

## **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.

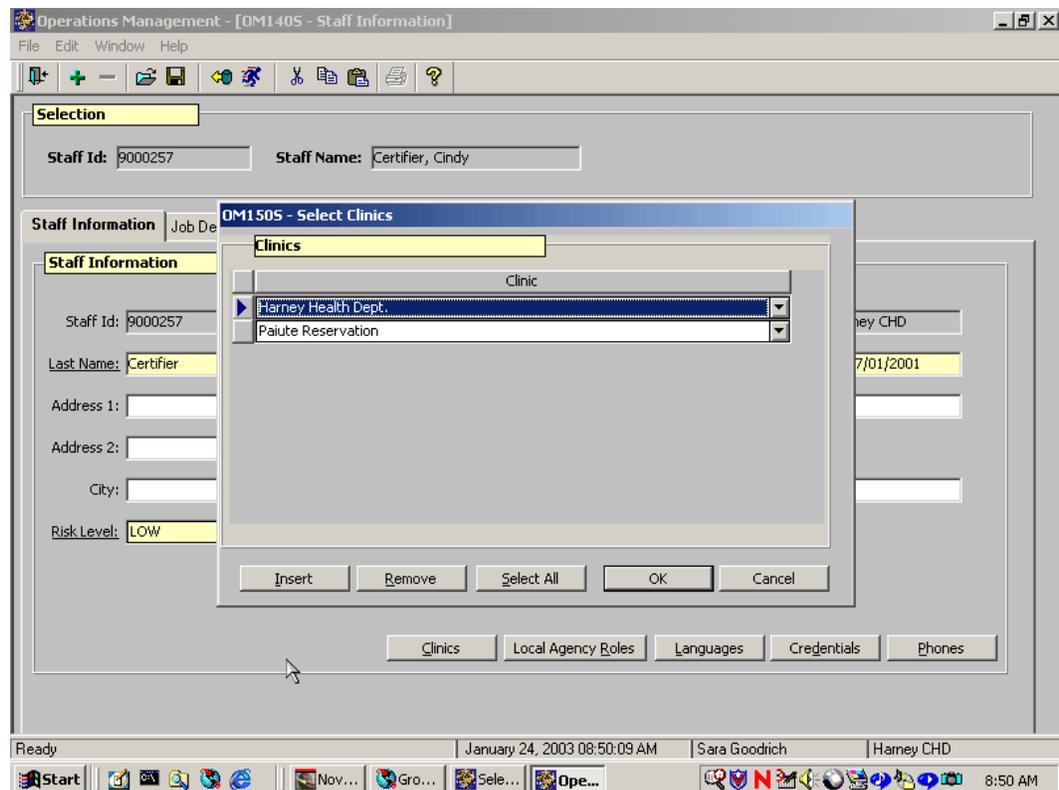
- If this field is not completed, the real name of the staff person will display on your appointment schedule.
- 1.9 **“Risk Level”** is the WIC participant risk level the staff member is qualified to serve.
- This field links directly with the Appointment Scheduler to match clients with staff appropriately.
  - 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.**



