

**Oregon eWIC**



## eWIC Webinar 12: Lessons Learned from eWIC



Thursday, 12/3/2015 at 9:30



Good morning! Welcome to the final webinar in the eWIC series of training webinars for Oregon WIC staff. In a few minutes we will begin recording this webinar for posting on the Oregon WIC website under “Resources for Oregon WIC Staff” and “eWIC”. This presentation is scheduled to take about an hour. Before we begin, let’s cover a few logistics for today’s webinar.

**Oregon eWIC**

## How to use "Go To Meeting"

The screenshot displays the GoToWebinar interface. On the left, a vertical navigation bar contains icons for Home, My Meetings, and a question mark. A blue arrow points to this bar. The main window has a menu bar (File, View, Help) and a sidebar with a clock showing times from 1:23 AM to 5:00 PM. The main content area is divided into sections: 'Audio' with attendee information (Dial 1-888-751-0624, access code 605568), 'Questions' with an audience question and answer, a welcome message, and a text input field for questions with a 'Send' button. A blue arrow points to the 'Send' button. At the bottom, the session title 'WIC EBT Planning practice session' and Webinar ID '240-532-458' are shown, along with the GoToWebinar logo.

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On the right hand side of the screen you will see the webinar navigation bar. The red arrow will minimize the bar if it is in your way. The question portion will allow you to type in questions and concerns for the organizers. We will be monitoring that information here and responding in the same section where possible.

## Guidelines for Webinars



- If you have technical difficulties, please call 971-673-0040 or type a request in the question area.
- Because this webinar is being recorded, participants will be muted.
- If you have a question, type it in the question area and it will be answered at the end of the presentation.

If you have problems during the webinar, please call the number indicated on the screen or type in a request in the question section and someone will provide assistance if possible. Due to the recording of this webinar, all webinar participants will be muted to maintain the quality of the recording. Questions about the content of the webinar can be typed in to be answered at the end of the webinar. Now, let's get started!

(Press **Start Recording Button!**)

**Oregon eWIC**



## eWIC Webinar 12: Lessons Learned from eWIC Pilot

Oregon WIC Nutrition  
Consultants:  
Vernita Reyna and Cheryl Alto



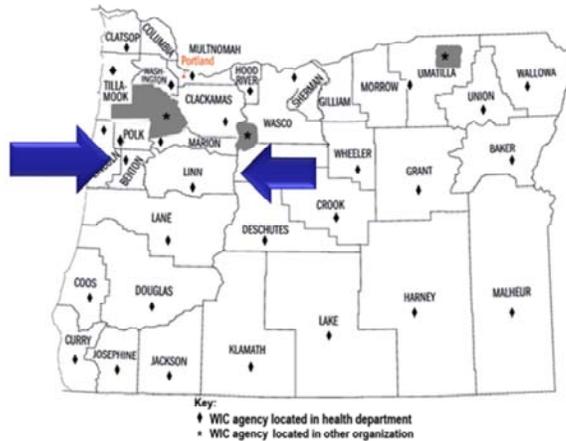
Hello WIC Colleagues! Welcome to the twelfth and final webinar in our series of webinars on preparing for eWIC implementation. Presenters for this webinar are Cheryl Alto and Vernita Reyna, nutrition consultants at the state WIC office. It has been our privilege to be the primary liaisons with the local agency pilot programs and it will be our pleasure to discuss lessons learned from these eWIC pilots. This is Vernita Reyna speaking and I will get us started on our discussion...

## During this webinar we will...

- Review actions to take during preparation for eWIC in the areas of:
  - Staff training
  - Participant education
  - Appointment scheduling
- Discuss factors to consider during roll out in the areas of:
  - Shopper education and the shopping experience
  - Clinic operations

Our objectives for this webinar are to review actions to take during preparation for eWIC and discuss factors to take into consideration during the actual implementation in the areas noted on the slide. We hope the information and insights offered here will help to assure readiness for statewide eWIC roll out in 2016. Let's begin by acknowledging the work that has been done during the pilot process...

