



WIC Direct System Guide

Version: 1.00

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1 Document Information

1.1 Document History

Version	Comments
1.0	Initial draft

2 Introduction

2.1 Document Purpose

This document describes the functionality, configuration, and operation of the WIC Direct System. The target audiences for this guide include:

- Customer support
- State program administrators
- System and network administrators

This document provides step-by-step instructions on using functions in WIC Direct and can be used for training new users, however the WIC Direct Training Guide PowerPoint is generally used for training.

2.2 Document Organization

This document is organized into the following sections:

- Section 3, “**Getting Started**” describes key concepts that users must understand before using the application for the first time, such as the general application layout and how to start and log into the application.
- Section 4, “**Website Functions**” provides step-by-step descriptions of how to use system functions.
- Section 5, “**System Configuration**” describes the configuration and types of settings applied in WIC Direct, including: machine settings, data access timeouts, cache expiration times, and installations.

2.3 Document Conventions

Throughout the document, the following conventions are used:

- The terminology “click” and “select” indicate that the user should left-click their mouse button once.
- Nomenclature such as GENERAL->MAIN MENU signifies a navigation path.

3 Getting Started

3.1 System Overview

At a high level, WIC Direct connects local agency clinics where participants are certified eligible for the Special Supplemental Nutrition Program for Women, Infants, and Children (WIC); stores (vendors) and farmers' markets where WIC participants exchange benefits for food; government employees who administer the WIC program; and banks who electronically reimburse stores and farmers' markets for WIC purchases.

WIC participants access their benefits using magnetic stripe debit cards (online) or integrated circuit chip cards (offline) instead of a traditional paper food instrument. Highlights of the EBT process include:

- WIC Agencies use WIC Direct to manage the list of WIC-eligible food items, prices, and retailers.
- Participants are certified as WIC eligible at a clinic. After verification of eligibility and risk assessment, food benefits are issued and posted electronically to the household account stored in WIC Direct. In offline, food benefits are also posted electronically to the card itself.
- Food benefits are aggregated into a single household account. The household account consists of specific types and quantities of food items, each with specific eligibility and expiration dates. Expiration dates are based on the household monthly benefit cycle established at enrollment.
- An EBT card is issued to one or more cardholders in each household, as allowed by State policy or by the EBT card technology in use. The card is secured with a personal identification number (PIN).
- Participants can access food benefits when shopping in stores and at farmers' markets. When checking out, the participant swipes or enters their EBT card and enters their PIN.
- The store verifies available benefits. In offline, the store also updates the benefit balance available on the card. WIC Direct also verifies available benefits and prices for food items as part of the purchase transaction processing (in real-time for online, and as claim files are received in offline).
- The businesses where WIC participants shop receive electronic payment from the State for WIC-eligible purchases via an automated clearinghouse (ACH) settlement process. Collectively referred to as vendors throughout this document, vendors can connect directly to WIC Direct or via a value-add third party provider. The settlement process between a bank and vendor varies depending on how the vendor connects to WIC Direct. Section 4.10 **Settlement** describes this process in more detail.

WIC Direct supports the WIC EBT process by providing:

- Electronic Benefit Account (EBA) maintenance

- Universal Product Code (UPC), Price Look UP (PLU), and Not-to-Exceed (NTE)
- Clinic transaction processing
- Retail transaction processing
- Vendor maintenance
- Payment to vendors
- Financial reconciliation
- Reporting

WIC Direct interfaces with the external WIC Management Information System (MIS) that supports the Universal Interface specification. Communication between WIC Direct, banks, and vendors is via X9.93 messaging and/or files. The selected file transfer protocol (FTP) is used to transfer files between WIC Direct, vendors, and other systems.

3.2 Supported Browsers

The following browsers, both the current and previous major versions, are officially supported for client machines using WIC Direct:

- Firefox
- Google Chrome
- Edge Chromium

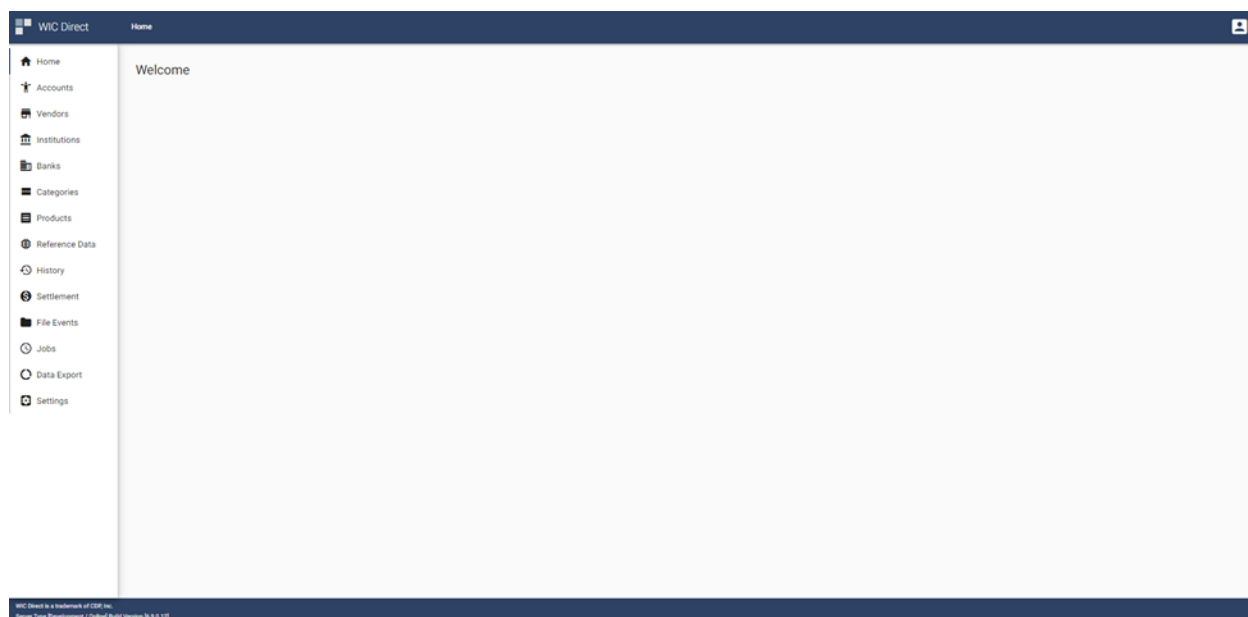
3.3 Interface Overview

The WIC Direct web user interface (WUI) provides administrative access for state agency staff. The WIC Direct WUI component is the web-based interface the user sees once logged into WIC Direct. Users access WIC Direct from a web-browser using their existing workstation. The WUI provides a graphical user interface that includes drop down lists and point-and-click capabilities and offers a considerable amount of administrative functionality.

The WIC Direct WUI has an updated look and a responsive design that will scale to different devices (such as tablets and mobile phones) and dynamically adjust to different screen sizes. Search screens support modern features such as dynamic filtering where matching search results render as the user is typing.

The WUI Direct WUI uses a standard role-based security framework to control what users can see and do within the system.

When a user signs in, the home page is displayed featuring a menu on the left side of the page as follows:

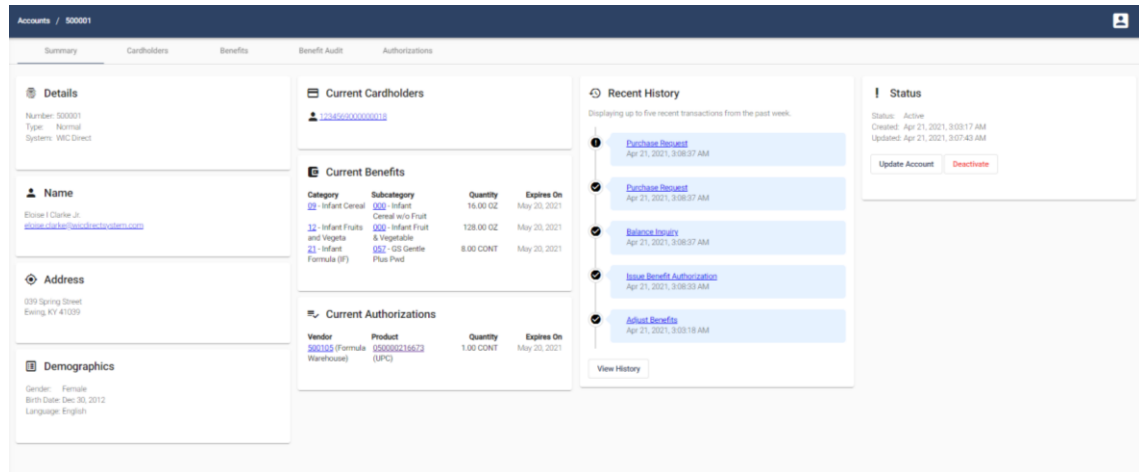


Most items in the menu correspond to lists, or sets of data organized into columns. For example, the following page shows the list of accounts/cards in the system:

Search number or name					Select types	Include inactive	View: Households	New Account
Number ↑	Type	Name	Address	Status				
> 500001	Normal	Dean X Underwood	753 5th Street Knifley, KY 42753	Active				
> 500002	Normal	Jeremy W Mason Jr.	621 Grant Street Halle, KY 41821	Active				
> 500003	Normal	Hyrum M Donovan	533 Evergreen Drive Lexington, KY 40533	Active				
> 500004	Normal	Dex U Myers Sr.	501 Edgewood Road Somerset, KY 42501	Active				
> 500005	Normal	Francis U Barnes	464 Canterbury Court White Plains, KY 42464	Active				
> 500006	Normal	Berlynn B Frederick Sr.	296 Cypress Court Louisville, KY 40296	Active				
> 500007	Normal	Ballee E Morrow Jr.	647 Bridge Street Keniv, KY 40847	Active				
> 500008	Normal	Byron F Frey	166 Bottomwood Drive Suite 87654 Summer Shade, KY 42166	Active				
> 500009	Normal	Sheridan W Glover Sr.	041 Magnolia Court Fulton, KY 42041	Active				
> 500010	Normal	Robin I Dunlap Jr.	538 Bank Street Jenney, KY 41538	Active				
> 500011	Normal	Vincent M Whitney Jr.	566 Cardinal Drive Unit 12542 Steele, KY 41566	Active				
> 500012	Normal	Garrison N Warner	183 School Street Worthington, KY 41183	Active				
> 500013	Normal	Caren T Drake	051 Essex Court Suite 87323 Hickory, KY 42051	Active				
> 500014	Normal	Haiden I Bryant	201 Walnut Avenue Louisville, KY 40201	Active				
> 500015	Normal	Shane A Andrews	178 Pearl Street Unit 12379 Westview, KY 40178	Active				
> 500016	Normal	Lashon K Vincent	045 Carriage Drive Suite 23447 Grand Rivers, KY 42045	Active				

The number of rows that that display on the page is configurable, and a user can page back and forth through the data. The top of each page contains a set of filter/search criteria that users may use to find a specific record or to see a group of records. Users may sort the information in the list by clicking on the label for any column (Number, Type, Name, Address, or Status in the above example). From the list page, users can navigate to view details for a specific record.

For example, the cardholder page allows users to search accounts based on name, account number (MIS family ID), or card number to search for a specific account. Once the user finds the desired account, they can navigate to the details page for the account.



The WIC Direct WUI uses card-based design for organizing information on detail pages. A “card” is a rectangular area of the page that contains a subgroup of information. In the example using the Account Details, the user sees cards for different aspects of account information such as: demographics, list of current cardholders, current benefits, and recent transaction history.

From the detail pages, users can navigate to different pages to view additional information related to the current detail record being viewed. Continuing with the example above, the user can navigate to the Cardholders, Benefits, Benefit Audit, and Authorizations details pages for the account.

The WIC Direct WUI repeats this general design pattern for organizing other information stored in WIC Direct.

3.4 Logging In

The Login page allows users to access WIC Direct by two login methods, either using local credentials or using credentials with supported external services. Refer to the *CDP Identity System Guide* for more detailed information.



Login

Enter your local login credentials.

Logging in to: WIC Direct Website

Username *

Password *

☐ Remember my login

Login

Cancel

[Forgot password?](#)

Use another service to login.

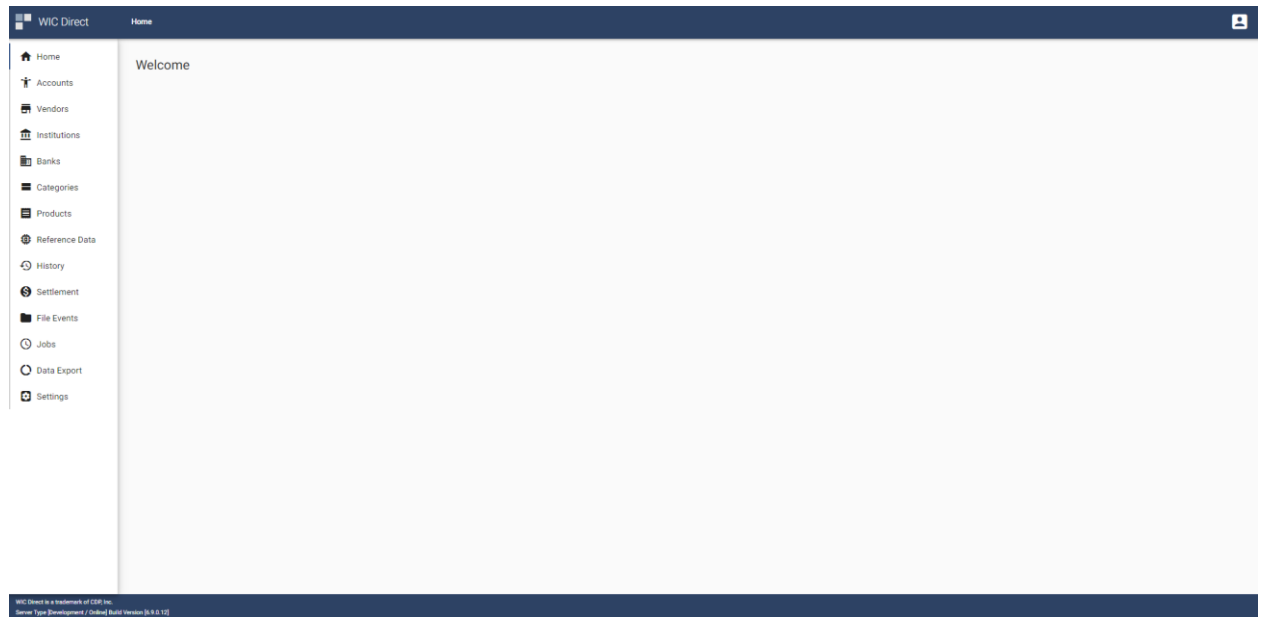
CDP, Inc.

Copyright © 2021 CDP, Inc. - Server Type [Testing] Build Version [1.1.20201111.1]

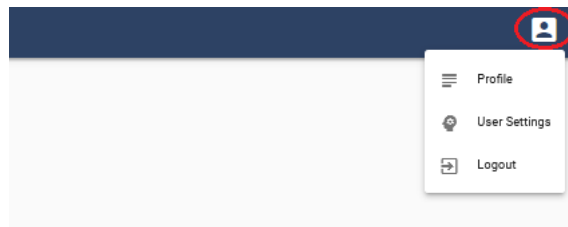
4 Website Functions

4.1 Home

The WIC Direct Home page displays a menu of all website functions a user has access to based on their security roles.



Clicking the icon on the top right of the Home page allows a user to access their profile, settings, or to logout of the system.



4.1.1 Profile

The Profile page allows users to update or change a number of pieces of information associated with their profile including: Name, Phone Number, Username, and Email. Full functionality of the CDP Identity system is described in the *CDP Identity System Guide*.

4.1.2 User Settings

The User Settings page displays the following configurable user settings.

User Settings

Items Per Page
Some screens display data using a paginated format. This setting controls the number of items displayed per page. Items Per Page * 20

Time Zone
Screens display date and time values, unless otherwise noted, in your local time zone. Your current local time zone is (UTC-05:00) America/New_York. This setting overrides that default with a different value. Time Zone

Save

- Items Per Page controls the number of items displayed per page for data displayed using a paginated format.
- Time Zone overrides the user's default time zone with a different value.

