Chapter 8: Operations Management
Section 1: Operations Management
Lesson: Special User – Agency/Clinic Information

Objectives:

Upon completion of this lesson the user will be able to:

- create and maintain local agency data, i.e., mailing or physical addresses and phone numbers;
- create and update various types of clinics within the local agency;
- access and view data for their local agency;
- set the "Family Pre-Coding" field correctly for their local agency;
- establish base hours per week for their agency's FTE;
- create and update clinic hours and clinic closures via the "Clinic Hours" screen;
- explain how the data entered in the "Clinic Information" function impact the Appointment Scheduler;
- access and view all three of the "Staff" buttons; and
- access and review data concerning local agency reviews.

Overview:

The "Agency/Clinic Information" function of TWIST will allow you to establish and update information on your local agency and all your clinics. This information consists of a variety of data including:

a. clinic hours;
b. dates clinic is closed;
c. type of clinic;
d. mailing and physical address and information;
e. phone numbers;
f. staff information;
g. Farmers' Market participation;
h. FI stock information;
i. WIC review information; and
j. specific clinic data.

You will establish a link from this section to the Appointment Scheduler that will allow you to establish how you want to handle family appointments, and dates and times appointments can be scheduled.

Instruction:

Reviewing the "Agency/Clinic Information" Window

1. **Double click on the "Operations Management" icon**.

2. **Click on "Operations" on the menu bar.**

3. **Select "Agency/Clinic Information."**

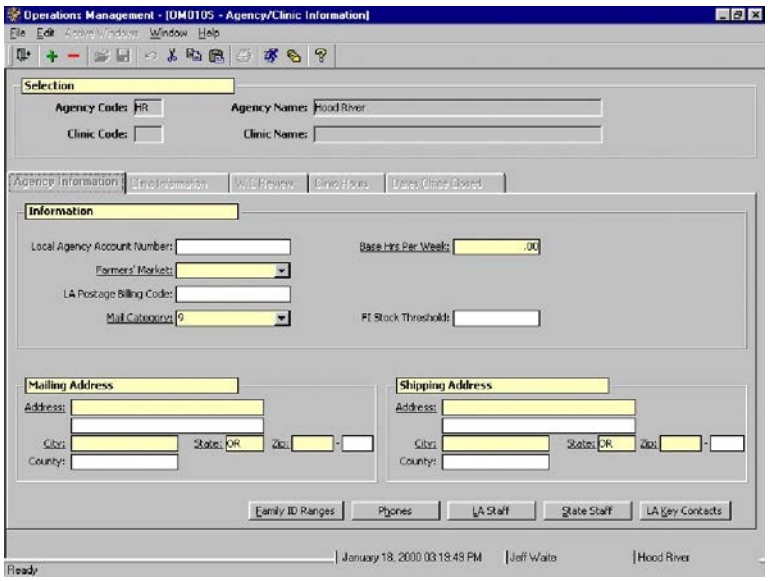


Figure 1: "Agency/Clinic Information" Window

The "Selection" section will always be displayed at the top of the screen. Different screens for the "Agency/Clinic Information" function will be displayed in this window. Each screen can be accessed by clicking on the tabs.

- The "Selection" section will display your local agency.
- The **"Agency Code"** and **"Agency Name"** fields are automatically generated by the system based on your User ID.
- The **"Clinic Code"** and **"Clinic Name"** are blank, but they will be populated once you enter new clinic information on the "Clinic Information" screen or conduct a search for an existing clinic.

Completing the "Agency Information" Screen

The starting point for this section is:

Operations Management ⇨ Operations ⇨ Agency/Clinic Information

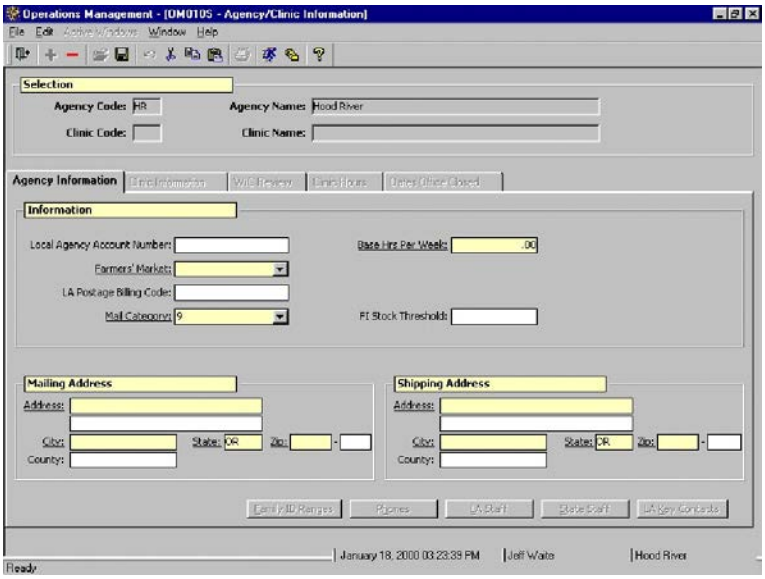


Figure 2: "Agency Information" Screen

"Agency Information" Fields

1. **Complete or update the fields in the "Agency Information" screen.**

   1.1 **"Formula Account Number"** is a display of the number assigned to your local agency by the state office and used to track formula sample shipments.

   1.2 **"Base Hrs Per Week"** indicates the number of hours per week that define the Full Time Equivalent (FTE) for WIC staff at your agency.

   1.3 The **"Farmers' Market"** field indicates if your agency participates in the Farmers' Market program.

   1.4 **"LA Postage Billing Code"** is the code used to indicate which budget area will be charged the postage cost for your agency. The system will print this code on the return address field to facilitate the billing procedures.

   1.5 The **"Mail Category"** field is used to indicate the method you receive mail from the state office, e.g. via state shuttle or regular mail.

1.6 **"FI Stock Threshold"** field is used to indicate the minimum amount of FI stock you will keep on hand at your agency. When FI stock drops below this amount you will be reminded to order a new supply.

2. **Complete or update the "Mailing Address" section.**

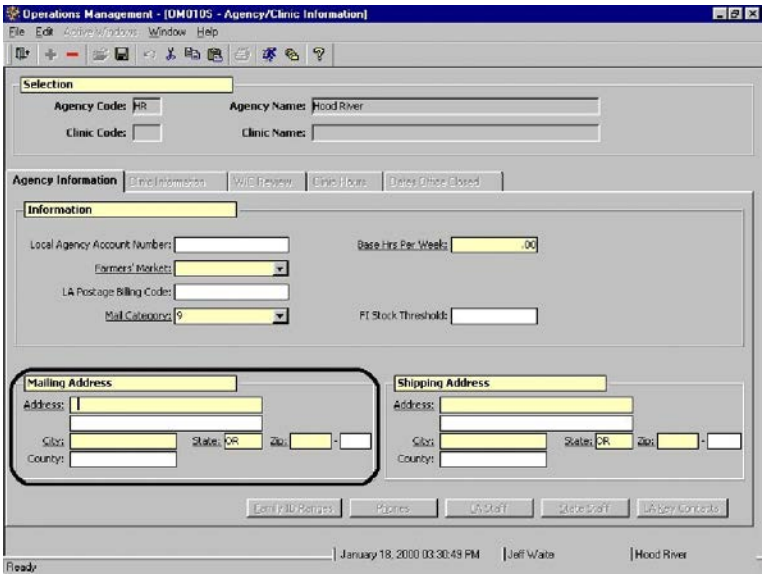


Figure 3: "Mailing Address" Section

3. **Complete or update the "Physical Address" section.**

If the physical address is the same as your agency's mailing address you may just save the "Mailing Address" and it will be copied into the "Physical Address" fields. The physical address will be used to ship items not appropriate to be mailed.

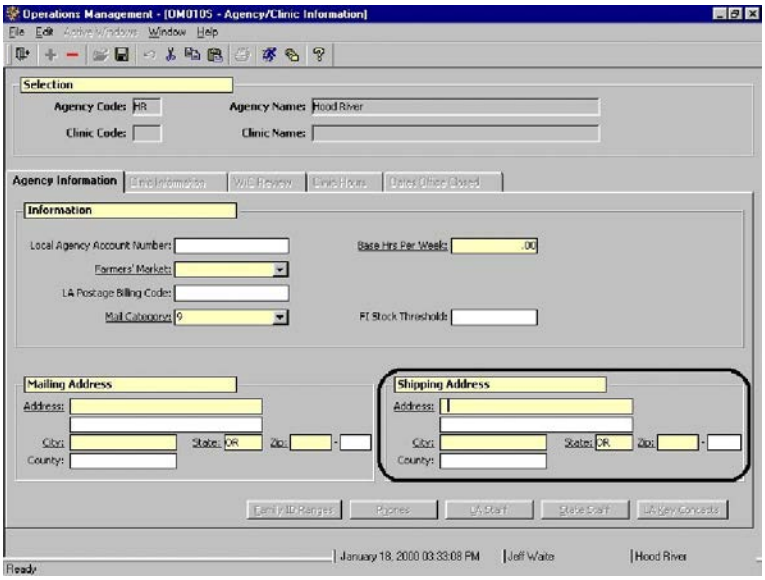


Figure 4: "Physical Address" Section

4. **Save.**

   Once you have saved your data you should see that the buttons at the bottom of the screen are now activated and the other four tabs in the window are also activated.

"Agency Information" Buttons

5. **Click on the "Family ID Ranges" button.**

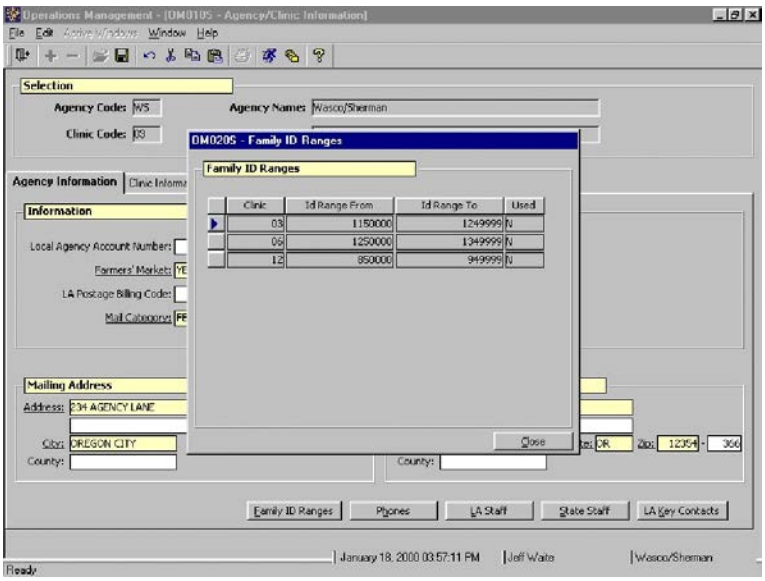


Figure 5: "Family ID Ranges" Pop-Up

This pop-up is a system generated range of ID numbers that may be used for family members. This pop-up is display only.

5.1 The **"Clinic"** field displays a list of the clinics in your agency.

5.2 The **"ID Range From"** field displays the beginning number of the ranges of WIC IDs available to family members in that clinic.

5.3 The **"ID Range To"** is the ending number of the range.

5.4 The **"Used"** field displays a "Yes or No" to indicate whether or not the range assigned to that clinic has been used and a new range assigned.

6. **Click "Close."**

7. **Click on the "Phones" button.**

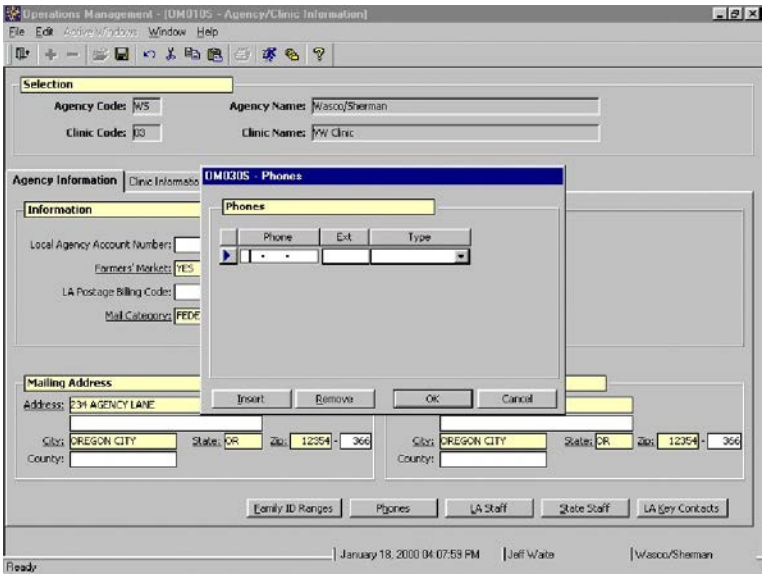


Figure 6: "Phones" Pop-Up

- This pop-up allows you to enter phone numbers for your agency and indicate the type of phone from the drop down list.
- Phone numbers associated with the agency will appear on reports and listings of agencies statewide.
- The "Insert" and "Remove" buttons allow you add additional numbers or delete old numbers.
- The "OK" button will save the information and close the pop-up.

- The "Cancel" button will close the pop-up without saving the information.

8. **Click "OK" to close the "Phones" pop-up.**

9. **Click on "LA Staff" button.**

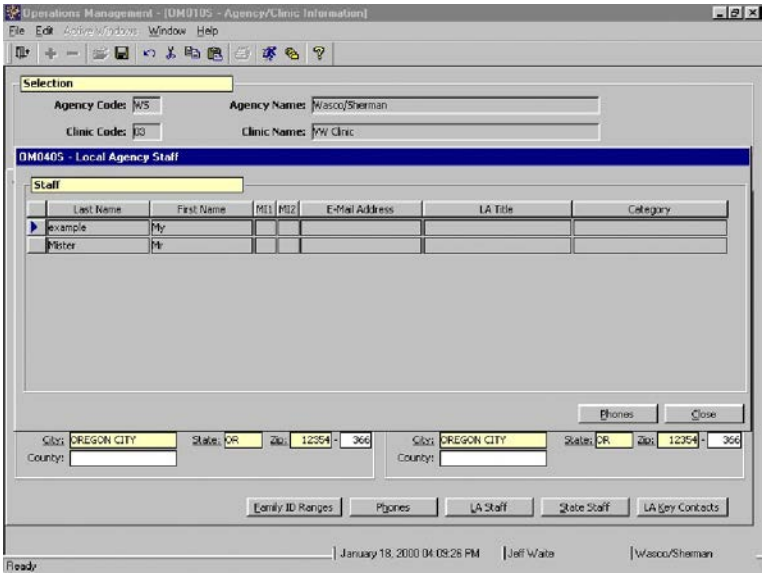


Figure 7: "Local Agency Staff" Pop-Up

- This is a display only screen which lists all the staff associated with this local agency.
- These fields are populated from the "Staff Information" screen.
- "Staff Category" indicates the work the staff person does in the clinic.
- The indicator arrow will allow you to choose a specific staff person by clicking on the indicator arrow box next to their name.
- The "Phones" button opens a pop-up with the selected employee's phone information.

10. **Close the "Local Agency Staff" pop-up.**

11. **Click on "State Staff" button.**

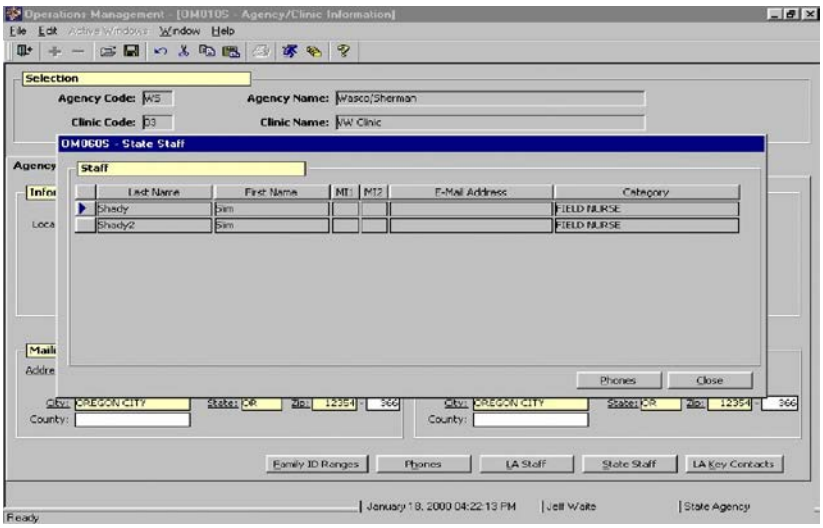


Figure 8: "State Staff" Pop-Up

- This is a display only screen which lists state WIC office staff.
- The indicator arrow and "Phone" button function the same as in the "Local Agency Staff" pop-up.

12. **Close the "State Staff" pop-up.**

13. **Click on the "LA Key Contacts" button.**

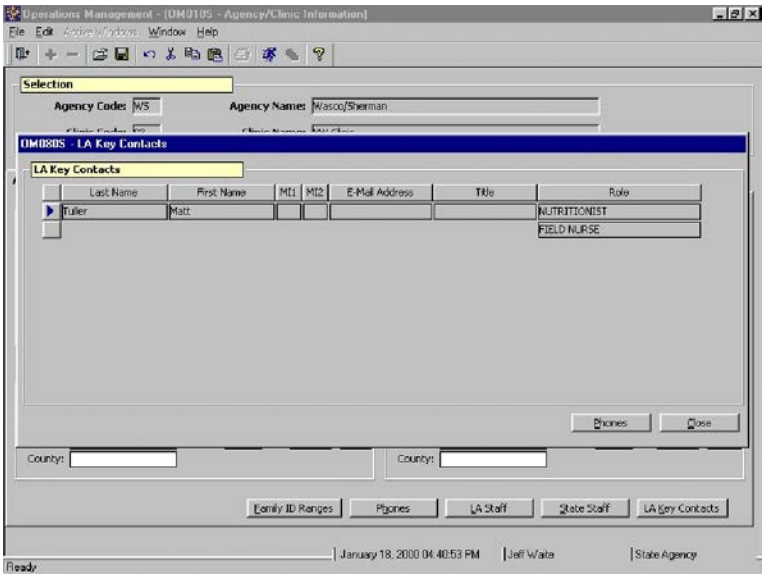


Figure 9: "LA Key Contacts" Pop-Up

- This is a display only screen which lists the local agency staff who are assigned the role of key contact.

- This role is assigned on the "Staff Information" screen.
- The indicator arrow and "Phone" button function the same as in the "Local Agency Staff" pop-up.

14. **Close the "LA Key Contact" pop-up.**

➥ *Practice Activities:*

For the following activity, use the Data Entry Document for "Agency/Clinic Information."

1. Open "Operations Management."
2. Select "Operations."
3. Select "Agency/Clinic Information."
4. Update the information for your agency.
5. Click on the "Phones" button.
6. Update or enter the information for your agency.
7. Click "OK."
8. Save.

