



**IFMS Advisory Committee Meeting Minutes
October 3, 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 # John SeeWalker	✓	FNS	Barbara Lopez	✓
Mountain Plains	*Brooke Black	✓	FNS	Rob Streiker	✓
Mountain Plains	*Connie Thompson	✓	IFMS Team	Aaqil Mohammad	✓
Southwest/Southeast	*Jerry Tonubbee # Rachel Yandell	✓	IFMS Team	Gina Edwards	✓
Southwest/Southeast	*Elliott Sarracino	✓	IFMS Team	Paula Joyce	✓
Southwest/Southeast	*Sam Spang		IFMS Team	Trivini Madulluri	✓
Southwest/Southeast	*Anna Sterner # Julie Shaffer	✓	IFMS Team	Drew Robert	✓
Western	Dany Tobar and Becca McNeil for *Benita Lewis	✓	IFMS Team	Chetan Singh	✓

* Committee Members, # User Forum Members



**IFMS Advisory Committee Meeting Minutes
October 3, 2019**

I. Action Items from Last Meeting

Action Item	Person Responsible	Completed
Review suggestions for inclusion in IFMS	IFMS Team	Yes

II. Transition Program Overview

Phase 1 of IFMS is the replacement of AIS. Phase 1 development is scheduled to be completed in the second quarter of calendar year 2020. After the system is granted the authority to operate, there will be a rolling launch for ITOs to transition from AIS to IFMS.

Our transition program has a three prong approach to assist ITOs/SDAs to transition from AIS to IFMS.

First and foremost, we will have training available in various formats to assist with using IFMS.

Data Conversion. We will transfer over AIS data to IFMS and set up user accounts and other data as needed. We have begun to develop data conversion programs and are now ready to begin testing. We are looking for volunteers who are willing to provide their data to us so that we can test bringing the data from AIS to IFMS. We have security protocols in place to ensure safe data transport and use. Please let Linda Munday know if you are willing to provide your data to us for testing.

The third part of our transition program is launch preparation and scheduling. We will be developing a launch schedule and help you prepare for the cutover to IFMS and ensure that your program is ready.

III. Internet Connectivity Survey Results and Next Steps

Last month, we asked all of our FDPIR programs to complete an internet connectivity survey. The survey results will help us to better understand the concerns expressed regarding internet connectivity for IFMS.

Key Insights from the Survey:

- 57% of ITOs responded
- 0 facilities lack internet access
- 29 facilities use a compatible browser as a default

IFMS Advisory Committee Meeting Minutes October 3, 2019

- 11 have no compatible browser
- 25 likely need to switch browsers
- 3 lack internet where issuance occurs
- 17 have connectivity issues

We would like to increase our response rate so we are keeping the survey open through this month. If you have not had a chance to complete the survey, we would appreciate it if you can do this. Our Regional Office colleagues will be reaching out to those who have not yet responded.

We will be testing in IFMS to determine the minimum upload and download speeds needed and will identify those facilities that might be below the threshold.

We will begin to follow-up with identified facilities that have indicated internet connectivity issues, access limitations where issuance occurs, and weather related outages.

We will make recommendations for technology upgrades at specific facilities based on responses about internet browsers and connectivity speeds.

IV. Tentative Schedule for Upcoming User Demonstrations

Inventory Management – October 24

Inventory Management (continued) – November 14

Reporting – December 12

Issuance – January TBD

V. Household Management Feature Requests

- Dashboards in IFMS. Today we showed the Certifier Dashboard which will help a certifier manage daily work tasks.
- Limit use of SSN. We mask SSNs and provide enhanced search capabilities beyond name and SSN. We demonstrated this today.
- Ability to edit or delete SSN (for head of household). We demonstrated the ability to add, edit, or delete someone's SSN in August.
- Capture the federally recognized tribe for the household. We demonstrated this capability in August.

IFMS Advisory Committee Meeting Minutes October 3, 2019

- Provide history of household members (ability to see someone was part of the household even if they are no longer in the household.) We demonstrated this capability in August and today.
- Check for duplicates (see if participant is in more than one household at the same time.) IFMS currently supports this capability and it will be shown in a future demonstration.
- At our last demonstration, you asked us to add “Transfer to SNAP” as a reason for inactivating a household member. We have already responded to your request and added this option and demonstrated it today.
- Also, at our last demonstration, you asked for ways to distinguish households with the same last name. We have added this functionality and demonstrated it today.

VI. IFMS Demonstration Scope

The demonstration focused on the Certifier role and covered Household Management functions that were not previously demonstrated including:

- The dashboard of the certifier
- Enhanced search capabilities
- An enhanced household overview page with additional information about the household and household members, and how to edit a household member’s information and their status
- How to change a household member to the head of household

VII. Coming Attractions

The next user forum meeting dates will be scheduled.