4.2 Accounts

The Accounts function is used to perform a variety of tasks related to WIC participant accounts stored in WIC Direct. This includes:

- Adding a new account
- Searching for an existing account
- Viewing account details
- Updating account information
- Adding, deleting, and modifying benefits
- Performing card and PIN maintenance
- Exporting account and benefit information

Normally, account numbers are created by the WIC MIS and added to WIC Direct using the interface between the two systems. However, WIC Direct also provides the ability to add new accounts directly via the WDWUI on the Accounts page.

Accounts				
<input type="text" value="Search number or name"/>		Select types ▼	<input type="checkbox"/> Include inactive	<input type="button" value="New Account"/>
Number ↑	Type	Name	Address	Status
> 500001	Normal	Blair D Blankenship	621 12th Street Dwale, KY 41621	Active
> 500002	Normal	Dash H Rosales	775 Bay Street Wendover, KY 41775	Active
> 500003	Normal	Elias J Wu Jr.	049 Ridge Street Nerinx, KY 40049	Active
> 500004	Normal	Cameron Z Crawford	058 Augusta Drive Suite 87654 Port Royal, KY 40058	Active
> 500005	Normal	Kent C Dean	201 Franklin Court Suite 44326 Aberdeen, KY 42201	Active
> 500006	Normal	Aryn P Deleon Sr.	643 Walnut Street Unit 97534 Lackey, KY 41643	Active
> 500007	Normal	Lane G Warner Sr.	228 Atlantic Avenue Suite 85345 Louisville, KY 40228	Active
> 500008	Normal	Francis E Ross	364 Walnut Avenue Unit 93452 Hawesville, KY 42364	Active
> 500009	Normal	Caren K Hensley	772 Cedar Street Vest. KY 41772	Active

4.2.1 Adding a New Account

1. To add a new account from the Accounts page, click **New Account**.

Accounts				
<input type="text" value="Search number or name"/>		Select types ▼	<input type="checkbox"/> Include inactive	<input type="button" value="View: Households"/> <input type="button" value="New Account"/>
Number ↑	Type	Name	Address	Status
> 500001	Normal	Tristan P Blankenship	036 Mill Road Dentler, KY 42036	Active
> 500002	Normal	Dash X Harrison	037 Hamilton Road Elizaville, KY 41037	Active
> 500003	Normal	Abigail E Hancock	539 5th Street Suite 85345 Kemper, KY 41539	Active
> 500004	Normal	Tanner P Booker Jr.	963 Myrtle Avenue Sedona Creek, KY 40983	Active

The New Accounts page will display.

Accounts / New

Details

Number Type **Normal** System **WIC Direct**

Name

First Name Middle Initial Last Name Suffix

Email Address

Address

Address 1


Address 2

City State Zip Code

Demographics

Gender Birth Date Language

2. Complete the fields in the Details, Name, Address, and Demographics panels.
3. Click **Save**.

 If a required field is left blank, the Save button is grayed out and an error message will display under the missing field.

4.2.2 Search for an Existing Account

1. To search for an existing account, enter the household **Number** or **Name** associated with an account in the search field. As text is entered in the search field the results will begin to populate to match the search criteria.

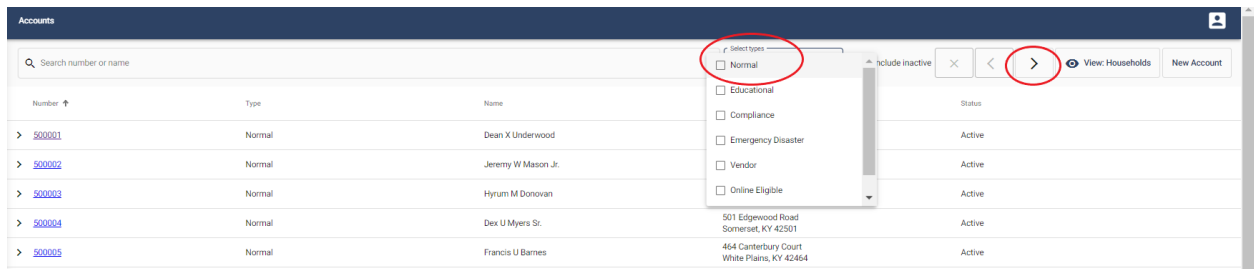
Accounts

Search number or name

Select types Include inactive ☐ View Households

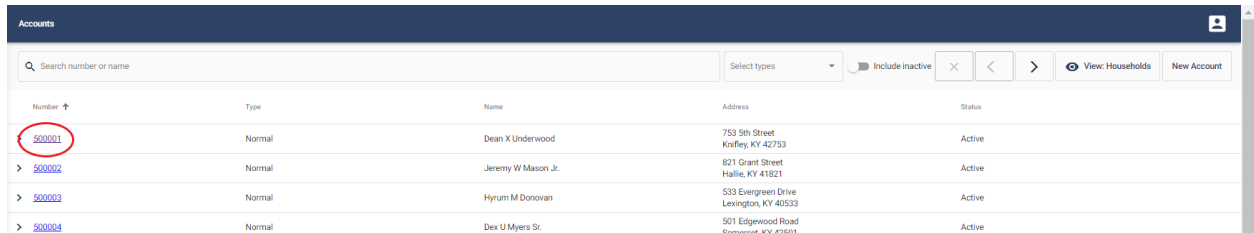
Number	Type	Name	Address	Status
> 500013	Normal	Caren T Drake	051 Essex Court Suite 87323 Hickory, KY 42051	Active

Account results can be narrowed by selecting the type. Account types include: Normal, Educational, Compliance, Emergency Disaster, Vendor, and Online Eligible. Additionally, the results can be sorted by clicking the column name (Number, Type, Name, Address, Status). To move through pages of search results, use the forward or back arrows at the top of the page.



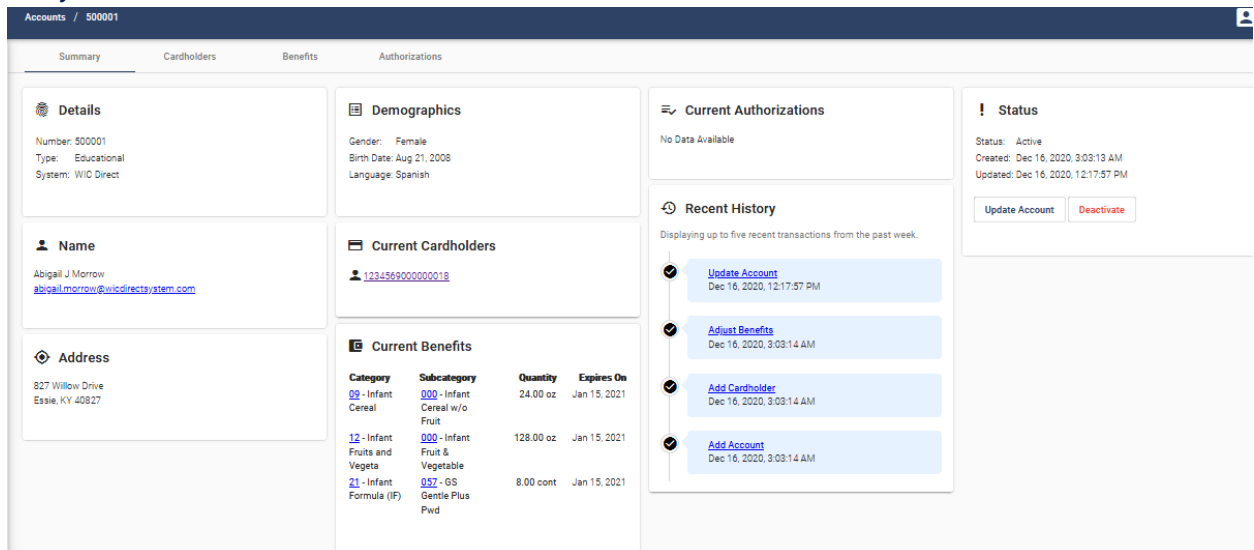
4.2.3 Viewing Account Details

1. To view the details for an account, click the blue **Account Number** link associated with the account.



The Account Details for the account will display.

4.2.3.1 Summary



The first page of Account Details is the account Summary. The Summary page shows cards for general Details, Demographics, Current Authorizations, Status, Name, Current Cardholders, Recent History, Address, and Current Benefits.

4.2.3.2 Cardholders

The Cardholders tab in Account Details shows the Card Number, Type, Cardholder Name, Address, Activated date and time, Deactivated date and time, and Status.

Accounts / 500001 / Cardholders							
Summary		Cardholders	Benefits	Authorizations			
Number	Type	Name	Address	Activated	Deactivated	Status ↑	
1234569000000018	Primary	Aryn X Vaughan	134 Front Street Franklin, KY 42134	Jan 1, 2015, 12:00:00 AM		Active	

4.2.3.3 Benefits

The Benefits tab in Account Details shows the benefits period, Category, Subcategory, Issued amount, and Remaining amount.

Accounts / 500001 / Benefits				
Summary		Cardholders	Benefits	Authorizations
Select periods Dec 15, 2020 - Jan 15, 2021				
Category ↑	Subcategory	Issued		Remaining
09 - Infant Cereal	000 - Infant Cereal w/o Fruit	24 oz		24 oz
12 - Infant Fruits and Vegeta	000 - Infant Fruit & Vegetable	128 oz		128 oz
21 - Infant Formula (IF)	057 - GS Gentle Plus Pwd	8 cont		8 cont

4.2.3.4 Authorizations

The Authorizations tab in Account Details shows the vendor information, product information, original amount, and remaining amount for an authorization.

Accounts / 500001 / Authorizations				
Summary		Cardholders	Benefits	Authorizations
Select periods Apr 13, 2021 - May 13, 2021				
Vendor ↑	Product	Original		Remaining
500100 (Formula Warehouse) Bobs Formula Warehouse #6	050000216673 (UPC) Good Start Gentle Plus Pwd	1.00 CONT		1.00 CONT

4.2.4 Cardholders

The Cardholders View is used to:

- Search for EBT cards or groups of cards that have assigned benefits
- Search for cards assigned to an account or cardholder
- Check the status of an EBT card

From the Accounts page, the view can be switched to cardholders by clicking **View: Account** at the top right of the page, and selecting **Cardholder** from the drop-down.

Accounts					
Search number or name			Select types	<input type="checkbox"/> Include inactive	<input type="button" value="View: Households"/> <input type="button" value="New Account"/>
Number ↑	Type	Name	Address	Status	<input type="button" value="Households"/> <input type="button" value="Cardholders"/>
> 500001	Normal	Dean X Underwood	759 5th Street Kovfey, KY 42753	Active	
> 500002	Normal	Jeremy W Mason Jr.	821 Grant Street Hallie, KY 41821	Active	
> 500003	Normal	Hyrum M Donovan	533 Evergreen Drive Lexington, KY 40533	Active	
> 500004	Normal	Dex U Myers Sr.	501 Edgewood Road Somerset, KY 42501	Active	

The page view will switch to Cardholders and display the Card Number, Account Number, Type, Cardholder Name, Address, and Status.

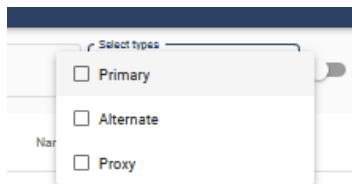
Accounts					
Search number or name		Select types	Include inactive	View: Cardholders New Account	
Number (Card) ↑	Number (Account)	Type	Name	Address	Status
1234569000000018	500001	Primary	Adelaide K Rivera	602 Colonial Avenue Albany, KY 42602	Active
1234569000000026	500002	Primary	Harrison B Kelley	516 Liberty Street Lexington, KY 40516	Active
1234569000000034	500003	Primary	Caren I Foley	935 Esson Court Unit 12542 Flat Lick, KY 40935	Active
1234569000000042	500004	Primary	Adelaide X Wu	002 Central Avenue Paducah, KY 42002	Active
1234569000000059	500005	Primary	Elijah P Hensley	774 Orchard Lane Suite 44326 Viper, KY 41774	Active
1234569000000067	500006	Primary	Louisa Y Levy	092 Bridge Street Verona, KY 41092	Active
1234569000000075	500007	Primary	Sophia R Huynh	001 Birdie Lane Unit 97534 Paducah, KY 42001	Active
1234569000000083	500008	Primary	Tobias H Ross	818 Cedar Street Suite 85345 Coalgood, KY 40818	Active
1234569000000091	500009	Primary	Berlynn D Moreno	201 Mill Road Aberdeen, KY 42201	Active

4.2.4.1 Searching for a Cardholder

1. To search for a cardholder, enter the **number** or **name** in the search field. As text is entered in the search field the results will begin to populate to match the search criteria.

Accounts					
Search number or name		Select types	Include inactive	View: Cardholders New Account	
1234569000000006					
Number (Card) ↑	Number (Account)	Type	Name	Address	Status
1234569000000067	500006	Primary	Louisa Y Levy	092 Bridge Street Verona, KY 41092	Active

Cardholder results can be narrowed by type. Cardholder types include: Primary, Alternate, and Proxy. Use the Select Types drop-down filter by type.



4.2.4.2 Viewing Cardholder Details

1. To view the details for a specific cardholder, click the **Card Number** link associated with the cardholder.

Accounts		
Search number or name		
1234569000000006		
Number (Card) ↑	Number (Account)	Type
1234569000000067	500006	Primary

The Cardholder Details page will display.

Accounts / 500006 / Cardholders / 1234569000000067

Details
 Number (Card): 1234569000000067
 Number (Account): [500006](#)
 Type: Primary

Name
 Natalie O Andersen
natalie.andersen@wicdirectsystem.com
[2024729743](tel:2024729743)

Demographics
 Gender: Female
 Birth Date: Jul 9, 1990
 Language: French
 Relationship: Grandfather

Status
 Status: Active
 Created: Dec 16, 2020, 3:03:14 AM
 Updated: Dec 16, 2020, 3:07:52 AM
[Deactivate](#)

PIN
 Selected: Yes
[Clear PIN History](#)

Address
 524 Bridle Court
 Unit 97534
 Lexington, KY 40524

Recent History
 Displaying up to five recent transactions from the past week.

- [Adjust Benefits](#)
Dec 16, 2020, 3:03:14 AM
- [Add Cardholder](#)
Dec 16, 2020, 3:03:14 AM

The Cardholder Details page is used to view demographic information and recent history for a cardholder. A card can be deactivated by clicking Deactivate. PIN history can be cleared by clicking Clear PIN History.

Clicking on an action in the Recent History card will display details on the transaction as shown below when viewing the Adjust Benefits details:

History / 107

Details
 Number (Host Generated): 107
 Type: Adjust Benefits

Account
 Number: [500006](#)
 Number (Card): [1234569000000067](#)
 Type: Normal

Clinic
 System: WIC Direct
 Workstation: KYTP01
 Initiating User: tim.finnie

Status
 Status: 000 - Approved.

