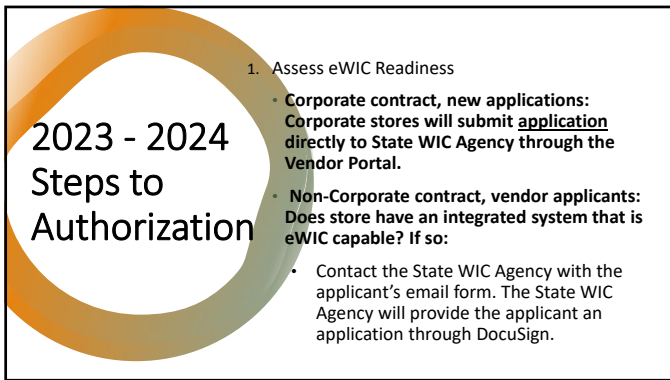
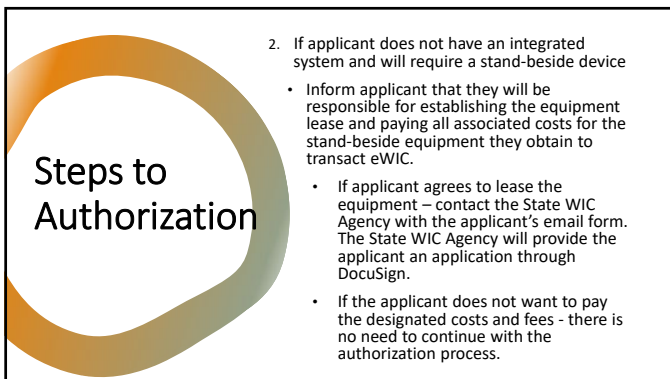





1



2




3



Steps to Authorization continued

3. Orientation and review of module
 - New applicants are to be trained face-to-face
4. Completion of forms
 - Local WIC Agency should thoroughly review and have corrections made, as necessary, prior to entering information into Crossroads or signing documents in DocuSign
 - If corrections are needed:
 - A second DocuSign packet will be sent
 - If **second** DocuSign packet needs corrections:
 - Print the complete packet from DocuSign
 - Have the vendor applicant correct the mistake(s) and initial
 - The process through DocuSign ends here if errors were made in the second packet
 - Mail or email the complete packet with the monitoring report and verification of attendance form to the State WIC Agency


4



Steps to Authorization continued

5. Entry of information from forms into Crossroads by Local Agency
6. Pre-Authorization Monitoring
 - Monitoring Reports and Verification of Attendance (VOA) forms, will be mailed to the State WIC Agency by Local WIC Agency
 - When Local Agency staff receive the application in DocuSign, this is the signal to complete pre-authorization monitoring


5



Steps to Authorization continued

7. Forms will be sent to State WIC Agency for processing via DocuSign.
 - Vendor Agreement - ending date 9/30/2024 and *Terms of Vendor Agreement* will be provided in DocuSign.
 - Copies of all signed forms will be sent to all parties once all signatures, including State Agency staff have been captured.


6



Steps to Authorization continued

8. Once the State WIC Agency has determined that the vendor applicant will be authorized, they will contact FIS.
 - FIS will perform a full analysis of the vendor applicant's cash register system, including the potential need for stand-beside equipment and get the necessary deposit for equipment and lease agreement in place.


