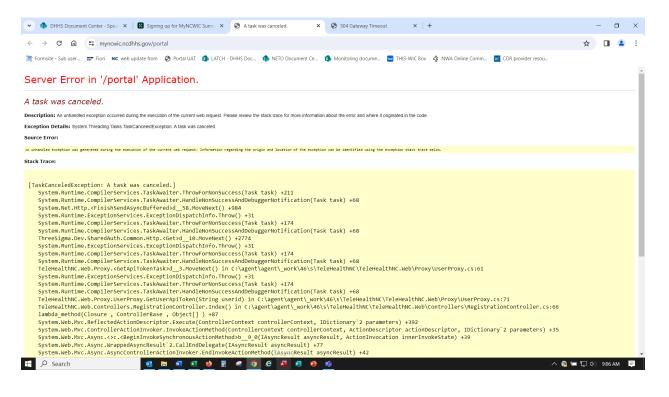
The Community Nutrition Services Section (CNSS) has developed **MyNCWIC**, a participant-facing web portal solution that interfaces seamlessly with Crossroads, for streamlining WIC services and gathering participant assessment information prior to appointments. This resource provides guidance to help manage Known Issues during rollout (April 1, 2024 – June 12, 2024). Use this resource in addition to <u>MyNCWIC / Crossroads User Resource</u> (a summary of MyNCWIC Portal Training Lessons 3-31) and the <u>Portal Users Guide</u>. This resource will be updated as solutions are provided.

Language Issues

Some portal users are not able to set the language on their phone to see **MyNCWIC** in their desired language. This appears to be a phone operating system issue. Users should try to update their phone and then reset the language again. Users can also use **MyNCWIC** on a desktop computer.

Login Screen

Portal users received the below error message when navigating to the portal URL. This has been investigated by our computer vendor and is believed to be a local network issue. Portal users should wait a few minutes then try to access **MyNCWIC** again.



Linking NCID with Family ID

Some participants report the error message "An issue occurred during login, please try again," when signing into **MyNCWIC**. They most likely have entered their eWIC card number incorrectly and they should try reentering the number correctly. CNSS has requesting a change to the message wording for clarity.

Portal Request/Update Message

When an appointment is requested, rescheduled or cancelled, a family member added, or address of the family updated, a message/banner is shown at the top of the screen: "The [request] saved." This banner disappears quickly and there is no other message that remains. This may be confusing for the user/participant. This banner will be changed to state, "The [request] has been sent to the local agency for confirmation." We have asked whether the banner can REMAIN until the confirmation is returned.

■ MyNCWIC Portal	LogOut
New Appointment Request Information Saved.	×

It is also **IMPORTANT TO REMEMBER** that information in the MyNCWIC Portal **always reflects the currently saved information in Crossroads**. Participants may request changes to appointments or submit information to prepare for upcoming appointments, but no changes will be visible in the portal until they are accepted by WIC staff.

Pre-Preparation for Appointments

The pre-preparation for appointment questions on **MyNCWIC** correspond to the questions in Crossroads, which are pre-configured. We are working on making the language as participant-friendly as possible (example: food insecurity question).

Appointments in Crossroads have dynamic information requirements, based on the participant category and the type of appointment. **MyNCWIC** will support the pre-appointment preparation for all participant categories and the following types of appointments:

- Nutrition Education/Food Benefit Issuance appointments.
- Mid-Certification Assessment appointments.
- Subsequent Certification appointments for existing participants.
- Certification of new family members.

IMPORTANT TO REMEMBER: **MyNCWIC** will not support the creation of a new family but will support the addition of a new participant to an existing family. A family must be issued an eWIC card in order for them to link their (Individual) NCID with their Portal/Crossroads information.

Upload Documents / My Documents

The My Documents screen allows the user to read documents sent from the WIC clinic and/or send documents to the WIC clinic.

Uploading a document in the Portal, then uploading a new document for the same option in the Portal will REPLACE the uploaded document seen when viewing the document in Crossroads. Crossroads will not show both, only the most recently uploaded.

Deleting an uploaded item in the Portal will DELETE it from being viewed in Crossroads; however, if the uploaded item is viewed AND SAVED in Crossroads before being deleted from the Portal, the item will no longer be visible in the View Telehealth Documents button BUT its saved version will STILL be visible in the Family Documents area of Crossroads.

Rights & Responsibilities (Signatures)

The portal currently has signature functionality for Rights and Responsibilities but not Affidavits. Affidavit functionality will be added in a future upgrade.

My Messages

The My Messages screen allows the user to read messages sent from the WIC clinic and/or send messages to the WIC clinic.

IMPORTANT TO REMEMBER: This communication functionality is not "real-time" or "instant," nor will it provide alerts (email or text) to the participant when a new communication is sent by the clinic staff. The participant will need to open the portal to see the My Messages icon and view the communication.

Currently the My Messages screen does not have any alert functionality. Local users will have to refresh the Communications search page to see if new Messages have been sent to their agency. An improved Inbox/Dashboard will be added in an upgrade that will make it easier for local staff to sort, respond to and delete messages.

Crossroads Clinic Telehealth Dashboard: Upcoming Telehealth Appointments

Upcoming appointments are listed in the order received but are sortable by Appointment Date. Click the pencil icon to navigate to the participant's Family Demographics screen.

We have submitted a request for there to be some kind of Unsaved Data Indicator functionality that will indicate to Crossroads users about which screen(s) contain data for input and/or documents for review.

View Telehealth Documents

IMPORTANT TO REMEMBER: After you select the **View Telehealth Documents** button, you may see an empty box. Use the scroll bar on the right side to scroll down and see uploaded documents. Click on the magnifying glass icon on the right side for a document preview to appear.

To save or not to save? Some information will be reviewed and imported while other information will be reviewed only and not saved within Crossroads. The rule of thumb is simple: Would you scan in the document if it were handed to you in-person? If yes – import and save. If no – view only and do not save.

Crossroads Family Demographics Screen

WIC participants may submit changes to their Family Demographics through the My Personal Information screen of the portal. Best practice for making changes to this screen in Crossroads is to confirm the information with the family before changing/saving in Crossroads. Example: If Email is selected as the preferred contact method and phone no longer selected, confirm whether the family wishes to opt out of appointment reminders via Teletask before saving changes.

Appointment Requests: New, Reschedule, Cancel

These requests currently remain in these containers. We have submitted a request for the next upgrade for there to be a way to delete the requests once they have been worked.

Appointment Requests: New, Reschedule

For appointment requests, will staff need to write down or take a screenshot of the participant request before using Quick Appointments so they ensure they chose the selected options? (Quick Appointments pulls up other time options than what was requested.) Note that if you click "Cancel" while on the Quick Appointments screen, Crossroads navigates back to the Clinic Telehealth Dashboard and the options can be reviewed. This functionality will be improved in a future upgrade so that Quick Appointments pulls up only requested time options.

If you have questions regarding any policy aspect of this document, please contact your Regional Nutrition Consultant. If you have any questions about Crossroads procedures, please contact the CNSS CSD at 919.707.5795, or via email at <u>CNS.CustomerService@dhhs.nc.gov</u>.