Date/Time
 Received: Feb 4, 2021, 3:03:01 AM
 Local: Feb 4, 2021, 8:03:01 AM

4.3 Vendors

Vendors					
<input type="text"/> Search number or name			Select types	Select peer groups	<input type="checkbox"/> Include inactive
<input type="button"/> New Vendor					
Number (MS) ↑	Number (X9)	Type	Name	Address	Peer Group
500101	2	Corporation	Caseys Food Stores #2	061 Queen Street Suite 87654 Lowes, KY 42061	Peer Group 1
500102	3	Corporation	Country Fair Store #3	575 Oak Street Suite 87654 Lexington, KY 40575	Peer Group 2
500103	4	Corporation	Village Market #4	847 Bridle Court Suite 23447 Kenvir, KY 40847	Peer Group 3
500104	5	Corporation	Village Market #5	721 Bridle Lane Caneyville, KY 42721	Peer Group 4
500105	6	Formula Warehouse	Bobs Formula Warehouse #6	391 Union Street Winchester, KY 40391	Peer Group 5
500106	7	Corporation	Bobs Food Markets #7	215 Willow Drive Cerulean, KY 42215	Peer Group 5
500107	8	Corporation	Sparkle Super Markets #8	762 School Street Millwood, KY 42762	Peer Group 1
500108	9	Corporation	Sparkle Super Markets #9	508 Cambridge Road Lexington, KY 40508	Peer Group 2
500109	10	Corporation	Key Food Supermarket #10	286 Wood Street Trenton, KY 42286	Peer Group 3
500110	11	Corporation	Town Food Market #11	253 Franklin Street Louisville, KY 40253	Peer Group 4
500111	12	Corporation	Wrights Market #12	153 Virginia Street McQuady, KY 40153	Peer Group 5
500112	13	Corporation	Buy For Less #13	001 Evergreen Drive Alexandria, KY 41001	Peer Group 5
500113	14	Corporation	Bishop Brothers #14	727 Front Street Unit 12542 Charles, KY 41727	Peer Group 2
500114	15	Corporation	River Grocery Coop #15	825 Heather Court Unit 65563 Jackson, KY 41825	Peer Group 3
500115	16	Corporation	Bishop Brothers #16	473 Bay Street Remfro Valley, KY 40473	Peer Group 4
500116	17	Corporation	Buy For Less #17	232 Green Street Suite 87654 Louisville, KY 40232	Peer Group 2

State WIC Program administrators use the Vendors function to:

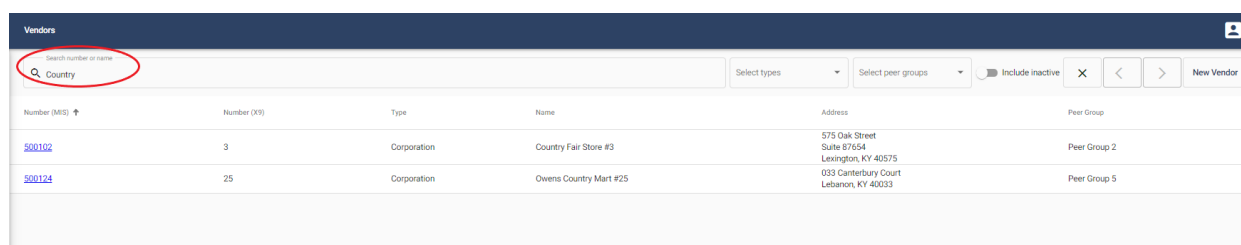
- Search for and view vendors and banks
- Add new vendors and banks
- Update vendor and bank information
- Deactivate and reactivate a vendor or bank
- Export vendor information
- Associate a bank with a vendor

Vendors are categorized into peer groups defined by the state.

4.3.1 Searching for a Vendor

The top section of the Vendors page is used to filter the list of vendors displayed.

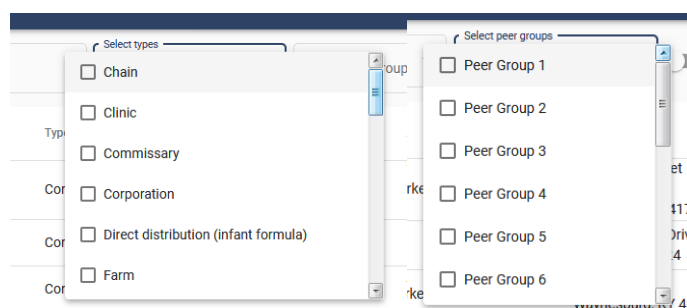
1. To search for an existing vendor, enter the **vendor number** or **name** in the search text box. As text is entered in the search field the results will begin to populate to match the search criteria.



The screenshot shows the 'Vendors' page interface. At the top, there is a search bar labeled 'Search number or name' with a magnifying glass icon. Below the search bar, there are filters for 'Select types', 'Select peer groups', and an 'Include inactive' toggle. The main content is a table with columns: Number (MIS), Number (XIS), Type, Name, Address, and Peer Group. Two vendors are listed: 'Country Fair Store #3' and 'Owens Country Mart #25'.

Number (MIS)	Number (XIS)	Type	Name	Address	Peer Group
500102	3	Corporation	Country Fair Store #3	575 Oak Street Suite 87654 Lexington, KY 40575	Peer Group 2
500124	25	Corporation	Owens Country Mart #25	033 Canterbury Court Lebanon, KY 40033	Peer Group 5

Additionally, vendors can be narrowed by vendor type and/or peer group by selecting the respective drop-down menu and selecting from the list.



The screenshot shows two dropdown menus. The 'Select types' menu is open, showing options: Chain, Clinic, Commissary, Corporation, Direct distribution (infant formula), and Farm. The 'Select peer groups' menu is also open, showing options: Peer Group 1, Peer Group 2, Peer Group 3, Peer Group 4, Peer Group 5, and Peer Group 6.

2. To include inactive vendors in the search, select the "Include inactive" toggle.
3. Click the MIS Number to view the Vendor Summary page

4.3.2 Viewing Vendor Details

When an **MIS Number** is clicked from the Vendors page, the Vendor Summary page displays.

Vendors / 500109

Summary Authorizations

Details
 Number (MIS): 500109
 Number (X9): 10
 Type: Corporation
 Name: Key Food Supermarket #10

Settings
 Over 50%: No
 Dial Up: No
 Direct Connect: Yes
 Custom ACH Cutoff: 12:00:00 PM
 Generate ARFs: Yes

Physical Address
 286 Wood Street
 Trenton, KY 42286

Current Authorizations
 Sorry, no data was found.

Categorization
 Peer Group: Peer Group 3

Files
 SFTP Account: LAB-m10
 Tracking Number: 12
 Individual APL: Yes
 Individual HCL: No
[View File Events](#)

Mailing Address
 286 8th Street
 Trenton, KY 42286

Recent History
 Displaying up to five recent transactions from the past week.
 Sorry, no data was found.
[View History](#)

Date Range
 Begin: Apr 18, 2021

Government
 Number (FNS): 41818539641

Status
 Created: Apr 19, 2021, 3:02:46 AM
 Updated: Apr 19, 2021, 3:07:17 AM

Settlement
 Food Sales (Self Reported): \$123,456,789.00

Contact
 Blake H Kim Sr.
blake.kim@keyfoodsystems.com
 (513) 952-5680
 (603) 132-8655

Bank Account
 Bank: Test Bank 2
 Number (Routing): 991111121
 Number (Account): 99111112
 Type: Checking

The first page of Vendor Details shows a summary of the selected vendor information on cards, including: Details, Settings, Physical and Mailing Address, Current Authorizations, Recent History, Categorization, Files, Government, Status, Date Range, Settlement, Contact, and Bank Account information.

The second page of Vendor Details shows authorizations, if any, for the vendor.

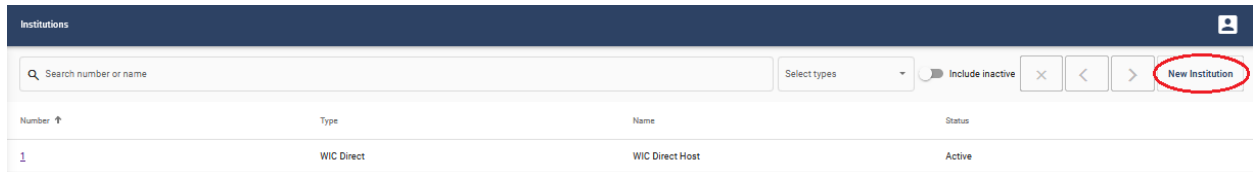
4.4 Institutions

The Institutions page displays details for all third-party payors in the system including the institution Number, Type, Name, and Status.

Institutions			
<input type="text" value="Search number or name"/>		Select types ▼	<input type="checkbox"/> Include inactive
		<input type="button" value="X"/> <input type="button" value="←"/> <input type="button" value="→"/> <input type="button" value="New Institution"/>	
Number ↑	Type	Name	Status
1	WIC Direct	WIC Direct Host	Active
2	Gateway MoS	FIS	Active
3	Gateway Non-MoS	Fifth Third	Active
4	Direct Connect	Novo Dia Group	Active
188802700	Acquirer	WorldPay	Active
2004300000	Acquirer	FIS Dial GA	Active
2004300010	Acquirer	FIS Dial	Active
2004300020	Acquirer	FIS Stand-Beside	Active
2004300030	Acquirer	FIS Stand-Beside	Active
2004300040	Acquirer	FIS Stand-Beside	Active
2004320040	Acquirer	FIS Stand-Beside	Active
2021600350	Acquirer	FIS Farmers Market	Active
10999908022	Acquirer	FIServe	Active
10999908035	Acquirer	FIServe	Active
99999999999	Direct Connect	Direct Connect Retailer	Active

4.4.1 Adding a New Institution

1. To add a new institution, click **New Institution**.



The New Institution page will display.

The screenshot shows the 'Institutions / New' page. It has a 'Details' section with fields for 'Number', 'Type' (set to 'Acquirer'), and 'Name'. Below is a 'Files' section with two toggle switches: 'Individual APL' and 'Individual HCL'. A 'Save' button is at the bottom right.

2. Complete the fields for **Number**, **Type**, and **Name**.
3. Select which file settings to enable, if any.
4. Click **Save**.

4.4.2 Viewing Institution Details

1. To view the details for a specific institution, click the institution **Number** link.

The screenshot shows the 'Institutions' page with a table of institutions. The first institution's number, '1', is circled in red.

Number	Type	Name	Status
1	WIC Direct	WIC Direct Host	Active
2	Gateway MoS	FIS	Active
3	Gateway Non-MoS	Fifth Third	Active
4	Direct Connect	Novo Dia Group	Active

The Institution Details page for that institution will display.

The screenshot shows the 'Institutions / 1' page. It has four main sections: 'Details' (Number: 1, Type: WIC Direct, Name: WIC Direct Host), 'Files' (SFTP Account: LAB-1, Tracking Number: 1, Individual APL: No, Individual HCL: No, View File Events button), 'Recent History' (Displaying up to five recent transactions from the past week, No Data Available), and 'Status' (Status: Active, Created: Dec 17, 2020, 3:02:40 AM, Updated: Dec 17, 2020, 3:05:58 AM, Update Institution button, Deactivate button).

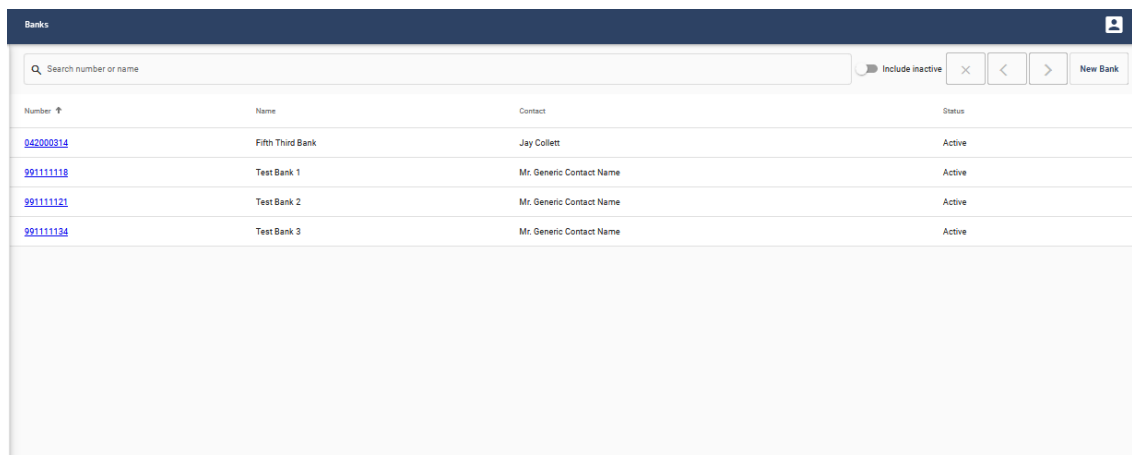
The Institution Details page shows the basic information details, corresponding Files, Recent History, and Status.

2. Optionally, view file events for a specific time frame by clicking **View File Events**, update institution details and file settings by clicking **Update Information**, or deactivate the institution by clicking **Deactivate**.

4.5 Banks

The linkage between vendor and bank in WIC Direct is needed in order for the vendor to receive payment for WIC purchases. The Banks submenu is used to:

- Search for and view bank information
- Add a new bank
- Update bank information
- Deactivate a bank
- Export bank information
- Link a bank to a vendor

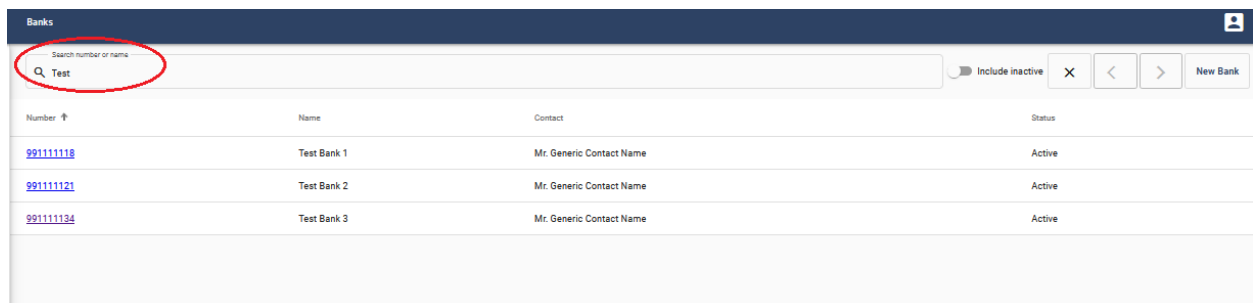


The screenshot shows the 'Banks' submenu interface. At the top, there is a search bar with the placeholder text 'Search number or name'. To the right of the search bar are buttons for 'Include inactive', 'X', '<', '>', and 'New Bank'. Below the search bar is a table with four columns: 'Number', 'Name', 'Contact', and 'Status'. The table contains four rows of data:

Number	Name	Contact	Status
042000314	Fifth Third Bank	Jay Collett	Active
991111118	Test Bank 1	Mr. Generic Contact Name	Active
991111121	Test Bank 2	Mr. Generic Contact Name	Active
991111134	Test Bank 3	Mr. Generic Contact Name	Active

4.5.1 Searching for and Viewing Bank Information

1. To search for an existing bank, enter the bank **Name** or account **Number**. As text is entered in the search field the results will begin to populate to match the search criteria.



This screenshot is similar to the previous one, but the search bar is highlighted with a red circle. The search bar contains the text 'Test'. The table below it shows the same data as the previous screenshot:

Number	Name	Contact	Status
991111118	Test Bank 1	Mr. Generic Contact Name	Active
991111121	Test Bank 2	Mr. Generic Contact Name	Active
991111134	Test Bank 3	Mr. Generic Contact Name	Active

2. Click the bank **Number** to view bank details.

The screenshot shows the 'Bank Details' page for bank 991111118. The page has a dark blue header with 'Banks / 991111118' and a user icon. Below the header are three tabs: 'Summary', 'Vendors', and 'Institutions'. The 'Summary' tab is active, showing four panels: 'Details', 'Contact', 'Links', and 'Status'. The 'Details' panel shows 'Number: 991111118' and 'Name: Test Bank 1'. The 'Contact' panel shows 'Mr. Generic Contact Name', 'contact@genericbank.com', and '800-333-3331'. The 'Links' panel shows 'Bank is linked with: 5 vendors'. The 'Status' panel shows 'Status: Active', 'Created: Feb 2, 2021, 3:02:48 AM', and 'Updated: Feb 2, 2021, 3:05:46 AM'. A red 'Deactivate' button is at the bottom right of the 'Status' panel.

The Bank Details page shows details such as Number, Name, Contact information, Links to vendors, and status. A bank can be deactivated by clicking **Deactivate**.

4.5.2 Adding a New Bank

1. To add a new bank, click **New Bank**.

The screenshot shows the 'New Bank' form. The page has a dark blue header with 'Banks / New' and a user icon. Below the header are two tabs: 'Details' and 'Contact'. The 'Details' tab is active, showing two input fields: 'Number *' and 'Name *'. The 'Contact' tab is also visible, showing three input fields: 'Name', 'Email Address', and 'Phone Number'. A 'Save' button is at the bottom right of the form.

2. Enter the bank **Number** and **Name** in the Details panel.
3. Enter the contact **Name**, **Email Address**, and **Phone Number** in the Contact panel.
4. Click **Save**.

