



# Planning and Implementation Primer Session

Mary Blocksidge

Jane Dvorak

Massachusetts WIC Program

July 20, 2016

# Massachusetts WIC Program

- Current caseload 120,730
- 959 Retailers
  - 332 Small Independent stores
  - 417 Chains
  - 210 Pharmacies
- Rolling benefit cycle



# The WIC Card

- Selected FIS/CDP as the development and implementation contractor in July 2013
  - Project Kickoff Meeting October 2013
    - Team concept with one goal
    - Schedule milestones
    - Open Communication
    - Accountability



# Communication to Participants

- Developed a tear off announcing “shopping gets a little easier”
- Given to participants and circulated in the community for 3 months prior to Rollout.



# Education for Participants - Video

- Video – showed video at the last pick up, prior to issuing the card. Most programs continued to play the video through the first 3 months of rollout.
- All programs received English and Spanish versions and a portable DVR player, if needed.
- Also posted to the DPH website
- Can be viewed on YouTube:

<https://www.youtube.com/watch?v=K0AG8tbqzUI>



# Education for Participants – Brochure

- Printed and drop-shipped to each local program prior to “go live”
- Given to participants when the WIC Card was issued
- Explained how to use the card and contained FAQ’s
- Translated into several languages
- Posted to the DPH website
- <http://www.mass.gov/eohhs/docs/dph/wic/the-wic-card-brochure.pdf>



# Education for Staff

- All local agency required to attend training, regardless of position
- Half-day training for staff who didn't typically issue benefits; i.e. nutritionists
- Full-day training for program assistants
  - Trained on the “happy path”
  - Trained on more complicated situations – adding new member to a household, food package changes, reissuing E-benefits to a family with existing checks, food package change for a household with E-benefits who transfers to a non-E program
  - Training materials contained one page flow sheets for the common and complex scenarios



# Communication with Local Program Staff

- Monthly calls became bi-weekly calls, became weekly calls.
- Began with pilot programs only. Eventually included all sites.
- Readiness checklist given to pilot programs and eventually all local programs
- Reviewed on every call.

