Crossroads Guidance

Contents

Crossroads Guidance .................................................................................................................. 1
Overview ...................................................................................................................................... 2
New Family and Family Search ................................................................................................. 3
Family Demographics ................................................................................................................ 3
Family Assessment .................................................................................................................... 4
Participant Demographics ......................................................................................................... 4
Income ........................................................................................................................................ 5
Anthro/Lab .................................................................................................................................. 6
Health Information ..................................................................................................................... 8
Assigned Risk ............................................................................................................................ 10
Certification Summary ............................................................................................................... 13
Scanning ...................................................................................................................................... 13
Care Plan ..................................................................................................................................... 13
Referrals ....................................................................................................................................... 14
Nutrition Education .................................................................................................................... 14
Prescribe Food ............................................................................................................................ 15
Issue Food Instruments (FIs) and Manual Food Instruments (MFIs) ........................................... 18
Return Formula ............................................................................................................................ 20
Subsequent Certification ............................................................................................................... 21
Scheduling .................................................................................................................................... 22
Breastfeeding Care Plan and Supplies ......................................................................................... 23
Inventory ...................................................................................................................................... 24
Reports ......................................................................................................................................... 24
Notifications ................................................................................................................................. 25
Overview

This guidance document replaces the Crossroads Rollout Guidance document. Topics are arranged in an order that follows the Crossroads Quick Links list. Topic pages may include all or some of the following:

- Crossroads resources that are available at http://www.nutritionnc.com/wic/crossroads.htm
- Frequently Asked Questions, and
- Known Issues

Known Issues include the following information:

- Title/summary
- Details
- Workaround for local users to take
- Expected resolution

When the workaround for the issue states “Issue Manual Food Instruments (MFIs) if possible,” this means:

- Issue MFIs to participants prescribed the default food package
- For any participants prescribed a modified food package:
  - Determine whether MFIs are appropriate to be issued (is it possible for the participant to receive a default food package instead of a modified food package?).
    - If yes, issue one month of MFIs.
    - If no (such as in the case of a need for lactose-reduced milk) the local agency can give the participant (parent/guardian) the choice of whether to accept one month of MFIs. The participant can use the MFIs and not get the regular milk OR they can return the MFIs once the issue has been fixed and get replacement FIs with lactose-reduced milk.
- For any participant on exempt formula or WIC-eligible medical foods:
  - Issue up to a week’s supply from inventory on hand, AND/OR
  - Order product from NSB, OR
  - Complete required forms for participant to obtain product from Medicaid
- Thoroughly document actions/instructions related to care and/or issuance provided in the Notes section of the Nutrition Assessment and Care Plan
- Create a Family Alert about issuance. This will reduce the risk of overissuance in Crossroads. The alert should include: MFIs were given to [which family members] for [which months] and for what reason.
- Note: in some cases, the local user will not be able to match MFIs given to the participant until after a data fix to resolve the issue has been completed. Data fixes can take 1-3 months to complete.

If you have questions regarding any policy aspect of this document, please contact your Regional Nutrition Consultant. If you have any technical questions or receive any system messages that you do not understand, please contact the Nutrition Services Branch (NSB) Customer Service Desk at 919-707-5795, press 2 for Crossroads.
New Family and Family Search

Clinic staff must make every effort to avoid creating duplicate individuals and families. Whether working with an existing family or a new family, always start by performing a search on the Family Search screen using a Search Location of “State-Wide” and a Search Type of both “Family” and “Participant.” This is especially helpful in locating existing families who are active in another site or new individuals whose application was started over the phone.

In the legacy system, the guidance about duplicate records was to contact the NSB Customer Service Desk and ask for a deletion. In Crossroads, duplicate records will either EXPIRE (in the case of applicants), or local users will be able to LINK duplicate individuals together.

For more information, please refer to the following guidance, available on the NSB website (http://www.nutritionnc.com/wic/crossroads.htm): Duplicate Individuals in Crossroads.

Known Issues:

Family Search results in exception error

| Details:  | Searching by last name or Family ID creates a sorry message and prevents the family record from opening. |
| Workaround: | Report the issue to the NSB Customer Service Desk for a data fix. |
| Expected resolution: | This issue is under investigation. |

Family Demographics

Known Issues:

Incorrect county dropdown on family demographics screen

| Details:  | On the Family Demographics screen, in the physical address container, the county dropdown is incorrect for the city entered. |
| Workaround: | Report the issue to the NSB Customer Service Desk. |
| Expected resolution: | This issue is under investigation. |
**Family Assessment**

Family Assessment is one of the certification screens that will be completed by Support Staff. Some of the questions may need to be re-worded to be more meaningful to the participant.

For more information, please refer to the following guidance, available on the NSB website (http://www.nutritionnc.com/wic/crossroads.htm): **Family Assessment Questions**

---

**Participant Demographics**

The Crossroads WIC System is configured to interface with the North Carolina Common Name Database Services system (CNDS). A link with CNDS is made from the Participant Demographics screen in Crossroads. For more information, please refer to the following guidance available on the NSB website (http://www.nutritionnc.com/wic/crossroads.htm): **CNDS**.

**Please note:**

**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:
  - “Changes not accepted”
  - “CNDS and Crossroads don’t match DOB”
- The **participant** must contact Medicaid to report a name change, inaccurate gender or inaccurate DOB.
**Income**

The Income Information screen is a family screen. There are three ways to document income eligibility in Crossroads: 1) adjunctive eligibility; 2) full income screen; or 3) zero income declaration.

