

Oregon eWIC



Appointment Scheduling & Caseload Management

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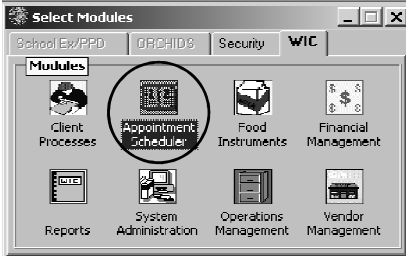
During this webinar we will...

- Identify modifications to your appointment schedule needed for eWIC planning and preparation before conversion
- Review the coordination of family appointments and voucher issuance for conversion
- Describe appointment schedule options during conversion for new and existing participants

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Appointment Scheduler




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Appointment Schedule

Adjustments Before Conversion

- View the Webinars
- 4 Required for All Staff:
 - eWIC Basics
 - eWIC in TWIST
 - Conversion Plan and Participant Notification
 - Vendor Perspective and Shopper Education




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Appointment Schedule

Adjustments Before Conversion

- Clinic Readiness Discussions
- eWIC Policy Changes
- Clinic Flow Decisions



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Appointment Schedule

Adjustments Before Conversion

- Face-to-Face Training
- Practice TWIST and adjust plans as needed



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Caseload Considerations before Conversion

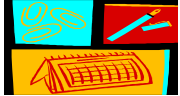


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Caseload Considerations during Conversion

- Coordinating Family Appointments and Voucher Issuance to minimize impact on caseload and clinic operations



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Family Appointment Coordination



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Family Appointment Coordination

Client Processor - [CP4209 - Family Summary Screen]

Family Information

ID	Name	DOB	Client	Client Status	Start Date	End Date	High Mark	Print	Month	Reason	Script
01	Lemonda R Lewis	12/01/1960	01	W	07/03/2012	03/20/2014	11	N	09/01/2013		
02	Paula A Sussler	02/01/1966	01	W	07/03/2012	03/20/2014	11	N	09/01/2013		

Appointment/PI Schedule

ID	Name	Appr	Pl	Plg	Pl	Appr	Pl	Plg	Pl	Appr	Pl	Plg	Pl
01	Penelope												
02	Sophie												

Print Selected PI | Place on Print Queue | Default Printer: None Selected

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Family Appointment Coordination

Family Information

ID	Name	DOB	Client	Client Status	Start Date	End Date	High Mark	Print	Month	Reason	Script
01	Sophie G Damer	02/07/1901	01	W	07/03/2012	03/20/2014	11	N	09/01/2013		
02	Brinkley G Bates	04/07/2012	01	CI	07/03/2012	12/31/2013	11	N	09/01/2013		

Appointment/PI Schedule

ID	Name	Appr	Pl	Plg	Pl	Appr	Pl	Plg	Pl	Appr	Pl	Plg	Pl
01	Sophie												
02	Brinkley												

Print Selected PI | Place on Print Queue | Default Printer: None Selected

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Family Appointment Coordination

Client Processor - [CP1205 - Family Summary Screen]

Family Information

ID	Name	DOB	Client	Client Status	Start Date	End Date	High Mark	Print	Month	Reason	Script
01	Amy A Ashland	12/03/1962	01	W	07/03/2012	03/20/2014	11	N	09/01/2013		
02	Andrew A Ashland	01/01/2012	01	CI	07/03/2012	01/01/2014	11	N	09/01/2013		
03	Robby Ashland	01/02/2013	01	CI	07/12/2012	01/01/2014	11	N	09/01/2013		

Appointment/PI Schedule

ID	Name	Appr	Pl	Plg	Pl	Appr	Pl	Plg	Pl	Appr	Pl	Plg	Pl
01	Penr												
02	Andrew												
03	Robby												

Print Selected PI | Place on Print Queue | Default Printer: None Selected


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Appointment Schedule

Adjustments During Conversion

- Existing Participants
 - Recertification
 - Individual Second NE
 - Group Second NE



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Appointment Schedule

Adjustments During Conversion

- Existing Participants
 - Recertification
 - Individual 2nd NE




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Appointment Schedule

Adjustments During Conversion

- Existing Participants
 - Group 2nd NE
 - Or
 - Individual NE

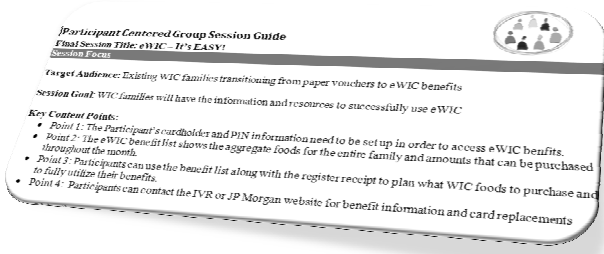


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eWIC Group Session Guide

- “eWIC – It’s EASY”



Participant Centered Group Session Guide
Final Session Title: eWIC – It’s EASY!
 Session Goal: WIC families will have the information and resources to successfully use eWIC.

