CNDS in Crossroads

CNDS Facts

Crossroads interfaces with the North Carolina Common Name Database Services system (CNDS). The CNDS system provides individuals with a unique identifying number, separate from their social security number. The CNDS ID is used state-wide by programs such as Medicaid, SNAP and Work First. The CNDS ID will be the participant ID used in Crossroads. A link with CNDS is made from the Participant Demographics screen.

If a WIC participant already has a CNDS ID provided by Medicaid, SNAP or Work First:

• The participant’s first name, last name, gender and date of birth (DOB) in Crossroads must match the data in CNDS.
• WIC staff cannot change first name, last name, gender or DOB of the participant even if the data is incorrect.
• Attempting to change these data fields will result in the following error messages:
  o “Changes not accepted”
  o “CNDS and Crossroads don’t match DOB”
• The participant must contact Medicaid to report a name change, inaccurate gender or inaccurate DOB.
• Race and ethnicity data can always be updated by WIC staff.
• When Select is clicked from the CNDS Person Search Results pop-up box, the data entered into Crossroads will change to the data coming from CNDS if they do not match.

If WIC is the first agency to assign the participant’s CNDS ID:

• WIC staff can change the first name, last name, gender or DOB of the participant in Crossroads up until the Certify button is clicked (any time the participant’s status is “applicant”).
• After the participant is certified (status is “active/certified”), only race and ethnicity can be updated by WIC staff.

“Refresh from CNDS” button:

• Button is available on the Patient Demographics screen, if WIC participant already has a CNDS number.
• When button is selected, data elements (first/last name, gender, DOB, race/ethnicity) are transferred from CNDS to Crossroads.
• Best Practice: Click Refresh from CNDS button every time a participant is seen at WIC to ensure data is up-to-date.
CNDS Person Search Results:

- **Participant Demographics** is the default and results are displayed automatically. If used, there is the potential to return many records.
- Click the **Select** button next to the matching CNDS ID for the participant.
- If no matches are returned OR the participant is not found in the search results, ask probing questions such as:
  - Did you change your name recently?
  - What is your maiden name?
- Use these answers and HSIS Screen 95 or NC FAST to search for the participant’s current Medicaid ID.

- Selecting the **CNDS ID** radio button, entering a CNDS ID number and clicking **Search** will return one record if a match exists.
- **Best practice** is to search by **CNDS ID** whenever possible, as this is the same number as the participant’s current Medicaid ID.
- Make every effort to find a match.
- If the participant still cannot be found, use **Create in CNDS**.
**CNDS Scenarios**

Some participants will already have a CNDS ID and others will not. The first three scenarios describe assigning a CNDS ID for the first time. Screenshots are shown.

**Scenario 1:** Participant does not have a CNDS ID.

**Scenario 2:** Participant does have a CNDS ID but it is NOT currently linked to the Crossroads WIC record.

**Scenario 3:** Participant does have a CNDS ID and it IS currently linked to the Crossroads WIC record.

---

**Scenario 1: Participant does not have a CNDS ID**

**NOTE:** Participant’s ID is NC followed by a series of numbers when the application is started. This is a temporary ID. This will change to the **CNDS ID** after the following steps are completed.

1. Complete the **Family Demographics** and **Family Assessment** screens.
2. Navigate to **Participant Demographics**.
3. Complete the **Race/Ethnicity** fields and any other starred fields that are incomplete.
4. Click **Link from CNDS** button.

---

5. **CNDS Person Search Results** appears. Since the participant does not have a CNDS ID (has never had Medicaid, Food Stamps or Work First) the results container is empty.
6. Click the **Create in CNDS** button.
7. **Create Person in CNDS?** pop-up appears.

8. Click **OK**.

9. Status Message is received: “Participant [Name] was saved successfully.”

10. The participant ID is now the CNDS number.

11. Click **Save**.

12. Crossroads navigates automatically to the **Income Information** screen.
Scenario 2: Participant has a CNDS ID but it is not currently linked to the Crossroads WIC record.

**NOTE:** Participant’s ID is a temporary ID. This will change to the CNDS after the following steps are completed.

1. Complete the Family Demographics and Family Assessment screens.
2. Navigate to Participant Demographics.
3. Complete the Race/Ethnicity fields and any other starred fields that are incomplete.
4. Click Link from CNDS button.

5. CNDS Person Search Results appears. Participant Demographics is the default and results are displayed automatically. In this case, the participant is listed. Verify DOB and other data elements.

6. Click the Select button next to the matching CNDS ID for the participant.

7. **Link CNDS Person?** pop-up appears. Select OK.
8. **Status Message** is received: “Participant [Name] is linked to CNDS successfully. All demographic values were replaced with CNDS values.”

