



E-Forms

Transition into MI-WIC

E-Forms

Roles

- ▶ The E-Forms role will now be available in MI-WIC as a Local Agency Level Role.
 - ▶ To assign this role, supervisors will need to select the E-Forms LA-Clinic Role and associated clinics on the 'LA Roles' screen.
- ▶ This will be added and maintained as all other MI-WIC roles.

The screenshot displays the 'LA Roles' interface for a staff member named 'Ressler, Kristina - RESSLERK'. The interface is divided into several sections:

- Staff Member:** Ressler, Kristina - RESSLERK (with a 'Go' button)
- Available Roles:** A table with columns for 'Module' and 'Role'. The 'LA-E-Forms Clinics Ordering' role is highlighted in green. A red arrow points to this row.
- Clinics Assigned to Staff:** A list of clinics with checkboxes for selection. The 'LA-E-Forms Clinics Ordering' role is currently assigned to several clinics, including '000000 State Agency', '010101 Alcona County Office', '013502 Iosco County Office', '013505 DHD#2 Home Visitors', '016503 Ogemaw County Office', '016804 Oscoda County Office', and '020251 Munising WIC Clinic'.
- Buttons:** 'Add' and 'Remove' buttons are located at the bottom of the interface.
- Current Roles:** A section at the bottom left, currently empty.

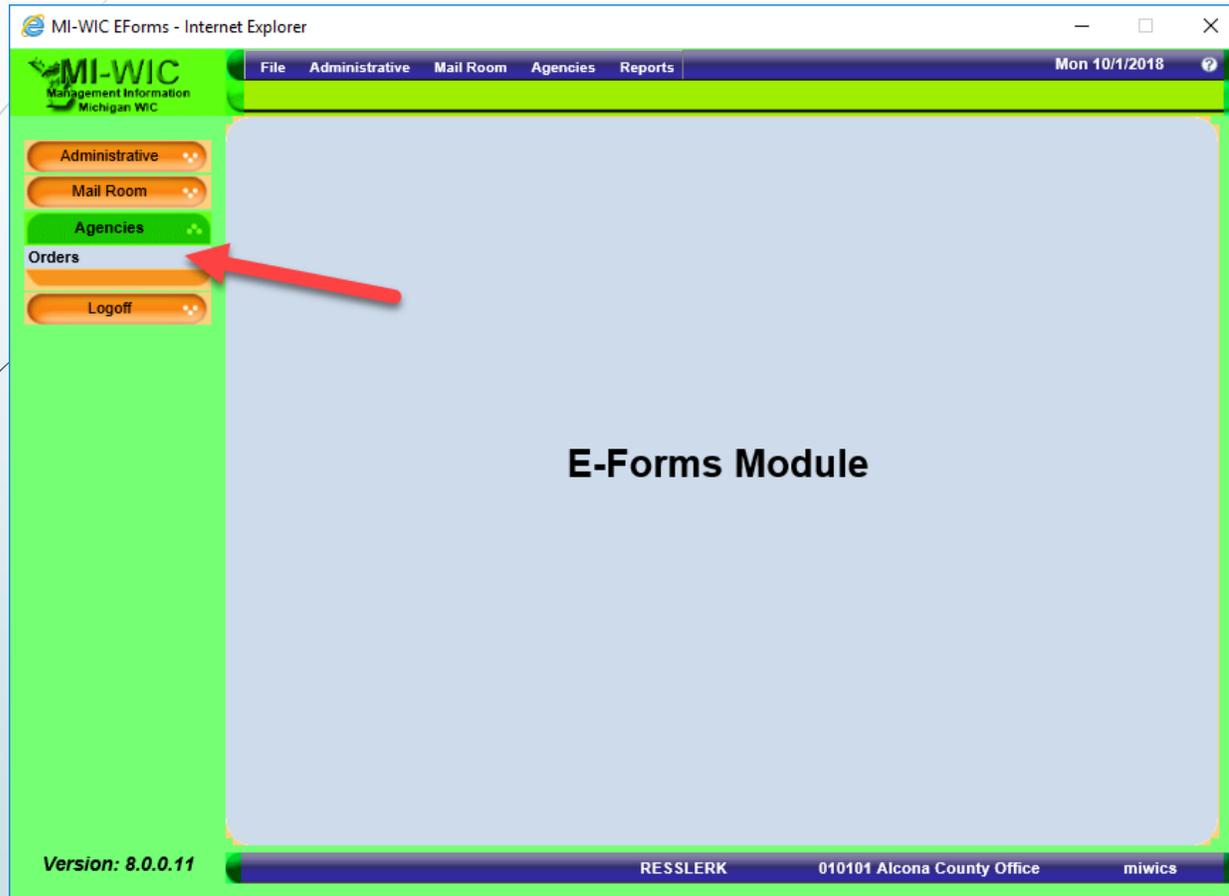
The left sidebar contains navigation options such as 'Scheduling Tasks', 'User Setup', 'User Access Requests', 'Staff Information', 'Use Agencies', 'State Level Roles', 'LA Roles', 'Monitor/Review Roles', 'Agency/Clinic Setup', 'Breast Pumps', 'Time Study', 'Project FRESH', and 'Project FRESH EBT'.

