The **Journal of Transactions** screen allows the user to view an individual or family's history of transactions within the Crossroads system.

#### Viewing the Journal of Transactions (JOT):

- 1) Conduct a Family Search on a previously certified participant and open the record
- 2) Under Quick Links, select Journal of Transactions
- 3) The Transaction Criteria defaults to All for Select Participant or Family and to All for Select Activity. The Start Date defaults to one month prior to the End Date and the End Date defaults to today's date.

Quick Links 7	Cereal Family Family ID: F00600004594 854 Gerber Way BOLIVIA, NC 28422	Rce Barley	Ric Par Ag	ce Cereal ticipant ID: 960138696N e: 27 years C Category: Non-Breastfeeding Woman			
Family Demographics Family Assessment	Transaction Criteria						
Income Information Certification Signature Anthro / Lab Health Information	Select Participant or Family Select Activi	ty Start Date 5/27/2022	End Date 6/27/2022 Search	]			
Eco-Social Assessment Dietary & Health	Transaction History			Total Items: 0 🕢			
Assigned Risk Factors Certification Summary	Occurrence Date Activity Descri	otion Participant Name	Staff Name Modified	Staff Name Created			
Certification Summary Issue EBT Card Family Alerts Notes Scanned Documents B and Care Plan B Issue Benefits Scannal of Transactions							

4) Choose from the **Select Participant or Family** drop-down and/or the **Select Activity** dropdown to customize the search. The **Start Date** and **End Date** can also be changed.

Cereal Family Family ID: F0060000459 854 Gerber Way BOLIVIA, NC 28422	94	Nce Barley	Ric Part Age WIC	e Cereal icipant ID: 960138696N : 27 years Category: Non-Breastfeeding Woman
▼Transaction Criteria				
Select Participant or Family	Select Activity	Start Date           ▼         5/27/2022	End Date 6/27/2022 Search	
Rice Cereal Barley Cereal	Latitita Dagarinting	Deutlineut Neuro	Choff Name Madified	Total Items: 0 🕢
_ Oat Cereal	Activity Description	Participant Name		Staff Name Created

Cereal Family Family ID: F00600004594 854 Gerber Way BOLIVIA, NC 28422	4 A	A Barley	Ric Part Age WIC	ticipant ID: 960138696N 27 years C Category: Non-Breastfeeding Woman
Transaction Criteria				$(\mathbf{r})$
Select Participant or Family	Select Activity	Start Date	End Date 6/27/2022 III Search	]
Transaction History       Occurrence Date	Certification Food Prescribed Nutrition Education Contacts Received Breast Pump Issuance Breast Pump Reserved Breast Pump Reserved Breast Pump Reservation Cancelled Goal(s) Breastfeeding Peer Counseling Contact Breastfeeding Supplies Referral Follow-up WIC Identification Issuance WIC EBT Card Issuance WIC Food Instrument Issuance Transfers Notifications Durchasee	Participant Name	Staff Name Modified	Total Items: 0 🕜

**NOTE**: Not every transaction that occurs in Crossroads will be listed under Select Activity. For example, **Add Formula** is not listed but is included in the **Increased Formula Issuance** Activity.

5) Click Search

Cereal F Family ID: F0 854 Gerber W BOLIVIA, NC	Conception Conceptica Conceptica Conceptica Conceptica Conceptica Conceptica	Rice	Ric Par Age Wit	ticipant ID: 960138696N 27 years C Category: Non-Breastfeeding Woman	
<ul> <li>Transaction C</li> </ul>	riteria			$\bigcirc$	
Select Participant	t or Family Select Activity	Start Date 5/27/2022	End Date	1	
Transaction H	istory			Total Items: 11 🕐	
Occurrence Date	Activity Description	Participant Name	Staff Name Modified	Staff Name Created	
5/27/2022	Food Prescribed	Barley Cereal	Cross rossroads	Cross rossroads	
6/1/2022	Food Prescribed	Barley Cereal	Cross rossroads	Cross rossroads	
6/7/2022	Food Prescribed	Barley Cereal	Cross rossroads	Cross rossroads	
5/27/2022	WIC Food Instrument Issuance	Barley Cereal	CSC System Setup	Cross rossroads	
6/1/2022	WIC Food Instrument Issuance	Barley Cereal	CSC System Setup	Cross rossroads	
6/27/2022	WIC Food Instrument Issuance	Rice Cereal	Cross rossroads	Cross rossroads	
6/27/2022	WIC Food Instrument Issuance	Barley Cereal	Cross rossroads	Cross rossroads	
6/1/2022	Purchases using EBT card	Rice Cereal	CSC System Setup	CSC System Setup	
6/1/2022	Purchases using EBT card	Barley Cereal	CSC System Setup	CSC System Setup	
5/27/2022	Exchange Formula	Barley Cereal	Cross rossroads	Cross rossroads	
6/1/2022	Exchange Formula	Barley Cereal	Cross rossroads	Cross rossroads	

