CROSSROADS WIC PROJECT

FAMILY SERVICES (CLINIC) USER MANUAL

CSC

Prepared By:
CSC
10975 Grandview
Overland Park, KS 66210

Prepared For:
Crossroads Staff

Submitted To:
Crossroads Staff

WIC

THIS PAGE INTENTIONALLY LEFT BLANK

DOCUMENT INFORMATION

Document Information	
Document Title	Family Services (Clinic) User Manual
Project Name	Family Services (Clinic)
Document Version	7.0
Author	CSC
Contract Number	02476-09
Document Creation Date	09/01/2011
Document Current Version Date	1/29/2016
Purpose of Document	User Manual

DOCUMENT REVISION HISTORY

Document Revision History			
Version	**Date**	**Author(s)**	**Description**
1.0	09/01/2011	CSC	First Draft
2.0	02/12/2013	CSC	User Acceptance Testing (UAT) Training Version
3.0	7/12/2013	CSC	Revisions
4.0	11/18/2014	CSC	User Manual Updates
5.0	04/17/2015	CSC	Reviewed document to ensure consistency with 1.7.0.0 release.
6.0	8/28/2015	CSC	Reviewed document to ensure consistency with 1.8.1.0 release.
7.0	1/29/2016	CSC	Accepted all previous changes and updated to be consistent with software version 1.9.1.0. and 1.10.0.0 release.

TABLE OF CONTENTS

1- OVERVIEW 1-1

2- CROSSROADS OVERVIEW 2-1

Crossroads Overview, Logging In, and Navigation 2-1

Task A. Logging into the Crossroads WIC Application 2-2

Task B. Navigating within the Crossroads Application 2-6

3- NEW FAMILY 3-1

New Family 3-1

Task A. Adding a New Family Record – Family Section 3-2

Task B. Adding a New Family Record – Participant Section 3-10

4- FAMILY SEARCH 4-1

Family Search 4-1

Task A. Conducting a Search and Accessing a Family Record 4-2

Adding a New Member to an Existing Family 4-6

Task A. Adding a Member Record to an Existing Family 4-7

5- CERTIFICATION 5-1

Certifying a Pregnant Woman and Her Two-year Old Child 5-1

Task A. Certifying the Family – Family Demographics Screen 5-3

Task B. Certifying the Family – Family Assessment Screen 5-8

Task C. Certifying the Family – Participant Demographics Screen 5-10

Task D. Certifying the Family – Income Information Screen 5-16

Task E. Certifying the Family – Certification Signature Screen 5-22

Task F. Certifying the Family – Health Information Screen 5-27

Task G. Certifying the Family – Anthro/Lab Screen 5-36

Task H. Certifying the Family – Eco-Social Assessment Screen 5-45

Task I. Certifying the Family – Dietary & Health Screen 5-48

Task J. Certifying the Family – Assigned Risk Factors Screen 5-51

Task K. Certifying the Family – Certification Summary Screen 5-55

Certifying a Non-Breastfeeding Woman and Infant 5-58

Task A. Certifying the Family – Family Demographics Screen 5-59

Task B. Certifying the Family – Family Assessment Screen 5-65

Task C. Certifying the Family – Participant Demographics Screen 5-66

Task D. Certifying the Family – Income Information Screen 5-70

Task E. Certifying the Family – Certification Signature Screen 5-73

Task F. Certifying the Family – Health Information Screen 5-75

Task G. Certifying the Family - Anthro/Lab Screen 5-82

Task H. Certifying the Family – Eco-Social Assessment Screen 5-87
Task I. Certifying the Family – Dietary & Health Screen 5-90
Task J. Certifying the Family – Assigned Risk Factors Screen 5-93
Task K. Certifying the Family – Certification Summary Screen 5-97
Issuing EBT Cards 5-100
Task A. Issue an EBT Card 5-101
Task B. Deactivate EBT Cards 5-104
Task C. Replace an EBT Card 5-106
Family Alerts 5-108
Task A. Adding Alerts 5-109
Task B. Inactivating Alerts 5-114
Task C. Editing an Alert 5-116
Immunization Status 5-120
Task A. Documenting Immunization Status 5-121
Document Assessment 5-124
Task A. View Document Assessment 5-125
Notes 5-127
Task A. Adding Notes 5-128
Task B. Canceling Notes 5-130
Scanned Documents 5-131
Task A. Viewing Scanned Documents 5-132
Working with Other Types of Certification 5-134
Task A. Documenting Missing Proof – Temporary Certifications 5-135
Task B. Assigning Presumptive Eligibility to Certify Pregnant Women 5-138
Task C. Assigning a Risk Factor to Remove Presumptive Eligibility 5-145
Task D. Documenting Missing Proof – Pending Applications 5-149
6- INCOME SCREENING CALCULATOR 6-1
Income Screening Calculator 6-1
Task A. Calculating Income for an Applicant 6-2
7- CARE PLAN 7-1
Breastfeeding Peer Counseling 7-1
Task A. Document Breastfeeding Peer Counselor and Lactation Consult Interactions with a Participant 7-2
Care Plan Summary 7-9
Task A. Viewing the Family Care Plan Summary 7-10
Task B. Viewing the Individual Care Plan Summary 7-12
Care Plan Detail 7-16
Task A. Viewing Care Plan Details 7-17

Referral Program **7-20**
Task A. Making and Documenting Referrals 7-21
Nutrition Education **7-25**
Task A. Filtering to Select Nutrition Education Topics 7-26
Task B. Selecting Nutrition Education Topics 7-27
Task C. Documenting a Refusal 7-29
Task D. Scheduling a Group Nutrition Education Class 7-31
Maintain Goals **7-34**
Task A. Documenting Goals 7-35
Task B. Viewing the Assigned Goals History 7-39

8- ISSUE BENEFITS **8-1**
Prescribe Food: Adding and/or Modifying Food Prescriptions for a Woman or a Child **8-1**
Task A. Creating New Food Prescription, Issuance Date, or Frequency 8-2
Task B. Modifying Food Prescription Items 8-6
Task C. Adding Food Prescription Items 8-7
Prescribe Food: Adding and/or Modifying Food Prescriptions for Formula-fed Infants **8-12**
Task A. Creating a New Food Prescription, Issuance Day or Frequency 8-13
Task B. Modifying the Subcategory or Quantity of Infant Formula 8-14
Task C. Adding Formula to Fully Breastfeeding Package 8-16
Prescribe Food: Changing from Breastfeeding to Non-Breastfeeding **8-20**
Task A. Changing WIC Category of Woman from Breastfeeding (BF) to Non-BF and Changing the Infant's BF Status from Fully Breastfed to Fully Formula Fed 8-21
Task B. Changing Food Prescription of Infant to Provide Formula 8-24
Prescribe Food: Voiding and Replacing Benefits Due to Formula Change **8-26**
Task A. Identifying Food Instruments that Have Been Issued and Redeemed and Voiding Food Instruments as Necessary 8-27
Task B. Selecting a Replacement Formula and Issuing Future Benefits 8-30
Task C. Replacing the Current Month's Benefits 8-33
Issue Food Instruments **8-37**
Task A. Issuing Family Benefits 8-38
Task B. Issuing Family Benefits Prior to the Family Issuance Day 8-42
Task C. Issuing Family Benefits Prior to the Family Issuance Day (Additional Examples) 8-46
Issue Food Instruments: Formula Wizard **8-49**
Task A. Using the Formula Wizard 8-50
Issue Food Instruments: Changing the Benefit Issuance Frequency of a Family **8-57**
Task A. Changing the Benefit Issuance Frequency of a Family 8-58
Issue Food Instruments: Working with Prorated Food Packages **8-61**
Task A. Issuing Benefits to a New Member when the Family Issuance Day is Beyond the Date of New Issuance 8-62

Issue FM Food Instruments **8-64**
Task A. Issuing Farmers Market Food Instruments 8-65
Food Instrument List **8-69**
Task A. Searching for Food Instruments to Void or Replace 8-70
Task B. Voiding Selected Food Instruments 8-73
Task C. Replacing Selected Food Instruments 8-76
Replace Current Benefits **8-80**
Task A. Replacing Current Benefits (Food Items Only) 8-81
Exchange and/or Increase Formula **8-85**
Task A. Exchanging Formula (No Increase to the Amount) 8-86
Task B. Exchanging Formula (and Increasing the Amount) 8-93
Void Farmers Market Food Instruments **8-102**
Task A. Voiding Farmers Market Food Instruments 8-103

9- BREASTFEEDING SUPPORT **9-1**
Issuing, Reserving, Monitoring, and Returning Breast Pumps **9-1**
Task A. Issuing or Reserving a Breast Pump 9-2
Task B. Following-Up on Breast Pump Issuances 9-9
Task C. Returning a Breast Pump 9-11

10- TRANSFER **10-1**
Between Agency or Clinic **10-1**
Task A. Logging into the Clinic Receiving the Family Record 10-2
Task B. Accessing the Family Record and Completing the Agency and/or Clinic Transfer 10-3
Between Families: Transferring a Participant Between Two Existing Family Records **10-8**
Task A. Logging into the Clinic where the Participant will be Transferred 10-9
Task B. Using Family Search to Find the Participant to Transfer 10-10
Task C. Voiding Future Benefits Prior to the Transfer 10-12
Task D. Selecting an Existing Family Record 10-15
Task E. Re-issuing Future Benefits of the Original Family 10-19
Task F. Re-issuing Future Benefits of the Receiving Family 10-21
Between Families: Transferring a Participant Between Families – Existing to Newly Created Family **10-24**
Task A. Logging into the Clinic where the Participant will be Transferred 10-25
Task B. Using Family Search to Find the Participant to Transfer 10-26
Task C. Voiding Future Benefits Prior to the Transfer 10-28
Task D. Transferring Between Families 10-31
Task E. Creating a New Family Record 10-32
Task F. Re-issuing Future Benefits for the Receiving Family 10-38
Task H. Re-issuing Future Benefits of the Original Family 10-40
Between Families: Transferring a Foster Infant/Child to Another Foster Family **10-42**

Task A. Completing the Transfer 10-43
Between Families: Transferring a Foster Infant/Child to a Non-Foster Family 10-47
Task A. Completing the Transfer 10-48
Out of State 10-52
Task A. Logging into Crossroads 10-53
Task B. Using Family Search 10-54
Task C. Transferring Participants out of the State 10-56
Into State: Into a New Family Record 10-60
Task A. Logging into Crossroads 10-61
Task B. Using Family Search 10-62
Task C. Creating a New Family 10-64
Task D. Transferring Participants into the State 10-66
Into State: Into an Existing Family Record 10-69
Task A. Logging into Crossroads 10-70
Task B. Using Family Search 10-71
Task C. Transferring Participants into the State 10-74
11- JOURNAL OF TRANSACTIONS 11-1
Journal of Transactions 11-1
Task A. Searching and Sorting Journal Transaction History 11-2
12- FAMILY SERVICES ANALYSIS 12-1
Family Services Analysis 12-1
Task A. Viewing Local Agency Statistics 12-2
13- CLINIC FAMILY WORKFLOW DASHBOARD 13-1
Clinic Family Workflow Dashboard 13-1
Task A. Viewing Clinic Family Workflow Activity 13-2
Task B. Checking-In Families for Appointments 13-5
Task C. Working with In-Progress Appointments 13-8
Task D. Creating Walk-in Appointments 13-10
14- DELAYED SIGNATURES FOR FI ISSUANCE 14-1
Delayed Signatures for FI Issuance 14-1
Task A. Capture Delayed Signature for FI Issuance 14-2
Task B. Void Food Instruments with Signature Previously Delayed 14-3
15- REPORTING DEATH IN FAMILY 15-1
Reporting Death in Family 15-1
Task A. Reporting a Death in the Family 15-2
16- SUBSEQUENT CERTIFICATION 16-1

Subsequent Certification of a Breastfeeding Woman and an Initial Certification of Her Infant 16-1

Task A. Subsequent Certification – Family Demographics Screen 16-2
Task B. Subsequent Certification – Family Assessment Screen 16-11
Task C. Subsequent Certification – Participant Demographics Screen 16-13
Task D. Subsequent Certification – Income Information Screen 16-17
Task E. Subsequent Certification – Certification Signature Screen 16-20
Task F. Subsequent Certification – Health Information Screen 16-23
Task G. Subsequent Certification – Anthro/Lab Screen 16-29
Task H. Subsequent Certification – Eco-Social Assessment Screen 16-33
Task I. Subsequent Certification – Dietary & Health Screen 16-36
Task J. Subsequent Certification – Assigned Risk Factors Screen 16-39
Task K. Subsequent Certification – Certification Summary Screen 16-43

17- SCHEDULING SYSTEM 17-1

Scheduling System 17-1

Task A. Scheduling a Family Appointment 17-2
Task B. Rescheduling the Family Appointment 17-6
Task C. Canceling a Family Appointment 17-9

18- FOSTER CARE 18-1

Adding a Foster Family with Foster Children Only 18-1

Task A. Adding a New Foster Family Record (Foster Children Only) – Family Section 18-2
Task B. Adding a New Family Record – Participant Section 18-4
Task C. Completing the Income Information Screen 18-6
Task D. Completing the Certification for Each Foster Child 18-9
Task E. Issuing an Identification or EBT Card for Each Foster Child 18-10

Adding a Foster Infant/Child to a Non-foster Family 18-12

Task A. Adding a Foster Infant/Child to an Existing Non-foster Family 18-13
Task B. Adding a Foster Family Member – Participant Section 18-14
Task C. Complete the Income Information Screen 18-16
Task D. Issuing an Identification Card (or an EBT Card) 18-19
Task E. Completing the Certification for Each Foster Child 18-21
Task F. Issuing Benefits to a Foster Infant/Child 18-22

Documenting Foster Care for an Existing Infant or Child 18-24

Task A. Access (or Open) the Family Record 18-25
Task B. Voiding Future Benefits Prior to the Transfer 18-26
Task C. Transferring the Infant/Child Being Placed into Foster Care 18-29
Task D. Documenting Foster Care for the Infant/Child 18-30
Task E. Issuing an EBT Card to the Foster Infant/Child 18-32
Task F. Re-issuing Future Benefits to the Foster Infant/Child 18-33

19- MISCELLANEOUS TASKS 19-1

Issuing/Replacing an Identification Document 19-1

Task A. Issuing an Identification Document (for non-EBT States) 19-2

Task B. Replacing an Identification Document 19-4

Terminating and Reinstating Participants 19-6

Task A. Terminating a Participant 19-7

Task B. Reinstating a Participant 19-9

Using Peripheral Lab Equipment 19-11

Task A. Using a Doran Scale for Weighing Equipment 19-12

Task B. Using a Seca Combination Height and Weight Scale 19-14

Task C. Using a Health-O-Meter 600KL Physician Electronic Scale 19-16

Task D. Using Hemoglobin Equipment 19-18

20- PARTICIPANT PORTAL PROCESS 20-1

Verifying Potential Eligibility 20-1

Task A. Verify Potential Eligibility 20-2

Task B. Register Online 20-20

Task C. Completing the Family Information Screen 20-22

Task D. Clinic Selection 20-28

Task E. Health Information (Optional) 20-30

Task F. Appointment Scheduling 20-32

Task G. Accessing the Participant Portal with a registered User Name and Password. 20-36

Task H. Taking Online Classes 20-41

Task I. Registering as a WIC Participant 20-44

Task J. Cancel Family Appointments 20-48

Task K. Rescheduling Family Appointments 20-51

Task L. Resetting a Password 20-53

THIS PAGE INTENTIONALLY LEFT BLANK

1- OVERVIEW

This manual will aid WIC staff in learning about the function and use of the Clinic module (Applicant and Participant Services) of the Crossroads WIC System. The Clinic module (Applicant and Participant Services) is a comprehensive solution to help WIC staff manage family data and administer family benefits. The Crossroads WIC Application is family centric, which means that one record contains the entire family, thus enabling access to the woman and all her children. Major functions of this module include the following:

- **Family Search** – Used to access a list of applicant, participant, and family records in the system.
- **Family Record** – Used to store and access family information. A family record is created for each family unit and is used to store and maintain all information collected for the family and its members.
- **Breastfeeding Support** – Used to reserve, issue, and return breast pumps and breastfeeding supplies.
- **Care Plan** – Used to document family and member care plans.
- **Certification** – Used to certify applicants for participation in the WIC program.
- **Issue Benefits** – Used to prescribe food and issue/void benefits for family members.

