

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.**

The screenshot shows a software window titled "Operations Management - (040105 - Agency/Clinic Information)". The window has a menu bar (File, Edit, Agency/Address, Window, Help) and a toolbar. The main area is divided into sections. The "Selection" section at the top has "Agency Code: HR" and "Agency Name: Hood River". Below it are "Clinic Code:" and "Clinic Name:". The "Agency Information" section has tabs for "Info/Inquiries", "WIC Review", "Clinic Hours", and "Days/Hours Closed". Under the "Information" tab, there are fields for "Local Agency Account Number:", "Base Hrs Per Week: .00", "Farmers' Markets:" (a dropdown menu), "LA Postage Billing Code:", "Mail Category: 9" (a dropdown menu), and "FI Stock Threshold:". Below this are two address sections: "Mailing Address" and "Shipping Address". Both have "Address:", "City:", "State: OR", and "Zip:" fields. The "Mailing Address" section is highlighted with a black box. At the bottom of the window are buttons for "Edit All Ranges", "Prints", "Logout", "Save Staff", and "Unhide Contacts". The status bar at the very bottom shows "Ready", "January 18, 2000 03:30:43 PM", "Jeff Waite", and "Hood River".

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.

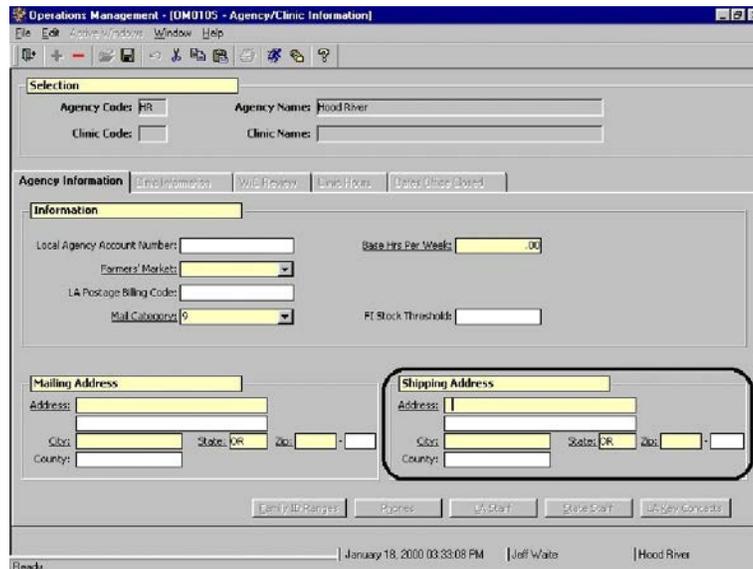


Figure 4: “Physical Address” Section

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.**

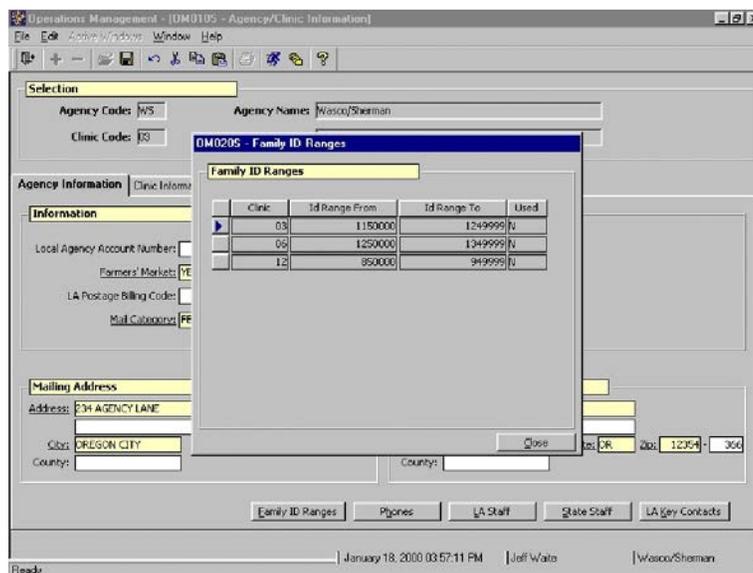


Figure 5: “Family ID Ranges” Pop-Up

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.