7



Steps to Authorization continued

9. State WIC Agency staff will complete L3 certification testing once stand-beside equipment has been received by the vendor and the vendor has been trained
10. State WIC Agency staff will complete L3 certification testing for vendor applicants with an integrated cash register system, once the cash register system has been approved by FIS

8



Steps to Authorization continued

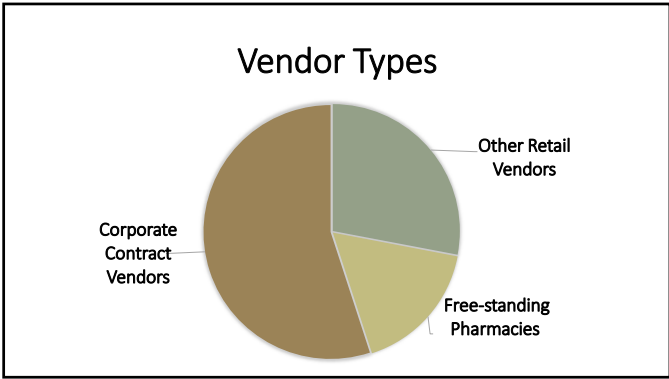
11. Completion of Orientation
 - If vendor is authorized to become a NC WIC vendor, the State WIC Agency will provide the Local WIC Agency the vendor ID
 - Local WIC Agency staff should provide vendor with enough NC WIC Vendor Transaction guides for every cash register.
 - Review transaction procedures

***DO NOT INFORM VENDOR THAT THEY ARE AUTHORIZED UNTIL YOU HAVE RECEIVED CORRESPONDENCE FROM THE STATE WIC AGENCY.**

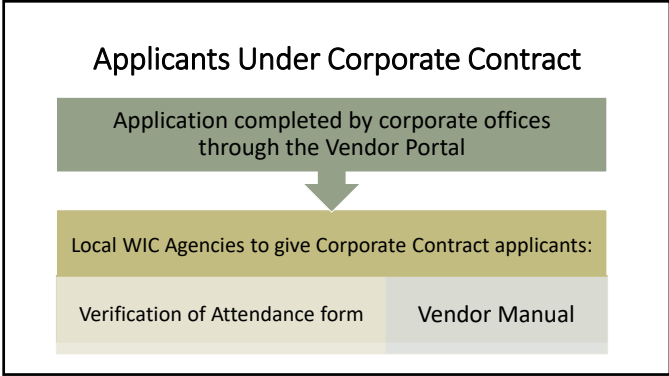
9

FORMS
Who Gets What?

10



11



12

Retail Vendor Applicants (Non-Corporate Contract)

<p>Local Agency staff provide:</p> <ol style="list-style-type: none"> 1. Email Verification form 2. Verification of Attendance form 3. Vendor Manual 4. NC WIC Vendor Transaction Guides 	<p>Document's applicants receive through DocuSign:</p> <ol style="list-style-type: none"> 1. Vendor Agreement + Terms of Agreement 2. Vendor Application 3. Price List 4. Above Fifty-Percent Vendor Self Declaration Form 5. Any relevant memos
---	--

13

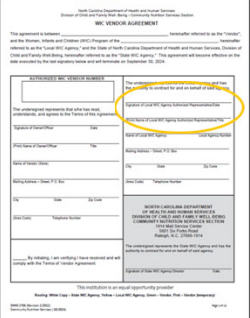
Pharmacies **NOT** Under Corporate Contract

<p>Local Agency staff provide:</p> <ol style="list-style-type: none"> 1. Email verification Form 2. Verification of Attendance Form 3. Vendor Manual 4. NC WIC Vendor Transaction Guides 	<p>Document's applicants receive through DocuSign:</p> <ol style="list-style-type: none"> 1. Vendor Agreement + Terms of Agreement for Free-standing Pharmacies 2. Vendor Application 3. WIC Price List for Free-Standing Pharmacies 4. Cost Containment Exemption Form 5. Any Relevant Memos
---	---

14

Vendor Agreement

- Please note, the Local Agency representative signing Vendor Agreements should only be the Health Director, WIC Director, or Nutrition Director when there is not a specific WIC Director.
- **Vendor Coordinators or Processing Assistants cannot sign the Vendor Agreement.**



15

The screenshot shows a portion of a WIC Vendor Application form. A yellow circle highlights the signature area, which includes fields for the applicant's name, title, and agency. The form contains various sections, including a declaration of accuracy and a section for the applicant's signature.

