**RFP 26-84315**

**Attachment L1 – Bidder’s Library**

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# Section 1 – Standard Reports List

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| **Current Report Title** | **Report Section/Module** | **Description** |
| Caseload Utilization Report | Caseload | Provides caseload data. Search parameters include state, local agency, and fiscal year. Report columns include month, caseload, ISSD/30DY Enrolled, closeout enrolled, ISSD/30DY Participation, percentage of caseload, non-participation, close participation, and year-to-date (YTD) average. |
| Client Call Back List | Breastfeeding | A report generated from the ‘call back date’ entered on the ‘contact history’ row of the BF tab. The columns should include staff (provider), role, method, call back date, phone number, client ID, client name, category, EDD, and baby’s date of birth (DOB). The report should be accessible at the local agency and state level. The statewide report should be grouped by the local agency and clinic. |
| Clients by Cert End Date Report | Participation | This report pulls a list of clients within a specified timeframe that have cert periods that end within that timeframe. Search parameters include clinic, from date, through date, no future appointments, and all clients. Report columns include authorized representative (AR) 1 or client full name, category code, DOB, cert start date, cert end date, benefits valid through (BVT) date, termination date, termination reason, and next appointment. |
| Clients Eligible for Benefits | Participation | This report pulls a list of clients that are eligible for more benefits. Search parameters include state, local agency, clinic, date from, date through, no future appointments, and all clients. Report columns include AR1 or client full name, category code, cert start date, cert end date, BVT date, termination date, client ID, termination reason, and next appointment. |
| Medicaid Outreach Report | Medicaid | Provides a list of names of people enrolled in Medicaid that are not enrolled in WIC,but may be eligible. Search parameters include local agency and county. Report columns include Medicaid ID, WIC status, DOB, first name, last name, address, city, zip code, phone number, and action taken. |
| Monthly Termination Report - Details | Priority Reports | Provides a detailed list of clients terminated within a specified month and year. Search parameters include state/local agency, local agency/clinic, month, and year. Report columns include client name, client ID, client category, termination date, and termination reason. |
| Ongoing Priority Status by Category | Caseload | Provides priority status by client category. Search parameters include state, local agency, year, and month. Report columns include current status, one-year old children (C1), two-year old children (C2), three-year old children (C3), four-year old children (C4), IBP, IFF, IBE, NPP, BE, BP, PG and total clients. Report rows include priority 1, priority 2, priority 3, priority 4, priority 5, priority 6, priority 7, transfer priority, total clients, and total migrants. |
| Priority Enrollment by Category | Caseload | Provides totals of priority enrollment by category. Search parameters include state, local agency, year, and month. Report columns include client category (C1, C2, C3, C4, IBP, IFF, IBE, NPP, BE, BP, PG) and total clients. Report rows include current status (client category) and total enrollees. |
| Racial Ethnic Enrollment by Category | Caseload | Provides participation by client category and race. Search parameters include state, local agency, year, and month. Report columns include client category, each racial/ethnic category, total clients, and Hispanic or Latino clients. Report rows include IFF, IBE, infant mostly breastfeeding (IBPm), infant breastfeeding some (IBPs), total infants, C1, C2, C3, C4, total children, BE, BP, NPP, and PG. |
| Racial Ethnic Enrollment by Major Category | Caseload | Provides totals of enrollees by racial/ethnic and client category. Search parameters include state, local agency, year, and month. Report columns include client category, racial/ethnic category (American Indian or Alaskan Native, Asian, Black or African American, Native Hawaii or other Pacific Islander, White, and Multi-Racial), total clients, and Hispanic or Latino clients. Report rows include PG, breastfeeding, non-breastfeeding, total women, infants, children, infant/child total, and total clients overall. |
| WIC Dual Enrollment Report | Priority Reports | Provides a list of client names that are duplicated in the INWIC system. Search parameters include state, local agency or clinic, month, year, and resolution status (All, All – Resolved, All – Unresolved, Investigate, Resolve – Different Client, Resolve – Duplicate Record – Block, Resolve – Duplicate Record – Keep, Resolve – Other) . Resolution status is tied into another feature of INWIC not yet used – Resolve Dual Enrollment under the Miscellaneous Tab in the INWIC Clinic Module.  Report columns include client ID, client Name, DOB, certification (cert) start date, cert end date, BVT date, authorized representative (rep) name, clinic code (Local Agency and Clinic number), date ID’d , date resolved, and notes. |
| Local Agency Directory | Admin | This report provides a list of local agencies and their clinic sites with their clinic name, address, and phone number. Search parameters include state, local agency, and clinic. Report columns include local agency number, clinic name, clinic address, level type (state, local or clinic) and phone number. |
| ME Finding Report | Admin | This report populates the Review ID number and Local Agencies for a given date range and shows the total findings and individual findings for the State and Local levels. Only pulls data at the state level. |
| Mobile App Client Issue Report | Admin | This report shows individuals who submitted a report to the app for issues related to the app. The report shows the date the report was made, EBT card number, login ID, note from client about the problem and if a screenshot was attached. Populates at the state level only and does not designate Local or Clinic ID. |
| Benefit Over Issuance | EBT Reports | This report provides a list of clients that were over issued benefits. The search parameters are issue month and issue year. Report columns include user staff name, HH ID, Client ID, Benefit Start Date, and Number of Months Benefits Generated. |
