

Road Map for a Complete Certification (includes prescribing food, 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.

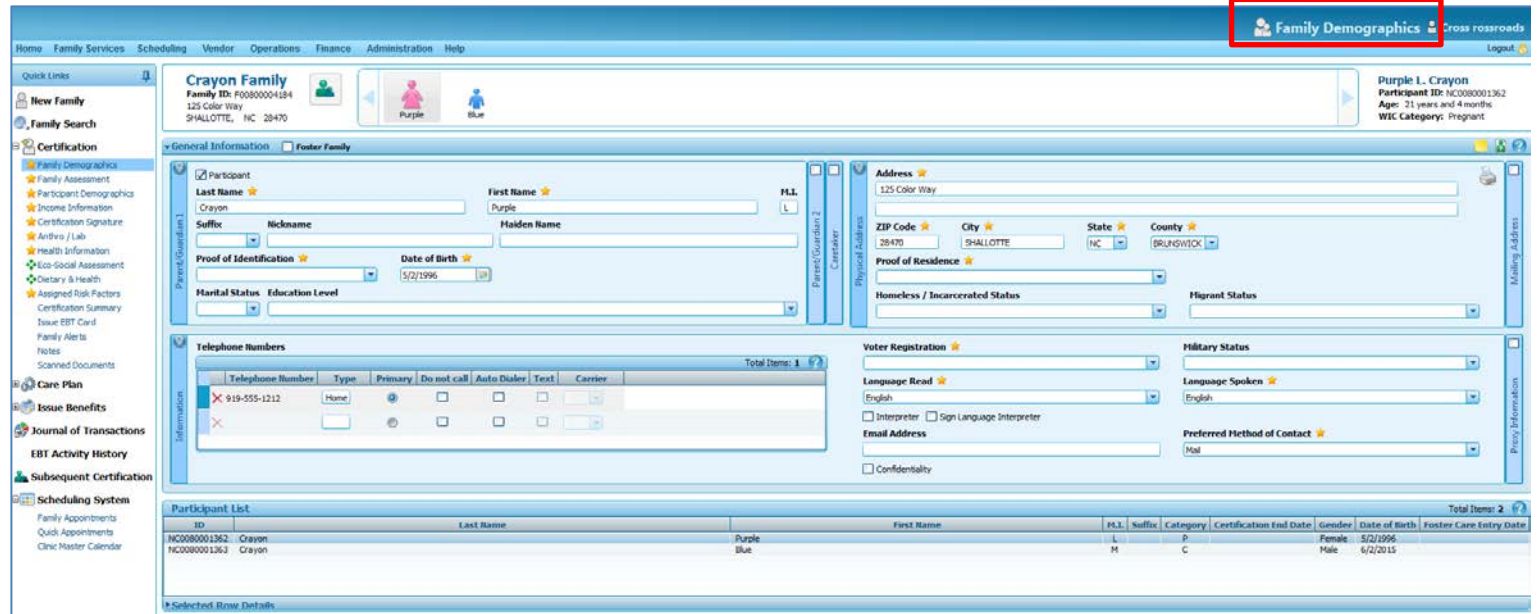
1. The **New Family** screen will most likely be completed by support staff.
2. In addition to the fields marked with the ★, it is recommended that you include the middle initial for participants and the telephone numbers.

The screenshot shows the 'New Family' screen in the Crossroads system. The 'New Family' button is highlighted in red. The 'H.I.' field is highlighted in red. The 'Telephone Numbers' table is highlighted in red. The 'Add Participant' section and 'Participant List' table are also visible.

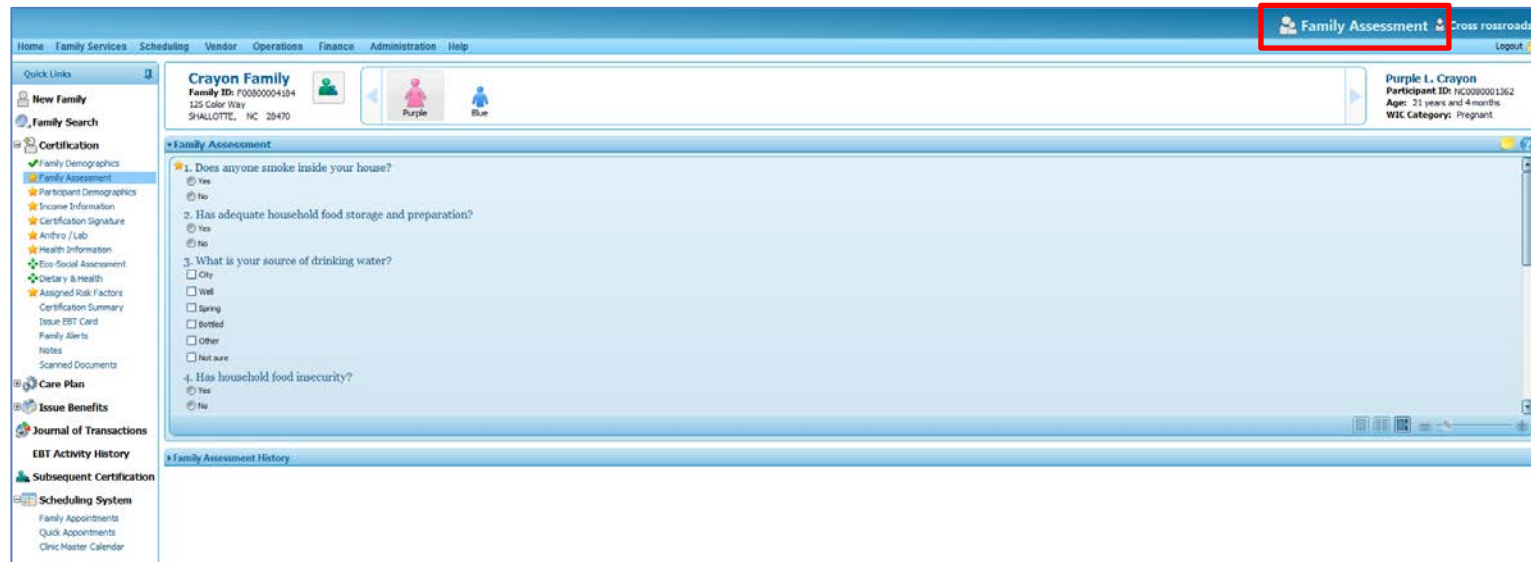
Telephone Number	Type	Primary	Do not call	Auto Dialer	Text	Carrier
919-555-1212	Home	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	