E-Forms

- ▶ To access E-Forms, clinic staff will now select it as an available option on the MI-WIC home screen

The screenshot displays the MI-WIC home screen. At the top left is the MI-WIC logo and the text "Michigan's Management Information for WIC". At the top right is the Michigan Department of Health & Human Services logo and a row of five small photos of children. The main content area is divided into three sections. On the left is a vertical navigation menu with the following items: CLINIC, ADMIN, NUTRITION, VENDOR, SECURITY, and E-FORMS. A red arrow points to the E-FORMS menu item. Below the menu is a notice: "Many documents on this site are PDF files which require the use of the free Adobe Acrobat Reader." followed by the "Get Adobe Reader" logo and the text "APP Server 1". The middle section features a large blue graphic with the MI-WIC logo and a map of Michigan, overlaid with images of a pregnant woman, a woman holding a baby, and a woman at a computer. The right section is titled "WIC Announcements" and contains a large white rectangular area with up and down arrows, set against a background image of a bridge over water. At the bottom of the page is a disclaimer: "Access to this system is restricted to authorized users only and limited to approved business purposes. By using this system, you expressly consent to the monitoring of all activities. Any unauthorized access or use of this system is prohibited and could be subject to criminal and civil penalties. All records, reports, e-mail, software, and other data generated by or residing upon this system are the property of the State of Michigan and may be used by the State of Michigan for any purpose."

E-Forms



- To enter, view or maintain orders, staff will select the 'Agencies' option from the menu.
- From there, they will select 'Orders'

E-Forms

- Once on the order screen, by default, staff will see all forms that have been ordered for the clinic or local agency at which they are logged in

Order Status:

Order #:

Order Created Date Between: and

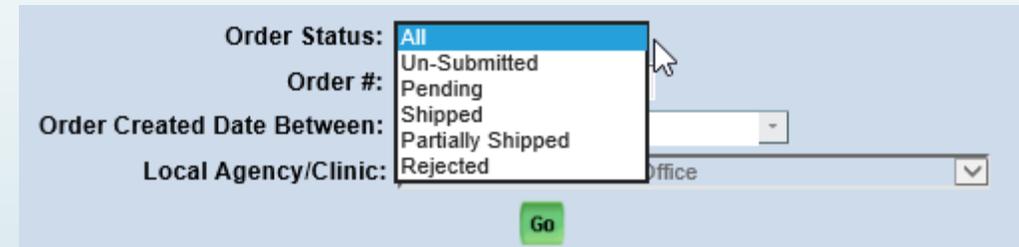
Local Agency/Clinic:

Local Agency/Clinic*	Order...	Form #*	Description*	Quantity Ordered*	Shipping Address*	Quantity Shipped	
010101 Alcona County Office	334	00125	Descrip Change	5			2
010101 Alcona County Office	330	bb	bbb	5	311 Lake St ,Ha...	5	0
010101 Alcona County Office	329	aa	aa	10	311 Lake St ,Ha...	10	3
010101 Alcona County Office	327	0001F3	0001F3	1	6		3
010101 Alcona County Office	306	UATFORM10	UATDESC10	5	111		3
010101 Alcona County Office	232	DCH-125	Forms test-125	10		10	1
010101 Alcona County Office	229	001TESTT	001TESTT	10		10	0
010101 Alcona County Office	225	June123	June123	10		10	1
010101 Alcona County Office	225	June123	June123	10			1
010101 Alcona County Office	225	June123	June123	10			1
010101 Alcona County Office	206	00125	Descrip Change	10			2
010101 Alcona County Office	205	June123	June123	10		10	1
010101 Alcona County Office	170	00125	Descrip Change	15			2
010101 Alcona County Office	170	00125	Descrip Change	15			2

E-Forms

➤ Order Status:

- All
- Un-Submitted
 - Have been saved but not submitted
- Pending
 - Have been submitted but not shipped
- Shipped
- Partially Shipped
- Rejected



A screenshot of a web form interface. The form includes several fields: "Order Status:" with a dropdown menu open showing options "All", "Un-Submitted", "Pending", "Shipped", "Partially Shipped", and "Rejected"; "Order #:" with a text input field; "Order Created Date Between:" with two date input fields; and "Local Agency/Clinic:" with a dropdown menu. A green "Go" button is located below the form fields.

