

#	Concept	Topic area	Where presented - Venue	TTM #	Policy #	FP Module Update	Intro to WIC Module	Post to web?	Notes
1	Electronic Benefit Account (EBA)	Benefit Issuance	1 webinar				yes		
2	eWIC card	Benefit Issuance	1 webinar		501		yes		
3	Intro to Benefit list	Benefit issuance	1 webinar				yes		
4	Options for checking benefit balance	Cardholder	1 webinar				yes		
5	PAN - Card number	Cardholder	1 webinar		501		yes		
6	Foods will be debited from the balance in the units listed on the benefit balance .	Shopper Ed	1 webinar				yes		
7	ABCC rule for getting benefits - account, benefits issued, cardholder in TWIST, card issued		1 webinar				yes		
8	APL role in eWIC		1 webinar				yes		
9	Intro to aggregate benefits for family		1 webinar				yes		
10	JP Morgan's role in eWIC		1 webinar						
11	APL - UPC's	APL	2 webinar			yes			
12	Food Benefits	Benefit Issuance	2 webinar	3-500		yes			
13	Card/cardholder history	Cardholder	2 webinar	3-1200					
14	Required First Cardholder	Cardholder	2 webinar	3-1200	510				
15	Orientation to new FPA layout	Food Package	2 webinar	3-501					
16	Benefit List	FSS	2 webinar	3-1100		yes	yes		
17	Family Summary Screen Changes	FSS	2 webinar	3-1100					
18	The first cardholder can designate someone to be a second cardholder for shopping, or bringing children to certifications or attending second NE. The first cardholder must provide WIC the second cardholder name, DOB, and address (including ZIP code) to be issued a card for them.	Shopper Ed	2 webinar		510				
19	Overview of new Cardholder Screen	TWIST	2 webinar	3-1200					
20	Overview of changes to FSS	TWIST	2 webinar	3-1100, 3-501					covered in 3-501
21	Deaggregation - family changes		2 webinar						
22	Agency Conversion	Conversion	3 webinar						
23	Conversion in TWIST	Conversion	3 webinar						
24	Converting formula warehouse participants	Conversion	3 webinar						

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25	Family converts at once	Conversion	3 webinar						
26	Food Package Conversion, IB infants, specials won't convert	Conversion	3 webinar						
27	Paper or Plastic - don't mix	Conversion	3 webinar						
28	What must happen at conversion for each family - Required tasks	Conversion	3 webinar						
29	Participant Notifications	Operations	3 webinar						
30	Adjustments to Appt scheduler templates before and during eWIC conversion (longer or fewer)	Conversion	4 webinar						
31	Caseload considerations - conversion impact and recommendations	Conversion	4 webinar						
32	Every food package needs to be verified in TWIST during conversion - how does this impact appts.	Conversion	4 webinar						
33	individual versus groups for 2nd NE during conversion	Conversion	4 webinar						
34	New versus existing participants	Conversion	4 webinar						
35	Issuing food benefits to participants who missed 2nd NE.	Nutrition Ed	4 webinar		835, 511				
36	Option for using state developed WIC group session guide during conversion	Nutrition Ed	4 webinar						
37	Forms and Materials	Operations	4 webinar						
38	Signing new participant signature forms	Operations	4 webinar		635				
39	Staffing patterns based on clinic flow	Operations	4 webinar						
40	Program integrity - staff	Compliance	5 webinar		595, 596				
41	Equipment - IVR, participant web portal - clinic must have something available for participants who don't have their own access to one of these	Equipment	5 webinar		510				
42	Issuing food benefits to participants who missed 2nd NE.	Nutrition Ed	5 webinar		835, 511				
43	Clinic flow scenarios	Operations	5 webinar						
44	Cardholder policies	Policy	5 webinar		510				
45	CPA's assign food packages	Policy	5 webinar		660	yes	yes		