| Benefit Re-Issuance By HH | EBT Reports | This report provides a list of clients by local agency that were reissued benefits, the reason for reissuance and how many months were generated. The search parameters are date from and date thru. Report column headers include HH ID, Client ID, Staff Initials, date of reissuance, reason, benefit start date, and number of months generated. |
| Benefit Re-Issuance by Staff | EBT Reports | This report provides benefit reissuance information sorted by staff and by local agency. The search parameters are date from and date thru. Report column headers include staff initials, client ID, HH ID, date of reissuance, reason, reissuance date and number of months benefits generated. |
| Caseload Billing Verification Summary | EBT Reports | This report provides the number of households by local agency and clinic. Current search parameters are month and year. Report columns include clinic and number of families. |
| Cat/Sub Cat State Average Price | EBT Reports | The report is intended to provide average food prices by food category (cat) and subcategory (subcat). The search parameters are date from and date thru. Report column headers include cat code, subcat code, quantity redeemed, total settled price, prior month state average price, new state average price, and percentage change. |
| Daily Dollar Volume of Sales | EBT Reports | This report provides the number of transactions completed and total amount of money spent on those WIC transactions by local agency and vendor peer group. The search parameter is by date. Vendor information is then grouped beneath by peer group. Report column headers include vendor name, vendor number, local agency code, transactions, and total dollars. |
| Daily LA Redemption Activity | EBT Reports | This report pulls transaction information based on settlement date. It provides the total dollars spent by clients and by local agency and clinic. Search parameter is settled date. This is a state/local agency report. Report column headers include transaction date, clinic code, transactions, and total dollars. |
| Local Agency Special Formula | EBT Reports | This report pulls by month and fiscal year a list of each of the special formulas issued and the quantity and the total amount spent on each special formula. Search parameters include local agency, month, and fiscal year. Report column headers include local agency, special formula, size/form, subcat, total quantity, and total dollars. |
| Maximum Price Adjustment | EBT Reports | No search parameters. The report is intended to provide information needed to make maximum price calculations, but this information is currently generated and analyzed by Indiana (IN) WIC separately. |
| Minimal Sales in Past Six Months | EBT Reports | Search parameter is by date. The report is intended to provide a list of vendors who have conducted no or few transactions in the past six redemption months. |
| Monthly LA Redemption Activity | EBT Reports | This report pulls the total number of transactions for a given month and fiscal year and the total dollars spent on those transactions. Search parameters are month and year. This is a state/local agency report. Report column headers include local agency, transactions, and total dollars. A state total is provided at the bottom of the report. |
| Monthly Redemption Settlement by Day | EBT Reports | This report provides a breakdown of redemptions by day and the total dollar amount redeemed by each of those days within the month. A total amount is provided at the bottom. Current search parameters are settlement month and settlement year. Report column headers include settled date and redeemed amount. |
| Obligation/De-Obligation Report | EBT Reports | This report provides the total amount of benefits issued/reissued, the total amount of benefits redeemed, the total amount of benefits voided, and the total amount of benefits expired. Information is provided for each local agency within the state. Search parameters include issue month and issue year. Report column headers include clinic, redemption month breakdown, obligation and benefit reissuances, benefits redeemed, benefits voided, and benefits expired. |
| Quarterly Dollar Volume of Sales | EBT Reports | This report provides a dollar amount for WIC transactions that occurred within the quarter. Search parameters include year and quarter. This is a statewide report. The information is grouped by peer group. Report column headers include vendor name, vendor number, local agency code, number of transactions, total dollars, and average per transaction. |
| Void Current Month Benefit Summary | EBT Reports | This report provides a count of the total number of voids that occurred for the current month benefit by Universal Product Code (UPC) category. This is a statewide report grouped by local agency and clinic. Search parameters include date from and date thru. Report column headers include clinic ID, total voids, and UPC Category. |
| Void Future Month Benefit Summary | EBT Reports | This report provides a count of the total number of voids that occurred for future months by UPC category. A state total is provided at the bottom. This is a statewide report grouped by local agency and clinic. Search parameters include date from and date thru. Report column headers include Clinic ID, total voids, and UPC category. |
| Expenditures Worksheet | Expenditures Worksheet | This report shows monthly expenditures for the selected fiscal year. Displays issuance and totals for the State for each month of the fiscal year. |
| Outreach Planning and Tracking Log | Outreach Planning and Tracking Log | This report shows the outreach planning for the fiscal year. |
| Rebate Billing | Rebate | This report provides a list of the contract formulas and the total count of redemptions and total dollar amount spent for each contract formula. The bottom row provides total redeemed and total dollars spent. Report columns include containers redeemed, formula type/form, formula description (name), and unadjusted total dollars. |
| Risk Factor Rules | Risk Factor Rules | This report lists the risk factors and associated rules. Report column headers include rule number, rule name, metric area, metric description, active flag, and low or high status. |
| Local Agency / State User Roles | Role Reports | This report lists the INWIC user and the roles assigned to them for each clinic that has been assigned to them. Search parameters include state and local agency. |
