

Transfer: Paper to eWIC

This resource provides step-by-step instructions on how to complete the following types of transfers in Crossroads:

- Transfer Family from a Paper-based Clinic to an eWIC Clinic
- Transfer Individual (Between Families) from a Paper-based Clinic to an eWIC Clinic
- Transfer Foster Child (Between Families) from a Paper-based Clinic to an eWIC Clinic

Transfer Family from a Paper-based Clinic to an eWIC Clinic

- 1) Locate family's record in Crossroads by completing a **State-Wide** Family Search. Click on pencil icon to open the record.

Family ID	Participant ID	Last Name	First Name	H.L.	Date of Birth	Category	Medical Number	Status	Certification End Date	Agency	Clinic	Parent/Guardian 1 Name
00200003932	96088636L	Tomato	Red		6/2/1994	P		Active/Certified	2/4/2018	002 - Alexander County	002-01 - Alexander - Taylorsville	Red Tomato

- 2) Click on Family Services > Transfer > Between Agency or Clinic and then click the **Transfer** button located on the bottom right of the Transfer screen

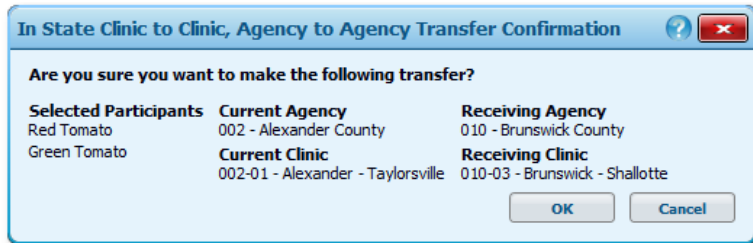
Tomato Family
Family ID: 00200003932
Address: 452 Garden Drive, STONY POINT, NC 28678

Parent/Guardian: Red Tomato

Current Agency: 002 - Alexander County
Current Clinic: 002-01 - Alexander - Taylorsville
Receiving Agency: 018 - Buncombe County
Receiving Clinic: 018-02 - Buncombe - Shiloh

Transfer: Paper to eWIC

- 3) Local user will receive a Confirmation Message. If the information is correct, click OK.



- 4) If the family has transferred from a Paper-based Clinic to an eWIC Clinic and does not have any currently issued paper food instruments and is eligible for issuance, complete the following steps:
- Go to the Family Demographics screen and update the family's address and zip code. A correct address is important and will be used for mailing replacement eWIC cards, if needed. The zip code will be used in selecting a Personal Identification Number (PIN) for the eWIC Card.
 - Issue an eWIC Card: Refer to the resource "Issuing an eWIC Card" for more guidance.
 - Have CPA verify that the family's current Food Prescriptions are accurate.
 - Issue Food Benefits: Refer to the resource "Issuing eWIC Food Benefits" for more guidance.
- 5) If the family has transferred from a Paper-based Clinic to an eWIC Clinic and has paper food instruments for the current or future months, the family can do one of the following:
- Redeem paper food instruments for the current and future months until the Last Date to Spend (LDTs).
 - Redeem paper food instruments for the current month and bring in ALL future paper Food Instruments (FIs) to have them voided and reissued as eWIC food benefits.
- Note:** Current month paper food instruments **cannot** be voided and replaced with eWIC food benefits if **ANY** of the food instruments for the current month have been redeemed.

Voiding future month paper food instruments:

- Go to **Issue Benefits > Food Instrument List** and place a check mark next to each FI number for the future months and then click the "Void Selected" button.
- A **Confirm Action** popup will display. The Issued Format of the FIs to be Voided will be displayed as **Paper**. Choose a **Reason for the Void** in the drop-down box and click the **Void** button.
- Review issuance dots for future months to verify that they have changed from blue to green indicating issuance availability.
- Reissue future months: Refer to the resource "Issuing eWIC Food Benefits" for more guidance.