State-Specific Functionality

The Crossroads WIC System requires some initial setup before you can use it. It is important to review state-specific features and functionality in each user manual's Overview, in the State-Specific Functionality section. **Note: Based on your state's configuration, some of the sample screens and instructions depicted in this document may vary.**

Manual Content

This manual includes the following components organized in the order indicated:

- **Table of Contents (TOC)** – Lists each documented training scenario included in this manual. The TOC is organized to complement the delivery of instructor-led, classroom training. Similar scenarios are grouped together by major system functions. Use the TOC to look up training scenarios first by function and then by scenario title.
- **Training Manual Overview** – Outlines the content of this manual and explains how this manual can be used. It includes information about the general structure of this manual and tips to help you get the most out of it.
- **Training Scenarios** – Covers situations that one might encounter in a typical day. Each scenario walks you through an entire process. Scenarios connect the individual tasks necessary to complete a process. The scenarios were written and organized to facilitate an instructor-led training session, but the scenarios can be used as reference guides after your training is complete.

Conventions and Features

This manual follows certain conventions that make it easy for you to use the materials presented and includes the following features that help you identify similar information from one topic to another:

- Training scenarios are grouped together by major system functions, so that you can locate the desired scenario more easily.

- Each training scenario begins with an Overview section that includes an explanation of what is covered within the scenario, so you will know from the start what you will be learning.
- Training scenarios are documented using Tasks and Steps. A Task is a major activity in a larger process and indicates a substantial portion of the overall process whereas a Step is one of several user actions within a Task.
- The manual provides Tasks and Steps for differing levels of detail. You can follow the list of Tasks (less detail) or you can go deeper and follow each Step of the process, click by click and action by action (more detail).
- Buttons you will need to click and data you will need to enter are accented in bold to help them stand out on the page, so that you can identify these items more easily.
- Pictures of application screens are included within each training scenario to help familiarize you with the screens. Data displayed in the pictures is intended for illustrative purposes only and does not represent live data. During classroom training, use the data supplied by the instructor. Outside of classroom training, enter the appropriate data as necessary to complete the task at hand.

Callout boxes help you find specific types of information quickly. The callout boxes are displayed and defined below.

Notes

The notepad-and-pencil icon displays to the left of paragraphs that provide additional, and usually more detailed, information about the application. Sometimes the notes give you additional information about the screen you are working with, and sometimes the notes inform you where to find additional information elsewhere. Either way, it is well worth your time to watch for these helpful icons.

Using This Manual

This manual can be used as a training manual during instructor-led, classroom training or as a reference guide once training is concluded. Use the table of contents (TOC) to locate a training scenario. Once you've located a specific training scenario, review the Overview section (at a minimum) to find out important details surrounding the scenario such as the starting point, type of data needed, and a summary of the Task(s) to be completed in the overall process. You can follow the associated Steps for more detail as needed.

State-specific Functionality

The Crossroads WIC System requires some initial setup before it can be used. Setup for the User Manual includes the following:

Overall

- **Application Expiration Days** – The number of days after which an incomplete application is removed from pending status. If no updates have been done in the specified number of days, the application is marked expired.
- **BioChemical Cut-Off Days** – The number of days submitted blood work is acceptable to be used for certification.
- **Anthropometric Cut-Off Days** – The number of days submitted anthropometric data is acceptable to be used for certification.

- **No of Days Before Re-Certification is Enabled** – The number of days prior to end of current certification a subsequent certification can be completed. Pertains only to infants and children.
- **Scales COM Port** – The dedicated Component Object Model (COM) port for Doran scales.
- **Weeks Gestation Full Term** – The minimum number of weeks gestation that is considered Full Term.
- **Weeks Gestation Pre-Term Cut-Off** – The maximum number of weeks Gestation that is considered Pre-Term.
- **SSN Visible** – Determines whether the Social Security Number field is displayed.
- **Allow Alternate Funding** – Determines whether alternate funding is available.
- **Certification Functions** – The order in which the steps are established at the state level.
- **Require Anthro When Not Present** – Determines whether Height/Weight measurements are required to complete a certification when the applicant is not physically present.
- **Require Biochemical** – Determines whether a bloodwork contact is required for every initial and subsequent certification.
- **Pending Proof of Pregnancy** – Determines whether or not a temporary certification can be done in the absence of a proof of pregnancy.
- **Require Head Circumference** – Determines whether the Infant/Child's Head Circumference field is displayed.
- **Require Bio When Not Present** – Determines whether bloodwork is required for a certification attempt when the applicant is not physically present.
- **Pending Proof of Identity** – Determines whether the Proof of Identification field is required.
- **Pending Proof of Residency** – Determines whether the Proof of Residency field is required.
- **Require Proof of Multiple Gestation** – Determines whether the Proof Of Multiple Gestations field is required each time a pregnant woman participant is certified with multiple numbers of embryos or fetuses in utero.
- **Pending Proof of Income** – Determines whether the Pending Proof of Income field is required. Determines if Crossroads allows temporary certification without proof of income.
- **Collect Lead Test** – Determines whether lead test blood work is displayed and required.
- **Require Employee Conflict of Interest** – Determines whether the Employee Conflict of Interest field is displayed and required.
- **Require Immunization Consent** – Determines whether immunization consent is displayed and required.
- **Require Source of Drinking Water** – Determines whether the Source of Drinking Water field is displayed and required.
- **Require Vendor Conflict of Interest** – Determines whether the Vendor Conflict of Interest field is displayed and required.
- **Required UpperCase** – Determines whether uppercase text is required.
- **Require Source of Information for WIC** – Determines whether the How you heard about WIC field is displayed and required.
- **Assign High Risks** – Determines whether high risk status is assigned based on high-risk thresholds.
- **2-20 Growth Charts** – Enable the "2-20 CDC growth charts".
- **Search for Active Records** – Enable the Active Only Family Search Option to search for currently certified participants only.
- **Alert Bloodwork is Due in #Days** – The number of days from the current date to use when creating a bloodwork due alert.

- **Enable Certify to the End of the Month** – Extends the certification end date to the end of the calendar month to support calendar month certifications. When set to “FALSE”, the certification end date is the rolling calendar month day with “FALSE” is the default setting. When set to “TRUE”, the certification end date extends to the end of the calendar month to support calendar month certifications, which may be necessary to support SAM project conversion and rollout.
- **No. of Days Before Re-Certification Is Enabled** – This is the number of days prior to the end of the current active certification period to allow the participant to begin a subsequent certification. This setting allows the state to configure when a subsequent certification can be started. It is used in combination with the certification extension to show the Extend Certification button.

Participant Portal

- **Max # of appointment cancellation allowed** – Determines how often the portal allows a family/participant to cancel an appointment. For more information, refer to the Scheduling Module DFDD.
- **Max # of appointment reschedule allowed** – Determines how often the portal allows a family/participant to reschedule an appointment. For more information, refer to the Scheduling Module DFDD.

Food

- **Suggest a Default Formula Amount to Infants** – Determines whether an amount of formula is suggested.
- **Food Instrument Expires After Days** – Number of days used when calculating expiration date of food instrument.
- **Farmers’ Market Issuance Method** – Option to use when issuing benefits for Farmers’ Market.
- **Banking Provider** – The banking provider.
- **Issuance Frequency** – Defines default frequency for food issuance.
- **Check Routing Number** – Routing number printed on the food instrument for WIC.
- **Check Account Number** – Account number printed as the checking account on the food instrument for WIC.
- **Can Issue from Formula Warehouse?** – Determines whether formula can be issued from a formula warehouse.
- **Default Medical Documentation Duration (in months)** – Used to calculate the end date on medical documentation screen.
- **Proration Unit Type** – Defines the proration for late pick-up or to synchronize the family issuance as either 1/3rd Proration or 1/4th Proration

EBT

- **Is EBT Enabled** – Controls whether a state has Electronic Benefits Transfer (EBT) set up for use, which determines whether issuances are via paper or an EBT account/card
- **Max Requested Count For Purchases** – The maximum number of results the EBT system may return from the Get Redemption Transaction History function.
- **Max Requested Count For EBT Card Details** – The maximum number of results the EBT system may return from the Get EBT Card History function.

EBT Card Validation

- **Number Length** – The number of digits for the card number.
- **Issuer Identification Numbers** – Must be a value between 0-999999.

Online EBT to MIS Interface

- **WIC EBT System ID** – Code used to identify EBT system in the Security Authorization Object portion of interfaces between Crossroads and the EBT provider system.
- **WIC MIS System ID** – Code used to identify the WIC Management Information System (MIS) system in the Security Authorization Object portion of interfaces between Crossroads and the EBT provider system.
- **Message Version** – Identifies the message definition version being used in the interfaces between Crossroads and the EBT provider system.
- **State FIPS Codes (EBT Only)** – Federal Information Processing Standard – State Code.
- EBT Authentication Timeout (in seconds) – Seconds that defines the time out period.

External Interfaces

- **Online Nutrition Education Link** – URL of the online Nutrition Education site.
- **PHALCON Integrated** – Only for Alabama for PHALCON interface.

THIS PAGE INTENTIONALLY LEFT BLANK

2- CROSSROADS OVERVIEW

Crossroads Overview, Logging In, and Navigation

The Crossroads WIC application is a browser-based, web application. Your system administrator supplies you with a link to access the application via your browser. Once the system administrator provides you with a link, you can create a desktop icon by dragging the link to it. Or, if you wish, simply add the link to your browser's favorites list.

This process includes the following task(s):

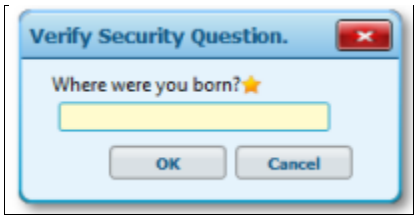
Task A. Logging into the Crossroads WIC Application 2-2

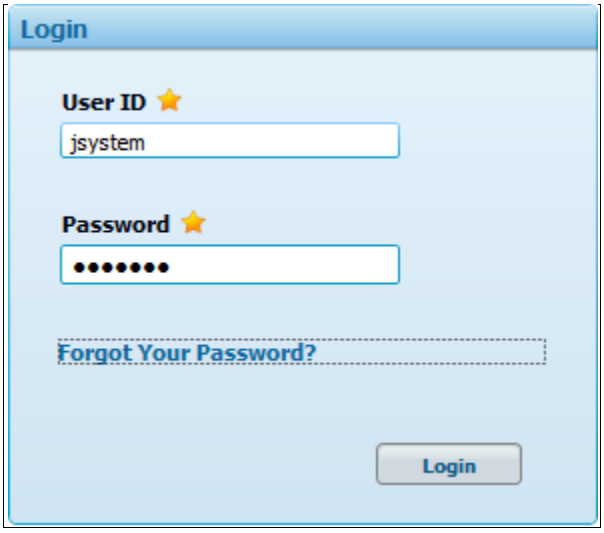
Task B. Navigating within the Crossroads Application 2-6

Task A. Logging into the Crossroads WIC Application

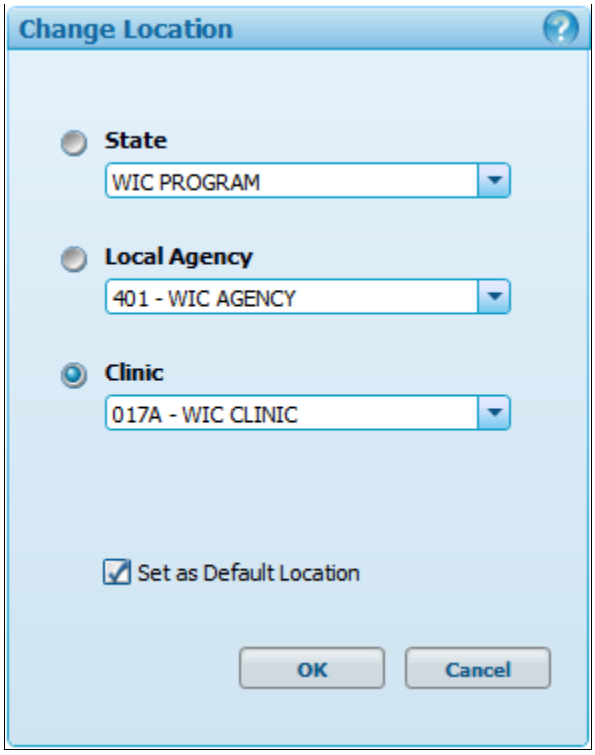
Complete the following steps to perform this task:

1. Click the **Crossroads WIC application** icon on your desktop or select it from your browser's favorites list. The **Login** screen displays.
2. Enter your **User ID** and **Password**.
3. If necessary, click **Forgot Your Password**. The system prompts you to answer security questions that were established when you were assigned a user ID and password.

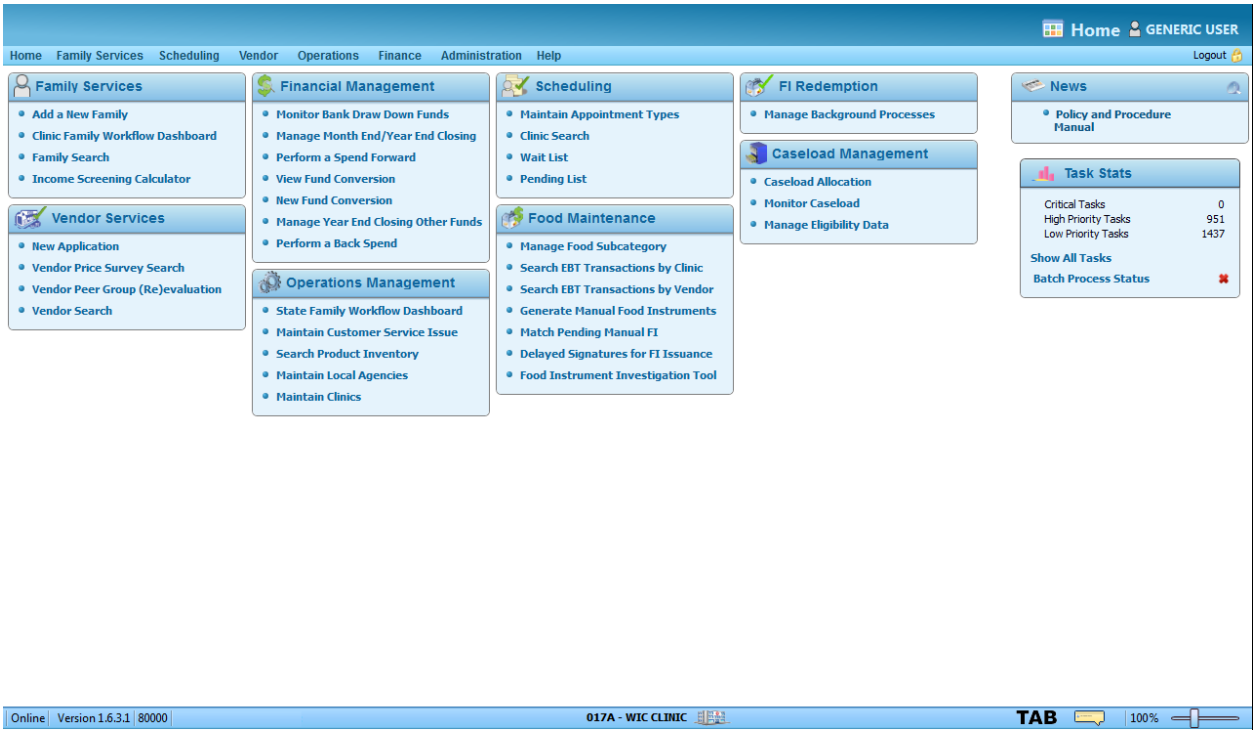




4. Click **Login**. The **Change Location** screen displays.



5. Select a **State**.
6. Select a **Local Agency**.
7. Select a **Clinic**.
8. Click the **Set as Default Location** check box to save your settings. The Default Location is the location that you log into when working in the system.
9. Click **OK**.
10. The Crossroad **Home** screen displays. Select the applicable module from the **Home** screen drop-down list box. Most commonly used modules appear as bulleted items.



The actual look and feel of the Home screen may differ depending on your system settings and administrative rights.

Tab Mode displays in the status bar (located at the bottom of the screen). The tabbing options are:

- TAB – **Standard Tab Mode** is the default tabbing order for advancing from field to field (from the top left field to bottom right).
- REQ – **Required Information Tab Mode** may be selected and enables you to tab only through the required fields, as indicated by the **Required Information** icon (★), while skipping over the non-required fields.
- ERR – **Error Tab Mode** may be selected and enables you to tab only through the fields highlighted in error while skipping over the fields passing edits.