## Pilot agencies: Linn and Benton



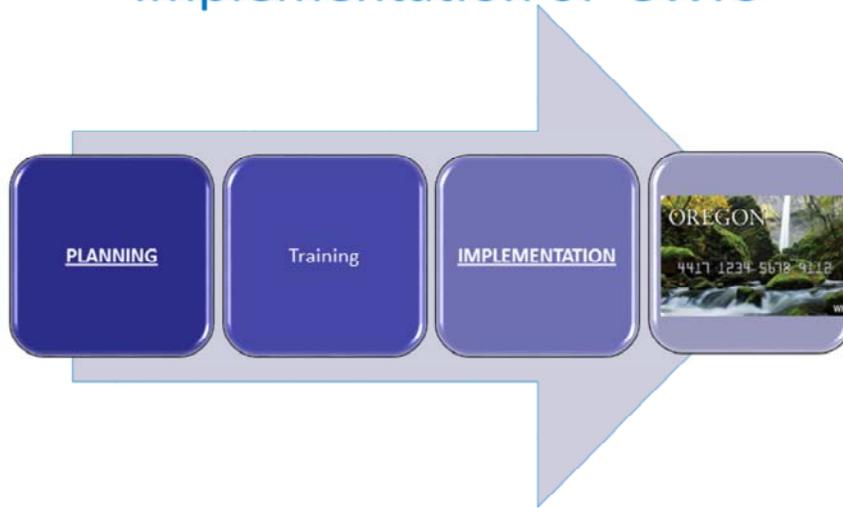
The Benton and Linn County WIC programs are the sites for the three month pilot period that began in September 2015. By the end of November 2015, 85% of the pilot agency's families have been converted to eWIC and these participants have successfully completed over 9300 transactions worth more than \$220,000 in local stores!

Pilot = listen + learn



Staff from Linn and Benton have been communicating regularly with state staff and state staff have been on site to observe eWIC in action. The information in this webinar is a direct result of information gathered with the assistance of the outstanding staff in these two agencies.

## Focus on Preparation and Implementation of eWIC



This webinar will highlight items associated with planning and implementing eWIC. We will not be covering information associated with TWIST functionality as this will be covered in the face to face training that staff from each agency will attend two weeks prior to their roll out date.

## Lots of WIC business is the same...



When visiting the pilot sites, it was clear that many aspects of daily operations did not change. Certifications and nutrition education continued as usual just as seen here at the Linn clinic. Caseload management and participant centered services continue to be top priorities. The key difference, of course, is in the issuance of food benefits.

## eWIC changes

- Data system
  - Conversion in TWIST
- Clinic operations
  - Who completes the conversion, when and where
- Participant shopper education



The issuance of food benefits involves conversion of the participant in TWIST and educating the participant on the new shopping process. The changes in the data system involved with conversion will be covered during regional face to face training. Planning for how the conversion and shopper education gets accomplished is part of the clinic operations discussion that needs to happen before roll out.

What have we learned from pilot  
that we didn't know before?



So lets move through aspects of clinic operations discussions that can help inform decisions that will be made to assure the smooth transition from a paper voucher to an eWIC environment...

## Notify partners of our new way of doing business



The advent of eWIC is an excellent opportunity to connect with community partners and market the many services that WIC offers. News about eWIC can enhance routine outreach activities and encourage referrals to your program. We want families with young children to check out WIC and discover this new shopping experience!

Social media can be useful to get the word out and there are ready made Facebook posts now available on the Oregon WIC website. Local agency websites can be updated with eWIC news. Check out the Linn and Benton County websites for examples. Consider offering interviews to local media. A lesson learned...when working with your agency's communication team or Public Information Officers, it could take up to one month to get a press release distributed...so be sure to plan ahead!