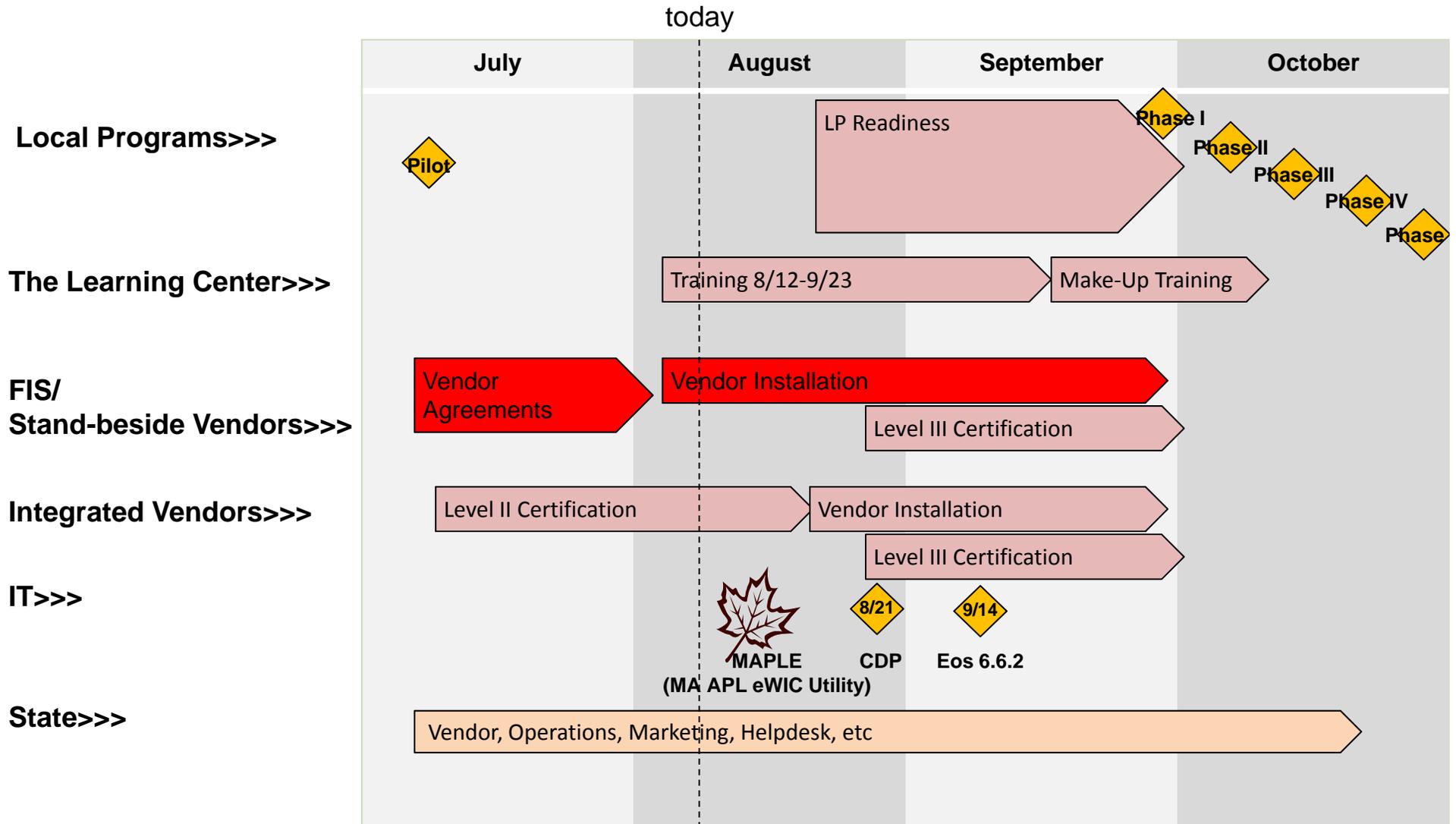


# Communication with State Agency

- Weekly meetings
  - Contractor/Developers
  - Individual meetings with key units at the State office - Operations, Vendor, Helpdesk
  - Weekly All Hands on Deck Meeting - reviewed progress made over the past week with each unit and expectations for the upcoming week
  - No surprises! Staff encouraged to bring issues forward as soon as they become known, not to wait for the weekly meeting.



