Documenting Vendor Monitoring Visits and Inventory Surveys in Crossroads

For the State WIC Agency to successfully process a completed vendor monitoring visit, both the Vendor Monitoring Visit and Vendor Inventory Survey screens must be completed in Crossroads.

When entering findings for currently authorized and applicant **retail vendors** into Crossroads, **both** the **Vendor Monitoring Visit and Vendor Inventory Survey** screens must be completed.

Note: For currently authorized free-standing pharmacies, **only** the **Vendor Monitoring Visit** screen needs to be completed in Crossroads. For Free-standing pharmacy applicants, **both** the **Inventory Survey and Vendor Monitoring Visit** screens **must** be completed in Crossroads.

The Vendor Inventory Survey screen should be completed first, **prior** to the Vendor Monitoring Visit screen for all types of monitoring visits including:

- Pre-Authorization
- Second Pre-Authorization
- Routine
- Follow-up
- Special Request

After completion of the vendor monitoring visit; document the visit in Crossroads then the WIC monitor should email the **White** copy of the monitoring report to the State WIC Office within **two business days** (email the report as a PDF file to your WIC Vendor Consultant and the WIC Vendor Unit Mailbox: NCWICVendorQuestions@dhhs.nc.gov).

Documenting the Results of a Vendor Monitoring Visit in Crossroads

Since the vendor monitoring visit is documented on both the Vendor Monitoring Visit and Vendor Inventory Survey screens in Crossroads, it is standard practice to document the minimum inventory results (page 2 of the WIC Vendor Monitoring Report) ***prior*** to documenting the monitoring visit results (page 1 of the WIC Vendor Monitoring Report).

To enter findings for a monitoring visit, search and access the vendor's record. Then under the **Quick Links** you will see **Inventory Survey and Monitoring Visit links.**

For vendor applicants, this screen will be accessible through the vendor applicant's **Authorization Checklist.**

Quick Links for Authorized Vendors



Authorization Checklist for Vendor Applicants



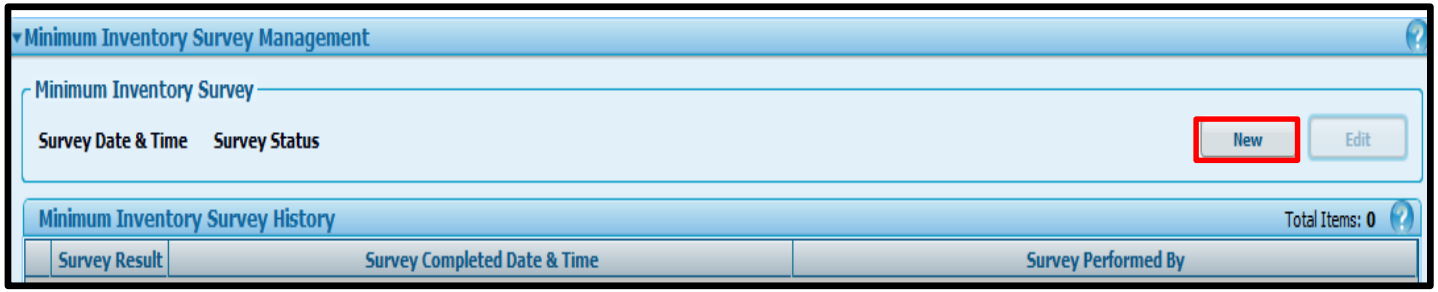
Vendor Inventory Survey

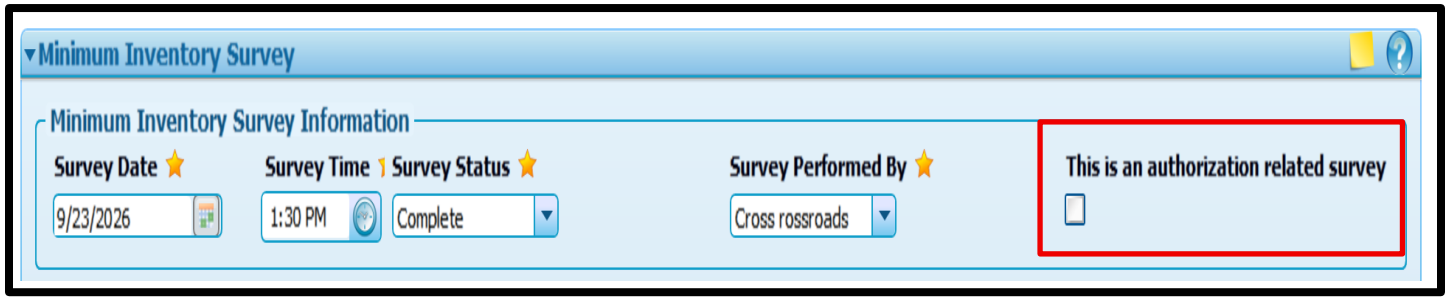
Minimum inventory results are documented on the Vendor Inventory Survey screen. To enter findings for minimum inventory (page 2 of the WIC Vendor Monitoring Report), search and access the vendor's record. Go to the **Quick Links> Operations> Inventory Survey.**

For vendor applicants, this screen will be accessible through the vendor applicant's **Authorization Checklist.**

Under Minimum Inventory Survey Information:

1. Modify the **Survey Date.** This should reflect the date that you **visited the store.**
2. Let the **Survey Time** default to the current time.
3. Select the **Survey Status** as **Complete.**
4. Select the staff member that performed the Inventory Survey in **Survey Performed By.**
5. **Only** check ***This is an authorization related survey*** if the survey is for New Vendor Authorization.



