



# VENDOR CASHIER TRAINING

This companion manual includes the text for all audio narration in the Vendor Cashier Training Curriculum.

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## INTRODUCTION

Welcome to cashier training for WIC authorized vendors. In this course, you'll learn what WIC is, how WIC participants qualify for the program, what the Vendor's Role is and the four major components of WIC. We'll look at a complete WIC customer transaction so you'll understand the Food List, how to use Food Instruments, and all about WIC ID Folders and Proxy Certification forms. Let's join Eric, an experienced WIC cashier who's in the process of training Vanessa, a new cashier.

## WHAT IS WIC?

**Eric:** Good morning, Vanessa. Thanks for being here so bright and early.

**Vanessa:** No problem. I need to know more about the WIC program. While Linda was training me on the register, we had lots of WIC participants come through. I'm really not sure what it's all about.

**Eric:** Well that's why I'm here. By the time you leave today, you'll have a much better understanding of the program. First off, what do you know about WIC?

**Vanessa:** I know it has something to do with women and children.

**Eric:** That's correct. Women, Infants and Children or WIC as we know it, is a special program funded by the United States Department of Agriculture that provides nutrition education, breastfeeding education and promotion, referrals to health and social services, and supplemental foods for income-eligible pregnant, breastfeeding and postpartum women, as well as infants and children up to the age of five. The WIC Program was established as a pilot program in 1972. It became permanent in 1974. That's when Arizona established its WIC program offered through the Arizona Department of Health Services.

**Vanessa:** So you just have to be income eligible to qualify for the WIC program?

**Eric:** Well, actually there are a few more requirements. Let's go into a little more detail.

## WIC PARTICIPANT GUIDELINES

**Eric:** The WIC Program is available to eligible participants without regards to race, color, national origin, sex, age or disability. To participate in the WIC program, you have to meet certain requirements. The program is available to:

- A woman who is pregnant, just had a baby or is breastfeeding,
- From birth up to five years old,
- The family has to meet certain income requirements (both parents can work, but their income can't go over the required amount), and they also must meet residency requirements.

The mother or the children must have an identified nutrition or health risk which may include, anemia (meaning low iron) or they might be underweight or overweight, expecting multiple births, have a history of problem pregnancies or inappropriate nutrition practices that fail to meet dietary guidelines.

**Vanessa:** So once someone qualifies, what kind of services does WIC provide?

**Eric:** You're one step ahead of me. It's great you want to learn this! WIC focuses on four major areas to enhance the health of mothers and children. To learn more about these areas click on the services tabs across the screen.

**Eric:** Nutrition Education – The WIC staff teaches WIC participants proper nutrition and how they can meet their nutrition goals.

**Eric:** Breast-feeding Promotion and Education – WIC encourages and provides support to mothers who choose to breast-feed their infants. Pregnant women are given information on the benefits of breast-feeding their infants.

**Eric:** Supplemental Food – WIC provides supplemental foods that are carefully selected to meet nutritional requirements. Participants receive food instruments that they take to an authorized WIC Vendor to purchase WIC approved foods.

**Eric:** Referrals – The WIC staff can assist participants by making referrals to medical services, immunization services, substance abuse counseling and treatment, Child Support Services, the Arizona Health Care Cost Containment System (also known as AHCCCS), Temporary Assistance for Needy Families (or TANF) and the Supplemental Nutrition Assistance Program (SNAP).

WIC is an equal opportunity provider.

## WIC PROGRAMS IN ARIZONA

Let's take a minute to talk about the WIC program in Arizona. There are three WIC programs within Arizona boundaries; they include the Arizona WIC program that serves eligible participants in Arizona, the Inter Tribal Council of Arizona (ITCA) that serves eligible participants on Indian Reservations throughout Arizona and in metropolitan areas, and the Navajo Nation WIC Program that serves eligible participants on the Navajo Nation in the northeast part of Arizona, New Mexico, Colorado and Utah. The only program we're going to focus on today is the Arizona WIC program.

## THE VENDOR'S ROLE

**Vanessa:** It sounds like WIC helps a lot of people all over the state. I can't wait to get started!

**Eric:** I like your enthusiasm, but before we get to your role as a cashier we need to talk about the store's role in the process. A store that participates in WIC is called a 'vendor.' Vendors are vital to the success of WIC and an important member of the health care community. One way to think about it is that WIC vendors are like a pharmacy, filling prescriptions. WIC food instruments are like prescriptions for supplemental foods for WIC customers.

