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 be 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.**

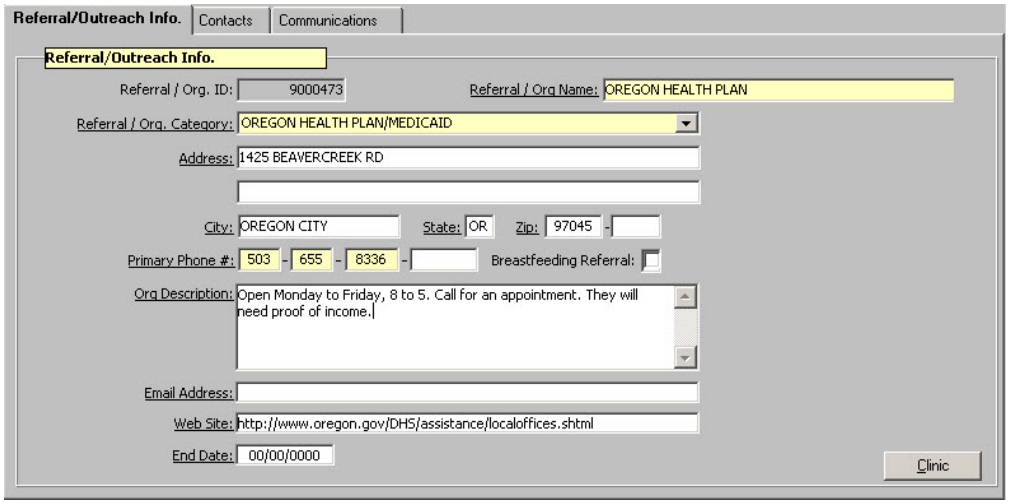

Figure 1: "Referral/Outreach Information" Screen

   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.

