3-2   Getting ready for the OTIS appointment scheduler

Version Date: 5/27/2021

OTIS has many of the same appointment scheduling features as TWIST, but there are some differences that may make a difference in how you plan your clinics and staff schedules. Use this information about how clinics and clinic names are used differently to make some decisions about your agency.

Action Needed: Notify your state nutrition consultant by 6/11/2021 of any clinic name changes for OTIS. This will not impact TWIST.
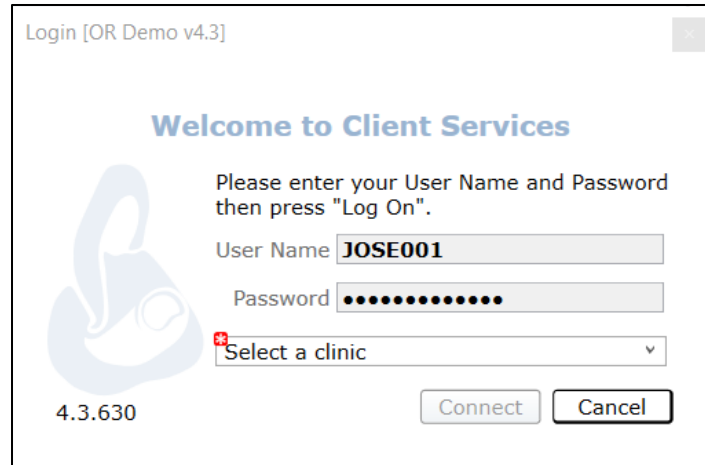
Agency and clinic names in OTIS

Agency and clinic names entered at the state
- Agency and clinic names will all be entered into OTIS at the state. That means that when you want to add or delete a clinic, you will contact the state office. Any changes made will be seen system wide and will stay consistent from agency to agency.
- Agency and clinic names are entered in one location in OTIS and **the same agency and clinic names will show up system wide**, regardless of where it is being used. That means the same clinic name will be used on reports, in the appointment book, in appointment notices, in search screens, etc.
- Agency names will include the full title rather than abbreviations since it will be used in information seen by participants and partners, i.e. Clackamas County Public Health, Deschutes County Health Department, or Confederated Tribes of Warm Springs.

Signing into OTIS

- When staff sign into OTIS, they will select which clinic they are working in rather than just the agency. The clinics to choose from are the same ones we talked about above.
- Once signed into a clinic, staff will be able to see information for the entire agency associated with that clinic. They will not be restricted from seeing other clinic info, but it will focus the appointment schedule on the clinic they signed into.
- Staff security set up at the state will determine which agencies a staff person can access. That means that staff working for more than one WIC local agency will be given one login that will allow them to see all the clinics they work for.
    - To reduce confusion for staff with access to multiple agencies, all clinic names will start with a short version of the agency name, i.e. Clatsop – Astoria, UCAN – Roseburg, or UMHS – Hermiston.

Setting up clinics in OTIS

Current TWIST clinics

- Clinics currently set up in TWIST will convert to OTIS, along with their addresses and assigned caseloads.
    - At Special User training you will have a chance to update specific clinic details like address, phone numbers, and clinic hours.

Consider your reasons for how your clinics are named

- Does your agency set up different clinics based on the location where participants are seen? Each clinic has an assigned caseload, reports, and appointment schedule.
    - This will continue in OTIS.
- Does your agency set up clinics based on characteristics of the participants assigned to the clinic, such as based on language spoken or who they need to see? OTIS might help solve scheduling issues based on characteristics other than location such as Nutritionist clinics or Foster clinics.

- o OTIS has additional functionality that will make it easier to schedule participants by language (matching participant language to staff member language qualifications).
- o OTIS has 10 Local Use appointment types (similar to F1, F2, F3) that will be set up by each agency and can be restricted by participant category or staff person assignment.
- o OTIS has 10 Local Appointment Preferences that will be used by agencies that wish to schedule participants based on staff culture, specialty, or characteristic.
- o OTIS has additional appointment types specific to dietitians, peer counseling, breastfeeding follow-ups, and online education which may make it easier to schedule participants needing those services.

