# Vendor Portal
# User Guide

**Date Updated:** 5/15/23.

# Vendor Portal Introduction

When contracting with vendors, WIC uses a secure web-based application called **Vendor Portal**. The application provides vendors with a way to apply for WIC authorization, update information about their stores, register for training, and more.

The vendor portal can only be accessed when a SecureAccess Washington (SAW) account is setup. SAW accounts help us verify a person's identity and will keep your information protected. (SAW) allows internet access to several online government services through one website. We mention this as you may already have a saw account set up with another state agency.

# Table of Contents

# New Vendor Portal User Setup - Existing Vendor

**Before starting, please keep the following in mind:**

- These steps are for vendor staff who are new to the vendor portal and state staff, or a local vendor staff member, added you on to an existing vendor portal account.

- We recommend completing all steps uninterrupted. That way you are less likely to run into issues setting up your account.

1. As a new user, you should have received an email titled "**Cascades Vendor Portal Registration**". This email will include:
   a. A **link** to create a Secure Access Washington (SAW) account.
   b. A **service code** to set up the account.
   c. Your **first name, last name, and username** entered in by the primary contact user.
   d. **Click the URL link** in the email.
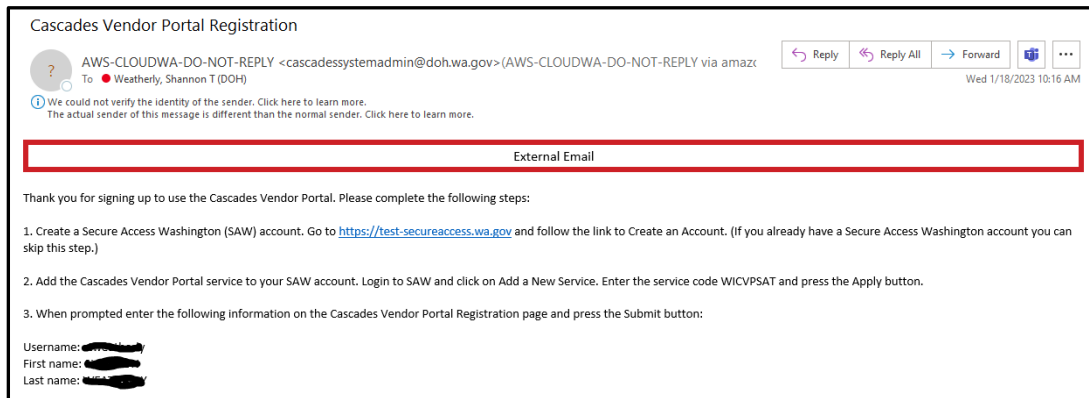


