August 8, 2017

ADDENDUM #2

RFP # 7553518

Title: RI WIC Management Information System (MIS) Quality Assurance Project

Bid Closing Date & Time: September 7, 2017 at 10:00 AM ET

_____

Notice to Vendors

> **ATTACHED ARE VENDOR QUESTIONS WITH STATE RESPONSES. NO FURTHER QUESTIONS WILL BE ANSWERED.**

_____

David J. Francis
Interdepartmental Project Manager

Interested parties should monitor this website, on a regular basis, for any additional information that may be posted.

Vendor Questions for RFP #7553518 RI WIC Management Information System (MIS) Quality Assurance Project

Question 1:   Whether companies from Outside USA can apply for this?
      (like,from India or Canada)

> Answer to question 1: **Because this project involves protected health information (PHI), we are not able to ensure that companies outside of the USA would be able to meet federal requirements and ensure privacy and security under US law.**

Question 2:   Whether we need to come over there for meetings?

> Answer to question 2: **While some meetings may be attended remotely, there will be some meetings in which the vendor must attend in person.**

Question 3:   Can we perform the tasks (related to RFP) outside USA? (like, from India or Canada)

> Answer to question 3: **Any tasks dealing with protected health information (PHI) cannot be performed outside if the USA. See Question 1.**

Question 4:   Can we submit the proposals via email?

> Answer to question 4: **No, proposals must be submitted as outlined in the instructions.**

Question 5:   Has a funding source for this project been secured? If so, through which source (budget, grants, etc.)?

> Answer to question 5: **Funding has been secured through USDA grants, which have already been approved**.

Question 6:   eWIC EBT Service Provider- Has Rhode Island and Conduent executed an agreement or purchase order yet? If so, about when and how much was it finalized?

> Answer to question 6: **Rhode Island has a contract with Conduent under the Northeast Coalition of States agreement**.

Question 7:   eWIC EBT Software – Which vendor is providing the software?

> Answer to question 7: **Crossroads is our selected MIS, Conduent is our eWIC processor.**

Question 8:   At this time we are wondering if you have a functional diagram of your systems architecture for review. This will enable us to gear our response toward your technical environment.

>Answer to question 8: **Please see attached document RIWEBS TABLES LIST.PDF**

Question 9:   Are subcontractors on previous planning studies eligible to bid? Page 7 Contractors with internal knowledge of the project through participation in the planning process, such as Planning Contractors, are not eligible to be awarded this contract.

>Answer to question 9: **Contractors not involved in the planning for the current iteration of the RI EBT/MIS project are eligible to be awarded this contract.**

Question 10:   If we were to be the successful bidder, how does one go about procuring a Certificate of Authority from the Rhode Island Secretary of State? Page 6 In accordance with Title 7, Chapter 1.2 of the General Laws of Rhode Island, no foreign corporation, a corporation without a Rhode Island business address, shall have the right to transact business in the State until it shall have procured a Certificate of Authority to do so from the Rhode Island Secretary of State (401-222-3040).

>Answer to question 10: **The form and instructions can be found at http://sos.ri.gov/assets/downloads/documents/150-certificate-of-authority.pdf**

Question 11:   Please confirm whether or not the QA contractor is responsible for the meeting summaries for both the periodic status meetings, as well as, the quarterly status meetings? Page 15 Project Status Reporting

>Answer to question 11: **QA is responsible for periodic and quarterly status meeting summaries.**

Question 12:   Shall the QA contractor assume that the UAT will run for a period of 8-10 weeks and should propose a schedule that fits within this time period? Pages 21-2 Evaluate UAT Script/Support UAT: QA contractor shall propose a schedule for UAT." But then on page 22. Section 5.7 Support UAT it notes that "the period of UAT will be either to ten weeks in duration.

>Answer to question 12: **Confirmed. UAT will be expected to run for up to 8-10 weeks, and the QA contractor will propose a schedule of testing that fits within that time frame. "Either" was an error which should read "Eight".**

Question 13:   Where will this pre-test occur? How does this pre-test relate to retailers? Page 22Attend and Evaluate System Pre-Test: This task is unclear. The narrative notes that a pre-test of the eWIC system will be conducted and the QA contractor must attend and provide a written report noting any deficiencies. This task is included as a sub section to retailer certification for eWIC.

Answer to question 13: **The pre-testing will occur at a local retailer prior to the vendor rollout (which will occur prior to Pilot). QA is expected to attend the first system pre-test on site, so that testing methods can be evaluated and adjusted as necessary.**

Question 14:   Is it the state's intention to have 5 weeks of staff training during the pilot period and 3 weeks of staff training during the rollout period for a total of 8 weeks of trainings? How many staff will be trained during the Pilot period?
How many staff will be trained during the rollout period? Page 25 Notes that the contractor "must provide one staff member for on-site support for these trainings throughout the five week process". An additional e weeks of support in end user training is requested in 8.3 Assist in End User Training During Rollout.

Answer to question 14: **The state intends to have 5 weeklong trainings during the Pilot period, this will be the primary training the non-pilot agencies will receive. This 5-week training period is expected to have approximately 20 local agency staff per session. Each of the three rollouts will include a three-day refresher training during system transfer.**

Question 15:   Is the QA contractor required to have these things in place including an education, training and staff development plan and a comprehensive cultural competency plan? Page 27 Cultural and Linguistically Appropriate Services in Health Care

Answer to question 15: **CLAS standards are required for all contracts funded by federal funds and the contractor should have these items in place within their organization.**

Question 16:   Does the State intend that the 6 page technical proposal include a response to the required tasks and all applicable samples of work? Or can the samples of work be included as appendices? Page31-2 A separate Technical Proposal describing the qualifications and background of the applicant and experience with and for similar projects, and all information described earlier in this solicitation. The Technical Proposal is limited to six (6) pages (this excludes any appendices). As appropriate, include resumes of key staff that will provide services covered by this request.

Answer to question 16: **Samples, resumes, and other relevant materials may be included as appendices.**

Question 17:   Please clarify the manner in which a vendor will be selected. Page 32 Concluding Statements: "…the State reserves the right not to award this contract or to award on the basis of cost alone, to accept or reject any or all proposals, and to award in its best interest". However in section 6: Evaluation and Selection, the narrative notes that a proposal must obtain 60 technical points or higher to be evaluated for cost.

Answer to question 17: **The vendor will be selected based on the criteria in the evaluation and selection, section 6 of the RFP. The 60 technical points**

minimum indicates that if a vendor scores less than 60 points in technical categories specified, their cost component will not be opened and evaluated and the proposal will not be dropped from further consideration.

Question 18:   Please confirm that this project is considered a 'procurement' project under Rhode Island General Law 37-14.1, and therefore subject to participation goals for MBEs. Instructions and Notification to Offerors, Item 14, page 6

> Answer to question 18: **Yes, this is a procurement, and yes, it is subject to RIGL 37-14.1. Pursuant to RIGL 37-14.1-2, there is a minimum 10% MBE participation requirement for all solicitations, projects and contracts funded in whole or in part with state funds or federal funds that the state administers. Vendors are required to make a good faith effort to fulfill this participation requirement. The pertinent regulations regarding good faith are posted on the Office of Diversity, Equity & Opportunity website (http://odeo.ri.gov/).**

Question 19:   The RFP states "*There will be checkpoints established in the project timeline that represent deliverable due dates, and the QA Contractor will be responsible for meeting these timelines.*" We are seeking clarification on the "checkpoints". Do the checkpoints correspond with the scope of this QA RFP or is there a dependency on T&I vendor deliverables/milestones as outlined in the timeline in the T&I RFP? If not one of these, what do these checkpoints represent and where can we find more information about them? Section 3: Project Management, paragraph 2, page 11

> Answer to question 19: **The checkpoints match the scope of the QA RFP, but will be reliant on a schedule developed by the TIC (T&I), eWIC, QA and the state agency in cooperation. These checkpoints will not add tasks beyond those specified in the QA RFP, but will indicate when these tasks should be due.**

Question 20:   The page limit of six (6) pages for the Technical Proposal seems insufficient to adequately describe the content requested in Section 3 (Scope of Work) and Section 8 (Response Contents) of the RFP. These items include the offeror's understanding of the work and the overall strategy to reach and maintain the requirements of the contract; detailed descriptions of all planned activities; a project work plan; and detailed explanations of how we will accomplish the tasks. We respectfully request that the State increase the page limit to allow offerors to include all the information requested in the RFP.

Section 3: Scope of Work, Item 1, paragraphs 2 and 3, Page 12

Section 3: Scope of Work, Item 3, paragraph 1, page 14

Section 8: Response Contents, Item 3, pages 31 and 32

Answer to question 20:   **The page limit will not be extended, but bidders may include as many appendices as necessary, with the Technical Proposal section entailing an overview with references to the appendices as needed.**

Question 21:   Will the State provide work space for QA contractor staff? Or should we presume that access to facilities is limited only to those times when we meet with staff or must review hardcopy artifacts? Section 3: Access to Facilities, page 12

Answer to question 21: **The State Agency will provide workspace as needed.**

Question 22:   Will the State provide access to necessary systems and tools (e.g., project repository, EDMS, requirements and testing tools, project management tools, etc.); including remote access (such as VPN or SSL) to QA contractor staff?   General

Section 3: Access to Facilities, page 12

Answer to question 22: **No, any needed tools must be provided by the contractor.**

Question 23:   Is there an amount (budget amount, not to exceed amount) within which offerors should cap their pricing proposals?

Answer to question 23: **No, there is no budget cap.**

Question 24:   Please clarify the type of pricing to be submitted. Instructions and Notification to Offerors, Item 5, page 5 indicates 'firm and fixed' price, however, Section 5: Cost Proposal, paragraph 2, page 29 refers to cost estimates, and Section 8: Response Contents, Item 4, page 32 indicates hourly rate.
Does the State want a fixed price per deliverable? Or does the State want to be invoiced based on time (hourly rate(s)) and expenses (travel)? Instructions and Notification to Offerors, Item 5, page 5

Section 5: Cost Proposal, paragraph 2, page 29

Section 8: Response Contents, Item 4, page 32

Answer to question 24: **The application can be based on a fixed price per deliverable, but the documentation of how that price was determined needs to be included and will include hourly rates and number of hours by staff person. Travel will be a separate line item that will not be included in the price per deliverable.**

Question 25:   How does the State desire to be invoiced for deliverable tasks, for example, are all items under a Phase to be invoiced together, or individually?   Appendices A and B

>Answer to question 25: **Per approved deliverable, but can be invoiced together in itemized batches. Each deliverable needs to be approved by the State Agency before invoicing.**

Question 26:   How shall deliverable tasks that continue throughout the Project, such as Total Project Status Reports and Meeting Summaries, be invoiced? Should these be invoiced on a monthly basis, that is, the total cost of the task divided by the 22 months in the project to arrive at a monthly rate? Appendices A and B

>Answer to question 26: **Status Reports and Meeting Summary billing should be itemized and tied into the billing of whatever deliverables are in development/completed during that time period.**

Question 27:   Appendix A indicates that "All costs are to be per Basic Cost transaction". What is meant by "Basic Cost transaction"? Appendix A

>Answer to question 27: **Costs should not incorporate travel expenses, which should be only included at the bottom of the sheet.**

Question 28:   Appendix B asks for staffing and travel costs per deliverable/task. Assuming the pricing to be submitted is fixed price per deliverable/task, what is the purpose of Appendix B? For example, does Rhode Island intend to reduce the cost of a deliverable if the hours to produce the deliverable are less than estimated? Will Rhode Island pay more for the deliverable if hours to produce the deliverable exceed the estimate? Appendix B

>Answer to question 28: **Appendix B serves as the backup worksheet in how deliverable costs were determined.**

Question 29:   Does Rhode Island intend to reimburse travel costs? If so, what travel guidelines must be followed? Appendix B

>Answer to question 29: **Yes, actual travel costs will be reimbursed. The mileage rate to be reimbursed is the IRS mileage rate, which is currently $0.535/mile. Out of state travel reimbursements will consist of airfare, transportation, hotel, parking, and incidentals/per diem. Please include all travel costs in the budget worksheet.**

Question 30:   We have negotiated alternate terms with the state that the State has accepted in the past on other contracts. Can the state be willing to consider using those rather than the standard in the RFP, or allow alternate language in the proposal?

Answer to question 30: **No, not with the boilerplate language.**

Question 31:   Did the State receive assistance from an external vendor with the RFP? If so, who and are they eligible to bid on this RFP?

Answer to question 31: **No external vendors assisted with the QA RFP.**

Question 32:   RI EBT Planning vendors. Who provided this service? Can the State re-confirm that they are precluded from participating in a bid on this QA RFP, in accordance with Clause #17?

Answer to question 32: **Vendors involved in the planning process for the current iteration of this project are precluded from being awarded this contract.**

Question 33:   Please clarify the use of the word "Audit"? It is normal to verify that all documentation has been updated and provided to the state, prior to completion of the project. Would validation that all materials have been updated by the vendors and verification of this, meet this deliverable.

Answer to question 33: **A final, documented validation that all documentation has been updated and provided to the state will fulfill this deliverable.**

Question 34:   Is it the state's intent to have the proposer to not submit references or project contacts?

Answer to question 34: **References are welcome as part of the Offeror's Organization and Staffing criteria referred to in Section 4, Technical Proposal and Section 6, Evaluation and Selection.**

Question 35: Can individual's experience (or individual qualifications for subcontractors) be counted as part of firm qualifications?

Answer to question 35: **Individual experience prior to joining the bidding organization does not equate to the bidding organization's experience. As such, individual experience prior to joining the bidding organization should be notated accordingly. However, that experience will be considered in the**

Offeror's Organization and Staffing section, and will still have some impact on the Previous Experience and Background section.

Question 36: Other than the specific details outlined in the SOW, does the state have a preference for more onsite presence by the QA vendor in Providence, RI? We have found that an onsite QA presence throughout the project is crucial to a successful implementation.

Answer to question 36: **No.**

Question 37:   Rows below each Task/Deliverable. Does the State require ALL of the QA resources to be listed under their respective tasks? Some tasks will require specialists to contribute to some of the tasks. Can the QA proposer use a blended rate / hour for each role as this provides the state with more flexibility?

Answer to question 37: **Blended rates cannot be used as the staff listed should serve as the back-up for how an applicant arrived at the deliverable cost.**

Question 38: Rows below Task 1.2. As this is a regular task submission, Project Status Reporting is throughout the 22 months. Can the proposer invoice the State per month? How should this be reflected in the Cost Summary Worksheet?

Answer to question 38: **Status Reports and Meeting Summary billing should be itemized and tied into the billing of whatever deliverables are in development/completed during that time period. The Cost Summary Worksheet should include the combined cost of these meetings, but the billing for these deliverables will be spread across the breadth of the project.**

Question 39:   IAPD. Can the state provide a copy of the IAPD submitted (and approved) by FNS, so that all vendors can have equal access to this information?

Answer to question 39: **Please see attached document, "RI Joint MIS EBT IAPD.docx"**

Question 40:   Can the State describe the roles, FTEs, and number of resources that it will be assigning to this project?

Answer to question 40: **There will be approximately 15 state agency staff involved in this project, including the WIC chief, WIC deputy chief, project manager, vendor manager, client services manager, finance manager, as well as other state agency staff who will be assisting at key points.**

Question 41:   Can you please share a copy of your IAPD?

      Answer to question 41: **Please see attached document "RI Joint MIS EBT IAPD.docx"**

Question 42:   Is there a not to exceed (NTE) budget for this project? If so please provide.

      Answer to question 42: **No.**

Question 43:   Have you used a planning vendor to create the system vendor RFP? If so please provide vendor name.

      Answer to question 43: **The MIS/SAM RFP was created by Maximus. The QA RFP was created by the State Agency.**

Question 44:   Please provide a copy of the RI approved IAPD. General

      Answer to question 44: **Please see attached document "RI Joint MIS EBT IAPD.docx"**

Question 45:   If possible, please define when the State intends to award the QA contract. General

      Answer to question 45: **By the end of 2017 (calendar year).**

Question 46:   If possible, please define when answers will be provided to questions. General

      Answer to question 46: **8/8/2017**

Question 47:   Please clarify the reference to the Rhode Island Health Benefits Exchange and the need for the Contractor to be an "*eligible entity*". Section 1 #16

Answer to question 47: **This item does not apply to this RFP.**

Question 48: "*The MIS and eWIC QA project task plan section following the summary provides detailed subtasks for each task. The section following the task plan contains a list of required MIS and eWIC QA project deliverables related to the task plan.*" A MIS RFP was provided but an eWIC RFP was not. Can the State please provide the eWIC RFP? SOW 1. MIS AND eWIC PROJECT PHASING

Answer to question 48: **There will be no eWIC RFP. The eWIC SOW is in development.**

Question 49: "*Bidders must propose a project work plan for both the MIS and eWIC efforts that meets or exceeds the requirements described below.*" Please clarify the level of detail required in the project work plan. Shall the proposed project work plan include all tasks and deliverables for the QA, MIS and eWIC Contractors? Or should the proposed project work plan only include QA project activities based on the T&I and eWIC project tasks? SOW 1. MIS AND eWIC PROJECT PHASING

Answer to question 49: **The proposed project work plan only include QA project activities based on the T&I and eWIC project tasks.**

Question 50:   Please clarify when the draft QA schedule is initially due and requirements on when updates must occur. On page 12, the text indicates an update is required "Th*is draft schedule would be updated at least 30 days prior to the project's initiation*." The QA Initiation is required to occur 10 days after contract execution but the QA Monitoring Plan that includes a draft schedule is required to be submitted "*The quality assurance monitoring plan(s) must be submitted within twenty (20) working days of the T&I and eWIC submissions of their final work plans.*" Please clarify when the draft QA schedule is initially due and requirements on when updates must occur. SOW 1. MIS AND eWIC PROJECT PHASING

Answer to question 50:   **Draft scheduled is due as part of the proposal, prior to contract execution. Then, when the TIC and eWIC work plans come through, QA will produce a monitoring plan that corresponds to the timelines set by eWIC/TIC.**

Question 51: Please clarify if the PM or QA Contractor will be responsible for maintaining the project risk log. a. TASK 1

1.4 Risk Assessment and Management Plan

Answer to question 51: **QA Contractor**

Question 52: If the QA Contractor determines that there are no deficiencies in the final version of a deliverable, is a technical memorandum required? b. TASK 2

2.1

c. TASK 3

3.3

> Answer to question 52: **In the event no deficiencies are found, a technical memorandum confirming this is required from QA.**

Question 53: In most WIC implementation projects, the review and evaluation of deliverables is conducted using a Comment Log. Is a Comment Log adequate to satisfy the review of each deliverable or is a more formal multi page report desired? b. TASK 2

2.1

c. TASK 3

3.3

> Answer to question 53: **This would be OK, but the State Agency needs to confirm the format and fields used.**

Question 54: Section 3.3, Deliverable 9, requires the review of eWIC design documents. Please confirm that it is not within scope to review any MIS design documents, other than what is listed in Task 2, deliverable 6.

c. TASK 3

3.3 Review and Evaluate eWIC Design and Technical Specifications Documents

> Answer to question 54: **Confirmed. As it is a State Agency Model (SAM), a system design review is not needed.**

Question 55: Please clarify if QA attendance is required onsite or by conference call for the System Operations Support and Training.

e. TASK 5

5.4 Monitor and Evaluate System Operations Support and Training

> Answer to question 55: **On-site attendance for task 5.4 is required.**

Question 56: Please clarify the duration (number of days) of the System Operations Support and Training.

e. TASK 5

5.4 Monitor and Evaluate System Operations Support and Training

> Answer to question 56: **Currently estimated at 10 working days (two weeks).**

Question 57:   This section defines a UAT Plan focused on solely the UAT period and the QA efforts to manage the user testing. Please confirm if State PM or QA contractor is responsible for creating the "*Complete and Final Test Plan*" defined in the USDA-FNS 901 Handbook v2 that will utilize information from the Test Plans created by each Contractor.
e. TASK 5
5.5 Develop UAT Plan

Answer to question 57: **The final test plan is the responsibility of the QA Contractor.**

Question 58:   Task 6 relates to retailers; however, the requirement 6.3 defines that the testing relates to the "eWIC system." Please clarify whether this requirement refers to the eWIC system or a retailer's point of sale system that includes eWIC functionality.
f. TASK 6
6.3 Attend and Evaluate System Pre-Test

Answer to question 58: **The retailer's point of sale system.**

Question 59: Please clarify whether this activity will occur on site or by conference call.
f. TASK 6
6.3 Attend and Evaluate System Pre-Test

Answer to question 59: **On site.**

Question 60:   Please clarify whether the "System Pre-Test" is the live shopping conducted in stores, otherwise known as Level 3 testing or Level 2 in lab system testing.
f. TASK 6
6.3 Attend and Evaluate System Pre-Test

Answer to question 60: **Level 3**

Question 61: Please clarify whether the "On-Site Certification Testing" is the live shopping conducted in stores, otherwise known as Level 3 testing.
f. TASK 6
6.4 Review and Evaluate On-Site Certification Testing

Answer to question 61: **Level 3**

Question 62: Please clarify if the following certification testing session refers to in lab system testing also known as Level 2 testing. "*This may include, at the State's request, the QA*

Contractor's on-site participation in one or more certification testing sessions, estimated to require a visit of three (3) days and two (2) nights per session."
 f. TASK 6
6.4 Review and Evaluate On-Site Certification Testing

> Answer to question 62: **Level 3**

 Question 63:   Please clarify the duration (number of days) for the Pilot Training.
 g. TASK 7
7.3 Monitor and Evaluate Training

> Answer to question 63: **Currently estimated at 5 working days.**

 Question 64: Please confirm that there is no expectation for on-site QA support during pilot. g. TASK 7
7.3 Monitor and Evaluate Training

> Answer to question 64: **QA is expected to attend and evaluate during task 7.3.**

 Question 65:   If the pilot area has been determined, will the State please identify the geographic area for pilot? g. TASK 7
7.4 Monitor and Evaluate System Pilot Test

> Answer to question 65: **The pilot WIC agency location will be in Newport, RI, but retailers statewide will have eWIC functionality prior to the start of Pilot.**

 Question 66:   Will the State please identify where the 5 weeklong training events will occur? g. TASK 7
7.7 Provide Assistance with Training for Rollout during Pilot Test

> Answer to question 66: **A venue has not yet been determined, but will be in central Rhode Island.**

Question 67:   If the number of rollout areas, geographic areas and/or sequence have been determined, will the State please provide? h. TASK 8 -ROLLOUT

> Answer to question 67: **Rollout will not be done on a regional basis, so that no one region will be without WIC services for an entire week. Each rollout will include agencies from across the state, and these groupings have not yet been determined.**

Question 68:   Please confirm that there is no expectation for on-site QA support during rollout except 8.3 Assist in End User Training During Rollout. h. TASK 8 -ROLLOUT

> Answer to question 68: **Not confirmed. On-site QA support is specified in each TASK 8 subtask.**

Question 69:   How many Rhode Island WIC staff are expected to participate in this training?
h. TASK 8
8.3 Assist in End User Training During Rollout

> Answer to question 69:   **All WIC Local Agency staff will receive training (approximately 125).**

Question 70:   Please define where these trainings shall occur.
h. TASK 8
8.3 Assist in End User Training During Rollout

> Answer to question 70: **A venue has not yet been determined, but will be in central Rhode Island.**

Question 71: Will the State please describe what type of response is expected by the offer for this? CLAS

> Answer to question 71: **CLAS standards are required boiler plate language for all contracts funded by federal funds and it is the responsibility of the organization to have these items in place to support cultural and linguistically appropriate services in health care.**

Question 72:   Please clarify if resumes can be included as Appendices to the Technical Proposal. Section 8 Response Contents, #3

> Answer to question 72: **Confirmed, it may be added as an appendix.**

Question 73:   Please clarify if the proposed project work plan can be included as Appendix to the Technical Proposal. Section 8 Response Contents, #3

> Answer to question 73: **Confirmed, it may be added as an appendix.**

Question 74:   Please clarify if the listing of similar and/or related projects can be included as Appendix to the Technical Proposal. Section 8 Response Contents, #3

> Answer to question 74: **Confirmed, it may be added as an appendix.**

Question 75:   Please provide a list or additional description of information that can be included as Appendices to the Technical Proposal. Section 8 Response Contents, #3

> Answer to question 75: **Any information a bidder deems relevant to their proposal may be included as an appendix to the Technical Proposal.**

Question 76:   Please confirm that the Technical Proposal: that includes Offeror's Organization and Staffing, Work Plan/Approach, and Previous Experience and Background; shall not exceed 6 pages. Section 8 Response Contents, #3

> Answer to question 76: **The Technical Proposal may be considered a basic overview, with references to appendices which may be added as needed for relevant documentation.**

Question 77:   In the introductory paragraph, there is reference to the implementation of the bidder's system. Since this RFP relates to the provision of QA services, what are the State's expectations as the nature of the bidder's system? Appendix A

> Answer to question 77: **The state does not expect any additional hardware or software will be required for QA.**

Question 78:   The cost sheet cites two Task 5.7 items while the scope of work only includes one item. The first reference to 5.7 on the Cost Sheet is "5.7 Technical Memorandum Documenting UAT Support Provided" which may be a duplicate of "5.9 Review & Evaluate T&I and eWIC UAT Reports and Pilot Readiness Certifications/Independent Certification of Readiness for Pilot."   Please confirm whether the first reference to 5.7 on the cost sheet should be deleted. Appendix A & B

> Answer to question 78: **The Scope of Work does include reference to both deliverables. The Technical Memorandum Documenting UAT Support Provided refers to Deliverable 20: Support UAT.**

Question 79:   Please confirm that the cost that shall be identified for 1.2 Total Project Status Reports and Meeting Summaries will be a total for the entire 22-month period. Appendix A & B

> Answer to question 79: **Confirmed.**

Question 80:   Please confirm if the labor cost for 6.3/ Deliverable 26 should be included on the Cost Proposal table. Appendix B

Answer to question 80: **Confirmed**.

Question 81:   Please confirm if the labor cost and travel cost associated with 5.7 / Deliverable 20 – Support UAT and 6.4 / Deliverable 27 – Review and Evaluate On-Site Certification Testing, should be included on the Cost Proposal table. Appendix B

Answer to question 81: **Confirmed.**

Question 82:   The appendix cites "*All deliverables must be accounted for and a cost associated with each task at a fully loaded hourly rate.*" However, the bottom of the Cost Sheet includes lines for travel costs. Please clarify how travel costs should be represented on the cost sheet. Appendix B

Answer to question 82: **Travel costs will be a separate cost from the deliverables and therefore should be documented on Appendix B separately.**

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Rhode Island MIS Planning Project

Deliverable 4:

Joint MIS & eWIC Implementation Advanced Planning Document

May 17, 2017

Version 8

Transmittal Letter

This section will contain the transmittal letter to FNS when Rhode Island WIC submits the IAPD for review.

Contents

Table of Exhibits

Version History

Version #	Date	Document Change	Responsible Party
0.1	10/12/2016	Initial Draft	Mary Hinderer Sarah Newhouse Peter Relich
0.1	11/14/2016	Submission to RI WIC	Mary Hinderer
2.0	12/13/2016	Revised based on RI WIC comments	Mary Hinderer Lauren Dalton Sarah Newhouse
3.0	12/27/2016	Revised based on second round of RI WIC comments	Mary Hinderer Peter Relich Lauren Dalton
4.0	01/05/2017	Updated costs based upon updated budget, accepted all previous changes	Mary Hinderer Peter Relich
4.0	01/10/2017	Approved by RI WIC	Mary Hinderer
5.0	2/17/2017	Response to FNS comments	Mary Hinderer Peter Relich
6.0	3/27/2017	Response to FNS Comments	Mary Hinderer Peter Relich
7.0	4/28/2017	Response to FNS Comments	Mary Hinderer Peter Relich
8.0	5/17/2017	Approved by FNS	Mary Hinderer

Exhibit 1: *Version Control*

Acronyms and Abbreviations

Exhibit 2: *Acronyms and Abbreviations*

Acronym	Definition
ARU	Automated Response Unit
BCPS	Business Capacity Planning Study
CMA	Currier, McCabe & Associates
CSC	Computer Sciences Corporation
CPCM	Cost Per Case Month
CVV	Cash Value Voucher
DFDD	Detailed Functional Design Document
DoIT	Department of Information Technology
EBT/eWIC	Electronic Benefits Transfer
ESC	Executive Steering Committee
FNS	Food and Nutrition Service
FReD	USDA FNS Functional Requirements Document
HTML/HTTP	Hyper Text Markup Language/ Hypertext Transfer Protocol
IAPD	Implementation Advanced Planning Document
ICC	Integrated Circuit Chip
JADS	Joint Application Design Session
M&E	Maintenance and Enhancement
MIS	Management Information System
NCS	Northeast Coalition of States
NSA	Nutrition Services and Administration
OA	Operational Adjustment
PLU	Price Look-up Code
PMBOK	Project Management Body of Knowledge
POS	Point-of-Sale
PWP	Project Work Plan
QA	Quality Assurance
RDBMS	Relational Database Management System
RFP	Request for Proposals
RI	Rhode Island
RIFDA	Rhode Island Food Dealers Association
SaaS	Software as a Service

Acronym	Definition
SAM	State Agency Model
SNAP	Supplemental Nutrition Assistance Program
TIC	Transfer & Implementation Contractor
TIG	Technical Implementation Guide
TPP	Third Party Processor
UAT	User Acceptance Test
USDA	United States Department of Agriculture
WAN	Wide Area Network
WIC	Special Supplemental Nutrition Program for Women, Infants and Children
WOW	WIC on the Web
WUMEI	WIC Universal MIS EBT Interface

1 Executive Summary

The Executive Summary describes at a high level the business needs of Rhode Island for a new information system, identifies their key stakeholders, and summarizes the impacts of the proposed system and approach. It also introduces the concurrent approach to implementing both electronic benefits transfer (EBT, or eWIC, the terminology used in this document) and their Management information System (MIS) in Rhode Island simultaneously.

