iPhone Technology: Monitoring Visits – A Different Solution (2015)
A Paperless Approach – iPhone Monitoring
Virginia WIC Program

- Converted to eWIC transaction processing (2014)
- Service 150,000 eligible participants
- 35 Health Districts/175 clinic locations
- 850 authorized stores
- 700-800 Monitoring Visits/per year
- $7 million food benefits (monthly)
Why Do Store Monitoring Reviews?

- Compliance w/ Federal & State Guidance
  - Check Minimum Stocking Requirement (MSR)
  - Check for other Program violations

- Who Benefits?
  - Participants/Cardholders
  - New Store Applicants and Authorized Stores
  - Local Agency Staff
  - State WIC Office
## Virginia WIC Program (Monitoring Review Form)

### Store Information
- **Store Name:** FUN-MART #1802
- **Address:** 111 COMMONWEALTH DRIVE
- **City:** HORTON
- **Telephone:** (876) 971-71
- **Most Recent RSMS Price Survey Date:** 01/24/2013
- **WIC ID/Applicant:** 9000
- **Zip Code:** 24280
- **State/VA:**
- **Store Peer Group:** 53
- **Cash Registers:** 55

### Reviewer's Information
- **Reviewer's Name:** EDD JACK
- **Reviewer's Title:** VENDOR LIAISON
- **Telephone:** (804) 864-7813
- **E-Mail:** edd.jack@vdh.virginia.gov

### Visit Information
- **Type of Visit:** 30 Stocking Visit

### Observation/Results
- **WIC Decal Posted:** Yes
- **Vendor Manual Complete:** Yes

### Stocking Assessment

<table>
<thead>
<tr>
<th>Food Category</th>
<th>Food Description</th>
<th>Size/Minimum Required</th>
<th>Designated Shelf Label Posted</th>
<th>Minimum Stocked</th>
<th>Store Brand Declaration</th>
<th>Package Size</th>
<th>RSMS Price</th>
<th>Shelf Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>Baby Food, Infant Cereal, and Special Formulas</td>
<td>Baby Food Fruits and Vegetables (Any Brand)</td>
<td>64 (4 oz.) containers</td>
<td>N/A</td>
<td>Yes</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.03</td>
<td>$0.33</td>
</tr>
<tr>
<td></td>
<td>Gerber Infant Rice Cereal, Dry</td>
<td>3 (6 oz.) boxes</td>
<td>N/A</td>
<td>Yes</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.36</td>
<td>$1.96</td>
</tr>
<tr>
<td>Contract Formulas</td>
<td>Similac Advance Earlyshield Concentrate</td>
<td>34 (13 oz.) cans</td>
<td>N/A</td>
<td>Yes</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.36</td>
<td>$1.78</td>
</tr>
<tr>
<td></td>
<td>Similac Advance Earlyshield Powder</td>
<td>6 (12 oz.) cans</td>
<td>N/A</td>
<td>Yes</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.36</td>
<td>$1.78</td>
</tr>
<tr>
<td></td>
<td>Similac Sensitive Concentrate</td>
<td>34 (13 oz.) cans</td>
<td>N/A</td>
<td>Yes</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.36</td>
<td>$1.78</td>
</tr>
<tr>
<td></td>
<td>Similac Sensitive Powdered</td>
<td>6 (12 oz.) cans</td>
<td>N/A</td>
<td>Yes</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.36</td>
<td>$1.78</td>
</tr>
<tr>
<td>Dairy</td>
<td>Eggs, Fresh, Large</td>
<td>2 (1 dozen) cartons</td>
<td>N/A</td>
<td>Yes</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.36</td>
<td>$1.78</td>
</tr>
<tr>
<td></td>
<td>Milk - Liquid Skim, 1%, 2%</td>
<td>5 (1 gallon containers)</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>GREAT VALUE</td>
<td>$0.32</td>
<td>$3.22</td>
</tr>
<tr>
<td></td>
<td>Milk - Liquid Skim, 1%, 2%</td>
<td>3 (1 quart containers)</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>MAYFIELD</td>
<td>$0.28</td>
<td>$2.18</td>
</tr>
<tr>
<td></td>
<td>Milk - Liquid Whole</td>
<td>2 (1 gallon containers)</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>GREAT VALUE</td>
<td>$0.32</td>
<td>$3.22</td>
</tr>
<tr>
<td></td>
<td>Milk - Liquid Whole</td>
<td>1 (1 quart container)</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>MAYFIELD</td>
<td>$0.28</td>
<td>$2.18</td>
</tr>
<tr>
<td></td>
<td>Regular American Cheese (Sliced)</td>
<td>1 pound</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>GREAT VALUE</td>
<td>$0.40</td>
<td>$4.00</td>
</tr>
<tr>
<td></td>
<td>Regular Cheddar Cheese (Blocked)</td>
<td>1 pound</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
<td>GREAT VALUE</td>
<td>$0.48</td>
<td>$4.80</td>
</tr>
</tbody>
</table>
Why Automate the Review Process?