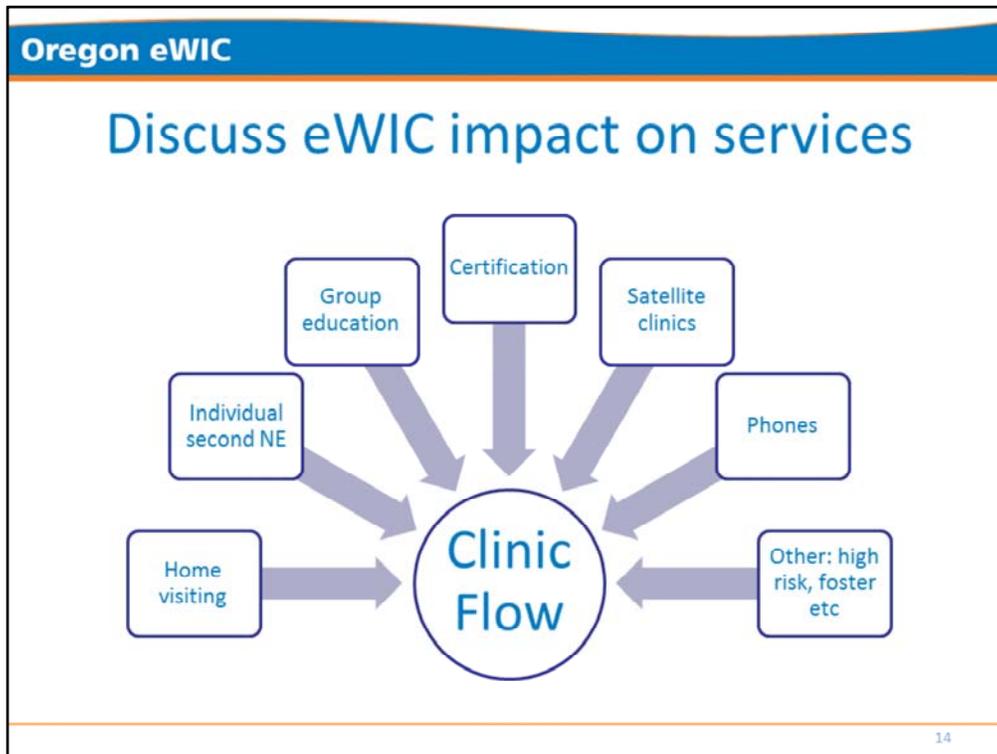
## Review eWIC Policies

- On the Oregon WIC website
- No local agency written procedures required prior to roll out



Another discovery made during pilot was that there was no need for as many new local agency written procedures for eWIC changes as originally thought. Only if you have home visiting staff providing eWIC assistance in the home will a local agency procedure be required. Otherwise, it is fine to just review and follow the guidance in policy!

Contact your local agency nutrition consultant if there are any questions about the policies listed in the Readiness Toolkit or on the website. Of course, it is important to remember that even though specific local procedures do not need to be written for the new eWIC policies prior to rollout...these procedures certainly warrant discussion prior to roll out!



In terms of procedures, our pilots found it useful to think through clinic scenarios as a group. Linn staff processed a lot of this information at team meetings before coming to training, Benton staff worked through their plan following the training. Both approaches helped staff feel prepared for the first day of roll out.

Scenarios that were discussed ranged from satellite clinics to group education, from handling transfers to home visits...any situation where food benefits will be issued in your agency. Considerations for a number of these specific situations are covered in the Readiness Toolkit.

During your eWIC discussions, it is helpful to keep in mind that any staff member can complete the steps needed to convert a participant to eWIC in TWIST and provide shopper education. Linn staff wrote a certification flow to identify exactly who and where in the certification process these actions would take place. Mapping out the process like this might be helpful for your agency also!

Another lesson learned...be sure that equipment like card readers and printers are present at each station where benefit issuance will occur. Check printer connections at locations where benefits lists will be printed in advance of roll out, especially in certifier offices, conference rooms, satellite clinics or classrooms.

## Appointment scheduling

- Lengthen appointments by 5 to 10 extra minutes for the first 2-3 weeks
- 2-3 fewer appointments per day



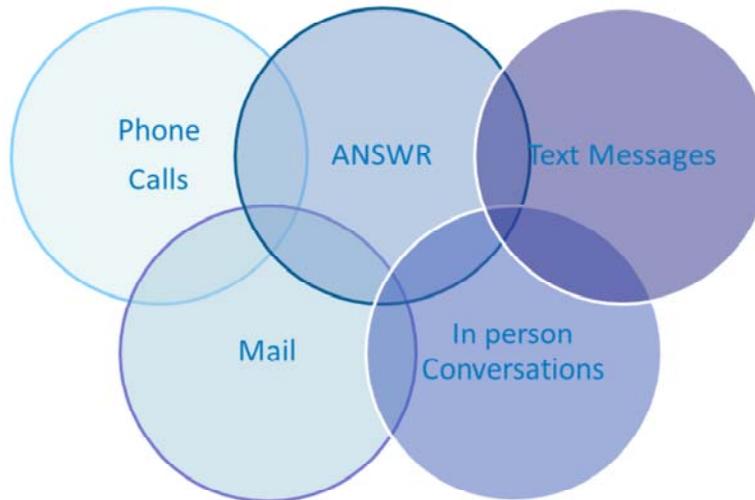
In addition to discussing local agency procedures, consider adjustments to appointment scheduling for at least 2 weeks after roll out. The pilots tried a couple of different strategies that worked for them. These included lengthening certification appointments by 5 to 10 minutes or adding some unscheduled time between every few appointments for catch up. Of course, any adjustments to the schedule must be balanced with caseload considerations to be sure adequate appointments are available. Reevaluate the schedule as needed based on staff comfort with the process.