# Timeline



## Updates

## Next Steps

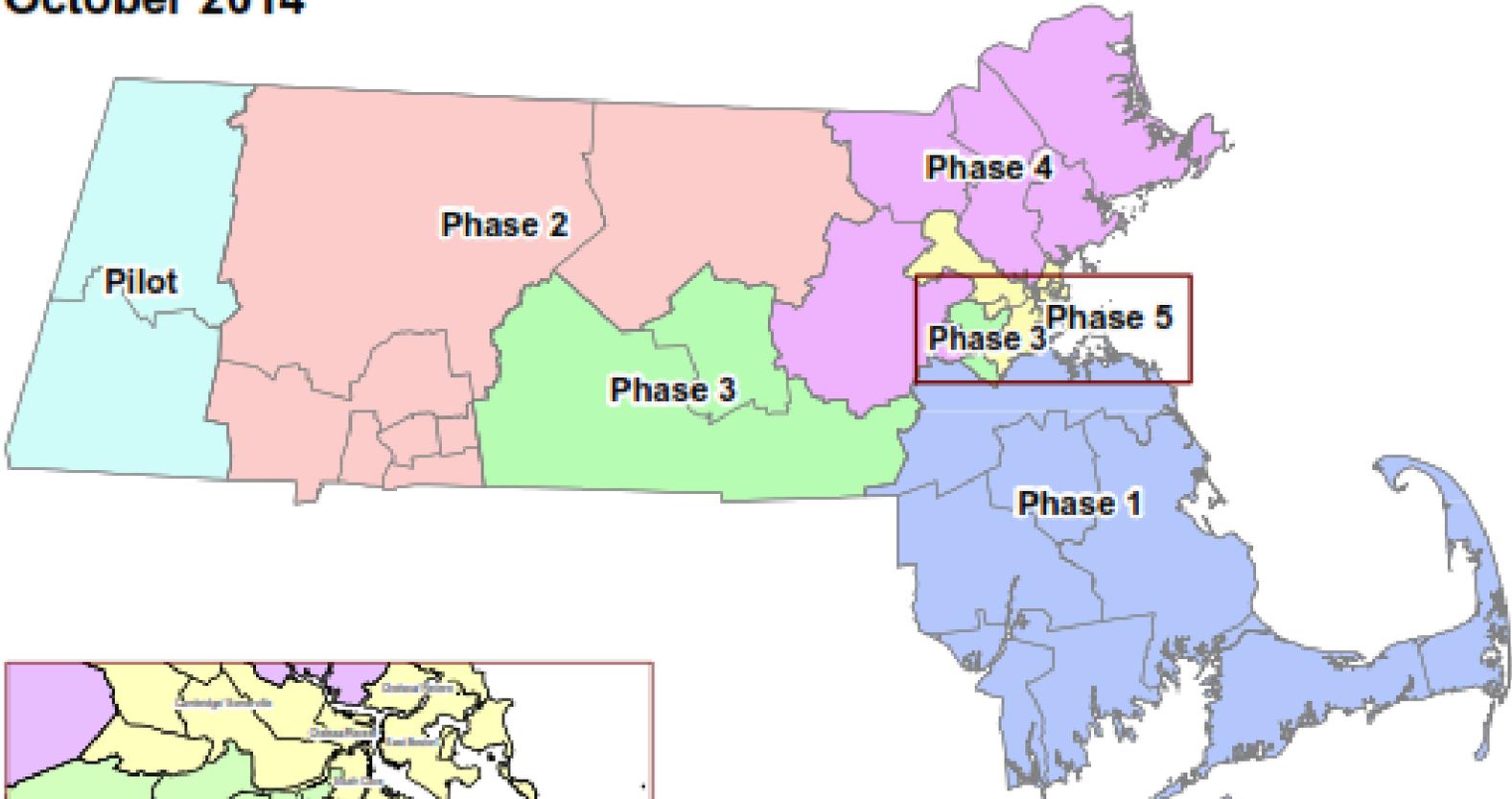
	Updates	Next Steps
<b>Training</b>	<ul style="list-style-type: none"><li>• Whole lotta trainin'</li></ul>	<ul style="list-style-type: none"><li>• Schedule rollout visits</li></ul>
<b>Helpdesk</b>	<ul style="list-style-type: none"><li>• Continue to log calls and refine responses</li></ul>	<ul style="list-style-type: none"><li>• Communication plan</li></ul>
<b>Operations</b>	<ul style="list-style-type: none"><li>• Schedule material delivery for statewide</li><li>• LP readiness</li></ul>	<ul style="list-style-type: none"><li>• Develop communication plan to LPs and participants</li><li>• Determine rollout assignments</li></ul>
<b>IT</b>	<ul style="list-style-type: none"><li>• 6.6.2 is on schedule for Sept 14 release</li><li>• CDP is working on the next release 8/21</li><li>• MAPLE development is in-progress</li><li>• Image, PIN pad, and wedge installations are on-going</li></ul>	<ul style="list-style-type: none"><li>• Develop reporting</li></ul>

# Pilot/Rollout

- Pilot – Western Massachusetts, July 2014
  - 2 local programs, 3 sites, 20 vendors, 2,600 participants
- Statewide Rollout in 5 phases during the month of October 2014
  - 33 local program, 117 sites, 970 vendors, 122,500 participants



# Phases of Massachusetts WIC Card Roll Out October 2014



**Legend**

Light Blue	Pilot	July 9th
Blue	Phase 1	October 1st
Pink	Phase 2	October 8th
Green	Phase 3	October 15th
Purple	Phase 4	October 22nd
Yellow	Phase 5	October 29th

# Vendor Communications

- Vendor Advisory Project Kick-Off meeting.
- Monthly Vendor Advisory Council meetings.
- Integration meeting for Corporate IT staff, Contractor and State staff.
- Statewide Vendor Informational sessions.
- Regular communications with CDP and stores implementing integrated systems.
- Regular project updates **via email to all retailers.** Project updates were weekly during the statewide rollout.
- Approximately 60% of stores were visited prior to rollout to determine store readiness.