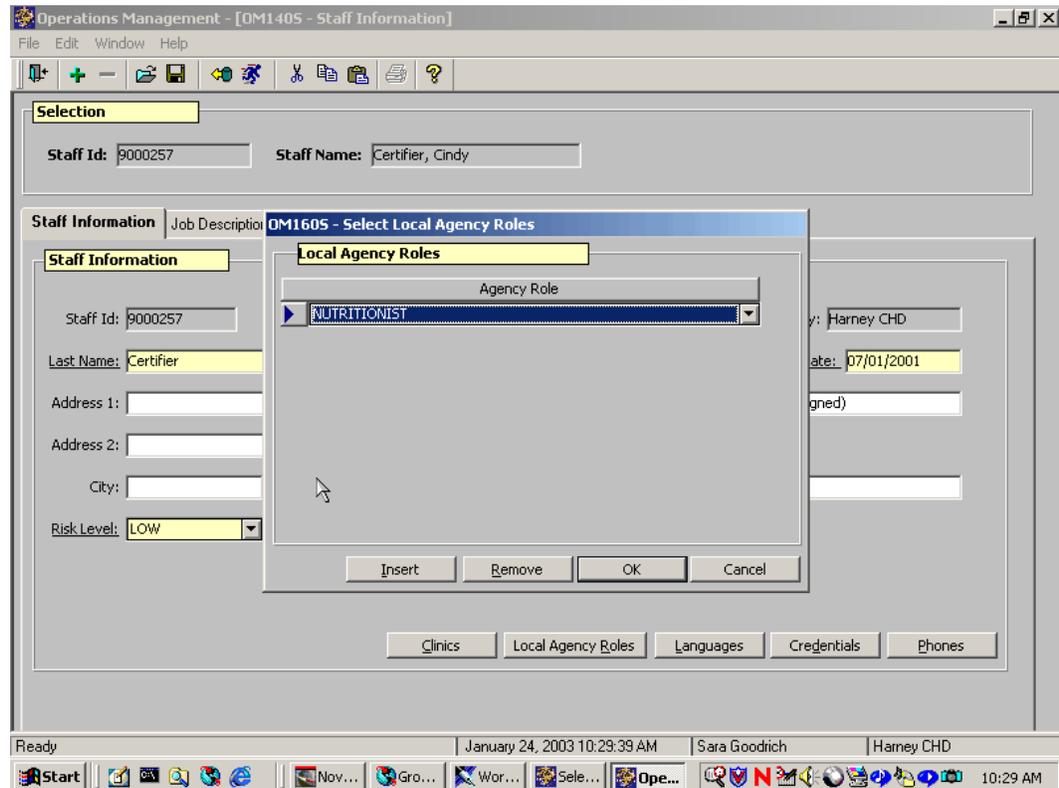
**Figure 2: “Clinics” Pop-Up**

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.**



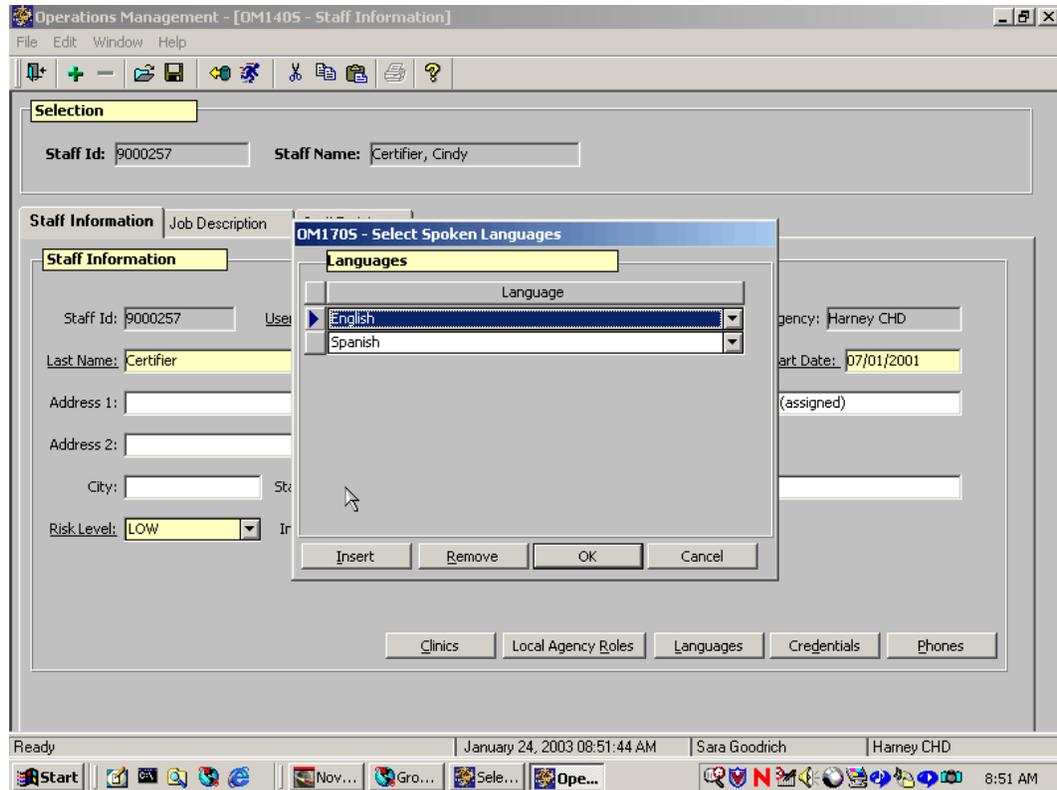
**Figure 3: “Local Agency Roles” Pop-Up**

