

Road Map for a Complete Certification (includes prescribing food, issuing benefits and scheduling)

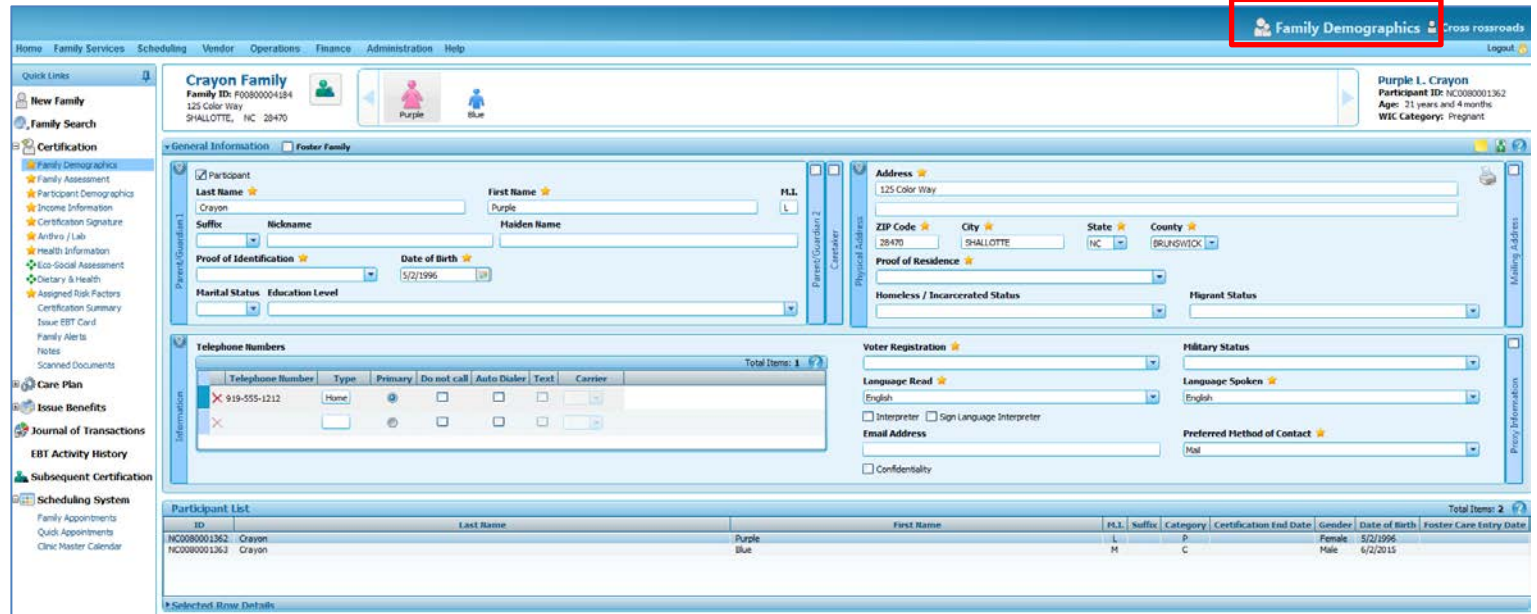
Certifications require that a number of system screens be completed by different WIC staff including Support Staff, MOAs, BFPCs and CPAs. Some screens need to be completed once for the entire family, while other screens need to be completed individually for each member of the family. This resource goes screen by screen to indicate the fields that need to be completed and the staff role most likely to complete each screen. Required fields in Crossroads are designated by a yellow star (★); additional fields may be required by North Carolina policy.

1. The **New Family** screen will most likely be completed by support staff.
2. In addition to the fields marked with the ★, it is recommended that you include the middle initial for participants and the telephone numbers.

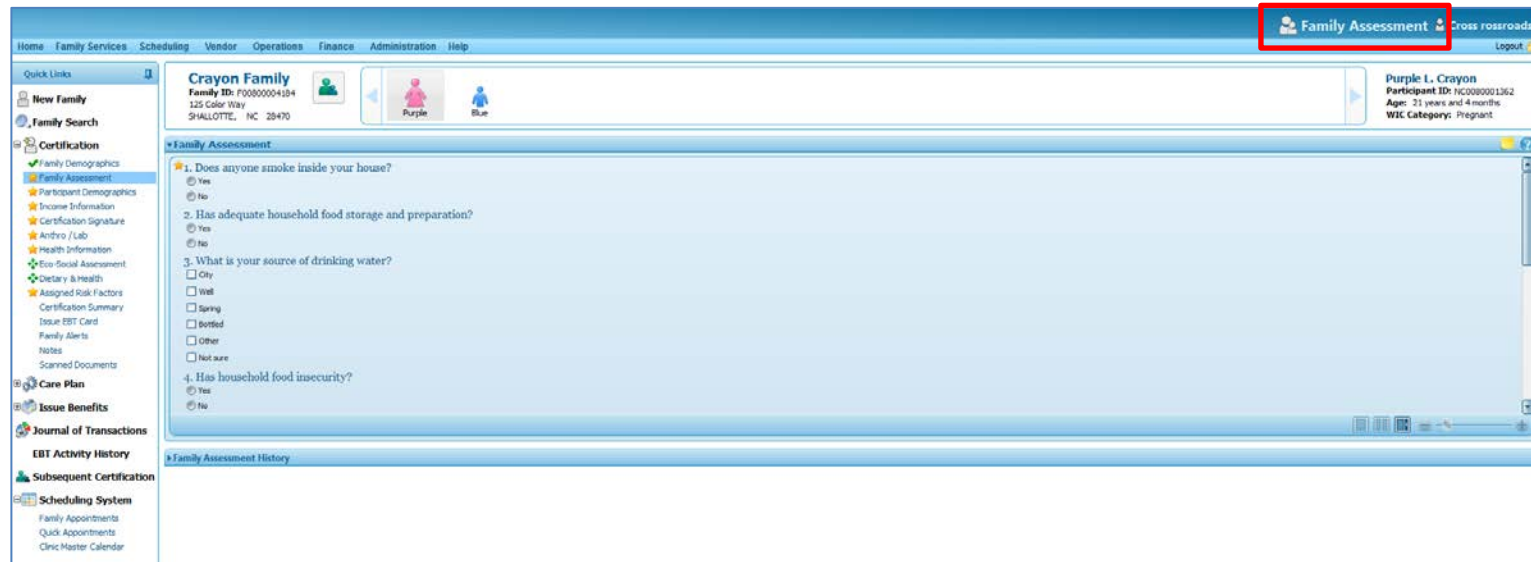
The screenshot shows the 'New Family' screen in the Crossroads system. The 'Family' section includes fields for Last Name (★), First Name (★), H.I., Suffix, Nickname, Maiden Name, Date of Birth (★), and Education Level. The 'Address' section includes Address (★), ZIP Code (★), City (★), State (★), and County (★). The 'Telephone Numbers' section is a table with columns for Telephone Number, Type, Primary, Do not call, Auto Dialer, Text, and Carrier. The 'Communication Options' section includes Language Read (★), Language Spoken (★), and Preferred Method of Contact (★). The 'Add Participant' section includes Last Name (★), First Name (★), H.I., Suffix, and Date of Birth (★). The 'Participant List' table shows two entries:

