

# eWIC FTF Training Design updated 12/4/15

## Goal

After this training, local agency staff will have the skills and knowledge needed to successfully implement eWIC in their agency.

## Objectives

1. Upon completion of this training, local agency staff will demonstrate accurate issuance of eWIC cards to WIC families in a variety of situations.
2. Upon completion of this training, local agency staff will demonstrate appropriate eWIC benefit issuance and shopper education.
3. Upon completion of this training, local agency staff will be able to assign non-standard templates and modify food packages in TWIST to meet participant needs as needed.
4. Upon completion of this training, local agency staff will be able to identify resources which support conversion from vouchers issuance to eWIC processes.
5. Upon completion of this training, local agency staff will be able to analyze a variety of family circumstances and use critical thinking to determine the best course of action for each situation.

## Before Training

1. Ensure local agencies bring the appropriate laptops to the regional training along with the card readers that go with them.
2. Request locals bring their phone to access the IVR for PIN set
3. NC's to check with agency coordinators to ensure staff have viewed the required webinars, know their p#, have watched the participant videos

## Activities

- 1: [Getting Started](#)
- 2: [Converting a Single Participant to eWIC](#)
- 3: [Converting a Family to eWIC](#)
- 4: [Cards and cardholders, Food Package Modifications, and Formula Warehouse](#)
- 5: [Food Package Modification and Formula Exchange](#)
- 6: [Miscellaneous](#)

## Materials needed

### *Workbook (1 document that includes the following)*

- a. **Handout** – Agenda
- b. **Handout** – ABCDE of eWIC Conversion
- c. **Activity Sheet 1** – Getting Started

- d. **Activity Sheet 2** – Converting a Single Participant to eWIC
- e. **Activity Sheet 3** – Converting a Family to eWIC
- f. **Activity Sheet 4** – Cards and Cardholders, Food Package Modifications, and Formula Warehouse
- g. **Activity Sheet 5** – Food Package Modification and Formula Exchange

### ***Resource packet***

- h. Cover page with ABCDE of eWIC Conversion
- i. Table of Contents
- j. **Handout** – Rights and Responsibilities (Clinic Form)
- k. **Handout** – Participant Signature form (Clinic Form)
- l. **Job Aid** – Compare First and Second Cardholder (ITW)
- m. **Job Aid** – Food Packages and Template Codes (FP Module)
- n. **Job Aid** – Standard Food Packages job aid (FP Module)
- o. **Job Aid** – FPA status codes (TTM)
- p. **Job Aid** – Benefits List – Helping Families Use/ Food Units (TTM)
- q. **Handout** – Shopper Functions Cheat Sheet
- r. **Job Aid** - Modifying Food Packages (TTM)
- s. **Handout** – Replacement of Unavailable/Stolen Formula (57-912 on web)
- t. **Job Aid** - Termination Reasons and Benefit Issuance (TTM)
- u. **Handout** - What can we do over the phone
- v. **Job Aid** – Missed NE Appointments and NE Refusal (TTM)
- w. **Job Aid** - Issuing Evaporated and Dry Milk (FPA module)
- x. **Job Aid** – Food package for Pregnant and Breastfeeding (TTM)
- y. **Job Aid** - Assigning Food Packages for Fully BF Twins (TTM)
- z. **Handout** – Issues and Solutions document (TTM)

### ***Resources***

- a. Lists of virtual card numbers (1/person)
- b. eWIC plastic cards (1/person)
- c. Using Your Oregon eWIC Card (Cardholder) brochure(1/person)
- d. How to shop with your eWIC card brochure (1/person)
- e. Baby Food 1/3 sheet insert (1/person)
- f. Participant ed videos (4 on DVD)
- g. PowerPoint slide deck
- h. Examples of new ID card
- i. Folders (put in WIC ID card, food list, Benefits List, How to Shop brochure, Cardholder brochure, sample receipt, online NE certificate)
- j. Sign in sheets
- k. Middle initial cards for PDB assignment

## Equipment – See Regional Materials List

### Training Outline

#### Activity 1 – Getting Started

1. Introductions, logistics, log in to computers
2. Have everyone sign the registration sheet.
3. Orient to Workbook and Resource/handout packet
4. **Workbook p.1** – Agenda
  - a. Review what to expect for the day
5. **Workbook p.3** – Getting Started
6. Login to computer
  - a. Use computer login and password given
7. Log in to Citrix
  - a. Use personal P number and password
8. Login to Practice Data Base
  - a. Use state provided generic logins
  - b. Access the correct local agency for the specific training. This may not be their own local agency. See table below for the Practice DB agency that is assigned for the specific training. **Note:** Do not use another agency as will cause problems for those using the agency for training.
  - c. When searching for participants, select the agency, and search for your assigned participant with agency and middle initial ,
  - d. **Resource** – Middle initial cards in blue and buff can be handed out to assign everyone a different initial.
  - e. Data in the practice data base will be refreshed monthly and you can access this anytime.
9. **Resource** - list of virtual card numbers to use and to keep for practice (these can be re-used each month)
  - a. The scenarios in the workbook could be reused for practice.
  - b. We really encourage folks to plan on an hour or two between now and when your agency implements using the practice data base to review screens you are unclear about after the training.
10. Review process for this training

Agency assigned to each Training Group	Staff #	Training Location	Training Dates	Training Week	Agency Conversion Date	Practice DB Agency
Benton + Linn	18	PSOB	8/27	8/24/15	9/8/15	Linn, Benton
Marion + Polk	28	Salem	1/5, 1/6	Week 1	1/19/16	Marion, Polk, Lake
Salud Medical Center	24	PSOB	1/5, 1/6	1/4/16		Salud, Harney
Lane + Coos	23	Eugene	1/12, 1/13	Week 2	1/25/16	Lane, Coos
Multnomah County	48	PSOB	1/12, 1/13, 1/14	1/11/16		Multnomah N, M, E, C
Make up Training		PSOB	1/21	Week 3	2/1/16	Tillamook
Clackamas	17	PSOB	1/19, 1/20	1/18/16		Clackamas, CTU
Lincoln + Tillamook	9	Lincoln C.	1/20	Holiday		Lincoln
Jackson + Josephine	23	Medford	1/26, 1/27	Week 4	2/8/16	Jackson, Josephine
Curry + Douglas	14	Roseburg	1/28	1/25/16		Douglas, Curry
Washington	29	PSOB	1/26, 1/27			Washington, Union, Wallowa
Deschutes + Crook	16	Bend	2/2, 2/3	Week 5	2/15/16	Deschutes, Crook
CT Warm Springs + Jefferson	10	Madras	2/4	2/1/16		Jefferson
Clatsop + Columbia	10	PSOB	2/4			Clatsop
Make up training		PSOB	2/2			CTWS
Klamath + Lake	10	K Falls	2/10	Week 6	2/22/16	Klamath
Hood River + N. Central Health	10	PSOB	2/10	2/8/16		Hood River
Make up training		PSOB	2/17	Week 7 2/15/16 Holiday	2/29/16	Columbia
Harney + Malheur	11	Ontario	2/23	Week 8	3/7/16	Malheur
Union + Wallowa + Baker	8	LaGrande	2/24	2/22/16		Baker
Grant + CTU + UMHS	16	Pendleton	2/25, 2/26			UMHS, Grant
Make up training		PSOB	3/3			North Central

