



## Oregon eWIC Implementation Training Successes in the Clinics

FNS EBT User Group Meeting

Alexandria, VA

July 20<sup>th</sup>, 2016

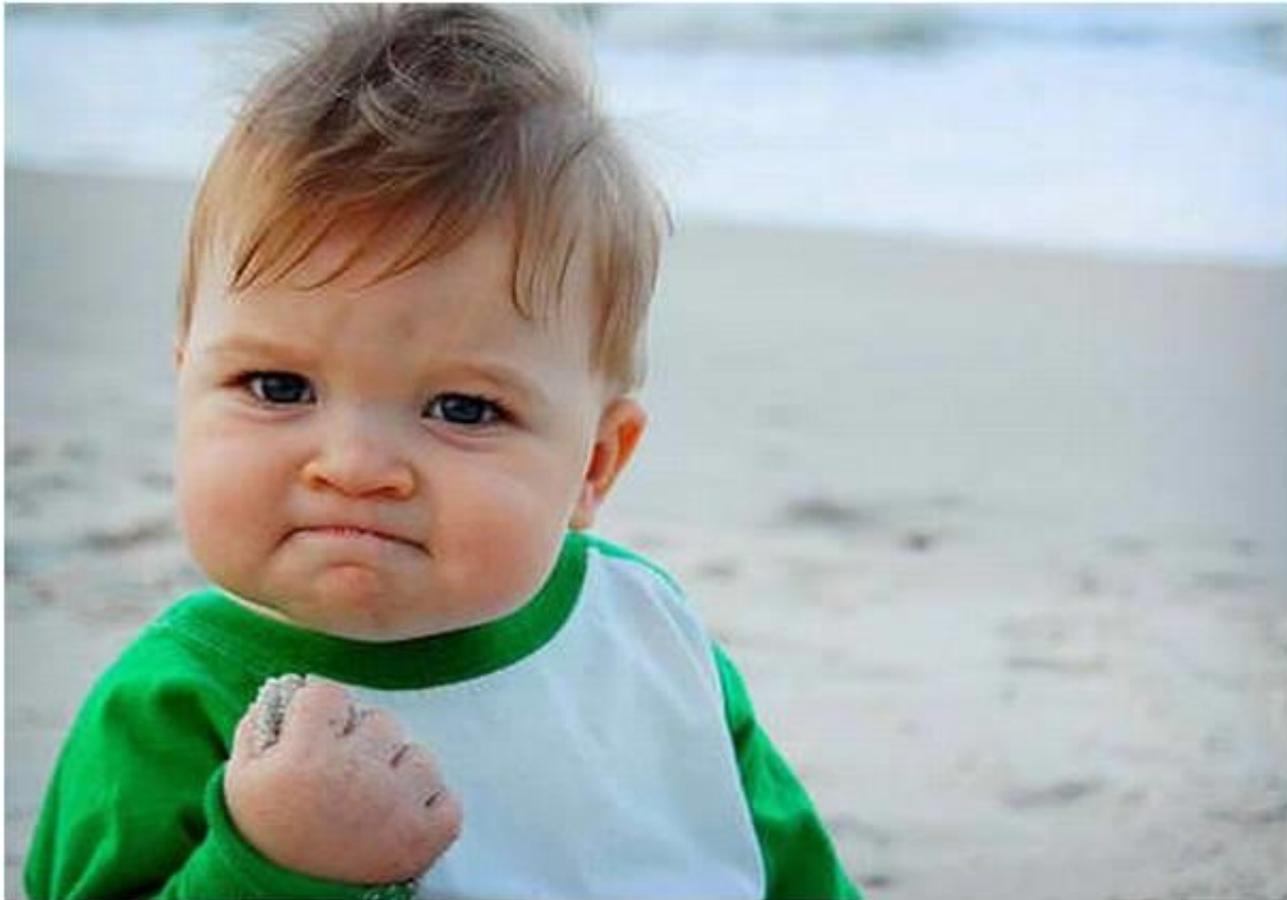
# Oregon WIC Program

- 45 state program staff
- 36 local agencies
- 94,000 participants per month
- Fixed (calendar) month benefit issuance
- 470 grocery vendors
- 72 pharmacy vendors
- 542 farmers

# Oregon eWIC Project

- Processor is FIS-CDP
- Pilot September 14 – December 14, 2015
- Rollout January 19 – March 7, 2016
- Last vouchers spent by June 30, 2016

# Some Tips for Success



Get Ready...