	Last Name	First Name	H.I.	Suffix	Date of Birth	Category	Gender	Foster Care Entry Date
X	Crayon	Purple	L		5/2/1996	P	Female	
X	Crayon	Blue	M		6/2/2013	C	Male	

3. The **Family Demographics** screen will most likely be completed by support staff.



4. The **Family Assessment** screen will most likely be completed by support staff.



5. All questions are required by NC Policy.

Note: Refer to the **Family Assessment Question Resource** for clarification on the questions.

6. The **Participant Demographics** screen will most likely be completed by support staff.
7. In addition to the fields marked with the ★, select **Declared** or **Observed** under **Race/Ethnicity**.
8. Complete **Link From** **CNDS** for each participant in the family.

The screenshot shows the 'Participant Demographics' screen for the 'Crayon Family'. The interface includes a navigation menu on the left with options like 'New Family', 'Family Search', 'Certification', 'Care Plan', and 'Issue Benefits'. The main content area is titled 'General Information' and contains several sections:

- Identity Information:** Fields for Last Name (Crayon), First Name (Purple), Suffix, and Hidden Name.
- Proof of Identification:** A dropdown menu set to 'Bill or account statement < 60 days'.
- Date of Birth:** 5/2/1996.
- Age:** 21 years and 4 months.
- WIC Category:** Pregnant woman.
- Race/Ethnicity:** A section with a red box around the 'Declared' and 'Observed' radio buttons. Below are checkboxes for various racial and ethnic groups: American Indian or Alaskan Native, Asian, Black or African American, White, and Native Hawaiian or Pacific Islander.
- Physical Presence:** Radio buttons for 'Yes' and 'No'.
- Incarcerated Status:** Radio buttons for 'Yes' and 'No'.
- Education:** A dropdown menu.
- Marital Status:** A dropdown menu.
- Employment Status:** A dropdown menu.

At the bottom right, there is a 'Link From CNDS' button and a 'Cancel' button, both highlighted with red boxes. The top right corner shows the user's name 'Purple L. Crayon' and their ID 'NC0080001362'.

9. The **Income Information** screen will most likely be completed by support staff.

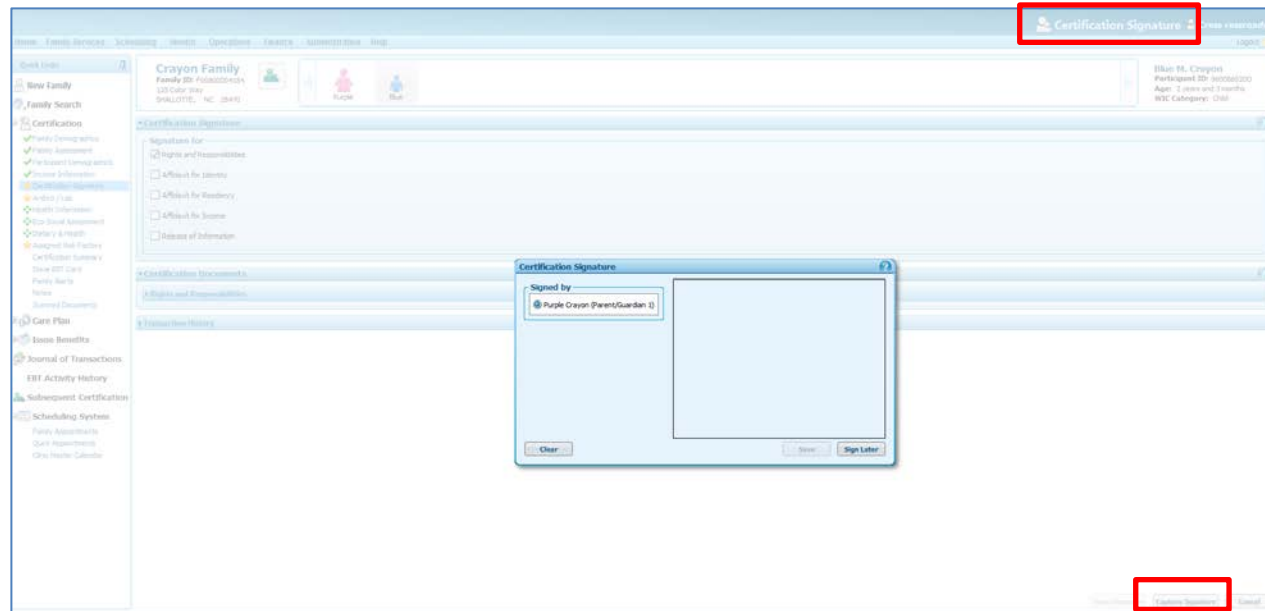
10. Enter the **Family Size** and **No. of Expected Infants** if the participant is pregnant.

11. In addition to the fields marked with the ★, enter a **Self-Declared Income Range** if the participant (family) is adjunctively eligible.