News – News appropriate for the user role is displayed in the **News** section. The **High Priority** icon ( ) is displayed to indicate news items of high importance.

Task Stats – The most recent stats of system- or application-related tasks with respect to finance, customer service, and vendor roles are displayed in the current stats section.

Task B. Navigating within the Crossroads Application

When you successfully log on to the Crossroad system, you will first see the **Home** screen. The **Home** screen displays the modules within the system, along with their associated functions. The dashboard appearance will be configured based on your privileges set up by your system administrator.

Complete the following steps to perform this task:

1. Click an applicable function. The system displays that function's screen.

> Screens have input fields. You may TAB to the fields or use your mouse. Required fields are noted with the Required Information icon ( ).

The following buttons and icons appear throughout the application:

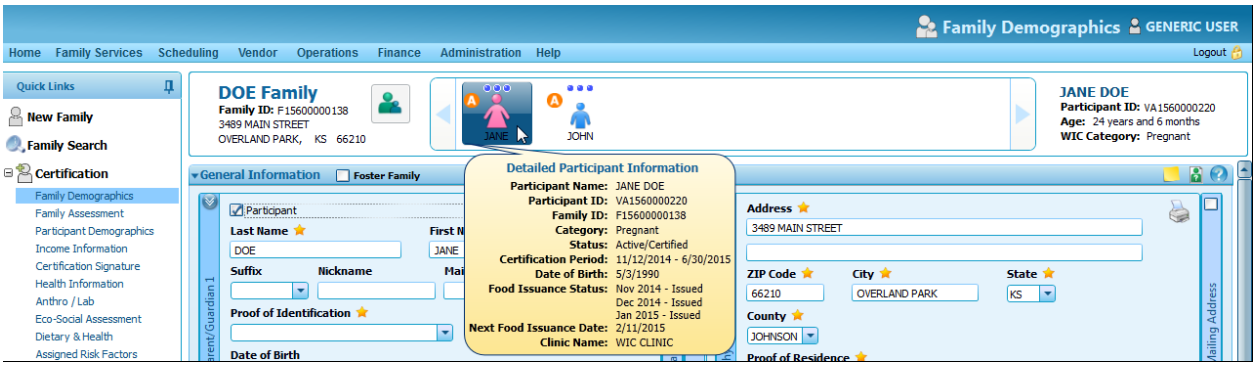
Buttons/Icons	Definition
	Processing icon (or spinner) displays when you are transitioning from one screen to another, or if you are performing saving or printing activities. Prolonged non-spinning may indicate a system-related issue.
	The Dirty Data Indicator identifies that data has been added or modified on the screen but has not been saved. It is displayed when data has been added or modified on the active screen but has not been saved. When displayed, it is positioned at the right end of the title bar above the Logged In User Indicator.
	The gold star icon indicates required information. On the **Certification Summary** screen, it indicates that the certification process is incomplete and requires additional information.
	Show-all button that displays additional fields within a given screen. Click this button to expand/collapse these fields.
	The edit button allows you to edit information within a field.
	The add button allows you to add information. This button changes to "edit" once the information is added.
	The delete button allows you to remove an individual field of information.
	The post-it note allows you to add free-form information to a screen.
	A post-it note with content.
	This button closes a popup screen.

	Click the magnifying glass to show additional information.
	During the certification process, a green check mark icon appears on the **Certification Summary** screen when the system deems the applicant eligible for that portion of the process.
	During the certification process, this icon appears on the **Certification Summary** screen to show that the item is optional.
	Calendar button displays current month. Within the calendar, you may toggle between months using the directional icons.
	Master Calendar icons: house: reload calendar; green arrows: refresh data; white arrow: return to previous screen
	Click this button to print the associated field.
	Click this button to search for a family.
	Infants -- boy and girl
	Children -- boy and girl
	Participant

Throughout the clinic module's many screens, family information is contained within the family header (or family pane).

The family header is an integral part of the Crossroads WIC application. Located at the top of the page, the header lists one woman participant (and categorizes her as a pregnant, breastfeeding or non-breastfeeding participant) and her children.

The Crossroads WIC application is family-centric, which means that one record contains the entire family, thus eliminating individual records for the woman and her children. Anywhere within the application, simply click on the icon to add, edit, or review information about the woman, child or infant. You can also view basic information about the participant by placing the cursor over the icon.



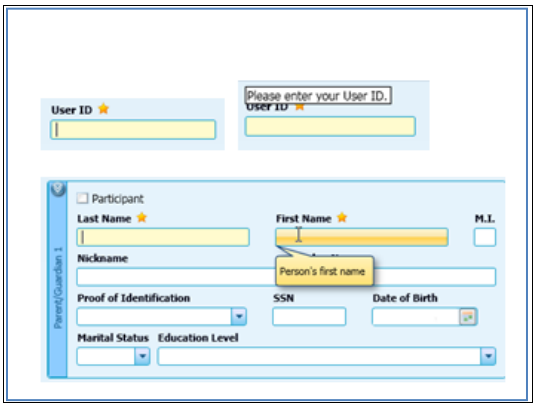
Information about each family member is represented by several icons that appear next to the image within the family header. These icons automatically change based on the status of each member.

Buttons/Icons	Definition
No Image	Applicant
	Expired; previously enrolled; not in current certification
	Active; enrolled; currently in valid certification period
	Terminated
	Foster Child
	Dirty Data Indicator; Page not saved
	On the Waiting List
	Deceased
	High Risk

The **Quick Links** navigation bar serves a dual purpose. It provides an alternate means to navigate through the family and client folders. It displays progress and ineligibility status during the certification

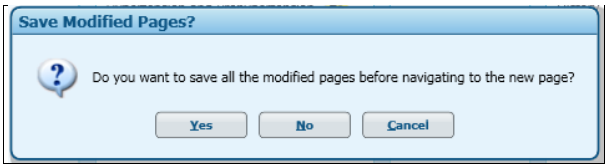
application processing. You may also choose to add a new family or search in addition to the view/update folder.

Hover over the text field with the mouse to display a brief description of information applicable for that field.

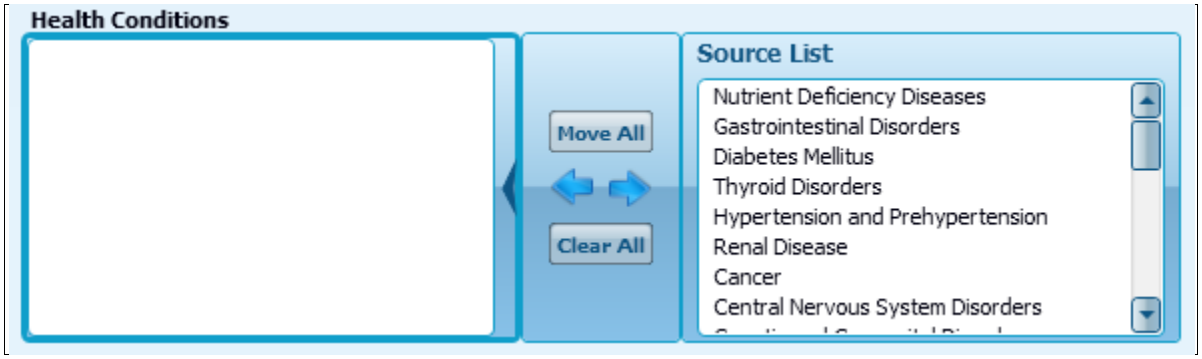


Informational status (or bubble messages are strategically displayed to notify you when information is successfully saved.

Confirmation messages are displayed to confirm a user action.



When open, the multi-select slider combines two multi-select list boxes, a "**Source List**" "destination list", and a set of buttons to manage the list options. Highlight items under the **Source List** and check **Move All**. **Move All** moves everything in the list. To move highlighted items, click the relevant arrow. The information you highlighted moves to the destination box. You may reverse this action or clear some or all the contents.



Congratulations!

You have successfully completed the **Crossroads Overview**, **Logging In**, **and Navigation** process.

3- NEW FAMILY

New Family

This scenario describes the process of adding a new family record to the system. Assume that you are beginning this process from the **Home** screen and that you have already a completed statewide search to ensure a record does not exist. For training purposes, you will add a family record consisting of a pregnant woman and her two-year-old child that does not include any foster children.

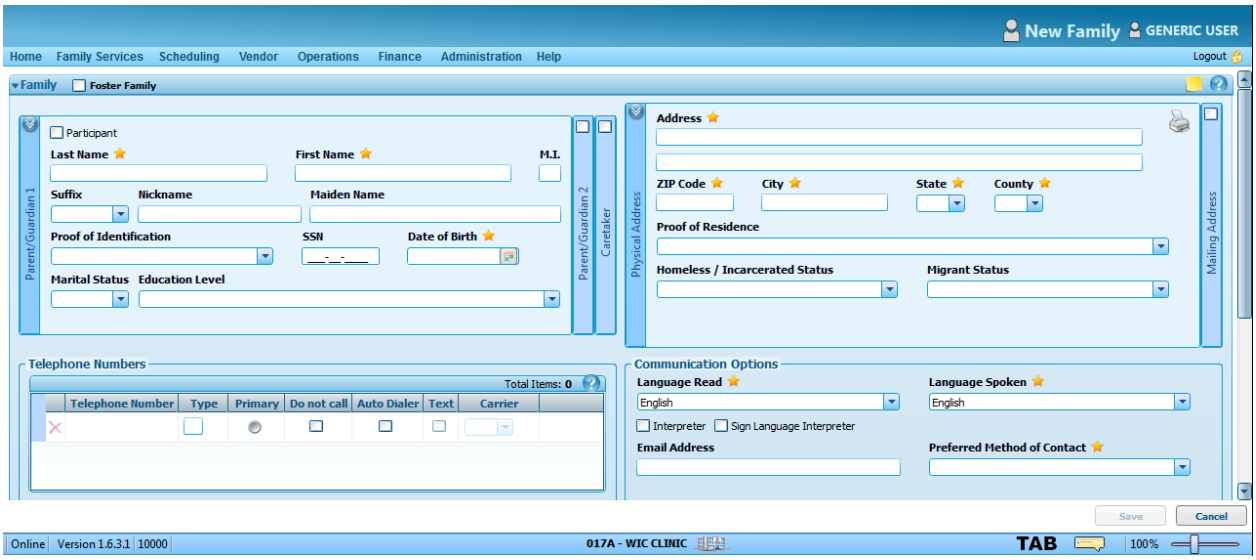
This process includes the following task(s):

Task A. Adding a New Family Record – Family Section **3-2**
Task B. Adding a New Family Record – Participant Section **3-10**

Task A. Adding a New Family Record – Family Section

Complete the following steps to perform this task:

1. Go to **Family Services → New Family**. The **New Family** screen displays.



The New Family screen enables you to add a family record consisting of one or more family members. The screen is divided into two major sections: Family and Add Participant. Under the Family section, you will enter information for the Parent/Guardian(s) and other basic demographic information associated with the entire family such as their address and contact information. The Add Participant section is used to add records onto the system for each family member you intend to certify.

2. Do not select the **Foster Family** check box.

Select the Foster Family check box to indicate that the family will consist of foster children only. For more information, consult the Adding a Foster Family with Foster Children only scenario.

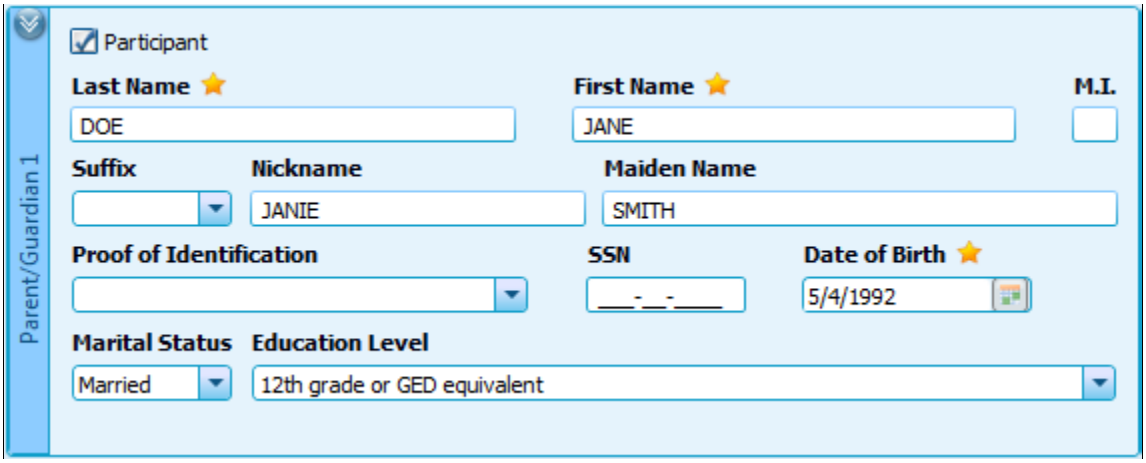
3. If the Parent/Guardian1 intends to participate in WIC, check the **Participant** check box.

Selecting the Participant check box indicates that the Parent/Guardian 1 intends to participate in the WIC program. For this scenario, the woman is pregnant and plans to participate. This check box would be marked as well if the woman was Breastfeeding or Non-breastfeeding and she planned to participate.

When the Participant check box is selected, certain information entered into the Parent/Guardian 1 container like the First and Last name and the Date of Birth (DOB) is copied into the Participant section of the screen automatically to minimize the need for the user to enter the same information twice. For more information, consult Task B of this scenario.

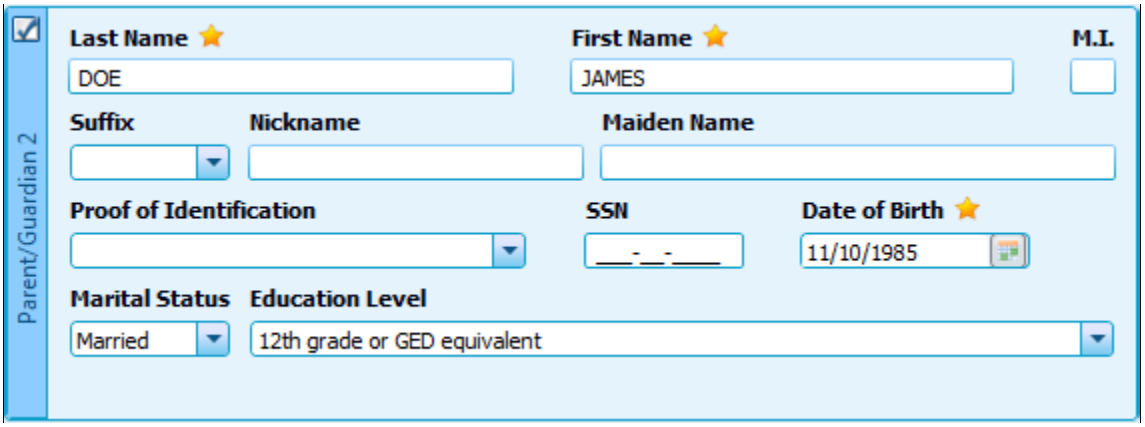
4. Complete the **Parent/Guardian1** sub-tab.

- Last Name
- First Name
- Middle Initial (M.I.)
- Suffix
- Nickname
- Maiden Name
- Proof of Identification
- SSN
- Date of Birth
- Marital Status
- Education Level



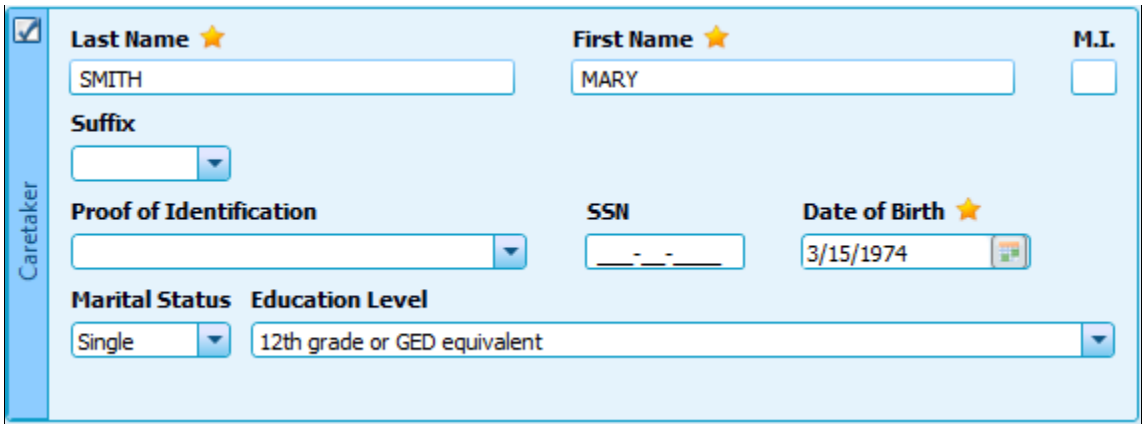
5. Complete the **Parent/Guardian2** sub-tab, if necessary, by first clicking the associated check box.