1.1 General Information

This Implementation Advance Planning Document (IAPD) describes Rhode Island (RI) Women, Infants and Children (WIC) Program's plans to replace their current management information system (MIS) known as RIWEBS with an eWIC functional system. RI WIC will also use a concurrent approach to their MIS replacement by rolling out eWIC to meet the EBT Mandate set forth by the Healthy Hunger Free Kids Act of 2020 at the same time. This joint MIS and eWIC IAPD has been developed in accordance with the United States Department of Agriculture (USDA) Food and Nutrition Services (FNS) 901 Handbook.

RI WIC plans to contract with an eWIC provider through the Northeast Coalition of States (NCS) EBT purchasing agreement. Xerox currently holds the NCS EBT master agreement. RI WIC recognizes that a concurrent implementation of a new MIS and eWIC increases risk in some areas. However after careful consideration, it was determined that this is the best approach that allows RI WIC to meet the federal mandate while ensuring their MIS is fully capable of supporting eWIC.

1.2 Program

The Executive Steering Committee (ESC) includes the RI WIC Director and Project Manager as well as representatives from each area of RI WIC including fiscal, vendor, clinic operations, and program administration. This team has been deeply involved in every aspect of MIS and eWIC planning. In addition, State agency staff and Local Agency staff will be involved throughout all phases of MIS and eWIC implementation.

RI WIC plans to meet all requirements for sufficient IT capabilities in accordance with the FNS requirements listed in the FNS Functional Requirements Document (FReD), under the NCS master agreement, and the WIC Universal MIS EBT Interface (WUMEI). The selected system, Crossroads, is considered FReD compliant, as it includes all of the functionality recommended for a WIC MIS. The eWIC system, Xerox, is fully operational in other states and has been successfully interfaced with Crossroads previously. In addition, RI WIC has performed a thorough requirements analysis during the planning phase to ensure that the MIS will meet all requirements for the IT capabilities desired by Rhode Island.

1.3 Financial

With the exception of current WIC staff hours, RI WIC expects the entire cost of the MIS and eWIC project to be funded through FNS technology funds. RI WIC will request a technology grant specific to WIC Management Information System (MIS) transfer and eWIC implementation. RI WIC Labor costs will be covered by the primary WIC grant known as the Nutrition Service and Administration (NSA) grant. As part of the NSA funding methodology, states may request earmarked funds for special projects from the regional operational adjustment fund. No state general funds will be requested for startup or ongoing costs of this system. No cost allocation plan is needed as no other entities in Rhode Island will be sharing the Crossroads system or the eWIC technology.

The costs below provide the estimated costs for the Transfer and Implementation Contractor (TIC) for a combined WIC MIS and eWIC implementation effort. For more information about the costs and the assumptions used, refer to Section 10: Proposed Budget.

WIC MIS & eWIC Implementation	Total
Funding Source	
FNS Funding - WIC MIS	1,888,569
FNS Funding - eWIC	643,007
NSA Funding	1,080,943
Operational Adjustment	0
Total Receipts	**3,612,519**
Outlays / Expenditures	
SA Personnel - WIC MIS	
Rhode Island Project Manager	104,671
Rhode Island Labor	219,038
SA Personnel - eWIC	

Rhode Island Project Manager	68,544
Rhode Island Labor	524,597
SA Personnel Total	**916,850**
Contractor Costs - WIC MIS	
WIC MIS T&I Contractor - Implementation	1,147,792
WIC MIS T&I Contractor - Operations	119,922
WIC MIS QA Contractor	264,000
Contractor Costs - eWIC	
eWIC Service Provider Implementation	282,829
eWIC Service Provider Ongoing	43,230
eWIC QA Contractor	176,000
Contractor Total	**2,033,773**
Travel	-
Travel	6,500
Travel Total	**6,500**
Equipment/Infrastructure Costs	
Hosting site hardware & software	0
Clinic WIC MIS Equipment	33,858
Clinic WIC Training Videos	50,000
Clinic eWIC Equipment	47,070
Materials Total	**130,928**

Miscellaneous	
Office Supplies	4,000
Miscellaneous/Other	2,400
Indirect Costs on MIS - rate of 18.50%	281,748
Indirect Costs on eWIC - rate of 18.50%	97,564
Indirect Costs on NSA - rate of 18.50%	138,756
Miscellaneous Total	**524,469**
-	-
Total Payments	**3,612,519**

Exhibit 3: *Summary of Estimated Costs*

1.4 Technical

Based upon system availability at the time of the initial feasibility study, RI WIC initially identified the following systems as potential candidates for a transfer system:

- Kansas CIMS (developed by CQuest)
- Maryland WIC on the Web ((WOW) developed by 3 Sigma)
- Crossroads SAM System (developed by Computer Sciences Corporation (CSC))
- HANDS System (developed by Currier, McCabe & Associates (CMA))

During the alternatives analysis, the following activities were conducted to focus the detailed analysis on the systems that best matched RI WIC's needs:

- Live demonstrations with the candidate systems
- Reviews of system functionality as compared to RI WIC requirements
- Analysis of system questionnaires sent to developers to get a more in depth view into the system architecture and performance, and
- A review of expected system costs, risks and benefits

Based on the analysis, the Crossroads system was determined to be the best transfer candidate for RI WIC. The complete details of the alternatives analysis are in Section 2: Feasibility and Alternatives Analyses.

1.5 Procurement

1.5.1 MIS Procurement

Based on the findings from the Feasibility Study, RI WIC will procure the Crossroads system in an outsourced environment and procure hosting services. As part of their planning contract, RI WIC will develop a request for proposals (RFP) for a TIC to implement Crossroads for statewide operation. The current RIWEBS contract began September 2015 with optional annual renewals until August 2021. The future TIC contract will include options annually for up to five (5) years to be exercised at the discretion of RI WIC.

1.5.2 eWIC Procurement

Rhode Island, as a member of NCS, has access to bulk pricing and a streamlined procurement process resulting from a regional procurement of EBT services. Often, small states, with small caseloads, find that EBT processing services can be cost-prohibitive given that current pricing structures rely on a cost per case month contract cost; because Rhode Island participated in this procurement with multiple other states, the cost per case month pricing is often lower given the larger number of caseloads across participating states. Xerox was selected by the NCS to provide WIC and Supplemental Nutrition Assistance Program (SNAP) EBT services; therefore Rhode Island will use the NCS agreement to procure these services. Xerox is fully operational in multiple states and has been successfully interfaced with the Crossroads system in Virginia.

1.5.3 Quality Assurance Contractor

To support the MIS and eWIC implementation effort, RI WIC will procure a Quality Assurance (QA) Contractor. The expectation is for QA to verify and validate that all product deliverables and services are complete and of the highest quality consistent with federal, industry, and state standards. RI WIC will develop an RFP and use a competitive procurement to accomplish this.

1.6 Security

Rhode Island WIC commits to comply with all FNS security requirements, including development of a disaster recovery and business continuity of operations plan.

2 Feasibility and Alternatives Analyses

This section contains an overview of the methods employed by RI WIC to objectively evaluate the best approaches for the transition to eWIC technology, and the selection of a new MIS.

2.1 Feasibility Study: eWIC Functionality in RIWEBS

As RI WIC began planning efforts for the transition to eWIC, they undertook an effort to determine if their existing system, RIWEBS, would be able to support eWIC functionality. RIWEBS is a web-enabled, centralized online application, using a single database system. RI WIC's eWIC Gap Analysis determined that there were several factors that indicated RIWEBS would not be able to successfully interface with eWIC technology.

- RIWEBS does not meet the required FReD functionality for eWIC
- RIWEBS is written in Visual Basic 6, not .NET Framework
- Microsoft ended support for Visual Basic 6 in March 2008, meaning additional development hours would be required due to the absence of support from Microsoft
- Extensive requirements gathering, design and coding would be required to enhance RIWEBS to meet the needs for eWIC implementation

2.2 MIS Evaluation / Alternatives Analysis

The findings from the eWIC planning effort led RI WIC to undertake the task of evaluating four (4) WIC MIS candidate systems. Prior to initiating the analysis, RI WIC became familiar with the required functionality identified in the FNS FReD, and gave thought to what other features they would prioritize in their selection of a new MIS. RI WIC focused on selection of a system that:

- Is a centralized, web-based application, that enables real-time information sharing, and serves as a platform across all agencies and functions
- Supports RI WIC's participant-driven service model
- Improves productivity within the State WIC Program Office and Local Agencies
- Reduces time and effort needed to implement the WIC Program
- Supports eWIC benefit issuance

The evaluation of these four (4) systems involved a multi-phase, comprehensive analysis focused on identifying an affordable solution that best meets the RI WIC Program's needs. *Exhibit 4: Candidate Systems Evaluated* illustrates which systems were considered in this analysis, and is followed by brief descriptions of the evaluation process.

System Name	Type	Developer
CQuest	Transfer	CQuest
HANDS	Transfer	Currier, McCabe & Associates (CMA)

System Name	Type	Developer
Crossroads[1]	SAM	CSC
Maryland WIC on the Web (WOW)	Transfer	3Sigma

Exhibit 4: *Candidate Systems Evaluated*

2.2.1 Exposure to Candidate Systems

RI WIC initially engaged in a number of activities to gain experience and familiarity with each of the candidate systems. Activities included:

- Participating in webinar-based demonstrations of each system
- Reviewing system functional and technical specifications, and using sandbox environments
- Conducting site visits or webinars with host states
- Reviewing information related to User's Group involvement

2.2.2 Functional Requirements Document (FReD) Evaluation

After gaining initial exposure to each of the systems, RI WIC used the FReD as a guide to evaluate how the candidate systems perform in each functional area. FNS created the FReD in order to provide states with a comprehensive description of functions that can be automated in an MIS to support WIC programs. The purpose of the document is to describe *what* the system must do, without specifying *how* it will be accomplished. It is meant to be a source of information for state agencies as they develop and enhance WIC MIS.

A summary of the function requirements by functional area is provided below in *Exhibit 5: Functional Requirements Evaluation Summary.* (The full functional requirements evaluation is included in Appendix A.)

Functional Area	Maximum Points	Crossroads	HANDS	3Sigma	CQuest
Certification	118	118	97	118	97
Nutrition and Health Services	26	24	13	18	10
Food Management	48	48	42	36	33
Food Benefit Issuance	54	54	54	54	54
Redemption, Settlement, Reconciliation	60	60	60	48	48

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[1] A State Agency Model (SAM) is a system that was developed under the FNS SAM initiative. These systems were developed with consortium models in mind and can receive priority funding. It is a FNS requirement that at least one SAM be considered during the planning phase.

Functional Area	Maximum Points	Crossroads	HANDS	3Sigma	CQuest
Financial Management	36	32	26	32	18
Caseload Management	36	24	24	24	24
Ops Management	68	57	48	49	46
Vendor Management	138	128	126	101	89
Scheduling	48	42	45	42	42
System Admin	64	58	58	58	52
Reporting	18	18	15	12	18
Total Score	**714**	**663**	**608**	**592**	**531**

Exhibit 5: *Functional Requirements Evaluation Summary*

CQuest scored significantly lower than the other systems in this stage of the analysis, and was therefore excluded from the next phase of the evaluation.

2.2.3 Business Capacity Planning Study

To properly evaluate the remaining three (3) candidate systems, MAXIMUS prepared a Business Capacity Planning Study (BCPS) to document RIWEBS' architecture, capacity, and transaction volume. This helped RI WIC determine their baseline functionality, and identify performance requirements for a replacement MIS in order to achieve similar or improved performance.

The BCPS determined that all three (3) systems met or exceeded the performance of RIWEBS. It was noted that RIWEBS had a slightly faster query service level in some instances, but the improved speed related to the completion of forms created efficiencies greater than speed lost in query response.

It was also noted that from the standpoint of configuration for maintainability and reliability, the only flaw noted was that multiple locations are not used to provide for backup response in the event of a natural disaster. Given this possibility, there should be a remote backup system and remote backup storage media. Modern cloud-based or virtual environments could provide more redundancy, and flexibility to configure when load or conditions change.

2.2.4 Developer Questionnaire

With the results of the requirements evaluation and baseline Business Capacity Planning Study, RI WIC understood that they needed more information to gain a better understanding of what considerations, beyond basic functionality, would benefit from additional information and clarification. To more deeply analyze the functional and technical capacity of the remaining candidate systems, MAXIMUS and RI WIC developed a questionnaire that system developers were asked to complete. (A complete version of the questionnaire is available in Appendix B). The completed questionnaires were thoroughly reviewed, and follow-up questions were asked as needed. *Exhibit 6: Summary of Developer Questionnaire Evaluation* illustrates the final scoring

outcomes from this evaluation of questionnaire responses. The numbers represent the quantity of questions within each category where it was determined the developer's response was determined to be the strongest. For example, if there were 5 (five) questions and Developer A provided the strongest response to four (4) and Developer B provided the strongest response to one (1) then Developer A would receive four (4) points and Developer B would receive 1 (one).

Category	CSC (Crossroads)	CMA (HANDS)	3Sigma (MD WOW)
Hosted System	8	7	1
System Architecture	5	1	0
System Configuration	7	3	3
Capacity Review	4	1	0
Telecommunications Requirements	0	1	0
Interfaces	1	0	1
Client Feedback	1	0	1
Other	18	8	3
TOTAL	44	21	9

- Highest Score, RI WIC's needs met
- Second place score, RI WIC's needs met
- Does not meet RI WIC's needs

Exhibit 6: *Summary of Developer Questionnaire Evaluation*

2.2.5 Evaluation Outcomes

Based upon this analysis, RI WIC determined that Crossroads and HANDS were the two (2) systems that could best meet the needs of the State. These two solutions were considered in the Cost Benefit Analysis that MAXIMUS prepared for RI WIC. After careful analysis, RI WIC chose to replace RIWEBS with the Crossroads system, and intends to join the Crossroads User's Group. Joining the User Group will put them in the best position to receive potential SAM funding from FNS, to leverage costs of system enhancements and maintenance, and to leverage other User Group member states testing support, which will be beneficial given that RI is a smaller state.

3 Cost Benefit Analysis

This section provides the cost analysis for the MIS and eWIC separately, as the two (2) analyses were conducted independently.

3.1 MIS Cost Benefit Analysis

Implementation and operational costs were obtained for the two alternatives that Rhode Island WIC considered viable following the functional and system analyses. These alternates were 1) HANDS in a hosted environment; and 2) Crossroads in a hosted environment. Following the cost benefit analysis provided in the Feasibility Study, Rhode Island ultimately selected Crossroads as their MIS solution, operated in a hosted environment. The following chart provides the estimated costs for implementation and the first six (6) months of operations for both alternatives, based on the information provided by the System developers and industry standards. Details regarding the costs used in the Feasibility Study can be found in Appendix C: Feasibility Study and Cost Benefit Analysis. For the purposes of this IAPD, estimated costs have been refined based on decisions made by Rhode Island and both the eWIC and MIS costs have been combined. For updated costs, refer to Section 10: Proposed Budget.

WIC MIS Implementation Costs		
Funding Source	**HANDS**	**Crossroads**
FNS Funding	1,438,858	1,388,728
NSA Funding	626,540	580,858
Operational Adjustment	6,500	6,500
Total Receipts	**$2,071,898**	**$1,976,086**
Outlays / Expenditures		
SA Personnel		
Rhode Island Project Manager	21,600	21,600
Rhode Island Labor	232,400	232,400
SA Personnel Totals	**$254,000**	**$254,000**
Contractor Costs		
WIC MIS TIC: Implementation	1,045,000	994,870
WIC MIS TIC: Operations	325,500	279,818
WIC MIS QA Contractor	360,000	360,000
Contractor Totals	**$1,730,500**	**$1,634,688**
Travel		
Travel	6,500	6,500
Travel Total	**$6,500**	**$6,500**
Materials		
Hosting Site Hardware & Software	-	-

WIC MIS Implementation Costs		
Funding Source	**HANDS**	**Crossroads**
Materials Total	-	-
Miscellaneous		
Office Supplies	4,000	4,000
Miscellaneous/Other	2,400	2,400
Clinic Computer Equipment	33,858	33,858
Infrastructure Improvements	-	-
Indirect Costs - rate of 16%[2]	40,640	40,640
Miscellaneous Total	**$80,898**	**$80,898**
Total Estimated Costs	**$2,071,898**	**$1,976,086**

Exhibit 7: *WIC MIS Implementation Costs*

Because the State has not put out a request for proposal (RFP) for the implementation of Crossroads WIC MIS, the costs for implementation are estimated. Making the cost even more difficult to estimate is the fact that Crossroads has not yet been implemented as a transfer system by any other State. The only states with experience with the system are those who originally implemented it (i.e., Virginia, West Virginia, Alabama and North Carolina). The assumptions used in building the estimated WIC MIS implementation costs are described in Section 10.2: Assumptions.

3.2 eWIC Cost Benefit Analysis

The eWIC Cost Benefit Analysis, conducted in 2012, evaluated five (5) eWIC alternatives:

- Alternative 1: Online, full service
- Alternative 2: Online, hybrid (shared responsibility)
- Alternative 3a: Offline, outsourced
- Alternative 3b: Offline, hybrid
- Alternative 4: Offline, state-hosted

These eWIC alternatives were evaluated based on known pricing in the market place and assumptions based on Rhode Island's size and capabilities. The eWIC planning contractor then reviews both tangible and intangible benefits.

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[2] A rate of 16% was originally provided by Rhode Island and used for the Cost Benefit Analysis as presented in this section. An updated rate of 18.5% was subsequently requested by Rhode Island and used in the budget calculations represented in Section 10. As this section is a summary of the CBA, the final CBA information has been used.

3.2.1 Intangible Cost Benefits

There is ample evidence that conversion from paper-based WIC food delivery to an eWIC system would provide significant benefits, including greater client convenience, enhanced food delivery system accountability, and a streamlined vendor settlement process. WIC implementations to date have shown that eWIC is affordable and preferred by all stakeholders. It is for these reasons that RI WIC had initially begun its pursuit of eWIC as part of the New England Partners Project, well before the national mandate.

3.2.2 Tangible Cost Benefit

Four (4) alternatives provide a reduction in operating costs over paper. They are:

- Alternative 1 (Online, outsourced solution)
- Alternative 2 (Online, shared hosting)
- Alternative 3a (Offline, outsourced hosting)
- Alternative 3b (Offline, shared hosting)

The fifth alternative, offline, in-house hosting, proved to be far in excess of current paper cost. That is largely due to the fact that adopting this solution would increase the state's labor and materials cost. Below are the estimated costs of the five (5) solutions as calculated in the original eWIC IAPD; for updated costs that reflect a combined implementation effort, refer to Section 10: Proposed Budget.

Anticipated Implementation Cost Comparison					
Cost Element	Alternative 1: Online Outsourced	Alternative 2: Online Hybrid	Alternative 3a: Offline Outsourced	Alternative 3b: Offline Hybrid	Alternative 4: Offline Hosted
Retail Enablement	480,000	480,000	2,400,000	2,400,000	2,400,000
eWIC Cards	Included in Service Contract	Included in Service Contract	Included in Service Contract	56,160	56,160
eWIC Sleeves Books	Included in Service Contract	Included in Service Contract	Included in Service Contract	Included in Service Contract	6,660
Local Unit HW/SW Materials	Included in Service Contract	Included in Service Contract	Included in Service Contract	Included in Service Contract	11,700
Host HW/SW Materials	Included in Service Contract	Included in Service Contract	Included in Service Contract	Included in Service Contract	150,665
eWIC Service Contractor/Bank	300,000	300,000	300,000	300,000	50,000
MIS Contractor	120,000	120,000	300,000	300,000	600,000
QA Contractor	175,000	175,000	200,000	200,000	250,000

Anticipated Implementation Cost Comparison					
Cost Element	Alternative 1: Online Outsourced	Alternative 2: Online Hybrid	Alternative 3a: Offline Outsourced	Alternative 3b: Offline Hybrid	Alternative 4: Offline Hosted
Total Estimated Implementation Cost	$1,075,000	$1,075,000	$3,200,000	$3,256,160	$3,525,185

Exhibit 8: *Anticipated Implementation Cost Comparison*

3.2.3 Findings

The eWIC planning project feasibility and cost study determined that conversion from paper-based WIC food delivery to eWIC would be affordable, and provide significant benefits, including greater client convenience, reduced food delivery costs, and a streamlined vendor settlement process. The findings indicated that an online processing system, using magnetic-striped cards and operated by a financial services contractor, or an online, outsourced solution, offers the most advantageous solution for eWIC in RI.

4 MIS General System Design

The system requirements for Crossroads were defined by a consortium led by the state of North Carolina, and included Alabama, Virginia and West Virginia. Crossroads is a robust system that manages all facets of WIC operations, including client services and vendor management. Crossroads uses modern web (HTML/HTTP) technology, standard WIC data elements, and complies with federal policy and regulations. There are a number of factors that influence the design of the infrastructure for Crossroads, including:

- Standards, policies, and procedures enforced by the state or entity that owns the data center where the application is installed
- Professional practice for configuring networking equipment and devices
- Requirements enforced by the system design
- Requirements enforced by known or expected system usage patterns

In addition, deployment environments may vary slightly. To the extent possible, this section will provide detailed information on the design of the Crossroads system. For more detailed information, see Appendix D: Crossroads WIC Project Configuration Plan.

4.1 System Architecture

The Crossroads system uses the following model:

- **Client**: Crossroads is a client-server application. A centralized set of servers hosts Web services used by the client. The client portion of the application is deployed to end users via Microsoft's Click Once technology, which allows updates to be automatically downloaded when they are made available. The client is downloaded from and installed on client machines in clinics and RI WIC offices. The system uses a centralized data model and requires constant connectivity between clients and servers to function. Crossroads can be restricted to a private state network or it can be accessed over the Internet, depending on Rhode Island requirements.
- **Presentation:** The client includes a rich interface expressly designed for WIC. The client application is responsible for formatting and display of data to the user.
- **Business:** Business logic is contained in the web services layer of the system. The client contains limited business logic to facilitate interaction with the services.
- **Data Access:** The data access layer uses Microsoft Entity Framework to facilitate database access by the Web services.
- **Relational Database Management System (RDBMS):** The system uses Microsoft SQL Server 2012 or 2014 as the RDBMS.
- **Licensing Requirements:** There are no up-front or on-going licensing costs other than those incurred for the server and client operating systems and SQL Server.

The following diagram shows an architectural overview of the Crossroads system.
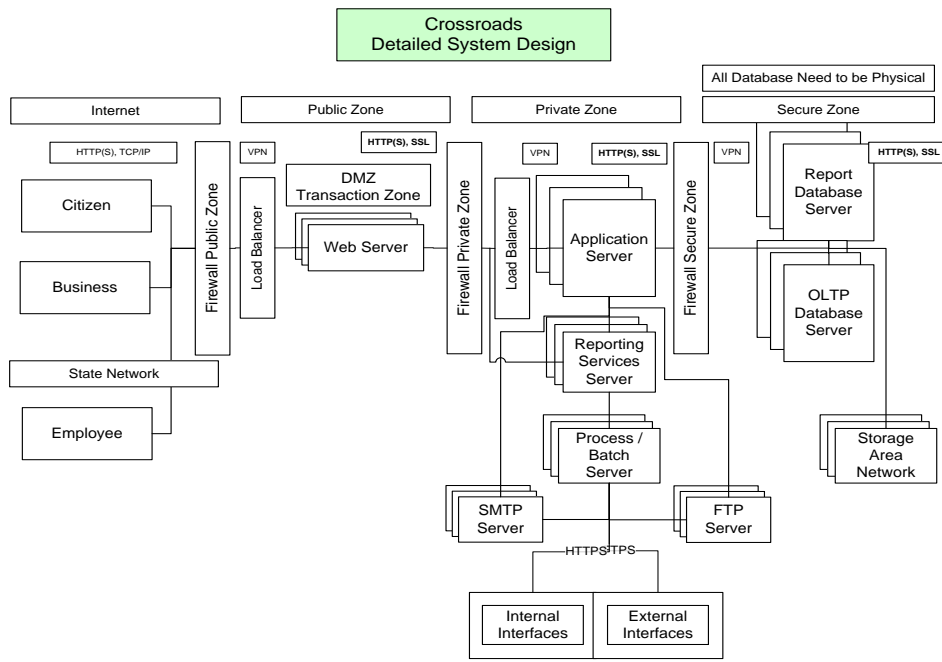
Exhibit 9: *Crossroads Architectural Overview*

4.2 Operating Environments, Equipment and Resource Needs

The Crossroads system will be hosted by a maintenance and operations (M&O) contractor. The hosting environment will be reviewed by Rhode Island during the procurement process using both technical and cost considerations.

The Crossroads system will also be required to conform to all State and department technical standards. Because the existing system runs on Windows-based PCs, RI anticipates that some existing equipment may be able to be leveraged with the system replacement due to the web-based nature of the system. Because Rhode Island will use hosted services, it is not expected that current resources will be significantly impacted.

4.3 System Performance Requirements

Rhode Island requires Crossroads to meet or exceed the current system performance. Details regarding those performance measures and the ability of the Crossroads system to exceed them can be found in Appendix E: Business Capacity Planning Study.

5 Project Management Plan and Resource Requirements

This section will discuss the project oversight and reporting requirements of all contractors and entities involved.

5.1 Overview

RI WIC will contract with a qualified TIC for implementation support and hosting services. It is expected that the TIC will make all necessary system configurations, design and potentially develop[3] the required interface from Crossroads to KIDSNET[4], and fully support RI WIC during system testing, pilot and statewide rollout. In addition, this joint MIS/eWIC project will fully utilize all of the limited in-house staff resources for day-to-day project management throughout the project. WIC MIS and eWIC implementation projects are complex, require review and approval of many detailed and diverse deliverables, and involve a significant degree of risk. For this reason, RI WIC anticipates the need for additional support, and will contract with a firm to provide QA services. The QA contractor will review all of the implementation contractor's deliverables, monitor adherence to the project schedule, support the UAT cycles, and provide general project and risk management oversight. In addition to the QA review, RI WIC staff, including the State WIC Director, State Project Manager, appropriate WIC program and support IT staff, will review all deliverables. The WIC Project Manager will have direct supervisory responsibility for all three contracted entities and will be responsible for enforcing the terms of the contracts. RI WIC will use formal project management methodologies to manage the project. Project management tools, such as those found in the Project Management Body of Knowledge (PMBOK) have been implemented during the planning phase to manage scope, quality, cost, schedule and lessons learned and will continue to be used throughout the implementation phase.

5.2 Project Staffing Roles and Responsibilities

The following chart depicts the anticipated organizational structure of the entire MIS/eWIC implementation project, including executive oversight, project management, QA, and eWIC services provider and TIC.

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[3] If the interface requires code changes to Crossroads, the TIC may be limited in their ability to develop the interface. This event has been outlined within the TIC Statement of Work.

