Overview

The North Carolina Women, Infants, and Children (WIC) Crossroads system will release a new software version to local agency users on Monday, June 25, 2018.

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 1.17. 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 1.15 Guidance** document dated 9.11.17 which may be recycled or retained for references to historical FAQs.

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.

New Functionality

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. The question **Ever Breastfed?** will default to **Yes** for women who are subsequently certified as Breastfeeding. This question will be required for Breastfeeding women. The question **Ever Breastfed?** is still currently defaulting to **Unknown** for Non-breastfeeding women (who may have breastfed before being subsequently certified). The CPA or Breastfeeding Peer Counselor must select **Yes** for **Ever Breastfed?** in order for the **Age Infant Stopped Breastfeeding** and **Reason Infant Stopped Breastfeeding** fields to become required. Additional changes will be made in a future upgrade so that there is no default answer to **Ever Breastfed?** for ALL women and a response to the question will be required.

Foster Child Resource

The eWIC Pilot and Rollout has provided additional information about procedures and best practices related to transferring non-foster infants and children to foster families. The **Foster Child** resource has been revised accordingly. This resource was sent by email along with this Upgrade Guidance and will be available on the NSB website.

Please NOTE: because non-foster children are transferred to a new family before the foster box is checked in the receiving family, any previously issued current benefits and/or gap benefits are transferred to the receiving family's Electronic Benefits Account (EBA). Future benefits issued after the foster box is checked are issued to the foster child's EBA. This is described in detail in the **Foster Child** resource.

Fixed Defects

The upgrade to 1.17 contains several fixes which are described below. If you experience additional instances of any defects that are listed as fixed, please contact the Nutrition Services Branch (NSB) Customer Service Desk (CSD) at 919-707-5795.

1. **Assigned Goals History: previously selected goals missing**
   Local users should now see previously selected goals in the Assigned Goals History container.

2. **Exchange/Increase screen issues**
   a. **Prorated formula issuance**
      Crossroads will now issue the prorated amount (if applicable) instead of the full month's amount when adding formula or WIC Eligible Nutritionals (WEN). Please note that proration only occurs when **adding** formula. If formula is being **increased or exchanged**, proration does NOT apply.
   b. **Select the Formula Being Returned**
      This field is now active when using the Exchange/Increase screen to exchange (or increase) formula.
   c. **Exchange formula for twins** is now working correctly.
   d. PLEASE NOTE that when using the Exchange/Increase screen to exchange formula or WEN, the field **Quantity from EBT Account** MUST be filled out if there are any cans listed in the **Current Month EBT Benefit Balance** field. If this field is not filled out and there are cans listed in the **Current Month EBT Benefit Balance**, then two formulas (the old formula and the new formula) will be seen on the participant's Shopping List. Also, if both **Quantity** and **Quantity from EBT Account fields** are left blank, the full amount of formula prescribed will be issued instead of the RFO returned amount. If this occurs, contact the CSD to have the participant's EBA corrected.

3. **Referrals form template**
   The referrals form template has been adjusted so that the referral agency address and phone number will appear on the form instead of the participant's.

Currently Known Issues

Income

OLV Returns "Not enrolled" Message BUT NC Tracks Documents Child as Enrolled
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 CSD.

Anthro/Lab

Weight/length % does not match growth chart

This issue has been reported to the computer vendor for investigation. Please report additional instances to the CSD.

Lead value errors (Example: lead lab value is 4.88 but the system will not take decimals). Use rounding to enter lead levels on the Anthro/Lab screen: if <.5, round down; if >/= .5, round up, except for >4.5 but <5.0, in which case enter 4 or the risk code (211) will be triggered. Document the complete lead value including decimals in the Care Plan.

Growth Chart does not plot correctly
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.

Anthro/Lab screen has all the required information but the star remains even after the Health Information screen is completed and saved
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. If this does not solve the problem, call the CSD.

Multifetal gestations do not plot appropriately in 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.

Can't change the "Source of Measures" field
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."