- 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.**

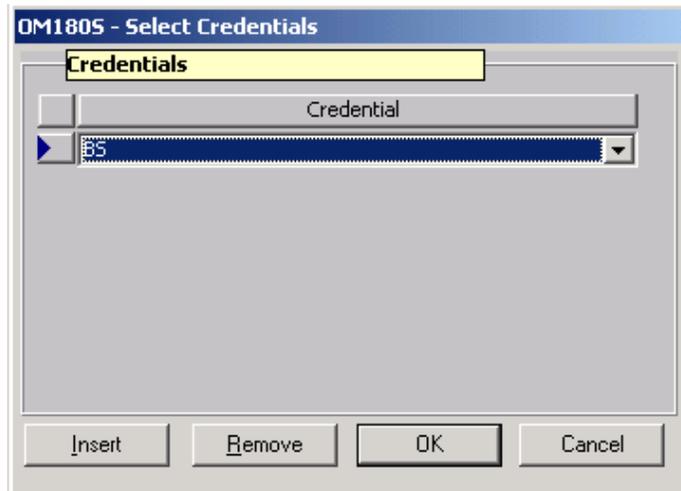


**Figure 4: “Languages Pop-Up**

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

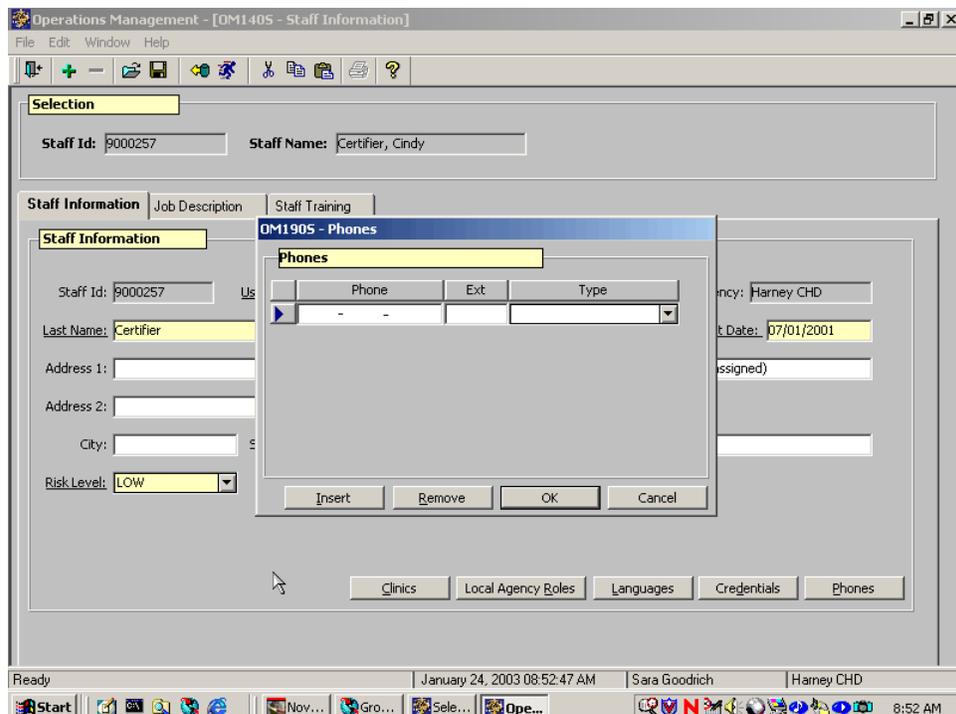
- This information links directly to the Appointment Scheduler as a criterion for matching a client to a staff member.
- The pop-up will default to English unless you select another language.
- The buttons on the pop-up work the same way as the “Clinics” pop-up.

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.”