Page 5 Signature

After reviewing the application for completeness and entering the application into Crossroads, Vendor Coordinators or Processing Assistants will sign page 5.

16

WIC Vendor Application Checklist

- Vendor Coordinators may provide vendor applicants with the WIC Vendor Application Checklist.
- This checklist may help lessen errors made by applicants.

The checklist includes items such as: 1. Application form completed and signed, 2. Application fee paid, 3. Application fee receipt attached, 4. Application fee receipt date, 5. Application fee receipt number, 6. Application fee receipt amount, 7. Application fee receipt date, 8. Application fee receipt number, 9. Application fee receipt amount, 10. Application fee receipt date, 11. Application fee receipt number, 12. Application fee receipt amount, 13. Application fee receipt date, 14. Application fee receipt number, 15. Application fee receipt amount, 16. Application fee receipt date, 17. Application fee receipt number, 18. Application fee receipt amount, 19. Application fee receipt date, 20. Application fee receipt number, 21. Application fee receipt amount, 22. Application fee receipt date, 23. Application fee receipt number, 24. Application fee receipt amount, 25. Application fee receipt date, 26. Application fee receipt number, 27. Application fee receipt amount, 28. Application fee receipt date, 29. Application fee receipt number, 30. Application fee receipt amount, 31. Application fee receipt date, 32. Application fee receipt number, 33. Application fee receipt amount, 34. Application fee receipt date, 35. Application fee receipt number, 36. Application fee receipt amount, 37. Application fee receipt date, 38. Application fee receipt number, 39. Application fee receipt amount, 40. Application fee receipt date, 41. Application fee receipt number, 42. Application fee receipt amount, 43. Application fee receipt date, 44. Application fee receipt number, 45. Application fee receipt amount, 46. Application fee receipt date, 47. Application fee receipt number, 48. Application fee receipt amount, 49. Application fee receipt date, 50. Application fee receipt number, 51. Application fee receipt amount, 52. Application fee receipt date, 53. Application fee receipt number, 54. Application fee receipt amount, 55. Application fee receipt date, 56. Application fee receipt number, 57. Application fee receipt amount, 58. Application fee receipt date, 59. Application fee receipt number, 60. Application fee receipt amount, 61. Application fee receipt date, 62. Application fee receipt number, 63. Application fee receipt amount, 64. Application fee receipt date, 65. Application fee receipt number, 66. Application fee receipt amount, 67. Application fee receipt date, 68. Application fee receipt number, 69. Application fee receipt amount, 70. Application fee receipt date, 71. Application fee receipt number, 72. Application fee receipt amount, 73. Application fee receipt date, 74. Application fee receipt number, 75. Application fee receipt amount, 76. Application fee receipt date, 77. Application fee receipt number, 78. Application fee receipt amount, 79. Application fee receipt date, 80. Application fee receipt number, 81. Application fee receipt amount, 82. Application fee receipt date, 83. Application fee receipt number, 84. Application fee receipt amount, 85. Application fee receipt date, 86. Application fee receipt number, 87. Application fee receipt amount, 88. Application fee receipt date, 89. Application fee receipt number, 90. Application fee receipt amount, 91. Application fee receipt date, 92. Application fee receipt number, 93. Application fee receipt amount, 94. Application fee receipt date, 95. Application fee receipt number, 96. Application fee receipt amount, 97. Application fee receipt date, 98. Application fee receipt number, 99. Application fee receipt amount, 100. Application fee receipt date.


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ID Requirement

The State WIC Agency requires that vendor applicants submit a copy of their driver's license or state issued ID.