- Eliminate paper forms
- Leverage UPC database
- Reduce Administrative Costs
- Reduce mistakes
- Reduce re-visits
- Greater Accountability
- Keep pace with technology
- Streamline workflow
- Link results to Crossroads
Costs and Paper forms

- Handling
  - Organizing
  - Storing
    - Distributing
    - Mailing
    - Copying
  - Reviewing
- Scanning
- Destroying
# VIRGINIA WIC PROGRAM (MONITORING REVIEW FORM)

**Store Information**

- **Store Name:** FUN-MART #1802
- **Address:** 111 COMMONWEALTH DRIVE, HORTON
- **City:** HORTON
- **Telephone:** (876) 97-171
- **Most Recent RSMS Price Survey Date:** 01/24/2013
- **State:** VA
- **Zip Code:** 24280

**Reviewer's Information**

- **State Agency:** VIRGINIA WIC PROGRAM
- **Reviewer:** EDD JACK
- **Name:** VENDOR LIAISON
- **Telephone:** (804) 864-7813
- **E-Mail:** edd.jack@vdh.virginia.gov

## Visit Information

- **Date of Review:**
- **Type of Visit:** 30 STOCKING VISIT

## Observation/Results

- **WIC Decal Posted:** ☐ Yes ☐ No
- **Vendor Manual Complete:** ☐ Yes ☐ No

## Stocking Assessment

<table>
<thead>
<tr>
<th>Food Category</th>
<th>Food Description</th>
<th>Size/Minimum Required</th>
<th>Designated Shelf Label Posted</th>
<th>Minimum Stocked</th>
<th>Store Brand Declaration</th>
<th>Package Size</th>
<th>RSMS Price</th>
<th>Shelf Price</th>
</tr>
</thead>
<tbody>
<tr>
<td>BABY FOOD, INFANT CEREAL AND SPECIAL FORMULAS</td>
<td>BABY FOOD FRUITS AND VEGETABLES (ANY BRAND)</td>
<td>64 (4 oz) Containers/Jars must stock 2 types. single ingredient fruits &amp; vegetables.</td>
<td>N/A</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.03</td>
<td>$</td>
</tr>
<tr>
<td>GERBER INFANT RICE CEREAL DRY</td>
<td>3 (6 oz) Boxes</td>
<td>N/A</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.06</td>
<td>$</td>
</tr>
<tr>
<td>CONTRACT FORMULAS</td>
<td>SIMILAC ADVANCE EARLYSHIELD CONCENTRATE</td>
<td>34 (13 oz) Cans</td>
<td>N/A</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.15</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>SIMILAC ADVANCE EARLYSHIELD POWDER</td>
<td>9 (12 oz) Cans</td>
<td>N/A</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.15</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>SIMILAC SENSITIVE CONCENTRATE</td>
<td>34 (13 oz) Cans</td>
<td>N/A</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.15</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>SIMILAC SENSITIVE POWDERED</td>
<td>9 (12.6 oz) cans</td>
<td>N/A</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.15</td>
<td>$</td>
</tr>
<tr>
<td>DAIRY</td>
<td>EGGS, FRESH, LARGE</td>
<td>2 (1 dozen) Cartons</td>
<td>N/A</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>N/A</td>
<td>N/A</td>
<td>$0.01</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>MILK - LIQUID SKIM, 1%, 2%</td>
<td>3 (1 Gallon Containers)</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>GREAT VALU</td>
<td>N/A</td>
<td>$0.32</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>MILK - LIQUID WHOLE</td>
<td>2 (1 Gallon Containers)</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>GREAT VALU</td>
<td>N/A</td>
<td>$0.35</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>MILK - LIQUID WHOLE</td>
<td>1 Quart Container</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>GREAT VALU</td>
<td>N/A</td>
<td>$0.32</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>REGULAR AMERICAN CHEESE (Sliced)</td>
<td>1 Pound</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>GREAT VALUE</td>
<td>N/A</td>
<td>$0.40</td>
<td>$</td>
</tr>
<tr>
<td></td>
<td>REGULAR CHEDDAR CHEESE (BLOCKED)</td>
<td>1 Pound</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>☐ Yes ☐ No ☐ N/A</td>
<td>GREAT VALUE</td>
<td>N/A</td>
<td>$0.48</td>
<td>$</td>
</tr>
</tbody>
</table>
What is Checked?