Completing the "Clinic Information" Screen

The starting point for this section is:
Operations Management ⇨ Operations ⇨ Agency/Clinic Information

1. **Click on the "Clinic Information" tab.**

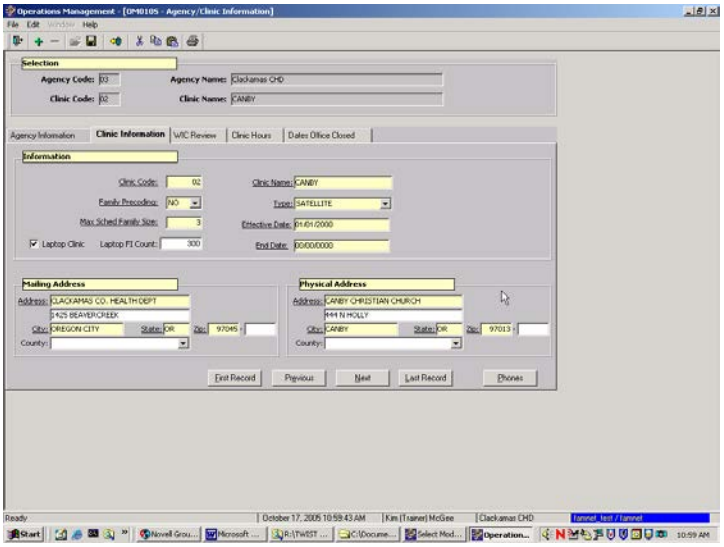


Figure 10: "Clinic Information" Screen

♫ NOTE: Every agency must have at least one clinic indicated as a permanent clinic, even if the address is the same as the agency with which it is associated.

♫ NOTE: If you are entering information for a new clinic, click the "Insert" icon to activate a new screen.

♫ NOTE: Once clinics are added they can only be deleted at the state level due to system integrity issues.

♫ NOTE: The "Clinic Hours" and "Dates Office Closed" tabs are connected to the clinic you have selected on this screen.

"Clinic Information" Fields

2. **Complete or update the fields on the "Clinic Information" screen**.

2.1 **"Clinic Code"** is the two-digit number assigned to the clinic.

2.2 **"Clinic Name"** is the name of the clinic.

♫ NOTE: Because the ANSWR appointment reminder system uses a "client friendly" clinic name in the voice, text, and email reminder messages, if your agency adds a new clinic or changes a clinic name you will need to let the State WIC office know so they can work with US Netcom to make a voice recording and the necessary data file adjustments. Please call App Support with your new or updated clinic information.

2.3 **"Family Pre-Coding"** is a Yes / No field that indicates if the clinic will allow family members to be scheduled as a family unit.

- This is a direct link to the Appointment Scheduler.
- When "No" is selected the family members' appointments will be scheduled according to predefined business rules. The default for this field is "no."
- When "Yes" is selected, the clinic will pre-code template/daily clinic schedules to allow certain times when family members can be scheduled as a unit.
- The state recommends that this field remains "No." Speak with a state staff member to discuss the ramifications of selecting "Yes."

2.4 The **"Type"** field has a drop down list for you to choose the type of clinic. A clinic can be designated as permanent, satellite or affiliated.

2.5 The **"Max Sched Family Size"** field specifies the number of family members you want the system to try to coordinate when the auto-scheduler runs.

- The default and maximum for this field is three.
- Any family larger than three will not be automatically scheduled and will be listed on the **"Appointment Auto Scheduler Unable to Schedule"** report.

2.6 The **"Effective Date"** field indicates the date this clinic began operations.

2.7 The **"Laptop Clinic"** check box indicates if this clinic in one that operates using laptop computers. This information can be used by the state to indicate clinics that are checked out on specific dates.

2.8 The **"Laptop FI Count"** field indicates the quantity of FI numbers needed for this clinic when it is downloaded onto the laptop. This number defaults to 300, but can be changed if more or less FIs are needed at a clinic on any given date. The number must be changed before the clinic is downloaded to the laptop.

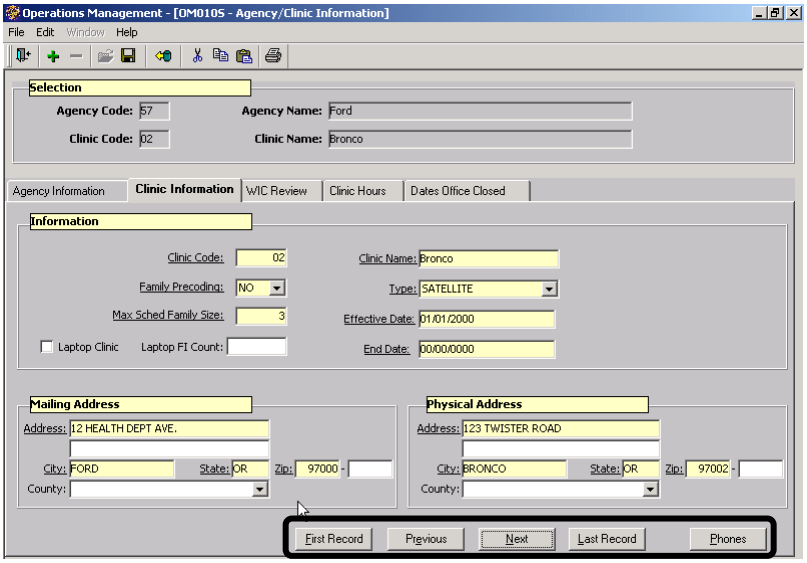
2.9 The **"End Date"** field indicates the date this clinic is no longer operational. This field makes this clinic unavailable for use in your agency after that date.

2.10 **"Mailing Address"** is this clinic's mailing address.

2.11 If the **"Physical Address"** is the same as the "Mailing Address" you only need to enter the information in the "Mailing Address" section and save. The address will be copied into the "Physical Address" fields.

- The physical address will be used for shipping to permanent clinics and on appointment notices to indicate appointment locations.

3. **Save.**



Saving activates the buttons at the bottom of the tab as well as the other two tabs on the screen.

"Clinic Information" Buttons

These buttons will allow you to search and retrieve information for the various clinics in your agency.

Figure 11: "Clinic Information" Buttons

- The **"First Record"** button will take you to the clinic with the lowest clinic code for your agency.
- The **"Previous"** button will take you to the previous clinic listed for your agency.
- The **"Next"** button will take you to the next clinic listed for your agency.
- The **"Last Record"** button will take you to the clinic with the highest clinic code listed for your agency.

4. **Click on the "Phones" button to enter the phone numbers for the clinic.**

   - Every clinic must have a "Client" phone type entered which will appear on appointment notices associated with that clinic.

5. **Click "OK" to close the "Phones" pop-up.**

Viewing the "WIC Review" Screen

The starting point for this section is:
Operations Management ⇨ Operations ⇨ Agency/Clinic Information

1. **Click on the "WIC Review" tab.**

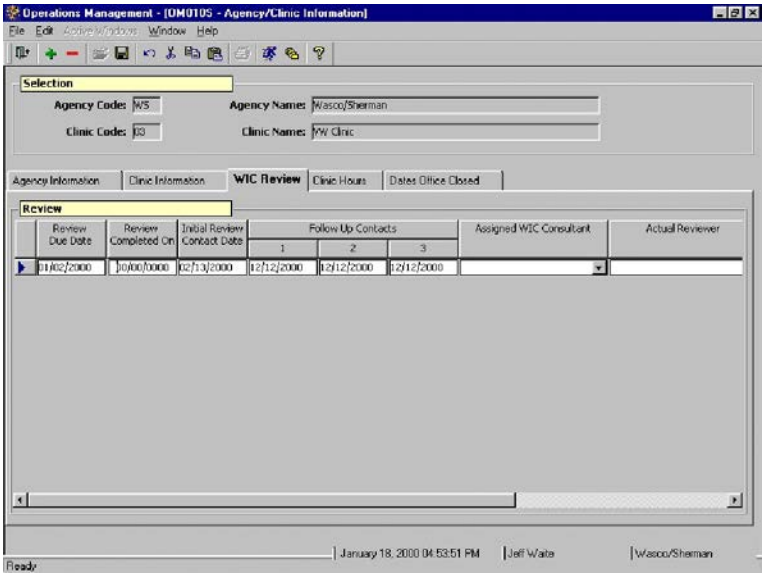


Figure 12: "WIC Review" Screen

- This screen is a display only screen for local agency staff.
- It is used by the state staff to enter, track, and schedule dates related to the biennial WIC program reviews of your agency.
- The name of the state staff member who was assigned to complete the review, as well as the name of the staff member who actually performed the review, is entered and tracked here.

Completing the "Clinic Hours" Screen

The starting point for this section is:
Operations Management ⇨ Operations ⇨ Agency/Clinic Information

1. **Click on the "Clinic Hours" tab.**

   This is where you document the hours of operation for the clinic. This creates a base table used for creating your appointment schedule. This is also where you may document the hours client phones are answered in your clinics. This is for your information only.

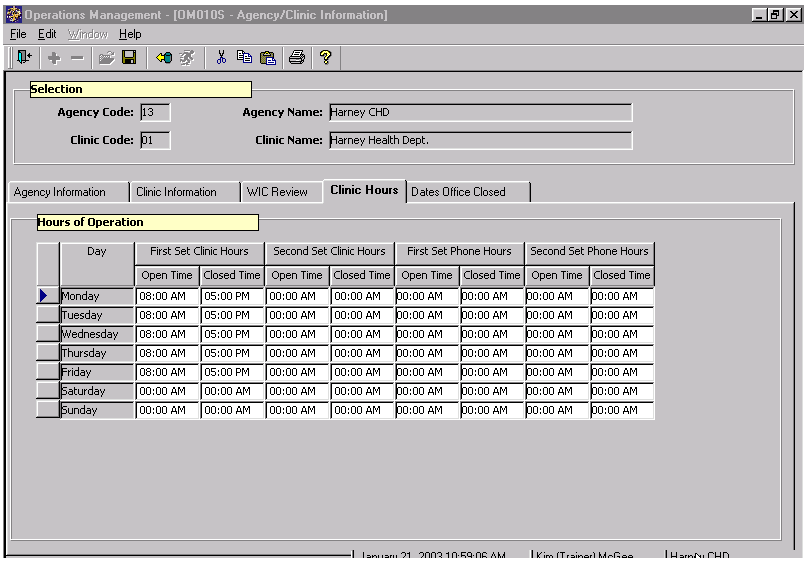


Figure 13: "Clinic Hours" Screen

2. **Complete or update the fields on the "Clinic Hours" screen**.

2.1 **"Day"** of the week is display only.

2.2 **"Open Time"** and **"Closed Time"** must be entered in a four-digit format followed by AM or PM.

Example: The correct format for 8 in the morning would be 08:00 AM.

To change from "AM" to "PM" enter the time, space, then press Shift "P." To change back to AM, place the cursor before PM and press Shift "A." Note that "AM" and "PM" must be capitalized.

2.3 The **"First Set Clinic Hours"** would be used for your morning hours. The "Closed Time" in this set would indicate the time you close for lunch.

2.4 The **"Second Set Clinic Hours"** would be used for your afternoon and evening hours. The "Open Time" should reflect when you reopen after lunch. The "Close Time" would indicate when the clinic closes for the day.

2.5 The **"First Set Phone Hours"** would be used for morning hours the phones are answered. The "Closed Time" in this set would indicate the time you close for lunch.

2.6 The **"Second Set Phone Hours"** would be used for hours phones are answered in the afternoon and evening. The "Open Time" should reflect when you start answering phones after lunch. The "Close Time" would indicate when the phones are no longer answered for the day.

♫ NOTE: If preferred, you may use just the "First Set" for the entire day.

3. **Save.**

Completing the "Dates Office Closed" Screen

1. **Click on the "Dates Office Closed" tab.**

This is where clinic closures are recorded. This screen is used in the Appointment Scheduler.

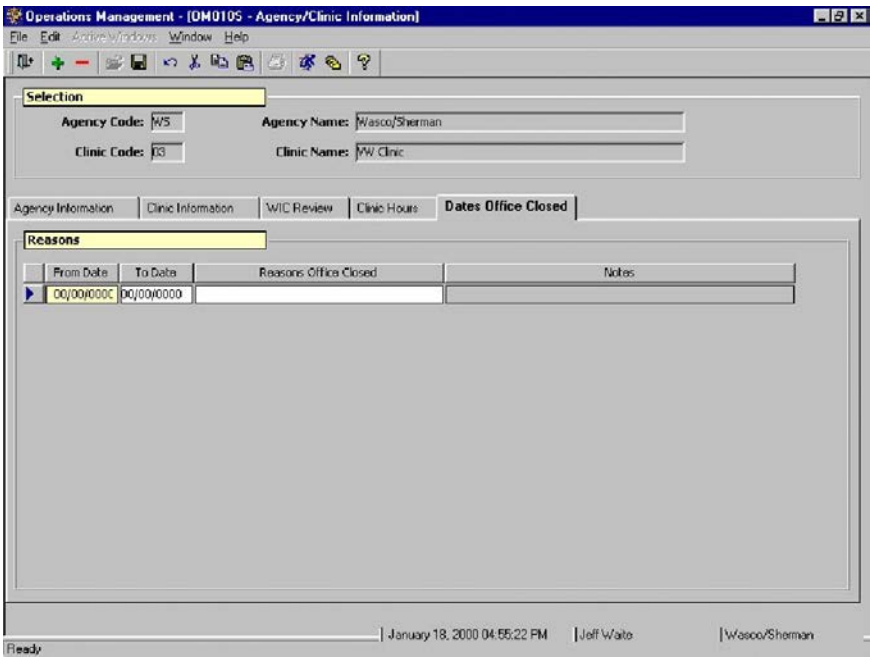


Figure 14: "Dates Office Closed" Screen

2. **Complete or update the fields on the "Dates Office Closed" screen.**

2.1 The **"From Date"** is the beginning date the clinic will be closed if it is to be closed over a range of dates. It is the only mandatory

field on the "Dates Office Closed" tab. It is the only date you need to enter if the clinic is only closed for one day.

2.2 The **"To Date"** is an optional field designating the ending day the clinic will be closed if closed for a range of days.

2.3 **"Reasons Office Closed"** is a free form field which allows you to state the reason for the closure.

Example: "TWIST training."

♫ NOTE: You do not need to enter weekends. The system will automatically assume the clinic is closed on weekends. You may schedule appointments on the weekends by changing times on the "Clinic Hours" screen or by using the "skip" function in "Template Maintenance." For further information see the "Template Maintenance" lesson in Chapter Four.

3. **Double click on the "Notes" field.**

- The field is in an inactive / display mode until you double click. Double clicking will open the "Notes" pop-up.
- You may enter free form notes about the reason the clinic is closed.

4. **Click on "OK."**

5. **Save.**

6. **Click on the "Agency Information" tab.**

You should now see that the "Clinic Code" and "Clinic Name" fields are populated.

7. **Exit the "Agency/Clinic Information" screen.**

8. **Exit the "Operations Management" window.**

✂ *Tips and Shortcuts:*

Military time: Military time is not accepted in TWIST.

➥ *Practice Activities:*

Use the Data Entry Document for "Agency/Clinic Information" to complete the following activities.

1. Open "Operations Management."
2. Select "Operations."
3. Select "Agency/Clinic Information."
4. Click the "Clinic Information" tab.
5. Complete or update all fields on "Clinic Information" screen with information from clinics in your agency.
6. Save.
7. Click the "Phones" button.
8. Correct the phone information for each clinic.
9. Close the "Phones" pop-up.
10. Click on the "Clinic Hours" tab.
11. Enter the hours for each clinic.
12. Save.
13. Click on "Dates Office Closed" tab.
14. Enter dates each clinic is closed during the next six months.
15. Save.
16. Click on the "Agency Information" tab.
17. Exit this screen.
18. Exit the "Operations Management" window.

✓ *Skill Check:*

Using the Data Entry Documents for your agency and clinics, review the agency and all clinic screens for completeness and correctness. Have the instructor use a different computer to check the information in the database. The instructor will initial your self-assessment checklist when all information is available in TWIST.

✍ *Notes:*

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Chapter 8: Operations Management
Section 1: Operations Management
Lesson: Special User – Staff Information

Objectives:

Upon completion of this lesson the user will be able to:
- accurately enter and save staff data to generate a staff ID;
- assign staff members to a specific local agency and one or more clinics within that local agency;
- correctly complete the "Staff Information" screen including the five pop-up windows;
- explain how staff information links to the Appointment Scheduler;
- correctly complete the "Job Description" screen;
- make a staff person inactive and then reactivate them by using the "End Date" field;
- explain the use of "generic" staff members; and
- establish and track mandatory and optional training for all local agency staff.

Oregon Policies:

- ♦ 145 State Office: Address & Staff
- ♦ 316 Annual Breakout of Staff Time
- ♦ 440 Nutrition Training Manual
- ♦ 660 Competent Professional Authority: Requirements
- ♦ 661 Competent Professional Authority/High-Risk Counseling

Overview:

The "Staff Information" function of the "Operations Management" module will allow you to create, view, and maintain data for staff members working within the WIC program.

There are three main sections:
- Staff Information;
- Job Description; and
- Staff Training.

In this lesson, you will learn how to use the first two sections to collect staff information and job description data. You will also learn how to enter and track staff training. This lesson will explain how staff information links with the Appointment Scheduler.

♫ **NOTE**: For this lesson you need to be logged on to TWIST in your local agency.

Instruction:

Accessing the "Staff Information" Screen

1. **Double click on the "Operations Management" icon.**

2. **From the "Operations" menu click on "Staff Information."**

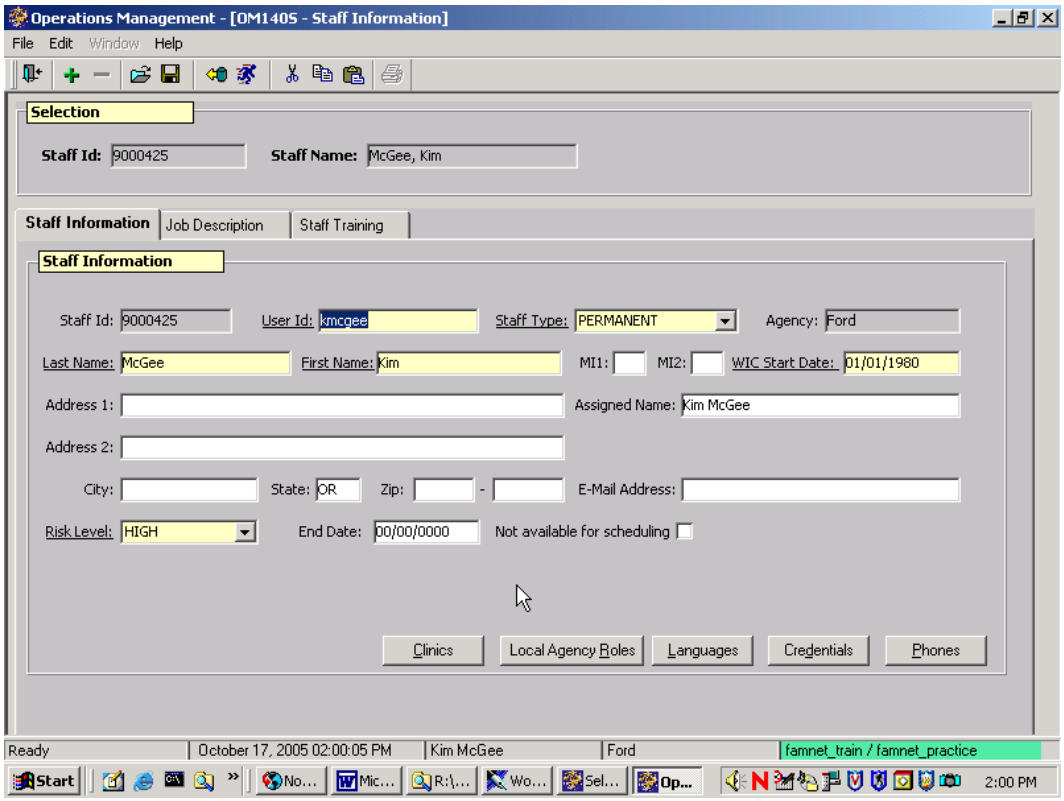


Figure 1: "Staff Information" Screen

The top part of the "Staff Information" screen is labeled "Selection." The "Staff ID" and "Staff Name" fields are blank but will be populated once you enter and save a new staff member's information in the "Staff Information" screen or after you retrieve an existing staff member's record.