## Activity 2 – Converting a Single Participant to eWIC

“Once your agency is converted, we expect the most common situation to start with will be participants coming in with vouchers already issued for this month. Families will need eWIC cards issued and eWIC food benefits to be issued for next month. Unfortunately, the practice database we are using for your training today does not show our “practice families” having vouchers issued for this month. We’ve got some slides to show later with examples so you can see what it will look like when a family has vouchers issued for current and future months.

### 1. Conversion “the big picture”

- a. Every agency will differ on where they begin the process for each family: on the Family Summary Screen, Family Appointment Record, or Daily Clinic Schedule. Where do you generally start each appointment?

- b. To start, remember every Family will have to be reviewed and taken through the basic steps of the eWIC conversion process.
- c. **Workbook p.2** – conversion steps

### **ABCDE of eWIC conversion**

- A.** **Assign** benefits (check the FPA and save the correct food package)
  - B.** **Benefits** issued (on FSS)
  - C.** **Cardholder** assigned and eWIC **card** issued (on FCS)
  - D.** **Documents** signed (review Rights and Responsibilities and sign a new Participant Signature form)
  - E.** **Educate** the shopper (print a Benefits List and provide shopper education)
- d. These steps can be done in any order by any staff person. We will show you some examples of different ways to do this, but your agency will have decided how this might work.
  - e. It starts with knowing which families have converted or been issued eWIC cards and which haven't. You can find that information out on the *Family Summary Screen*, the *Food Package Assignment screen*, or the new *Family Cardholder Screen*. You will not be able to see this on the appointment related screens such as the Daily Clinic Schedule or the Family Appointment Record.
  - f. It is important to note that opening any one of these 3 screens (FCS, FSS, FPA) will initiate the conversion process for these clients. So even looking someone up when they call about an appointment will assign a conversion date. That doesn't mean you have to finish conversion at that time, but it will mean they are on the road to conversion and can't be issued any more vouchers –even if they move.
  - g. We talked about these screens in the “Conversion” webinars that you viewed before. At that point we focused on what they would look like before your agency converted, today we will be looking at what the screens look like after your agency converts.

### **2. D for Documents - Rights and Responsibilities/Participant Sig. Form.**

Let's start the conversion process with D “Documents” –every family gets a new R&R and signs a new Participant Signature form. This form tells the family of new eWIC related rules.

- i. **Handout** p. 1-2 – Rights and Responsibilities –
- ii. **Handout** p.3-4– Participant Signature form
- b. Because of eWIC and eWIC card security, every family has to sign a new eWIC Signature Form – even if they convert at a non-certification appt. After conversion, you will go back to just having them sign at certs and recerts.
- c. Highlight why/what is different with the new R & R procedure and form
  - i. Voucher language changed to card/benefit language

- d. Reinforce new way to explain R&R from the Operation Clean Up in-service (review a couple of key items from the 3 sections on the R&R – Rights, Responsibilities, Rules.
  - i. The cardholder is responsible for keeping the card and PIN secure and training additional cardholder on the rules.

### 3. C for Cardholders and cards – Assigning cardholders and issuing an eWIC card

- a. Let's do the cardholder info first
- b. **Workbook p. 5** – Converting a Single Participant to eWIC.
  - i. Our first family is the Tidewater family. You will see in your packet Activity Sheet 2 – Converting a Single Participant to eWIC. You will use the information on this sheet for our practice. Julie Tidewater is a 5 month old on Similac Advance Powder.
- c. For our scenario, we assumed that you already “Showed” the participant and then Fast Pathed to the new Family Cardholder Screen.
- d. To make sure you know how to access the FCS go to Client Processes – Look up – select Family Cardholder Screen. This screen is another family screen, like the family summary screen and the family appointment record, and is used by the whole family. Later you will be able to access the whole family with a swipe of the card and then fast pathing wherever you want to go.
- e. Review major sections of the screen
  - i. Search criteria- there are two ways to search for a family:
    - Open blue folder and go to Search screen
    - Use the eWIC card Search field and either type in the card number (if cardholder is on the phone) or swipe the card through the card reader (if in the clinic).
  - ii. 1<sup>st</sup> cardholder data
  - iii. 2<sup>nd</sup> cardholder data
  - iv. Note that this is a family screen and there is a list of family members at the bottom. Selecting the family member here will allow you to Fast Path anywhere you need to go.
- f. Search for Julie Tidewater from the FCS using the Open folder icon. Search for the participant that has been assigned to you (narrow search by selecting today's assigned agency and your assigned middle initial).
  - i. Assign specific families to each trainee – **Resource** – Middle initial cards in blue and buff can be handed out to assign everyone a different initial.
  - ii. Family Cardholder Screen will allow you to Fast Path from here almost anywhere
- g. Address for 1<sup>st</sup> cardholder defaults to family address in client master. This ensures that the cardholder and family address stay in sync and assumes that the first cardholder is a member of the household receiving benefits.