[4] KIDSNET is a RI health system utilized by WIC for immunization and lead data on participants. This is a bi-directional interface and it is currently available with RIWEBS.
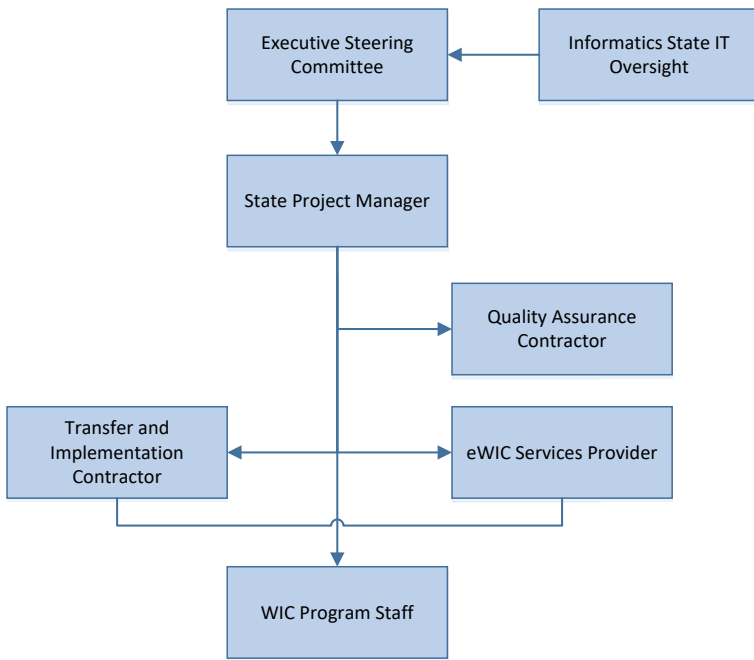
Exhibit 10: *MIS/eWIC Implementation Project Organizational Structure*

5.2.1 Executive Steering Committee

The ESC will be made up of key decision makers, advisors, and contributors from the State. This committee will provide executive oversight, strategic guidance, high-level problem resolution, executive communications, and adequate resource allocation.
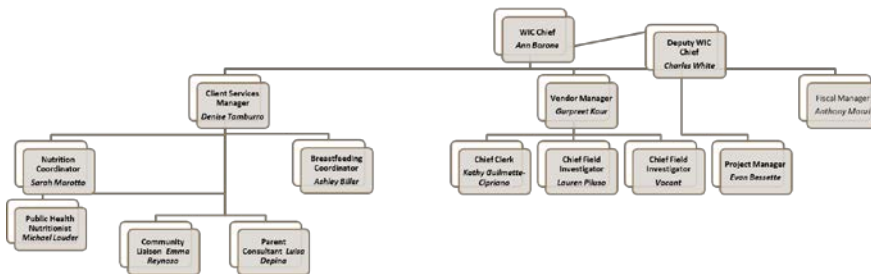
Exhibit 11: *Executive Steering Committee Organizational Structure*

5.2.2 Project Manager

The project manager for the eWIC pilot will be Mr. Evan Bessette. Mr. Bessette is a state IT Project Manager in the WIC program and is an experienced technologist with demonstrable system implementation experience, and a strong record of project management leadership. He is knowledgeable about the methodologies under which such procedures should be undertaken to maximize success. Prior to undertaking the assignment of eWIC project manager, Mr. Bessette was responsible for orchestrating the connection of a statewide children's health database to the WIC MIS for the purposes of mutual data access and exchange, as well as managing the WIC data sets within that children's health database, giving him considerable, in-depth knowledge of WIC systems. Before that, Mr. Bessette was instrumental in the rollout and implementation of a new birth certificate issuance system used throughout the state.

5.2.3 Staffing and Project Management

In addition to Mr. Bessette, there are six (6) additional staff members, and subject matter experts, assigned to the implementation of eWIC in Rhode Island. This chart depicts the roles and responsibilities for the joint implementation project.

Project Staffing Roles	
Position	**Role**
Rhode Island WIC Director – Executive Sponsor	The WIC Director keeps the Agency Project Administrator apprised of progress and serves as primary contact with USDA.

Executive Steering Committee (ESC)	Some of the duties performed by the ESC include:
	• Overseeing the project in terms of the contract and work order agreements, charter, and project management plan elements, such as:
	  - Monitoring that contractual deliverables are being provided
	  - Monitoring the project schedule and the consequences of any timeline setbacks
	  - Determining if the project timeline can be recovered (if timeline setbacks do occur) and what actions are necessary to do so
	  - Monitoring project expenditures and the overall project budget
	• Recommending approval of any scope changes, or any changes that affect cost and scheduled based on cost benefit to the Agency Program Administrator
	• Making final recommendations to the RI Department of Health

Project Staffing Roles	
Position	**Role**
WIC Project Manager	This is the person that will serve as the single point of contact with the TIC, eWIC, and QA contractors. The Project Manager has direct communications and reporting relationship with WIC QA contractor to ensure goals are maintained, communicate the latest information, and to hold the TIC and eWIC services provider accountable for contracted tasks and activities. The WIC Project Manager coordinates with all State staff and contractors.
QA Contractor	Some of the duties performed by the QA Contractor are: • Providing oversight of the project plan. The QA Contractor is in close daily contact with the WIC Project Manager, outside vendors, and ESC, and regularly reviews the project status to ensure that all requirements are fulfilled and on schedule • Advising, and recommending changes in work direction to the WIC Project Manager • Reviewing work plans for the transfer of the system and eWIC implementation and reviews milestones, resource allocations and system development strategy and reporting requirements based on assigned tasks • Coordinating activities with the WIC Project Manager, outside vendors and USDA FNS, as requested by RI WIC • Working closely with State Office users, Local Agency users, and other internal stakeholders as required by the project • Project reporting and documentation reviews • Serving as the primary point of contact for WIC issues during project planning, development and implementation • Participating in project status meetings • Gathering information through contact with other State programs, IT specialists, and USDA • Provide monitoring and assistance as needed with training during statewide rollout **Reports to**: WIC Project Manager

Project Staffing Roles	
Position	**Role**
WIC Program Staff	Duties performed by the WIC Program Staff include: • Assisting the WIC Project Manager and WIC QA Contractor as needed • Providing subject matter expertise • Reviewing and provide comments on deliverables, as needed • Participating in system user acceptance testing • Updating policies to support changes to the system • Supporting training of local level staff by communicating policy changes that will be made to support the system **Reports to**: WIC Project Manager

5.3 Technical Resources

This section describes the needed hardware and software for the MIS and eWIC implementation projects.

5.3.1 MIS Hardware

Although at the outset of this project, Rhode Island will need to procure additional printer/scanners to optimize the functionality of the new MIS and eWIC processing services, Rhode Island has a lifecycle replacement program where equipment is replaced at least every three to four years. Any future equipment needs will be procured using the standard replacement process and NSA funds. It is expected that, because the system will be in a hosted environment, no other hardware purchase should be necessary.

The WIC Project Manager will spearhead the purchase of printer/scanners according to specifications required by the transfer system and in accordance with State hardware equipment procurement policy.

5.3.2 eWIC Hardware

Rhode Island assumes the following equipment will be necessary for the clinics to be eWIC functional:

Item	Number of Units
Magnetic Card Readers	130
PIN Selection Devices	78

Exhibit 12: *eWIC Hardware*

Stand-beside POS terminals for vendors that do not have eWIC integrated store systems will be leased from the eWIC service provider. Because of the size of the State and unknowns about the

pilot, an assumption was made that all vendors requiring stand-beside devices would be equipped prior to the pilot.

Although it is the intention of RI WIC to encourage all vendors to become integrated, specifically large vendors, the last vendor survey (2012) revealed approximately 165 stand-beside stores that would use separate POS devices for eWIC. During contract negotiations, RI WIC will engage in planning discussions with their eWIC service provider regarding vendor enablement. The NCS scope of work is vague in many areas, including the roles and responsibilities regarding vendor enablement, so many of the details remain to be determined. Shortly after contract execution, RI WIC intends to survey or have their eWIC service provider survey the existing vendors to confirm their equipment needs for stand-beside POS terminals.

5.3.3 Software

The centralized browser-based design of the transfer system requires no specialized software (except for an Internet browser, drivers for the magnetic card readers and PIN selection devices, and Adobe software for report production) to be installed on the hardware in local WIC agency sites or at the State office. The operating systems currently in use are compatible with known transfer systems, which lessen the chance of software conflicts.

This project does not include developing any office automation functions, although some State office components of the system may link to office automation software, such as Microsoft Word or Excel, for the generation of letters or reports. The equipment at local WIC agency sites and the State Office already have and use such software. It is not anticipated that purchase of any other office automation software will be required for the transfer system.

6 Security Planning

Rhode Island's Division of Information Technology (DoIT) provides guidance and oversight to state IT staff related to implementing and maintaining cost-effective safeguards that protect WIC participant data. DoIT has established, detailed security policies that set requirements for maintaining system and network security, data integrity, and confidentiality. RI WIC is committed to working with both the TIC and eWIC services provider to develop a consolidated Security Plan that addresses all of the requirements outlined by USDA FNS in the 901 Handbook, Section 8.0, System Security. This Security Plan will meet standards and conventions of USDA FNS, DoIT, and the Industry. The following areas will be addressed:

- Application Level Security
- Assignment of Security Responsibility
- Continuity of Operations Plan
- Data Center Policies
- Data Conversion
- Data Integrity
- Disaster Recovery Plan
- Established Policies - Security Policy & Procedures
- eWIC Host Disaster Recovery Plan
- eWIC Retail Level Security
- Hardware/Software Maintenance & Upgrades of Production Equipment
- HIPAA
- Internet Network Security Policies
- Performing Backups
- Passwords
- Patient Privacy
- Related Laws/Regulations/Policies
- Separation of Duties
- Site Plan
- State Helpdesk Operations
- System Environment Security
- System Interconnections/Information Sharing
- WIC System Disaster Recovery Plan

7 Training Plan

All system users will require training on the Crossroads system and eWIC prior to rollout to become comfortable using the new system. Effective training of system users will minimize the interruption in the delivery of services to participants. This section will outline how all system users - including State staff, State IT, clinic staff - will be trained in the appropriate areas of the system for their roles. It also addresses how the transition to eWIC will be shared with those staff, as well as WIC-authorized vendors and participants.

7.1 Training Objectives and Methodology

The objective of developing a sound training methodology is to prepare state and Local Agency staff to effectively use the Crossroads system, and to ensure that they, along with vendors and program participants, are prepared for the transition to eWIC benefit issuance. RI WIC will require several different types of training to accommodate different audiences and learning styles. Training materials, video modules and updated policies will support the training experience.

7.1.1 Written Training Materials

The TIC will be required to provide comprehensive, Rhode Island-specific written training materials for use during UAT, Pilot and Rollout trainings. RI WIC is using a "train-the-trainer" approach; thus the TIC will also develop training guides to assist "Super Users" in providing system training for other state agency staff. The TIC will work with the eWIC services provider to ensure that training materials are inclusive of eWIC functionality. It is expected that the TIC, in conjunction with the eWIC services provider, will update these materials as needed after each training cycle to ensure that they include the most up-to-date training information. The QA contractor will review and provide feedback about all training materials to RI WIC. The TIC will conduct a walkthrough for the ESC of all training materials to be used throughout the process prior to the ESC's final approval of the documents. Training materials may include, but are not limited to:

- Training agenda
- Step-by-step instructions and learning aids, with screenshots that illustrate system functionality
- User specific data to be used for training scenarios
- Quick reference system guidance

In addition, RI WIC will develop updated policies and procured and provide training materials to reflect the changes. While changes will be communicated to clinics and state office staff prior to the formal system training, these materials will also be combined with the TIC training materials to ensure end to end training for all WIC staff.

7.1.2 Recorded Training Modules

Pre-training video modules, created by the TIC or an independent contractor, will be available for Local Agency staff to review independently, at their own pace, prior to attending in-person, hands-on training. These modules will remain available to staff for review after the pilot, and throughout system rollout, in the event end users would benefit from reviewing them as a refresher.

7.1.3 TIC Training

The TIC will be required to receive training from the eWIC services provider on all eWIC processing functionality and outputs. This will ensure that the TIC is able to provide comprehensive training for subsequent training events. The NCS eWIC service provider scope of work is vague in many areas, including the roles and responsibilities regarding training, so many of the details remain to be determined. It is the intention of RI WIC to confirm details regarding the eWIC service provider's responsibilities in this area during contract negotiations.

7.1.4 UAT Super User Training35

The TIC will conduct a hands-on, interactive training one (1) week prior to UAT to prepare testers. In advance of UAT, the TIC will conduct a full system walkthrough that shows that the system functions identified in the FReD can be accomplished without error. Once approved, the TIC will conduct the UAT training. The QA contractor will be onsite during this training, and will be responsible for providing testers with guidance about UAT processes and procedures (e.g., how to read and perform scripts, how to record testing outcomes, how to report issues, etc.) As part of training, the TIC will perform a functional system overview, as well as task-oriented instruction for topics such as, but not limited to:

- How to search for a participant
- How to complete a certification
- How to issue a food package
- How to tailor food packages

Prior to this training, the TIC will ensure that ample "dummy data" is loaded in the system for demonstration/testing purposes. "Dummy data" may include a sample of converted data which will also allow RI WIC to test data conversion.

RI WIC is using a train-the-trainer approach to disseminate training information, and thus the individuals who participate in UAT training/UAT will become Super Users who will be responsible for training Local Agency staff in subsequent rollout areas. Approximately 15-20 individuals will become Super Users; the group will be comprised of members of the ESC, as well as Local Agency and State staff. To designate these Super Users, RI WIC will request that each Local Agency identify a long-time WIC employee that is a "go-to" person within the LA- a person that staff rely on for guidance and instruction. These Super Users will also be given training on changes to policies and procedures and may also have input during the design phase to ensure they have a full understanding of the impact of the implementation as well as system functionality.

7.1.5 Help Desk Training

RI WIC will employ a multi-layer Help Desk approach after the implementation of Crossroads and eWIC. State agency staff will serve as the level one (1) Help Desk and triage questions and complaints from vendors, clients, and clinics. Prior to UAT, a Help Desk training will be provided by the TIC to prepare Help Desk staff to field the types of questions they will be expected to support. Help Desk staff will also receive training on how to submit issues to the TIC and eWIC services provider. In the event there is a gap in the final schedule between this training and UAT, additional, abbreviated refresher training will be provided by the TIC on the same topics the week prior to UAT.

7.1.6 Pilot & Rollout Training Sessions

Prior to receiving in-person training, video modules will be made available to Local Agency staff to get a preview of the new system, and added eWIC functionality. This will be followed by comprehensive, in-person training sessions that will offer hands-on experience with Crossroads, and eWIC functionality. During these trainings, Local Agency staff will receive a functional system overview, as well as task-oriented instruction for topics such as, but not limited to:

- How to search for a participant
- How to complete a certification
- How to issue a food package
- How to tailor food packages
- How to perform scheduling tasks

These sessions will also provide time for training related to other system set-up activities, such as entering ranges of eWIC card numbers, or creating scheduling templates.

Using the training materials developed by the TIC, RI WIC Super Users will be responsible for training the remaining Local Agency users across the state. RI WIC plans to accomplish this by providing all users with a one (1) week, comprehensive training. Due to the size of Rhode Island, travel to attend these trainings will be minimal, and overnight accommodations will not be necessary for state staff.

- **One (1) Week, Comprehensive Training**
  - Pilot Group: Super Users will train approximately four (4) Local Agency staff from the Pilot area.
  - Subsequent Rollout Groups: RI WIC will roll out the remainder of the state in three (3) groups. During the Pilot period, a total of five (5) comprehensive trainings will be led by Super Users to train the remaining staff in these three (3) areas. These trainings will accommodate up to 20 Local Agency users per training event.
  - The TIC will not attend this training, but will be available for support by phone.

The Pilot group will roll out immediately following their one (1) week comprehensive training. However the three (3) remaining rollout groups will participate in a 3-day training refresher prior to their rollouts.

- **Three (3) Day Refresher Training**
  - On Monday-Wednesday of the group's "go live" week, refresher training will be led by Super Users. The affiliated clinic(s) will be closed during these three (3) days, and data conversion will simultaneously be completed by the TIC. Local Agencies will "go live" on Thursday of the same week.
  - Both the TIC and the QA Contractor will be onsite during these weeks to provide additional support.

7.1.7 Vendor Training

WIC-authorized vendors using stand-beside equipment will be trained by the eWIC services provider primarily through written materials that are shipped with stand-beside POS terminals provided to vendors by mail/overnight delivery. At the request of the vendor, these materials may also be provided in electronic format on disk or CD. If a vendor requests additional training, the eWIC services provider will provide assistance through the vendor Help Desk. If further resolution is needed, onsite training/support may be provided to vendors.

To support vendors that choose to integrate eWIC into their store POS equipment and utilize third party processors, the eWIC services provider is required to provide interface specifications that would enable vendors and third party terminal drivers to interface with the eWIC services provider to process eWIC transactions.

Vendors with integrated cash register systems generally have their own corporate trainers who train store-level personnel about system changes brought about by eWIC. In this case, RI WIC will require the eWIC services provider to assist in the training of these trainers, in order to assure that these stores are trained with the same uniformity as the smaller stores.

All authorized WIC vendors will be trained on RI WIC's Approved Product List, which will include the use of Price Look Ups (PLUs) for the implementation of the Cash Value Voucher (CVV) program. This training will come from the state agency and may be provided by webinar or make use of other standard communication channels such as newsletters.

All vendors using stand-beside equipment will receive additional training from the eWIC services provider on the following:
- How to process a WIC transaction
- How to obtain help through a toll-free customer service number
- How to obtain help through the processor's web portal
- How the Automated Response Unit (ARU) works
- eWIC terminal functionality (i.e. what eWIC functions does the eWIC terminal provide)

Prior to pilot and rollout, RI WIC will use state staff and contracted staff to conduct store visits to determine vendor readiness and provide supplemental training as necessary.

7.1.8 Participant Training

Local Agency staff will be responsible for training WIC participants. The TIC will not be engaged directly to train cardholders; however the eWIC services provider will work with the TIC to define the content of comprehensive training materials provided to Local Agency Staff and participants and provide training materials to RI WIC. Any written and digital client training materials will be created in English and Spanish. Participant training could include content such as:

- WIC eWIC transaction types including purchases and balance inquiries
- Printing a shopping list
- Use of the eWIC card at the point-of-sale
- Use and safeguarding of the card and PIN
- Card replacement and PIN change methods and procedures
- Guidance on reporting problems with the card and reporting a lost or stolen eWIC card
- Use of the transaction receipt to track remaining WIC benefits
- Use of the cardholder website functions including toll-free number to call if the cardholder is having a problem accessing the website
- Customer service functions, including the toll-free Customer Service Help Desk number and ARU

7.1.9 Training Evaluations

The TIC will administer a questionnaire at the conclusion of the trainings they conduct in order to identify lessons learned that may impact future trainings. The evaluation will include questions on the usefulness of information, training materials and resources, transferability of information to job, and the trainer's effectiveness. The TIC will provide all training feedback to RI WIC after the training event, and will be required to update training materials based upon these evaluations. The QA contractor will review the training feedback and make recommendations to RI WIC based on the information received.

7.1.10 Training Logistics

RI WIC will be responsible for coordinating the following training logistics:

- Procuring a venue for all training events
- Providing Local Agency staff with communication about training locations, dates/times, parking, room numbers and general training expectations
- Defining the three (3) rollout groups
- Informing Local Agency staff about pre-training video modules and setting expectations for completion of independent, pre-training activities

- Providing all hardware equipment for training sessions and UAT, such as computers, a projector, etc.

The TIC will be responsible for coordinating the following training logistics:

- Conducting a walkthrough of all written MIS training materials for the ESC, prior to UAT training, and obtaining state approval of the documents
- Providing the UAT test environment and test scripts, including "dummy data" needed for test script execution
- Providing all training materials and the "dummy data" needed for training

8 Help Desk Plan

RI WIC will employ a multi-layer help desk solution after the implementation of Crossroads and eWIC:

- State agency staff field initial questions and complaints from vendors, clients and clinics
- MIS Contractor help desk staff answer questions and troubleshoot issues related to the Crossroads application at the clinics and RI WIC, when the issue has been sent to them from state agency staff
- eWIC services provider customer service desk assist vendors and cardholders with issues relating to POS devices and lost, damaged or stolen eWIC cards or other redemption related issues
- Local Agency Super Users answer policy questions from the end users

Rhode Island will contract with the TIC and their eWIC services provider for help desk support during pilot and rollout. Following rollout, Rhode Island will shift to the Crossroads M&E Contractor for MIS help desk support but will maintain the support of the eWIC services provider to extend beyond implementation and into ongoing operations. After pilot and rollout, the TIC staff will be available remotely on an "as-needed" basis to support to help desk staff.

8.1 General Responsibilities

Rhode Island WIC Staff will be responsible for providing primary help desk support to users and will determine if the issue is an MIS issue, an eWIC issue, or is a policy and procedure issue. Each contractor will be required to provide a help desk tracking tool to allow Rhode Island to monitor issue response time and status. As issues or questions occur during implementation, the state agency help desk will be contacted. The state agency help desk will determine if the TIC help desk staff need to be involved. If the issue does require the TIC help desk, they will analyze, monitor and report issues to the Rhode Island project manager, QA contractor and other contractor staff to ensure that system functionality is operating as expected and any bugs/errors are captured and tracked through resolution. In the event a resolution requires a coding modification to the MIS, Rhode Island will be responsible for entering the defect into the appropriate Crossroads consortium defect tracking tool.

8.2 Timely Implementation

As with pilot, any system issues discovered during rollout will be reported and tracked by Rhode Island staff. It will be the responsibility of both the TIC and eWIC services provider to resolve the issues in a timely manner. Rhode Island and project management staff will develop a process to ensure timely bug fixes early in the implementation project. This process will account for severity of the issue, magnitude of the fix, and availability of a workaround to determine the amount of time before a resolution must be in place.

8.3 Maintain Hardware

The MIS Contractor will be responsible for maintaining the entire infrastructure required to host the Crossroads application. The eWIC services provider will be responsible for maintaining the entire

infrastructure necessary to provide eWIC processing and support all stand-beside POS terminals provided to vendors.

9 Schedule of Development Activities, Milestones and Deliverables

This section includes a timeline that outlines key implementation tasks, events and deliverables involved in the project MIS and eWIC efforts.

9.1 Overview

As part of their response to the RFP, bidders for the T&I portion of the project will be required to provide detailed descriptions of all planned activities and timeframes related to these project phases. In addition to detailed narrative about each proposed task and activity, bidder's responses will include a proposed project schedule, including Gantt charts that illustrate project milestones, and dates for contract deliverables. This section outlines key implementation tasks, events and deliverables to be completed by the TIC, including system warranty for a set period of time after rollout is complete.

RI WIC is a member of the NCS, which also includes Connecticut, New Hampshire, New York, Vermont and Massachusetts that previously procured through a competitive process a services provider to provide both SNAP and WIC EBT services. RI WIC will require that the TIC confirm their intent to comply with the proposed schedule, coordinate with fellow contractors' schedules, and propose any necessary modifications to the schedule as part of contract negotiations and execution.

9.2 Project Phases

Exhibit 13: Project Phases illustrates the high-level stages and tasks involved with this project.

Project Planning	• Procurement documentation • Contracting
Implementation Planning	• Project Initiation • Final Work Plan & Schedule • Planning Documents • Configuration Sessions, Interface Design and Gap Analysis • Final System Documents
Development	• System Configuration and Interface Development Initiation • Data Conversion • System Configuration, Technical Testing, and Revisions • Equipment Procurement • Operational Planning, Documentation, Policy and Procedure, Training Materials • Clinic and Vendor Enablement, Site Readiness Checklists • Pilot Retail Management Plan • Help Desk and UAT Training

	• UAT • Retail Certifications • Pilot "Go" / "No Go" Checkpoint
Pilot	• Pilot Operations Initiation • State Operations Training • Pilot Training • Pilot Testing • Pilot Evaluation • Modify and Retest System • Rollout "Go" / "No Go" Checkpoint
Statewide Rollout	• System Rollout Initiation • Equipment Procurement (Statewide) • Statewide Training • Statewide System Rollout Technical Support • System Documentation
Maintenance	• System Services • Initial Six (6) Month Warranty for T&I Contract • Ongoing eWIC Services

Exhibit 13: *Project Phases*

9.2.1   Planning Phase

Planning activities relate to the development and release of procurement documents, evaluation of proposals from potential TICs, and contracting with a qualified TIC. The project is technically already in the planning phase, as the requirements are in the process of being developed. This phase will be complete upon the award of the contract to a TIC. Because RI WIC is joining the NCS, they will not undergo a typical procurement process for an eWIC services provider. Instead, RI WIC will confirm the requirements and pricing presented in the NCS purchasing agreements with Xerox before executing a contract.

9.2.2   Design Phase

Design activities set the foundation for the system transfer, and include the planning deliverables that document how the project will take place. Because the selection of the Crossroads system will also involve joining a User's Group, the governing documents and policies will act as a guide for aspects of the system implementation. Some of Crossroads' processes and procedures are still under development, but there is a precedent that new states cannot request any changes that impact the system source code during implementation of the system or immediately following statewide rollout. Therefore, RI WIC understands that the system will be adopted as is, and the TIC will only support data conversion, system configuration, and interface design and development.

The eWIC system and functionality is much less configurable and follows the WUMEI guidelines. Any configuration or state-specific design possible for the eWIC components will also occur during the design phase but is expected to require much less time and fewer state resources.

9.2.2.1 Project Initiation

The project initiation subtask allows all project contractors to meet with RI WIC stakeholders to set the foundation for the project, and confirm expectations for project deliverables and scope. This will include defining project status reporting requirements and risk management strategies, status and checkpoint calls, and defining team role assignments and responsibilities.

9.2.2.2 Final Project Work Plan and Schedule

Both the eWIC services provider and the TIC will deliver final Project Work Plans (PWPs), including Gantt charts, and a project calendar prepared using software such as Microsoft Project (or similar). The contractors will be asked to review each other's work plan and schedule and ensure each PWP aligns with both implementation efforts. Each PWP will reflect consideration of the joint implementation effort as well as any changes agreed to during the project initiation meeting that deviate from those submitted with the contractor's proposal. The QA contractor will develop a joint schedule from these PWPs for RI WIC to work from. The eWIC and TICs will coordinate with the QA contractor to ensure the joint PWP is maintained and updated throughout the life of the project.

9.2.2.3 Planning Documents: Telecommunications, Testing, Implementation, Conversion, Training, and Security Plans

Both the TIC and eWIC services provider will deliver a series of detailed, written plans that describe specific activities for the system implementation. They will include lists of detailed tasks, including task descriptions, identification of responsibilities, and associated timeframes. The TIC's plans will detail the approach to testing, data conversion, training, security and system implementation, and Pilot. This documentation will also contain recommendations related to the telecommunications needs of RI WIC and the clinic sites.

The eWIC services provider's plans will describe, in detail, the specific activities that will be undertaken for eWIC implementation, including, but not limited to, the approach to implementation, testing, vendor enablement, change management, security, and UAT.

9.2.2.4 DFDD Walkthrough, Configuration Sessions and Gap Analysis

The TIC will perform a walkthrough of the Detailed Functional Design Document (DFDD), which describes the functional requirements of the system. The DFDD will describe all functional specifications, including all inputs, processing and outputs, and will include a cross-reference from screen and report fields to data dictionary entries. During this activity, RI WIC will review the design and functionality of the new system in detail to confirm the configuration settings

and interface functionality. It is anticipated there will be two–three (2-3) design sessions, each spanning approximately one (1) week; however these may be concurrent. Although a preliminary gap analysis was completed as part of the planning project, updates may be required to reflect changes made to the Crossroads software since the original gap analysis was completed.

At least one of these sessions will include the eWIC services provider as functionality of the benefit issuance, redemption and reconciliation processes are reviewed. In addition, the eWIC services provider will perform a walkthrough of their system functionality and state specific decisions; this review is expected to last one (1) week and will include the TIC.

During these sessions, a member of the RI WIC staff will also be reviewing all functionality and configuration decisions to note areas of policy or procedure change within clinics as well as at the state level during financial reconciliation and vendor management activities. During the training and implementation phases of the project, any policy or procedure change will be communicated to clinic staff prior to implementation within their respective clinics.

9.2.2.5 Hosting Plan

Rhode Island will require the TIC to provide a Hosting Plan detailing how the Crossroads system will be hosted. Rhode Island will require that the system be hosted in a secure, sustainable data center. The plan will include information on the configuration of the back-up and recovery system and how the back-up system would be rolled out in the event of a disaster. In the event the TIC is using physical data centers (e.g., not in the cloud) to host the application, the Hosting Plan will be required to identify the back-up datacenter location for disaster recovery.

9.2.3 Development Phase

The TIC and eWIC services provider will convene an onsite meeting to review the plans, schedules, and deliverables for the modification, testing, and implementation phases of the transfer system and eWIC project. Key RI WIC, QA, and eWIC/TIC staff will participate. After the meeting, the QA contractor will deliver a technical memorandum documenting all agreements, understandings, and contingencies arising from the system modification initiation meeting.

9.2.3.1 Data Conversion

RI WIC determined that three (3) years of clinic services and all selected data fields from legacy vendor data will be migrated from RIWEBS to the Crossroads system. RI WIC staff will work with the TIC to determine what data is migrated, and ensure data integrity to the extent possible, prior to conversion. This will entail reviewing data to ensure that all fields have been used uniformly and consistently. The TIC will be responsible for mapping the data from RIWEBS to the Crossroads system, and developing appropriate data conversion methods to migrate the data. Once agreed upon, the TIC will execute data conversion to the extent possible using

automated methods, and RI WIC staff will then cleanse the remaining data. Data conversion will be tested prior to UAT by the TIC and further tested by RI WIC during UAT.

9.2.3.2 Interface Development

During the design phase, the TIC will have determined the requirements to interface with RI WIC MIS external systems, such as statewide children's health database. Using those requirements, the TIC will perform development tasks as necessary to ensure the Crossroads system properly interfaces with other identified programs. These development tasks will not include modifications to the Crossroads code.