For more information, please refer to the following guidance, available on the NSB website (http://www.nutritionnc.com/wic/crossroads.htm): Documenting Income Eligibility in Crossroads

**Frequently Asked Questions:**

**Question 1:** Local users report that when they are trying to certify one child in a multi-participant family, an “income error” (red X) appears even though there is a green check mark. [Only by including the other child's/family member’s income information who is not being certified will the “error” disappear.]

**Guidance:** This is not an error. The Crossroads system is indicating that the entire family is not eligible (note the red X shows under “Family Eligible”) based on the information entered for the one child being certified. The child is eligible as indicated by the green check mark next to his/her name. A child’s adjunct income eligibility only applies to himself. If there is a green check mark next to the “Income Information” quick link for the child, the child is income eligible and the local user can proceed without entering income information on other family members. Additional information can be found in the WIC Program Manual Chapter 6B, Section 2.

**Question 2:** Local users report that after verifying adjunct program participation a green check mark will not appear on the Income Information screen until income details are changed.

**Guidance:** In order to move forward after verifying adjunct program participation, the local user needs to complete the Self-Declared Income/Range field(s). This is described as Step Four of the Adjunctively Eligibility process on the Documenting Income Eligibility in Crossroads guidance. If the local user does not fill out the Self-Declared Income/Range field(s), the full income screen is required.
**Anthro/Lab**

**Frequently Asked Questions:**

**Question 1:** How do local users plot multifetal gestations in Crossroads?

**Guidance:** Multifetal gestations do not plot appropriately with Crossroads. A paper multifetal gestation chart must be used to assess the participant’s weight gain. Scan the manually-completed paper chart into Crossroads. Assign any resulting risks on the **Assigned Risk Factors** screen and document in the Care Plan.

**Question 2:** How do local users change the “Source of Measures” field under the Anthro/Lab when it was done by another provider?

**Guidance:** Double click in the “Collected by” field and backspace to make that field blank. Then the source of measures dropdown will become available. OR click your mouse in the date/height/weight field and tab over to “Collected by” and then hit backspace. Then tab over to “Source of Measures.”

**Known Issues:**

**Growth grid exception error**

<table>
<thead>
<tr>
<th>Details:</th>
<th>Only 0-36 months and WHO 0-24 growth grids are available. Measures are not plotted on any of the available charts. The system has correctly assigned risk 113 based on calculated BMI. It is suspected that this happens only with children being measured exactly on their two year old birthday.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workaround:</td>
<td>Calculate BMI (using a BMI calculator of your choice). Select the “Growth Grids” and choose “BMI (2-20)” from the <strong>Chart Type</strong> drop down list, select “Printer Friendly” and print. Plot the BMI/age on the print-out and scan back into Crossroads. (If “BMI (2-20)” is not available on the <strong>Chart Type</strong> drop down list, use a paper BMI/age chart to plot, and scan into Crossroads.) Repeat for other growth grids for child’s age. Assign any resulting risks on the <strong>Assigned Risk Factors</strong> screen.</td>
</tr>
<tr>
<td>Expected resolution:</td>
<td>A correction to this issue is expected in a future build (1.7).</td>
</tr>
</tbody>
</table>

**Recumbent vs Standing error**

<table>
<thead>
<tr>
<th>Details:</th>
<th>On the Anthro/Lab screen, child’s height measurement type is defaulting to recumbent and as a result, BMI and %BMI/Age are listed as N/A.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workaround:</td>
<td>Some local staff have reported being able to delete the recumbent measure (before saving) and when they re-entered it defaulted to standing. This doesn't always work, and also the problem isn’t usually discovered until the user goes to the growth chart and can’t find the BMI. In these cases, use the workaround above for <strong>Growth grid exception error</strong>.</td>
</tr>
<tr>
<td>Expected resolution:</td>
<td>A correction to this issue is expected in a future build (1.7).</td>
</tr>
</tbody>
</table>
**Exception errors on Health Info, Assigned Risk Factors and Anthro/Lab screens**

<table>
<thead>
<tr>
<th>Details:</th>
<th>Navigating to Anthro/Lab, Health Information and Assigned Risk Factors screens results in Exception Errors. The Exception Error might state: EXCEPTION LEVEL #1: The 'MeasurementDate' property on 'AnthropometricContact' could not be set to a 'null' value. You must set this property to a non-null value of type 'DateTime'. User cannot navigate to Anthro/Lab screen to change date of measure.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workaround:</td>
<td>Report the Family ID to the NSB Customer Service Desk for a data fix. Issue MFIs if possible.</td>
</tr>
<tr>
<td>Expected resolution:</td>
<td>A correction to this issue is expected in a future build (1.6).</td>
</tr>
</tbody>
</table>

**Pre-pregnancy BMI errors**

<table>
<thead>
<tr>
<th>Details:</th>
<th>The pre-pregnancy BMI for a postpartum woman appears to be calculated by using the postpartum/current height of the woman as opposed to the pre-pregnancy height of the woman (if the woman was WIC certified during her pregnancy).</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workaround:</td>
<td>Calculate the postpartum woman’s pre-pregnancy BMI using her pre-pregnancy height (using a BMI calculator of your choice). Assign any resulting risks on the <strong>Assigned Risk Factors</strong> screen and document in the Care Plan.</td>
</tr>
<tr>
<td>Expected resolution:</td>
<td>This issue is under investigation.</td>
</tr>
</tbody>
</table>