- i. The address data will be used by us over phone and by banking contractor for security purposes. It is super important that it be correct, so it will be important to keep this up to date in the Client Master.
  - 1. A system flaw – won't accept the Plus 4 on the zip code when PINing. If see this, will need to remove on Client Master and save.
- ii. If there are multiple addresses in client master, the FCS will select 1) mailing, 2) home, 3) work, 4) address required if none of the above available.
- iii. How would you handle it if the family is homeless? TWIST will give you a message if you only choose homeless or unknown as the address type in client master. You can select a second address (mailing, work, etc.) to put in TWIST that can be remembered by the cardholder. It could even be the clinic address if the cardholder could remember it when they PIN their card.
- h. Role of 1<sup>st</sup>, 2<sup>nd</sup> cardholders
  - i. **Handout p.5**: Compare First and Second Cardholders job aid
  - ii. Review this handout and think about the cardholder policy – what do you notice about the difference between the 1<sup>st</sup> and 2<sup>nd</sup>?
  - iii. How does this compare with the first and second signer now?
  - iv. If not mentioned point out:
    - 1. 1<sup>st</sup> required and must be entered first, 2<sup>nd</sup> optional
    - 2. 1<sup>st</sup> – participant, parent, caregiver - 2<sup>nd</sup> anyone picked by 1<sup>st</sup>
  - v. Similar to difference between the first and second signer on the current ID card.
  - vi. First cardholder has authority and responsibility, 2<sup>nd</sup> cardholder supports the first only. Cards should only be initially issued to the first cardholder.
  - vii. Data from the cardholder screen is used for security purposes and can be used by WIC staff to verify identity when calling on the phone etc. This is one reason for the relationship field.
- i. Review roles using some of the questions:
  - i. Who can be the First Cardholder? (member of household)
  - ii. Where does the First Cardholder live? (with participant)
  - iii. Who can select a second cardholder? (first cardholder)
  - iv. When can the Second Cardholder be added? (must be in person by first cardholder)
  - v. When can a WIC staff person be a eWIC cardholder? (only if participant)
  - vi. What appointments can a second cardholder bring a child to? (all)
  - vii. Which cardholder(s) can transfer a participant or discontinue WIC services? (only first)
  - viii. Who can access eWIC account information? (both)
- j. **Workbook p.5** : Enter 1<sup>st</sup> cardholder data from activity sheet
  - i. Relationship field is optional – but agencies wanted a way to tell how the cardholder was connected to the family. How might you use this field?
- k. Type in eWIC card number from the virtual card number list and save (note on sheet if want to keep track, but tracking on paper in real life is not required.)

- i. Will be able to swipe real cards – we will show you this in a later activity
- ii. Card numbers are not random or sequential
  - 1. eWIC cards have sixteen digit numbers
  - 2. The first six numbers are all 610287. This indicates it is an Oregon eWIC card
  - 3. Next 9 numbers are the actual card number and are in sequence
  - 4. Last digit is a “check digit” that is used by the banking system to make sure it is an authentic card number and not fake.
- iii. Once assigned, card number can’t be changed so turns gray and has a status of active.
- iv. **\*Remember from your pre-training review, the eWIC card is not a valid proof of ID for either cardholder. Same ID requirements policies still apply.**

- l. Look at Card History pop-up after addition of card so can see how it tracks everything, including the name of the WIC staff person who issued the card.
- m. Use activity sheet to add optional 2<sup>nd</sup> cardholder.
  - i. Blank until you click the Add 2<sup>nd</sup> Cardholder button.
  - ii. Use the Copy First Cardholder Address button.
  - iii. We won’t see the ID of the 2<sup>nd</sup> cardholder since give to 1<sup>st</sup> cardholder
  - iv. 1<sup>st</sup> cardholder is responsible for teaching the 2<sup>nd</sup> cardholder about card use and shopping with eWIC,
  - v. Since they have access to benefits select your 2<sup>nd</sup> cardholder carefully.
- n. The second cardholder will have to use the zip code and birthday associated with that card, so make sure cardholders are aware of that.
- o. With 2 cards, cardholders have to make sure they know which is which. During Pilot, they started using a sharpie to write #1 or #2 on the cards to keep track.

**4. A for Assign benefits - Checking the food package assignment and saving the correct one.**

- a. Select the Family member, then fast path from FCS to Certification, Infant/Child then FPA tab.
  - i. Rule – if agency is converted will go to the new FPA
  - ii. **Must go to the FPA for every participant during conversion and save the new food package in order to issue eWIC benefits.**
- b. Compare eWIC FPA with old FPA
  - i. How does the new FPA compare with what you are used to seeing?
    - 1. Most things are the same
    - 2. Still ABC modules
    - 3. Still defaults to the Standard package
    - 4. Still row for each month
- c. Basics of assigning a non-standard package.

- i. If you need a non-standard food package, in eWIC you have the option to select a different template from the drop down. With milks, you then can select the quantity from the quantity drop down. Most of the time, the Standard Food Package will be the correct one, but the templates allow you to easily select the common alternatives or adjust amounts.
- ii. **Handout p.7-14** –Food Packages and Template Codes job aid (FP Module)
- iii. Modules (ABC changes) – what is in each? How would you guess the template and quantity work?
  - 1. In module A, templates tell you the type of milk and the quantity column tells you how much.
  - 2. In module B, templates provide the most common non-standard combinations.
- iv. Quantity assigned drop down is separate from the milk or formula templates/codes drop down. Each can be selected separately. You still look at both together to see what has been assigned.
- v. In most cases, the food package will convert and when you combine the code with the quantity will look very similar to what you are used to seeing now.
- vi. **Handout p.15-19** – Standard Food Packages job aid (FP Module)
- vii. Standard food packages will convert.
- viii. If you want to change the assignment, start by looking for another template or changing the quantity – review job aid
- d. New fields, codes and buttons
  - i. **Handout p.21**: FPA Screen Codes
  - ii. Fields moved to the right side – Med Doc, Partial, Status. These will be covered later.
  - iii. Instead of voucher printing codes you will see benefit issuance codes to the right
  - iv. New buttons will get reviewed later

**NOTE:** If training on or after the 20<sup>th</sup> of the month you will see a partial food package and check mark, can uncheck partial to see the full benefit.

- e. Conversion issues
  - i. **Slides 3 - 5:** Slides illustrating truncated FPA
  - ii. When you are converting a participant, there are 2 main things you are looking for when you go to the FPA after conversion:
    - 1. To see what month they will start with eWIC benefits
    - 2. To see if the food package they are issued converted and is correct.
  - iii. During conversion, the FPA is split into two parts – the voucher months stay on the old and the eWIC months are put on the new FPA. That is how you can tell which month is their conversion month. This is checked for the whole family, so even if this participant doesn't have vouchers printed, if anyone in the family does it will keep the voucher rows on the old FPA.
    - 1. Only eWIC eligible rows will show on new FPA

2. Only voucher rows will show on the old FPA
  3. **Impact: vouchers get dealt with on the old, and eWIC issuance is handled on the new. You can't mix months/rows between eWIC and vouchers.**
  4. Can toggle between old and new FPA to see what was issued before
  5. **Vouchers that need correcting – use old FPA**
  6. **eWIC benefits that need fixing – use the new FPA.**
- iv. To see if the eWIC food package assignment is correct: Look for clues-
    1. Standard FP will convert. Specials and IB may not convert.
    2. **Slide 6-7** - Any module that can't convert will show "Z-fix-it" on the FPA and must be changed in order to get new foods. A CPA will need to do this.
    3. Use the old FPA screens to find out what FP was assigned so you can find an eWIC package that works for the family.
    4. You can change the new FP assignment if needed at this point.
  - f. Save Food Package
    - i. Must save the new FPA in order to issue eWIC benefits.
    - ii. **Must save before doing other things that impact the participant's food package – like category change.**
    - iii. Assignment on the FPA does not send benefits to the banking contractor to make them available when the cardholder shops. Issuance on the FSS is the process that sends info about months of benefits to make available to the cardholder to the banking contractor.
  - g. Any WIC staff person can see if the food package that TWIST converted the participant to is the same one they had before. Any staff person can save the FPA so that benefits can be issued. Only a CPA can make changes to a food package. So there needs to be a CPA available to have review any food packages that are in question.
  - h. Use FSS button to navigate to new FSS
    - i. Once a participant has been converted on the new FPA, the button will take you to the new FSS.