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Vendor Transaction Guide



Vendor Transaction Guide February 2023

Using This Guide

This guide is intended to provide a comprehensive overview of the Vendor Transaction Guide. It is designed to be used as a reference tool for all staff involved in the vendor transaction process. The guide is organized into several sections, each covering a different aspect of the process. The sections are as follows:

Key Definitions and Acronyms	ix	Bond	8
Key Definitions and Acronyms (continued)	ix	Invoice	8
Request for Proposal	10	Invoice, Budget Order	9
Single Contract Order	10	Invoice	10
Contract Order	10	Invoice	10
Transaction Process/Requirements	11	Invoice	10
Transaction Process/Requirements (continued)	11	Invoice	10
Additional Fees, Discounts and Breaks	12	Invoice	10
Contract Order Identification	12	Invoice	10
Contract Order Identification (continued)	12	Invoice	10
File and Paperwork	13	Invoice	10
File and Paperwork (continued)	13	Invoice	10
Key Terms	14	Invoice	10
Key Terms (continued)	14	Invoice	10
Request for Proposal	15	Invoice	10

19

Entering Applications into Crossroads


20

Stop!




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Adding a New Vendor Application

- “Search” for applicant in Crossroads for previous authorization or pending status
- If no results found:
 - Click “New Vendor Application” from Vendor Search screen
 - Enter the initial New Vendor Application screen that pops up
 - Complete all required  items and enter the SNAP ID.
 - Click “Save”

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Completing Application

- Vendor Information screen will pop-up
Complete All Required  Items
Select Ownership Type
- If Corporation is selected as Ownership Type, **choose** the Corporate Parent from the drop down.
 - If the Corporate Parent is not listed in the dropdown, it must be added manually. Only State staff able to add.
 - Local Agency staff can add the “Dummy” Corporation name “Acme General Test” and then the state staff will add the appropriate corporation’s name.

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Completing Application continued

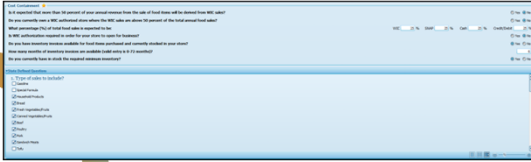
- When entering the Primary Source of Formula, choose one State-approved source from the list in the drop down.
- **Do not add a source to the list in the drop down. All State-approved sources are included.**
- Reviewers of applications should verify that the sources the vendor lists are all State-approved.

24

Answer All Required ★ Sections

Cost Containment:

- This is a **required** section of the NC WIC Vendor Application. All questions must be answered for the application to be processed.
- Percentage of Total Food Sales must add up to 100%, decimals cannot be used.



25

Answer All Required ★ Sections

State Defined Questions:

- This is a **required** section of the NC WIC Vendor Application. All questions must be answered for the application to be processed.
- Select **Save** once all **required** fields have been completed.



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Remaining Authorization Steps

Authorization Step	Completed By	Completed On	Modified By	Modified On
Application Received	Cross roadsads	03/26/2019	Cross roadsads	03/26/2019
Signed Agreement			Cross roadsads	03/26/2019
Determine Peer Group			Cross roadsads	03/26/2019
Monitoring Visit			Cross roadsads	03/26/2019
Training Completed			Cross roadsads	03/26/2019
Inventory Survey			Cross roadsads	03/26/2019
Infant Formula Supplier Verified			Cross roadsads	03/26/2019
Issue Stamp			Cross roadsads	03/26/2019
SOPs Vendor Analysis			Cross roadsads	03/26/2019
Geographic Zone	Cross roadsads	03/26/2019	Cross roadsads	03/26/2019
SNAP Authorizations Verified Through STARS			Cross roadsads	03/26/2019
Previously Authorized Vendor Information			Cross roadsads	03/26/2019

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Local WIC Agency's Responsibilities



After signing the application documents and entering the applicant information in Crossroads, mail or email the training **Verification of Attendance and Monitoring Report** to the State WIC Agency. The Vendor Agreement, Application, Price List and Above 50% Self-declaration form/Cost Containment Exemption form will be received by the State WIC Agency in DocuSign after Local WIC Agency staff has signed.