4.6 Categories

There are 17 food categories in WIC Direct as established by the USDA Food and Nutrition Service. Each category has an associated numeric code and is subdivided into more specific food items, each with its own numeric code. The Categories page displays each category's Code, Name, Begin Date, and End Date.

Categories				
<input type="text" value="Search code or name"/> <input type="button" value="Include inactive"/> <input type="button" value="X"/> <input type="button" value="←"/> <input type="button" value="→"/> <input type="button" value="New Category"/>				
Code ↑	Name	Begin Date	End Date	
02	Cheese or Tofu	Mar 1, 2009	Dec 31, 2199	
03	Eggs	Mar 1, 2009	Dec 31, 2199	
05	Adult Cereal	Mar 1, 2009	Dec 31, 2199	
06	Legumes	Mar 1, 2009	Dec 31, 2199	
08	Fish	Mar 1, 2009	Dec 31, 2199	
09	Infant Cereal	Mar 1, 2009	Dec 31, 2199	
12	Infant Fruits and Vegetables	Mar 1, 2009	Dec 31, 2199	
13	Infant Meats	Mar 1, 2009	Dec 31, 2199	
16	Breads/Whole Grains	Mar 1, 2009	Dec 31, 2199	
19	Fruit & Vegetables Cash Value	Mar 1, 2009	Dec 31, 2199	
21	Infant Formula (IF)	Mar 1, 2009	Dec 31, 2199	
31	Exempt Infant Formula (EIF)	Mar 1, 2009	Dec 31, 2199	
41	WIC Eligible Medical Foods (WEMF)	Mar 1, 2009	Dec 31, 2199	
51	Milk Whole	Mar 1, 2009	Dec 31, 2199	
52	Milk Low fat	Mar 1, 2009	Dec 31, 2199	

From this page, administrators can:

- Add a new category
- View detailed information about a category
- Update a category
- Export category information

4.6.1 Searching for and Viewing a Category

1. To search for a category, enter the **Code** or **Name** in the search field.

Categories				
<input type="text" value="Search code or name"/> <input type="button" value="Include inactive"/> <input type="button" value="X"/> <input type="button" value="←"/> <input type="button" value="→"/> <input type="button" value="New Category"/>				
<input type="text" value="03"/>				
Code ↑	Name	Begin Date	End Date	Status
03	Eggs	Mar 1, 2009	Dec 31, 2199	Active

2. Click the **Code** link for a category to view details.

Categories				
<input type="text" value="Search code or name"/> <input type="button" value="Include inactive"/> <input type="button" value="X"/> <input type="button" value="←"/> <input type="button" value="→"/> <input type="button" value="New Category"/>				
<input type="text" value="03"/>				
Code ↑	Name	Begin Date	End Date	Status
03	Eggs	Mar 1, 2009	Dec 31, 2199	Active

The Categories Details page displays cards with general Details, Begin and End Date Range, Links to subcategories and products, and Status.

The screenshot shows the 'Categories / 03' page. It has a dark blue header with a user icon. Below the header are two tabs: 'Summary' and 'Subcategories'. The 'Summary' tab is active, showing four panels: 'Details', 'Date Range', 'Links', and 'Status'. The 'Details' panel shows 'Code: 03', 'Name: Eggs', and 'Name (Short): Eggs'. The 'Date Range' panel shows 'Begin: Mar 1, 2009' and 'End: Dec 31, 2199'. The 'Links' panel shows 'Category is linked with:' followed by a list: '5 subcategories' and '20 products'. The 'Status' panel shows 'Created: Apr 2, 2008, 7:47:00 AM' and 'Updated: Apr 14, 2021, 3:06:23 AM'.

4.6.2 Adding a New Category

1. To add a new category, click **New Category**.

The screenshot shows the 'Categories' page with a search bar and a table of categories. The 'New Category' button is circled in red in the top right corner. The table has columns for Code, Name, Begin Date, and End Date.

Code	Name	Begin Date	End Date
02	Cheese or Tofu	Mar 1, 2009	Dec 31, 2199
03	Eggs	Mar 1, 2009	Dec 31, 2199
05	Adult Cereal	Mar 1, 2009	Dec 31, 2199
06	Legumes	Mar 1, 2009	Dec 31, 2199
08	Fish	Mar 1, 2009	Dec 31, 2199
09	Infant Cereal	Mar 1, 2009	Dec 31, 2199
12	Infant Fruits and Vegetables	Mar 1, 2009	Dec 31, 2199
13	Infant Meats	Mar 1, 2009	Dec 31, 2199

The New Categories page is displayed.

The screenshot shows the 'Categories / New' page. It has a dark blue header with a user icon. Below the header are three sections: 'Details', 'Restrictions', and 'Date Range'. The 'Details' section has three input fields: 'Code *', 'Name *', and 'Name (Short) *'. The 'Restrictions' section has a dropdown menu labeled 'Restricted Vendor Types'. The 'Date Range' section has two date input fields: 'Begin *' and 'End *'. A 'Save' button is located at the bottom right.

2. Enter the data in the required fields for **Code**, **Name**, and **Name (short)**.
3. Use the **Restrictions** drop-down to select any restricted vendor types for the Category.

4. Select the **Begin** and **End** date range using the calendar drop-downs.
5. Click **Save**.

4.6.3 Subcategories

The Subcategories function is used to view and manage subcategories in the approved food items list. The Subcategories page is accessed through the Categories page by selecting a category, then clicking the Subcategories tab at the top of the page

Code	Name	Begin Date	End Date
000	Eggs - in Dozen Cartons	Mar 1, 2009	Dec 31, 2199
001	Fresh eggs in Dozen Cartons	Mar 1, 2009	Dec 31, 2199
002	Dry eggs (powder)	Mar 1, 2009	Dec 31, 2199
003	Shelled Eggs	Mar 1, 2009	Dec 31, 2199
004	Boiled eggs	Mar 1, 2009	Dec 31, 2199

From the Subcategories page, administrators can:

- Search for and view detailed information about a subcategory
- Add a new subcategory
- Update a subcategory
- Export subcategory information
- Export NTE prices

4.6.3.1 Viewing a Subcategory

1. Select a subcategory by clicking the **Code** link to view details for the subcategory.

Code	Name	Begin Date	End Date
000	Whole Milk	Mar 1, 2009	Dec 31, 2199
002	Whole Buttermilk	Mar 1, 2009	Dec 31, 2199
003	Whole Lactose-Red/Free Milk in 1/2 Gallons	Mar 1, 2009	Dec 31, 2199

The Subcategories Details page displays cards with Details, Categorization, Settings, Status, and Begin and End Date Range.

The screenshot shows the 'Subcategories Details' page for category 51 and subcategory 000. It features five information cards:

- Details:** Code: 000, Name: Whole Milk, Name (Short): Whole Milk.
- Categorization:** Category: 51 - Milk Whole, Unit of Measure: GAL.
- Settings:** NTE Exempt: No, RX Required: No.
- Status:** Created: Apr 3, 2009, 1:56:00 PM; Updated: Apr 19, 2021, 3:05:38 AM.
- Date Range:** Begin: Mar 1, 2009; End: Dec 31, 2199.

4.6.3.2 Adding a New Subcategory

1. To add a new subcategory, click **New Subcategory**.

The screenshot shows the 'New Subcategories' page. It has a 'Summary' and 'Subcategories' tab. The 'Subcategories' tab is active, displaying a table of existing subcategories. A 'New Subcategory' button is circled in red in the top right corner.

Code	Name	Begin Date	End Date
000	Whole Milk	Mar 1, 2009	Dec 31, 2199
002	Whole Buttermilk	Mar 1, 2009	Dec 31, 2199
003	Whole Lactose-Red/Free Milk in 1/2 Gallons	Mar 1, 2009	Dec 31, 2199
004	Whole Acidophilus Milk in 1/2 Gallons	Mar 1, 2009	Dec 31, 2199
005	Whole Goats Milk (fluid)	Mar 1, 2009	Dec 31, 2199

The New Subcategories page will be displayed.

Subcategories / New

Details

Code * Name * Name (Short) *

Categorization

Category * Unit of Measure *

Date Range

Begin * End *

Settings

NTE Default
Not to exceed (NTE), a cost containment method also known as maximum allowable reimbursement (MAR), may fall back to default prices when no calculated price is available. This setting controls what that default price should be for this subcategory. If not provided, the global default price will be used.

NTE Exempt
Not to exceed (NTE), a cost containment method also known as maximum allowable reimbursement (MAR), may not apply to certain subcategories. This setting controls whether this subcategory should be exempt or not.

RX Required
Prescriptions (RX) may be required for certain subcategories. This setting controls whether a prescription is required or not.

2. Enter the data in the required fields for **Code**, **Name**, and **Name (short)**.
3. Select the **Category** and **Unit of Measure** using the drop-downs.
4. Select the **Begin** and **End** date range using the calendar drop-downs.
5. To control the default price for the subcategory, enter the **Not-To-Exceed (NTE) Default** price for the subcategory.
6. If the subcategory should be exempt from NTE, use the toggle to enable the **NTE Exempt** setting.
7. If a prescription is required for the subcategory, use the toggle to enable the **RX Required** setting.
8. Click **Save**.

4.7 Products

In WIC Direct, products are WIC-eligible food items authorized by the State Agency. Each product has a unique Price Look Up (PLU) or Universal Product Code (UPC). UPCs are assigned to products that have bar codes such as cereal, milk, or cheese. PLUs are assigned to products that are of variable measure such as meat, seafood, fruits, and grains.

Products				
Q Search code or name		Select types	Select categories	Include inactive
Code ↑	Type	Name	Category	Subcategory
30007	PLU	Apples Alkmene	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30014	PLU	Apples Aurora/Southern Rose	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30021	PLU	Apples Cantared	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30038	PLU	Apples D'Estivale	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30045	PLU	Apples Discovery	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30052	PLU	Apples Golden Delicious Blush	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30069	PLU	Apples Ingrid Marie	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30076	PLU	Apples Lochbuie	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30083	PLU	Apples Rubinette	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30090	PLU	Apples Russet	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30106	PLU	Apples Cripps Red	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30113	PLU	Apples Worcester	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30120	PLU	Pears Abate Fetel	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30137	PLU	Pears Beurre Hardy	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30144	PLU	Pears Bon Rouge	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30151	PLU	Pears Clara Frits	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30168	PLU	Pears Concorde	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
30175	PLU	Pears Conference	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB

The Products page displays products information including: Code, Type, Name, Category, and Subcategory.

4.7.1 Searching for and Viewing a Product

1. To search for a product, enter the **code number** or the **product name**.

Products

Search code or name

Q milk

The page will populate with product results that match or contain the code or name entered.

Products				
Search code or name		Select types	Select categories	Include inactive
milk				
Code	Type	Name	Category	Subcategory
34104	PLU	Mushrooms Saffron Milk-Cap	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
934100	PLU	Mushrooms Saffron Milk-Cap	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
934107	PLU	Mushrooms Saffron Milk-Cap	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
011110401014	UPC	Kroger Whole Milk Gallon	51 - Milk Whole	001 - Whole Milk - generic
011110401212	UPC	Springdale Whole Milk	51 - Milk Whole	001 - Whole Milk - generic
011110406019	UPC	Kroger Whole Milk 1/2 Gallon	51 - Milk Whole	001 - Whole Milk - generic
011110411228	UPC	Kroger Whole Milk	51 - Milk Whole	001 - Whole Milk - generic
011110414700	UPC	Kroger 2% Milk	52 - Milk Low fat	004 - 2% Milk
011110416001	UPC	Kroger 2% Milk	52 - Milk Low fat	004 - 2% Milk
011110416506	UPC	Springdale 1% Milk	52 - Milk Low fat	003 - 1% Milk
011110416605	UPC	Kroger 1% Low Fat Milk	52 - Milk Low fat	003 - 1% Milk
011110416612	UPC	Kroger 1% Low Fat Milk	52 - Milk Low fat	003 - 1% Milk
011110417008	UPC	Kroger 2% Milk	52 - Milk Low fat	004 - 2% Milk
011110417206	UPC	Springdale 2% Milk	52 - Milk Low fat	004 - 2% Milk
011110420510	UPC	Springdale 1/2% Milk	52 - Milk Low fat	001 - Low Fat Milk - generic
011110420602	UPC	Kroger 1/2% Milk	52 - Milk Low fat	001 - Low Fat Milk - generic
011110421111	UPC	Kroger 1/2% Milk	52 - Milk Low fat	001 - Low Fat Milk - generic

The Products results displays the Code, Type, Name, Category, Subcategory, and Status for any results matching the search criteria.

Products can be filtered by Type or Category using the drop-downs.

Select types

Select categories

2. Select a product to view by clicking the **Code** link.

Products				
Search code or name		Select types	Select categories	Include inactive
milk				
Code	Type	Name	Category	Subcategory
34104	PLU	Mushrooms Saffron Milk-Cap	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
934100	PLU	Mushrooms Saffron Milk-Cap	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
934107	PLU	Mushrooms Saffron Milk-Cap	19 - Fruit & Vegetables Cash	000 - Fruit and Vegetables-CVB
011110401014	UPC	Kroger Whole Milk Gallon	51 - Milk Whole	001 - Whole Milk - generic
011110401212	UPC	Springdale Whole Milk	51 - Milk Whole	001 - Whole Milk - generic
011110406019	UPC	Kroger Whole Milk 1/2 Gallon	51 - Milk Whole	001 - Whole Milk - generic
011110411228	UPC	Kroger Whole Milk	51 - Milk Whole	001 - Whole Milk - generic
011110414700	UPC	Kroger 2% Milk	52 - Milk Low fat	004 - 2% Milk
011110416001	UPC	Kroger 2% Milk	52 - Milk Low fat	004 - 2% Milk
011110416506	UPC	Springdale 1% Milk	52 - Milk Low fat	003 - 1% Milk
011110416605	UPC	Kroger 1% Low Fat Milk	52 - Milk Low fat	003 - 1% Milk
011110416612	UPC	Kroger 1% Low Fat Milk	52 - Milk Low fat	003 - 1% Milk
011110417008	UPC	Kroger 2% Milk	52 - Milk Low fat	004 - 2% Milk
011110417206	UPC	Springdale 2% Milk	52 - Milk Low fat	004 - 2% Milk
011110420510	UPC	Springdale 1/2% Milk	52 - Milk Low fat	001 - Low Fat Milk - generic
011110420602	UPC	Kroger 1/2% Milk	52 - Milk Low fat	001 - Low Fat Milk - generic
011110421111	UPC	Kroger 1/2% Milk	52 - Milk Low fat	001 - Low Fat Milk - generic
011110422101	UPC	Kroger Sweet Acidophilus Milk	52 - Milk Low fat	007 - Acidoph Milk lowfat/skim

The Product Details page will display.

4.7.1.1 Product Details

Summary

The first page of Product Details shows a summary of information about the specific product including Details, Date Range, Current Authorizations, Status, Categorization, Flags, Sizes, and Current NTE Prices.

The screenshot shows the 'Summary' tab of the Product Details page for product 011110414700. The page is divided into several sections:

- Details:** Code: 011110414700, Type: UPC, Name: Kroger 2% Milk, Name (Short): 2% Milk 1/4 Gal.
- Date Range:** Begin: Mar 1, 2009, 12:00:00 AM, End: Dec 31, 2020, 11:59:59 PM.
- Sizes:** Exchange Size: 0.25, Package Size: 1.00.
- Current NTE Prices:** Select peer group: Peer Group 1, Effective Price: \$50.00, Global default is currently effective.
- Categorization:** Category: 02 - Milk Low fat, Subcategory: 004 - 2% Milk, Price Type: 00 - Price not disclosed, Unit of Measure: GAL.
- Flags:** Allow Broadband: Yes.
- Current Authorizations:** Sorry, no data was found.
- Status:** Created: Jul 16, 2009, 3:12:00 PM, Updated: Apr 20, 2021, 3:06:00 AM.

Authorizations

The screenshot shows the 'Authorizations' tab of the Product Details page for product 050000216673. The page displays a table of authorizations for the selected period (Apr 19, 2021 - May 19, 2021).

Account	Vendor	Original	Remaining
500001 (Normal) 1234569000000018	500105 (Formula Warehouse) Bobs Formula Warehouse #6	1.00 CONT	1.00 CONT

The Authorizations view displays the Account and card number, Vendor information, Original count, and Remaining count for the product for the specified time period. To view authorizations for a different period, use the drop-down menu to select a different period.