**Vanessa:** Okay, so the WIC customer comes in with these food instruments, and the store, or the vendor, takes them in exchange for food.

**Eric:** Exactly. This is a great way for you to learn by the way – let's use the example of Amber. Amber has completed her WIC shopping and is going to the register where she'll redeem her food instruments. So, we as vendors need to know which foods are authorized on the WIC program, how to redeem WIC food instruments, and which programs we're authorized to accept food instruments from. We also need to be sure to treat Amber and all WIC customers with the same courtesies as any other customer. WIC Customers can use any register except the cash only or self check out registers.

**Vanessa:** Wow that sounds like a lot for me to learn...Will I really get the hang of this?

**Eric:** It is a lot of information, but it's important for WIC vendors to understand WIC policies, procedures and regulations that are in the WIC Vendor Contract and Vendor Manual and the Federal Regulations for the program. If you have questions about these references just ask your store manager. One of those Federal Regulations requires that all vendors are trained.

## FOOD LIST

**Eric:** So, one of your major roles will be ensuring that the WIC customers get the appropriate foods that are listed on their food instrument. WIC *does* provide a food list to let you know which foods WIC customers can and cannot buy.

**Vanessa:** I'm so relieved there's a list! I thought I was going to have to memorize all the approved foods.

**Eric:** I guess you *could* do that - but we really don't expect it. WIC provides the Arizona WIC Programs' Food List as a reference tool for both you and WIC customers, like Amber. The participant version provides additional information to explain how to shop using food instruments. All the foods on the list meet nutritional requirements to provide vitamins, minerals and protein. It's important to remember there are no substitutions allowed for WIC foods.

## USING THE FOOD LIST

**Eric:** Now let's talk about the food list that you'll be using at the cash register. This is your main resource for knowing what our WIC customers can and cannot buy when using their food instruments. The Vendor's version of the food list features food category tabs so cashiers can easily find foods while checking out a customer. Let's take a few minutes to practice using the vendor food list. You'll have to read each question, locate the item using the vendor food list, and then answer if the item is WIC approved or not approved for purchase. Remember to click the 'Next Question' button to move on to the next question. So let's see how you do!

## WIC IDENTIFICATION

**Eric:** Now let's go through a transaction with Amber, so I can teach you how this all works when the customer checks-out.

**Vanessa:** Okay, I'm ready.

**Eric:** The first thing the WIC customer will do at check-out is present their WIC food instruments along with their WIC identification. There are two types of WIC identification, one is the WIC ID folder and the other is the proxy certification form. We'll start with the ID folder. Have you seen them before?

**Vanessa:** Yes! Lots of them while I was training with Linda. That was my first clue that I better learn more about this program!

**Eric:** Definitely. The WIC ID folder is what our customers use for identification at WIC clinics and during check-out here at our store. Every ID folder has a stamp from the authorized WIC clinic the customer visited. ID folders are only valid if the authorized clinic stamp is on it.

Here's an example of Amber's ID Folder. WIC participants - or someone they've authorized to use their WIC food instruments - have to sign the ID folder at their certification. The WIC participant can have one or two authorized persons to sign the ID folder. If there's only one person signing, the clinic worker stamps "VOID" on the second line.

If necessary, at a later time, a second authorized person can be added to the ID folder. In this case, you'll see an official WIC sticker covering the second signature line that was originally stamped "VOID". The sticker will have the signature of the second authorized person, the clinic worker's initials, and the date it was added.

NOTE: If the participant is an infant or child, the authorized representative will usually be the parent or guardian of the participant; so, the last names may or may not be the same.

## PROXY CERTIFICATION

**Eric:** There's one other kind of WIC identification you should know about. It's called 'the proxy certification form.'

**Vanessa:** Hmmm. Not familiar with that one.

**Eric:** Not a problem, I can teach you all about them right now. In this case, a proxy is someone who acts on the behalf of the WIC participant. So if the WIC participant needs a proxy, they can ask a friend or relative to pick up their food instruments at the clinic. The proxy can do the WIC shopping for the WIC customer or give the food instruments to them to use. Let me show you....you'll understand better.

