



## RETAIL TECHNOLOGY FUNCTIONALITY & PARAMETER GUIDELINES FOR PRODUCE PRESCRIPTION (PPR) TRANSACTIONS

Resource Prepared by  
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CREATED BY GUSNIP NTAE CENTER

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## TABLE 1: VERSION CONTROL

VERSION	DATE	DOCUMENT CHANGE	RESPONSIBLE PARTY
V 1.0	08/21/2023	Initial Version of Document	Workgroup



## TABLE 2: ACRONYMS AND TERMS

ACRONYM/TERM	DEFINITION
Adjudication	Specifically related to POS or other retail technology methods to determine individual items or other classifications of items eligible for certain incentive or PPR programs.
Agent	A person performing certain tasks on behalf of a retailer related to the operation of third-party programs such as loyalty and online shopping services.
DEV	Digitally Enhanced Voucher. A preprinted paper voucher containing barcodes or other digital symbology to provide limited automated capabilities to process PPR transactions at the POS.
EBT	Electronic Benefits Transfer.
EPS	Electronic Payment Systems including card-based and digital platforms.
F&V	Fruit and vegetables.
FNS	Food and Nutrition Service.
Food is Medicine (FIM)	<i>Food Is Medicine</i> is a practice built on the knowledge that food and diet play important roles in disease prevention and management.
Food Retailer	Direct-to-consumer food retailers including supermarket, grocery store, online food shopping, corner store, bodega, and farm retail operations.
GusNIP	Gus Schumacher Nutrition Incentive Program.
HBC	Healthy benefit card.
HIPAA	Health Insurance Portability and Accountability Act. Includes national standards to protect individuals' medical records and other individually identifiable health information.
Mixed Tender	A transaction where a customer uses multiple forms of payment tender during a single transaction.
NGAF	National Grocers Association Foundation.
NTAE	Nutrition Incentive Program Training, Technical Assistance, Evaluation and Information Center.
Parameter	A quantity or value that changes the characteristics of a system or a function.



## TABLE 2: ACRONYMS AND TERMS (CONTINUED)

ACRONYM/TERM	DEFINITION
PCI DSS	Payment Card Industry (PCI) Data Security Standard (DSS).
PLU	Price Look Up code.
PM	Project Management or Project Manager.
POS	Point-of-sale, or generically, electronic cash register and retail checkout systems.
PPR	Produce prescription.
QR Code	A type of barcode that can be read easily by a digital device and which stores information as a series of pixels in a square-shaped grid.
Retail Technology	Use of technological tools/solutions to enhance operations and improve customer experience including POS and other technologies surrounding food retailing.
SCO	Self-Checkout.
SNAP	Supplemental Nutrition Assistance Program.
TOKEN	An object serving as a visible, tangible, or digital representation of money or payment type exchanged during a retail transaction. Examples include, but are not limited to, paper vouchers, forms of scrip, card-based, shopper loyalty programs, and digital payment methodologies.
TPP	Third Party Processors. Generally nonbank entities providing merchants with card processing services.
UPC	Universal Product Code.
USDA	United States Department of Agriculture.
WIC	Special Supplemental Feeding Program for Women, Infants and Children.



**FOREWORD** The working group which developed this document had the following members:

**TABLE 3: WORKGROUP MEMBERS**

ORGANIZATION REPRESENTED	REPRESENTATIVE
About Fresh	Mariah Notini
Community Food & Agriculture Coalition	Bridget McDonald
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We would also like to acknowledge the retail technology solution providers who reviewed, provided input and expressed their support for the document.

**TABLE 4: POS PROVIDERS AND PROCESSORS PROVIDING INPUT**

ORGANIZATION REPRESENTED	REPRESENTATIVE
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## 1. INTRODUCTION

The purpose of this document is to establish a common set of guidelines for retail technology and electronic payment system solution providers to use when enhancing or creating systems to support in-store or online shopping produce prescription (PPR) programs or, more widely, Food Is Medicine (FIM) programs. While forms of paper scrip not using any form of technology are used in PPR programs, the focus of this document is on forms of automated electronic solutions creating accuracy and efficiency at the checkout.

