LVL TA Report Submission

Submission of Completed TA Forms

- When you complete a report, use the following naming convention for naming the WORD document:

Document Abbreviation	Vendor TA ID*	period	YYYY-MM-DD
MSR	30812345	.	2013-03-01 (Date of TA Visit)

So, the complete file name for the MSR example is: **MSR30812345.2013-03-01**

- The 8-digit TA ID* is a randomly generated unique identifier for WIC authorized vendors - this is the correct number to use. The 6-digit Vendor ID is a contract number - this is NOT the correct number to use.
- Please only enter the 3-digit Local Agency number on the Observations Tracking Log.
- Our data system will **ONLY** accept and read documents of the completed reports you turn in using Microsoft (MS) Word 2007 or newer. Therefore we ask that the reports be submitted via email to LVLTAReports@cdph.ca.gov so that the data can be extracted electronically. We do accept reports submitted via fax at (916) 440-5566 for agencies that do not have access to MS Word 2007 or newer.
- For those of you submitting one completed report at a time, we highly encourage you to batch multiple reports into one email transmission instead. Our email system allows up to 50 MB per email. Please review the **Job Aid** for information on how to check properties of an email or zip file for data capacity.
- **Note:** Files submitted to the LVLTAReports mailbox not using the correct naming convention or are incomplete will be REJECTED. You will be asked to resubmit the documents using the naming convention requested (*see example above*).
- When submitting multiple files or zip files, enter the month for which the reports are for (i.e., TA Reports for August 2013) in the subject line of the email.

TA Reporting Forms

- Minimum Stocking Requirements **(MSR)**
- Observations Checklist **(OBC)**
- Vendor Summary Letter **(VSL)**

The Vendor Packet

- Please 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.
- The Vendor Packet consists of the Summary Letter, Vendor MSR, and Vendor Contact & Resource List.

The LVL Packet

- The LVL Packet, which includes the prep checklist, MSR checklist and Observation checklist, is for LVL use **only**. The Vendor Packet contains hardcopy forms that you provide to the vendor or vendor rep at the conclusion of your TA visit.

TA and non-TA related activities

- Remember to keep the TA visit process separate from other LVL functions. TA documents are for you to use while conducting a TA visit. For example, if a complaint from a vendor or participant is forwarded to you while you are at your local agency, follow regular complaint reporting procedures. Do not use the TA forms to report on such complaints.