A lesson learned...all of the steps for conversion in TWIST take about 5 minutes per family (not 5 minutes per participant) and staff became more efficient with practice. The time consuming aspect of conversion is the shopper education. Again, the staff became more efficient with providing this education with practice and found that after 2 weeks, additional time was not as essential as it was originally.

The challenge is that shopper education needs to happen with every family rather than just new enrollments. The length of time needed to complete eWIC shopper ed is about equal to the length of time it takes to complete shopper ed with new participants in the voucher world. In other words, it does not take any longer to educate a new participant on eWIC than it does to educate them on using paper vouchers. So, if new enrollment appointments already accommodate this additional time in your agency, you may not need to change the length of those appointment for eWIC, just be sure to accommodate this education in your schedule for returning participants.

One additional note on scheduling after conversion...food package changes can be made over the phone and participants do not need to come into the clinic since there are no vouchers to be picked up. However, a CPA still needs to be the one to assign new food packages. If a CPA is not the person answering your phones, think about how to schedule time for CPAs to address requests for food package changes.

## Communication with Participants



Our pilots found that lengthening appointments resulted in less appointment availability during the early weeks of roll out. Give participants a heads up regarding this situation at their last appointment prior to implementation. Plan for additional communication with participants during roll out via text, phone calls and letters to help support show rates. Emphasize the need to attend appointments as rescheduling opportunities may be tight. Market this major program change by letting families know that this is their time to begin receiving benefits through eWIC. Their WIC shopping experience will never be the same again!

And now, I'll turn the mike over to Cheryl to talk more about shopping with eWIC...

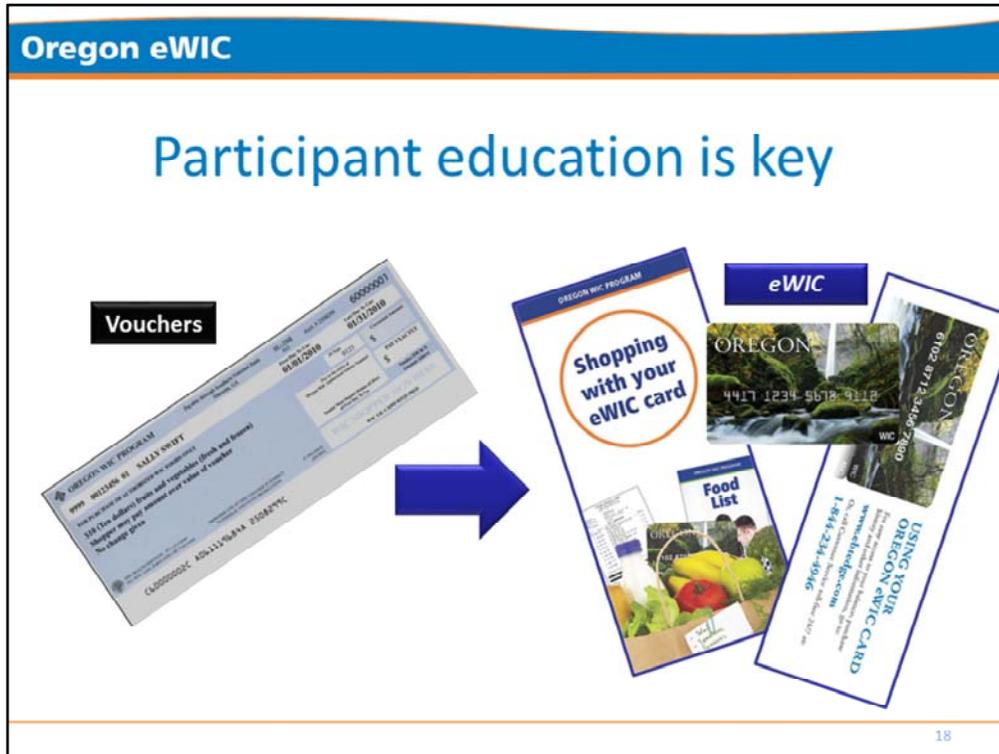


Hi everyone! This is Cheryl letting you know that shopper satisfaction has definitely been evident in our pilot areas! eWIC gives shoppers the option of shopping as often and for as much as they need at any one time. There is no ID required at check out and they get to use a card for payment the same as other customers.