2. You will then be sent to the Secure Access Washington page below.
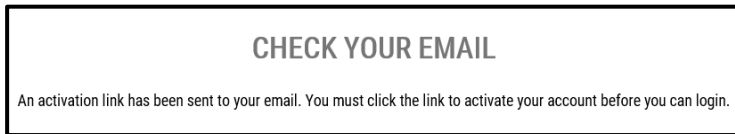   a. Select "**Sign Up!**".
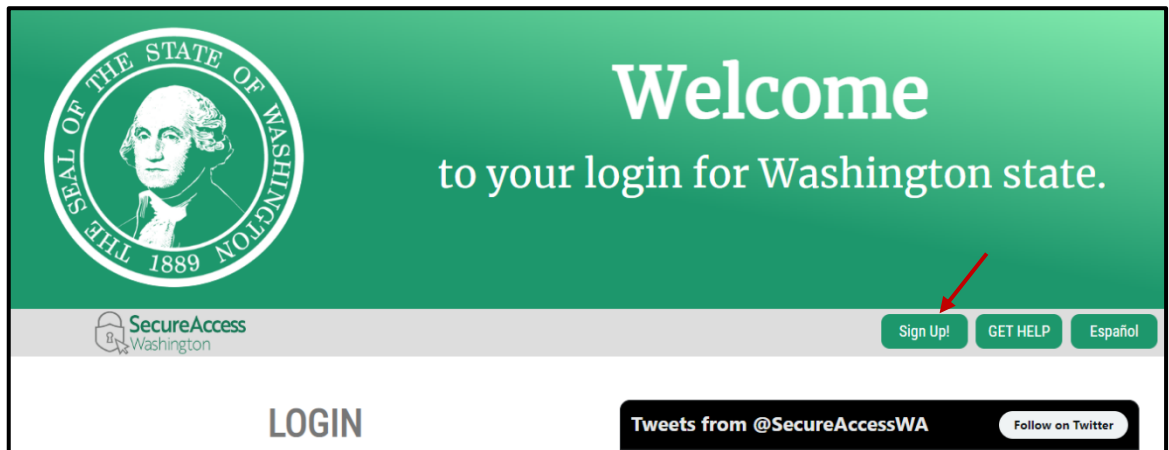
3. Complete the **Sign Up For An Account** screen.
   a. Fill in your **name** and **email**.
   b. Enter your **User ID** and create a password.
      - The User ID and password are case sensitive.
      - **Passwords** must be a minimum of 10 characters long and contain at least 3 of the following character types:
        o upper case letters
        o lower case letters
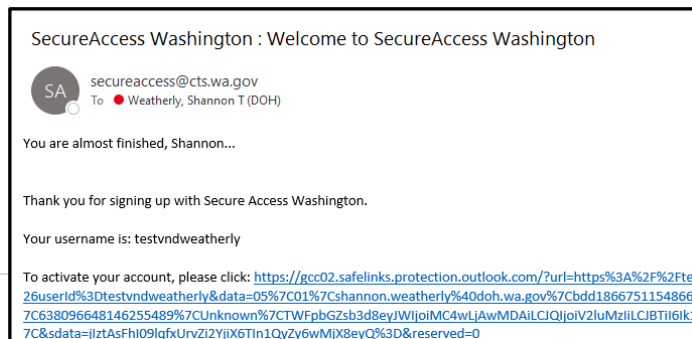        o numbers
        o special characters.

Examples of special characters are: $ @ ! # * & %.

   c. Check the box for "**I'm not a robot**".
      - Pass the challenge.
      - Note the challenge pictures may come up several times before you can pass.

   d. Select "**Create My Account**".

4. You will see a message pop up that says, "**check your email**" (see below).

> **CHECK YOUR EMAIL**
>
> An activation link has been sent to your email. You must click the link to activate your account before you can login.

5. **Close completely out of your Internet browser** before continuing. If not, you will get an error message in a future step.

6. **Check your email box** for the following:
   a. The email subject will say "**SecureAccess Washington: Welcome to SecureAccess Washington**".
   b. If you don't see it check your email junk file.
   c. **Click the link** in the email.

SecureAccess Washington : Welcome to SecureAccess Washington

SA   secureaccess@cts.wa.gov
     To ● Weatherly, Shannon T (DOH)

You are almost finished, Shannon...

Thank you for signing up with Secure Access Washington.