Transfer: Paper to eWIC

Transfer Individual (Between Families) from a Paper-based Clinic to an eWIC Clinic

- 1) Locate participant's record in Crossroads by completing a **State-Wide** Family Search. Click on pencil icon to open the record.

Family ID	Participant ID	Last Name	First Name	PL	Date of Birth	Category	Medical Number	Status	Certification End Date	Agency	Clinic	Parent/Guardian 1 Name
000009333	M000894R	Potato	Idaho	6/2/2015	c	Active/Certified	96720038		9/1/2018	001 - Alexander County	002-01 - Alexander - Taylorville	Sweet Potato

- 2) Click on Family Services > Transfer > Between Families.

Transfer > Between Families

In State Transfer (Individual to Family)

- 3) Select the Individual being transferred in the **In State Transfer (Individual to Family)** container. Next enter the name of the Receiving Family and click the **Search** button.

Transfer Between Families

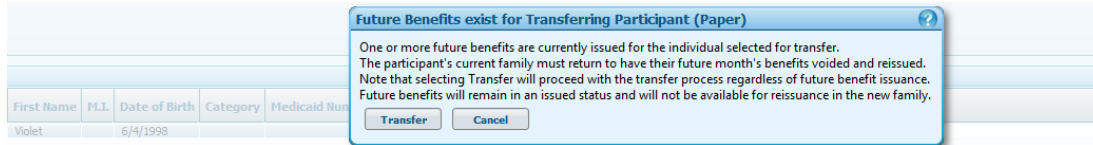
In State Transfer (Individual to Family)

Receiving Family Search

Family ID	Participant ID	Last Name	First Name	PL	Telephone Number	Date of Birth	Participant ID	Medical Number	EBI Card Number
000000172		Frank	Idaho	6/1/1996					

Transfer: Paper to eWIC

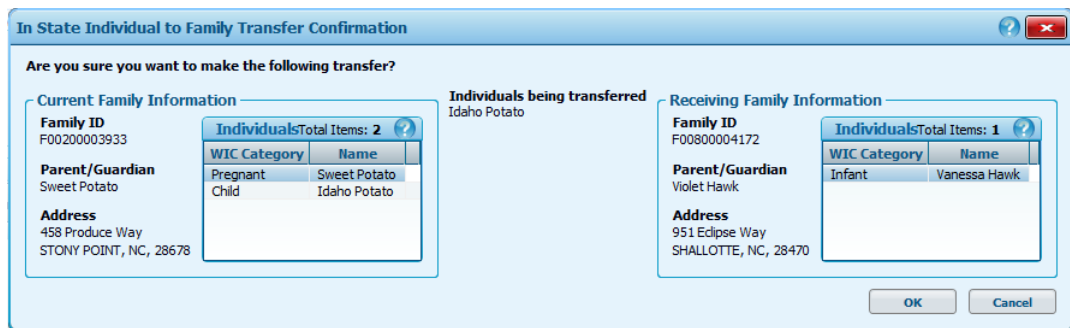
- 4) Click the **Transfer** button located on the bottom right of the Transfer screen. If future benefits exist for the Transferring Participant, a status message will appear. The participant's current family must have their future month's benefits voided. If this does not occur, future benefits will remain in an issued status and will not be available for issuance in the new family.



Click **Cancel** if the future month's benefits are to be voided. Contact the sending clinic and request this action be completed. Click **Transfer** if the step to void future month's benefits is skipped. Future benefits will not be available for reissuance in the new family.

In this scenario, **Cancel** was selected and the participant's current family had their future month's benefits voided in the sending clinic. After this action took place, staff returned to the **Transfer Between Families** screen, completed the necessary information and clicked the **Transfer** button.

Local user will receive a **Confirmation Message**. If there is a gap in benefits due to the change in Family Issuance Day (FID), "Benefits to Cover Change in FID" will be listed in this confirmation. If the information is correct, click OK. Food benefits due to a gap will be automatically sent to the receiving family's Electronic Benefits Account.