**Risk code 201 (low hgb/hct) Assigned Inappropriately**

<table>
<thead>
<tr>
<th>Details:</th>
<th>Non-breastfeeding postpartum woman with Hct of 36.0 is assigned risk code 201 (low hgb/hct) when criteria is &lt; 36.0.</th>
</tr>
</thead>
<tbody>
<tr>
<td>Workaround:</td>
<td>Document inappropriate risk code assignment in the Care Plan. If 201 is the only risk code currently assigned, document that participant is eligible for certification using risk code 401 (failure to meet Dietary Guidelines).</td>
</tr>
<tr>
<td>Expected resolution:</td>
<td>This issue is under investigation.</td>
</tr>
</tbody>
</table>
Health Information

Known Issues:

Duplicate Pregnancy History

**Details:** On the Health Information screen under Woman’s Health Information it says "Infant 1" instead of "[Infant's Name]." Under Breastfeeding Information there is an extra tab named "Infant." Local user cannot issue benefits to the mother. Sometimes the local user is able to issue to other participants in family, other times cannot issue to the entire family.

**Workaround:** Issue MFIs if possible. Report the Family ID to the NSB Customer Service Desk for a data fix.

**Expected resolution:** After all agencies have cycled through conversion.

Incomplete star on health information screen

**Details:** During initial certification or subsequent certification, Health Information screen remains starred. Local user cannot identify which required element is necessary for green check mark to appear. Local user has re-entered every starred element twice. Certification cannot be completed.

**Workaround:** Complete all other screens in Crossroads. Document the Health Information screen data on a paper Care Plan and scan into Crossroads. Issue MFIs if possible. Document in the woman’s care plan and create a Family Alert about issuance. Report the Family ID to the NSB Customer Service Desk for a data fix. With this issue, if the data fix takes a long time, it is possible for the woman’s application to expire. This can take place 10 days after applying for a pregnant woman and 20 days after applying for postpartum/BF women. If the application expires while the local agency is waiting for a data fix, the local user can take the following steps:

1. Do a Family Search and find the participant.
2. Navigate to Care Plan Detail, open the woman’s Care Plan, scroll to the end and select PRINT.
3. Start a new application by navigating to the Subsequent Certification screen, selecting the Apply button next to the woman and selecting the correct category.
4. Complete the certification process, using the information available on the printed Care Plan and the scanned paper Care Plan if needed.
5. Match/document the MFIs previously issued to the participant.

**Expected resolution:** After all agencies have cycled through conversion.

Exception errors on Health Info, Assigned Risk Factors and Anthro/Lab screens

**Details:** Navigating to Anthro/Lab, Health Information and Assigned Risk Factors screens results in Exception Errors. The Exception Error might state: EXCEPTION LEVEL #1:The 'MeasurementDate' property on 'AnthropometricContact' could not be set to a 'null' value. You must set this property to a non-null value of type 'DateTime'.
User cannot navigate to Anthro/Lab screen to change date. Certification cannot be completed.

**Workaround:** Report the Family ID to the NSB Customer Service Desk for a data fix. Issue MFIs if possible.

**Expected resolution:** A correction to this issue is expected in a future build (1.6).
### Migrating/Duplicate Sticky Notes

**Details:** Sticky notes for Health Conditions on the Health Information screen incorrectly carry from one participant to another (in unrelated records/for separate families) on the same user's computer.

**Workaround:** Do not use sticky notes for Health Conditions on the Health Information screen. Document information in the participant’s Care Plan instead. Report the Family ID to the NSB Customer Service Desk.

Sticky notes on other screens appear to be OK to use.

**Expected resolution:** A correction to this issue is expected in a future build (1.7).

### Duplicate Certification

**Details:** An exception error occurs when navigating to Health Information Screen and Prescribe Foods Screen for women. Certification, prescribing food and issuing benefits is prevented.

**Workaround:** Complete all other screens in Crossroads. Document the Health Information screen data on a paper Care Plan and scan into Crossroads. Issue MFIs if possible. Document in the woman’s care plan and create a Family Alert about issuance.

Report the Family ID to the NSB Customer Service Desk for a data fix.

**Expected resolution:** After all agencies have cycled through conversion

### Can’t issue to postpartum woman after miscarriage/fetal death if mom is linked to infant 6-12 months old

**Details:** A postpartum woman with a pregnancy outcome of miscarriage or fetal death has a valid certification period. There is also an infant participant in the family that is between 6-12 months old. There is no option to unlink the infant.

The system is not allowing issuance to participant - mom’s name is greyed out and is marked "Fully Formula Fed".

**Workaround:** Issue MFIs. Document in the Care Plan and create a Family Alert about issuance.

Report the Family ID to the NSB Customer Service Desk for a data fix.

**Expected resolution:** After all agencies have cycled through conversion
**Assigned Risk**

When Crossroads assigns risk codes, it uses the Federal WIC Nutrition Risk Codes. The resource *Current North Carolina WIC Nutrition Risk Criteria and Correlating Federal WIC Nutrition Risk Criteria* correlates the federal codes with the pre-rollout North Carolina WIC Nutrition Risk Codes. This resource is available on the NSB website (http://www.nutritionnc.com/wic/crossroads.htm).

Please note: if the CPA determines that a risk code is missing from the Assigned Risk Code screen and it can’t be manually assigned, document the additional risk code in the participant’s care plan. If the CPA determines that a risk code was system-assigned inappropriately and it can’t be removed, document the inappropriate risk code in the participant’s care plan. If the inappropriate code is the only risk code assigned, state in the care plan that the participant is certified using Risk Code 401 (failure to meet Dietary Guidelines).