Entering a New Staff Member

The starting point for this section is:

Operations Management ⇨ Operations ⇨ Staff Information

"Staff Information" Fields

1. **Complete the fields in the "Staff Information" screen.**

   1.1 "**Staff ID**" is a system-generated number assigned to a staff member.

- When entering a new staff member the system will automatically generate an ID number once the mandatory fields on this screen have been completed and saved.
- For an existing staff member the "Staff ID" field is populated from your search.

1.2 "**User ID**" is the same as the staff member's log on.

- Remember, the User ID is how all staff activity is tracked in the system.
- Use the standard ID convention used in your local agency.
- If staff work in more than one agency, the staff ID must be different in each agency.
- If you receive a duplicate error message, you must select a different ID.
- User ID here must match the User ID in Security, regardless of where it is entered first.

Example: The User ID is used to track who made a change in a client's record.

1.3 "**Staff Type**" is the type of position held by the staff member.

- There are several choices for staff type in the drop down list: permanent, temporary, and pseudo. Usually "Staff Type" will be permanent or temporary.
- Pseudo is used for appointment scheduling purposes and will be discussed later in the lesson.

1.4 "**Agency**" field is display only. This field defaults to the local agency associated with your User ID.

1.5 "**Name**" fields are mandatory except for the two "Middle Initial" fields.

1.6 "**WIC Start Date**" is the date the staff member started working with WIC. This date is linked with the "Staff Training" screen to be used to track a staff member's training and education requirements.

1.7 The "**Address**" fields including "**Email**" are optional. Line 1 and 2 for the residence address is for the first and second line of text in the staff member's address.

It is recommended to not enter in home information.

1.8 "**Assigned Name**" is the title displayed on the "Daily Clinic Schedule" screen in the "Appointment Scheduler" module.

- This field is optional unless you select "pseudo" in the "Staff Type" field.

- If this field is not completed, the real name of the staff person will display on your appointment schedule.

1.9 "**Risk Level**" is the WIC participant risk level the staff member is qualified to serve.

- This field links directly with the Appointment Scheduler to match clients with staff appropriately.
- A high risk level allows the staff member to see all clients, a staff member assigned a low risk level cannot see a client who is medium or high risk.

1.10 "**End Date**" is completed when you need to make a staff member inactive.

- Entering a current or future date indicates the day a staff member becomes inactive.
- To reactivate a staff member, either delete the date and leave the field blank or change the field to a future inactive date.

1.11 "**Not Available For Scheduling**" check box is checked if you do not want this staff person to be available on the "**Family Appointment Record**" screen. In this way, no client appointment requests can be generated for this staff person.

2. **Click on the "Save" icon.**

Once you have saved the data, the "Selection" area is populated and the remaining tabs are activated. On the "Staff Information" screen the "Staff ID" field is populated and the buttons at the bottom of the screen are activated.

"Staff Information" Buttons

3. **Click on the "Clinics" button.**

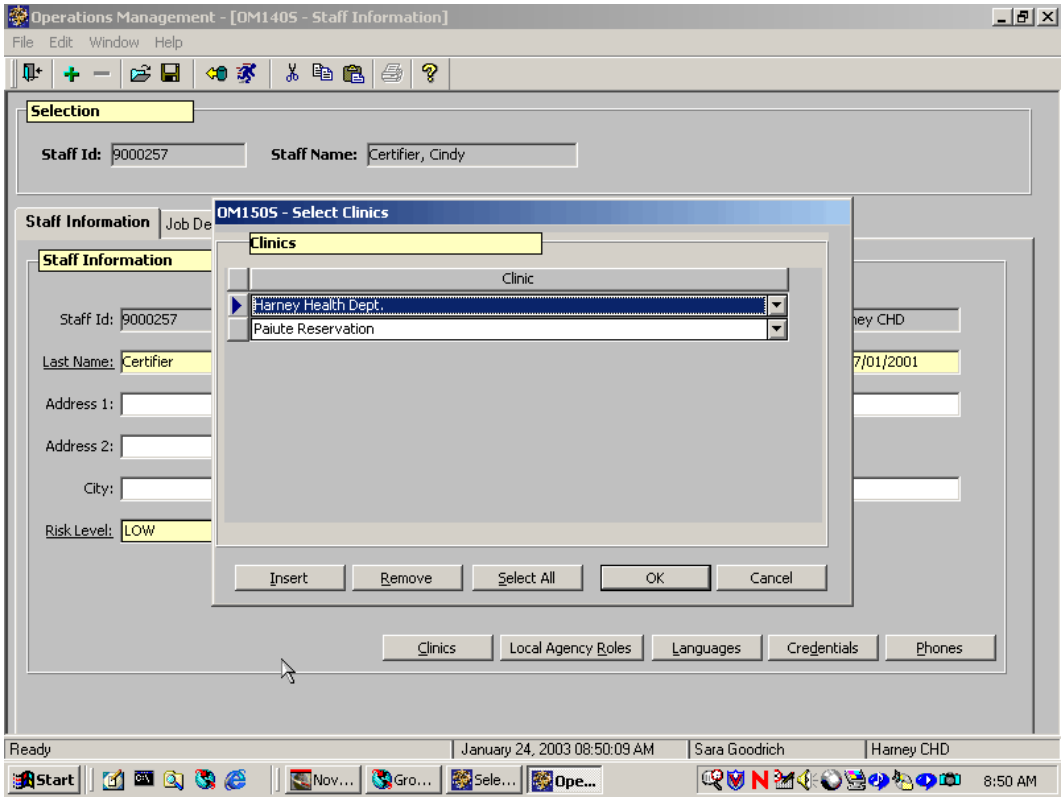


Figure 2: "Clinics" Pop-Up

This pop-up allows you to select and associate one or more clinics to each staff person. The data entered into this pop-up will link with Appointment Scheduler and "Agency/Clinic Information" screens.

3.1 The "**Clinic**" field displays a blank line with a drop down arrow. The drop down list is populated from the "Agency/Clinic Information" screens and lists all clinics associated with the user's local agency. Click on a clinic in the drop down list, it will automatically populate the blank line and close the list.

- To change a clinic on the staff member's list, move the indicator arrow next to the clinic line you want to change. Click on another clinic.
- To add a clinic to the staff member's list, use the **"Insert"** button to add a blank line, move the indicator arrow to the new line, and select another clinic.
- To delete a clinic from the staff member's list, move the indicator arrow to the clinic line you want to delete and click on the "**Remove**" button. A message will appear: "Are you sure you wish to remove this row?" Select the "Yes" or "No" button below the message to delete the text or cancel your request. You will remove one line at a time.
- Clicking the "**Select All**" button associates all clinics with the staff member.

- Clicking "**OK**" saves the information and closes the pop-up window.
- To remove a staff person from appearing on the drop down in the "**Daily Clinic Schedule**," remove all clinics in this pop up.

4. **Click on the "Local Agency Roles" button.**

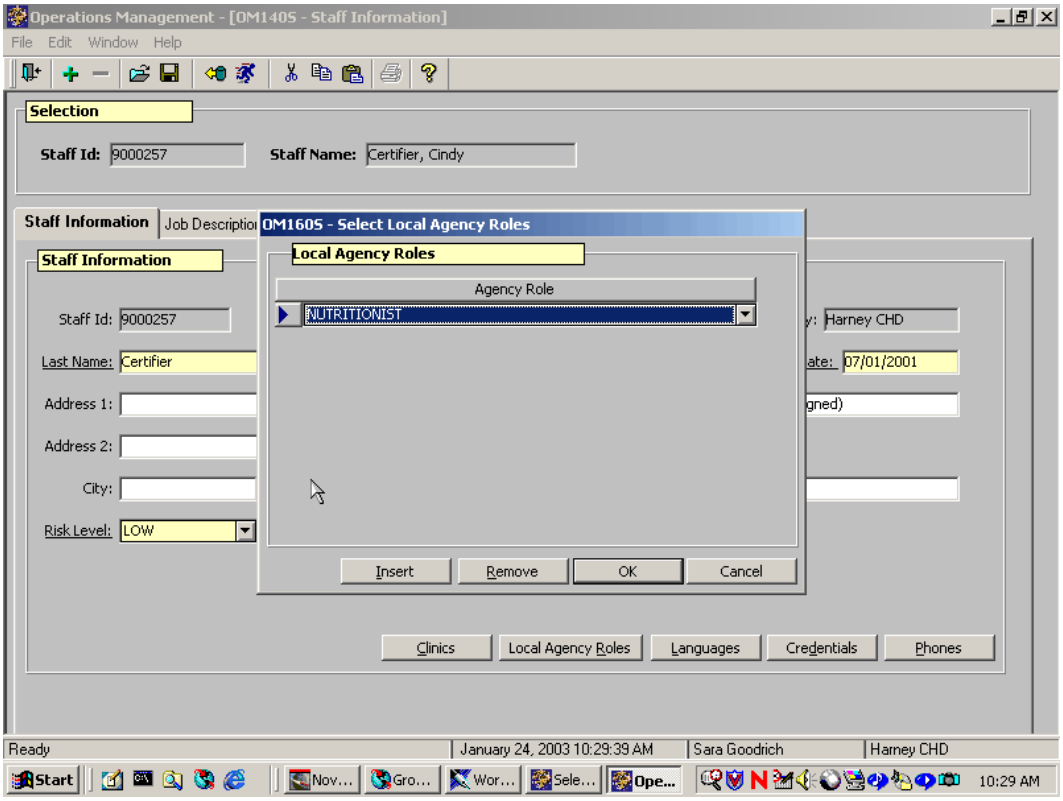


Figure 3: "Local Agency Roles" Pop-Up

- Local agency roles are used to show key contacts at each local agency.
- This pop-up allows you to assign one or more roles to a staff member. Some staff may not have a role because they are not a key contact.
- The buttons on the pop-up work the same way as the "Clinic" pop-up. To add additional roles, use the "Insert" button to add a blank line, move the indicator arrow to the new line, and select another role.

5. **Select the role(s) from the drop down list and click "OK" to save.**

☺ See Job Aid "Local Agency Roles" for more information.

6. **Click on the "Languages" button**.

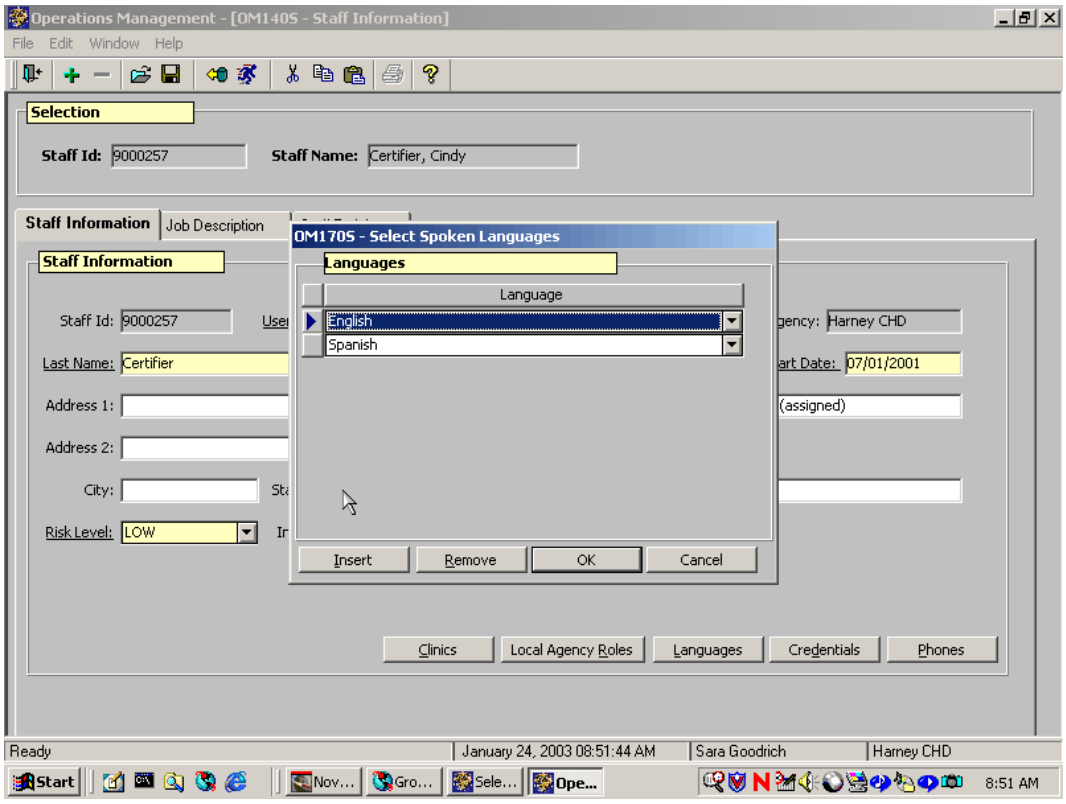


Figure 4: "Languages Pop-Up

This pop-up allows you to enter different languages spoken by a staff member.

- This information links directly to the Appointment Scheduler as a criterion for matching a client to a staff member.
- The pop-up will default to English unless you select another language.
- The buttons on the pop-up work the same way as the "Clinics" pop-up.

7. **Select the appropriate languages from the drop down list and select "OK."**

8. **Click on the "Credentials" button.**

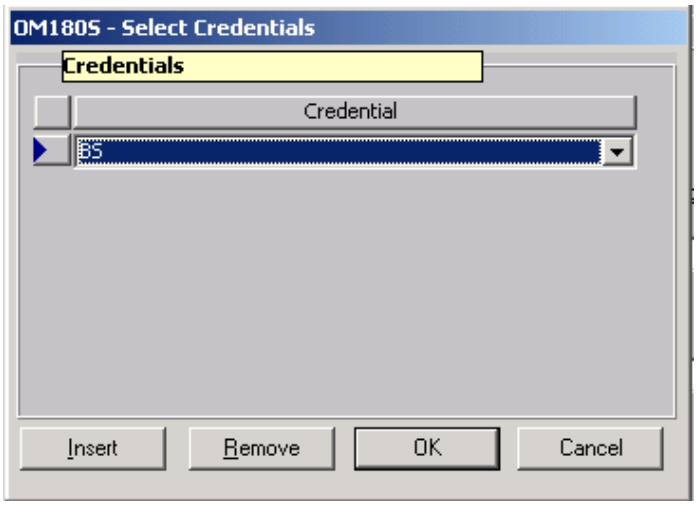


Figure 5: "Credentials" Pop-up

- This pop-up allows you to enter your staff member's various professional and educational credentials.
- The buttons on the pop-up work the same way as the "Clinics" pop-up.

9. **Select the credentials from the drop down list and select "OK**."

10. **Click on the "Phones" button.**

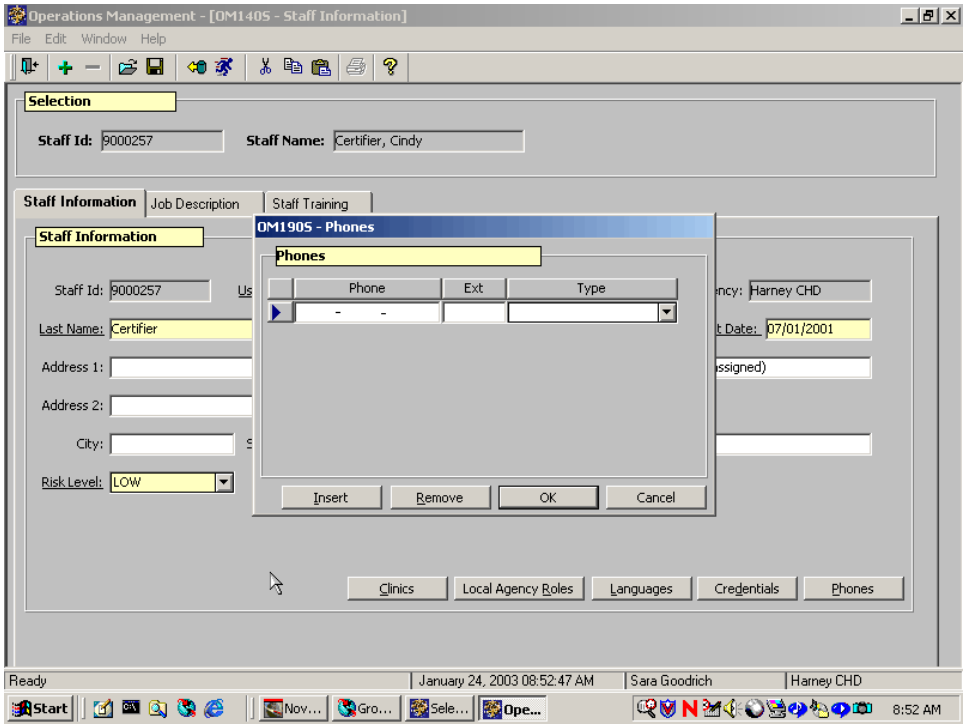


Figure 6: "Phones" Pop-Up

- This pop-up allows you to enter phone numbers for your staff member and indicates the type of phone using the drop down arrow.

- You will need to click on the "Insert" button each time you add any new numbers and the "Remove" button to delete any old numbers.
- It is recommended to not enter home phone numbers.

11. **Enter in the phone numbers and select the correct type for each number from the drop down list and select "OK."**

    You are now back at the "Staff Information" screen.

12. **Click on the "Insert" icon to clear the information on the screen.**

♫ **Note:** The "Selection" section and all three tabs are blank. You are ready to add more new staff members.

➥ *Practice Activity #1:*

Use the information from your Data Entry Document for this practice. You will be entering information about yourself.

1. Open "Operations Management."
2. From the "Operations" menu select "Staff Information."
3. Enter your User ID into the "User ID" field.
4. Select your staff type, probably permanent, using the drop down arrow for "Staff Type."
5. Enter your last name into the "Last Name" field.
6. Enter your first name into the "First Name" field.
7. Enter your middle initial into the "Middle Initial" box.
8. Enter the date you started working for WIC into the "WIC Start Date" field.
9. Enter your address into the "Address" fields.
10. Enter the name you usually go by in the "Assigned Name" field if it is different than your first and last name.
11. Enter your E-Mail address into the "E-Mail Address" field.
12. Select the WIC participant risk level you are qualified to serve from the drop down arrow for "Risk Level."
13. Enter today's date into the "Inactive Date" field.
14. Save.
15. Click on the "Clinics" button.
16. Select the clinics where you work using the drop down arrow.
17. Click "OK."
18. Click on the "Local Agency Roles" button.
19. Select the roles you fill for your agency using the drop down arrow.
20. Click "OK."
21. Click on the "Languages" button.
22. Select the languages you speak using the drop down arrow.
23. Click "OK."
24. Click on the "Credentials" button.
25. Select your credentials using the drop down arrow.
26. Click "OK."

27. Click on the “Phones” button.
28. Enter your phone number(s) and select the type of phone(s) using the drop down arrow.
29. Click “OK.”
30. Exit back to the “Select Modules” screen.