- 5) A status message will display stating the individual has been successfully transferred.
- 6) Click **Cancel** to leave the sending family's record and then open the record of the receiving family. A **Family Alert** will appear with the message "Family Composition Change"
- 7) If the individual has transferred from a Paper-based Clinic to an eWIC Clinic and is eligible for issuance, complete the following steps:
 - a. Have CPA verify that the transferred participant's current Food Prescription is accurate.
 - b. Issue Food Benefits: Refer to "Issuing eWIC Food Benefits" for more guidance.

Note: The transferred individual will be added to the receiving family's Electronic Benefits Account and eWIC food benefits will be redeemed using the family's eWIC Card.

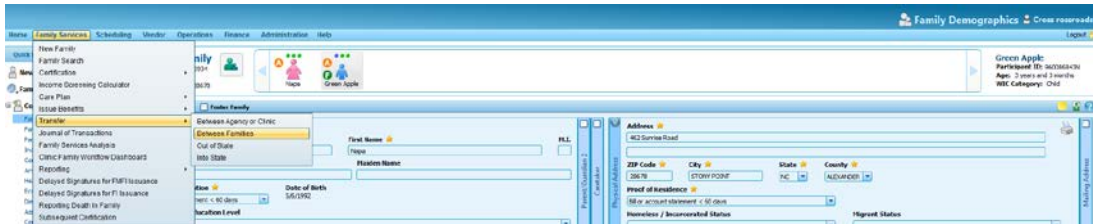
Transfer: Paper to eWIC

Transfer Individual (Between Families) from a Paper-based Clinic to an eWIC Clinic: Foster Child

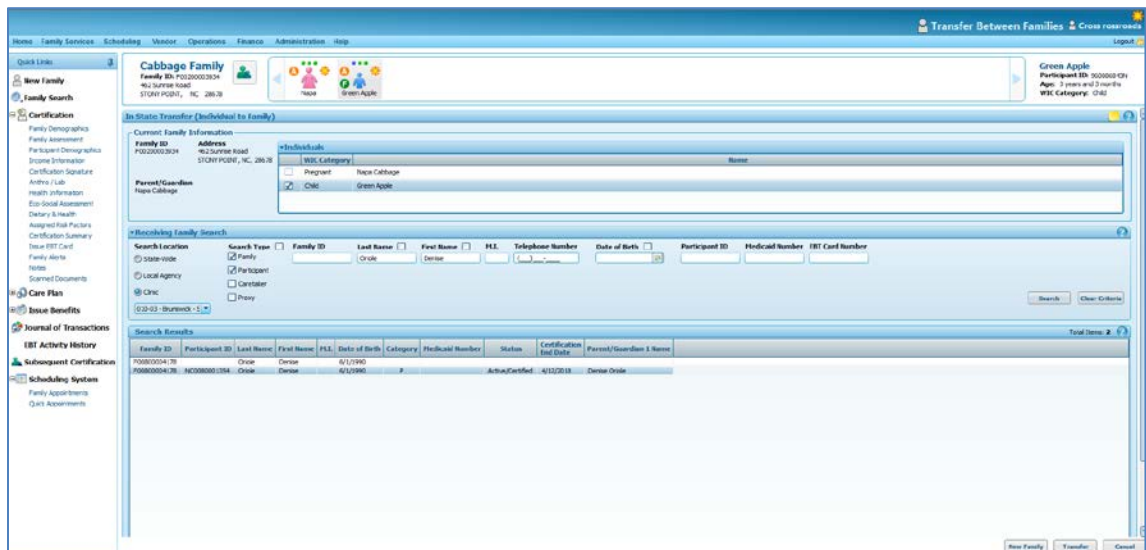
- 1) Locate participant's record in Crossroads by completing a **State-Wide** Family Search. Click on pencil icon to open the record. If the child is not already designated as a Foster Child, navigate to the **Participant Demographics** screen and complete the Foster Child information.



