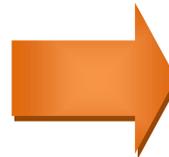




Section 2: Conversion and Participant Notification – Changing from Vouchers to eWIC

Overview

What is conversion? Simply put, conversion is what happens when a family of participants is changed from receiving benefits via vouchers to benefit issuance via an eWIC card.



Your agency will need to gradually convert participants from a paper voucher environment in TWIST to an eWIC environment, while still maintaining the voucher environment until all participants statewide convert to eWIC and all issued vouchers are redeemed. The process of converting each family to eWIC involves completing several steps face to face and will take some time. It will likely take several months to convert all the families in your agency.

This means that until all of the families in your agency are converted, you will be working with dual systems in TWIST – part of your caseload on vouchers and part using an eWIC card. The result is two sets of reports to review, two sets of policies to follow, two different processes for providing service to families. While you can see that making the change as quickly as possible would be beneficial, the impact of a hasty conversion on caseload and long term clinic operations must be considered. To accommodate this process while maintaining caseload you will need to plan for changes to your clinic flow and schedule.

This section of the toolkit will provide you with information about how the conversion process will work and provide you with some tools to help you plan for the needed changes.



Have you viewed the “*Conversion Plan and Participant Notification*” webinar?

Agency conversion

Each agency will be given a specific “Agency Conversion Date”. On this date, your staff will be able to access the eWIC screens in TWIST and begin to issue eWIC cards and assign benefits via eWIC. New families scheduled on this date or later will be enrolled directly on eWIC. Existing participants scheduled on this date or later may be eligible to be converted to eWIC. The agency



conversion date does not have to be on the first day of the month because each family will convert individually, starting with the first month when no vouchers have been issued for anyone in the family. It will take your agency up to 4 months to convert all families to eWIC, depending on how you issue vouchers in the 3 to 4 months prior to your conversion start date.

Questions for Consideration

- What would be the impact on your clinic and caseload if you issued vouchers and scheduled participants in such a way that they stayed on their normal appointment pattern and were converted over a 3 month period versus changing their pattern and converting them more quickly?
- Which participants, if any, might benefit from converting more quickly?
- In the months leading up to conversion, what critical thinking will certifiers and clerks need to perform in order to determine how many months of vouchers to issue for the family and how to schedule their next appointment?

Participant notification

In 2013, the state sent you 2 posters and a supply of two 1/3 sheet notification flyers (pictured in this section) that can be used for participant notification. As we roll out eWIC in 2015-2016, the “Safe Simple Convenient Poster” and both of the notification flyers will continue to be used; the customer service poster will be replaced. Click [here](#) to see the posters.

Posters and flyers are in English and Spanish. You were originally sent enough posters for about two per permanent clinics and enough flyers for one of each per family. We will send details on how you can replenish your initial supply, if needed. Once your initial supply is replenished, additional flyers can be printed from the website. The revised poster and the participant notification materials you need will be sent to your agency in August 2015

Initial notification

In the months leading up to your agency’s conversion date, you will want to begin to let families know about the big change that is coming. Some agencies have suggested that they will begin the notification process about 6 months before their conversion date, possibly when participants are in the office for certifications.

The “Safe Simple Convenient” poster and the “Coming soon to your WIC clinic” flyer focus on three basic messages:

- 1) eWIC is safe – no more worries about lost or stolen vouchers;
- 2) eWIC is simple – just take the card to the store; and,
- 3) eWIC is convenient – you don’t have to get all your food in one visit to the store.

Consider using these basic messages in any other communication (bulletin boards, participant newsletters, Facebook pages, group sessions) with participants in the months leading up to eWIC conversion.



Coming soon to your WIC clinic...

Oregon eWIC!

Safe
No more worrying about your WIC vouchers being lost or stolen.

Simple
Just take your eWIC card to the store.

Convenient
You won’t have to get all of your food in one visit to the store.

Same foods, same amounts
Just shop using the Oregon eWIC card.



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Final notification

At the last appointment prior to eWIC conversion, you will want to notify participants of the month they will be eligible to convert to eWIC and schedule them for an appointment in the month prior to that eligibility. (See Section 3: Appointment Scheduling and Caseload Management for more information.)