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Local WIC Agency's Responsibilities continued



After State WIC Agency Approval and L3 Certification is Completed:

Provide Vendor ID to vendor

Ensure the vendor has received copies of the WIC Vendor Agreement, Application, Price List, Above 50% Self-declaration form or Cost Containment Exemption form via email.

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Local WIC Agency's Responsibilities continued

WIC Shelf Tags

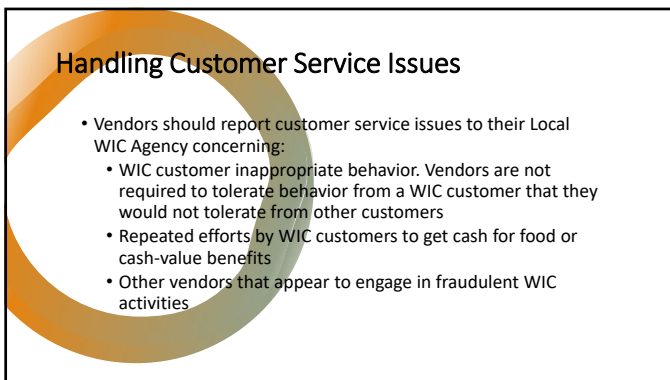
- Identify WIC-approved foods
 - Decreases confusion for WIC customers when selecting food items
- For vendors that do not have shelf tags that include WIC information already



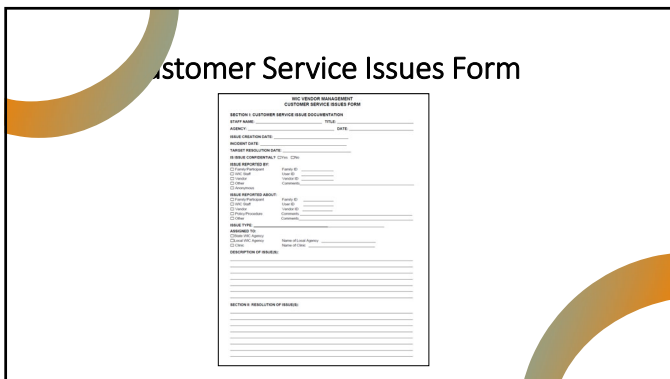
30



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Local Agency Vendor Triage Form



Purpose

- To help Local Agency staff ask the right questions when participants report an issue involving a vendor during an eWIC transaction
- Still continue to use the standard Customer Service Issues form for all non eWIC-related complaints or issues

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Local Agency Vendor Triage Form

NC-WIC Local Agency Vendor Triage Form

Vendor Name: _____
 Agency Name: _____
 Participant Name: _____

Participant Address: _____

NC-WIC Local Agency Vendor Triage Form

Reason for the participant complaint (check all that apply):

1. What was the problem? (check all that apply)

2. How long did the problem last? _____

3. How often did the problem occur? _____

4. How did you resolve the problem? _____

5. How did you resolve the problem? _____

NC-WIC Local Agency Vendor Triage Form

6. How did you resolve the problem? _____

7. How did you resolve the problem? _____

8. How did you resolve the problem? _____

9. How did you resolve the problem? _____

10. How did you resolve the problem? _____

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Local Agency Vendor Triage Form

- Fillable form available at: [Vendor Triage Form](#)
- Please scan and send the Local Agency Vendor Triage Form along with any copies of the receipts to the following email address: NCWICVendorQuestions@dhs.nc.gov
- This email address is checked daily, a Vendor Consultant will be in contact with you.

We strongly encourage Local Agency staff to keep a copy for their records.

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For Technical Assistance

- Heather Dingess – (919) 707-5738
Heather.Todaro@dhhs.nc.gov
- Jasmine Martin – (919) 707-5748
Jasmine.Martin@dhhs.nc.gov
- Lokia J. Sims – (919) 707-5747
Lokia.Jones@dhhs.nc.gov

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QUESTIONS?
COMMENTS?
CONCERNS?

