

Transferring: Gap in Benefits

Crossroads can now determine if a gap in benefits will result from transferring an infant or child between families. A hard stop message will occur when **ALL** of the following conditions are met:

- The Family Issuance Day (FID) of the Current (sending) Family is earlier in the calendar month than the FID of the Receiving Family **AND**
- The **date of transfer** is earlier in the calendar month than the FID of the Receiving Family **AND**
- The Current Family does not have issued benefits for the current month **AND**
- The Receiving Family has issued benefits for the current month.

Example: In State Transfer (Individual to Family)

Current Family (Iceland) FID=5

Receiving Family (Basketball) FID=18

Date of Transfer= 1

Current Family: does not have issued benefits for the current month

Receiving Family: has issued benefits for the current month

Category	Participant	Certification End Date	Aug	Sep	Oct
Child	Joseph Iceland	8/30/2017	1/3	Full	Full

Category	Participant	Certification End Date	Aug	Sep	Oct
Breastfeeding	Betty Basketball	6/1/2017	Issued	Issued	Issued
Infant	Nathan Basketball	6/1/2017	Issued	Issued	Issued
Infant	Nancy Basketball	6/1/2017	Issued	Issued	Issued

After clicking the **Transfer** button on the **Transfer Between Families** screen, a pop-up message (below) is shown. The user must click **OK** to clear the message. Crossroads will not allow the transfer to occur until the individual being transferred is issued current month benefits in the current family.

Family Members Not Fully Issued

Transfer cannot be completed!

The individual(s) selected for transfer do not have current benefits issued.
Prior to the transfer, benefits must be issued in the current family for the current month.
Contact the appropriate staff to issue current benefits in the current family and then complete the transfer.

OK

Transferring: Gap in Benefits

Before the transfer can take place, complete the following steps to issue to the transferring individual for the current month:

Transferring within the **same clinic**:

- If the current (sending) family has multiple family members on WIC, **de-aggregate** the benefits and change the **Issuance Frequency** to 1 Month. **Issue 1 month** to the individual being transferred. Do **not** issue future months in the current family. Do **not** issue to the additional family members who are not being transferred. **Note:** If the individual being transferred is a foster child, de-aggregation is not necessary.
- Give the printed FIs for the current month to the Receiving family.
- Complete the transfer (see instructions on page 3)

Transferring to a **different agency**:

- Contact the clinic of the sending family and have them issue current month FIs for the individual being transferred. Give them the following instructions:
 - If the current (sending) family has multiple family members on WIC, **de-aggregate** the benefits and change the **Issuance Frequency** to 1 Month. **Issue 1 month** to the individual being transferred. Do **not** issue future months in the current family. Do **not** issue to the additional family members who are not being transferred. **Note:** If the individual being transferred is a foster child, de-aggregation is not necessary.
 - Void those printed FIs **after the transfer has taken place**.
- After the sending clinic has completed issuance for the current month, complete the transfer (see instructions on page 3). Then issue MFIs for the current month with FDTs equal to the date of transfer and LDTS equal to the last day of the sending family's issuance month. Prorate MFIs if necessary. Document the MFI issuance and reason in the participant's Care Plan.

The screenshot displays the 'Issue Food Instruments' configuration screen for the 'Iceland Family'. The 'Issuance Frequency' is set to '1 Month(s)'. The 'Family Issuance Members' table shows two members: 'Pregnant' (Ida Iceland) and 'Child' (Joseph Iceland). The 'FDTs: 9/1/2016 - LDTS: 9/4/2016' is highlighted. The 'Issue' button is also highlighted.

