

## Crossroads Duplicate Participant Records Form

### 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.
- If the WIC participant successfully applies for Medicaid after WIC assigns a CNDS ID, WIC may no longer be able to change CNDS data, and the participant must contact Medicaid to report a name change, inaccurate gender or inaccurate DOB in CNDS.

#### **"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.

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### 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 FAST 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.

The screenshot shows the 'CNDS Person Search Results' window. Under 'Search Criteria', the 'Participant Demographics' radio button is selected. A table displays 3 results. Each row has a 'Select' button next to the 'CNDS ID' column.

Selection	CNDS ID	First Name	Last Name	MI	Suffix	Date of Birth	Gender	Language	Race Codes	Ethnicity
Select	95 170	DA	SA	M		11 9	F	EN	W	
Select	90 12K	DU	SA	M		12 9	F	EN	W	Not Hispanic/Latino
Select	90 10L	DE	SA	M		12 9	F	EN	B	Not Hispanic/Latino

- 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**.

The screenshot shows the 'CNDS Person Search Results' window. Under 'Search Criteria', the 'CNDS ID' radio button is selected. The input field for the CNDS ID is highlighted with a red box, containing the text '95 10'. The 'Total Items' count is 0.

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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.

The screenshot shows the 'Participant Demographics' form for 'Broncos Family'. The 'Temporary ID' field is highlighted with a red box. The 'Link from CNDS' button is also highlighted with a red box. The form includes fields for General Information, Race/Ethnicity, Physical Presence, and Employment Status.

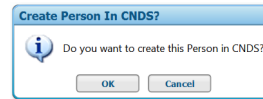
5. **CNDS Person Search Results** appears. Since the participant does not have a CNDS ID (has never had Medicaid, Food Stamps or Work First) the results container is empty.
6. Click the **Create in CNDS** button.

The screenshot shows the 'CNDS Person Search Results' window. The search criteria are set to 'Participant Demographics' and 'CNDS ID'. The results table is empty. The 'Create in CNDS' button is highlighted with a red box.

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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.

The screenshot shows the 'Participant Demographics' form. At the top right, participant information is displayed: Participant ID: 00000000155, Age: 1 year and 5 months, WIC Category: Child. The form is divided into several sections: 'Identity Information' (Last Name, First Name, M.I., Nickname, Suffix, Gender), 'Race/Ethnicity' (Declared/Observed, Ethnicity, Race), 'Physical Presence' (Yes/No, Exception Reason, Special Needs), and 'Foster Child' (Yes/No, Entry Date, Proof of Foster Care). At the bottom right, the 'Link from CNDS' button is highlighted with a red box.

5. **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.

The screenshot shows the 'CNDS Person Search Results' window. It has a search criteria section with 'Participant Demographics' selected. Below is a table with one row of results. The 'Select' button next to the first column is highlighted with a red box.

Selection	CNDS ID	First Name	Last Name	MI	Suffix	Date of Birth	Gender	Language	Race Codes	Eth
Select	952					1011	F	EN	W	Not Hisp

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.

The screenshot shows a pop-up dialog box titled 'Link CNDS Person?'. It contains an information icon and the text: 'Do you want to link this CNDS record with the participant?'. There are 'OK' and 'Cancel' buttons at the bottom.

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**Scenario 3: Participant does have a CNDS ID and it IS 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.

The screenshot shows the 'Participant Demographics' form in the Crossroads system. The form is titled 'Participant Demographics' and 'Cross roads'. It contains several sections for data entry:

- General Information:** Includes fields for Last Name, First Name, H.I., Nickname, Suffix, Gender, Date of Birth, and Age.
- Identity Information:** Includes fields for Proof of Identification, WIC Category, and Age.
- Race/Ethnicity:** Includes checkboxes for Race (American Indian or Alaskan Native, Asian, Black or African American, White, Native Hawaiian or Pacific Islander) and Ethnicity (Not Hispanic/Latino).
- Physical Presence:** Includes checkboxes for Physical Presence and Physical Presence Exception Reason.
- Foster Child:** Includes checkboxes for Foster Child, Foster Care Entry Date, and Proof of Foster Care.

At the bottom right of the form, there is a red box highlighting the 'Refresh from CNDS' button. Other buttons visible are 'Link From CNDS' and 'Cancel'.

## Crossroads Duplicate Participant Records Form

In scenarios 4 and 5, the WIC participant has CNDS X assigned in Crossroads, but has a current Medicaid card with CNDS Y. 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.

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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: Incorrect DOB or Gender in Crossroads

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.



## Crossroads Duplicate Participant Records Form

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

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

\_\_\_\_\_  
**Staff Signature**

\_\_\_\_\_  
**Date Signed**

\_\_\_\_\_  
**Printed Name**

\_\_\_\_\_  
**Direct Phone Number**

\_\_\_\_\_  
**Agency Name**

\_\_\_\_\_  
**Fax Number**

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.CustomerService@DHHS.nc.gov

Fax: 984.236.8263

CNSS Representative:

Date Received	Initials	Approved Date	Tracking #