Retrieving an Existing Staff Record

The starting point for this section is:
Operations Management ⇨ Operations ⇨ Staff Information

1. **Click on the “Open” icon.**

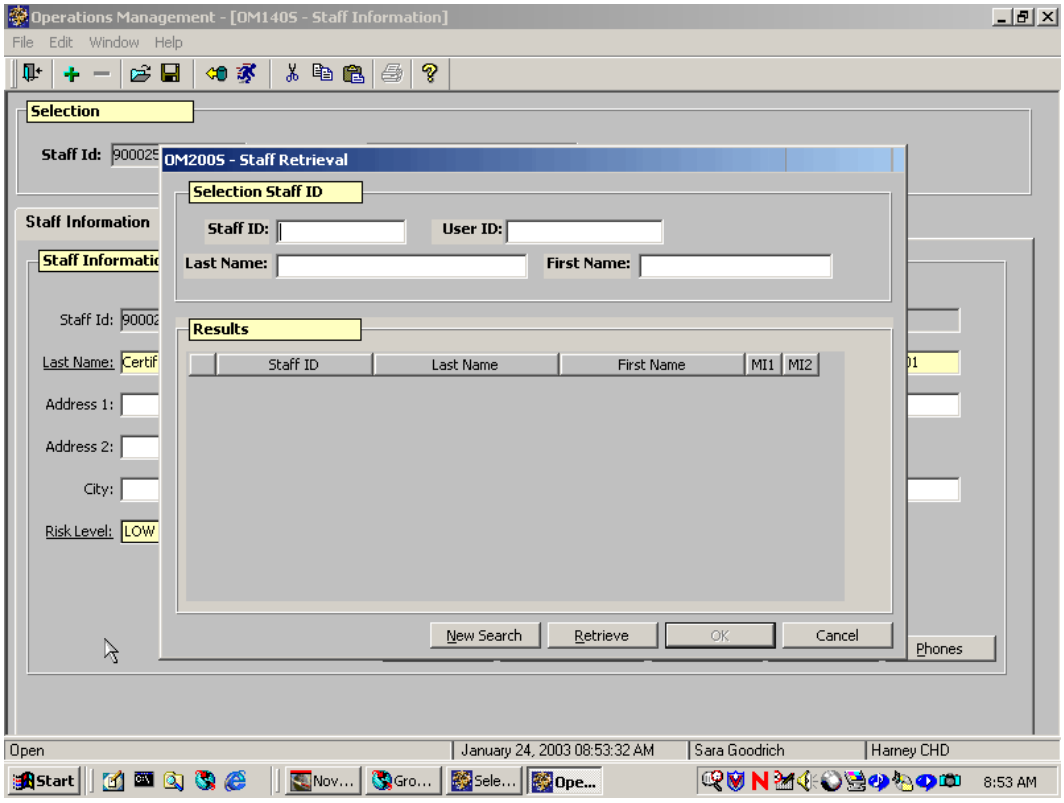


Figure 7: “Staff Retrieval” Pop-Up

This will open the “Staff Retrieval” pop-up.

The “Selection” section is used to search for a staff member using the three fields. You can search by one or more of the following:

- Staff ID;
- Last Name; and
- First Name.

If you do not know the full name you can also enter partial spelling; however, the more information you enter, the better your search results will be.

Example: If a staff member's name is Betty Jones, you can enter "J" into the last name field to bring up all last names starting with the letter "J." To narrow your search, enter in the last name "Jones" to bring up all staff with the last name "Jones." Entering in the entire first and last names will narrow your search even more.

2. **Complete the "Last Name" field.**

3. **Click on the "Retrieve" button at the bottom of the pop-up.**

   This populates the "Results" section with all the names that met your search criteria. If a retrieval populates more than one page of results, you will use a scroll bar to move through the names.

4. **Click on the staff member you would like to retrieve, then click "OK."**

   The "Staff Retrieval" pop-up is closed and you are now back at the "Staff Information" screen. Notice the "Selection" section is populated with the staff member's name and ID number and the screen now shows this person's staff record information.

   To modify the record, move your cursor to the appropriate field(s) and make the change. Remember to save your modifications.

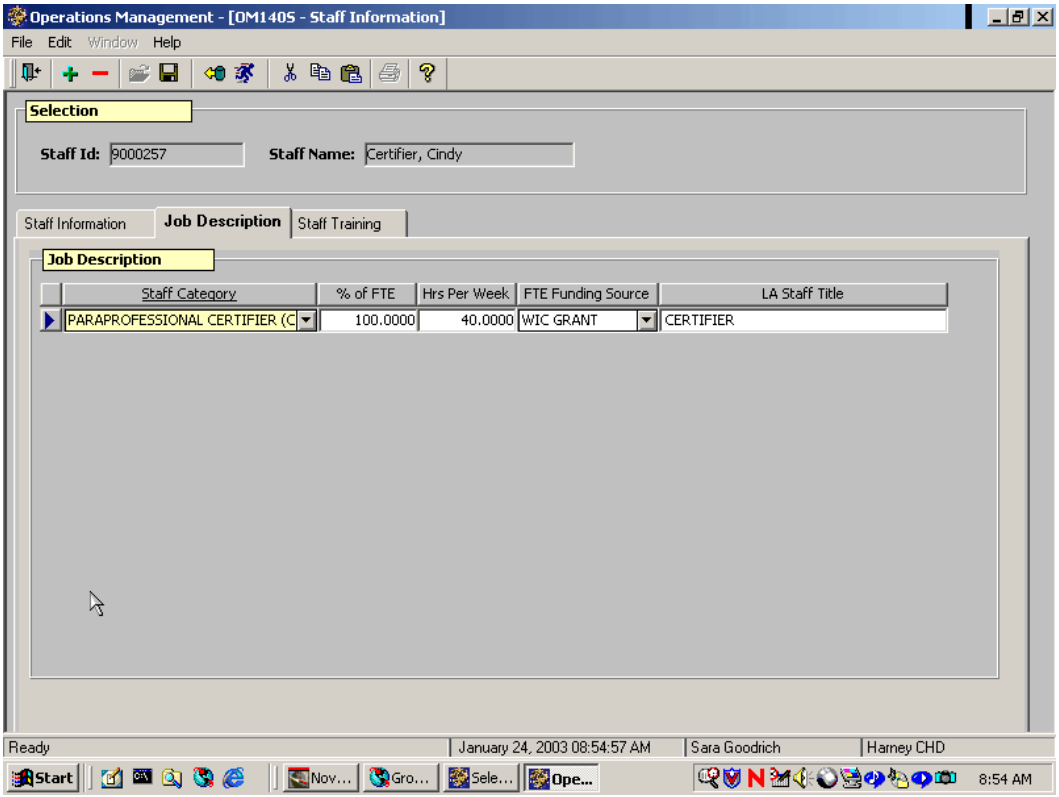
5. **Exit back to the "Select Modules" screen.**

Completing the "Job Description" Screen

The starting point for this section is:
Operations Management ⇨ Operations ⇨ Staff Information

1. **Click on the "Job Description" tab.**

Figure 8: "Job Description" Screen



Information collected in this screen links to caseload management reports and is used to determine staffing levels and scheduling.

2. **Complete the fields on the "Job Description" screen.**

2.1 "**Staff Category**" is a drop down list of various staff positions.

- You may enter more than one staff category for each staff person.
- To add an additional staff category use either the "Insert" icon to add a blank line or tab out of the last field, "LA Staff Title," and this will create a new blank line with the cursor in the first field of "Staff Category."
- To remove a staff category, use the "Remove Record" icon. A message will appear: "Are you sure you wish to remove this row?" Select the "Yes" or "No" button below the message to delete the text or cancel your request. You will remove one line at a time.

2.2 "**% of FTE**" is the percent of a full time equivalent a staff person is assigned for a staff category. Enter in the percent as a whole number (XX) or as a decimal (.XX). Do not use a percent sign. Whole numbers are changed to a decimal.

2.3 "**Hours Per Week**" is the number hours a staff person is assigned to a staff category.

2.4 "**FTE Funding Source**" is the funding source under which a staff person is budgeted for that staff category.

2.5 "**LA Staff Title**" is a free form text line to allow you to personalize the staff category by entering in your local agency's title for the category.

3. **Save.**

Completing the "Staff Training" Screen

The starting point for this section is:
Operations Management ⇨ Operations ⇨ Staff Information

1. **Click on the "Staff Training" tab.**

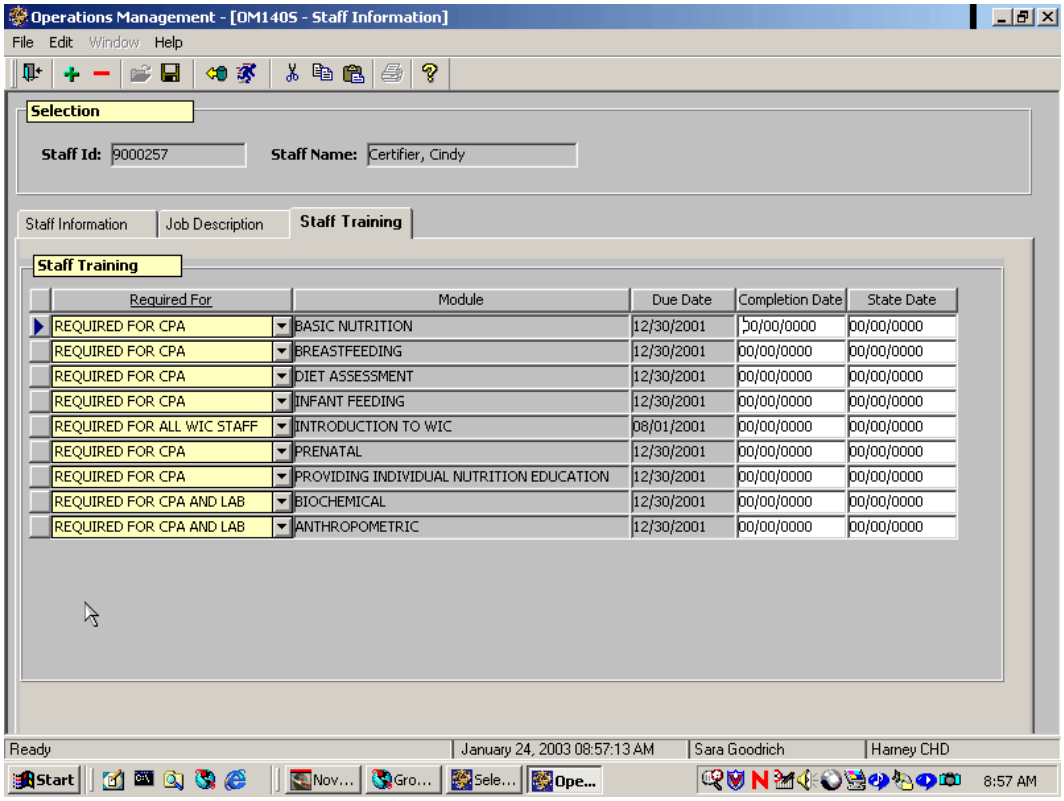


Figure 9: "Staff Training" Screen

- This screen tracks both mandatory and optional training needed to meet the educational requirements for a staff member including training needed to be a Competent Professional Authority (CPA).
- When you access this screen, the "All WIC" category under the "Required For" field is system generated and displays assigned modules. "All WIC" is the only category where mandatory training is automatically assigned by the TWIST system.

2. **Click on the "Insert" icon to add a blank line and enter in new information**.

   We will now review how to enter in information for categories other than "All WIC."

   2.1 The "**Required For**" field indicates for whom the training is required.

   Example: Select "CPA" to select the training required for a CPA.

   - Notice this field becomes mandatory once you click on the "Insert" button.
   - When you select a staff category from the drop down list the next two fields, "Module" and "Due Date" will be automatically populated.

   2.2 The "**Module**" field displays a list of all training modules required for the staff category selected.

   2.3 The "**Due Date**" field displays the date the training needs to be completed. The "Due Date" is automatically calculated based on the "WIC Start Date" and information entered by the state pertaining to each module.

   2.4 The "**Completion Date**" field is the actual date the training was completed and is entered in by the assigned local agency staff member(s).

   2.5 The "**State Date**" field is the date the state will be sending stickers and certificates to show the training course was completed.

3. **Save**.

4. **Exit back to the "Select Modules" screen.**

Adding a New Required Training Module to an Existing Staff Member

1. Retrieve the staff member on the "**Staff Information**" screen.

2. Click on the "**Staff Training**" tab.

3. Click the **+** icon to add a new row.

4. Select the appropriate "**Required For**" from the drop down. (E.g. select "Required for CPA")
    - Any new modules required for that type of staff member that are not already listed will populate the tab.

5. Enter the correct completion dates for the new modules in the "**Completion Date**" field.

♫ **Note**: If a new module replaces a module that the staff member has already completed, both modules will be listed. If the staff member does not have to complete the new module, you may either leave the field blank or fill the date field with nines (9) to indicate a void field. Either of these options will show on the Modules Completed reports. If the staff member does complete the new module the date can be changed to the actual completion date.

Using the "Modules Completed" Reports

Starting point is Operations/Management ➔ Outputs ➔ NE Training ➔ Modules Completed

The **"Module Completed"** report can be used to show the status of module completion for agency staff. The report can be sorted by Staff Name, Module Title, and Modules Completed/Not Completed.

1. Select the "**Report Type**" and other selection criteria from the drop down.

2. Click "**Run**".

3.

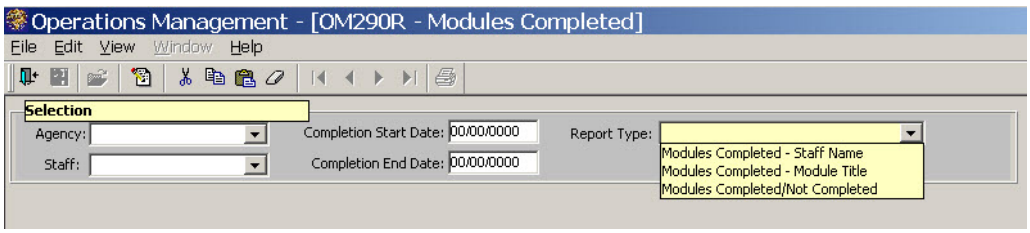
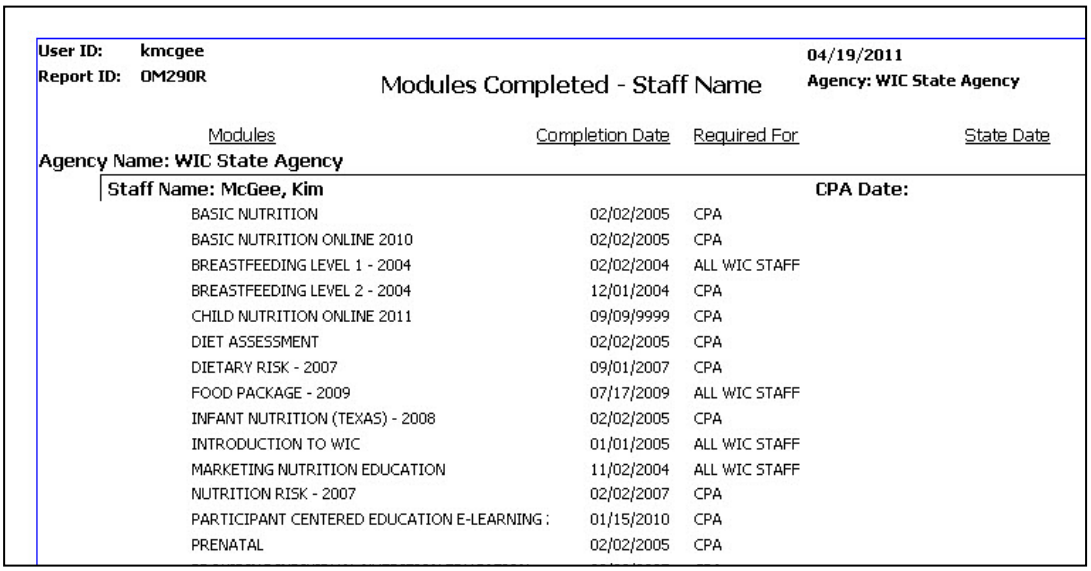


Figure 10: "Modules Completed" Screen

Report Types Defined

- **Modules Completed – Staff Name** lists only the modules which have a completion date entered for those staff selected (either individually or for the agency depending on the criteria selected). This list can be compared to the module completion requirements listed for each WIC staff role in Policy 440 to identify any modules which need to be completed.



User ID: kmcgee
Report ID: OM290R

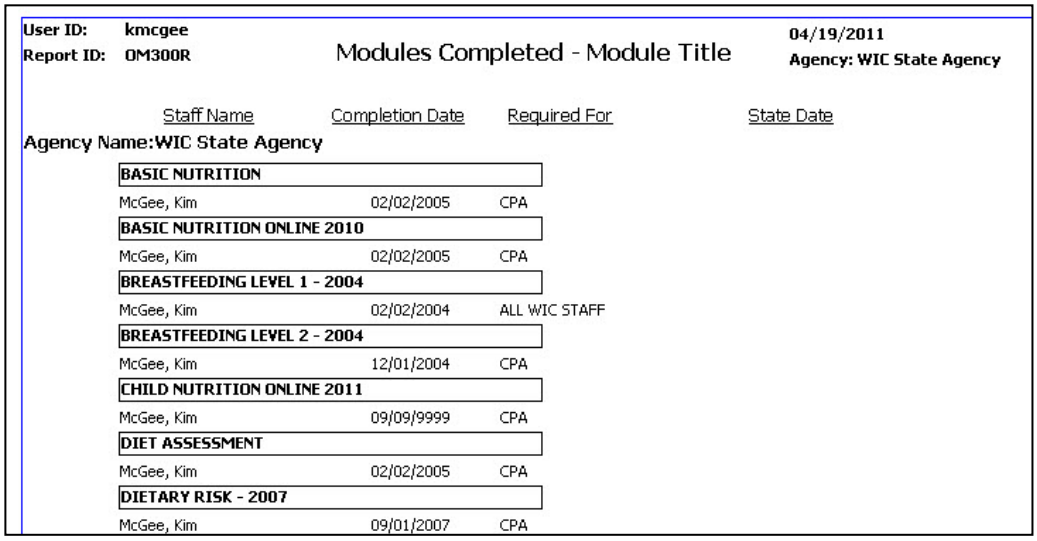
Modules Completed - Staff Name

04/19/2011
Agency: WIC State Agency

Modules	Completion Date	Required For	State Date
Agency Name: WIC State Agency			
Staff Name: McGee, Kim			CPA Date:
BASIC NUTRITION	02/02/2005	CPA	
BASIC NUTRITION ONLINE 2010	02/02/2005	CPA	
BREASTFEEDING LEVEL 1 - 2004	02/02/2004	ALL WIC STAFF	
BREASTFEEDING LEVEL 2 - 2004	12/01/2004	CPA	
CHILD NUTRITION ONLINE 2011	09/09/9999	CPA	
DIET ASSESSMENT	02/02/2005	CPA	
DIETARY RISK - 2007	09/01/2007	CPA	
FOOD PACKAGE - 2009	07/17/2009	ALL WIC STAFF	
INFANT NUTRITION (TEXAS) - 2008	02/02/2005	CPA	
INTRODUCTION TO WIC	01/01/2005	ALL WIC STAFF	
MARKETING NUTRITION EDUCATION	11/02/2004	ALL WIC STAFF	
NUTRITION RISK - 2007	02/02/2007	CPA	
PARTICIPANT CENTERED EDUCATION E-LEARNING :	01/15/2010	CPA	
PRENATAL	02/02/2005	CPA	

Figure 11: "Modules Completed – Staff Name" Report

- **Modules Completed – Module Title** lists all modules and the staff which have a completion date entered for that module. By comparing the names on this report to the staff in your agency who should complete the module, you can identify any staff who still need to complete the module.