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46	Formula Replacement	Policy	5 webinar	3-504	561	yes			
47	Local agency policies or procedures required by rollout	Policy	5 webinar						
48	Location and use of draft e WIC policies - simultaneous old and new policy	Policy	5 webinar						
49	Policy around 1st and 2nd cardholder rights (NE, certs, etc.)	Policy	5 webinar		510		yes?		
50	Proof of ID	Policy	5 webinar		610		yes		
51	Separation of Duties	Policy	5 webinar		695				
52	eWIC card security	card inventory	6 webinar		501				
53	Card inventory policy- ordering and securing	card inventory	6 webinar		501				
54	Inventory - Compliance (reduces potential for card fraud)	card inventory	6 webinar		501				
55	Use of ucard webportal for card inventory	card inventory	6 webinar		501				
56	Card readers	Equipment	6 webinar	1-300					
57	Ask the store how to use your eWIC card at their store the first time you shop there . WIC foods may need to be separated.	Shopper Ed	7 webinar		635		yes		
58	Benefit balance will always print on their cash register receipt and can be saved for later reference.	Shopper Ed	7 webinar		635		yes		
59	Benefits are available at 12:01 a.m. Pacific Time on the first date available and expire at 11:59 p.m. Pacific Time on the last date.	Shopper Ed	7 webinar		635				
60	Cardholder understands that any purchase of a food not on the APL will automatically be rejected by the system and that the checker cannot override this.	Shopper Ed	7 webinar		635		yes		
61	Dealing with problems at the store e.g. denied transactions	Shopper Ed	7 webinar		635				
62	eWIC must be the first tender that will be debited, before SNAP, personal cards or cash.	Shopper Ed	7 webinar		635		yes?		

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63	Food benefits for all family members on WIC will be combined (aggregated) into a single benefit balance.	Shopper Ed	7 webinar		635		yes?		
64	Foods purchased with eWIC will be debited from their benefit balance.	Shopper Ed	7 webinar		635		yes		
65	How clients notify the state office of a food that should be on the APL	Shopper Ed	7 webinar		635				
66	If the system goes down, stores will not be able to do a manual eWIC transaction. Shopper will have to go to another store or come back when the system is up.	Shopper Ed	7 webinar		635				
67	Impact of APL on Shopping Experience	Shopper Ed	7 webinar		635				
68	No substitutions are possible. The cash register will only allow specific authorized foods or brands to be purchased with the eWIC card.	Shopper Ed	7 webinar		635		yes		
69	Shelf tags used by stores to identify WIC foods may not always be accurate or on all eligible foods. When in doubt, check the Food List to decide what you can buy.	Shopper Ed	7 webinar		635				
70	Store transaction dispute	Shopper Ed	7 webinar		635				
71	When applicable, explain that only infant, child, and adult formulas and medical foods can be purchased at a pharmacy (like Walgreens). Pharmacies cannot accept eWIC for any other foods, including milk.	Shopper Ed	7 webinar		635	yes			
72	New formulas - may take up to 48 hours to be added to APL	Vendor	7 webinar		635	yes			
73	No override for items not in APL	Vendor	7 webinar		635				
74	Regional vendor training plan and schedule	Vendor	7 webinar						
75	Shopping across county borders during pilot/roll out	Vendor	7 webinar						
76	Stand-beside vs. integrated stores	Vendor	7 webinar						
77	Communication plan with partners - who & how	Partners Outreach	8 webinar						
78	Formula and healthcare providers	Partners Outreach	8 webinar						

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79	Key general talking points: *card basics (differences with SNAP & still shop at authorized vendors) *timing of rollout *market basket *assurance of back up plan	Partners Outreach	8 webinar							
80	Sharing aggregate data with partners	Partners Outreach	8 webinar							
81	State partner communication plan or strategies	Partners Outreach	8 webinar							
82	Timing of communication/sharing with partners	Partners Outreach	8 webinar							
83	How Providence formula orders will be converted - timing and who	Conversion	9 webinar							
84	Med Doc changes	Food Package	9 webinar	3-503		yes				
85	Communication and coordination of formula issuance 1st month	Formula warehouse	9 webinar			yes				
86	Scheduling of Providence formula participants to avoid 2 systems	Formula warehouse	9 webinar							
87	Formula Warehouse	FSS - FW	9 webinar	3-503		yes				
88	FW - trouble shooting orders not received by participant	FSS - FW	9 webinar			yes?				
89	FW Benefits held - making changes during hold/ship period	FSS - FW	9 webinar	3-503		yes?				
90	FW report, orders sent	FSS - FW	9 webinar	3-503		yes				
91	Access to JPM report data	Reports	bike rack							
92	Not all stores stock all the brands on the Food List or all kinds of formula.	Shopper Ed	bike rack							Not an eWIC concept
93	Cash Register Receipt	Benefit Balance or Shopper Ed	FTF						2,1 v	
94	Dry milk or evap milk issuance process (size containers available)	Benefit issuance	FTF			yes			2	
95	Family benefits aggregated	Benefit issuance	FTF						2-covered in webinar 1	
96	Food Benefit Balance	Benefit Issuance	FTF						1 v	
97	Food Package Assignment vs Food Package Issuance	Benefit issuance	FTF	3-500					1	
98	Printing Benefits list	Benefit issuance	FTF	3-1200					1	

