

Scanning Documents in Crossroads



When a participant record is opened in Crossroads, the button is available on the following screens:

- Income Information
- Anthro/Lab
- Health Information
- Eco-Social History
- Dietary & Health
- Assigned Risk Factors
- Prescribe Food: Medical Documentation

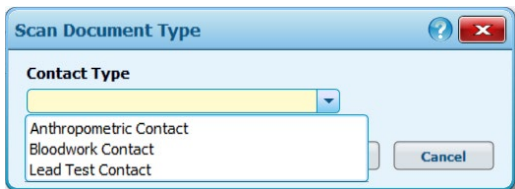
Crossroads has multi-page scanning capabilities. However, this functionality has some issues. North Carolina WIC agencies are instructed to scan and save documents **one page at a time**. Two-sided documents will need to be scanned and saved one page at a time.

Instructions for using the Scan Document function [Example: Anthro/Lab screen]

- 1) Verify that the scanner is turned on.
- 2) Click the Scan/Upload Document button located on the bottom left of the screen.

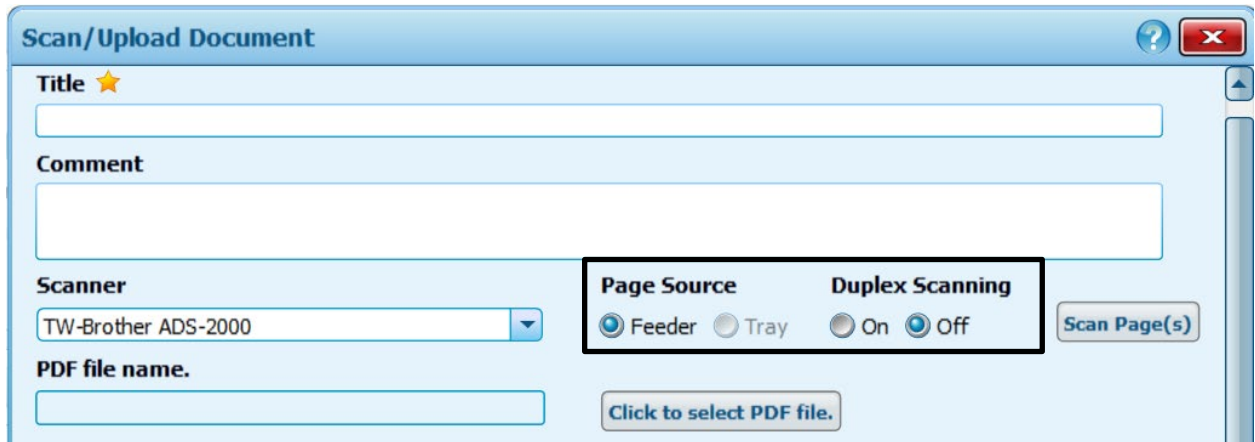


- 3) **Scan Document Type** popup appears on the Anthro/Lab screen: select **Contact Type** and click **OK**



- 4) **Scan/Upload Document** popup appears. The user can title the document before or after the scan. The Page Source should be kept on **Feeder** and **Duplex Scanning** should be **OFF**.