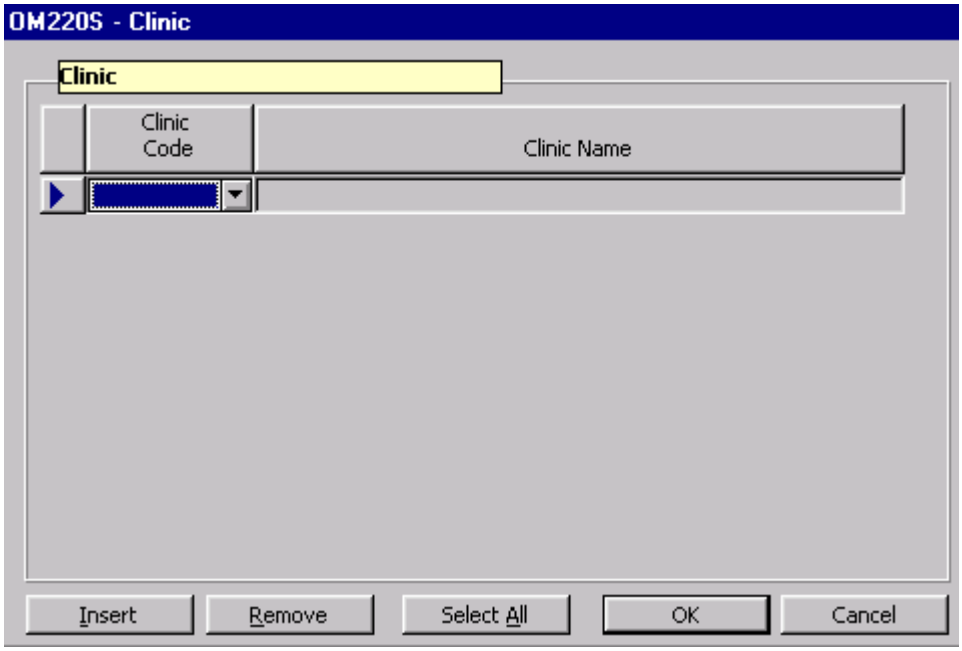

Figure 2: "Clinic" Pop-Up

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.**

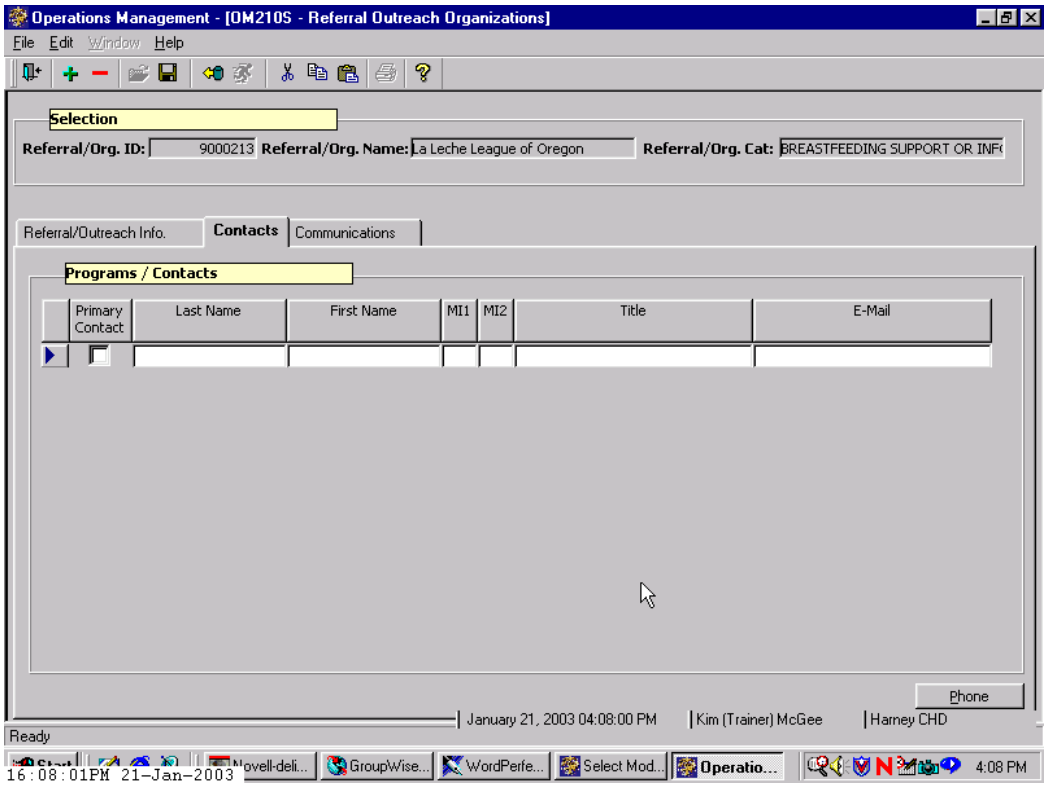

Figure 3: "Contacts" Screen Tab