User ID: kmcgee
Report ID: OM300R

Modules Completed - Module Title

04/19/2011
Agency: WIC State Agency

Staff Name	Completion Date	Required For	State Date
Agency Name:WIC State Agency			
BASIC NUTRITION			
McGee, Kim	02/02/2005	CPA	
BASIC NUTRITION ONLINE 2010			
McGee, Kim	02/02/2005	CPA	
BREASTFEEDING LEVEL 1 - 2004			
McGee, Kim	02/02/2004	ALL WIC STAFF	
BREASTFEEDING LEVEL 2 - 2004			
McGee, Kim	12/01/2004	CPA	
CHILD NUTRITION ONLINE 2011			
McGee, Kim	09/09/9999	CPA	
DIET ASSESSMENT			
McGee, Kim	02/02/2005	CPA	
DIETARY RISK - 2007			
McGee, Kim	09/01/2007	CPA	

Figure 12: "Modules Completed – Module Title" Report

- **Modules Completed/Not Completed** lists all the modules listed for staff on their "Staff Training" tab with any "Completion Date" data that has been entered. Modules will be listed in alpha order. Compare modules listed in the report with the module completion requirements listed for each WIC staff role in Policy 440 to identify any modules which need to be completed.

♫ **Note**: The disadvantage of the *Modules Completed/Not Completed* report compared to the *Modules Completed – Staff Name* report is that the list may include 2 versions of the same module. For example, *Basic Nutrition* indicates the discontinued pen and paper module which was replaced with the *Basic Nutrition Online 2010* module. Staff need to have completed one or the other, not both. The completion date for the extra module may be filled with nines to indicate a void field.

Modules	Completion Date	Due Date	Required For
AgencyName: WIC State Agency			**Current Date: 04/19/20**
Staff Name: McGee, Kim	**Start Date: 08/01/2004**	**Time Worked: 6 yr. 8 mo.**	**CPA Date:**
BASIC NUTRITION	02/02/2005	01/30/2005	CPA
BASIC NUTRITION ONLINE 2010	02/02/2005	01/30/2005	CPA
BREASTFEEDING LEVEL 1 - 2004	02/02/2004	11/01/2004	ALL WIC STAFF
BREASTFEEDING LEVEL 2 - 2004	12/01/2004	11/01/2004	CPA
CHILD NUTRITION ONLINE 2011	09/09/9999	01/30/2005	CPA
DIET ASSESSMENT	02/02/2005	01/30/2005	CPA
DIETARY RISK - 2007	09/01/2007	01/30/2005	CPA
FOOD PACKAGE - 2009	07/17/2009	01/30/2005	ALL WIC STAFF
INFANT NUTRITION (TEXAS) - 2008	02/02/2005	01/30/2005	CPA
INTRODUCTION TO WIC	01/01/2005	09/01/2004	ALL WIC STAFF
MARKETING NUTRITION EDUCATION	11/02/2004	11/01/2004	ALL WIC STAFF
NUTRITION RISK - 2007	02/02/2007	01/30/2005	CPA
PARTICIPANT CENTERED EDUCATION E-LEARNING :	01/15/2010	01/30/2005	CPA
PRENATAL	02/02/2005	01/30/2005	CPA
PRENATAL NUTRITION ONLINE 2010		01/30/2005	CPA
PROVIDING INDIVIDUAL NUTRITION EDUCATION	02/02/2005	01/30/2005	CPA

Figure 13: "Modules Completed – Module Title" Report

Completing the "Staff Training" Screen for BFPC Staff (Peer Counselors and Coordinators)

1. Retrieve the staff member on the "**Staff Information**" screen.

2. Click on the "**Staff Training**" tab.
   - The modules that are required for all staff are automatically listed.

3. Click the **+** icon to add a new row.

4. Select "Required for BF Peer Counselors" from the "**Required for**" drop down.
   - The two additional modules that are required for peer counselors or BFPC Coordinators will populate the tab. The 2 modules listed will begin with (BFPC) but are the same modules as the *Breastfeeding Level 2 – 2004* and the *Participant Centered Education E-Learning* modules that are also required for CPA's.

5. Enter the correct "**Completion date"** for the modules once they have been completed according to the Training Supervisor.

♫ **Note**: Some modules are required for more than one staff type. Select the "Required for" staff type with the highest level of training requirements. For example, for staff who are both CPA's and Breastfeeding Peer Counselors, select the "Required for CPA". The training requirements for either position will be on the list because those required for BF peer counselors is a subset of those required for CPA's.

➥ *Practice Activity #2:*

Continue using the information from your Data Entry Document.

1. Open "Operations Management."
2. From the "Operations" menu select "Staff Information."
3. Click on the "Open" icon to search for your record using the "Staff Retrieval" pop-up.
4. Enter your last name into the "Last Name" field.
5. Click on the "Retrieve" button to populate the "Results" section.
6. Select your name.
7. Click on "OK" to close the "Staff Retrieval" pop-up and to populate the "Staff Information" screen with your record.
8. Click on the "Job Description" tab.
9. Select your staff categories using the drop down arrow.
10. Enter your percent full time equivalent.
11. Enter the number of hours you work per week.
12. Select your FTE funding source using the drop down arrow.
13. Enter your staff title.
14. Save.
15. Click on the "Staff Training" tab.
16. Click on the "Insert" icon to add a blank line.
17. Select the "Required For" for training for your job category to populate the "Modules" field using the drop down arrow.
18. Using the Staff Training Nutrition Education Awards of Completion enter in the module completion dates.
19. Save.
20. Exit back to the "Select Modules" screen.

✂ *Tips and Shortcuts:*

- **In the "Results" section of the "Staff Retrieval" pop-up**, double clicking on the name will also select the staff member and close the pop-up.

- To remove a staff person from the "**Daily Clinic Schedule**" and the "**Family Appointment Record**," remove all clinics associated with the staff and check the "**Not Available for Scheduling**" check box.

- **End Date:** This field is generally used for temporary employees and to indicate when an employee no longer works for that WIC agency.

- **"Staff Training"** screen: You cannot delete a mandatory training module. If you try to delete an error message will occur stating: "Cannot delete this WIC training."

- **Using "Staff Information" for the Appointment Scheduler:** The "Assigned Name" field on the "Staff Information" screen is the name that is used on the "Daily Clinic Schedule" screen in the Appointment Scheduler. If your agency prefers to keep appointment schedules more generic and does not list staff members by name on the appointment schedule you would select pseudo as the staff type. Selecting pseudo will allow you to list staff generically, such as Certifier 1, Certifier 2, etc., rather than by actual staff name. When you select pseudo as staff type, the "Assigned Name" field will turn yellow to signal that it is now mandatory to complete.

- Each staff person needs to be associated with at least one clinic in TWIST in order for their module completion information to display on the **Modules Completed** report.

Example: Your agency uses Extension staff to teach nutrition education classes. This person is not really a WIC staff member so their staff type would be pseudo.

➥ *Practice Activities:*

Choose another staff member from your agency and enter all the information from their Data Entry Document.

1. Complete the "Staff Information" screen including the "Clinics" button, "Local Agency Roles" button, "Languages" button, "Credentials" button, and "Phones" button.
2. Complete the "Job Description" screen.
3. Complete the "Staff Training" screen.

✓ Skill Check

1. Continue to enter staff information for your agency.

2. Circle the correct answers for each of the following questions.
   A. Which **three** fields or buttons from the "Staff Information" screen **do not** link with the Appointment Scheduler?
      a. "Middle Initial"
      b. "Staff Type"
      c. "Clinic" button
      d. "Assigned Name"
      e. "Language" button
      f. "Email"
      g. "Credentials" button
      h. "Risk Level"
      i. "Inactive Date"

B. When would you use a “pseudo” staff type?
   a. For staff members who do many different kinds of work.
   b. To have your appointment schedule display “generic” staff member names or titles instead of real staff member names.
   c. For a staff member who works less than 40 hours a week.
   d. For staff members who don’t actually do any work.

Notes:

Chapter 8: Operations Management
Section 1: Operations Management
Lesson: Special User – Referral/Outreach Organizations

Objectives:

Upon completion of this lesson the user will be able to:
- create and update information on referral and outreach organizations;
- maintain the referral and outreach resource list; and
- and track outreach activities.

Oregon Policies:

- 470 Local Program outreach
- 880 Referrals: Alcohol, Tobacco & Other Drug Use
- 885 Other Referrals: Required & Recommended

Overview:

Referring participants to other assistance and support programs is a vital part of WIC services. Keeping up-to-date, accurate information on all of the agencies to which you refer participants and their programs is a big task. TWIST can help complete that task more efficiently. It can also keep a current list of all organizations that refer participants to WIC.

TWIST provides a function to record information about Referral and Outreach Organizations, including the address, phone numbers and primary contact individuals. This is done on the "Referral/Outreach Organization" window. The information you enter here will populate the "Referrals" drop down lists on the "Nutrition Education" and "Enrollment" screens and the "Organizations" drop down list on the "Non-WIC Nutrition Education" screen.

TWIST also enables documentation of all outreach communication with these organizations. Through the "Communications" screen, it is possible to record and review all types of correspondence with both Referral and Outreach organizations. Tracking outreach activities will much easier and more convenient to update.

Instruction:

Completing the "Referral/Outreach Information" Screen

The starting point for this section is:

Operations Management ⇨ Operations ⇨ Referral Organizations

1. **Click "Organizations" from the drop down menu.**

   The top section of the screen is titled "**Selection**." You will learn to select an existing referral agency later in this lesson. First, you must learn to enter a new organization on the "**Referral/Outreach Info.**" screen.

2. **Click on the "Insert" icon to activate the "Referral/Outreach Info." tab.**

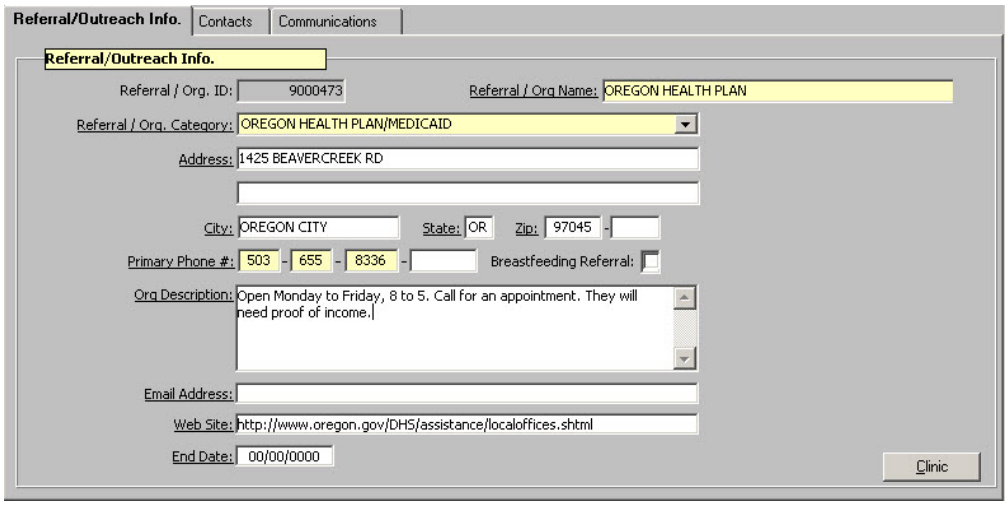


Figure 1: "Referral/Outreach Information" Screen

This will allow you to enter information for a new organization. Information entered here will also be used in drop down lists in certification.

3. **Complete the fields in the "Referral/Outreach Information" screen.**

   3.1 "**Referral/Org. ID**" is a system-generated number assigned to an organization.

   - When entering a new organization, the system will automatically generate an ID number once the mandatory fields within this tab have been completed and saved.

   3.2 "**Referral/Org. Name**" is the name of the organization.

   3.3 "**Referral/Org. Category:**" Select the appropriate category from the drop down list.

   3.4 "**Address**" is the organization's address, including City, and Zip Code.

- The "**State**" field is automatically populated with "**OR**."
- There is a space to fill in the extended Zip Code, if known.

3.5 "**Primary Phone #:**" is the participant contact phone number of the organization.

- All phone numbers should be entered starting with the area code.
- This is the phone number that will print on referral sheets given to participants.

3.6 "**Breastfeeding Referral:**"

- Check this box if WIC participants are referred to this organization for breastfeeding support.
- The checked box will link with "**Client Processes**" and display as a breastfeeding referral option.
- Those referrals with this box checked are the only ones that will show in the "**Breastfeeding Tracking**" screens.

3.7 "**Org Description**" is used to add any additional details you would like available to the participant, such as hours of operation.

- This information will print on the written referral given to participants.

3.8 "**Email Address**" is the organization address that could be used by participants to contact the organization.

- This information will print on the written referral given to participants.

3.9 "**Web Site**" is the internet site for the organization.

- This information will print on the written referral given to participants.

3.10 "**End Date**" is entered when the referral organization is no longer available.

- Referral organizations cannot be deleted once they have been assigned to a participant record.

- Saving an "**End Date**" will remove the organization from the "**Referral Organization**" selection drop down on the "**Intake**" screen or "**NE Referrals**" screen.
- To reactivate the referral organization, delete the "**End Date**".

4. **Save.**

- "**Referral Org ID**" was generated and the "**Contacts**" and "**Communications**" tabs are now activated.
- The "**Clinic**" button found in the lower right hand corner of the screen is now highlighted and available for you to enter information.

5. **Click on the "Clinic" button.**

This pop-up will associate specific WIC clinics with the referral organization.

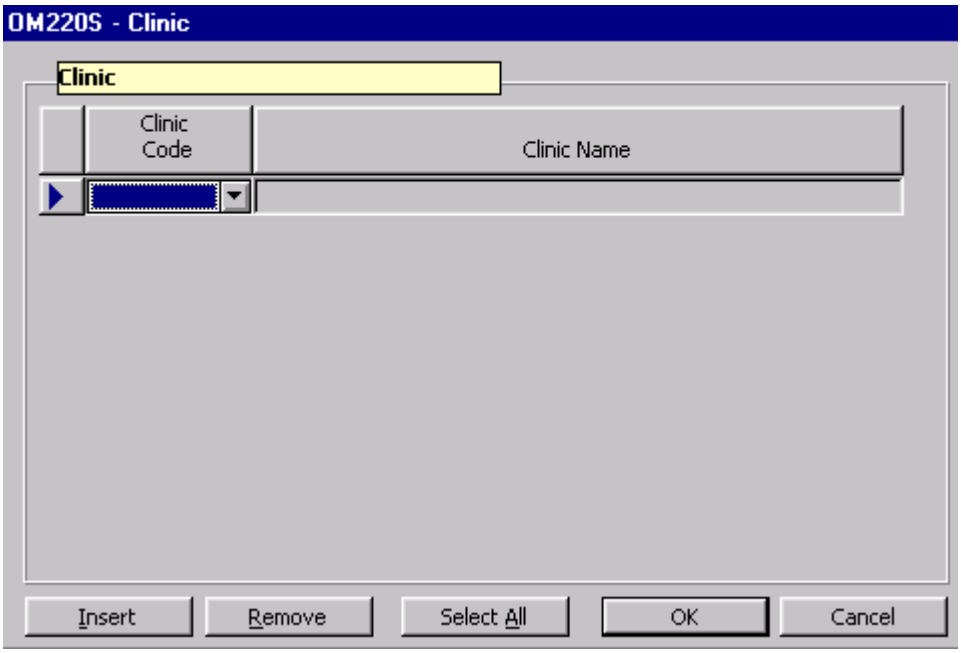


Figure 2: "Clinic" Pop-Up

6. **Click on the "Clinic Code" from the drop down list.**

- This will automatically populate the "**Clinic Name**" field with the name of the clinic selected.
- You have the choice to use the "**Insert**" button to create another row and add another clinic or use the "**Remove**" button to delete a clinic.

- To change a clinic, move the indicator arrow to the clinic line you want to change and select a different clinic.
- This function will allow the system to provide the correct referral organization information for participants attending a certain clinic.
- Select all clinics you want associated with this referral organization.

7. **Click on "OK." This will save the information you entered and return you to the "Referral/Outreach Info." tab.**

Completing the "Contacts" Screen

The starting point for this section is:
Operations Management ⇨ Operations ⇨ Referral Organizations ⇨ Organizations

8. **Click on the "Contacts" tab.**

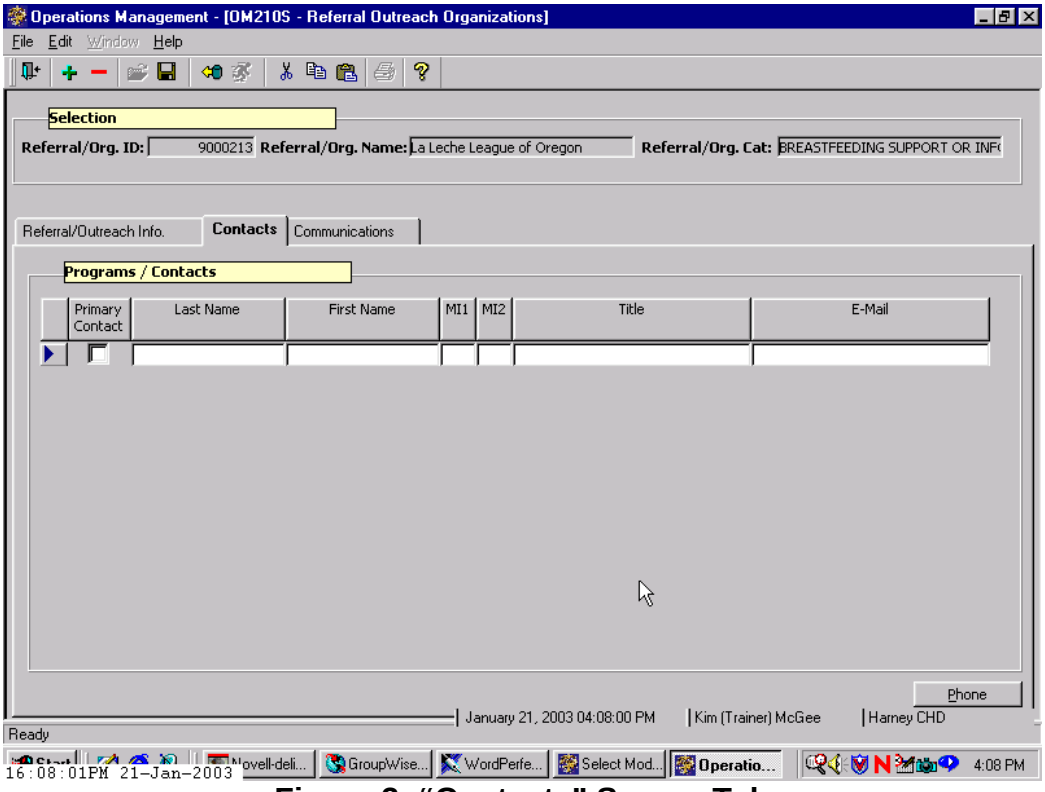


Figure 3: "Contacts" Screen Tab

You will enter information regarding specific individuals associated with the organization on this screen. These contacts are for your agency staff, not WIC participants.

9. **Complete the contact information for individuals associated with this organization.**

- One individual may be designated as the primary contact for this organization by checking the "**Primary Contact**" box.
- Names and addresses are case sensitive.

Example: Jane Doe vs. jane doe

- To add another contact name, click "**Insert**" or tab to create a blank line.

