Oregon eWIC Implementation
Lessons Learned
NWA Technology & Program Integrity Conference
September 19, 2013
Ohio WIC Program

- 40 state program staff
- 4 state MIS developers
- 36 local agencies
- 112,000 participants
- Fixed month benefit issuance
- 553 grocery and pharmacy vendors
- 664 FMNP farmers, 478 authorized for CVB also
Oregon eWIC Project

• Online
• Processor is J.P. Morgan
• Maximus is QC contractor + consulting services
• State-required QA contractor
• Pilot late January 2014
• Rollout May-July 2014
What Worked Well...
State Agency eWIC Workgroups

• Set up while our processor RFP was in the works
• Started with 17(!), scaled back to 12, then scaled back up as the project progressed:
  • APL
  • MIS
  • Testing
  • Vendor
  • Pilot Selection
  • Clinic Operations
  • Formula Warehouse
  • Training
  • Policy
  • Compliance
  • Shopper Ed
  • Communications
  • Marketing
  • Financial
  • Logistics
  • Evaluation
  • Emergency preparedness
eWIC Leadership Team

- Comprised of workgroup leads + program and project managers
- Meets 2x month and ad hoc as needed
- Developed a decision making process, guidelines, and recommendation form
- Workgroup leads bring recommendations to the group for approval
- Document decisions well!
Meetings, Meetings, & More Meetings

Weekly
- Project status meeting with processor, QC & QA
- Technical meeting with processor, QC & QA
- Status meeting with QC contractor
- Core internal staff meeting (PMs, manager, coordinator)
- Internal MIS team meeting (business + developers)
- Internal huddles with all WIC program staff

2x Month
- eWIC Leadership meeting
- eWIC Managers meeting
- Most project workgroups

Monthly
- State and processor Senior Executive meeting
- eWIC updates at WIC program all-staff meeting
Early & Often

• Communication
• Engagement
• Started before we had our processor on board
• Information sharing and input gathering at internal and partner meetings
  – WIC EBT 101
  – Oregon eWIC status and plans
  – JADs
• Monthly status reports to all parties
Early & Often – Vendors

• Assume they know nothing at first
• eWIC updates via:
  – Monthly Vendor Newsletter
  – Quarterly Vendor Advisory Council meeting
• Encourage Vendors to share eWIC information with their ECR distributors, TPPs, etc.
• Become comfortable deferring eWIC questions from Vendors to your processor Vendor Manager
Early & Often – Local Agency Staff

• Design/planning phase JAD sessions for:
  – MIS
  – Clinic operations and policies
  – Training
  – Materials

• Variety of communication methods
  – Coordinators’ meeting
  – Status Reports
  – Webinars, web postings

• Voted on card design – selected winner from 4 options
Early & Often – Local Agency Staff

• Informational webinars – live + recordings available on our website
  http://public.health.oregon.gov/HealthyPeopleFamilies/wic/Pages/ewic-webinars.aspx

• Clinic eWIC Readiness Toolkit (CeRT)
  http://public.health.oregon.gov/HealthyPeopleFamilies/wic/Pages/ewic-toolkit.aspx
Early & Often – Evaluation

• Don’t take a top down approach
• Evaluation Team lead met with workgroups
• Gathered input on what the groups would like to evaluate (during pilot, rollout, and beyond)
• Created a spreadsheet for workgroups to add more items as necessary
• Had multiple discussions with QC contractor to clarify roles and FNS evaluation vs. Oregon WIC evaluation items
What We’ve Learned...
Early & Often Doesn’t Always Apply

• Before making major decisions:
  – Wait for your processor and QC/QA contractor(s) to be in place
  – Utilize their expertise

• Follow the timeline on your project plan
  – Get all parties to agree on baseline dates
  – Be careful about doing things out of order
  – Pay close attention to dependencies
Project Management

• Designate a full time, overall Project Manager at your State WIC Program

• Oregon WIC has:
  – Technology Project Manager
  – Business Project Manager
  – Business Manager
  – While having all 3 was good, one should have been designated the overall Project Manager
Clearly Define Roles & Responsibilities

- Program Managers
- Project Managers
- QC/QA
- Workgroups – purpose, scope, etc.
- SMEs
- Testers
- Document well and revisit often!
Agile vs. Waterfall Development

• Make sure it’s clear in your contract with your eWIC processor
• Make sure it’s clearly defined in the project work plan
• If MIS development is needed:
  – Coordination of development methods is critical, especially for testing
  – A Technology Project Manager is essential
“Sandbox” Test Environment

Sandbox Down = No Testing
“Sandbox” Test Environment

Sandbox Down = No Testing

Sandbox Down = Limited Development
“Sandbox” Test Environment

Sandbox Down = No Testing

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Sandbox Frequently Down = Delayed Pilot
Test Environment Tips

• Try to avoid a shared test environment
• Put test environment availability expectations in your contract (24/7, 7 am-10 pm, etc.)
• Try to put downtime penalties in your contract
• Ask for a test environment risk mitigation plan
• Monitor downtime closely
• Engage senior executives early on if there are issues
MIS Conversion from Paper to eWIC

Start planning for this as early as possible!

• Converting existing participants and families
• Running two systems simultaneously
• Transfers during pilot and rollout
  – From an eWIC agency to a paper agency
  – We decided not to convert clients back to paper – will turn on all integrated chain stores at pilot start
• Caseload monitoring
• Settlement and reconciliation
Be Flexible 😊

- Plans and decisions made during planning, RFP/contract writing, etc. may not be reasonable during implementation.
- Information from JADs with local agencies could alter plans.
- Timelines and functionality may need to change as you move through implementation.
- Pick your battles.
- Balance collaboration with forward progress.
Questions?

Kim Word
Oregon eWIC Business Project Manager
971-673-0069
kimberly.m.word@state.or.us