Vendors appreciate the new process as they do not have to monitor WIC transactions for correct foods. Approved items are in the system and non approved items will not scan for WIC purchase.

We've heard that some shoppers are surprised when an item that they reported buying in the past does not scan because it is not actually WIC eligible. (Welches bottled grape juice and Jif natural peanut spread are two examples that were reported to the pilots). There will be a learning curve for shoppers and vendors as WIC purchases become more closely aligned with the approved list of WIC foods.

If a food does not scan but really should be on WIC (a bag of apples for example), the store has a process where they can report that to the state office for review.



In order for the shopping experience to be positive, shopper education will be happening with each WIC family throughout conversion. Shopper ed materials are available to support provision of this important education.

As part of their shopper education, each family will receive their benefit list, and two brochures: *Shopping with eWIC* and *Using your Oregon eWIC card*. It is strongly encouraged that a Food List be offered along with these materials.

The eWIC brochures are printed in English and Spanish and can be ordered from the state. Other languages will be posted to our WIC website for printing as needed. Prior to roll out, each agency will want to determine if there is a need to preprint shopper ed brochures in other languages for their caseload.

The pilots also found that using the plastic voucher holder sleeves were useful for creating packets of shopper ed materials. Maintaining a supply of sleeves could be desirable for this purpose.

## Shopper ed videos can be useful



Shopper ed materials include eWIC shopper ed videos. Consider how these might be used in your agency. For example, this slide shows how Benton displayed the looped shopper ed videos in their waiting room. In Linn County, the individual videos were posted on their shared drive for easy access.

Individual videos can be shown during group or individual education, accessed on the WIC website, viewed on a smart phone, ipad or at a kiosk. First cardholders can be encouraged to use the videos on YouTube when educating their second cardholder.

A staff person in Linn County shared that she used the videos when she had a client that had never used a debit card but otherwise found that she could give the information faster verbally.

## Shopping Tips

- Use eWIC first
- Mid transaction balance
- Checkers are learning too - be patient!



Along with providing shopper ed materials, there have been helpful hints that have surfaced to make the shopping experience easier. For example, another lesson learned was that it is very important to always emphasize “Use eWIC first”. eWIC needs to be the first form of payment used at the stores. Other payments such as SNAP (Oregon Trail card), cash or credit cards are less restrictive and will pay for the WIC foods if used before the eWIC card is swiped. It is helpful for participants to request a mid transaction review to check that everything they thought should be paid by WIC was debited from their eWIC account before they approve the purchase.

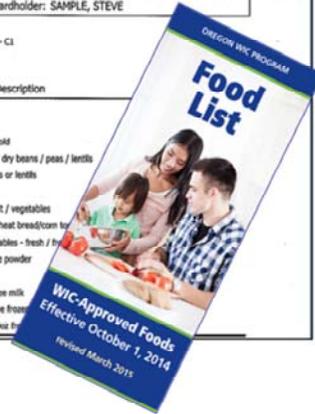
Our recent survey of vendors in the pilot areas garnered lots of compliments for the participant education being done by the pilots especially around the message of use “eWIC first”. Participant shopper education is paying off for shoppers like the Benton County WIC family shown here!

It is important to note that during roll out, checkers are learning too. It takes time for stores to deliver training to every employee so check out may take a few extra minutes in the early roll out period if this is the checker’s first eWIC transaction. Transactions get faster with practice for both checkers and the participants!

## More Shopping Tips

- Balance inquiries
- Minimum package sizes

WIC Benefits List		
Benefits Available as of 03/06/2014 12:54		
WIC Family ID: 2100181		
FirstCardholder: SAMPLE, SARA		SecondCardholder: SAMPLE, STEVE
Benefits for: 3/4/2014 through 3/31/2014		
Family Member/s: Sample, Sara - WB		Sample, Sam - CI
Sample, Suzy - 187-12		
Quantity	Unit	Food Item Description
2	LB	Cheese
2	DOZ	Eggs - large
72	OZ	Cereal - hot / cold
2	CTR	Peanut butter / dry beans / peas / lentils
1	CTR	Dry beans, peas or lentils
24	OZ	Baby cereal
128	OZ	Baby food - fruit / vegetables
48	OZ	100% Whole wheat bread/corn
16	\$\$\$	Fruit and vegetables - fresh / frozen
2	CAN	Similac Advance powder
3.25	GAL	Whole milk
4.75	GAL	Lowfat or fat free milk
3	CTR	11.5 to 12 ounce frozen
2	CTR	64oz bottle / 16oz



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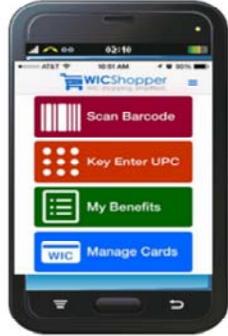
We were also glad to discover that stores can do balance inquiries for participants if they do not bring their benefit list or most recent receipt to the store. It is not the fastest option for checking the balance, but it is available if needed.