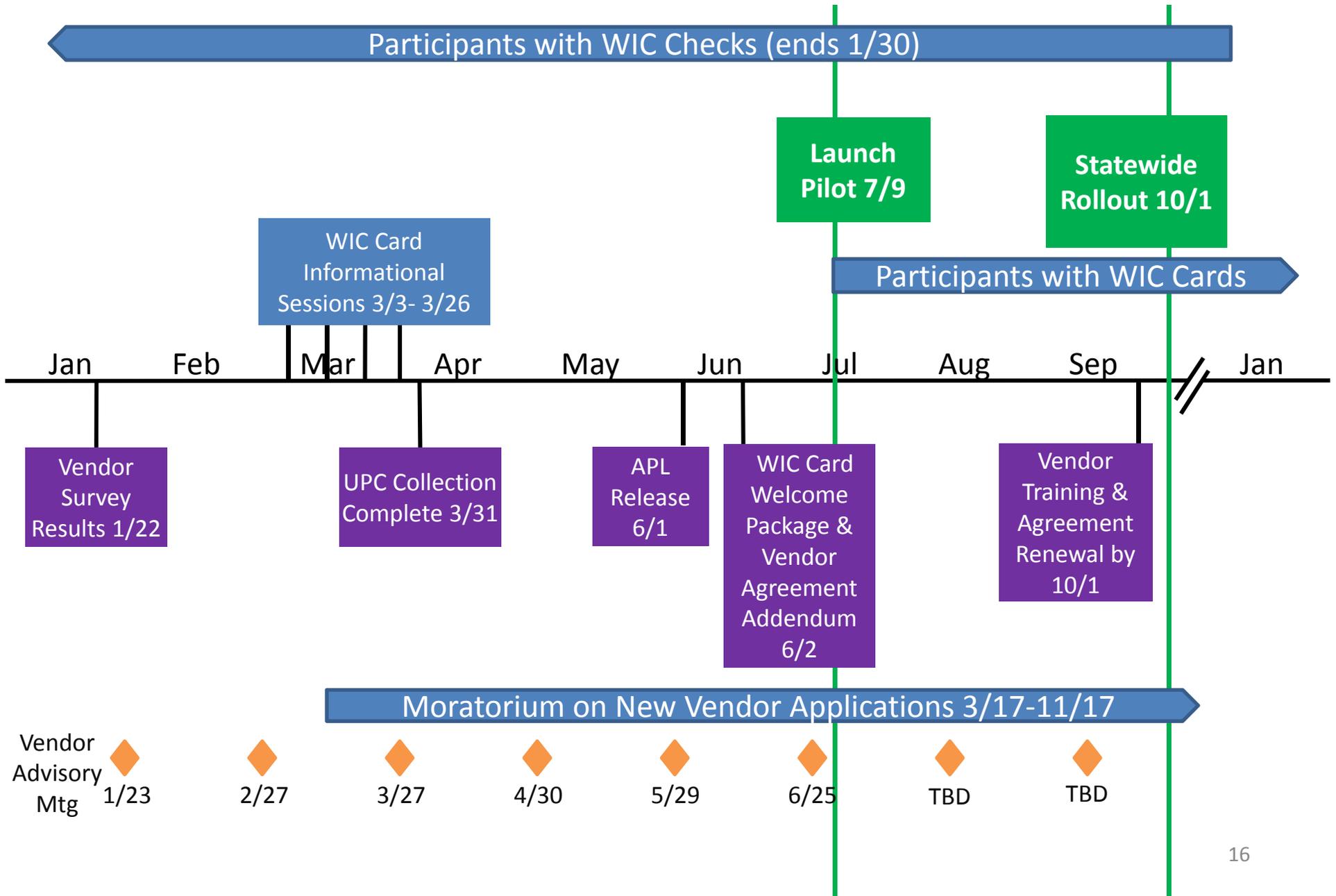


# Vendor Advisory Council

- Monthly meetings - members could attend in person or via “Go to Meeting”.
- Membership was expanded to IT staff.
- Standard agenda items were reviewed at each meeting.