Based on the accepted design documents, the eWIC services provider will make any modifications to the existing eWIC system, and, in conjunction with the TIC, interface it with the Crossroads system. As part of service development and implementation, the eWIC services provider will make modifications as necessary to the eWIC system to meet the requirements of RI. The eWIC service contractor will develop the support infrastructure for eWIC including but not limited to communications to the WIC MIS, EBT card design, and ARU/CSR capabilities.

9.2.3.3 System Configuration, Technical Testing and Revisions

As previously noted, because RI WIC is joining a consortium, there is no plan to modify the system during the transfer project, outside of system configuration, data conversion, and supporting connectivity with other state interfaces and the eWIC services provider.

It is anticipated that throughout the project lifecycle, the eWIC services provider's test environments will be required to support multiple users, often concurrently. This may include the TIC validation of eWIC functionality and interface, one or more vendors or third party certifications, and RI UAT testing. The eWIC services provider and vendors in Rhode Island will follow the version of the WIC EBT Operating Rules and Technical Implementation Guidance (TIG) supported by the TIC and eWIC contractor and/or the most current version.

Both contractors will employ a structured system life cycle development methodology that includes the types of test activities described in **Exhibit 14**: *Testing Activities*.

Test Type	Description
Baseline Test	Prior to any system modifications, the system will require a baseline test to ensure that the transferred system operates correctly in RI WIC environment. The system will require a baseline test to ensure that the eWIC system operates correctly in the Crossroads environment.

Test Type	Description
Unit/Module Test	This test is used to validate that an individual program module or script functions correctly. It validates the module's logic and adherence to functional requirements and technical specifications. Each unit/module test will execute every source statement and each conditional branch in the module. Test results are recorded in the Software Development folder for that module.
Subsystem Integration Test	This test examines subsystems that are made up of integrated groupings of software modules. Subsystem integration testing should be conducted in the development environment. It is the first level of testing where problem reports are generated, classified by severity, and the resolution monitored and reported. Subsystem integration testing may need to be run several times for each subsystem, and is only complete when it can be run with zero errors.
System Test	This test is conducted on the entire system once modification and testing of all system modules and subsystems have been completed. It determines whether the system complies with standards and satisfies functional, technical, and operational requirements. The goal of testing is to confirm that both individual system modules and the entire system perform in accordance with the functional requirements and technical specifications. During this test period, system documents and training materials may also be tested for accuracy, validity, completeness, and usability. The software performance, response time, and ability of the system to operate under stressed conditions are tested. Also, the external system interfaces are tested. The ability of the system to correctly process data converted from the legacy WIC is tested. All findings are documented in a System Qualification Test Analysis report prepared by the TIC and eWIC services provider, and submitted to RI WIC. Like the subsystem integration test, this test may need to be run several times and is only complete when it runs with no known errors.
Contractor to Contractor Testing	The TIC and the eWIC services provider will perform an end to end test of system functionality throughout the issuance, redemption, and reconciliation process to ensure the system will be implemented with full functionality from both the MIS and the eWIC systems.
Regression Testing	Regression testing will retest a system component, such as a unit, module, or subsystem, following any modification to verify that the problem was corrected or enhancement made without adverse side effects to existing functionality and to ensure the component still complies with its requirements. Regression testing also

Test Type	Description
	refers to rerunning the entire system test after errors have been corrected to ensure that unanticipated errors have not been introduced elsewhere in the system by the error correction activity.
Readiness Certification	Once both contractors are satisfied that the system meets the functional requirements and technical specifications, the contractors will provide RI WIC with a written certification that the system is ready for UAT. This certification will not be delivered until the system has passed all tests and there are no known errors.

Exhibit 14: *Testing Activities*

9.2.3.4   Equipment Procurement

The TIC will assess if any additional equipment will be required and provide the specifications for this equipment to RI WIC. RI WIC will then procure any additional equipment identified by the TIC as necessary. This assessment will occur early enough in the development phase for RI WIC to procure any additional equipment prior to installation of the system on RI WIC's environment. Because RI WIC is contracting for hosted services, it is anticipated that the only equipment required for the MIS effort will be the procurement of scanner/printer equipment.

For any vendors requiring stand-beside POS devices, the eWIC services provider will execute equipment agreements, ship stand-beside POS devices, and train stores on POS device use. Detailed information about the training plan for vendors requiring stand-beside POS documents is available in Section 7: Training Plan.

9.2.3.5   Operational Planning, Documentation and Training Materials

The TIC and eWIC services provider will deliver all reports and other written deliverables to the RI WIC project manager and QA contractor. This will include all system and user documentation, as well as any updates required to existing project documentation. Other planning tasks and non-written deliverables will be performed under the direction of the RI project manager. Written deliverables will be submitted electronically in draft form for review by RI and QA staff (as appropriate). Final products will be submitted after receipt of RI WIC comments and in appropriate quantities and format for implementation and system operation purposes. Some documents, such as training manuals, may be required in electronic and hard copy formats; such deliverable submission requirements will be detailed in the RFP.

RI WIC will review available training materials or policies from other Crossroads member states to glean lessons learned that may impact state policy updates. Policy updates are the responsibility of RI WIC State staff, with input from the TIC, eWIC and QA contractors.

While the details of the eWIC services provider contract are still vague under the NCS, RI WIC will request the eWIC services provider design, develop, and submit the following materials:

- **Cardholder Training Pamphlet**: Provides information on how to use and properly care for the EBT card. Materials will be provided in English and Spanish.
- **Cardholder Training Automated Response Unit (ARU) script**: Documents complete script, process flows and decision points for calls made to the ARU.
- **Vendor POS User's Manual**: Provides a systematic description of how to perform eWIC transactions on the stand-beside POS device. It also documents how to access reports, and perform daily reconciliation. It includes information related to troubleshooting and problem resolution.
- **Vendor Tips Card**: A quick reference card providing information on common functions performed on the stand-beside POS terminal.
- **eWIC Train-the-Trainer Manual**: A manual that will be used to train Rhode Island Super Users, and subsequently by them to train Local Agency staff.
- **Rhode Island WIC State Agency Staff eWIC Manual**: A manual detailing the functionality of the eWIC system that State Agency users will access external to the Crossroads system. The manual will be broken down by functional area and will include hands-on example of system tasks for each training area.

9.2.3.6 Clinic Enablement

In order to initiate Pilot and Rollout, clinics must be ready to support eWIC. RI WIC will request the eWIC services provider develop a Clinic Enablement Plan, which describes the methods for ensuring WIC clinics are enabled to issue and manage the Rhode Island eWIC card. The plan will describe the activities, schedule and staff proposed for clinic enablement.

The eWIC services provider will provide a list of the technical requirements for operation of the software and hardware in the State Office and Local Agencies. From this list, RI WIC will develop detailed checklists to be completed by each Local Agency (to include all clinic locations) to determine the readiness of each site for implementation of the new system. The checklists will capture data to evaluate relevant aspects of each existing site, such as clinic layout, electrical service, network capabilities, and the ability to keep equipment and card stock secure. In addition, the TIC will review this list and add additional clinic readiness tasks to ensure clinic staff are also prepared for their MIS replacement. The State Office will work with Local Agencies to complete the checklists. RI WIC State staff will review each of the checklists, create a technical memorandum identifying any areas of concern related to the implementation of the system in any site, and create a plan for mitigating the concern.

The eWIC services provider will support testing that ensures transactions originating from the clinic sites are being properly received in the eWIC production environment, and responses are properly received by the clinic user. The eWIC services provider will support testing to ensure that PIN encryption in the production environment is working properly. Additionally, the eWIC

services provider will ensure that the process for card delivery to clinic sites meets all service level requirements.

The TIC will support testing to ensure that clinic operations are fully operational and that clinic staff have been trained on MIS operations. In addition, they will support testing to ensure that information from the clinic sites is properly reported and reconciled at the State Office level. From a clinic readiness perspective, the TIC will assess all equipment needs on behalf of RI WIC and support their procurement efforts as needed. In addition, prior to any site becoming operational, the TIC will perform tests to ensure the system is fully operational in each clinic, contains converted data, and can successfully access interfaced systems. These tests will be tracked by the TIC against a list of clinics expected to rollout. Rollout will not proceed until all clinics have been verified as operational.

All clinic training will be the responsibility of state agency staff although materials will be provided by the TIC.

Following the completion of clinic enablement activities, the eWIC services provider and the TIC will create summaries of the enablement outcomes for final acceptance by Rhode Island.

9.2.3.7   Vendor Enablement

The eWIC services provider will support the vendors in their POS development efforts by participating in interface discussions (this is typically done separately with each vendor and their Third Party Processors (TPP)) and providing technical assistance while the vendors are developing and testing their systems. In supporting integration efforts, the eWIC services provider will develop an Integrated Vendor Interface Specification Document that addresses eWIC message and file sets being used for Rhode Island. This document will be made available to any vendor or TPP interested in integrating eWIC into their systems. The eWIC services provider will participate in conference calls and meetings with individual vendors or vendor groups as needed.

The Vendor Enablement and Certification Plan must address the following at a minimum:

- The eWIC services provider's approach to vendor integration promotion activities
- The eWIC services provider's approach to facilitating the vendor and acquirer/TPP agreements
- Processes and standards the eWIC services provider will use to certify integrated vendors
- Processes and standards the eWIC services provider will use to certify Acquirers/TPPs
- Type of POS equipment to be deployed by the eWIC services provider, if required
- Plans for onsite deployment and equipment testing by the eWIC services provider
- Description of support services/customer service to be provided to all vendors by the eWIC services provider

In addition to the activities detailed in the Vendor Enablement Plan, RI WIC will be requesting written confirmation from all authorized vendors that they have received training on eWIC prior to Pilot.

9.2.3.8 Pilot Vendor Management Plan

The Vendor Management Plan will kick-off during the development phase, in advance of Pilot, with a meeting with the Rhode Island Food Dealers Association (RIFDA). The RIDFA has been a supporter of RI WIC's efforts to convert to eWIC throughout the planning process. This will be the first meeting with RIFDA concerning this project in which the eWIC services provider will have participated. Information gleaned from this meeting will be provided in the Vendor Enablement and Certification Plan.

9.2.3.9 Integrated Vendor Certification

The eWIC services provider will facilitate all certification activities. Included within that responsibility is to provide Integrated Vendor Certification Test Scripts. The scripts will address all functions, technical requirements and business rules defined in the Integrated Vendor Interface Specifications Document, as well as those defined by FNS. The scripts will also define set-up requirements for accounts, benefits, cards and vendors, as well as any special conditions such as time sensitive scenarios.

The eWIC services provider will make a test environment, telecommunications, and support resources to allow testing and certifications for vendors and third parties transitioning to eWIC. Such facilities and capabilities will be required throughout the life of the project. Following the completion of vendor enablement activities, the eWIC services provider will submit a summary of the enablement outcomes for final acceptance by Rhode Island.

9.2.3.10 Help Desk Training Approach and Methodology

The RI WIC Help Desk and System Support staff is responsible for triaging Help Desk calls, and will be responsible for responding to questions and complaints from vendors, participants and clinics. The TIC will facilitate training for Help Desk and System Support staff several weeks prior to UAT in order to ensure that there is ample time to identify any issues prior to testing. An additional, abbreviated refresher training session will be provided on the same topics the week prior to UAT. The eWIC services provider may be present during this training; however they will have worked with the TIC to develop the training materials.

9.2.3.11 UAT: Training and Execution

UAT will encompass full system end-to-end functionality testing. It is assumed that the UAT can be completed in two (2) rounds; the first will test the MIS only, and the second will test the MIS and eWIC systems concurrently. If there are any errors that prevent full functionality testing during the demonstration, UAT will not proceed until the errors are resolved. The TIC is

restricted to providing solutions for only non-code related issues, because the code is maintained by the consortium's M&E contractor. In the event that a major defect is identified that would require changes to the code, RI WIC will be subject to the consortium's process for defect reporting and resolution, and a decision will have to be made about the continuation and acceptance of RI WIC's UAT.

Assuming the key function walk through is completed with no critical errors; the system will become available to RI WIC for UAT. The first round of UAT will uncover any issues/errors with the system, and the second will verify that any errors identified have been fixed, and that no new errors were introduced. This requires that the TIC a not only fix issues identified in round one, but also run the resulting system through their system test, prior to delivering it for the second round of UAT. Throughout UAT, both TIC and eWIC services provider will work together to identify if an issue is the result of the eWIC system or the MIS system. Responsibility for resolving issues will fall within their respective roles.

During UAT, the user materials and online help will also be evaluated. The UAT procedures will instruct the testers to reference the user manuals or online help for directions regarding how to perform the required actions. Any inadequacies in the materials must be corrected by the TIC, in conjunction with the eWIC services provider, prior to final acceptance of those documents by RI WIC, and it is expected that these documents will be updated as needed throughout the implementation process to ensure that the result is documentation with the final, accurate information.

The QA contractor will have primary responsibility for managing UAT training and testing procedures. They will ensure that the TIC and eWIC services provider provide UAT participants with system access and testing tools (e.g., scripts and dummy data) needed to perform the training. The monitoring and evaluation completed by the QA contractor will also be included in the report to FNS that will guide the "go" / "no go" evaluation to proceed to Pilot.

RI WIC will be responsible for securing the locations for all training and UAT events, as well as all of the hardware (e.g., computers, projectors, etc.) needed for training execution.

The TIC will be responsible for the content of the training, including the system overview and description of Crossroads and eWIC functionality. The TIC will provide onsite UAT support and metrics related to the success of UAT. They will provide results regularly throughout the UAT process to the project management team and ESC. The TIC will collect UAT evaluations from all parties involved, so that lessons learned may be applied to future waves of training/rollout. The content of these evaluations will be provided to the QA Contractor for review. The monitoring and evaluation completed by the QA contractor will also be included in the report to FNS that will guide the "go" / "no go" evaluation to proceed to Pilot.

The eWIC services provider will also provide onsite support to this effort by providing transaction and other system data through standard and ad hoc reports as needed.

Detailed information about the training plan is available in <u>Section 7: Training Plan</u>.

9.2.3.12   System Pilot Initiation Memorandum

Upon completion of UAT, the TIC and eWIC services provider must provide formal, written assessments and certifications of system readiness for Pilot Implementation, which will be reviewed and evaluated by the State PM and QA contractor. The certifications must include detailed information on all errors identified during UAT and error resolution (this may be provided by automated reporting capabilities of the error tracking application employed). The certifications must verify that the eWIC services provider/TIC certify error free operation of the system, and stability sufficient to be implemented in Pilot installations. The Pilot Initiation report will also include the actions taken for vendor enablement and local agency readiness in addition to UAT results.The Pilot will proceed only with authorization from FNS.

9.2.4   **Pilot**

The purpose of Pilot is to verify that the eWIC system and WIC MIS work correctly in conditions of actual use. Once the systems have passed UAT and have been formally accepted, a Pilot will be conducted in Newport, RI to address state operations, as well as clinic services. Because of the workload for clinic staff and potential of problems associated with dual issuance of benefits, it is not feasible to run RIWEBS and the transfer system in parallel in the pilot agencies; pilot agencies will have read-only access to RIWEBS once pilot begins. RI WIC Wide Area Network (WAN) will be tested prior to pilot to ensure appropriate access to the Crossroads system from the pilot clinic. During pilot, a subset of the Super Users, in addition to the TIC and QA contractor, will support the Pilot area to ensure that functionality is working, and policies and procedures are addressed, prior to rolling out other groups.

RI WIC Pilot will occur in the city of Newport. The area has one (1) local WIC clinic and six (6) authorized WIC vendors. The clinic is operated by East Bay Community Action Program. It serves a WIC population of approximately 900 clients each month. This is a sufficient caseload to provide a valid pilot population for proving out eWIC and the new WIC MIS in Rhode Island. This Pilot group is semi-isolated with three (3) sides bounded by water. This provides a somewhat controlled environment conducive to containing the majority of participants in one location and minimizing transfers in and out of the clinic. This will reduce the likelihood of participants attempting to use their eWIC cards in non-eWIC stores. In **Exhibit 15**: *Newport Pilot Area*, the clinic is circled in red, and the vendors are plotted in blue.
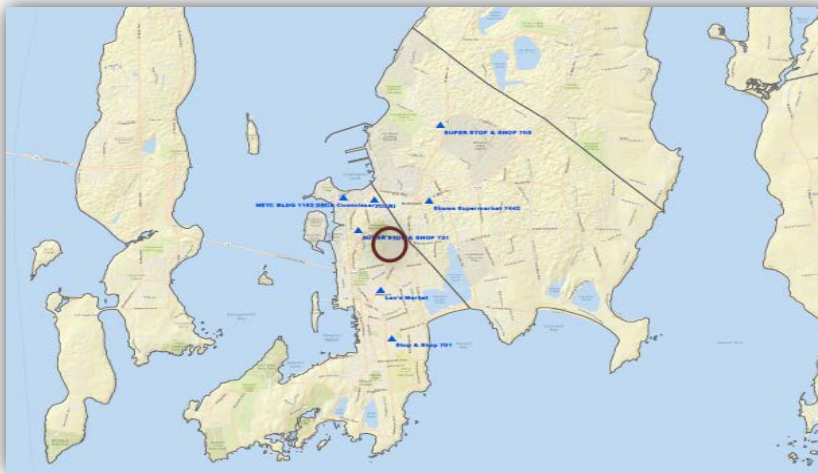
Exhibit 15: *Newport Pilot Area*

The vendors in the Pilot are profiled in **Exhibit 16:** *Pilot Area WIC Authorized Vendors*. Among the six (6) WIC vendors in this area, there is adequate vendor variety and a sufficient number of WIC stores. These include large regional chains (e.g., Stop & Shop, Shaw's), an owner-operated ethnic grocery (Leo's Market) and a military commissary. Participants will have shopping choices during Pilot since they will not be able to use benefits in non-eWIC stores.

Vendor Name	Description	Number of Registers	Annual WIC Sales
Shaw's (#7442)	Full-service regional chain	✓ Checkout lanes: 10 registers ✓ Registers at Customer Service (1) and Self-Service (3)	$78,815
Leo's Market	Owner-operated grocery	✓ Checkout lanes: 2	$24,590

Vendor Name	Description	Number of Registers	Annual WIC Sales
Stop & Shop (#701)	Full-service regional chain	✓ Checkout lanes: 8 ✓ Registers at Customer Service (2) and Floral (1)	$29,520
Stop & Shop (#708)	Full-service regional chain	✓ Checkout lanes: 12 ✓ Registers in the Pharmacy and Floral	$130,998
Stop & Shop (#731)	Full-service regional chain	✓ Checkout lanes: 14	$275,845
DECA	Department of Defense Naval Commissary	✓ Checkout lanes: 7	$7,880

Exhibit 16: *Pilot Area WIC Authorized Vendors*

9.2.4.1 Pilot Operations Initiation

Following successful completion of UAT, the RI WIC project manager will convene a meeting with the ESC, other key RI WIC staff, and contractor staff, as necessary. The meeting attendees will discuss and review the project plan, schedule, and deliverables for the implementation of system pilot projects.

9.2.4.2 Pilot Training

Pre-training video modules will be available for Local Agency staff to review online prior to attending the in-person training, which is anticipated to last five (5) days. Detailed information about the training plan is available in Section 7: Training Plan.

9.2.4.3 Pilot

The TIC will be responsible for day-to-day operation of the central system during the Pilot operations. Both system contractors and QA contractors will be required to oversee the Pilot area during its system rollout. The Pilot is expected to last for three (3) calendar months. TIC and QA contractor staff will be available for onsite support during the first two (2) weeks of pilot. All interfaces, as well as end of day and end of month activities (such as reports) will be tested during Pilot.

9.2.4.4 Evaluate Pilot, Modify, and Retest System

Informal evaluation of the system software, training, help desk, policies and procedures and data conversion will occur through regular communication, such as daily or weekly check-in calls between all contractors and state staff in the pilot area. Corrections, retesting, and release of updates will be the responsibility of the appropriate contractor in the event problems are encountered.

If non-code related software errors are encountered during system pilot, new versions of the system with the errors corrected will be programmed and tested by the TIC. Similar to the UAT efforts, if RI WIC is required to work with the consortium contractor instead of the TIC for all code-related changes, a new process will need to be defined for the progression and acceptance of Pilot. After correction and testing of each new version, the Regression Acceptance Test will be run against that version to check that the error correction has not introduced new errors elsewhere in the system. If there are any outstanding errors at the end of system pilot, a final version that corrects the remaining errors will be produced, and that version will be installed and run for five (5) working days at the Pilot agency before the system is rolled out to the remaining agencies. The purpose of these five (5) additional days is to ensure that no new errors are introduced into the latest version of the system.

At the end of the Pilot, the QA contractor, with input from the pilot agency, will complete and submit a formal evaluation of the system pilot. The evaluation may address the following factors:

- System stability
- Meeting functional requirements
- User satisfaction
- User training
- Impact on participant flow and convenience
- Impact on clinic operations
- Impact on state operations (e.g., vendor management)
- Availability and accuracy of state level data
- Adequacy of help messages and user documentation
- Help desk support
- Security and system integrity
- Need for modification of system or user processes
- Additional lessons learned

The eWIC services provider must also provide a technical memorandum describing the Pilot results, including all identified errors and problems and their solutions. The memorandum must include the eWIC services provider's assessment and verification of the system readiness for rollout.

The results of the evaluations will be documented in a report to be delivered to RI WIC project manager. RI WIC project director must approve all system revisions resulting from the evaluation of the pilot. The QA contractor will be tasked with providing feedback on this process as well.

9.2.4.5 "Go" / "No Go" Checkpoint

After completion of pilot and all subsequent modification and retesting activities, the TIC will facilitate a "go" / "no go" checkpoint discussion with the ESC, eWIC services provider and the QA contractor to assess the readiness of the system for rollout. This discussion will include the results from the evaluation and retesting, as well as an assessment of any remaining risks. The outcome of this meeting will determine whether RI WIC will proceed with statewide rollout.

In addition, FNS must approve Pilot results before RI WIC can proceed with Rollout.

9.2.5 Statewide Rollout

After successful completion of Pilot, the RI WIC ESC will engage with the TIC, Q&A contractor, and eWIC services provider to discuss and review the project plan, schedule, and deliverables for the rollout of the new system to the remaining clinics.

9.2.5.1 Statewide Rollout Trainings

The content of statewide rollout training is similar to that offered in Pilot training. Pre-training video modules will be available for Local Agency staff to review online prior to attending the five (5) day, in-person, comprehensive training that will be facilitated by RI WIC Super Users. During the Pilot period, a total of five (5) training opportunities will be offered to the remaining Local Agency staff (+/- 60 individuals) around the state. These remaining clinics will roll out in three (3) phases.

During the week a group rolls out, Local Agency staff will also close their clinic for Monday-Wednesday, and staff will participate in a 3-day refresher training prior to "go live". Data conversion will occur on these days while the clinics are closed. Detailed information about the training plan is available in Section 7: Training Plan.

9.2.5.2 Statewide System Rollout Technical Support

The TIC will be required to oversee the rollout of the new system. TIC staff will be required to be onsite at the Local Agency during the first two weeks of implementation, as well as one additional week as needed.

The TIC will be responsible for day-to-day operations of the system during the statewide rollout, and the eWIC services provider will provide consultation and assistance as needed. During this period, the TIC will ensure that the central processor application provides all functionality and processing required to fully support RI WIC services.

Following system rollout in the first group of clinics, a checkpoint meeting will be convened to identify any problems that must be fixed before rollout to the remaining clinic sites. The meeting will be attended by the RI WIC ESC, TIC, eWIC services provider, QA contractor, and other RI WIC staff, as deemed necessary. If no significant deficiencies are identified, RI WIC ESC will make

the decision to proceed with rollout to the next group of clinics. This weekly meeting will recur throughout rollout.

Any problems encountered during the initial system operation will be documented, and be handled accordingly, depending on whether the solution can be managed by the eWIC services provider, TIC, or is something that impacts the MIS code, and thus must be vetted by the Crossroads Consortium.

9.2.5.3 System Documentation

The TIC will provide updated technical system documentation, interface source code, forms or other materials that reflects the final implementation details of the system to RI WIC at the conclusion of statewide rollout. The eWIC services provider will provide updated system information and any other materials that reflect the final implementation effort.

9.2.5.4 Post-Implementation Problem Resolution and Checkpoints

Problems encountered during system operation are to be remedied, subject to regression testing, and provided to operational sites as a new system release. If any deficiencies in the system functional requirements, system configuration, interface functionality, technical operation, or reliability are identified, the TIC and eWIC services provider will be required to repair these at no cost to Rhode Island according to the terms of the contract(s).

A meeting will be convened directly following statewide rollout, which includes the eWIC services provider, TIC, QA contractor and State staff to assess the status of the system. The RI WIC ESC will then determine whether the project can proceed to Operation and Maintenance.

The QA contractor must provide a technical memorandum documenting all agreements, understandings and contingencies resulting from the system rollout assessment meeting.

9.2.6 Maintenance Activities

At the time of this IAPD, it remains unclear what the contracting requirements for support and maintenance will be for Crossroads Consortium members. The maintenance activities below have been defined to clearly state the requirements of RI WIC, however as a consortium member, RI WIC may be bound by the contracts in place for the consortium.

During the Operations Phase, the eWIC services provider will maintain ongoing communications with RI WIC, and will provide immediate notification of any system problems. A point of contact will be assigned for ongoing communications to RI WIC related to communication about all eWIC system and operational issues in the future.

9.2.6.1 Contract Closure for the Transfer & Implementation Phase

Subsequent to system rollout, the TIC and eWIC services provider will be required to deliver all documentation, source code (MIS specific), forms, or other materials in addition to client or program data retained under the provisions of this IAPD. These manuals include:

- Detailed Design Document
- Continuation of Business Plan
- System Security Plan
- System Operations/Interface Procedures Manual
- Reports Manual
- Settlement/Reconciliation Manual
- Administrative Terminal Manual
- The Contractor will provide updated manuals to Rhode Island prior to implementing system and operational changes into production

The contractors will submit a final invoice for system modification and implementation activities.

9.2.6.2 Six Month Warranty Period-MIS

For six (6) months after the successful completion of the rollout, and receipt of final documentation and materials, the TIC will be responsible for the support and maintenance of the clinic and state office applications in a hosted environment. The TIC will monitor any system problems identified, and provide any system support, at no additional cost, to ensure the complete functionality as required by this IAPD, the RFP, the contract between RI WIC and the TIC, the DFDD, the DTSD, and the functional requirements. All system problems reported during the warranty period are included under this provision, even if their repair extends beyond the six (6) month warranty period. Repairs include interface defects, document updates, data conversion issues, and configuration defects.

9.2.6.3 Hosting Contract

The RI WIC Program will contract with the TIC to host the RI WIC system for three (3) years with two (2) optional one (1) year extensions. In the event the TIC is not the Crossroads M&E contractor, the TIC will be responsible for coordinating with the M&E contractor for ongoing Crossroads application support and release management activities.

9.2.6.4 System Problem Reporting

During the six (6) month warranty period, the TIC will provide RI WIC with a written response to any reported system problem, addressing the technical nature of the problem, and the proposed plan to resolve the issue. In the event a reported problem is the result of configuration, interface development, or data conversion activities, the TIC will be responsible for addressing those problems in a timely manner. The TIC will be responsible for a monthly

status report containing open and closed issues, monthly status meeting with RI WIC, and other reporting and meeting requirements at Rhode Island's request.

The ongoing communications required from the eWIC services provider include a monthly status report containing open and closed issues, monthly status meeting with RI WIC, and other reporting and meeting requirements at Rhode Island's request. Of particular importance is the advance notification of scheduled system downtime to Rhode Island by the eWIC services provider.

Once in production, the eWIC services provider will manage and provide the following ongoing operations during the contract period:

- Maintenance of interfaces and connectivity between the MIS system, the eWIC System, financial networks, and financial institutions
- Management of eWIC accounts within the system
- Management of account balances with the system and the expungement of expired benefits
- Management of cards and card statuses within the system
- Transaction processing
- Performance of daily settlement and reconciliation
- Provision of required reports and data files
- Provision of customer service support to vendors and cardholders
- Maintenance and support of stand-beside POS devices

9.2.6.5 System Modification

Because RI WIC is joining the Crossroads Consortium, they plan to take the system as is, and will not request system enhancements or code modifications during the six (6) month warranty period of the T&I contract.

9.3 Schedule of Major Milestones and Deliverables

This section illustrates the major milestones and deliverables of the both the MIS system transfer and eWIC implementation, and will designate the primary responsible party, and expected timeframe for each activity.