**Known Issues:**

**Risk code 114 (At Risk of Overweight) assigning incorrectly**

<table>
<thead>
<tr>
<th>Details:</th>
<th>Parental BMI of 42.4 did not trigger Risk Code 114 (At Risk of Overweight)</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Workaround:</strong></td>
<td>Manually assign the risk code. If it can’t be manually assigned, document the additional risk code in the participant’s care plan.</td>
</tr>
<tr>
<td><strong>Expected resolution:</strong></td>
<td>This issue is under investigation.</td>
</tr>
</tbody>
</table>

**Risk code 121 (Short Stature) assigning incorrectly**

<table>
<thead>
<tr>
<th>Details:</th>
<th>When a baby is premature, Crossroads applies the short stature code. Crossroads does not adjust for prematurity or allow staff to delete the code.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Workaround:</strong></td>
<td>Document inappropriate risk code assignment in the Care Plan.</td>
</tr>
<tr>
<td><strong>Expected resolution:</strong></td>
<td>This issue is under investigation.</td>
</tr>
</tbody>
</table>

**131 (Low Maternal Weight Gain), 132 (Maternal Weight Loss During Pregnancy), 151 (Small for Gestational Age) not assigning correctly**

<table>
<thead>
<tr>
<th>Details:</th>
<th>These risk codes are not System Assigned at this time. In other words, the system does not automatically calculate the gain or loss and trigger a risk code assignment.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Workaround:</strong></td>
<td>The CPA must assign these risks on the Assigned Risk Factors screen.</td>
</tr>
<tr>
<td><strong>Expected resolution:</strong></td>
<td>This issue is under investigation.</td>
</tr>
</tbody>
</table>

**135 (Inadequate Growth) not assigning as expected**

<table>
<thead>
<tr>
<th>Details:</th>
<th>While the user generally chooses to display participant measures in pounds and ounces, Crossroads converts weight gain/loss to grams and compares in grams. This translation from grams to pounds/ounces for display can result in the same number of ounces. Example: In pounds/ounces: Expected weight gain is 3lb 14 oz and actual weight change displayed is 3lb 14oz.</th>
</tr>
</thead>
</table>

Crossroads Guidance ...March 18, 2015...Page 10 of 26
In grams: Expected weight gain is 1,766.5 grams and actual weight change is 1,757.67 total grams. Risk Factor 135 is assigned because actual is less than expected.

**Workaround:** The user can select Metric Measurement Units on the Anthro/Lab screen to view the measures in grams.

**Expected resolution:** None; the system is working as designed.

Risk code 201 (Low hgb/hct) assigned inappropriately

**Details:** Non-breastfeeding postpartum woman with Hct of 36.0 is assigned risk code 201 (low hgb/hct) when criterion is < 36.0.

**Workaround:** Document inappropriate risk code assignment in the Care Plan. If 201 is the only risk code currently assigned, document that participant is eligible for certification using risk code 401 (failure to meet Dietary Guidelines).

**Expected resolution:** This issue is under investigation.

Risk code 332 (Closely Spaced Pregnancies) assigning incorrectly

**Details:** Miscarriages at 4-8 weeks are triggering risk code 332 (closely spaced pregnancies). The definition of the risk is miscarriage >/= 20 weeks.

**Workaround:** Document inappropriate risk code assignment in the Care Plan. If 332 is the only risk code currently assigned, document that participant is eligible for certification using risk code 401 (failure to meet Dietary Guidelines).

**Expected resolution:** An update to the WIC Program Manual will update this risk code to match current Crossroads functionality.

Risk code 334 (Inadequate Prenatal Care) assigning incorrectly

**Details:** Pregnant women < 13 weeks gestation are incorrectly assigned risk code 334. OR Pregnant women with an adequate number of prenatal visits are incorrectly assigned risk code 334.

**Workaround:** Document inappropriate risk code assignment in the Care Plan. If 334 is the only risk code currently assigned, document that participant is eligible for certification using risk code 401 (failure to meet Dietary Guidelines).

**Expected resolution:** A correction to this issue is expected in a future build (1.6).

Risk code 371 (Maternal Smoking) not assigning correctly

**Details:** The options to capture smoking information in Crossroads include “today” (date of certification) and smoking 3 months prior to pregnancy. There is no option if the woman had smoked at any point earlier in the current pregnancy and so there is no trigger to identify Maternal Smoking under those circumstances.

**Workaround:** Document the additional risk code assignment in the Care Plan.

**Expected resolution:** this issue is under investigation.

Risk code 425 (Inappropriate Nutrition Practices for Children) not converting correctly

**Details:** All instances of C78 defaulted to 425.1 during conversion instead of converting to 425.1 - 425.9.
**Workaround:** Document any additional risk code assignments in the Care Plan.

**Expected resolution:** After all agencies have cycled through conversion.

**Exception errors on Health Info, Assigned Risk Factors and Anthro/Lab screens**

<table>
<thead>
<tr>
<th>Details: Navigating to Anthro/Lab, Health Information and Assigned Risk Factors screens results in Exception Errors. The Exception Error might state: EXCEPTION LEVEL #1: The 'MeasurementDate' property on 'AnthropometricContact' could not be set to a 'null' value. You must set this property to a non-null value of type 'DateTime'. User cannot navigate to Anthro/Lab screen to change date. Certification is prevented.</th>
</tr>
</thead>
</table>

**Workaround:** Report the Family ID to the NSB Customer Service Desk for a data fix. Issue MFIs if possible.

**Expected resolution:** A correction to this issue is expected in a future build (1.6).
Certification Summary

Certifications require that a number of system screens be completed by different WIC staff including Support Staff, MOAs, BFPCs and CPAs. The resource Road Map for a Complete Certification goes screen by screen to indicate the fields that need to be completed and the staff role most likely to complete each screen. This resource is available on the NSB website (http://www.nutritionnc.com/wic/crossroads.htm).