## 5. B is for Benefits issued - Family Summary Screen (New FSS)

- a. Let's take a look at the New FSS – what do you see that is the same or different than the FSS you are used to? If not mentioned include:
  - i. Labels changed to remove references to vouchers
  - ii. New buttons- Issue Benefits, Benefits List, Formula Warehouse
  - iii. Cardholder fields
- b. Conversion issues
  - i. Unlike in our practice database, you will see a line somewhere on the screen that says "EBT" when you are converting participants at your agency. This is the dividing line between all things vouchers on the old FSS and all things eWIC on the new FSS.

## **1. What does that mean? Vouchers get issued on old FSS, eWIC benefit issuance on new, and the two never mix**

- ii. If you need to see the old FSS screens, just click the button.
- iii. The old FSS has a button for the new, so you can come back.
- iv. Fast Paths and dropdowns from elsewhere in TWIST will list both with the old FSS marked by “(old)” in parenthesis.

### **v. Slides 8-9**

#### **c. Benefit issuance basics**

- i. Benefit issuance happens the same as voucher issuance, by reviewing check marks and clicking the button.
- ii. You can limit the issuance by using the Set issue months.
- iii. When you click the Benefit Issuance button you will notice that there are words that show – “Issuing benefits. Please wait.” This shows during the time that information is sent to the banking contractor and a message is sent back confirming the issuance. Only then will the check marks be replaced by the code that indicates issuance – BI.
- iv. The other codes that might show similar to now – M for mismatch, R for med doc required, E for eligibility pending.
- v. We will talk about the Remove and Formula warehouse buttons and functions later

#### **d. New Cardholders fields**

- i. “Why is the cardholder field important at this point?”
- ii. Without a card, issued benefits can’t be used. Provides another opportunity to make sure a card has been issued.
- iii. If you start at the FSS, this will tell you what has happened.

## **6. E is for Educate - Printing a benefits list**

- a. Click on the Benefits List button to see the report that shows what benefits have been issued. You can use the buttons to switch between English and Spanish.
  - i. For all other languages, if call Customer Service line and do not make any selections it will move you to the live customer service representative. The CSR will then use the language line to provide the necessary services such as benefit balance.
- b. While it is the family’s choice to just view the list (you run and show online) or to take a printed copy, we expect that you will print one for all families initially and always print out the benefits list for new families, or families with special situations (eg. Formula warehouse, change in category)
- c. **Handout p.23-24** – Helping Families Use the Benefits List – Types and Units of Food job aid (TTM)
- d. Use the critical thinking questions on the job aid to explore how they would use the information to help the family
  - i. **Handout** – baby food 1/3 sheet

1. OZ of baby food equivalent in jars
- ii. Items that might be highlighted? We encourage highlighting of any special formula or other item to draw attention.
- iii. When list was printed (may have spent since then or assignment changed)
- iv. Cardholders assigned (place to double check and see if changes needed)
  - v. Benefit months (Current month only one available to purchase immediately, so has the FDTU and LDTU for this and future months)
  - vi. Family members (did everyone get issued for each month?)
  - vii. How much of each food category (combined for family)
  - viii. Food description (Similar to receipt, connects to Food List)
  - ix. Unit (of measure, how food purchased, see Food List) – see the back of the Benefits List JA
  - x. Next Appointment (When to return to clinic, hand written in on printed copy, whatever makes sense for family and clinic situation)
- e. Return to FPA (blue door) and show BI issuance code
- f. **Handout p.21** – FPA Screen codes job aid – to show Food Benefit status codes

## 7. E is for Educate - Shopper education

- a. Resource – Participant video on shopping. What do you remember about this video?
- b. Review Shopper Education resources
  - i. **Resource** – How to shop with your eWIC card brochure - walk through what is on each page
  - ii. **Resource** – Cardholder brochure
  - iii. **Resource** – Folder example with Food List and receipts
- c. Which part of this information do you think would be important to share with families? How does this fit in with what you currently share about shopping? How does it work with the food list? If not mentioned, include:
  - i. **Slides 10-12**
  - ii. To shop will need: eWIC card, PIN, food list, benefit balance
  - iii. Know how to access benefit balance and track balance – WICShopper App
  - iv. Same rules for food list still apply – minimum sizes, etc.
  - v. **Use eWIC card first** when paying– super important!
  - vi. New for cashiers, just like participants – don't expect them to be experts when they first go. So tell them it is a WIC transaction first until everyone gets used to it.
  - vii. Food they used to get, may not really be authorized. May want to use the WICShopper App to check a food if it doesn't look as eligible. Also, check at the mid-transaction point, before done to make sure what you think is WIC is actually being paid for.

**Break**

### Activity 3 – Converting a Family to eWIC

“In our last activity, we saw a single participant come in with a scheduled appointment. In this activity we are going to see a family with multiple participants who missed an appointment and need benefits issued for this month. Activity Sheet 3 says we will be working with the Bates family – Sophie is a pregnant woman and she has a 1 year old child, Brittany. Brittany needs a special or non-standard food package. Whereas in Activity 2 we started from the Family Cardholder Screen, in this situation we are going to start from the Family Summary Screen and will wait for the card issuance until after we issue benefits – just so you can see we can do it either way!”