The Proxy certification form is only valid for the dates that are printed on the form. Both the dates it's valid and the proxy signature are located on the form. If the WIC customer does not have an ID folder then the proxy form MUST be presented at check out, you need to make sure the signature on the form matches the signature on the food instrument.

The ID folder or proxy form is all we need to cash a WIC food instrument, so we should never ask for any other identification, like a driver's license, passport or telephone number. We also do not have to verify the participant identification number or name on the inside of the folder.

## SIMULATING A TRANSACTIONS PART 1

**Eric:** So, let's complete our trial run using the food instruments.

**Vanessa:** That would be really helpful. I always learn better when I can act something out.

**Eric:** Okay. Let's go through the steps you need to take to complete a transaction. Again, at the checkout, Amber is going to tell you she's using WIC food instruments and hands you her WIC ID folder and let's say, she has three food instruments. WIC customers can use more than one food instrument per visit; but they have to be handled as separate transactions.

There's lots of information on the food instrument. So, let's look closely at one of Amber's. They tell you all you need to know to complete the transaction.

You need to verify the food instruments are valid by checking the 'First Date to Use' and the 'Last Date to Use.' The food instruments can only be used on or within those dates not before or after. Due to clinic schedules, WIC participants or their authorized representatives may receive food instruments before the

first date to use. However, we are not allowed to cash the food instrument before the first date to use. The food instruments are valid until 11:59pm on the 'Last Date to Use.'

**Vanessa:** Good to know.

#### SIMULATING A TRANSACTION PART 2

**Eric:** Now you'll want to verify all items purchased are authorized using the Arizona WIC Programs' Food List.

**Vanessa:** Hey, I know what that is! We just talked about it!

**Eric:** Exactly right! And the types of items eligible for purchase are printed right on WIC food instruments. Customers should have their purchases separated out on the belt by what's listed on each WIC food instrument. If they don't you can help them to separate their items.

#### SIMULATING A TRANSACTION PART 3

**Eric:** Now, write today's date on the food instrument. If you make a mistake, it can be corrected once; you will cross it out with a single line, write in the correct date and initial it.

**Vanessa:** That's easy to remember!

**Eric:** It's now time to ring up Amber's purchases.

**Vanessa:** Here we go!

**Eric:** After you have the total, write the dollar amount on the food instrument excluding sales tax. You'll write this in the box that has the dollar sign. If you make a mistake, it also can be corrected once and you will cross it out with one single line write the correct amount in the dollar correction only box, and initial in the cashier initial box to verify the change. For any correction, never scribble out an amount, trace over numbers or use correction fluid.

Just remember to ONLY use the method I described to make a change. It's very, very important. Also remember, that the dollar amount of the food instrument must equal the actual purchase amount of the items listed and does not include sales tax.

#### SIMULATING A TRANSACTION PART 4

**Eric:** Now, you'll give the food instrument to Amber to sign. The signature at the store must occur at the store in front of you, the cashier, at the end of the transaction.

**Vanessa:** Her signature on the food instrument needs to match the signature on the ID folder, right? I saw Linda doing this.

**Eric:** Yes. It's your responsibility to verify the ID of the WIC customer by matching one of the authorized signatures from their WIC identification to the signature on the food instrument.

**Vanessa:** Suppose it looks like the signature, but not exactly.

**Eric:** The signature at the store doesn't need to be a carbon copy of the signature on the WIC identification. It must be the same first and last names (in that order) and have the same characteristics as the signature on their WIC identification.

**Vanessa:** What if the signatures don't match?

**Eric:** If the signatures don't match, the customer may re-sign it. There are two occasions when a WIC customer may resign. The first is when the signatures don't match and the second is when the WIC customer gives you a food instrument that is already signed. You will draw a single line through the signature and have the customer re-sign inside the signature box (if it will fit) or to the left of the signature box. A customer can only re-sign once. If the food instrument is already signed, the customer will have to re-sign it when the transaction is complete. Remember, when a customer re-signs a food instrument, it must be the same name of the person who originally signed it. Even if the person who signed it the second time is on the ID folder or proxy form. Whoever signed it the first time must sign it the second time. If the signatures don't match, they should be referred back to the WIC clinic for assistance.

