



oregon  
**WIC**  
program



## Oregon eWIC Implementation Lessons Learned

NWA Technology & Program Integrity Conference  
September 19, 2013

# Oregon 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

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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](mailto:kimberly.m.word@state.or.us)