| Role Permissions | Role Reports | This report lists the permissions assigned to each role. Search parameter is by module. Report column headers are screen/report, no access, read only, and update. |
| Single User Certification Report | Role Reports | This report shows certifications completed from beginning to end by one person. Search parameters include state, local agency, clinic, date from, and date through. Report headers include client ID, client last name, client first name, certification date, benefits issued by, and transfer status. |
| User Role History by Staff Member Report | Role Reports | This report lists the history of a staff member’s assigned roles. Selection parameters include state, local agency, all staff, staff member name. Report column headers include local agency, staff member name, module, role, assigned date, assigned by, role end date, role ended by date. |
| User Role Report | Role Reports | This report displays the INWIC users and the role(s) assigned to them. Search parameters are all users, state users, local agency users, clinic users, and module. Report columns include user ID, module, user name, and role description. |
| User Status Report | Role Reports | This report shows access activity for INWIC users. Search parameters include state, local agency, clinic, and user status. Report column headers include user last name, user first name, user ID, access provided on, and last access date. |
| Clinic Closed Hours and Holiday User Monitoring Report | Staff Compliance | This report pulls a list of users logged into the INWIC system on days the local agency/clinic is closed or on designated holidays. Search parameters include local agency, clinic, date from, and date to. Report column headers include user ID, user name, date, log in time, and log out time |
| INWIC Access Monitoring Report | Staff Compliance | This report pulls a list of users that have accessed INWIC. Search parameters include local agency, clinic, staff, date from, date to, time from, and time to. Report column headers include user ID, user name, date, log in time, and log out time. |
| INWIC Transaction Monitoring | Staff Compliance | This report pulls a list of INWIC users that completed certain appointment types. Search parameters include local agency, clinic, staff, date from, date to, time from, and time to. Report column headers include clinic, user ID, user name, date, log in time, log out time, HH ID, Client ID, cert, trasf, FP, and befts. Indiana WIC is uncertain on the intended data for the last three columns. |
| IRUA Agreement Report | Staff Compliance | This report pulls a list of INWIC users and the most recent date they agreed to the Information Technology Resource User Agreement (IRUA) page within INWIC. Search parameters include state, local agency, and year. Report column headers include local agency, last name, first name, and agreement date. |
| High Risk Vendor Report | High Risk Vendor Report | A listing of authorized vendors grouped by local agency that lists vendor and violation information. Columns include: vendor number, vendor name, vendor address, violation date, violation description, and violation points with vendor and local agency violation point totals. |
| Above-50% Report | Above-50% Report | A listing of vendors grouped by local agency who exceed 50% of their food sales through WIC transactions, calculated by using fiscal year WIC EBT redemption data in comparison to stated total annual food sales as entered into the MIS. Columns should include assigned staff person, vendor number, vendor name, store address, city, fiscal year WIC EBT redemption amount to date, total annual food sales amount, and authorization status. |
| Vendor Application Log | Vendor Application Log | A listing of in-progress vendor applications grouped by local agency that includes assigned staff person, vendor number, vendor name, store address, city, date application is created, and current status. |
| Vendor Complaint Log | Vendor Complaint Log | A listing of logged vendor complaints grouped by local agency that includes assigned staff person, vendor number, vendor name, store address, city, complaint date, complaint type, and associated notes for a stated date range. |
| Vendor Compliance Activity | Vendor Compliance Activity | A listing of vendors investigated through compliance buys or inventory audits grouped by local agency that includes assigned staff person, vendor number, vendor name, store address, city, investigation case dates, investigation type, visit/review dates, vendor violations, TIP indicator(s), violation points total, and associated notes for a stated date range. |
| Vendor EBT Information Report | Vendor EBT Information Report | Report that shows the number of transactions, the date and the total redemption amount for the store. This report shows the whole month to date. |
| Vendor Expiration Report | Vendor Expiration Report | A statewide listing of vendors where the current authorization is either already expired or set to expire within the next 90 days grouped by local agency that includes assigned staff person, vendor number, vendor name, store address, city, authorization start date, authorization end date, and contract type. |
| Vendor History | Vendor History | A report showing the Vendor Number, Suffix Chain, Vendor Name, Posted Date, Action Type, Contract Start Date, Contract End Date, Termination Date and Denial Date. |
| Vendor Monitoring Activity | Vendor Monitoring Activity | A listing of vendors with vendor monitoring visits grouped by local agency that includes assigned staff person, vendor number, vendor name, store address, city, monitoring case dates, monitoring reason, visit dates, vendor violations, violation points total, and associated notes for a stated date range. |
| Vendor Training – Not Attended | Vendor Training – Not Attended | A listing of authorized vendors who have not attended mandatory vendor training grouped by local agency for a stated date range. Columns should include assigned staff person, vendor number, vendor name, store address, and city. |
| Vendor Training Sites | Vendor Training Sites | A report that populates with the Date, Time, Training Site and Address (training type) of Vendor Training across the State. Report will only show results at the State level, no individual Local or Clinic levels. |

