



**IFMS Advisory Committee Meeting Minutes
January 23, 2020**

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	Barbara Lopez	✓
Mountain Plains	*Brooke Black	✓	IFMS	Gina Edwards	✓
Mountain Plains	*Connie Thompson	✓	IFMS	Paula Joyce	✓
Southwest/Southeast	*Jerry Tonubbee, James Anderson, Jamie Anderson, Trista Winnett, Jo Belk, Mary Gates, Tawanna Adams	✓	IFMS	Brian Velloza	✓
Southwest/Southeast	*Elliott Sarracino		IFMS	Rob Streiker	✓
Southwest/Southeast	*Sam Spang		IFMS	Julia Volpenhein	✓
Southwest/Southeast	#Julie Shaffer and staff for *Anna Sterner	✓			

* Committee Members, # User Forum Members



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Action Items from Last Meeting

Action Item	Person Responsible	Completed
None		

I. Transition Planning Activities

A. ITO Outreach Calls

The IFMS Team has been contacting each FDPIR Director to talk about the AIS to IFMS transition. These calls take about 30 minutes and Directors may include others that they wish to participate on the call. During these calls we discuss preference on when to transition to IFMS, internet connectivity, number of sites and AIS users, and whether you tailgate. We also capture your AIS data to begin testing the conversion from AIS to IFMS.

We are still trying to connect with about half of our FDPIR Directors. If you haven't done so, please respond to a meeting request and encourage others in your region to make sure that they also meet with us to discuss transition. This is an essential step for each ITO in order for you to be a part of the transition to IFMS.

During these meetings, several ITOs have volunteered to be early adopters to IFMS. We have also been hearing from ITOs that they would like to see demonstrations of IFMS.

B. ITO Transition Schedule

We are continuing to develop our transition schedule of when each ITO will transition to IFMS. There will be two phases of launch: those with tailgates where there is no internet and those who do not have tailgates. There will be a two month pilot for both phases. Following each pilot, we will slowly increase the number of ITOs that transition each month. We are developing the schedule with the information we gather in our calls with FDPIR directors.

C. ITO Demonstrations

We will conduct IFMS demonstrations for our entire FDPIR community to garner excitement and interest to transition to IFMS.

II. Demonstration Schedule

- Household Management/Customer Data Management User Forum - held in October
- Inventory Management User Forum – held in November

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- Reporting User Forum– held in December
- Issuance Part I User Forum– held in January (today)
- Issuance Part II User Forum- Planned for March
- Tailgating User Forum – Planned for April
- ITO IFMS Demos – Planned for February and March

III. IFMS Demonstration Scope

Today's demonstration includes the following:

- Guide Rate Tree
 - Category, Subcategory, and Product
 - Quantities selected, allowed, and remaining
- Initiate Issuance
 - From Issuance Transaction Screen
 - From Household Account Screen
- Issuance Type
 - Store Mode
 - Scanner entry
 - Manual entry
 - Ability to toggle between scanner and manual entry
 - Manual (Pick and Pack) Mode
- Search
 - Filtered lists
 - Search bar
 - Barcode Scan
- Issuance Error Handling
 - Guide Rate Errors
 - Inventory Availability Errors

IV. IFMS Benefits

There are some new features in IFMS that are not available in AIS for issuance which will be demonstrated today:

- Completely new and simple guide rate tree for improved guide rate visibility

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- By category, subcategory, and product
- Shows quantity for selected, allowed, and remaining
- No need to adjust issuance transaction for partial issuance, IFMS calculates remaining issuance balance
- Use guide rate tree for searching and filtering on material categories
- Issuance method (store or manual) defined by site to simplify issuance operations
- View all selected materials on one screen before completing issuance
- View guide rate units for items before selection
- Users can switch from scanner entry and manual entry during the same issuance transaction

V. Issuance Functionality in Development

There are several issuance features that are still in development and will be demonstrated in March. These include:

- Preset issuance by household size and site to pre-populate customer shopping carts
- Streamline barcode scanning screen options
- Print receipts
- Print the remaining shopping list
- Enhanced Guide Rate error messages
- Sort on materials in the material selection component
- Adjust a completed issuance
- Receive a skip month error when scanning the barcode for a skip item
- See dynamic remaining limits for categories subcategories, and product types so that you know exactly what a household has left to receive
- See and re-run failed issuance transactions

VI. Coming Attractions

A communication will be sent via our Regional Office staff to all FDPIR programs regarding IFMS this month. Outreach calls to the FDPIR Program Directors that we have



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not met with will continue so that we may discuss the AIS to IFMS transition for their ITO.

ACTION ITEMS

Action Item	Person Responsible	Due Date
None	None	

NEXT MEETINGS

The next user forum on additional issuance functionality will be scheduled for March. A user forum on tailgating is also planned for March. IFMS demonstrations to the entire FDPIR community will be scheduled for February and March.