E-Forms

Creating a New Order

- ▶ To add a new form to order, select 'Add' at the bottom of the screen.



The screenshot displays a web application interface for creating a new order. At the top, there are several search filters: 'Order Status' is set to 'Un-Submitted', 'Order #' is empty, 'Order Created Date Between' has two empty date pickers, and 'Local Agency/Clinic' is set to '010101 Alcona County Office'. A green 'Go' button is positioned below these filters. Below the filters is a table with the following columns: 'Local Agency/Clinic*', 'Order #', 'Form #*', 'Description*', 'Quantity Ordered*', 'Shipping Address*', and 'Quantity Shipped'. The table is currently empty, displaying the message 'No Records Exist in Data Source'. At the bottom left of the table area, there are two buttons: 'Add' (highlighted with a red arrow) and 'Remove'. At the bottom right of the interface, there are three buttons: 'Submit', 'Save', and 'Cancel'.

Note: To reduce confusion when creating a new order, select order status 'un-submitted' to see only those forms that have not yet been ordered.

E-Forms

Creating a New Order

- First, select the clinic from the drop-down menu

Order Status: Un-Submitted

Order #:

Order Created Date Between: and

Local Agency/Clinic: 010101 Alcona County Office

Go

Local Agency/Clinic*	Order...	Form #*	Description*	Quantity Ordered*	Shipping Address*	Quantity Shipped	Status
010101 Alcona County Office							

Add Remove

Submit Save Cancel

E-Forms

Creating a New Order

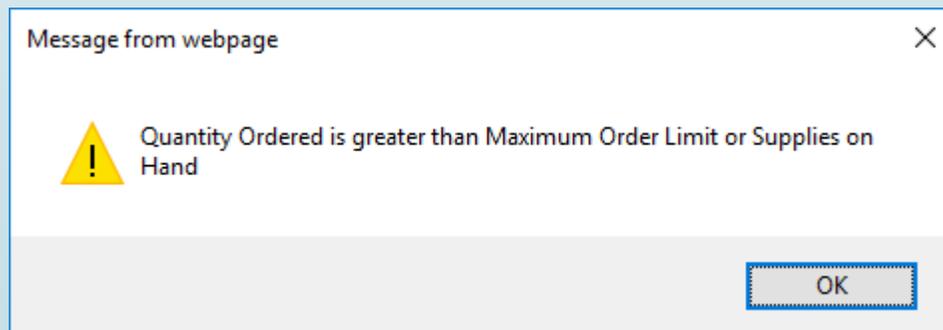
The screenshot shows a web application interface for creating a new order. At the top, there are several input fields: 'Order Status' (set to 'Un-Submitted'), 'Order #' (empty), 'Order Created Date Between' (with 'and' in between), and 'Local Agency/Clinic' (set to '010101 Alcona County Office'). A green 'Go' button is located below these fields. Below the search fields is a table with the following columns: 'Local Agency/Clinic*', 'Order...', 'Form #*', 'Description*', 'Quantity Ordered*', 'Shipping Address*', 'Quantity Shipped', and 'Sup on'. The table has one row with a yellow background, and a dropdown menu is open over the 'Form #' column, showing a list of form numbers: '3', 'DCH-125', 'DCH-1318', 'DCH-1319', 'F1Form', 'F2Form', 'F3Form', and 'June123'. At the bottom of the interface, there are buttons for 'Add', 'Remove', 'Submit', 'Save', and 'Cancel'.