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Assurance of Civil Rights Compliance

The vendor hereby agrees that it will comply with Title VI of the Civil Rights Act of 1964 (42 U.S.C. 2000f et seq.); Title IX of the Education Amendments of 1972 (20 U.S.C. 1681 et seq.); Section 504 of the Rehabilitation Act of 1973 (29 U.S.C. 794); the Age Discrimination Act of 1975 (42 U.S.C. 6101 et seq.); Title II and Title III of the Americans with Disabilities Act (ADA) of 1990, as amended by the ADA Amendment Act of 2008 (42 U.S.C. 12131-12189) and as implemented by Department of Justice regulations at 28 CFR Parts 35 and 36; Executive Order 13166, "Improving Access to Services for Persons with Limited English Proficiency" (August 11, 2000); all provisions required by the implementing regulations of the U.S. Department of Agriculture (7 CFR Part 15 et seq.); and FNS directives and guidelines to the effect that no person shall, on the ground of race, color, national origin, age, sex (including gender identity and sexual orientation), or disability, be excluded from participation in, be denied the benefits of, or otherwise be subjected to discrimination under any program or activity for which the agency receives Federal financial assistance from FNS; and hereby gives assurance that it will immediately take measures necessary to effectuate this agreement.

This assurance is given in consideration of and for the purpose of obtaining any and all Federal financial assistance, grants, and loans of Federal funds, reimbursable expenditures, grant, or donation of Federal property and interest in property, the detail of Federal personnel, the sale and lease of, and the permission to use Federal property or interest in such property or the furnishing of services without consideration or at a nominal consideration, or at a consideration that is reduced for the purpose of assisting the recipient, or in recognition of the public interest to be served by such sale, lease, or furnishing of services to the recipient, or any improvements made with Federal financial assistance extended to the Program applicant by USDA. This includes any Federal agreement, arrangement, or other contract that has as one of its purposes the provision of cash assistance for the purchase of food, and cash assistance for purchase or rental of food service equipment or any other financial assistance extended in reliance on the representations and agreements made in this assurance.

This assurance is binding on the vendor, its successors, transferees, and assignees as long as it receives assistance or retains possession of any assistance from the Department. The person or persons whose signatures appear below are authorized to sign this assurance on the behalf of the vendor.

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USDA NONDISCRIMINATION STATEMENT

In accordance with federal civil rights law and U.S. Department of Agriculture (USDA) civil rights regulations and policies, this institution is prohibited from discriminating on the basis of race, color, national origin, sex (including gender identity and sexual orientation), disability, age, or reprisal or retaliation for prior civil rights activity.

Program information may be made available in languages other than English. Persons with disabilities who require alternative means of communication to obtain program information (e.g., Braille, large print, audiotape, American Sign Language), should contact the responsible state or local agency that administers the program or USDA's TARGET Center at (202) 720-2600 (voice and TTY) or contact USDA through the Federal Relay Service at (800) 877-8339.

To file a program discrimination complaint, a Complainant should complete a Form AD-3027, USDA Program Discrimination Complaint Form which can be obtained online at <https://www.usda.gov/nondiscrimination/Documental/AD-3027-0000-908-11/08-17/2019.html> from any USDA office, by calling (866) 632-9992, or by writing a letter addressed to USDA. The letter must contain the complainant's name, address, telephone number, and a written description of the alleged discriminatory action in sufficient detail to inform the Assistant Secretary for Civil Rights (ASCR) about the nature and date of an alleged civil rights violation. The completed AD-3027 form or letter must be submitted to USDA by:

1. **mail:** U.S. Department of Agriculture
Office of the Assistant Secretary for Civil Rights
1420 Independence Avenue, SW
Washington, D.C. 20250-8410;
2. **fax:** (833) 256-1665 or (202) 696-7442; or
3. **email:** program.intake@usda.gov

This institution is an equal opportunity provider.
