

## Extending WBSCM to Recipient Agencies *Preparation and Planning Steps for State Distributing Agency*

*Are you ready to extend WBSCM to Recipient Agencies (RAs)? The State Distributing Agency (SDA) is responsible for making and enforcing decisions about operations, setting up RA access in WBSCM, ensuring RA staff are trained, and providing guidance and operational support for RA activities in WBSCM when needed. Careful consideration of these factors will help you evaluate your preparedness to roll down WBSCM to RAs.*

### **WBSCM OPERATIONS CONSIDERATIONS**

Along with the technical steps involved in getting RAs set up and trained in WBSCM, there are several things to consider about operations such as placing orders, receiving deliveries, and inventory management. Although pre-implementation decisions may change with experience, it is important to have some guidance in place before extending WBSCM to RAs. SDA decisions will bridge technical preparedness and real world usage of WBSCM in day-to-day operations.

#### **1. General Questions**

- **Deliveries** – Where will shipments be delivered? Who will receive, confirm, and submit goods receipts in WBSCM? If they are managed at a centralized location, how will materials be distributed to RAs? Who will maintain delivery records and how?
- **Inventory Management** – Where will receive commodities be stored? If they are managed at a centralized location, how will inventory information be shared with RAs? Who will maintain the inventory records and how?
- **Co-Op Arrangements** – A Co-Op may place requisitions on behalf of member RAs and reviews/consolidates RA requisitions before they are submitted to the SDA for approval. If there are several RAs who work together and coordinate or share in ordering responsibilities, it may make sense to group them together through a cooperative (Co-Op) arrangement. For example, some school districts oversee ordering for their schools. If a Co-Op organization hierarchy is set up, how will responsibilities related to ordering, receiving, and inventory management be handled?
- **DoD Fresh Entitlement Set-Aside** – If applicable, how are entitlement funds assigned for DOD Fresh-- at the district level or for individual schools? (Note: These orders are managed through [FFAVORS](#), a separate system. Considerations here are for WBSCM entitlement budgeting purposes only.)

#### **2. RA Catalog**

In managing the catalog available to RAs, SDAs should consider the capacity of distributors, processors, and warehouses as well as the impact on SDA workload to consolidate orders.

- **Catalog Elements** – It is unlikely that the SDA will offer the full catalog and all available delivery dates to RAs. What items will be offered and what delivery periods will be available to them?
- **RA Order Due Date** – SDAs will need time to consolidate the requisitions received from RAs and Co-Ops into sales orders and make corrections as needed. How much lead time is required to accomplish

this? SDAs will use this information to determine the due dates for receiving requisitions from RAs and Co-Ops.

### 3. Order Consolidation

The SDA is responsible for consolidating RA requisitions by material, delivery date, and delivery location to create a full truckload (FTL) for the sales order, usually with no more than three stops along the delivery route. What are the minimum quantities (number of cases) that can be ordered by an RA? Planning in respect to full truckloads will simplify consolidation of orders by the SDA, reducing delays while waiting for additional requests and/or over-ordering in lieu of responding to actual product demand by the RAs.

- **RA Requisitions** – The number and size of RAs impacts the amount of time and effort needed to schedule and manage requisitions through the Consolidation Workbench (CWB). When RAs request smaller quantities, more time may be required to receive other requisitions to meet the FTL quantity.
- **RA Coordination** – Will you invite RAs to request material quantities needed to complete an FTL? How will this be communicated? How will you coordinate distribution to these additional RA locations if not delivered directly to them?
- **Split Shipments (with other SDAs)** – You may want to split or share loads with other USDA Food agencies. There is a dedicated “Full Truck Load Requests” thread on the WBSCM forum for sharing and replying to partial shipment opportunities with a partner SDA to reach FTL quantities. How will you manage split shipments? How will these commodities be distributed to the RAs who ordered them? When will this occur?
- **Locking** – Table-locking is an inconvenience that SDAs and RAs may encounter and should recognize. When the SDA is consolidating requisitions in CWB, RAs or other users may not be able to access a requisition. The likelihood of table-locking increases when the RA’s requisition includes more different materials. What communication or scheduling strategies between the SDA and RAs might help to minimize inconvenience?