Clinic drop downs

- Clinic names will appear alphabetically in drop downs. If you have a lot of clinics, you may find that the clinics you select most often are buried at the bottom of the list.
  - o Some folks put in a number so certain clinics show up at the top of the list, but that number is going to show up in appointment notices that go to participants.
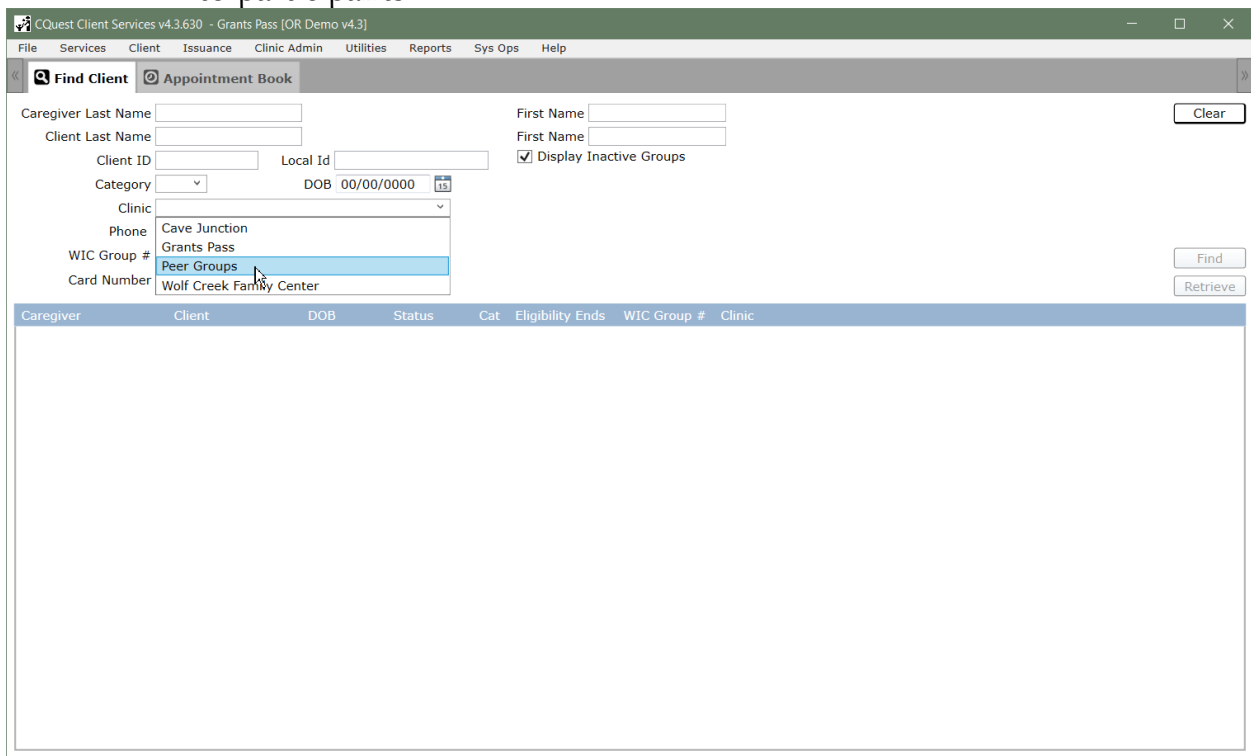
Clinic names and appointment notices

Appointment notices are highly automated in OTIS and will be the same statewide. Based on input from local agency staff, statewide templates for appointment notices to let participants know an appointment has been auto-scheduled, appointment reminders and no-show notices have been drafted.

OTIS will send out appointment reminders automatically by text or email in the 12 primary languages Oregon prints materials. Agencies will be able to print standard notices as letters to be mailed.

- Local agencies will not be able to modify any appointment notice produced by OTIS.
- Notices will have standard formats that use information from OTIS to fill in blanks such as participant name, appointment date, time, type, location, clinic name, what to bring, and phone numbers to call.
- This information will be in English exactly as it is entered in OTIS. Only the standard template language will be translated into the 12 available languages.
- Appointment notices will include the **clinic name** exactly as it is entered in OTIS followed by the standard template language of "WIC clinic" or "WIC program" as appropriate so they don't have to be included in the clinic name.
  - Some agencies currently use clinic names like "Hispanic," "Foster," "Teen," "EWCG" which may make sense to WIC staff but don't work well in appointment notices.
  - Agencies may want to change clinic names to something that makes more sense to participants like "Familias hispanas", "Foster Families," "Teen Support," or spell out the name rather than an abbreviation.

Sample email appointment notice sent by OTIS

Email Subject Line: WIC Appointment Reminder

Email Body:
Hello, this is the {{Clinic Name}} WIC Clinic with an appointment reminder.

Your appointment is on {{Day of Week, Month & Day number}} at {{Appt Time}}. We will see you at {{Clinic address}}.

The people from your family with appointments are listed below. Please bring all the items listed under each name to the appointment.

{{Client First and Last Name (each listed separately)}}
{{Specific list of items to bring based on the appointment type, e.g. child, ID, proofs}}
Current WIC enrollment period ends {{Cert End Date}}

If you have questions or need to reschedule, please call the WIC office at {{Clinic phone number}}. A reply to this message will not reach the WIC office.

Thank you,
WIC Staff
{{Agency Name}}

Planning Activity

Since agency and clinic names will be used throughout the system, would you want to end any of your current clinics before you convert to OTIS?
Remember: You can end-date clinics, transfer participants into other clinic, or change names for clinics any time in TWIST.

1.   Do you want to change any of your current clinic names to make them more appropriate for appointment notices in OTIS?

Action Needed: Notify your state nutrition consultant by 6/11/2021 of any clinic name changes for OTIS. This will not impact TWIST.