#### 8. Search for family from the new FSS to check if the family is EBT converted.

- a. **Workbook p.7** – Converting a Multiple Participant Family
- b. Use the button to switch to the old FSS. If need to, can look at old FSS to see what has already happened. Back to New FSS
  - i. You will notice that there is nothing here because we haven't saved an eWIC food package on the FPA. This is your clue that you need to go through the ABCDE conversion steps such as signing the rights and responsibilities, Checking and saving the new food package for each family member, Issuing benefits, Assigning a cardholder and an eWIC card
  - ii. Where does your agency plan to hand out the Participant Signature form and Rights and Responsibilities in this situation?
- c. Remind that the “Old” FSS button is a fastpath, so have to blue door back to get to original screen.
- d. Fastpath from new FSS to Child Cert Screen then tab to FPA – Brittany

#### 9. A is for Assign benefits for child. - Complete the Food Package Assignment Screen (New FPA) for child Participant - Brittany - brings in a Med Doc for a Non-standard package

- a. Conversion issues – what do we see?
  - i. Truncation –vouchers ended last month, so new food package shows for this month forward.
- b. This is a situation where you are issuing a **non-standard food package**, so you will be selecting different templates and quantities from the drop downs.
- c. You would first review the physical Med Doc form from the HCP to see what changes are needed to the food package. The HCP wants one container of Pediasure RTF per day and the supplemental foods except eggs.
- d. Mark her as special to activate Module C.
- e. In Module C, select a template for Pediasure and select the amount that is closest to what the doctor wants. Since Pediasure comes in 6 packs it shows in increments of 6. Usually you would round up to ensure that they get one per day – so select 36.
- f. Select a Module B template without eggs.

- g. Forecast new modules for the remainder of the cert period using forecast function after making sure it is correct.
- h. Show Row summary function to see what has changed.
- i. Put the cursor in the first row needing Med doc and click the Med doc button.
  - i. Completion of Med doc is the same except that marking foods to be excluded will not prevent them from being assigned in Module A or B. It is just documentation of the exclusion request. RD's can also determine exclusions if HCP indicates on Med Doc. Exclusions will have to happen by CPA selection of food modules/package.
  - ii. Note that the Med Doc indicator is at the far right now.
- j. Save Brittany's FPA and go out blue door to go back to FSS.

**10.A is for Assign for Mom. Fast path from FSS to Food Package Assignment Screen (New FPA) for woman participant – Sophie says she doesn't want as much milk.**

- a. Assign a non-standard package by using Quantity assigned fields to decrease amount of milk issued
  - i. Drop down for increments and then use arrow keys to get amounts between the increments.
- b. Forecast module A
  - i. Review Row summary function
- c. Save
- d. Add Progress note to document why Sophie is not getting maximum food package.
- e. Standard and non-standard food packages can be forecast.
- f. Go out blue door to return to FSS.

**11.B is for Benefits Issued from the Family Summary Screen (New FSS)**

- a. Notice that you do not see reduced quantity of milk on the FSS and you do not see the quantity of Pediasure.
- b. Check boxes are the same – can uncheck to determine months to issue
- c. Issue benefits
- d. Note that we do not have any cardholder showing.

**12.E is for Educate - Run Benefits List and review on screen**

- a. Benefits combined for family – What do you notice about the combined benefits? Most foods together – 2 different milk rows and juice rows indicate the difference between Sophie and Brittany's food package.
- b. What do you think would be important to point out to this family?
  - i. How much of each category
    - 1. Two kinds of milk show separately since must buy the correct type
    - 2. Two kinds of juice show separately
      - a. Note about Juice – one is for 12 oz frozen only, while the other is for 64 oz plastic bottle OR for 16 oz frozen (orange only.) This is a

change from what folks are used to, so should be pointed out. It is mentioned in the “How to Shop” brochure on the Buying Juice page.

- ii. Units of measure, fractions of gallons
- iii. Months issued
- iv. When to return
- v. Current month only one available to purchase (FDTU, LDTU)

### **13.C is for Cardholders and Cards - Fast Path to Family Cardholder Screen (FCS)**

#### **a. Hand out plastic cards**

- b. Add 1<sup>st</sup> cardholder
  - i. Make note of zip and DOB for PIN set later
  - ii. Use card readers to enter card numbers in the field
  - iii. Put the cursor in the card number field and swipe the card,
  - iv. Save.
- c. Answer any questions about card readers – plug into USB port and wait for the green light

### **14.E is for Educate - Review PIN Set and card management**

- a. **Resource:** Participant Video on PIN set. What do you remember from the video?
  - i. **Handout p. 25** – Shopper Function Cheat Sheet
- b. PIN security- setting a PIN that is easy for you but hard for others don't share with others, no one will ever ask
- c. PIN set via phone
  - i. Need card #, DOB, and zip code
  - ii. Can change PIN, listen to current balance and transactions
  - iii. Customer service phone line (IVR) is the fastest way to set PIN
- d. PIN set via Cardholder website
  - i. Need card #, DOB, and zip code
  - ii. Can change PIN, view current balance and transaction history (need card # and PIN)
- e. PIN set issues
  - i. Must match the cardholder assigned to that card
  - ii. DOB English = mm/dd/yyyy. DOB Spanish = dd/mm/yyyy
  - iii. Can only use 5 digit zip, not plus 4 (may need to remove in TWIST)
  - iv. Phone used must be “tone enabled”, so may need to try another phone.
  - v. Cardholders need to feel empowered to deal with the website or customer service phone line, and PIN needs to be private – so if you need to provide any assistance in your agency, have them use the phone and enter PIN on own.
  - vi. If don't speak English or Spanish, not selecting anything will take them to a CSR that will get a language line to help them.
  - vii. Customer Service staff will only talk to cardholders, not WIC staff.

- f. Card security –
  - i. You may want to write WIC ID number on signature strip on back of cards, it can be found on the FCS – don't have sign the card, don't write PIN or other info on cards
  - ii. May want to put #1 or #2 to clarify which card goes with which cardholder.
  - iii. PIN set should be different for the 2 cards so if deactivate a 2<sup>nd</sup> cardholder they aren't able to use the 1<sup>st</sup> cardholders card.
  - iv. safe place, keep away from magnets
- g. Have everyone set the PIN on their card
  - i. For training we have a special customer service line that takes a couple of extra steps – use the instructions for setting a PIN for practice on p. 9.
  - ii. Can use state cell phones for folks that don't have their own
  - iii. Encourage them to program customer service line number into cell phone and suggest they have participants do the same thing.

### **15.Preparing to Shop – Basics of what to do at store**

- a. Slide 13
- b. Describe how Shopping will work in the Training Environment.
- c. Need to have your card and PIN. Use the info in the workbook on P.9 to make sure you buy enough Pediasure and other foods.
- d. Group can shop before or after lunch (try to split large groups to minimize time involved)
- e. One of the trainers will be the cashier for you when you are ready to check out.