Scanning

There are a number of places in Crossroads where the user can scan a document. The resource Scanning Documents guides the user through the scanning process. This resource is available on the NSB website (http://www.nutritionnc.com/wic/crossroads.htm).

Please note: Do not forget to save. There is no prompt to save if you do not save. Check that the scanned document has saved to the application.

Care Plan

There are two resources available to help the local user document care provided to participants in Crossroads. These resources are available on the NSB website:

- Road Map for a Complete Certification
- Mid-year/Mid-certification Assessment Guidance

Frequently Asked Questions:

Question 1: Information for Dietary, Goals and Nutrition Education are not populating in the Care Plan Summary screen even though they populate in Care Plan Detail and were saved properly. What can the local user do?

Guidance: Only Family Goals and Family Nutrition Education will populate in the Care Plan Summary. Individual Goals and Individual Nutrition Education are saved in the Care Plan Detail.
Referrals

Frequently Asked Questions:

**Question 1:** How can I find the SNAP referral for my county?

**Guidance:** SNAP is a pre-populated dropdown in the referrals list, but NC has grouped all social services referrals (Medicaid, SNAP, TANF) together under **Medicaid.** When your agency wants to refer to SNAP the local user should choose the dropdown for Medicaid and that should return results.

**Question 2:** How does the local user search for referrals?

**Guidance:** Ask your WIC Director for the list of agency referrals submitted to NSB. Follow the steps listed below:

1. There is a container at the very top of the screen called “Referral Search.” Click the arrow on this container to open it completely if it is not already open.
2. If the local user looks at the list of agency referrals submitted to NSB, the user will see a field called “Type of Referral.” This field will match the **Program Name** field in Crossroads. For example, if the “Type of Referral” is **CC4C**, look for this referral type in the **Program Name** drop down list.
3. Under **Search Type** select **County**.
4. UNCHECK the **View only System suggested** checkbox.
5. Hit the **Search** button. Results will be limited to the submissions you provided. You are welcome to submit other referrals to NSB and they will be updated periodically.
6. If you wish to refer the individual to a result, select the green plus sign.

![Referral Search](image)

**Nutrition Education**

Support staff may provide the nutrition education such as a mini-lesson or document completion of a wichealth.org lesson. The resource **Documenting Low-risk Nutrition Education** outlines how to complete the required documentation. This resource is available on the NSB website (http://www.nutritionnc.com/wic/crossroads.htm).
Prescribe Food

There are a number of resources available to help the local user prescribe food in Crossroads. These resources are all available on the NSB website and include:

- Formula (or WIC-Eligible Medical Foods) Change After Issuance Quick Reference Guide
- Issuing $8 CVVs to Children in Crossroads
- Prescribing Food Packages to the BF Dyad
- Ordering Formula from NSB Due to Crossroads Transition
- Change in Standard Milk issuance
- Returning Formula
- Issuing to Partially Breastfeeding Moms of Infants Older than Six Months with a >MMA or Fully Formula Fed Package
- Food Package Resource Guide
- Infant Formulas, Exempt Infant Formulas and Medical Foods: Reconstituted Fluid Ounces
- Issuance of Exempt Formula to infants Six to Eleven Months of Age

Frequently Asked Questions:

Question 1: Why isn’t there a table for amounts of formula considered <MMA and >MMA?

Guidance: Because NC uses the rounding method for determining MMA, there is no one answer for all products. It depends on the reconstituted ounces of formula, which is listed in Chapter 7, Attachment 1 of the NC WIC Program Manual. For example, in some cases prescribing 348 oz would be <MMA and prescribing 350 oz would be >MMA, but both prescriptions would result in the participant receiving 4 cans of powdered formula. NSB recommends that the CPA have a conversation with the mom, enter the amount of formula decided upon, and if that amount adversely affects the mom’s food package, adjust the ounces downwards (by 2 – 5 ounces a time) until the desired food package for the mom appears.

Question 2: Food packages with lactose free/reduced milk with cheese added print with an additional food instrument each month that has no food listed on it, but the rest of the FI prints out with a FI number, the Family ID, Name etc. When you look up the blank food instrument on the Food Instrument List, it has 0 gallons of lactose free/reduced milk on it. Why does this happen and how can local users prevent it?

Guidance: To avoid printing this extra FI, prescribe only 3.00 gallons (instead of 3.25) of lactose free/reduced milk when including cheese in the food package. In other words, don’t include the dangling quart in a food package with lactose free/reduced milk which includes cheese. If the FI has been printed, void the blank food instrument.
Question 3: An infant is transferring into the state, requesting an exempt formula product. They don’t have an Rx for the product. The policy is to issue 1 month without the Rx (only for transfers). How should local users complete the Crossroads medical documentation?

Guidance: Local users should check “verbal order,” set the expiration date to 1 month, and explain the situation in their assessment note. Please see the NC WIC Program Manual, Chapter 7, Section 5.

Question 4: Local agencies report not being able to view the Medical Documentation for participants who are expired or in applicant status. In addition, support staff report not being able to view any Medical Documentation. Is there a workaround for this?