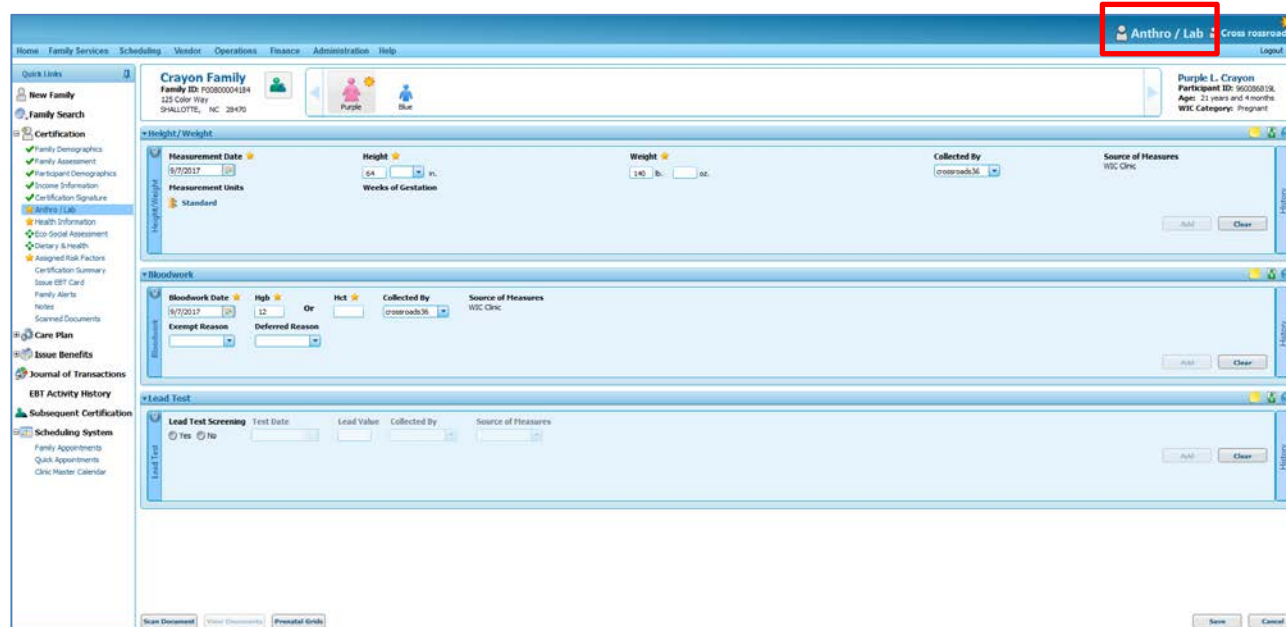
The screenshot shows the 'Income Information' screen for the 'Crayon Family'. The top navigation bar includes 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'. The 'Income Information' tab is selected and highlighted with a red box. The family details include 'Crayon Family', 'Family ID: F00800004184', '122 Cedar Way', 'SHALLOTTE, NC 28470', and 'Blue M. Crayon' (Participant ID: 9600868200, Age: 2 years and 3 months, WIC Category: Child). The 'Family Income' section shows 'Family Size' (1), 'No. of Expected Infants' (1), and 'Total Family Size' (2), all highlighted with red boxes. Below this is a table for 'Family - Adjunct. Participation' with columns for SNAP, Medicaid, TANF, and School Lunch. Two family members, 'Purple L. Crayon' and 'Blue H. Crayon', are listed. The 'Self-Declared Income' section has a dropdown menu for 'Self-Declared Income Range' set to '6,000.00 - 7,199.00', also highlighted with a red box. The 'Income Details' section is empty. The 'Income History' section shows a table with columns for Documentation Date, Total Family Size, Total Income, Total Income Frequency, Eligible, Zero Income Reason, Self-Declared Income, and Self-Declared Income Range. The bottom of the screen has 'Save' and 'Cancel' buttons.

12. The **Certification Signature** screen will most likely be completed by support staff.

13. Click **Capture Signature** so the participant may sign using the electronic signature pad.



14. The **Anthro/Lab** screen will most likely be completed by the medical office assistant (MOA).



15. The **Health Information** screen will be completed by the CPA.

16. North Carolina policy requires all data fields be completed. This includes updating **Immunizations Status** for infants and children.

This screenshot shows the 'Health Information' section of a software interface for a woman's pregnancy record. The page title is 'Health Information' and the user is logged in as 'rossroads'. The patient is identified as 'Crayon Family' with Family ID: F0280004134, 123 Color Way, SHALLOTTE, NC 28470. The woman is 'Purple L. Crayon', Participant ID: 9602868138, Age: 21 years and 4 months, WIC Category: Pregnant.

The 'Woman Health Information' section includes the following fields:

- Pre-Pregnancy:** Measurement Units (Standard), Pre-Pregnancy Weight (lb, oz), Pre-Pregnancy BMI, Cigarettes Per Day (Three Months Prior to Pregnancy, Today), Drinks Per Week (Three Months Prior to Pregnancy).
- Pregnancy:** Last Menstrual Period, Expected Delivery Date, First Prenatal Healthcare Visit Date, Date Last Seen By Physician, Number of Prenatal Healthcare Visits, Proof of Pregnancy, Dietary Supplement Taken Before Pregnancy, Medical Home, Currently Breastfeeding? (checked), Number of Fetuses this Pregnancy (Gravida, Para), Adequacy of Prenatal Care (No, Yes), Age at Conception, Inter-Conception Time in Months (No History).
- Health Information:** Pregnancy Induced Health Conditions, Health Conditions.

Buttons at the bottom include 'Scan Document', 'View Documents', 'Pregnancy History', 'Save', and 'Cancel'.

