182, 204
 - Counseling, 28, 82, 83
 - Distribution Center, 28
- Location ID, 28
- Locations, 23
- Locations/Dist Centers, 28, 82, 180, 187
- Locations/Distribution Centers, 28, 30, 31, 140
- Logic
 - MealService, 3, 11
- Look Up Cold Bag Code, 99
- Lookup Household Members, 106

M

- Mailing address, 72
- Mail-Merge, 134, 188
 - Client Invoices, 136, 188
 - Custom, 38, 135, 188
 - Filtered, 134
 - Filtered Clients, 188
- Maintain Episodic Deliveries, 77
- Make Client, 96, 97

- Make Dependent, 96, 97
- Managing
 - Household Members, 105
 - Households, 5, 53, 102, 103
 - Special Meals, 122
- Map tab, 36, 83
- Mapping
 - Action, 180, 181
 - Options, 167, 179, 180, 181
 - URL, 36, 37, 83
 - URLs, 37
- Mapping URLs
 - Google Maps, 37
 - MapQuest, 37
- MapPoint, 5, 28, 36, 118, 119, 167, 168, 178, 180, 181
 - Integrate with, 181
 - Optimize and Retrieve Stops, 180
- MapQuest, 36, 37, 73, 83
- Marital Status, 15, 18, 23, 28, 29, 187
- Match All Selections, 123, 143
- Match Any Selection, 123, 142
- Meal, 29
- Meal Composition, 23, 35
- Meal Item, 29
- Meal Items, 23, 28, 29, 35, 48, 64, 68, 69, 70, 125, 187
- Meal Status, 48
- Meals or Meal Items, 68
- Meals Start Date, 48, 54, 97, 100
- Meals Stop Date, 54
- MealService
 - How it functions, 11
 - Installing, 7
 - Logic, 3, 11
 - Networking, 203
 - Setting Up, 11
 - Shortcut, 197
 - Starting, 8
 - Starting with CodeSite, 197
 - What you Need to Run, 7
- Medical Food, 29
 - Specialized, 29
- Medical Status, 60
- Mental Health DX, 80
- Menu, 88
- MenuMaker, 207, 212
- merge master document, 134, 135
- Migrate Delivery Information, 108
- Migrating Alternate Addresses, 110
- Migrating Delivery Details, 107
- Migrating Suspensions, 109
- Minimum System Requirements, 213
- Missed Deliveries, 171
 - Batch Recording, 163
 - Summarize, 188

- Missed Delivery
 - Batch Recording, 163
 - Delete, 56
 - Excuse, 55
 - Record Individually, 54
- MLSvc.exe, 8, 199, 200, 207
- Mobility Factors, 81
- Modify
 - Routes and Stops, 71
 - Table Structure, 193
- Monthly deliveries, 115
- Move
 - Disease Down, 81
 - Disease Up, 81
 - Down, 166, 168
 - Up, 166, 168
- Moving the Data Files, 6, 204
- Mutually Exclusive, 20, 31

N

- Navigate, 5, 10, 95
- Networking, 203
- New Client
 - Add, 88, 97, 189
- New Household, 104, 110, 112
- New List, 126
- New Name
 - Add, 96
- New Person
 - Add, 88, 95, 187
- New_Client_Demographics, 38
- Not Yet Started, 48
- Note
 - Add, 89
 - Client, 89
 - Edit, 89, 90
- Note Categories, 45
- Notes
 - Edit, 8
- Number of Consumers, 83
- Number of Credits, 29, 125
- Number of Professionals, 83
- Nutrition Assessments, 80
- Nutritional Counselors, 32
- Nutritionist, 14, 32, 82

O

- Ongoing, 11, 30, 31, 32, 42, 71, 72, 73, 76, 78, 79, 97, 101, 117
 - Deliveries, 11
- Ongoing Deliveries, 71, 78, 79
- Operation Mode, 12, 191, 204
- Optimize and Retrieve Stops, 180
- Order Stops by Route, 165, 178, 179, 180
- Organization

