

# 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

	Wisconsin	Oregon	
<b>How</b>	Online Survey	Telephone Interviews	Online Survey
<b>Who</b>	State Staff, Clinic Staff, & WIC Vendors	WIC Vendors	WIC Clinic Staff
<b>When</b>	9 months post implementation	End of Pilot	3 months post Rollout
<b>Why</b>	Identify changes on approach to general management practices	Identify changes to make during rollout	Identify changes for future projects



# Approach to Gathering Lessons Learned – Part 2



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

# 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)

Planning, Design,  
Development

Aug.– Nov. 2014

5 mo.

UAT & Pilot  
Preparation

Dec. – Jan. 2015

2 mo.

Pilot

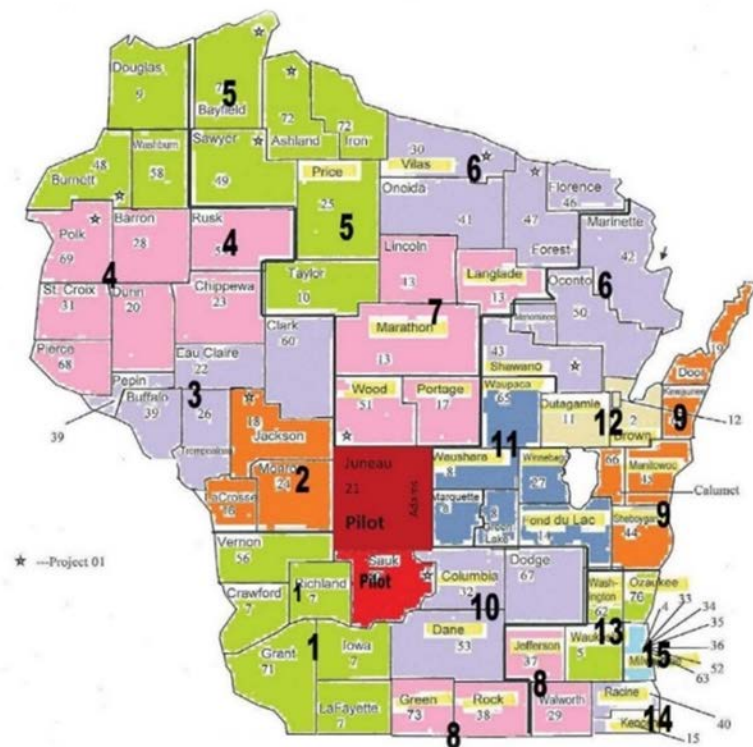
Feb. – May 2015

3 mo.

Rollout

June 2– Sept. 2015

4 mo.



# Oregon

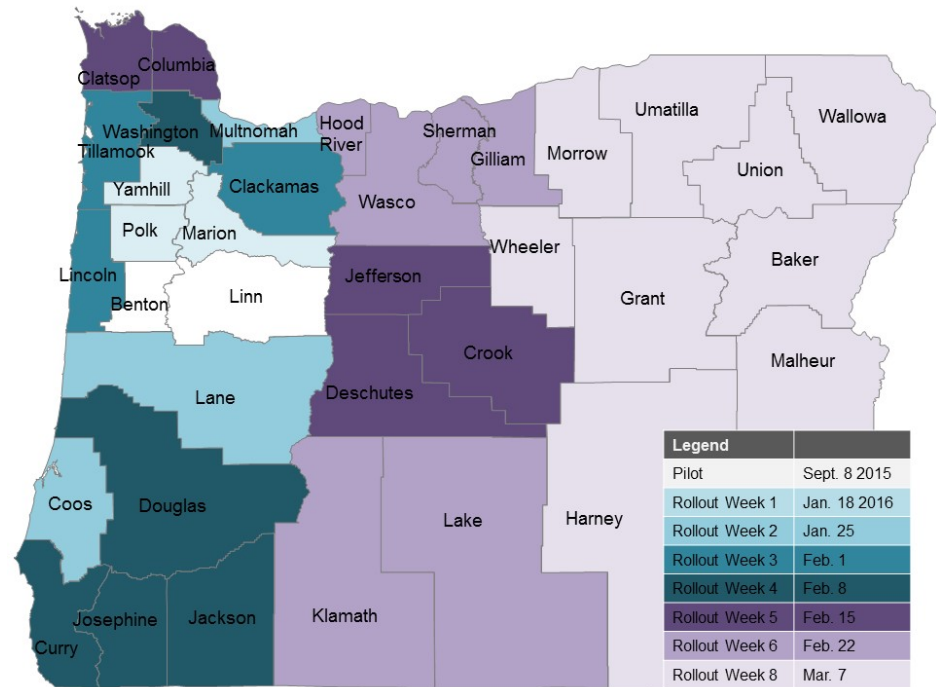
## By the Numbers

- 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

Planning, Design, Development	Aug 2014 – July 2015	12 mo.
UAT & Pilot Preparation	July – Sept. 2015	3 mo.
Pilot	Sept – Dec. 2015	3 mo.
Rollout	Jan – Mar. 2016	3 mo.