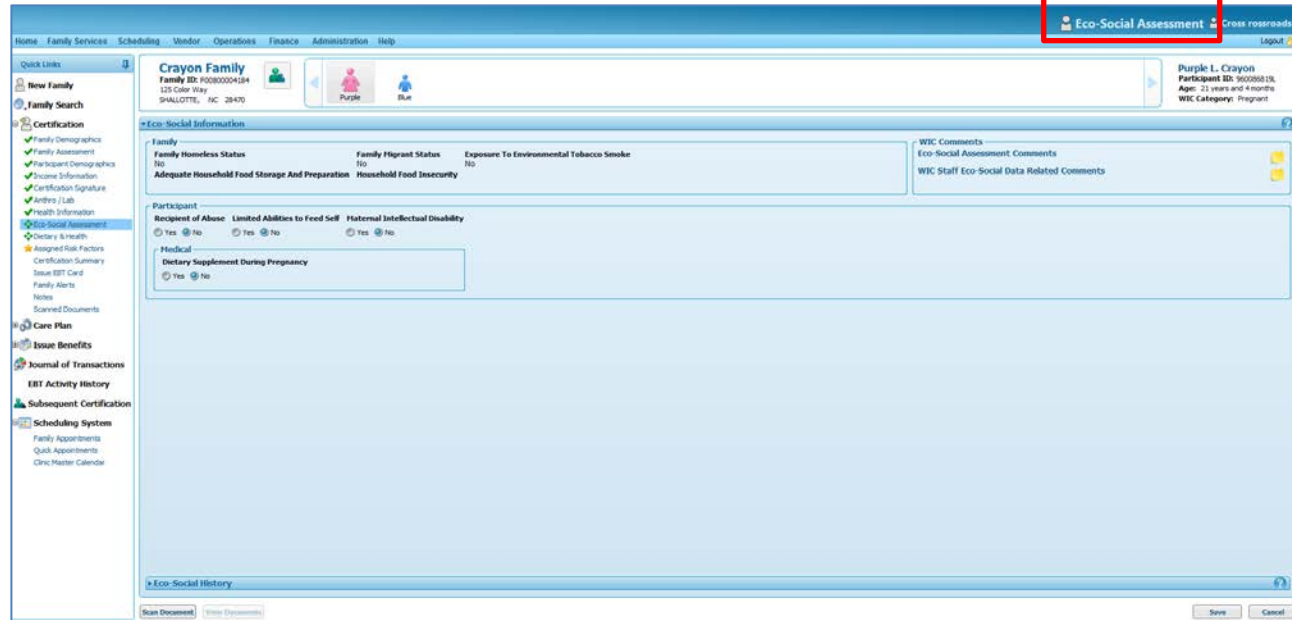
This screenshot shows the 'Infant / Child Health Information' section of the software interface. The patient is identified as 'Crayon Family' with Family ID: F0280004134, 123 Color Way, SHALLOTTE, NC 28470. The child is 'Blue M. Crayon', Participant ID: 9602868200, Age: 2 years and 3 months, WIC Category: Child.

The 'Infant / Child Health Information' section includes the following fields:

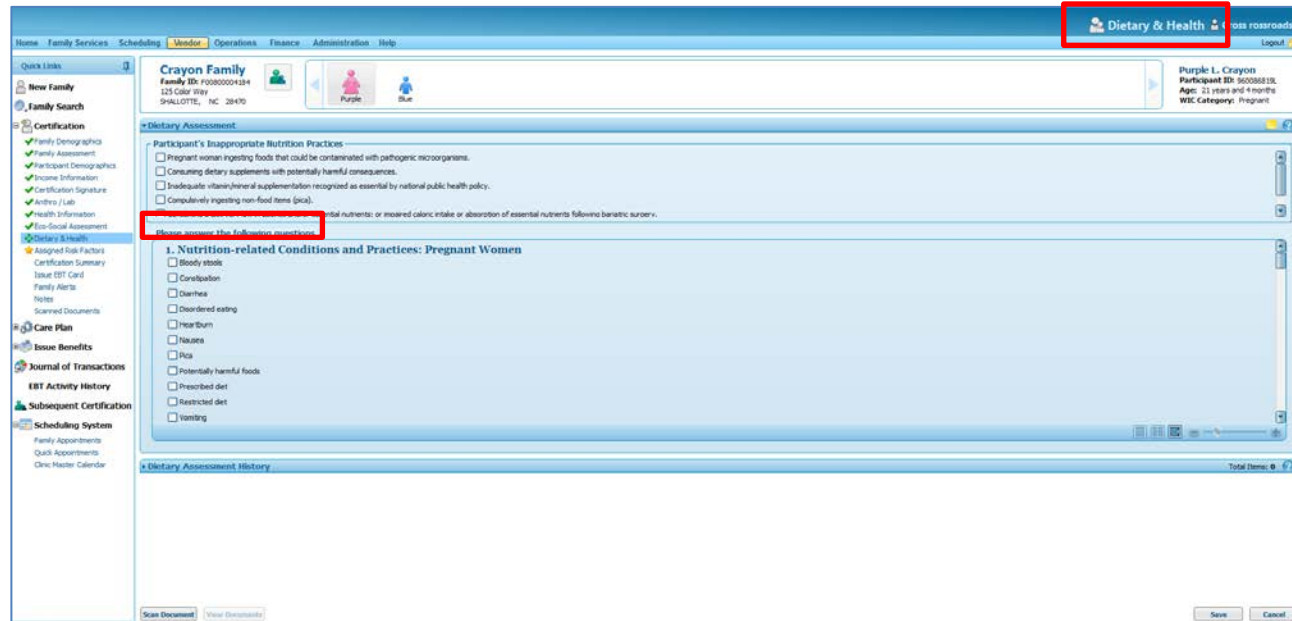
- Measurement Units:** Standard.
- Medical Health Conditions:** A large text area for recording conditions.
- Birth Information:** Birth Length (in), Birth Weight (lb, oz), Medical Home, Last Seen By Physician, Multiple Gestation (Yes, No, Unknown).
- Discharge Information:** Hospital Discharge Date, Hospital Discharge Weight (lb, oz), Weeks Gestation.

Buttons at the bottom include 'Scan Document', 'View Documents', 'Immunization Status' (highlighted with a red box), 'Save', and 'Cancel'.