- Stores has Minimum Stocking Requirement?
  - Baby Foods, Breakfast Cereals, Cheese, Eggs, Fruits and Vegetables, Formulas, Infant Cereal, Legumes Milk, Juices, Whole Grain Products

Other Items
- WIC Shelf labels posted?
- Prices Posted?
- Expired Foods and Refrigeration?
- Required materials on site?
- Confirm # of cash register?
- Prices collected for new store applicants.
Who Is Reviewed?

• **Types of Stores**
  • **Applicant** – Not yet approved for eWIC
  • ** Authorized** – Approved to process eWIC
    ❖ **High-Risk** – Authorized, but has had issues
    ❖ **Probationary** – First year of authorization

• **Type of Review**
  • **Stocking Visit** – for Applicant Stores (MSR only)
  • **Monitoring Review** – for all other stores
Who Conducts Monitoring Visits?

• Trained Local Agency Staff
• State WIC Agency Staff
• Outside Contractor
  (during non standard hours)
Preparing for the Review

• What stores do I need to visit?
• What stores visits have top priority?
• Where are the stores located?
• Previous monitoring results were?
• What order should I visit the stores?
• How do I get there?
• What do I need to bring with me?
Key Information Tools

- Store Last Mon. Visit Report *(Monthly)*
- www.drivingrouteplanner.com
- $Links.docx – these and other resources
After the Review

- iPhone is a shared resource
- Check APL Central for next action
- Schedule Revisit
  - PASS = no revisit required *
  - FAIL = revisit 30-60 days *
  - INCOMPLETE = revisit within 30 days *
  - OTHER = see APL Central *

*Check APL Central for next steps
Receive feedback about Quality
After the Review

- APL Central
  - CURRENTLY use Firefox or Chrome

- https://www.aplcentral.com/VA/login

- In Visit Screen, “Search”
  - STATUS = Completed or Finalized
  - RESULT = Blank or Pass/Fail/Incomplete/Other
Approach

• Operational Adjustment Grant
• High-level requirements
  • “GPS” for Monitors
  • UPC Scanning
  • Configurable Review Elements
  • Active Connection NOT required
  • Allow manual override
  • Checkboxes & pre-populated data
  • Collect signatures
  • Single location for all monitoring visits.
Minimum Stocking Requirements (MSR)

- Reflects the **Current** MSR
- Dynamic – change to reflect future requirements.
- Flexibility – create new forms – business requirements
- MSR description is displayed on iPhone
- Product eligibility: UPCs in APL
- Retailer Agreement: MSR met whenever store is open

* You’ve got to scan it to believe it!
Misc. Administrative Issues

• Shared Resource
• Establish guidelines on how the iphone should be used.
• What “apps” can be downloaded onto the iPhone?
• Who is responsible if the device is lost?
• iPhones included in the equipment inventory
• Future enhancement: Use Bluetooth UPC Scanner
The Big Picture - Functional Diagram

Crossroads

APL Central

iPhone w/ APL App

• Retail Store’s data
• Results of Monitoring Reviews
• (Final Monitoring Reviews)

• Retail Store’s data
• APL (UPCs of approved products)
• Final Monitoring Reviews
• Monitoring Review Record
• Submitted Monitoring Reviews

• Retail Store’s data
• APL (UPCs of approved products)
• Monitoring Review Record
• Submitted Monitoring Reviews
• In Process Monitoring Reviews

3G/WiFi
Future Enhancements

☑ OA Grant Secured FFY 2015
☑ Complete the automation cycle
☑ Monitoring results electronically updated into Crossroad (MIS)
☑ Eliminate dual entry of UPCs (Crossroads and APL Central
☑ Allow more targeted access to monitoring review results, i.e., corporate name, health district, reviewer.
☑ Allow more options to correct selection errors.
QUESTIONS
Thank you!