Scanning Documents in Crossroads



Scan/Upload Document

Title ★

Comment

Scanner: TW-Brother ADS-2000

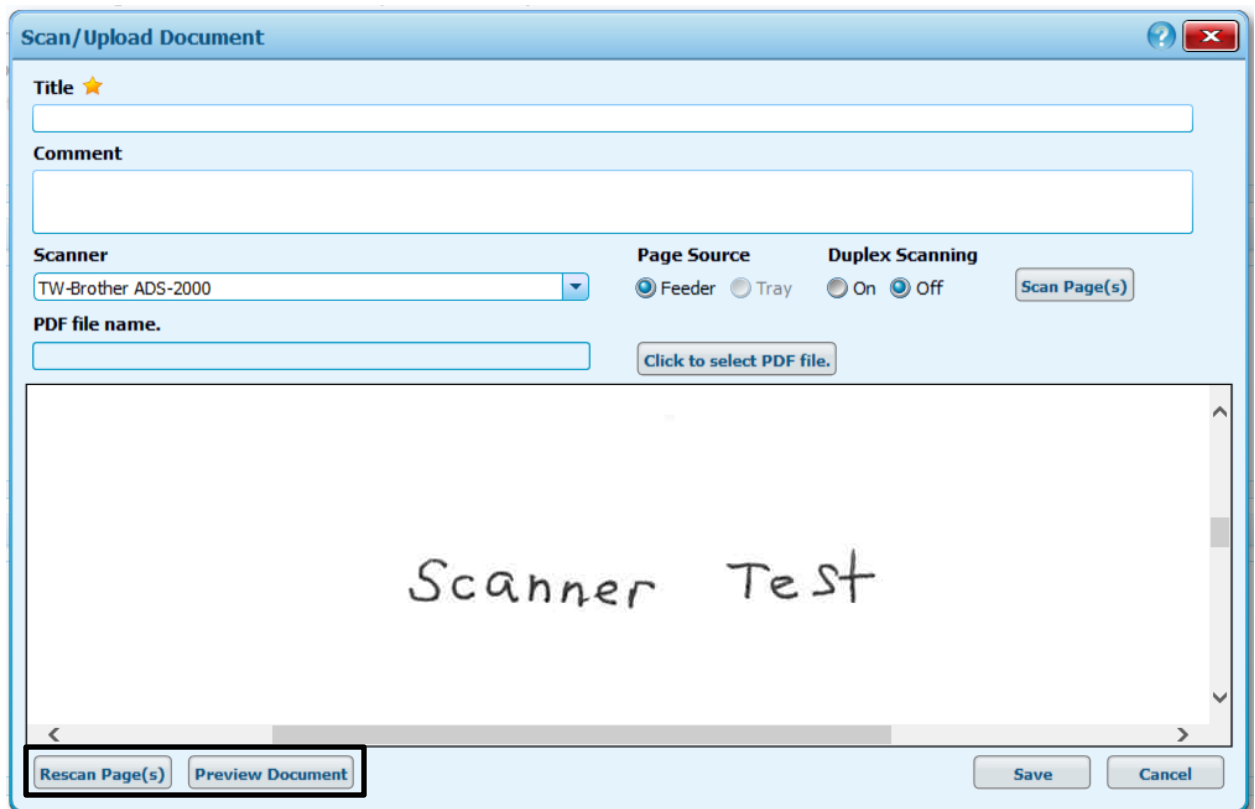
Page Source: Feeder Tray

Duplex Scanning: On Off

PDF file name. [Click to select PDF file.](#)

[Scan Page\(s\)](#)

- 5) Place the document (one page) in the scanner face down with the top of the page in the slot and click **Scan Page(s)**
- 6) After the document has been scanned, a popup screen opens showing the scanned document and giving options to Rescan Page(s), Preview Document, Save or Cancel.



Scan/Upload Document

Title ★

Comment

Scanner: TW-Brother ADS-2000

Page Source: Feeder Tray

Duplex Scanning: On Off

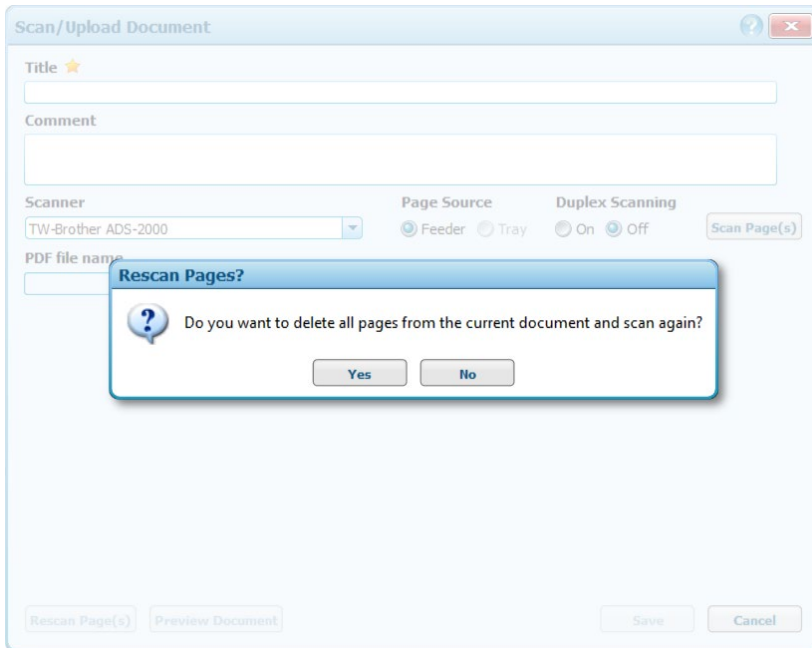
PDF file name. [Click to select PDF file.](#)