- **Last Name**
- **First Name**
- **Middle Initial (M.I.)**
- **Suffix**
- **Nickname**
- **Maiden Name**
- **Proof of Identification**
- **SSN**
- **Date of Birth**
- **Marital Status**
- **Education Level**



The fields in the Parent/Guardian 2 sub-tab are disabled until the check box is selected. Use this sub-tab to document the family's second parent or guardian.

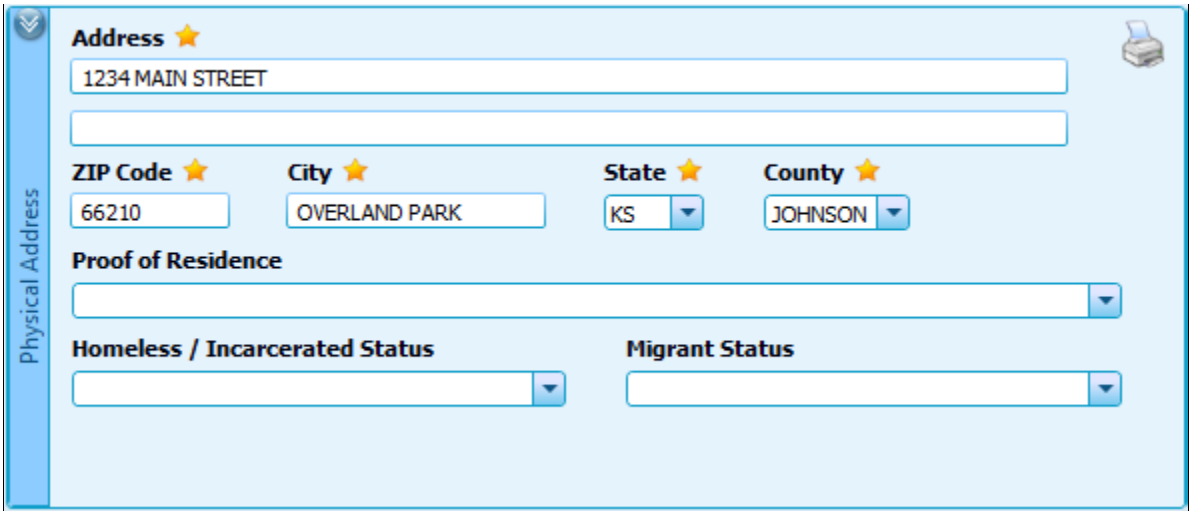
6. Complete the **Caretaker** sub-tab, if necessary, by first clicking the associated check box.
   - **Last Name**
   - **First Name**
   - **Middle Initial (M.I.)**
   - **Suffix**
   - **Nickname**
   - **Maiden Name**
   - **Proof of Identification**
   - **SSN**
   - **Date of Birth**
   - **Marital Status**



The fields in the Caretaker sub-tab are disabled until the check box is selected. Not every family has a caretaker. A caretaker is designated by a parent or legal guardian to serve as an alternate to accompany children during certification attempts, to receive and share nutrition education, and to redeem WIC benefits for the parent or legal guardian.

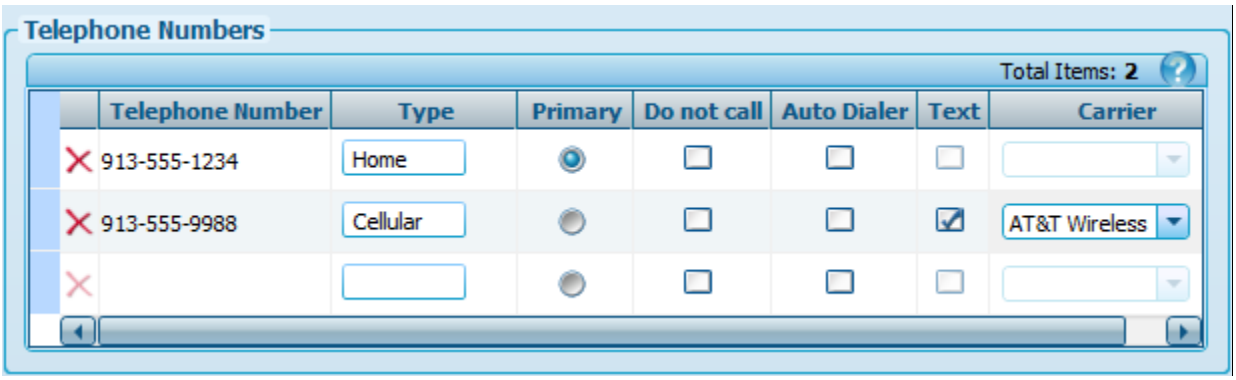
7. Complete the **Physical Address** sub-tab. Enter the following:
   - **Address**
   - **ZIP Code**
   - **City**
   - **State**
   - **County**
   - **Proof of Residence**
   - **Homeless/Incarcerated Status**
   - **Migrant Status**

8. Complete the **Mailing Address** sub-tab (if necessary). Enter the following:
   - **Address**
   - **ZIP Code**
   - **City**
   - **State**
   - **County**



It is not necessary to complete the Mailing Address sub-tab if the physical address and the mailing address of the family are identical. If a mailing address is not entered into the system the system uses the physical address as the mailing address when needed. For example, if no mailing address has been entered into the system and a notification (letter) is to be mailed to the participant, the system uses the physical address information to complete the notification.

9. Complete the **Telephone Numbers** group box. Enter the following:
   - **Telephone Number**
   - **Type**
   - **Primary**
   - **Do no call** (if necessary)
   - **Auto-dialer** (if necessary)
   - **Text** (if necessary)
   - **Carrier** (if necessary)



Multiple numbers can be documented, but one Primary Telephone number is required if Telephone is selected as the Preferred Method of Contact.

Check Do not call if the family does not want to be called. This cannot be selected if Telephone is selected as the Preferred Method of Contact.

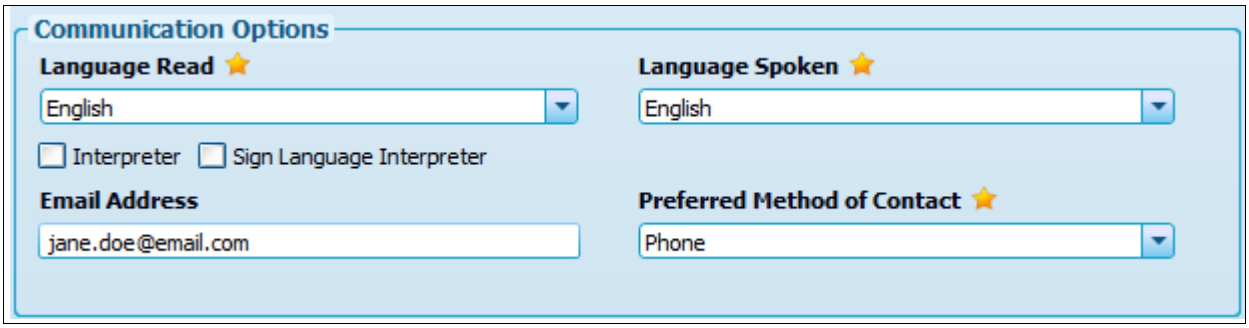
Check Auto dialer if the family wants to receive auto dialed messages.

Check Text if the family wants to receive text messages. The system must be configured for auto dialer and text messaging.

Carrier is disabled unless Cell is selected as the Type of Telephone Number. If Cell is selected as the Type, then the Carrier must be selected as well.

10. Complete the **Communications Options** group box.

- **Language Read**
- **Language Spoken**
- **Interpreter**
- **Sign Language Interpreter**
- **Email Address**
- **Preferred Method of Contact**



The option selected for the Preferred Method of Contact determines the way in which the family wants to be contacted. Depending on the option selected, the associated information becomes required. For example, if Telephone is selected as the Preferred Method of Contact, then it is required that a telephone number is documented.

At this point, you are ready to begin completing the **Add Participant** section of the screen. Notice that the system copies certain information into this section since you selected the **Participant** check box within the **Family** section.

New Family GENERIC USER

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Parent/Guardian 1

Suffix | Nickname: JANIE | Maiden Name: SMITH

Proof of Identification | SSN: __-__-___ | Date of Birth: 5/4/1992

Marital Status: Married | Education Level: 12th grade or GED equivalent

Parent/Guardian 2 | Caretaker

Physical Address

ZIP Code: 66210 | City: OVERLAND PARK | State: KS | County: JOHNSON

Proof of Residence

Homeless / Incarcerated Status | Migrant Status

Mailing Address

Telephone Numbers — Total Items: 2

Telephone Number	Type	Primary	Do not call	Auto Dialer	Text	Carrier
913-555-1234	Home	●	☐	☐	☐	
913-555-9988	Cellular	○	☐	☐	☑	AT&T Wireless
		○	☐	☐	☐	

Communication Options

Language Read: English | Language Spoken: English

☐ Interpreter ☐ Sign Language Interpreter

Email Address | Preferred Method of Contact: Mail

Add Participant

Last Name: DOE | First Name: JANE | M.I. | Suffix | Date of Birth: 5/4/1992 | SSN: __-__-___

Proof of Identification | Category | Add | Clear

Participant List — Total Items: 0

Last Name	First Name	M.I.	Suffix	Date of Birth	Category	Gender	Foster Care Entry Date

Save Cancel

Online | Version 1.6.3.1 | 10000 | 017A - WIC CLINIC | TAB | 100%

Task B. Adding a New Family Record – Participant Section

Complete the following steps to perform this task:

1. Complete the **Add Participant** section for the woman by doing the following:

> The system copied the information entered in the Parent/Guardian 1 section automatically because the Participant check box was selected.

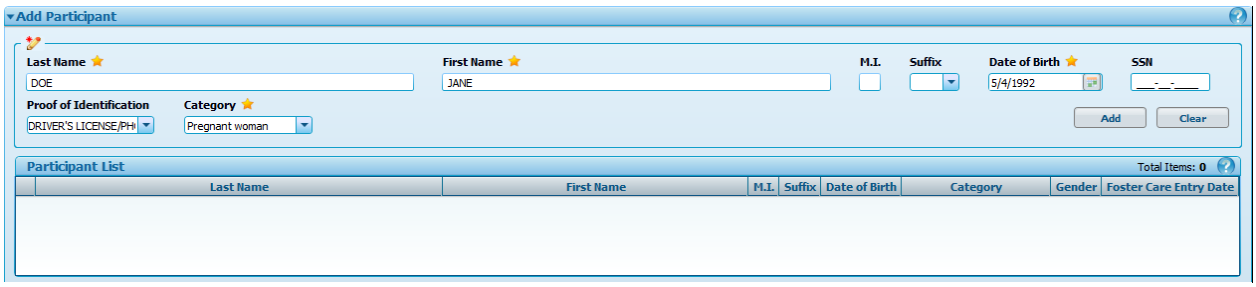
   a. Enter a **Middle Initial**, if necessary.

   b. Enter a **Suffix**, if necessary.

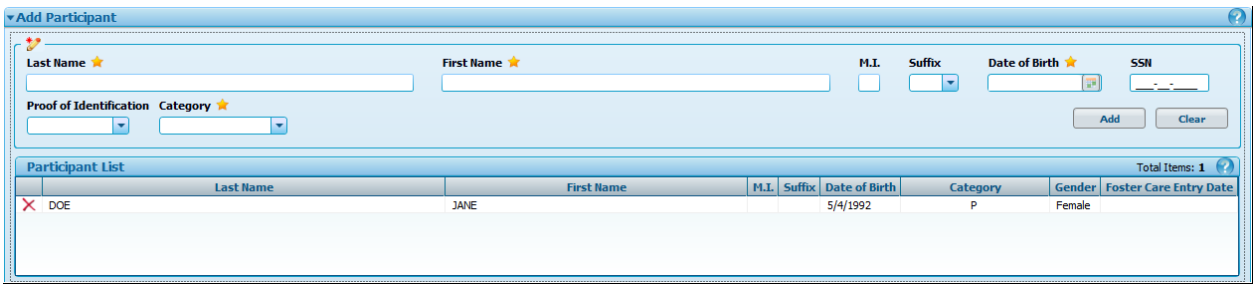
   c. Enter a **Social Security Number**, if necessary.

   d. Enter **Proof of Identification**.

   e. Select the (WIC) **Category**.

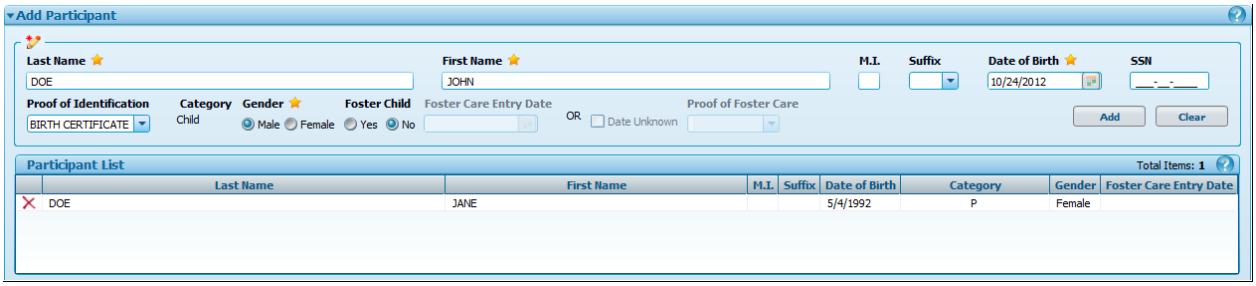


2. Click **Add** to add the woman's name to the **Participant List** grid. The grid refreshes and displays the woman's information.

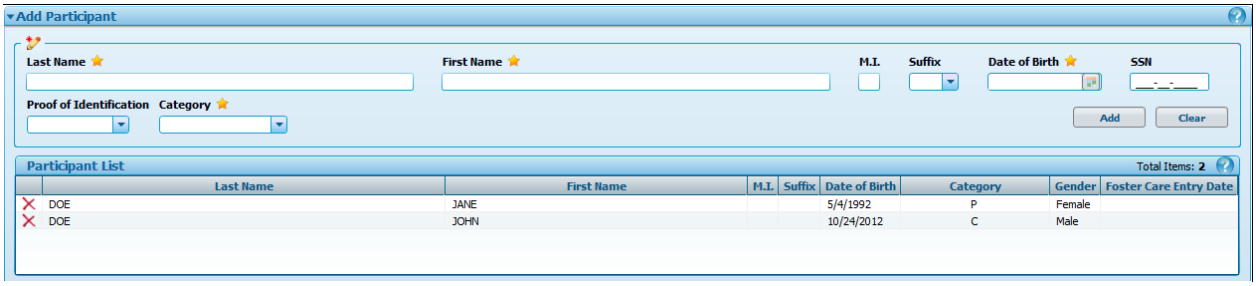


> Once Add is clicked, the information is added to the Participant List grid and the fields in the Add Participant section are cleared so that another family member's information can be added (if necessary).

3. Complete the **Add Participant** section of the screen for the child by doing the following:
   a. Enter the **Last Name**.
   b. Enter the **First Name**.
   c. Enter a **Middle Initial**, if necessary.
   d. Enter a **Suffix**, if necessary.
   e. Enter a **Social Security Number**, if necessary.
   f. Enter **Proof of Identification**.
   g. Select the **Gender**.
   h. Select **Foster Child**, if applicable.
      i. If **Foster Child** is selected, enter the **Foster Care Entry Date**.
      ii. If **Foster Child** is selected, select the **Proof of Foster Care**.