Project Schedule		
Key Tasks/ Milestones	**Primary Resources (Staff)**	**Timeframe**
Planning Phase		
IAPD Development	Contracted, FNS Approval	
RFP Development/ Evaluation Methodology	State or Contracted, FNS Approval	12 Months
RFP Release	State	

Project Schedule		
Key Tasks/ Milestones	**Primary Resources (Staff)**	**Timeframe**
Vendor Proposals	Bidders	
Contract	State, FNS Approval	
MIS Design Phase[5]		
Project Initiation	State or Contractor	
Final Work Plan	State or Contractor	
Planning Documents	State or Contractor	
Gap Analysis *Decision point: will additional modifications be required through the established change control process?	State and Contractor (if applicable)	3 Months
System Requirements and Design Documents	State or Contractor	
Development Phase		
Business Process Review/ Policy Adjustment	State	
System Configuration, Technical Testing, and Revisions	State or Contractor	
Site Readiness Checklists/Clinic Readiness Activities	State or Contractor	
Equipment Procurement (Pilot)	State, Local Agencies	
Operational Planning, Documentation, and Training Materials	State or Contractor	12 Months
Vendor Enablement	State and Contractor	
Data Conversion[6]	State or Contractor	
Central Operations Preparation	State or Contractor	
User Acceptance Testing *Decision point: proceed to pilot only if UAT performance criteria have been achieved.	State or Contractor	
Pilot Operations Phase		
Training (State Office- IT)	State or Contractor	
Training (Pilot Clinic and State)	State or Contractor	
FNS Checkpoint for Pilot	State and FNS	4 Months
System Pilot Test- 3 Month	State or Contractor	

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[5] The eWIC system is not expected to require much design as the system requires very little configuration.

[6] Data conversion will be tested during the development phase, but will also take place as part of pilot and rollout activities.

Project Schedule		
Key Tasks/ Milestones	**Primary Resources (Staff)**	**Timeframe**
Pilot Evaluation and System Modification/ Retesting *Decision point: proceed to rollout only if pilot performance criteria have been achieved.	State or Contractor	
Equipment Procurement Complete (Statewide)	State, Local Agencies	
Statewide Training	State or Contractor	
Statewide Rollout Phase		
Comprehensive Rollout Training (completed during Pilot)	State and Contractor	
FNS Approval for Rollout	State and FNS	
System Rollout (3 Weeks)	State or Contractor	8 months
System Documentation	State or Contractor	
Statewide Rollout and Participant Conversion	State	
Maintenance Phase		
Initial 6 Month Warranty (MIS)	Contractor (if applicable)	6 months

Exhibit 17: *Proposed Schedule*

For schedule details, a projected MIS/eWIC implementation schedule is embedded here:

RI Joint Schedule v8.mpp
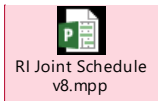
10 Proposed Budget

This section provides the anticipated budget for transfer and implementation of the Crossroads WIC MIS and implementation of eWIC services based upon the NCS purchasing agreement with Xerox. The budget is broken out into five categories of costs as follows:

- State Agency Personnel Costs
- Contractor Costs (broken out between T&I and eWIC costs)
- Estimated Travel Costs
- Equipment/Infrastructure Costs
- Miscellaneous Costs

10.1 Budget Spreadsheets

10.1.1 MIS and eWIC Budget Spreadsheets

The costs below provide the estimated costs based on the assumptions used, information provided by CSC, the Xerox NCS contract, and existing information available regarding recent T&I and eWIC implementation efforts.

WIC MIS & eWIC Implementation	Total
Funding Source	
FNS Funding - WIC MIS	1,888,569
FNS Funding - eWIC	643,007
NSA Funding	1,080,943
Operational Adjustment	0
Total Receipts	**3,612,519**
Outlays / Expenditures	
SA Personnel - WIC MIS	
Rhode Island Project Manager	104,671
Rhode Island Labor	219,038

SA Personnel – eWIC	
Rhode Island Project Manager	68,544
Rhode Island Labor	524,597
SA Personnel Total	**916,850**
Contractor Costs - WIC MIS	
WIC MIS T&I Contractor - Implementation	1,147,792
WIC MIS T&I Contractor - Operations	119,922
WIC MIS QA Contractor	264,000
Contractor Costs - eWIC	
eWIC Service Provider Implementation	282,829
eWIC Service Provider Ongoing	43,230
eWIC QA Contractor	176,000
Contractor Total	**2,033,773**
Travel	
Travel	6,500
Travel Total	**6,500**
Equipment/Infrastructure Costs	
Hosting site hardware & software	0
Clinic WIC MIS Equipment	33,858
Clinic WIC MIS Training Videos	50,000
Clinic eWIC Equipment	47,070

Materials Total	**130,928**
Miscellaneous	
Office Supplies	4,000
Miscellaneous/Other	2,400
Indirect Costs on MIS - rate of 18.50%	281,748
Indirect Costs on eWIC - rate of 18.50%	97,564
Indirect Costs on NSA - rate of 18.50%	138,756
Miscellaneous Total	**524,469**
Total Payments	**3,612,519**

Exhibit 18: *Summary of Estimated Costs*

The funding sources for the T&I and eWIC implementation are shown in the following table.

	Budget Amount:		**$ 3,612,519**
Source of Funds	**Funding Source Share of Cost (%)**	**(Status) Appvd/ Secured**	**Share Amount ($)**
National Technology Grant -WIC MIS implementation	51.3%	Requested	$ 1,888,569
National Technology Grant - eWIC Implementation	17.5%	Requested	$ 643,007
Nutrition Services Administration (NSA) (If Applicable)	31.2%	Requested	$ 1,080,943
Operational Adjustment (OA) (If Applicable)	0%		$ -
Regional Infrastructure Funds (If Applicable)	0%		$ -
State Appropriations (If Applicable)	0%		$ -

Other	0%		$	-
TOTALS	**100%**		**$**	**3,612,519**

Exhibit 19: *Funding Sources*

Out of the total costs of $3,612,519, estimated costs for the MIS transfer and implementation is $2,271,843, while costs for the implementation of eWIC services are estimated at $1,340,676.

10.2 Assumptions

10.2.1 MIS Cost Assumptions:

Contractor costs were estimated based upon industry knowledge, and implementation costs from other MIS transfer projects. It is expected that these costs will change during the procurement of the TIC services. Costs were subject to the following assumptions:

- The T&I project will begin October 2017
- The implementation process of the new WIC MIS will take 14 months, followed by a six (6) month pilot and rollout schedule
- The MIS is being taken as-is, without any customization other than system configuration, interfaces to RI systems, and branding for RI
- RI will execute a three (3) month Pilot, starting in February of 2019
- RI will execute a three (3) week Rollout, starting in June of 2019
- Ongoing operations for the system start December of 2019
- RI will contract for QA support at $20k/month from October 2017 through August of 2019 for the combined WIC MIS/ eWIC project
- The cost estimates assume no change to WIC staff salaries, benefits, or banking costs beyond the inflation factors indicated
- Travel cost are for travel of Local Agency staff to the State Agency to work on the implementation project during the JADS and UAT, and cost for State Agency staff to travel to the Local Agencies during the pilot and rollout phases
- Schedules are estimated and implementation approaches are assumed, based on industry trends, lessons learned from similar initiatives, and additional review of documentation required by RI
- There are no costs estimated for hosting site software and hardware. As Rhode Island is planning to implement the WIC MIS as a Software as a Service (SaaS), the implementation project does not require any hosting site software or hardware. The selected vendor will include the cost of the infrastructure within their monthly hosting charge.

- Clinic computer equipment consists 27 multi-function Office Printer/Scanners to support printing and scanning at an estimated cost of $379.00 each and 105 signature pads at a cost of $225.00 each
- An indirect rate of 18.5% was used for all costs except for equipment purchases and local agency staff costs.

10.2.2 eWIC Cost Assumptions

The following assumptions were used in estimating the eWIC costs:

- eWIC project funding covers WIC staff (program director, project manager, MIS manager, vendor manager and client services manager) to participate in system design, documentation review, and testing
- A QA contractor will be competitively procured for both MIS and eWIC transitions
- The eWIC planning contractor assumed that all eWIC functionality would take place within the MIS system
- Rhode Island is estimated to have 12,500 active households that will be billed monthly for the eWIC Cost per Case Month (CPCM) expense. The pilot will consist of approximately 563 households
- Based upon the existing Xerox contract with NCS, Rhode Island would expect to incur a rate of $.95 CPCM and a start-up cost of $250,000
- Because of the size of the State and unknowns about the pilot, an assumption was made that all vendors requiring stand-beside devices would be equipped during the pilot. An estimated 165 vendors requiring 169 devices would be equipped during the pilot.

10.3 Summary Budget

This section contains a high-level budget summary for both the T&I effort and the eWIC implementation.

10.4 Detailed Budget

The following table provides the MIS and eWIC costs by quarter for the duration of the project by federal fiscal year. The costs are broken down by State costs, TIC, eWIC services provider, Travel, MIS and eWIC Equipment, and miscellaneous.

WIC MIS & eWIC Implementation	2017		2018				2019				Total
	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Total
	Est	Est	Est	Est	Est	Est	Est	Est	Est	Est	Estimate
Funding Source											
FNS Funding - WIC MIS	0	0	165,703	247,764	271,464	272,353	360,297	282,037	259,226	29,724	1,888,569
FNS Funding - eWIC	0	0	38,593	97,843	38,593	97,843	119,551	49,506	122,194	78,883	643,007
NSA Funding	0	76,623	93,692	93,692	93,692	100,950	105,495	127,650	121,843	267,306	1,080,943
Operational Adjustment	0	0	0	0	0	0	0	0	0	0	0
Total Receipts	**0**	**76,623**	**297,988**	**439,300**	**403,750**	**471,146**	**585,343**	**459,193**	**503,263**	**375,913**	**3,612,519**
Outlays / Expenditures											
SA Personnel - WIC MIS											
Rhode Island Project Manager	0	0	13,084	13,084	13,084	13,084	13,084	13,084	13,084	13,084	104,671
Rhode Island Labor	0	40,188	29,400	29,400	29,400	35,525	25,725	17,150	12,250	0	219,038
SA Personnel - eWIC											
Rhode Island Project Manager	0	0	8,568	8,568	8,568	8,568	8,568	8,568	8,568	8,568	68,544
Rhode Island Labor	0	0	48,865	48,865	48,865	48,865	62,500	89,771	89,771	87,094	524,597
SA Personnel Total:	**0**	**40,188**	**99,917**	**99,917**	**99,917**	**106,042**	**109,877**	**128,573**	**123,673**	**108,746**	**916,850**
Contractor Costs - WIC MIS											
WIC MIS T&I Contractor - Implementation	-	-	90,000	160,000	180,000	180,000	181,948	187,922	167,922	-	1,147,792
WIC MIS T&I Contractor - Operations	-	-	-	-	-	-	-	-	-	119,922	119,922
WIC MIS QA Contractor	-	-	36,000	36,000	36,000	36,000	36,000	36,000	36,000	12,000	264,000
Contractor Costs - eWIC											
eWIC Service Provider Implementation	-	-	-	50,000	-	50,000	53,070	9,210	70,550	50,000	282,829
eWIC Service Provider Ongoing	-	-	-	-	-	-	-	-	-	43,230	43,230
eWIC QA Contractor	-	-	24,000	24,000	24,000	24,000	24,000	24,000	24,000	8,000	176,000

	2017		2018				2019				
WIC MIS & eWIC Implementation	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Qtr 1	Qtr 2	Qtr 3	Qtr 4	Total
Contractor Total:	0	0	150,000	270,000	240,000	290,000	295,018	257,132	298,472	233,152	2,033,773
Travel											-
Travel			750	0	0	750	2,250	1,000	1,750	0	6,500
Travel Total:	0	0	750	0	0	750	2,250	1,000	1,750	0	6,500
Equipment/Infrastructure Costs											
Hosting site hardware & software											0
Clinic WIC MIS Equipment	0	0	0	0	0	0	33,858	0	0	0	33,858
Clinic WIC MIS Training Videos	0	0	0	0	0	0	50,000	0	0	0	50,000
Clinic eWIC Equipment	0	29,000	0	0	0	0	18,070	0	0	0	47,070
Materials Total	0	29,000	0	0	0	0	101,928	0	0	0	130,928
Miscellaneous											
Office Supplies	0	0	500	500	500	500	500	500	500	500	4,000
Miscellaneous/Other	0	0	300	300	300	300	300	300	300	300	2,400
Indirect Costs on MIS - rate of 18.50%	0	0	25,869	38,681	42,381	42,519	43,157	44,031	40,470	4,641	281,748
Indirect Costs on eWIC - rate of 18.50%	0	0	6,025	15,275	6,025	15,275	15,843	7,729	19,077	12,315	97,564
Indirect Costs on NSA - rate of 18.50%	0	7,435	14,627	14,627	14,627	15,760	16,470	19,928	19,022	16,260	138,756
Miscellaneous Total	0	7,435	47,321	69,383	63,833	74,355	76,270	72,488	79,369	34,016	524,469
		-									-
Total Payments	0	76,623	297,988	439,300	403,750	471,146	585,343	459,193	503,263	375,913	3,612,519

Exhibit 20: *Detailed Budget*

10.5 Estimated MIS Contractor Implementation Costs

The table below provides a summary of the estimated TIC costs for the WIC MIS implementation of the Crossroads WIC MIS.

T&I Vendor – Crossroads WIC MIS		
Project Management	$	315,000
Documentation	$	120,000
Data Conversion	$	120,000
System Configuration	$	285,000
UAT & Training	$	100,000
Pilot Operations - Hosting	$	160,000
Pilot Operations - Help Desk	$	47,792
Total Implementation Costs	$	1,147,792

Exhibit 21: *WIC MIS Contractor Costs*

10.6 Estimated eWIC Services Provider Implementation Costs

Since Rhode Island will be implementing eWIC services based upon the contract negotiated with Xerox by the NCS, the cost of implementation is set at $250,000. The cost spreadsheet assumes that payment of the $250,000 will be made to Xerox based upon completion of deliverables as follows:

- 20% - $50,000 - Completion of design documents
- 20% - $50,000 - Readiness for UAT (completion of system configuration)
- 20% - $50,000 - Completion of UAT
- 20% - $50,000 – Completion of Pilot
- 20% - $50,000 - Completion of Rollout

In addition, CPCM and stand-beside POS terminals costs are estimated to be $32,829 for the pilot and rollout periods, and are also included in the eWIC Services Provider implementation costs.

10.7 Estimated QA Contractor Costs

Rhode Island will be obtaining the services of a QA vendor for the joint implementation of the WIC MIS and eWIC. Costs have been estimated at $20,000 per month for QA services, and have been split at a 60/40 ratio. The WIC MIS project will absorb 60% of the cost, or $12,000/month while the eWIC project will absorb 40% or $8,000/month of the cost. The length of services needed for QA is estimated at 20 months, providing a total cost of $400,000.

10.8 State Personnel MIS Costs

The estimated state personnel cost for the WIC T&I effort, not including the $47,623 of carry forward staff expenses approved by FNS, is shown in the following table.

WIC MIS IMPLEMENTATION LABOR HOURS			
Project Oversight			
	Hours	**Rate**	**Total**
Project Management	2016	$ 51.92/hour	**$104,671**
RI WIC Staff Support			
	Hours	**Rate**	**Total**
Project Oversight	368	$ 51/hour	**$ 18,743**
System Configuration – 1 FTE	1,680	$ 35/hour	**$ 58,800**
Policy and Procedures – 1 FTE	1,680	$ 35/hour	**$ 58,800**
Training Development – 0.5 FTE	280	$ 35/hour	**$ 9,800**
UAT Test Support - 5 FTE @ 50%	700	$ 35/hour	**$ 24,500**
Pilot support - 3 FTE @ 50%	420	$ 35/hour	**$ 14,700**
Rollout support - 5 FTE @ 50%	350	$ 35/hour	**$ 12,250**
Total Hours	7,494	-	-
Total Cost	-	-	**$ 283,521**

Exhibit 22: *WIC MIS Labor Costs*

10.9 State Personnel eWIC Costs

This section is a table summary of the estimated state personnel costs for eWIC implementation.

RI WIC Staff Support	Rate	Hours	
Project Management	51.92	1,176	68,544
Project Oversight	51.00	368	18,743
.25 FTE for Client Services Manager	59.31	840	49,820
.25 FTE for Client Services Clerical	35.71	840	29,996
.5 FTE for Vendor Manager	76.37	2,380	181,760
.5 FTE for Vendor Field Rep	55.97	2,380	133,209
.25 FTE for Vendor Unit Support	51.43	1,690	86,917

.1 FTE for Financial Services Manager	71.88	336	24,152
Total Hours		8,190	
Total Costs			$ 593,141

Exhibit 23: *State Personnel Costs*

10.10 Estimated MIS Infrastructure Costs

Because the MIS application will be hosted by the TIC, infrastructure costs are limited to the equipment required for the local agencies. The following table provides a summary of the equipment that will be purchased for the local agencies for the T&I project.

Item	Number Requested	Cost/Unit	Estimated Cost
HP Multi-function Office Printers to support printing and scanning	27	$ 379	$ 10,233
Signature Pads / Handheld Wireless Signature Pads	105	$ 225	$ 23,625
Total			$ 33,858

Exhibit 24: *MIS Infrastructure Costs*

10.11 Estimated MIS Clinic Training Videos Costs

Developing web-based training videos that can be viewed at any time by local agency staff is estimated at a one-time cost of $50,000.

10.12 Estimated eWIC Infrastructure Costs

Because the State is purchasing eWIC services from the eWIC services provider, infrastructure costs are limited to the eWIC equipment required in the local agencies. The following table shows the equipment that will be purchased for the local agencies.

Item	Number Requested	Cost/Unit	Estimated Cost
Magnetic Card Readers	130	$ 40	$ 5,200
PIN Selection Devices	78	$ 165	$ 12,870
Total Costs			$18,070

Exhibit 25: *eWIC Infrastructure Costs*

10.13 Travel Costs

Local travel costs have been included in the budget for Local Agency staff that will be traveling to the State WIC Agency for UAT testing, and for State and Local Agency staff that will be supporting the pilot and

rollout. No overnight stays are anticipated for the project, just reimbursement for mileage. The following table shows the estimated costs for travel by project phase.

Local Travel Costs	Attendees	Cost/Attendee	Total
MIS JADS	5	$ 150	$ 750
MIS UAT	10	$ 300	$ 3,000
MIS Pilot	3	$ 500	$ 1,500
MIS Rollout	5	$ 250	$ 1,250
Total Costs			$ 6,500

Exhibit 26: *Travel Costs*

10.14 Miscellaneous Costs

Miscellaneous costs consists of minor project costs that are expected to be absorbed by the WIC State Agency within their NSA grant and indirect costs which are applied to the respective cost category (e.g., labor costs, contractor costs). Minor Project costs include Office Supplies, Miscellaneous Other (such as meeting space), and the indirect cost for State Agency staff labor and contractor costs. The following table shows the estimated costs for miscellaneous costs.

Miscellaneous	
Office Supplies	4,000
Miscellaneous/Other	2,400
Indirect Costs on MIS - rate of 18.50%	281,748
Indirect Costs on eWIC - rate of 18.50%	97,564
Indirect Costs on NSA - rate of 18.50%	138,756
Miscellaneous Total	**524,469**

Exhibit 27: Miscellaneous *Costs*

Also included within the NSA grant as part of the Clinic eWIC Equipment costs is $29,000 of carry forward expenses approved by FNS for the JPMA WIC Shopper App.

> **Commented [MWH2]:** Updated per FNS comments.

11 Cost Allocation Plan

The Crossroads system will be used only for WIC Program services. Therefore, RI WIC expects the entire cost of the SAM system transfer project to be funded through Federal monies received from the FNS WIC Program, and no cost allocation plan is required.

12 Request for Waiver of Depreciation

A waiver of depreciation is requested. The equipment will be procured using grant funding that is outside the WIC operating grant, and consequently it would be inappropriate to burden the NSA grant with the depreciation of this equipment. It is believed that the funding to purchase the equipment will be available within the current year appropriation to allow expensing within the period of acquisition.

13 Test Plan

The Crossroads System will be fully operational in at least five (5) state agencies as of RI WIC Pilot. With every release, all Crossroads member states conduct comprehensive testing of the Crossroads System prior to deploying the release into their production environments. It is expected that the release delivered to RI WIC for implementation will have been thoroughly vetted by the other Crossroads member states. That said, the TIC will be required to test all system components and provide a testing readiness report prior to UAT. During UAT, RI WIC intends to complete end-to-end testing of all Crossroads functionality and system components prior to Pilot. RI WIC will also test all interface functionality as well as converted data to ensure the WIC system, in its entirety, is ready to be deployed. For more information on testing, refer to Section 9.2.3.

For subsequent releases that RI WIC receives as a Crossroads member state, RI WIC will conduct through testing according to policies and processes of the Crossroads User Group.

A comprehensive Test Plan will be produced based upon test plans submitted by the TIC, eWIC, and QA contractors during project initiation. This Test Plan will be submitted to FNS for approval prior to UAT.

Appendix A: Rhode Island Functional Requirements Document (FReD) Evaluation

Functional
Requirements_State E

Appendix B: System Developer Questionnaire

Developer
questionnaire v5 FINA

Appendix C: Feasibility Study and Cost Benefit Analysis

RI Feasibility Study
3.0 APPROVED.docx

Appendix D: Crossroads WIC Project Configuration Plan

Crossroads CONFIG
INSTALL 2014-09.doc

Appendix E: Business Capacity Planning Study

Part A of the BCPS examined the current RIWEBS operations and environment to determine performance standards and technical requirements for a replacement system.

Business Capacity
Planning Study_Part A

Part B of the BCPS reviewed the candidate systems and determined whether they would meet or exceed the baseline reviewed in Part A.

Business_Capacity_Pla
nning_PartB v2 APPRO

Appendix F: TIC Requirements

MIS Requirements –
Final Draft v2.pdf

Appendix G: Budget Worksheets

RI MIS EBT
Implementation Budget
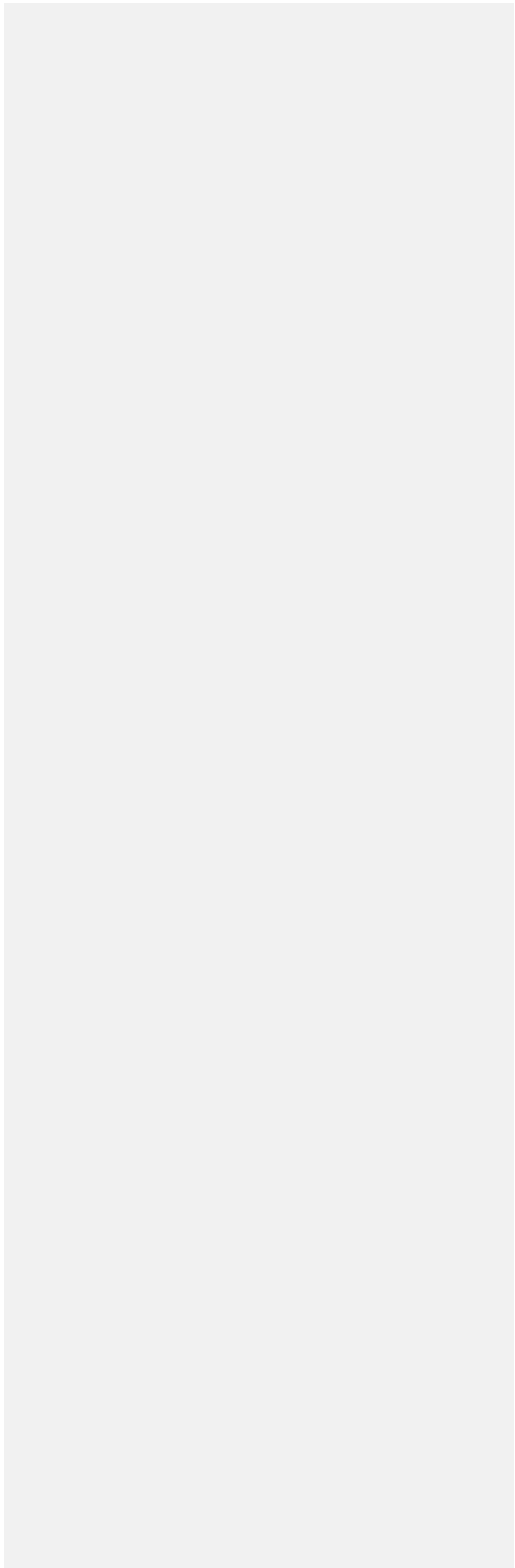
Helpful WIC
Table Groupings

Appointments Tables

Data Information
APPOINTMENT
Parents are MEMBER and AGENCY

Column	Type
APPOINTMENTID(PK)	NUMBER (10) Not Null
AGENCYID	VARCHAR2 (3 Byte) **Not Null**
SERVICESITEID	VARCHAR2 (3 Byte)
APPOINTMENTDATE	DATE
APPOINTMENTTIME	VARCHAR2 (4 Byte) **Not Null**
APPOINTMENTTYPEID	NUMBER (10)
RESOURCEID	NUMBER (10)
STATEWICID	VARCHAR2 (8 Byte)
HOUSEHOLDID	VARCHAR2 (8 Byte)
DURATION	NUMBER (3)
QUEUEDNOTICE	CHAR (1 Byte)
APPOINTMENTKEPT	CHAR (1 Byte)
MISSEDNOTICEPRODUCED	CHAR (1 Byte)
RESOURCECOLUMN	NUMBER (2) **Not Null**
CONFIRMED	VARCHAR2 (1 Byte)
CREATEUSERID	VARCHAR2 (10 Byte)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8 Byte)
MODIFYUSERID	VARCHAR2 (10 Byte)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8 Byte)

Data Information
CLASSENROLLMENT
Parents are CLASSSCHEDULE and MEMBER

Column	Type
ENROLLMENTID(PK)	NUMBER (10) Not Null
CLASSSCHEDULEID	NUMBER (10) **Not Null**
STATEWICID	VARCHAR2 (8 Byte) **Not Null**
HOUSEHOLDID	VARCHAR2 (8 Byte)
QUEUEDNOTICE	CHAR (1 Byte)
ENROLLMENTKEPT	CHAR (1 Byte)
MISSEDNOTICEPRODUCED	CHAR (1 Byte)
CREATEUSERID	VARCHAR2 (10 Byte)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8 Byte)
MODIFYUSERID	VARCHAR2 (10 Byte)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8 Byte)
CONFIRMED	CHAR (1 Byte)

Reference Information
CLASSSCHEDULE
Parents are SERVICESITE and APPOINTMENTRESOURCE

Column	Type
CLASSSCHEDULEID(PK)	NUMBER (10) Not Null
AGENCYID	VARCHAR2 (3 Byte) **Not Null**
SERVICESITEID	VARCHAR2 (3 Byte) **Not Null**
CLASSTYPEID	NUMBER (10) Not Null
CLASSDATE	DATE
CLASSTIME	VARCHAR2 (4 Byte)
DURATION	NUMBER (3)
APPOINTMENTRESOURCEID	NUMBER (10)
LANGUAGE	VARCHAR2 (1 Byte)
SEATAVAILABLE	NUMBER (3)
SEATSFILLED	NUMBER (3)
CREATEUSERID	VARCHAR2 (10 Byte)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8 Byte)
MODIFYUSERID	VARCHAR2 (10 Byte)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8 Byte)
RESOURCECOLUMN	NUMBER (2) **Not Null**

Reference Information
APPOINTMENTRESOURCE
Parent is AGENCY

Column	Type
APPOINTMENTRESOURCEID(PK)	NUMBER (10) Not Null
AGENCYID	VARCHAR2 (3 Byte)
NAME	VARCHAR2 (50 Byte)
RESOURCELEVEL	VARCHAR2 (1 Byte)
APPOINTMENTSVIEWABLE	CHAR (1 Byte)
CREATEUSERID	VARCHAR2 (10 Byte)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8 Byte)
MODIFYUSERID	VARCHAR2 (10 Byte)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8 Byte)
NODELETE	CHAR (1 Byte)

Reference Information
APPOINTMENTTYPE
Parent is AGENCY

Column	Type
APPOINTMENTTYPEID(PK)	NUMBER (10) Not Null
AGENCYID	VARCHAR2 (3 Byte)
DESCRIPTION	VARCHAR2 (50 Byte)
SHORTDESCRIPTION	VARCHAR2 (10 Byte)
CREATEUSERID	VARCHAR2 (10 Byte)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8 Byte)
MODIFYUSERID	VARCHAR2 (10 Byte)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8 Byte)
NODELETE	CHAR (1 Byte)

Reference Information
BUSINESSHOUR
Parent is BUSINESSDAY

Column	Type
AGENCYID	**VARCHAR2 (3)(PK)**
SERVICESITEID	**VARCHAR2 (3)(PK)**
BUSINESSDATE	**DATE (PK)**
STARTTIME	**VARCHAR2 (4)(PK)**
ENDTIME	VARCHAR2 (4)
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8)
MODIFYUSERID	VARCHAR2 (10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8)

Reference Information
CLASSTYPE
Parent is AGENCY

Column	Type
CLASSTYPEID(PK)	NUMBER (10) Not Null
AGENCYID	VARCHAR2 (3 Byte)
TOPIC	VARCHAR2 (50 Byte)
SHORTDESCRIPTION	VARCHAR2 (10 Byte)
CLASSLEVEL	VARCHAR2 (1 Byte)
CREATEUSERID	VARCHAR2 (10 Byte)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8 Byte)
MODIFYUSERID	VARCHAR2 (10 Byte)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8 Byte)
NODELETE	CHAR (1 Byte)

