

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			Reviewer's Information		
Store Name: FUN-MART #1802	WIC ID/Applicant:9000		State Agency:	VIRGINIA WIC PROGRAM	
Address: 111 COMMONWEALTH DRIVE			Reviewer's Name:	EDD JACK	
City: HORTON	State:VA	Zip Code:24280	Reviewer's Title:	VENDOR LIAISON	
Telephone: (876) 971-71	Store Peer Group: 53		Telephone:	(804) 864-7813	
Most Recent RSMS Price Survey Date: 01/24/2013	Cash Registers: 55		E-Mail:	edd.jack@vdh.virginia.gov	

Visit Information	
Date of Review :	Type of Visit : 30 STOCKING VISIT

Observation/Results	
WIC Decal Posted : <input type="checkbox"/> Yes <input type="checkbox"/> No	Vendor Manual Complete : <input type="checkbox"/> Yes <input type="checkbox"/> No

Stocking Assessment								
Food Category	Food Description	Size/Minimum Required	Designated Shelf Label Posted	Minimum Stocked	Store Brand Declaration	Package Size	RSMS Price	Shelf Price
BABY FOOD, INFANT CEREAL AND SPECIAL FORMULAS	BABY FOOD FRUITS AND VEGETABLES (ANY BRAND)	64 (4 oz) Containers/Jars; must stock 2 types: single ingredient fruits & vegetables.	N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	N/A	N/A	\$00.63	\$
	GERBER INFANT RICE CEREAL, DRY	3 (8 oz) Boxes	N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	N/A	N/A	\$01.96	\$
CONTRACT FORMULAS	SIMILAC ADVANCE EARLYSHIELD CONCENTRATE	34 (13 oz) Cans	N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	N/A	N/A	\$05.18	\$
	SIMILAC ADVANCE EARLYSHIELD POWDER	9 (12.9 oz) Cans	N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	N/A	N/A	\$15.78	\$
	SIMILAC SENSITIVE CONCENTRATE.	34 (13 oz) cans	N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	N/A	N/A	\$05.18	\$
	SIMILAC SENSITIVE POWDERED	9 (12.6 oz) cans	N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	N/A	N/A	\$15.78	\$
DAIRY	EGGS, FRESH, LARGE	2 (1 dozen) Cartons	N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	N/A	N/A	\$01.78	\$
	MILK - LIQUID SKIM, 1%, 2%	5 (1) Gallon Containers	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	GREAT VALU	N/A	\$03.32	\$
	MILK - LIQUID SKIM, 1%,2%	3 (1) Quart Containers	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	MAYFIELD	N/A	\$02.18	\$
	MILK - LIQUID WHOLE	2 (1) Gallon Containers	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	GREAT VALU	N/A	\$03.56	\$
	MILK - LIQUID WHOLE	1 Quart Container	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	MAYFIELD	N/A	\$02.82	\$
	REGULAR AMERICAN CHEESE (SLICED)	1 Pound	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	GREAT VALUE	N/A	\$04.38	\$
	REGULAR CHEDDAR CHEESE (BLOCKED)	1 Pound	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	<input type="checkbox"/> Yes <input type="checkbox"/> No <input type="checkbox"/> N/A	GREAT VALUE	N/A	\$04.48	\$

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**

As Is....

VIRGINIA WIC PROGRAM-RETAIL STORE MANAGEMENT SYSTEM

User name last updated /Created prices: HARRY KIM WIC Id: 6057 Owner: JONGTAEK KIM
 Peer Group Id: 61 Total Store Hours per Week: 84
 Store Address: 43761 PARKHURST PLAZA , ASHBURN, VA 20147-5470
 Store Details Last Updated Date: November 14, 2011 Price Data Last Updated Date: May 25, 2012

Price Survey by Food Category

- STORE BRAND DECLARATIONS
- BABY FOOD, INFANT CEREAL AND SPECIAL FORMULAS
- CONTRACT FORMULAS
- DAIRY
- HOT AND COLD CEREALS
- OTHER ITEMS
- SINGLE FLAVORED JUICES
- WHOLE GRAINS