Guidance: Local users can scan Medical Documentation to Scanned Documents from another screen instead of OR in addition to scanning on the Medical Documentation screen.

Known Issues:

Prescribe/Issuance screen exception errors
Details: Local user is trying to print benefits, gets unhandled exception error when clicking on Prescribe Food and Issue Food Instruments screens.

Workaround: Issue MFIs if possible. Report the issue to the NSB Customer Service Desk for a data fix.

Expected resolution: After all agencies have cycled through conversion.

Duplicate Foods on Food Prescription
Details: Food packages on the Prescribe Food Screen are repeated multiple times. Occasionally the local user can zero out the duplicates but most of the time there are too many to delete.

Workaround: The user should try to zero out all the duplicated foods. If there are too many duplicates to zero out, or the prescription will not save after zeroing out duplicates, report the Family ID/issue to the NSB Customer Service Desk for a data fix. Issue MFIs.

Expected resolution: After all agencies have cycled through conversion.

Issuing to Partially Breastfeeding Moms of Infants Older than Six Months with a >MMA or Fully Formula Fed Package
Details: Crossroads may allow issuance to a partially breastfeeding participant with an infant older than 6 months who is on a > MMA or Fully Formula Fed food package.

Workaround: DO NOT issue to the mom. Use the guidance Issuing to Partially Breastfeeding Moms of Infants Older than Six Months with a >MMA or Fully Formula Fed Package to issue only to the infant.

Expected resolution: A correction to this issue is expected in a future build (1.6).

Duplicate Certification
Details: An exception error occurs when navigating to Health Information Screen and Prescribe Foods Screen.
<table>
<thead>
<tr>
<th>Workaround: Complete all other screens in Crossroads. Document the Health Information screen data on a paper Care Plan and scan into Crossroads. Issue MFIs if possible. Document in the woman’s care plan and create a Family Alert about issuance. Report the Family ID to the NSB Customer Service Desk for a data fix.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Expected resolution:</strong> After all agencies have cycled through conversion</td>
</tr>
</tbody>
</table>
Issue Food Instruments (FIs) and Manual Food Instruments (MFIs)

There are a number of resources available to help the local user to issue FIs and MFIs in Crossroads. These resources are all available on the NSB website and include:

- **Replacing FIs after Issuance Quick Reference Guide**
- **Returning Formula**
- **Voiding HSIS FIs for Pts During Crossroads Transition**
- **Issuing to Partially Breastfeeding Moms of Infants Older than Six Months with a >MMA or Fully Formula Fed Package**
- **Formula Wizard**
- **Food Package Resource Guide**
- **Instructions for Manual Food Instruments and Register**
- **Match Pending MFI Instructions**
- **Voiding Pending MFI Instructions**

**Three months issuance**

**Details:** The Issue Food Instruments Screen is only showing three months of benefits available, when the system should display four months. The system issued a third month of benefits for one family member, but not the other.

**Workaround:** Issue MFIs if possible.

**Expected resolution:** A correction to this issue is expected in a future build (1.6).

**Formula Issuance Amount Incorrect**

**Details:** Only one can of formula is displayed on the Issue Food Instruments screen even though the infant is receiving a full formula fed package.

**Workaround:** Issue MFIs if possible.

**Expected resolution:** A correction to this issue is expected in a future build (1.6).

**Can’t issue to postpartum woman after miscarriage/fetal death if mom is linked to infant 6-12 months old**

**Details:** A postpartum woman with a pregnancy outcome of miscarriage or fetal death has a valid certification period. There is also an infant participant in the family that is between 6-12 months old. There is no option to unlink the infant. The system is not allowing issuance to participant. - mom’s name is greyed out and is marked "Fully Formula Fed".

**Workaround:** Issue MFIs. Document in the Care Plan and create a Family Alert about issuance. Report the Family ID to the NSB Customer Service Desk for a data fix.

**Expected resolution:** After all agencies have cycled through conversion.

**Issuing to Two Family Members Receiving the Same Formula**

**Details:** Users are advised to double check Crossroads issuance to twins (or to an infant and child in the same family) who are receiving the same formula.

**Workaround:** Carefully review the Food Instruments (FIs) generated. Compare the number of
cans issued to the number of cans prescribed to each participant (found on the bottom of the Prescribe Food Quick Link). Void any FIs that exceed expected issuance.

**Expected resolution:** A correction to this issue is expected in a future build.

### Issuing to Partially Breastfeeding Moms of Infants Older than Six Months with a >MMA or Fully Formula Fed Package

**Details:** Crossroads may allow issuance to a partially breastfeeding participant with an infant older than 6 months who is on a > MMA or Fully Formula Fed food package.

**Workaround:** DO NOT issue to the mom. Use the guidance Issuing to Partially Breastfeeding Moms of Infants Older than Six Months with a >MMA or Fully Formula Fed Package to issue only to the infant.

**Expected resolution:** A correction to this issue is expected in a future build (1.6).

### Prescribe/Issuance screen exception errors

**Details:** Local user is trying to print benefits, gets unhandled exception error when clicking on Prescribe Food and Issue Food Instruments screens.

**Workaround:** Issue MFIs if possible. Report the issue to the NSB Customer Service Desk for a data fix.

**Expected resolution:** After all agencies have cycled through conversion.

### Signature Pending

**Details:** FIs voided but availability dots indicate "signature pending."
- Local user voided FIs and attempted to reissue.
- Received message "FI already printed by another user."
- Availability dots indicate "signature pending" and reissuance is not possible.