Sheila Brewer
Vendor Compliance Manager
Virginia Department of Health
109 Governor Street, 9th floor
Richmond, VA 23219
Sheila.Brewer@vdh.virginia.gov
804-864-7810   Fax: 804-864-7854
Backup Slides
<table>
<thead>
<tr>
<th>Vendor Name</th>
<th>Location</th>
</tr>
</thead>
<tbody>
<tr>
<td>A.R. WATTS &amp; SONS</td>
<td>MILLERS TAVERN, VA 23115</td>
</tr>
<tr>
<td>AMERICANA GROCERY ROUTE 1</td>
<td>WOODBRIDGE, VA 22191</td>
</tr>
<tr>
<td>ARARAT GROCERY</td>
<td>ARARAT, VA 24053</td>
</tr>
<tr>
<td>BE-LO #37 (CAMELLIA)</td>
<td>NORFOLK, VA 23502</td>
</tr>
</tbody>
</table>
Name: TEST STORE 1
Address: 91 91ST STREET
         ALEXANDRIA, VA 22314
County: City of Alexandria
Peer Group: 10 - Commissary
WIC Vendor #: 0091
Status: Authorized
Corp Info: 0091
TEST STORE 1

91 91ST STREET
ALEXANDRIA, VA 22314

City of Alexandria

10 - Commissary

Monitoring Review Form (v.9)

Start a new Vendor Visit for this vendor, TEST STORE 1?

Start Visit

Cancel
Monitoring Review Form (v.9)

Vendor: TEST STORE 1

Started: Today, 2:00:01 PM

Minimum Stock

- Categories: Incomplete
- Status: Never submitted

Form Information

- Monitoring Visit

Photos: 0
<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Food Cat</td>
<td>Whole Grain (Brown Rice)</td>
</tr>
<tr>
<td>UPC/PLU</td>
<td>0725439110310</td>
</tr>
<tr>
<td>Item Quantity</td>
<td>99</td>
</tr>
<tr>
<td>Unit Price</td>
<td>(Optional)</td>
</tr>
<tr>
<td>Total Price</td>
<td>--</td>
</tr>
</tbody>
</table>

NOTE: Unit Price will be assigned to all other entries containing this UPC/PLU.
Fruits and Vegetables

* Fruits and Vegetables (Fresh, Canned, Frozen)

Whole Grains

* Whole Grain (100% Whole Wheat Bread)

Whole Grain (Brown Rice)
WHOLE GRAIN (BROWN RICE); REQ: ONE 16 OZ PACKAGE OF BROWN RICE

<table>
<thead>
<tr>
<th>My Essentials Long Grain Natural… 0725439110310 Qty: 1</th>
</tr>
</thead>
</table>

1 item
Tap '+' or scan the item to add.

<table>
<thead>
<tr>
<th>Prices Are Posted</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
</tr>
</thead>
<tbody>
<tr>
<td>Optional shelf labels, if used, are used consistently</td>
<td>Yes</td>
<td>No</td>
<td>N/A</td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Minimum Stocked</th>
<th>Yes</th>
<th>No</th>
<th>N/A</th>
</tr>
</thead>
</table>
### Monitoring Visit

<table>
<thead>
<tr>
<th>Field</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Number of eWIC Registers</td>
<td>0</td>
</tr>
<tr>
<td>Type of Visit</td>
<td>(select...)</td>
</tr>
<tr>
<td>Store does not display eWIC decal at the main door/window.</td>
<td>Yes</td>
</tr>
<tr>
<td>Store does not have a Retailer (Vendor) Manual on-site.</td>
<td>Yes</td>
</tr>
<tr>
<td>Store does not have WIC Approved Food List (English) in its WIC Retailer Binder.</td>
<td>Yes</td>
</tr>
</tbody>
</table>
Vendor Signature

Sign Here With Finger

George Grocer

06/11/2014
Visit Details

E-mail: george@xxx.com

Phone: 777-777-7777

Comments: Thank you

Signature: (Captured)

Reviewer ID & Signature

Name: Allan Astley

Comments: U r welcome

Signature: (Captured)

This visit is completed and cannot be edited.