This document is focused on projects funded by the Gus Schumacher Nutrition Incentive Program (GusNIP). Other public or private funding mechanisms may have program design characteristics differing with GusNIP requirements. This document and solutions based on this document may be useful for a broad range of other prescriptive food project designs.



GusNIP was established by the **U.S. Department of Agriculture (USDA)** through the 2018 Farm Bill to support nutrition incentive (NI) and PPR projects. GusNIP is authorized under 7 U.S.C. 7517, which directs the USDA to provide funding to conduct and evaluate projects providing incentives or prescriptions to increase the purchase of fruits and vegetables by low-income consumers.



GusNIP was funded with \$250M in the 2018 farm bill. At the time of this document publication, there were 116 GusNIP-funded PPR projects. Brick and mortar food retailers, along with farmers markets, participate in PPR programs across the United States.



While the 2018 Farm bill does provide a continuing funding stream beyond 2023, as of the publication date of this document, there is no clear indication as to whether the funding level will be increased in subsequent farm bill legislation. If GusNIP and other privately funded FIM healthy food incentive programs continue to expand, the demand for retail technology and payment system solutions is anticipated to increase annually at a significant rate.



By bringing together multiple collaborators, including local and state governments, non-profit organizations, educational institutions, farmers, and food retailers, GusNIP grants help to increase produce purchases by participating individuals and households.

In fiscal year 2019, \$8.5 million was provided by USDA for the creation of the **GusNIP Training, Technical Assistance, Evaluation, and Information Center (NTAE)**. The NTAE Center created what is now called the Nutrition Incentive Hub, a coalition of partners actively supporting NI and PPR projects through training, technical assistance, reporting, and evaluation support to program operators.

One of the efforts of the Nutrition Incentive Hub is to develop and provide a set of common requirements, functions, and parameters that can be used by retail technology and payment network system providers to implement GusNIP PPR projects with food retailers in a generic manner. Development of common requirements will help support all GusNIP and non-GusNIP PPR projects across the United States.



## The goals of this document are highlighted below:

- Provide guidance to retail technology and payment network system providers to develop PPR solutions through modification of existing retail technology system configuration, development of additional software, or modification of payment network system capabilities.
- Provide a list of the suggested functions and configurable parameters to support development of PPR solutions as enhancements for existing retail technology systems and be included as core functionality for future product updates or releases. Where possible, parameters provide program funders with a level of customization options to meet their project objectives.
- Provide a basic transaction flowchart for developer reference.
- Provide a list of standard reports provided by the retail technology or payment network system to support the PPR program.

## 2. SYSTEM REQUIREMENTS

**Program operators of a GusNIP grant (non-profit organizations, state governments, local governments, community-based organizations, healthcare organizations, or educational institutions) partner and collaborate with healthcare providers and food retailers. As referenced earlier, there are other non-GusNIP programs using prescriptive food as part of FIM projects. The following bullet points provide a high-level recap of how a PPR project works.**

- A healthcare provider or community partner typically screens and verifies eligibility for a PPR and prescribes the benefit.
- The prescription benefit may be issued in a variety of manners. In some projects, tokens are issued to participants who then present the token at food retailers for redemption. Some examples of tokens include paper coupons with digital barcodes/QR codes (digitally enhanced vouchers) or plastic magnetic stripe cards representing debit type accounts. In other situations, the benefit may be managed in a store's loyalty program to be spent when the recipient shops at the participating store. Other technologies for delivering benefits may emerge.
- Eligible participants then use the value of the prescription benefit to purchase eligible food items, as defined by the grantee and their retail partner.
- Food retailers are then reimbursed by the program operator, technology solution provider, or payment network on behalf of the program operator.



The workgroup has recommended the basic flows of PPR transactions provided below.