Target Audience: Existing WIC families transitioning from paper vouchers to eWIC benefits

Key Content Points:


- Point 1: The Participant’s cardholder and PIN information need to be set up in order to access eWIC benefits.
- Point 2: The eWIC benefit list shows the aggregate foods for the entire family and amounts that can be purchased throughout the month.
- Point 3: Participants can use the benefit list along with the register receipt to plan what WIC foods to purchase and to fully utilize their benefits.
- Point 4: Participants can contact the IVR or JP Morgan website for benefit information and card replacements

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Group Session Considerations during eWIC conversion


- Verifying the Food Package
- Reviewing the Food Benefits List
- Adding a second cardholder



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Group Session - Example One




- Before the group begins - Certifier verifies food package for each family member and prints benefit list
- At group check-in - Clerical staff enters family cardholder information and issues eWIC card
- During group – participant has their own card and benefit list to review
- After group – set PIN, add second cardholder

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Group Session - Example Two



- At check-in – Certifier verifies food package for each family member while clerical staff enters cardholder information, issues card and prints benefit list
- During group - participant has their own card and benefit list to review
- After group – set PIN, add second cardholder


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Appointment Schedule

Adjustments During Conversion

- New Participants
 - Certification



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Appointment Schedule

Adjustments During Conversion

- Template Modification

Start Time	End Time	Priority	Appointment Type	Method	Schedule Only	Non Client Activity
08:00 AM	08:30 AM	ANY	ANY APPOINTMENT	20	NO	
08:30 AM	09:00 AM	ANY	ANY APPOINTMENT	20	NO	
09:00 AM	09:30 AM	ANY	ANY APPOINTMENT	20	NO	
09:30 AM	10:00 AM	ANY	ANY APPOINTMENT	20	NO	XEROGRAPHY
10:00 AM	10:30 AM	ANY	ANY APPOINTMENT	20	NO	
10:30 AM	11:00 AM	ANY	ANY APPOINTMENT	20	NO	BREAK
11:00 AM	11:30 AM	ANY	ANY APPOINTMENT	20	NO	
11:30 AM	12:00 PM	ANY	ANY APPOINTMENT	20	NO	
12:00 PM	12:30 PM	ANY	ANY APPOINTMENT	20	NO	LAUNCH
12:30 PM	01:00 PM	ANY	ANY APPOINTMENT	20	NO	
01:00 PM	01:30 PM	ANY	ANY APPOINTMENT	20	NO	
01:30 PM	02:00 PM	ANY	ANY APPOINTMENT	20	NO	

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Appointment Schedule

Adjustments During Conversion

- Copy Template Modification

Start Time	End Time	Priority	Appointment Type	Method	Schedule Only	Non Client Activity
08:00 AM	08:30 AM	ANY	ANY APPOINTMENT	20	NO	
08:30 AM	09:00 AM	ANY	ANY APPOINTMENT	20	NO	
09:00 AM	09:30 AM	ANY	ANY APPOINTMENT	20	NO	
09:30 AM	10:00 AM	ANY	ANY APPOINTMENT	20	NO	
10:00 AM	10:30 AM	ANY	ANY APPOINTMENT	20	NO	
10:30 AM	11:00 AM	ANY	ANY APPOINTMENT	20	NO	
11:00 AM	11:30 AM	ANY	ANY APPOINTMENT	20	NO	
11:30 AM	12:00 PM	ANY	ANY APPOINTMENT	20	NO	
12:00 PM	12:30 PM	ANY	ANY APPOINTMENT	20	NO	
12:30 PM	01:00 PM	ANY	ANY APPOINTMENT	20	NO	
01:00 PM	01:30 PM	ANY	ANY APPOINTMENT	20	NO	
01:30 PM	02:00 PM	ANY	ANY APPOINTMENT	20	NO	

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Issuing food benefits to participants who missed 2nd NE during conversion

- Planning for missed Nutrition Education

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Caseload Management Reports

- Parallel Reports during conversion for dual systems
- Example:
 - No FI's
 - No Issuance

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Staff check in during conversion



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Staff celebration during or after conversion



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Time to think

- Take a minute to think about what you have heard during this webinar – how does it impact your clinic?
- We will pause to give you a minute to type in any questions you may have.



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Questions and Answers

- If you have additional questions please contact your agency's state nutrition consultant or Sara Sloan at sara.e.sloan@state.or.us
- Recorded webinars and FAQ's can be accessed on the WIC website here: <http://public.health.oregon.gov/HealthyPeople/Families/wic/Pages/ewic-webinars.aspx>

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