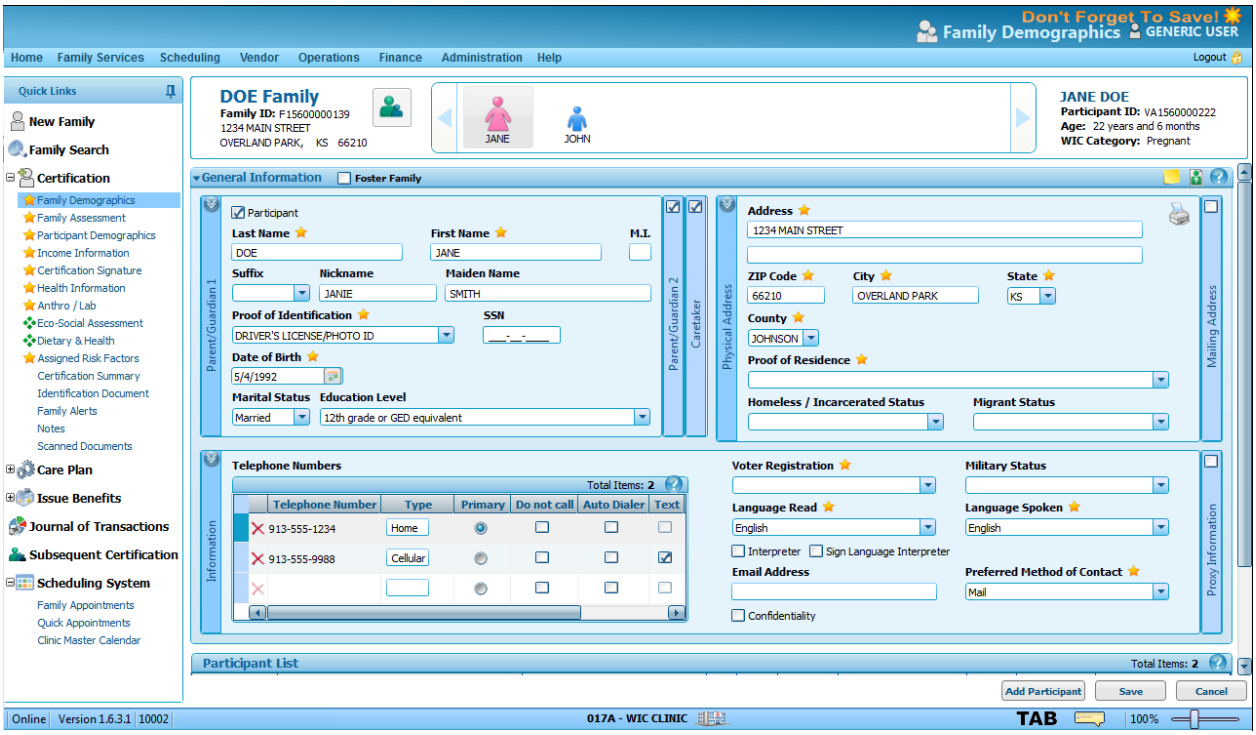


4. Click **Add**. The child's information is added to the **Participant List** grid. The grid refreshes and displays the child's name.



Outside of formal training, add a row to the grid for each family member applying for WIC benefits.

5. Click **Save**. The family record (consisting of a woman and her child) is added to the system. The **Family Demographics** screen displays.



At this point in the process:

The family record has been established in the system.

Each family member displays as an icon within the Family Header and the woman's icon is initially selected.

The system assigns a unique Family ID that is applicable to the entire family and a unique Participant ID for each member of the family.

The clinic selected during the log in process is assigned to the family.

If the system is configured for Electronic Benefit Transfer (EBT), an Electronic Benefit Account (EBA) is added automatically within the EBT provider system when a new record is added to the Crossroads system.

It is important to verify that the EBA was created. It is recommended that the verification occur immediately after adding the family record to the system.

To verify the EBA was created, select the EBT Activity History link within the Quick Links container. On the EBT Activity History screen, under the Successful column, verify that Yes displays next to the Create EBA (or Update EBA) grid entry. Yes indicates that the EBA was created successfully in the EBT provider system. If No displays, click the reprocess button (✖) to manually reprocess the request to create the EBA. (The system attempts to reprocess the request automatically every so often based upon a configurable setting, but clicking the button reprocesses the request immediately.) If No displays still after clicking the reprocess button, contact the Help Desk for further guidance.

After a family has been added to the system, new members are added to the family by clicking the Add Participant button on the Family Demographics screen. For more information, consult the Adding a New Member to an Existing Family scenario.

Congratulations!

You have successfully completed the **New Family** process.

THIS PAGE INTENTIONALLY LEFT BLANK

4- FAMILY SEARCH

Family Search

This scenario focuses on how to search and access family records. Assume you have logged into the system and are starting from the **Home** screen.

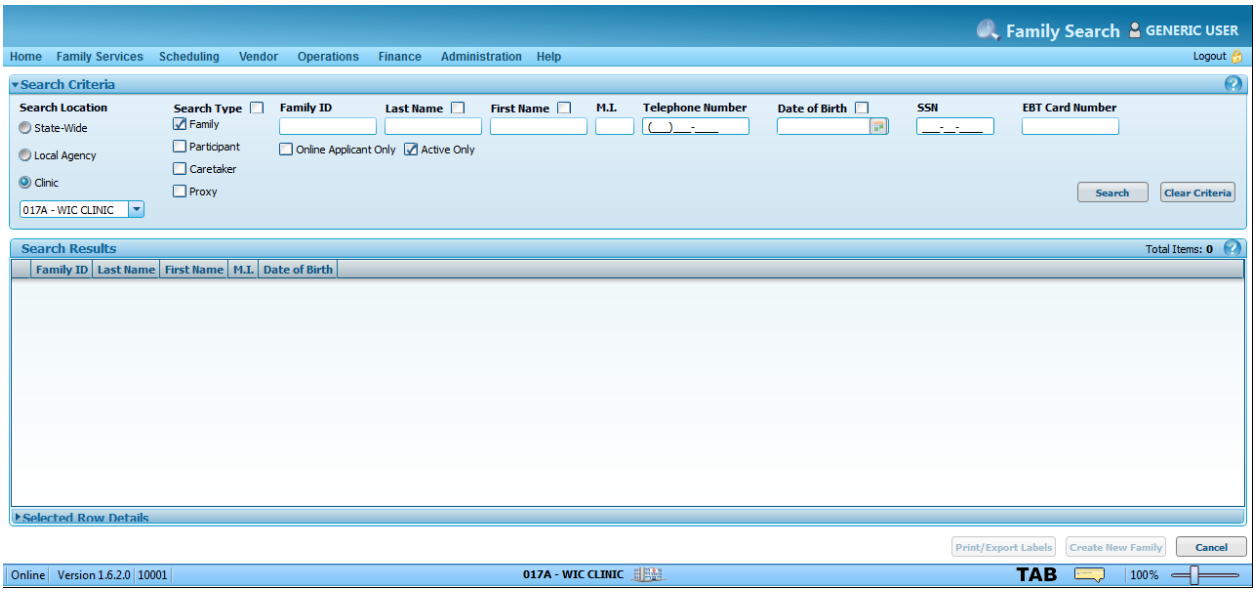
This process includes the following task(s):

Task A. Conducting a Search and Accessing a Family Record 4-2
Task A. Adding a Member Record to an Existing Family 4-7

Task A. Conducting a Search and Accessing a Family Record

Complete the following steps to perform this task:

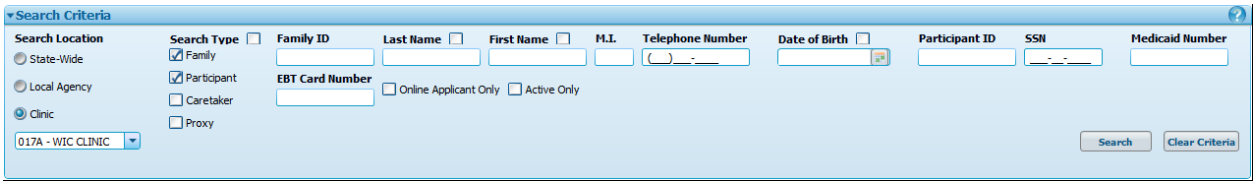
1. Go to **Family Services → Family Search**. The **Family Search** screen displays.



2. Under **Search Criteria**, select the desired **Search Location**.

> Search Location can be refined by using the set of radio buttons (Statewide, Local Agency, or Clinic) and the associated drop-down list box.

3. Under **Search Type**, check one or more check boxes.

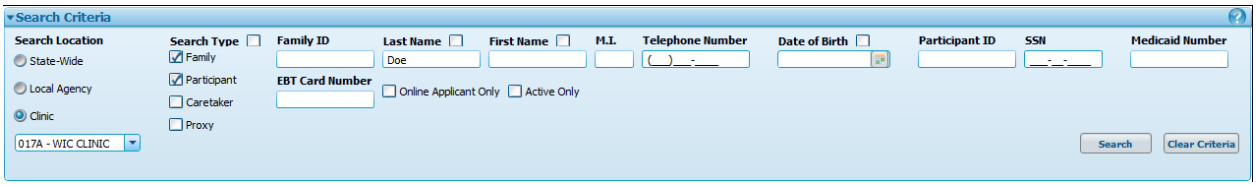


> Search Type can be refined by using the set of checkboxes (Family, Participant, Caretaker, or Proxy). The number of Search Criteria fields, which display is dependent on which Search Type(s) is selected.
>
> Selecting Family returns search results displaying information documented in the Parent/Guardian 1 and 2 sub-tabs.
>
> Selecting Participant returns search results displaying information related to individual participant(s).
>
> Selecting Caretaker returns search results displaying information documented in the Caretaker

sub-tab.

Selecting Proxy returns search results displaying information documented in the Proxy 1 and 2 sub-tabs.

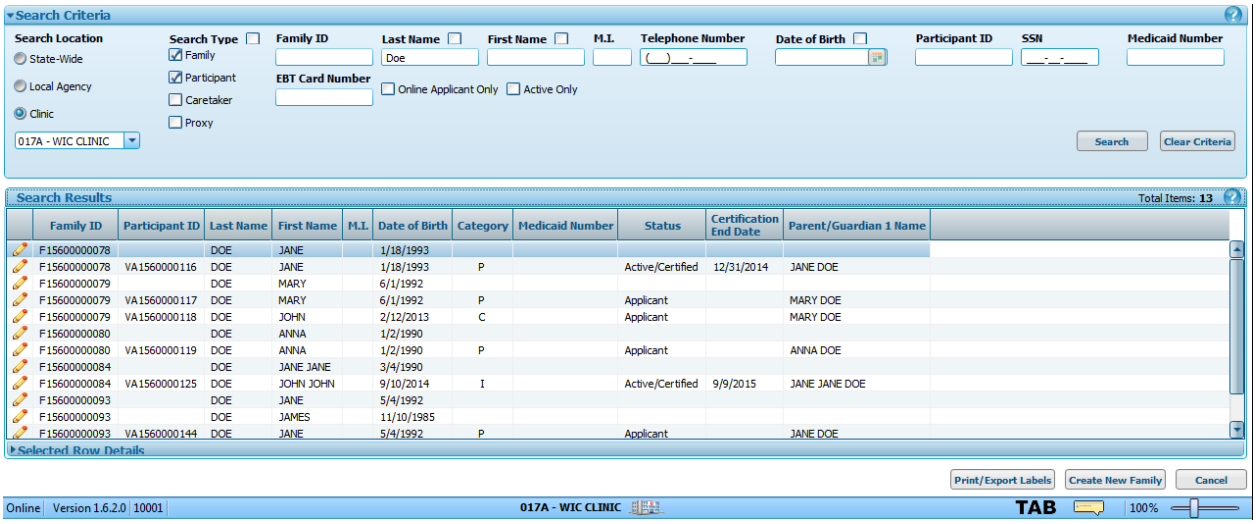
4. Enter or select the desired search criteria.



Selecting Online Applicant Only returns results for records entered online by applicants only.

Selecting Active only limits search results to records in an Active (certified) status.

5. Click **Search**. The screen refreshes and displays the results of the search in the **Search Results** grid.



Click a column header to sort the results of the search. In the example below, the First Name column has been selected.

Search Results

	Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Category	Medicaid Number	Status	Certification End Date	Parent/Guardian 1 Name
	F15600000080		DOE	ANNA		1/2/1990					
	F15600000080	VA1560000119	DOE	ANNA		1/2/1990	P		Applicant		ANNA DOE
	F15600000093		DOE	JAMES		11/10/1985					
	F15600000093	VA1560000144	DOE	JANE		5/4/1992	P		Applicant		JANE DOE
	F15600000078		DOE	JANE		1/18/1993					
	F15600000093		DOE	JANE		5/4/1992					
	F15600000078	VA1560000116	DOE	JANE		1/18/1993	P		Active/Certified	12/31/2014	JANE DOE
	F15600000084		DOE	JANE JANE		3/4/1990					
	F15600000079	VA1560000118	DOE	JOHN		2/12/2013	C		Applicant		MARY DOE
	F15600000084	VA1560000125	DOE	JOHN JOHN		9/10/2014	I		Active/Certified	9/9/2015	JANE JANE DOE
	F15600000093	VA1560000145	DOE	JONATHAN		11/15/2009	C		Applicant		JANE DOE
	F15600000079	VA1560000117	DOE	MARY		6/1/1992	P		Applicant		MARY DOE

Selected Row Details

Click and hold, then drag and drop a column of information to reorganize the order of the columns in the grid. In the example below, the Participant ID column is being moved (dragged and dropped).

Search Results — Total Items: 14

	Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Category	Medicaid Number	Status	Certification End Date	Parent/Guardian 1 Name	Participant ID
	F15600000078		DOE	JANE		1/18/1993						
	F15600000078	VA1560000116	DOE	JANE		1/18/1993	P		Active/Certified	12/31/2014	JANE DOE	
	F15600000078	VA1560000146	DOE	JOHN		3/15/2012	C		Active/Certified	1/31/2015	JANE DOE	
	F15600000079		DOE	MARY		6/1/1992						

Select a row in the grid and click Selected Row Details to view detailed information about the selected record including Family Issuance Day, Next Pickup Date, and Appointment information.

Individually scheduled appointments such as Certification, Subsequent Certification, Nutrition Education/Individual, and Follow up appointments display in the Selected Row Details container. Group education scheduled appointments such as Five-A-Day Fruit and Vegetable group class appointments do not display in this container.

To view all scheduled appointments for a family (or individual family member), access (or open) the family record. Once the record is open, navigate to the Family Appointments screen (click the Family Appointments Quick Link). The Family Appointments screen displays all scheduled family appointments regardless of type. To learn how to open a record, continue reading this scenario.

Search Results — Total Items: 25

	Family ID	Participant ID	Last Name	First Name	M.I.	Date of Birth	Category	Medicaid Number	Status	Certification End Date	Parent/Guardian 1 Name
	F01100000021	WV0110000038	DOE	JANE		5/3/1990	P		Certification Expired	4/23/2015	JANE DOE
	F01100000022	WV0110000040	DOE	JANE		5/3/1990	P		Certification Expired	4/23/2015	JANE DOE
	F01100000022	WV0110000041	DOE	JOHN		4/2/2011	C		Certification Expired	3/31/2015	JANE DOE
	F01100000023	WV0110000039	DOE	JOHN		4/2/2011	C		Certification Expired	3/31/2015	JANE DOE
	F01100000023	WV0110000042	DOE	JANE		8/9/1990	P		Certification Expired	4/30/2015	JANE DOE
	F01100000023	WV0110000043	DOE	JOE		3/3/2011	C		Certification Expired	3/31/2015	JANE DOE
	F01100000024	WV0110000045	DOE	JANE		8/9/1990	P		Certification Expired	4/30/2015	JANE DOE
	F01100000024	WV0110000046	DOE	JOHN		3/3/2011	C		Certification Expired	3/31/2015	JANE DOE
	F01100000025	WV0110000048	DOE	JANE		8/9/1990	P		Certification Expired	4/30/2015	JANE DOE
	F01100000025	WV0110000049	DOE	JOHN		3/3/2011	C		Certification Expired	3/31/2015	JANE DOE
	F01100000026	WV0110000035	DOE	JOHN		4/2/2011	C		Certification Expired	3/31/2015	JEREMIAH SMITH
	F01100000027	WV0110000051	DOE	MATTHEW		9/17/2010	C		Application Expired		JEREMIAH SMITH
	F01100000028	WV0110000052	DOE	JOHN		9/10/2011	C		Certification Expired	3/31/2015	JANE DOE
	F01100000028	WV0110000053	DOE	JANE		3/3/1990	P		Certification Expired	3/31/2015	JANE DOE
	F01100000029	WV0110000037	DOE	JOHN		4/2/2011	C		Certification Expired	3/31/2015	MARY SMITH
	F05500004822	WV0550009295	DOE	JANE		7/5/1990	P		Certification Expired	3/31/2015	JANE DOE
	F05500004822	WV0550009296	DOE	JOHN		11/15/2012	C		Certification Expired	3/31/2015	JANE DOE

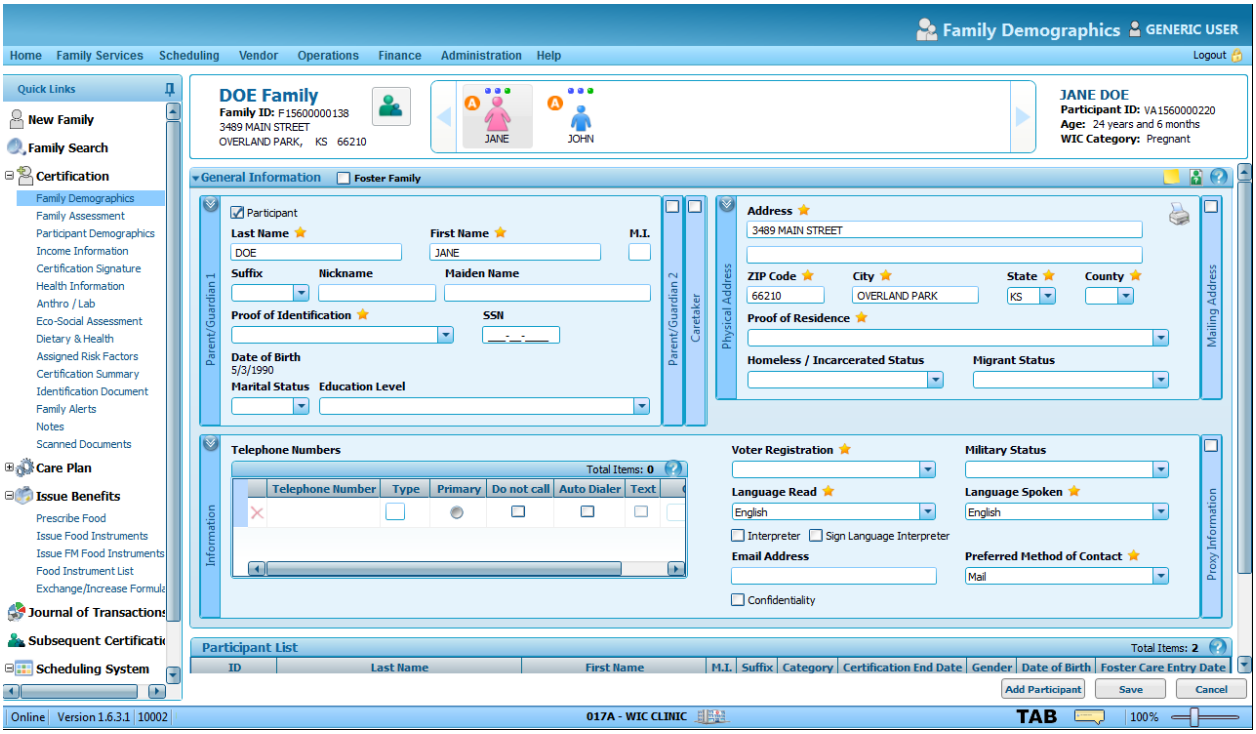
Name	Mailing Address	Parent/Guardian1	Caretaker	Family Issuance Day
JANE DOE	1234 MAIN STREET, OVERLAND PARK, KS 66210	JANE DOE		14th
SSN	**Telephone Numbers**	**Parent/Guardian2**		**Next Pickup Date**
				2/14/2015

Family Members
P JANE DOE
C JOHN DOE

Appointments

Selected Row Details

6. Click the **Edit** button ( ) to access the family record. The **Family Demographics** screen displays.



If the family belongs to a clinic other than the clinic you are currently logged into, that family's record opens in read-only mode. Read-only mode enables the record to be viewed, but all controls are disabled and no actions can be taken.

Congratulations!

You have successfully completed the **Family Search** process.

Adding a New Member to an Existing Family

This scenario describes the process of adding a member to an existing family record. Assume you have already logged into the system and are starting from the **Home** screen.

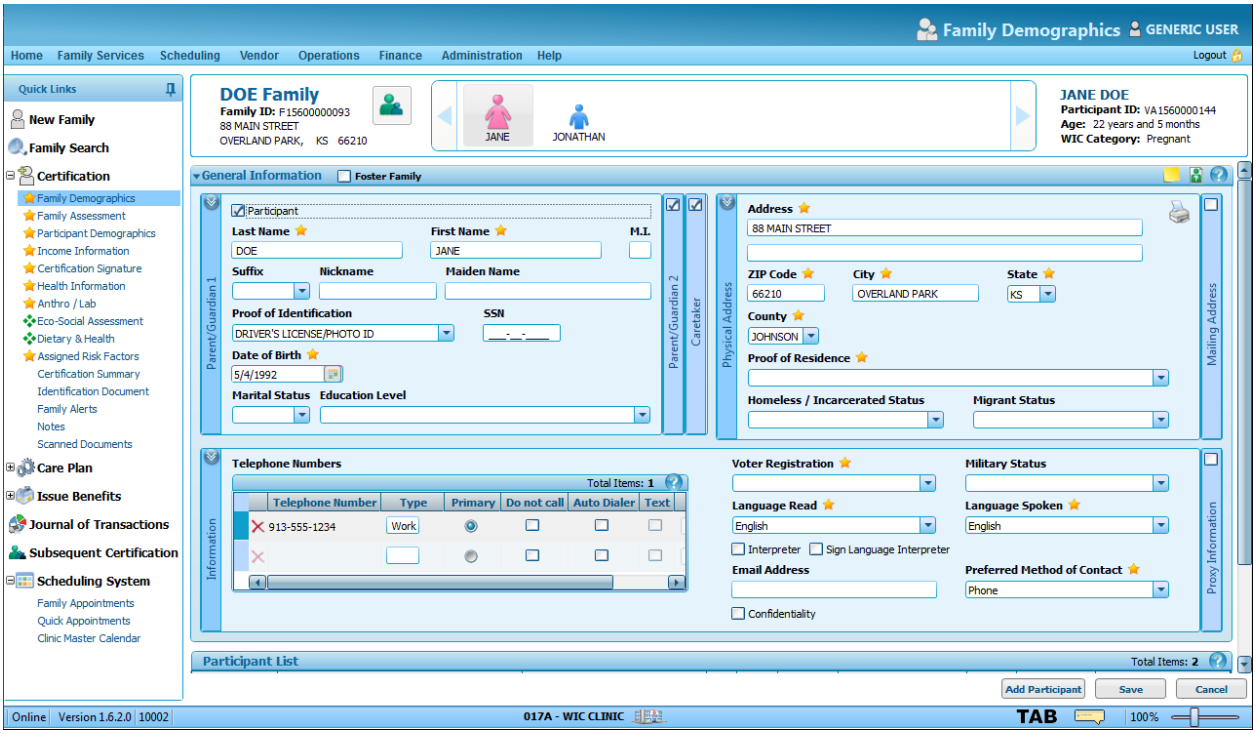
This process includes the following task(s):

Task A. Adding a Member Record to an Existing Family 4-7

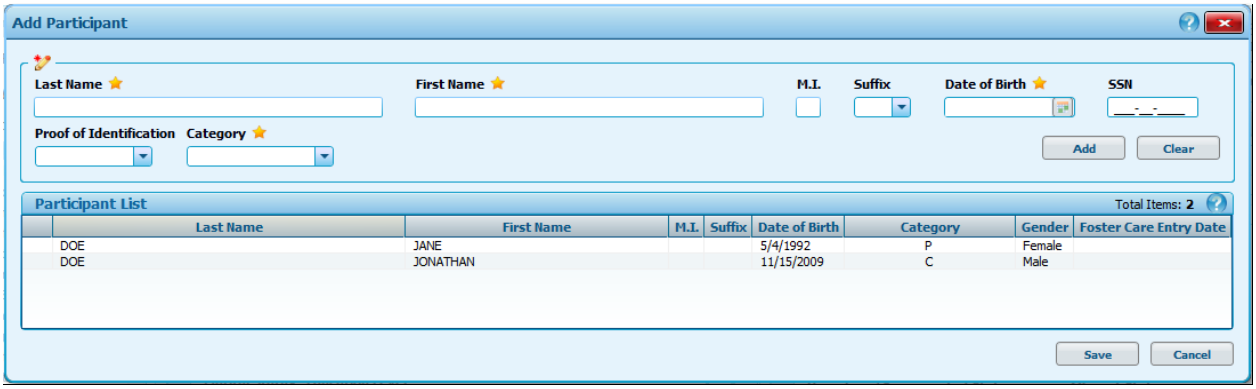
Task A. Adding a Member Record to an Existing Family

Complete the following steps to perform this task:

1. Search for and access (open) the desired family record. The **Family Demographics** screen displays.



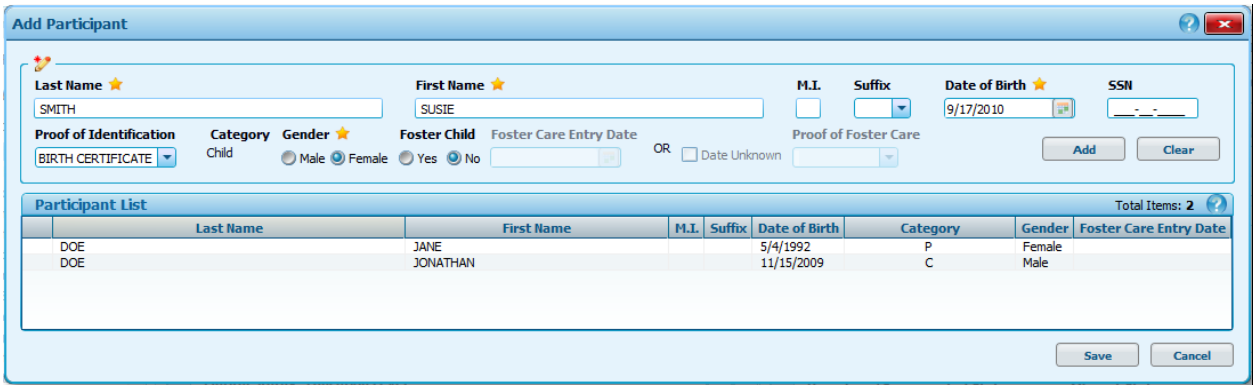
2. Click **Add Participant** to add a new member record. The **Add Participant** screen displays.



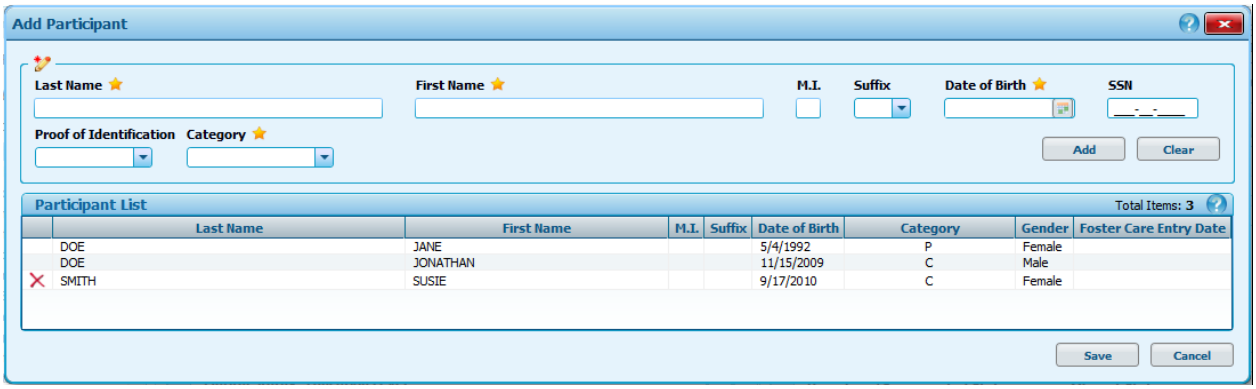
The Add Participant screen is the second section of the New Family screen. It is used when a new family is added to the system and when a new member is added to an existing family record.

Upon initial display, the current members of the family display in the Participant List grid.

3. Complete the **Add Participant** screen for the member being added by doing the following:
   a. Enter the **Last Name**.
   b. Enter the **First Name**.
   c. Enter a **Middle Initial**, if necessary.
   d. Enter **Date of Birth**.
   e. Enter a **Suffix**, if necessary.
   f. Enter a **Social Security Number**, if necessary.
   g. Enter **Proof of Identification**.
   h. Select the **Gender**.
   i. Select **Foster Child**, if applicable.
      i. If **Foster Child** is selected, enter the **Foster Care Entry Date or Date Unknown**.
      ii. If **Foster Child** is selected, select the **Proof of Foster Care**.

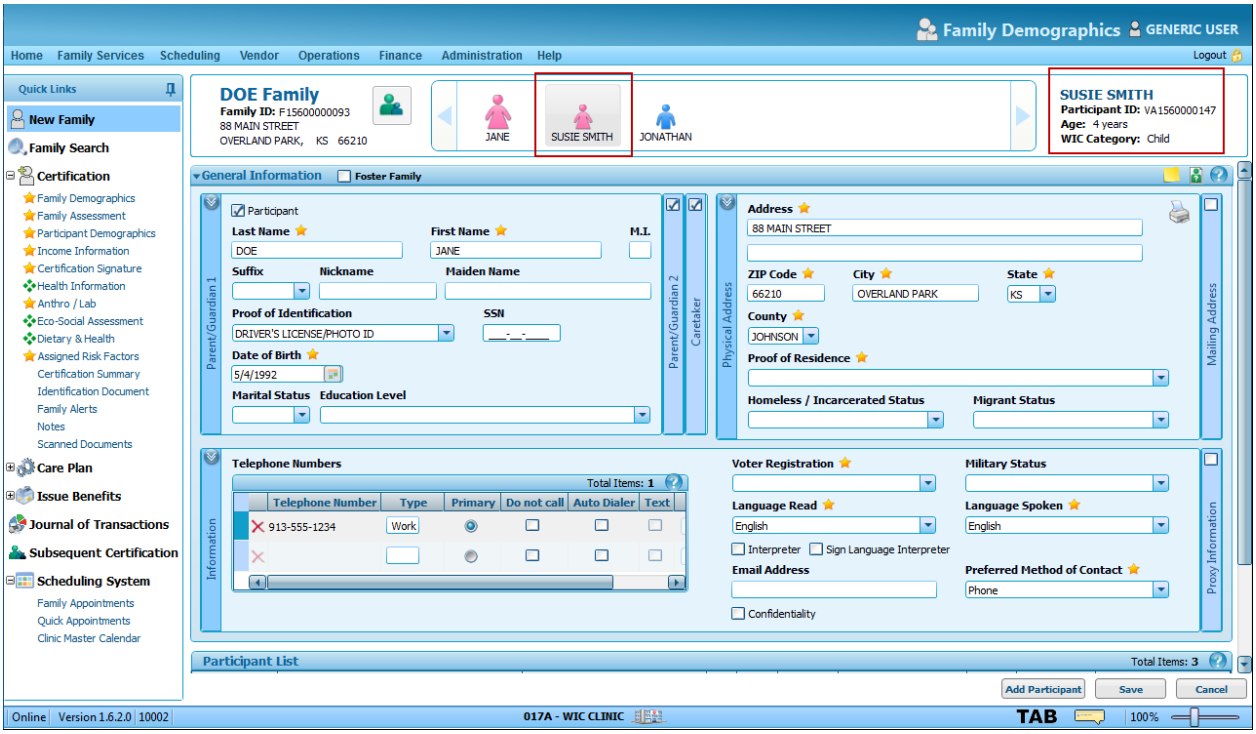


4. Click **Add** to add the new member's name to the **Participant List** grid. The grid refreshes and displays the new member's name.



Click the **Delete** button (✕) to remove the newly added member from the Participant List grid.