NTE History

1. To view the NTE History for a product, click **NTE History** at the top of the Product Details page.

Products / 011110609021 / NTE History

Summary Authorizations **NTE History**

Select time frame: This Week Select peer group: Peer Group 10 ☐ Include over variance ☐ Include below threshold ☐ Include price overrides

Calculated ↓	Over Variance	Below Threshold	Price Override	(\$ Price)
Mar 22, 2021, 2:30:52 AM	No	No	No	1.70
Mar 22, 2021, 2:30:52 AM	No	No	No	1.76

The NTE History view shows the NTE Calculated Date, Over Variance, Below Threshold, Price Override, and Price. Data on the page can be filtered by Time Frame, Peer Group, and to include over variance, below threshold, and price overrides.

4.8 Reference Data

The Reference Data page is used to view APL Types, Peer Groups, Units of Measure, and Zip Codes.

4.8.1 APL Types

Reference Data

Search number or text ☐ Include inactive View: APL Types

Number ↑	Name	Status
1	Grocery	Active
2	Commissary	Active
3	Pharmacy	Active
4	Farmer	Active

The APL Types view of Reference Data displays the Number, Name, and Status for each APL Type. APL Types can be searched for by entering the **number** or **text** in the search field. Additionally, APL Types can be sorted in ascending or descending order by clicking the arrow next to the Number column heading.

4.8.2 Peer Groups

Reference Data				
<input type="text" value="Search number or text"/>			<input type="checkbox"/> Include inactive	
Number ↑	Name	Name (Short)	NTE Exempt	Status
1	Peer Group 1	Peer Group 1	No	Active
2	Peer Group 2	Peer Group 2	No	Active
3	Peer Group 3	Peer Group 3	No	Active
4	Peer Group 4	Peer Group 4	No	Active
5	Peer Group 5	Peer Group 5	No	Active
6	Peer Group 6	Peer Group 6	No	Active
7	Peer Group 7	Peer Group 7	No	Active
8	Peer Group 8	Peer Group 8	No	Active
9	Peer Group 9	Peer Group 9	No	Active
10	Peer Group 10	Peer Group 10	No	Active
11	Peer Group 11	Peer Group 11	No	Active
12	Peer Group 12	Peer Group 12	No	Active
13	Peer Group 13	Peer Group 13	No	Active
14	Peer Group 14	Peer Group 14	No	Active

The Peer Groups view of Reference Data displays the Number, Name, Name (Short), NTE Exempt, and Status for each peer group.

4.8.3 Units of Measure

Reference Data			
<input type="text" value="Search number or text"/>			<input type="checkbox"/> Include inactive
Number ↑	Name	Name (Short)	Status
3	OZ	OZ	Active
4	QT	QT	Active
5	LB	LB	Active
6	DOZ	DOZ	Active
10	\$\$\$	\$\$\$	Active
12	GAL	GAL	Active
41	CONT	CONT	Active

The Units of Measure view of Reference Data displays the Number, Name, Name (Short), and Status for each unit of measure.

4.8.4 Zip Codes

Reference Data				
<input type="text" value="Search number or text"/>			<input type="checkbox"/> Include inactive	
Number ↑	City	State	Time Zone	Status
00501	Holtsville	NY	UTC-5 (Observes DST)	Active
00544	Holtsville	NY	UTC-5 (Observes DST)	Active
00601	Adjuntas	PR	UTC-4	Active
00602	Aguada	PR	UTC-4	Active
00603	Aguadilla	PR	UTC-4	Active
00604	Aguadilla	PR	UTC-4	Active
00605	Aguadilla	PR	UTC-4	Active
00606	Maricao	PR	UTC-4	Active
00610	Anasco	PR	UTC-4	Active
00611	Angeles	PR	UTC-4	Active

The ZIP Codes view of Reference data displays the Number, City, State, Time Zone, and Status for each ZIP Code.

4.9 History

4.9.1 Account View of History

The Account view of History page is used to review transactions impacting an account. The top portion of the page is used to search for and filter the list of transactions displayed by Account Number, Card Number, Time frame, and Type.

Number	Received	Type	Account	Status
173	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500038 (Normal) 1234569000000384	000 - Approved.
172	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500040 (Normal) 1234569000000406	000 - Approved.
171	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500040 (Normal) 1234569000000406	000 - Approved.
170	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500040 (Normal) 1234569000000406	000 - Approved.
169	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500040 (Normal) 1234569000000406	000 - Approved.
168	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500040 (Normal) 1234569000000406	000 - Approved.
167	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500040 (Normal) 1234569000000406	000 - Approved.
166	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500040 (Normal) 1234569000000406	000 - Approved.
165	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500039 (Normal) 1234569000000398	000 - Approved.
164	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500040 (Normal) 1234569000000406	000 - Approved.
163	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500039 (Normal) 1234569000000398	000 - Approved.
162	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500038 (Normal) 1234569000000380	000 - Approved.
161	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500040 (Normal) 1234569000000406	000 - Approved.
160	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500039 (Normal) 1234569000000398	000 - Approved.
159	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500038 (Normal) 1234569000000380	000 - Approved.
158	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500040 (Normal) 1234569000000406	000 - Approved.
157	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500039 (Normal) 1234569000000398	000 - Approved.
156	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	500038 (Normal) 1234569000000380	000 - Approved.

The information related to an account transaction includes:

- **Number (Host Generated):** The unique trace number assigned to a transaction by WIC Direct
- **Received:** Date and time the transaction was received
- **Type:** The type of transaction (Add Account, Add Cardholder, Adjust Benefits, etc.)
- **Status:** Indicates whether the transaction was approved or failed

The sort order for Number and Received can be changed to ascending or descending by clicking the respective heading.

4.9.2 Financial View of History

The Financial view of History page is used to view any transactions with financial settlement.

1. To access the Financial History page from Account view of History, click the **View** drop-down in the top right of the page and select Financial.

The screenshot displays the 'History' page in the WIC Direct System. At the top left, there is a sidebar with a 'View: Financial' button and a dropdown menu showing 'Account', 'Financial' (selected), 'Retail', and 'Network'. The main content area is titled 'History' and features a search bar with filters for 'Enter account number', 'Enter card number', and 'Enter vendor number'. Below the search bar, there are buttons for 'Select types', 'Today', and navigation arrows. The table below shows a list of transactions with the following columns: Number, Received, Type, Account, Vendor, Settled, and Paid (\$).

Number	Received	Type	Account	Vendor	Settled	Paid (\$)
184	Apr 19, 2021, 3:08:14 AM	Purchase Request	500015 (Normal) 1234569000000158	500117 Supervalu Warehouse #18	Apr 19, 2021	+22.85
180	Apr 19, 2021, 3:08:14 AM	Purchase Request	500048 (Normal) 1234569000000489	500119 Boat Grocery #20	Apr 19, 2021	+9.46
183	Apr 19, 2021, 3:08:14 AM	Purchase Request	500004 (Normal) 1234569000000402	500102 Country Fair Store #3	Apr 19, 2021	+102.18
179	Apr 19, 2021, 3:08:14 AM	Purchase Request	500011 (Normal) 1234569000000117	500118 Montega Limited #19	Apr 19, 2021	+12.00
181	Apr 19, 2021, 3:08:14 AM	Purchase Request	500021 (Normal) 1234569000000018	500101 Caseys Food Stores #2	Apr 19, 2021	+2.85
178	Apr 19, 2021, 3:08:14 AM	Purchase Request	500048 (Normal) 1234569000000489	500119 Boat Grocery #20	Apr 19, 2021	+1.00

Financial History displays the transaction number, date and time received, transaction type, account and card numbers, vendor information, settled date, and amount paid.

Search results can be narrowed by entering a specific account number, card number, vendor number, filtering by types, or selecting a date using the filters at the top of the page.

4.9.3 Retail View of History

The Retail view of History page shows any transactions impacting a retailer.

1. To access the Retail view of History page from Account view of History, click the **View** drop-down in the top right of the page and select **Retail**.

History

Enter account number

Enter card number

Enter vendor name or number

Select types

Today

Include failed

View: Retail

Number	Received	Type	Account	Vendor	Status
179	Apr 12, 2021, 1:58:36 PM	Purchase Request	500011 (Normal) 1234569000000117	500118 Owens Country Mart #19	000 - Approved.
180	Apr 12, 2021, 1:58:36 PM	Purchase Request	500048 (Normal) 1234569000000489	500119 Owens Country Mart #20	000 - Approved.
184	Apr 12, 2021, 1:58:36 PM	Balance Inquiry	500001 (Normal) 1234569000000018	500119 Owens Country Mart #20	000 - Approved.
183	Apr 12, 2021, 1:58:36 PM	Purchase Request	500001 (Normal) 1234569000000018	500101 Millers Food Market #2	000 - Approved.
182	Apr 12, 2021, 1:58:36 PM	Purchase Request	500015 (Normal) 1234569000000158	500117 Market Basket Food Stores #18	000 - Approved.
181	Apr 12, 2021, 1:58:36 PM	Purchase Request	500004 (Normal) 1234569000000042	500102 Marys Food Coop #3	000 - Approved.
177	Apr 12, 2021, 1:58:36 PM	Purchase Request	500048 (Normal) 1234569000000489	500119 Owens Country Mart #20	000 - Approved.

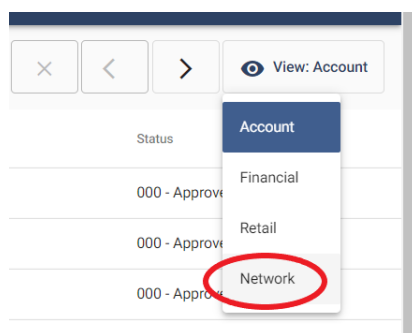
The Retail view of History shows the retail transaction number, the date and time received, the transaction type, the account and card number used during the transaction, vendor/retailer information, and the status of the transaction.

Search results can be narrowed by entering a specific account number, card number, vendor name or number, filtering by types, or selecting a date using the filters at the top of the page.

4.9.4 Network View of History

The Network view of History page shows all transactions.

1. To access the Network view of History from Account view of History, click the View drop-down in the top right of the page and select **Network**.





History					
Select time frame Today		Select types	Include failed		View: Network
Number	Received ↓	Type	Source	Process Time	Status
173	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
172	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
171	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
170	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
169	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
168	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
167	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
166	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
165	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
164	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
163	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
162	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
161	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
160	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
159	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
158	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.
157	Dec 17, 2020, 3:02:58 AM	Adjust Benefits	WIC Direct	0 ms	000 - Approved.


The Network view of History shows the transaction Number, Received Date/Time, Type, Source, Process Time, and Status.


4.9.5 Transaction Details


From the any view of History, the details for a specific transaction can be viewed by clicking the transaction number link corresponding to a transaction.


History 


 Enter account number


 Enter card number


 Enter vendor name or number


Select types 


 Today



 Include failed







 View: Retail

Number	Received ↓	Type	Account	Vendor	Status
179	Apr 12, 2021, 1:58:36 PM	Purchase Request	500011 (Normal)  1234569000000117	500118 Owens Country Mart #19	000 - Approved.
180	Apr 12, 2021, 1:58:36 PM	Purchase Request	500048 (Normal)  1234569000000489	500119 Owens Country Mart #20	000 - Approved.

The Transaction Details page will be displayed.

History / 183

Details

Number (Host Generated): 183
 Number (Systems Trace Audit): 000000
 Number (Retrieval Reference): 123456789123
 Type: Purchase Request
 Function: 200 - Purchase Request

Account

Number: [500001](#)
 Number (Card): [12345690000000018](#)
 Type: Normal

Totals

Products Requested: 1
 Products Approved: 1
 Amount Requested: \$2.85
 NTE Adjustments: \$0.00
 Recoupment: \$0.00
 Amount Approved: \$2.85
 Discount: \$0.00
 Settled Price: \$2.85

Date/Time

Received: Apr 12, 2021, 1:58:36 PM
 Transmission: Apr 7, 2021, 3:00:00 AM
 Local: Apr 7, 2021, 7:00:00 AM

Vendor

Number (MIS): [500101](#)
 Number (X9): 2
 Name: Millers Food Market #2
 Card Acceptor Code: EBTDEV
 Card Acceptor Terminal: EBTDEV

Status

Status: 000 - Approved.

Settlement

Settlement Status: Not Settled
 Settlement Date: Apr 13, 2021
 Reversal Status: OK
 Matching Status: Unmatched

The Transactions Details page shows cards displaying the Details, Account information, Totals, Date/Time of the transaction, Vendor information, Status, and Settlement details.

4.10 Settlement

The Settlement function is used to validate the financial integrity of WIC Direct, detect problems, initiate problem resolution procedures, and view detailed financial data. WIC Direct generates automated alerts to notify appropriate staff when a problem is detected. The process of financial reconciliation ensures that external entities receive correct payments for approved transactions in WIC Direct.

Settlement

Enter month and year
 02/2021

Settled ↓	By WIC Direct (\$)	Outside WIC Direct (\$)	Total (\$)
Feb 22, 2021	+9,214.18	+183,607.53	+192,821.71
Feb 21, 2021	+11,805.10	+189,656.51	+201,461.61
Feb 20, 2021	+11,121.50	+184,706.28	+195,827.78
Feb 19, 2021	+7,816.59	+161,683.91	+169,500.50
Feb 18, 2021	+9,003.23	+133,040.95	+142,044.18
Feb 17, 2021	+6,589.99	+182,386.84	+188,976.83
Feb 16, 2021	+7,742.54	+89,294.79	+97,037.33
Feb 15, 2021	+7,416.91	+145,344.05	+152,760.96
Feb 14, 2021	+11,663.60	+246,693.87	+258,357.47
Feb 13, 2021	+10,142.75	+220,987.53	+231,130.28
Feb 12, 2021	+8,048.98	+154,785.80	+162,834.78
Feb 11, 2021	+11,745.30	+113,078.66	+124,823.96

1. To view settlement data, enter the **month** and **year** in the date field or use the calendar to select the month and year to view financial data for. The current month will be displayed by default.

The Settlement page displays the Settled Date, the settlement amount by WIC Direct, the settlement amount outside WIC Direct, and the total for each day. The Settled column can be sorted by earliest date by clicking the column header.

4.11 File Events

The File Events page shows the file Number, Sent/Received Date/Time, Type, Name, Path, and Status.

File Events					
<input type="text" value="Search name or path"/>		Select types ▼	Today	<input type="checkbox"/> Include failed	<input type="button" value="X"/> <input type="button" value="◀"/> <input type="button" value="▶"/>
Number	Sent/Received ↓	Type	Name	Path	Status
188	Apr 14, 2021, 3:09:51 AM	Compressed/Archive File	11040600_APL_04b.zip	LAB-APLDEV	Success
187	Apr 14, 2021, 3:09:51 AM	Approved Product List File	11040600_04b.apl	LAB-APLDEV	Success
186	Apr 14, 2021, 3:09:51 AM	Compressed/Archive File	11040600_APL_04b.zip	LAB-m16\Outbox	Success
185	Apr 14, 2021, 3:09:51 AM	Approved Product List File	11040600_04b.apl	LAB-m16\Outbox	Success
184	Apr 14, 2021, 3:09:51 AM	Compressed/Archive File	11040600_APL_04b.zip	LAB-m15\Outbox	Success
183	Apr 14, 2021, 3:09:50 AM	Approved Product List File	11040600_04b.apl	LAB-m15\Outbox	Success
182	Apr 14, 2021, 3:09:50 AM	Compressed/Archive File	11040600_APL_04b.zip	LAB-m14\Outbox	Success
181	Apr 14, 2021, 3:09:50 AM	Approved Product List File	11040600_04b.apl	LAB-m14\Outbox	Success
180	Apr 14, 2021, 3:09:50 AM	Compressed/Archive File	11040600_APL_04b.zip	LAB-m13\Outbox	Success
179	Apr 14, 2021, 3:09:50 AM	Approved Product List File	11040600_04b.apl	LAB-m13\Outbox	Success
178	Apr 14, 2021, 3:09:50 AM	Compressed/Archive File	11040600_APL_04b.zip	LAB-m12\Outbox	Success
177	Apr 14, 2021, 3:09:50 AM	Approved Product List File	11040600_04b.apl	LAB-m12\Outbox	Success

Details can be viewed for a particular file by clicking a file **Number** link.