**Workaround:** Issue MFIs if possible. Report the issue to the NSB Customer Service Desk for a data fix.

**Expected resolution:** Will continue to occur periodically.

### Matching MFIs exception error

**Details:** Local agency has attempted several times to match the MFI issuance to participant, each time resulting in an exception error. This issue is the result when MFIs cannot be matched if the participant needs a data fix for another reason; such as required with Duplicate Certification.

**Workaround:** Document issuance in care plan and using a Family Alert.

**Expected resolution:** A correction to this issue is expected in a future build (1.6.4.0).
**Return Formula**

There are two resources available to help the local user return formula in Crossroads. These resources are available on the NSB website:

- Returning Formula
- Formula Change after Issuance Quick Reference Guide

**Frequently Asked Questions:**

**Question 1:** If the participant returned 7 cans of one formula, why did they get a food instrument for 8 cans of the replacement formula?

**Guidance:** Users are expecting the system to issue can for can. However, the return formula screen replaces on an **ounce for ounce** basis, not can for can. Additionally, infant formula is provided using a rounding methodology. Please note the size of the can does not matter, it is the reconstituted fluid ounces (RFO) that is key. Each product’s RFO is listed in the WIC Program Manual, Chapter 7, Attachment 1.

Example: Gerber Good Start Soothe reconstitutes to 90 ounces. 7 cans x 90 = 630 ounces

Nutramigen Enflora LGG reconstitutes to 87 ounces. 630 ÷ 87 = 7.24 cans which rounds to 8 cans.

**Known Issues:**

**Return formula exception error**

**Details:** Local user returning formula entered a new RX, navigated to Return Formula, entered cans to be returned. After selecting save, user received an exception error.

**Workaround:** Issue formula from local inventory or order formula from NSB.

**Expected resolution:** A correction to this issue is expected in a future build (1.6).

**Return Formula Failed**

**Details:** Local user was attempting to replace Gerber Good Start Gentle powder, replacing only cans, no Food Instruments.

Food Prescriptions were updated correctly.

Total cans were not more than the amount originally issued.

The newly prescribed replacement formula was available in the drop down list.

When the local user selected save the status message "formula return failed" was received.

The issue occurs when attempting to only return cans of formula in hand (no food instruments) and the status message Formula Return Failed is displayed.

**Workaround:** Issue formula from local inventory or order formula from NSB.

**Expected resolution:** A correction to this issue is expected in a future build (1.6).
**Subsequent Certification**

**Known Issues:**

**Unable to certify/issue to child 4y 11m ~25d**

<table>
<thead>
<tr>
<th>Details:</th>
<th>Local user started a Subsequent Certification on a child who was a few days shy of his fifth birthday. When they navigated to the CERTIFY button they found it grayed out. Child could not be issued to.</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Workaround:</strong></td>
<td>Issue MFIs for last month of issuance. <strong>Best practice:</strong> Navigate to Prescribe foods/Issue Food Instruments screen before applying for subsequent certification for children of this age. If the issuance date is before the certification ends, it is possible to issue to the child without first completing the subsequent certification.</td>
</tr>
<tr>
<td><strong>Expected resolution:</strong></td>
<td>This issue is being investigated; a system alert is being recommended.</td>
</tr>
</tbody>
</table>
Scheduling

There are three resources available to help the local user with scheduling in Crossroads. These resources are available on the NSB website:

- Scheduling
- Blocking Appointment Slots on the Crossroads Master Calendar
- Creating Time Slots for Appointments on the Crossroads Master Calendar

Frequently Asked Questions:

**Question 1:** Why doesn’t Quick Appointments show Mid-Certification Assessment appointments?

**Guidance:** There are two appointment types in the Crossroads system: system-generated (programmed into Crossroads) and state-generated (added into Crossroads by NC). There are four system-generated types: Initial Certification, Subsequent Certification, Nutrition Education – Individual, and Food Benefit Issuance. All others are state generated.

Because Mid-Certification Assessments are a state generated appointment type, they won’t show up by default in suggested appointments. Local users have to ADD this appointment type when searching for appointments.

**Question 2:** Will Quick Appointments only suggest Nutrition Education – Individual when it is required, and not show it if the participant has received it?

**Guidance:** No, local users have to intentionally check whether participants have received the required appointments. Crossroads does not track whether required nutrition education has been completed.

**Question 3:** How do local users mark attendance and do other work with class participants?

**Guidance:** Take the following steps:

- Go to the Master Calendar.
- In the View Filters container, under Show Data, check the box for Nutrition Education classes.
- Make sure you are in Day view.
- Double click on the class.
- A class container will pop up and allow the user to view attendance and work with participants.
Breastfeeding Care Plan and Supplies

There are three resources available to help the local user provide care to breastfeeding women in Crossroads. These resources are available on the NSB website:

- Breastfeeding Complications Crosswalk
- Breast Pump Issuance
- Breastfeeding Supplies

Known Issues:

**Breastfeeding Peer Counseling Care Plan not available after category change**

**Details:** After a woman’s category changes from Breastfeeding to Postpartum, the Breastfeeding Peer Counseling Care Plan cannot be viewed or updated. Local user receives an exception error when navigating to Breastfeeding Peer Counseling Care Plan.

**Workaround:** Complete the paper version of the BFPC Care Plan and scan into the participant’s record.

**Expected resolution:** A correction to this issue is expected in a future build.

**Breast Pump cannot be returned**

**Details:** Local user reports that a family had returned a pump and under the family it states the pump was returned but under the inventory it states the pump is still issued.