- Next, the user will need to select the *Form Number* **OR** the *Form Name* from the available drop-down menus
 - When one is selected, the other will automatically fill in
 - i.e. if you select DCH-1318, the description will automatically populate as 'Questionnaire'
- The drop-down menu will also indicate form status:
 - If a form is Greyed out, this indicates that it is currently Out of Stock or unavailable to order
 - If a form has been removed from the list, it is no longer in use

E-Forms

Creating a New Order

- ▶ Once you have selected the form, the **'Supplies on Hand'** and **'Maximum Order Limit'** will display
- ▶ *Keep in mind*, you cannot order more than the maximum and you cannot order more than what is in stock



Order Status: Un-Submitted

Order #:

Order Created Date Between: and

Local Agency/Clinic: 010101 Alcona County Office

Go

Order...	Form #*	Description*	Quantity Ordered*	Shipping Address*	Quantity Shipped	Supplies on Hand	Maximum Order Limit for Clinics	Order Date
	DCH-1319	Infant Questionnaire				184	5	

< Add Remove >

Submit Save Cancel

E-Forms

Creating a New Order

Order Status:

Order #:

Order Created Date Between: and

Local Agency/Clinic:

Order...	Form #*	Description*	Quantity Ordered*	Shipping Address*	Quantity Shipped	Supplies on Hand	Maximum Order Limit for Clinics	Order Date
	DCH-1319	Infant Questionnaire	5			184	5	

- ▶ Staff will enter the number they would like to order in the 'Quantity Ordered' column on the grid
- ▶ Keep in mind the 'Supplies on Hand' and the 'Maximum Order Limit'

E-Forms

Creating a New Order

- ▶ Finally, users will need to select the shipping address to which the forms will be mailed from the 'Shipping Address' drop-down menu
 - ▶ When logged in under the **clinic** level, *only* the address for that clinic will be listed
 - ▶ When logged in under the **local agency** level, *all* clinic addresses within the local agency will be listed

The screenshot displays the E-Forms system interface. At the top, there are several input fields: 'Order Status' (set to 'Un-Submitted'), 'Order #' (empty), 'Order Created Date Between' (with date pickers), and 'Local Agency/Clinic' (set to '010000 District Health Department No. 2'). A green 'Go' button is located below these fields.

Below the search fields is a table with the following columns: 'Local Agency/Clinic*', 'Order...', 'Form #*', 'Description*', 'Quantity Ordered*', 'Shipping Address*', 'Quantity Shipped', and 'Su on'. The table contains one row with the following data: '010101 Alcona County Office', an empty 'Order...' field, 'DCH-1319', 'Infant Questionnaire', '5', 's ville 48740 MI', an empty 'Quantity Shipped' field, and '184'. A red arrow points to the 'Shipping Address*' column, which has a dropdown menu open. The dropdown menu lists several addresses: '630 Progress Street ,West Branch 48661 MI', '311 Lake St ,Harrisville 48740 MI' (highlighted in blue), '320 S. Walnut st ,Lansing 48912 MI', and 'New Clinic st ,Lansing 48912 MI'. Below the table, there are 'Add' and 'Remove' buttons. At the bottom right, there are 'Submit', 'Save', and 'Cancel' buttons.

E-Forms

Creating a New Order

- After saving, the 'Ordered by' column will automatically populate based on the user ID logged in

Order Status:

Order #:

Order Created Date Between: and

Local Agency/Clinic:

Form #*	Description*	Quantity Ordered*	Shipping Address*	Quantity Shipped	Supplies on Hand	Maximum Order Limit for Clinics	Order Date	Ordered By
-1319	Infant Questionnaire	5	311 Lake St ,Ha...		184	5		RESSLERK

E-Forms

Creating a New Order

Order Status: Un-Submitted

Order #:

Order Created Date Between: and

Local Agency/Clinic: 010000 District Health Department No. 2

Go

Local Agency/Clinic*	Order...	Form #*	Description*	Quantity Ordered*	Shipping Address*	Quantity Shipped	Sup on
010101 Alcona County Office		DCH-1319	Infant Questionnaire	5	311 Lake St ,Ha...		184

Add Remove

Submit Save Cancel

- ▶ Continue to add lines until all of the forms have been entered.
- ▶ *Remember, you have to save before the 'SUBMIT' button at the bottom of the page becomes active.*
- ▶ Orders are only processed after they have been SUBMITTED.

E-Forms

Creating a New Order

- Once all forms have been entered, staff can submit the order.
 - Keep in mind, You only want **one clinic** and **one shipping address** per order
 - If you entered forms for more than one clinic at a time, utilize the 'Local Agency/Clinic' Filter at the top of the screen to submit one clinic at a time

Order Status: Un-Submitted

Order #:

Order Created Date Between: and

Local Agency/Clinic: 010101 Alcona County Office

Go

Local Agency/Clinic*	Order...	Form #*	Description*	Quantity Ordered*	Shipping Address*	Quantity Shipped	Sup on
010101 Alcona County Office		0001F3	0001F3	15	311 Lake St ,Ha...		392
010101 Alcona County Office		DCH-1319	Infant Questionnaire	5	311 Lake St ,Ha...		184

