

Job Aid

Checklist for staff leaving WIC

This checklist is for WIC coordinators and training supervisors when a staff member is leaving WIC. Your organization may have additional steps.

Note: Do not use this checklist if the staff member is only away temporarily (for example, on family or medical leave). Citrix accounts deactivate after 30 days of no use. If this happens, email WIC App Support to reactivate the account.

#	Exit task	Checkbox
1.	Email WIC App Support (WIC.APP-SUPPORT@odhsoha.oregon.gov) with the employee's name and request deletion of their Citrix and FamilyNet access.	<input type="checkbox"/>
2.	If the employee has WIC Direct, email WIC App Support (WIC.APP-SUPPORT@odhsoha.oregon.gov) and request deletion of their WIC Direct access.	<input type="checkbox"/>
3.	If the employee has Teletask, email WIC App Support (WIC.APP-SUPPORT@odhsoha.oregon.gov) and request inactivation of their Teletask access.	<input type="checkbox"/>
4.	If the employee has Basecamp, email the WIC Training Team (wictraining@oha.oregon.gov) and request removal.	<input type="checkbox"/>
5.	Remove the employees TWIST User ID and roles. <ul style="list-style-type: none">• See TWIST Training Manual, Chapter 6, Lesson 100 for instructions.• See Policy 901 – TWIST Data System Security for more information.	<input type="checkbox"/>

#	Exit task	Checkbox
6.	End-date the employee in TWIST.	<input type="checkbox"/>

How to end-date a staff member in TWIST

1. Open Operations Management.
2. Go to the Operations tab and select Staff Information.
3. Use the blue folder icon to find the staff member's record.
4. Enter the staff member's end-date.

The screenshot shows the 'Operations Management - [QM1405 - Staff Information]' window. The 'Staff Information' tab is active. The 'End Date' field is highlighted with a red arrow, indicating where to enter the staff member's end-date. The current value in the 'End Date' field is '00/00/0000'. Other fields include 'Staff Id: 9000425', 'User Id: kmcgee', 'Staff Type: PERMANENT', 'Agency: Ford', 'Last Name: McGee', 'First Name: Kim', 'WIC Start Date: 01/01/1980', 'Address 1', 'Address 2', 'City', 'State: OR', 'Zip', 'E-Mail Address', 'Risk Level: HIGH', and 'Not available for scheduling' (checkbox). Buttons for 'Clinics', 'Local Agency Roles', 'Languages', 'Credentials', and 'Phones' are located at the bottom of the form.

5. If the staff member was a certifier:
 - a) Click the Clinics button.

- b) Remove all clinics assigned to them. This removes the staff member from scheduling drop-downs and training-related reports.

