

WIC Birthday Card Mailings

This resource provides an overview and step-by-step instructions for operationalizing WIC Birthday Card mailings to increase WIC child retention.

The age-specific birthday cards include bold colors and fun pictures intended to help families celebrate an existing milestone, while also reminding them about the benefits of WIC. The inside of the card contains messaging about the core functions of WIC and a reminder about eligibility.



WIC Birthday Cards:

- Are available for ages 1 to 4
- Are available in English and Spanish versions
- Include a blank envelope for each card
- Are designed for customization at the local level

Instructions for Mailing WIC Birthday Cards

Crossroads cannot generate a report that lists participants by birth date and address. Local agency staff must utilize the family search feature in Crossroads to locate children with recent and upcoming birthdays and obtain addresses.

Large agencies must consider the time and resources needed to operationalize mailings. Consider beginning birthday card mailings targeted to a specific age group. For example, investigate participation trends and mail birthday cards to the participants in the age group demonstrating the greatest decline in participation. Local agencies need to determine the best approach to batch mailings based on clinic size, staffing and workflow.

Local agency staff need to determine the frequency of the mailings (e.g. daily, weekly, monthly, every other month).

In this scenario, the Local Agency decides to do a weekly mailing for all 1-4-year-old participants with birthdays between 11/1 and 11/8.

Step 1: Navigate to the **Family Search** feature. Select the appropriate **Clinic** and check the **Participant** search type.

A screenshot of the 'Family Search' interface in the Crossroads system. The interface has a blue header with 'Family Search' and 'Crossroads' logos. Below the header is a navigation menu with 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'. The main content area is titled 'Search Criteria' and contains several search fields and checkboxes. The 'Search Location' section has three radio buttons: 'State-Wide', 'Local Agency', and 'Clinic'. The 'Clinic' radio button is selected and highlighted with a red box. Below it, a dropdown menu shows '010-01 - Brunswick - B'. The 'Search Type' section has three checkboxes: 'Family', 'Participant', and 'Caretaker'. The 'Participant' checkbox is checked and highlighted with a red box. Other search criteria include 'Family ID', 'Last Name', 'First Name', 'M.I.', 'Telephone Number', 'Date of Birth' (with a calendar icon and '11/1/2017' selected), and 'Participant ID'. There are also checkboxes for 'Medicaid Number' and 'Online Applicant Only'. At the bottom right, there are 'Search' and 'Clear Criteria' buttons.

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Step 2: Navigate to the **Date of Birth** field.

Check the box next to **Date of Birth** to show only those participants with that exact birthdate. For example, if staff would like to pull records for all children turning two years old on 11/1, staff would enter 11/1/17.

The screenshot shows the 'Family Search' interface. The 'Search Criteria' section is highlighted. The 'Date of Birth' field is checked and contains '11/1/2017'. The 'Search' button is also highlighted.

Search Location	Search Type	Family ID	Last Name	First Name	M.I.	Telephone Number	Date of Birth	Participant ID
<input type="radio"/> State-Wide	<input type="checkbox"/> Family	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input checked="" type="checkbox"/> 11/1/2017	<input type="text"/>
<input type="radio"/> Local Agency	<input checked="" type="checkbox"/> Participant	Medicaid Number	<input type="checkbox"/> Online Applicant Only					
<input checked="" type="radio"/> Clinic	<input type="checkbox"/> Caretaker	<input type="text"/>						
010-01 - Brunswick - B	<input type="checkbox"/> Proxy							

Step 3: Click the **Search button**. The results will populate with children that fall within the specified search criteria. In some cases, the participants may be “active”. In these instances, sending a birthday card is a great way to acknowledge their continued participation on the program. In other cases, you may see that someone is no longer certified. Consider investigating the participant record – it may be a good opportunity to send a card as a reminder of WIC services and benefits.

Step 4: After conducting a search, click **Selected Row Details**, and a drop down of information will appear. This is one place where you can view the mailing address.

The screenshot shows the 'Search Results' page. A table lists search results. The first row is selected, and its details are expanded below. The 'Mailing Address' field is highlighted in red.

Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Category	Medicaid Number	Status	Certification End Date	Parent/Guardian 1 Name
F00600004558	960137807N	Lemon	Yellow		11/1/2017	C		Active/Certified	10/29/2020	Honey Lemon

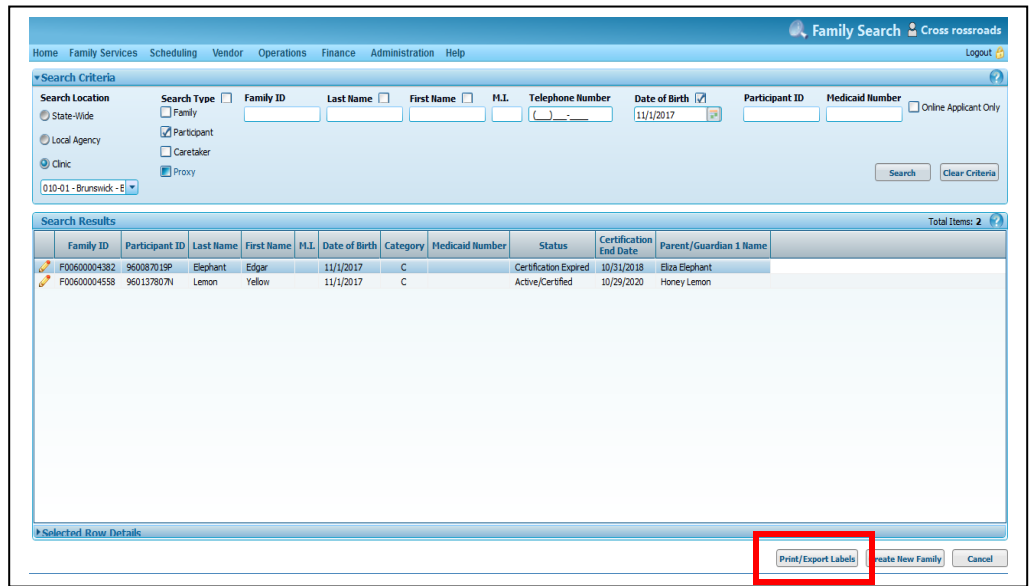
Name Yellow Lemon	Mailing Address 100 Grove Street, RALEIGH, NC 27609	Parent/Guardian1 Honey M. Lemon	Caretaker	Family Issuance Day 17th
Telephone Numbers Cellular: 919-555-1111		Parent/Guardian2	Next Pickup Date 1/17/2020	
Family Members P Honey M. Lemon C Yellow Lemon C Lulu A. Lemon	Appointments			

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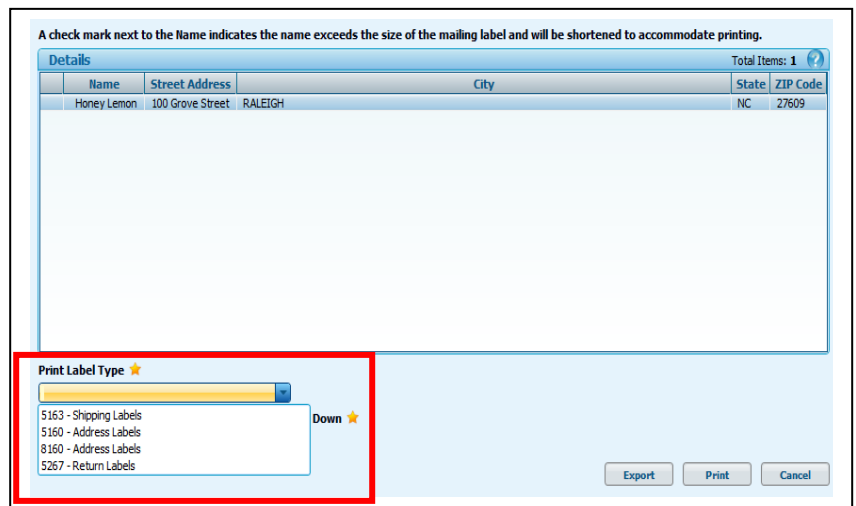
Step 5: There are three options for generating address labels in Crossroads for the birthday cards.