**Workaround:** Maintain a paper inventory for any product that is not responding as expected.

**Expected resolution:** This issue is under investigation.

**Breast Pump cannot be issued**

**Details:** Local user reports answering all questions related to issuing a breast pump. When the local user attempts to capture the participant’s signature, the Capture Signature button is grayed out and the pump cannot be issued. OR the breastpump issuance screen freezes and the pump cannot be issued. OR issuing a breastpump takes an exceptionally long time.

**Workaround:** Maintain a paper inventory for any product that is not responding as expected.

**Expected resolution:** This issue is under investigation.
Inventory


Known Issues:

Details: Inventory Search Results (Products) container loads, but when user selects a row within that container:
1. The Inventory Search Results (Items) container does not populate
2. The Issue/reserve/dispose/return buttons are disabled
OR Inventory Search Results (Products) takes an exceptionally long time to load.

Workaround: Maintain a paper inventory for any product that is not responding as expected. Report the issue/product to the NSB Customer Service Desk.

Expected resolution: This issue is under investigation.

Reports

There are a limited number of reports available in Crossroads at this time. Validation of other reports is ongoing. Instructions and training on using/interpreting the reports will be provided in the future.

Known Issues:


Details: Local user occasionally cannot print the Detail Daily Clinic Appointment Report.

Workaround: Call NSB Customer Service Desk and request that they print and fax the report.

Expected resolution: A correction to this issue is expected in a future build.

Report Printing Errors – Missed Appointment Letters

Details: Local user cannot print all of the expected Missed Appointment Letters. Local users report that the system is printing missed appointment notices for Initial and Subsequent Certification but not Mid-Certification or Low-Risk Follow Up. There is no record of notification in the Journal of Transactions.


Expected resolution: This issue is under investigation.
Notifications

The Crossroads resource **Printing Missed Appointment Notifications** (available on the NSB website, [www.nutritionnc.com/wic/crossroads.htm](http://www.nutritionnc.com/wic/crossroads.htm)) outlines the process for generating printed notices.

**Frequently Asked Questions:**

**Question 1:** How do local users print a “No Longer Eligible” notification for a woman who stops breastfeeding after six months?

**Guidance:** If a breastfeeding participant with an infant greater than 6 months of age reports that she is no longer breastfeeding, that participant becomes ineligible within her certification period. Staff should do the following, taking care to follow the steps in the order they are presented:

1. Follow the guidance for providing a required participant notice. Refer to the WIC Program Manual (WPM) “Ineligibility Notification” Chapter 6D, Section 2. **If other steps are taken before the notification is given, the notification may become unavailable in the system.**

2. Follow guidance for issuing food benefits to the participant.
   a. If the participant already has been issued food benefits, further issuance is not permitted. If the participant has been issued more than 15 days’ worth of food benefits, staff should attempt to retrieve those food instruments the participant is not entitled to.
   b. If the participant has not been issued food benefits:
      i. Remove the woman from the family’s aggregation.
      ii. Generate one month of benefits **for the woman only** from the Crossroads system and either:
         1. Manually prorate to approximately ½ the total food package or 15 days’ worth of food benefits for the participant(s) determined to be ineligible OR
         2. Modify the food prescription to reduce the total benefit to approximately ½ the total food package or 15 days’ worth of food benefits prior to issuance.
         3. See proration rules in Chapter 8, Section 5 of the WPM for food items that do not need to be adjusted.
         4. Other participants will be issued to in **Step 4.**

3. Document any changes to the dyad’s Health Information and/or Food Prescription on the appropriate screens in Crossroads. During this step, the system will alert the user that the participant is no longer eligible and will be terminated. Since the participant was given the required participant notice in Step 1, it is safe to terminate. Document any care and nutrition education appropriately.
Please note: If the participant has been receiving services from a Breastfeeding Peer Counselor, alert the Peer Counselor. Once the woman has been terminated, the Breastfeeding Peer Counseling (BFPC) Care Plan is no longer enabled. If the Peer Counselor has other documentation on the participant after the Care Plan is no longer enabled, the documentation may be entered on the family’s Care Plan Summary or scanned in separately. (The BFPC Care Plan will remain enabled in a future build of Crossroads even when the participant is no longer active.)

4. Issue food benefits to the remaining participants in the family.

Please note: If the steps are not followed in order and the notification is unavailable in the system, a paper copy of the required participant notice should be filled out by the local user, scanned into the participant’s Crossroads record, and given to the participant. A template of the NC WIC Program Notice is available on the NSB website at www.http://www.nutritionnc.com/wic/crossroads.htm.

Known Issues:

<table>
<thead>
<tr>
<th>Cannot Print Next Certification Due Notice When There is a Family Member Who is Not Active</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Details:</strong> Local agency Support Staff are not able to print the <em>Next Certification Due Notice</em> for a participant(s) from the Issuance screen if there is a family member who is not active (such as someone with an expired certification or one in applicant status).</td>
</tr>
<tr>
<td><strong>Workaround:</strong> In this circumstance, the notice can only be printed from the <em>Certification Summary</em> screen, which can only be done by a CPA. OR fill out a paper copy and scan into Crossroads. A template of the NC WIC Program Notice is available on the NSB website at <a href="http://www.nutritionnc.com/wic/crossroads.htm">www.http://www.nutritionnc.com/wic/crossroads.htm</a>.</td>
</tr>
<tr>
<td><strong>Expected resolution:</strong> This issue is under investigation.</td>
</tr>
</tbody>
</table>