Reference Information
DEFAULTDURATION
Parent is SERVICESITE

Column	Type
AGENCYID	**VARCHAR2 (3)**
SERVICESITEID	**VARCHAR2 (3)**
TYPEID	**NUMBER (10)**
DEFAULTDURATION	NUMBER (3)
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8)
MODIFYUSERID	VARCHAR2 (10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8)

Reference Information
BUSINESSDAY
Parent is SERVICESITE

Column	Type
AGENCYID	**VARCHAR2 (3)(PK)**
SERVICESITEID	**VARCHAR2 (3)(PK)**
BUSINESSDATE	**DATE (PK)**
SATELLITESERVERID	NUMBER (10)
NOTES	VARCHAR2 (4000)
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8)
MODIFYUSERID	VARCHAR2 (10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8)

Reference Information
Holiday
Parent is AGENCY

Column	Type
AGENCYID	**VARCHAR2 (3)(PK)**
HOLIDAYDATE	**DATE (PK)**
DESCRIPTION	VARCHAR2 (50)
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8)
MODIFYUSERID	VARCHAR2 (10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8)
PREFERREDAPPOINTMENTTIME	VARCHAR2 (4)

Reference Information
RESOURCESCHEDULE
Parents are SERVICESITE and APPOINTMENTRESOURCE

Column	Type
AGENCYID	**VARCHAR2 (3)(PK)**
SERVICESITEID	**VARCHAR2 (3)(PK)**
APPOINTMENTRESOURCEID	**NUMBER (10)(PK)**
AVAILABILITYDATE	**DATE (PK)**
STARTTIME	**VARCHAR2 (4)(PK)**
ENDTIME	VARCHAR2 (4)
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8)
MODIFYUSERID	VARCHAR2 (10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8)
AVAILABILITYCOLUMNS	NUMBER (2)

Food Instrument and Member Info Tables
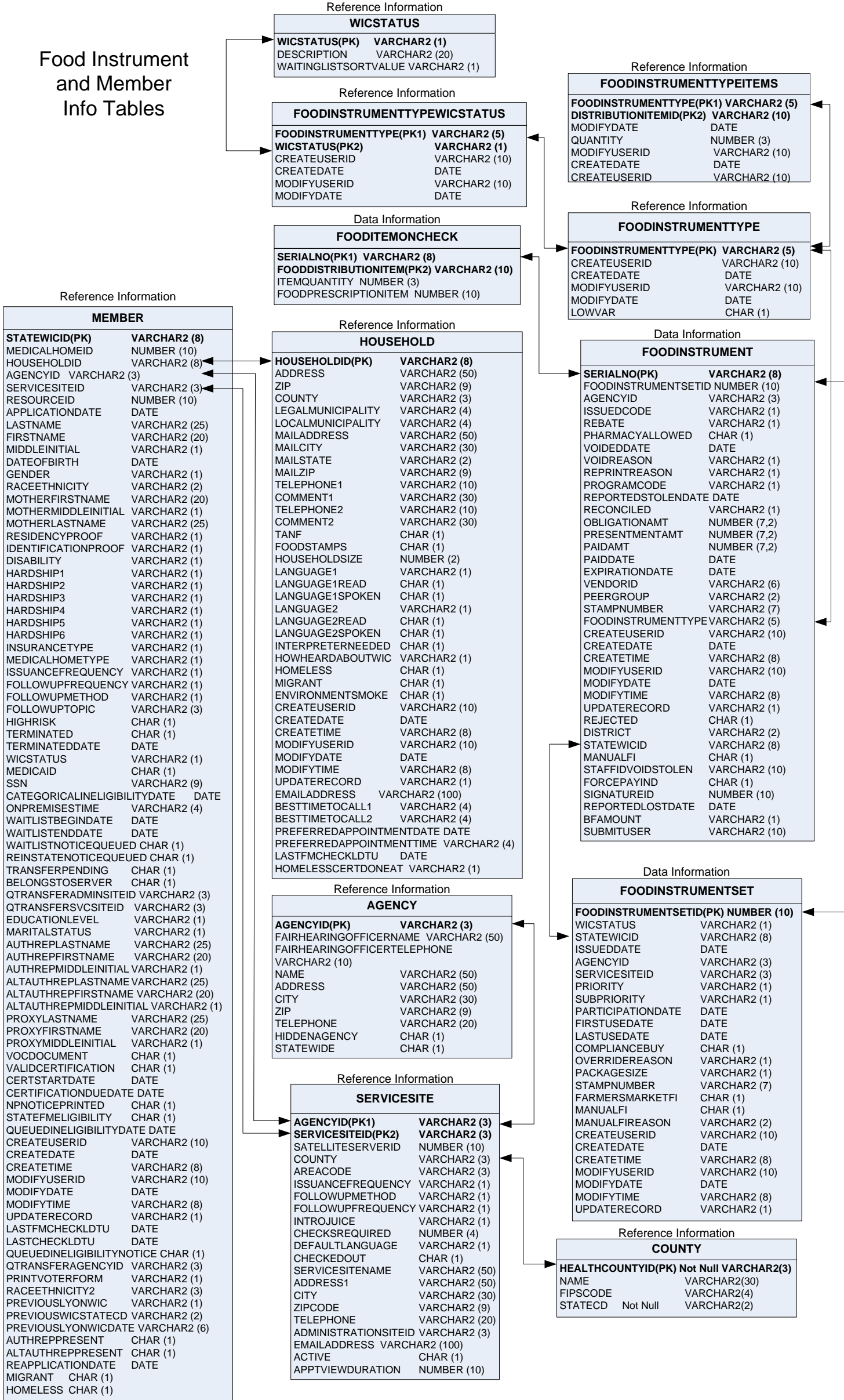
WICSTATUS

WICSTATUS(PK)	**VARCHAR2 (1)**
DESCRIPTION	VARCHAR2 (20)
WAITINGLISTSORTVALUE	VARCHAR2 (1)

Reference Information

FOODINSTRUMENTTYPEWICSTATUS

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WICSTATUS(PK2)	**VARCHAR2 (1)**
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
MODIFYUSERID	VARCHAR2 (10)
MODIFYDATE	DATE

Reference Information

FOODINSTRUMENTTYPEITEMS

FOODINSTRUMENTTYPE(PK1)	**VARCHAR2 (5)**
DISTRIBUTIONITEMID(PK2)	**VARCHAR2 (10)**
MODIFYDATE	DATE
QUANTITY	NUMBER (3)
MODIFYUSERID	VARCHAR2 (10)
CREATEDATE	DATE
CREATEUSERID	VARCHAR2 (10)

Reference Information

FOODINSTRUMENTTYPE

FOODINSTRUMENTTYPE(PK)	**VARCHAR2 (5)**
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
MODIFYUSERID	VARCHAR2 (10)
MODIFYDATE	DATE
LOWVAR	CHAR (1)

Data Information

FOODITEMONCHECK

SERIALNO(PK1)	**VARCHAR2 (8)**
FOODDISTRIBUTIONITEM(PK2)	**VARCHAR2 (10)**
ITEMQUANTITY	NUMBER (3)
FOODPRESCRIPTIONITEM	NUMBER (10)

Reference Information

MEMBER

STATEWICID(PK)	**VARCHAR2 (8)**
MEDICALHOMEID	NUMBER (10)
HOUSEHOLDID	VARCHAR2 (8)
AGENCYID	VARCHAR2 (3)
SERVICESITEID	VARCHAR2 (3)
RESOURCEID	NUMBER (10)
APPLICATIONDATE	DATE
LASTNAME	VARCHAR2 (25)
FIRSTNAME	VARCHAR2 (20)
MIDDLEINITIAL	VARCHAR2 (1)
DATEOFBIRTH	DATE
GENDER	VARCHAR2 (1)
RACEETHNICITY	VARCHAR2 (2)
MOTHERFIRSTNAME	VARCHAR2 (20)
MOTHERMIDDLEINITIAL	VARCHAR2 (1)
MOTHERLASTNAME	VARCHAR2 (25)
RESIDENCYPROOF	VARCHAR2 (1)
IDENTIFICATIONPROOF	VARCHAR2 (1)
DISABILITY	VARCHAR2 (1)
HARDSHIP1	VARCHAR2 (1)
HARDSHIP2	VARCHAR2 (1)
HARDSHIP3	VARCHAR2 (1)
HARDSHIP4	VARCHAR2 (1)
HARDSHIP5	VARCHAR2 (1)
HARDSHIP6	VARCHAR2 (1)
INSURANCETYPE	VARCHAR2 (1)
MEDICALHOMETYPE	VARCHAR2 (1)
ISSUANCEFREQUENCY	VARCHAR2 (1)
FOLLOWUPFREQUENCY	VARCHAR2 (1)
FOLLOWUPMETHOD	VARCHAR2 (1)
FOLLOWUPTOPIC	VARCHAR2 (3)
HIGHRISK	CHAR (1)
TERMINATED	CHAR (1)
TERMINATEDDATE	DATE
WICSTATUS	VARCHAR2 (1)
MEDICAID	CHAR (1)
SSN	VARCHAR2 (9)
CATEGORICALINELIGIBILITYDATE	DATE
ONPREMISESTIME	VARCHAR2 (4)
WAITLISTBEGINDATE	DATE
WAITLISTENDDATE	DATE
WAITLISTNOTICEQUEUED	CHAR (1)
REINSTATENOTICEQUEUED	CHAR (1)
TRANSFERPENDING	CHAR (1)
BELONGSTOSERVER	CHAR (1)
QTRANSFERADMINSITEID	VARCHAR2 (3)
QTRANSFERSVCSITEID	VARCHAR2 (3)
EDUCATIONLEVEL	VARCHAR2 (1)
MARITALSTATUS	VARCHAR2 (1)
AUTHREPLASTNAME	VARCHAR2 (25)
AUTHREPFIRSTNAME	VARCHAR2 (20)
AUTHREPMIDDLEINITIAL	VARCHAR2 (1)
ALTAUTHREPLASTNAME	VARCHAR2 (25)
ALTAUTHREPFIRSTNAME	VARCHAR2 (20)
ALTAUTHREPMIDDLEINITIAL	VARCHAR2 (1)
PROXYLASTNAME	VARCHAR2 (25)
PROXYFIRSTNAME	VARCHAR2 (20)
PROXYMIDDLEINITIAL	VARCHAR2 (1)
VOCDOCUMENT	CHAR (1)
VALIDCERTIFICATION	CHAR (1)
CERTSTARTDATE	DATE
CERTIFICATIONDUEDATE	DATE
NPNOTICEPRINTED	CHAR (1)
STATEFMELIGIBILITY	CHAR (1)
QUEUEDINELIGIBILITYDATE	DATE
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8)
MODIFYUSERID	VARCHAR2 (10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8)
UPDATERECORD	VARCHAR2 (1)
LASTFMCHECKLDTU	DATE
LASTCHECKLDTU	DATE
QUEUEDINELIGIBILITYNOTICE	CHAR (1)
QTRANSFERAGENCYID	VARCHAR2 (3)
PRINTVOTERFORM	VARCHAR2 (1)
RACEETHNICITY2	VARCHAR2 (3)
PREVIOUSLYONWIC	VARCHAR2 (1)
PREVIOUSWICSTATECD	VARCHAR2 (2)
PREVIOUSLYONWICDATE	VARCHAR2 (6)
AUTHREPPRESENT	CHAR (1)
ALTAUTHREPPRESENT	CHAR (1)
REAPPLICATIONDATE	DATE
MIGRANT	CHAR (1)
HOMELESS	CHAR (1)

Reference Information

HOUSEHOLD

HOUSEHOLDID(PK)	**VARCHAR2 (8)**
ADDRESS	VARCHAR2 (50)
ZIP	VARCHAR2 (9)
COUNTY	VARCHAR2 (3)
LEGALMUNICIPALITY	VARCHAR2 (4)
LOCALMUNICIPALITY	VARCHAR2 (4)
MAILADDRESS	VARCHAR2 (50)
MAILCITY	VARCHAR2 (30)
MAILSTATE	VARCHAR2 (2)
MAILZIP	VARCHAR2 (9)
TELEPHONE1	VARCHAR2 (10)
COMMENT1	VARCHAR2 (30)
TELEPHONE2	VARCHAR2 (10)
COMMENT2	VARCHAR2 (30)
TANF	CHAR (1)
FOODSTAMPS	CHAR (1)
HOUSEHOLDSIZE	NUMBER (2)
LANGUAGE1	VARCHAR2 (1)
LANGUAGE1READ	CHAR (1)
LANGUAGE1SPOKEN	CHAR (1)
LANGUAGE2	VARCHAR2 (1)
LANGUAGE2READ	CHAR (1)
LANGUAGE2SPOKEN	CHAR (1)
INTERPRETERNEEDED	CHAR (1)
HOWHEARDABOUTWIC	VARCHAR2 (1)
HOMELESS	CHAR (1)
MIGRANT	CHAR (1)
ENVIRONMENTSMOKE	CHAR (1)
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8)
MODIFYUSERID	VARCHAR2 (10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8)
UPDATERECORD	VARCHAR2 (1)
EMAILADDRESS	VARCHAR2 (100)
BESTTIMETOCALL1	VARCHAR2 (4)
BESTTIMETOCALL2	VARCHAR2 (4)
PREFERREDAPPOINTMENTDATE	DATE
PREFERREDAPPOINTMENTTIME	VARCHAR2 (4)
LASTFMCHECKLDTU	DATE
HOMELESSCERTDONEAT	VARCHAR2 (1)

Data Information

FOODINSTRUMENT

SERIALNO(PK)	**VARCHAR2 (8)**
FOODINSTRUMENTSETID	NUMBER (10)
AGENCYID	VARCHAR2 (3)
ISSUEDCODE	VARCHAR2 (1)
REBATE	VARCHAR2 (1)
PHARMACYALLOWED	CHAR (1)
VOIDEDDATE	DATE
VOIDREASON	VARCHAR2 (1)
REPRINTREASON	VARCHAR2 (1)
PROGRAMCODE	VARCHAR2 (1)
REPORTEDSTOLENDATE	DATE
RECONCILED	VARCHAR2 (1)
OBLIGATIONAMT	NUMBER (7,2)
PRESENTMENTAMT	NUMBER (7,2)
PAIDAMT	NUMBER (7,2)
PAIDDATE	DATE
EXPIRATIONDATE	DATE
VENDORID	VARCHAR2 (6)
PEERGROUP	VARCHAR2 (2)
STAMPNUMBER	VARCHAR2 (7)
FOODINSTRUMENTTYPE	VARCHAR2 (5)
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8)
MODIFYUSERID	VARCHAR2 (10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8)
UPDATERECORD	VARCHAR2 (1)
REJECTED	CHAR (1)
DISTRICT	VARCHAR2 (2)
STATEWICID	VARCHAR2 (8)
MANUALFI	CHAR (1)
STAFFIDVOIDSTOLEN	VARCHAR2 (10)
FORCEPAYIND	CHAR (1)
SIGNATUREID	NUMBER (10)
REPORTEDLOSTDATE	DATE
BFAMOUNT	VARCHAR2 (1)
SUBMITUSER	VARCHAR2 (10)

Reference Information

AGENCY

AGENCYID(PK)	**VARCHAR2 (3)**
FAIRHEARINGOFFICERNAME	VARCHAR2 (50)
FAIRHEARINGOFFICERTELEPHONE	VARCHAR2 (10)
NAME	VARCHAR2 (50)
ADDRESS	VARCHAR2 (50)
CITY	VARCHAR2 (30)
ZIP	VARCHAR2 (9)
TELEPHONE	VARCHAR2 (20)
HIDDENAGENCY	CHAR (1)
STATEWIDE	CHAR (1)

Data Information

FOODINSTRUMENTSET

FOODINSTRUMENTSETID(PK)	**NUMBER (10)**
WICSTATUS	VARCHAR2 (1)
STATEWICID	VARCHAR2 (8)
ISSUEDDATE	DATE
AGENCYID	VARCHAR2 (3)
SERVICESITEID	VARCHAR2 (3)
PRIORITY	VARCHAR2 (1)
SUBPRIORITY	VARCHAR2 (1)
PARTICIPATIONDATE	DATE
FIRSTUSEDATE	DATE
LASTUSEDATE	DATE
COMPLIANCEBUY	CHAR (1)
OVERRIDEREASON	VARCHAR2 (1)
PACKAGESIZE	VARCHAR2 (1)
STAMPNUMBER	VARCHAR2 (7)
FARMERSMARKETFI	CHAR (1)
MANUALFI	CHAR (1)
MANUALFIREASON	VARCHAR2 (2)
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8)
MODIFYUSERID	VARCHAR2 (10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8)
UPDATERECORD	VARCHAR2 (1)

Reference Information

SERVICESITE

AGENCYID(PK1)	**VARCHAR2 (3)**
SERVICESITEID(PK2)	**VARCHAR2 (3)**
SATELLITESERVERID	NUMBER (10)
COUNTY	VARCHAR2 (3)
AREACODE	VARCHAR2 (3)
ISSUANCEFREQUENCY	VARCHAR2 (1)
FOLLOWUPMETHOD	VARCHAR2 (1)
FOLLOWUPFREQUENCY	VARCHAR2 (1)
INTROJUICE	VARCHAR2 (1)
CHECKSREQUIRED	NUMBER (4)
DEFAULTLANGUAGE	VARCHAR2 (1)
CHECKEDOUT	CHAR (1)
SERVICESITENAME	VARCHAR2 (50)
ADDRESS1	VARCHAR2 (50)
CITY	VARCHAR2 (30)
ZIPCODE	VARCHAR2 (9)
TELEPHONE	VARCHAR2 (20)
ADMINISTRATIONSITEID	VARCHAR2 (3)
EMAILADDRESS	VARCHAR2 (100)
ACTIVE	CHAR (1)
APPTVIEWDURATION	NUMBER (10)

Reference Information

COUNTY

HEALTHCOUNTYID(PK)	**Not Null**	**VARCHAR2(3)**
NAME		VARCHAR2(30)
FIPSCODE		VARCHAR2(4)
STATECD	Not Null	VARCHAR2(2)

Prescription and Food tables

Base Food Category Codes
A - FORMULA
B - MILK AND CHEESE
C - BEANS AND PEANUT BUTTER
D - EGGS
F - JUICE
G - CEREAL
I - INFANT CEREAL
J - ENHANCED BREASTFEEDING
K - INFANT JUICE
L - FARMERS MARKET
M - EXCLUSIVELY BREASTFEEDING
N - WHOLE GRAINS
O - CANNED FISH
P - BABY FOOD MEATS
Q - BABY FOOD FRUITS AND VEGETABLE
R - FRUITS AND VEGETABLES
S - FULLY BREASTFEEDING
T - SPECIAL MILK AND CHEESE

Reference Information
FOODDISTCATEGORY

BASEFOODCATEGORYID(PK1)	**VARCHAR2 (1)**
DISTRIBUTIONITEMID(PK2)	**VARCHAR2 (10)**
CREATE_USER_ID	VARCHAR2 (10)
CREATE_DATE	DATE
MODIFY_USER_ID	VARCHAR2 (10)
MODIFY_DATE	DATE

Reference Information
FOODDISTRIBUTIONITEM

DISTRIBUTIONITEMID(PK)	**VARCHAR2 (10)**
DESCRIPTION	VARCHAR2 (60)
DESCRIPTION2	VARCHAR2 (60)
FOODPRODUCTID	NUMBER (10)
DESCRIPTION3	VARCHAR2 (60)
DESCRIPTION4	VARCHAR2 (60)

This is a "Override" table for the foodcategoryqty table. If an maximumunits amount for a bfamount (from the foodlistentryitem), and agecategory (from the foodlistentry), and formulapackageid (from the FoodRXItem) isn't in this table, then the next check is for the maximumunits value from the FoodCategoryQty table where the catgoryid and WIC status (from the Foodcategory table), and agecategory (from the foodlistentry), and bfamount (from the foodlistentyitem)

FORMULAPACKAGEQTY

BFAMOUNT(PK1)	**CHAR (1 Byte)**
AGECATEGORY(PK2)	**CHAR (1 Byte)**
FORMULAPACKAGEID(PK3)	**NUMBER (10)**
MAXIMUMUNITS	NUMBER (5,2)

This is a "Override" table for the foodcategory table. If an maximumunits amount for a bfamount (from the foodlistentryitem), and agecategory (from the foodlistentry), and formulapackageid (from the FoodRXItem) isn't in this table, then the maximumunits value from the FoodCategory table is used

FOODCATEGORYQTY

CATEGORYID	NUMBER (10)
WICSTATUS	CHAR (1 Byte)
AGECATEGORY	CHAR (1 Byte)
BFAMOUNT	CHAR (1 Byte)
MAXIMUMUNITS	NUMBER (6,2)

Reference Information
FOODCATEGORY

CATEGORYID(PK)	**NUMBER (10)**
BASEFOODCATEGORYID	VARCHAR2 (1)
DESCRIPTION	VARCHAR2 (30)
WICSTATUS	VARCHAR2 (1)
MAXIMUMUNITS	NUMBER (6,2)

DefaultFoodPackageItem

DEFAULTFOODPACKAGEID(PK)	**NUMBER(10)**
DEFAULTFOODPACKAGEITEMID(PK)	**NUMBER(10)**
PRESCRIPTIONITEMID	NUMBER(10)
QUANTITY	NUMBER(6,2)

DefaultFPItems_RF335

WICSTATUS(PK)	**VARCHAR2(1)**
BFAMOUNT(PK)	**VARCHAR2(1)**
ODDEVENMONTH(PK)	**VARCHAR2(1)**
PRESCRIPTIONITEMID(PK)	**NUMBER(10)**
QUANTITY	NUMBER(6,2)
MILKFORMULATIONFLAG	VARCHAR2(1)
CHEESEFLAG	VARCHAR2(1)

PrescriptionItemTranslation

SOURCEWICSTATUS(PK)	**VARCHAR2 (1)**
SOURCEPRESCRIPTIONITEMID(PK)	**NUMBER (10)**
TARGETWICSTATUS	VARCHAR2 (1)
TARGETPRESCRIPTIONITEMID	NUMBER (10)

Reference Information
ITEMPURCHASESIZE

PURCHASESIZEID(PK)	**NUMBER (10)**
PRESCRIPTIONITEMID	NUMBER (10)
QUANTITY	NUMBER (8,3)
DISTRIBUTIONITEMID	VARCHAR2 (10)
ROUNDUPFACTOR	NUMBER (3,2)
ADDQUANTITYFACTOR	NUMBER (3,2)
LINKAGETYPE	VARCHAR2 (1)
LINKEDDISTRIBUTIONITEMID	NUMBER (10)
CONVERSIONFACTOR	NUMBER (10)

FOODRXEQUNITS

PRESCRIPTIONITEMID	NUMBER (10)
WICSTATUS	CHAR (1 Byte)
AGECATEGORY	CHAR (1 Byte)
BFAMOUNT	CHAR (1 Byte)
EQUIVALENCEUNITS	NUMBER (8,3)

Reference Information
FOODRXITEM

PRESCRIPTIONITEMID(PK)	**NUMBER (10)**
CATEGORYID	NUMBER (10)
PACKAGEID	NUMBER (10)
DESCRIPTION	VARCHAR2 (60)
EQUIVALENCEUNITS	NUMBER (8,4)
DISTRIBUTIONRULE	VARCHAR2 (1)
CHECKNUMBER	VARCHAR2 (10)
MAXQUANTITYONCHECK	NUMBER (6,2)
FORMULATYPE	VARCHAR2 (1)
FORMULAFORMULATION	VARCHAR2 (1)
REBATECONTRACT	VARCHAR2 (1)
PRORATE	VARCHAR2 (1)
MAXIMUMUNITS	NUMBER (6,2)
BASEFOODCATEGORYID	VARCHAR2 (1)
REQUIREACCESSCODE	VARCHAR2 (1)

Reference Information
FOODLISTENTRYITEM

LISTENTRYITEMID(PK1)	**NUMBER (10)**
BFAMOUNT(PK2)	**CHAR (1 Byte)**
LINKEDITEMID	NUMBER (10)
LISTENTRYID	NUMBER (10)
PRESCRIPTIONITEMID	NUMBER (10)
QUANTITY	NUMBER (10)
LINKAGETYPE	VARCHAR2 (1)

Reference Information
FOODLISTENTRY

LISTENTRYID(PK)	**NUMBER (10)**
INTERNALDESCRIPTION	VARCHAR2 (30)
FOODSUBCATEGORYID	NUMBER (10)
WICSTATUS	VARCHAR2 (1)
CATEGORYID	NUMBER (10)
AGECATEGORYID	VARCHAR2 (2)

FOODSUBCATEGORY

FOODSUBCATEGORYID(PK)	**NUMBER (10)**
DESCRIPTION	VARCHAR2 (60)

These tables are not directly related to the prescription tables, but they are a part of the inserts for new food items added to the database

PEERGROUPFOODITEM

PEERGROUPFOODITEMHISTORY

VENDORPRICES

Nota Bene: Prescription table Milk food items will be found in the **MilkFormulationItem** table and all other prescription food items will be found in the **FoodPrescriptionItem** table

This is the "Override" table for the FoodRXItem table. If an equivalenceunits amount for a prescriptionID isn't in this table, then the equivalenceunits value from the FoodRXItem table is used

Rough order of Utility tool updates into the food tables
1. FOODDISTRIBUTIONITEM table
2. PEERGROUPFOODITEM
3. PEERGROUPFOODITEMHISTORY then VENDORPRICES
4. FOODDISTCATEGORY
5. FOODRXITEM
6. ITEMPURCHASESIZE

Food Items (including special milk)
7. FOODLISTENTRY Then FOODLISTENTRYITEM
OR
Milk Cheese/Combo Items
7. MILKFORMULATIONITEM
----
8. PRESCRIPTIONITEMTRANSLATION

Data Information
FOODPRESCRIPTIONITEM

STATEWICID(PK1)	**VARCHAR2 (8 Byte)**
PRESCRIPTIONDATE(PK2)	**DATE**
FOODPRESCRIPTIONITEM(PK3)	**NUMBER (10)**
ITEMQUANTITY	NUMBER (3)
SPECIALRXSTART	DATE
SPECIALRXEND	DATE

Data Information
FOODPRESCRIPTION

STATEWICID(PK1)	**VARCHAR2 (8)**
PRESCRIPTIONDATE(PK2)	**DATE**
MILKPRODUCTSQUANTITY	NUMBER (2)
MILKFORMULATION	NUMBER (5)
CHEESEQUANTITY	NUMBER (1)
ENHBFITEMSADDED	CHAR (1)
WICSTATUS	VARCHAR2 (1)
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
MODIFYUSERID	VARCHAR2 (10)
MODIFYDATE	DATE
UPDATERECORD	VARCHAR2 (1)
CREATETIME	VARCHAR2 (8)
MODIFYTIME	VARCHAR2 (8)
FOODPRESCRIPTIONTYPEID	NUMBER (10)

Reference Information
MILKFORMULATIONITEM

MILKFORMULATIONITEMID(PK1)	**NUMBER (10)**
BFAMOUNT(PK2)	**VARCHAR2 (1)**
AGECATEGORYID(PK3)	**CHAR (1)**
WICSTATUS(PK4)	**VARCHAR2 (1)**
PRESCRIPTIONITEMID	NUMBER (10)
DESCRIPTION	VARCHAR2 (30)
MAXIMUMUNITS	NUMBER (5)
MAXCHEESEQUANTITY	NUMBER (5)
SORTVALUE	INTEGER

Risk factor, Certcontact, and Caseloadcount tables

Reference Information – RF ID has one description, but multiple records because of BF amts, WICStatus, and Age Category.