10. **Save.**

The "**Phone**" button located in the lower right hand corner has been activated.

11. **Click on the "Phone" button.**

- This pop-up is where you enter the phone number(s) for the individual with the indicator arrow to the left of their name.
- Enter the number, extension and type of phone.
- Use the "**Insert**" and "**Remove**" buttons to add and delete phone numbers within the pop-up.
- Clicking "**OK**" will save the information and close the pop-up.
- The "**Cancel**" button will close the pop-up without saving the information.
- Open the "**Phone**" pop-up each time you enter a different individual's number.

12. **Click "OK."**

This will return you to the "**Contacts**" screen. The "**Communications**" tab is also activated. This tab is display only and keeps a list of communication with this organization.

13. **Exit the "Referral/Outreach Organization" screen.**

Documenting Referral Outreach Communications

The starting point for this section is:
Operations Management ⇨ Operations ⇨ Referral Organizations ⇨ Communications

1. **Select "Communications" from the drop down menu.**

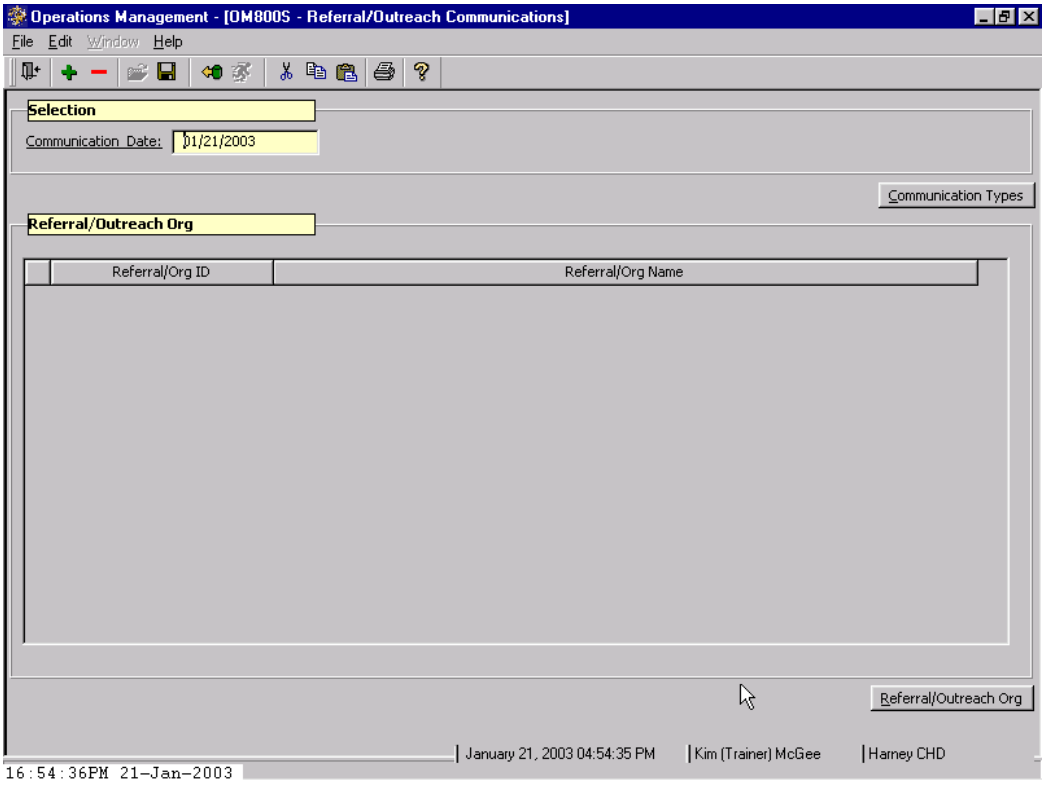


Figure 4: "Referral/Outreach Communications" Screen

- The "**Referral/Outreach Communications**" screen is used to record and track correspondence and other outreach activities by documenting the type of communication you send to the referral/outreach organization.
- This information is then linked to the "**Communications**" tab in the "Referral/Outreach Organization" screen and may be viewed from that area.

♫ NOTE: The screen is split into 2 sections: "Selection" and "Referral/Outreach Org". The "Referral/Outreach Org" section needs to be completed first.

2. **Click on the "Referral/Outreach Organization" button.**

   This is located in the lower right hand corner of the screen.

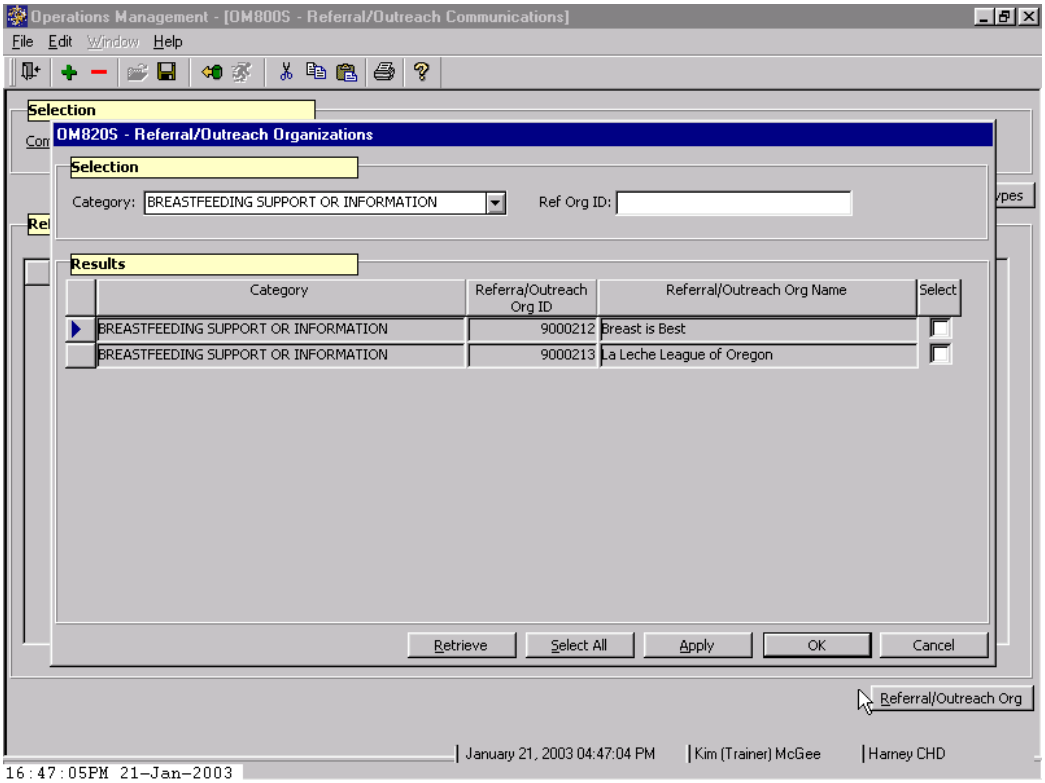


Figure 5: "Referral/Outreach Organizations" Pop-Up

- This pop-up will allow you to search for and select the organization(s) to which you will send a communication.
- The pop-up is split into two sections: the "**Selection**" section on the top and the "Results" section on the bottom.
- You will first conduct a search for the organization using either "**Category**" or "**Referral Org ID**" in the "**Selection**" section.

3. **Click on the drop down arrow for the "Category" field.**

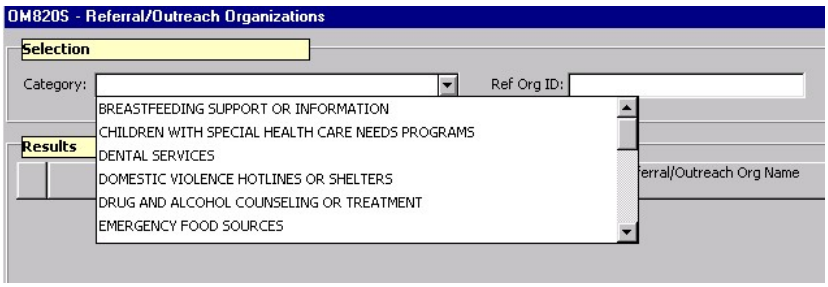


Figure 6: "Category" Field

Select the category of the organization to receive this communication from the drop down list.

4. **Click on the "Retrieve" button.**

   - The "**Results**" section is now populated with a list of all the organizations in the system that fall into the category you have selected.
   - Clicking the "**Select All**" button selects all of the organizations listed here to receive this communication.
   - To select one or more specific organizations within this category, click in the "**Select**" box next to the desired organization.
   - Click on the "**Apply**" button to mark these organizations to receive the communication.

5. **Click on an organization and click "OK."**

   This will return you to the "**Referral Outreach Communications**" screen. The "**Referral/Outreach Organizations**" section is now populated with your selected organization.

6. **Click in the "Communication Date" field.**

   Enter the date the communication is sent.

7. **Click on the "Communications Type" button.**

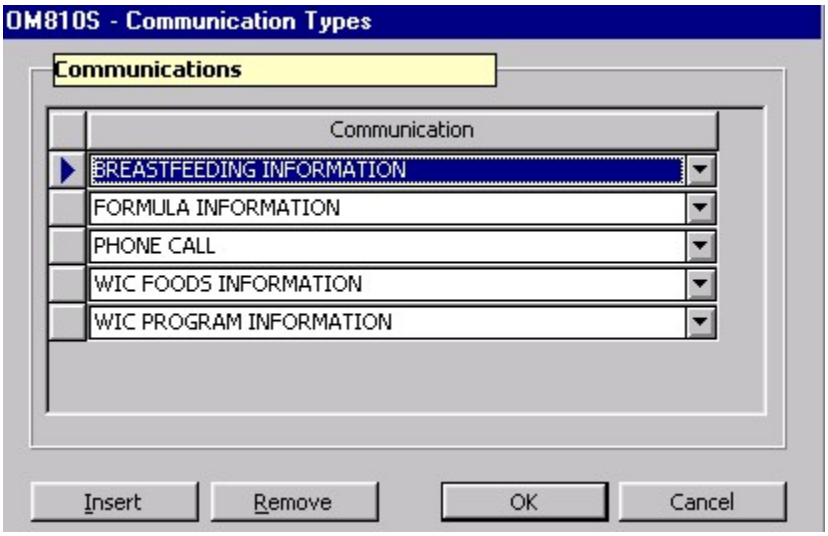


Figure 7: "Communications Type" Pop-Up

   - This pop-up allows you to select from the drop down list, the type of communication(s) you will/have sent, such as phone call, newsletter, etc.
   - Click on the "**Insert**" button to add another type of communication for the organization(s) if more than one is desired.

- Click on the "**Remove**" button to delete the selected communication type. A message will appear "*Are you sure you wish to remove this row?*" Select the "**Yes**" or "**No**" button below the message to delete the communication type or to cancel your request.
- You may select multiple communications.

8. **Click on a "Communication Type" and click "OK."**

   This saves all the information you entered and brings you back to the "**Referral Outreach Communications**" screen.

9. **Save.**

10. **Exit to the "Operations Management" window.**

Conducting a Referral Organization Search

The starting point for this section is:

Operations Management ⇨ Operations ⇨ Referral Organizations ⇨ Organizations

This function allows you to look up an existing organization and view any recorded communications.

1. **Click on the "Open" icon to search for an organization.**

   - This will open the "**Referral/Org. Selection**" pop-up.
   - You can search by using one or more of the following fields: "**Referral/Org. ID**," "**Referral/Org. Name**," and/or "**Referral/Org. Category**."

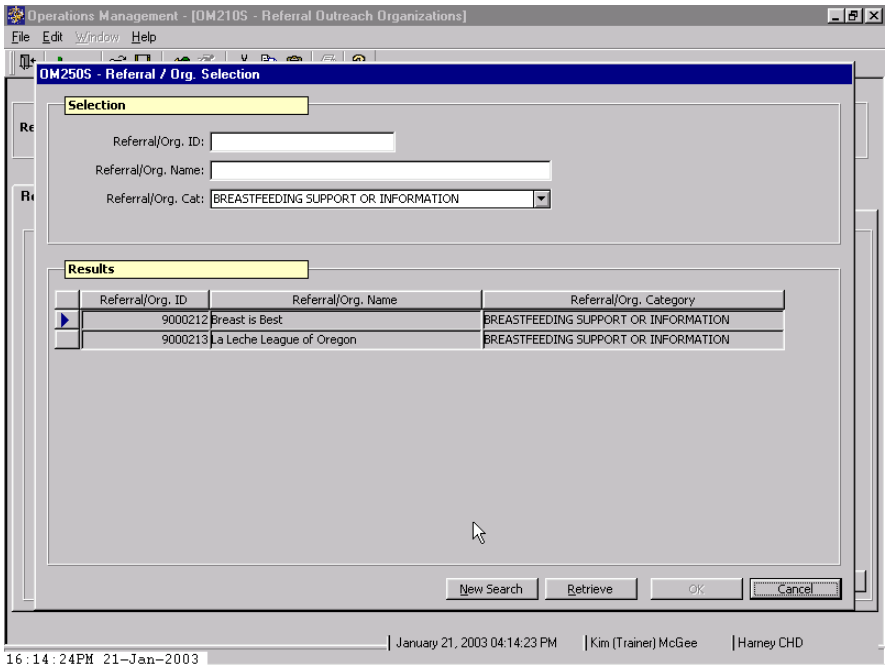


Figure 8: "Referral/Organization Selection" Pop-Up

2. **Enter the name of an organization.**

   If you do not know the full name, you can enter partial spelling or part of the name, however the more information you enter, the better your results will be.

Example: If an organization's name is "Roseburg Family Planning Center", you can enter "R" into the name field to bring up all organizations starting with the letter "R." To narrow your search, enter in the first word "Roseburg" to bring up all organizations beginning with "Roseburg". Entering the entire name of the organization will narrow your search even more.

3. **Click on the "Retrieve" button at the bottom of the pop-up.**

   - This populates the "**Results**" section.
   - If a retrieval populates more than one page of results, you will use the scroll bar to move through the names.

4. **Highlight an organization's name and click "OK."**

   - The "**Referral/ Organization Selection**" pop-up is closed and you are now back at the "**Referral/Outreach Organizations**" screen. Notice the "**Selection**" section is populated with your organization and the tabs now contain your organization's information.

5. **Click on the "Communications" tab.**

   This display-only tab shows any previously documented outreach activity/communication.

6. **Exit the "Referral Outreach Organizations" screen.**

✂ *Tips and Shortcuts:*

- To modify an organization's information: Move your cursor to the appropriate field(s). Make the change or use the "Remove" icon to delete information. Remember to "Save" your modifications. To clear an organization's information, click on the "Insert" icon. This will clear the information and the tabs will then be ready to accept information for a new organization or can be populated by another search.
- Putting in an "End Date" will remove the referral organization from the selection drop down and prevent staff from referring participants to an organization that is no longer available. To reactivate the organization, delete the "End Date" and it will become available on the drop down again.
- "Contacts" tab: Another way to complete this tab is to enter in one individual at a time and then save after entering their information. Saving will activate the "Phone" button so you can enter their phone number(s). Repeat this process for the remaining individuals.
- "Apply" button: This is a 2-step process that requires clicking "Apply" and then "OK". An even quicker way to save the organizations selected, is to simply click "OK" and this will not only save the organizations selected, but will also return you to the previous screen.
- In the "Results" section of the "Referral/Org. Selection" pop-up, by double clicking on the name, this will also select the organization and close the pop-up.

↪ *Practice Activities:*

The starting point for this activity is:

Operations Management ⇨ Operations ⇨ Referral Organizations ⇨ Organizations

Use the Referral Organization DED for this activity.

1. Click "Insert" icon and enter all information for a referral organization into the "Referral/Outreach Info." tab.
2. Save.
3. Click "Clinic" button.
4. Select clinic(s).

5. Click “OK.”
6. Click on “Contacts” tab.
7. Enter information for the primary contact for this organization.
8. Save.
9. Click on “Phone” button and enter the phone number(s).
10. Click “OK.”
11. Exit the “Referral/Outreach Organizations” screen.
12. Exit the “Operations Management” window.

✓*Skill Check:*

Enter an organization into the database for your agency. Have the instructor look up the organization from another computer.

✍*Notes:*

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Chapter 8: Operations Management
Section 1: Operations Management
Lesson 103: Complaints

Objectives:

Upon completion of this lesson the user will be able to:

- Enter a complaint into TWIST;
- Refer a complaint to the appropriate person;
- Retrieve a complaint referral;
- Enter actions taken on the complaint; and
- Print a complaint report for your agency

Oregon Policies:

- ⊄ 588 Complaints
- ⊄ 590 Participant Violations
- ⊄ 452 Civil Rights

Overview:

In order to maintain high standards of integrity for the state WIC program, all of our staff, participants, and vendors are held responsible for following Program rules, policies, and procedures.

USDA required that the WIC Program provide an avenue for participants, vendors and others to complain about perceived inappropriate actions or treatment they have received.

Tracking complaints in TWIST will ensure that individual complaints are appropriately resolved, and allow us to see if a statewide issue needs our attention.

Users will document all complaints, against clients, farmers, stores and the WIC Program on this screen.

Details, details, details! When entering complaints, it is helpful to remember the five "W"s: **W**ho is complaining, **W**ho was involved, **W**hen did it happen, **W**hat are the issues, and **W**hom do I forward the complaint to for resolution.

The more detailed the information is, the quicker the complaint can be resolved.

Instruction:

Entering a Complaint

The starting point for this section is:

Operations Management ÷ Compliance ÷ Complaints

"Complaint" Section:

An "ID" number is automatically generated when all of the required fields have been completed and the screen has been saved.

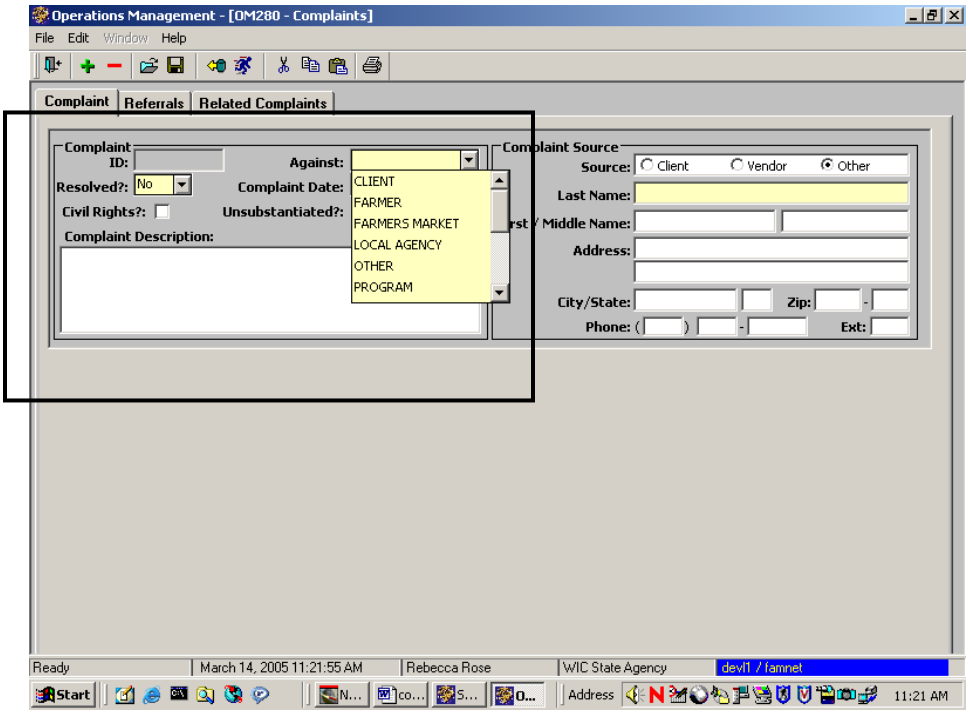

Figure 1: "Complaint Screen"

1. **In the "Against" field, select whom the complaint is against from the drop-down menu.**

   The screen will vary slightly, depending on which selection is made:

   - Client – the complaint is being made against a WIC client.
   - Farmer – the complaint is against a farmer.