File Events					
<input type="text" value="Search name or path"/>		Select types ▼	Today	<input type="checkbox"/> Include failed	<input type="button" value="X"/> <input type="button" value="◀"/> <input type="button" value="▶"/>
Number	Sent/Received ↓	Type	Name	Path	Status
188	Apr 14, 2021, 3:09:51 AM	Compressed/Archive File	11040600_APL_04b.zip	LAB-APLDEV	Success
187	Apr 14, 2021, 3:09:51 AM	Approved Product List File	11040600_04b.apl	LAB-APLDEV	Success
186	Apr 14, 2021, 3:09:51 AM	Compressed/Archive File	11040600_APL_04b.zip	LAB-m16\Outbox	Success

The details for the file will display.

The screenshot shows the 'File Events / 187' page. It contains three main sections: 'Details', 'File', and 'Status'. The 'Details' section shows 'Number: 187' and 'Sent/Received: Apr 14, 2021, 3:09:51 AM'. The 'File' section shows 'Name: 11040600_04b.apl', 'Path: LAB-APLDEV', 'Size: 2.38 MB', and a 'Download File' button. The 'Status' section shows 'Process Time: 906 ms', 'Status: Success', and 'Audit: Delivered'.

The File Events Details page shows the number, sent/received date and time, file name, path, size, process time, status, and audit status.

The file can be downloaded by clicking **Download File**.

4.12 Jobs

There are many scheduled jobs, i.e., one or more related processes that run on a schedule, in WIC Direct. Some jobs generate files (e.g., APL). Other jobs perform functions (e.g., benefit expungement, retail settlement) that are crucial to WIC Direct operations. The Jobs page is used to manage and monitor all WIC Direct jobs.

The screenshot shows the 'Jobs' page with a search bar and filters. Below is a table of jobs:

Name	State	Schedule	Next Run	Status
Activate/Deactivate Dated Items	Stopped	Runs Every 24 Hours	Dec 16, 2020, 10:30:00 PM	Active
Approved Product List Files	Stopped	Runs Every 24 Hours	Dec 18, 2020, 1:00:00 AM	Active
Auto-Reconciliation Files	Stopped	Runs Every 24 Hours	Dec 17, 2020, 11:30:00 PM	Active
Bank Reconciliation	Stopped	Runs Every 24 Hours	Dec 17, 2020, 7:00:00 AM	Active
Benefit Expungement	Stopped	Runs Every 24 Hours	Dec 18, 2020, 3:00:00 AM	Active
Card Orders	Stopped	Runs Every 24 Hours	Dec 17, 2020, 3:30:00 AM	Active
Case Month Billing	Stopped	Runs Every 1 Months	Jan 1, 2021, 12:30:00 AM	Active
Daily Adjust Benefits Activity	Stopped	Runs Every 24 Hours	Dec 16, 2020, 11:15:00 PM	Active
Daily Card Change Activity	Stopped	Runs Every 24 Hours	Dec 17, 2020, 5:15:00 AM	Active
Daily Supplemental Files	Stopped	Runs Every 24 Hours	Dec 17, 2020, 2:30:00 AM	Active
Daily Vendor Operational Activations	Stopped	Runs Every 24 Hours	Dec 16, 2020, 11:30:00 PM	Active
Direct Connect Reconciliation	Stopped	Runs Every 24 Hours	Dec 18, 2020, 12:30:00 AM	Active
File Handler		Runs	Dec 17, 2020, 7:00:00 PM	Active
Gateway Reconciliation	Stopped	Runs Every 24 Hours	Dec 17, 2020, 11:15:00 PM	Active
Hot Card List Files	Stopped	Runs Every 24 Hours	Dec 16, 2020, 7:15:00 PM	Active
Monthly Reconciliation	Stopped	Runs First Any Day	Dec 18, 2020, 12:00:00 AM	Active
NTE Computation	Stopped	Runs Every Monday	Dec 18, 2020, 2:00:00 AM	Active
Purge State Data	Stopped	Runs Every 24 Hours	Dec 17, 2020, 1:30:00 AM	Active

The Jobs page displays a list of all WIC Direct jobs and their status. Information displayed for each job includes:

- **Name:** Name of the job
- **State:** Status of the job.
- **[Hold]:** There is an issue with the job, impeding its processing

- **[Waiting]:** Job is prepared to run at the next scheduled time
- **[Running]:** Job is currently running
- **[Initialized]:** Job is configured and prepared to start
- **[Starting]:** Job is starting
- **[Manual Start]:** Job was started manually
- **[Stopping]:** Job is in the process of stopping
- **[Stopped]:** Job is currently stopped
- **[Manual Stop]:** Job was stopped manually
- **[Successful]:** Job was completed successfully
- **[Failed]:** Job was unsuccessful/could not be completed
- **[Usable]:**
 - **Schedule:** Schedule of when the job runs
 - **Next Run:** When the next job is scheduled to run
 - **Status:** Indicates whether the job is active or inactive

4.12.1 Job Details

The details for any job can be viewed by clicking the job **Name**. In the example below, Case Month Billing is selected.

Jobs				
<input type="text" value="Search name"/>			Select states ▼	<input type="checkbox"/> Include inactive
Name ↑	State	Schedule	Next Run	Status
Activate/Deactivate Dated Items	Stopped	Runs Every 24 Hours	Dec 16, 2020, 10:30:00 PM	Active
Approved Product List Files	Stopped	Runs Every 24 Hours	Dec 18, 2020, 1:00:00 AM	Active
Auto-Reconciliation Files	Stopped	Runs Every 24 Hours	Dec 17, 2020, 11:30:00 PM	Active
Bank Reconciliation	Stopped	Runs Every 24 Hours	Dec 17, 2020, 7:00:00 AM	Active
Benefit Exemption	Stopped	Runs Every 24 Hours	Dec 18, 2020, 3:00:00 AM	Active
Card Orders	Stopped	Runs Every 24 Hours	Dec 17, 2020, 3:30:00 AM	Active
Case Month Billing	Stopped	Runs Every 1 Months	Jan 1, 2021, 12:30:00 AM	Active
Daily Adjust Benefits Activity	Stopped	Runs Every 24 Hours	Dec 16, 2020, 11:15:00 PM	Active
Daily Card Change Activity	Stopped	Runs Every 24 Hours	Dec 17, 2020, 5:15:00 AM	Active

The Job Details page for Case Month Billing will display.

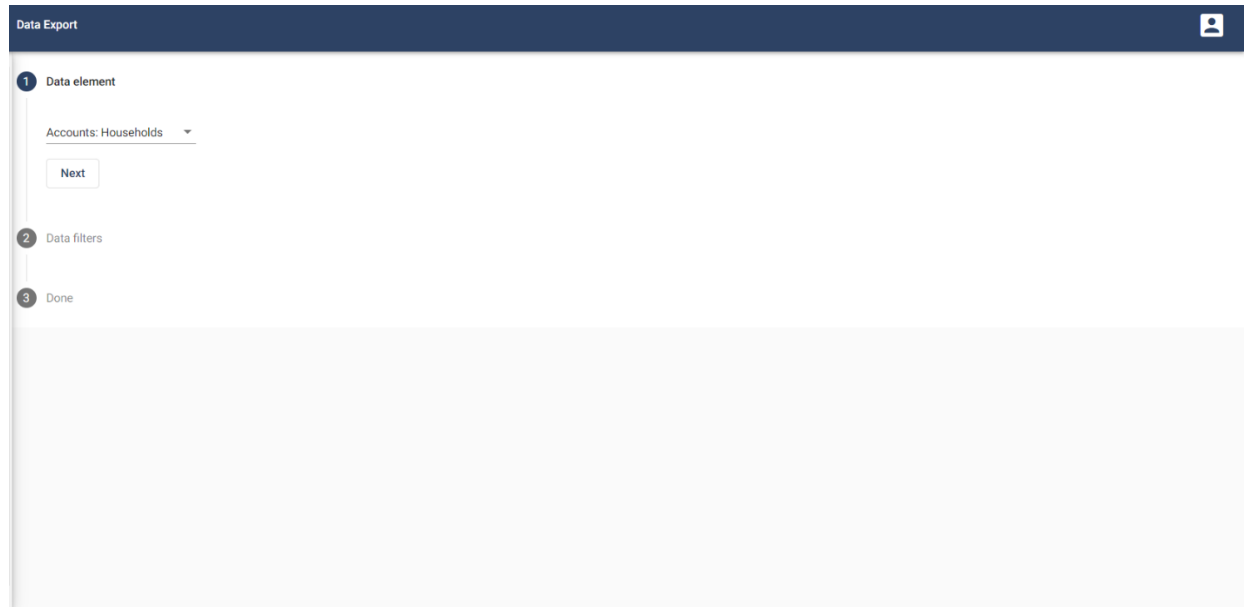
Jobs / Case Month Billing			
Details Name: Case Month Billing State: Stopped	Schedule Schedule: Runs Every 1 Months Next Run: Feb 1, 2021, 12:30:00 AM	Settings Auto Restart: No Catch Up: Yes	Status Status: Active Created: Jan 8, 2021, 3:05:13 AM Updated: Jan 8, 2021, 3:05:18 AM Deactivate

The Job Details page for the selected job displays the job Name, State, Schedule, Settings, and Status.

A job can be deactivated by clicking **Deactivate**.

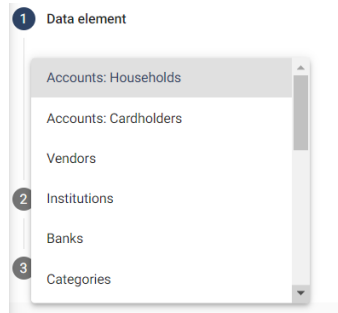
4.13 Data Export

The Data Export function is used to select data and export to the user for download.



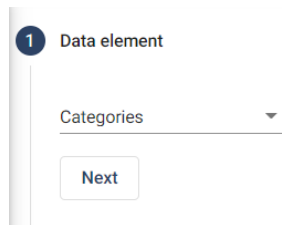
The screenshot shows the 'Data Export' interface. At the top, there is a dark blue header with the text 'Data Export' and a user profile icon. Below the header, a vertical sidebar on the left contains three steps: '1 Data element', '2 Data filters', and '3 Done'. The main area of the interface is currently empty, showing only the first step's content. In the 'Data element' step, there is a dropdown menu labeled 'Accounts: Households' and a 'Next' button below it.

1. Select a **data element** using the drop-down.



This screenshot shows the 'Data element' dropdown menu open. The menu lists several options: 'Accounts: Households', 'Accounts: Cardholders', 'Vendors', 'Institutions', 'Banks', and 'Categories'. The 'Accounts: Households' option is currently selected. The sidebar on the left shows steps '1 Data element', '2 Institutions', and '3 Categories'.

2. Click **Next**.



This screenshot shows the 'Data Export' interface after the 'Categories' option has been selected from the dropdown. The dropdown now displays 'Categories'. The 'Next' button is still visible below the dropdown. The sidebar on the left shows steps '1 Data element', '2 Institutions', and '3 Categories'.

3. Enter **data filters**. In the case where Categories was selected as the data element, a search can be performed for code or name. This field will be different depending on the data element type selected.

2 Data filters

Search code or name

Back Next

Include inactive

4. Click **Next**.

Data Export

1 Data element

2 Data filters

3 Done

We are gathering your selected data for export and will email when it is ready for download.

Reset

5. Once data filters have been entered the system will gather the selected data for export and email the user when the export is ready for download.

6. To reset the filters and start the process over, click **Reset**.

4.14 Settings

The Settings page allows the user to control settings pertaining to Accounts, Cardholders, Redemptions, Cost Containment, Data Retention, Interfaces, and Files by selecting the appropriate tab at the top of the page.

4.14.1 Account Settings

Settings / Accounts

Accounts Cardholders Redemptions Cost Containment Data Retention Interfaces Files

Maximum Cardholders Per Account

Accounts may contain one or more active cardholders. This setting controls the maximum number of active cardholders allowed. When set to 0, no maximum value is enforced. Offline processing modes, however, require that the maximum value remain at 1.

1

Benefit Expungement Period

Benefits may remain unutilized after the benefit end date has been reached. This setting controls how many days those unutilized benefit quantities should remain before the benefit expungement process voids the remainder. When set to 0, the benefit expungement process will void benefit quantities that have just expired the next time it runs.

7

Case Month Billing Calculation Type

Case month billing counts may be calculated using different methods. This setting controls which method is used for calculation:

- By Begin Date (Enhanced): This method is the default for all new agencies. For the current month, this method will include a distinct count of accounts that were issued a benefit with a begin date within that month, where that issuance was received between the first of the month at 12:00 AM UTC and the last of the month at 11:59 PM UTC. For the prior month, this method will also include an adjustment based on a distinct count of accounts that were issued a benefit with a begin date within that month, where the issuance was received after the last of the month.
- By Begin Date: This method is deprecated but still supported for some agencies. This method is the same as the By Begin Date (Enhanced) method, except that it does not include an adjustment for the prior month.
- By End Date: This method is deprecated but still supported for some agencies. This method is the same as the By Begin Date method, except that counts are based on benefit end dates.

☒ By Begin Date (Enhanced)
☐ By Begin Date
☐ By End Date

Case Month Billing Calculation Includes Voided

Case month billing count calculations may include accounts whose benefits for the month were fully voided before being utilized. This setting controls whether those accounts are included or not.

Save

The Accounts Settings page displays the following configurable settings:

- Maximum Cardholders Per Account controls the maximum number of active cardholders allowed.
- Benefit Expungement Period controls how many days unutilized benefit quantities should remain before the benefit expungement process voids the remainder.
- Case Month Billing Calculation Type controls which date method is used for calculation.
- Case Month Billing Calculation Includes Voided controls whether accounts whose benefits for the month were fully voided are included in the calculation.

4.14.2 Cardholders Settings

Settings / Cardholders

Accounts **Cardholders** Endorsements Card Commitment Data Retention Interfaces Files

Issuer Identification Number
The issuer identification number (IIN), sometimes referred to as the bank identification number (BIN), is the leading six or eight digits of the card number. The digits identify the card issuing institution that issued the card to the cardholder.

123456

Card Number Length
The card number, also known as the primary account number (PAN), is the card identifier found on the cards issued by the card issuing institution. These identifiers will be either 16 or 19 digits in length.

16 digits
19 digits

Card Image Update Timeframe
When cards are presented, transaction history is examined to determine the updates that still need to be applied to the card image. This setting controls the number of days of history to consider when retrieving relevant transaction history. This setting is only utilized in Offline processing modes.

120

Card Replacement Timeframe
This setting controls the number of days from the time of card deactivation before a replacement card is allowed. This setting is only utilized in Offline processing modes.

5

Personal Identification Number Change Timeframe
This setting controls the number of minutes from the time a card becomes PIN locked until a PIN change is allowed. This setting is only utilized in Offline processing modes.

15

Personal Identification Number Attempts Allowed
Defines the maximum number of PIN attempts before a card will be PIN locked. When set to 0, no maximum value is enforced. This setting is only utilized in Online processing mode.

4

Personal Identification Number Reset Time
PIN locked cards may be automatically unlocked by a successful PIN entry if that PIN entry occurs after a set time. This setting controls the reset time, expressed in Coordinated Universal Time (UTC), that PIN entry transactions are compared against. This setting is only utilized in Online processing mode.

12:00 AM

Personal Identification Number Unlocked on Change
This setting controls whether a PIN change should also automatically unlock a PIN locked card. This setting is only utilized in Online processing mode.

Save

The Cardholders Settings page displays the following configurable settings:

- Issuer Identification Number (IIN), or Bank Identification Number (BIN), is the leading six or eight digits of the card number that identifies the card issuing institution.
- Card Number (or Primary Account Number) Length sets the card identifier to 16 or 19 digits in length.
- Card Image Update Timeframe controls the number of days of history to consider when retrieving relevant transaction history. This setting is only utilized in offline processing modes. Card Replacement Timeframe controls the number of days from the time of card deactivation before a replacement card is allowed. This setting is only utilized in offline processing modes.
- Personal Identification Number Change Timeframe controls the number of minutes from the time a card becomes PIN locked until a PIN change is allowed. This setting is only utilized in offline processing modes.

