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

Iceland Family Family ID: F04900006485 541 Cold Way RURAL HALL, NC 27045				Josep Partici Age: 2 WIC Ca	h Iceland pant ID: 954465686N years and 6 months itegory: Child
Issue Food Instruments					0
Configuration					
Family Issuance Day     Issuance Frequency       5     3     Month(s)					
Family Issuance Members					Total Items: 1 🕐
Category Participant	Certification End Date	Aug	Sep	Oct	
Child Joseph Iceland	8/30/2017	1/3	Full	Full	Change Rx
ч <u> </u>					
Basketball Family Family ID: F04900006479 125 National Way RURAL HALL, NC 27045			Betty Basketball Participant ID: 954465634. Age: 26 years and 6 months WIC Category: Breastfeeding Woman		
Issue Food Instruments					0

Ener				Configuration						
Image: State										
amily	Issuance M	lembers					Total Items: 3 🕜			
	Category	Participant	Certification End Date	Aug	Sep	0ct				
Z	Breastfeeding	Betty Basketball	6/1/2017	Issued	Issued	Issued	Change Rx			
2	Infant	Nathan Basketball	6/1/2017	Issued	Issued	Issued	Change Rx			
1	Infant	Nancy Basketball	6/1/2017	Issued	Issued	Issued	Change Rx			
	mily 2 2	Issuance M   Category   Breastfeeding   Infant   Infant	Isuance Members   Category Participant   Breastfeeding Betty Basketball   Infant Nathan Basketball   Infant Nancy Basketball	Imily Issuance Members   Imin Nathan Basketball   Imin Nathan Basketball	Infant Certification End Date Aug   Infant Nathan Basketball 6/1/2017 Issued   Infant Nancy Basketball 6/1/2017 Issued   Infant Nancy Basketball 6/1/2017 Issued	Infant Aug Sep   Infant Nathan Basketball 6/1/2017 Issued Issued   Infant Nathan Basketball 6/1/2017 Issued Issued   Infant Nathan Basketball 6/1/2017 Issued Issued	Infant Aug Sep Oct   Infant Nancy Basketbal 6/1/2017 Issued Issued Issued   Infant Nancy Basketbal 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.
	ок

# 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.

Quick Links II New Family , Family Search	Iceland Family Family ID: F04900006485 S11 Codi Way RURAL HALL, NC 27045	e o Aph	IC Pa Au W	la Iceland articipant ID: 954465690 ge: 26 years and 6 month IC Category: Pregnant	i0L hs
Certification	Issue Food Instruments				0
Family Demographics Family Assessment Participant Demographics Income Information Health Information	Configuration Jamily Issuance Day Jamily Issuance Frequency 1 Month(s) Camily Issuance Hombar			Takal Tanana D	
Anthro / Lab	Participant Participant	Castification End Data	Aug (5-5 )	-t	
Dietary & Health	Precipant Ja Iceland	5/13/2017	Aug Sep C		
Assigned Risk Factors		Not	Selected Not Selected Not Se	ected Change Rx	
Certification Signature	Child Jiseph Iceland	8/30/2017 1/3	Not Selected Not Se	ected Change Rx	
Identification Document Family Merts Notes Scamed Documents Scamed Documents Issue Benefits Prescribe Food Issue FA Food Instrument Issue FM Food Instrument Scalange/Increase Formula Schange/Increase Formula Subsequent Certification					
Family Appointments	▼FDTS: 9/1/2016 - LDTS: 9/4/2016			Total Items: 7	0
Quick Appointments	Mik Low Est/Est free	Subcategory	1	Quantity UOM	1
Clinic Master Calendar	Production regulations Eggs Eggs Societ Bread/Whole Grans Cereal (Adult) Legunes Elsuance Anorenation	Sini and Young Hear - Cash Value Youcher Grade 'A' Large Vinte Eggs Jace 64 or. Whole Wheat Serad or Whole Grains Breakfast Cereal Dry Beans 1 pound bag OR Peanut Butter 15-18 or		\$8.00 \$\$\$ 1 Dozen 1 Contain 32 Ounces 18 Ounces 1 Contain	iers i iers
	Preview Checks Formula Wizard		Next Certification Due Notice	Issue Ca	ancel

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).

**Do not issue** <u>future</u> 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.'

Future Benefits exist for Transferring Participant (Paper)
One or more future benefits are currently issued for the individual selected for transfer. The participant's current family must return to have their future month's benefits voided and reissued. Note that selecting Transfer will proceed with the transfer process regardless of future benefit issuance. Future benefits will remain in an issued status and will not be available for reissunace in the new family.
Transfer Cancel

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.