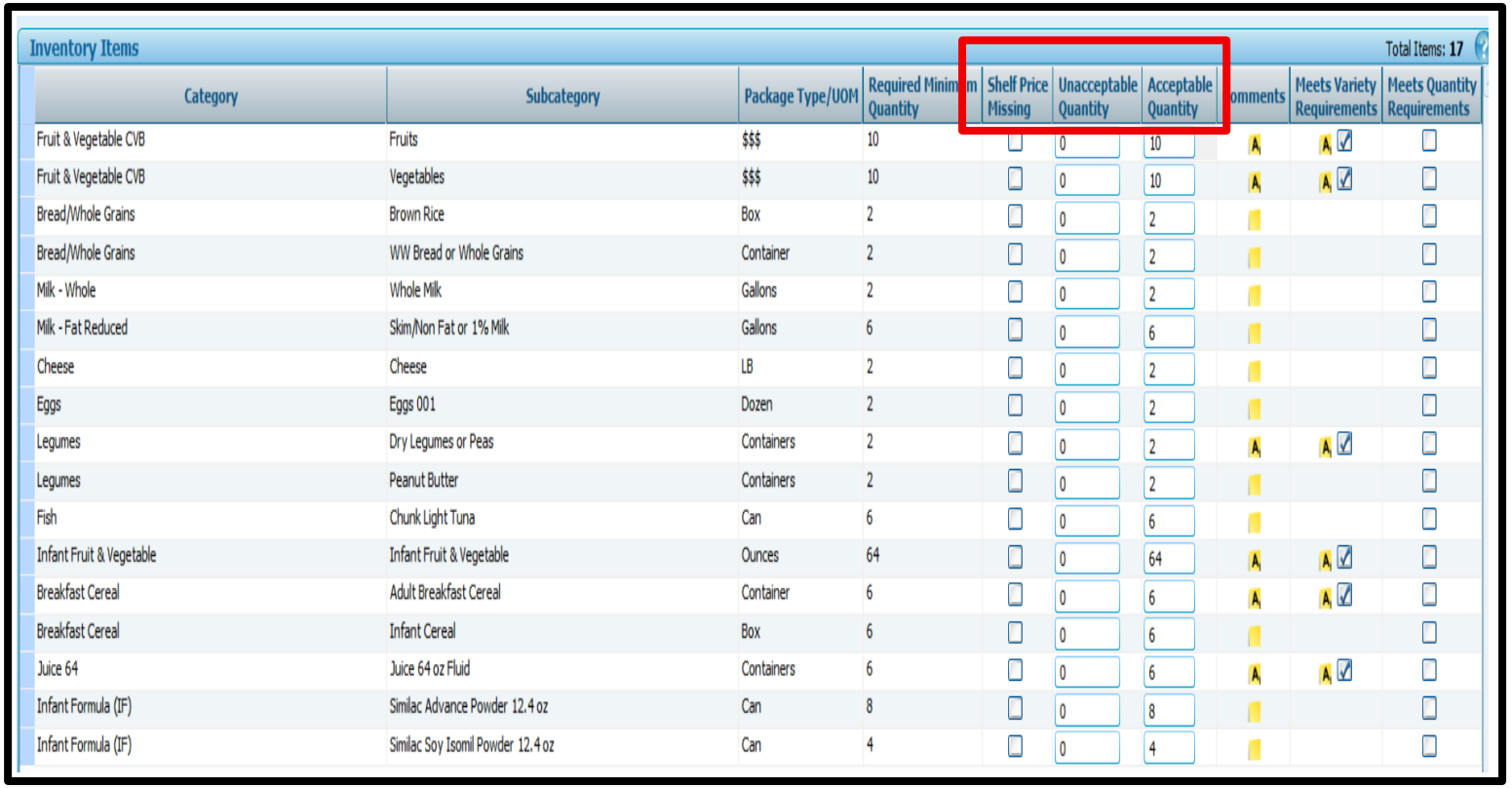


6. Within the **Inventory Items** grid, enter or select:

- **Shelf Price Missing** if the shelf price is missing.
- Enter an **Acceptable Quantity** and/or an **Unacceptable Quantity (Expired).**

For fruits, vegetables, dry legumes or peas, infant fruit and vegetable, adult breakfast cereal, and juice add the variety specific quantities together and enter that number into the Acceptable Quantity field**.** If acceptable quantity is less than minimum inventory, the row turns red.

- Click on the **sticky note** under the comments column to add any **shortages**
- The **sticky note** is where you **must document the brand, variety and quantity** for each fruit, vegetable, dry legumes or peas, infant fruit and vegetables, adult breakfast cereal, and juice.



Inventory Items — Total Items: 17

Category	Subcategory	Package Type/UOM	Required Minimum Quantity	Shelf Price Missing	Unacceptable Quantity	Acceptable Quantity	Comments	Meets Variety Requirements	Meets Quantity Requirements
Fruit & Vegetable CVB	Fruits	$$$	10	☐	0	10	A	A ☑	☐
Fruit & Vegetable CVB	Vegetables	$$$	10	☐	0	10	A	A ☑	☐
Bread/Whole Grains	Brown Rice	Box	2	☐	0	2			☐
Bread/Whole Grains	WW Bread or Whole Grains	Container	2	☐	0	2			☐
Milk - Whole	Whole Milk	Gallons	2	☐	0	2			☐
Milk - Fat Reduced	Skim/Non Fat or 1% Milk	Gallons	6	☐	0	6			☐
Cheese	Cheese	LB	2	☐	0	2			☐
Eggs	Eggs 001	Dozen	2	☐	0	2			☐
Legumes	Dry Legumes or Peas	Containers	2	☐	0	2	A	A ☑	☐
Legumes	Peanut Butter	Containers	2	☐	0	2			☐
Fish	Chunk Light Tuna	Can	6	☐	0	6			☐
Infant Fruit & Vegetable	Infant Fruit & Vegetable	Ounces	64	☐	0	64	A	A ☑	☐
Breakfast Cereal	Adult Breakfast Cereal	Container	6	☐	0	6	A	A ☑	☐
Breakfast Cereal	Infant Cereal	Box	6	☐	0	6			☐
Juice 64	Juice 64 oz Fluid	Containers	6	☐	0	6	A	A ☑	☐
Infant Formula (IF)	Similac Advance Powder 12.4 oz	Can	8	☐	0	8			☐
Infant Formula (IF)	Similac Soy Isomil Powder 12.4 oz	Can	4	☐	0	4			☐

DO NOT select Meets Quantity Requirements. This is NOT a function used in NC. If you select this option, it changes all of values to "0" . Your WIC Vendor Consultant will contact you to request that you complete the inventory survey again for each category.