- Address, 3, 14, 80
- Defaults, 14, 36
- Name for Reports, 14
- Service Days, 41
- Other Reports, 22, 146, 188
- Other Services, 20, 31, 64
- Over-Due, 145
- Owner, 91, 131, 132, 133

P

- Pantry, 119
- Password, 14, 204
- Pending, 51
- Phone, 16, 27, 37, 47, 49, 50, 60, 73, 93, 180
- Pledge
 - Add Item, 70
 - Amount, 70
 - Delete Item, 70
 - Specific Items, 70
 - Time Period, 70
- Pledge is Calculated By
 - Code Translations, 211
- Pledge Items
 - Code Translations, 211
- Pledged
 - Amount, 45
 - Invisible, 45
 - Visible, 45
- Pledges, 67, 69, 70, 137
- Pledges tab, 69
- Plug-Ins, 125, 199, 207
 - ListMaker. *See* ListMaker
 - MenuMaker. *See* MenuMaker. *See* MenuMaker
 - ReferralTracker. *See* ReferralTracker
 - VolunteerKeeper. *See* VolunteerKeeper
- Populate Grid, 118, 126
- Populate Grid with Previously Saved Deliveries, 118
- Populate_URN, 38
- Pop-Ups. *See* Client Pop-Ups
- Post Deliveries to Events Table, 41
- Post the export to each Client's history?, 134
- Post the merge to each Client's history?, 135
- Postal/Phone Format, 16, 37, 47, 49, 50, 60, 73
- Preferences/Dislikes, 64, 140, 189
- Preferred Tab, 45
- Prepare Deliveries, 116, 117, 126
- Prepare!, 117, 120
- Previously Saved Deliveries, 118, 126
- Primary Phone Description
 - Code Translations, 209
- Print Report, 89, 119, 139
- Print Screen, 88
- Priority, 91, 134

- Process Deliveries, 116
- Professionals, Number of, 83
- Prompt when data is older than, 14

Q

- Quantity, 35, 66, 126
- Queries
 - System. *See* System Queries
- Query Builder, 147, 152, 188, 212
 - Add Tables, 147
 - Database, 148
 - Join Tables, 148
 - Removing Joins, 149
- Quick Clients Listing, 118

R

- Race
 - Code, 30
 - Codes, 18, 23, 30, 187
 - Description, 30
 - ID, 30
- Rank, 81
- Read Only, 13
- Recent Deliveries, 128, 188
- Recertification, 45, 48, 49
 - Weeks until. *See* Weeks until Recertification
- Recipient
 - Add, 91, 133
- Recipients, 90, 91
- Record Missed Deliveries utility, 163
- Record Missed Delivery, 54
- Recording a delivery as Comped, 128
- Recurrence
 - Frequency, 115
- Referral Source, 60
- ReferralTracker, 207, 212
- Refresh Lists, 15, 187
- Region, 33
- Reimbursement method, 28
- Reimbursement Method
 - Code Translations, 211
- Reimbursement Rate
 - Meals or Meal Items, 68
 - Set, 68
 - Time Period, 68
- Reimbursement Rates
 - Code Translations, 211
- Related Clients. *See* Show Related Clients
- Related Individual ID, 59
- Related Individuals Maintenance, 59, 60
- Relationship, 19, 44, 58, 59, 60, 61
 - Add, 57
 - Delete, 61
 - Edit, 57
 - List, 44, 59

