OTIS NOTICE

2/25/2021

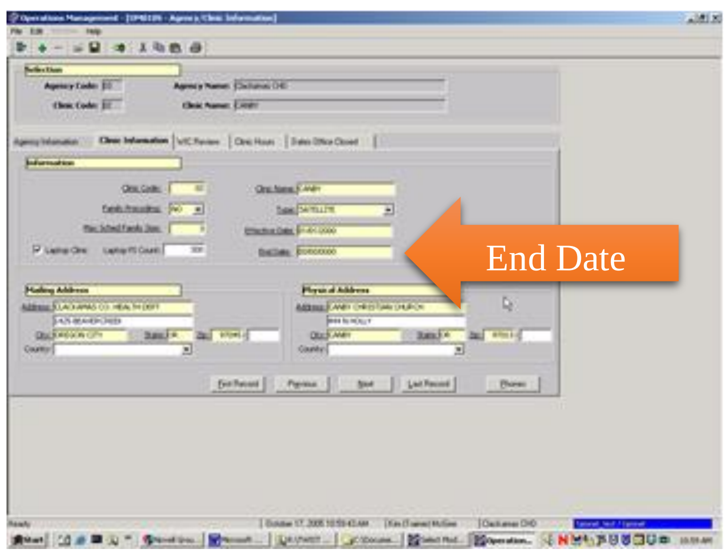
Task: System clean up needed by 4/30/2021 to prepare for OTIS data conversion

Moving all the information and data from TWIST to OTIS is a huge and very complicated task called data conversion. We want to make sure data being used is converted but old or out of date information is not. Over the next several months we will be asking you to review data in TWIST and clean it up if needed.

- This month we are starting with cleaning up **clinic and staff information**. This clean up must be done by 4/30/2021 to make sure we aren't cluttering up OTIS with staff that are no longer working in WIC or clinics that are no longer active.
- Use the instructions below to clean up the information.

Clean up clinic data

[TWIST Training Manual Lesson Chapter 8, Lesson 100]



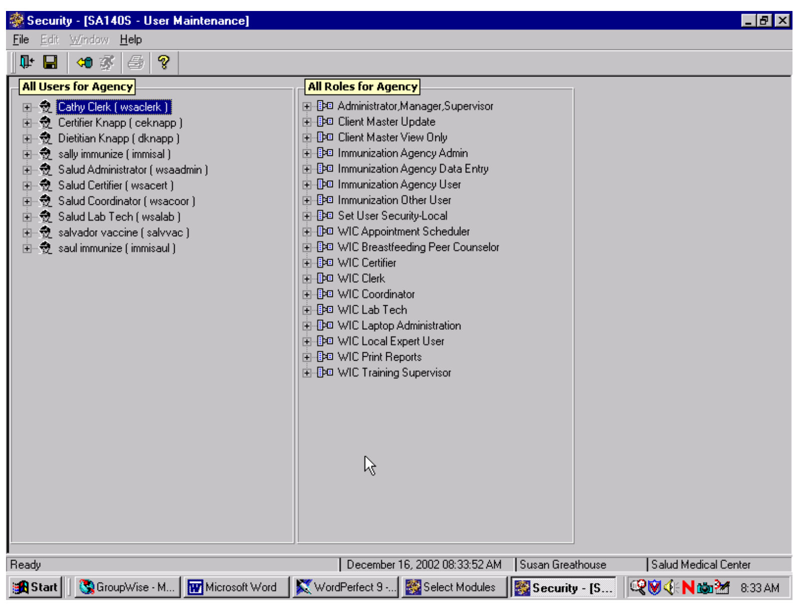
1. Open the "Operations and Management" module, the select "Agency/Clinic" from the "Operations" file menu.
2. Click on the "Clinic Information" tab.
3. Update any information that is not current or correct, including the information on the "Phones" pop-up.
4. Use the "previous" and "next" buttons to review each clinic.
5. Be sure to enter an "End Date" for any clinic that is no longer actively being used.