- Personal Identification Number Attempts Allowed defines the maximum number of PIN attempts before a card will be PIN locked. This setting is only utilized in online processing mode.
- Personal Identification Number Reset Time controls the reset time expressed in Coordinated Universal Time (UTC) that PIN transactions are compared against. This setting is only utilized in online processing mode.

4.14.3 Redemptions Settings

Accounts	Cardholders	Redemptions	Cost Containment	Data Retention	Interfaces	Files
Reversal/Void Period This setting controls the number of days after a purchase in which a vendor is still allowed to submit a reversal/void. This setting is only utilized in Online processing mode. <input type="text" value="120"/>						
Allowed Transaction Age This setting controls the number of days in the past that a transaction can have occurred to still successfully process. When set to 0, no maximum value is enforced. This setting is only utilized in Offline processing modes. <input type="text" value="2"/>						
Duplicate Signature Period This setting controls the number of days of history to consider when determining if a transaction signature is a duplicate or not. When set to 0, no maximum value is enforced. This setting is only utilized in Offline processing modes. <input type="text" value="60"/>						
Hot Card Grace Period This setting controls the number of grace days to account for when determining if a card was on the hot card list when a transaction was completed. When set to 0, no maximum value is enforced. This setting is only utilized in Offline processing modes. <input type="text" value="3"/>						
Product Grace Period This setting controls the number of grace days between a product end date and a configurable amount of time before a product is considered out of date. When set to 0, no maximum value is enforced. This setting is only utilized in Offline processing modes. <input type="text" value="3"/>						

The Redemptions Settings page displays the following configurable settings:

- Reversal/Void Period controls the number of days after a purchase in which a vendor is allowed to submit a reversal/void. This setting is only utilized in online processing mode.
- Allowed Transaction Age controls the number of days in the past that a transaction can have occurred to still successfully process. This setting is utilized in offline processing modes.
- Duplicate Signature Period controls the number of days of history to consider when determining if a transaction signature is a duplicate or not. This setting is only utilized in offline processing modes.
- Hot Card Grace Period controls the number of grace days to account for when determining if a card was on the hot card list when a transaction was completed. This setting is only utilized in offline processing modes.
- Product Grace Period controls the number of grace days between a product end date and a configurable amount of time before a product is considered out of date. This setting is only utilized in offline processing modes.

4.14.4 Cost Containment Settings

Settings / **Cost Containment**

Calculation Period
This setting controls the number of days of historical data used to calculate cost containment prices.

Global Default Price
This setting controls the global default cost containment price applied when no usable calculated value is available.

Application Level
This setting controls the level at which cost containment is calculated:

- Product: This option generates product-level calculations based on historical product and subcategory prices.
- Subcategory: This option generates product-level calculations based on historical subcategory prices only.

Product Redemption Threshold
This setting controls the number of product redemptions needed for a newly calculated price to be flagged as valid. This setting is utilized when the application level is set to Product.

Product Tolerance Percentage
This setting controls the maximum amount of change (as a percentage of the previous valid price) that a newly calculated price cannot exceed without being flagged as valid. This setting is utilized when using the Product Application Level.

Product Standard Deviations
This setting controls the number of standard deviations added to the mean product price to obtain a new calculation. This setting is utilized when using the Product Application Level.

Product Increase Percentage
This setting controls the percentage to be added to the mean product price to obtain a new calculation. This setting is utilized when using the Product Application Level.

Subcategory Redemption Threshold
This setting controls the number of subcategory redemptions needed for a newly calculated price to be flagged as valid. This setting is utilized when the application level is set to Subcategory.

Subcategory Tolerance Percentage
This setting controls the maximum amount of change (as a percentage of the previous valid price) that a newly calculated price cannot exceed without being flagged as valid. This setting is utilized when using the Subcategory Application Level.

Subcategory Standard Deviations
This setting controls the number of standard deviations added to the mean subcategory price to obtain a new calculation. This setting is utilized when using the Subcategory Application Level.

Subcategory Increase Percentage
This setting controls the percentage to be added to the mean subcategory price to obtain a new calculation. This setting is utilized when using the Subcategory Application Level.

The Cost Containment Settings page displays the following configurable settings:

- **Calculation Period** controls the number of days of historical data used to calculate cost containment prices.
- **Global Default Price** controls the global default cost containment price applied when no usable calculated value is available.
- **Application Level** controls the level at which cost containment is calculated:
 - **Product:** this option generates product-level calculations based on historical product and subcategory prices.
 - **Subcategory:** this option generates product-level calculations based on historical subcategory prices only.
- **Product Redemption Threshold** controls the number of product redemptions needed for a newly calculated price to be flagged as valid. This setting is only utilized when the Application Level is set to Product.
- **Product Tolerance Percentage** controls the maximum amount of change (as a percentage of the previous valid price) that a newly calculated price cannot exceed without being flagged as valid. This setting is utilized when using the Product Application Level.
- **Product Standard Deviations** controls the number of standard deviations added to the mean product price to obtain a new calculation. This setting is utilized when using the Product Application Level.
- **Product Increase Percentage** controls the percentage to be added to the mean product price to obtain a new calculation. This setting is utilized when using the Product Application Level.

- Subcategory Redemption Threshold controls the number of subcategory redemptions needed for a newly calculated price to be flagged as valid. This setting is utilized by both Application Levels.
- Subcategory Tolerance Percentage controls the maximum amount of change (as a percentage of the previous valid price) that a newly calculated price cannot exceed without being flagged as valid. This setting is utilized by both Application Levels.
- Subcategory Standard Deviations controls the number of standard deviations added to the mean subcategory price to obtain a new calculation. This setting is utilized by both Application Levels.
- Subcategory Increase Percentage controls the percentage to be added to the mean subcategory price to obtain a new calculation. This setting is utilized by both Application Levels.

4.14.5 Data Retention Settings

Settings / Data Retention

Accounts Cardholders Redemptions Cost Containment **Data Retention** Interfaces Files

Application Logging Retention Period
System-generated logs are constantly recorded to provide valuable information to assist with identifying any system issues that might occur. This setting controls the number of days that these logs will be retained.

30

System Balancing Retention Period
Checkpoint data is generated during system balancing. This setting controls the number of days that these checkpoints will be retained.

120

System Token Retention Period
Some legacy system APIs include an authentication scheme that exchanges system credentials for short-lived access tokens that are then stored for re-use. This setting controls the number of days that these tokens will be retained.

7

Unique Transaction Number Retention Period
Some system APIs accept a unique transaction number that helps to ensure transactions are not duplicated. This setting controls the number of days that these unique transaction numbers will be retained.

120

Control Number Retention Period
Some system APIs allow for PIN change operations to be completed as a two-step process:
 • First, a card number is exchanged for a random control number generated and stored by the system.
 • Next, the control number is sent along with an encrypted PIN block to the system to finalize the PIN change.
 If an integrator does not complete this process, then control numbers may be retained in the system. This setting controls the number of days that these control numbers will be retained. This setting is only utilized in Online processing mode.

1

Network Handshake Retention Period
Some system APIs allow for a handshake transaction to be initiated. This setting controls the number of days that these transactions will be retained. This setting is only utilized in Online processing mode.

90

Network Sign On Retention Period
Some system APIs allow for a sign on transaction to be initiated. This setting controls the number of days that these transactions will be retained. This setting is only utilized in Online processing mode.

90

Network Sign Off Retention Period
Some system APIs allow for a sign off transaction to be initiated. This setting controls the number of days that these transactions will be retained. This setting is only utilized in Online processing mode.

90

Save

The Data Retention Settings page displays the following configurable settings:

- Application Logging Retention Period controls the number of days the application logs will be retained.
- System Balancing Retention Period controls the number of days that the system balancing checkpoints will be retained.
- System Token Retention Period controls the number of days that the tokens generated by some legacy system APIs will be retained.
- Unique Transaction Number Retention Period controls the number of days that the unique transaction numbers (that help to ensure transactions are not duplicated) will be retained.

- Control Number Retention Period controls the number of days that control numbers will be retained. This setting is only utilized in Online processing mode.
- Network Handshake Redemption Period controls the number of days that network handshake transactions will be retained. This setting is only utilized in Online processing mode.
- Network Sign On Retention Period controls the number of days that sign on transactions will be retained. This setting is only utilized in Online processing mode.
- Network Sign Off Retention Period controls the number of days that sign off transactions will be retained. This setting is only utilized in Online processing mode.

4.14.6 Interface Settings

Settings / Interfaces

AccountsCardholdersRedemptionsCost ContainmentData RetentionInterfacesFiles

PLU Check Digit Required
Some system APIs may allow PLUs to be presented without check digits. This setting controls whether those check digits should be required or not.

☒

Validate Unique Benefit ID
Some system APIs may allow unique benefit IDs to be re-used across requests. This setting controls whether those unique benefit IDs are validated as unique or not.

☐

Return Zero Balance
Some system APIs allow for benefit balances to be returned. This setting controls whether benefits with zero remaining balance will be returned or not.

☒

Default Method Pagination Limit
Some system APIs return history data in a paginated format. This setting controls the default page size when no specific page size is specified.

Benefit History Range (Days)
Some system APIs allow for benefit history to be searched by a given date range. This setting controls the maximum date range allowed for this search.

Redemption History Range (Days)
Some system APIs allow for redemption history to be searched by a given date range. This setting controls the maximum date range allowed for this search.

Card History Range (Days)
Some system APIs allow for card history to be searched by a given date range. This setting controls the maximum date range allowed for this search.

IVR Element Validation
IVR validations require that the cardholder enters a zip code and cardholder date of birth. State agencies may track household demographics, cardholder demographics, or both. This setting controls which data elements the system will ensure are provided to support these IVR validations:

- Household: The system will ensure that household mailing addresses and cardholder dates of birth are provided.
- Cardholder: The system will ensure that cardholder mailing addresses and dates of birth are provided.
- None: No special validations will be enabled.

☐ Household☐ Cardholder☒ None

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Mailed Card Element Validation
State agencies may opt to allow for replacement cards to be mailed to cardholders. This setting controls whether the system will ensure that cardholder mailing address is provided or not. This setting is only utilized in Online processing mode.

☐

Allow External ACH Debits
State agencies may opt to disallow debits from a paper to avoid potential decline issues, either due to an overdraft or due to an account not allowing debits at all. This setting controls whether those debits are allowed or not.

☒

IVR Element Validation
IVR validations require that the cardholder enters a zip code and cardholder date of birth. State agencies may track household demographics, cardholder demographics, or both. This setting controls which data elements the system will ensure are provided to support these IVR validations:

- Household: The system will ensure that household mailing addresses and cardholder dates of birth are provided.
- Cardholder: The system will ensure that cardholder mailing addresses and dates of birth are provided.
- None: No special validations will be enabled.

☐ Household☐ Cardholder☒ None

Mailed Card Element Validation
State agencies may opt to allow for replacement cards to be mailed to cardholders. This setting controls whether the system will ensure that cardholder mailing address is provided or not. This setting is only utilized in Online processing mode.

☐

Allow External ACH Debits
State agencies may opt to disallow debits from a paper to avoid potential decline issues, either due to an overdraft or due to an account not allowing debits at all. This setting controls whether those debits are allowed or not.

☒

Redemption File Type Codes
Redemption files produced by the system may contain a variety of transaction types. This setting controls the transaction types that will be included.

☒ Retail Only☐ Retail + J&T☐ Retail + AAC☐ All Types

Include Cost Containment Prices in Redemption Files
Redemption files produced by the system may contain the cost containment price in effect at the time of the transaction. This setting controls whether those prices are included in redemption files or not.

☐

ACH Includes Gateway Non-MDS
ACH files generated by the system may contain payments to gateway institutions that are not the master of settlement. This setting controls whether those payments are included in ACH files or not.

☒

Default Time Zone
Some system APIs require a default time zone to be used for date/time comparisons. This setting controls which default time zone is used.

Observes Daylight Saving Time
This setting controls whether the default time zone observes daylight saving time (DST) or not.

☒

Save

The Interface settings page displays the following configurable settings:

- PLU Check Digit Required controls whether the check digits should be required.
- Validate Unique Benefit ID controls whether the unique benefit IDs that system APIs allow to be re-used across requests are validated as unique or not.
- Return Zero Balance controls whether benefits with zero remaining balance will be returned or not.
- Default Method Pagination Limit controls the default page size when no specific page size is specified.
- Benefit History Range (Days) controls the maximum date range allowed for a benefit history search.
- Redemption History Range (Days) controls the maximum date range allowed for a redemption history search.
- Card History Range (Days) controls the maximum date range allowed for a card history search.
- IVR Element Validation controls which data elements the system will ensure are provided to support these IVR validations: household, cardholder, or none.
- Mailed Card Element Validation controls whether the system will ensure that cardholder mailing address are provided or not. This setting is only utilized in Online processing mode.
- Allow External ACH Debits State controls whether debits from a payee are allowed or not to avoid potential decline issues, either due to an overdraft or due to an account not allowing debits.
- Redemption File Type Codes controls the transaction types that will be included in the redemption file.
- Include Cost Containment Prices in Redemption Files controls whether the cost containment price in effect at the time of a transaction are included in redemption files or not.
- ACH Includes Gateways Non-MOS controls whether payments to gateway institutions that are not the master-of-settlement are included in ACH files or not.
- Default Time Zone controls which default time zone is used.
- Observes Daylight Saving Time controls whether the default time zone observes daylight saving time (DST) or not.

4.14.7 Files Settings

Settings / Files

Accounts **Cardholders** **Redemptions** **Cost Containment** **Data Retention** **Interfaces** **Files**

Archive Files
Incoming and outgoing files may be archived. This setting controls whether the file archival process should be enabled or not.

Archive Retention Duration
Incoming and outgoing files may be archived. This setting controls how many days that files within archive folders should be retained before allowing the system to delete them. When set to 0, retention is indefinite.

Compress Outbox Files
Some interfaces normally produce uncompressed outgoing files. This setting controls whether all outgoing files produced should be compressed or not.

Outbox Retention Duration
Outgoing files are made available within outbox folders for connecting entities to acquire. This setting controls how many days that outgoing files within outbox folders should be retained before allowing the system to delete them. When set to 0, retention is indefinite.

Duplicate Claim File Period
This setting controls the number of days of history to consider when determining if an incoming file is a duplicate or not. This setting is only utilized in Offline processing modes.

Hot Card List Retention Period
This setting controls the number of days that a card will remain within the hot card list from the time it was first deactivated. This setting is used to control the overall size of the HCL from growing unchecked. This setting is only utilized in Offline processing modes.

Benefit Activity File Versions
Benefit activity files are produced that contain records of each benefit issuance and void that was approved during the prior activity period. This setting is used to control which versions of those files are produced each day.

Benefit Expiration File Versions
Benefit expiration files are produced that contain records of each remaining benefit that was expiring during the prior activity period. This setting is used to control which versions of those files are produced each day.

Card Change Activity File Versions
Card change activity files are produced that contain records of each cardholder and card update that was made outside the primary system, typically the MIS, during the prior activity period. This setting is used to control which versions of those files are produced each day.

Vendor Operational Activity File Versions
Vendor operational activity files are produced that contain records of each vendor's operational status during the prior activity period. This setting is used to control which versions of those files are produced each day.

Redemption Activity File Versions
Redemption activity files are produced that contain records of each redemption that was approved during the prior activity period. This setting is used to control which versions of those files are produced each day.

ACH Payment Activity File Versions
ACH payment activity files are produced that contain records of ACH payments requested outside normal redemption payments during the prior activity period. This setting is used to control which versions of those files are produced each day.

Recoupment Activity File Versions
Recoupment activity files are produced that contain records of each vendor's daily recoupment activity during the prior activity period. This setting is used to control which versions of those files are produced each day.

Category/Subcategory File Versions
Category/subcategory files are produced that contain records of all categories and subcategories within the system. This setting is used to control which versions of those files are produced each day.

All EBA Updates File Versions
All EBA updates files are produced that contain records of each account update that was made during the prior activity period. This setting is used to control which versions of those files are produced each day.

All Card Updates File Versions
All card updates files are produced that contain records of each cardholder and card update that was made during the prior activity period. This setting is used to control which versions of those files are produced each day.