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.**

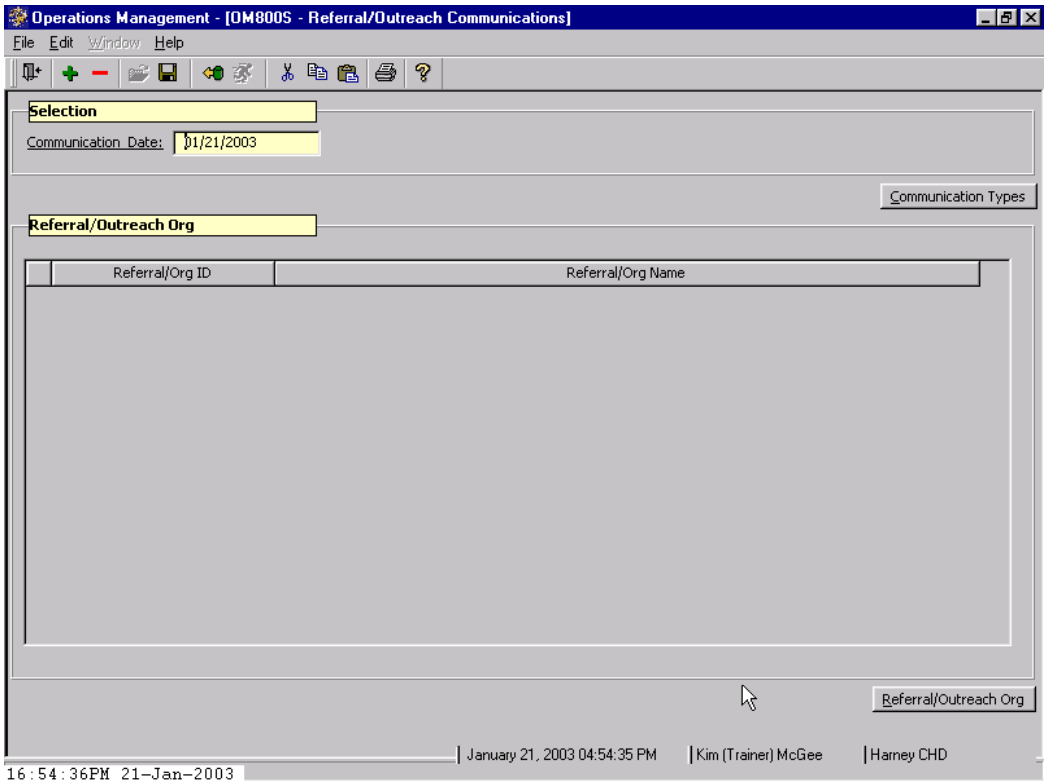

Figure 4: "Referral/Outreach Communications" Screen

- 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.

