

User's Guide to Field and Automated TA Forms

MS 2007/2010	Laptop	What to do...
Y	+	Y
		<ol style="list-style-type: none"> 1. Use automated field forms 2. Provide a hardcopy of the Vendor Packet* to the vendor or vendor rep 3. Collect a second signed original hardcopy of the Vendor Summary Letter to retain for your records <p>Note: At this time there is no formal CDPH policy on tablet and smart phone usage. We are awaiting directive and the release of a formal policy from the Department's Information Security Officer. If you are planning to use tablet devices instead of laptops, do not transmit any confidential or personal information. Currently, iPads and iPhones are more secure than the Android devices. We will share the CDPH policy on tablet usage as soon as it is available. Please be reminded that your agency must follow the IT equipment procurement processes outlined in Chapter 7 of the CMB. If you have questions about IT procurement approvals, please contact your regional advisor.</p>
Y	+	N
		<ol style="list-style-type: none"> 1. Use the hardcopy forms in the field 2. Transcribe data onto automated forms 3. Provide a hardcopy of the Vendor Packet to the vendor or vendor rep 4. Collect a second signed original hardcopy of the Vendor Summary Letter to retain for your records
N	+	Y or N
		<ol style="list-style-type: none"> 1. Use the hardcopy forms in the field 2. Provide a hardcopy of the Vendor Packet to the vendor or vendor rep 3. Collect a second signed original hardcopy of the Vendor Summary Letter to retain for your records 4. E-scan or fax copies to the state

*It is very important that you provide the vendor or vendor rep a hardcopy of the Vendor Packet as a complete package. This encourages the vendor or vendor rep to contact you or the State WIC Office. A hardcopy of the signed Vendor Summary Letter along with either a hardcopy or electronic copy of the MSR and Observation forms must be retained for a period of 3 years.

The Vendor Packet consists of the following documents:

1. [Vendor Summary Letter \(2\)](#)
2. [Vendor MSR](#)
3. [Vendor Contact and Resource List](#)