### ***Lunch – Trainers be sure to PIN and shop for demo participant***

### **16.Shopping practice** (start having folks shop as they return from lunch).

- a. Use food models and POS device to practice shopping

### **17.Checking benefit balance**

- a. Review the receipt from shopping and talk about how it is different from the benefits list printed earlier.
  - i. Consider saving receipt for participant education
- b. Discuss reading receipts – What are some things that might be confusing on the receipt
  - i. Benefits purchased versus benefit balance at bottom of receipt
  - ii. Differences between stores receipts
- c. Available balance - 5 ways to check benefit balance
  - i. Resource – participant video on ways to check balance - what do you remember from the video?
  - ii. Customer service line, cardholder website, Receipt, store customer service, WICShopper App

- iii. **Remaining balance in amount not in dollars** (decimals are deceiving)
- d. **Practice** – Call customer service line to hear balance after shopping  
**Log** onto ebtEdge web portal to check balance.  
<https://www.ebtedge-at.com/gov/portal/PortalHome.do>

## 18. Review of morning

- a. Ask “What do you think are the most important points to share with a participant about shopping and using the card?”
- b. Things you might hear about shopping:
  - i. **Slides 14-16**
  - ii. Reasons why can't buy something
    - 1. not enough balance,
    - 2. not an authorized food,
    - 3. not assigned-e.g. wrong milk fat,
    - 4. Store clerk cannot override this!
  - iii. Changing or resetting PIN, PIN lockout after 4 attempts
- c. **Handout p.25** – Shopper Ed cheat sheet
- d. Practice providing shopper ed and use of card with each other using the resources available

## Activity 4 – Cards and cardholders, Food Package Modifications, and Formula Warehouse

“As we know, things change with our families fairly frequently. Food packages change, formulas change, and sometimes families change. In this activity, we are going to explore how you can make all kinds of changes on the Family Cardholder Screen and then we are going to look at how easy it is to modify food packages in the eWIC world. For this Activity, we will use the Tidewater family from **Activity 2** where we issued formula. Start on FCS and search for Julie Tidewater from your agency.

## 19. Review Family Cardholder Screen Actions

- a. **Workbook p.11** : Cards, Cardholders, Food Package Modifications, and Formula Warehouse
- b. Point out buttons available on this screen.
- c. Demonstrate how to FastPath to Client Master Demographics to change first cardholder address. Save and go out the blue door. This is the only way to update the first cardholder.
  - i. Automatically updates on FCS.
  - ii. Will notice that it doesn't change the 2<sup>nd</sup> cardholder address.
  - iii. Current address is important since the zip is used for security purposes.
- d. Click button to copy first cardholder address to second cardholder.
  - i. Can leave different if needed, since 2<sup>nd</sup> cardholder also needs DOB and zip for security.
- e. Remove 2<sup>nd</sup> cardholder- all privileges are revoked when card status is cancelled.

- i. You can update the name if that changes, but you cannot change the owner of the card to a new person. The old one must be removed, then you can add a different 2<sup>nd</sup> cardholder and card if needed.
  - ii. “Cancel – Restrict Access” means that cardholder and card cannot access anything (IVR, web, benefits, WIC)
  - iii. The first cardholder can remove the 2<sup>nd</sup> cardholder, but the 2<sup>nd</sup> cardholder cannot remove the first.
  - iv. Can do this via customer service line or WIC office
  - v. This may happen often with our changing families
  - vi. New cardholders can only be added at the WIC office, this cannot be done by banking contractor via IVR or webportal.
  - vii. Note that the buttons for the 2<sup>nd</sup> cardholder go away when the cardholder is removed.
- f. Review Card history pop-up to show the record of changes made.
- g. Replace 2<sup>nd</sup> cardholder.
- i. Second cardholder address may be a copy of the first cardholder’s address, or you can type in a different address here from the activity sheet.
  - ii. You will notice that the zip code doesn’t generate a city like it does in other TWIST address fields.
- h. Change 2<sup>nd</sup> cardholder to 1<sup>st</sup> cardholder.
- i. 2<sup>nd</sup> cardholder assumes address from Client Demographics. May need to update address.
  - ii. Card number stays with 2<sup>nd</sup> cardholder when they become the 1<sup>st</sup> and the PIN remains the same.
- i. Card history – review changes with cardholder.
- i. Card holder status is different than card status.
  - ii. Card history remains for 6 months so that you can see what has gone on.
  - iii. If a cancel-restrict access card or card number is used, you will get a message that tells you that card is invalid.

## **20.Using the Card Action buttons.**

- a. We anticipate that people will occasionally need to have cards deactivated and or replaced. Cards are cheap and it is relatively easy to do this. Since the use and security of their benefits is tied to having a card we want to make sure they always have at least one valid card. There are three reasons to deactivate a card in TWIST:
- i. Stolen – for obvious reasons – can just report this, they don’t need a police report.
  - ii. Lost/unavailable – same
  - iii. Damaged – for whatever reason the card doesn’t work.
- b. There are two options for doing this in TWIST:
- i. Deactivate and Replace – means you are going to actually replace the card at that time.

1. Only contractor can mail – must speak to live customer service, takes 5-7 days to arrive
  2. WIC Clinic can issue over the counter – only available during clinic hours.
- ii. Deactivate – means that you simply make the card unusable. This keeps the benefits associated safe. For example, over the phone but not there to replace.
    1. We want people to deactivate their card ASAP so they don't lose benefits.
- c. Deactivate and replace a card
  - d. “Deactivate” a card. Once card is deactivated, the only option on the Card Action button is to replace.
  - e. Card status shows on FCS. FCS is the only place that you can get info about what has happened to the card. So on the FSS and Benefits list, you might see a cardholder but you can't tell if they have an active card or not.
  - f. Show Card History
    - i. Notice the difference between an active cardholder with an inactive card versus an inactive cardholder with a cancel-restrict access card status.
    - ii. Notice the user ID of the person who does this, will show the ID of the banking system if done via IVR or web.
    - iii. Part of program integrity is monitoring the frequency of card replacement. The state will get reports of frequent replacement from the banking system and will follow up as needed.
  - g. Any questions before we move to the FPA?

