Stakeholders Speak

Lessons Learned from EBT Implementation

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Overview

• Describe Two Approaches to Gathering Lessons Learned
  • Wisconsin
  • Oregon

• Challenges that Continue in Operations

• FNS Perspective

• Closing Thoughts

• Opportunity for Questions/Answers

Focus on Key Areas:
• Project Management
• Education
• Program Integrity
• Vendor Management
• Technology
# Approach to Gathering Lessons Learned – Part 1

<table>
<thead>
<tr>
<th></th>
<th>Wisconsin</th>
<th>Oregon</th>
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</thead>
<tbody>
<tr>
<td><strong>How</strong></td>
<td>Online Survey</td>
<td>Telephone Interviews</td>
</tr>
<tr>
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<td>Online Survey</td>
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<tr>
<td><strong>Who</strong></td>
<td>State Staff, Clinic Staff, &amp; WIC Vendors</td>
<td>WIC Vendors</td>
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<tr>
<td></td>
<td></td>
<td>WIC Clinic Staff</td>
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<tr>
<td><strong>When</strong></td>
<td>9 months post implementation</td>
<td>End of Pilot</td>
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<td>3 months post Rollout</td>
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<tr>
<td><strong>Why</strong></td>
<td>Identify changes on approach to general management practices</td>
<td>Identify changes to make during rollout</td>
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<td>Identify changes for future projects</td>
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# Approach to Gathering Lessons Learned – Part 2

<table>
<thead>
<tr>
<th>How</th>
<th>Wisconsin</th>
<th>Oregon</th>
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</thead>
<tbody>
<tr>
<td></td>
<td>Phone interview, Meetings</td>
<td>In person interviews, Collaborative Session</td>
</tr>
<tr>
<td>Who</td>
<td>State Staff, Clinic Staff</td>
<td>State Staff</td>
</tr>
<tr>
<td>When</td>
<td>9 months post implementation</td>
<td>1 month post implementation</td>
</tr>
<tr>
<td>Why</td>
<td>Gained more detailed information</td>
<td>Identify changes for future projects</td>
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Wisconsin

By the Numbers

- 105K Households
- 1,190 Retailers
  - 805 Integrated
  - 385 Stand-Beside
- 2 Pilot areas
- 15 Rollout Areas

Notable Characteristics:
- Modified existing MIS (work began before EBT Contractor on board)

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Pilot | Feb. – May 2015 | 3 mo.
Rollout | June 2– Sept. 2015 | 4 mo.
By the Numbers

- 70,000 Households
- Vendors:
  - 490 Integrated
  - 56 Stand-Beside
- 7 rollout phases

Notable Characteristics:
- Modified existing MIS (work began before final EBT Contractor on board)
- Restarted implementation with new EBT Contractor
- Designed in their implementation:
  - Allow issuance of two cards per household
  - Formula Warehouse
  - Card Issuance by Mail

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<tbody>
<tr>
<td>UAT &amp; Pilot Preparation</td>
<td>July – Sept. 2015</td>
<td>3 mo.</td>
</tr>
<tr>
<td>Rollout</td>
<td>Jan – Mar. 2016</td>
<td>3 mo.</td>
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</tbody>
</table>
Wisconsin

DISCREET

READABLE

SUPPORT

Do not write your PIN on this card. Keep this card for future WIC benefits.

For your account balance, go to www.ebtedge.com or call 1-877-231-3452. For problems with your card, call your WIC Office.

If found, please return to WIC.
PO Box 2659 • Madison, WI 53701-2659
This institution is an equal opportunity provider.
Project Management

- eWIC Steering Committee
- USDA FNS
- MIS Contractor (Ciber)
- QA Contractor (MAXIMUIS)
- eWIC Contractor (FIS)
- Local (“Agency”) Project Advisory Group
- Vendor Advisory Group
- Training Team

Be Kind/Patient

Be Engaged/Participate

Work & Update the Schedule
Education

**Clinic Staff**
- MIS
- Policy Changes
- Train the Trainer
- Education Buys

**Clinic Procedures**
- Messaging
- Wi-Fi
- Portable Printers
- Clinic Flow

**Participants**
- Reteach the Food List
- “Can’t get it now”
- What to do if they have a problem
- Keep receipts*

**State Staff**
- MIS
- Testing
- Vendor Trainings
- Master Training Schedule

*Phone App made available after implementation
Program Integrity

- Fraud seemed to increase with EBT.
- Frozen/Canned Fruits & Vegetables mapped to Generic PLUs.
- Not-to-Exceed (NTEs) display on Stand Beside Point of Sale Device Receipts.
- UPCs improve WIC Audits.
- Fraud seemed to increase with EBT.
Vendor Management

Management
- Vendor WIC Contract Addendum
- Moratorium

Communication
- Major Corps./Chains
- Third Party Processors (TPP)
- Value Added Resellers (VAR)
- Training (all stores)

Validation
- Inexperienced VARs and their stores
- Level 3 Certifications, Live Shopping

Moratorium: an authorized period of delay or temporary suspension in the performance of an obligation
Technology

Invest and Prepare for:

- UPC Collection
- Technical Glitches Training/Testing
- APL Updates
Oregon
# Project Management