- Relationships, 18, 188
 - Client-Specific, 56, 57
 - tab, 56, 57
- Remove Selected, 107
- Remove selected clients deliveries, 118
- Repair, 196, 205
- Repairing a table, 196, 197, 205
- Report Designer, 22, 156, 157, 158, 159, 188
 - Data tab, 158
 - Design tab, 158
 - Preview tab, 159
- Report Explorer, 156, 157
- ReportBuilder, 156, 159
- Reports
 - Agency. See Agency Reports
 - Counseling. See Counseling Reports
 - Other. See Other Reports
- Reports Only, 14
- Request Letters, 52
- Required Condition, 24
- Requirement Level, 34, 35
- Reset
 - First Contact Date, 172, 188
 - Routes, 71, 118, 166, 168
 - Stops, 71, 118, 167, 168
- Responsibility, 91, 133
 - Carbon Copy, 91
 - Delegated To, 91
 - Owner, 91, 133
- Restore, 173
- Restoring Records, 173
- Restructure, 6, 193
- Reverse Comped, 129, 130
- Role, 104, 105, 107, 113
- Route, 4, 21, 30, 47, 48, 49, 71, 73, 74, 76, 77, 97, 101, 102, 107, 117, 118, 120, 140, 141, 165, 166, 178, 179, 180, 181, 182, 188
 - Alternate, 71
 - Default, 11
 - Description, 30
 - ID, 30
 - Order Stops, 165
 - Selection, 139, 140
 - Sheet, 73
 - Type, 30
- Route Planner
 - Streets & Trips, 182
 - Streets & Trips, 182
- Routes, 21, 23, 30, 71, 117, 118, 139, 140, 165, 178, 187
 - Alternate, 71
 - Exclude, 140
 - Include, 140
 - Order Stops, 188
 - Reset, 118

S

- Salutation, 59
- Save As, 118, 125, 168, 207
- Save Data, 119, 122
- Save Route Information, 180
- Scheduled, 4, 5, 11, 30, 42, 64, 73, 74, 75, 78, 79, 114, 116, 117, 127, 173, 208
 - Delivery, 11, 74, 75
 - Only, 117, 127
- Scheduled Deliveries, 64, 73, 74, 75, 78, 79
 - Crediting, 119
 - Delivery Date, 74
 - Delivery Type, 74
 - Specific Items, 74
- Search, 5, 9, 10, 60, 95, 96, 110, 131, 133, 151, 171, 189
- Search For, 104
- Search for a Household, 113
- Search Options, 132
- Searched Fields, 88
- Secondary Conditions, 81
- Select
 - Cold Bag, 24, 99
 - Destination, 140, 144, 146
 - Frequency, 98
 - Routes for Mapping, 180
- Selected
 - Dates, 125
 - Day, 66, 75, 78
 - Diet Restrictions, 122, 123, 142
 - User, 145
- Selected Date
 - Add, 125
- Send to Mapping, 118, 167, 168, 178
- Server Administration Utility, 204
- Server IP Address, 13, 192, 193, 200
- Service, 27, 31, 117, 120
 - Code, 31
 - Default, 11, 40
 - Type, 31
- Service Funding
 - Add, 67
 - Delete, 68
- Service Suspensions tab, 78, 97
- Service Type, 20
- Service/Diet tab, 20, 63, 97
- Services, 17, 18, 19, 20, 23, 27, 31, 33, 35, 39, 40, 42, 44, 47, 51, 52, 64, 67, 139, 146, 169, 187
- Sessions, 42, 82, 93, 130, 144
- Set Assessment Data Visibility, 42
- Set Assessment Data: Order and Visibility, 42
- Set Custom
 - Delivery Items, 8, 64, 65, 99, 100
 - Funding, 67
 - Funding Sources, 67

- Set Delivery Items, 75, 78
- Set Intake Conditions, 44
- Set Intake Documents, 44
- Set Items, 125
- Set Pledge, 70
- Set Reimbursement Rate, 68
- Set Special Meals, 122
- Set Special Meals Qualification, 122
- Set Visible Tabs, 45
- Setting Up MealService, 11
- Shared Ini Directory, 12, 192
- Sharing MealService Data, 203
- ShazamWare, 152
- Shortcut, 197
- Show Column Headings, 52
- Show Related Clients, 61
- Single Delivery Date, 72, 73
- Sort Order, 34, 35, 36, 45, 195
- Special Meal
 - Abbreviation, 41
 - Label, 41
- Special Meals, 15, 16, 41, 122, 123, 142, 187
 - By Date, 123
 - Flag, 15, 41
- Specialized Medical Food, 29
- Specific Items, 70, 74, 77
- Specify a file, 134, 135
- Speed Keys, 189
- SQL Queries, System. *See* System Queries
- SrvAdmin.exe, 200, 207
- Staff, 14
- Staff ID, 32
- Staff Member, 32, 91, 133, 145
- Staff Members, 23, 32, 82, 187
- Standard Diet Label, 40
- Starting Client Demographics, 146
- Starting Location, 180
 - Address, 180
 - City, 180
 - Include, 180
 - Name, 180
 - State, 180
 - ZIP, 180
- Starting MealService, 8
- Status, 4, 29, 47, 48, 51, 53, 54, 56, 79, 85, 86, 87, 88, 91, 97, 107, 108, 128, 131, 134, 135, 145, 146, 168, 169, 171, 172, 188, 189, 204
 - and Non-Delivery Services, 49
 - Bar, 88
 - Filter, 85, 86, 134, 135, 188, 189
- Status History, 188
 - View, 56
- Status/Dates tab, 32, 53, 54, 97, 128, 171
- Status/History tab, 127
- Stop, 12, 117, 120
 - All, 168, 169

