



Alaska WIC SPIRIT Readiness Guide

Local Agency Readiness Checklist for the Transition to SPIRIT

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TABLE OF CONTENTS

Table of Contents	ii
Purpose of Document.....	iii
1 Complete 1 - 2 Months Prior to Pilot / Rollout.....	1
2 Complete One to Two Weeks Prior to Pilot / Rollout.....	4
3 Complete Last Day of AKWIC Operation	6
4 Complete During the Week Agency is Closed Prior to Pilot / Rollout	7
5 Complete By the Day Prior to Pilot / Rollout	8
6 Complete First Day of Pilot / Rollout	9

PURPOSE OF DOCUMENT

This document provides information to help Local Agencies track critical activities to prepare for rollout. It includes target timeframes to allow for future planning. This plan is not all inclusive. Recommend that clinic coordinators and staff review this document together and devise a plan that best fits your specific clinic(s)

1 COMPLETE 1 – 2 MONTH PRIOR TO PILOT/ ROLLOUT

The following checklist provides items that must be completed prior to pilot/ rollout at each site. There are other activities that need to be started within this timeframe, but are included in the next section(s) based on completion date.

EQUIPMENT/ TECHNICAL READINESS

- Work with local IT to ensure the Internet Service Provider (ISP) is in place and telecommunications tests are successful for each local agency and clinic site
- If necessary, inform building management of transition dates and temporarily-changed schedule
- When SPIRIT equipment is available, request that local IT install the SPIRIT Client and test connection and Log In. Installation files are located at http://dhss.alaska.gov/dpa/Pages/nutri/wic/localagencies/la_spirit.aspx
- When the SPIRIT check overlay software and instructions are available for the new MICR printers. The files will be available at http://dhss.alaska.gov/dpa/Pages/nutri/wic/localagencies/la_spirit.aspx
- Local IT training date and time can be found at: http://dhss.alaska.gov/dpa/Pages/nutri/wic/localagencies/la_spirit.aspx

PARTICIPANT READINESS

- Notify participants that the new system is coming. Inform them that the clinic will be closed for one week, appointments (if applicable) will be scheduled lightly during the transition weeks, and that the look of the checks will be changing
 - ✓ Ask about any planned moves or changes as transfers will be accomplished only on an emergency basis during SPIRIT transfer
 - ✓ Find out whether checks can be printed or mailed earlier than normal.
 - ✓ Discuss any changes in the participants' situation that may affect the ability to get benefits to them during the transition to SPIRIT.

CLINIC READINESS

- Continue developing and discussing changes to clinic flow and new hardware (scanners and signature pads) locations. Hopefully, the UAT attendees have more familiarity with the SPIRIT requirements
- Consider schedule options for the weeks around the transition to make up for light scheduling and staff ramp up during the initial week(s) of transition. Some options to consider include:
 - ✓ Try to shift any walk in clinics from the first few days of SPIRIT operations so you can better control the influx of participants requiring services. These could be scheduled for the week before the transition or later in the transition week
 - ✓ Reduce the number of appointment slots on the first few days of SPIRIT.
 - ✓ Add extra appointment slots the week before the transition if possible to get as many participants their benefits as possible prior to the SPIRIT transition
 - ✓ Print as many Mailed benefits in the week(s) prior to SPIRIT Just in Time (JIT) training. Consider printing quarterly FIs during the month prior to rollout
 - ✓ Extend certification periods where possible
 - ✓ Request that participants come in early (or contact them early) and certify for the following month
- Determine the amount of quarterly check stock required for your agency and contact Amy George (amy.george@alaska.gov) to place your order.

USER READINESS

- Ensure your agency staff is aware of the suggested procedures during the transition from AKWIC to SPIRIT
“Tips to Prepare for SPIRIT implementation” at
http://dhss.alaska.gov/dpa/Pages/nutri/wic/localagencies/la_spirit.aspx
- Coordinators review previously submitted list of SPIRIT users to ensure all required information has been submitted to obtain user IDs and passwords for SPIRIT.
- When determining clinic flow, consider any hardware changes (i.e., signature pads, scanners) or business process changes that must be communicated to staff
- Notify staff of transition dates and responsibilities to ensure vacations and other commitments are scheduled accordingly

2 COMPLETE ONE TO TWO WEEKS PRIOR TO PILOT/ ROLLOUT

The following checklist provides items that must be completed and verified one to two weeks prior to commencement of pilot/ rollout at each site. This means that planning must begin several weeks or months before the rollout date.

EQUIPMENT/ TECHNICAL READINESS

- All computers, new MICR printers (model 9712), peripheral equipment and supplies are received, inventoried and stored in a secure place
- Computers, networking hardware, and all peripherals, cables and cords, are set up and operational with all required software
- Adequate (working) Internet connection from all workstations
- Scanner(s) set up at appropriate location
- Signature pads set up and operational
- Default printers are set up correctly for document and benefit printing
- Source Technologies software for the check overlay has been loaded and tested on MICR printers
- Local IT staff have been notified and are available (if necessary) to provide support
- WIC SPIRIT Help Desk Contact info available for appropriate network support:
http://dhss.alaska.gov/dpa/Pages/nutri/wic/localagencies/la_spirit.aspx
- Wherever possible the SPIRIT client has been loaded onto user computers and the access to the SPIRIT application has been tested

