

Journal of Transactions

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

- New Family
- Family Search
- Certification
 - Family Demographics
 - Family Assessment
 - Participant Demographics
 - Income Information
 - Certification Signature
 - Anthro / Lab
 - Health Information
 - Eco-Social Assessment
 - Dietary & Health
 - Assigned Risk Factors
 - Certification Summary
 - Issue EBT Card
 - Family Alerts
 - Notes
 - Scanned Documents
- Care Plan
- Issue Benefits
- Journal of Transactions**

Cereal Family
Family ID: F00600004594
854 Gerber Way
BOLIVIA, NC 28422

Rice Cereal
Participant ID: 960138696N
Age: 27 years
WIC Category: Non-Breastfeeding Woman

Transaction Criteria

Select Participant or Family: All | Select Activity: All | Start Date: 5/27/2022 | End Date: 6/27/2022 | Search

Transaction History Total Items: 0

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

Cereal Family
Family ID: F00600004594
854 Gerber Way
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Rice Cereal
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Transaction Criteria

Select Participant or Family: All | Select Activity: All | Start Date: 5/27/2022 | End Date: 6/27/2022 | Search

Transaction History Total Items: 0

Activity Description	Participant Name	Staff Name Modified	Staff Name Created
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Journal of Transactions

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)

Note: 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 Family
Family ID: F00600004594
 854 Gerber Way
 BOLIVIA, NC 28422



Rice Cereal
Participant ID: 960138696N
Age: 27 years
WIC Category: Non-Breastfeeding Woman

Transaction Criteria

Select Participant or Family: Rice Cereal
Select Activity: Certification
Start Date: 1/1/2018
End Date: 6/27/2022

Transaction History 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
6/30/2021	Certification	Rice Cereal	CSC System Setup	Cross rossroads
5/26/2022	Certification	Rice Cereal	Cross rossroads	Cross rossroads

Certification Transaction Detail

Journal of Transactions

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 Criteria ?

Select Participant or Family: Rice Cereal Select Activity: Certification Start Date: 1/1/2018 End Date: 6/27/2022

Transaction History 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
6/30/2021	Certification	Rice Cereal	CSC System Setup	Cross rossroads
5/26/2022	Certification	Rice Cereal	Cross rossroads	Cross rossroads

Certification Start Date 5/26/2022	Participant Name Rice Cereal	Activity Description Certification	Certification End Date 8/6/2022	Priority III
WIC Category Non-Breastfeeding	High Risk Participant No	Termination Date	Termination Reason	Staff Name Modified Cross rossroads

[Certification Transaction Detail](#)

Note: 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 History Total Items: 1 ?

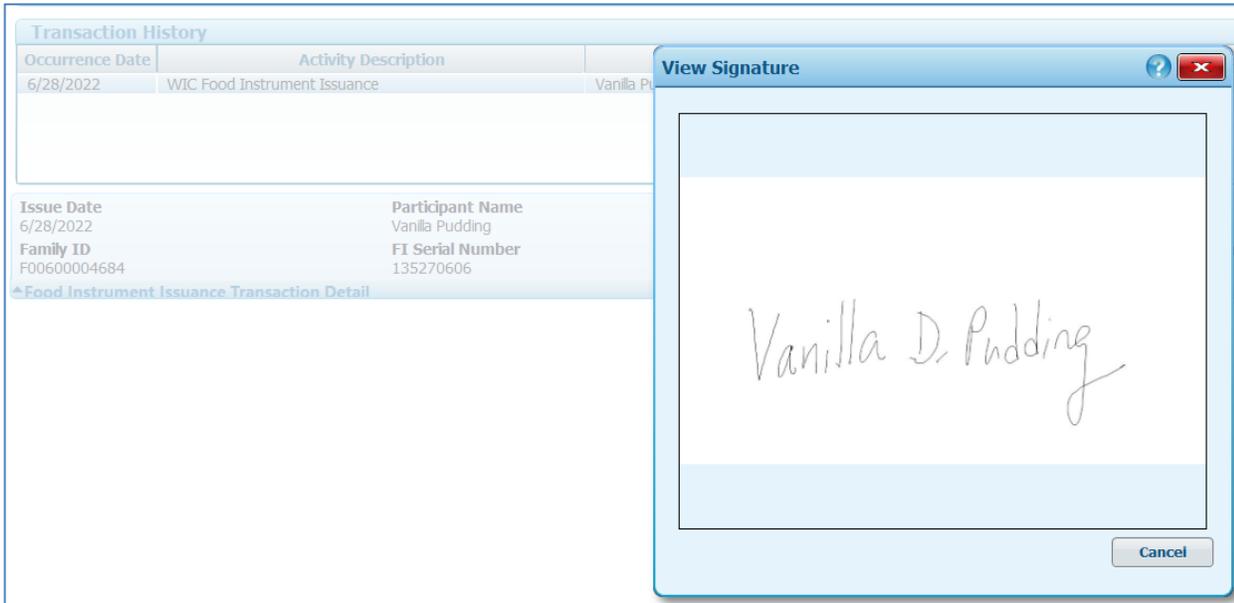
Occurrence Date	Activity Description	Participant Name	Staff Name Modified	Staff Name Created
6/28/2022	WIC Food Instrument Issuance	Vanilla Pudding	Cross rossroads	Cross rossroads