- Farmers' Market – the complaint is against the market.
- Local Agency – the complaint is against the agency in general, not a specific employee of the agency.
- Other – the complaint is against someone or something not already categorized, such as USDA, a landlord withholding WIC FIs, etc.
- Program – the complaint is against the WIC Program in general, not a specific employee or local agency.
- Vendor – the complaint is against an employee of an authorized WIC store.

2. **Click on the drop-down menu in the "Resolved" field.**

   This field defaults to "No." State WIC staff will change this field after appropriate follow-up has been completed.

3. **Enter the date the alleged violation occurred in the "Complaint Date" field.**

   This is the date of the actual event, not the date that staff entered the complaint into TWIST.

4. **Check the "Civil Rights" box when appropriate.**

   Check this box if the complaint involves discrimination against any individual based on that individual's race, color, national origin, age or disability.

♫ Note: Contact the state WIC civil rights coordinator immediately after entering the civil rights complaint into TWIST. Refer to PPM 588 for more information.

5. **The "unsubstantiated" box will be checked, after investigation, if the allegation has been determined to be false, cannot be verified or the complaint is withdrawn.**

6. **Double click in the "Complaint Description" field; enter a detailed description of the complaint in the pop-up text box.**

   Remember that details are important for resolving complaints.

"Against" field screen changes:

As mentioned in Step 2., the screen changes slightly depending on whom the complaint is against.

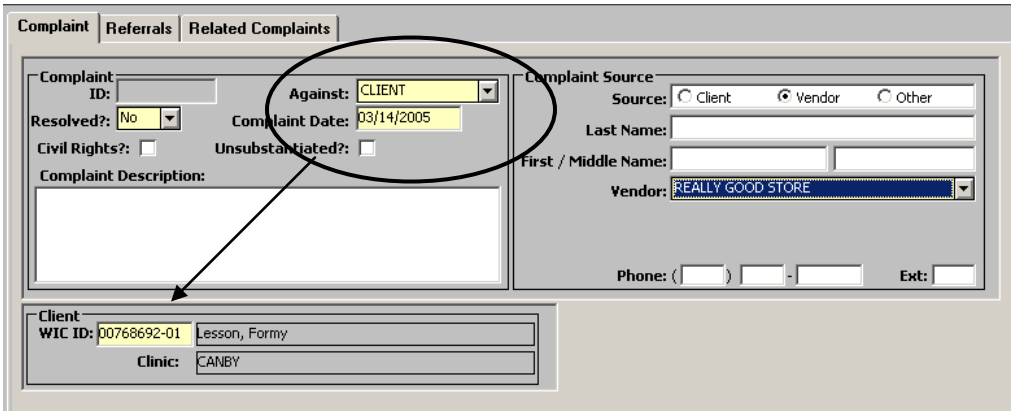

Figure 2: Complaint Screen: Against Client

If the complaint is against a client, a section will appear that requires a WIC client ID number.

7. **Enter the client WIC ID number and press enter.**

   TWIST will display the client name and clinic.

♫ NOTE: If you do not know the WIC ID, Fast Path to client master, find the client and click on the "Return with Client" button. TWIST will auto-fill the ID field.

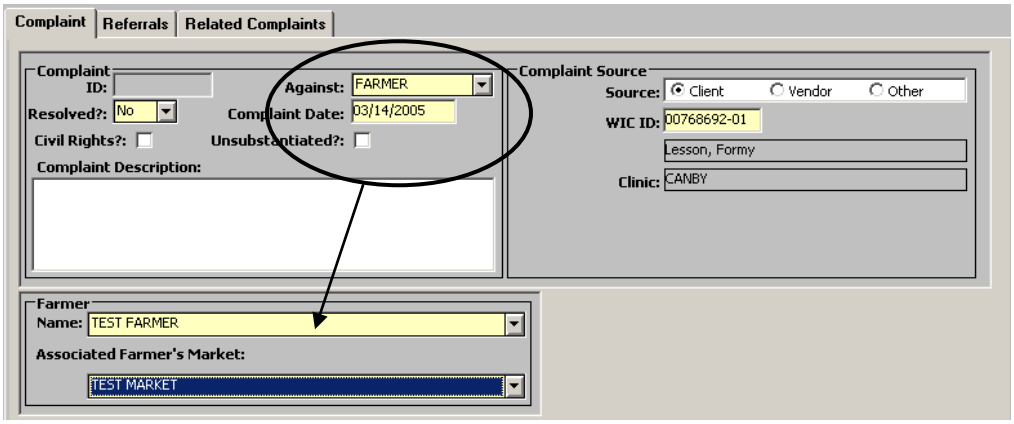

Figure 3: Complaint Screen: Against Farmer

If the complaint is against a farmer, a section will appear that requires the user to select the name of a farmer from the drop-down menu.

8. **Select the name of the farmer from the drop-down menu.**

9. **Select the name of the farmers' market where the alleged violation took place.**

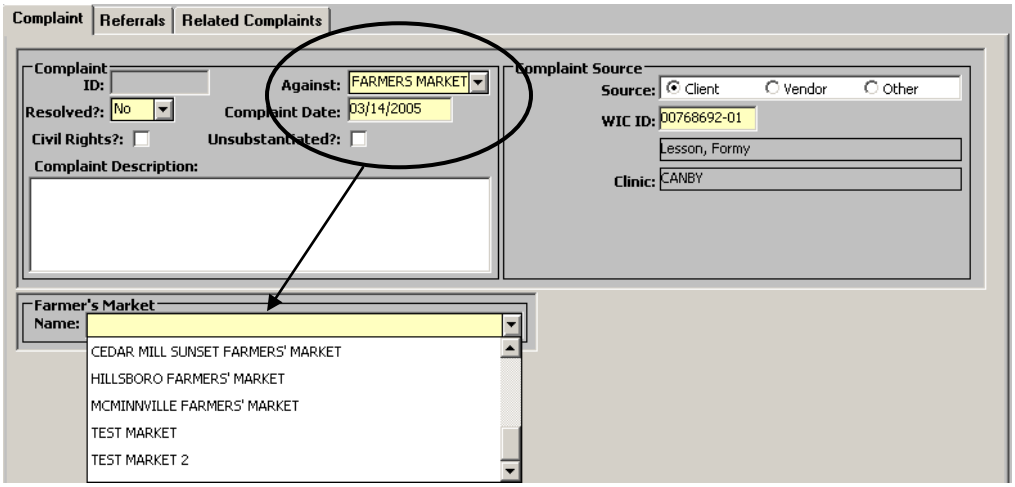

Figure 4: Complaint Screen: Against Farmers' Market

If the complaint is against a Farmers' Market, a section will appear that requires the user to select the name of the Market from the drop-down menu.

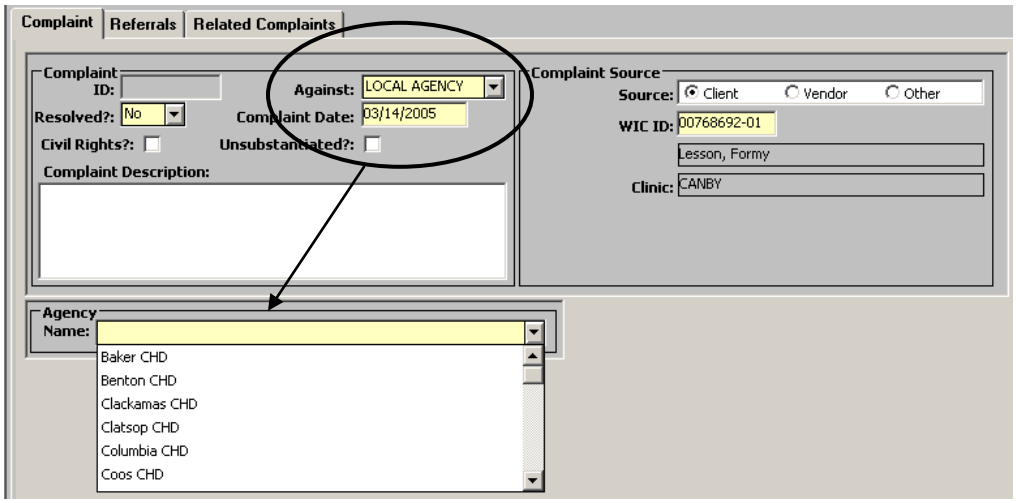

Figure 5: Complaint Screen: Against Local Agency

If the complaint is against a Local Agency, a section will appear that requires the user to select the name of the Local Agency from the drop-down menu.

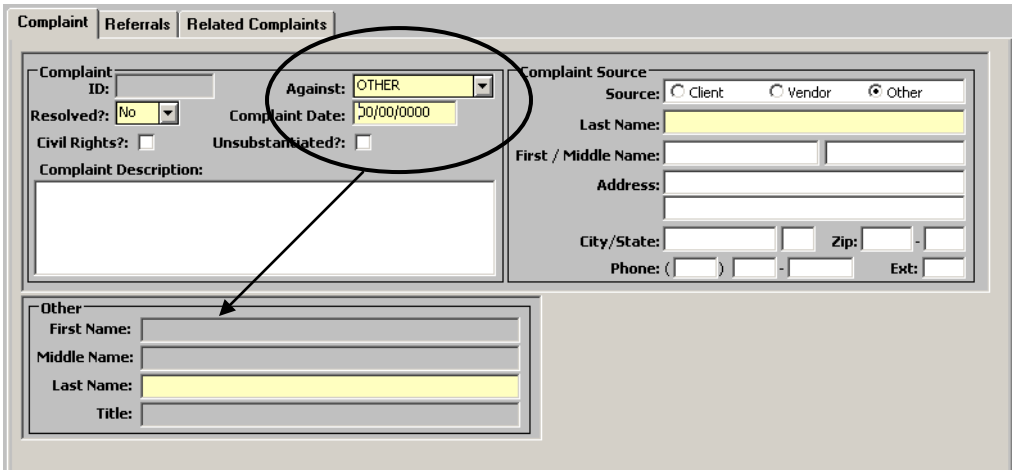

Figure 6: Complaint Screen: Against "Other"

If the complaint is against a person or entity not listed in drop-down menu, such as, a store that is not authorized or a person that is not a client at this time, the user would select "Other" from the menu.

No additional sections will appear when the user selects "Program" from the "Against" drop-down menu.

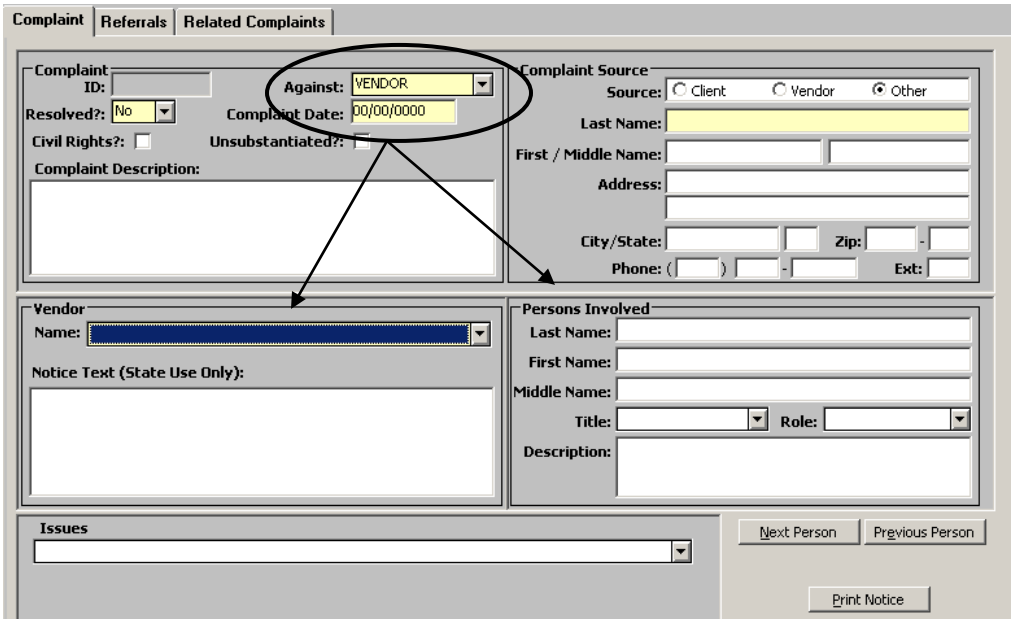

Figure 7: Complaint Screen: Against "Vendor"

If the complaint is against a vendor, two new sections will appear:

"Vendor" Section:

10. **In the "Name" drop-down menu, select the store where the complaint event took place.**

    All Oregon authorized WIC vendors are listed in this menu. If the name of the store is not in the list, change the "Against" selection to "Other" and continue to enter the details of the incident.

The "Notice Text" field is for state use only.

"Persons Involved" Section:

11. **Enter in the name of the person at the store that committed the alleged violation.**

    This could be a checker, store manager, pharmacist, etc. If the person making the complaint does not know or remember the name, use "Unknown."

12. **Click in the "Description" box.**

    If the name of the "Person Involved" is unavailable, enter a description of the person, time of day, receipt number, or any other helpful information.

13. **From the "Title" drop-down menu, select the person's job description.**

14. **Use the "Insert" icon to enter additional people involved in the incident.**

15. **Click on the "Previous Person" and "Next Person" buttons.**

    You will see the information on the last person that you entered.

16. **Click on the "Next Person" button.**

    You will see the information on the most recent person entered.

"Complaint Source" Section:

This section is for documenting the type of person making the complaint. Complaint source information is kept confidential unless authorized for release by the person making the complaint.

There are three choices: vendor, client and other. The fields will change according to which source you choose.

17. **Click in the "Client" circle.**

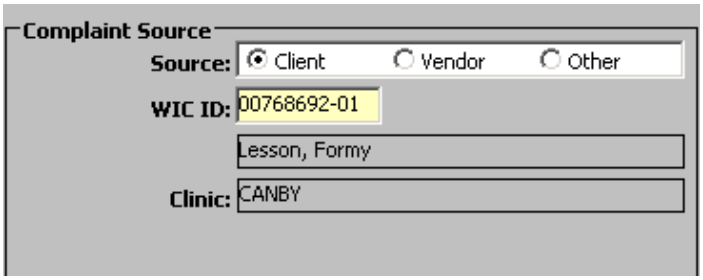

Figure 8: "Complaint Source: Client"

18. **Enter the client WIC ID number and press enter.**

TWIST will auto-fill the client name and clinic.

♫ NOTE: If you do not know the WIC ID, Fast Path to client master, find the client and click on the "Return with Client" button. TWIST will auto-fill the field.

19. **Click in the Vendor circle.**

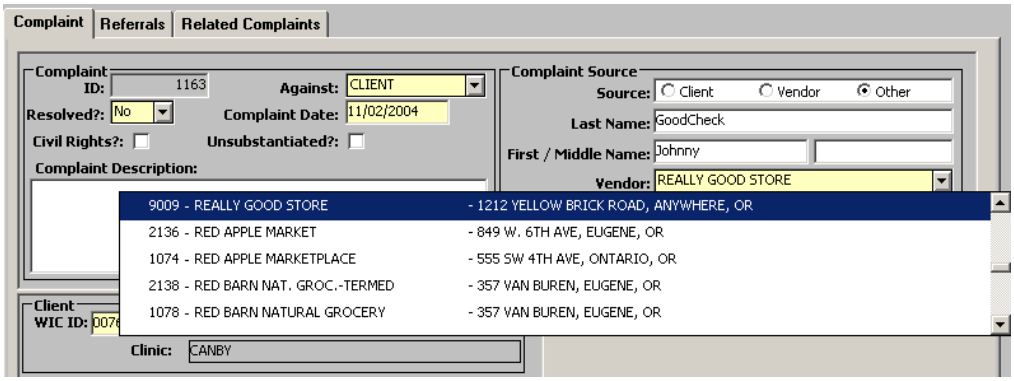

Figure 9: "Complaint Source: Vendor"

20. **Enter the name of the store employee who is reporting the complaint.**

    Information about the complaint source is kept confidential unless they authorize release of the information. If, after explaining that, they do not want to disclose their name, enter "Anonymous" in the "Last Name" field.

21. **Select the name of the store they work for from the "Vendor" drop-down menu.**

22. **Enter a phone number where the employee can be reached for more information.**

    If the person does not want the state staff to contact them, or if they have certain requirements for contact, enter notes in the "Complaint Description" field.

"Issues" Section:

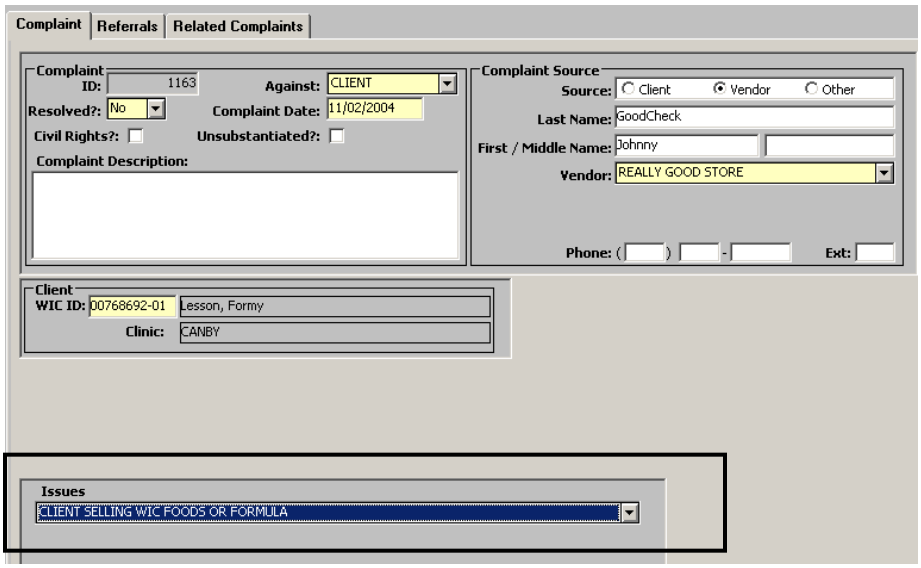

Figure 10: Complaint Screen: "Issues" Section

23. **Tab to the "Issues" drop-down menu and select the issue that closely most closely matches the complaint.**

    You can select more than one issue by clicking on the "Insert" icon at the top of your screen.

If you need to explain specific details, use the "Complaint Description" box.

24. **"Save."**

TWIST will generate and display a complaint ID number upon "Save."

Referrals Tab

The starting point for this section is:
Operations Management ÷ Compliance ÷ Complaints ÷ Referrals Tab

"Referrals" Section:

Once the complaint information has been entered and saved, the complaint should be referred to an appropriate person for follow-up. This step is preferred, however, if the local clinic staff are pressed for time, it is an optional step. The state WIC Compliance Coordinator will run a report of all non-referred complaints on a regular basis and refer to the appropriate person for follow-up.

The WCC may refer back to the local agency Coordinator if additional information or action is needed.