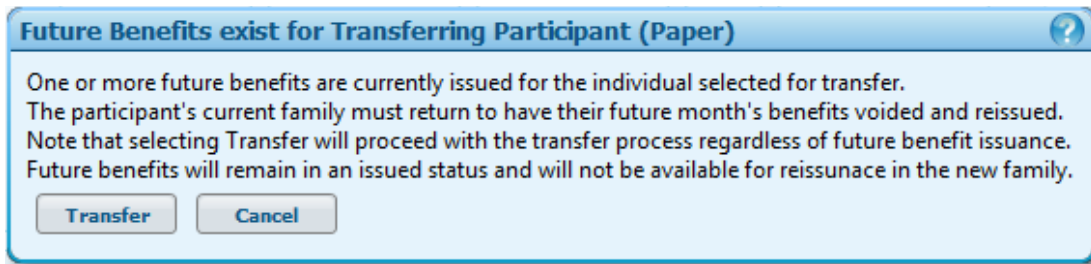
Category	Participant	Certification End Date	Aug	Sep	Oct	
<input type="checkbox"/> Pregnant	Ida Iceland	5/13/2017	Not Selected	Not Selected	Not Selected	Change Rx
<input checked="" type="checkbox"/> Child	Joseph Iceland	8/30/2017	1/3	Not Selected	Not Selected	Change Rx

Subcategory	Quantity	UOM
Milk Low Fat/fat free	2	Gallons
Fruit & Vegetables Cash Value	\$8.00	\$\$\$
Eggs	1	Dozen
Juice 64	1	Containers
Bread/Whole Grains	32	Ounces
Cereal (Adult)	18	Ounces
Legumes	1	Containers

In the above example, current month benefits will be issued to the individual being transferred with FDTs 9/1/16 (date of transfer) and LDTS 9/4/16 (last day of the sending family's issuance month).

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Do not issue future months in the current (sending) family. If the issuance frequency is not changed and the individual is issued future months in the current family, then the following message will appear during the transfer: 'Future Benefits exist for Transferring Participant.'



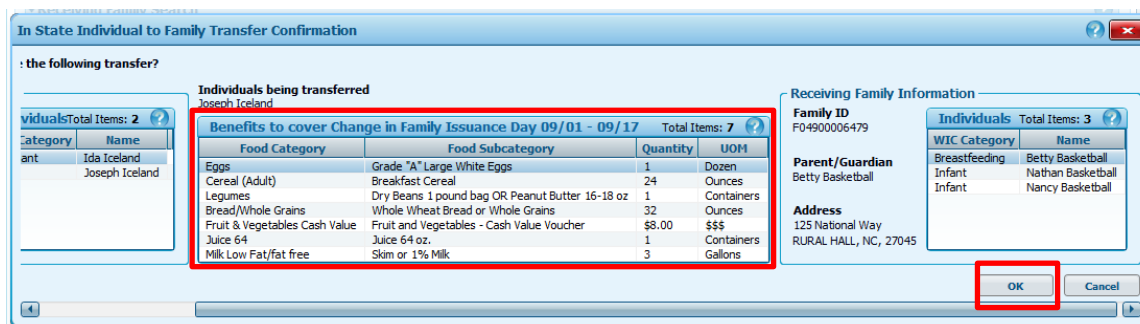
If the **Cancel** button is selected, the user is returned to the **Transfer Between Families** screen. The user can then void the future months' benefits from the Sending Family using the FI List or the FI Investigation Tool. After future months' benefits are voided, return to the **Transfer Between Families** screen and select **Transfer**.

If the **Transfer** button is selected, the user proceeds to the **In State Individual to Family Transfer Confirmation** screen. This popup serves as a notification and warning and does **not** perform any activity on future issuances. It does **not** affect the functionality of issuing benefits to cover a gap period, but is only an information message to the user to alert them that future benefits have been issued in the sending family.

Completing the transfer: In State Individual to Family Transfer Confirmation

In some scenarios, Crossroads will determine that an **additional gap in benefits** will result from transferring a participant between families. Additional food benefits will be displayed in the **In State Individual to Family Transfer Confirmation** as shown below. Crossroads calculates the number of days in the gap period and prorates the food benefits. The proration is based on the time period between the FID of the Sending Family and the FID of the Receiving Family. The benefits will have a FDTS equal to the date of the transfer and a LDTS equal to the last day of the issuance period for the Receiving Family.