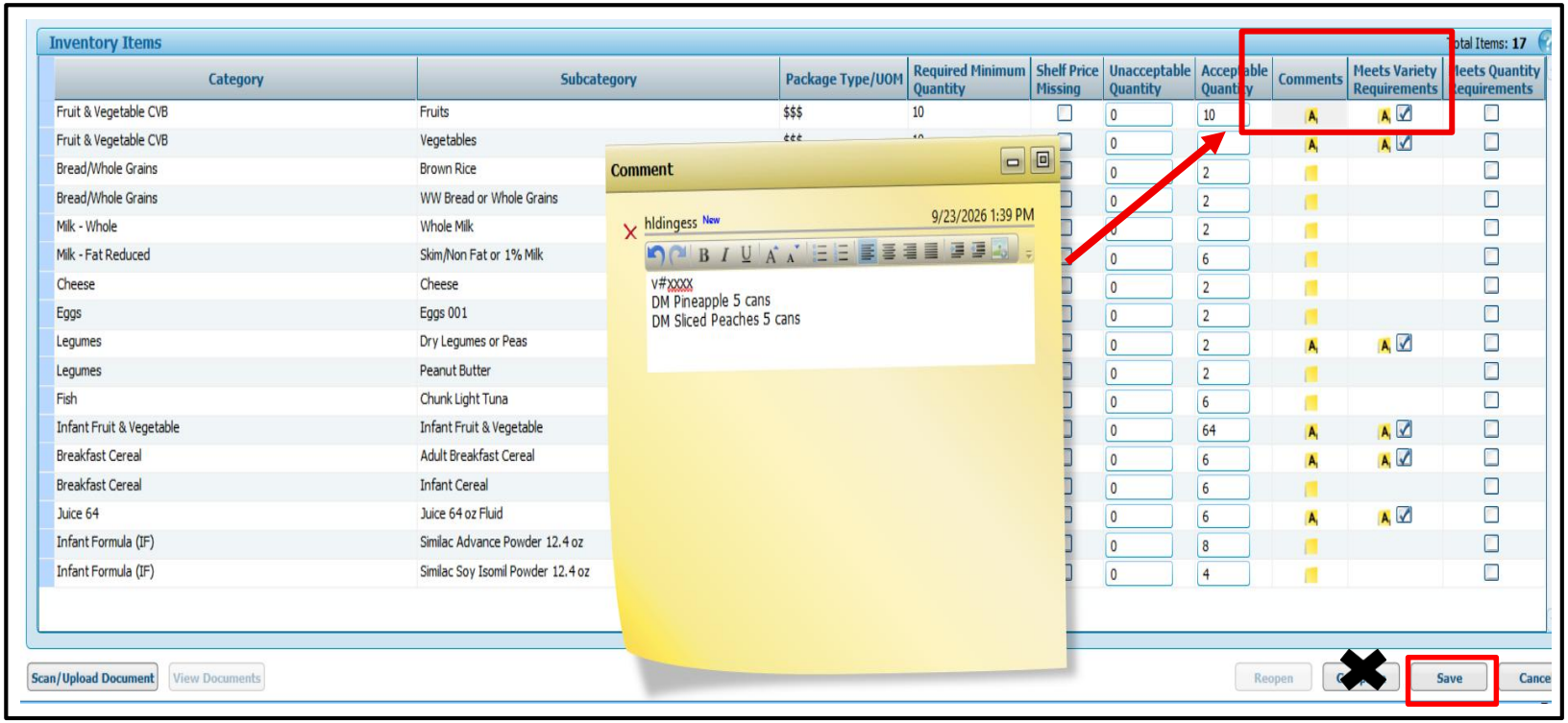
- Selecting **Meets Variety Requirements** indicates that the variety requirements for that item have been met.

- Click on the **sticky note** under Comments to enter the varieties (types) listed on the Monitoring Report.

- Click on the **sticky note** to also add any information included in the far right column of the Monitoring Report **(ex. expired foods).**

7. Select **Save** to alert State staff that the Inventory Survey portion of the Monitoring Visit is ready for assessment. **DO NOT select Complete.**

* In the **sticky note**, be sure to include the Applicant ID or Vendor ID.



Vendor Monitoring Visit

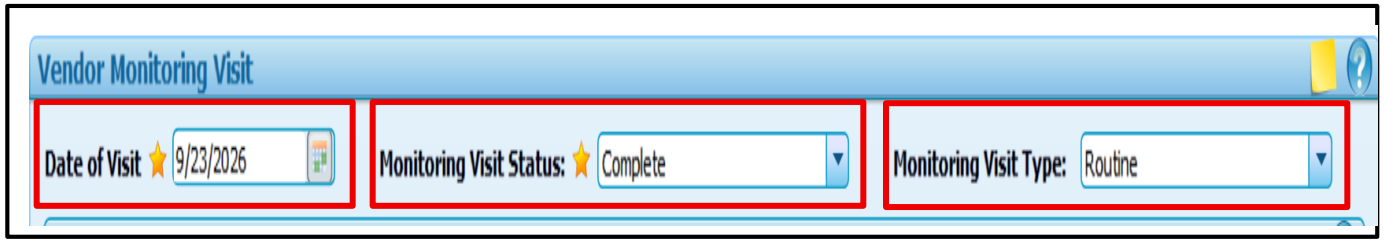
To enter findings for the monitoring visit section (page 1 of the WIC Vendor Monitoring Report), search and access the vendor's record. Go to the vendor's **Quick Links> Operations> Monitoring Visit.**