Shoppers do need to know that even if there is a balance left on their benefits list, they must still purchase minimum package sizes according to the WIC Food List. In other words, if there is 10 ounces of remaining balance for cereal, a 9 ounce box will not scan for WIC since the minimum container size is 12 ounces. We want shoppers to keep minimum sizes in mind so they do not forfeit any significant balances.

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## WIC Shopper App

- Now available!
- Free from your app store under “WICShopper”
- Check UPC to see if food is WIC authorized



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Another aspect of shopper ed is letting participants know about the WIC Shopper App. The app is available for free at your normal app store. Just search for WICShopper (all one word) and install it.

The app will ask you to select which state you want and it will ask if you want to register your card. If you have one, type in the 16 digit number, and then confirm it by typing it again. If you don't have one, you just close that step.

With or without a card, you can use the “Scan Barcode” and the camera on your smart phone to check the UPC of a food for WIC eligibility. There is also a “Yummy Recipes” function that can be accessed.

With a card, participants can use the “My Benefits” function to see their food benefit balance. For each food item with a balance, clicking the arrow will allow them to see WIC eligible brands of that food.

The app is safe to use as it only allows you to view information. It can't be used at the store to buy foods and it doesn't provide any personal or identifiable information.

## Participant Identification Number

- Set PIN on phone or on website
- Keep PIN confidential



Multiple staff reported that most participants in the pilot were familiar with the concept of debit cards and seem comfortable with the idea of setting a PIN and using the eWIC card. Of course, there will always be individuals who would like assistance with accessing the eWIC customer service phone line or website. Even when staff provide that assistance using a phone in the clinic, the participant always needs to set their own PIN to keep it confidential.

## Second cardholder

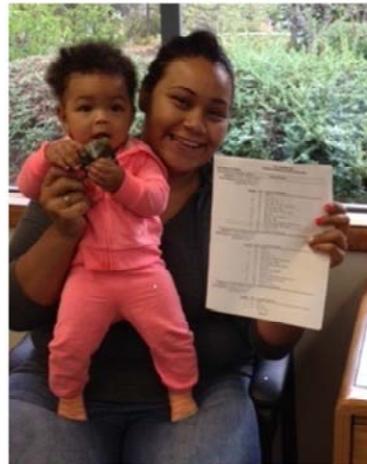
- 1/3 of all families will ask for a second cardholder



Another lesson learned is that one third of all families ask to have a second cardholder. Remind first cardholders to pick their second cardholders carefully as they will have access to all of the family's food benefits. The first cardholder will need to bring the second cardholder's information like birthdate and mailing address to the office in order to receive a card. Cards are not mailed so the second card will need to be picked up in person.

The first cardholder will be responsible for educating the second cardholder about everything from setting the PIN to shopping with the eWIC card. WIC staff will want to reinforce this training with the first cardholder, just as we do now with the first and second signers in our current system. In this picture, Linn staff share important shopper ed materials with a WIC participant.

## Practice makes perfect



So shopper education is a big deal! When it is done well, you end up with happy participants like the family pictured here who received the first card in Linn County on their first day of roll out. After training, consider finding time to role play with shopper education to hear how different staff explain the new shopping process using the new shopper ed materials. It gets easier with practice!

One note: remember there will be lots of repetition during roll out so staff will want to find ways of staying consistent over time.

Now back to Vernita for some other highlights...

## Proof of Identification

- eWIC card cannot be used as proof of ID
- Current WIC ID cards can still be used as proof of ID for WIC participants
- New WIC ID cards do not have signature lines and can only be used as proof of ID for participants



Thanks Cheryl! In addition to participant education, there have been other lessons learned. In the area of proof, it is important to remember that the eWIC card is not proof of identity. Current WIC ID cards can still be used. If an agency decides to offer new WIC ID cards, there are no signature lines so they will only be proof of ID for participants, not parents or guardians who are not on WIC.