If the search is **not** customized, then every family participant and activity for the past month will display when **Search** is selected.

The Transaction History includes the following information:

- Occurrence Date
- Activity Description
- Participant Name
- Staff Name Modified (transaction *modified* by user ID)
- Staff Name Created (transaction *created* by user ID)

<u>Note</u>: If the Staff Name Modified or Staff Name Created is **CSC System Setup** or **CSC Support Read Only**, then the local agency was NOT involved in the transaction.

**For example**: Food benefits issued through State Assisted Issuance (SAI) will display as Activity Description: WIC Food Instrument Issuance, Staff Name Modified: CSC System Setup, and Staff Name Created: CSC Support Read Only.

Transaction History Total Items: 16 🕐					
Occurrence Date Activity Description Participant Name Staff Name Modified Staff Name Created					
4/2/2022	WIC Food Instrument Issuance		CSC System Setup	CSC Support Read Only	

### Customizing a Search in the JOT:

### Example:

- 1) Select participant: Non-Breastfeeding Woman (Rice Cereal)
- 2) Select Activity: Certification
- 3) Change Start Date to 1/1/2018

### **Results**:

This customized JOT indicates that Rice Cereal has been certified three times since 1/1/2018.

To review **detailed information** about each transaction:

- Click on a specific row within the **Transaction History** grid and the row will become highlighted in blue.
- Next, click on the arrow located to the left of "**Certification**" **Transaction Detail.** The Transaction Detail will be named according to the Selected Activity.

Cereal F Family ID: F0 854 Gerber Wa BOLIVIA, NC	Concords 294 28422	Rice Barley	Par Ag WI	ce Cereal ticipant ID: 960138696N e: 27 years C Category: Non-Breastfeeding Woman
■ Transaction C	riteria			$\bigcirc$
Select Participant	t or Family Select Activity Certification	Start Date           I/1/2018	End Date 6/27/2022 Search	]
Transaction H	istory			Total Items: 3 🕢
Occurrence Date	Activity Description	Participant Name	Staff Name Modified	Staff Name Created
7/3/2020	Certification	Rice Cereal	Cross rossroads	Cross rossroads
5/26/2022	Certification	Rice Cereal	Cross rossroads	Cross rossroads
Certification Tran	saction Detail			

The following detailed information will display for Activity: Certification

- Certification Start Date
- Participant Name
- Activity Description
- Certification End Date
- Priority
- WIC Category
- High Risk Participant: Yes or No
- Termination Date (if applicable)
- Termination Reason (if applicable)
- Staff Name Modified

▼Transaction C	riteria								
Select Participant	t or Family Select Certific	Activity Cation	<b>Sta</b>	<b>rt Date</b> /2018	End Date 6/27/2022	<b>.</b>	Search		
Transaction H	istory							Total Items: 3	: 🕐
Occurrence Date	Activity [	Description	Part	ticipant Name	Staff	f Name M	odified	Staff Name Created	
7/3/2020	Certification		Rice Cereal		Cross rossroa	ds		Cross rossroads	
6/30/2021	Certification		Rice Cereal		CSC System S	Setup		Cross rossroads	
5/26/2022	Certification		Rice Cereal		Cross rossroa	ds		Cross rossroads	
Certification Start	Date	Participant Name	Activity Des	scription	Certificatio	n End Da	te	Priority	
5/26/2022		Rice Cereal	Certification		8/6/2022			Ш	
WIC Category Non-Breastfeeding		High Risk Participant No	t Terminatio	n Date	Terminatio	n Reason	1	Staff Name Modified Cross rossroads	
Certification Tran	saction Detail								

**<u>Note</u>**: The Transaction Detail information will vary based on the Selected Activity.

### Additional Features:

A View Signature button will be available for those transactions that require a signature.