9. Click Save.
10. Crossroads navigates automatically to the Income Information screen.
Scenario 3: Participant does have a CNDS ID and it IS currently linked to the Crossroads WIC record.

NOTE: Participant’s ID is also their CNDS ID.

1. Complete the Family Demographics and Family Assessment screens.
2. Navigate to Participant Demographics.
3. Complete the Race/Ethnicity fields and any other starred fields that are incomplete.
4. Click Refresh from CNDS button.
5. Status Message is received: “CNDS information was copied successfully.”
6. Click Save.
7. Crossroads navigates automatically to the Income Information screen.
In scenarios 4 and 5, the WIC participant has CNDS X assigned in Crossroads, but has a current Medicaid card with CNDS Y. Two different sets of messages may be received after selecting Refresh from CNDS. Screenshots are not shown for these scenarios.

**Scenario 4: Refresh from CNDS – Pass**
WIC participant has 2 CNDS numbers: X in Crossroads and Y on their current Medicaid card.
User selects Refresh from CNDS and system refreshes, no errors received.
(Status Message = “CNDS information was copied successfully.”)

**AND**

**Scenario 5: Refresh from CNDS – Fail**
WIC participant has 2 CNDS numbers: X in Crossroads and Y on their current Medicaid card.
User selects Refresh from CNDS and “Refresh from CNDS Failed” or “CNDS ID not found” message appears.

**Action for BOTH scenarios (4 & 5):**
User needs to reassign the Crossroads CNDS ID to the current Medicaid ID.
Steps to take in Crossroads:

1. Choose Link From CNDS button on Participant Demographics screen.
2. CNDS Person Search Results container displays.
   a. Select the row that matches the CNDS ID on the current Medicaid card
      OR (if no results or matches are returned)
   b. Select the CNDS ID radio button, enter a verified CNDS ID into the field and select Search.
   c. Select the row that matches the CNDS ID on the current Medicaid card
3. Link CNDS Person? confirmation appears. Select OK.
4. Do you wish to merge? confirmation appears. Select No.

**Result:**
Application returns to Participant Demographics screen.
Participant ID in upper right hand corner populates with correct CNDS.
Status Message is received: “Participant [Name] is linked to CNDS successfully.
All demographic values were replaced with CNDS values.”
The last two scenarios (6 and 7) describe steps to take if an incorrect date of birth or gender is found in Crossroads. No screenshots are shown for these scenarios.

**Scenario 6: Incorrect Date of Birth (DOB) or Gender in Crossroads - participant is NOT certified**

If the WIC participant is **not certified** (has a status of “applicant”), their Crossroads DOB or gender is incorrect, and their CNDS DOB or gender is correct: use **Refresh CNDS** to overwrite all the fields including DOB and/or gender. Steps to take in Crossroads:

1. Navigate to the **Participant Demographics** screen.
2. Correct the participant’s Gender or DOB.
3. Select **Save**.
4. Select the **Link from CNDS** button.
5. Select the correct CNDS from the **Search Results** container.
6. Finish certification.

**Scenario 7: Incorrect DOB or Gender in Crossroads - participant IS certified**

If the WIC participant is **certified** (has a status of “active/certified”) or **Refresh from CNDS** is greyed out, the user needs to create a new record with the correct DOB and/or gender. Steps to take in Crossroads:

1. **Terminate the client with the incorrect DOB/gender**
   a. Navigate to the **Certification Summary** screen and select **Terminate Certification**.
   b. Select termination reason “duplicate record identified.”
   c. Select **Save**. Participant status changes to “Certification Terminated” and the Status Message “[NAME’s] current certification was terminated successfully. Benefits issuance will be prevented” appears.
   d. Select the **Generate New ID** button. **NOTE:** at this time, only a CPA has access to the **Generate New ID** button.
   e. **Replace CNDS ID** validation appears: “Are you sure you want to replace existing Participant ID with ##00?” Select **Yes**.
   f. Crossroads changes the CNDS ID to the same CNDS# but with “00” at the end.

2. **Add a new client with the correct DOB/gender:**
   a. Create a new record with the correct DOB. **NOTE:** If in adding the new record to the family a **Possible Duplicate** container appears matching the new record with the terminated client, select **Create New Client**.
   b. Navigate to the **Participant Demographics** screen.
   c. Select the **Link from CNDS** button.
   d. Select the correct CNDS from the **Search Results** container.
   e. Finish certification.
3. **Link the terminated client to the new client for documentation purposes:**
   a. Navigate to Operations > Search Dual Participation.
   b. Link the terminated client to the client with the correct DOB or gender.

**NOTE:** at this time, Step 3 is not functioning. NSB will inform you when this functionality becomes available. Until this time, add an alert to the participant’s record indicating that there is a duplicate (terminated) record in the family and the reason why (incorrect DOB, incorrect gender).