1. After a healthcare provider or clinician diagnoses the participant with a qualifying health condition, a token or voucher (herein referred to as token) representing a certain value for money will be provided to the participant – either while at the clinic or later.
2. Participant shops as normal, placing PPR-eligible items along with other non-PPR eligible items in the same shopping basket to be processed during a single checkout transaction. There should NOT be separate transactions for PPR-eligible and non-eligible items.
3. During checkout, the participant provides cashier, self-checkout, or online shopping platform with the PPR token.
4. An automated process triggered by the PPR token occurs that determines item eligibility and applies value from the PPR token as a discount or form of payment tender to the transaction total.
5. The PPR transaction receipt must provide the amount of PPR value redeemed during the transaction and any remaining token value regardless of the token methodology. No remaining token value is to be returned as cash to the participant.
6. The PPR solution automatically accumulates information for required reporting to program operators. Reports may be initiated by the retailer or automatically initiated by the solution provider and sent to the program operator.

## 2.1 SOLUTION FUNCTIONALITY

Food is medicine and produce prescriptions are an evolving field of practice and this document represents the current minimum solution functionalities for PPR tokens as of publication date. This section of the document describes the basic functionality a retail technology or payment system needs in order to conduct PPR transactions. A more detailed description of three incentive alternatives, provided in section 2.2, includes a list of the system parameters to allow program configuration, and defines a standard set of reports that grantees must receive from food retailers.

Self-checkout and online shopping platforms must also consider implications surrounding functionality requirements. The following are minimum solution functionalities for PPR tokens using an electronic transaction mechanism.

1. Without cashier intervention, the solution automatically detects a legitimate token, identifies eligible items in a purchase, and deducts the appropriate benefit value amount from the transaction total.



2. Solutions must not collect state or local tax on items purchased using GusNIP PPR benefits.
3. PPR projects use dollar values rather than percentage off discounts
4. Ensure that the benefit amount the customer presents is applied only to eligible PPR items in the customer's basket and not applied to other ineligible items. Example: PPR participant uses \$50 benefit for purchase of \$49 eligible items. \$1 remaining value MUST NOT be applied to other ineligible items in the shopping basket.
5. For GusNIP PPR programs, the health provider partner is responsible for determining patient eligibility for participation in a PPR program. Retailers are NOT responsible for verifying PPR participant eligibility in order to redeem PPR benefits.
6. In some systems, item eligibility adjudication takes place at the store. In other systems, item adjudication is performed by a third-party external to the store. The POS must be able to accommodate either methodology of adjudication – at the POS level or via the third party.
7. Works in a transaction that may include an NI earning or redemption or other “Food Is Medicine” programs and supports separation of eligible items for multiple healthy foods benefit programs.
8. Works in a “mixed-tender transaction” with a combination of other tender types including SNAP (Supplemental Nutrition Assistance Program), WIC (Special Supplemental Feeding Program for Women, Infants, and Children), insurance healthy benefit cards, credit/debit, and cash during the same transaction (e.g., will apply PPR token value to eligible items in the basket).\*
9. Must be able to rotate ANY/ALL items from all departments across the store in and out of PPR eligibility via normal retailer POS item management or third-party provider item eligibility management. In the event of third-party item eligibility management, functionality must include capability to add and remove items at the POS in real-time.
10. Ability to redeem full value of digital PPR digital token value or partial redemption in a single transaction. Any residual digital token value to be available for subsequent transactions. Solution must NOT provide capability to return any remaining balance to the participant in cash or store credit regardless of transaction methodology used.
11. If the purchase total for eligible PPR items is less than the amount of the paper PPR token value, the remaining residual value may be subject to forfeiture by the participant. Programming to provide any residual value from the paper PPR voucher for use in future purchases of eligible PPR items, such as in the form of a POS printed barcoded coupon with expiration date, is recommended.
12. Retailers may only be reimbursed for the value of eligible PPR items purchased, NOT the token face value if a partial redemption less than token value occurs. This scenario must be followed in all PPR transaction solution methodologies.



13. Solution must be able to allow the food retailer, after agreement with the program funder, to set a maximum dollar amount redeemable in any single transaction for all methodologies.
14. Token expiration may be annual, quarterly, or monthly as determined by the program operator. The solutions must include the capability for automated token expiration date recognition for POS to decline the token.
15. Real time update of remaining token value, including loyalty programs, for subsequent transactions should be provided in solution.
16. Capabilities for offline processing and system recovery due to system outages must be provided.
17. Provide ability to prevent cash refunds or store credits issued when goods purchased with GusNIP PPR funds are returned by the shopper. Exchanges for the equivalent food products or other PPR-eligible products of the same value will be at the firm's discretion and/or based on their return policies for all customers – except for prohibited cash or store credit refunds.
18. All solution designs for all tokens must align with applicable state and Federal protections required for consumer and food retailer data privacy protection and data use.
19. Provides information needed to comply with required reporting for the project described in section 2.4.

