

Guidance for Crossroads Upgrade to Version 1.15

Implementation Date: September 11, 2017

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Overview

The North Carolina Women, Infants, and Children (WIC) Crossroads system will release a new software version to local agency users on Monday, September 11, 2017.

This document provides information about software changes (enhancements, changes, and bug fixes) that impact the NC WIC Program Crossroads System and are included in Release 1.15. The first section describes new functionality. The second section describes fixes to existing defects. The third section lists the status of known issues and guidance for local agency staff to address known issues. This guidance document **replaces** the **Crossroads Upgrade 1.14 Guidance** document dated 7.12.17 which may be recycled. A summary of changes is listed on page three (3).

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. If you have questions regarding any policy aspect of this document, please contact your Regional Nutrition Consultant.

Summary of Changes: Guidance for Crossroads Upgrade

Page 4 – **New and Revised Functionality**

- Federal Regulation Risk Code Changes
- Initiation and Duration of Breastfeeding Data
- EBT Functionality

Page 7 – **Six (6) Existing Defects Fixed** in Version 1.15

New Known Issues and FAQs:

Page 13 – Assigned Risk

- 1 new known issue: Risk factor 601 appearing for pregnant women who have never breastfed

Page 14 – Anthro/Lab

- 1 new known issue: Lead value errors

Page 17 – Care Plan

- 1 new known issue: Assigned Goals History

Page 26 – Issuance

- 1 new known issue: MFIs unable to be matched

Page 27 – Exchange/Increase or Add Formula

- 1 new known issue: Add formula feature not functioning as expected

Page 28 – Transfer

- 1 new known issue: Into State Transfer certification end date error

Page 30 – Notifications

- 1 new known issue: Incorrect certification end date on notification

New Functionality in Version 1.15.2

Federal Regulation Risk Code Changes

Federal regulations have been modified for risk factor 135 – Inadequate Growth and risk factor 352 – Infectious Diseases. Crossroads has been modified to reflect the regulation changes. The Assign Risk Factor and Care Plan screens should reflect the old versions of the risk factors that were assigned before the 1.15 upgrade was implemented. Risk factors assigned after the upgrade should appear in the new format and be based on the new criteria.

The title of risk factor 135 – Inadequate Growth has been changed to **Slowed/Faltering Growth Pattern**. This is a system-assigned risk factor. It cannot be assigned or overridden by the CPA. Infants under six months of age will be system-assigned risk code 135 if they meet one of the following criteria:

- Infants from birth up to, but not including, 2 weeks of age if the infant's weight loss in this age range is $\geq 7\%$ of their birth weight. Crossroads will compare the Weight entered on the Anthro/Lab screen to the Birth Weight entered on the Health Information screen.
- Infants from 2 weeks old up to, but not including 6 months of age, if any weight loss occurs between two separate weight measurements taken at least 8 weeks apart. The system will compare any two Weights, entered on the Anthro/Lab screen, where the measurement dates are at least 8 weeks apart and were taken when the baby's age is greater than or equal to 2 weeks and less than 6 months. The birth weight is not used as one of the weights in determining weight loss in this age category.

Please note this risk factor does not apply to infants 6 months of age or older.

Risk factor 352 – Infectious Diseases has been split into two separate risks to categorize infectious disease as acute or chronic.

Risk Factor 352a – **Infectious Disease – Acute**: This risk factor will be assigned by the system when the user selects 'Infectious Disease – Acute' from the Source List available in the Medical Health Conditions multi-select slider on an infant's, child's or woman's Health Information screen. It can also be assigned by the CPA when the user selects one of the following:

- 352a from the Risk Code dropdown list in the Quick Entry section of the Assigned Risk Factors screen OR
- 'Infectious Disease – Acute' from the Description dropdown list in the Quick Entry section of the Assigned Risk Factors screen.

Risk Factor 352b – **Infectious Disease – Chronic**: This risk factor will be assigned by the system when the user selects 'Infectious Disease – Chronic' from the Source List available in the Medical Health Conditions multi-select slider on an infant's, child's or woman's Health Information screen. It can also be assigned by the CPA when the user selects one of the following:

- 352b from the Risk Code dropdown list in the Quick Entry section of the Assigned Risk Factors screen OR
- 'Infectious Disease – Chronic' from the Description dropdown list in the Quick Entry section of the Assigned Risk Factors screen.

Initiation and Duration of Breastfeeding Data

Changes have been made to the **Breastfeeding Information** container so that more data can be collected about the initiation and duration of breastfeeding. Answers to the following questions will now be required if the answer to **Ever Breastfed?** is **Yes**:

- Age Infant Stopped Breastfeeding
- Reason Infant Stopped Breastfeeding

Please note that the question **Ever Breastfed?** is currently defaulting to **Unknown**. The CPA or Breastfeeding Peer Counselor must select **Yes** for the age and reason questions to become required. Additional changes will be made in a future upgrade so that there is no default answer to **Ever Breastfed?** and a response to the question will be required.

EBT Functionality

1.15.2 includes functionality designed to migrate Crossroads from paper to Electronic Benefit Transfer (EBT). These features are now in place even though Crossroads is not issuing through EBT at this time. EBT will be enabled in the Pilot region in October 2017. Training, documentation and resources related to EBT functionality will be made available to the Pilot region before EBT enablement. Training, documentation and resources related to EBT functionality will be made available to Rollout regions before Rollout.