# Clinic eWIC Readiness Toolkit (CeRT)

Sections include:

- Introduction
- Conversion and participant notification
- Appointment scheduling and caseload management
- Clinic flow
- Equipment – current and new
- eWIC cards and inventory
- Participant materials
- Partner notification
- Policy changes

# Clinic eWIC Readiness Toolkit (CeRT)

Resources include:

- Readiness Activity Timeline
- Task Checklist
- Webinars
- Monthly Technical Assistance Conference Calls
- Glossary of Terms and Acronyms

<http://public.health.oregon.gov/HealthyPeopleFamilies/wic/Pages/ewic-toolkit.aspx>

# Readiness Activity Timeline

<b>Month</b>	<b>View this Webinar</b>	<b>Complete this Readiness Activity</b>	<b>Use this Clinic eWIC Readiness Toolkit section</b>
<b>-7 mo.</b>	<p>#1 eWIC Basics – Suggested audience: All WIC Staff                      #2 eWIC in TWIST – Suggested audience: All WIC Staff</p>	<ul style="list-style-type: none"> <li>• Review Section 1: Introduction to the Clinic eWIC Readiness Toolkit (CeRT) and develop a plan for completing the readiness activities.</li> <li>• eWIC Card stock                             <ul style="list-style-type: none"> <li>○ Plan for receipt, storage and distribution</li> <li>○ Plan for card inventory</li> </ul> </li> </ul>	<p>#1 Introduction to the Clinic eWIC Readiness Toolkit (CeRT)                      #6 eWIC Cards and Inventory</p>
<b>-6 mo.</b>	<p>#3 Conversion Plan – Audience: All WIC Staff</p>	<ul style="list-style-type: none"> <li>• Participant notification materials available for use in clinics – posters, individual flyers</li> <li>• Estimate amounts of existing equipment and materials needed through conversion and adjust ordering accordingly</li> <li>• Clinics receive new equipment for eWIC: cards, card readers</li> <li>• Record total number of sleeves of cards received on Monthly eWIC Card Inventory Log.</li> </ul>	<p>#2 Conversion and Participant Notification                      #5 Equipment                      #6 eWIC Cards and Inventory</p>

# Task Checklist

#	Task	Complete no later than:	Plan to Complete by:	Completed:
<b>Section 1</b>	<b>Introduction to the Clinic eWIC Readiness Toolkit – CeRT</b>			
	Develop a plan for completing all readiness activities.	5 months before conversion		
<b>Section 2</b>	<b>Conversion – Changing from Vouchers to eWIC</b>			
	Make a plan for notifying participants of the change to eWIC, including dates to begin.	3 months before conversion		
	Discuss how conversion processes impact voucher issuance and appointment scheduling plans in your agency in the months leading up to your agency conversion date.	2 months before conversion		
	Determine how each of the required conversion tasks will be completed for a family.	Conversion		
<b>Section 3</b>	<b>Appointment Schedule and Caseload Management</b>			
	Make adjustments to your agency's Appointment Schedule for staff planning and preparation, viewing required webinars, and attending required face-to-face training prior to eWIC conversion.	4 months before conversion		

Get Set...