\*There are items commonly eligible for multiple payment tenders, such as WIC and SNAP, that overlap with PPR projects. If the PPR participant is also using WIC, the first tender must be WIC EBT. Shoppers should then decide the sequence of subsequent tenders in order to maximize the value of other benefits, such as SNAP, during the same transaction.

## 2.2 PPR Transaction Models

The workgroup recognizes multiple models by which retailers may provide PPR benefits to eligible customers. Healthcare facilities or clinicians screen patients for eligibility in PPR projects.

### The models are\*:

1. Preprinted paper digitally enhanced voucher (DEV) that includes barcodes/QR codes or other digital technologies used on the voucher.
2. Card-based debit/credit type transactions.
3. Loyalty platforms.

\*NOTE: Other electronic and emerging digital technologies may provide additional PPR solutions.



Each method is described separately below.

## 2.2.1 Method 1 – Preprinted Paper Digitally Enhanced Vouchers (DEV)

In many cases where the pool of PPR participants is small, for example 50-100 participants, a simple paper voucher without any digital enhancement may be a perfectly valid method for conducting PPR transactions with certain food retailers. The key drawbacks to this approach would be the lack of automation in having the voucher determine item eligibility, the need for extensive cashier training, no self-checkout system capability, and no online shopping since simple paper vouchers for these transactions could be burdensome or impossible for the retailer to implement and control.

For larger PPR projects that may include 1,000 or more participants, or as smaller projects grow, removing the cashier from decision making during a transaction is critical to maintaining checkout efficiency and PPR project accuracy. Higher volume, multiline food retailers with self-checkout and online shopping capability require fast and efficient automated transaction processing.

The first method for providing a PPR token to participants that provides a low level of automated checkout capability is a preprinted paper digitally enhanced voucher (DEV) that includes a barcode and/or QR (Quick Response) code. PPR projects use dollar values rather than percentage off discounts.

Funding organizations must collaborate with the retailer and the retailer's POS provider to determine the appropriate digital symbology and a unique UPC/GTIN/PLU that is not used for any other purposes within retailer operations. The design of the token must ensure that printed digital symbology used on the front or back of the token does not interfere with the primary digital code triggering redemption of the token. Program operators, retailers, and technology providers must coordinate the design of digital tokens for optimal scanning/reading of token by POS systems.

The basic processing flow for this semi-automated method is provided below:

1. The voucher is preprinted with a barcode or other digital symbology that can be read or scanned by the retailer's POS system. Vouchers may be distributed to project participants in numerous ways including during the healthcare visit or mailed separately. Participants may receive a monthly, quarterly, or other interval of a benefit value that may be broken down into multiple smaller voucher values (e.g., \$50 per month benefit distributed as five \$10 vouchers).
2. Digitally enhanced vouchers may only be redeemed in food retailer partners as determined by the program operator.
3. Participants select eligible items along with other non-eligible items for purchase in a single transaction and either present the paper DEV to the cashier for scanning or scan the DEV at the self-checkout. DEV paper vouchers may be used at self-checkout (SCO) locations but must trigger self-checkout monitor to collect the used DEV.



4. The customer barcode or symbol on the voucher then automatically triggers a redemption process including:
  - Voucher has not expired.
  - The POS identifies eligible PPR items.
  - The POS or self-checkout calculates appropriate dollar amount to be deducted from the transaction total or is applied as a payment tender. *NOTE: No state or local taxes may be applied to items funded by the GusNIP PPR program.*
5. Depending on POS programming, the full or partial voucher value may be applied as a discount reduction to the transaction total or as a payment tender.
6. If the purchase total for eligible PPR items is less than the amount of the voucher value, the remaining residual value may be subject to forfeiture by the participant. Programming to provide any residual value from the voucher for use in future purchases of eligible PPR items, such as in the form of a POS printed barcoded coupon with expiration date, is recommended.
7. No unused partial redemption value may be returned to the participant as cash or store credit for any PPR benefit transaction.
8. Record unused/forfeited funds for use in reporting described in 2.4.3.