# WIC Card Timeline



# Integrated vs. Stand Beside Systems

- Stand-beside POS

(Point of Sale)

- Stores with 1-2 registers



- Integrated ECR

(Electronic Cash Register)

- Stores with multi-lanes



# Approved Product List (APL)

- Electronic file containing all UPC and PLU codes approved by MA WIC.
- Identifies scanned items as WIC approved
- Stores will not have an override feature when an item is missing from the APL.
- File exchanged with vendors nightly and stored in the electronic cash register or stand-beside terminal.
- Test APL was released to vendors on June 1



# Keys to a Successful Rollout

- Teams of state staff visited most rollout area retailers and WIC programs the day prior to rollout to answer questions, check equipment and assess readiness
- Local programs were sent a list of stores in their service area that were not ready so that participants could be informed
- State staff (including IT), and CDP staff were on site at each local program on “go live” day to assist in benefit issuance, answer questions, listen for issues that could be shared.
- Daily touch point meeting around mid-day of each “go live” day to report progress, relay issues or concei



# Lessons Learned

## Balance Inquiries

### **WIC customers can determine their account balance by:**

- Checking their last store receipt from a WIC purchase.
- Requesting a balance inquiry at the customer service desk or any cash register.
- Utilizing the WIC Shopper App (balance is provided in real time).
- IVR is also helpful (not currently using in MA).



# Lessons Learned

## Insufficient Funds

This message will occur at the cash register when the WIC customer is using their card before their benefits are valid, or there are no benefits available in the account.

WIC local agency staff has implemented procedures to help with this issue:

- Benefit periods are highlighted on the Shopping List.
- Participants are instructed they need to attend their WIC appointment to continue to receive benefits. **New** WIC benefits do not automatically reload.
- WIC staff are using stickers and recommending participants put a reminder in their phone for their next appointment.



# Lessons Learned

## Invalid PIN

- The WIC customer's PIN will lock if the correct PIN is not entered on the ninth try.
- The participant can call their local WIC program or the 800 number on the back of their card to get their account unlocked.
- If the WIC customer forgets their PIN they must visit their local WIC Program to change it.
- Local programs have "Post it Notes" available for participants to write down their PIN number.



# Lessons Learned

## WIC Approved Foods Issues

### Most common reasons:

- The food item being purchased is not a WIC authorized food item.
- The food item is a WIC approved food that is available as part of the WIC customer's benefits, however; the UPC code is not in the Massachusetts WIC Approved Product List (APL) file.
- The WIC customer does not have enough benefits in their balance to purchase the WIC food item, or the specific item is not available in their benefit balance.

### Examples:

- Cereal cannot be purchased if the benefit balance is less than 12 oz.
- Whole milk instead of 1%/Fat Free milk.
- Incorrect formula purchases (i.e. Enfamil Newborn formula instead of Enfamil Infant formula).



# Lessons Learned

## Approved Products Listing

- Use the National Cat/Subcat structure
- Utilize files from chain stores and manufacturer's.
- Specify file formats when requesting files (i.e. UPC must contain the check digit).
- UPC's from small or medium stores were collected manually.
- Make the test APL available as early as possible before the pilot.
- Post the APL to your website if possible.



# Keys to a Successful Project

## Cashier Training/Readiness

### **Don't assume cashiers are trained!**

- MA WIC Help Desk initially received many calls from WIC customers who were turned away as the cashier did not know how to conduct a WIC Card transaction.