Your username is: testvndweatherly

To activate your account, please click: https://gcc02.safelinks.protection.outlook.com/?url=https%3A%2F%2Ftes 26userId%3Dtestvndweatherly&data=05%7C01%7Cshannon.weatherly%40doh.wa.gov%7Cbdd1866751154866b 7C6380966648146255489%7CUnknown%7CTWFpbGZsb3d8eyJWIjoiMC4wLjAwMDAiLCJQIjoiV2luMzIiLCJBTiI6Ik1l 7C&sdata=jIztAsFhI09lqfxUrvZi2YjiX6TIn1QyZy6wMjX8eyQ%3D&reserved=0
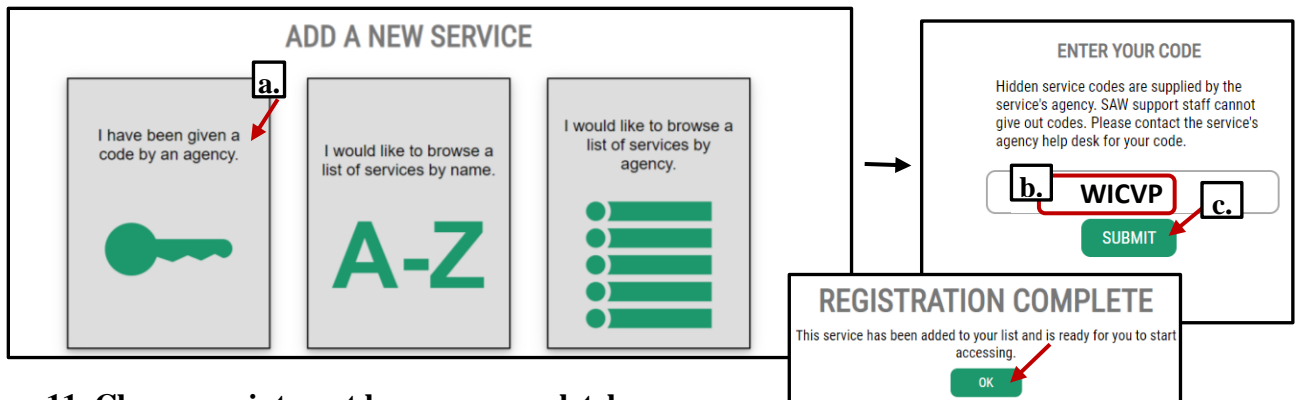
7. The Secure Access log in screen should appear (see below).
   a. **Log in** using the username and password. **Important! Don't allow the site to remember your password**.



8. The message below will appear. Select "**Add A New Service**".
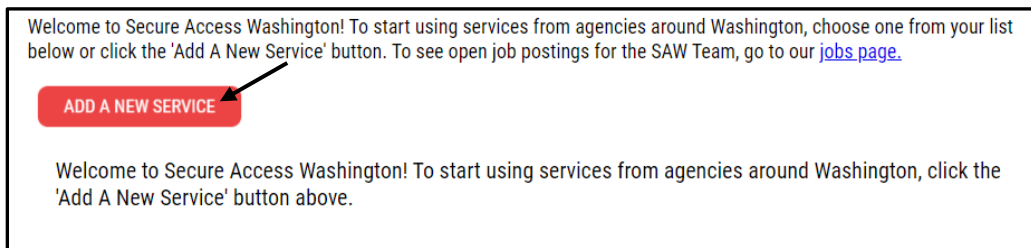


9. The screen below will appear.
   a. Select "**I have been given a code**".
   b. Enter "**WICVP**" in the box that appears.
   c. Select **Submit**.



11. **Close your internet browser completely**.

**12.** Open a new internet browser and use https://cascades.xr-wic.com/VendorPortal to log in.

**13.** The **Vendor Portal** page will appear.

    a.  Under **Existing Vendor.** select **Log On**.



**14.** The following screen will appear.



    a.  **Enter in the same information** you used to setup your account:
  - User name.
  - First name.
  - Last name.

    b.  Select **submit**.

**15.** You will then see the **Vendor Application** screen and you are in the system.

    a.  If you have **one store**, go to the next page (**page 8**) to start the Authorization process.

    b.  If you have **multiple stores**, go to **page 14** in the instructions.

# Existing Vendor Reauthorization – Single Store

**Before starting, please keep the following in mind:**

- These steps are for vendors currently working with WIC who will reauthorize for a new contract period.
- **Important!** If you need to leave the application before you're done, make sure to complete the \***required fields**\* first and select "**Save**". The "Save" button will let you come and go as needed, but once you select "Submit" its final and your work can't be edited.