We will be providing some of you the opportunity to “play around” in the system to give us additional feedback. This is not the testing that is done before we go live to ensure the system is ready for deployment. The system is still under development and we are working on many features and enhancing others. This is simply an opportunity for you to get a feel for the system and provide feedback. Our IFMS team is working to make this opportunity available to you in the near future and I will be sharing details with you soon.

VIII. Questions and Answers and Comments

Question: Will there be the functionality that exists in AIS with the counties? We use them for districts.

IFMS Advisory Committee Meeting Minutes October 3, 2019

Answer: Yes, this functionality exists in IFMS. (It was demonstrated in the last user forum.)

Question: Will IPV violations be in there?

Answer: IFMS will be able to handle IPV violations.

Question: If we have 5 certification clerks, they will all see the same information on the dashboard, correct?

Answer: Correct, all certifiers within the same ITO would see the same dashboard.

Question: If we have 3 different sites, each site's dashboard will be different or will it all be together?

Answer: For your entire ITO, you would see the same dashboard information.

Question: So if we have a site an hour away or so, the whole ITO can see the same dashboard.

Answer: Correct.

Question: So a client can go to any site within the ITO and get certified and issued?

Answer: Yes. They can go to any location within the ITO. They can be identified with the location where they usually go for pickup. You will be able to tell if they've been certified or picked up at a different location.

Question: Would we still need to keep our own files?

Answer: Yes, you would still use your paper or electronic files that you currently use. You can record in notes in IFMS what documents you have associated with the application. Electronic files is on our list of enhancements, but our first priority is to get everyone off AIS.

Question: As people make calls and certify, then the dashboard will be updated across the board?

Answer: Yes.

Question: Does it update live?

Answer: We have a refresh button that will refresh the data.

Question: Will there be a way to tell who certified who during the process and capture how many certifications they've done?

Answer: Yes, you will be able to see this information.

Question: Will the dashboard (or reports) include the number of households that are size of 1, 2, 3, etc.?



IFMS Advisory Committee Meeting Minutes October 3, 2019

Answer: It doesn't currently, but we can look into this as a potential enhancement.

Question: Is there a way to put appointments on the calendar?

Answer: Yes.

Question: Can we see the location and who the event is for on the calendar event?

Answer: The event will be tied to the user who is creating it and you can specify which household you want to tie it to and the person as well.

Question: We have 5 certifiers in one location, is there a way that the supervisor could see all of the certifiers' calendars? Because if one calls in sick one day and she had 5 appointments on her calendar we need to know this. Can there be a master calendar? Or an individual calendar for each user?

Answer: We will research a "master calendar."

Question: If someone applies are they required to have an SSN?

Answer: IFMS does not require SSNs

Question: Can you search by birthdate?

Answer: Yes

Question: SSN is only available to certifier, do others have access to SSN who aren't certifiers?

Answer: If staff need to access participant data that are not certifiers, the SSNs will be masked.

Question: Will IFMS identify where users participate at? We have people who hop from one location to another.

Answer: You would get a duplicate hit if they appear in the system twice.

Question: There has to be some place that shows where they last came from because we have so many people with the same name on different reservations.

Answer: The Organization will tell you where they are tied to for the household.

Question: Say we get a notification and we look in the database to see if they have SNAP benefits, will there be a way to record in IFMS to see when the last time the household applied and a way to show they have SNAP, so we can track when the household comes back to double check everything?

Answer: Yes, we can keep track of the history here.

Question: Can you mark a whole household as moving to SNAP?

Answer: Yes.



**IFMS Advisory Committee Meeting Minutes
October 3, 2019**

Question: Duplication of children. Will a red flag pop up stating they are in someone else’s household?

Answer: When you enter someone, it will run a duplication check and it will identify that there is a duplicate and you can investigate.

Question: In AIS to deactivate a household we change the date. When you deactivate a household in IFMS, does that automatically update the certification date?

Answer: We are looking at all of the certification rules.

Question: When you deactivate someone when deceased, the household may not be eligible anymore, so will the system catch this?

Answer: Certification is done outside of the system right now. So, it is upon the certifier to reassess the household to see if they should still be certified and what the period should be.

Question: There are some pretty unique household compositions where there is a shortage of housing. If someone has 9-11 household members and only half are adults, if the main becomes deceased and the rest of the family wants to split up that household, can you automatically promote someone to the head of household, that would be up to the remaining members to decide who that is?

Answer: Yes.

Question: So if that happens, we need to notify them to do a new application?

Answer: Yes. Right now, the certification piece is outside of the system, so it is up to the certifier to take care of this and make sure to record it within the system.

ACTION ITEMS

Action Item	Person Responsible	Due Date
None	None	

NEXT MEETINGS

The next meetings will be scheduled for October 24, November 14, December 12, and January TBD.