Note: If an additional gap in benefits is **not** found, only the Current and Receiving Family Information containers will be shown in the confirmation container.



Example (Iceland→Basketball families):

Current Family FID=5

Receiving Family FID=18

$18 - 5 = 13$ days of food benefits

Note that the benefits have a FDTS equal to the date of the transfer (9/1) and a LDTS equal to the last day of the issuance period for the Receiving Family (9/17) but only 13 days of food are issued because of the benefits issued **before** the transfer (to cover 9/1 – 9/4).

Transferring: Gap in Benefits

Completing the transfer: In State Individual to Family Transfer Confirmation (continued)

Click the **OK** button to complete the transfer and issuance of benefits to cover change in Family Issuance Day. When additional benefits are issued as part of the transfer, the system will prompt for a signature. Have the receiving family sign for these FIs. **Do not** void these printed FIs. Give them to the receiving family.

After the signature has been obtained and the Save button has been clicked, the transfer will take place and a Successful status message received.

At this point, the transferred individual has the following issued FIs:

- FDTS 9/1/16 – LDTS 9/4/16 (current month with sending family)
- FDTS 9/1/16 – LDTS 9/17/16 (benefits to cover gap in issuance)

FI dates may overlap. This is acceptable. **Do not** void any of these printed FIs.

After the transfer has taken place, open the record of the receiving family and go to the **Issue Food Instruments** screen. Verify if any **future month** FIs need to be printed for the transferred individual.

Basketball Family
 Family ID: F04900006479
 122 National Way
 RURAL HALL, NC 27045

Betty Basketball
 Participant ID: 99465534L
 Age: 26 years and 6 months
 WIC Category: Breastfeeding Woman

Configuration
 Family Issuance Day: 18
 Issuance Frequency: 3 Month(s)

Category	Participant	Certification End Date	Aug	Sep	Oct	
Breastfeeding	Betty Basketball	6/1/2017	Issued	Issued	Issued	Change Rx
Infant	Nathan Basketball	6/1/2017	Issued	Issued	Issued	Change Rx
Infant	Nancy Basketball	6/1/2017	Issued	Issued	Issued	Change Rx
Child	Joseph Iceland	8/30/2017	Issued	Full	Full	Change Rx

▼FDTS: 9/18/2016 - LDTS: 10/17/2016 Total Items: 7

Food Category	Subcategory	Quantity	UOM
Milk Low Fat/fat free	Skim or 1% Milk	4	Gallons
Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Voucher	\$8.00	\$\$\$
Eggs	Grade "A" Large White Eggs	1	Dozen
Juice 64	Juice 64 oz.	2	Containers
Bread/Whole Grains	Whole Wheat Bread or Whole Grains	32	Ounces
Cereal (Adult)	Breakfast Cereal	36	Ounces
Legumes	Dry Beans 1 pound bag OR Peanut Butter 16-18 oz	1	Containers

▼FDTS: 10/18/2016 - LDTS: 11/17/2016 Total Items: 7

Food Category	Subcategory	Quantity	UOM
Milk Low Fat/fat free	Skim or 1% Milk	4	Gallons
Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Voucher	\$8.00	\$\$\$
Eggs	Grade "A" Large White Eggs	1	Dozen
Juice 64	Juice 64 oz.	2	Containers
Bread/Whole Grains	Whole Wheat Bread or Whole Grains	32	Ounces
Cereal (Adult)	Breakfast Cereal	36	Ounces
Legumes	Dry Beans 1 pound bag OR Peanut Butter 16-18 oz	1	Containers

Buttons: Preview Checks, Formula Wizard, Next Certification Due Notice, Issue, Cancel

In the example above, future (September and October) food benefits are available to be issued to the transferred individual. The food benefits available to be issued for September have a FDTS 9/18/16 and a LDTS 10/17/16 to match the FID of the receiving family. Select **Issue** to issue September and October food benefits.

Note: The issuance of benefits to cover a gap in coverage caused by a transfer is only available as part of the transfer process. These benefits will not be shown as 'available' for issuance through the Issue Food Instruments screen.