Last Name	First Name	H.I.	Suffix	Date of Birth	Category	Gender	Foster Care Entry Date
Crayon	Purple	L		5/2/1996	P	Female	
Crayon	Blue	M		6/2/2013	C	Male	

3. The **Family Demographics** screen will most likely be completed by support staff.



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



5. All questions are required by NC Policy.

Note: Refer to the **Family Assessment Question Resource** for clarification on the questions.

6. The **Participant Demographics** screen will most likely be completed by support staff.
7. In addition to the fields marked with the ★, select **Declared** or **Observed** under **Race/Ethnicity**.
8. Complete **Link From** **CNDS** for each participant in the family.

The screenshot shows the 'Participant Demographics' screen for the 'Crayon Family'. The interface includes a navigation menu on the left with options like 'New Family', 'Family Search', 'Certification', 'Care Plan', and 'Issue Benefits'. The main content area is titled 'General Information' and contains several sections:

- Identity Information:** Fields for Last Name (Crayon), First Name (Purple), Suffix, and Hidden Name.
- Proof of Identification:** A dropdown menu set to 'Bill or account statement < 60 days'.
- Date of Birth:** 5/2/1996.
- Age:** 21 years and 4 months.
- WIC Category:** Pregnant woman.
- Race/Ethnicity:** A section with a red box around the 'Declared' and 'Observed' radio buttons. Below are checkboxes for various racial and ethnic groups: American Indian or Alaskan Native, Asian, Black or African American, White, and Native Hawaiian or Pacific Islander.
- Physical Presence:** Radio buttons for 'Yes' and 'No'.
- Incarcerated Status:** Radio buttons for 'Yes' and 'No'.
- Education:** A dropdown menu.
- Marital Status:** A dropdown menu.
- Employment Status:** A dropdown menu.

At the bottom right, there is a 'Link From CNDS' button and a 'Cancel' button, both highlighted with red boxes. The top right corner shows the user's name 'Purple L. Crayon' and their ID 'NC0080001362'.

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

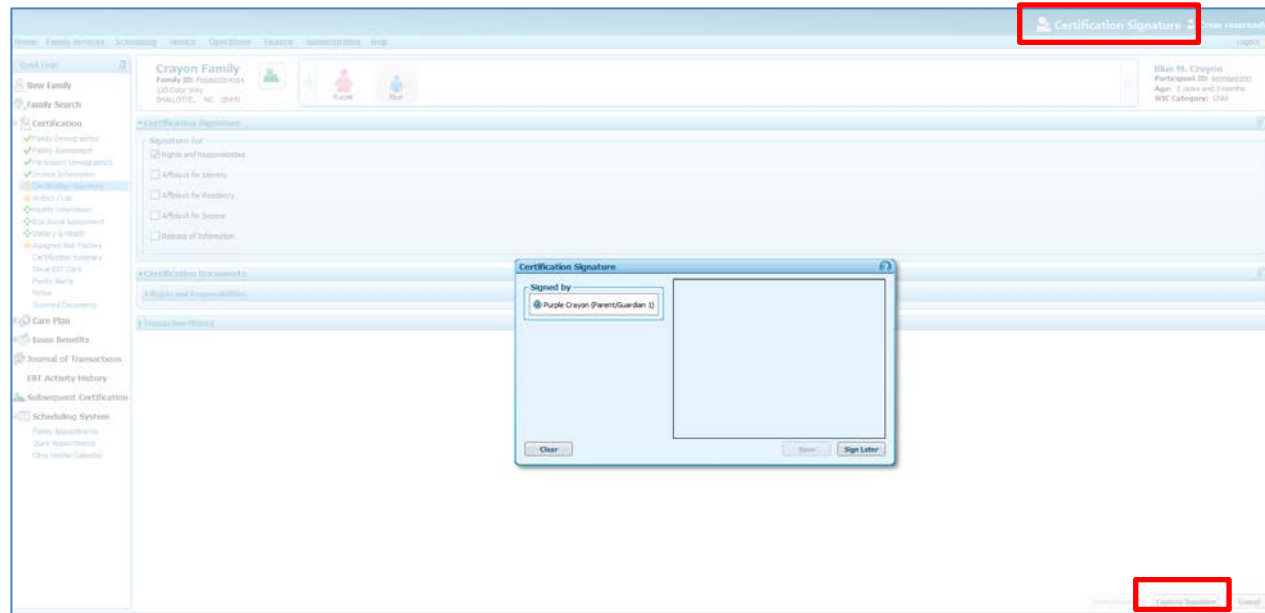
10. Enter the **Family Size** and **No. of Expected Infants** if the participant is pregnant.

11. In addition to the fields marked with the ★, enter a **Self-Declared Income Range** if the participant (family) is adjunctively eligible.

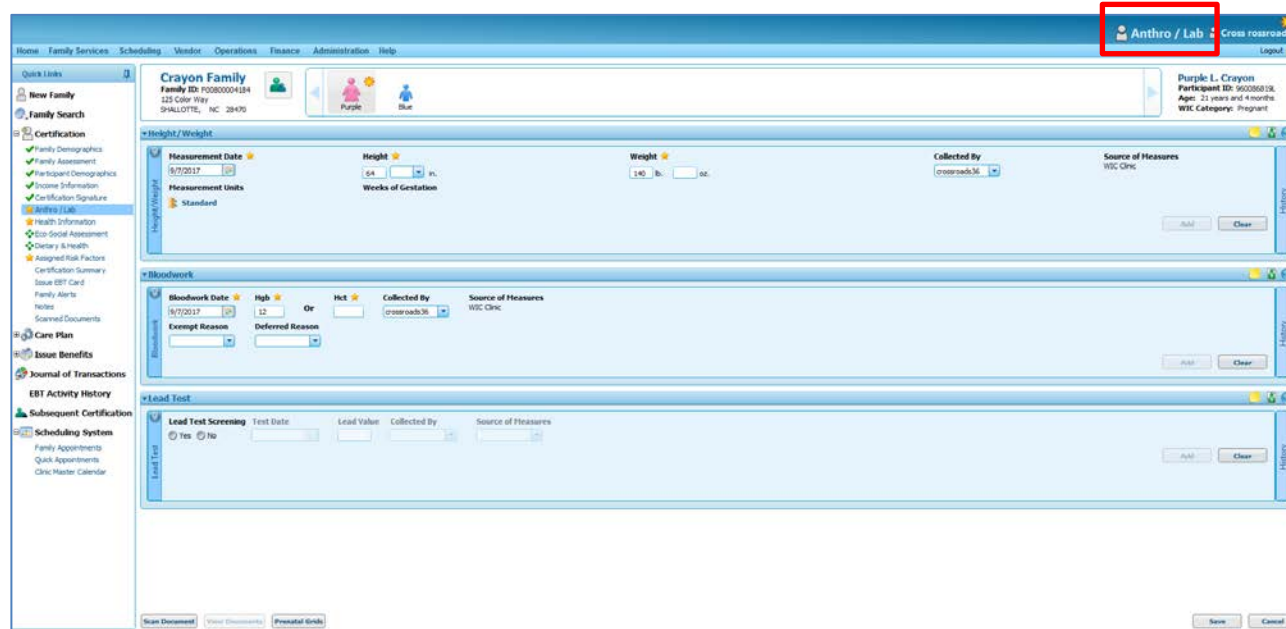
The screenshot displays the 'Income Information' screen for the 'Crayon Family'. The interface includes a navigation menu on the left with options like 'New Family', 'Family Search', 'Certification', 'Income Information', 'Care Plan', 'Issue Benefits', 'Journal of Transactions', 'EBT Activity History', 'Subsequent Certification', and 'Scheduling System'. The main content area shows family details for 'Crayon Family' (Family ID: F00800004184) and a participant 'Blue M. Crayon' (Participant ID: 9600868200). The 'Family Income' section includes fields for 'Family Size' (1), 'No. of Expected Infants' (2), and 'Total Family Size' (3), all marked with a star (★). Below this is a table for 'Family - Adjunct. Participation' with columns for SNAP, Medicaid, TANF, and School Lunch. The 'Self-Declared Income' section offers two options: 'Self-Declared Income' or 'Self-Declared Income Range', with the latter set to '6,000.00 - 7,199.00'. The 'Income Details' section shows a table for income sources and a summary for 'Zero Income Declaration Reason' with a 'Total Income' of \$0.00 and an 'Eligibility Guideline Amount' of \$30,044.00. The 'Income History' section includes a table with columns for 'Documentation Date', 'Total Family Size', 'Total Income', 'Total Income Frequency', 'Eligible', 'Zero Income Reason', 'Self-Declared Income', and 'Self-Declared Income Range'. The bottom of the screen has 'Save' and 'Cancel' buttons.

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).



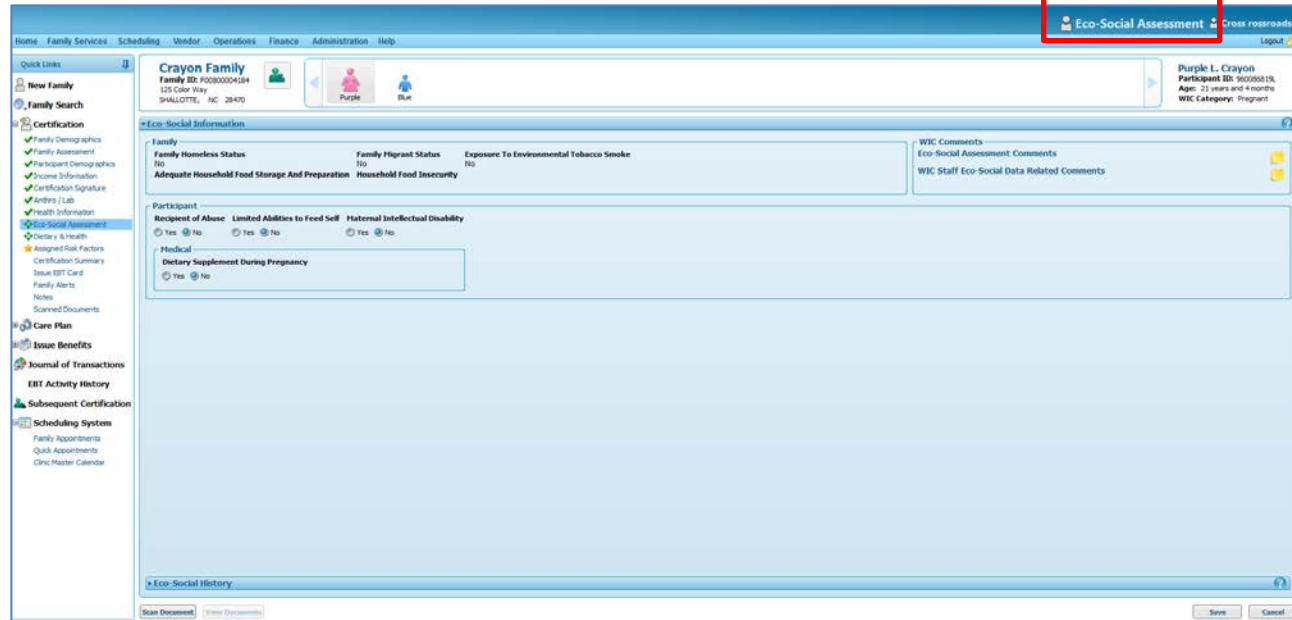
15. The **Health Information** screen will be completed by the CPA.

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

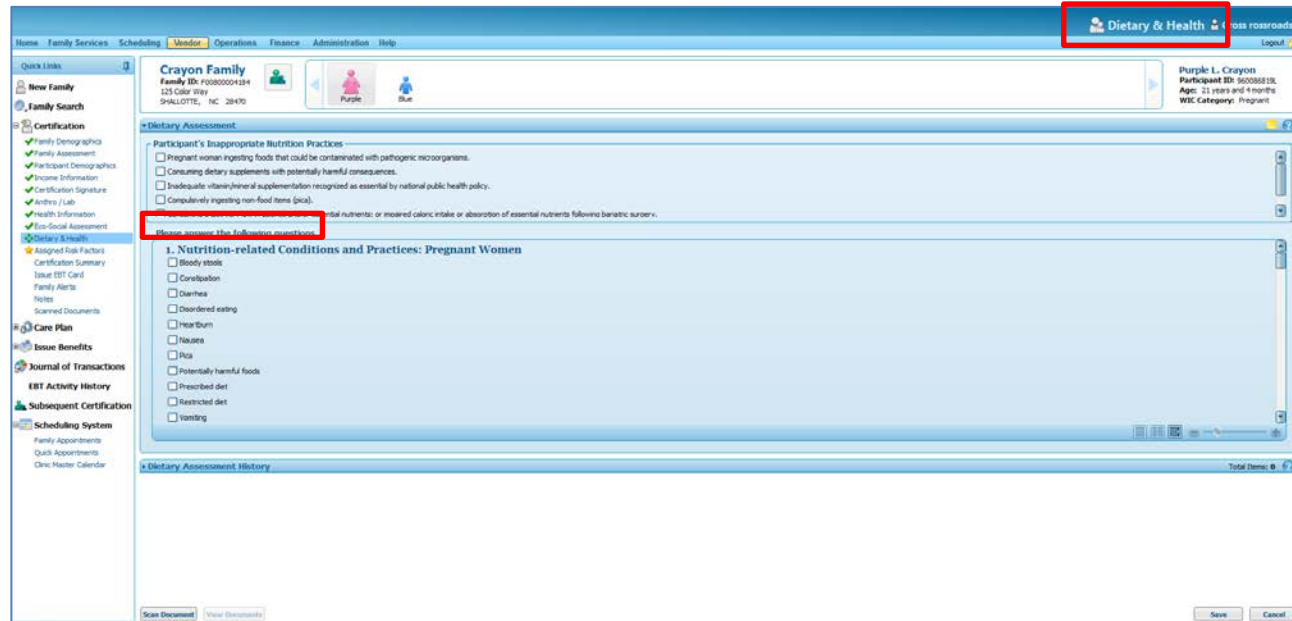
This screenshot shows the 'Health Information' section for a woman's pregnancy record. The 'Health Information' tab is highlighted in the top navigation bar. The form includes fields for 'Pre-Pregnancy Measurement Units', 'Pre-Pregnancy Weight', 'Pre-Pregnancy BMI', 'Cigarettes Per Day', 'Drinks Per Week', 'Last Menstrual Period', 'Expected Delivery Date', 'First Prenatal Healthcare Visit Date', 'Date Last Seen By Physician', 'Number of Prenatal Healthcare Visits', 'Proof of Pregnancy', 'Dietary Supplement Taken Before Pregnancy', 'Number of Fetuses This Pregnancy', 'Gravida', 'Para', 'Medical Home', 'Adequacy of Prenatal Care', 'Age at Conception', 'Inter-Conception Time in Months', and 'Currently Breastfeeding?'. There are also two large empty boxes for 'Pregnancy Induced Health Conditions' and 'Health Conditions'.

This screenshot shows the 'Infant / Child Health Information' section. The 'Health Information' tab is highlighted in the top navigation bar. The form includes fields for 'Measurement Units', 'Birth Length', 'Birth Weight', 'Hospital Discharge Date', 'Hospital Discharge Weight', 'Medical Health Conditions', 'Medical Home', 'Last Seen By Physician', 'Multiple Gestation', and 'Weeks Gestation'. A red box highlights the 'Immunization Status' button at the bottom of the form.

17. The **Eco-Social Assessment** screen will be completed by the CPA.

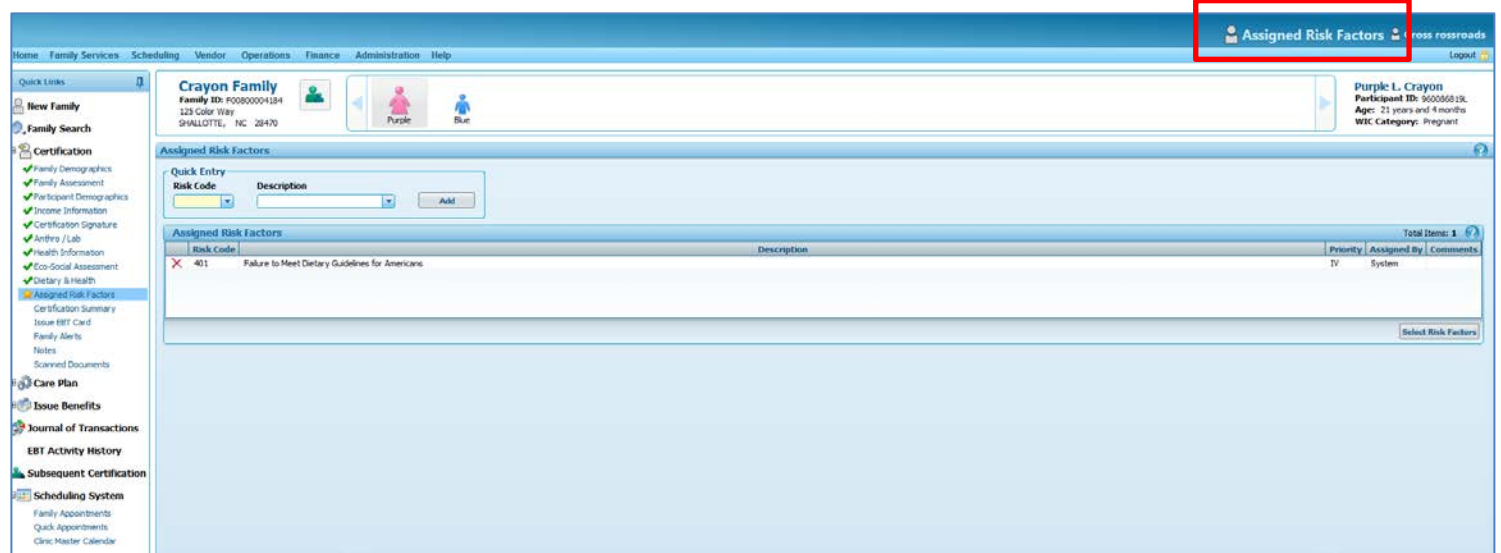


18. The **Dietary & Health** screen will be completed by the CPA.



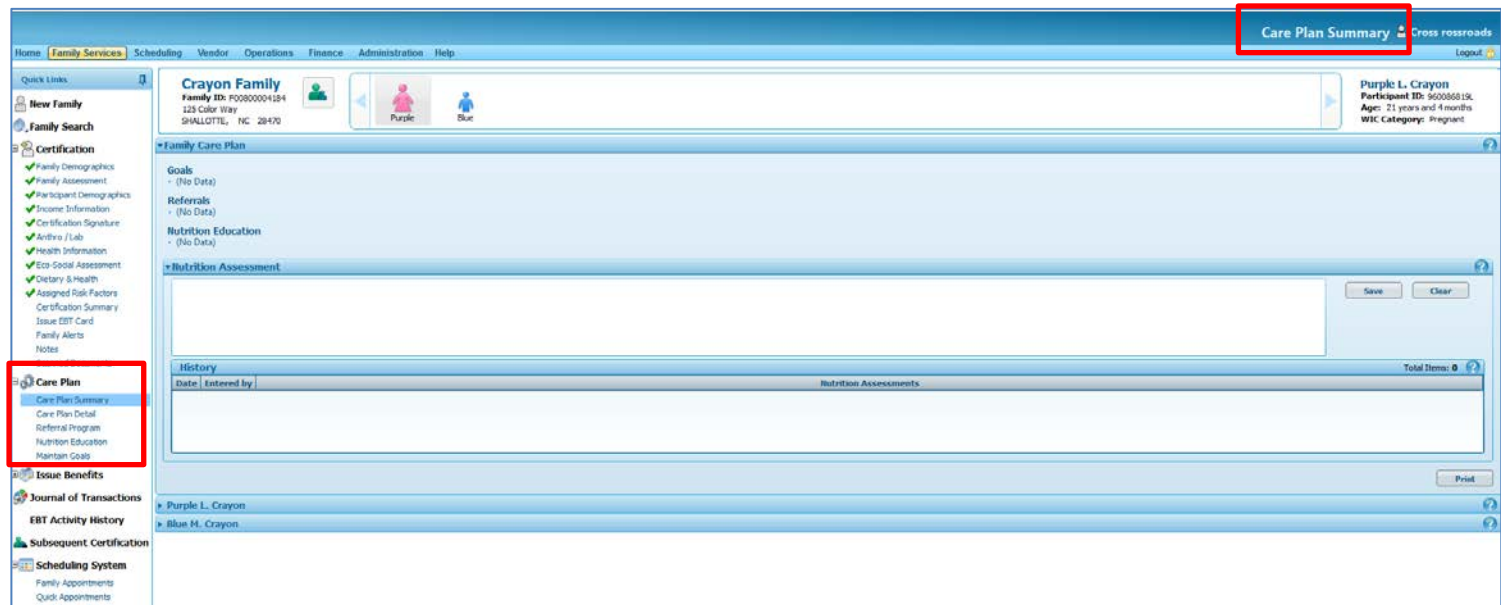
19. North Carolina policy recommends all questions be addressed.

20. The **Assigned Risk Factors** screen will be completed by the CPA.



21. The **Care Plan** screens will be completed by the CPA.

22. The entire **Care Plan** is required for Certification. The sections include:
- Goals
 - Nutrition Education
 - Referrals



23. The **Maintain Goals** screen will be completed by the CPA.

The screenshot shows the 'Maintain Goals' interface. At the top right, the 'Maintain Goals' tab is highlighted with a red box. The main content area is titled 'Maintain Care Plan Goals' and includes a 'Family Goals' section with the following items:

- Assure immunizations are up-to-date
- Avoid harmful foods/non-food items
- Decrease TV/screen time
- Eat healthy meals and snacks regularly
- Eat more fruits and vegetables
- Eat more whole-grain foods
- Follow food safety recommendations
- Follow weight gain/maintenance recommendations
- Increase physical activity
- Make smart drink choices
- Plan, fix and eat meals and snacks as a family
- Reduce lead exposure
- Reduce exposure to second-hand smoke
- Serve age-appropriate foods and portions
- Take care of teeth and gums
- Take/give recommended vitamins/supplements

Below the family goals, there are sections for 'Individual Goals' for 'Purple L. Crayon' and 'Blue H. Crayon'. At the bottom right, there are buttons for 'Add Goals' and 'Add Free Form Goal'.

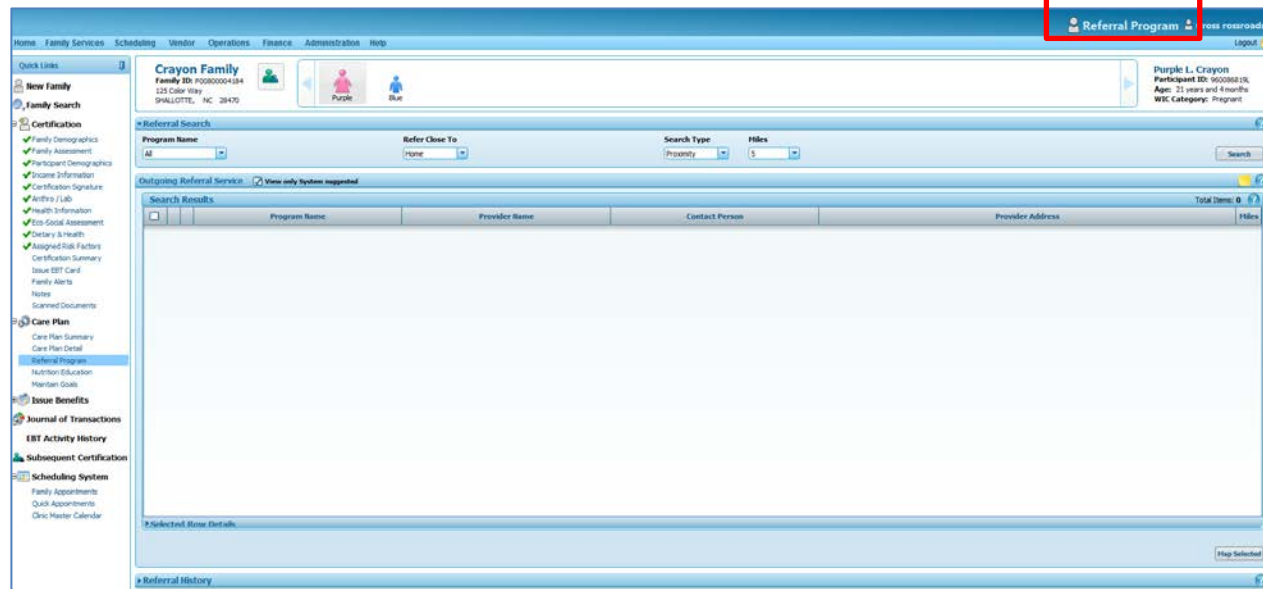
24. The **Nutrition Education** screen will be completed by the CPA.

The screenshot shows the 'Nutrition Education' interface. At the top right, the 'Nutrition Education' tab is highlighted with a red box. The main content area is titled 'Nutrition Education' and includes a 'Filter By' section with 'Family' and 'Individual' options. Below this is a table of 'Nutrition Education Topics'.

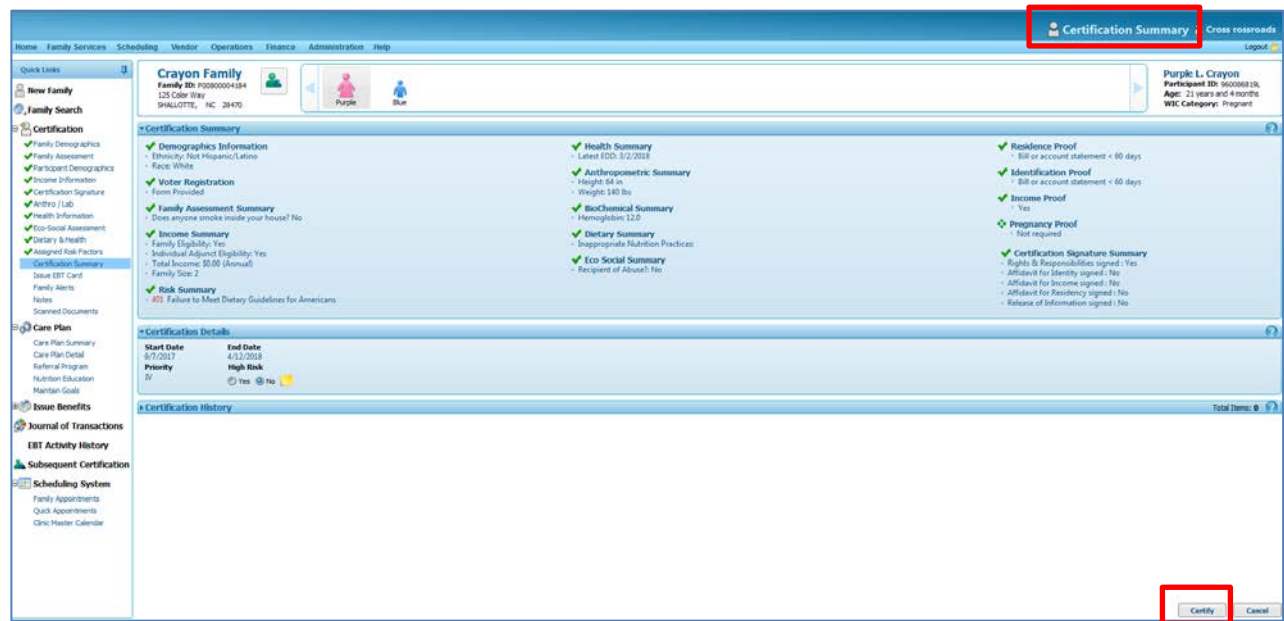
Topic	Method	AB	Purple L. Crayon	Blue H. Crayon
A - Immunizations		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
A - Tobacco, Alcohol and Illegal Drugs		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Age-appropriate Portions		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Be Healthy with Fruits and Veggies (wichealth)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Choose HyPlate to Build a Healthier Family (wichealth)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eat Well - Spend Less (wichealth)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Eating Well on a Budget		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Family Meals		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Farm to Family: Keeping Food Safe (wichealth)		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Fast Food Choices		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

At the bottom right of the table, there are buttons for 'Schedule' and 'Complete'. Below the table, there are sections for 'Topic Status' and 'Refusal History'. At the very bottom, there are buttons for 'Refresh Online Education', 'Refuse', and 'Cancel'.

25. The **Referral** screen will be completed by the CPA.



26. The **Certification Summary** screen will be reviewed by the CPA.



27. The **Certification Summary** screen provides an overview of the certification process. A green check mark (✓) indicates completion and a red x indicates incompleteness. When all required sections are completed, the CPA will click the Certify button.

28. The **Prescribe Food** screen will be completed by the CPA for each participant in the family.

Note: Please refer to the **Modifying Food Packages** resource for additional information.

The screenshot shows the 'Prescribe Food' interface for a pregnant participant. The top navigation bar includes 'Home', 'Family Services', 'Scheduling', 'Vendor', 'Operations', 'Finance', 'Administration', and 'Help'. A 'Prescribe Food' button is highlighted in a red box in the top right corner. The main content area displays the following information:

- Family Information:** Crayon Family, Family ID: F0200004124, 125 Cole Way, SHALLOTTE, NC 28470.
- Participant Information:** Purple L. Crayon, Participant ID: 9620088126, Age: 21 years and 4 months, WIC Category: Pregnant.
- Food Prescription:** Food Prescription Date: 9/7/2017, WIC Category: Pregnant, Family Issuance Day: 7, Issuance Frequency: 3 Month(s).
- Food Prescription Items Table:**

Category	Subcategory	Quantity	Category Max Quantity	UOM
Eggs	Egg Grade A Large White	1	1	Dozen
Breakfast Cereal	Breakfast Cereal	36	36	Ounces
Legumes	Beans/Peanut or Peanut Oil	2	2	Containers
Bread/Whole Grains	W/ Bread or Whole Grains	16	16	Ounces
Fruit & Vegetable C/8	Fruit and Vegetables	\$11.00	\$11.00	\$\$\$
Juice - 48 oz	Juice 48 oz Flavored Conc.	3	3	Containers
MB - Fat Reduced	Skim Non Fat or 1% MB	5.50	5.50	Gallons
- Add Item to Food Prescription:** A form with fields for Category, Subcategory, Quantity (0), Max / Mod Max, and UOM, with 'Add Item' and 'Clear' buttons.

The screenshot shows the 'Prescribe Food' interface for a child participant. The top navigation bar is the same as the previous screenshot. A 'Prescribe Food' button is highlighted in a red box in the top right corner. The main content area displays the following information:

- Family Information:** Crayon Family, Family ID: F0200004124, 125 Cole Way, SHALLOTTE, NC 28470.
- Participant Information:** Blake M. Crayon, Participant ID: 9620084200, Age: 2 years and 3 months, WIC Category: Child.
- Food Prescription:** Food Prescription Date: 9/7/2017, WIC Category: Child, Age Category: 2 yr to 5 yr, Family Issuance Day: 7, Issuance Frequency: 3 Month(s).
- Food Prescription Items Table:**

Category	Subcategory	Quantity	Category Max Quantity	UOM
Eggs	Egg Grade A Large White	1	1	Dozen
Breakfast Cereal	Breakfast Cereal	36	36	Ounces
Legumes	Beans/Peanut or Peanut Oil	1	1	Containers
Bread/Whole Grains	W/ Bread or Whole Grains	32	32	Ounces
Fruit & Vegetable C/8	Fruit and Vegetables	\$8.00	\$8.00	\$\$\$
Juice 64	Juice 64 oz Flad	2	2	Containers
MB - Fat Reduced	Skim Non Fat or 1% MB	4	4	Gallons
- Add Item to Food Prescription:** A form with fields for Category, Subcategory, Quantity (0), Max / Mod Max, and UOM, with 'Add Item' and 'Clear' buttons.