# Webinars

- Live
- Recorded and made available on our website
- Compiled questions from live versions into FAQ document
- 10 Topics

<http://public.health.oregon.gov/HealthyPeopleFamilies/wic/Pages/ewic-webinars.aspx>

# Webinars

1. eWIC Basics
2. eWIC in TWIST
3. Conversion Plan and Participant Notification
4. Appointment Scheduling and Maintaining Caseload during Conversion
5. Changes that Impact Clinic Flow

# Webinars

6. Vendor Perspective and Shopper Education
7. Outreach Planning for Partners
8. Formula Warehouse – Managing Formula Orders
9. Conversion Changes in TWIST for eWIC
10. Celebration of Pilot and Report from Pilot Agencies on Conversion and Lessons Learned

# Monthly Technical Assistance Conference Calls

- Facilitated by state staff
- Provided local agency staff the opportunity to ask questions about eWIC readiness and implementation and get ideas from other local agencies

# Glossary of Terms and Acronyms

## Glossary of Terms

**Aggregated Food Benefit:** The combined food benefit for all participants in a household.

**Agency Conversion Date:** The date your agency is considered “converted”. After this date, when a TWIST user accesses the Food Package Assignment screen (FPA), the Family Summary Screen (FSS), or the new Family Cardholder Screen (FCS) for a family, TWIST will establish the eWIC “cut-off date” for that family.

**Assigned Food Benefits:** The benefits that have been assigned by the CPA to a participant for the certification period.

**Authorized Product List (APL):** A list that includes over 9,000 Oregon WIC-approved foods created for utilization among WIC agencies, vendors and participants for determining foods that can be redeemed with eWIC cards. The Authorized Product List includes each authorized brand/item with its product description, UPC, and package size. When approved, new products are added to the list and imported to Oregon WIC's database for the purpose of UPC recognition when using eWIC cards.

# Glossary of Terms and Acronyms

## Acronyms

APL	Authorized Product List
BIN	Bank Identification Number (first 6 digits of the PAN – indicating Oregon WIC)
CSR	Customer Service Representative
CVB	Cash Value Benefit (previously defined as Cash Value Voucher – CVV or Fruit and Veggie Voucher - FVV)
EBA	Electronic Benefit Account
EBT	Electronic Benefit Transfer
eWIC	Electronic WIC
FCS	Family Cardholder Screen (TWIST screen)
IVR	Interactive Voice Response
NDC	National Drug Code (used for some formulas)
PAN	Primary Account Number (Card Number)

GO!

# Local Clinic Staff Trainings

- Trained all 300+ local staff face-to-face
- 6 state trainers, trained in pairs
- 1 day trainings
- Held simultaneously at state office in Portland and regionally throughout the state
- 8 week rollout training schedule

# Local Clinic Staff Trainings

- Trained 2 weeks prior to agency go-live
- Trained using TWIST Training database
- Local staff went back to clinics and practiced in TWIST Practice database

Agency assigned to each Training Group	Staff #	Training Location	Training Dates	Training Week	Agency Conversion Date	Practice DB Agency
Benton + Linn	18	PSOB	8/27	8/24/15	9/14/15	Linn, Benton
Marion + Polk	28	Salem	1/5, 1/6	Week 1 1/4/16	1/19/16	Marion, Polk, Lake
<u>Salud</u> Medical Center	24	PSOB	1/5, 1/6			<u>Salud</u> , Harney
Lane + Coos	23	Eugene	1/12, 1/13	Week 2 1/11/16	1/25/16	Lane, Coos
Multnomah County	48	PSOB	1/12, 1/13, 1/14			Multnomah N, M, E, C
Make up Training		PSOB	1/21	Week 3 1/18/16 Holiday	2/1/16	Tillamook
Clackamas	17	PSOB	1/19, 1/20			Clackamas, CTU
Lincoln + Tillamook	9	Lincoln C.	1/20			Lincoln
Jackson + Josephine	23	Medford	1/26, 1/27	Week 4 1/25/16	2/8/16	Jackson, Josephine
Curry + Douglas	14	Roseburg	1/28			Douglas, Curry
Washington	29	PSOB	1/26, 1/27			Washington, Union, Wallowa
Deschutes	12	Bend	2/2, 2/3	Week 5 2/1/16	2/15/16	Deschutes
Crook	4	Bend	2/2, 2/3			Crook
CT Warm Springs + Jefferson	10	Madras	2/4			Jefferson
Clatsop + Columbia	10	PSOB	2/4			Clatsop
Make up training		PSOB	2/2			CTWS
Klamath + Lake	10	K Falls	2/10	Week 6 2/8/16	2/22/16	Klamath
Hood River + N. Central Health	10	PSOB	2/10			Hood River
Make up training		PSOB	2/17	Week 7 2/15/16 Holiday	2/29/16	Columbia
Harney + Malheur	11	Ontario	2/23			Malheur
Union + Wallowa + Baker	8	<u>LaGrande</u>	2/24	Week 8 2/22/16	3/7/16	Baker
Grant + CTU + UMHS	16	Pendleton	2/25, 2/26			UMHS, Grant
Make up training		PSOB	3/3			North Central
<b>Total</b>	<b>307</b>			8 weeks (w/o pilot)		