**Vanessa:** Alrighty. About done with our check-out?

**Eric:** Not quite, – now you need to make sure WIC is either printed or hand-written on the top of the receipt and hand it to the customer.

One important thing to remember is that WIC food instruments are printed from a computer at the clinic – they're NEVER hand written.

### "X" SIGNATURE

**Eric:** Oh and there's one special circumstance I'd like to talk about. There are some customers that may have trouble signing their name. In those cases, they can use an "X" as their signature. Participants, authorized representatives or proxies may sign using "x" if they cannot write their name. This is how it works; the clinic staff will watch the participant place an "x" on their WIC ID folder. The clinic staff will verify the individual's mark and then write the name of the participant, authorized representative or proxy, then sign their own name. The clinic staff will instruct the individual to repeat the process at the store. You will witness the customer place an "X" on the food instrument, and then you will write "for" the customer's name "by" then sign your name.

### USING CASH VALUE FOOD INSTRUMENTS

**Eric:** Now let's take a look a little more closely at the Cash Value Food Instrument because it's handled a little differently. Do you remember what it is used for?

**Vanessa:** Hmmm... fruits and vegetables?

**Eric:** As you can see the two are very similar. The biggest difference is in the description section that gives a maximum dollar amount that WIC customers can spend on fruits and vegetables. WIC customers are allowed to pay the difference between the actual cost and the amount printed if they choose to.

**Vanessa:** Example please....

**Eric:** For example, if the fruits and vegetables come to \$7.30 and the cash value food instrument is for \$6.00, the customer can pay the \$1.30 using another form of payment or they can put some of the items back. This will determine the amount you write on this cash value food instrument. If the customer chooses to pay the difference with another form of payment, you write \$6.00 on the cash value instrument and collect the rest of the payment – however they want to pay it. If they choose to return some of the fruits and vegetables, let's say they remove an amount equal to \$1.50, you would write \$5.80 ( $\$7.30 - \$1.50 = \$5.80$ ) as the actual cost on the cash value food instrument.

**Vanessa:** I get that. Is that all I need to remember?

**Eric:** Not quite

### COMBINING CASH VALUE FOOD INSTRUMENTS

**Eric:** WIC Customers can use more than one cash value food instrument for their purchases in one transaction. You'll tender (or process) each check individually.

**Vanessa:** How so?

**Eric:** The process is pretty similar, when redeeming more than one cash value food instrument; you will process each one individually. Start with the cash value food instrument with the highest amount. You will write in the date, ring up the fruits and vegetables, write the maximum amount on the cash value food instrument, and have the customer sign it, verify their signature and tender the food instrument. You will repeat the process for each cash value food instrument that is being used.

**Vanessa:** Can you give me an example of this one? I think I know what you mean...

**Eric:** Sure, for example, if the WIC customer has 3 cash value food instruments, 2 valued at \$5.00 and one at \$6.00, which totals \$16.00. The combination of fresh, canned and frozen fruits and vegetables come to a total of \$20.20. If the customer chooses to use all three of their cash value food instruments, you will begin with the cash value food instrument with the highest amount, which is the \$6.00 cash value food instrument. You'll then move to the \$5.00 cash value food instruments processing each one individually. Since the total amount of all three cash value food instruments which is \$16.00 will not cover the total which is \$20.20, the customer will need to decide either to pay the difference with another form of payment, or put some of the items back.

**Vanessa:** Got it. But how do I process the transaction if the customer puts something back?

**Eric:** Good question, I was just getting ready to tell you – you do catch on quick!



## COMBINING CASH VALUE FOOD INSTRUMENTS CONTINUED

**Eric:** The customer's decision will determine what amount gets written on the last cash value food instrument. If the customer decides to put some of their fruits and vegetables back, and the amount they returned is \$4.80 – you take your total \$20.20 and subtract the two cash value food instruments for \$11.00 - that leaves you with \$9.20 as a balance. You then subtract the \$4.80 for the food returned. That leave you with \$4.40 and you would write \$4.40 on the last cash value food instrument.

**Vanessa:** And what if the customer decides to pay the difference?

**Eric:** If the customer chooses to pay the difference with another form of payment, you would write \$5.00 on the cash value instrument and collect the rest of the payment. Remember, they can only use the cash value food instrument to buy fruits and vegetables.