Providing this notification does four things:

- 1) It provides an opportunity for you to explain what will happen at the next appointment;
- 2) It helps participants understand that they cannot get eWIC any earlier than the month indicated;
- 3) It indicates that they may not be able to shop with the eWIC card until the month after it is issued; and,
- 4) They will need certain information in order to be issued eWIC cards.

Providing this brief orientation to eWIC before conversion may smooth the process and help your staff think critically when issuing vouchers and scheduling families during the conversion period.

Questions for Consideration

- Where in your current clinic flow would you provide participant notification flyers?
- How will you notify participants attending group NE?
- How will you use the posters?
- What forms of communication other than posters and flyers, if any, might you consider?

Example: Ford WIC Agency

Review this example of how one agency issues vouchers and schedules appointments.

Your family will be getting an Oregon eWIC card soon!

In _____ you will be issued an eWIC card when you come into the WIC clinic.



To make shopping easier, you can get a second card for your family.

For each person who will get a card, please bring:

- First and last name
- Date of birth
- Address, including zip code (this can be a home, mailing, or work address)

_____ is the first month you can begin using your eWIC card when you shop. Families can't use both vouchers and eWIC in the same month.

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- Ford Agency is assigned an agency conversion date of April 14, 2016.
- Staff from Ford Agency will attend face-to-face training on using the new TWIST screens on April 1.
- The WIC Coordinator, Tara Taurus, works with her staff and determines that initial participant notification will start in October of 2015.
- Starting the beginning of January they would begin seeing participants whose next appointment may fall on or after April 14.
- In January, Ford staff will begin notifying families whose last set of vouchers falls in April or later, that at their next appointment they will be converting to eWIC.
- Ford Agency staff decide to keep families on the same voucher issuance and appointment schedule in order to minimize disruption.

January	February	March	April	May	June	July
			Agency Conversion date 4/14			
Family #1 appt – issued 3 months vouchers	Vouchers	Vouchers	Vouchers Appt. after 4/14 Issued eWIC card for May	eWIC benefits 	eWIC benefits	eWIC benefits
	Family #2 appt – issued 3 months vouchers	Vouchers	Vouchers	Vouchers- Appt. Issued eWIC card for June	eWIC benefits 	eWIC benefits
		Family #3 appt - issued 3 months vouchers	Vouchers	Vouchers	Vouchers- Appt. Issued eWIC card for July	eWIC benefits 
			Family #4 – new enrollment after 4/14. Issued			



Activity: Dates for participant notification

Use the following table to identify dates for action

Action needed	Date	Notes
What is your agency’s assigned conversion date?		
When would you want to begin notifying participants that eWIC is coming?		
When would you start scheduling participants for appointments on your agency conversion date?		
When would you start notifying participants about the month they can convert to eWIC?		

Converting a WIC family

Paper or Plastic?

Families will be eligible to change from vouchers to eWIC the first month after the agency conversion date that no vouchers have been issued to anyone in the family. Because eWIC benefits are aggregated for all family members, the entire family must either all be on vouchers or all be on eWIC. Vouchers and eWIC don’t mix because they have two different max food calculations in TWIST and because they have two different reconciliation processes at the bank. Even voided vouchers still count as vouchers having been issued for that month. TWIST keeps a record of all voucher issuance, even if they are voided.



Family Cut-off Dates

Once your agency is converted, if a staff person accesses the Food Package Assignment screen (FPA), the Family Summary Screen (FSS), or the new Family Cardholder Screen (FCS) for a family, TWIST will establish the eWIC “cut-off date” for that family. The cut-off date is set for the whole family and is the date after which the old FPA and old FSS for vouchers will be truncated and no longer be usable, and a family can no longer have vouchers printed. Up to the cut-off date, the old FPA and FSS can still be used to replace vouchers that were issued. After the family cut-off date only eWIC benefits may be issued.

Establishing an Electronic Benefit Account (EBA)

Families are not converted to eWIC until they have established an EBA with our eWIC banking contractor. An EBA is set up when either an eWIC card is issued using the Family Cardholder Screen (FCS) or benefits are issued using the new eWIC Family Summary Screen (eFSS). It is recommended that both of these tasks happen at the same time for each family. Your staff will need to do several things to complete these processes.

What must happen when you convert the family and establish an EBA?

