

Scanning Documents in Crossroads

When a participant record is opened in Crossroads, the **Scan Document** button is available on the following screens:



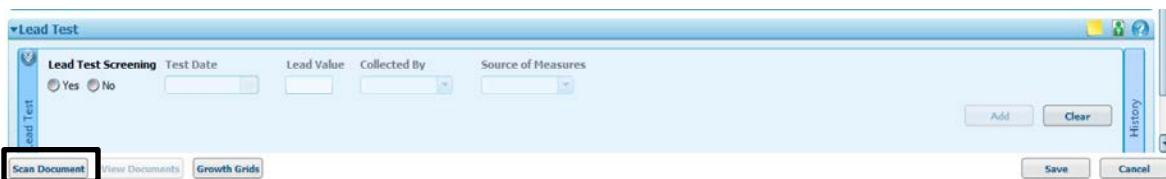
button is

- Income Information
- Anthro/Lab
- Health Information
- Eco-Social History
- Dietary & Health
- Assigned Risk Factors
- Prescribe Food: Medical Documentation

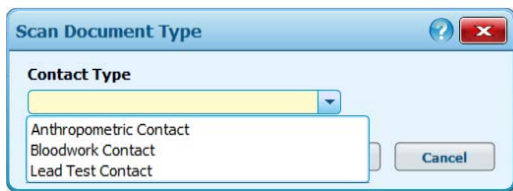
Crossroads has multi-page scanning capabilities. However, this functionality has some issues. North Carolina WIC agencies are instructed to scan and save documents **one page at a time**. Two-sided documents will need to be scanned and saved one page at a time.

Instructions for using the Scan Document function [Example: Anthro/Lab screen]

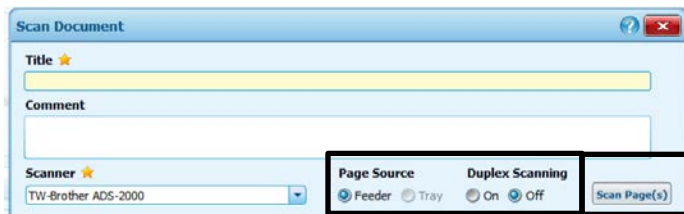
- 1) Verify that the scanner is turned on.
- 2) Click the Scan Document button located on the bottom left of the screen.



- 3) **Scan Document Type** popup appears on the Anthro/Lab screen: select **Contact Type** and click **OK**

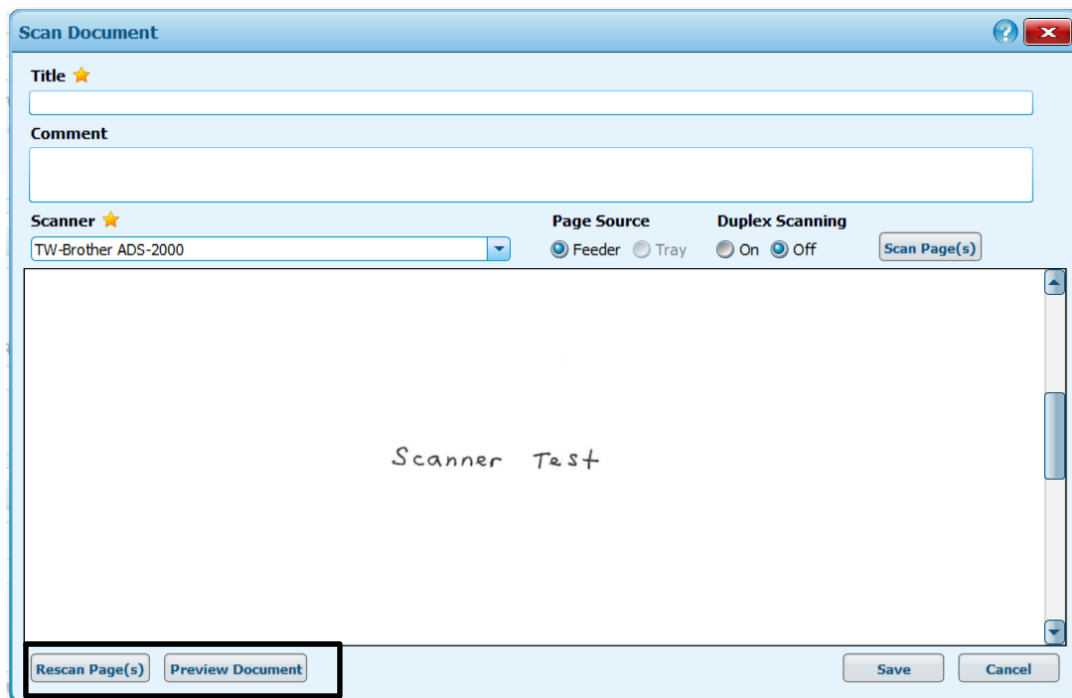


- 4) **Scan Document** popup appears. The user can title the document before or after the scan. The Page Source should be kept on **Feeder** and **Duplex Scanning** should be **OFF**.