## Clinic Operations

- No check out is required
- Many participants will still have vouchers when they first get eWIC
- Cards can be at each certifiers desk



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Other lessons learned were in the area of clinic operations. For example, there is no check out required with eWIC as there is no need to go to the front desk to pick up vouchers. No check out is great from a clinic flow perspective but certifiers will want to plan for a way to bring the interaction to conclusion at the end of the certification appointment since no stop at the front desk is required. Offering a summary statement is one option for providing this closure.

Many participants will have both paper vouchers for the current month and eWIC for the future months. It is helpful for staff to pause long enough to recognize which screens need to be accessed in order to process each action correctly, as the Benton staff is demonstrating in this picture.

The pilots determined that it is convenient to have cards at each certifier station rather than in one centralized location only. Since there are no benefits on the card, it is permissible to have the cards conveniently located for issuance. Even after cards are issued, there is no access to benefits without the pin.

## Odds and Ends

- Self paced lesson
- Assigning one year old benefits



And here are a couple of odds and ends that came up during pilot...

The pilots asked for a way to deliver and document shopper education when a returning participant misses their scheduled second nutrition education appointment but needs to be converted in order to receive benefits. A self paced lesson, “Shopping with eWIC”, has been developed to assist with this circumstance. It will be posted on the website along with other self paced lessons and can be used in situations when a self paced lesson would normally be used and conversion needs to be completed.

We all know that many families prefer to receive child benefits for their infant in the month that the infant turns one year old. We also know that child benefits cannot be issued to infants if any of their benefits for that month have been spent. In the voucher world this was clear cut: do not spend the infant’s vouchers. In the eWIC world, when the infant receives a fruit and veggie benefit, it is combined with other cash value benefits for the family. If any fruits or veggies are purchased, some of the benefit reduction will be assigned to the infant’s food package meaning that some of the infants benefits are spent. In that case, no change in category and food package will be available that month.

One work around is to consider not issuing the 12<sup>th</sup> month benefits for the infant if the family wants to switch food packages after infant’s birth date. Of course, the family can still choose not to shop for fruits or veggies with their

WIC benefits prior to the infant's birth date and that will allow a change in food package just as it currently does.

## In-person, hands on training

- Data system focus
- Regional
- 1 day (6 hours, 9 am to 4 pm)



So there is lots to learn about eWIC! Each agency will participate in 6 hours of regional face to face trainings that will help to put all the pieces together with special attention paid to TWIST functionality.

## “It will be easier than you think”

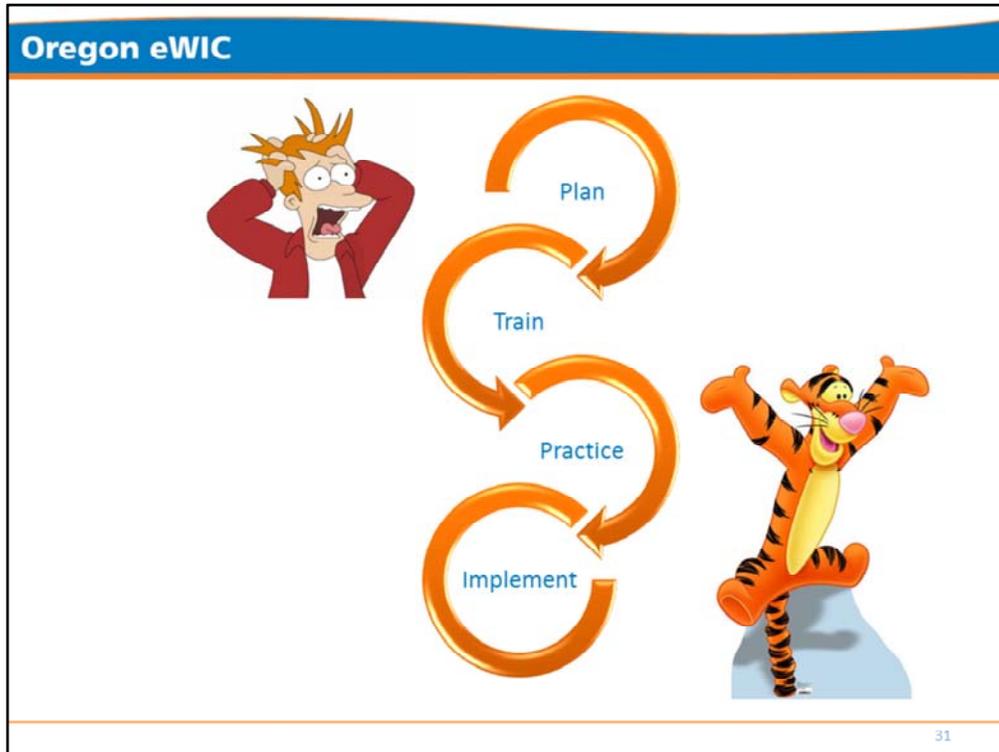
- Before eWIC training:
  - Watch shopper ed videos
  - Watch online vendor video
- After eWIC training:
  - Plan time to practice on practice on TWIST data base



When thinking through eWIC changes, it is possible that staff will be enthusiastic about eWIC but worried about all of the changes. The message we heard loud and clear from both pilot agencies is that “It’s easier than you think!”