17. The **Eco-Social Assessment** screen will be completed by the CPA.

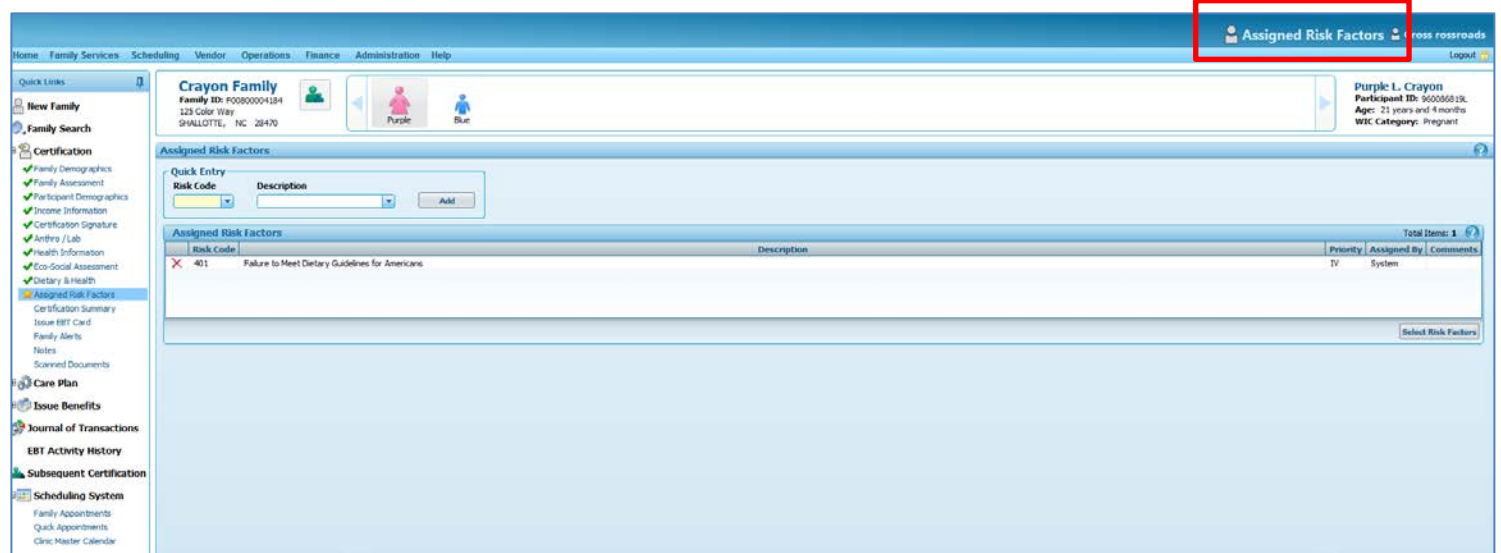


18. The **Dietary & Health** screen will be completed by the CPA.



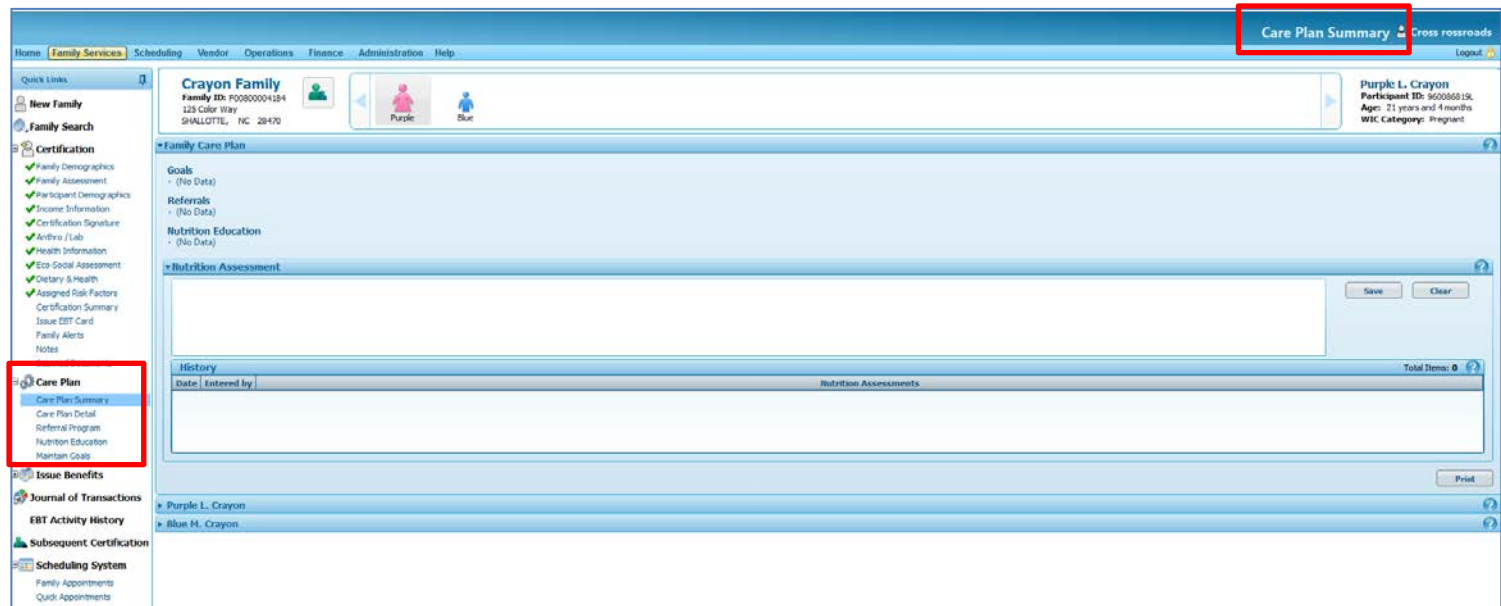
19. North Carolina policy recommends all questions be addressed.