# Section 2 – INWIC Systems Technical Documents

Diagram

AI-generated content may be incorrect.

Diagram

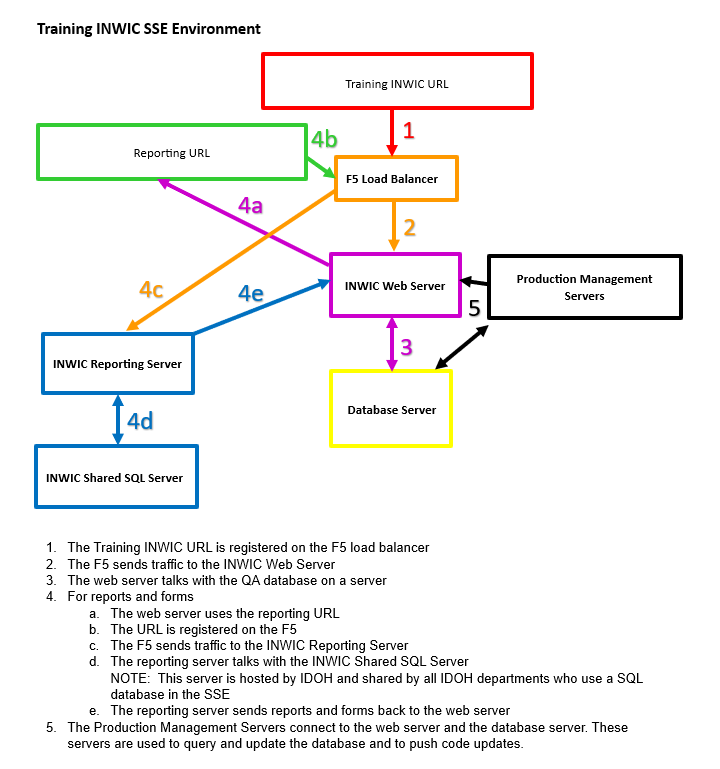
AI-generated content may be incorrect.