To give staff a foundation in eWIC before coming to training, plan time for individuals or the group to watch the eWIC shopper ed videos and the vendor training video online. On a pilot survey, one staff member wrote that computer training was very valuable but that “ It would not have gone as well if we had not studied the policies and watched the videos.”

After training, schedule 1-2 hours of practice time in the TWIST practice data base for each staff member. This will help to solidify the processes that were covered in training and support a smooth transition during early roll out.



Once planning and training is completed, it really is a good time to practice. Of course, access to the practice data base will need to be available for practice to occur. The practice data base icon is on your Family Net log in page. If there are any issues with access, contact app support at the state office. After practice comes implementation and in three short months, your entire caseload will be converted to eWIC!

## Caseload

- Monthly No Benefits report
- Monthly No FIs reports
- Goal is to grow



And speaking of caseload, the current statewide goal is to grow participation in order to retain our funding from USDA. Even in the midst of eWIC roll out, we want to at least maintain caseload. This can happen with careful planning and monitoring. A new caseload report will be used to track participants without benefits called the “No Benefits report” This can be used in conjunction with the “No FIs report” during roll out as part of an active caseload management strategy.



- Plan for regular team check in
- Plan for a team celebration



With everything that is going on, taking good care of the super hero staff on every team is essential. Plan for daily team huddles to check in with each other during the first weeks of roll out. Plan for a team celebration on the first day of roll out like the Benton County staff pictured here or following the first week of roll out like the Linn County staff. Be sure to celebrate staff achievement of eWIC implementation!

## Time to plan...

- What still needs to be done to prepare for eWIC?
- What is the plan to make that happen?



So these are the eWIC lessons learned up to this date. Of course, there will be continual learning as we move forward with this process and state staff will keep everyone informed of new developments. Taking time to plan now, will assure successful implementation in the new year. Thank you for all that you are doing to make this change a reality!

## Questions

- We will pause to give you a minute to type in any questions you may have...



If you would like to submit a question regarding the information in this webinar, now is the time! We will pause for a moment to give you a chance to type in your question...

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## Resources

- [Recorded webinars](#)
- [Clinic eWIC Readiness Toolkit](#)
  - Task lists with time lines
  - Activities
- Available on the website



The screenshot shows the Oregon Health Department website. The main navigation bar includes 'Public Health' and a search bar. Below this, there are tabs for 'Topics A to Z', 'Data & Statistics', 'Forms & Publications', and 'News & Advisories'. The 'WIC' section is highlighted, and the 'For Oregon WIC Staff' page is displayed. This page features a 'Current topics' section with a link to the 'WIC calendar of events' and an 'eWIC' section with links to 'eWIC staff resources', 'eWIC rollout timeline', 'eWIC webinars, #1 - #5', 'eWIC webinars, #6 - #10', and the 'Oregon clinic eWIC readiness toolkit'.

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Additional eWIC information is available on the Oregon WIC website. A “Shopping with eWIC” page is devoted to shopper ed information while the eWIC section for Oregon WIC staff has materials for staff to reference when completing their eWIC planning process. And as always, App Support is available if needed. If something unusual happens with food packages or TWIST functionality, give them the details and they will be happy to provide assistance.

## Resources

- If you have additional questions please contact your state nutrition consultant, Cheryl Alto at [cheryl.l.alto@state.or.us](mailto:cheryl.l.alto@state.or.us) or Vernita Reyna at [vernita.d.reyna@state.or.us](mailto:vernita.d.reyna@state.or.us)
- Recorded webinars and eWIC materials can be accessed on the Oregon WIC website:  
<http://public.health.oregon.gov/HealthyPeople/eFamilies/wic/Pages/ewic-webinars.aspx>

Thank you for viewing this webinar! Please contact your state nutrition consultant, myself or Cheryl if you have additional questions. It has been a privilege to be a part of this eWIC journey with you!