Print Price Survey

Confirm - All Prices

- [WIC Approved Food List Brochure](#)
- [Infant Formula Flyer](#)

[HELP](#)

RSLPFR

Food	RSMS Unit Size	Price	Avg. Price	Product Type
BABY FOOD FRUITS AND VEGETABLES (ANY BRAND)***	4 OZ.	00.79	00.71	OTHER
BABY FOOD MEAT	2.5 OZ.	01.19	01.10	OTHER
ENFAMIL NUTRAMIGEN LIPII - CONCENTRATE	13 FL. OZ	00.00	07.50	WIC APPROVED
ENFAMIL NUTRAMIGEN LIPII - READY TO FEED	32 FL. OZ	00.00	09.22	WIC APPROVED
ENFAMIL NUTRAMIGEN WITH ENFLORA - POWDERED	12.6 OZ.	00.00	23.75	WIC APPROVED
GERBER INFANT RICE CEREAL, DRY***	8 OZ.	02.79	02.38	CONTRACT BRAND
PEDIASURE WITH FIBER, READY TO FEED, SIX-PACK(S)	1 SIX-PACK	11.99	11.21	WIC APPROVED
PEDIASURE, READY TO FEED, SIX-PACK(S) ALL FLAVORS	1 SIX-PACK	11.99	10.84	WIC APPROVED
SIMILAC ALIMENTUM W/IRON, READY TO FEED	32 FL. OZ	00.00	09.27	WIC APPROVED
SIMILAC ALIMENTUM W/IRON POWDER	16 OZ.	28.99	27.66	WIC APPROVED

Save

Undo

Price Description Help

Costs and Paper forms

- Handling
 - Organizing
 - Storing
 - ❖ Distributing
 - ❖ Mailing
 - ❖ Copying
 - Reviewing
 - Scanning
 - Destroying

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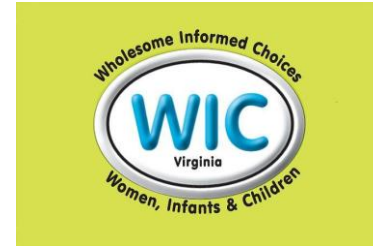
What is Checked?

- **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 Monitoring Review Op. Procedure
- 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)

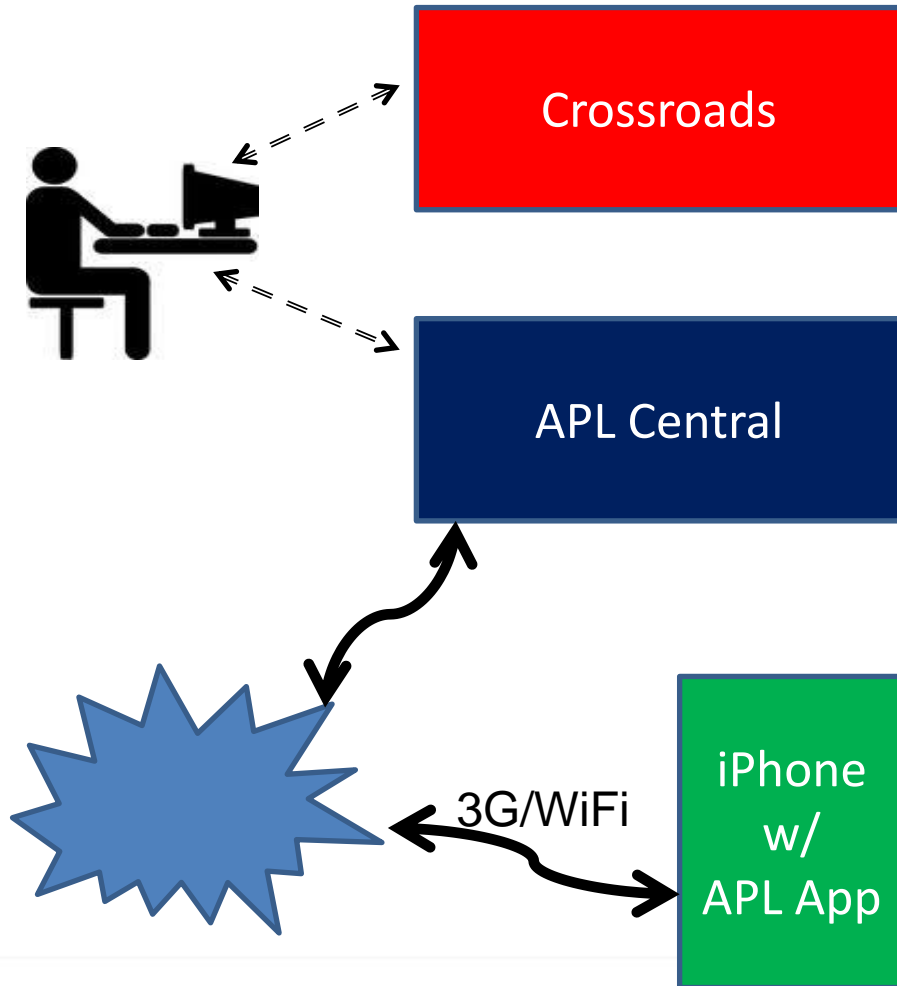
- Reflects the Current MSR
- Dynamic – change to reflect future requirements.
- Flexibility – create new forms – business requirements
- MSR description is displayed on iPhone
- Product eligibility: UPCs in APL
- Retailer Agreement: MSR met whenever store is open