1.  Go to the **Cascades Vendor Portal URL** https://cascades.xr-wic.com/VendorPortal.

2.  Under **Existing Vendors**, select the **Log On** button.
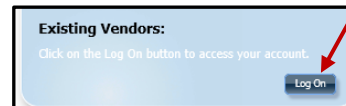
    

3.  You will be redirected to the **Secure Access Washington (SAW)** Welcome page.

4.  **Log into SAW**.
    a.  If you forgot your use name and password, follow the instructions on page 25 to reset those options. **Important! Don't allow the site to remember your password.**

5.  Once logged in, the **Vendor Portal home screen** for your store should open.

**6. Choose Vendor Application**



**7.** The **Vendor Application** screen will display:



**8. Update and modify all information** on the application screen.

    **a. Contact Information**

- Please **include the store manager's email**.

**b. Hours of Operation**



**c. Annualized Sales:**

- Select **Actual**

- Update **Total SNAP Sales**, **Total Food Sales**, and the **Sales Year**.



**d. Store Information:**

- Review and update:

    o Number of Registers

    o Grocery Square Footage

    o Primary Formula Source

    o Primary Grocery Source.

- Make sure the **following boxes are checked:**

    o Is Vendor E-WIC Capable?

    o Does vendor have scanners?

    o If applicable, also check "Is Vendor authorized by other states".

**e. Cost Containment:** Update all responses to the questions listed.



**f.** Expand and complete the **State Defined Questions** section of the screen.



**Important!** Once you select submit, you **can't change the details**. Instead select "**save**" in case you need to go back in a few times. Once done then select submit so the state office knows it's ready for review.

9. **Once the application page is completed**, select Submit.



10. You will return to home screen.

   a. **Choose Price Survey**.

**11.** Select **New**.



**12.** Add each **food category** and **subcategory** until all of them are added from the list. Some categories (e.g., Legumes) will have more than one subcategory. You must add them all.
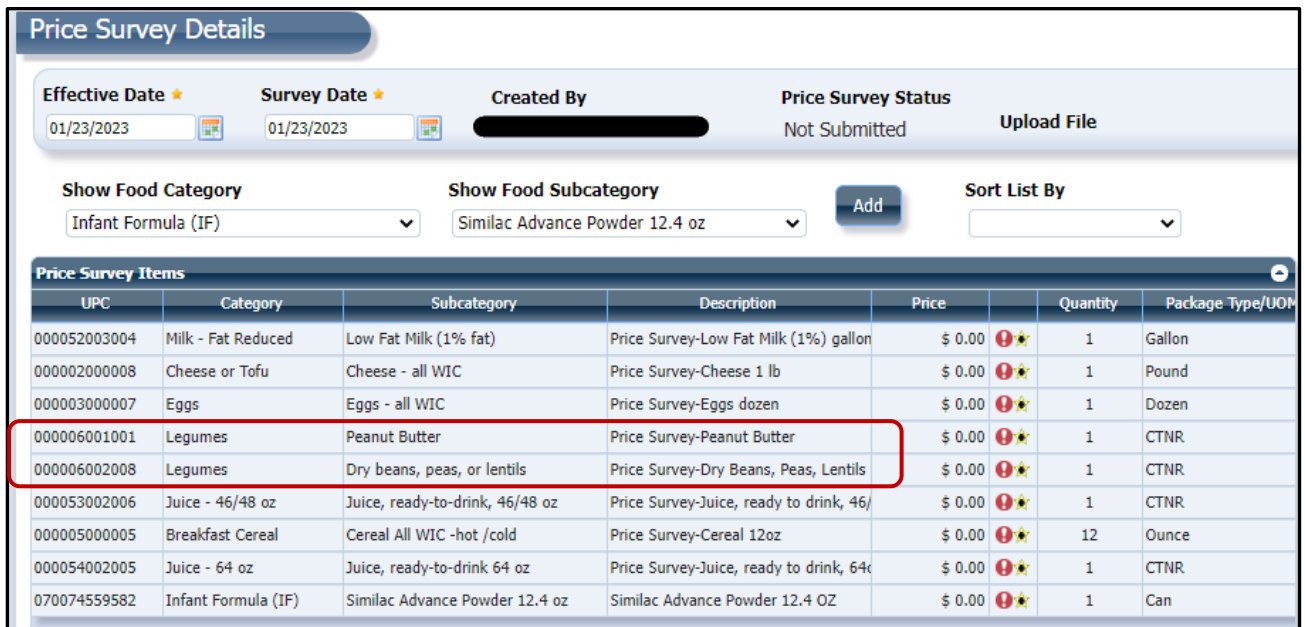