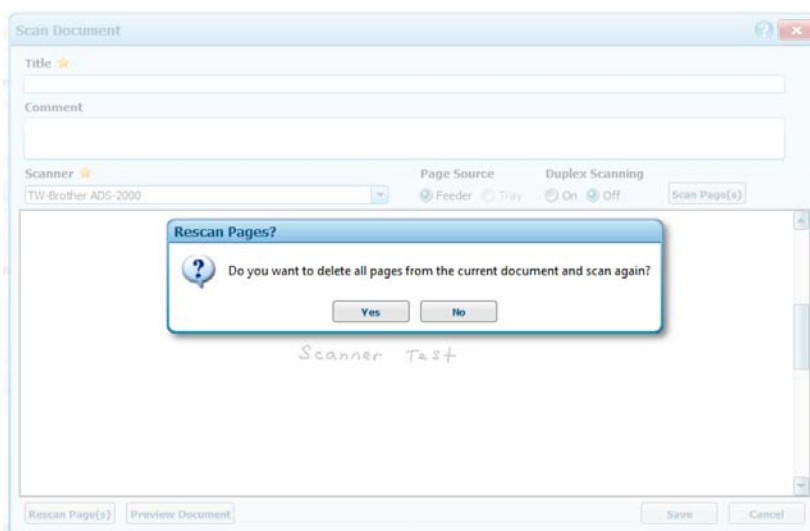


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- 5) Place the document (one page) in the scanner face down with the top of the page in the slot and click **Scan Page(s)**
- 6) After the document has been scanned, a popup screen opens showing you the scanned document and giving you options to Rescan Page(s), Preview Document, Save or Cancel.



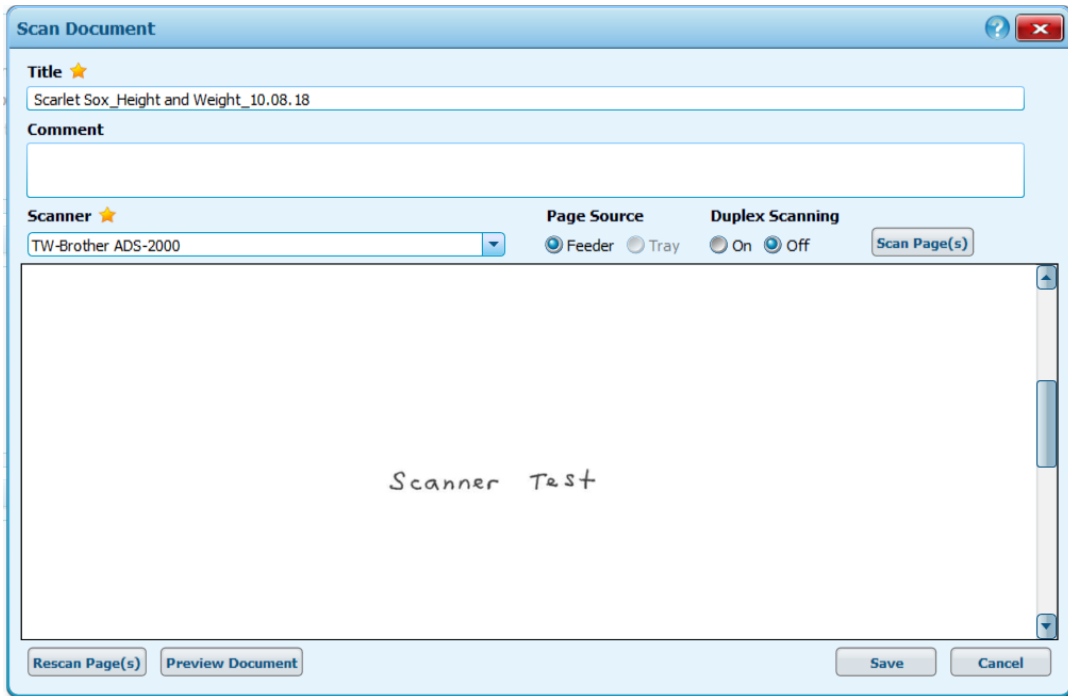
If you select Rescan Page(s), the following popup appears:



If you want to rescan the page, place the document in the scanner and Select Yes. Otherwise, Select No and you will be returned to the original scan.

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- 7) Title the scanned document if you have not already done so and click Save.



- 8) Scan additional pages using steps #2-7. You can use the same title as the original scan but add page numbers.
- 9) Complete the starred fields on the Anthro/Lab screen and click **Save**. This will save the data on the screen **AND** the scanned documents.

NOTE: Crossroads will NOT save scanned documents on the Anthro/Lab or Dietary & Health screens if data on the screen is not added or changed. This is a known feature of Crossroads. If scanning can't take place while working and saving initially on these screens, then the user can either change something on the screen or scan from another screen, such as Health Information or Eco-Social History.

- 10) After the document has been scanned and saved, the user can view it on the Anthro/Lab screen [in this example] by clicking on the **View Documents** button located on the lower left of the screen next to the **Scan Document** button.



or by selecting the **Scanned Documents** quick link under **Certification**

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To view the document under **Scanned Documents**, click on the magnifying glass located on the right-hand side under the title **View**.

The screenshot shows the Crossroads software interface. On the left is a 'Quick Links' sidebar with various menu items. The main header area displays 'Sox Family' with details: Family ID: F00600004453, 123 Main St, BOLIVIA, NC 28422. Below this is a navigation bar with icons for 'Fox', 'Scarlet', and 'Sam'. On the right, it shows 'Scarlet Sox' with Participant ID: NCO060001775, Age: 7 days, and WIC Category: Infant. The 'Scanned Documents' table has the following data:

Title	Scanned By	Document Type	Date	Total Items: 1
Scarlet Sox_Height and Weight_10.08.18	crossroads36	Height/Weight Document	10/8/2018	

The screenshot shows a document viewer window. The scanned document contains the text 'Scanner Test'. Below the document is a 'Document List' table with the following data:

Title	Date Time Scanned	Scanned By	Comment	Total Items: 1
Scarlet Sox_Height and Weight_10.08.18	10/8/2018 3:42:49 PM	crossroads36		

At the bottom right of the viewer is a 'Cancel' button.

IMPORTANT: If you are scanning on a screen that doesn't have starred fields, be sure to click **Save** before leaving that screen. Otherwise, the scanned document will not be saved. There is no prompt to save the screen.