


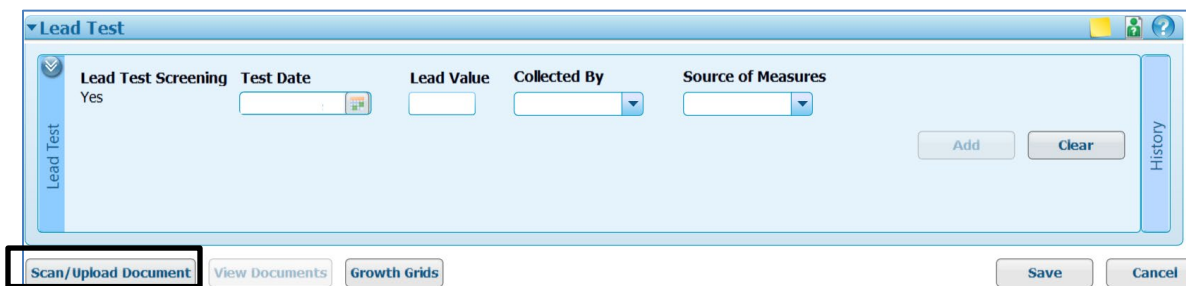
Uploading PDF Documents in Crossroads

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

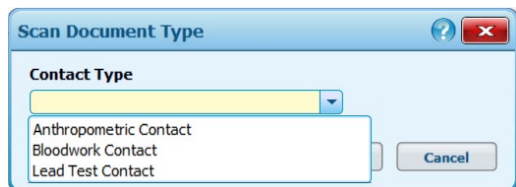
- Income Information
- Anthro/Lab
- Health Information
- Eco-Social History
- Dietary & Health
- Assigned Risk Factors
- Prescribe Food: Medical Documentation

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

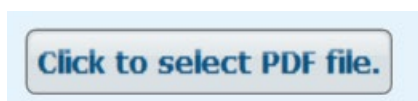
- 1) Verify that the document is saved on the computer as a **PDF**.
- 2) Click the **Scan/Upload Document** button located on the bottom left of the screen.



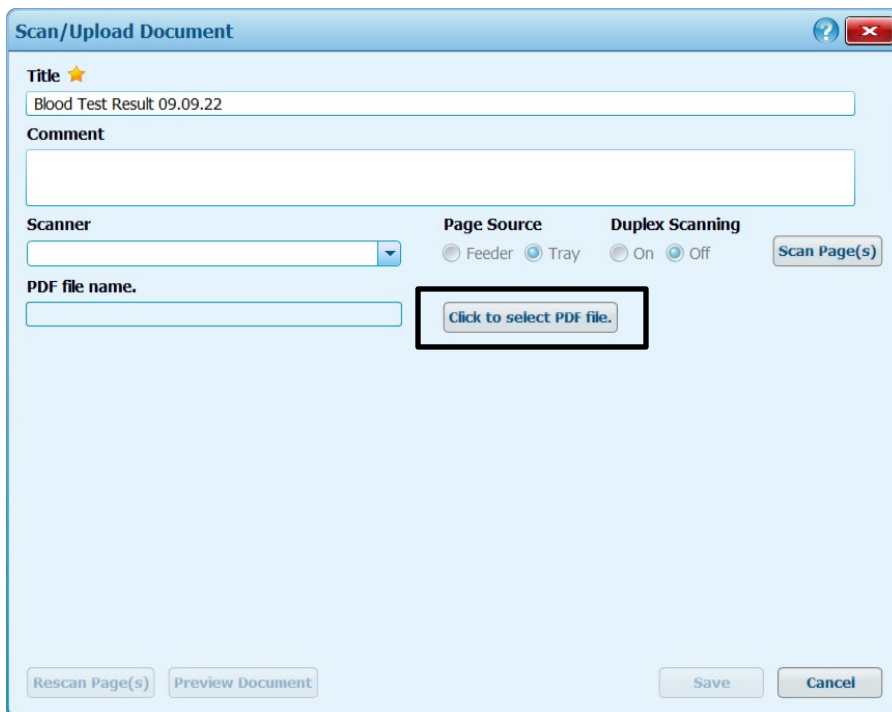
- 3) **Scan Document Type** popup appears on the Anthro/Lab screen: select **Contact Type** and click **OK**



- 4) **Scan/Upload Document** popup appears.
Title the document and ignore scanner settings. Next select:

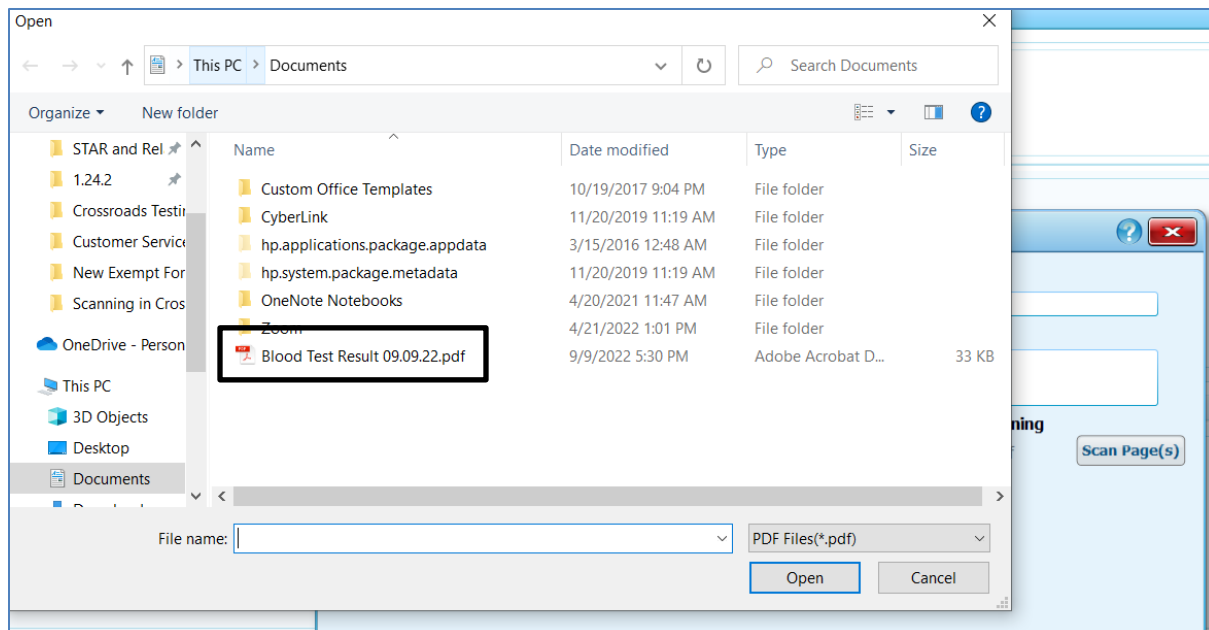


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5) File Explorer will open.

Select the appropriate PDF: in this example, "Blood Test Result 09.09.22" is selected



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- 6) After the document has been uploaded, a popup screen opens showing the contents of the selected PDF and options to Preview Document, Save or Cancel.

The screenshot shows a 'Scan/Upload Document' dialog box. The title bar includes a help icon and a close button. The main area contains the following elements:

- Title** (with a star icon): A text input field containing 'Blood Test Result 09.09.22'.
- Comment**: A large empty text area.
- Scanner**: A dropdown menu.
- Page Source**: Radio buttons for 'Feeder' and 'Tray' (selected).
- Duplex Scanning**: Radio buttons for 'On' and 'Off' (selected).
- Scan Page(s)**: A button.
- PDF file name.**: A text input field containing 'Blood Test Result 09.09.22.pdf' and a 'Click to select PDF file.' button.
- Preview Area**: A large window showing the scanned document content, which includes the text 'Hgb 12.1'.
- Bottom Buttons**: A row of buttons including 'Rescan Page(s)', 'Preview Document', 'Save', and 'Cancel'.

- 7) If the correct document is loaded, then click **Save**. Otherwise, select Cancel and start the process over choosing the correct document.

- 8) 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 uploaded documents on the Anthro/Lab or Dietary & Health screens if data on the screen is not added or changed. This is a known feature of Crossroads. If uploading cannot take place while working and saving initially on these screens, then the user can either change something on the screen or upload from another screen, such as Health Information or Eco-Social History.

- 9) After the document has been uploaded 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.

Uploading PDF Documents in Crossroads



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**.


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
 - Assigned Risk Factors
 - Certification Summary
 - Issue EBT Card
 - Family Alerts
 - Notes
 - Scanned Documents

Donkey Family

Family ID: F00600004703

471 Farm Lane
BOLIVIA, NC 28422




Deidre
Danny

Danny T. Donkey

Participant ID: NC0060002165

Age: 4 months
WIC Category: Infant

Scanned Documents Total Items: 1

| Title | Scanned By | Document Type | Date | View |
|----------------------------|--------------|-----------------------|----------|---|
| Blood Test Result 09.09.22 | crossroads36 | Height/Weight Documei | 9/9/2022 |  |

Scanned Documents

Blood Test Result 09.09.22

Scanned Document List

Hgb 12.1

Document List Total Items: 1

| Title | Date Time Scanned | Scanned By | Comment | |
|----------------------------|---------------------|--------------|---------|---------------|
| Blood Test Result 09.09.22 | 9/9/2022 5:43:53 PM | crossroads36 | | Export to PDF |

Cancel

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