# Wisconsin

DISCREET

READABLE

SUPPORT



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For problems with your card, call your WIC Office.

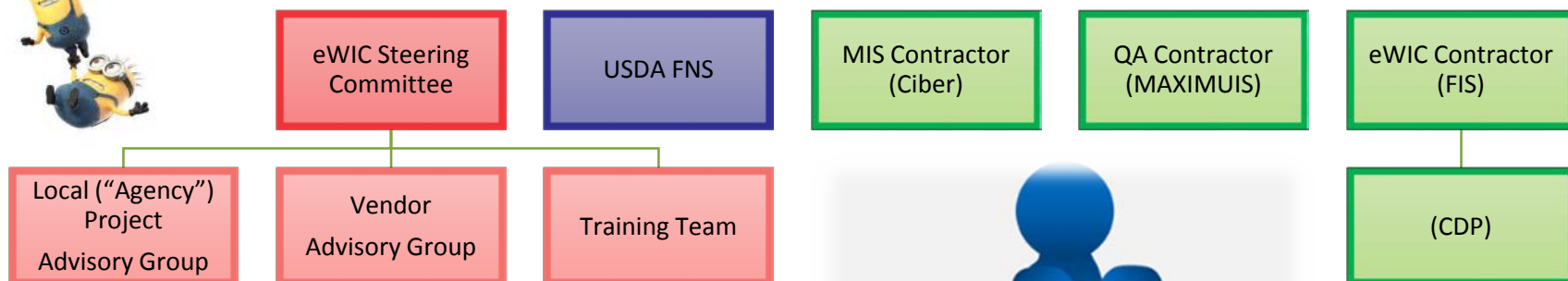
If found, please return to: WIC  
PO Box 2659 • Madison, WI 53701-2659

This institution is an equal opportunity provider.