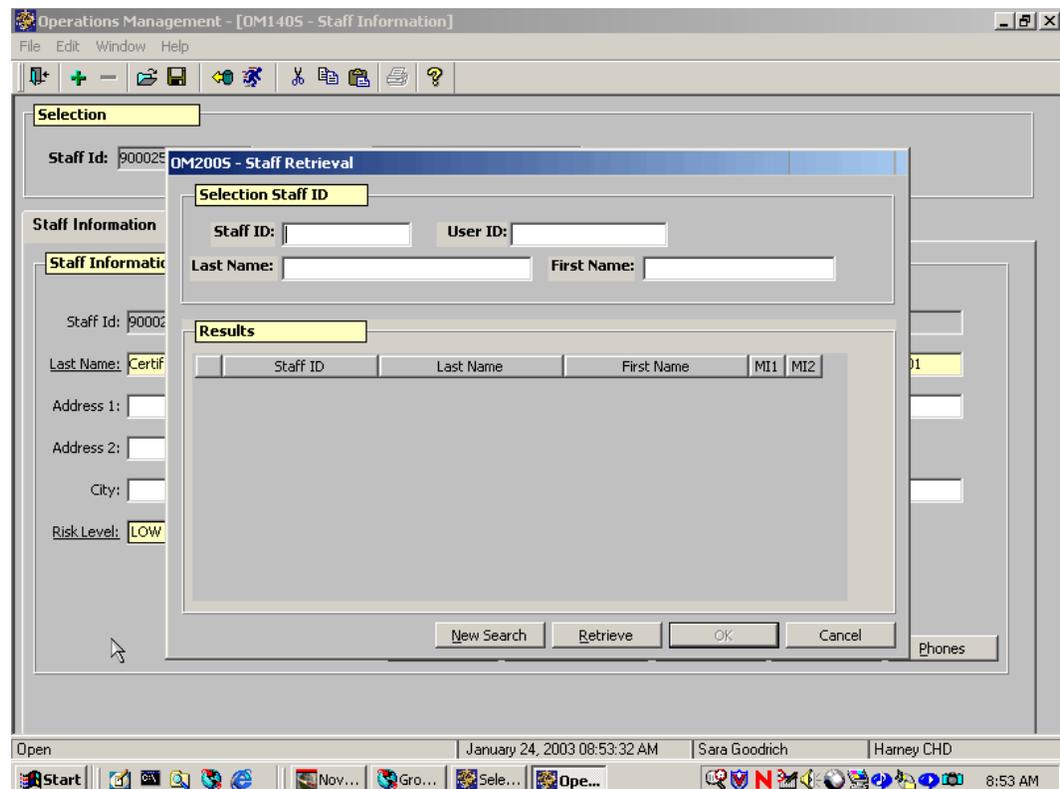
27. Click on the “Phones” button.
28. Enter your phone number(s) and select the type of phone(s) using the drop down arrow.
29. Click “OK.”
30. Exit back to the “Select Modules” screen.

## **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

The screenshot displays the 'Job Description' screen within the 'Operations Management' application. The window title is 'Operations Management - [OM1405 - Staff Information]'. The interface includes a menu bar (File, Edit, Window, Help) and a toolbar with various icons. Below the toolbar, there is a 'Selection' section with two text boxes: 'Staff Id: 9000257' and 'Staff Name: Certifier, Cindy'. Underneath, there are three tabs: 'Staff Information', 'Job Description', and 'Staff Training'. The 'Job Description' tab is selected and highlighted. It contains a table with the following data:

Staff Category	% of FTE	Hrs Per Week	FTE Funding Source	LA Staff Title
PARAPROFESSIONAL CERTIFIER (C)	100.0000	40.0000	WIC GRANT	CERTIFIER

The bottom of the window shows a taskbar with the Start button, several application icons, and a system tray displaying the date and time: 'January 24, 2003 08:54:57 AM', the user name 'Sara Goodrich', and the location 'Harney CHD'. The system clock shows '8:54 AM'.

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.