USER READINESS

- Ensure users have completed all applicable trainings and have materials available for support for day one of roll-out
 - ✓ SPIRIT User Notebook from Just In Time training
 - ✓ Training modules available on WIC Web Site:
http://dhss.alaska.gov/dpa/Pages/nutri/wic/localagencies/la_spirit.aspx.
 - ✓ Cheat sheets are available at each work station, AKWIC Food Package description, PFD multiplier, Workaround info, WIC SPIRIT Help Desk contact info, ...
- Coordinators confirm list of user IDs provided by State to ensure all users have been set up with the appropriate roles
- Users test their Windows login and password on any computers they will need to use (when available)

CLINIC/ WORKFLOW READINESS

- Coordinators have reviewed clinic flow changes and determined appropriate locations for signature pads and scanners
- Coordinators have determined Local Agency process for answering phones, prescreening participants, etc.
- Coordinators should be sure that every workstation and phone has a “sticker” with the WIC SPIRIT Help Desk phone number and email address
- Ensure adequate blank benefit stock for new system is available and secured. SPIRIT will use a new type of check stock. Be sure that local IT is aware of the new SPIRIT check stock; the SPIRIT check stock should be loaded into the new MICR printers and used for SPIRIT benefit test printing.
- Master Calendar worksheets are complete
- If necessary, change message on answering machine/phones about temporary changes in clinic hours or operations

3 COMPLETE LAST DAY OF AKWIC OPERATION

The following checklist provides items that must take place on the last day of clinic operation using AKWIC. The following week the clinic will be closed and clinic staff will be in training (JIT).

EQUIPMENT/ TECHNICAL READINESS

- Run and print the 505A Active Participation by clinic report for previous and current month
- Run and print the 505E Enrolled Participation by clinic report for previous and current month
- Run and print any AKWIC report will required for the quarterly reporting
 - ✓ *Examples would include: Overweight, Breastfeeding, Anemia, etc.*
- Run report showing the most recent AKWIC Food Package prescribed

USER READINESS

- Ensure users are aware of the work schedules for the first week of SPIRIT operation
- Ensure completed SPIRIT materials are available:
 - ✓ Training modules available on WIC Web Site:
http://dhss.alaska.gov/dpa/Pages/nutri/wic/localagencies/la_spirit.aspx.
 - ✓ Cheat sheets are available at each work station to include, AKWIC Food Package description, PFD multiplier, Workaround info, WIC SPIRIT Help Desk contact info, ...

CLINIC/ WORKFLOW READINESS

- After last participant is served in AKWIC, print appointments that are currently scheduled (if applicable)

4 COMPLETE DURING THE WEEK AGENCY IS CLOSED PRIOR TO PILOT/ROLL OUT

The following checklist provides items that must take place before roll-out. All clinic staff will be in Anchorage attending training. These steps will be done by the Local IT staff.

EQUIPMENT/ TECHNICAL READINESS

- AKWIC: Shut down server (NO activity can occur on the AKWIC server at this point)
- SPIRIT: Set up of machines to be used with SPIRIT (if not previously done)
- SPIRIT: Ensure internet connectivity for each machine (if not previously done)
- SPIRIT: Ensure printers are installed and can be used with each machine. Print a test page from each computer to ensure correct communication with printers
- SPIRIT: Follow the Printer Set Up Procedures provided by the State to test check printing. The Printer Setup document is located on the WIC website. http://dhss.alaska.gov/dpa/Pages/nutri/wic/localagencies/la_spirit.aspx.

CLINIC/ WORKFLOW READINESS

- User Builds SPIRIT Clinic Master Calendar during JIT training.

5 COMPLETE BY THE DAY (AGENCY CLOSED) PRIOR TO PILOT/ ROLLOUT

The following checklist provides items that must take place JUST before roll-out.

EQUIPMENT/ TECHNICAL READINESS

- Continue to ensure network connectivity and verify configurations on all equipment (if necessary)
- IT change one SPIRIT production machine to the training environment, per the State directions located under the IT/Software Information section of the WIC website. This machine can be used to test the clinic setup. The test should include printing (benefits, documents, and reports), certifications, and using the signature pad and scanner.

USER READINESS

- Agency's Super User name and number (if applicable) is posted
- WIC SPIRIT Help desk phone number / e-mail address is posted at all computers
- Local IT Help desk phone number is available on or near all computers

CLINIC/ WORKFLOW READINESS

- SPIRIT User Guide should be available for Users

6 COMPLETE FIRST DAY OF PILOT/ ROLLOUT

The following checklist provides items that must take place on Day 1 of pilot/ rollout at each site.

EQUIPMENT/ TECHNICAL READINESS

- Local IT staff are available to provide support
- WIC SPIRIT Help Desk contact info available for network support

USER READINESS

- Coordinator will provide Users with SPIRIT login and password information (If not done already)
- Users login with SPIRIT login and password and ensure screens are accessible. Allow time to download updates from the central server. Update length will depend on connection speed
- Users have access to all available help and support functions and know what support options are available
- Conduct a “Kickoff” meeting prior to starting operations in SPIRIT:
 - ✓ Review hot topics and FAQ
 - ✓ Introduce any onsite staff who is supporting the clinic and their role.
 - ✓ Reiterate support options (onsite staff, Super Users, WIC SPIRIT Help Desk, Local IT support)

CLINIC/ WORKFLOW READINESS

- Place a laminated copy of the R&R form near each signature pad
- Cheat Sheets are available
- Adequate check stock and paper for new system is loaded in printer(s) in correct trays
- Begin scheduling know appointments