## **21. Modify Food Package on FPA Screen (Fast path from FCS)**

- a. Select the participant and then fast path from the FCS to the Cert screen. Select the FPA.
- b. **Handout p.21** – FPA Status codes J A to review the benefit issuance codes- BI, U, FR, FX
  - i. You can see that the Benefits have been issued and none are spent – no \$ sign.
  - ii. Unlike with vouchers, you do not need to void or remove benefit issuance prior to modification
- c. Click on FPA dropdown first to see if there is a non-standard template available for the new formula.
  - i. Templates chosen from the dropdown can be forecasted.
  - ii. Food packages that are modified using the Modify button need to be manually assigned for each month.
  - iii. In this case, no template is available.
- d. Modify function basics
  - i. Use Modify button to select a formula with no template
  - ii. Explain how the screen works.
  - iii. **Handout p.27-28** : Modifying Food Packages job aid (TTM)

- iv. Reduce the amount of the original formula as low as it will go.
- v. If any spent it would give an amount you can't go below. In this case, go to zero.
- vi. Add a row. Only foods the participant is eligible for will show.
- vii. System automatically checks for maxes and does all the math.
- viii. If no formula or milk spent, can just select a new formula or milk and save change to update on the FPA.
- e. Note that "modified" is displayed in Module A indicating that a change has been made. Cannot forecast a modified template. Have to enter for each row. Make change to 2 rows.
  - i. Note changes of benefit status
- f. Row summary function – summary of changes made to each month's benefits.
  - i. Shows who and when each change of food package occurred.
  - ii. Shows the math of what was added or subtracted.
- g. Return to Modify screen, and add another row for formula.
  - i. Demonstrate how to assign two different formulas.
  - ii. Show how the amount available in one row impacts the amount available to select in the other row. TWIST does all the math.
  - iii. Click "Cancel" to return to the FPA without making any changes to the food package.
- h. After a modification, you must reissue on FSS.

## **22. Issuing formula from the Formula Warehouse from the FSS**

- a. Use the FSS button to go to the FSS to re-issue formula.
  - i. Shows ready to re-issue (check boxes back)
  - ii. Issue the benefits
- b. Use of the Formula warehouse function- replaces Providence order forms
- c. Select client on the FSS, then click on Formula Warehouse button
- d. Basics of completing the FW pop up
  - i. Complete for each month want FW
  - ii. Selecting addresses for shipping
    - 1. Shows all addresses in client master, clinic addresses, and option to enter another.
    - 2. Show what happens with dot box in the middle.
    - 3. Be careful about adding another address in CM, since it impacts appt letters.
  - iii. Selecting flavor/fiber- some formulas will have options for flavors and fiber content. All available options will show in the drop down. Can insert rows in FW order screen for these.
    - 1. Option for issuing more than one type is by inserting a row and adjusting the amounts between the two rows.
  - iv. Quantity issued displays.

- v. Note field is anything that you want Providence to know because all info on this pop-up goes to them. Other notes should go in the Progress Notes.
- vi. Can be done before or after issuance, but both parts have to happen so we recommend that you issue first.
  - 1. All formula warehouse possible months have to be completed on the pop-up, so don't put FW options in TWIST for future months if you aren't going to order them from the warehouse at this time.
- e. The FW button will show an "!" if an order is present.

### **23. Benefits list will show a FW indicator**

- a. FW will show immediately to the right of the formula ordered from formula warehouse. Discuss the importance of not attempting to buy the formula elsewhere; this will impact the FW order.

### **Activity 5: Food Package Modification and Formula Exchange**

“Food packages are changed for many different reasons. With eWIC, these changes are easier than with vouchers, even if part of the benefits have been spent. For this activity, we will go back to the Bates family from Activity 3 and make some modifications after benefits have been spent, in this case a mom who wants a different milk and a change in formula for the child. Modifications can be made to unspent benefits even in the current month.”

### **24. Modify food packages when benefits have been spent. Mom is switching to soy beverage.**

- a. **Workbook p.15**: Food Package Modification and Formula Exchange
- b. Search for the Bates family from the FSS
  - i. When you look at the Benefits list you can see the combined remaining benefits available. Milk, cereal, Pediasure has decreased from original issuance, but is still combined for Sophie and Brittany. Next month's issuance is the same as when we looked at it earlier. Your receipt should reflect the difference.
  - ii. Fast path to Sophie's certification and then select the FPA
  - iii. Point out \$ in Status field.
- c. Click on the Modify button to see the details
  - i. Show that max benefit is what was originally assigned/issued. When you use the drop down on the milk and the cereal, you will see that bottom number will show the amount that is spent or TWIST calculates what is the spent amount of how the benefits have been separated between Sophie and Brittany.
  - ii. Impact of separating combined benefits between family members when you need to modify a food package – who gets what is based on a percentage of what was initially issued to the participant in units that can be purchased. For example, if two family members were issued 36 ounces of cereal each and 20 ounces is spent, the remaining cereal will be split between two members in 18 ounce amounts, but any odd amount will go to the higher priority client.

- iii. Luckily, TWIST does all the math, so you don't have to worry about the amounts.
- d. Change the remaining milk to soy, by reducing the amount of cow's milk to the lowest amount which is the amount spent. Insert a row, search for soy and click ok. TWIST considers the amount of milk benefit already spent so the amount you can issue of soy is calculated by TWIST and you cannot exceed the max benefit available.
- e. This month becomes a modified row because two different milks were issued in the same month.
- f. In next month's row, you can select a template for soy that can be forecasted.
  - i. What does modified package look like on FPA?
- g. Because the food package has been updated you need to return to the FSS to reissue it. What does Sophie's package look like on the FSS? Let's wait to issue it until we find out what is happening with Britany.

## 25. Formula exchange and replacement (policy) to change Britany from Pediasure to a different formula.

- a. Sophie has brought in one six pack of the Pediasure along with updated med doc from the provider to change to Boost Kid Essentials.
- b. Select Britany and fast path to the child cert screen, select FPA
- c. You would start by dealing with the formula that is being returned.
- d. Click on the FR/FX button- this function deals with either replacing formula when there are no cans to exchange or exchanging returned cans of formula.
- e. Let's look first at the Formula replacement function. **Don't use it, just look!**
  - i. You would use the Formula Replacement function when spent cans are not available to the participant- stolen (with police report or report #), DV situation, custody issues, natural disaster or fire. See Policy 561.
  - ii. Just like we had the Lost and Stolen report, you still need to fill out a form that the cardholder would sign in order to do this. This form is available online. You only have to do this for Formula Replacement.
  - iii. **Handout p. 29** – Replacing Stolen/Unavailable Formula form.
    - 1. This form gets sent in to the State office.
- f. In this case, we have formula being returned so select Formula Exchange.
  - i. Use this function when some formula has been spent and participant has cans they would like to exchange for another type of formula.
  - ii. Return one 6 pack – the other is used. You will notice that just like the other quantity fields you can use the arrow key to get the exact number of containers returned (e.g. the 6 pack was not complete).
  - iii. This adds that amount of formula back into the balance to be used. TWIST does the math and adds the ounces of formula back in to calculate how many containers of a different type of formula can be issued.
  - iv. Note the FX status code on the FPA.
- g. Open the modify pop up for this month and take a look at what formula is available.