20. The **Assigned Risk Factors** screen will be completed by the CPA.



21. The **Care Plan** screens will be completed by the CPA.

22. The entire **Care Plan** is required for Certification. The sections include:
- a. Goals
 - b. Nutrition Education
 - c. Referrals



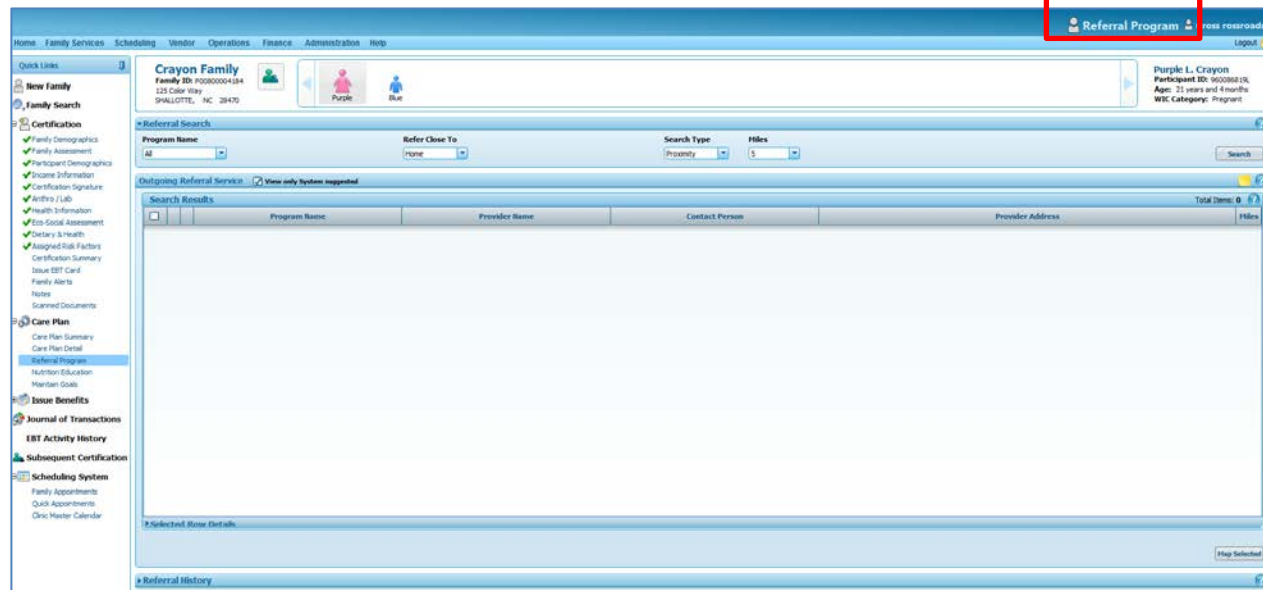
23. The **Maintain Goals** screen will be completed by the CPA.

The screenshot shows the 'Maintain Goals' interface. At the top right, the 'Maintain Goals' tab is highlighted with a red box. The main content area is titled 'Maintain Care Plan Goals' and includes a 'Family Goals' section with several checkboxes for tasks such as 'Assure immunizations are up-to-date', 'Avoid harmful foods/non-food items', 'Decrease TV/screen time', 'Eat healthy meals and snacks regularly', 'Eat more fruits and vegetables', 'Eat more whole-grain foods', 'Follow food safety recommendations', 'Follow weight gain/maintenance recommendations', 'Increase physical activity', 'Make smart drink choices', 'Plan, fix and eat meals and snacks as a family', 'Reduce exposure to second-hand smoke', 'Reduce lead exposure', 'Reduce exposure to pesticides', 'Take care of teeth and gums', and 'Take/give recommended vitamins/supplements'. Below this are sections for 'Individual Goals' for 'Purple L. Crayon' and 'Blue H. Crayon'. At the bottom right, there are 'Add Goals' and 'Add Free Form Goal' buttons.

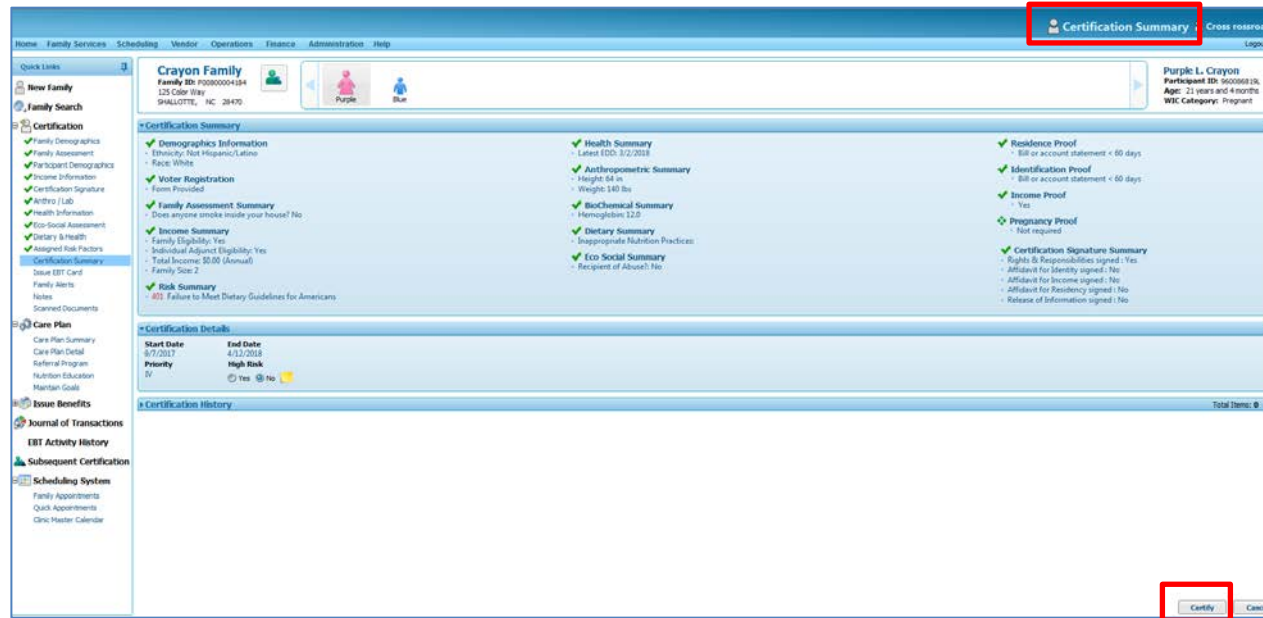
24. The **Nutrition Education** screen will be completed by the CPA.

