

## Vendor Training

- I. Education/training is provided by either the State or local WIC vendor management staff to vendors through state created vendor training modules, manuals, videos, computer-based training, and on-site presentations.
- II. Vendor training is conducted for the following reasons:
  - a. Vendor is newly authorized (initial training),
  - b. Annual vendor training,
  - c. Interactive training every three (3) years,
  - d. Any non-compliance with the Utah WIC Vendor Agreement (vendor has accumulated ten (10) or more violation points),
  - e. Vendor requests training.
  - f. As otherwise designated by the State Agency.
- III. Local agency vendor coordinators may be assigned by the State Agency to conduct initial training at new vendors and interactive training for existing authorized vendors.
- IV. The State Agency will conduct all annual training and training for non-compliance with the vendor agreement.
- V. If the vendor is being seen for a monitoring on-site visit, interactive training may be scheduled during the same visit if the vendor also requires training.
- VI. Vendor training is to be conducted by either state staff or local vendor coordinators who have completed the Vendor Management Module for local vendor coordinators within the current fiscal year.
- VII. Initial Training (new vendor) procedures:
  - a. New vendor training is to be provided to the store manager, store trainer and the bookkeeper. Other personnel, such as cashiers and other personnel who conduct WIC transactions should be invited to attend. It is important to offer to train the rest of the store personnel before you begin the training. If other personnel are not planning to attend, you must stress to the manager their responsibility to train other store personnel in accordance with the Utah Vendor Agreement.
  - b. For initial (new vendor) on-site evaluation and training the WIC retail coordinator will use:

- i. Utah Vendor Video,
- ii. Interactive Training PowerPoint presentation,
- iii. Utah WIC Vendor Guide,
- iv. Checklist for Interactive Training Form,
- v. Attendance Record for Vendor Training,
- vi. Initial Evaluation Form for New WIC Vendors,
- vii. Vendor Inventory Requirement Verification Form,

- c. The following reference materials will be reviewed and left with the store:
  - i. Training Module for Cashiers,
  - ii. Vendor Manual,
  - iii. Manual for Bookkeeping and Cash Office Staff,
  - iv. Bookkeeper's Information Sheet,
  - v. Vendor memos from the current fiscal year.

VIII. Interactive Training procedures:

- a. The interactive training must be in an interactive format that includes a contemporaneous opportunity for questions and answers. Examples of acceptable vendor interactive training include on-site cashier/associate training or off-site classroom-style. Teleconferencing cannot be utilized to satisfy the Interactive training requirement without state approval. Generally, interactive training will be face-to-face.
- b. This training is required for all employees who handle WIC transactions including cashiers, bookkeeping staff and management/supervisory staff. At the sole discretion of the State, "train-the-trainer" style interactive training may be provided. (Train-the trainer is generally only permitted with state approval.)
- c. The local agency must coordinate the date, time, and location of the training with the vendor.
  - i. The local agency must accommodate the vendor's schedule when setting up this training. The local agency cannot require the store to have all employees attend the same training session. This means that the training may need to include a second training session on the same or different day depending on the needs of the vendor. In addition, the vendor will be allowed to train those employees that were ill, on vacation or could not be available for the on-site training. The local agency vendor coordinator must provide vendors with at least one alternative date on which to attend interactive training at a mutually agreeable time.
  - ii. The local agency vendor coordinator should set up a training appointment with the store owner or manager.

- iii. Let the manager know the training will last approximately 60 minutes.
  - iv. Try to have the training take place in a quiet area where there will be few interruptions.
  - v. A screen, whiteboard, or white wall will be needed when the local vendor coordinator uses a projector to show the video and the PowerPoint presentation. Use of a laptop and projector is required if the location can accommodate it. This equipment has been provided to each local agency.
- d. The standard training presentation for the Utah WIC Program will be the state-created Interactive Training PowerPoint Presentation. This will be used in order to provide a consistent message statewide.
- e. The Attendance Record for Vendor Training and the Interactive Training Checklist will be utilized.
- f. When visiting the store take the appropriate forms and training materials as well as additional vendor guides, business reply cards and window stickers.
- g. The local vendor coordinator will use the following materials and forms to provide the training:
- i. Utah Vendor Video,
  - ii. Interactive Training PowerPoint presentation,
  - iii. WIC Program Shopping Guide,
  - iv. Attendance Record for Vendor Training,
  - v. Checklist for Interactive Training,
- h. The following reference materials may be reviewed with the vendor and left with the store if the store does not already have copies:
- i. WIC Vendor Manual,
  - ii. Training Module for Cashiers,
  - iii. Manual for Bookkeeping and Cash Office Staff,
  - iv. Bookkeeper's Information Sheet,
  - v. Vendor memos from the current fiscal year.
- IX. For any other type of training visit, the retail representative should use:
- a. Vendor Training Report
  - b. Attendance Record for Vendor Training
  - c. Appropriate training materials for the specific training being provided.

- X. When providing training to vendors the following subjects should be discussed as appropriate. (Remember, all items must be covered on initial evaluation and Interactive training sessions):
  - a. The purpose of the WIC Program;
  - b. The supplemental foods authorized by the State agency;
  - c. The minimum varieties and quantities of authorized supplemental foods that must be stocked by the vendors;
  - d. The requirement that vendors obtain infant formula only from sources included on a list provided by the State Agency;
  - e. The procedures for transacting food instruments;
  - f. The State Agency violation points and vendor sanction system;
  - g. The vendor complaint process;
  - h. The claims procedures;
  - i. The State Agency's policies and procedures regarding the use of incentive items;
  - j. Any changes to program requirements since the last training.
- XI. The vendor is responsible to inform and train cashiers and other staff on program requirements. The vendor is accountable to ensure all employees who handle WIC transactions are trained on WIC redemption procedures once the initial pre-authorization training visit has been accomplished.
- XII. The vendor/corporate offices should use Utah WIC training materials supplied by the Utah State Agency. The vendor or corporate offices are not permitted to edit or change any WIC training material supplied by the State Agency.
- XIII. The WIC Program has no legal obligation to provide vendor training materials in multiple languages. The WIC Program holds the retailer responsible for providing or bringing an interpreter for on-site visits, communication or questions with the State WIC office or Local WIC Agency, initial or renewal of agreement applications; required training sessions, or other meetings, as necessary.
- XIV. Documentation from vendor training will be scanned and uploaded into SharePoint under Vendor Management.