Add Remove

Submit Save Cancel

When submitting an order, make sure a clinic is selected

E-Forms

Creating a New Order

Order Status: Pending

Order #: 373

Order Created Date Between: and

Local Agency/Clinic: 010101 Alcona County Office

Go

Local Agency/Clinic*	Order...	Form #*	Description*	Quantity Ordered*	Shipping Address*	Quantity Shipped	Sup on
010101 Alcona County Office	373	0001F3	0001F3	15	311 Lake St ,Ha...		392
010101 Alcona County Office	373	DCH-1319	Infant Questionnaire	5	311 Lake St ,Ha...		184

Add Remove

Submit Save Cancel

- Once the order is submitted, an 'Order Number' and 'Order Date' will be generated
- The order will now be classified as status 'Pending'
- Utilize the 'Order Status' filter at the top of the screen to monitor the status of the order and see when it has shipped.

E-Forms Reporting

- ▶ The 'Forms List' Report will display forms and their current status.
 - ▶ Use this report to see what forms are currently available to order or what is currently out of stock
- ▶ To access the report, select 'Forms List' from the 'Reports' drop-down menu

MI-WIC EForms - Internet Explorer

MI-WIC Management Information Michigan WIC

File Administrative Mail Room Agencies Reports Forms List

Order Status: [Dropdown]
Order #: [Text]
Order Created Date Between: [Date] and [Date]
Local Agency/Clinic: 010101 Alcona County Office

Go

Local Agency/Clinic*	Order...	Form #*	Description*	Quantity Ordered*	Shipping Address*	Quantity Shipped	Su on
010101 Alcona County Office	373	0001F3	0001F3	15	311 Lake St ,Ha...		392
010101 Alcona County Office	373	DCH-1319	Infant Questionnaire	5	311 Lake St ,Ha...		184

Add Remove

Submit Save Cancel

Version: 8.0.0.11 RESSLERK 010101 Alcona County Office miwics

E-Forms Reporting

Forms List

Form #

Form Description

All

Active

Non Active

No Longer Used

- ▶ Select either a specific Form or run based on form status

Form Status:

- ▶ **Active**- in use and available
- ▶ **Non Active**- in use but unavailable at this time
- ▶ **No Longer Used**- Form has been discontinued

E-Forms Reporting

Report Date: 05/21/2018

Michigan WIC Program Forms List

Page 1 of 3

Form#	Description	Form Status	Supplies On Hand	Maximum Order Limit for clinics	Admin Comments
0001BUG	0001BUG	Not-Active	0	20	may comments
0001F1	0001F1	Active	37	10	test
0001F2	0001F2	Not-Active	0	15	
0001F3	0001F3	Not-Active	0	20	
0001F4	0001F4	Not-Active	0	15	
0001F5	0001F5	No longer used	11	11	
0002BUG	0002BUG	Not-Active	0	12	
00125	Descrip Change	Active	230	15	
001FORM6	FORM6	Not-Active	0	15	
0214test	test	Not-Active	0	10	
0DEC26	0DEC26	Not-Active	0	20	12/26/2017
1	1	Active	10	10	
100FORM7	0000FORM7	Not-Active	0	10	
114gt	new	Not-Active	5	5	
12345test	new idea	Not-Active	0	10	
2	2	Not-Active	0	10	

- The report will display
 - Form Number and Description
 - Status
 - Supplies on Hand
 - Maximum Order Limit
 - Admin Comments
 - Comments entered by State Staff regarding the form, form status or other related details



E-Forms

Friendly Reminders

- ▶ Keep in mind, you cannot order more than the maximum order limit and you cannot order more than what is in stock.
- ▶ When logged in under the Clinic level, **only** the address for that clinic will be listed under “Shipping address”. When logged in under the local agency level, **all** clinic addresses will be listed.
- ▶ If multiple forms are needed, continue to add lines until all forms have been entered, and then click submit after ALL appropriate forms have been added. This process will reduce shipping costs/quantities.
 - ▶ Each clinic should limit ordering to ONE time per week to maintain adequate stock and contain costs.
- ▶ Remember you must “Save” before you click “Submit” on an order.
- ▶ You must SUBMIT the order for it to be processed and sent to your clinic.
 - ▶ You know the order has been submitted when:
 - ▶ An Order Number appears next to the Form #
 - ▶ When it no longer appears under the ‘Un-Submitted’ Order status (filter at top of screen)



E-Forms

If you have questions specific to E-Forms, please contact Hanna Thelen at thelenh1@Michigan.gov