Issue Date 6/28/2022	Participant Name Vanilla Pudding	Activity Description WIC Food Instrument Issuance	First Date to Spend 6/28/2022	Last Date to Spend 7/23/2022
Family ID F00600004684	FI Serial Number 135270606	Voided FI Void Date	Voided FI Void Reason	Staff Name Modified Cross rossroads

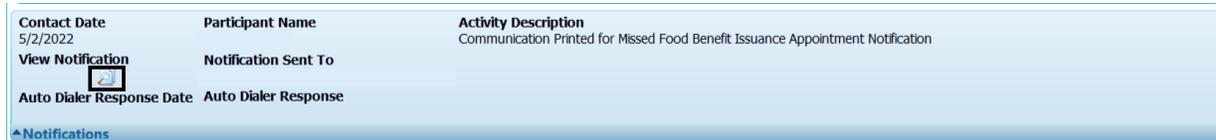
[Food Instrument Issuance Transaction Detail](#)

Journal of Transactions

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



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



Click on  to view the notification:

Journal of Transactions

Transaction History

Sent Communication

? ✖

Occurrence Date

4/2/2022

4/2/2022

5/2/2022

5/2/2022

6/2/2022

6/2/2022

5/2/2022

5/2/2022

5/9/2022

5/9/2022

4/24/2022

4/24/2022

5/15/2022

5/15/2022

6/24/2022

6/24/2022

5/2/2022

Missed Food Benefit Issuance Appointment

Dear Participant/Parent/Guardian/Caretaker:

hudson missed their WIC Food Benefit pickup appointment.

If you have already received your WIC food instruments, thank you for picking them up.

If you have not picked up your food instruments, because your scheduled pick up date has passed, we may not be able to give you all of your food instruments. Please pick up your remaining food instruments so that you may get the most benefit from your WIC participation.

Please call the WIC office as soon as possible to make another appointment.

Contact Date

5/2/2022

View Notification

Auto Dialer Resp

Print Cancel

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 Family

Family ID: F00600004601

5214 Vote Lane

BOLIVIA, NC 28422

Governor

Jimmy Jones

Court

Transaction History				Total Items: 2
Occurrence Date	Activity Description	Participant Name	Staff Name Modified	Staff Name Created
11/3/2020	Transfer Individual From One Family To A	Jimmy Jones	Cross rossroads	Cross rossroads
2/4/2020	Transfer Into the State	Jimmy Jones	CSC System Setup	Cross Roadsfour

Transfer Date	Participant Name	Activity Description	From Family Name	To Family Name
11/3/2020	Jimmy Jones	Transfer Individual From One Family To Another F	Jones	Election
		VOC-In	VOC-Issued	Comment Date

Staff Name Modified
Cross rossroads

[Transfers Transaction Detail](#)