For vendor applicants, this screen will be accessible through the vendor applicant's **Authorization Checklist.**

1. Add the **Date of Visit**. This should reflect the date that staff **visited the store**.

2. Select the **Monitoring Visit Status** as **Complete.**

3. Select the **Monitoring Visit Type** (i.e. Routing, Follow-Up, Pre-Authorization, Second Pre-Authorization or Special Request)**.**

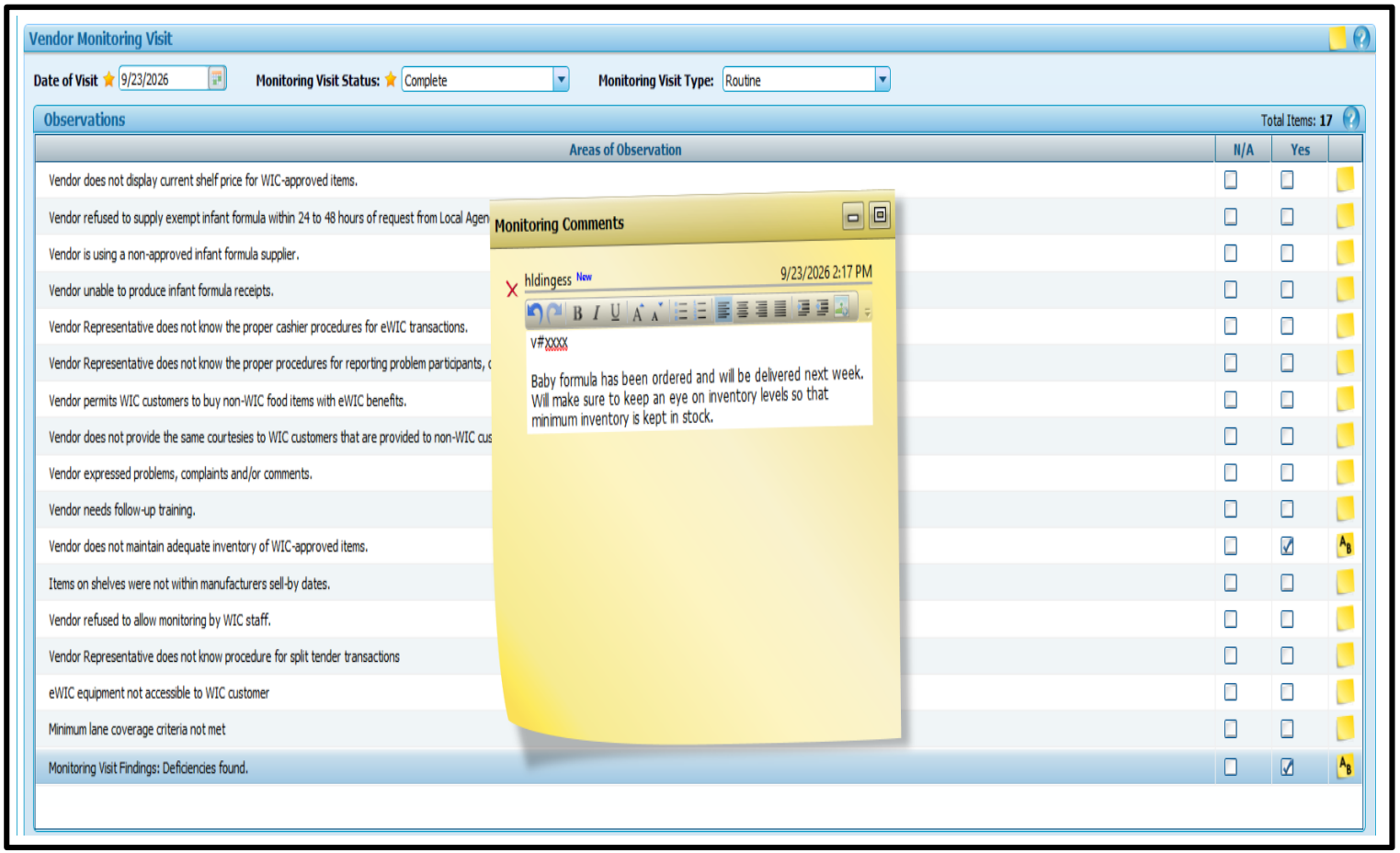


4. Carefully choose Observations:

- Select **YES** if the vendor is non-compliant/ deficient
- **DO NOT** check any of the boxes if the vendor is compliant.
- **N/A** is **NOT** an option used by NC. **DO NOT SELECT N/A**