## 2.2.2 Method 2 – Electronic Card-Based Debit Account Model

The second method for providing produce prescriptions is to provide a participant with a type of debit card associated with a balance of funds maintained electronically by a financial technology service company.

1. Card-based systems must follow all required card network and retailer encryption and PCI compliance rules.
2. Cards may only be used in food retailer partners as determined by the project operator.
3. PPR participant shops as normal, placing PPR-eligible items and other non-PPR-eligible items in the same shopping basket to be processed during a single checkout transaction.
4. Participant swipes, inserts, taps, or scans card barcode/QR code via the POS system or self-checkout. Both chip and non-chip cards may be used for the solution. Cards should have human-readable account numbers on the card creating online shopping capabilities. Solution may require use of personal identification number (PIN) entered by participant.\*
5. Items eligible for PPR redemption are determined by the POS or third-party card network (adjudication).



6. The card network determines the PPR dollar amount to be deducted and approves or disapproves the card transaction.

7. The customer receipt provides information of the amount of PPR funds applied to the transaction and, preferably, the remaining card account available balance.

\* A defined hierarchy of payment processing or the option by the participant to determine the sequence of payment tender processing prompted on the payment terminal should be considered a critical part of solution. For example, WIC > PPR/HBC card or Nutrition Incentive > SNAP > credit/debit > check > cash, or other appropriate tender sequence. There are items commonly eligible for multiple payment tenders, such as WIC and SNAP, that overlap with PPR projects. Participants should have the option to associate eligible items with the corresponding form of payment matching their needs.

### 2.2.3 Method 3 – Store Shopper Loyalty Model

How PPR benefits are added to customer loyalty accounts is a primary challenge for using them. In one large scale PPR loyalty project, a special integration was developed where clinicians could add points/ value directly to an existing loyalty shopper account and even create new accounts for PPR participants while being seen in the clinic. There have been successful PPR loyalty projects where a digitally enhanced paper voucher is issued to a patient at the healthcare facility and then converted and added as points or dollar value when the PPR shopper visits a participating store.

Some retailers use loyalty platforms built into their existing POS system while others select third-party providers who can integrate with various POS systems. Loyalty platforms may provide extended PPR transaction processing beyond the capabilities of a store POS system. In many loyalty platforms, POS transactions are analyzed by the loyalty platform software in real or near-real-time, adding or subtracting value based on shopper earning or redeeming of points or dollar value. Loyalty platforms offer the capability to establish rules for product offers that include restricting specific offers, such as fresh produce, to a limited catalogue of eligible items.

This loyalty program PPR transaction flow is built upon the following assumptions.

1. The store has been selected as a participating redeeming partner of the PPR project.
2. The participant/shopper is enrolled in the store loyalty program.
3. The PPR value has been already applied to the shopper loyalty account by either a form of electronically importing the PPR value into the loyalty account or a conversion of a physical token (DEV) into the loyalty account at the store.





**Below is a representative flow for a loyalty PPR transaction.**

1. PPR participant shops as normal placing PPR-eligible items and other non-PPR-eligible items in the same shopping basket to be processed during a single checkout transaction. There should NOT be separate transactions for PPR eligible and non-eligible items.
2. Either prior to scanning items or during the transaction, participant swipes magnetic stripe card, scans barcode/QR code loyalty card, phone QR code, or key fob, or enters phone number into payment terminal or electronic device at the POS, self-checkout, or online shopping platform. Online shopping platforms may already recognize loyalty shopper from online login.
3. Items are scanned into the POS system by the cashier or by the participant using self-checkout or selected by the participant during online shopping.
4. Participant is provided option of all, partial, or no value of points or dollars be applied to the current transaction for eligible items.
5. Redemption of points or dollar value for eligible items are subtracted from the loyalty account and applied as a discount or payment tender for the transaction. Participant/shopper receipt is updated to show new points or dollar value of the account.