## USE OF COUPONS AND SPECIALS

**Eric:** How I'm doing so far?

**Vanessa:** I'm pretty clear, but I still have a couple of questions. What if they have coupons or frequent shopper cards, can they use those?

**Eric:** Great question. They can definitely use coupons just as they would as part of a normal shopping experience. The only exception is participants can't use coupons when buying infant formula. In general, WIC encourages their participants to take advantage of coupons, specials and store discount cards with their WIC purchases. However, Above 50% Vendors are excluded from accepting or taking coupons, giving free items or incentive items or other special promotions. Your supervisor will let you know if the store is an Above 50% Vendor.

**Vanessa:** What about something like our in-store promotions?

**Eric:** They can also use in-store promotions, manufacturer promotions (like free additional ounces) and they can even use buy-one-get-one-free items as long as the first item is WIC approved. They can get the free item even if it is not an authorized WIC food. Remember, any free item or 'free additional ounces' doesn't count against the maximum on the food instrument.

When they use coupons or discounts, it shows up as a deduction on the receipt, just like a regular purchase using coupons. It's important to remember that even though WIC customers can use coupons, they can't get cash back for the transaction.

## PRINTED QUANTITIES OF INFANT FORMULA

**Eric:** When it comes to purchasing a number of items, WIC customers are able to purchase less than the amount that is printed on the food instruments. The exception to that is infant formula. WIC Customers **must** purchase the exact amount of infant formula printed on food instruments. In other words, if it says 4 cans of infant formula, they must get all 4 cans – not 3 cans or 5 cans.

**Vanessa:** What if the food instrument says, "4 cans of infant formula" and there are only 3 cans left on the shelf?

**Eric:** Stores are required to have a certain amount of infant formula in stock at all times. If there are not enough cans on the shelf, they may be in a store room or somewhere else. Just call for assistance or ask someone to check the store's stock for you. Unfortunately, if the store is out of any WIC foods, the customer will have to visit another WIC vendor; we don't issue rain checks for food instruments.

## STEPS FOR MAKING A TRANSACTION

**Eric:** Let's do a quick review of our transaction with Amber.

1. First, ask the WIC customer for their ID folder. If they don't have one, ask if they have a proxy form.
2. Make sure that the date on the food instrument is valid falling on or between the "First Date to Use" and the "Last Date to Use". Don't accept post-dated or expired food instruments. Food instruments are valid for approximately 30 days from the "First Date to Use".
3. Look at the food instrument and the WIC food list to make sure your customer is buying the correct brands, sizes and types of WIC foods. WIC customers cannot buy more than the quantity on the food instrument, but they can buy less. The exception is infant formula, they **must** buy the exact amount specified. Remember – there are no substitutions, refunds or rain checks on WIC foods.
4. Enter the "Date of Use" on the food instrument. If you make a mistake on the date, draw one line through the incorrect date, then write the correct date in and your initials.
5. WIC Customers can use coupons, specials and store discount cards when they're buying WIC foods. WIC customers CANNOT use coupons to buy baby formula. Discounts need to be deducted from the total at the time of purchase and no cash should be exchanged for the food instrument.
6. Enter the total purchase amount in the 'actual dollar amount' box.
7. If you make a mistake on the purchase amount, you need to correct it by drawing a single line through the incorrect amount. You then write the correct amount in the 'dollar correction box' and then put your initials in the 'cashier initials box.'
8. You must watch the customer sign the food instrument. Then you have to verify the signature on the food instrument matches one of the signatures on the ID folder or proxy certification form. If the signatures don't match, you can have the WIC customer re-sign the food instrument. To have the customer re-sign, you will draw one line through the original signature, then have the WIC customer re-sign the second time either inside the signature box, if it will fit, or to the left of the box. Match the signature to one of the signatures on the ID folder or proxy form. If it matches you can accept it. Remember, both the original signature and the re-signed signature must be the same name.
9. Next, give the WIC customer a cash register receipt for each WIC purchase. Just so you're aware, the receipt **MUST** show:
  - Name of the store
  - Date of purchase
  - Quantities purchased
  - Total of purchase

**Eric:** Finally, 'WIC' has to appear on the receipt. It can be hand written or printed by the cash register.

## CUSTOMER SERVICE

**Eric:** I just want to mention something about customer service here. Our WIC customers are every bit as important as any other and deserve the same respect as all customers. Yes, sometimes their transactions may take a few moments longer, but with practice you'll be able to take care of your WIC customers efficiently and effectively.