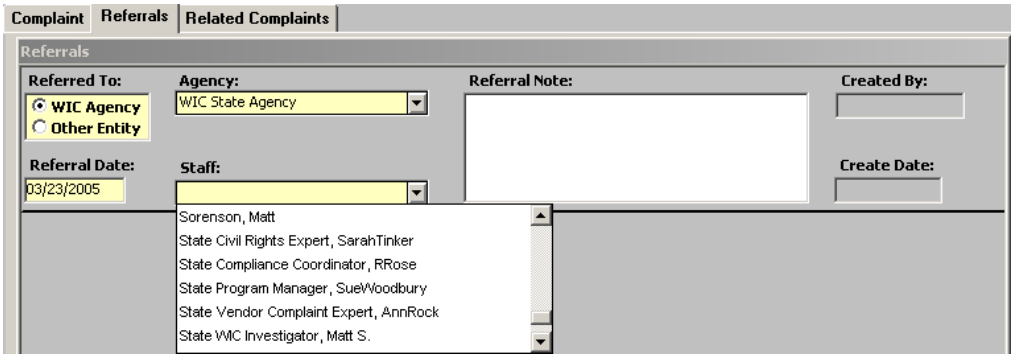

Figure 11: "Referrals" Screen

1. **Click in the "WIC Agency" circle of the "Referred To:" section.**

Two drop-down menus will be displayed.

The "Other Entity" circle is selected when referring the complaint to an outside program, such as USDA or the Department of Agriculture.

2. **In the "Agency" drop-down, select "WIC State Agency."**

   State staff will forward complaints to the appropriate local agency if necessary for follow-up.

3. **In the "Staff" drop-down, select the appropriate state staff.**

   If you do not know whom to select, refer the complaint to the state WIC Compliance Coordinator (WCC.) Once processed, the complaint will be forwarded to the appropriate person.

4. **Click on the "Referral Date" field.**

   TWIST will default to today's date. Users can change the date if necessary.

5. **Double click in the "Referral Notes" box and enter any information you want to pass on with the referral.**

6. **"Save."**

"Action Taken" Section:

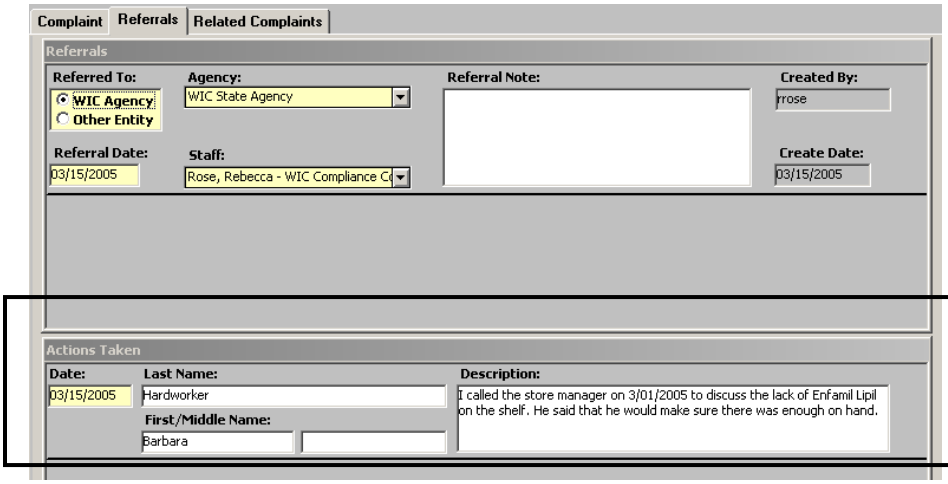

Figure 12: "Referrals"

This area is for documenting each action that was taken on this complaint.

7. **Enter the date the action took place.**

   TWIST will default to today's date.

8. **Enter your name, if you are the person that took action on the complaint.**

   If you are entering the information for someone else, put their name in the field.

9. **Double click in the "Description" box to enter a summary of the action.**

   This could be a conversation with the store manager or client, decision of the local agency.

10. **Click on the "Insert" icon to add a new row for additional actions.**

11. **"Save"**

Related Complaints Tab

The starting point for this section is:

Operations Management ÷ Compliance ÷ Complaints ÷ Related Complaints Tab

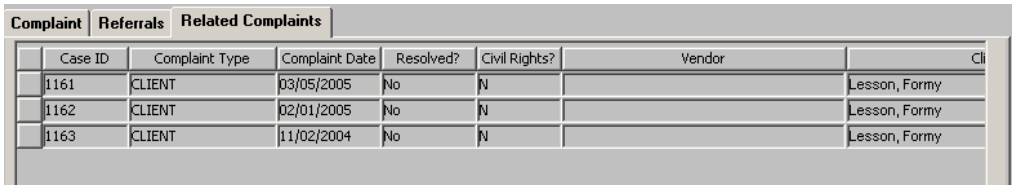

Figure 13: Related Complaints Screen

This screen is "display only." The screen will list the current complaint and any other complaints that have been made against this client, vendor, farmer, etc.

(Practice Activities:

Using the information from your K Activity Sheet, follow the steps below to enter a complaint into TWIST.

1. Click on the "Operations Management" module.
2. From the Compliance menu, select "Complaints."

3. Enter a new complaint by selecting “Vendor” in the “Against” drop-down menu.
4. Enter today’s date as the “Complaint Date.”
5. Enter a description of the incident in the “Complaint Description.”
6. Select “Client” as the “Complaint Source.”
7. Enter a WIC client ID number and press “enter.”
8. Click on the “Vendor” drop-down menu and select the store where the incident took place.
9. From the “Person involved” section, enter the name of the person who committed the alleged violation.
10. Select a title and role from the drop-down menus.
11. Click on the “insert” icon and enter a second person.
12. “Save.”
13. Look for the “Complaint ID” number that TWIST generated.
14. Click on the “Referrals” tab.
15. Select “WIC State Agency.”
16. Select the “WIC Compliance Coordinator’s” name from the “Staff” drop-down menu.
17. Enter a referral note.
18. Tab to “Action Taken: Date” field and enter today’s date.
19. Enter your name in the “Last Name” and First Name” fields.
20. In the “Description” field, type a summary of the conversation with the client regarding the incident.
21. “Save.”

*N*Notes:

Chapter 8: Operations Management
Section 1: Operations Management
Lesson: Breast Pump Inventory and Reports

Objectives:

Upon completion of this lesson the user will be able to:

- view and add breast pumps to the "**Breast Pump Inventory**" table;
- change the status of a Lactina pump; and
- view and print the "**Lactina Tracking**" report.

Oregon Policies:

♦ 712 Breastfeeding: Breast Pump Distribution and Recovery Guidelines

Overview:

The "Breast Pump Inventory" table and "Lactina Tracking" report are used in conjunction with the "Breast Pump Issuance" screen to issue, track and maintain breast pump inventories. Information in the inventory table and report is automatically updated when breast pump information is entered in the "Breast Pump Issuance" screen. For more information see Chapter 3, Lesson 600 *Breastfeeding Tracking*.

Instruction:

Completing the Breast Pump Inventory Table

The starting point for this lesson is:

Operations Management ⇨ Tables ⇨ Breast Pump Inventory Table

Adding a Hospital Grade Pump (Lactina) to the Inventory

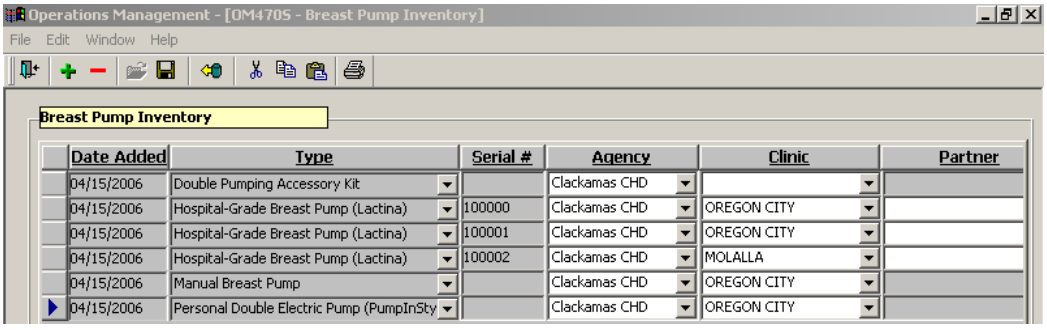

Figure 1: Breast Pump Inventory Table

1. **Click the "Insert" icon to add a row.**

2. **The "Date Added" field defaults to today's date but can be modified.**

3. **In the "Type" field, select "Hospital-Grade Breast Pump (Lactina)" from the drop down list.**

4. **Complete the "Serial #" field by typing in the 6-digit serial number stamped on the Lactina.**

5. **Complete the "Agency" field by selecting your agency from the drop down list.**

6. **Complete the "Clinic" field by selecting the clinic from the drop down list. This field is optional.**

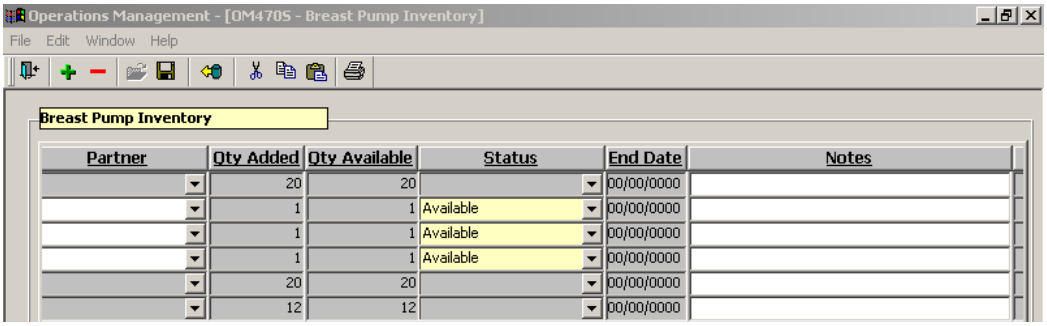

Figure 2: Breast Pump Inventory Table

7. **Complete the "Partner" field by selecting the partner from the drop down list. If the "Agency" field is left blank, the "Partner" field becomes mandatory.**

♫ Note: *Statewide* pump partners and their assigned Lactina pumps are added to TWIST by the state WIC office and will automatically appear in your inventory. To add *Local* pump partners, contact the state WIC office.

8. **The "Qty Added" field for a Lactina pump is always 1. Type a quantity of "1" in this field.**

9. **Complete the "Status" field by selecting *Available* from the drop down list.**

10. **When *Available* is selected in the "Status" field and "Save" is preformed, the "Qty Available" field will be populated with "1".**

11. **Double click in the "Notes" field to open the "Breast Pump Issuance Notes" field and enter a free form note.**

♫ NOTE: User can sort this table by **Agency**, **Clinic** or **Partner** by clicking on the appropriate column heading.

Adding Other Breast Pumps to the Inventory

1. **Click the "Insert" icon to add a row.**

2. **The "Date Issued" field defaults to today's date but can be modified.**

3. **Complete the "Type" field by selecting the appropriate pump type from the drop down list.**

4. **Complete the "Agency" field by selecting your agency from the drop down list.**

5. **Complete the "Clinic" field by selecting the clinic from the drop down list. This field is optional.**

6. **Complete the "Qty Added" field by typing in the quantity of pumps.**

Changing Lactina Pump Status

1. **Change the information in the "Status" field by selecting a new status from the drop down list.**

♫ Note: There are 7 pump status types in TWIST. Three status types change automatically when information is entered in the "Breast Pump Issuance" screen. For example, when a Lactina is issued the status changes from *Available* to *Issued* and when a return date is entered the status changes back to *Available.* The status of a Lactina changes to *Under Investigation* when the "Referred to State" field is completed. The other four status types must be manually selected in the "Breast Pump Inventory" table. These status types are In-House Cleaning (optional), Permanently Out of Service, Returned to Manufacturer and Unrecoverable.

Viewing the Lactina Tracking Report

The starting point for this lesson is:

Client Process ⇨ Outputs ⇨ Reports ⇨ Nutrition Education ⇨ Breastfeeding ⇨ Lactina Tracking Report

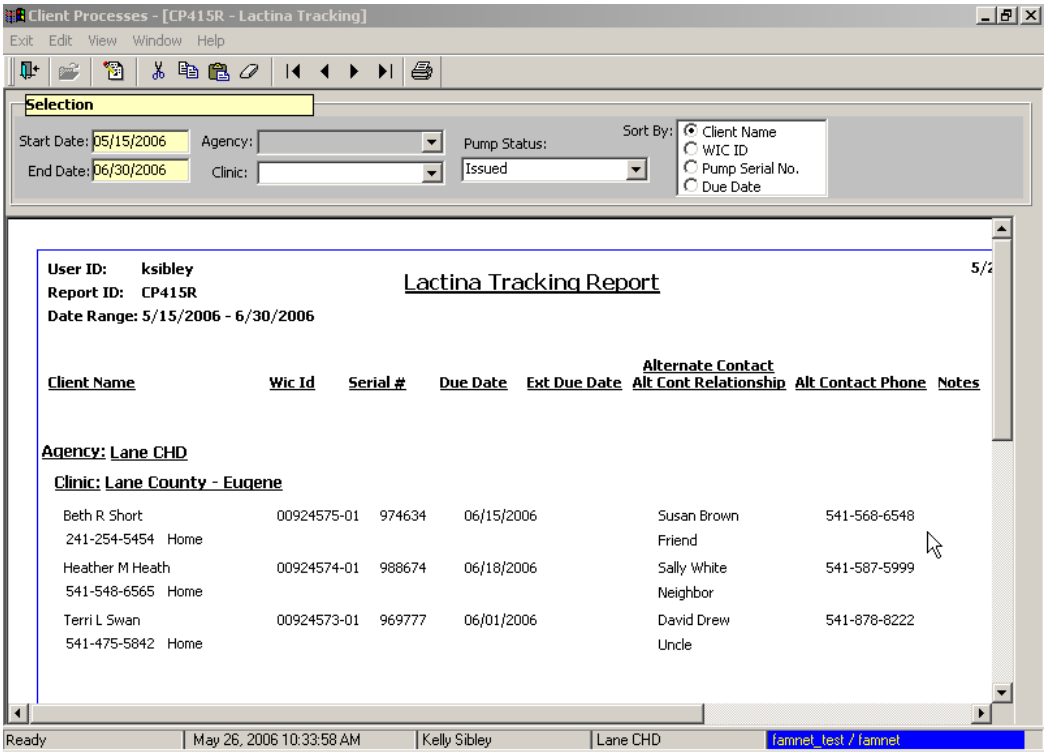

Figure 3: Lactina Tracking Report

1. **Enter a range of Lactina return due dates in the "Start Date" and "End Date" fields.**

2. **Select a clinic from the drop down list in the "Clinic" field or leave this field blank to run a report for all clinics.**

3. **Select a pump status type in the drop down list in the "Pump Status" field or leave this field blank to run the report for all status types.**

4. **Select a sort preference in the "Sort By" field.**

5. **Click on the "Run" icon to view the report.**

6. **Click on the "Print' icon to print the report.**

Notes:

Chapter 8: Operations Management
Section 1: Operations Management
Lesson 105: Forms and Materials Ordering

Objectives:

Upon completion of this lesson the user will be able to:
- Use TWIST to order forms and materials from the state office; and
- Retrieve forms and material orders.

Oregon Policies:

∝ 425 Ordering State Produced Materials

Overview:

Local agencies use many forms and nutrition education materials that are provided by the state program. These may be ordered by contacting the state mailroom directly, but may also be ordered using TWIST to tell the state what is needed. Using TWIST has the advantage of providing a way to track what you ordered. Since TWIST material orders are processed by a state WIC staff person, it also improves coordination of material ordering and communication. It is hoped that this will improve efficiency in the forms and materials ordering process overall.

Instruction:

Ordering State Produced Forms or Materials with TWIST

The starting point for this section is:
Operations Management ÷ Operations

1. **Select "Forms and Materials – Forms Ordering" from the "Operations" menu.**

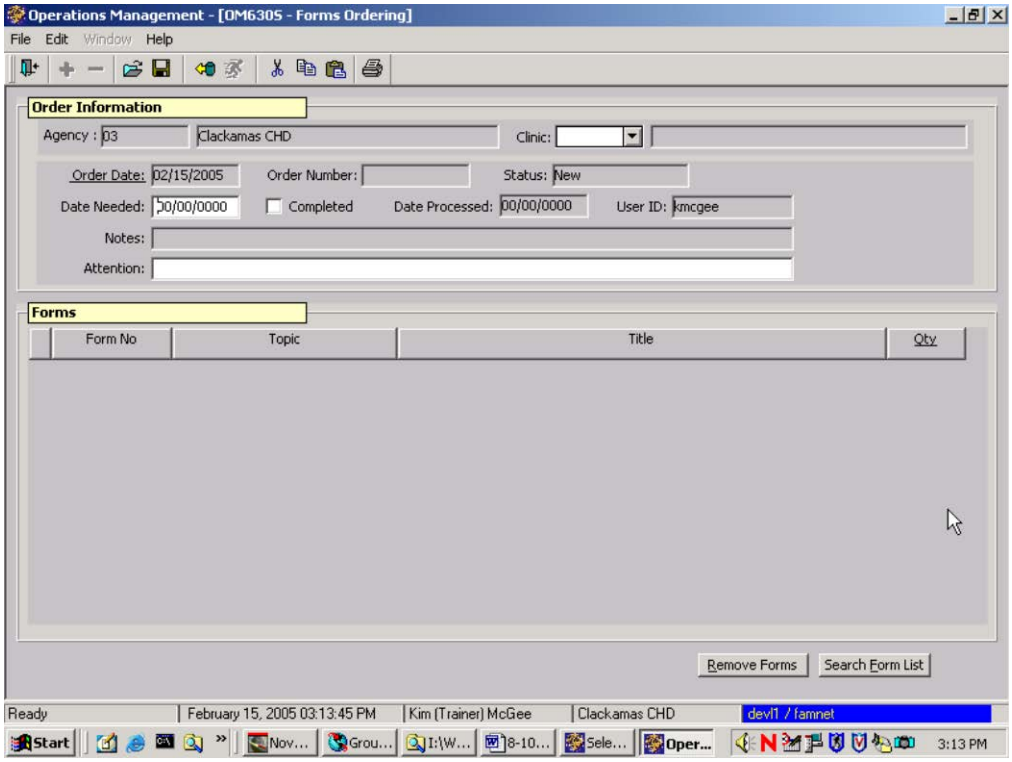

Figure 1: "Forms Ordering" Window

2. Select a "Clinic" if needed.

- Clinic will indicate where you want your completed order mailed.
- Leaving clinic blank will default the return address to the main agency address.

3. Complete the "Date Needed" field.

- "**Order Date**" auto-fills with today's date.
- "**Order Number**" is system generated when you save your order.
- "**Date Processed**" is the date the state office sends the order to the state mailroom to be filled.
- "**User ID**" is auto-filled from your user ID and tells the state program who ordered the materials.

4. Double click on the "Notes" field to add a note.

- Notes are not visible to the state program, so are for your information only.

5. Complete the "Attention" field if you want the order returned to a specific staff person in your agency.

6. Click the "Search Form List" button.

✂ *Tips and Shortcuts:*

- Type your tips here.
- They can be in bullet format.
- Delete this section if you don't have tips.

➥ *Practice Activities:*

Using your K Activity Sheet, follow the steps below to .

1. The action steps.
2. Are numbered.
3. In Times New Roman.
4. Font.

✓*Skill Check:*

Use your K Activity Sheet for this practice.

More Practice:

Additional practice can go here.

NNotes: