### **CNDS Facts**

Crossroads interfaces with the North Carolina **Common Name Database Services** system (CNDS). The CNDS system provides individuals with a unique identifying number, separate from their social security number. The CNDS ID is used state-wide by programs such as Medicaid, SNAP and Work First. The CNDS ID is the participant ID used in Crossroads. A link with CNDS is made from the **Participant Demographics** screen.

### If a WIC participant already has a CNDS ID provided by Medicaid, SNAP or Work First:

- The participant's first name, last name, gender and date of birth (DOB) in Crossroads must match the data in CNDS.
- WIC staff cannot change first name, last name, gender or DOB of the participant even if the data is incorrect.
- Attempting to change these data fields will result in the following error messages:
  - "Changes not accepted"
  - "CNDS and Crossroads don't match DOB"
- The participant must contact Medicaid to report a name change, inaccurate gender or inaccurate DOB in CNDS.
- Race and ethnicity data can always be updated by WIC staff.
- When **Select** is clicked from the **CNDS Person Search Results** pop-up box, the data entered into Crossroads will change to the data coming from CNDS if they do not match.

### If WIC is the first agency to assign the participant's CNDS ID:

- WIC staff can change the first name, last name, gender or DOB of the participant in Crossroads up until the **Certify** button is clicked (any time the participant's status is "applicant").
- After the participant is certified (status is "active/certified"), only race and ethnicity can be updated by WIC staff.
- The Community Nutrition Services Section (CNSS) Customer Service Desk (CSD) can update the gender and/or the DOB of active/certified participants. Please contact the CSD if updates are needed.
- If the WIC participant successfully applies for Medicaid after WIC assigns a CNDS ID, the *participant* must contact Medicaid to report a name change

### "Refresh from CNDS" button:

- Button is available on the **Patient Demographics** screen, if WIC participant already has a CNDS number.
- When button is selected, data elements (first/last name, gender, DOB, race/ethnicity) are transferred from CNDS to Crossroads.
- Best Practice: Click Refresh from CNDS button every time a participant is seen at WIC to ensure data is up-to-date.

#### **CNDS Person Search Results:**

- **Participant Demographics** is the default and results are displayed automatically. If used, there is the potential to return many records.
- Click the **Select** button next to the matching CNDS ID for the participant.
- If no matches are returned OR the participant is not found in the search results, ask probing questions such as:
  - Did you change your name recently?
  - What is your maiden name?
- Use these answers and NC TRACKS to search for the participant's current Medicaid ID.
- If the participant has a current Medicaid card, use the **CNDS ID** radio button (described below) to search for a match.
- Selecting the **CNDS ID** radio button, entering a CNDS ID number and clicking **Search** will return one record if a match exists.
- Best practice is to search by CNDS ID whenever possible, as this is the same number as the participant's current Medicaid ID.
- Make every effort to find a match.
- If the participant still cannot be found, use **Create in CNDS**.

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### **CNDS Scenarios**

Some participants will already have a CNDS ID and others will not. The first three scenarios describe assigning a CNDS ID for the first time. Screenshots are shown.

Scenario 1: Participant does not have a CNDS ID.

Scenario 2: Participant does have a CNDS ID but it is NOT currently linked to the Crossroads WIC record.

Scenario 3: Participant does have a CNDS ID and it IS currently linked to the Crossroads WIC record.

### Scenario 1: Participant does not have a CNDS ID

**NOTE**: Participant's ID is **NC** followed by a series of numbers when the application is started. This is a temporary ID. This will change to the **CNDS ID** after the following steps are completed.

- 1. Complete the Family Demographics and Family Assessment screens.
- 2. Navigate to Participant Demographics.
- 3. Complete the **Race/Ethnicity** fields and any other starred fields that are incomplete.
- 4. Click Link from CNDS button.
- 5. **CNDS Person Search Results** appears. Since the participant does not have a CNDS ID (has never had Medicaid, SNAP or Work First) the results container is empty.
- 6. Click the Create in CNDS button.





October 28, 2024... Page 3 of 8

Create Person In CNDS?

Do you want to create this Person in CNDS?

- 7. Create Person in CNDS? pop-up appears.
- 8. Click **OK.**
- 9. Status Message is received: "Participant [Name] was saved successfully."
- 10. The participant ID is now the CNDS number.
- 11. Click Save.
- 12. Crossroads navigates automatically to the **Income Information** screen.

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# Scenario 2: Participant has a CNDS ID but it is not currently linked to the Crossroads WIC record.

**NOTE**: Participant's ID is a temporary ID. This will change to the **CNDS** after the following steps are completed.

- 1. Complete the Family Demographics and Family Assessment screens.
- 2. Navigate to Participant Demographics.
- 3. Complete the **Race/Ethnicity** fields and any other starred fields that are incomplete.
- 4. Click Link from CNDS button.
- CNDS Person Search Results appears.
   Participant Demographics is the default and results are displayed automatically. In this case, the participant is listed. Verify DOB and other data elements.
- 6. Click the **Select** button next to the matching CNDS ID for the participant.



