

## Step 1: Download the "Detailed and Summary Participants Who Failed to Pick Up Benefits" report from Crossroads as an Excel Document.

Operations > Reporting > Generate Reports > Caseload > Detailed and Summary > Detailed and Summary Participants Who Failed to Pick Up Benefits... should be the first report if they are sorted alphabetically.

Use the following parameters:

- State: North Carolina WIC Program
- Report Type: Clinic
- Local Agency/Clinic: Choose your clinics
- Reporting Month: select the month that has recently ended


For more information regarding this report, please see pages 3-4 of the following document:  
<https://www.nutritionnc.com/wic/pdf/CrossroadsReportsTrainingHandout.pdf>

## Step 2: Copy all rows of participants whose last day to spend (LDTS) falls within the last 90 days.

Copy cells starting in column B, row 20 through column U until the last row of participant information you wish to include on the log for investigation. We recommend at least participants  $\leq 90$  days late.

## Step 3: Paste copied cells into the "Reconciliation Log" tab of this document beginning at column A, row 7.

Use the "Paste Values" function for the best appearance and to preserve all features of the file.

Place the cursor in the first cell of the blank log (column A, row 7) and right-click in the cell to access the "Paste Values" function (indicated as a clipboard with "123") which will copy all selected information onto the log. 

\* Please note that not all information copied from the "Detail and Summary Participants Who Fail to Pick Up Benefits" report will be visible in the "Reconciliation Log".

This will fill columns A through T of the log.

## Step 4: Complete "Reconciliation Log".

Use the dropdown functions within columns U through AA of the document to capture information about your contact with participants who have failed to pick up their benefits. Some dropdowns include many answers; after clicking, you may need to scroll to see all options.

- Column U – Missed Appointment Type
  - If the participant’s failing to pick up the most recently available benefits was the result of a missed appointment, elect the appointment type that was missed. If your clinic uses open access appointments or walk ins, you may select “Did not have an appt”.
- Column V – Date Contacted
  - The dropdown will only show the current calendar date as an option. Should you need to pre or post date any contacts, you may type in the appropriate date.
- Column W – Contact Result
  - Select the appropriate result of the phone call.
- Column X – Reason Given for Not Participating
  - Select the reason given by the participant for choosing not to participate in WIC. If more than one reason is given, ask the main reason and select it.
  - Reason Given for Not Participating dropdown options include the following:
 

unknown - unable to reach family	fear due to immigration issues
forgot about appt/unintentional miss	using foodbank instead of
child sick	WIC food benefits
work / school conflict	poor food and formula choices
transportation difficulty	shopping issues
no longer in need of benefits	clinic wait time too long
recently moved out of area	poor customer service
believed no longer eligible	no reason given
  - Not all options will be immediately visible when the dropdown menu is opened. Use the scroll bar to see all possible answers.
- Column Y – Action Taken
  - This column may not have an answer filled in based on the Contact Result.
  - Select the drop-down choice that reflects the action taken by the staff who made the call.
- Column Z – Nutrition Education Provided?
  - Select whether nutrition education was provided during the contact. It will not be appropriate or necessary for all participants to receive education over the phone; however, if the missed appointment type in a nutrition education contact and the participant is considered a low-risk individual, nutrition education may be provided, and benefits may be issued.
- Column AA – Benefits issued
  - Select the appropriate response based on whether and how many months’ worth of benefits were issued remotely to the participant on the day of the call. Only select yes if food benefits are issued during the phone contact.

Step 5: Switch to the "Results Summary" tab to see trends in your data!