- 2) Click on Family Services > Transfer > Between Families.



- 3) Select the Individual being transferred using the **In State Transfer (Individual to Family)** container. Next enter the name of the Receiving Family and click the **Search** button.



Transfer: Paper to eWIC

- 4) Click the **Transfer** button located on the bottom right of the Transfer screen. Local user will receive a **Confirmation Message**. If there is a gap in benefits due to the change in Family Issuance Day (FID), “Benefits to Cover Change in FID” will be listed in this confirmation. If the information is correct, click OK. Food benefits due to a gap will be automatically sent to the foster child’s Electronic Benefits Account in the new family.
- 5) A status message will display stating the individual has been successfully transferred.
- 6) Click **Cancel** to leave the sending family’s record and then open the record of the receiving family. A **Family Alert** will appear with the message “Family Composition Change”
- 7) If the individual has transferred from a Paper-based Clinic to an eWIC Clinic and is eligible for issuance, complete the following steps:
 - a. Issue an eWIC Card for the foster child. The foster child will have a separate Electronic Benefits Account and eWIC Card and the food benefits will NOT be aggregated with the receiving family’s food benefits.
 - b. Have CPA verify that the transferred participant’s current Food Prescription is accurate.
 - c. Issue Food Benefits: Refer to “Issuing eWIC Food Benefits” for more guidance.

In this example:

- Sending Family Issuance Day (FID)=17 and the Receiving FID=27
- **Issue Food Instruments** screen shows Issuance Availability for August and October. September has an Issued status referring to paper food benefits [FDTs 9/19/17 and LDTs 10/16/17] issued to the sending family prior to the transfer. These paper food benefits should be transferred from the sending family to the receiving family. If all paper FIs for the current month are in hand, they can be voided and replaced with EBT benefits. If this is not the case, the remaining paper FIs can be redeemed by the receiving family.
- Issue ALL benefits available to the participant on the **Issue Food Instruments** screen. This will cover any gaps in benefits due to change in FID.

The screenshot displays the 'Issue Food Instruments' interface. At the top, it identifies the 'Woodpecker Family' and the 'Green Apple' clinic. The main table shows a participant with a Family Issuance Day of 17 and a Certification End Date of 1/18/2018. A red box highlights the 'Issuance Frequency' column, which shows 'Issued' for the month of September. Below the table, there are two sections for food instruments, each with a list of categories and subcategories, including quantities and units.

Category	Participant	Issuance Frequency	Certification End Date	Aug	Sep	Oct
Child	Green Apple	17	1/18/2018	1/3	Issued	Full

Food Category	Subcategory	Quantity	Units
Milk - Fat Reduced	Skim/Non Fat or 1% Milk	2	Gallons
Fruit & Vegetable CUB	Fruit and vegetables	\$8.00	\$\$\$
Juice A4	Juice 64 oz Fluid	1	Containers
Bread/Whole Grains	W/W Bread or Whole Grains	32	Ounces
Eggs	Eggs Grade A Large White	1	Dozens
Breakfast Cereal	Breakfast Cereal	18	Ounces
Legumes	Bean/Pis. 4 Cans, 1 Dry, or Peanut Oil	1	Containers

Food Category	Subcategory	Quantity	Units
Milk - Fat Reduced	Skim/Non Fat or 1% Milk	4	Gallons
Fruit & Vegetable CUB	Fruit and vegetables	\$8.00	\$\$\$
Juice A4	Juice 64 oz Fluid	2	Containers
Bread/Whole Grains	W/W Bread or Whole Grains	32	Ounces
Eggs	Eggs Grade A Large White	1	Dozens
Breakfast Cereal	Breakfast Cereal	36	Ounces
Legumes	Bean/Pis. 4 Cans, 1 Dry, or Peanut Oil	1	Containers