

For: State and County Offices

FY 2016 Outreach Tracking and Information System (OTIS) Changes and Enhancements

Approved by: Deputy Administrator, Field Operations



1 Overview

A Background

OTIS is a software application that supports outreach reporting requirements for National, State and County Office employees. The Outreach Staff oversees the management of the system. Annual updates are implemented in OTIS to create a more efficient and user friendly system.

B Purpose

This notice informs employees:

- about the implementation date and new URL for OTIS version 3.6
- about the removal and archival date of prior years' data in OTIS
- to discontinue reporting Farm Bill outreach activity on the DAFO SharePoint site
- about changes for entering activities in OTIS version 3.6.

C Contact

If there are questions about this notice:

- County Offices shall contact the applicable State outreach coordinator (SOC) listed in Exhibit 1
- State Offices shall contact Cynthia Cuellar, National Outreach Specialist, by either of the following:
 - e-mail to cynthia.cuellar@wdc.usda.gov
 - telephone at 202-690-4727.

Disposal Date	Distribution
January 1, 2016	State Offices; State Offices relay to County Offices

2 FY 2016 OTIS Features

A Implementing OTIS v3.6

System enhancements to OTIS were recently deployed.

Note: All States were previously required to have FY 2015 activities completed and closed out by October 16, 2015.

Offices can access OTIS v3.6 at <https://emso.fsa.usda.gov/otis/outreach/home.aspx>.

B Archival of OTIS Data

Following the FY 2016 upgrade, OTIS data for all previous years will no longer be available to users. The system upgrade requires archiving of the current system. However, the following information will **not** change and will be available in OTIS v3.6:

- previously approved partner organizations and contact information
- all user profiles
- user access and permissions.

If access to previous years' data is needed, SOC's shall submit a request by e-mail to fsaoutreach@wdc.usda.gov.

C Entering Outreach Activity Plans Correctly in OTIS

States and counties are required to plan and record outreach activities and events annually. Each activity must be aligned with 1 of the FSA outreach goals provided by the National Office. States have the ability to add 1 State-specific goal to the Strategic Outreach Plan (SOP) in OTIS.

Note: FY 2016 outreach goals will be available in the system after OTIS v3.6 is deployed. States should discontinue loading Farm Bill related outreach activities on the DAFO SharePoint site and resume loading in OTIS v3.6.

The following describes the entries made in OTIS.

- **Audience Type.** The requirement to determine an activity by audience type (general or targeted) has been removed from OTIS. The first screen of the activity plan screen requires the user to select an activity type.
- **Activity Type.** Users are required to select the type of outreach activity in OTIS under "Activity Type", then "Add an Activity".

Note: Media entries that are not specific to COC elections shall not be entered into OTIS. This includes broadcast media, direct/electronic e-mail, newsletters, and print media (press releases, posters, etc.). Employees shall continue to conduct media activities according to public information policy guidelines.

2 FY 2016 OTIS Features (Continued)

C Entering Outreach Activity Plans Correctly in OTIS (Continued)

- **FSA Programs.** Users are required to select the FSA program in which outreach was conducted. The program listing has been expanded and includes the following:
 - BCAP
 - CRP
 - ARC
 - PLC
 - MPP
 - DIPP
 - ELAP
 - LFP
 - TAP
 - TIP
 - LIP
 - NAP
 - FSFL
 - SSFL
 - MAL
 - LDP
 - FFP
 - ECP
 - EFRP
 - RTCP
 - Farm Ownership Loans
 - Farm Operating Loans
 - Emergency Loans
 - Guaranteed Loan Program
 - Microloans
 - Youth Loans
 - Acreage Reports
 - AGI
 - Farm Enrollment
 - USDA Employment
 - FSA Employment
 - KYF2
 - StrikeForce
 - Trade Mentorship
 - COC Election Outreach.

Note: Multiple programs can be selected.

An “Other” field has also been added which allows the user to indicate any program not included in the listing. If a user selects “Other”, there is a required entry field to insert the program outreach conducted.

2 FY 2016 OTIS Features (Continued)

C Entering Outreach Activity Plans Correctly in OTIS (Continued)

- **Demographic Profile.** The “expected number of attendees” is a required field.

The “gender”, “ethnicity”, “disability”, and “veteran status” fields are now optional. Each outreach activity plan should reflect a demographic breakdown of the gender, race, ethnicity, and disability of participants participating in outreach activities **only if** provided by the participant. This information shall **only** be recorded in the following situations:

- AD-2106 indicating race, ethnicity, and gender (REG) has been voluntarily completed by participant and is on file
- the event partner organization provided the State or County Office with the demographic participation data.

Percentage calculations have been removed and activity reporting now requires the actual number of participants, not percentages. Because of this change all applicable reports will provide actual participation numbers, not percentages.

- **Program Targets.** As provided in 22-AO, FSA has made program education (outreach) an integral part of program delivery. Targeted program outreach allows FSA to plan and promote specific programs to potential audiences. Each activity plan should not only indicate the specific FSA program the activity is planned for, but also the audience.

Users may now select from 1 or more of the following program targets listed in OTIS:

- Informational Session
- Tribal Outreach
- Recruiting Outreach
- COC Media
- Underserved Outreach – with the following selections:
 - New/Beginning Farmer
 - African American/Asian American/Pacific Islander/Latino/Veteran.

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2 FY 2016 OTIS Features (Continued)

D Reports

The following are new reporting features for FY 2016.

- **Ag Profile Statistics** – County and State users can generate a report in OTIS displaying the demographic breakdown of principal operators in their county and/or State obtained from NASS 2012 Ag census data.
- **Administration of User Profiles** – SOC's can export a user profile Excel report from the OTIS Manage User Profiles Screen by selecting the State and/or county. The report displays the user name, State, Service Center, status code, position title, responsibility (primary County Office Outreach Coordinator (COOC), backup) e-mail address, role abbreviation, and telephone number.
- **Ad Hoc Report** – Users can select from the new program target categories in ad hoc reports for report columns as actual and planned activities. This includes:
 - FSA Informational Session
 - New/Beginning Farmer Outreach
 - Underserved Outreach.

Users may also select from the specific underserved audiences the event is targeted to:

- New/Beginning Farmer
- Asian American
- Pacific Islander
- African American
- Latino
- Veteran
- Tribal Outreach
- Recruiting Outreach.

E FY 2016 OTIS Training

The National Outreach Office will provide employees with OTIS training to reflect the recent changes. Training will be offered to all SOC's after updates have been implemented. This training will be made available to and is required for all SOC's and COOC's. Report users are also encouraged to complete the training. Before granting new SOC's or COOC's access to OTIS, the training must be completed. SOC's should ensure that all COOC's have accessed and completed the updated OTIS training before working within the system.

Listing of SOC's

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