5. Click **Save** to refresh the **Add Participant** screen. The **Family Demographics** screen displays.

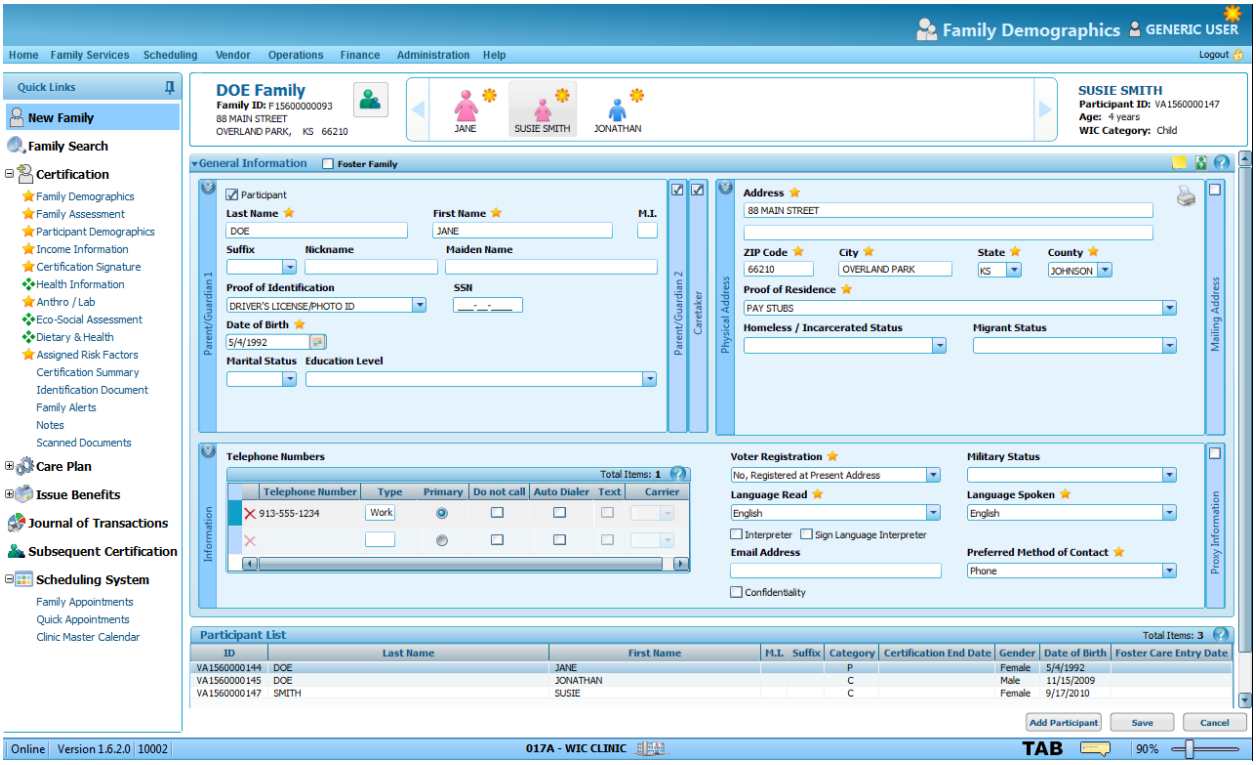


The new member's icon displays within the Family Header and family specific data, such as the Family ID and the same clinic, is assigned to the new member. In addition, the new member is assigned a unique Participant ID number.

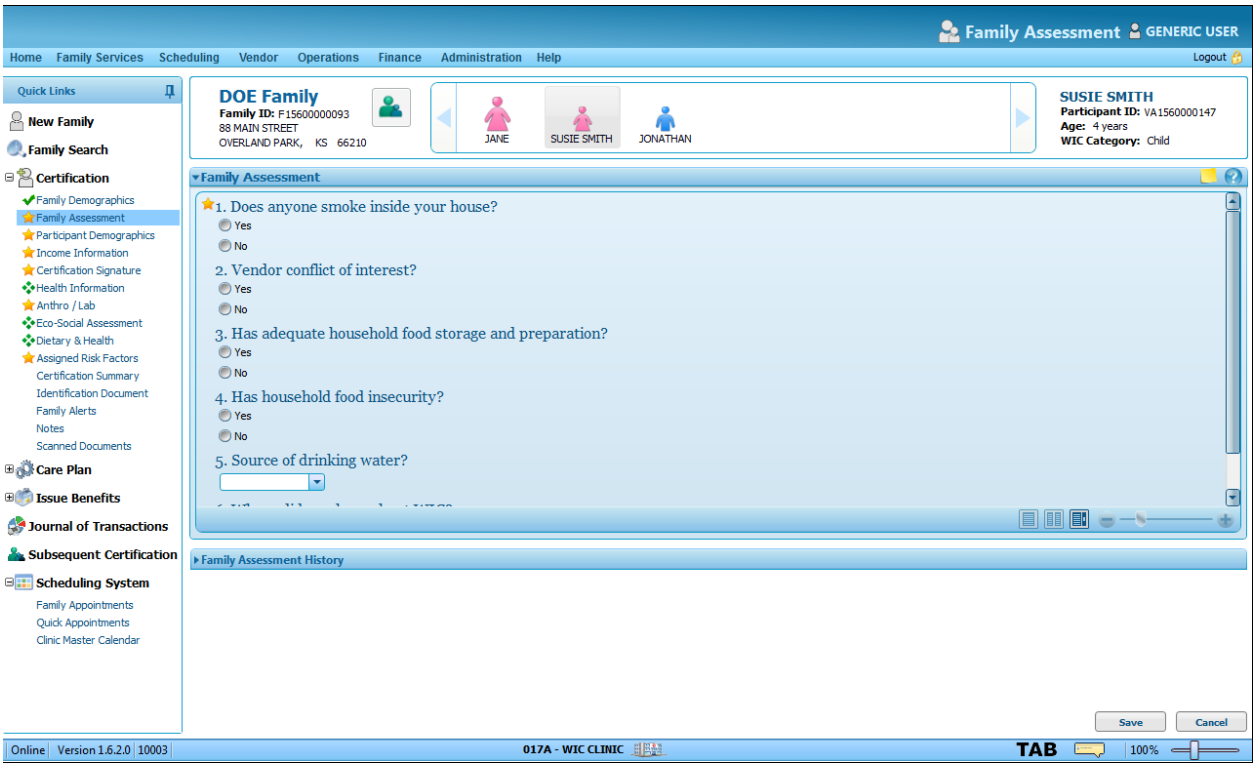
If the new member's last name matches the family name, then the new member's first name displays on their icon only. If the new member's last name is different from the family name, then both their first and last names display on their icon. In the example above, the family name is Doe (Doe Family). The new member's last name is Smith. Since the last names do not match, both the first and last name of the new member displays on their icon (Susie Smith).

6. Select the new member's icon within the **Family Header**. The family header refreshes to display the member's information.

7. Update the **Family Demographics** screen gathering as much information as possible.



8. Click **Save**. A status message displays indicating success and you are navigated to the next screen.



Congratulations!

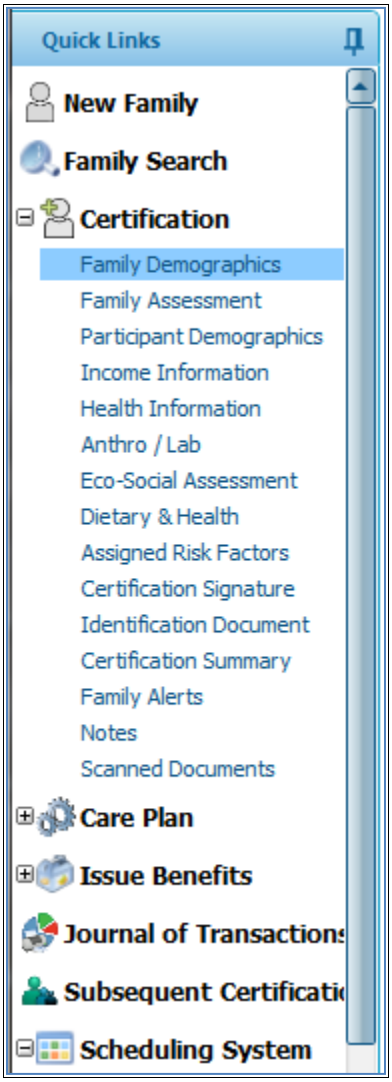
You have successfully completed the **Adding a New Member to an Existing Family** process.

THIS PAGE INTENTIONALLY LEFT BLANK

5- CERTIFICATION

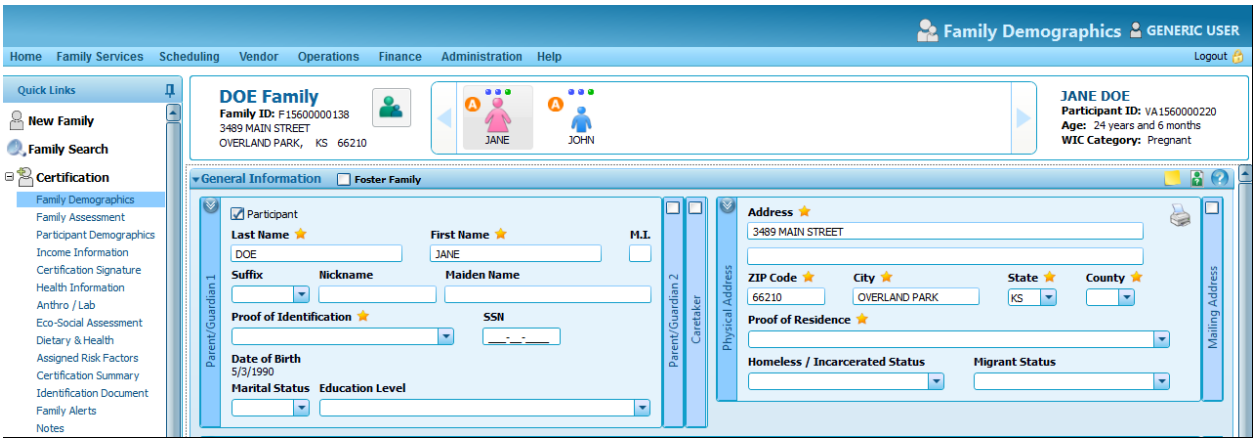
Certifying a Pregnant Woman and Her Two-year Old Child

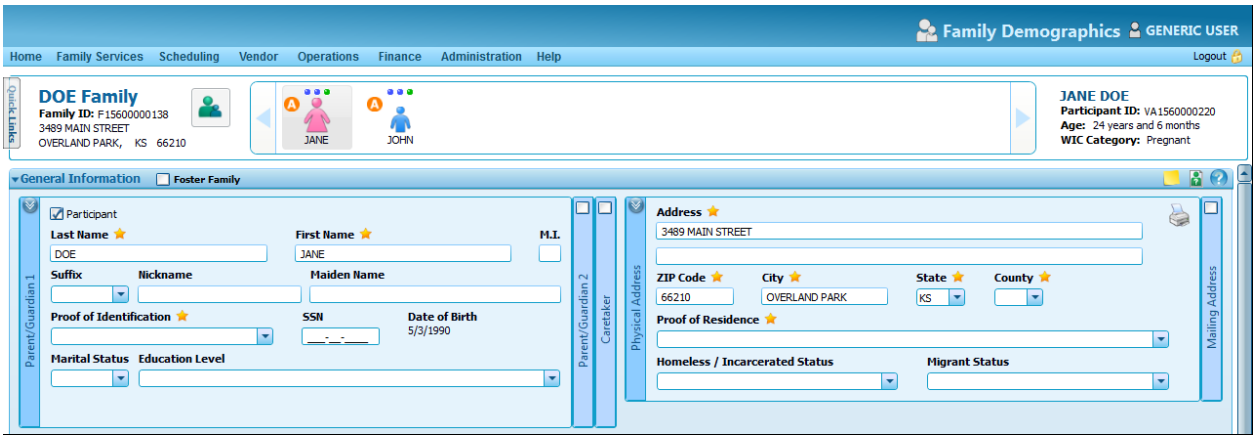
Certifications require that a number of system screens be completed. Some screens need to be completed once for the entire family, while other screens need to be completed individually for each member. Whether the system screen is applicable to the individual or to the family as a whole, the list of screens is located under the **Quick Links** menu on the left hand side of your PC screen.



This **Quick Links** displays during the certification process regardless of the system screen selected, unless you choose to hide it. You may hide **Quick Links** at any time by clicking the push pin icon next to **Quick Links**. You can re-display the list of screens at any time by clicking the **Quick Links** tab to the left of the Family Header.

Regardless of how you choose to use the **Quick Links** tab, the application resizes to accommodate your selection.





The order of the screens to be completed during a Certification attempt is configurable. The order your state WIC program chooses to use may be different from the order presented within this scenario.

For training purposes, you will complete each system screen (regardless of your role) in order to become familiar with the entire process. Prior to beginning the Certification process, you would have established a family record in the system consisting of a pregnant woman and her two-year-old child.

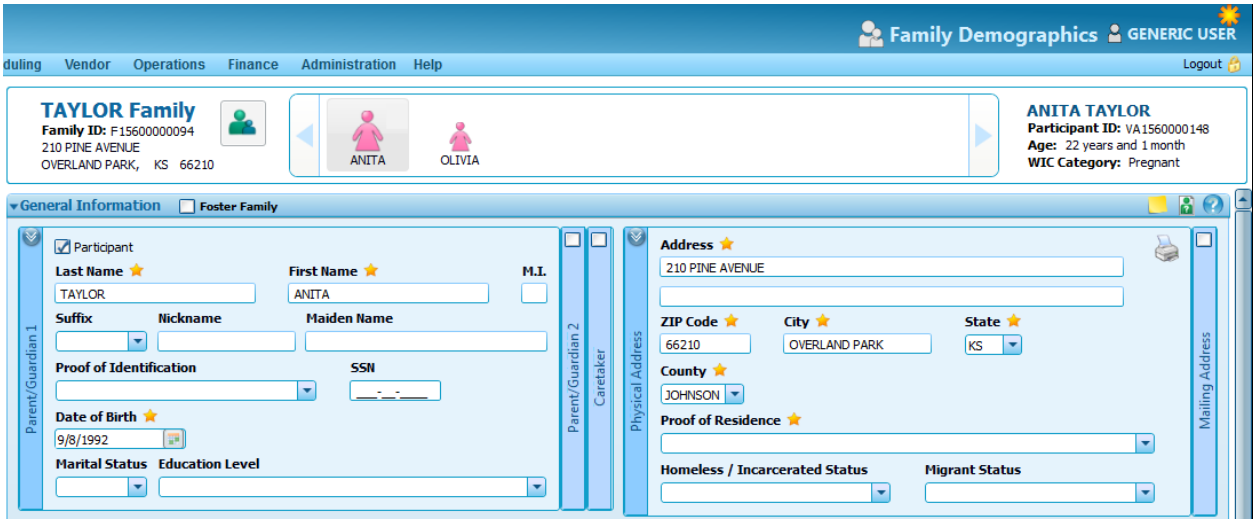
The process includes the following task(s):

Task A. Certifying the Family – Family Demographics Screen 5-3
Task B. Certifying the Family – Family Assessment Screen 5-8
Task C. Certifying the Family – Participant Demographics Screen 5-10
Task D. Certifying the Family – Income Information Screen 5-16
Task E. Certifying the Family – Certification Signature Screen 5-22
Task F. Certifying the Family – Health Information Screen 5-27
Task G. Certifying the Family – Anthro/Lab Screen 5-36
Task H. Certifying the Family – Eco-Social Assessment Screen 5-45
Task I. Certifying the Family – Dietary & Health Screen 5-48
Task J. Certifying the Family – Assigned Risk Factors Screen 5-51
Task K. Certifying the Family – Certification Summary Screen 5-55

Task A. Certifying the Family – Family Demographics Screen

Complete the following steps to perform this task:

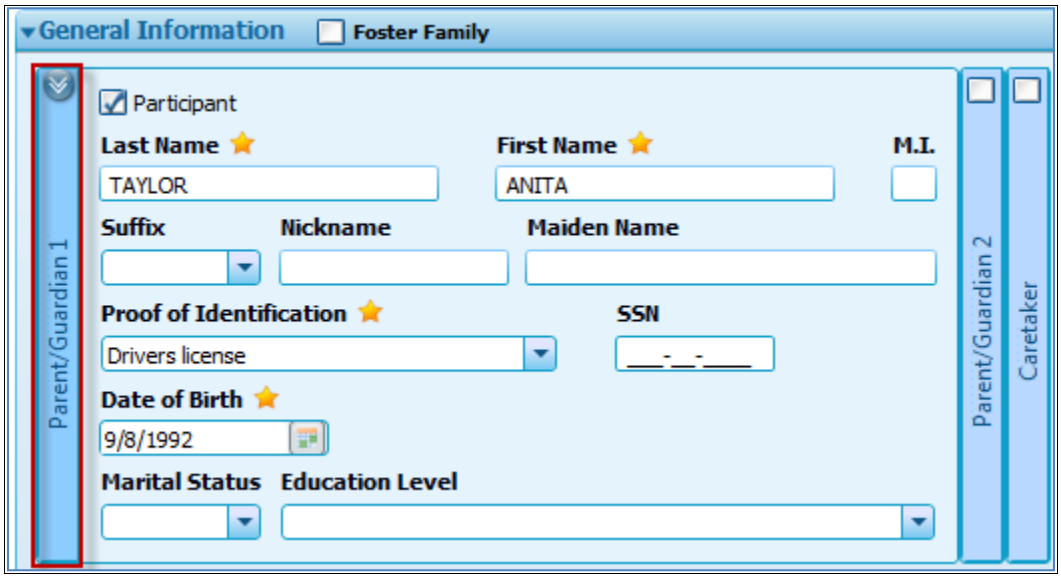
1. Add and access a family record consisting of a pregnant woman and a child. Each family member displays as an icon within the **Family Header**.