All Transactions File Versions
All transactions file are produced that contain records of each transaction that happened within the system during the prior activity period. This setting is used to control which versions of those files are produced each day.

All Batch File Versions
All batch files are produced that contain records of each batch file that was received and created during the prior activity period. This setting is used to control which versions of those files are produced each day.

The Files Settings page displays the following configurable settings:

- Archive Files controls whether the file archival process should be enabled or not.
- Archive Retention Duration controls how many days that files within archive folders should be retained before allowing the system to delete them.
- Compress Outbox Files controls whether all outgoing files produced should be compressed or not.
- Outbox Retention Duration controls how long outgoing files within outbox folders should be retained before allowing the system to delete them. When set to zero, retention is indefinite.

- Duplicate Claim File Period controls the number of days of history to consider when determining if an incoming file is a duplicate or not. This setting is only utilized in Offline processing modes.
- Hot Card List Retention Period controls the number of days that a card will remain within the hot card list from the time it was first deactivated and controls the overall size of the HCL from growing unchecked. This setting is only utilized in Offline processing modes.
- Benefit Activity File Versions controls which versions of the Benefit Activity files are produced each day.
- Benefit Expungement File Versions controls which versions of the Benefit Expungement files are produced each day.
- Card Change Activity File Versions controls which versions of the Card Change Activity files are produced each day.
- Vendor Operational Activity File Versions controls which versions of the Vendor Operational Activity files are produced each day.
- Redemption Activity File Versions controls which versions of the Redemption Activity files are produced each day.
- ACH Payment Activity File Versions controls which versions of the ACH Payment Activity files are produced each day.
- Recoupment Activity File Versions controls which versions of the Recoupment Activity files are produced each day.
- Category/Subcategory File Versions controls which versions of the Category/Subcategory files are produced each day.
- All EBA Updates File Versions controls which versions of the EBA Update files are produced each day.
- All Card Update File Versions controls which versions of the Card Update files are produced each day.
- All Transactions File Versions controls which versions of the Transactions files are produced each day.
- All Batch File Versions controls which versions of the Batch files are produced each day.

5 System Configuration

5.1 Types of Settings

5.1.1 Machine Settings

Machine settings are global to a particular machine and therefore impact every instance of WIC Direct running on that machine. When a machine hosts multiple installations, all installations running on that machine will be impacted by these settings. These settings are controlled via the appSettings.json file within the installation directory of WIC Direct.

Name	Description
CustomACHFolderName	The path of a custom ACH file drop location. This location will be in addition to the normal file location for the ACH file.
CustomAPLFolderName	The folder name to use for the APL folder. Defaults to APL but can be set to other values like APLTEST as needed.
CustomHCLFolderName	The folder name to use for the HCL folder. Defaults to HCL but can be set to other values like HCLTEST as needed.
DefaultBufferSize	The default size of the Transmission Control Protocol (TCP)/ Internet Protocol (IP) message buffer. This setting is used to request pre-allocated buffer space from the Buffer Manager shared by all TCP/IP channel instances. If the value is unspecified, a default value of 5096 bytes will be assumed.
EbtWebMisPassword	The system password sent to the WIC Direct services that are interfaced by the Web UI.
EbtWebMisSystemId	The system identifier sent to the WIC Direct services that are interfaced by the Web UI.
EbtWindowsServicePassword	The password for the Windows username under which all of the WIC Direct services will run.
EbtWindowsServiceUsername	The Windows username under which all of the WIC Direct services will run.
EmailAlertErrorListCap	The maximum number of errors to include in various email alerts.
EmailThrottlingMinutes	The duration (in minutes) used to determine when email throttling will go in effect and when it will subside. The system maintains a queue of timestamps for the last n emails sent, where n=emailThrottlingQuantity. Throttling is triggered when the time difference between the first and last timestamp entries in the queue are less than emailThrottlingMinutes. Throttling subsides when the time difference between the first and last entries exceed emailThrottlingMinutes.
EmailThrottlingQuantity	The number of emails sent during a given timeframe that will trigger the system to start spooling emails to a file instead of sending them out immediately. If this value is set to 100 and a burst of 100 emails is generated

Name	Description
	within a timeframe less than emailThrottlingMinutes, the 100th email will be spooled. Spooled will never be sent.
FileOpenTimeout	The maximum time allowed for opening a file before timing out and generating an error.
FileProcessingServiceDisabled	A flag indicating whether the file processing service is disabled on the host machine.
FileProcessingTimerInterval	The frequency (in milliseconds) with which the file processor checks the watched folder(s) for new work.
FtpWaitFlag	The file name to look for to trigger the file processor to temporarily stop processing new file uploads until after the file in question is removed.
HostAccountName	The folder name to use for the host folder. Defaults to CDP but can be set to other values as needed.
HostActivityCutoffTime	The time of day in Greenwich Mean Time (GMT) that serves as the cutoff for daily transaction reporting.
HostProcessingServiceDisabled	A flag indicating whether the host processing service is disabled on the host machine.
HostSettlementCutoffTime	The time of day (in the time zone specified in the setting HostSettlementCutoffTimeZone) before which a transaction must occur in order to be included in the settlement for that day.
HostSettlementCutoffTimeZone	The time zone that the HostSettlementCutoffTime should be pinned to. For example, a value of "UTC" means that the cutoff time may effectively "float" with daylight savings time. A value of "Central Standard Time" means that the cutoff time means the set time in that time zone whether daylight savings time is in effect or not.
HsmGroup	Comma-separated list of hardware security module (HSM) servers that are available in group for hardware security.
HsmInterfaceServiceDisabled	A flag indicating whether the HSM interface service is disabled on the machine.
HsmMaxPoolSize	Number of connections allowed per HSM server available in the server group.
IisControlTimeout	The timeout period (in milliseconds) that the installer will wait for IIS to restart after setting up the virtual directory.
InboxArchiveFolderName	The name of the folder in which to write a copy of all of the files written to the FTP inbox.
InboxFolderName	The name of the folder in which to write incoming files to be processed.
InitialConnectionTimeout	The timeout period (in milliseconds) for client connections to complete.
InstallAssistantServiceDisabled	A flag indicating whether the install assistant service is disabled on the host machine.
InterfaceServiceDisabled	A flag indicating whether the interface service is disabled on the host machine.

Name	Description
InterMessageTimeout	Maximum amount of time (in milliseconds) that the system will wait in between messages before timing out the connection.
IntraMessageTimeout	Maximum amount of time (in milliseconds) that the system will wait for the next message segment before timing out the connection.
MaximumMessageSize	The maximum message size (in bytes) that the system can process.
MaximumSettableExpungementPeriod	The maximum settable period (in days) for the expungement process to look to back in time for benefits to expunge.
MaximumSettableReversalVoidPeriod	The maximum settable period (in days) for purchases and store and forward age that are allowed to still be reversed or voided.
OAuthApplicationPool	The IIS application pool under which the OAuth endpoint is installed and will run.
OAuthServerBaseUrl	The root URL where the secure OAuth endpoint is hosted.
OAuthServerUsername	The username of the identity in which the OAuth endpoint runs under.
OAuthVirtualDirectory	The name of the virtual directory in which the website files are located on the Windows file system for the OAuth endpoint.
OAuthWebsiteName	The name of the used by the installer and referenced in IIS Administration tools for the OAuth endpoint.
OutboxArchiveFolderName	The name of the folder where a copy of all output files will be saved.
OutboxFolderName	The name of the folder where all output files will be saved.
PartialTimeoutThreshold	Used to alert administrators to a higher-than-expected number of intraMessageTimeouts. A message will be logged whenever this threshold is reached. Lowering this value will increase the number of times a message is logged.
PasswordExpirationDays	Number of days after which a user sets a password before the login process will force the user to change their password.
PasswordHashIterations	Number of password hash iterations used to hash passwords in the database.
PreoutboxFolderName	The name of the folder where all output files are written before they are saved to their final folder location within the outbox folder.
ServerDatabaseUpgrade	Designates the name of the server that will be responsible for upgrading the environment's database during an installation or upgrade.
ServerGroup	A group of servers that work together as part of the same WIC Direct system, typically where one is a host processor and another is a file processor/web server.
ServerType	The type of server the host machine is supporting. The value specified must be one of the following: DEV- A development server

Name	Description
	TEST- A testing/integration server CERT- A certification/UAT server QA- A quality assurance server PROD- A production server
ServiceControlTimeout	The timeout period (in milliseconds) that the installer will wait for services to start during installation.
SmtpFromDoNotReply	The email address used to send alerts where we do not expect direct replies to be received.
SmtpPort	The TCP/IP port used for Simple Mail Transfer Protocol. This is the outbound email port.
SmtpServer	The host name or IP address of the Simple Mail Transfer Protocol server for sending email messages.
SmtpToAchInfo	Comma-separated list of email addresses where ACH file delivery emails will be received.
SmtpToAcknowledgmentAlert	Comma-separated list of email addresses where acknowledgement alert emails will be received.
SmtpToAlert	Default email address where application alerts will be received.
SmtpToConfirmationAlert	Comma-separated list of email addresses where confirmation alert emails will be received.
SmtpToFileDelivery	Comma-separated list of email addresses where file delivery emails will be received.
SmtpToFinancialAlert	Comma-separated list of email addresses where financial alert emails will be received.
SmtpToMissingVendor	Comma-separated list of email addresses where missing vendor emails (when vendors that exist in the system are not received in a vendor update file) will be received.
SmtpToNteException	Comma-separated list of email addresses where NTE exception emails will be received.
SmtpToOperations	Comma-separated list of email addresses where service status emails will be received.
SmtpToOutOfBalance	Comma-separated list of email addresses where out-of-balance emails will be received.
SmtpToSecurityAlert	Comma-separated list of email addresses where security alert emails will be received.
SmtpToVendorInfo	Comma-separated list of email addresses where vendor information emails will be received.
SslCertificateName	Name of the SSL certificate to use to secure SSL endpoints within the application.
SslInterMessageTimeout	Maximum amount of time (in milliseconds) that the system will wait in between SSL messages before timing out the connection.
SslIntraMessageTimeout	Maximum amount of time (in milliseconds) that the system will wait for the next SSL message segment before timing out the connection.
ThreadPoolMinimumThreadsPerCore	Minimum number of idle threads per core in the thread pool. The thread pool provides new worker threads or I/O completion threads on demand.

Name	Description
TraceDaysToKeep	The period (in days) for service trace logs to be retained on application servers before they are purged.
UseFullyQualifiedNameXml	Flag indicating if the fully qualified path should be used in namespaces for Extensible Markup Language (XML) files created and consumed.
UseSslConnectionForXsd	Flag indicating if the internal download of XSDs during file processing should use a Secure Sockets Layer (SSL) connection or not.
WumeiApiApplicationPool	The IIS application pool under which the WUMEI API is installed and will run.
WumeiApiVirtualDirectory	The name of the virtual directory in which the website files are located on the Windows file system for the WUMEI API.
WumeiApiWebsiteName	The name of the used by the installer and referenced in IIS Administration tools for the WUMEI API.

5.1.2 Data Access Timeouts

Data access timeout settings are similar to machine settings in that they impact all installations of WIC Direct on a machine. These settings are also controlled via the appSettings.json file within the installation directory of WIC Direct.

Name	Description
CommandName	The name of the data access layer command to override the timeout value of.
Timeout	The timeout value in seconds.

5.1.3 Cache Expiration Times

Cache expiration time settings are similar to machine settings in that they impact all installations of WIC Direct on a machine. These settings are also controlled via the appSettings.json file within the installation directory of WIC Direct.

Name	Description
CommandName	The name of the caching layer command to override the timeout value of.
ExpirationTime	The timeout value in seconds.

5.1.4 Installations

Installation settings are similar to machine settings in that they impact all installations of WIC Direct on a machine. These settings are also controlled via the appSettings.json file within the installation directory of WIC Direct.

Name	Description
BankingApiClientKey	The client key associated with the bank API.
BankingApiClientSecret	The client secret associated with the bank API.
BankingApiHttpAddress	The root URL of the configured bank API.

BankApiTestDataFolder	The folder path for test data files to use in place of a live bank account.
BaseApplicationPool	The IIS application pool under which the Web UI is installed and will run.
BaseHttpAddress	The root URL where the Web UI is hosted.
BaseHttpsAddress	The root URL where the secure Web UI is hosted.
BaseVirtualDirectory	The name of the virtual directory in which the website files are located on the Windows file system.
BaseWebsiteName	The name of the website used by the installer and referenced in IIS Administration tools.
CacheEndpoint	The address for the caching tier endpoint.
ConnectionString	The encrypted connection string pointing to the main database on the primary server.
CrossroadsInterfaceAddress	URL for the Crossroads service interface.
CrossroadsInterfaceSecureAddress	URL for the SSL-secure Crossroads service interface.
FisIvrInterfaceAddress	URL for the FIS Interactive Voice Response (IVR) interface.
FisIvrInterfaceSecureAddress	URL for the SSL-secure FIS IVR interface.
FtpAccountQualifier	An optional prefix that is added to FTP folder and account names.
FtpDirectPath	Exact directory of where the ftp share is located. C:\FTPShare\LocalUser
FtpOrganizationalUnit	Organizational unit in the active directory domain. "ou=D5,ou=TESTING,ou=EBTFTP,ou=Customers,dc=cdps,dc=cdp"
FtpServerDomainName	The domain name for the FTP-hosted server.
FtpServerMachineName	The machine name for the FTP-hosted server.
FtpUserPassword	Password of the ftp user being created.
FtpUserType	Type of user that will be added to either the local server or the active directory. Possible values AD= Active Directory, Local=Local user on the server.
HostProcessingAddress	The base address of the WIC Direct host processor.
HostProcessingSecureAddress	The base address of the SSL-secure WIC Direct host processor.
HsmInterfaceAddress	URL for the HSM service interface.
HsmInterfaceSecureAddress	URL for the SSL-secure HSM service interface.
InstallationCode	The unique installation code assigned to this particular installation of WIC Direct.
InterfaceAddress	The base address of the WIC Direct interface service.
InterfaceSecureAddress	The base address of the SSL-secure WIC Direct interface service.
LogConnectionString	The encrypted connection string pointing to the log/audit database on the same server as the connection string.
MasterConnectionString	The encrypted connection string pointing to the master database on the same server as the connection string. This is used by the installer for calling specific procedures that are accessible in the master database.
Name	The name of the installation. This is simply an arbitrary string value. It is used as a key for referencing installation-specific settings.

OdsConnectionString	The encrypted connection string pointing to the main database on the replica server.
ParticipantPortalInterfaceAddress	URL for the participant portal.
ParticipantPortalInterfaceSecureAddress	URL for the SSL-secure participant portal.
PinValidationEnabled	A flag indicating whether to validate PIN numbers for cards that are regarded as Test Cards by the system. Note: This setting should be used only by test systems.
ProcessingMode	A value indicating whether WIC Direct is running in online, offline, or offline (queue) mode.
RootFtpPath	The root file system path of the default FTP server for this installation. This value supports UNC paths.
SimulatedBalanceResponseLag	The time (in milliseconds) to wait in order to simulate a system lag for a balance inquiry response. Note: This setting should be used only by test systems.
SimulatedNetworkMgmtResponseLag	The time (in milliseconds) to wait in order to simulate a system lag for a network management message response. Note: This setting should be used only by test systems.
SimulatedPurchaseResponseLag	The time (in milliseconds) to wait in order to simulate a system lag for a purchase response. Note: This setting should be used only by test systems.
SimulatedReversalResponseLag	The time (in milliseconds) to wait in order to simulate a system lag for a purchase reversal response. Note: This setting should be used only by test systems.
UniversalInterface2012Address	URL for the 2012 WIC Universal MIS EBT interface.
UniversalInterface2012SecureAddress	URL for the SSL-secure 2012 WIC Universal MIS EBT interface.
UniversalInterface2014Address	URL for the 2014 WIC Universal MIS EBT interface.
UniversalInterface2014SecureAddress	URL for the SSL-secure 2014 WIC Universal MIS EBT interface.
UniversalInterfaceAddress	URL for the WIC Universal MIS EBT interface.
UniversalInterfaceSecureAddress	URL for the SSL-secure WIC Universal MIS EBT interface.