<table>
<thead>
<tr>
<th>What Worked Well</th>
<th>Improvements for Next Big Project</th>
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<tbody>
<tr>
<td>Had both Technical and Business Project Managers</td>
<td>• Better clarity on roles and responsibilities of each</td>
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<tr>
<td></td>
<td>• Better coordination between technology project manager and development manager</td>
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<td>Created Cross-Team project workgroups</td>
<td>• Try to limit the number of workgroups</td>
</tr>
<tr>
<td></td>
<td>• Make use of existing program teams</td>
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<tr>
<td></td>
<td>• Better clarity on purpose and scope of each</td>
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<tr>
<td>Project Leadership Team of workgroup Leads + Managers</td>
<td>• Meeting 2x per month was too often for some</td>
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<td></td>
<td>• Send agendas well in advance and allow opt- out if agenda isn’t relevant to all workgroups</td>
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Project Management

- Developed decision-making criteria and process for Leadership Team
- Weekly Project Status Meetings
- Frequent communication and transparency with all stakeholders
Education

For Clinic Staff:

- Webinars
- Clinic eWIC Readiness Toolkit (CeRT)
- Monthly Technical Assistance Conference Calls
- Face-to-face training on MIS changes, policy updates, etc. for all staff
Lessons Learned from Clinics

During go-live:

• Add 5-10 minutes per appointment
• Schedule fewer appointments/day
• Cut back on number of classes

• Explaining the new process to everyone can be exhausting for staff
• Expect surprises!
Lessons Learned from Clinics

• **Send Local Agency staff out shopping!**
  - **State issued compliance/test cards**
    - 1-6 per agency depending on size/# of locations
    - Benefits: non-perishable foods
  - **Local Agencies donated foods to local food banks**
  - **Next up – state staff shopping 😊**
Program Integrity

“They wouldn’t let me get ____.
I have always gotten that.”

“They said I went over
the dollar amount for WIC.”

“The cashier didn’t know
what they were doing....”

“I had to pay for it myself!”
Program Integrity – High Risk

- **Transition** until adequate volume of eWIC data
- **Redemption Amount.** High mean, low variance
- **Foods.** Category volume/mix

- **Transaction.** Manual card number entry, time of day
- **System.** Integrated vs. Stand Beside POS Devices
Program Integrity – Investigations

- Allow time to transition compliance activities
- Use realistic account balances
- Faster investigation set-up & completion time
- Few substitutions, explore mixed basket buys
- Inventory audit accuracy
Vendor Management – Lessons from Rollout

• Test as many stores as possible

• Be flexible with your test schedule

• Test over the phone

• ‘Moratorium’
  (‘Vendor Readiness’)  
  9 months wasn’t long enough, 12 would have been better
Vendor Management – Lessons from Training

- In-store training
- APL process
- Produce mapping
- Mid-transaction receipt
- Customer service
Technology

- IVR, web portal, 24/7 live customer service with language line
- Multiple databases for MIS development and testing
- MIS load/performance testing highly recommended
Technology – WICShopper App

- Over 50,000 families have registered their cards
- Used in 125,000 shopping trips per month
- Great for notices like Farmers Market, recalls, food list updates
Technology – WICShopper App

New feature

• Way for shoppers to submit product info, UPC and image

• Helps keep our APL up to date
FNS Perspective

Communication is Key!

- Learn federal requirements and when FNS approvals or reviews are needed.
- Discuss concerns of the project or changes in anticipated costs or schedule early.
- Communicate where help is needed.

Maintain Regular Communication with Your Regional FNS Office
Closing Thoughts

• **You Don’t Have to Reinvent the Wheel** – Other States may have a solution or a tool you can use

• **You Don’t Have to Do it Alone** – Contractors can perform some tasks like: live shopping, reporting to FNS, UPC collection, transition

• **Set Aside Time to Think About Transition*** – define new processes/responsibilities related to tasks like manual adjustments, production test transactions that are not voided, system certifications / POS system upgrades, vendor/cashier training

*Looking to the future, there may be a need for FNS guidance/support on dealing with challenges in Operations
### Online Resources*

<table>
<thead>
<tr>
<th>Resource</th>
<th>Weblink</th>
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<tbody>
<tr>
<td><strong>OR eWIC Showcase.</strong> A webpage with lots of presentations and materials</td>
<td><a href="http://www.oregon.gov/oha/ph/HealthyPeopleFamilies/wic/Pages/ewic.aspx">http://www.oregon.gov/oha/ph/HealthyPeopleFamilies/wic/Pages/ewic.aspx</a></td>
</tr>
<tr>
<td><strong>WI Shopping for WIC Foods Presentation.</strong> Describes shopping with EBT Card</td>
<td><a href="https://connect.wisconsin.gov/dhsshoppingforwicfoodsboth/">https://connect.wisconsin.gov/dhsshoppingforwicfoodsboth/</a></td>
</tr>
<tr>
<td><strong>WI Vendor Applicants.</strong> Information provided to retailers about cash register systems</td>
<td><a href="https://www.dhs.wisconsin.gov/wic/vendor/cash-register.htm">https://www.dhs.wisconsin.gov/wic/vendor/cash-register.htm</a></td>
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*For additional information and resources, feel free to contact us

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