Health Information

Issue with adding twins
On the Health Information screen for the woman (Breastfeeding or Non-Breastfeeding), the Number of Fetuses this Pregnancy defaults to 1 even though twins were added. When the user changes the number to 2, the Birth Outcome either lists each twin's name twice or only one of the twin's names is listed twice. Call the CSD for assistance with this issue.

Incomplete star on health information screen
Please NOTE: using the preferred work flow of certifying Mother first THEN Infant seems to avoid this issue. If the Health Information screen remains starred during an initial or subsequent certification and the certification cannot be completed, call the CSD **the same day the issue occurs** and request their assistance in completing the certification.

Assigned Risk

Missing Risk Code
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.

Inappropriate Risk Code
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).

Certification Summary

Can't complete a temporary certification (Risk Code 503)
The CPA must take the following steps:
• Complete starred fields on the Family Assessment, Anthro/Lab and Health Info 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
NOTE: If a woman with a temporary certification risk code returns to clinic with an infant before completing her pregnant certification, terminate the certification and apply for a Subsequent Certification. For 503s, this can be done on the same day.

Can't use the Extend Certification button
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.

Scanning

Can't save documents scanned on the Anthro/Lab or Dietary & Health screens without also changing data on the screen
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.

Referrals

Can't find the QuitlineNC referral for my county
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

Can't find the SNAP referral for my county
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.

Prescribe Food

Can't dismiss the message about medical documentation that has expired/is about to expire
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: These steps also apply to participants who have attended a nutrition education class.

Dyad food prescriptions mismatch
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**.

Issue Food Instruments (FIs)

Evaporated Milk displays as gallons on Shopping List
Crossroads is working as expected. One unit of measure is allowed per food category, and for milk the standard unit of measure is gallons. Participants prescribed evaporated milk can purchase five (5) 12 oz. cans of evaporated milk per gallon listed on their Shopping List.

Overlap in benefits error after adding an infant
The following issue has been reported twice to the NSB Customer Service Desk:
Family was issued benefits on (example) April 30, 2018. Infant was added on (example) 5/22/18. When the local user attempted to issue formula to the infant, she received an overlap in benefits error message. The Family Issuance Day had NOT been changed. Future months were issued to the infant. Current month was issued out of inventory.
This has been reported to our computer vendor for investigation and a data fix requested so that the infant can be counted in participation for the current month. The defect is scheduled to be fixed during the 1.19 upgrade.

Formula Wizard "doesn't work"
The Formula Wizard automatically displays for the current month **on or after** the Family Issuance Day (FID) when issuing food benefits for a participant with a food package containing a contract infant formula, an exempt infant formula or WIC Eligible Nutritionals (WEN) currently in inventory. Note: Federal Regulations restrict issuance of physical cans of formula **prior to FID**.

After selecting the number of cans to issue from Local Inventory and clicking the **Next** button, the Formula Wizard seems to "disappear" and a benefit preview pops up when issuing formula or WEN. After the local user selects **Issue**, a Food Benefits Issuance Signature Confirmation will appear listing the FI numbers to be issued to the EBA (if applicable) AND the Type and Quantity of Formula to be issued from Local Inventory. Once the signature is saved, an FI with the status **Redeemed** will appear in the FI List**.** This FI will contain the number of cans issued through Formula Wizard. This is how Crossroads counts participation for the participant and is expected Crossroads behavior. The local user can verify that the benefits have not been sent to the EBA by previewing/printing the Shopping List. Sometimes formula is issued through Formula Wizard AND to the EBA for the current month if there isn't enough formula in Inventory or by participant choice. In these cases, the Shopping List would contain some cans of formula. Please see the **Formula Wizard** resource at the NSB website for more information.

Formula Wizard / Inventory discrepancy
Example: Infant has a prescription for 9 cans Neocate. There are 12 cans of Neocate in Inventory. The local user selected **Issue FIs** and expected the Formula Wizard to pop up. It did not, so she selected the Formula Wizard button and received a message that there wasn't enough formula in inventory. This issue has been reported to our computer vendor and is under investigation. Instead of issuing through the Formula Wizard, issue formula to the participant's EBA or deaggregate the participant and issue directly out of inventory. Please see the **Formula Wizard** resource at the NSB website for more information.