- i. Reduce the amount of Peditasure to the amount spent.
  - ii. Insert the row for Boost Kid Essentials.
  - iii. You will notice that rather than the 36 containers you assigned for Peditasure, you can select up to the maximum available to this participant. So you need to use the med doc to determine and select the appropriate amount to issue just like before. Save.
- h. Go to the next row to select the appropriate formula template and amount in module c, then forecast for the remainder of the cert period.
  - i. Update the med doc as needed.
- j. Return to the FSS
  - i. Issue the new benefits and review the Benefits List.
  - ii. You will notice the new amounts available to spend and that things are re-combined as before.

## **26. Removing future benefits that have been issued**

- a. In most situations TWIST will remove the appropriate benefits for you. It isn't like vouchers where you have to void them. Sometimes you will find that you have issued the correct benefits but you just wish you hadn't. It could be just an oops when you are trying to coordinate appointments. It could be based on something like overdue lactina. You can only remove the current benefit issuance if none of them have been spent.
- b. To manually remove issued benefits use the Remove button on the FSS and select which benefits to be removed. Select a reason and click okay.
- c. These can be reissued anytime and you see that the checkboxes on the FSS reappear as soon as you finish on the remove pop-up.

## **Activity 6 –Miscellaneous (including policy issues)**

In this last section before we wrap up we wanted to review the miscellaneous policy issues that you have asked about today or that we want you to be aware of before you go back to your agency. For this section we don't need TWIST or the computer.

See Slides 17.

## **27. Automatic change of issued benefits by TWIST**

- a. Slide 18
- b. When you change categories or designations, TWIST will automatically remove or add the correct benefits. So all you have to do is save the FPA so it can be re-issued.
- c. Slide 19
- d. Handout p.31-32: Termination Reasons and Benefit Issuance
- e. When a participant is terminated, the system will determine which benefits to remove based on their termination reason. This handout shows you whether current benefits or future benefits are removed in each circumstance.

- f. You will notice that the first half of the reasons are ones that happen automatically in TWIST, like a child turning 5 or a woman at one year postpartum. The job aid tells you when in the month each of those automated processes occurs.
- g. The other half are the termination reasons that you would select when you manually terminate a participant.
- h. Refer to Policy e511, Food Benefit Issuance.

## **28.Changing vouchers after clinic converts**

- a. Slide 13
- b. Remember vouchers and eWIC don't mix. It is either a voucher month or an eWIC month for everyone in the family. A family may have vouchers for up to 3 months after your agency converts. So they may need to change the food package during that time. You can make voucher changes on either converted or non-converted participants.
- c. Just remember that you use the eWIC screens to change benefit issuance and the "old" FPA, void screens, and FSS to change vouchers after clinic converts.
- d. They all still work.

## **29.End of Month issues**

- a. When issued at end of month and LDTU is in the following month, what does it look like on balance?
  - i. What will they see or hear on cardholder website or customer service line in that situation?
- b. Slide 21 –Benefits List showing overlapping LDTU and summarizes the issues
- c. Cardholder website and customer service line will show an expiration date for all of next month's benefits as the LDTU for the new month. They will not see the expiration for the previous month's benefits anywhere except on the Benefits list. But after that date passes, any of those unspent benefits will be gone.
- d. This must be pointed out to all participants with new benefits issued in the last 5 days of the month.
- e. Key message to participants – make sure you do that shopping before the expiration date!

## **30.What can you do over the phone**

- a. Slide 22
- b. Handout p. 33-34: What can we do over the phone job aid
- c. Without vouchers to deal with there are many more functions that can be done over the phone. This doesn't change the basic requirements of the program, but does allow some flexibility for participants.
- d. To ensure that the appropriate person is calling to make the requested change, we are asking that you use similar information about the cardholders that the banking contractor would to verify identity (card number or WIC ID, name, DOB, zip/address) before taking any action.

- e. You will notice that there are certain things that cannot be done over the phone. Remembering the comparison of what a 1<sup>st</sup> versus 2<sup>nd</sup> cardholder can do, you will also notice things only a 1<sup>st</sup> cardholder can do.
- f. One thing that will help is when a family misses their second NE appointment, you can reschedule them and if needed, issue one month of benefits over the phone. You still need to follow the same policy as before.
- g. **Handout p. 35-36** – Missed NE Appointments and NE Refusal Job aid (Policy 835)

### 31. Unusual food package issues

- a. There are always strange food packages to issue. Rather than show you how to do that, we want you to know that there are job aids to help walk you through the steps when you need to.
- b. **Slides 23**
- c. Updated Food Package and Intro to WIC modules posted on website
- d. Updated TWIST training manual lessons and job aids posted on website
- e. Job aids available in packet to use if you encounter these situations
  - i. **Job Aid p.37-** Issuing Evaporated and Dry Milk
  - ii. **Job Aid p. 39** - Pregnant and Breastfeeding
    - 1. Change category before use reinstate
  - iii. **Job Aid p. 41** - Assigning Food Packages for Fully BF Twins
    - 1. Modify every other month

### 32. Current or Known Issues

- a. **Slide 24**
- b. **Resource p. 45** – Issues and Solutions document
- c. Most current copy of the Issues and Solutions document will be on the website in the TWIST Training Manual
- d. This will let you know about things that are different, being fixed, or just plain strange. Similar to a troubleshooting document.
- e. Summarize any issues and workarounds as of the training date.
  - i. E.g. unable to issue benefits from the Group NE screen

## Wrap Up, Resources

We know that this training is not going to answer every question you may have. We know that you will need to call App Support to get your TWIST questions answered or issues handled, or you will need to call your NC to talk through policy issues. There are resources available to you.

### 33. Online Resources

- a. **Slide 25** – App support and others (“**Who ya gonna call?**”)
- b. **Slide 26** - eWIC resources posted on website
- c. **Slide 27** - Practice data base for your agency is available
  - i. PDB is refreshed on the 1<sup>st</sup> of each month
  - ii. eWIC card numbers given can be reused on the 1<sup>st</sup> of each month

- iii. Encourage you to use practice data base to review functionality covered in training – try to spend some time keeping the info fresh, so you don't feel panicky that Monday morning when you implement.

### **34. Next Steps**

- a. Identify conversion date. If time permits, discuss agency roll out plan
- b. **Slide 28** - Questions? Remaining items from the “Shopping Cart?”
- c. **Slide 29** - Thank you - Express confidence in ability to go forth and become an eWIC agency!