# Training High Level Flow

- Convert participants
- Issue card(s)
- Assign and Issue benefits
- Print Benefits List with aggregated family benefits
- PIN card(s) using IVR or web portal
- Shop using training stand beside POS device
- See how shopping is reflected in the family and participant records

## Detailed Training On:

- Card deactivations and replacements
- Modifying benefits
- Category changes
- Formula exchange/replacement
- Formula Warehouse orders
- Troubleshooting and what can be handled over the phone vs. in person

# Point of Sale Devices at Remote Sites

- Had 2 devices linked to Training database
- Both programmed for Ethernet + phone
- 1 with phone 9 + number
- 1 with phone direct dial
- Have a plan for shopping to occur if the device doesn't work at your remote site!

# Participant Resources

- Very helpful for local staff to become familiar with participant customer service resources
  - Toll-free customer service line
  - Web portal
  - WICShopper smart phone app
  - Store receipts

# Retail Vendor Trainings

- Invite local agency staff to attend
- Helpful for local staff to see eWIC in the stores
- Helpful for vendors to get their clinic process questions answered
- Great for relationship building

# Lessons Learned from Pilot Clinics

- Add 5-10 minutes per appointment during rollout
- Shorten number of appts/day by 2-3
- Consider cutting back on the number of classes during rollout
- Re-evaluate scheduling within first few weeks

# Info to Share with Participants

- WIC is first tender type
- Juice issues (48 vs. 64 oz group frozen options)
- Baby food (balance by oz not jars)
- Milk fat %
- How to report issues with shopping and benefit balance

Visit our website for resources:

[http://public.health.oregon.gov/HealthyPeopleFamilies/  
wic/Pages/index.aspx](http://public.health.oregon.gov/HealthyPeopleFamilies/wic/Pages/index.aspx)

(eWIC “showcase” in Portland, Oregon coming soon!)



WIC

- Find a WIC clinic or store
- Income guidelines
- WIC Food List
- Shopping with eWIC
- Annual report
- WIC regulations
- Publications
- WIC Farm Direct Nutrition Program

- For Oregon WIC Staff
- For WIC retailers
- For farmers
- For medical providers
- For community partners

Public Health > Healthy People and Families > WIC



# WIC



WIC is the Special Supplemental Nutrition Program for Women, Infants and Children. This public health program is designed to improve health outcomes and influence lifetime nutrition and health behaviors in targeted, at-risk populations. Nutrition education is the cornerstone of the WIC Program.

### More Information

- Pregnancy
- Breastfeeding Promotion
- Healthy Babies

### Contact Us

- Oregon WIC Program
- Report a complaint or fraud or abuse
- Share a compliment or feedback

### Wondering if you could be eligible for WIC?

Use this prescreening tool to find out.  
*This is not an application to WIC. You still need to visit your local WIC clinic to apply for WIC benefits.*



- Find a WIC clinic or authorized store near you
- WIC Income Guidelines
- WIC Food List

Are you looking for the online nutrition education classes for WIC participants?

Visit our online nutrition education page to get started



Thank you! 😊

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