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99	Printing Benefits list at satellite clinics	Benefit issuance	FTF						2
100	Replacing Food Benefits	Benefit Issuance	FTF	3-502	561				1
101	Terminations removes benefits	Benefit Issuance	FTF		636				2,1
102	Custody Change with Benefits Issued	Benefit Issuance - Food Package	FTF	3-808	451				same as 146
103	Confusing Food Unit of Measure Abbreviations	Benefit List or Shopper Ed	FTF						same as 149
104	Foods in Ounces	Benefit List or Shopper Ed	FTF		635				same as 149
105	adding optional Second Cardholder	Cardholder	FTF	3-1200	510				1 - policy covered in webinar 5, screen introduced in webinar 2
106	Card replacement	Cardholder	FTF	3-1200	510				same as 176 v
107	Cardholder questions - where to go for what	Cardholder	FTF						same as 170 v
108	First Cardholder Address requirements, cascading, homeless	Cardholder	FTF	3-1200, 2-100	510				1
109	New cardholder screen functions	Cardholder	FTF	3-1200					1
110	PIN set options	Cardholder	FTF		510				1 v
111	Removing second cardholder	Cardholder	FTF	3-1200					1
112	Searching using card reader	Cardholder	FTF	3-1200					1
113	Use of IVR - interactive voice response	Cardholder	FTF		510				1 v
114	Use of Ucard webportal for participants	Cardholder	FTF		510				1 v
115	Participant violations	Compliance	FTF		590				3
116	Proxy in lieu of DQ (pending NLST/policy decision)	Compliance	FTF	3-102	590				3
117	Transfer of EBT family to non-eWIC agency	Conversion	FTF						1
118	Custody Change with FW order	Food Package	FTF	3-503, 3-808	451				1,2

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119	Definition of "generic" UOM like can, container and relationship to max foods	Food Package	FTF	3-501		yes			BL-I think this might fit better in 3-500, or in a job aid? 3
120	Food Package Assignment- benefit deaggregation	Food Package	FTF	3-501	561	yes			1
121	Formula Exchange	Food Package	FTF	3-504		yes			1
122	Formula Replacement	Food Package	FTF	3-504	561	yes			1
123	Issuing Additional Foods	Food Package	FTF	3-502		yes			1
124	Making Food Package Change when benefits have been partially spent	Food Package	FTF	3-502	561				1
125	New FPA status codes	Food Package	FTF	3-501,3-1100					1
126	Partial Food Packages	Food Package	FTF		769	yes			1
127	Participants with food benefits who have a category change	Food Package	FTF	3-502	561	yes			1
128	Removing Future Benefits	Food Package	FTF	3-1100	636				same as 142
129	Row Summary report	Food Package	FTF	3-500		yes			1
130	Template concept vs Food Packages	Food Package	FTF	3-500		yes			1
131	Template Nomenclature	Food Package	FTF			yes			1
132	Templates in "short list", tailor modify on modify screen. Not a template for everything	Food Package	FTF	3-500		yes			1
133	Using FPA quantity field to modify	Food Package	FTF	3-500					1
134	WE-M Food Package	Food Package	FTF		769	yes			1,1, 3
135	Modify screen - can select a different juice (64 oz/16 oz frz vs 48 oz/12oz frz)	Food Package - Modify	FTF						1
136	Modify screen - ensuring max benefit issued, e.g. multiple rows with milk/cheese	Food Package - Modify	FTF						1
137	Modify Screen - making a food package modification	Food Package - Modify	FTF	3-500,3-502	561				1
138	Modify screen - orientation to information available.	Food Package - Modify	FTF	3-500		yes			1
139	Quantity drop down on Modify, increments and broken cases	Food Package - Modify	FTF	3-502		yes			1