*** 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



- 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

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

3G 1:59 PM

Cancel **Select Vendor**

Authorized De-Authorized All

Q Search Vendors... ←

A A

A.R. WATTS & SONS B
MILLERS TAVERN, VA 23115 C
D

AMERICANA GROCERY ROUTE 1 E
WOODBIDGE, VA 22191 F
G

ARARAT GROCERY H
ARARAT, VA 24053 I
J

B K

BE-LO #37 (CAMELLIA) L
NORFOLK, VA 23502 M
N
O

Select Vendor

Vendor Detail

Use

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**

Select Vendor

Vendor Details

Use

Name **TEST STORE 1**

Address **91 91ST STREET
ALEXANDRIA, VA 22314** >

County **City of Alexandria**

Peer Group **10 - Commissary**

Monitoring Review Form (v.9)

WIC Vendor # 0091

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

Status Authorized



Start Visit

Cancel

E-mail

3G 2:00 PM

Vendor Visits **Visit Details** End Visit

Monitoring Review Form (v.9)

Vendor	 TEST STORE 1 >
Started	Today, 2:00:01 PM

Minimum Stock


<input type="checkbox"/> Categories	<i>Incomplete</i> >
Status	Never submitted


Form Information

<input type="checkbox"/> Monitoring Visit	>
--	---





Photos	0 >
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●●●●○ 3G 9:55 AM 

[Cancel](#) **Edit Item**  [Done](#)