The most apparent change to local users during this upgrade are the **food set-up changes** that are necessary to prepare the Crossroads system to issue EBT in October. These food set-up changes mean that effective Monday, September 11, 2017 ALL participants will need a new food prescription. This action must be done by a CPA and is completed on the Prescribe Food screen. The CPA will need to tailor the food prescription to match the participant's previous selections or discuss with them any tailoring they would like (i.e., lactose free milk, cheese, yogurt, etc.). Additionally, any infant package receiving formula will default to Similac Advance. A CPA will need to re-prescribe any Infant Formula, Exempt Formula or WIC Eligible Nutritionals that participants requires. New medical documentation is NOT required. Please see the resource **Issuing New Food Prescriptions to ALL Participants** that was sent with this upgrade document and is also available on nutritionnc.com.

Existing Defects Fixed in Version 1.15

Fixes to existing functionality include the following information:

- Title/summary
- Details of the defect that was fixed

If you experience additional instances of any defects that are listed as fixed, please contact the Nutrition Services Branch (NSB) Customer Service Desk at 919-707-5795.

Certification Summary

Fixed! unable to certify/issue to child 4y 11m ~28d

Details: Local users started a Subsequent Certification on a child who was turning five. When they navigated to the Certify button they found it greyed out and child could not be issued to. Received message "Certification dates cannot be processed due to ineligible category." Users expected child to be subsequently certified and issued 1 month FIs.

Prescribe Food

Fixed! Breastfeeding <= MMA mom of twins assigned Fully Formula Fed package

Details: On the Prescribe Food screen, mom of twins has WIC Category = BF, BF status = Partially BF <=MMA. On the Issue Food Instruments screen, food issuance should be "Full" and mom should be issued food, but mom is greyed out and has "Fully Formula Fed" indicator.

Care Plan

Fixed! Hyperlinks on Care Plan Summary are not active except for Assigned Risk Factors

Details: When viewing the Care Plan Summary for the Individual, the user should be able to click on the headings (Anthropometrics, Biochemical, Eco-Social, etc.) and a hyperlink will bring the user to that particular screen. This was not working except for Assigned Risk Factors.

Fixed! Nutrition Education is missing if a subsequent certification is completed early

Details: If a participant (infant or child) is subsequently certified within 30 days before their current certification's end date, the completed nutrition education does not show in the Care Plan, but is stored in History. Women participants are not affected, because their sub-cert period starts the day their category changes.

Transfers

Fixed! New risk factor(s) not appearing on the Care Plan

Details: If a risk code is added to a participant's record *before the certification period*, it will not appear on the Care Plan Summary-Individual or the Care Plan Detail. It will only be listed on the Assigned Risk Factors screen.

Breastfeeding Care Plan and Supplies

Fixed! Breast Pump returned date is inaccurate in Journal of Transactions (JOT)

Details: Local users report that a pump's return date is listed in the JOT as the date that it was issued.

Known Issues

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 on the NSB website 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 choose whether to purchase the regular milk (or not) 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 Nutritionals:
 - 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 over-issuance in Crossroads. The alert should include: MFIs were given to [which family members] for [which months] and for what reason.
- Current month MFIs may not be able to be matched if the food prescription date is not before or matching the issuance day and certification date in Crossroads.
- Match the MFIs for months 2 and 3, if issued. If no MFIs were issued, print and mail FIs or contact participant to come in for issuance.
- 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.
- MFIs that cannot be matched should be documented in the Care Plan. They may be reported as a valid issuance on the Unmatched Redemption report.

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.

Family Demographics

Frequently Asked Questions:

Question 1: What should I do if an infant or child’s Parent/Guardian 1 changes?

Guidance: If the legal custody of an infant or child changes, **do NOT change the Parent/Guardian 1 information.** Use the **Transfer** feature to transfer the participant(s) to a new family. If the custody has not been legally changed, use the **Parent/Guardian 2** or **Caretaker** containers for additional family members.

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: **Family Assessment Questions.**

Participant Demographics

Crossroads 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: **CNDS. Please NOTE:** Duplicate records can now be processed by Crossroads. See page 9 of the **CNDS** reference for the form to fill out and fax to the NSB Customer Service Desk.

Frequently Asked Questions:

Question 1: How can local users correct a woman’s WIC Category?

Guidance: Staff must take great care to select the correct WIC Category at initial and subsequent certification. If the wrong category is selected in error, please refer to the following guidance available on the NSB website: **Category Change.**

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: **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: 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.

Known Issues:

OLV Returns “Not enrolled” Message BUT NC Tracks Documents Child as Enrolled

Details: Local users report that verifying Medicaid using OLV returns a “not enrolled” message, but verifying the family using NC Tracks documents their enrollment. This is rare.

Workaround: Verify Adjunctive Eligibility by selecting the “WIC Staff verified using NC Tracks” option of the Verification Document drop-down list. If adjunctive eligibility is verified using another method, document that method. Report the issue to the NSB Customer Service Desk.

Expected resolution: May continue to occur periodically.

Anthro/Lab

Frequently Asked Questions:

Question 1: What should I do if a growth chart does not plot correctly?

Guidance: This is extremely rare but has been reported. Use a paper chart to assess the participant's growth. 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: What should I do if the Anthro/Lab screen has all the required information but the green check mark doesn't appear, the star remains?

Guidance: This is also rare but has been reported. Some local users report that if they go back in to the Anthro/Lab screen and **re-enter the Weight first and then the Height** that the green check mark appears.

Question 3: 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 4: 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 or hit the delete button 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:

New! Lead value errors

Details: A participant's lead lab value is 4.88 but the system will not take decimals.
Workaround: Use rounding to enter lead levels on the Anthro/Lab screen: if <.5, round down; if >/.5, round up, except for >4.5, in which case enter 4 or the risk code (211) will be triggered. Document the complete lead value including decimals in the Care Plan.
Expected resolution: This issue is under investigation.

Pre-pregnancy BMI errors

Details: 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). This is only an issue if the pre-pregnancy and postpartum heights are different.
Workaround: 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 Assigned Risk Factors screen and document in the Care Plan.
Expected resolution: This issue is under investigation.

Health Information

Frequently Asked Questions:

Question 1: How do local users answer the questions in the "Infant" tab in the Breastfeeding Information container after a fetal death?

Guidance: An "Infant" tab is created for Non-Breastfeeding Postpartum Women with the following Birth Outcomes: Fetal Death, Miscarriage, Neonatal Death.

The Breastfeeding Information does **NOT** need to be completed to save the Health Information screen. Once the birth outcome is designated Fetal Death, Miscarriage, or Neonatal Death, the yellow stars next to the Breastfeeding questions disappear. The only star that remains is the Breastfeeding Information Data Collection Date (this should auto-populate with the current date). Even after the woman is certified as Non-Breastfeeding, the "Infant" tab remains on the Health Information screen.

Known Issues:

Incomplete star on health information screen

<p>Details: During initial certification or subsequent certification, Health Information screen remains starred. Certification cannot be completed. Please NOTE: using the preferred work flow of certifying Mother first THEN Infant seems to avoid this issue.</p>
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<p>Workaround: Call the NSB Customer Service Desk the same day the issue occurs and request their assistance in completing the certification.</p>

<p>Expected resolution: This issue is under investigation.</p>

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.

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).

Frequently Asked Questions:

Question 1: How do local users assign risk codes 601 (Breastfeeding Mother of Infant at Nutritional Risk) and 602 (Breastfeeding Complications or Potential Complications) to pregnant women?

Guidance: Crossroads was modified to reflect federal regulation changes with the upgrade to 1.12. Pregnant women can be assigned risk code 601- Breastfeeding Mother of Infant at Nutritional Risk if they meet all the following criteria:

- Pregnant woman with a dyad link to an infant who is prescribed a fully or partially BF package
- The dyad-linked infant has a risk code in addition to 702
- On the woman's Health Information screen, there is a checkmark in the **Currently Breastfeeding?** Box.

Pregnant women can be assigned risk code 602- Breastfeeding Complications or Potential Complications if they meet the following criteria:

- Pregnant woman with a dyad link to an infant who is prescribed a fully or partially BF package
- On the woman's Health Information screen, there is a checkmark in the **Currently Breastfeeding?** box
- Under Breastfeeding Information, there is at least one complication chosen and saved from the Source list (system-assigned 602) OR the CPA has navigated to the Assigned Risk Factors screen and assigned 602 (CPA-assigned 602).

Assigned Risk (continued)

Known Issues:

New! Risk factor 601 appearing for pregnant women who have never breastfed.

Details: Local users are reporting pregnant women with the assigned risk factor of 601- Breastfeeding Mother of Infant at Nutritional risk. However, their infant is not breastfeeding and has not ever been breastfed. Local users have attempted to delete the risk factor but it comes back after saving.

Workaround: 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).

Expected resolution: Will continue to occur periodically.

Risk code 503 (Temporary Certification) can't be completed

Details: A pregnant woman with a temporary certification risk code returns to clinic with an infant before completing her pregnant certification. Local user attempting to complete the temporary certification receives a validation summary that the EDD cannot be in the past.

Workaround: Terminate the pregnant woman and apply for a Subsequent Certification. For 503s, this can be done on the same day.

Expected resolution: Will continue to occur periodically.

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

Details: These risk codes are not System Assigned now. In other words, the system does not automatically calculate the gain or loss and trigger a risk code assignment.

Workaround: The CPA must assign these risks on the Assigned Risk Factors screen.

Expected resolution: This issue is under investigation.

Risk Code 135 (Slowed/Faltering Growth Pattern) not assigning as expected

Details: 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 but different values when displayed in grams.

Example:

In pounds/ounces: Expected gain is 3lb 14 oz. and actual weight change displayed is 3lb 14oz.

In grams: Expected gain is 1,766.5 g. and actual weight change is 1,757.67 total g.

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.

Certification Summary

Certifications require that several 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.

Frequently Asked Questions:

Question 1: How do I complete a temporary certification (Risk Code 503)?

Guidance: The CPA must take the following steps:

- Complete starred/required fields on the Family Assessment, Anthro/Lab and Health Information screens
- Navigate to the Certification Summary screen and select the “Complete Assessment” button.
- If the “Complete Assessment” button is disabled, return to the Health Information screen.
- Select “Not required” from the Proof of Pregnancy drop down list and select “Save.”
- Navigate to the Certification Summary screen and select the “Complete Assessment” button.
- Crossroads will fully certify the pregnant woman based on Certification End date rules for pregnant women.

Question 2: How do local users revise an EDD that has changed by more than 4 weeks, so that the prenatal certification end date is correct?

Guidance: It may not be necessary to change the EDD on the **Health Information** screen unless it is more than 6 weeks AFTER the initial EDD. Instead, users should document the new EDD in the participant’s care plan and plot growth charts manually. A Family Alert may also be helpful.

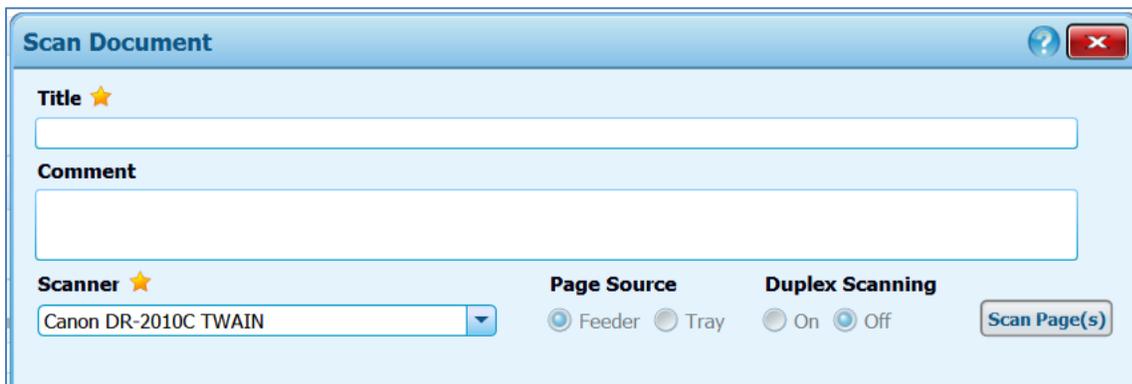
If the new EDD is more than 6 weeks AFTER the initial EDD (or a prenatal certification end date is incorrect because of user error): document the new EDD and/or certification end date in the participant’s care plan and plot growth charts manually. If mom’s cert expires before she delivers, issue PN MFIs and document the issuance and reason(s) in the care plan. If mom delivers before the cert expires, apply for subsequent certification.

Question 3: How do local users use the **Extend Certification** button?

Guidance: The **Extend Certification** button is available to users with a CPA role. The participant needing the one-time extension must meet three criteria: (1) must be an infant or child in an active certification period, (2) be within 30 days of the end of their certification and (3) have an appointment after the expired certification. The button is greyed out if the certification is already expired. Additional guidance will be provided later.

Scanning

1.15 has Multi-Page Scanning capabilities. However, it is not working well enough now to use it in Production. **Users must continue to scan one page at a time. Duplex Scanning should be OFF.** The steps to scan a document changed with the update to 1.10.2.4. When the **Scan Document** button on the bottom left of the screen is clicked, the paper is not scanned automatically. Instead a **Scan Document** popup appears as shown in the screenshot below. The user can title the document before or after the scan. The Page Source should be kept on **Feeder**. **Duplex Scanning should be OFF.** Make sure the document is in the scanner and click **Scan Page(s)**. **Please note:** Do not forget to save the scan AND save the screen where the document was scanned. There is no prompt to save if you do not save. Check that the scanned document has saved to the application.



Scan Document [?] [X]

Title ★

Comment

Scanner ★ Canon DR-2010C TWAIN

Page Source Feeder Tray

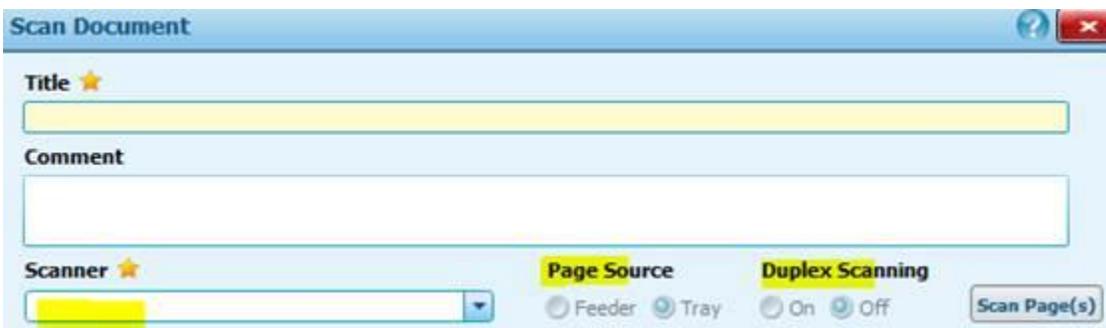
Duplex Scanning On Off

Scan Page(s)

Known Issues:

Question 1: Crossroads keeps giving me a scanning error. What can I do?

Guidance: Check to make sure that Crossroads has recognized your scanner. In the screenshot below, the scanner is not recognized: the **Scanner** field is blank and the radio buttons are greyed out. To fix this issue, log out of XRDS, **open the Scanner lid**, then log back into XRDS.



Scan Document [?] [X]

Title ★

Comment

Scanner ★

Page Source Feeder Tray

Duplex Scanning On Off

Scan Page(s)

Scanning Known Issues (continued):

Crossroads users that continue to have this issue should open their scanner lid to turn the scanner on **before** they log into Crossroads each day, to allow the Scanner to be recognized.

The scanner may also not be recognized by Crossroads if the local user ejects the device at the bottom of their screen, on the Windows work tray (as shown in the screenshot below). To fix this issue, **unplug the cable at the back of the scanner and plug it back in.**



Frequently Asked Questions:

Question 1: How can local users save scans for participants who are Expired?

Guidance: For expired participants/applicants, the Scan Document button is enabled on the Income Information screen, but is not available on any other screens. However, to save the Income screen, users must enter a family size and click Yes to the Question: No Income without Zero Income Declared Reason-Warning. After these steps are taken, the scanned document appears under Scanned Documents. IF the user scans a document on the Income Information screen and saves the Income screen without making other changes to the screen the scanned document is **NOT** listed under Scanned Documents.

NOTE: Scanning documents on the Income screen creates a line of history in the Income History container. This line may or may not correspond with a certification date, which can be confusing to the user and to future program monitors and fiscal auditors.

Question 2: Why can't users save documents scanned on the Anthro/Lab or Dietary & Health screens without also changing data on the screen?

Guidance: This is a known feature of Crossroads. If scanning can't take place while working and saving initially on these screens then the user must either change something on the screen to trigger the "dirty data" indicator OR the user can scan from another screen, such as: Health Information or Eco-Social. *Many local users have had success using the following workflow:*

1. **Scan the document FIRST** into the Anthro/Lab screen
2. Add the lab values and/or measurements **after the document has scanned**
3. **SAVE** the record.

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**

Reminders:

Only **Family** Goals and **Family** Nutrition Education will populate in the Family Care Plan. **Individual** Goals and **Individual** Nutrition Education are saved in the Care Plan for the individual.

The following changes were made to the Care Plan in April 2016:

1. On the Care Plan Detail screen and the Care Plan Detail and Summary Printouts, the Nutrition Assessment section has been moved to directly below the WIC Nutrition Risk and directly above Goals. **NOTE:** *Provider Name and Location* has also been moved but will be relocated in the future.
2. Goals, Referrals and Nutrition Education from a previous certification are not listed on the new Care Plan Summary of an individual, unless the same Goals, Referrals and Nutrition Education were chosen in the subsequent certification. Previously selected Goals, Referrals and Nutrition Education can be found in the History section.

Known Issues:

New! Assigned Goals History - previously selected goals missing

Details: Multiple local users from multiple agencies report that previously selected Goals are missing from the Assigned Goals History.
Workaround: There is no data fix. Users with this issue can look up previous goals in the individual's Care Plan History or Journal of Transactions. The resource Care Plan History is available on the NSB website.
Expected resolution: This issue is under investigation.

Referrals

Referrals are a required component of a WIC nutrition care plan. Based on the nutrition assessment, the CPA should refer each participant to appropriate health and social services. This referral should be documented in Crossroads, as well as later follow-up on the referral. Documenting referrals in Crossroads occurs on the **Referral Program** screen. For more information, please refer to the following guidance, available on the NSB website:

Documenting Referrals in Crossroads.

Frequently Asked Questions:

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

Guidance: QuitlineNC is listed with Wake County referrals. Select the following criteria in the Referral Search container to find it:

- UNCHECK the **View only System suggested** box
- **Program name** = Smoking Cessation
- **Refer Close to** = Other
- **Search Type** = County
- **County** = Wake

Question 2: Why isn't the referrals form more user-friendly?

Guidance: NSB has requested that the computer vendor adjust the referrals form template so that the referral agency address and phone number will show up on the form instead of the participant's. [new ticket xra6p-49](#)

Question 3: 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.

Nutrition Education

Support staff may provide the nutrition education such as a mini-lesson or may document completion of a wichealth.org lesson. The resource **Documenting Low-risk Nutrition Education** outlines how to complete the required documentation, and is available on the NSB website.

Prescribe Food

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

- **Change in Standard Milk Issuance**
- **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**
- **Issuing \$8 CVVs to Children in Crossroads**
- **Ordering Formula from NSB Due to Crossroads Transition**
- **Prescribing Food Packages to the BF Dyad**

Reminders:

On the Prescribe Food screen, the option of issuing a child food package to an infant when they are between the ages of 11 and 12 months was removed in April 2016. Only an infant food package is available for prescribing and issuing during this period. A child's food package will automatically be issued when the first date to spend is on or after the first birthday.

All instances of the food category name WIC Eligible Medical Foods (WEMF) have been changed to **WIC Eligible Nutritionals (WEN)**.

Frequently Asked Questions:

Question 1: How do I dismiss the message about medical documentation that has expired/is about to expire?

Guidance: Crossroads versions 1.10 and earlier displayed an informational message to users if a participant had medical documentation that has expired or will expire during the issuance period. The user could dismiss the message and issue benefits that did not include the expired medical food. As of 1.12, the same message displays, but Crossroads requires the user to complete 1 of 3 tasks:

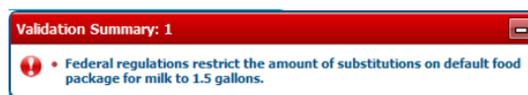
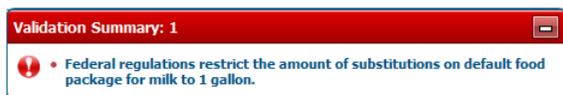
1. Modify the months of issuance to only issue benefits during the timeframe the medical documentation is valid.
2. Enter new medical documentation for the prescribed food subcategory so the system can issue the subcategory for all issuance months.
3. Create a new food prescription that does not contain the food subcategory that requires medical documentation.

NOTE: This new functionality applies to both normal food instrument issuance and to the issuance that can occur for those participants who have attended a nutrition education class.

Prescribe Food Frequently Asked Questions (continued):

Question 2: What do I do if I receive a validation message about restricting the amount of substitutions for milk to 1 gallon?

Guidance: Crossroads now enforces the maximum substitution rates of milk to the 4 quarts (1 gallon) and 6-quart (1.5 gallon) limits outlined in the final rule for Revisions in the WIC Food Packages released by the USDA on March 4, 2014. The final rule sets a maximum substitution limit on substitutes for milk. This requirement will limit the cheese, tofu and yogurt substitutions for milk to four (4) quarts (1 gallon) for children receiving Food Package IV and women receiving Food Package V and VI. Cheese, tofu and yogurt substitutions for milk are limited to six (6) quarts (1.5 gallons) for women receiving Food Package VII (regular or extended). If a user substitutes more than the maximum limits allowed for cheese, tofu and yogurt, a message will display as shown below. The user must adjust the amount substituted to the correct amount for the food package.



Please note: Additional quantities of tofu may be prescribed and issued above the Federal Guidelines for milk substitution of 4 quarts or 6 quarts, up to the maximum allowances for fluid milk for lactose intolerance or other reasons assessed and documented by the CPA. The Medical Documentation screen must be completed to prescribe more tofu than the Federal Guidelines for milk substitution. When a CPA is completing the Medical Documentation screen for additional quantities of tofu, "CPA assessed" may be written in the **Physician's Name** field and the CPA's phone number may be entered in the **Physician's Phone** field. **Expiration Date** and **Medical Reason** will vary by participant and assessment. The assessment must be documented in the participant's Care Plan.

Question 3: What should local users do if the foods on a FI print into the MICR line? (The few cases of this happening have occurred with families with a fully BF mom (extended package), an infant > 6 months old (3 kinds of infant foods) AND a child with 2 milk substitutions (soy-based beverage AND yogurt) AND the aggregated prescription included 2-4 legume/peanut butter and whole grain choices.

Guidance: By "choosing wisely" CPAs can decrease the number of legume/ peanut butter/ whole grain choices, and reduce the line count on the FI from 17 to 13. If FIs are already printed, other options include:

1. void FIs, deaggregate mom, reissue FIs to mom and then to children
2. void FIs, add a new RX to mom and/or child and make the legume/peanut butter and whole grain choices match each other so they don't print out on separate lines. Preview the FIs and COUNT the number of lines before printing to make sure there are <16 lines printing.
3. if the family has already left with the FIs, report the FI numbers to the Customer Service Desk.

Prescribe Food Frequently Asked Questions (continued):

Question 4: Most of the time the food prescriptions match on dyads, but occasionally there is a mismatch. How should local users resolve these mismatches?

Guidance: Best practice is to always enter prescriptions on infants first, then navigate to the mother, confirm her prescription and save. Some mismatches can be resolved by creating a new prescription on the current date for the infant (by selecting the green plus sign) and navigating to the mother's icon. A new (matching) prescription should auto-populate for the mother. Confirm the match by selecting save. If a mismatch cannot be resolved while the family is present in clinic, deaggregate the mother from the family on the **Issue FIs** screen and issue MFIs to the mother.

Question 5: Why isn't there a table for amounts of formula considered <MMA and >MMA?

Guidance: Because NC uses the rounding method for determining the Monthly Maximum Allowance (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 6: 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. How can users prevent this?

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. An alternative is to eliminate the dangling quart by prescribing 3 gallons lactose free/reduced milk, 1 pound of cheese and 1 quart of yogurt.

Question 7: 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 document in the Care Plan. Please see the NC WIC Program Manual, Chapter 7, Section 5.

Question 8: 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 due to their user role permissions. Is there a workaround for this?

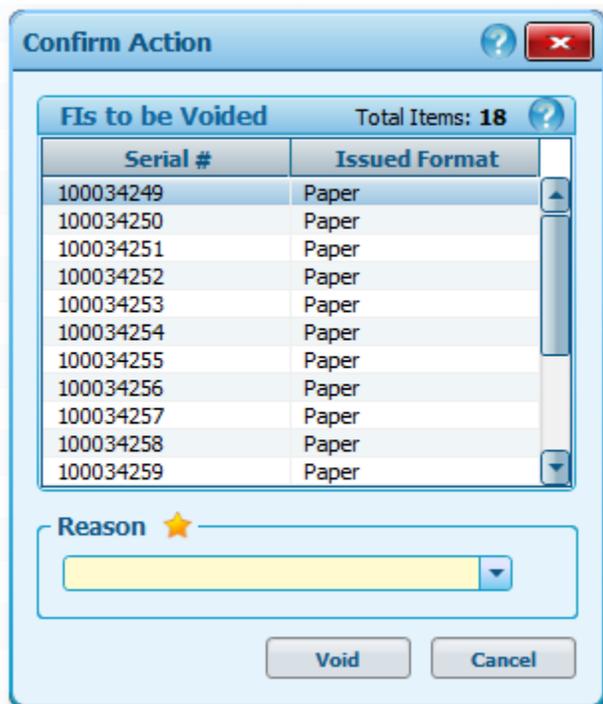
Guidance: Local users can scan Medical Documentation to Scanned Documents from another screen such as Income or Eco Social **instead of OR in addition to** scanning on the Medical Documentation screen.

Issue Food Instruments (FIs) and Manual Food Instruments (MFIs)

There are two 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:

- **Food Package Resource Guide**
- **Formula Wizard**

The **Confirm Action** container for voiding Food Instruments on the **Food Instrument List** screen has changed to include an **Issued Format** column, see the screenshot below. This column auto-populates with the originally issued format (Paper or EBT) of the FIs to be voided. This feature is in place even though Crossroads is not issuing through Electronic Benefit Transfer at this time.



Frequently Asked Questions:

Question 1: Why do local users get a “**Concurrent Operation Detected**” message, and what should they do afterwards?

Guidance: This message is only displayed by Crossroads if two users hit a button for a family at the same time or if a single user hits a button multiple times. The correct actions to take are:

- Click “ok” within error message box to move forward.
- If the local user is issuing FIs, check for blue dots and/or go to “FI List” to verify that the client/family has not been issued to already. Examine the family’s FIs carefully to ensure that overissuance/duplicate issuance has not occurred.
- If needed, use “Delayed Signatures for FI Issuance” to have participant sign for their FIs.

Issue Food Instruments (FIs) and Manual Food Instruments (MFIs)

Known Issues:

New! MFIs unable to be matched

Details: Local users report not being able to match MFIs until the next day or not at all.
Workaround: Current month MFIs may not be able to be matched if the food prescription date is not before or matching the issuance day and certification date in Crossroads. MFIs that cannot be matched should be documented in the Care Plan. They may be reported as a valid issuance on the Unmatched Redemption report.
Expected resolution: This issue is under investigation.

Evaporated Milk displays as gallons on FI

Details: Evaporated Milk displays as gallons on participant Food Instruments instead of as 12-ounce cans.
Workaround: None. Crossroads is working as expected. One unit of measure is allowed per food category, and for milk the standard unit of measure is gallons.
Expected resolution: Will continue to occur.

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 for a data fix.
Expected resolution: Will continue to occur periodically.

Signature Device error message

Details: FIs printed, parent/guardian signed and signature was viewable on the screen. However, user received the error message "signature device could not be identified." If local user navigates to Delayed Signatures, has parent/guardian sign again and save, all FIs will reprint with duplicate FI serial numbers.
Workaround: Void the second set of FIs.
Expected resolution: Will continue to occur periodically.

Exchange/Increase or Add Formula

Exchange/Increase Formula allows the return and replacement of formula for the current month on an ounce-by-ounce basis. In addition, **Exchange/Increase Formula** allows the user to **issue an increased amount of formula or WIC Eligible Nutritionals (WEN) or add formula/WEN for the current month**. This functionality can be used for fully breastfeeding women requesting formula for their dyad linked infant, partially breastfeeding women requesting additional formula for their dyad linked infant, and women and children with medical documentation to add WEN. This functionality is not available on the same day the original food prescription is created, but can be used the next day. **A new prescription must be entered that reflects the change (exchange/increase or add)**. Proration applies if the max quantity is prescribed.

There are several resources available to help the local user exchange or increase formula in Crossroads. These resources are available on the NSB website:

- **Exchange Type of Formula After Issuance Quick Reference Guide**
- **Exchange Type of Formula After Issuance**
- **Increase or Add Formula After Issuance**
- **Increase or Add Formula After Issuance Quick Reference Guide**
- **Using the Replace Function in Crossroads**

Known Issues:

New! Add formula feature not functioning as expected

Details: Using the Add Formula feature on the Add Formula using Exchange/Increase quick link is not working. A Validation Summary states to “Please select food subcategory.” This affects infants who were fully BF at issuance but are moving to category partially BF or fully formula feeding before their next issuance date. This also affects children or women who are receiving WEN for the first time in between issuance.
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Workaround: Issue a full or partial formula package for Similac Powder using MFIs. Other formulas or WEN can be ordered from NSB.
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Expected resolution: This issue is under investigation.
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New! Exchange/increase performance issues

Details: local users report screens freezing for up to one minute when using the Exchange/Increase screen.

Workaround: Wait for the application to unfreeze. Please report this issue to the CSD.

Expected resolution: This issue is under investigation.
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Exchange/Increase or Add Formula (continued)

Frequently Asked Questions:

Question 1: When attempting to increase or add formula I am getting an error message. Why?

Guidance: The container “Select the Formula Being Returned” must be completed even though no formula is being returned. If the screen is completed but this container is left blank, the user will receive a Validation Summary after clicking Save. The Validation Summary states, “Please select food subcategory to return. If you are not attempting to change formula and are only issuing an increased amount, select the same formula to return and replace.”

Question 2: How do I use the replace function to replace damaged FIs?

Guidance: Local agency staff may use the Replace function to reissue FIs or CVVs for the following allowable reasons:

- FIs or CVVs were damaged
- FIs or CVVs were destroyed in a major household misfortune
- FIs or CVVs were stolen
- Primary Caretaker changes

For more information about this policy, please refer to the WIC Program Manual (December 2016 revision), Chapter 8, Section 6. For information about how to use the Replace function, please see the Crossroads Resource **Using the Replace Function in Crossroads**. This resource is available on the nutritionnc.com website. To use the Replace function to change a food prescription, see the resource **Replacing Food Instruments after Issuance Quick Reference Guide**, which is also available on the nutritionnc.com website.

Question 3: If the participant exchanged 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 Exchange/Increase 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: Similac Advance Stage 1 powder reconstitutes to 90 ounces. $7 \text{ cans} \times 90 = 630 \text{ ounces}$
Nutramigen Enflora LGG reconstitutes to 87 ounces. $630 \div 87 = 7.24 \text{ cans}$ which rounds to 8 cans.