## 2.3 Processing Parameters

GusNIP policy does allow certain limited flexibility in how grantees design their project. For example, one project may provide a \$40 monthly benefit while a second program may want to provide a \$100 monthly benefit. Some programs may automatically expire benefits if not used within a specified timeline or benefits may accrue over a longer period. To provide project flexibility in a generic manner, solutions need to have configurable parameters. The following are possible configurable parameters that should be available within PPR solutions.

**TABLE 5: SUGGESTED INCENTIVE PROCESSING PARAMETERS**

PROCESSING PARAMETER	EXPLANATION/DESCRIPTION
Turn ON or OFF PPR Program	ON or OFF parameter where PPR redemption program is turned ON or OFF.
Maximum PPR amount allowed (per transaction)	This is the maximum PPR benefit amount that could be redeemed by the customer during a shopping trip.
Token expiration type (fixed date or # of days after issuance)	For PPR programs, this parameter would define whether tokens have a fixed expiration date or expire a set number of days after being issued.
Token expiration type 1 – fixed date	If the token has a fixed expiration date, this parameter will contain the expiration date for the token.
Token expiration type 2 – number of days from current date	If the token expires a set number of days after issuance, this parameter will contain the number of days from the current date for when the token would expire.



## TABLE 5: SUGGESTED INCENTIVE PROCESSING PARAMETERS (CONT.)

PROCESSING PARAMETER	EXPLANATION/DESCRIPTION
Token Redemption Restrictions	This is a yes/no parameter that indicates that the token is or is not restricted only to GusNIP PPR-eligible foods and may be used for a broad range of products by other types of funding organizations.
PPR Program start date	This parameter would define the start date for the PPR program.
PPR Program end date	This parameter would define the end date for the PPR program.
Date for final PPR redemptions	This parameter would define the end date for PPR tokens after the PPR program ends. This allows the program to sunset based on a parameter rather than either a token expiration date or manually turning the program off.

## 2.4 System Reporting Requirements

Unless otherwise indicated, the following reporting requirements are based upon a monthly reporting cycle. It also should be noted that in all reporting, customer confidentiality and privacy will be maintained.

### 2.4.1 USDA Required Reports

- ✔ Dollar Value of Redeemed PPR Tokens. This value must be the dollar value actually redeemed, not the face value of the token itself.
- ✔ Methodology of PPR transaction (Reported annually by the program operator – NO retail technology provider reporting impact.)
- ✔ Dollar Value of SNAP Sales
- ✔ Number of SNAP Transactions

### 2.4.2 Program Reports That May Be Requested by Funding Organization

- ✔ On Request – printed list of all items flagged as eligible for PPR redemption from the POS or third-party solution provider.

### 2.4.3 Program Reports Providing Additional Quantitative Analysis Benefit (Not required, but would provide additional program insight)

- ✔ Amount redeemed on fruits vs. vegetables.
- ✔ Automatic reporting of dollar amount spent and token transaction count for retailer submission to funding organization for reimbursement.
- ✔ Total number of redemption transactions for a given period. (Daily, monthly, weekly, quarterly, and yearly with historical information retained for future use).
- ✔ Number of unique redemptions such as a unique token redeemed vs. total number of redemptions. Reportable by day, week, month, quarter, and year with historical information retained for future use.



- ✔ Forfeiture reporting for DEV tokens. Reporting on value not used during transaction (e.g., a shopper using a \$10 DEV token and only purchases/spends \$9 on eligible PPR products). Reporting would reveal the amount of DEV tokens tendered, vs. amount of token redeemed and revealing a forfeiture value for project funders.
- ✔ Item level reporting of individual eligible PPR items sold by dollar amount and weight for scale items.
- ✔ Retailer location where DEV redemption occurred.
- ✔ Cashier level reporting for value of items purchased using tokens.
- ✔ Reporting to compare weekly, monthly, quarterly, or annual impact of items purchased using PPR tokens comparable to previous reporting periods.
- ✔ If electronically possible, reporting of count and value of returns.