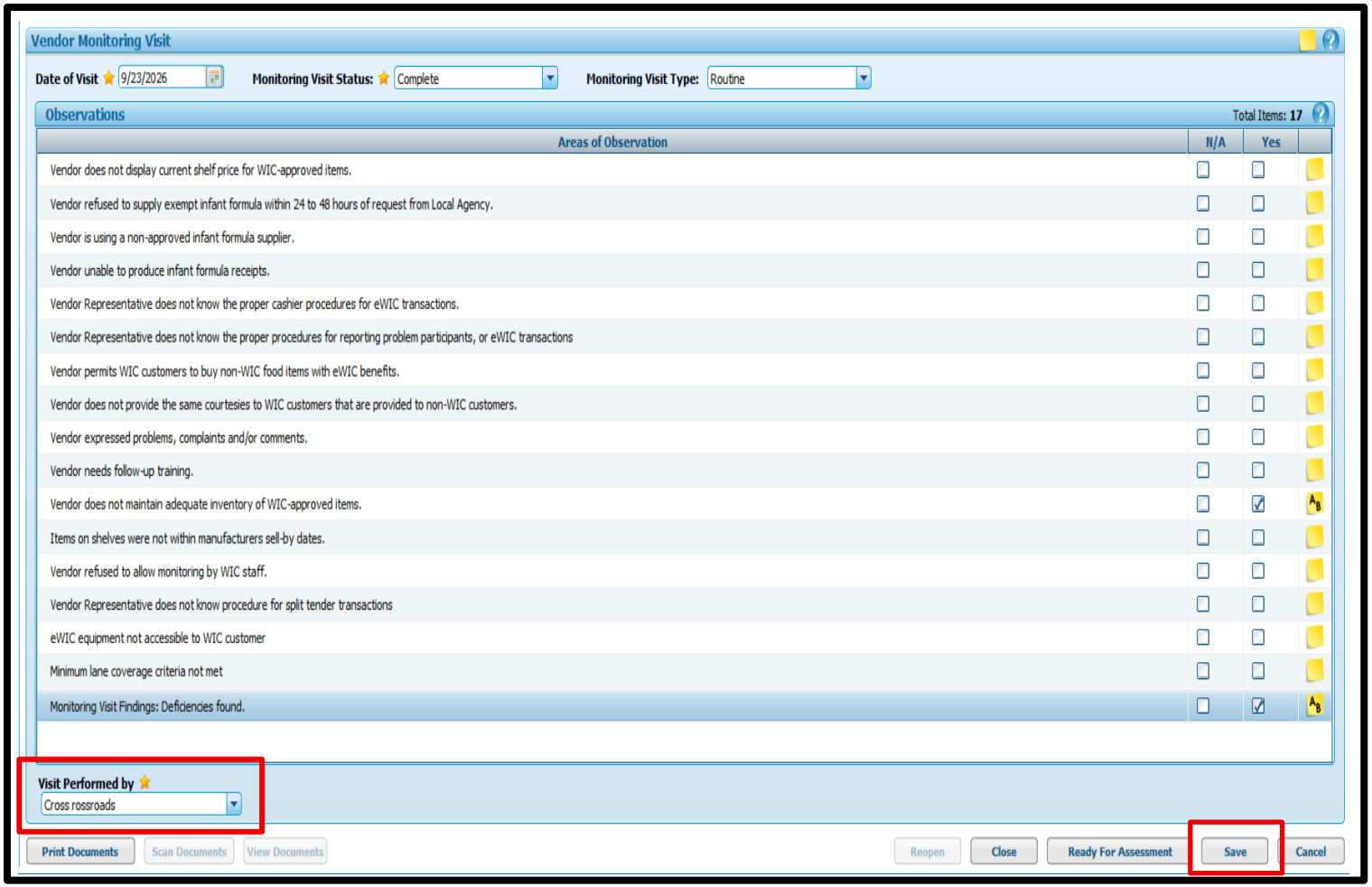
5. Use **sticky notes** to document additional comments such as any problems, training needs, or corrective action plan.

   * In the **sticky note**, be sure to include the Applicant ID or Vendor ID for the applicant or vendor.



6. Select the staff member that performed the monitoring visit in **Visit Performed By**.

7. Click **SAVE** to alert State staff that the Monitoring Report is ready for review.



Additional Documentation of Findings for a Vendor Monitoring Visit in Crossroads

Page 1 of the WIC Vendor Monitoring Report - Section VII

No Deficiencies:

If there were **no deficiencies** found in either the monitoring visit section **or** the inventory survey section, the monitoring visit is ready to be assessed by the State WIC Agency.

If Deficiencies Exist:

If **deficiencies were** found in either the monitoring visit section **or** the inventory survey section, select those deficiencies on the Vendor Monitoring Visit screen. Utilize the **sticky note beside the marked deficiency** to document additional information related to the deficiency (be sure to include the Applicant ID or Vendor ID in the comment)

Additional information related to the deficiency includes:

- The corrective action plan (CAP) that was agreed upon by the vendor in S*ection B* of *VII- Monitoring Visit Findings* should be documented in the **sticky note** beside **Monitoring Visit Findings: Deficiencies found** which is listed under Observations on the Vendor Monitoring Visit screen.
- Problems/complaints/comments expressed by the vendor in *Section IV-Quality of Service***.**
- The need or request for follow-up training by the vendor as well as the date that training is scheduled or has taken place, *Section IV-Quality of Service.*

Note: Once complete, select **SAVE** to notify State Agency staff that the report is ready to be assessed.

WIC Vendor Name and Store#: Cowboy Pantry #101 **Vendor Number:** 12905 **Date:** 9/23/2026