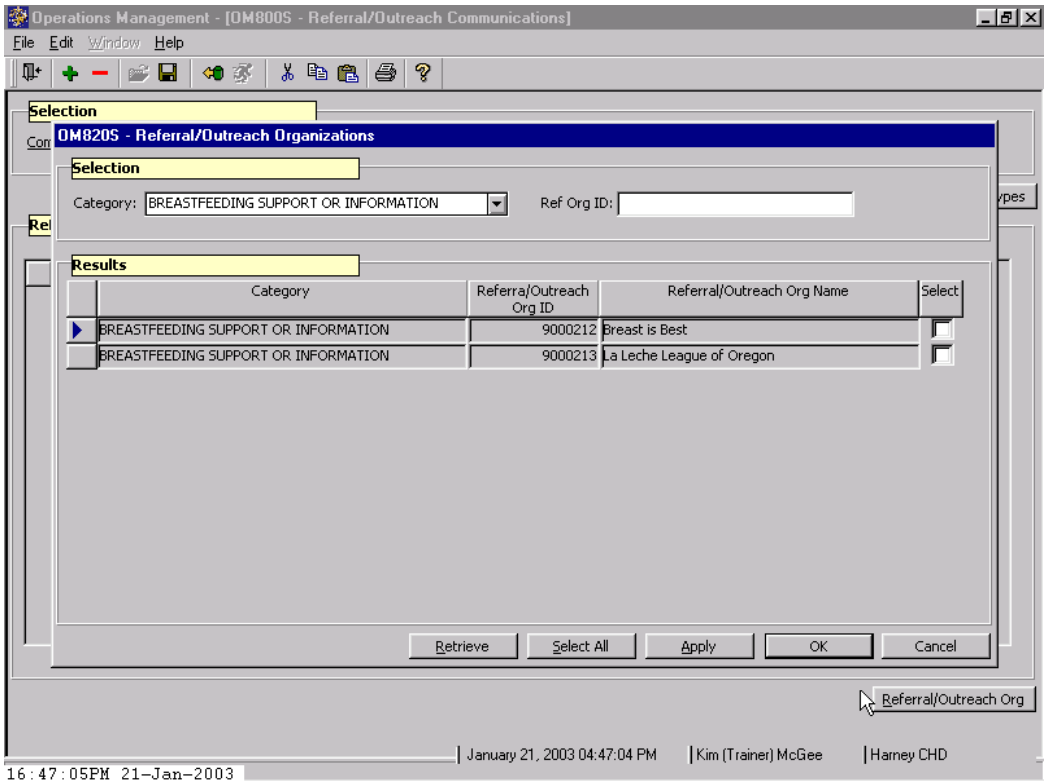

Figure 5: "Referral/Outreach Organizations" Pop-Up

- 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.**

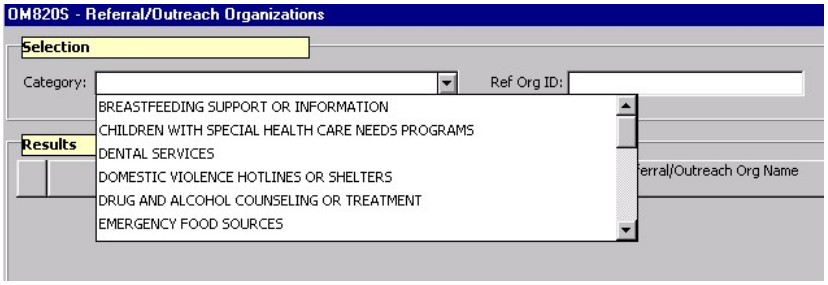

Figure 6: "Category" Field

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.**

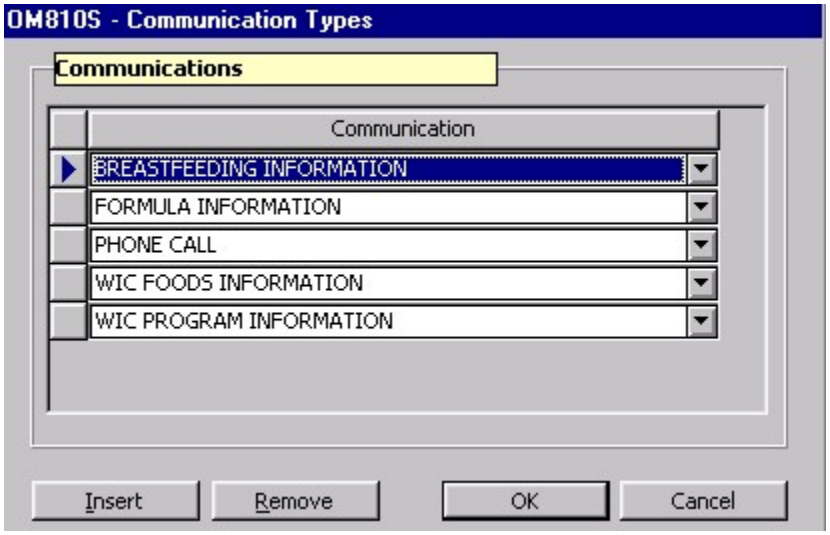

Figure 7: "Communications Type" Pop-Up

- 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**."

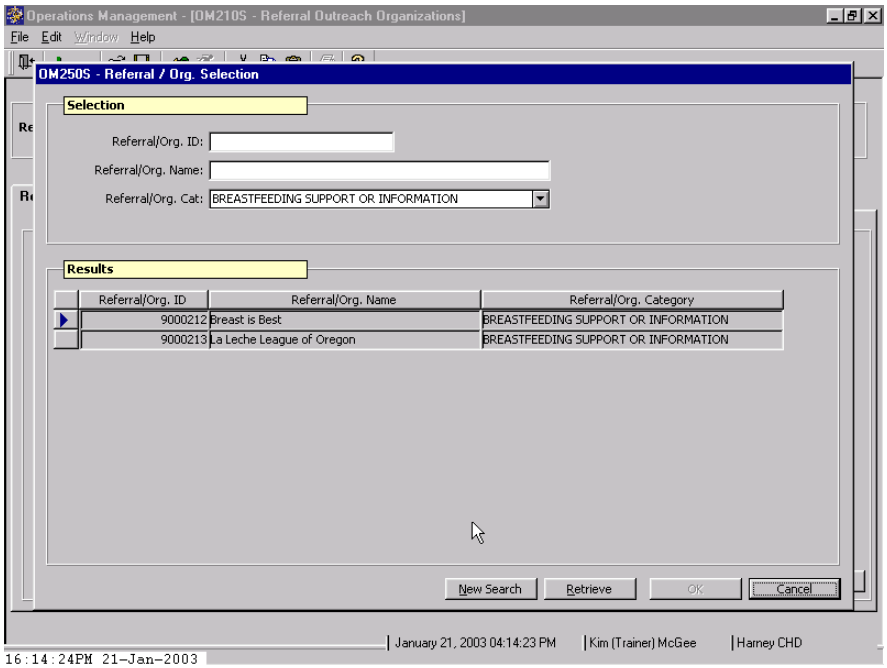

Figure 8: "Referral/Organization Selection" Pop-Up

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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