1. Batch print labels using the Print/Export Labels feature. From the Family Search Screen, click the **Print/Export Labels** button.

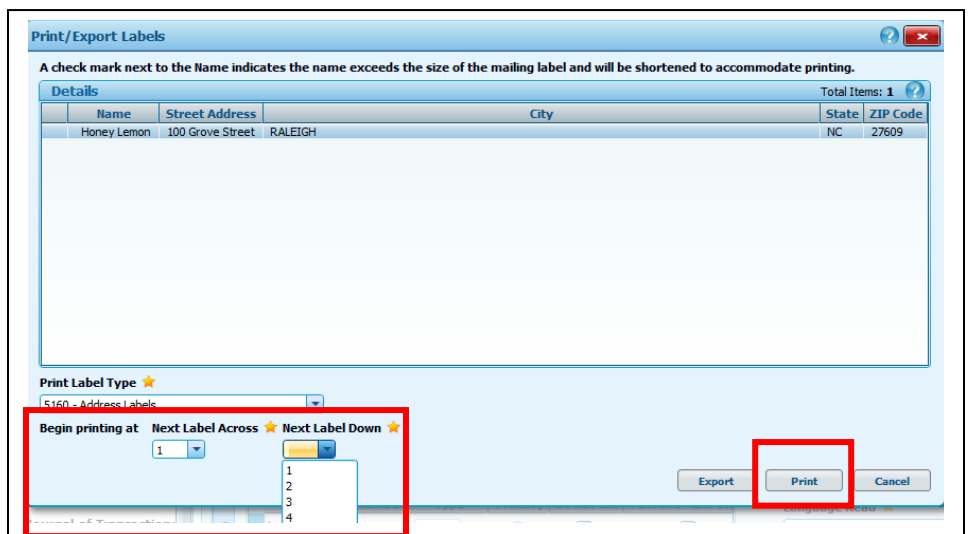
A mailing label addressed to the Parent/Guardian 1 will be printed for each participant generated in the search.



Select **Print Label Type** (the type of address label template being used).



Select the **Next Label Across** number (the column of the address label sheet where you want printing to start). Select the **Next Label Down** number (the row of the address label sheet where you want printing to start). If you have a full label sheet, select 1 for both fields. Load the labels into the printer and click **Print**.



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- Print labels individually for each participant. Go into the participant record. From the **Family Demographics** screen, click the **Print/Export Labels** button to generate an address label.

Lemon Family
Family ID: F00600004558
100 Grove Street
RALEIGH, NC 27609

Yellow Lemon
Participant ID: 960137807N
Age: 1 year and 11 months
WIC Category: Child

General Information Foster Family

Participant

Last Name ★
Lemon

First Name ★
Honey

M.I.
M

Suffix **Nickname** **Maiden Name**

Proof of Identification ★
Photo ID (current)

Date of Birth
11/30/1989

Marital Status **Education Level**

Address ★
100 Grove Street

ZIP Code ★ **City** ★ **State** ★ **County** ★
27609 RALEIGH NC WAKE

Proof of Residence ★
Bill or account statement < 60 days

Homeless / Incarcerated Status **Migrant Status**

Telephone Numbers Total Items: 1

Telephone Number	Type	Primary	Do not call	Text and Auto Dialer
919-555-1111	Cellular	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Voter Registration ★
Registered

Language Read ★
English

Interpreter Sign Language Interpreter

Email Address

Confidentiality

Military Status

Language Spoken ★
English

Preferred Method of Contact ★
Phone

Print/Export Labels

Follow the instructions listed in step 5 (page 3) to select the **Print Label Type, Next Label Across** and **Next Label Down** fields. Load labels into the printer and click **Print**.

- Address envelopes by hand. While time consuming, addressing envelopes by hand provides a personal touch and may decrease the likelihood that the card is thrown away with other junk mail.

Note: In order to capture all children ages 1-4 with a birthday on 11/1, complete steps 1-5 for each of the following dates of birth: 11/1/2018, 11/1/2017, 11/1/2016, and 11/1/2015. Furthermore, repeat the process for all dates between 11/1 and 11/8.