Food Cat Whole Grain (Brown Rice) >

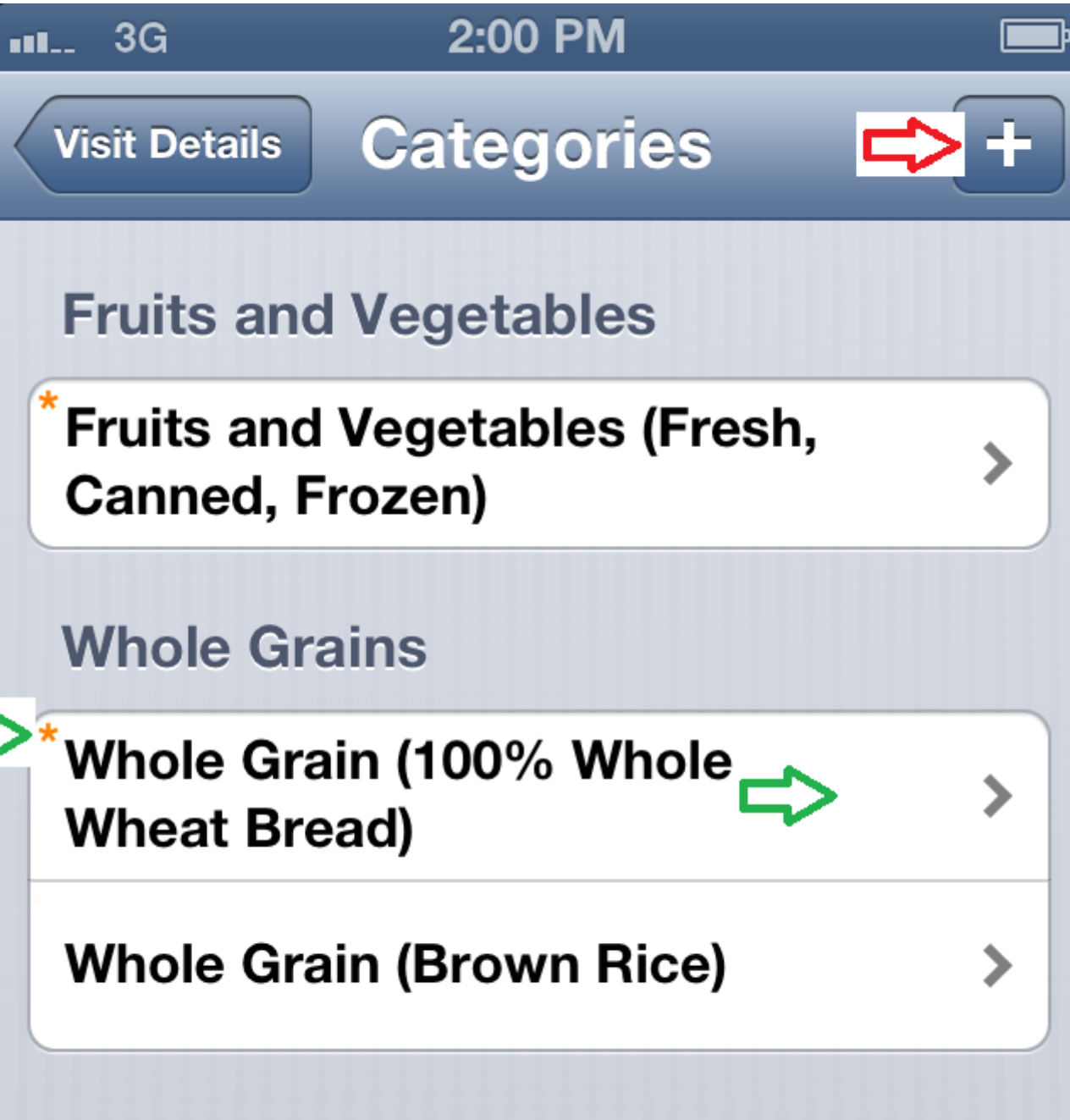
UPC/PLU 0725439110310  >

Item Quantity  99 >

Unit Price *(Optional)* >

Total Price --

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



●●●○○ 3G

9:54 AM



< Categories  Add Category



WHOLE GRAIN (BROWN RICE); REQ: ONE
16 OZ PACKAGE OF BROWN RICE

My Essentials Long Grain Natural...

0725439110310



Qty: 1

1 item

Tap '+' or scan the item to add.



Prices Are Posted

Yes

No

N/A



Optional shelf labels, if
used, are used
consistently

Yes

No

N/A

Minimum Stocked







Yes

No

N/A

Visit Details

Monitoring Visit

- *  **Number of eWIC Registers**  0 >
- *  **Type of Visit**  (select...) >
- * **Store does not display eWIC decal at the main door/window.**
- * **Store does not have a Retailer (Vendor) Manual on-site.**
- * **Store does not have WIC Approved Food List (English) in its WIC Retailer Binder.**



2:53 PM

3G

Vendor Signature

X  

Sign Here With Finger

George Grocer

06/11/2014

Back

 **Clear**

 **Accept**


 Vendor Visits

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.