Clean up staff data

[TWIST Training Manual Chapter 8, Lesson 101]

- We need correct information for current staff, so please review all staff to make sure they have the correct languages spoken, current phone numbers, and email addresses if possible.
- Make sure that staff that are currently employed are marked as permanent staff.
- Use the blue "open" folder icon on the "Staff Information" screen to search for a staff person.
    - Leaving the selection criteria blank when clicking "retrieve" will bring up all the records for your agency, so you can find staff names that are not familiar to you.
- In the next week, we will be sending you an Excel spreadsheet listing all staff assigned to your agency. This will make it easier to search for, review, and update staff information.
- End date all staff that are no longer working in WIC in your agency.
- Use the instructions on the next page to follow the 3 steps that will ensure staff are no longer shown in your agency.

Step 1: Remove the security access for the user.

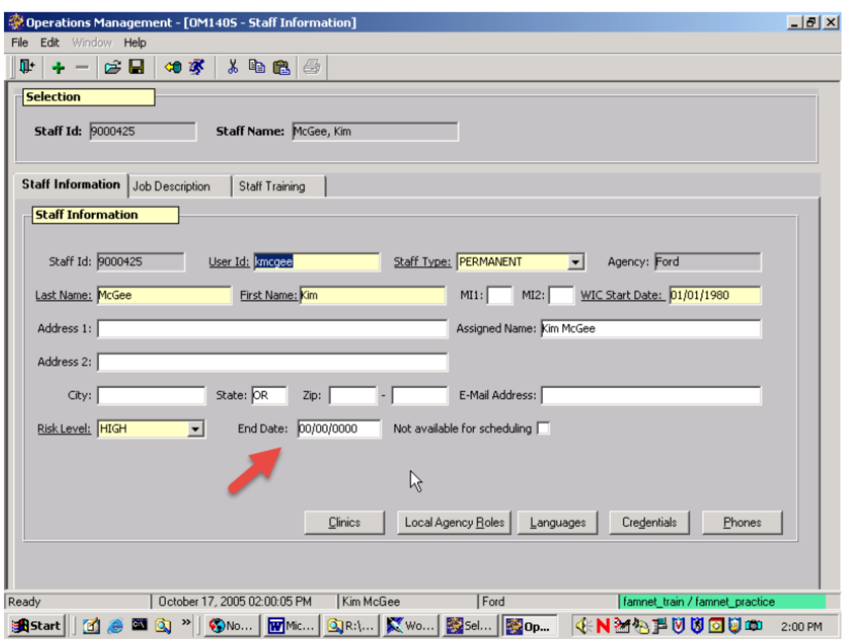


1. Access the "Security" Screen from the "Select Modules" screen, click on the "Security" tab, and then click on "Security Control" icon.
    a. Only the WIC Coordinator and the designated System Administrator will have access to this area in Family Net.
2. From the "Maintain" menu select "User."
    a. This will open a two-column window. One side will display all the "**Users**" for this particular agency, listed by both their assigned name and their User ID. The other side is a list of all the available "**Roles**."

3. Remove the User from the Security module by positioning the cursor on the staff name you are removing. Right click on the mouse to display a choice of four actions.
4. Select “Edit User Roles.”
    a. User roles need to be deleted prior to removing the user.
    b. Click “Clear All”, and then Click “OK.”
5. Right Click on the user name. Select “Remove User.”
6. Verify the User name as shown.
7. Click “OK”
    a. Once you select “OK,” you will remove this User from the List of Users.

Step 2: End date the staff person in the Operations Management module.

1. Double click on the “Operations Management” icon.
2. From the “Operations” menu click on “Staff Information.”
3. Use the blue “open” folder icon to search for a staff person.
    a. Leaving the selection criteria blank when clicking “retrieve” will bring up all the records for your agency, so you can find staff names that are not familiar to you.
4. Retrieve any inactive staff members records.
5. Enter an “End Date” in the member’s record.



Step 3: Remove clinics assigned to end-dated staff.

1. Click on the "Clinics" button.
2. Highlight the assigned clinic and click the "Remove" button.
3. Remove all assigned clinics and the staff person will no longer show up on reports.