- 7. Link CNDS Person? pop-up appears. Select OK.
- 8. **Status Message** is received: "Participant [Name] is linked to CNDS successfully. All demographic values were replaced with CNDS values."
- 9. Click Save.
- 10. Crossroads navigates automatically to the **Income Information** screen.





Scenario 3: Participant does have a CNDS ID and it <u>IS</u> currently linked to the Crossroads WIC record.

NOTE: Participant's ID is also their CNDS ID.

- 1. Complete the Family Demographics and Family Assessment screens.
- 2. Navigate to Participant Demographics.
- 3. Complete the **Race/Ethnicity** fields and any other starred fields that are incomplete.
- 4. Click Refresh from CNDS button.
- 5. **Status Message** is received: "CNDS information was copied successfully."
- 6. Click Save.
- 7. Crossroads navigates automatically to the **Income Information** screen.

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In scenarios 4 and 5, the WIC participant has CNDS X assigned in Crossroads, <u>but has a current Medicaid card with CNDS Y</u>. Two different sets of messages may be received after selecting **Refresh from CNDS**. Screenshots are not shown for these scenarios.

### Scenario 4: Refresh from CNDS – Pass

WIC participant has 2 CNDS numbers: X in Crossroads and Y on their current Medicaid card. User selects **Refresh from CNDS** and system refreshes, no errors received. (Status Message = "CNDS information was copied successfully.") User needs to reassign the Crossroads CNDS ID to match the current Medicaid ID. See steps to take in Crossroads below Scenario 5.

### AND

### Scenario 5: Refresh from CNDS – Fail

WIC participant has 2 CNDS numbers: X in Crossroads and Y on their current Medicaid card. User selects **Refresh from CNDS** and "Refresh from CNDS Failed" or "CNDS ID not found" message appears. User needs to reassign the Crossroads CNDS ID to match the current Medicaid ID. Steps to take in Crossroads:

### 1. Choose Link From CNDS button on Participant Demographics screen.

### 2. CNDS Person Search Results container displays.

- a. Select the row that matches the CNDS ID on the current Medicaid card **OR** (if no results or matches are returned)
- b. Select the **CNDS ID** radio button, enter a verified CNDS ID into the field and select **Search**.
- c. Select the row that matches the CNDS ID on the current Medicaid card
- 3. Link CNDS Person? confirmation appears. Select OK.
- 4. Do you wish to merge? confirmation appears. Select No.

#### **Result:**

### Application returns to Participant Demographics screen.

Participant ID in upper right-hand corner populates with correct CNDS.

Status Message is received: "Participant [Name] is linked to CNDS successfully.

All demographic values were replaced with CNDS values."

CNDS number Y will now display in Crossroads as their Participant ID.

The last scenario describes steps to take if an incorrect date of birth or gender is found in Crossroads. No screenshots are shown for this scenario.

### Scenario 6: Duplicate Records

An incorrect DOB or gender can be updated by the CNSS CSD.

Prior to Update Data Items functionality, local users needed to add duplicate records to correct an inaccurate DOB or Gender. There continue to be duplicate records in Crossroads due to user error (not completing a statewide search) and a fixed Crossroads transfer defect. When duplicate records are created, the correct CNDS may be connected to the wrong (not used) record. When this occurs, please follow these steps to release the correct CNDS from the wrong (not used) record.

- 1. Terminate the client with the duplicate record that should not be used
  - a. Navigate to the **Certification Summary** screen and select **Terminate Certification**. NOTE: If the Terminate Certification button is greyed out/not active, call the CNSS Customer Service Desk for assistance.
  - b. Select termination reason "duplicate record identified."
  - c. Select **Save**. Participant status changes to "Certification Terminated" and the Status Message "[NAME's] current certification was terminated successfully. Benefits issuance will be prevented" appears.
  - d. Select the Generate New ID button. NOTE: at this time, only a CPA has access to the Generate New ID button.
  - e. **Replace CNDS ID** validation appears: "Are you sure you want to replace existing Participant ID with ##00?" Select **Yes**.
  - f. Crossroads changes the CNDS ID to the same CNDS# but with "00" at the end.
- 2. Complete the Duplicate Participants form (below) and fax to the CNSS Customer Service Desk (CSD). The CSD will process/link the duplicate records.

Complete this form and fax to the Community Nutrition Services Section Customer Service Desk to have duplicate participant records processed.

Correct	Correct	Incorrect	Incorrect	Participant's Agency and Clinic
Family ID	Participant ID	Family ID	Participant ID	
	Correct Family ID			

Staff	Signature
-------	-----------

**Printed Name** 

#### Agency Name

This form contains confidential information regarding your WIC participants. Do not email this form unless your electronic document is password protected to prevent viewing and opening. If sending electronically, send the password in separate correspondence. All communications to CNSS will be handled in a secure manner.

Email:	CNS.CustomerSer	vice@DHHS.nc.gov Fa		(919) 870 - 48	363
CNSS Repres	entative:	Date Received	Initials	Approved Date	Tracking #

Date Signed

Fax Number

#### **Direct Phone Number**