Subsequent Certification

Known Issues:

Discrepancy between actual and expected certification dates

Details: Local user reported that when she applied for a subsequent certification for a child in February 2016 that she received an error message stating that the child was not eligible for subsequent certification until February 2017. It appears that Crossroads allowed a previous user to click the Certify button twice and the participant ended up with two Certification Periods. This issue also exists for children certified for six months as an infant –there is an additional certification period of one year.

Workaround: Terminate the participant and apply for a Subsequent Certification.

Expected resolution: This issue was reported as fixed in 1.7.2, but reappeared in 1.8.2. This issue is being investigated.

Scheduling

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

- **Scheduling**
- **Master Calendar**
- **Scheduling Reports**

Frequently Asked Questions:

Question 1: What should local users do when other family members who have expired certifications show up in the quick appointments for subsequent certification?

Guidance: Other participants in the family, even though expired, may be eligible for WIC (usually a child based on their age). It is correct for the system to recognize this and suggest an appointment. Local users need to manually unselect the expired participant(s) and change the start and end dates for the appointment search if they do not wish to make the suggested appointment(s).

Question 2: 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 must **ADD** this appointment type when searching for appointments.

Scheduling

Frequently Asked Questions (continued):

Question 3: 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 must intentionally check to see whether participants have received the required nutrition education contacts. Crossroads does not track whether required nutrition education has been completed.

Question 4: 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.

Known Issues:

Search for available classes returns a blank or incomplete Master Calendar

Details: Local users report that searching for classes within a selected time frame does not result in a display of all the classes scheduled during that time frame.
Workaround: Search for the specific day of the desired class.
Expected resolution: Crossroads is working as expected. In this case, the template specified a language for each class. The NE Class Search has a "Preferred Language" option and will only pull back results of the language selected by the user.

Transfers

The Transfer Between Families screen was updated with the upgrade to version 1.8 and again with 1.12 to include issuance of benefits to cover any gap between benefit periods caused by a change in family issuance day. Please see the resource **Transferring: Gap in Benefits** for more information. This resource is available on the nutritionnc.com website.

NOTE: There is no “data fix” for an incorrect certification end date that was caused by local user error. Transferring out and back in is NOT recommended as a workaround to correct the error. This can cause a duplicate certification record and/or a duplicate infant, both of which cause problems with issuance and require a data fix.

Frequently Asked Questions:

Question 1: I have successfully completed a transfer, but the child’s icon is still in both families. What do I do next?

Guidance: After a transfer, the old and new records will contain a Family Composition Change Alert. The infant/child’s icon will remain in the original record until the batch process that night. If you click on or hover over the icon, the new record’s Family ID is displayed. Make a note of the new FID and then conduct a search by that ID. The transfer was successful, it just needs time to complete the process.

Known Issues:

New! Into state transfer certification end date error for infant greater than six months

<p>Details: Infant transferred into state with a VOC indicating that the infant was certified at nine months old. Infants certified after six months of age have a certification period of six months from cert start date. Local user entered a certification end date equal to 15 months old and received the following validation summary: Certification End Date Cannot be more than one-year future to the DOB end of month.</p>
<p>Workaround: Enter a certification end date of one day before the first birthday. Subsequently certify the infant at 12 months of age.</p>
<p>Expected resolution: This issue is under investigation.</p>

Breastfeeding Care Plan and Supplies

There are four 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**
- **Breast Pump Return**

Frequently Asked Questions:

Question 1: What can I do if the Capture Signature button is disabled (greyed out) when I attempt to return a pump?

Guidance: NSB encourages local users to maintain a paper inventory for any product that is not responding as expected. However, most users with this issue report back that they can return the pump later (usually the next day). If the participant is not present to sign, the local user may sign and note “button disabled” on the signature pad. If you or another coworker are unable to return the pump to local inventory after three days (one attempt on each day), report the issue to the Customer Service Desk. Our computer vendor has been unable to replicate this issue but is continuing to investigate. See also **Breast Pump cannot be returned** below for a similar but separate issue.

Question 2: When navigating through the Breast Pump Follow Up screen and entering in information to save, the save button is inactive and local user cannot complete follow up.

Guidance: The 72-hour follow-up data can only be entered and saved if a **multi-user breast pump** has been issued. Document follow-up for single user electric pumps and supplemental feeding devices in the participant’s Care Plan.

Known Issues:

Breast Pump cannot be returned: changed BF status

Details: Local users report that a pump cannot be returned if the participant category has changed from BF to NBF or has expired certification.
Workaround: Maintain a paper inventory for any product that is not responding as expected.
Expected resolution: This issue is under investigation.

Inventory

The Crossroads Resource **Inventory** (available on the NSB website) outlines the process for adding serialized and non-serialized inventory. Local agencies should maintain a paper inventory for any product that is not responding as expected and report the issue/product to the NSB Customer Service Desk.

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. There are three resources available to help the local user print and use reports in Crossroads. These resources are available on the NSB website.

- **LA User Access to Crossroad Reports**
- **Scheduling Reports**
- **Crossroads Reports Training Webinar Handout**

Notifications

There are two resources available to help the local user print notifications for WIC participants and applicants in Crossroads. These resources are available on the NSB website:

- **Printing Missed Appointment Notifications**
- **No Longer Eligible Notification**

Known Issues:

New! Incorrect certification end date on notification

Details: Local users report that some notifications have an incorrect certification end date. This is rare.
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Expected resolution: This issue is under investigation.
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