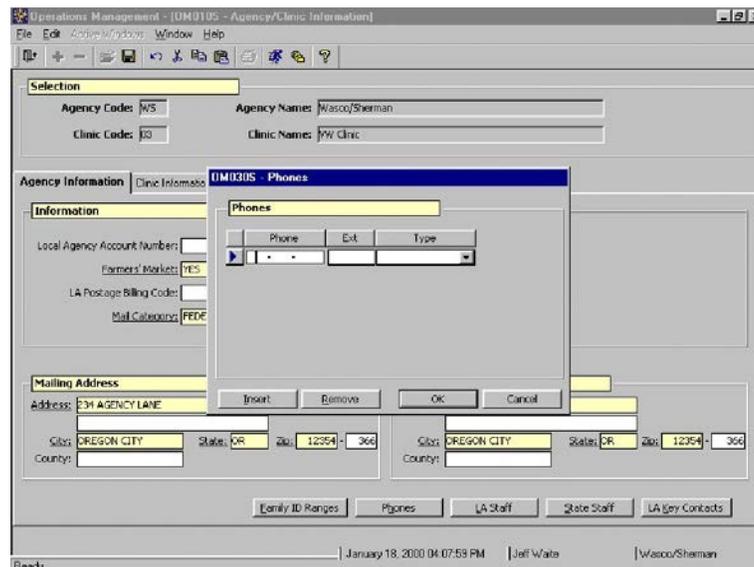


Figure 6: “Phones” Pop-Up

- 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.**

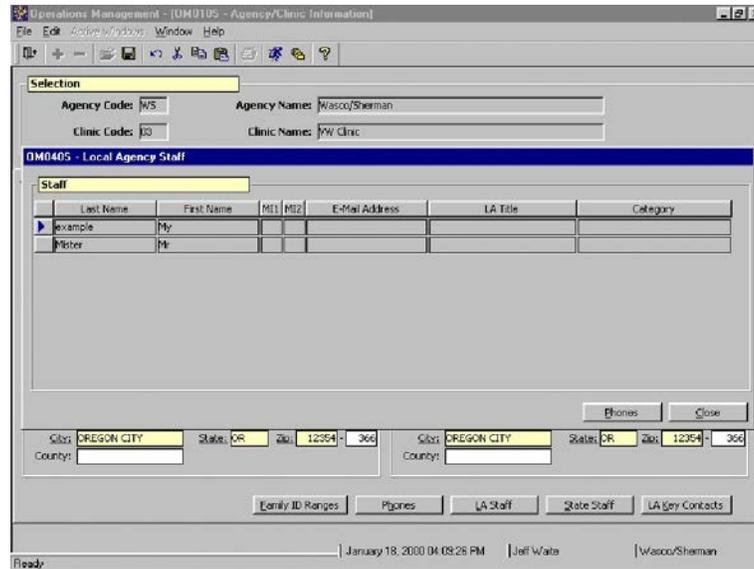


Figure 7: “Local Agency Staff” Pop-Up

- 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.**

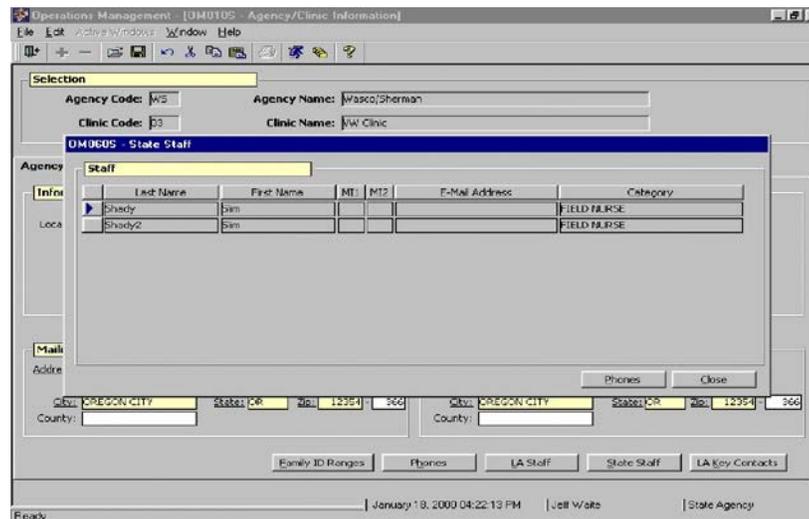


Figure 8: “State Staff” Pop-Up

- 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.**

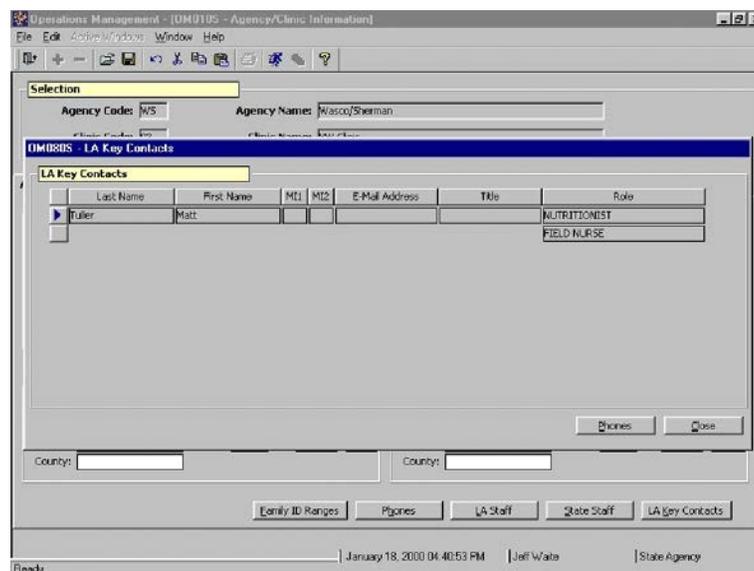


Figure 9: “LA Key Contacts” Pop-Up

- 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 is 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.

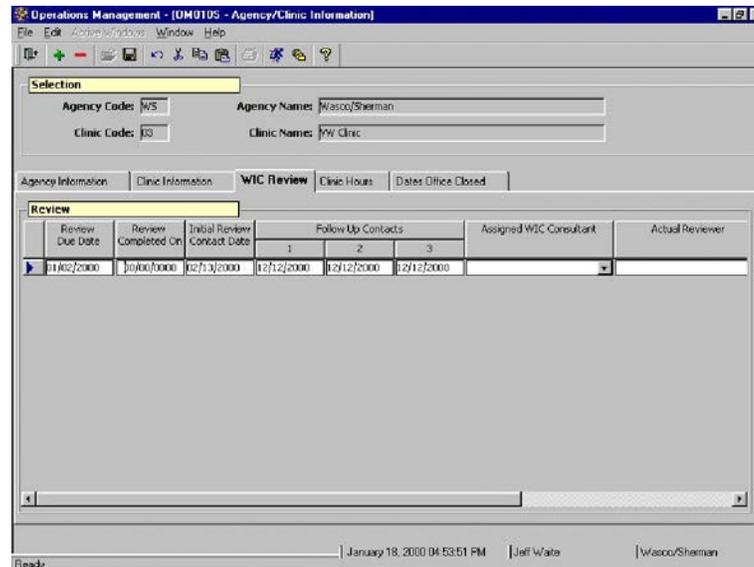


Figure 12: “WIC Review” Screen

- 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.

| Day | First Set Clinic Hours | | Second Set Clinic Hours | | First Set Phone Hours | | Second Set Phone Hours | |
|-----------|------------------------|-------------|-------------------------|-------------|-----------------------|-------------|------------------------|-------------|
| | Open Time | Closed Time | Open Time | Closed Time | Open Time | Closed Time | Open Time | Closed Time |
| Monday | 08:00 AM | 05:00 PM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM |
| Tuesday | 08:00 AM | 05:00 PM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM |
| Wednesday | 08:00 AM | 05:00 PM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM |
| Thursday | 08:00 AM | 05:00 PM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM |
| Friday | 08:00 AM | 05:00 PM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM |
| Saturday | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM |
| Sunday | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM | 00:00 AM |

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.

| From Date | To Date | Reasons Office Closed | Notes |
|------------|------------|-----------------------|-------|
| 00/00/0000 | 00/00/0000 | | |

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:

This page intentionally left blank.