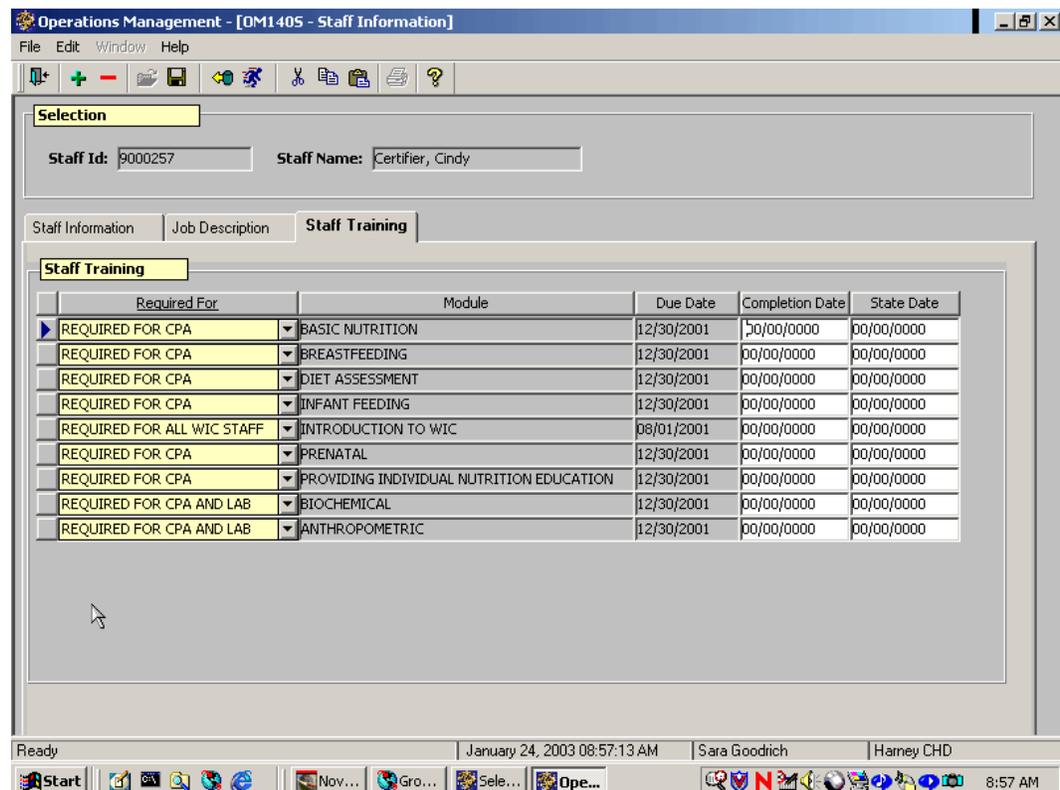


Figure 9: “Staff Training” Screen

- 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.

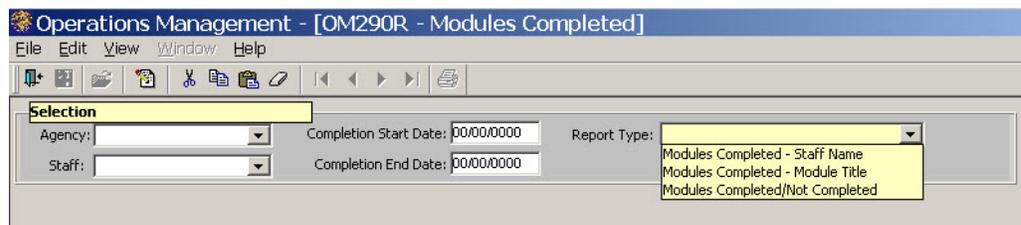
♪ **Note:** If a new module replaces a module that the staff member has already completed, both modules will be listed. If the staff member does not have to complete the new module, you may either leave the field blank or fill the date field with nines (9) to indicate a void field. Either of these options 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		04/19/2011	
Report ID: DM290R		Agency: WIC State Agency	
Modules Completed - Staff Name			
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		04/19/2011	
Report ID: OM300R		Agency: WIC State Agency	
Modules Completed - Module Title			
Staff Name	Completion Date	Required For	State Date
Agency Name: WIC State Agency			
<b>BASIC NUTRITION</b>			
McGee, Kim	02/02/2005	CPA	
<b>BASIC NUTRITION ONLINE 2010</b>			
McGee, Kim	02/02/2005	CPA	
<b>BREASTFEEDING LEVEL 1 - 2004</b>			
McGee, Kim	02/02/2004	ALL WIC STAFF	
<b>BREASTFEEDING LEVEL 2 - 2004</b>			
McGee, Kim	12/01/2004	CPA	
<b>CHILD NUTRITION ONLINE 2011</b>			
McGee, Kim	09/09/9999	CPA	
<b>DIET ASSESSMENT</b>			
McGee, Kim	02/02/2005	CPA	
<b>DIETARY RISK - 2007</b>			
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
<b>AgencyName: WIC State Agency</b>			
<b>Staff Name: McGee, Kim</b>			
<b>Start Date: 08/01/2004</b>		<b>Time Worked: 6 yr. 8 mo.</b>	
<b>CPA Date:</b>			
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:**