Replace Current Benefits

Can't replace one subcategory with another (EX: milk for soy beverage)
Void and replace the future food benefits. Explain to the participant that the current benefits cannot be modified but that future benefits will contain the replacement. This issue is still under investigation so please continue to report this issue to the CSD.

Need to replace damaged (paper) FIs with eWIC benefits
Contact the CSD and they will help you.

Exchange/Increase or Add Formula

Formula exchange does not remove old formula from Shopping List
When using the Exchange/Increase screen to exchange formula or WEN, the field **Quantity from EBT Account** must be filled out if there are any cans listed in the **Current Month EBT Benefit Balance** field. If this field is not filled out and there are cans listed in the **Current Month EBT Benefit Balance**, then two formulas (the old formula and the new formula) are seen on the participant's Shopping List. Also, if both Quantity and Quantity from EBT Account fields are left blank, the full amount of formula prescribed will be issued instead of the RFO returned amount. If this occurs, call the CSD to have the old formula removed from the EBA.

Formula being returned not available on Exchange/Increase screen
When using the Exchange/Increase screen, the local user was able to select the new formula from the **Select the Replacement Formula** dropdown. However, the local user was unable to select the old formula from the **Select the Formula Being Returned** dropdown. Please contact the CSD for assistance.

Error message when attempting to increase
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."

Number of cans exchanged does not equal number of cans replaced
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 (always round UP, as shown in the example below). 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 cans x 90 = 630 ounces Nutramigen Enflora LGG reconstitutes to 87 ounces. 630 ÷ 87 = 7.24 cans which rounds to 8 cans.

Journal of Transactions

Exception error received when searching the JOT
Several but not all agencies have reported received an exception error or Sorry screen after selecting the Search button in the JOT. This has been reported to our computer vendor and is under investigation.

Scheduling

Expired family members show up in the quick appointments for subsequent certification
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).

Quick Appointments does not show Mid-Certification Assessment appointments
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.

Transfers

Transfer failure (in general)
Attempt to transfer an infant or child from one family to another results in one of the following:
- a status message of "Benefits Transfer Failed"
- an exception error or Sorry screen
- a status message of "Transfer Failed"

Do NOT transfer back and forth between the families to try to solve the issue as this may create multiple receiving families. Contact the CSD for assistance.

Transfer failure (foster)
Attempt to transfer more than one infant or child, at least one of whom is marked as a foster child, results in a validation summary error. The status message states: "Foster child cannot be combined with another foster child or non-foster child." This is because each foster child has a separate EBA from their foster family. Transfer each child **separately** by checking only one box each time on the Transfer Between Families screen.

Foster child with no benefits yet status is Issued
After a foster child is transferred, no future benefits appear on the shopping list, yet the benefit status for future months is **Issued**. This issue is rare but has been reported by local users. This issue is being investigated by our computer vendor. Please call the CSD for assistance with resolving this issue.

Incorrect certification end date after Into State Transfer
DO NOT transfer out of state and back into state to try 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. **Terminate** the participant, navigate to the **Into State Transfer** screen and re-enter the VOC information.

Into state transfer certification end date error for infant greater than six months
Infants certified after six months of age have a certification period of six months from cert start date. However, Crossroads is not accepting these types of certifications, and is showing a validation summary: Certification End Date Cannot be more than one-year future to the DOB end of month. Enter a certification end date of one day before the first birthday. Subsequently certify the infant at 12 months of age. This issue is scheduled to be fixed with the 1.19 upgrade.

Breastfeeding Care Plan and Supplies

Selecting Cancel on Breast Pump Return screen leads to exception error
Selecting another Quick Link does not move the user away from the exception error, the user has to shut Crossroads down completely and log back in. This has been reported to our computer vendor and is under investigation. This issue is scheduled to be fixed with the 1.19 upgrade.

Capture Signature button is disabled (greyed out) when a pump return is attempted
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.

Breast Pump Follow Up screen save button is inactive
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.

Breast Pump cannot be returned: changed BF status or participant is Expired
Maintain a paper inventory for any product that is not responding as expected.

Notifications

Incorrect certification end date on notification
Local users report that some notifications have an incorrect certification end date. This is rare. This issue is under investigation.