It will take a staff person approximately 10 minutes per family to complete the full conversion which includes the following required tasks:

- Complete the Family Cardholder Screen for the family
 - Enter name, date of birth, and address for up to two cardholders
 - Issue the eWIC card(s)
- Check each participant’s food package on the FPA
 - About 3-4% of participants’ food packages will not convert and will need to be manually assigned on the eWIC FPA. This includes most women or children with the “Special” designation, all partially breastfed infants, and participants who are receiving less than the maximum food assignment.
 - Complete any formula warehouse orders needed. This may require special planning for the first month’s transition from a paper ordering process to using eWIC. eWIC orders will get mailed from Providence by the 5th of the month rather than the 1st.
- Issue eWIC benefits from the new FSS.



- Review a new eWIC *My Rights and Responsibilities* form (57-630) with the new cardholder and have them sign a new *Participant Signature* form (57-629) with all converting families because rules and procedures change with eWIC.
- Review the eWIC Benefit List and provide a printed copy if requested.
 - Describe the aggregation of the family benefits
- Provide Cardholder and Shopper Education
 - This will include instruction on the roles of the first and second cardholder, how to set the PIN for eWIC cards, card security, use of the card when shopping, how to access the family benefit balance, use of the cardholder web portal and customer service phone line, etc.

How early should I convert the family?

Since there is a lot for a family to learn and remember when they change to eWIC, *it is highly recommended that you make the final conversion in the month immediately preceding their first month of eWIC benefits.* Up until that time, continue to use the old FPA and FSS to address any food package or voucher issues.

TWIST will allow you to issue an eWIC card to a family, and therefore convert a family, any time after your agency conversion date. This can happen at either individual appointments (certs, recerts, high risk follow ups, individual education, or group appointments (NE, BF peer counseling). Since you will want to wait to issue an eWIC card as close as possible to the time when it will be used, it will be especially important for staff to use critical thinking when scheduling and making food package changes until then.

Example: The Hyundai family

Review the following example, to see how a family is converted.

The Hyundai family goes to the Ford Agency for WIC services. Ford's agency conversion date is April 14. The family comes to the clinic in March for a recert for Elantra. Sonata and Azero were recertified in February and issued vouchers for March, April and May. They have an NE appointment scheduled



for May. The certifier who recertified Elantra knows that the first month that the Hyundai's could receive eWIC benefits will be June because there are vouchers issued to the family through May. The certifier provides the 1/3 sheet eWIC participant notification with the notation that May is the month to be issued an eWIC card and June is their month to start using it at the store. The certifier will schedule Elantra for the same appointment for May.

When the Hyundai's come to their appointment in May and a WIC staff person accesses the Family Summary Screen, TWIST will set a Family Cut-off Date of May 31. They will not be able to issue any vouchers past that date. Up until May 31, WIC staff will be able to make changes to food packages and vouchers using the old Food Package Assignment screen. At the May appointment, they will be issued an eWIC card and provided shopper education on its use. The family will be assigned food benefits for each participant on new Food Package Assignment screens and issued eWIC benefits from June onward from the new Family Summary Screen.

Family member	February	March	April -	May	June
		eWIC final notice given to family	Agency conversion date 4/14	Convert to eWIC – issue eWIC card and June benefits	First month family can use eWIC benefits
Elantra	Vouchers issued	Recert appt Vouchers issued	Vouchers issued	Vouchers issued	
Sonata	Recert appt Vouchers issued	Vouchers issued	Vouchers issued	Vouchers issued Appt for NE	
Azero	Recert appt Vouchers issued	Vouchers issued	Vouchers issued	Vouchers issued Appt for NE	

Questions for Consideration

- Considering all the tasks that must happen for every participant and every family to convert to eWIC, where in your clinic processes will each occur? How will you ensure that they are all done for all participants?
- What changes, if any, to your schedule will you have to make in order to accommodate the time needed to convert each family?
- What changes, if any, will be made to how vouchers are issued and appointments are coordinated for family members?

Note: Please refer to Section 3: Appointment Scheduling and Caseload, and Section 4: Clinic Flow for more information.



✓ Task Checklist:

- ✓ Make a plan for notifying participants of the change to eWIC, including dates to begin.
- ✓ Discuss how conversion processes impact voucher issuance and appointment scheduling plans in your agency in the months leading up to your agency conversion date.
- ✓ Determine how each of the required conversion tasks will be completed for a family.