V. INVENTORY OF WIC APPROVED FOODS

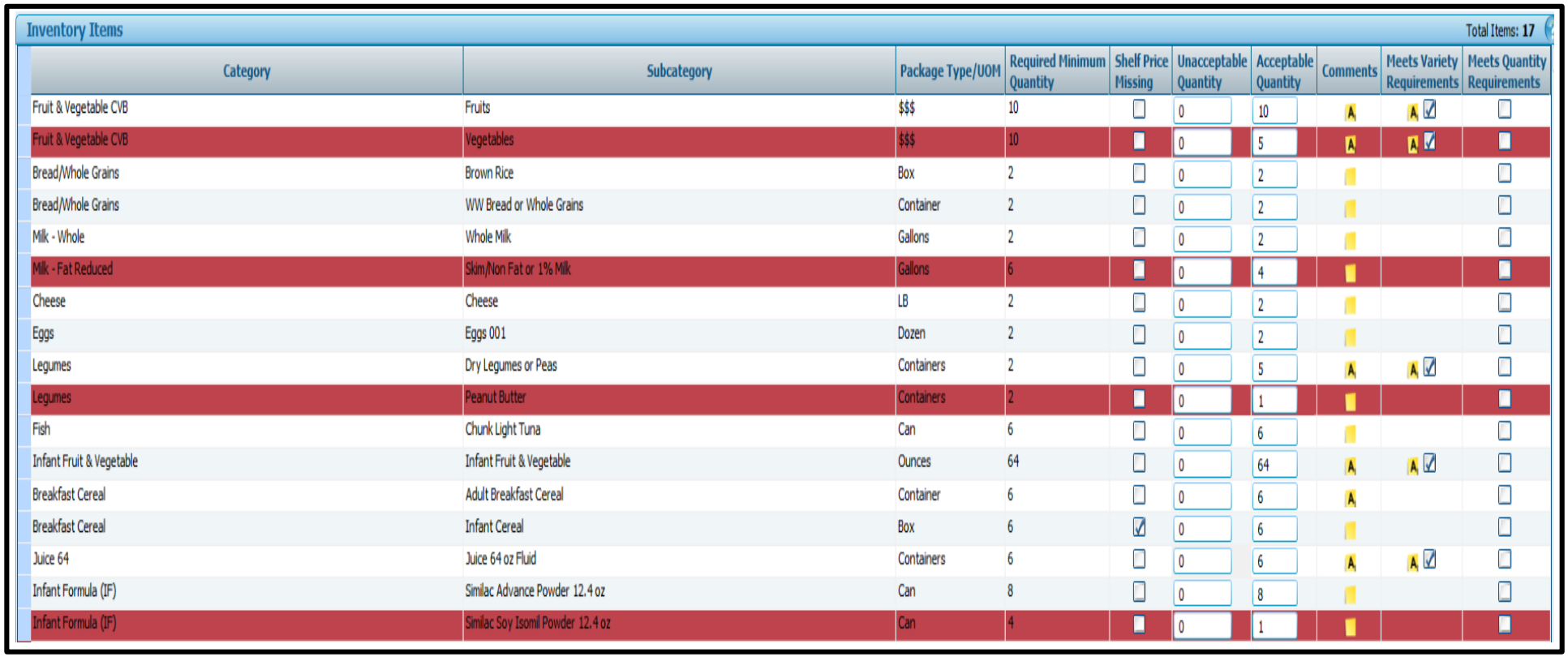
Required Food Item, and Quantity[1]		Size and Type(s)[1]	Quantity in Stock	Current Shelf Price		Shortage (Quantity and/or Type)	Valid Expiration Dates Yes/No/C	Expired Foods: Size, Type, Quantity, Expiration Dates Additional Comments
				Price of Product	Marked Yes/No			
Fruits	2 varieties 10 cans total Combined	14 to 16-ounce can without added sugar, fats, oils, or salt **Variety 1:** Del Monte Pineapple	6	$1.99	Y		Y	
		14 to 16-ounce can without added sugar, fats, oils, or salt **Variety 2:** Del Monte Sliced Peaches	2	$1.75	Y	2	N	16oz, Pinneapple, 2, 9/20/2026
Vegetables (Excludes Legumes category)	3 varieties 10 cans total Combined	14 to 16-ounce can without added sugar, fats, or oils **Variety 1:** Green Giant Corn	3	$1.75	Y		Y	
		14 to 16-ounce can without added sugar, fats, or oils **Variety 2:** Food Club Mixed Vegetables	2	$1.99	Y		Y	
		14 to 16- ounce can without added sugar, fats, or oils **Variety 3:**	0	-	-	5 cans/1 type	-	
Rice	2 packages	14 to 24-ounce package, whole grain	2	$ .99	Y		Y	
Bread/Tortillas	2 loaves or 2 packages OR 1 loaf and 1 package	16 to 24-ounce loaf of bread or package of tortillas	2	$4.59	Y		Y	
Fluid Milk - Whole	2 gallons	Whole fluid: gallon	2	$4.99	Y		Y	
Fluid Milk - Skim/low fat	6 gallons	Skim/low fat fluid: gallon	4	$4.99	Y	2	Y	
Cheese	2 packages	1-pound package	2	$3.29	Y		Y	
Eggs	2 dozen	Grade A Large – White 1 dozen size carton	2	$1.99	Y		Y	
Legumes	2 varieties 2 packages or 8 cans OR 1 package and 4 cans	1-pound package or 4 15–16-ounce cans **Variety 1:** Del Monte Lima Beans	4	$1.25	Y		Y	
		1-pound package or 4 15–16-ounce cans **Variety 2:** Goya Pinto Beans	1	$2.99	Y		Y	
Peanut Butter	2 containers	16 to 18-ounce container	1	$2.75	Y	1	Y	
Tuna	6 cans	5 to 6-ounce can	6	$ .99	Y		Y	
Infant Fruits and Vegetables	64 ounces total combined	3.5 or 4-ounce container **Type Fruit:** Gerber Bannans	32 oz.	$1.99	Y		Y	
		3.5 or 4-ounce container **Type Vegetable:** Gerber Green Beans	32 oz.	$1.89	Y		Y	
Cereals	2 varieties 6 packages total combined	Min. size: 12-oz (refer to UPC listing) Whole Grain Only **Variety 1:** General Mills Kix	2	$3.59	Y		Y	General Mills Cheerios, 2, $4.59,Y,Y
		Min. size: 12-oz.(refer to UPC listing) Whole Grain Only **Variety 2:** Post Banana Nut Crunch	2	$3.69	Y		Y	
Infant Cereal	6 boxes	8-ounce box	6	-	N		Y	
Juice 64-oz.	2 varieties 6 containers total combined	Single strength, 64-ounce container **Variety 1:** Motts 100% Apple Juice	3	$3.99	Y		Y	
		Single strength, 64-ounce container **Variety 2:** Juicy Juice 100% Grape Juice	3	$3.89	Y		Y	
Infant Formula	8 cans	Similac® Advance®, Powder, 11.0 to 14.0-ounces	8	$24.99	Y		Y	
Infant Formula	4 cans	Similac® Soy Isomil®, Powder, 11.0 to 14.0-ounces	1	$25.99	Y	3	N	12.4 oz Similac Soy Isomil, 4, 9/20/2026

[1] Refer to the NC WIC Authorized Product List (APL) for a listing of NC WIC-approved foods.

