Road Map for a Complete Certification (including prescribe benefits, issuing benefits and scheduling)

Certifications require that a number of system screens be completed by different WIC staff including support staff, MOAs, BFPCs and CPAs. Some screens need to be completed once for the entire family, while other screens need to be completed individually for each member of the family. This resource goes screen by screen to indicate the fields that need to be completed and the staff role most likely to complete each screen. Required fields in Crossroads are designated by a yellow star (★); additional fields may be required by North Carolina policy.

1. The **New Family** screen will most likely be completed by support staff.
2. In addition to the fields marked with the ★, it is recommended that you include the middle initial for participants.
3. The Family Demographic screen will most likely be completed by support staff.

4. In addition to the fields marked with the ⭐, enter the telephone number(s).

5. The Family Assessment screen will most likely be completed by support staff.

6. All questions are required by NC Policy.

Note: Refer to the Family Assessment Question Resource for clarification on the questions.
7. The Participant Demographics screen will most likely be completed by support staff.

8. In addition to the fields marked with the star, select Declared or Observed under Race/Ethnicity.

9. The Income Information screen will most likely be completed by support staff.

10. Enter the Family Size and No. of Expected Infants if the participant is pregnant.

11. In addition to the fields marked with the star, enter a Self-Declared Income Range if the participant (family) is adjunctively eligible.
12. The Certification Signature screen will most likely be completed by support staff.

13. Click Capture Signature so the participant may sign using the electronic signature pad.

14. The Anthro/Lab screen will most likely be completed by the medical office assistant (MOA).
15. The **Health Information** screen will be completed by the CPA.

16. North Carolina policy requires all data fields be completed. This includes updating **Immunizations Status** for infants and children.

17. The **Dietary & Health** screen will be completed by the CPA.

18. North Carolina policy recommends all questions be addressed.
19. The Care Plan screens will be completed by the CPA.

20. The entire Care Plan is required for Certification. The sections include:
   a. Goals
   b. Nutrition Education
   c. Referrals

21. The Goals screen will be completed by the CPA.
22. The **Nutrition Education** screen will be completed by the CPA.

23. The **Referral** screen will be completed by the CPA.
24. The **Certification Summary** screen will be reviewed by the CPA.

25. The **Certification Summary** provides an overview of the certification process. A green check marks (✓) indicates completion. This is true for all required sections, except the Care Plan. A red (X) indicates incompletion and requires the users to return to the required screen to complete the information.

26. The **Prescribe Food** screen will be completed by the CPA.

**Note:** Please refer to the Modifying Food Package resource for additional information.
27. The **Issue Food Instruments** screen will most likely be completed by support staff.

Note: Please refer to the Scheduling resource for additional information.

28. The **Quick Appointments** screen will most likely be completed by support staff.