

## ✓ Task Checklist

Use this checklist to plan for and document completion of the eWIC readiness tasks. The tasks are listed by CeRT section and have a month or date by which each task should be completed. Using your agency's conversion date and the recommendations from the eWIC Readiness Activity Timeline, fill in the month your agency plans to complete each task. Once the task is finished, enter the date it was completed. Your state nutrition consultant will be checking in periodically to provide technical assistance and ensure that your agency is on track for implementation.



#	Task	Complete no later than:	Plan to Complete by:	Completed:
<b>Section 1</b>	<b>Introduction to the Clinic eWIC Readiness Toolkit – CeRT</b>			
	Develop a plan for completing all readiness activities.	5 months before conversion		
<b>Section 2</b>	<b>Conversion – Changing from Vouchers to eWIC</b>			
	Make a plan for notifying participants of the change to eWIC, including dates to begin.	3 months before conversion		
	Discuss how conversion processes impact voucher issuance and appointment scheduling plans in your agency in the months leading up to your agency conversion date.	2 months before conversion		
	Determine how each of the required conversion tasks will be completed for a family.	Conversion		
<b>Section 3</b>	<b>Appointment Schedule and Caseload Management</b>			
	Make adjustments to your agency's Appointment Schedule for staff planning and preparation, viewing required webinars, and attending required face-to-face training prior to eWIC conversion.	4 months before conversion		

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	Make adjustments to your agency's Appointment Schedule which allows time for the required tasks that need to be done during the month(s) of eWIC conversion.	Conversion		
<b>Section 4</b>	<b>Clinic Flow</b>			
	Identify who will be responsible for tasks associated with benefit issuance.	eWIC Face-to-face Training		
	Determine where each step of benefit issuance will happen.	eWIC Face-to-face Training		
	Evaluate the effect of separation of duties changes on staff assignments.	eWIC Face-to-face Training		
	Assign appropriate eWIC responsibilities to each staff position.	eWIC Face-to-face Training		
	Complete the clinic flow chart.	eWIC Face-to-face Training		
	Assess the impact of changes associated with individual appointments and group education sessions on clinic flow.	eWIC Face-to-face Training		
	Identify the most efficient flow possible for each situation in each clinic setting.	eWIC Face-to-face Training		
<b>Section 5</b>	<b>Equipment</b>			
	The amount of voucher stock and MICR toner cartridges needed through roll-out have been calculated.	5 months before conversion		
	A plan is in place for ordering additional amounts of voucher stock and MICR toner cartridges if needed.	3 months before conversion		
	Once you receive card readers, install them on the appropriate computers in your agency and swipe an eWIC card through them to ensure they are working.	eWIC Face-to-face Training		

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	Report any non-functioning equipment to App Support and you will be sent a replacement unit.	eWIC Face-to-face Training		
	A plan is in place for what your agency will do with the MICR printers after roll-out.	2 months after conversion		
<b>Section 6</b>	<b>eWIC Cards and Inventory</b>			
	Plan for storage and security of eWIC cards before receiving inventory.	6 months before conversion		
	Your agency will receive a shipment of eWIC cards at each Distribution site that will last approximately 6 months from your conversion date. Record the number of sleeves received on the eWIC Card Monthly Inventory Log and fax or email the packing slip to the State Data Team Office Assistant.	5 months before conversion		
	Identify the person in your agency who will perform the monthly eWIC card inventory (this person must be different from the person ordering cards).	2 months before conversion		
	Ensure that the card the staff designated to order cards and perform monthly inventory have read and understand Policy 501e- <i>Ordering and Securing eWIC Cards</i> .	2 months before conversion		
	Clinic allocation and satellite distribution methods selected.	2 months before conversion		

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<b>Section 7 Participant Materials</b>				
	For forms that are being replaced, we have checked available stock and have a plan to only reorder what we'll need until our conversion date.	3 months before conversion		
	Our locally developed forms that mention vouchers have been revised for eWIC or we have a plan for updating locally developed forms.	Conversion		
	We have a plan for pulling old forms and stocking with the new and revised forms.	Conversion		
<b>Section 8 Partner Notification and Promotion</b>				
	Develop a plan for how you want to notify partners about eWIC changes to the program.	Conversion		
<b>Section 9 Summary of Policy Changes</b>				
	Review the state eWIC policies with staff.	4 months before conversion		
	Develop a timeline for writing new or modifying existing local agency procedures and policies.	3 months before conversion		
	Draft and submit your local agency eWIC procedures to your assigned Nutrition Consultant for review and input 2 months prior to your agency eWIC conversion date.	2 months before conversion		