**13.** Complete the **Prices**:

   **a.** All prices documented should reflect the **most expensive WIC approved item you stock** in that **size/variety**.

   **b.** When to select **Save:**

   - If you can't complete the price survey screen all at one time and need to go back later to make any final changes, select **Save**.

- After saving, when you return to the Price Survey you will see the survey you worked on listed with the word "Edit" as an option (see below).

  o Select "**Edit**" to make any change.



c. **Select Submit,** only when you are done with the price survey screen. **Important! If the price survey is "Denied", see Page 26 for next steps.**



## 14. Application Status:

- **Both the application and price survey must be submitted** before the state team can process your application.

- Application status = **Pending**.



- Once approved it will show as "**Authorized**".

# Existing Vendor Reauthorization – Multiple stores under one corporation

**Please Note:**
- You will need to repeat all steps for each store under a corporate name.
- **Important!** If you need to leave the application before you're done, make sure to complete the required fields first and select **"Save"**. The "Save" button will let you come and go as needed, but once you select "Submit" its final and your work can't be edited.

1. Go to the Cascades **Vendor Portal URL** https://cascades.xr-wic.com/VendorPortal.

2. Under **Existing Vendor**s, select the **Log On** button.
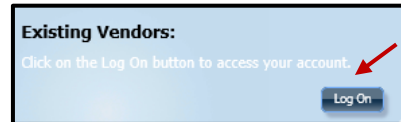


3. You will be redirected to the **Secure Access Washington (SAW)** Welcome page.

4. **Log into SAW**.
   - If you forgot your use name and password, follow the instructions on page 25 to reset those options. **Important! Don't allow the site to remember your password.**

5. **Once logged in**, the Vendor Portal home screen for your stores will open.
   - You will see all your stores listed.
   - For each store listed you must update the store details and submit an application.
   - Choose a store by clicking on the magnifying glass next to it.

6. The **Vendor Application** screen will display:



7. **Update all information** within the application screen.

   a. **Contact Information**

      - You must **include the store manager's name and email**.



   b. **Hours of Operation**:

c. **Annualized Sales:**

- Select **Actual**

- Update **Total SNAP Sales**, **Total Food Sales**, and the **Sales Year**.



d. **Store Information**:

- Number of **Registers**.

- Grocery **Square Footage**.

- Primary **Formula Source**.

- Primary **Grocery Source**.

- **Make sure the following boxes are checked**:

  o Is Vendor E-WIC Capable?

  o Does vendor have scanners?

  o If applicable, also check "Is Vendor authorized by other states."

e.  **Cost Containment:** Update all responses to the questions listed.



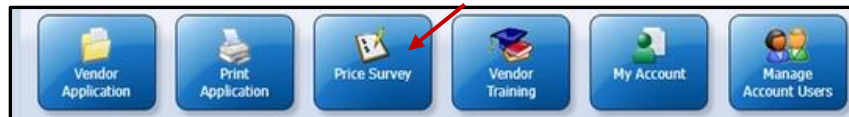f.  Expand and complete the **State Defined Questions** section of the screen.



**Important!** Select **Save** if you need to start and stop the application process. Once you hit Submit you can't change any details.

8.  Once the application page is final, select **Submit**.



9.  You will return to home screen.

    a.  Choose **Price Survey**



10. On the Price Survey screen, select **New.**

**11.** Add each **food category** and **subcategory** until all of them are added from the list. Some categories (e.g., Legumes) will have more than one subcategory. You must add them all.