Documenting Section V (Inventory Survey) of the WIC Vendor Monitoring Report in Crossroads

- Document the quantity to be counted towards minimum inventory (the amount written in the Quantity in Stock column on the WIC Vendor Monitoring Report **must** match what is entered in Crossroads) in the **Acceptable Quantity** field. *Crossroads does not allow the addition of a (+) sign to the **Acceptable Quantity** field. For variety specific items, add both quantities together and enter that number into the **Acceptable Quantity** field. Document expired foods only in the **Unacceptable Quantity** field.
- If variety requirements were met for that inventory item, select **Meets Variety Requirements**.
- Use the **sticky note** to document details regarding expired foods **(size, type, quantity, expiration date)** along with observed varieties for inventory items with variety requirements (be sure to include the Applicant ID or Vendor ID in the comment).
- If the shelf price is missing**,** select the **Shelf Price Missing** box for that inventory item.

***This Crossroads documentation DOES NOT change the accepted documentation procedure on the actual WIC Vendor Monitoring Report form. Continue to process the paper WIC Vendor Monitoring Report form according to the Monitoring Instructions.**



Inventory Items — Total Items: 17

Category	Subcategory	Package Type/UOM	Required Minimum Quantity	Shelf Price Missing	Unacceptable Quantity	Acceptable Quantity	Comments	Meets Variety Requirements	Meets Quantity Requirements
Fruit & Vegetable CVB	Fruits	$$$	10	☐	0	10	A	A ☑	☐
Fruit & Vegetable CVB	Vegetables	$$$	10	☐	0	5	A	A ☑	☐
Bread/Whole Grains	Brown Rice	Box	2	☐	0	2			☐
Bread/Whole Grains	WW Bread or Whole Grains	Container	2	☐	0	2			☐
Milk - Whole	Whole Milk	Gallons	2	☐	0	2			☐
Milk - Fat Reduced	Skim/Non Fat or 1% Milk	Gallons	6	☐	0	4			☐
Cheese	Cheese	LB	2	☐	0	2			☐
Eggs	Eggs 001	Dozen	2	☐	0	2			☐
Legumes	Dry Legumes or Peas	Containers	2	☐	0	5	A	A ☑	☐
Legumes	Peanut Butter	Containers	2	☐	0	1			☐
Fish	Chunk Light Tuna	Can	6	☐	0	6			☐
Infant Fruit & Vegetable	Infant Fruit & Vegetable	Ounces	64	☐	0	64	A	A ☑	☐
Breakfast Cereal	Adult Breakfast Cereal	Container	6	☐	0	6	A		☐
Breakfast Cereal	Infant Cereal	Box	6	☑	0	6			☐
Juice 64	Juice 64 oz Fluid	Containers	6	☐	0	6	A	A ☑	☐
Infant Formula (IF)	Similac Advance Powder 12.4 oz	Can	8	☐	0	8			☐
Infant Formula (IF)	Similac Soy Isomil Powder 12.4 oz	Can	4	☐	0	1			☐

Division of Child and Family Well-Being
Community Nutrition Services Section
1914 Mail Service Center
Raleigh, NC 27699-1914

☐ Pre-Authorization ☐ Second Pre-Authorization ☑ Routine ☐ Follow-up ☐ Special Request

WIC VENDOR MONITORING REPORT

WIC Program Name (no abbreviations): XYZ Agency WIC Vendor Name & Store #: Cowboy Pantry #101

Vendor Number: 12905 Date of Visit: 9/23/2026 Current Store Manager's Name: Bella Anne

I. PHARMACY SERVICES *(where applicable)*
(Free-standing pharmacies complete page one only)
Vendor agrees to supply exempt formula within 24 to 48 hours of request from Local WIC Agency.
☐ Yes ☐ No ☑ Not Applicable

II. INFANT FORMULA SOURCE(S) (View sample of receipts for last quarter)
☑ Approved source (supplier) ☐ Not approved source (supplier)
☐ Vendor unable to produce infant formula receipts Explain: _____

III. VENDOR PROCEDURES Monitor Reviewed:
☑ Cashier procedure for eWIC transactions
☑ Cashier procedure for split tender transactions (procedures that allow the participant, authorized representative or proxy to pay the difference when a fruit or vegetable purchase exceeds the value of the cash-value benefit)
☑ Procedure for reporting problem participants and eWIC transactions

IV. eWIC EQUIPMENT (See criteria listed on back of this page)
☑ Ensure that equipment used to transact eWIC is accessible to the WIC participant
Number of eWIC POS terminals:
☑ Meets minimum lane coverage criteria
☐ Does not meet minimum lane coverage criteria

V. INVENTORY OF WIC AUTHORIZED FOODS (See page 2)
[1] Refer to the NC WIC Authorized Product List (APL) for a listing of NC WIC-approved foods.

VI. QUALITY OF SERVICE (To be completed after Section V, page 2)
1. Does the vendor permit WIC customers to buy non-WIC food items with eWIC benefits?
   ☐ Yes ☑ No
2. Are the WIC customers allowed the same courtesies as non-WIC customers?
   ☑ Yes ☐ No
3. Problems/complaints/comments expressed by vendor.
   None
4. Vendor needs follow-up training. ☐ Yes ☑ No
   If yes, date scheduled: _____

VII. MONITORING VISIT FINDINGS Complete Section A **OR** B

A. No deficiencies found
I verify that this store was monitored on this date. The findings in this report have been discussed by both representatives signing this form.

_____ / _____ / _____
Authorized Vendor Representative Title Date

_____ / _____ / _____
WIC Monitor Title Date

B. Deficiencies found
I, the Authorized Vendor/Representative, verify that this store was monitored on this date and that the WIC Monitor discussed the findings in this report with me prior to my signing. I understand that the WIC Monitor determined that this store is not in compliance with certain WIC Program requirements: that this report serves as a warning regarding compliance with those requirements, that this store will be re-monitored and that a finding of noncompliance during re-monitoring could result in this store being disqualified from the WIC Program. The following is my plan and time frame to correct deficiencies:
Will mark prices on items, remove expired foods and order missing items.