### 4. Goods Receipts

FNS Policy directs that a goods receipt must be completed no more than two calendar days from the date received. How will this be managed? How will the SDA enforce the two-day deadline to the RAs? Will the RA enter its own receipts or will the delivery location (such as a warehouse) enter the receipts on their behalf? Additional set up may be required to add one or more Ship-To Organization(s) and assign the ability to receipt to its users (i.e., Organization Administrator role).

### 5. Redistribution

SDAs may “transfer” unallocated product from the SDA to RA(s) or between RAs through Redistribute Order Quantities function in WBSCM. Tools are available to manage how entitlement is impacted. When these materials are redistributed, how will you handle RA entitlement charges? Will the RA receiving product be charged at the time of transfer? Are there circumstances where the entitlement charge will not be transferred?

## **RECIPIENT AGENCY SETUP**

The SDA is responsible for setting up RAs in WBSCM. There are several steps involved in this process, and the time needed to do so will vary depending on the number of RAs involved. Additional steps may be involved to create a Co-Op arrangement or add new Ship-To locations.

### **1. Create Recipient Agencies**

- Manually enter or use the upload file to create new organizations in WBSCM. Field mapping information located on the [FDD website](#) under “Upload RA Updates files”. (See **RESOURCES** section.)
- Assign Ship-To(s) to the RA.
- Assign a plant (National Warehouse) for each RA.
- Assign program(s) to the RA.

*Related WBSCM work instructions: Create Recipient Agency (RA), Import New RA Organizations*

### **2. Manage RA Catalog**

- Create a catalog view for RAs, which is derived from the full version of the catalog from FNS. The SDA may select the materials that will be available to their RAs.
- Select the due dates for each material that will be available to RAs.
- Enter additional information to calculate the RA requisition due date (number of days prior to SDA’s order due date).
- Assign the catalog view to RAs.

*Related WBSCM work instructions: Create RA Catalog Views, Maintain RA NLT Dates and Delivery Periods, Assign Catalog Views to RAs*

### **3. Entitlement Management**

- Enter RA entitlement manually or use the upload file information located on the FDD website under “Entitlement files”. Upload to WBSCM. (See Resources section.)
- If applicable, enter DOD Fresh set-aside for RA. (If this is tracked in FFAVORS at school district level, a calculation may be needed to determine the set-aside amount for individual schools.)
- To receive a weekly email notification that lists the RAs that have met the a predetermined entitlement spending limit (e.g., 100%), update the Notification Percentage for each program.
- To prevent RAs from placing further requisitions once they have spent a predetermined percentage of their entitlement (e.g., 100%), update the Stop Order Percentage for each program.

*Related WBSCM work instructions: Maintain RA Entitlements, Upload RA Entitlements, Set Entitlement Tolerance*

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#### 4. User Administration

- Create at least one user for each RA with the Organization Administrator and User Administrator roles. This will allow the RA to create and manage additional users for their own organization in the future.
  - A user/org administrator for each new RA Organization is included as part of the upload in “Create Recipient Agencies” above.
  - SDA Organization Administrators can also manually create new users for RAs (and Co-Ops) and assign any applicable RA roles to those users.
- Each new RA WBSCM user will need to obtain Level 1 eAuthentication (eAuth) at <https://www.eauth.usda.gov>. When a new user profile is created in WBSCM, the user will receive a “welcome” email with instructions to create an eAuth account and link it to their new WBSCM user profile.

*Related WBSCM work instructions: Import New RA Organizations, Create User*

#### **RA TRAINING**

Because RA functions in WBSCM are limited, the training requirement is not extensive. The following are some suggestions.