RiskFactor_Reference

RISKFACTORID Not Null VARCHAR2(3)	
WICSTATUS Not Null VARCHAR2(1)	
AGECATEGORYID Not Null VARCHAR2(1)	
BFAMOUNT	VARCHAR2(1)
PRIORITY VARCHAR2(1)	
HIGHRISK Not Null CHAR(1)	
DESCRIPTION	VARCHAR2(60)
CPAASSIGNED Not Null VARCHAR2(1)	
DEFAULTFOODPACKAGEID NUMBER(10)	
DFPPRIORITY	VARCHAR2(1)
DEFAULTASSESSMENT VARCHAR2(4000)	
DEFAULTPLAN	VARCHAR2(4000)

Data Information – Multiple certs for each State WIC Id

Certcontact table

CERTIFICATIONID(PK) NOT NULL NUMBER(10)	
PREGNANCYID	NUMBER(10)
STATEWICID	NOT NULL VARCHAR2(8)
CERTSTARTDATE	NOT NULL DATE
CERTEFFECTIVEDATE	DATE
CERTENDDATE	DATE
CERTTERMDATE	DATE
CERTTERMREASON VARCHAR2(1)	
VOCDOCUMENT	CHAR(1)
CERTINELIGIBLEDATE	DATE
CERTINELIGIBLEREASON	VARCHAR2(1)
CERTASSIGNEDPRIORITY	VARCHAR2(1)
CERTSERVICESITEID	VARCHAR2(3)
AGENCYID	VARCHAR2(3)
MANUALCERT	CHAR(1)
MANUALCERTREASON	VARCHAR2(2)
CERTWICSTATUS	VARCHAR2(1)
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
CREATETIME	VARCHAR2(8)
MODIFYUSERID	VARCHAR2(10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2(8)
UPDATERECORD	VARCHAR2(1)
CERTASSIGNEDSUBPRIORITY VARCHAR2(1)	
CERTAGENCYID	VARCHAR2(3)
SERVICESITEID	VARCHAR2(3)
MANUALCHECKSISSUED	CHAR(1)
PHYSICALLYPRESENT	VARCHAR2(1)
CDCREPORTEDDT DATE	
INFORELEASESIGNED	VARCHAR2(1)
REAPPLICATIONNOTICEPRODUCED VARCHAR2(1)	
REASONNOTPHYSPRESENT CHAR(1)	
AUTHREPPRESENT CHAR(1)	
ALTAUTHREPPRESENT	CHAR(1)
HOSPCERTDONEAT VARCHAR2(2)	
REFERBFCOUNSELOR	CHAR(1)
HMLSCERTDONEAT VARCHAR2(2)	

Data Information – Multiple risk factors for each certification

RiskFactor

CERTIFICATIONID(PK) NOT NULL NUMBER(10)	
RISKFACTORID(PK)	**NOT NULL VARCHAR2(3)**
SYSTEMASSIGNED	CHAR(1)
HIGHRISK CHAR(1)	
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
CREATETIME	VARCHAR2(8)
MODIFYUSERID	VARCHAR2(10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2(8)
UPDATERECORD	VARCHAR2(1)
VENAAPPLIED	CHAR(1)
MEDICALCONDITION	CHAR(1)

Data Information – Each State WIC ID is unique within participation months by program code (WIC or Farmer's Mrkt).

CaseLoadCount

PARTICIPATION_CYM(PK)	**Not Null NUMBER(6)**
STATEWICID(PK)	**Not Null VARCHAR2(8)**
PROGRAMCODE(PK)	**Not Null CHAR(1)**
AGENCYID	Not Null VARCHAR2(3)
SERVICESITE	Not Null VARCHAR2(3)
WICSTATUS	Not Null CHAR(1)
PRIORITY	Not Null CHAR(1)
SUBPRIORITY	CHAR(1)
COUNT_FI_ISSUED	NUMBER(10)
COUNT_FI_ISSUED_REBATE	NUMBER(10)
COUNT_FI_PRESENTED	NUMBER(10)
COUNT_FI_REDEEMED	NUMBER(10)
COUNT_FI_REDEEMED_REBATE NUMBER(10)	
COUNT_FI_VOIDED	NUMBER(10)
COUNT_FI_UNREDEEMED_NOT_VOIDED NUMBER(10)	
SUM_FI_REDEEMED	NUMBER(12,2)
SUM_FI_REDEEMED_REBATE	NUMBER(12,2)
RPTED_THIS_MONTH	CHAR(1)
RDMD_THIS_MONTH	CHAR(1)
COUNT_FI_REJECTED	NUMBER(10)
PROCESS_NBR	NUMBER(10)
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
MODIFYUSERID	VARCHAR2(10)
MODIFYDATE	DATE
BFAMOUNT	VARCHAR2(1)

Data Table – This is the pregnancy record(s) of each mother which can be tied to the **Certcontact** table using the PregnancyID

Pregnancy

PREGNANCYID(PK)	**Not Null NUMBER(10)**
STATEWICID	Not Null VARCHAR2(8)
PREGRCDDATE	Not Null DATE
LMPSTART	DATE
LASTPREGEND	VARCHAR2(6)
EXPDELIVDATE	DATE
EXPECTMULTIPLEBIRTHS	VARCHAR2(1)
NUMBEROFPREGNANCIES	NUMBER(2)
NUMBERWICPREGNANCIES	NUMBER(2)
NUMBERLIVEBIRTHS	NUMBER(2)
NOPRENATALCARE	CHAR(1)
PRENATALCAREBEGAN	VARCHAR2(6)
PREPREGWEIGHT	NUMBER(3)
FEEDINGMETHODCODE	VARCHAR2(1)
PLANNEDCSECTION	CHAR(1)
EATINGNONFOODITEMS	CHAR(1)
ENVIRONMENTALSMOKE	CHAR(1)
PREPREGCIGSDAY	NUMBER(2)
PREPREGALCDAYSWEEK	NUMBER(1)
PREPREGDRINKSDAY	NUMBER(2)
CURCIGSDAY	NUMBER(2)
CURALCDAYSWEEK	NUMBER(1)
CURDRINKSDAY	NUMBER(2)
LAST3CIGSDAY	NUMBER(2)
LAST3ALCDAYSWEEK	NUMBER(1)
LAST3DRINKSDAY	NUMBER(2)
PPCIGSDAY	NUMBER(2)
PPALCDAYSWEEK	NUMBER(1)
PPDRINKSDAY	NUMBER(2)
SMOKINGCHANGE	VARCHAR2(1)
SMOKINGCHANGEPP	VARCHAR2(1)
NOPRENATALCAREPP	VARCHAR2(1)
PRENATALCAREBEGANPP	VARCHAR2(6)
WEIGHTGAINED	NUMBER(3)
CSECTION	CHAR(1)
ONWICDURINGPREGNANCY	CHAR(1)
ACTDELIVDATE	DATE
WEIGHTATDELIVERY	NUMBER(3)
DISCHARGEDATE	DATE
BIRTHINGFACILITY	VARCHAR2(5)
EDUCATIONLEVEL	VARCHAR2(1)
MARITALSTATUS	VARCHAR2(1)
CONCEPTIONAGE	NUMBER(2)
LOWBIRTHWEIGHT	CHAR(1)
PREMATUREBIRTH	CHAR(1)
NEONATALDEATH	CHAR(1)
INFODATE	DATE
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
CREATETIME	VARCHAR2(8)
MODIFYUSERID	VARCHAR2(10)
MODIFYDATE	DATE
MODIFYTIME	CHAR(10)
UPDATERECORD	VARCHAR2(1)
CDCREPORTEDDT	DATE
HOUSEHOLDSMOKING	VARCHAR2(1)
HOUSEHOLDSMOKINGPP	VARCHAR2(1)
MULTIVITAMINBEFOREPREG	VARCHAR2(1)
MULTIVITAMINDURINGPREG	VARCHAR2(1)
PARITY	NUMBER(2)
PREPREGDRINKSWEEK	NUMBER(2)
CURDRINKSWEEK	NUMBER(2)
LAST3DRINKSWEEK	NUMBER(2)
PPCURDRINKSWEEK	NUMBER(2)
BFPEERCOUNSELREFERDATE	DATE

Data Table – General Information about each woman. Every woman in the WIC program will be in this table

Woman

STATEWICID(PK)	**Not Null VARCHAR2(8)**
LOWBIRTHWEIGHT	CHAR(1)
PREMATUREBIRTH	CHAR(1)
NEONATALDEATH	CHAR(1)
CREATIONUSERID	VARCHAR2(10)
CREATEDATE	DATE
CREATETIME	VARCHAR2(8)
MODIFYUSERID	VARCHAR2(10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2(8)
UPDATERECORD	VARCHAR2(1)

Pregnancy, Child, Infantpregnancy, and Woman tables

Data Table – Contains the infant's information and is tied to the mother by the Pregnancy ID found in the **Certcontact** table. The Breastfeeding amount found in this table is used to determine the MOTHER'S Breastfeeding amount because this is what the mother is actually BF the infant. All infants found in this table will also be in the **Child** table as well.

InfantPregnancy

PREGNANCYID(PK)	**Not Null NUMBER(10)**
INFANTNUMBER(PK)	**Not Null NUMBER(10)**
STATEWICID	VARCHAR2(8)
GENDER	VARCHAR2(1)
STATUSPPVISIT	VARCHAR2(1)
WEIGHTLBS	NUMBER(3)
WEIGHTOUNCES	NUMBER(2)
LENGTHINCHES	NUMBER(2)
LENGTHEIGHTHS	NUMBER(1)
EVERBREASTFED	VARCHAR2(1)
CURRENTLYBREASTFED	CHAR(1)
AMOUNTBREASTFEEDING	VARCHAR2(1)
BREASTFEEDINGEND	DATE
STOPPEDBFREASON	VARCHAR2(1)
AGEINTROFORMULA	VARCHAR2(1)
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
CREATETIME	VARCHAR2(8)
MODIFYUSERID	VARCHAR2(10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2(8)
UPDATERECORD	VARCHAR2(1)
BFVERIFIEDDATE	DATE
SUPPFEEDBEGANDATE	DATE

Data Table – Mother and child are tied together using this table. The BF amount in this table is what is used to determine the BF amount of the infant or child. All infants and children will be found in this table

Child

STATEWICID(PK)	**Not Null VARCHAR2(8)**
MOTHERSTATEWICID	VARCHAR2(8)
EVERBREASTFED	VARCHAR2(1)
CURRENTLYBREASTFED	CHAR(1)
AMOUNTBREASTFEEDING	VARCHAR2(1)
BREASTFEEDINGEND	DATE
STOPPEDBFREASON	VARCHAR2(1)
BFINFORMATIONDATE	DATE
AGEINTROFORMULA	VARCHAR2(1)
MULTIPLEBIRTH	VARCHAR2(1)
WEIGHTPOUNDS	NUMBER(3)
WEIGHTOUNCES	NUMBER(2)
LENGTHINCHES	NUMBER(2)
LENGTHEIGHTHS	NUMBER(1)
PREMATUREBIRTH	CHAR(1)
WEEKSGESTATION	NUMBER(2)
MOTHERDOB	DATE
BIRTHFACILITY	VARCHAR2(5)
IMMUNIZATIONCONSENT	CHAR(1)
REGISTRYID	VARCHAR2(15)
IMMUNIZATIONSTATUS	VARCHAR2(1)
IMMUNIZATIONSTATUSUPDATEDATE	DATE
REFUSEDVACCINATIONREASON	CHAR(1)
FOSTERPARENTS	CHAR(1)
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
MODIFYUSERID	VARCHAR2(10)
MODIFYDATE	DATE
UPDATERECORD	VARCHAR2(1)
CREATETIME	VARCHAR2(8)
MODIFYTIME	VARCHAR2(8)
IMMUNIZATIONSTATUSSOURCE	CHAR(1)
BFVERIFIEDDATE	DATE
BFVERIFIEDUPDATEDATE	DATE
SUPPFEEDBEGANDATE	DATE
TVVIDEOVIEWING	VARCHAR2(1)
HOUSEHOLDSMOKING	VARCHAR2(1)

AnthropContact and Bloodwork
tables

Data Information - Height and weight
information is found in this table for all
participants

Data Information - Blood work
information is found in this table. Infants
less than 9 months old will typically not
have any blood work done

ANTHROPCONTACT	
STATEWICID(PK) Not Null VARCHAR2(8)	
MEASUREMENTDATE(PK) Not Null DATE	
CERTSTARTDATE	DATE
LENGTHINCHES	NUMBER(3)
LENGTHEIGHTHS	NUMBER(1)
RECUMBENT	VARCHAR2(1)
WEIGHTPOUNDS	NUMBER(3)
WEIGHTOUNCES	NUMBER(2)
INCORRECTREASON	VARCHAR2(1)
WICSTATUS	VARCHAR2(1)
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
CREATETIME	VARCHAR2(8)
MODIFYUSERID	VARCHAR2(10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2(8)
UPDATERECORD	VARCHAR2(1)

BLOODWORK	
STATEWICID(PK) Not Null VARCHAR2(8)	
RESULTDATE(PK) Not Null DATE	
CERTSTARTDATE	DATE
HEMATOCRIT	NUMBER(3,1)
HEMOGLOBIN	NUMBER(3,1)
LEAD	NUMBER(3,1)
EP	NUMBER(3)
EXCEPTIONREASON	VARCHAR2(1)
WICSTATUS	VARCHAR2(1)
DELAYEDBLOODWORK	CHAR(1)
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
CREATETIME	VARCHAR2(8)
MODIFYUSERID	VARCHAR2(10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2(8)
UPDATERECORD	VARCHAR2(1)
ACTUALBLOODWORKDATE	DATE

ReferenceDictionary
Tables

Reference Tables – These tables contain most of the descriptions found
throughout the application. It can be a little challenging sometimes to hunt
down what code should be used for which description, but it's generally not
too hard. The Descriptions found in the RefDictionaryCategory are very
helpful. Once you find the correct category in the RefDictionaryCategory
table, you can tie the information to the ReferenceDictionary table using
the category to get the items' descriptions.

REFERENCEDICTIONARY	
CATEGORY(PK) Not Null VARCHAR2(20)	
EXTERNALID(PK) Not Null VARCHAR2(10)	
DESCRIPTION	VARCHAR2(135)
SORTVALUE	VARCHAR2(3)
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
MODIFYUSERID	VARCHAR2(10)
MODIFYDATE	DATE
UPDATERECORD	VARCHAR2(1)

REFDICTIONARYCATEGORY	
CATEGORY(PK) Not Null VARCHAR2(20)	
DESCRIPTION	VARCHAR2(135)
STATEDEFINED	CHAR(1)
VALUETYPE	CHAR(1)
VALUELENGTH	NUMBER(1)

CaseLoadCount tables

Data Table – This is a month end table containing summary participant information. These are participation counts/sums by **statewicid/YYYYMM/Program Code**

CASELOADCOUNT		
PARTICIPATION_CYM(PK) Not Null NUMBER (6)		
STATEWICID(PK)	**Not Null**	**VARCHAR2 (8)**
PROGRAMCODE(PK)	**Not Null**	**CHAR (1)**
AGENCYID	Not Null	VARCHAR2 (3)
SERVICESITE	Not Null	VARCHAR2 (3)
WICSTATUS	Not Null	CHAR (1)
PRIORITY	Not Null	CHAR (1)
SUBPRIORITY		CHAR (1)
COUNT_FI_ISSUED		NUMBER (10)
COUNT_FI_ISSUED_REBATE		NUMBER (10)
COUNT_FI_PRESENTED		NUMBER (10)
COUNT_FI_REDEEMED		NUMBER (10)
COUNT_FI_REDEEMED_REBATE		NUMBER (10)
COUNT_FI_VOIDED		NUMBER (10)
COUNT_FI_UNREDEEMED_NOT_VOIDED		NUMBER (10)
SUM_FI_REDEEMED		NUMBER (12,2)
SUM_FI_REDEEMED_REBATE		NUMBER (12,2)
RPTED_THIS_MONTH		CHAR (1)
RDMD_THIS_MONTH		CHAR (1)
COUNT_FI_REJECTED		NUMBER (10)
PROCESS_NBR		NUMBER (10)
CREATEUSERID		VARCHAR2 (10)
CREATEDATE		DATE
MODIFYUSERID		VARCHAR2 (10)
MODIFYDATE		DATE
BFAMOUNT		VARCHAR2 (1)

Data Table – This is a month-end table containing summary enrollment information. These are enrolled counts/sums by **statewicid/YYYYMM/Program Code**

CASELOADCOUNTENROLLMENT		
PARTICIPATION_CYM(PK) Not Null NUMBER(6)		
STATEWICID(PK)	**Not Null**	**VARCHAR2(8)**
PROGRAMCODE(PK)	**Not Null**	**CHAR(1)**
AGENCYID	Not Null	VARCHAR2(3)
WICSTATUS	Not Null	CHAR(1)
PRIORITY	Not Null	CHAR(1)
SUBPRIORITY		CHAR(1)
CURRENTLYBREASTFEEDING	Not Null	CHAR(1)
COUNTY		VARCHAR2(3)
LEGALMUNICIPALITY		VARCHAR2(4)
RACEETHNICITY		VARCHAR2(3)
MIGRANT		CHAR(1)
ORIG_ENROLLEMENT_DATE		NUMBER(6)
CURRENT_EFFECTIVE_DATE		NUMBER(6)
CURRENT_END_DATE		NUMBER(6)
TERMINATION_DATE		NUMBER(6)
REINSTATEMENTDATE		NUMBER(6)
CATEGORICALLY_INELIGIBLE_DATE		NUMBER(6)
PREVIOUS_END_DATE_CYM		NUMBER(6)
ENROLLED_THIS_MONTH		CHAR(1)
WAIT_LIST_STATUS		VARCHAR2(1)
PROCESS_NBR		NUMBER(10)
CREATEUSERID		VARCHAR2(10)
CREATEDATE		DATE
MODIFYUSERID		VARCHAR2(10)
MODIFYDATE		DATE
SERVICESITE	Not Null	VARCHAR2(3)
FULLYBREASTFED		VARCHAR2(1)

Data Table – This is a month-end table containing summary information for items with potential rebates. These are Rebate Items counts/sums by **statewicid/YYYYMM/Program Code**

CASELOADCOUNTREBATEITEMS		
PARTICIPATION_CYM(PK) Not Null NUMBER(6)		
STATEWICID(PK)	**Not Null**	**VARCHAR2(8)**
PROGRAMCODE(PK)	**Not Null**	**CHAR(1)**
BASEFOODCATEGORYID(PK)	**Not Null**	**VARCHAR2(1)**
PROCESS_NBR		NUMBER(10)
REBATEISSUEDCOUNT		NUMBER(10)
REBATEREDEEMEDCOUNT		NUMBER(10)
CREATEUSERID		VARCHAR2(10)
CREATEDATE		DATE
MODIFYUSERID		VARCHAR2(10)
MODIFYDATE		DATE

Data Table – This is a month-end table containing summary unduplicated participation information for the calendar year. This table is unique by **Calendar Year/StateWICID Jan - Dec**

CASELOADCOUNTUNDUPCALENDAR		
FISCALYEAR(PK)	**Not Null**	**NUMBER(4)**
STATEWICID(PK)	**Not Null**	**VARCHAR2(8)**
ENROLLPART_CYM		NUMBER(6)
ENROLLPARTAGENCYID		VARCHAR2(3)
ENROLLPARTWICSTATUS		VARCHAR2(1)
ENROLLPARTPRIORITY		CHAR(1)
ENROLLPARTSUBPRIORITY		CHAR(1)
REPORTEDPART_CYM		NUMBER(6)
REPORTEDPARTAGENCYID		VARCHAR2(3)
REPORTEDPARTWICSTATUS		VARCHAR2(1)
REPORTEDPARTPRIORITY		CHAR(1)
REPORTEDPARTSUBPRIORITY		CHAR(1)
REPORTEDPARTREBATEIND		CHAR(1)
REDEEMEDPART_CYM		NUMBER(6)
REDEEMEDPARTAGENCYID		VARCHAR2(3)
REDEEMEDPARTWICSTATUS		VARCHAR2(1)
REDEEMEDPARTPRIORITY		CHAR(1)
REDEEMEDPARTSUBPRIORITY		CHAR(1)
REDEEMEDPARTREBATEIND		CHAR(1)
PROCESS_NBR		NUMBER(10)
CREATEUSERID		VARCHAR2(10)
CREATEDATE		DATE
MODIFYUSERID		VARCHAR2(10)
MODIFYDATE		DATE

Data Table – This is a month-end table containing summary unduplicated participation information for the federal fiscal year. This table is unique by **Federal Fiscal Year/StateWICID Oct - Sept**

CASELOADCOUNTUNDUPFEDERAL		
FISCALYEAR(PK)	**Not Null**	**NUMBER(4)**
STATEWICID(PK)	**Not Null**	**VARCHAR2(8)**
ENROLLPART_CYM		NUMBER(6)
ENROLLPARTAGENCYID		VARCHAR2(3)
ENROLLPARTWICSTATUS		VARCHAR2(1)
ENROLLPARTPRIORITY		CHAR(1)
ENROLLPARTSUBPRIORITY		CHAR(1)
REPORTEDPART_CYM		NUMBER(6)
REPORTEDPARTAGENCYID		VARCHAR2(3)
REPORTEDPARTWICSTATUS		VARCHAR2(1)
REPORTEDPARTPRIORITY		CHAR(1)
REPORTEDPARTSUBPRIORITY		CHAR(1)
REPORTEDPARTREBATEIND		CHAR(1)
REDEEMEDPART_CYM		NUMBER(6)
REDEEMEDPARTAGENCYID		VARCHAR2(3)
REDEEMEDPARTWICSTATUS		VARCHAR2(1)
REDEEMEDPARTPRIORITY		CHAR(1)
REDEEMEDPARTSUBPRIORITY		CHAR(1)
REDEEMEDPARTREBATEIND		CHAR(1)
PROCESS_NBR		NUMBER(10)
CREATEUSERID		VARCHAR2(10)
CREATEDATE		DATE
MODIFYUSERID		VARCHAR2(10)
MODIFYDATE		DATE

Data Table – This is a month-end table containing summary unduplicated participation information state fiscal year. This table is unique by **State Fiscal Year/StateWICID July – June**

CASELOADCOUNTUNDUPSTATE		
FISCALYEAR(PK)	**Not Null**	**NUMBER(4)**
STATEWICID(PK)	**Not Null**	**VARCHAR2(8)**
ENROLLPART_CYM		NUMBER(6)
ENROLLPARTAGENCYID		VARCHAR2(3)
ENROLLPARTWICSTATUS		VARCHAR2(1)
ENROLLPARTPRIORITY		CHAR(1)
ENROLLPARTSUBPRIORITY		CHAR(1)
REPORTEDPART_CYM		NUMBER(6)
REPORTEDPARTAGENCYID		VARCHAR2(3)
REPORTEDPARTWICSTATUS		VARCHAR2(1)
REPORTEDPARTPRIORITY		CHAR(1)
REPORTEDPARTSUBPRIORITY		CHAR(1)
REPORTEDPARTREBATEIND		CHAR(1)
REDEEMEDPART_CYM		NUMBER(6)
REDEEMEDPARTAGENCYID		VARCHAR2(3)
REDEEMEDPARTWICSTATUS		VARCHAR2(1)
REDEEMEDPARTPRIORITY		CHAR(1)
REDEEMEDPARTSUBPRIORITY		CHAR(1)
REDEEMEDPARTREBATEIND		CHAR(1)
PROCESS_NBR		NUMBER(10)
CREATEUSERID		VARCHAR2(10)
CREATEDATE		DATE
MODIFYUSERID		VARCHAR2(10)
MODIFYDATE		DATE

Data Table – A summary of enrollment (CaseLoadCountEnrollment), participation (CaseloadCount) and redemption (RedemptionReconciliation) totals at the end of the issuance month (reported month). Once the month has been reported, the values will not be adjusted to reflect additional data received in the 30-day and close-out months. It is unique by **AgencyID/ServiceSite/ReportYear/ReportMonth**

CASELOADPROJECTION		
AGENCYID(PK)	**Not Null**	**VARCHAR2(3)**
SERVICESITE(PK)	**Not Null**	**VARCHAR2(3)**
REPORTYEAR(PK)	**Not Null**	**VARCHAR2(4)**
REPORTMONTH(PK)	**Not Null**	**VARCHAR2(2)**
ENROLLMENTCOUNTISS		NUMBER(10)
RPTDPARTISS		NUMBER(10)
RDMDPART30D		NUMBER(10)
RDMDPARTCO		NUMBER(10)
RDMDFIS30D		NUMBER(12)
RDMDFISCO		NUMBER(12)
AVGRDMDFICOST30D		NUMBER(5,2)
AVGRDMDFICOSTCO		NUMBER(5,2)
AVGRECONFICOSTISS		NUMBER(5,2)
FOODEXPCO		NUMBER(12)
CREATEUSERID		VARCHAR2(10)
CREATEDATE		DATE
MODIFYUSERID		VARCHAR2(10)
MODIFYDATE		DATE

Income Tables

Reference - The additional income amount allowed for each household member above the eighth household member.

INCOMEADDITIONALAMOUNT		
FISCALYEAR(PK)	**Not Null**	**VARCHAR2(4)**
ADDITIONALAMOUNT		NUMBER(8,2)

Reference – The annual amount of income allowed for a household of the given household size

INCOMEELIGIBILITYAMOUNT		
FISCALYEAR(PK)	**Not Null**	**VARCHAR2(4)**
HOUSEHOLDSIZE(PK)	**Not Null**	**NUMBER(3)**
ANNUALAMOUNT		NUMBER(8,2)
100PERCENT		NUMBER(8,2)
125PERCENT		NUMBER(8,2)
175PERCENT		NUMBER(8,2)
185PERCENT		NUMBER(8,2)
250PERCENT		NUMBER(8,2)

Data Table - An income item is a quantity of money received at a specified interval that is reported during an income screening contact

INCOMEITEM		
STATEWICID(PK)	**Not Null**	**VARCHAR2(8)**
SCREENDATE(PK)	**Not Null**	**DATE**
LINEITEMID(PK)	**Not Null**	**NUMBER(10)**
FREQUENCY		VARCHAR2(1)
AMOUNT		NUMBER(7,2)
UPDATERECORD		VARCHAR2(1)
HOURSPERWEEK		NUMBER(3)
DURATION		NUMBER(2)
PROOFOFINCOME		VARCHAR2(1)

Data Table – An income screening contact is an encounter with a member where income information is collected and recorded

INCOMECONTACT		
STATEWICID(PK)	**Not Null**	**VARCHAR2(8)**
SCREENDATE(PK)	**Not Null**	**DATE**
CERTSTARTDATE		DATE
ANNUALAMOUNT		NUMBER(6)
TANF		CHAR(1)
FOODSTAMPS		CHAR(1)
MEDICAD		CHAR(1)
PRESUMPTIVEELIGIBILITYDATE		DATE
HOUSEHOLDSIZE		NUMBER(2)
CREATEUSERID		VARCHAR2(10)
CREATEDATE		DATE
CREATETIME		VARCHAR2(8)
MODIFYUSERID		VARCHAR2(10)
MODIFYDATE		DATE
MODIFYTIME		VARCHAR2(8)
UPDATERECORD		VARCHAR2(1)
ADJUNCTIVEVERIFICATIONTYP		CHAR(1)
ADJUNCTIVEVERIFICATIONNUMBER		VARCHAR2(20)
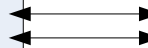
```
SELECT *
  FROM foodprescription fp,
       foodrxitem fri,
       foodprescriptionitem pi,
       itempurchasesize ips,
       fooddistributionitem fdi,
       milkformulationitem mfi,
       rebate_agreement_item_rx rair,
       rebate_agreement_item rai,
       rebate_schedule rs,
       rebate_agreement ra,
       Supplier s,
       BASEFOODCATEGORY BFC
 WHERE 1 = 1
   AND fp.statewicid = '10042769'--Using one WIC ID as an example for this query
   AND pi.foodprescriptionitem = fri.prescriptionitemid
   AND pi.prescriptiondate = fp.prescriptiondate
   AND pi.statewicid = fp.statewicid
   AND ips.prescriptionitemid = fri.prescriptionitemid
   AND fdi.distributionitemid = ips.distributionitemid
   AND mfi.prescriptionitemid(+) = pi.foodprescriptionitem
   AND fdi.distributionitemid = rair.distribution_item_id
   AND rair.agreement_id = rai.agreement_id
   AND rair.supplier_id = rai.supplier_id
   AND rair.schedule_id = rai.schedule_id
   AND rair.product_id = rai.product_id
   AND rai.agreement_id = rs.agreement_id
   AND rai.supplier_id = rs.supplier_id
   AND rai.schedule_id = rs.schedule_id
   AND rs.agreement_id = ra.agreement_id
   AND rs.supplier_id = ra.supplier_id
   AND rs.adj_effective_dt = ra.effective_dt
   AND ra.effective_dt <= pi.prescriptiondate
   AND ra.expiration_dt > pi.prescriptiondate
   AND RA.SUPPLIER_ID = S.SUPPLIER_ID
   AND RA.BASE_FOOD_CATEGORY_ID = BFC.BASEFOODCATEGORYID
```

Using the Distribution_Item_ID in the **REBATE_AGREEMENT_ITEM_RX** table can allow you to derive Rebate items from the food prescription items if needed using the tables found with the FOODDISTRIBUTIONITEM table. Here's an example of what a join between the rebate tables and FoodPrescription tables would look like

--<--Join not found in the **Data Dictionary, but may sometimes be necessary!**

BASEFOODCATEGORY

BASEFOODCATEGORYID(PK) Not Null VARCHAR2 (1)	
DESCRIPTION	VARCHAR2 (30)