The screenshot shows the 'Nutrition Education' interface. At the top right, the 'Nutrition Education' tab is highlighted with a red box. The main content area is titled 'Nutrition Education' and includes a 'Filter By' section with 'Family' and 'Individual' options. Below this is a table of 'Nutrition Education Topics' with columns for 'Topic', 'Method', 'All', 'Purple L. Crayon', and 'Blue H. Crayon'. The table lists various topics such as 'A - Immunizations', 'A - Tobacco, Alcohol and Illegal Drugs', 'Age-appropriate Portions', 'Be Healthy with Fruits and Veggies (wichealth)', 'Choose HyPlate to Build a Healthier Family (wichealth)', 'Eat Well - Spend Less (wichealth)', 'Eating Well on a Budget', 'Family Meals', 'Farm to Family: Keeping Food Safe (wichealth)', and 'Fast Food Choices'. At the bottom right, there are 'Schedule' and 'Complete' buttons.

25. The **Referral** screen will be completed by the CPA.



26. The **Certification Summary** screen will be reviewed by the CPA.



27. The **Certification Summary** screen provides an overview of the certification process. A green check mark (✓) indicates completion and a red x indicates incompleteness. When all required sections are completed, the CPA will click the Certify button.

28. The **Prescribe Food** screen will be completed by the CPA for each participant in the family.

Note: Please refer to the **Modifying Food Packages** resource for additional information.

The screenshot shows the 'Prescribe Food' interface for a pregnant participant. The top navigation bar includes 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'. A 'Prescribe Food' button is highlighted in a red box in the top right corner. The main content area displays the participant's information: Purple L. Crayon, Participant ID: 960288126, Age: 21 years and 4 months, WIC Category: Pregnant. Below this, there are fields for 'Food Prescription Date' (9/7/2017), 'WIC Category' (Pregnant), 'Family Issuance Day' (7), and 'Issuance Frequency' (3 Month(s)). A table lists 'Food Prescription Items' with columns for Category, Subcategory, Quantity, Category Max Quantity, and UOM. The items include Eggs, Breakfast Cereal, Legumes, Bread/Whole Grains, Fruit & Vegetable CUB, Juice - 48 oz, and MB - Fat Reduced. An 'Add Item to Food Prescription' section is visible at the bottom.

Category	Subcategory	Quantity	Category Max Quantity	UOM
Eggs	Egg Grade A Large White	1	1	Dozen
Breakfast Cereal	Breakfast Cereal	36	36	Ounces
Legumes	Beans/Peas or Peanut Etc	2	2	Containers
Bread/Whole Grains	W/ Bread or Whole Grains	16	16	Ounces
Fruit & Vegetable CUB	Fruit and Vegetables	\$11.00	\$11.00	\$\$\$
Juice - 48 oz	Juice 48 oz Flavored Conc.	2	2	Containers
MB - Fat Reduced	Skim Non Fat or 1% MB	5.50	5.50	Gallons

The screenshot shows the 'Prescribe Food' interface for a child participant. The top navigation bar is the same as the previous screenshot. A 'Prescribe Food' button is highlighted in a red box in the top right corner. The main content area displays the participant's information: Blake M. Crayon, Participant ID: 9602884200, Age: 2 years and 3 months, WIC Category: Child. Below this, there are fields for 'Food Prescription Date' (9/7/2017), 'WIC Category' (Child), 'Age Category' (2 yr to 5 yr), 'Family Issuance Day' (7), and 'Issuance Frequency' (3 Month(s)). A table lists 'Food Prescription Items' with columns for Category, Subcategory, Quantity, Category Max Quantity, and UOM. The items include Eggs, Breakfast Cereal, Legumes, Bread/Whole Grains, Fruit & Vegetable CUB, Juice 64, and MB - Fat Reduced. An 'Add Item to Food Prescription' section is visible at the bottom.

Category	Subcategory	Quantity	Category Max Quantity	UOM
Eggs	Egg Grade A Large White	1	1	Dozen
Breakfast Cereal	Breakfast Cereal	36	36	Ounces
Legumes	Beans/Peas or Peanut Etc	1	1	Containers
Bread/Whole Grains	W/ Bread or Whole Grains	32	32	Ounces
Fruit & Vegetable CUB	Fruit and Vegetables	\$8.00	\$8.00	\$\$\$
Juice 64	Juice 64 oz Flad	2	2	Containers
MB - Fat Reduced	Skim Non Fat or 1% MB	4	4	Gallons

29. The **Issue EBT Card** screen will most likely be completed by support staff.

Note: Please refer to the **Food Benefits Issuance** resource for additional information.

Home **Family Services** Scheduling Vendor Operations Finance Administration Help Issue EBT Card Cross roads Logout

Quick Links

New Family

Family Search

Certification

Family Demographics

Family Assessment

Participant Demographics

Income Information

Certification Signature

Arthro / Lab

Health Information

Eco-Social Assessment

Dietary & Health

Assigned Risk Factors

Certification Summary

Issue EBT Card

Family Alerts

Notes

Scanned Documents

Care Plan

Issue Benefits

Journal of Transactions

EBT Activity History

Subsequent Certification

Scheduling System

Family Appointments

Quick Appointments

Clinic Master Calendar

Crayon Family
Family ID: F00000004184
125 Color Way
SHALLOTTE, NC 28470

Blue M. Crayon
Participant ID: 9600868200
Age: 2 years and 3 months
WIC Category: Child

EBT Cards

Select Cardholder

Purple Crayon (Parent/Guardian)

Active EBT Cards

Cardholder Name	Card Number	Issued Date	Action	Action
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Total Items: 0

EBT Card History

Card Number	Cardholder Name	Issue Date	Deactivated Date	Deactivation Reason
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Total Items: 0

Data accurate as of 9/7/2017 3:44:28 PM

Save Cancel

30. The **Issue Food Instruments** screen will most likely be completed by support staff.

Note: Please refer to the **Food Benefits Issuance** resource for additional information.