Bella Anne / Manager / 9/23/2026
Authorized Vendor Representative Title Date

I, the WIC Monitor, verify that I monitored this store on this date; found it not to be in compliance with certain WIC Program requirements specified in this report; and explained to the Authorized Vendor/Representative the statements contained in paragraph VII. B. of this report.

Zoe Nicole / Vendor Coord. / 9/23/2026
WIC Monitor Title Date

Contact Phone # (919) 555-8795

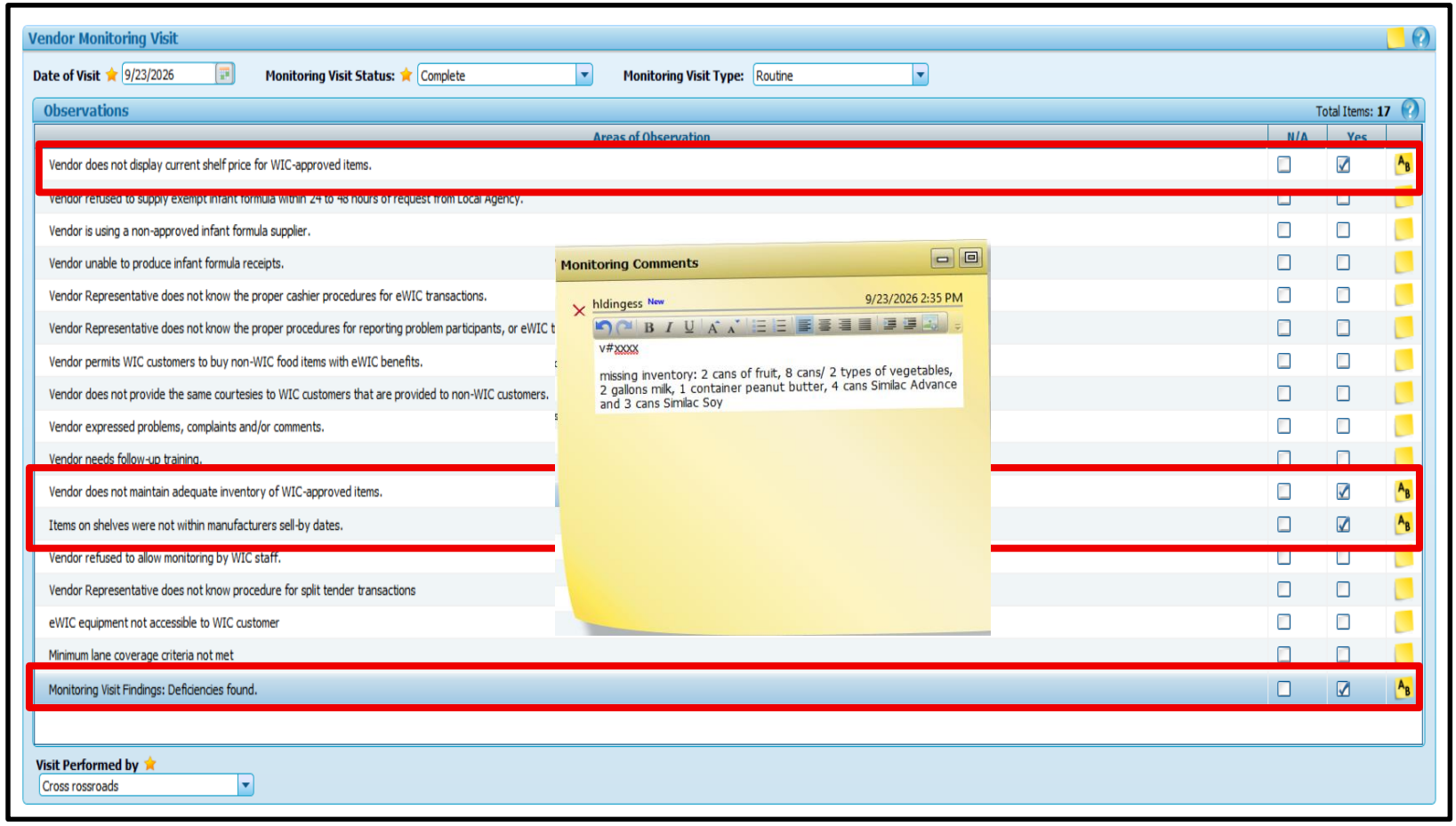
Contact E-mail: zoe.nicole@abc.co.gov

Documenting Sections I, II, III, IV and VI of the WIC Vendor Monitoring Report in Crossroads

Sections I, II, III, IV and VI

- Select "**Yes"** for each observed **deficiency** in Section I, II, III, IV and VI of the Monitoring Report. Add a comment to the sticky note associated with the deficiency to further explain the deficiency. Be sure to include the Applicant ID or Vendor ID in the comment.

- Select **Save** once this information has been entered on the Vendor Monitoring Visit screen to finalize your documentation for Section VII.



Documenting Sections VII of the WIC Vendor Monitoring Report in Crossroads

Section VII

- Do not make any selections in the Observations section of the Vendor Monitoring Visit screen if there are **no deficiencies** found during the monitoring visit and the vendor does not need/request additional training. The Vendor Monitoring Visit is ready to be assessed by the State WIC Agency.
- If there **were deficiencies** found in either the Monitoring Visit Section **or** the Inventory Survey Section, or the vendor needs or requests training, utilize the sticky note beside "Deficiencies found." This is listed under the Vendor Monitoring Visit screen Observation section. Document that information and include the Applicant ID or Vendor ID in the comment.
- Once complete, select **Save** to notify State WIC Agency staff that the report is ready to be assessed.