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140	When to Modify with modify screen	Food Package - Modify	FTF	3-500,3-502		yes			1
141	New codes on the FSS	FSS	FTF	3-1100					1
142	Remove benefits	FSS	FTF	3-1100, 3-805					1
143	Address Change with FW order	FSS - FW	FTF	3-503					1,2,3
144	eWIC Group NE Session Guide	Nutrition Ed	FTF						2
145	Changes to proof of ID policy	Policy	FTF		610		yes		2, 1,1
146	Guardianship changes, foster children	Policy	FTF	3-808	451				1
147	Participants transferring from out of state	Policy	FTF	3-804	653				1
148	Roles of each cardholder	Policy	FTF		510		yes		2 covered in webinar 5
149	Each food is listed in the units they can be purchased. Explain the units and abbreviations for the foods on the benefit list. E.g. CTR for PB or beans means a 16-18 oz Jar of PB or 16 oz. bag of beans .	Shopper Ed	FTF		769?, 635				1
150	Benefit balance will indicate when benefits become available and expire.	Shopper Ed	FTF		635				2 v
151	Brands and kinds of foods that are allowed or not allowed.	Shopper Ed	FTF		635				2
152	Call the Customer Service line or go to the U-card website immediately to report a card lost or stolen or to deactivate a second cardholder. This deactivates the card.	Shopper Ed	FTF		510		yes		1 v
153	Can purchase more than the value of the FV benefit and pay the difference with another form of payment .	Shopper Ed	FTF		635				3
154	Can use coupons, loyalty cards or BOGOs	Shopper Ed	FTF		635				3
155	Certain food benefits will be listed in ounces. These foods will have the total ounces in the container purchased debited from the benefit total. These include cereal, fish, infant cereal and baby food fruits and vegetables, and whole grains.	Shopper Ed	FTF		635				same as 149

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156	Change the PIN if it has been compromised.	Shopper Ed	FTF		510, 635		yes		1 v
157	Check your balance before you get to the check stand and throughout the month.	Shopper Ed	FTF		635				2 v
158	Do not ask for or accept rain checks	Shopper Ed	FTF		635				3
159	Do not return foods purchased with the eWIC card to store for money or a different product.	Shopper Ed	FTF		635				3
160	Do not sell or attempt to sell eWIC card or foods	Shopper Ed	FTF		635				3
161	Do not share the PIN with anyone and do not write the PIN on the card or in other places where it can be found.	Shopper Ed	FTF		635				2 same as 174 v
162	Explain the fractions of a gallon if any liquid milk is listed on the benefit list. E.g. .5 gal = ½ gallon	Shopper Ed	FTF		635				2, 1
163	Explaining in eWIC how many and which month's benefits are being issued at this visit.	Shopper Ed	FTF		635				2
164	Foods which must be purchased in specific sized containers (juice, milk, cheese, peanut butter, beans, eggs, fish) or with container types, sizes, and abbreviations that are likely to be confusing such as peanut butter, juice, baby food and milk.	Shopper Ed	FTF		635				1
165	FV Benefit is for a specific dollar amount listed on the benefit balance .	Shopper Ed	FTF		635				2
166	How to activate their card and set their PIN by calling the Customer Service line or logging in to the UCard website and using the cardholder data provided to the clinic (name, DOB, address including ZIP code).	Shopper Ed	FTF		635				1 v
167	If a PIN is entered wrong four times, the card will be locked. To unlock the card immediately, reset the PIN by calling Customer Service or on the U-Card website. If PIN is not reset, the card will automatically be unlocked at midnight.	Shopper Ed	FTF		635				2,1 v
168	If they feel they were incorrectly charged at the store, they have the right to dispute the transaction.	Shopper Ed	FTF		635				3

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169	Keep the card in a safe place.	Shopper Ed	FTF		635				same as 174 v
170	Knows where to call: Call the WIC clinic if you weren't allowed to purchase a food that you think is WIC eligible, if you have questions about your food benefits or if you received poor customer service at the store. Call the U-Card Customer Service line if you had trouble using your card, need to reset your PIN, or need to dispute a transaction.	Shopper Ed	FTF		635				1 v
171	Lost or Stolen card	Shopper Ed	FTF		635				same as 176 and 152 v
172	Minimum Participant shopper Ed requirements	Shopper Ed	FTF		635				1
173	Modify screen - new juice option for children	Shopper Ed	FTF						same as 135
174	Participants to keep cards secure	Shopper Ed	FTF		635				2 v
175	Replacement Cards	Shopper Ed	FTF		635				same as 176
176	Replacement cards can be requested and mailed from the Customer Service phone line or U-Card website. Replacement cards can also be obtained in person at the WIC office.	Shopper Ed	FTF		635				1 v
177	The current month of benefits is the only one available for use.	Shopper Ed	FTF		635				1
178	The different options for checking their benefit balance include: 24/7 phone, website, print balance at store, benefit list at WIC	Shopper Ed	FTF		635				1 v
179	The first cardholder is responsible for teaching the second cardholder how to use the card.	Shopper Ed	FTF		635, 510				2 covered in webinar 5
180	Unused benefits do not roll over to the next month.	Shopper Ed	FTF		635				1