**Vanessa:** I never would have thought to treat our WIC customers differently! A lot of my friends have used WIC. It was a great help when they needed it most. It's great to finally learn more about the program and just how helpful it was to them!

**Eric:** That's great to hear, Vanessa.

**Vanessa:** Thanks!

**Eric:** If someone has a complaint about our store and how they were treated as a WIC customer, please make sure they talk to one of our managers. Our manager can give them a telephone number to call for complaints.



## COMMON VENDOR PROBLEMS WITH CUSTOMERS

**Eric:** We'd like to think after training everything always goes smoothly for both the vendors and customers, but there are some issues that come up frequently that you need to be aware of as a cashier.

**Vanessa:** This sounds like it would be very helpful.

**Eric:** One of the most common mistakes customers may make is selecting the wrong foods. The biggest culprits are the refrigerated juice and milk. With the refrigerated juice, just remember to always make sure it's the approved 64 oz. container and not the 59 oz. container. When it comes to milk, it can be a little more complicated. WIC customers can only purchase the lowest cost brand of milk in the type and size specified on the food instrument - I have a handy chart here, let's take a look. Go ahead and click on the 'Link' button to take a look.

**Vanessa:** Okay that seems clear. What other problems do they have?

**Eric:** Sometimes there's confusion of what foods are allowed. WIC customers may request an override of non-approved items because they purchased them at another store. Simply explain that the food list does not allow that item, and offer to replace the item with an authorized one from the food list.

And one of our most significant problems is participants forgetting to sign their food instrument. If they don't sign, it becomes invalid and the Vendor can't be reimbursed.

**Vanessa:** But I thought checking for the signature was one of the steps?

**Eric:** It is, but sometimes we get busy or distracted and both customers and cashiers forget. Just remember, it is your responsibility to make sure that the food instrument is signed before the WIC customer leaves the store.

And one more thing, make sure the name is completely written out and not just initialed. The WIC Program does not accept signatures that are initials only. The signature must have a first name and last name.

**Vanessa:** Got it, I will double and triple check.

**Eric:** And once again, if someone has a complaint about our store and how they were treated as a WIC customer, please make sure they talk to one of our managers. Our manager can give them a telephone number to call for complaints.

## SUMMARY

**Eric:** As a quick summary, in this lesson you learned what WIC is, about the three different WIC programs in Arizona, and how a participant qualifies for the WIC program. You also learned How to use the Food List, how to identify Food Instruments, ID Folders and Proxy Certifications forms. How to process WIC transactions as well as customer service.

How do you feel about all this? Do you think you're ready to jump right in?

**Vanessa:** Honestly, still wish I had a little more practice.

**Eric:** I thought you might say that, so I have a few exercises here for you to practice. I'm sure you'll feel much more comfortable with the information when you're finished.

**Vanessa:** Thanks!

## ACTIVITY 1

**Eric:** I know you were concerned about spotting valid food instruments, so let's give you some practice. A WIC shopper has just handed you three cash value food instruments. I want to you to take a close look at them and decide if any of the cash value food instruments are invalid.

## ACTIVITY 2

**Eric:** Lets practice, using what you have learned, review the products on the belt and compare them to what is listed on the food instrument. Click on any products that are not WIC approved foods or are not listed on the food instrument. When you have finished reviewing the foods, click the 'Check Out' button to begin scanning the products.

### ACTIVITY 3

**Eric:** Let's try another one, click on any products that are not WIC approved foods or are not listed on the food instrument. When you have finished reviewing the foods, click the 'Check Out' button to begin scanning the products.

### ACTIVITY 4

**Eric:** I think you've got it! But let's try one more to be absolutely sure. Click on any products that are not WIC approved foods or are not listed on the food instrument. When you have finished reviewing the foods, click the 'Check Out' button to begin scanning the products.

### CONGRATULATIONS

You've completed the WIC Vendor Cashier Training. To receive credit for this course, you'll need to pass the WIC Vendor Cashier Post-Test. Click the 'X' (upper right) to close this course and go back to the LMS where you can launch the Post-Test. Well done.