Diagram

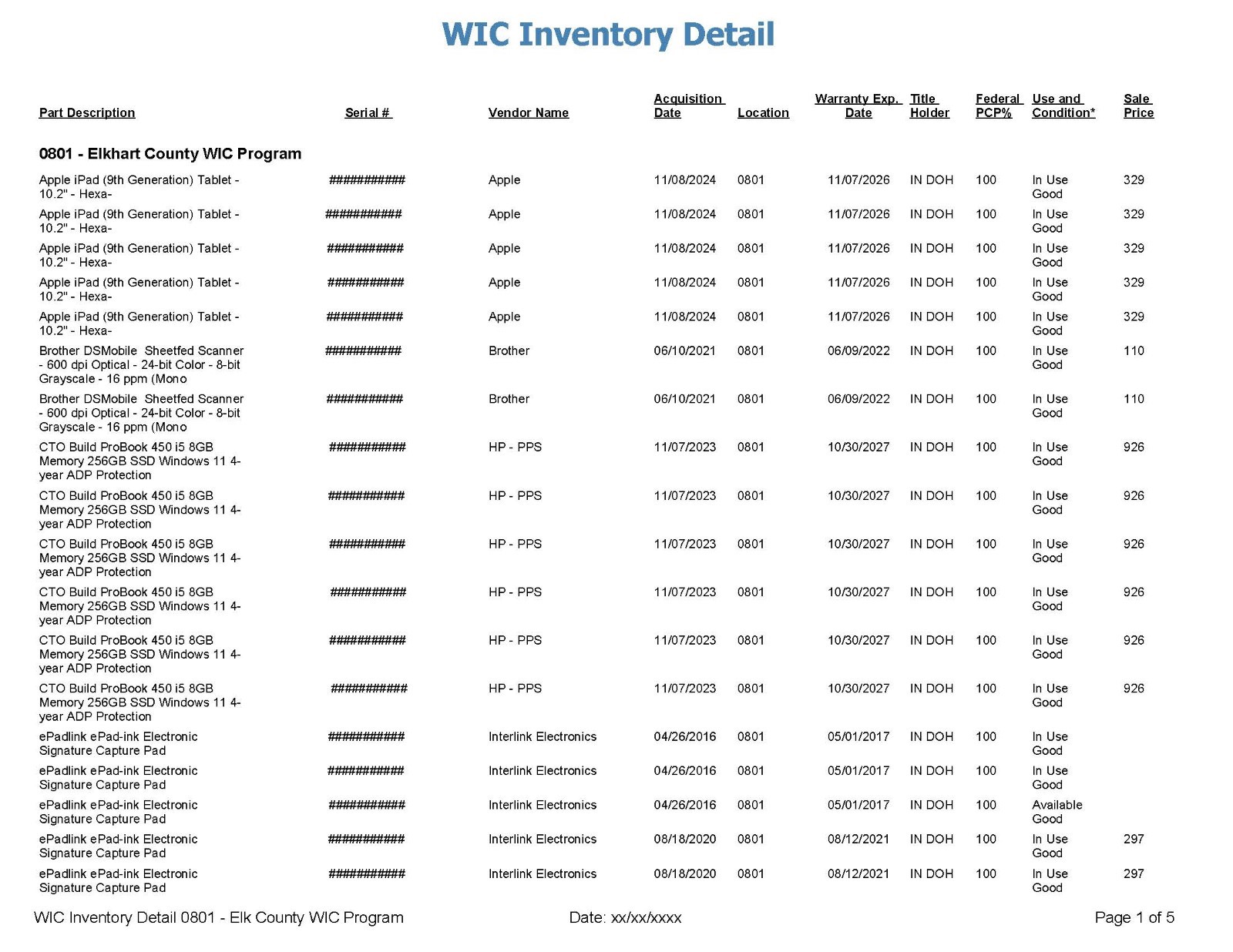
AI-generated content may be incorrect.

Diagram

AI-generated content may be incorrect.



Section 3 – Sample Inventory Screenshots



Table

AI-generated content may be incorrect.