### **Keep in mind, cashier training is now at the store level.**

- Integrated stores: cashiers were trained according to the in-store training procedures.
- Stand Beside stores: were trained by the Contractor (FIS) and received training via telephone upon installation of the terminal and were sent a training manual and quick reference sheet.
- Approximately 60% of stores were visited by state staff prior to rollout to determine retailer readiness.

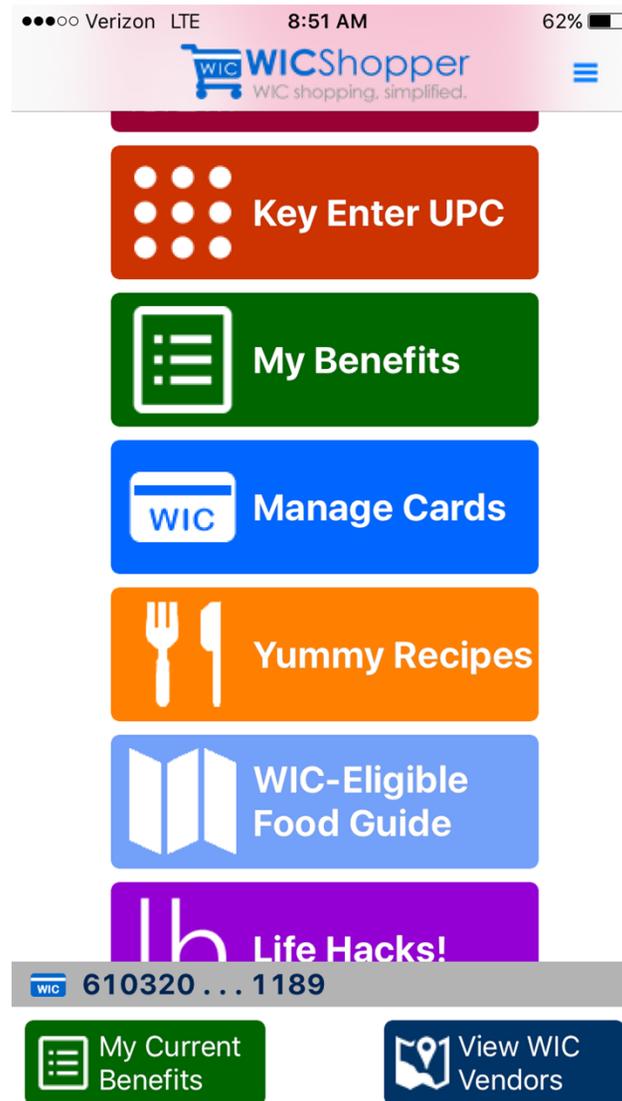


# Lessons Learned

- Start communicating as soon as possible to chain stores that do not currently have an integrated eWIC system.
- Develop policies for benefit issuance for situations when the participant is not present.
- The statewide rollout period should be as fast as possible to minimize the time period 2 systems are operating.
- Determine who will be responsible for retailer Level III Certifications (i.e. state or Contractor).
- Collect vendor and participant emails.



# Mobile App-WIC Shopper



# Mobile App-WIC Shopper

The app has many features and allows WIC customers to:

- View their current WIC benefit balance on their smartphone, allowing them to know with certainty what they can purchase.
- Scan product UPC codes while they shop to check if the item is WIC approved (i.e. on the Approved Products Listing) **and** if it is available within their own benefits.
- Locate WIC approved retailers in MA.



## Mobile App-WIC Shopper

- The number of WIC participants using the WICShopper App continues to grow! During the month of May 2016, Massachusetts had 73,711 registered families and 201,031 shopping trips.
- The 201,031 shopping trips involved 48,940 different WIC families. That means, 66.4% of all shoppers that have registered with WICShopper actually shopped with the app during this month.

Help desk calls have decreased significantly and participant feedback has been positive!



# Keys to a Successful Project

- Team concept with one goal
- Everyone was responsible for their piece
- Open and frequent communication
- Hire a project manager
  - Project managers organized all meetings – stakeholders, vendors, individual units, entire team
  - Took notes, reminded us of deadlines