##### **1. Hands-on Training**

Depending on the deployment option selected, hands-on training may be offered at State, regional, or local sites. For learning and practice purposes, SDAs and RAs may request access to the WBSCM training environment (NTRN) through the WBSCM Service Desk. This allows new users to work with WBSCM transactions and sample data in a safe environment as they learn.

##### **2. Webinar Demonstration**

Generally, webinars are not ideal for hands-on type of learning, but they may be practical for small groups or non-technical overviews of WBSCM or operational activities.

##### **3. User Guides and Reference Documents**

In addition to the training materials and work instructions available in WBSCM under the “Help” tab, several SDAs have created and/or adapted their own user guides for WBSCM. See **RESOURCES** section for examples of websites containing WBSCM reference materials.

## **IMPLEMENTATION**

The last thing to consider is the timing and reach of rolling out WBSCM to the RAs.

### **1. Phased Roll-Out**

- By size
- By geographic area
- By expertise
- By program

### **2. All RAs at Once (“Big Bang”)**

## **RESOURCES**

There are a number of general resources available on the FNS public website and within the WBSCM application. Other SDAs and the FNS Regional Office can provide additional information, ideas, and guidance enriched with on-the-ground experience and lessons learned from those who have extended WBSCM to their RAs. Lastly, FNS staff at the National Office may be able to assist with specific questions or unusual issues.

### **1. General Resources**

- **WBSCM Information on FDD Website** – This website provides important contact information, archived WBSCM newsletters, system requirements and technical, information for uploading data to the system, status of reported technical defects, and the ordering schedule for the current catalog.

<http://www.fns.usda.gov/fdd/wbscm-information>

- **WBSCM Launch Page** – This website includes links to both the “live” WBSCM application and the hands-on practice environment (NTRN) as well as contact information for the WBSCM Service Desk.

<http://www.usda.gov/wbscm>

- **WBSCM Help Materials** – From the “Help” tab in the WBSCM application, users can access a document library with job aids, work instructions, and other training materials pertaining to specific types of activities or transactions. All resources mentioned in this document can be found under **Work Instructions -> External -> Fulfillment -> Domestic**.

- **WBSCM Service Desk** – The WBSCM Service Desk can assist with technical challenges and guidance with WBSCM transactions.

- Phone: 877-WBSCM-4U (877-927-2648)
- Email: [WBSCM.servicedesk@caci.com](mailto:WBSCM.servicedesk@caci.com)
- Web Service Ticket: <https://cacifedramp.service-now.com/wbscm/>

### **2. State Resources**

- **Staff** – Several States are already working with their RAs in WBSCM. They can provide insights and share lessons learned with you. These States may be able to help you in both the planning and implementation phases. If unsure who to reach out to, the Regional Office may be able to assist you.
- **Websites** – Additionally, a number of States have publicly accessible websites where they share reference materials, training resources, and similar documents that are relevant to training and supporting RAs on expectations and guidelines, the ordering process, and the use of WBSCM. These resources not only serve as useful examples of how to disseminate information to your RAs; there are also several documents which can be adapted to meet your own needs such as training presentations, explanations of RA responsibilities, and reference documents.

### 3. FNS Staff

- **Regional Office** – Generally, your first point of contact should be the Regional Office. They are more familiar with the programs, trends, and concerns that are relevant to each State. Additionally, the Regional Office can match SDAs who are new to extending WBSCM to their RAs to those who have already rolled out WBSCM to their RAs (or are in the process of doing so). The Regional Office may also coordinate newsletters, organize conferences, or use other tools to share information and provide a forum for discussion of problems, concerns, and solutions.
- **National Office** – The FNS National Office oversees Food Distribution and the systems that support it; however, they are not able to assist with day-to-day operations. Please limit routine questions or requests for direct assistance from National Office to isolated system issues and concerns that are too complex to address via the WBSCM Service Desk.