29. The **Issue EBT Card** screen will most likely be completed by support staff.

Note: Please refer to the **Food Benefits Issuance** resource for additional information.

Home Family Services Scheduling Vendor Operations Finance Administration Help

Issue EBT Card Cross roads Logout

Quick Links

New Family

Family Search

Certification

Family Demographics

Family Assessment

Participant Demographics

Income Information

Certification Signature

Arthro / Lab

Health Information

Eco-Social Assessment

Dietary & Health

Assigned Risk Factors

Certification Summary

Issue EBT Card

Family Alerts

Notes

Scanned Documents

Care Plan

Issue Benefits

Journal of Transactions

EBT Activity History

Subsequent Certification

Scheduling System

Family Appointments

Quick Appointments

Clinic Master Calendar

Crayon Family

Family ID: F00000004184

125 Color Way

SHALLOTTE, NC 28470

Blue M. Crayon

Participant ID: 9600868200

Age: 2 years and 3 months

WIC Category: Child

EBT Cards

Select Cardholder

Purple Crayon (Parent/Guardian) Card Number

Active EBT Cards

Cardholder Name	Card Number	Issued Date	Action	Action
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Total Items: 0

EBT Card History

Card Number	Cardholder Name	Issue Date	Deactivated Date	Deactivation Reason
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Total Items: 0

Data accurate as of 9/7/2017 3:44:28 PM

Save Cancel

30. The **Issue Food Instruments** screen will most likely be completed by support staff.

Note: Please refer to the **Food Benefits Issuance** resource for additional information.

Issue Food Instruments Configuration

Family Issuance Day: 7 | Issuance Frequency: 3 Month(s)

Category	Participant	Certification End Date	Sep	Oct	Nov	Total Items: 2
<input checked="" type="checkbox"/> Pregnant	Purple L. Crayon	4/12/2018	Full	Full	Full	Change Rx
<input checked="" type="checkbox"/> Child	Blue M. Crayon	9/6/2018	Full	Full	Full	Change Rx

Food Category	Subcategory	Quantity	USDF	Total Items: 8
Milk - Fat Reduced	Skin/Non Fat or 1% Milk	9.50	Gallons	Change Rx
Fruit & Vegetable CVB	Fruit and Vegetables	\$19.00	\$\$\$	
Juice 64	Juice 64-oz Fluid	2	Containers	
Bread/Whole Grains	WW Bread or Whole Grains	48	Ounces	
Eggs	Eggs Grade A Large White	2	Dozen	
Breakfast Cereal	Breakfast Cereal	72	Ounces	
Legumes	Beans/Peas or Peanut Str	3	Containers	
Juice - 48 oz	Juice 48oz 8/12oz Conc	3	Containers	

Food Benefits Issuance Signature Confirmation

Have the family confirm receipt by signing electronically for checks 135266151 - 135290153. To sign later click the Sign Later button.

Food Benefits Signed/Received by:

- Purple Crayon (Parent/Guardian)
- Unassigned Staff

Buttons: Clear, Sign, Sign Later

Status Message: EBT benefits were sent successfully.

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

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

Quick Appointments Crossroads

Home Family Services Scheduling Vendor Operations Finance Administration Help

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
 - Assessment Role Factors
 - Certification Summary
 - Issue EBT Card
 - Family Alerts
 - Notes
 - Scanned Documents
- Care Plan
- Issue Benefits
 - Prescribe Food
 - Issue Food Instruments
 - Issue FM Food Instruments
 - Food Instrument List
 - Replace Current Benefits
 - Exchange/Increase Formula
- Journal of Transactions
- EBT Activity History
- Subsequent Certification
- Scheduling System
 - Family Appointments
 - Quick Appointments
 - Clinic Master Calendar

Crayon Family
Family ID: F0080004184
125 Color Way
SHALLOTTE, NC 28470

Purple L. Crayon
Participant ID: 960088105
Age: 21 years and 4 months
WIC Category: Pregnant

Search Options

Start Date: 11/20/2017
End Date: 12/17/2017

Day of Week: S M T W Th F Sa
 S M T W Th F Sa
 Include Overbooking

Preferred Language: English
Preferred Time: Any
Clinic: 010-03 - Brunswick - Shalotte

Appointment Types	Individual	Appointment Type	Duration	High Risk	WIC Category	Status	Certification End Date
<input checked="" type="checkbox"/>	Blue M. Crayon	Food Benefit Issuance	15	<input type="checkbox"/>	Child	Active/Certified	9/8/2018
<input checked="" type="checkbox"/>	Blue M. Crayon	Nutrition Education - Individual	15	<input type="checkbox"/>	Child	Active/Certified	9/8/2018
<input checked="" type="checkbox"/>	Purple L. Crayon	Food Benefit Issuance	15	<input type="checkbox"/>	Pregnant	Active/Certified	4/12/2018
<input checked="" type="checkbox"/>	Purple L. Crayon	Nutrition Education - Individual	15	<input type="checkbox"/>	Pregnant	Active/Certified	4/12/2018

Go To Clinic Master Calendar