



**IFMS Advisory Committee Meeting Minutes
August 15, 2019**

ATTENDEES

| Region | Name | Present | Region | Name | Present |
|---------------------|--|----------------|---------------|------------------|----------------|
| NAFDPIR | *Mary Greene-Trottier | ✓ | Western | *Greg Nothstine | ✓ |
| NAFDPIR | *Jaime Prouty | ✓ | Western | *AC Sanchez | ✓ |
| NAFDPIR | *Marissa Fuller | ✓ | FNS | *Linda Munday | ✓ |
| NAFDPIR | *Rex Hailey | ✓ | FNS | *Mike Baker | ✓ |
| Midwest/Northeast | *Joe Van Alstine | ✓ | FNS | *Dennis Sullivan | ✓ |
| Midwest/Northeast | *Kris Schwiderson | ✓ | FNS | Todd Griffith | ✓ |
| Mountain Plains | *Red Gates | ✓ | FNS | Laura Castro | ✓ |
| Mountain Plains | JoNell Charboneau and Jani Adams for *Brooke Black | ✓ | FNS | Barbara Lopez | ✓ |
| Mountain Plains | *Connie Thompson | ✓ | IFMS Team | Rob Streiker | ✓ |
| Southwest/Southeast | *Jerry Tonubbee # Rachel Yandell | ✓ | IFMS Team | Aaqil Mohammad | ✓ |
| Southwest/Southeast | *Elliott Sarracino | | IFMS Team | Gina Edwards | ✓ |
| Southwest/Southeast | *Sam Spang | | IFMS Team | Paula Joyce | ✓ |
| Southwest/Southeast | *Anna Sterner | | IFMS Team | Hoa Truong | ✓ |
| Western | *Benita Lewis | | | | |

* Committee Members, # User Forum Members



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I. Action Items from Last Meeting

| Action Item | Person Responsible | Completed |
|-------------|--------------------|-----------|
| None | | |

II. IFMS Demonstration

The meeting provided a live demonstration of some of the functionality of IFMS which included creating a household, head of household, and members and authorized representatives for the household. IFMS will have user-based roles. The demonstration focused on the certifier role. A certifier is able to add and modify household and household member information. Some of the features highlighted in the demonstration included:

- Viewing a list of all households
- Adding a new household
- Adding household certification date, length of certification, and status
- Viewing household changes in a history activity log
- Adding the federally recognized tribe for the household (optional)
- Elderly/Disabled flag for the household
- Data entry validation rules

The demonstration is not the final product; it was meant to solicit feedback in order to improve the design and functionality.

III. Questions and Answers and Comments

Topic: IPV

Question: Occasionally we have clients who are suspended for an IPV. Their children can still pick up, though. How can we address that?

Response: We will look into this further.

Question: Where would the IPV be documented?

Response: We have to look into this further.

Topic: Name of Household and Distinguish households with same last name

Question: In our communities, we have 40 or more families with the same last name, how would that affect this loading of the last name? Recommendation – add DOB and first name of head of household.



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Response: We will look at including this information on the page in order to help distinguish between household with the same last name.

Question: Will all household names begin with "The"?

Response: We will look to remove it.

Topic: Inactivate

Question: How would you remove a household member?

Response: You can mark the member as inactive for the household and the system will no longer count that person as part of the household size. You will be able to see that the person was previously part of the household.

Request: We would like to add an inactive reason "Transferred to SNAP."

Response: We will look at including this inactive reason.

Topic: Adding Comments

Question: Can we have notes available on the household screen saying who we contacted for dual participation, notation if someone moved out of the household, etc.?

Response: There is the ability to add comments at the household level.

Question: Will every menu have a comments section or will this be overall or somewhere where you can access to take a quick look at comments when going to certify.

Response: We have the ability to add comments at the household level. We are also working on the ability for you to create tasks for yourself which you can display via a calendar to easily keep track of actions needed for certification.

Topic: Location

Question: Do you have a near area to identify? We have people who are off the reservation, but they are near-by.

Response: We have the "Location" field where that information is currently captured in AIS. Location is defined by each ITO. During data conversion from AIS to IFMS, we will create the locations such as on reservation and near-by that are used by that ITO for those that use this field.



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Question: When adding a new household, can we put them in a district?

Response: This information is currently captured in the Location field in AIS. Each ITO can define their locations as they need to. During the data conversion process we will populate the Location field with the locations you use such as the various districts in a service area.

Topic: Race/ethnicity

Question: Where they identify their race, will there be an ability to recognize multiple ethnicities/races?

Response: Yes, multiple races can be captured if applicable. We also capture ethnicity.

Topic: User Login/Access

Question: I have three workers and we all work on it and we want to show who did the task. Do they have to sign in individually?

Response: Yes, everyone will have their own login. The system will record who does each task.

Question: When setting up the admin rights for allowing others to access the data, who will have that? You will set that up for us? And WBSCM can assign other people?

Response: Access will be role based. You will have to put in a request to FNS to set people up for you. It is not currently set up like WBSCM. We have an ITO Administrator role where you can have an overall view.

Topic: Existing data transfer to IFMS

Question: The data within AIS, how will that data transfer to IFMS?

Response: We're working on the translating of the data. We've been testing that out now and we'll work closely with each ITO to get their data transferred over to the new system.

Topic: Timeline

Question: What is the schedule for the IFMS phases?

Response: Phase one is the replacement of AIS which is anticipated to be rolled out in the second quarter of calendar year 2020. We are planning on a phased rollout so that everyone isn't converting to the new system at the same time. Phase two is the FFAVORS functionality and Phase three is the WBCM functionality. We don't have dates right now for phases two and three.



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Topic: Certification Letters

Question: Does the system do an automatic NOA for each client?

Response: Certification is not currently in scope. We will add this letter to the list of enhancements.

Question: It would be great if IFMS printed a specific letter to the client upon recertification notice instead of just having the reminder at the bottom of the order form. Also, an automatic letter for income verification for households certified for 2 years at the 1 year mark.

Response: Certification is not currently in scope. We will add these letters to the list of enhancements. The task feature can be used to remind staff to verify income at the appropriate time.

Topic: Inventory

Question: When adding inventory, will it be able to track “best if used by” dates?

Response: We need to discuss this further during inventory discussions.

Question: Will we have the ability to scan and receive inventory?

Response: We’re looking into this.

Topic: Testing IFMS

Question: Will the IFMS Committee have an opportunity to test the system before rollout?

Response: Yes. Right now, we just want to give you an initial look to make sure we’re going in the right direction. As we develop more functionality we’ll have additional demonstrations. There will be an opportunity for you to participate in user testing as we are farther along.

Topic: User Photo

Question: The icon on the far-right side of the screen, is that for photo identification?

Response: Each user of the system can choose to upload a photo of themselves if they want but it is not required.

Topic: General Comments

Comment: So far, I’m impressed!



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IV. Upcoming Events

In an upcoming meeting we'll start talking about the transition and training program to help you transfer over from AIS. We will also demonstrate additional functionality.

ACTION ITEMS

| Action Item | Person Responsible | Due Date |
|---|--------------------|-------------------|
| Review suggestions for inclusion in IFMS. | IFMS Team | September meeting |

NEXT MEETING

The next meeting will be scheduled in September.