In State Individual to Fan	nily Transfer Confirmation						? 💌
the following transfer?							
	Individuals being transferre Joseph Iceland	d			Receiving Family Info	rmation —	
vidualsTotal Items: 2 🕐	Benefits to cover Change in Family Issuance Day 09/01 - 09/17 Total Items: 7 🕢			F04900006479	Individuals Total Items: 3		
ategory Name	Food Category	Food Subcategory	Quantity	UOM		WIC Category	Name
ant Ida Iceland	Eggs	Grade "A" Large White Eggs	1	Dozen	Parent/Guardian	Breastreeding	Betty Basketball
Josephitelanu	Cereal (Adult)	Breakfast Cereal	24	Ounces	Betty Basketball	Infant	Nancy Baskethall
	Legumes	Dry Beans 1 pound bag OR Peanut Butter 16-18 oz	1	Containers		amone	Indircy base updi
	Bread/Whole Grains	Whole Wheat Bread or Whole Grains	32	Ounces	Address		
	Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Voucher	\$8.00	\$\$\$	125 National Way		
	Juice 64	Juice 64 oz.	1	Containers	RURAL HALL, NC, 27045		
	Milk Low Fat/fat free	Skim or 1% Milk	3	Gallons			
4						0	K Cancel

## 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).

## 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.

		💄 Issue Food Instrumen	ts 🛓 Cross RoadsTwo
Home Family Services Sche	uling Vendor Operations Finance Administration Help		Logout 台
Quick Links Image: Constraint of the second secon	Basketball Family Family ID: F0490006479 125 Hastond Way RIRAL HALL, NC 27045 Betty Nathan Nancy Joseph Iceland	Betty B Participa Age: 26 WIC Cate	asketball nt ID: 954465634L years and 6 months gory: Breastfeeding Woman
🛙 😤 Certification	Jecus Food Instruments		0
Eamly Demographics	1550C FOOD INSCRIMENCES		
Family Assessment	Configuration		
Participant Demographics Income Information	Family Issuance Day Ja Summer Sequency A Month(s)		
Health Information	Family Issuance Members		Total Items: 4 🕢
Eco-Social Assessment	Category Participant Certification End Date	Aug Sep Oc	t
Dietary & Health	Breastfeeding Betty Basketball 6/1/2017	Issued Issued Issued	Change Rx
Certification Signature	Infant Nathan Basketball 6/1/2017	turned turned turned	
Certification Summary		Issued Issued Issued	Change Kx
Identification Document Family Alerts	Infant Nancy Basketball 6/1/2017	Issued Issued Issued	Change Rx
Notes	Child Joseph Iceland 8/30/2017	Issued Full Full	Change Rx
Scanned Documents			
🗄 🚱 Care Plan			
🕬 Issue Benefits			
Prescribe Food	EDTS: 0/19/2016 - LDTS: 10/17/2016		Total Itoms: 7
Issue Food Instruments	*rbis. 9/18/2010 - Lbis. 10/17/2010		Our at the HOM
Issue FM Food Instruments	Nik Low Fat/fat free Skim or 1% Nik	category	4 Gallons
Food Instrument List	Fruit & Vegetables Cash Value Fruit and Vegetables - Cash Value Voucher		\$8.00 \$\$\$
Exclange/indedser official	Eggs Grade "A" Large White Eggs		1 Dozen
Journal of Transactions	Bread/Whole Grains Whole Grains		32 Ounces
Subsequent Certification	Cereal (Adult) Breakfast Cereal		36 Ounces
	Legumes Dry beans 1 pound bag OR Peanut Butter 1	5-18 oz	1 Containers
Scheduling System	<b>FDTS: 10/18/2016 - LDTS: 11/17/2016</b>		Total Items: 7 🕜
Pamily Appointments	Food Category Subo	category	Quantity UOM
Clinic Master Calendar	Mik Low Fat/fat free Skim or 1% Mik		4 Gallons
Contraction Concernation	Ecos Grade "A" Larce White Ecos		1 Dozen
	Juice 64 Juice 64		2 Containers
	Bread/Whole Grains Whole Wheat Bread or Whole Grains		32 Ounces
	Cereal (Adult) Breakfast Cereal	5 19 ea	36 Ounces
	Leguines Dry Beans I pound bag OK Peanut Butter II	5-10-02	1 Containers
	Alssuance Annrenation		
	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.