- Default, 12
- ID, 32
- Reason, 32
- Reasons, 23, 32, 54, 187
- Stopped, 5, 45, 48, 168, 169, 170, 188
- Streets & Trips, 5, 28, 118, 119, 167, 178, 180, 182
 - Export to, 182
 - Import Data Wizard, 182
 - Region, 182
 - Route Planner, 182
- Subject, 91, 133
- Summarize Missed Deliveries, 171, 188
- Summarizing Missed Deliveries, 171
- Supporting Tables, 23
- Suspended, 49, 79, 86
- Suspension
 - Add, 78
- Suspensions, 4, 48, 78, 79, 97, 107, 188, 209
 - Migrating, 109
- System
 - Defaults, 36
 - History, 92, 188
 - Queries, 22, 37, 38, 135, 174, 183
 - Requirements, 213

T

- Tab
 - Preferred, 45
- Table
 - Maintenance, 14, 16, 17, 18, 19, 20, 21, 22, 23, 24, 26, 27, 28, 29, 30, 31, 32, 33, 34, 35, 36, 51, 52, 122, 125, 175, 177, 183, 187
 - Repairing, 196
 - Restructure, 6, 193
- Tabs
 - Set Visible, 45
- Temporary Address, 72, 73
- This item is
 - frozen, 30
 - served in bulk, 30
- Time Period, 28, 68, 70
- Treat Multiple Deliveries as One, 42

U

- Undo Move, 184
- Unique Identifier, 49
- Unique Record Identifier, 38
- Unique Record Number, 177
- United Kingdom, 9, 37, 50, 178, 182, 207
- United States, 23, 33, 37, 47, 50, 73, 178, 182, 207
- Update On Close, 183
- Update on Open, 183
- Update Stopped Status, 5, 168

URL

- Google Maps, 37
- Mapping. *See* Mapping URL
- MapQuest, 37

URN, 177, 178

- Populate, 189

User

- ID, 13
- Maintenance, 8, 13, 46, 207
- Preferences, 45
- User's Full Name, 13
- User-Defined, 3, 17, 18, 22, 39, 40, 51, 52, 80, 147, 188
 - Reports, 3, 22, 40, 147, 188
- UserMaintenance.exe, 207
- Usual Weight, 81

V

- VCR buttons, 9, 13, 131
- Verify Delivery Conditions, 127, 163, 189
- View
 - Browse, 85
 - Clients, 168, 169
 - Recent Deliveries, 127, 128
 - Status History, 56
 - System History, 92
- View and Print Charts, 159, 188

Visible Fields, 42, 43

Volunteer, 32, 212

VolunteerKeeper, 207, 212

W

- Wait Listed, 48
- Walk-In, 30, 31, 74, 77, 170, 171
 - Visits, 119
 - Crediting, 119
- Walking, 30
- Walk-Ins only, 170, 171
- Weekly Deliveries, 115
- Weeks until Recertification, 45
- Weight
 - Ideal, 81
 - Usual, 81
- Wizard, 53, 97, 111, 182

Y

- You have both Credit Card as well as Housing/Living set to be visible warning, 15

Z

- ZIP Code, 33, 49
- ZIP Codes, 7, 23, 32, 33, 187