Issue Food Instruments | Cross roads

Home | Family Services | Scheduling | Vendor | Operations | Finance | Administration | Help

Quick Links: New Family, Family Search, Certification, Care Plan, Issue Benefits, Journal of Transactions, Subsequent Certification, Scheduling System

Crayon Family
 Family ID: F00800004184
 125 Color Way
 SHALLOTTE, NC 28420

Purple L. Crayon
 Participant ID: 9600889105
 Age: 21 years and 4 months
 WIC Category: Pregnant

Issue Food Instruments

Configuration
 Family Issuance Day: 7 | Issuance Frequency: 3 Month(s)

Family Issuance Members

Category	Participant	Certification End Date	Sep	Oct	Nov	Total Items: 2
<input checked="" type="checkbox"/>	Pregnant Purple L. Crayon	4/12/2018	Full	Full	Full	Change Rx
<input checked="" type="checkbox"/>	Child Blue M. Crayon	9/6/2018	Full	Full	Full	Change Rx

***FDTS: 9/7/2017 - LDTS: 10/6/2017**

Food Category	Subcategory	Quantity	UOM
Milk - Fat Reduced	Skin/Non Fat or 1% Milk	9.50	Gallons
Fruit & Vegetable CMB	Fruit and Vegetables	\$19.00	\$\$\$
Juice 64	Juice 64-oz Fluid	2	Containers
Bread/Whole Grains	WW Bread or Whole Grains	48	Ounces
Eggs	Eggs Grade A Large White	2	Dozen
Breakfast Cereal	Breakfast Cereal	72	Ounces
Legumes	Beans/Peas or Peanut Str	3	Containers
Juice - 48 oz	Juice 48oz 8/12oz Conc	3	Containers

***FDTS: 10/7/2017 - LDTS: 11/6/2017**

Food Category	Subcategory	Quantity	UOM
Milk - Fat Reduced	Skin/Non Fat or 1% Milk	9.50	Gallons
Fruit & Vegetable CMB	Fruit and Vegetables	\$19.00	\$\$\$
Juice 64	Juice 64-oz Fluid	2	Containers
Bread/Whole Grains	WW Bread or Whole Grains	48	Ounces
Eggs	Eggs Grade A Large White	2	Dozen
Breakfast Cereal	Breakfast Cereal	72	Ounces
Legumes	Beans/Peas or Peanut Str	3	Containers
Juice - 48 oz	Juice 48oz 8/12oz Conc	3	Containers

***FDTS: 11/7/2017 - LDTS: 12/6/2017**

Food Category	Subcategory	Quantity	UOM
Milk - Fat Reduced	Skin/Non Fat or 1% Milk	9.50	Gallons
Fruit & Vegetable CMB	Fruit and Vegetables	\$19.00	\$\$\$
Juice 64	Juice 64-oz Fluid	2	Containers
Bread/Whole Grains	WW Bread or Whole Grains	48	Ounces
Eggs	Eggs Grade A Large White	2	Dozen
Breakfast Cereal	Breakfast Cereal	72	Ounces
Legumes	Beans/Peas or Peanut Str	3	Containers

Formula Wizard | Real Certification Due Notice | Issues | Cancel

Food Benefits Issuance Signature Confirmation

Have the family confirm receipt by signing electronically for checks 135266151 - 135290153 To sign later click the Sign Later button.

Food Benefits Signed/Received by:

- Purple Crayon (Parent/Guardian)
- Unassigned Staff

Signature Field | Signature Field | Signature Field | Change Rx

Clear | Sign | Sign Later

Status Message: EBT benefits were sent successfully.

Real Certification Due Notice | Issues | Cancel

Define | Session 1352.2 | 10/27 | 810-01 - Research - Shalotte | TAB | 100%

31. The **Quick Appointments** screen will most likely be completed by support staff.

Note: Please refer to the **Scheduling** resource for additional information.

Quick Appointments Crossroads

Home Family Services Scheduling Vendor Operations Finance Administration Help

Quick Links

- New Family
- Family Search
- Certification
 - Family Demographics
 - Family Assessment
 - Participant Demographics
 - Income Information
 - Certification Signature
 - Anthro / Lab
 - Health Information
 - Eco-Social Assessment
 - Dietary & Health
 - Assessment Role Factors
 - Certification Summary
 - Issue EBT Card
 - Family Alerts
 - Notes
 - Scanned Documents
- Care Plan
- Issue Benefits
 - Prescribe Food
 - Issue Food Instruments
 - Issue FM Food Instruments
 - Food Instrument List
 - Replace Current Benefits
 - Exchange/Increase Formula
- Journal of Transactions
- EBT Activity History
- Subsequent Certification
- Scheduling System
 - Family Appointments
 - Quick Appointments
 - Clinic Master Calendar

Crayon Family
 Family ID: F00800004184
 125 Color Way
 SHALLOTTE, NC 28470

Purple L. Crayon
 Participant ID: 960088810
 Age: 21 years and 4 months
 WIC Category: Pregnant

Search Options

Start Date: 11/20/2017
 End Date: 12/17/2017

Day of Week: S M T W Th F Sa

Preferred Language: English
 Preferred Time: Any

Clinic: 010-03 - Brunswick - Shalotte

Appointment Types	Individual	Appointment Type	Duration	High Risk	WIC Category	Status	Certification End Date
<input checked="" type="checkbox"/>	Blue M. Crayon	Food Benefit Issuance	15	<input type="checkbox"/>	Child	Active/Certified	9/8/2018
<input checked="" type="checkbox"/>	Blue M. Crayon	Nutrition Education - Individual	15	<input type="checkbox"/>	Child	Active/Certified	9/8/2018
<input checked="" type="checkbox"/>	Purple L. Crayon	Food Benefit Issuance	15	<input type="checkbox"/>	Pregnant	Active/Certified	4/12/2018
<input checked="" type="checkbox"/>	Purple L. Crayon	Nutrition Education - Individual	15	<input type="checkbox"/>	Pregnant	Active/Certified	4/12/2018

Go To Clinic Master Calendar