**12. Complete the Price Survey.**

a. All prices documented should reflect the **most expensive WIC approved item you stock** in that **size/variety**.

b. **When to select Save**:

- If you can't complete the price survey screen all at one time and need to go back later to make any final changes, select **Save**.



- After saving, when you return to the Price Survey you will see the survey you worked on listed with the word "Edit" as an option (see below).

    o Select "**Edit**" to make any change.

**c.** Select Submit**: Only when you are done with the price survey screen.**



**13.** Once submitted, the **Cascade Price Survey pop-up displays** to either apply the price survey to this one specific store or to multiple stores in the same peer group. **Tip! If you want a list of which stores are in each peer group for you to compare, please email us at**
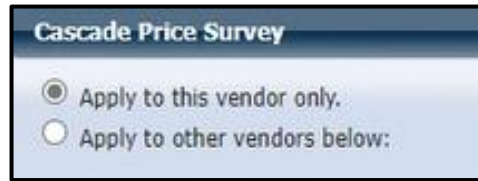
**WICRetailManagement@doh.wa.gov**. **Important!** **If the Price Survey is Denied, please see page 26 for next steps.**
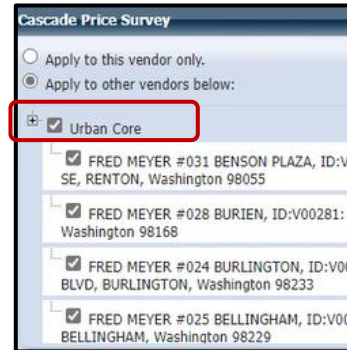
    a. **Select either**:

- Apply to this vendor only.

**Or**

- Apply to other Vendors below.
  - Click the **plus sign** + to display all corporate vendors.
  - **Select the check boxes** to indicate all vendors to which the price survey will be applied.

    b. **Then select, Ok.**

**14.** The application will then take you back to the home screen.

**Important!**

- Repeat all steps above for each store under the corporate name.

- Price surveys:

  a. **Stores with multiple locations within one peer group, will need to complete only one price survey per each peer group.** If you apply the price survey to each store under the same peer group, it will automatically show up in each of those store's applications shown in step 13.

  b. **Separate price surveys.** If you marked "Apply to this vendor only" or didn't mark some stores as part of the survey in steps 13, a new price survey will need to be created for those specific stores.

# How to Edit User Accounts

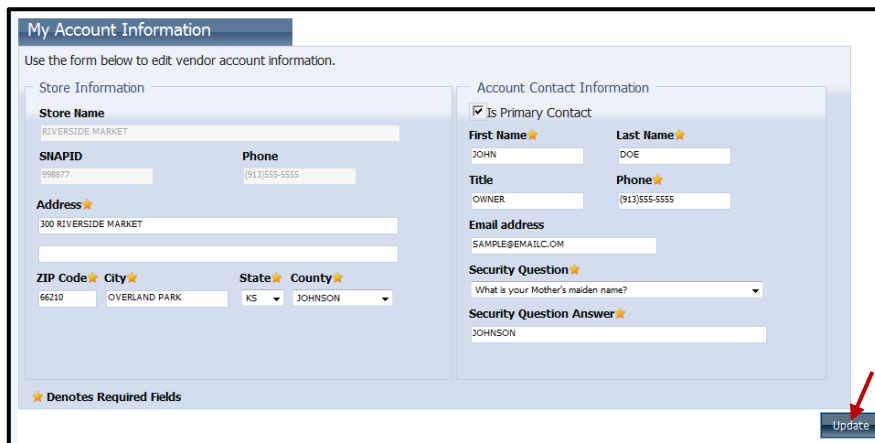Throughout the contract period, we suggest you update certain details in your vendor account. This is important if there is a change in the address or email.

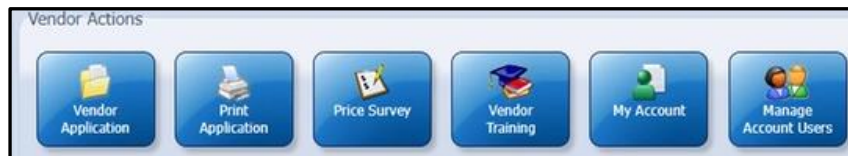1. From the Vendor Management Screen, select "**My Account**".