[Rescan Page\(s\)](#) [Preview Document](#) [Save](#) [Cancel](#)

Scanner Test

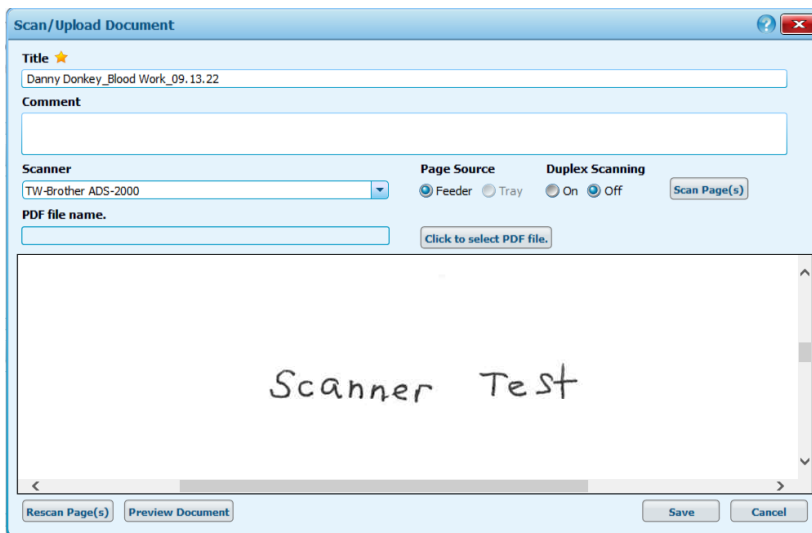
Scanning Documents in Crossroads

If Rescan Page(s) is selected, the following popup appears:



If the document needs to be rescanned, place the document in the scanner and Select Yes. Otherwise, Select No and Crossroads will return to the original scan.

7) Title the scanned document if not already done so and click Save.



8) Scan additional pages using steps #2-7. The same title as the original scan can be used with the addition of page numbers.

Scanning Documents in Crossroads

- Complete the starred fields on the Anthro/Lab screen and click **Save**. This will save the data on the screen **AND** the scanned documents.

NOTE: Crossroads will NOT save scanned documents on the Anthro/Lab or Dietary & Health screens *if data on the screen is not added or changed*. The user can either change something on the screen or scan from another screen, such as Health Information or Eco-Social History.

- After the document has been scanned and saved, the user can view it on the Anthro/Lab screen [in this example] by clicking on the **View Documents** button located on the lower left of the screen next to the **Scan/Upload Document** button.



or by selecting the **Scanned Documents** quick link under **Certification**

To view the document under **Scanned Documents**, click on the magnifying glass located on the right-hand side under the title **View**.

Scanned Documents					Total Items: 2
Title	Scanned By	Document Type	Date	View	
Blood Test Result 09.09.22	crossroads36	Height/Weight Document	9/9/2022		
Danny Donkey_Blood Work_09.13.22	crossroads36	Bloodwork Document	9/13/2022		

Document List					Total Items: 1
Title	Date Time Scanned	Scanned By	Comment		
Danny Donkey_Blood Work_09.13.22	9/13/2022 12:40:10 PM	crossroads36			Export to PDF

IMPORTANT: If scanning on a screen that doesn't have starred fields, be sure to click **Save** before leaving that screen. Otherwise, the scanned document will not be saved. There is no prompt to save the screen.