This resource provides an overview and step-by-step instructions for operationalizing WIC Birthday Card mailings to increase WIC child retention.

The age-specific birthday cards include bold colors and fun pictures intended to help families celebrate an existing milestone, while also reminding them about the benefits of WIC. The inside of the card contains messaging about the core functions of WIC and a reminder about eligibility.

WIC Birthday Cards:
- Are available for ages 1 to 4
- Are available in English and Spanish versions
- Include a blank envelope for each card
- Are designed for customization at the local level

Instructions for Mailing WIC Birthday Cards

Crossroads cannot generate a report that lists participants by birth date and address. Local agency staff must utilize the family search feature in Crossroads to locate children with recent and upcoming birthdays and obtain addresses.

Large agencies must consider the time and resources needed to operationalize mailings. Consider beginning birthday card mailings targeted to a specific age group. For example, investigate participation trends and mail birthday cards to the participants in the age group demonstrating the greatest decline in participation. Local agencies need to determine the best approach to batch mailings based on clinic size, staffing and workflow.

Local agency staff need to determine the frequency of the mailings (e.g. daily, weekly, monthly, every other month).

In this scenario, the Local Agency decides to do a weekly mailing for all 1-4-year-old participants with birthdays between 11/1 and 11/8.

Step 1: Navigate to the Family Search feature. Select the appropriate Clinic and check the Participant search type.
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**Step 2:** Navigate to the **Date of Birth** field.

Check the box next to **Date of Birth** to show only those participants with that exact birthdate. For example, if staff would like to pull records for all children turning two years old on 11/1, staff would enter 11/1/17.

![Image of Family Search interface with Date of Birth filter highlighted]

**Step 3:** Click the **Search** button. The results will populate with children that fall within the specified search criteria. In some cases, the participants may be “active”. In these instances, sending a birthday card is a great way to acknowledge their continued participation on the program. In other cases, you may see that someone is no longer certified. Consider investigating the participant record – it may be a good opportunity to send a card as a reminder of WIC services and benefits.

**Step 4:** After conducting a search, click **Selected Row Details**, and a drop down of information will appear. This is one place where you can view the mailing address.

![Image of selected row details highlighting the mailing address]
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Step 5: There are three options for generating address labels in Crossroads for the birthday cards.

1. Batch print labels using the Print/Export Labels feature. From the Family Search Screen, click the Print/Export Labels button.

   A mailing label addressed to the Parent/Guardian 1 will be printed for each participant generated in the search.

   Select **Print Label Type** (the type of address label template being used).

   Select the **Next Label Across** number (the column of the address label sheet where you want printing to start). Select the **Next Label Down** number (the row of the address label sheet where you want printing to start). If you have a full label sheet, select 1 for both fields. Load the labels into the printer and click **Print**.
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2. Print labels individually for each participant. Go into the participant record. From the Family Demographics screen, click the Print/Export Labels button to generate an address label.

Follow the instructions listed in step 5 (page 3) to select the Print Label Type, Next Label Across and Next Label Down fields. Load labels into the printer and click Print.

3. Address envelopes by hand. While time consuming, addressing envelopes by hand provides a personal touch and may decrease the likelihood that the card is thrown away with other junk mail.

Note: In order to capture all children ages 1-4 with a birthday on 11/1, complete steps 1-5 for each of the following dates of birth: 11/1/2018, 11/1/2017, 11/1/2016, and 11/1/2015. Furthermore, repeat the process for all dates between 11/1 and 11/8.