SUPPLIER

SUPPLIER_ID(PK) Not Null NUMBER (10)	
SUPPLIER_NAME Not Null VARCHAR2 (50)	
ADDRESS_1	VARCHAR2 (50)
ADDRESS_2	VARCHAR2 (50)
CITY	VARCHAR2 (30)
STATE_CD	VARCHAR2 (2)
ZIP_CD	VARCHAR2 (9)
TELEPHONE_NBR	VARCHAR2 (20)
FAX_NBR	VARCHAR2 (20)
FEDERAL_TAX_ID	VARCHAR2 (9)
STATUS_CD	VARCHAR2 (2)
REMARKS	VARCHAR2 (1000)
CREATE_USER_ID	VARCHAR2 (10)
CREATE_DATE	DATE
MODIFY_USER_ID	VARCHAR2 (10)
MODIFY_DATE	DATE
CONTACT_SALUTATION VARCHAR2 (5)	
CONTACT_FIRST_NAME VARCHAR2 (20)	
CONTACT_LAST_NAME VARCHAR2 (25)	

REBATE_SCHEDULE

AGREEMENT_ID(PK) Not Null NUMBER (10)	
SUPPLIER_ID(PK)	**Not Null NUMBER (10)**
SCHEDULE_ID(PK)	**Not Null NUMBER (10)**
ADJ_EFFECTIVE_DT	Not Null DATE
CREATE_USER_ID	VARCHAR2 (10)
CREATE_DATE	DATE
MODIFY_USER_ID	VARCHAR2 (10)
MODIFY_DATE	DATE

REBATE_AGREEMENT

AGREEMENT_ID(PK) Not Null NUMBER(10)	
SUPPLIER_ID(PK)	**Not Null NUMBER(10)**
BASE_FOOD_CATEGORY_ID Not Null VARCHAR2(1)	
AGREEMENT_TITLE	Not Null VARCHAR2(120)
EFFECTIVE_DT	Not Null DATE
EXPIRATION_DT	Not Null DATE
BILL_TO_ADDRESS_1 VARCHAR2(50)	
BILL_TO_ADDRESS_2 VARCHAR2(50)	
BILL_TO_CITY	VARCHAR2(30)
BILL_TO_STATE	VARCHAR2(2)
BILL_TO_ZIP_CD	VARCHAR2(9)
TELEPHONE_NBR	VARCHAR2(20)
FAX_NBR	VARCHAR2(20)
CONTRACT_BASIS_CD	VARCHAR2(1)
ADJ_METHOD_IND	VARCHAR2(1)
CREATE_USER_ID	VARCHAR2(10)
CREATE_DATE	DATE
MODIFY_USER_ID	VARCHAR2(10)
MODIFY_DATE	DATE
CONTACT_SALUTATION	VARCHAR2 (5)
CONTACT_FIRST_NAME	VARCHAR2 (20)
CONTACT_LAST_NAME	VARCHAR2 (25)

REBATE_AGREEMENT_ITEM

AGREEMENT_ID(PK)	**Not Null**	**NUMBER (10)**
SUPPLIER_ID(PK)	**Not Null**	**NUMBER (10)**
SCHEDULE_ID(PK)	**Not Null**	**NUMBER (10)**
PRODUCT_ID(PK)	**Not Null**	**NUMBER (10)**
REBATE_PER_UNIT	Not Null	NUMBER (9,5)
CREATE_USER_ID		VARCHAR2 (10)
CREATE_DATE		DATE
MODIFY_USER_ID		VARCHAR2 (10)
MODIFY_DATE		DATE

REBATE_AGREEMENT_ITEM_RX

AGREEMENT_ID(PK)	**Not Null NUMBER (10)**	
SUPPLIER_ID(PK)	**Not Null NUMBER (10)**	
SCHEDULE_ID(PK)	**Not Null**	**NUMBER (10)**
PRODUCT_ID(PK)	**Not Null**	**NUMBER (10)**
DISTRIBUTION_ITEM_ID(PK) Not Null VARCHAR2 (10)		
CREATE_USER_ID		VARCHAR2 (10)
CREATE_DATE		DATE
MODIFY_USER_ID		VARCHAR2 (10)
MODIFY_DATE		DATE

MANUFACTURER_PRODUCT

SUPPLIER_ID(PK) Not Null NUMBER (10)	
PRODUCT_ID(PK) Not Null NUMBER (10)	
UOM_CD Not Null VARCHAR2 (3)	
BASE_FOOD_CATEGORY_ID Not Null VARCHAR2 (1)	
PRODUCT_DESC Not Null VARCHAR2 (100)	
UPC VARCHAR2 (30)	
CREATE_USER_ID VARCHAR2 (10)	
CREATE_DATE DATE	
MODIFY_USER_ID VARCHAR2 (10)	
MODIFY_DATE DATE	

NOTE: These tables exist, but ARE NOT USED and have NO date in them:
REBATE_ACCOUNT_TRANSACTION
REBATE_INVOICE
REBATE_INVOICE_ITEM
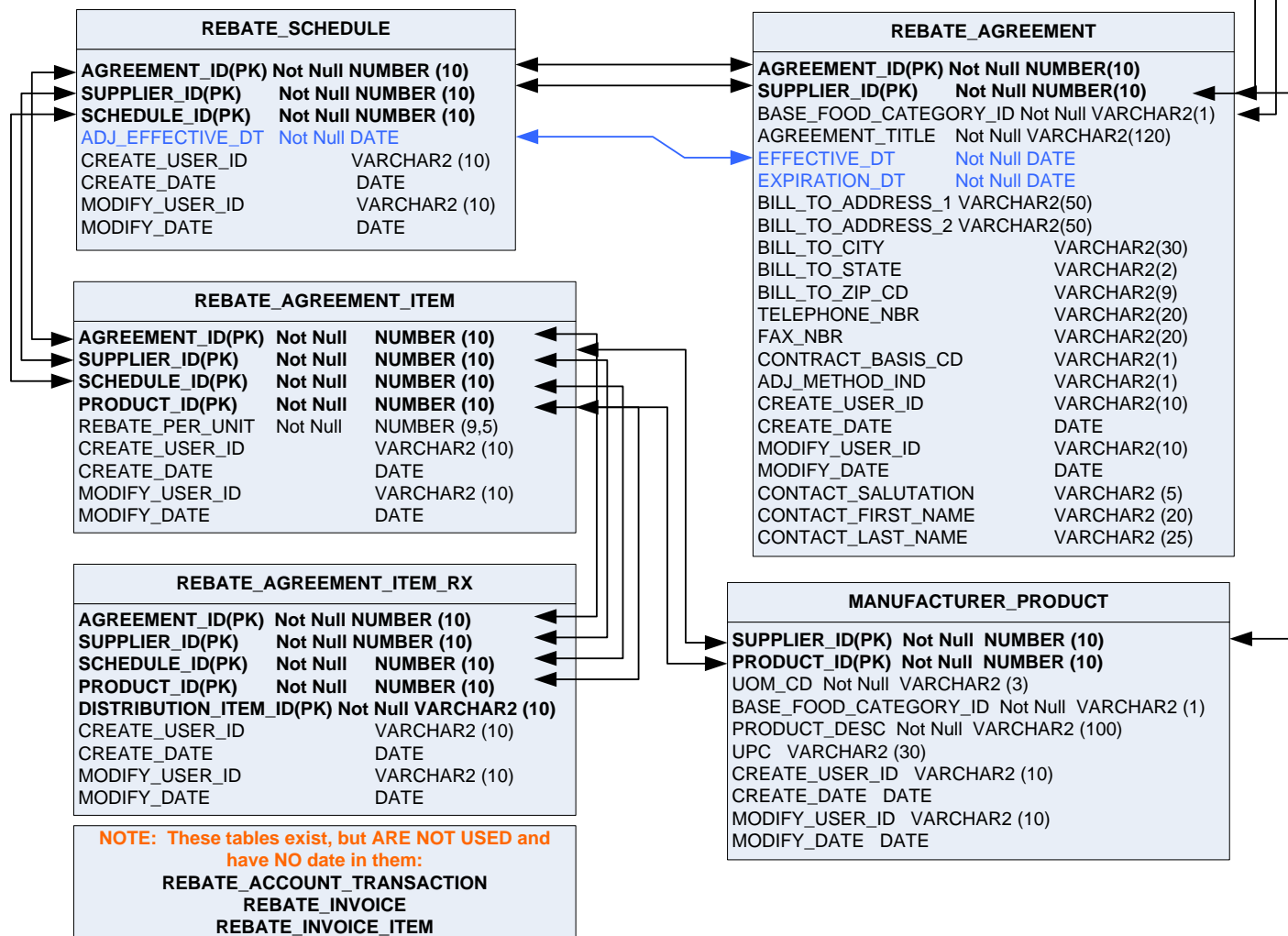
Member data is unique

MEMBER

Column	Type
STATEWICID(PK)	**VARCHAR2 (8)**
MEDICALHOMEID	NUMBER (10)
HOUSEHOLDID	VARCHAR2 (8)
AGENCYID	VARCHAR2 (3)
SERVICESITEID	VARCHAR2 (3)
RESOURCEID	NUMBER (10)
APPLICATIONDATE	DATE
LASTNAME	VARCHAR2 (25)
FIRSTNAME	VARCHAR2 (20)
MIDDLEINITIAL	VARCHAR2 (1)
DATEOFBIRTH	DATE
GENDER	VARCHAR2 (1)
RACEETHNICITY	VARCHAR2 (2)
MOTHERFIRSTNAME	VARCHAR2 (20)
MOTHERMIDDLEINITIAL	VARCHAR2 (1)
MOTHERLASTNAME	VARCHAR2 (25)
RESIDENCYPROOF	VARCHAR2 (1)
IDENTIFICATIONPROOF	VARCHAR2 (1)
DISABILITY	VARCHAR2 (1)
HARDSHIP1	VARCHAR2 (1)
HARDSHIP2	VARCHAR2 (1)
HARDSHIP3	VARCHAR2 (1)
HARDSHIP4	VARCHAR2 (1)
HARDSHIP5	VARCHAR2 (1)
HARDSHIP6	VARCHAR2 (1)
INSURANCETYPE	VARCHAR2 (1)
MEDICALHOMETYPE	VARCHAR2 (1)
ISSUANCEFREQUENCY	VARCHAR2 (1)
FOLLOWUPFREQUENCY	VARCHAR2 (1)
FOLLOWUPMETHOD	VARCHAR2 (1)
FOLLOWUPTOPIC	VARCHAR2 (3)
HIGHRISK	CHAR (1)
TERMINATED	CHAR (1)
TERMINATEDDATE	DATE
WICSTATUS	VARCHAR2 (1)
MEDICAID	CHAR (1)
SSN	VARCHAR2 (9)
CATEGORICALINELIGIBILITYDATE	DATE
ONPREMISESTIME	VARCHAR2 (4)
WAITLISTBEGINDATE	DATE
WAITLISTENDDATE	DATE
WAITLISTNOTICEQUEUED	CHAR (1)
REINSTATENOTICEQUEUED	CHAR (1)
TRANSFERPENDING	CHAR (1)
BELONGSTOSERVER	CHAR (1)
QTRANSFERADMINSITEID	VARCHAR2 (3)
QTRANSFERSVCSITEID	VARCHAR2 (3)
EDUCATIONLEVEL	VARCHAR2 (1)
MARITALSTATUS	VARCHAR2 (1)
AUTHREPLASTNAME	VARCHAR2 (25)
AUTHREPFIRSTNAME	VARCHAR2 (20)
AUTHREPMIDDLEINITIAL	VARCHAR2 (1)
ALTAUTHREPLASTNAME	VARCHAR2 (25)
ALTAUTHREPFIRSTNAME	VARCHAR2 (20)
ALTAUTHREPMIDDLEINITIAL	VARCHAR2 (1)
PROXYLASTNAME	VARCHAR2 (25)
PROXYFIRSTNAME	VARCHAR2 (20)
PROXYMIDDLEINITIAL	VARCHAR2 (1)
VOCDOCUMENT	CHAR (1)
VALIDCERTIFICATION	CHAR (1)
CERTSTARTDATE	DATE
CERTIFICATIONDUEDATE	DATE
NPNOTICEPRINTED	CHAR (1)
STATEFMELIGIBILITY	CHAR (1)
QUEUEDINELIGIBILITYDATE	DATE
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
CREATETIME	VARCHAR2 (8)
MODIFYUSERID	VARCHAR2 (10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2 (8)
UPDATERECORD	VARCHAR2 (1)
LASTFMCHECKLDTU	DATE
LASTCHECKLDTU	DATE
QUEUEDINELIGIBILITYNOTICE	CHAR (1)
QTRANSFERAGENCYID	VARCHAR2 (3)
PRINTVOTERFORM	VARCHAR2 (1)
RACEETHNICITY2	VARCHAR2 (3)
PREVIOUSLYONWIC	VARCHAR2 (1)
PREVIOUSWICSTATECD	VARCHAR2 (2)
PREVIOUSLYONWICDATE	VARCHAR2 (6)
AUTHREPPRESENT	CHAR (1)
ALTAUTHREPPRESENT	CHAR (1)
REAPPLICATIONDATE	DATE
MIGRANT	CHAR (1)
HOMELESS	CHAR (1)

Data Information – Multiple certs for
each State WIC ID in Member Table

One to Many

Certcontact table

Column	Type
CERTIFICATIONID(PK)	**NOT NULL NUMBER(10)**
PREGNANCYID	NUMBER(10)
STATEWICID	NOT NULL VARCHAR2(8)
CERTSTARTDATE	NOT NULL DATE
CERTEFFECTIVEDATE	DATE
CERTENDDATE	DATE
CERTTERMDATE	DATE
CERTTERMREASON	VARCHAR2(1)
VOCDOCUMENT	CHAR(1)
CERTINELIGIBLEDATE	DATE
CERTINELIGIBLEREASON	VARCHAR2(1)
CERTASSIGNEDPRIORITY	VARCHAR2(1)
CERTSERVICESITEID	VARCHAR2(3)
AGENCYID	VARCHAR2(3)
MANUALCERT	CHAR(1)
MANUALCERTREASON	VARCHAR2(2)
CERTWICSTATUS	VARCHAR2(1)
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
CREATETIME	VARCHAR2(8)
MODIFYUSERID	VARCHAR2(10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2(8)
UPDATERECORD	VARCHAR2(1)
CERTASSIGNEDSUBPRIORITY	VARCHAR2(1)
CERTAGENCYID	VARCHAR2(3)
SERVICESITEID	VARCHAR2(3)
MANUALCHECKSISSUED	CHAR(1)
PHYSICALLYPRESENT	VARCHAR2(1)
CDCREPORTEDDT	DATE
INFORELEASESIGNED	VARCHAR2(1)
REAPPLICATIONNOTICEPRODUCED	VARCHAR2(1)
REASONNOTPHYSPRESENT	CHAR(1)
AUTHREPPRESENT	CHAR(1)
ALTAUTHREPPRESENT	CHAR(1)
HOSPCERTDONEAT	VARCHAR2(2)
REFERBFCOUNSELOR	CHAR(1)
HMLSCERTDONEAT	VARCHAR2(2)

Data Information – Multiple risk
factors for each certification

One to Many

RiskFactor

Column	Type
CERTIFICATIONID(PK)	**NOT NULL NUMBER(10)**
RISKFACTORID(PK)	**NOT NULL VARCHAR2(3)**
SYSTEMASSIGNED	CHAR(1)
HIGHRISK	CHAR(1)
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
CREATETIME	VARCHAR2(8)
MODIFYUSERID	VARCHAR2(10)
MODIFYDATE	DATE
MODIFYTIME	VARCHAR2(8)
UPDATERECORD	VARCHAR2(1)
VENAAPPLIED	CHAR(1)
MEDICALCONDITION	CHAR(1)

Reference Information – RF ID has one
description, but multiple records because
of BF amts, WICStatus, and Age Category.

RiskFactor_Reference

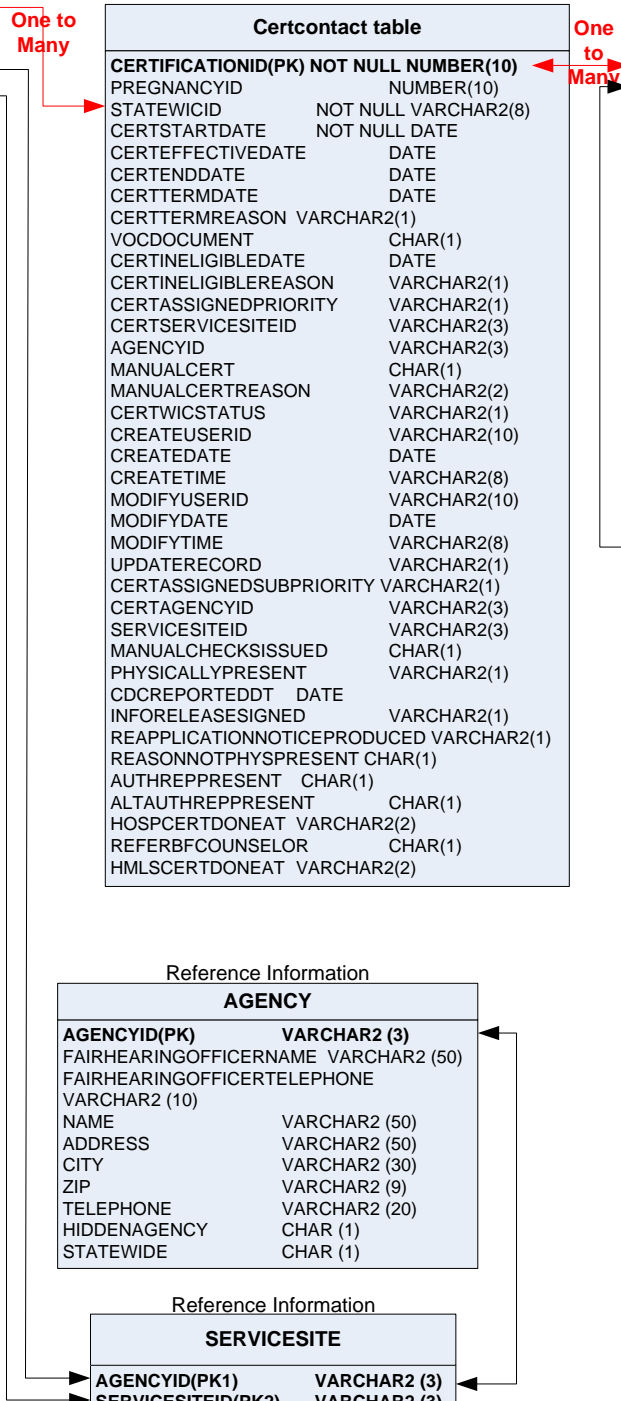| Column	Type
RISKFACTORID(PK)	**Not Null VARCHAR2(3)**
WICSTATUS(PK)	**Not Null VARCHAR2(1)**
AGECATEGORYID(PK)	**Not Null VARCHAR2(1)**
BFAMOUNT(PK)	**Not Null VARCHAR2(1)**
PRIORITY	VARCHAR2(1)
HIGHRISK	Not Null CHAR(1)
DESCRIPTION	VARCHAR2(60)
CPAASSIGNED	Not Null VARCHAR2(1)
DEFAULTFOODPACKAGEID	NUMBER(10)
DFPPRIORITY	VARCHAR2(1)
DEFAULTASSESSMENT	VARCHAR2(4000)
DEFAULTPLAN	VARCHAR2(4000)

Reference Information

AGENCY

Column	Type
AGENCYID(PK)	**VARCHAR2 (3)**
FAIRHEARINGOFFICERNAME	VARCHAR2 (50)
FAIRHEARINGOFFICERTELEPHONE	VARCHAR2 (10)
NAME	VARCHAR2 (50)
ADDRESS	VARCHAR2 (50)
CITY	VARCHAR2 (30)
ZIP	VARCHAR2 (9)
TELEPHONE	VARCHAR2 (20)
HIDDENAGENCY	CHAR (1)
STATEWIDE	CHAR (1)

Reference Information

SERVICESITE

Column	Type
AGENCYID(PK1)	**VARCHAR2 (3)**
SERVICESITEID(PK2)	**VARCHAR2 (3)**
SATELLITESERVERID	NUMBER (10)
COUNTY	VARCHAR2 (3)
AREACODE	VARCHAR2 (3)
ISSUANCEFREQUENCY	VARCHAR2 (1)
FOLLOWUPMETHOD	VARCHAR2 (1)
FOLLOWUPFREQUENCY	VARCHAR2 (1)
INTROJUICE	VARCHAR2 (1)
CHECKSREQUIRED	NUMBER (4)
DEFAULTLANGUAGE	VARCHAR2 (1)
CHECKEDOUT	CHAR (1)
SERVICESITENAME	VARCHAR2 (50)
ADDRESS1	VARCHAR2 (50)
CITY	VARCHAR2 (30)
ZIPCODE	VARCHAR2 (9)
TELEPHONE	VARCHAR2 (20)
ADMINISTRATIONSITEID	VARCHAR2 (3)
EMAILADDRESS	VARCHAR2 (100)
ACTIVE	CHAR (1)
APPTVIEWDURATION	NUMBER (10)

Reference Information

COUNTY

Column	Type
HEALTHCOUNTYID(PK)	**Not Null VARCHAR2(3)**
NAME	VARCHAR2(30)
FIPSCODE	VARCHAR2(4)
STATECD	Not Null VARCHAR2(2)

Vendor Events and Activities tables

EVENT

EVENT

EVENT

- Activity
  - Activity
  - Activity
  - Activity
- Activity
  - Activity
  - Activity

- Activity
  - Activity
  - Activity
  - Activity

MONITORINGVISIT

VENDORID	VARCHAR2(6) Not Null
MONITORINGVISITID(PK) NUMBER(10) Not Null	
STAFFID	VARCHAR2(10) Not Null
VISITDATE	DATE
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
UPDATERECORD	VARCHAR2(1)
ACTIONDATE	DATE
COMMENTS	VARCHAR2(4000)
PHYSICALLYONSITE	VARCHAR2(1)
RECOMMENDCOMPBUY	VARCHAR2(1)

EVENT

EVENTID(PK)	**NUMBER (10) Not Null**
VENDORID	VARCHAR2 (6)
DESCRIPTION	VARCHAR2 (70)
STARTDATE	DATE
TYPE	NUMBER (3)
SANCTIONPOINTS	NUMBER (3)
CREATEUSERID	VARCHAR2 (10)
CREATEDATE	DATE
UPDATERECORD	VARCHAR2 (1)
ACTIONDATE	DATE
STAFFID	VARCHAR2 (10)
APPLYUPTO	DATE

MONITORINGVISITREASON

MONITORINGVISITID(PK) NUMBER(10)	
REASONCODE(PK)	**VARCHAR2(3)**
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
UPDATERECORD	VARCHAR2(1)

EVENTRELATIONSHIP

EVENTID(PK)	**NUMBER(10) Not Null**
FOLLOWUPACTIVITYID(PK)	**NUMBER(10) Not Null**
[EVENTTYPE	NUMBER(3)] meaningless
UPDATERECORD	VARCHAR2(1)

FOLLOWUPRELATIONSHIP

PARENTFOLLOWUPACTIVITYID(PK) NUMBER(10) Not Null	
CHILDFOLLOWUPACTIVITYID(PK) NUMBER(10) Not Null	
[CHILDFOLLOWUPACTIVITYTYPE NUMBER(3)] meaningless	
UPDATERECORD	VARCHAR2(1)

FOLLOWUPACTIVITY

FOLLOWUPACTIVITYID(PK) NUMBER (10) Not Null		
VENDORID	VARCHAR2 (6)	Not Null
STARTDATE	DATE	
TYPE	NUMBER (3)	
SANCTIONPOINTS	NUMBER (3)	
CREATEUSERID	VARCHAR2 (10)	
CREATEDATE	DATE	
UPDATERECORD	VARCHAR2 (1)	
ACTIONDATE	DATE	
STAFFID	VARCHAR2 (10)	
APPLYUPTO	DATE	

FINALDISPOSITION

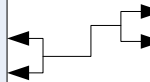| |
|---|
| VENDORID VARCHAR2 (6) |
| FINALDISPOSITIONID(PK) Not Null NUMBER (10) |
| FINALDISPOSITIONDATE DATE |
| OUTCOME VARCHAR2 (2) |
| REMOVEDSANCTIONPOINTS CHAR (1) |
| POINTSREMOVED NUMBER (3) |
| CREATEUSERID VARCHAR2 (10) |
| CREATEDATE DATE |
| UPDATERECORD VARCHAR2 (1) |
| ACTIONDATE DATE |
| COMMENTS VARCHAR2 (4000) |

VIOLATION

VIOLATIONID(PK) NUMBER(10)	
STAFFID	VARCHAR2(10)
VENDORID	VARCHAR2(6)
IDENTIFIEDDATE	DATE
OCCURREDDATE	DATE
VIOLATIONTYPE	VARCHAR2(3)
MONITORINGAREA	CHAR(1)
SANCTIONPOINTS	NUMBER(3)
CHECKSERIALNUMBER	VARCHAR2(8)
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
UPDATERECORD	VARCHAR2(1)
ACTIONDATE	DATE
VIOLATIONSOURCE	VARCHAR2(4000)
APPLYUPTO	DATE

VIOLATIONTYPE

CATEGORY(PK)	**VARCHAR2(20)**
VIOLATIONTYPEID(PK)	**VARCHAR2(3)**
DESCRIPTION	VARCHAR2(135)
SANCTIONPOINTS	NUMBER(3)
SORTVALUE	VARCHAR2(3)
CREATEUSERID	VARCHAR2(10)
CREATEDATE	DATE
MODIFYUSERID	VARCHAR2(10)
MODIFYDATE	DATE
UPDATERECORD	VARCHAR2(1)
DAYSTOAPPLY	NUMBER(5)
USEFORMULA	CHAR(1)
DAYSDQ	NUMBER(5)

A "Y" in Violation MONITORINGAREA = "MONITORAREA" Category in ViolationType
An "N" in Violation MONITORINGAREA = "VIOLATIONTYPE" Category in ViolationType

Rhode Island EBT/UPC tables

EBTAUTHORIZEDUPC

UPCCD(PK) VARCHAR2 (20) Not Null
STATECD(PK) VARCHAR2 (2) Not Null
UPCDESCRIPTION VARCHAR2 (50) Not Null
UNITOFMEASURECD VARCHAR2 (6) Not Null
UPCPACKAGESIZEUNITS NUMBER (5,2) Not Null
QUANTITY NUMBER (5,2) Not Null
ALLOWABLE CHAR (1) Not Null
STARTDATE DATE Not Null
ENDDATE DATE Not Null
PLUIND CHAR (1)
CREATEUSERID VARCHAR2 (20)
CREATEDTTM DATE
MODIFYUSERID VARCHAR2 (20)
MODIFYDTTM DATE
DISTRIBUTIONITEMID NUMBER (18)
FOODCATEGORYCD CHAR (2)
FOODSUBCATEGORYCD CHAR (3)
BENEFITUNIT VARCHAR2 (50)
ITEMPRICE NUMBER (6,2)
PRICETYPE VARCHAR2 (2)
CARDACCEPTORIDENTIFICATIONCODE VARCHAR2 (15)
PURCHASEINDICATOR NUMBER (1)
UPCPLUDATALENGTH VARCHAR2 (2)
REBATEITEM VARCHAR2 (1)
SHORTPRODUCTDESCRIPTION VARCHAR2 (24)
PRODUCTSTATUS CHAR (1)
PRESCRIPTIONREQUIRED CHAR (1)
MANUALAUTHORIZATIONFLAG CHAR (1)
INCLUDEININVENTORYAUDIT VARCHAR2 (1)

EBTFOODCATSUBCATEGORY

FOODCATEGORYCD (PK) CHAR (2) Not Null
FOODSUBCATEGORYCD (PK) CHAR (3) Not Null
FOODCATDESCRIPTION VARCHAR2 (50) Not Null
FOODSUBCATDESCRIPTION VARCHAR2 (50) Not Null
UNITOFMEASURECD VARCHAR2 (6) Not Null
COMMENT_TEST VARCHAR2 (30) Not Null
CREATEUSERID VARCHAR2 (20)
CREATEDTTM DATE
MODIFYUSERID VARCHAR2 (20)
MODIFYDTTM DATE
SUBCATSHORTDESCRIPTION VARCHAR2 (50)
ACTIVE VARCHAR2 (1)

Food Prescription Clean up view

FOODPRESCRIPTIONITEM FIC

STATEWICID VARCHAR2 (8)
PRESCRIPTIONDATE DATE
FOODPRESCRIPTIONITEM NUMBER (10)
ITEMQUANTITY   NUMBER (3)
SPECIALRXSTART DATE
SPECIALRXEND   DATE

FOODPRESCRIPTIONTYPEITEMS FT

FOODPRESCRIPTIONTYPEID NUMBER (10)
PRESCRIPTIONITEMID NUMBER (10)
CREATEUSERID VARCHAR2 (10)
CREATEDDATE DATE
MODIFYUSERID VARCHAR2 (10)
MODIFYDATE DATE
QUANTITY NUMBER (3) Not Null

TEMPFIITEMCNT T

STATEWICID VARCHAR2 (8)
PRESCRIPTIONDATE DATE
NBRSCT NUMBER

TEMPFITYPEITEMCNT TF

FOODPRESCRIPTIONTYPEID NUMBER (10)
NBRFICT NUMBER