WISCONSIN  
**WIC**  
HERE FOR YOU



# Project Management



Be Kind/Patient

Be Engaged/Participate

Work & Update the Schedule





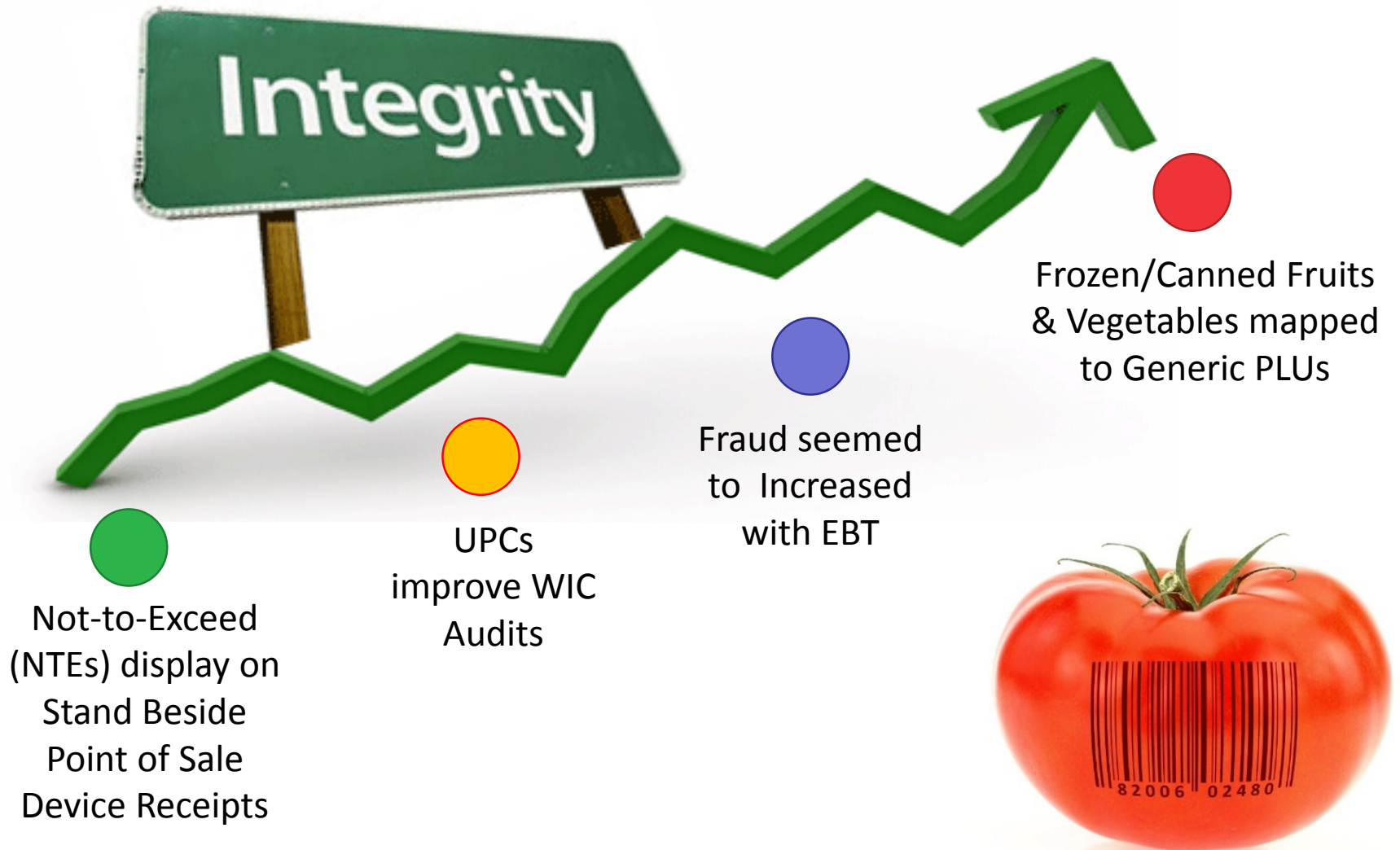
# Education

Clinic Staff	Clinic Procedures	Participants	State Staff
<ul style="list-style-type: none"><li>• MIS</li><li>• Policy Changes</li><li>• Train the Trainer</li><li>• Education Buys</li></ul>	<ul style="list-style-type: none"><li>• Messaging</li><li>• Wi-Fi</li><li>• Portable Printers</li><li>• Clinic Flow</li></ul>	<ul style="list-style-type: none"><li>• Reteach the Food List</li><li>• “Can’t get it now”</li><li>• What to do if they have a problem</li><li>• Keep receipts*</li></ul>	<ul style="list-style-type: none"><li>• MIS</li><li>• Testing</li><li>• Vendor Trainings</li><li>• Master Training Schedule</li></ul>

\*Phone App made available after implementation



# Program Integrity



# 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

A green arrow pointing to the right, with a darker green triangular tail on the left and a darker green triangular head on the right.

Technical Glitches Training/Testing

A yellow arrow pointing to the right, with a red triangular tail on the left and a red triangular head on the right.

APL Updates

A blue arrow pointing to the right, with a dark blue triangular tail on the left and a dark blue triangular head on the right.



**DO NOT WRITE PIN NUMBER ON CARD**

**For Customer Service  
www.ebtedge.com  
1-844-234-4946 (toll-free)**

If found please send to:  
Oregon WIC Program, P.O. Box 14450, Portland, OR 97293-0450

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# Oregon





# Project Management

What Worked Well	Improvements for Next Big Project
<b>Had both Technical and Business Project Managers</b>	<ul style="list-style-type: none"><li>• Better clarity on roles and responsibilities of each</li><li>• Better coordination between technology project manager and development manager</li></ul>
<b>Created Cross-Team project workgroups</b>	<ul style="list-style-type: none"><li>• Try to limit the number of workgroups</li><li>• Make use of existing program teams</li><li>• Better clarity on purpose and scope of each</li></ul>
<b>Project Leadership Team of workgroup Leads + Managers</b>	<ul style="list-style-type: none"><li>• Meeting 2x per month was too often for some</li><li>• Send agendas well in advance and allow opt- out if agenda isn't relevant to all workgroups</li></ul>

# 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

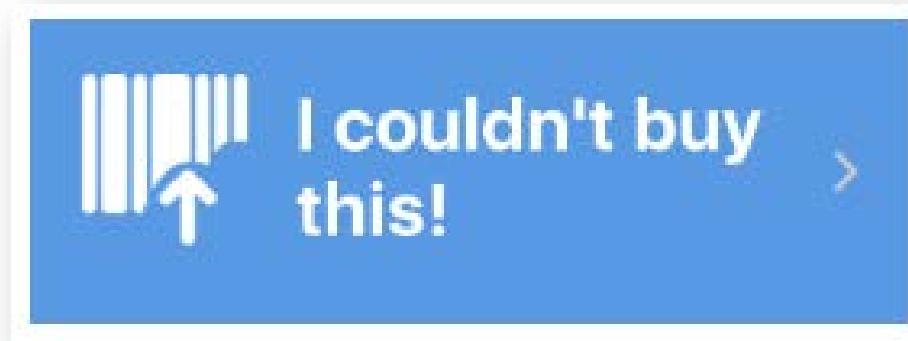
- IVR, web portal, 24/7 live customer service with language line
- Multiple databases for MIS development and testing
- MIS load/performance testing highly recommended

# 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

Maintain Regular  
Communication with Your  
Regional FNS Office



*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.



# 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

# Any Questions?

Online Resources*	Weblink
<b>OR eWIC Showcase.</b> A webpage with lots of presentations and materials	<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>
<b>WI Shopping for WIC Foods Presentation.</b> Describes shopping with EBT Card	<a href="https://connect.wisconsin.gov/dhsshoppingforwicfoodsboth/">https://connect.wisconsin.gov/dhsshoppingforwicfoodsboth/</a>
<b>WI Vendor Applicants.</b> Information provided to retailers about cash register systems	<a href="https://www.dhs.wisconsin.gov/wic/vendor/cash-register.htm">https://www.dhs.wisconsin.gov/wic/vendor/cash-register.htm</a>

\*For additional information and resources, feel free to contact us

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