Transaction H	Transaction History Total Items: 1 🕢						
Occurrence Date	Activity Description	Participant Name	Staff Name Modified	Staff Name Created			
6/28/2022	WIC Food Instrument Issuance	Vanilla Pudding	Cross rossroads	Cross rossroads			
Issue Date	Participant Name	Activity Description	First Date to Spend	Last Date to Spend			
6/28/2022	Vanilla Pudding	WIC Food Instrument Issuanc	e 6/28/2022	//23/2022			
Family ID F00600004684	FI Serial Number 135270606	Voided FI Void Date	Voided FI Void Reason	Staff Name Modified Cross rossroads			
Food Instrument	Issuance Transaction Detail						
				View Signature Cancel			

Click on **View Signature** and the signature will be displayed:

6/28/2022 WIC Food Instrum	nent Issuance	Vanilla Pu	liew Signature
Issue Date 5/28/2022 -amily ID :00600004684 Food Instrument Issuance Transac	Participant Name Vanila Pudding FI Serial Number 135270606		Vanilla D. Pudding

A **View Notification** () button will be included in the Transaction Detail if the Selected Activity includes a printed notification.

Contact Date 5/2/2022	Participant Name	Activity Description Communication Printed for Missed Food Benefit Issuance Appointment Notification
View Notification	Notification Sent To	
2		
Auto Dialer Response Date	Auto Dialer Response	
AMotifications		
-Notifications		

Click on  $(\mathcal{P})$  to view the notification:

Transaction H	Sent Communication
Occurrence Date	Missed Food Ponsiit Issuance Annointment
4/2/2022	Missed Food Benefic Issuance Appointment
4/2/2022	0/212/22
5/2/2022	
5/2/2022	
6/2/2022	
6/2/2022	
5/2/2022	Dear Participant/Parent/Guardian/Caretaker:
5/2/2022	
5/9/2022	hudson missed their WIC Food Benefit pickup appointment.
5/9/2022	
4/24/2022	If you have already received your WIC food instruments, thank you for picking them up.
4/24/2022	
5/15/2022	If you have not picked up your rood instruments, because your scheduled pick up date has passed, we may not be able to give
5/15/2022	your all of your root instruments. Prease pick up your remaining rood instruments so that you may get the most benefit from
6/24/2022	your we parteipaton.
0/24/2022	Please call the WIC office as soon as possible to make another appointment
Contact Date	
5/2/2022	
<b>View Notification</b>	
	Print Cancel
Auto Dialer Respo	

Important Note about Transfers:

An **individual** that has been transferred between families is no longer displayed in the **Journal of Transactions** of the family from which the individual was transferred.

The transferred **individual** is displayed in the **Journal of Transactions** of the receiving family.

#### Example:

Election Fa Family ID: F00600 5214 Vote Lane BOLIVIA, NC 284	amily 2004601 422	B B Court				
Transaction H	istory				Te	otal Items: 2 🕐
Occurrence Date	Activity Description	Participant Name	Sta	aff Name Modified	Staff Name	Created
11/3/2020	Transfer Individual From One Family T	A Jimmy Jones	Cross rossroads		Cross rossroads	
2/4/2020	Transfer Into the State	Jimmy Jones	CSC System Setup		Cross Roadsfour	
<b>Transfer Date</b> 11/3/2020	Particip Jimmy J	int Name nes	Activity Descript Transfer Individual	<b>ion</b> From One Family To Another F	From Family Name	<b>To Family Name</b> Election
From Location (Ag	jency Name/Clinic Name) To Loca	tion (Agency Name/Clinic Name)	VOC-In		VOC-Issued	<b>Comment Date</b>
Staff Name Modifie Cross rossroads	ed					