2. Update **Store Information** and **Account Contact Information** as necessary.

   a. Select "**Update**".



   b. Changes are processed and you will return to the Vendor Management Screen.

# How to Add or Deactivate Users

1. Access the **Vendor Portal Home** screen.
   a. Select **Existing Vendors** and **log in**.



2. Select **Manage Account Users**
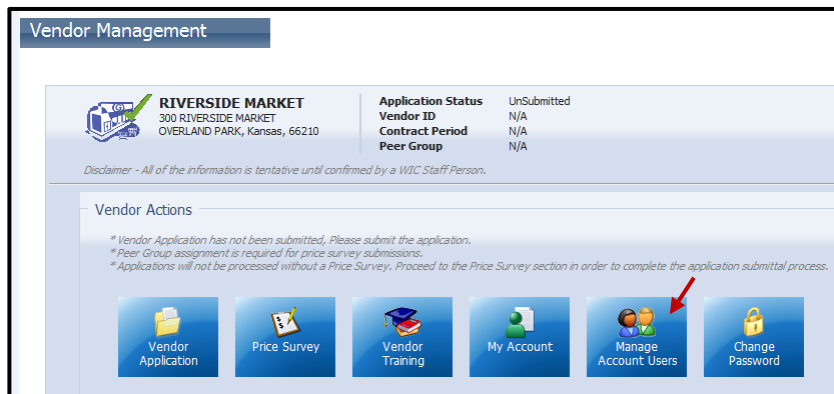


3. The **Manage Account Users** screen will display.

   a. Click **Add New User**.

4. The **New User – Login** screen displays.

   a. Enter or select a **Vendor Contact Person**.

   b. Enter the **First Name**.

   c. Enter the **Last Name**.

   d. Enter the **Phone**.

   e. Enter a **User Name**.

   f. Enter an **Email address**.

   g. Click **Save**.



5. You are returned to the **Manage Account Users** screen.

   a. The **newly added user** is displayed.

6. **To deactivate a user**
   a. **Find the user** you want to disable. In this case we will disable Kathy Lee
   b. **Click** the "**IsActive**" check box in the same row as Kathy Lee.
   c. A "**User Deactivated**" message will appear to let you know the Kathi is deactivated.

| Manage Account Users | | | |
|---|---|---|---|
| **Vendor Portal Users** | | | |
| Name | User Name | Last SignOn Date | IsActive |
| SUNNY SUNSHINE | ssunshine | 5/8/2023 | ☑ |
| KATHY LEE | KathyLee | | ☐ |

**User deactivated.** ✕

# Trouble Shooting

1. **SAW account –** You don't remember your username and/or password.
   a. Start with your username first by selecting "**Forgot your username".**
   b. Then select **"forgot your password"** to setup a new password.
   c. If it's not working, you may need to contact the state WIC program to get further assistance.



2. **SAML Message**



This error occurs when you don't' follow the steps that ask you to **close your internet browser**:

- Step 5 on page 5.
  Or
- Step 11 on page 7.

Depending on where you are in the process, and see the error, go back to the step where you were last asked to close the browser and complete all those steps again.

3. **Price Survey:**

   a. **Unable to add Category and Subcategory**
      o This is due to the square footage noted in the application.

      o If you run into this issue, contact the state WIC team at wicretailmanagement@doh.wa.gov. They can look at what you noted for square footage and make any appropriate changes.

   b. **Price Survey – Denied Price Overage Upon Submission**



      o This happens when one or more of the prices you listed in the survey are above the WIC maximum allowed amounts.

      o The state WIC Vendor Management Team will contact you in order to manually make necessary changes and resubmit price survey.

If you experience any other issues or have questions, please contact WICRetailManagement@doh.wa.gov.

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