This screen is a family screen. It can be completed with any family member selected.

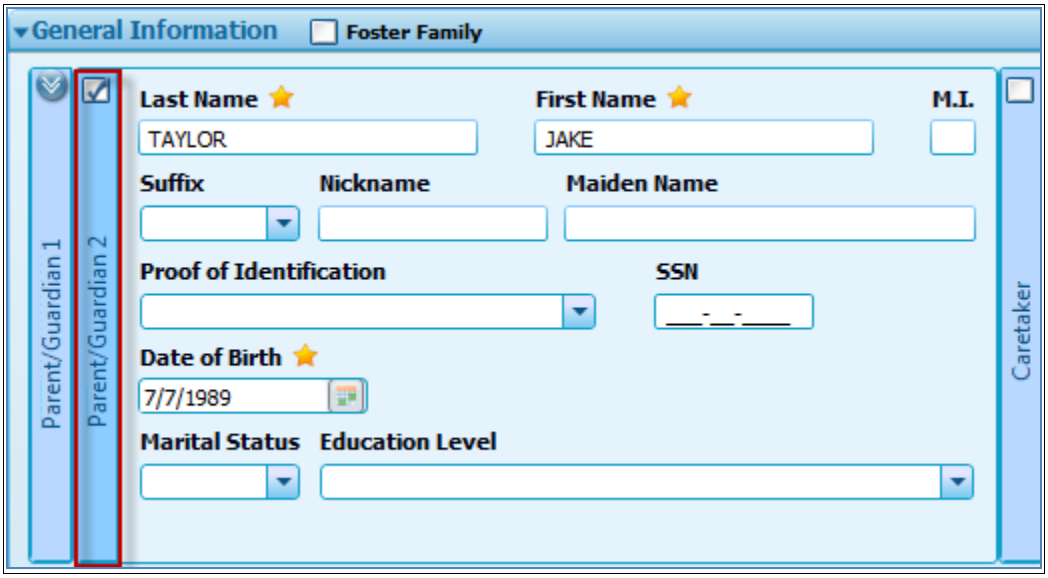
2. Complete the **Family Demographics** screen by doing the following:

   a. Under General Information, complete the Parent/Guardian1 section. The Participant checkbox on Parent/Guardian1 indicates whether the parent or guardian is also the woman participant in the family.



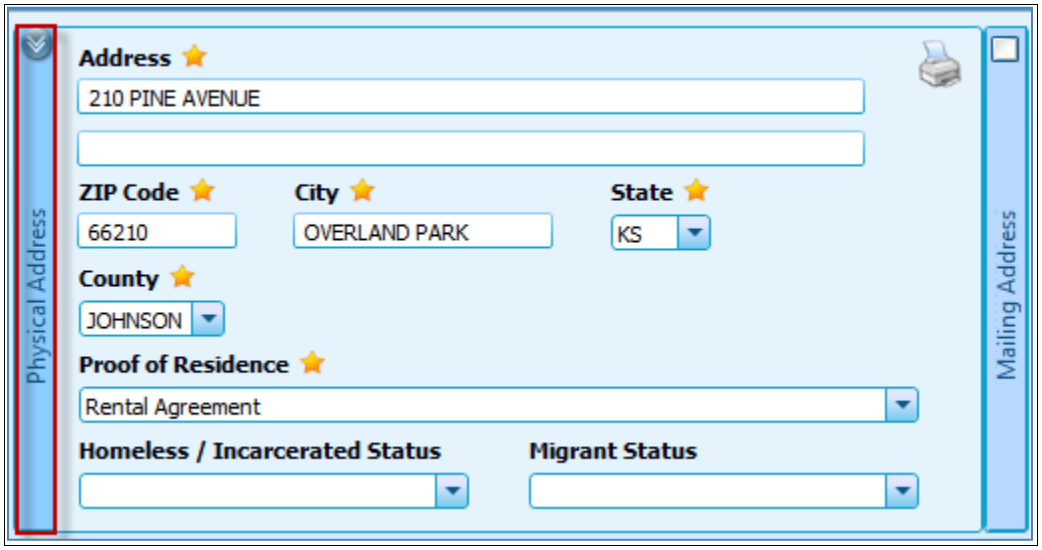
Only the items marked with the Required Information icon (★) are required. However, State or Local Agency policy may require you to enter more than the system-required items.

b. Under **General Information**, complete the **Parent/Guardian2** section by clicking the check box, if applicable.

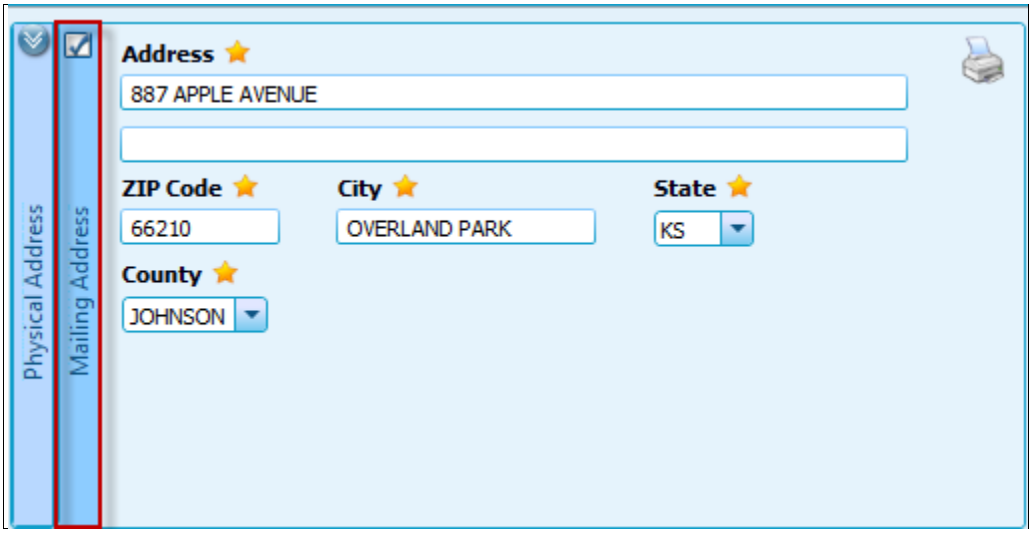


c. Under **General Information**, complete the **Caretaker** section by clicking the check box, if applicable.

d. Under **General Information**, complete the **Physical Address** section.

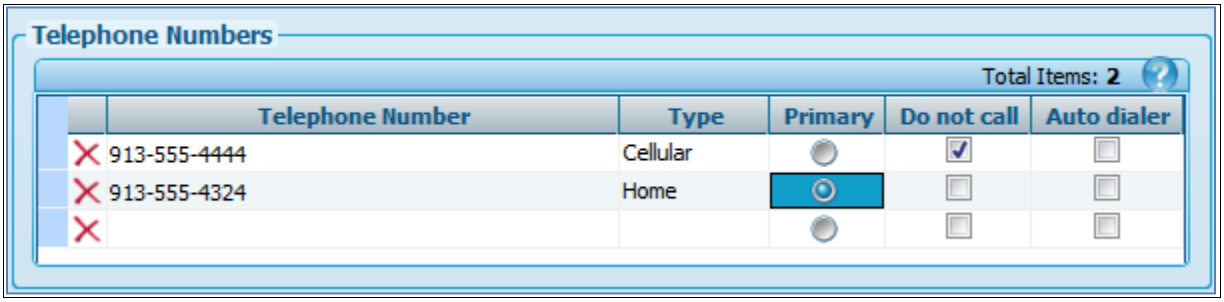


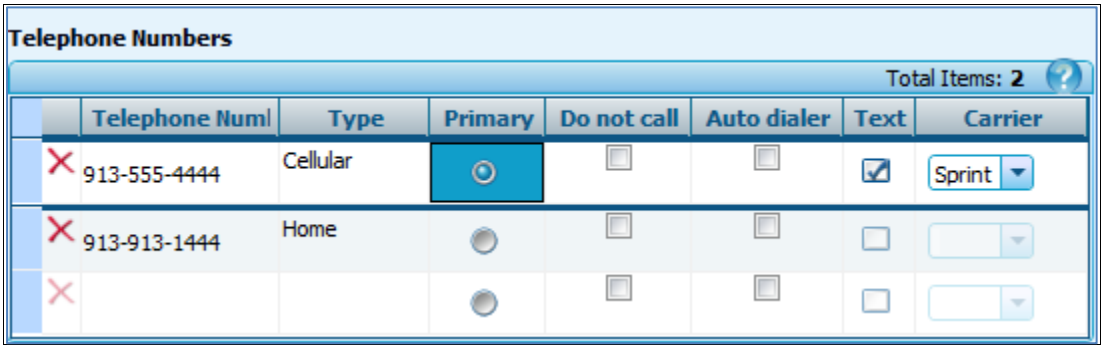
e. Under **General Information**, complete the **Mailing Address** section by clicking the check box if mailing address is different from physical address.



f. Under **General Information**, complete the **Telephone Numbers** section. Add as many phone numbers as necessary.

913





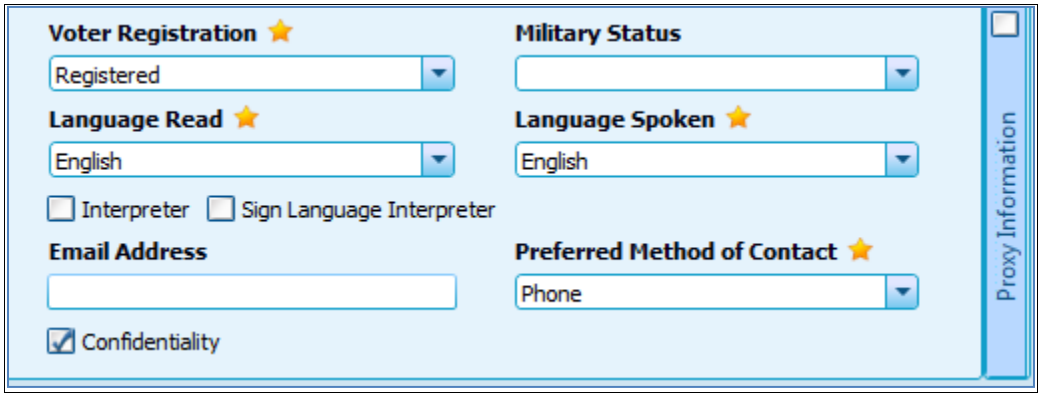
One number must be selected as the primary point of contact for the applicant if a number is listed.

Check Do not call if the applicant requests not to be called at the associated number.

Check Auto dialer if the applicant is interested in receiving auto dialed messages at the associated number.

Check Text if the applicant is interested in receiving text messages. A Carrier must be selected if Text is selected.

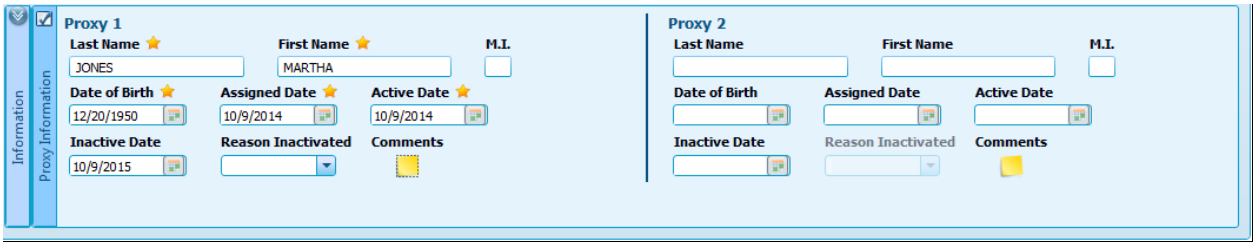
g. Continue completing the **Information** section.



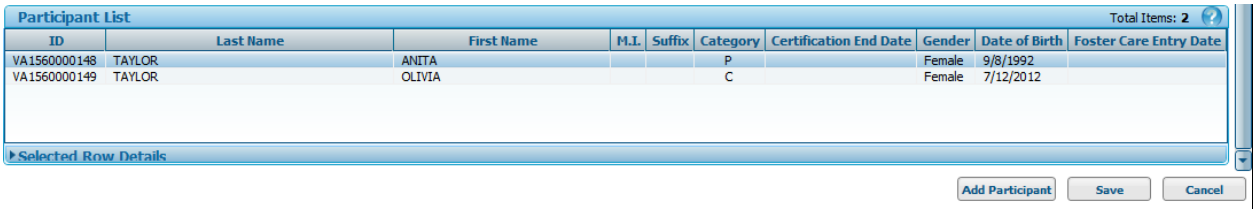
Each time the physical address for the family is changed, the Voter Registration field is cleared and it is mandatory to re-enter the information.

Check Confidentiality to document that the parent/guardian wishes confidentially of information.

h. Under the **Information** section, complete the **Proxy Information** section by clicking the check box.

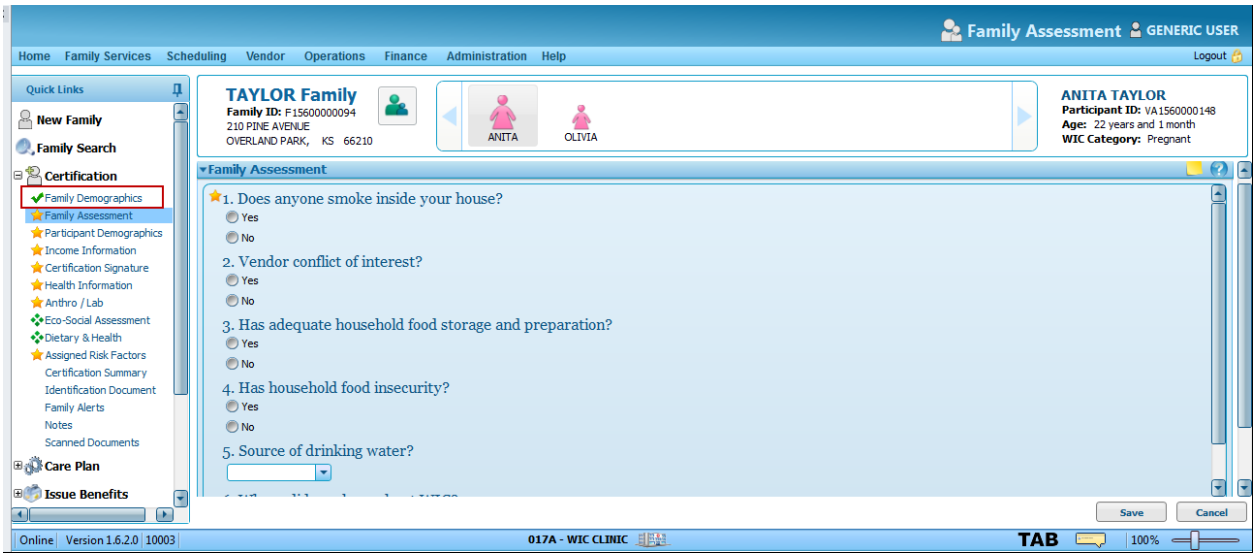


3. Click **Add Participant** to add additional members to the family record as needed.



A Dirty Data Indicator ( ) displays on a family member's icon when changes are made to the screen. You may make multiple screen changes before clicking Save. Once changes are saved, the indicator is cleared from the member icon.

4. Click **Save**. A status message displays indicating success and you are navigated to the next screen in the process.



A green Checkmark icon ( ) displays on the Quick Links menu indicating the screen has been completed.

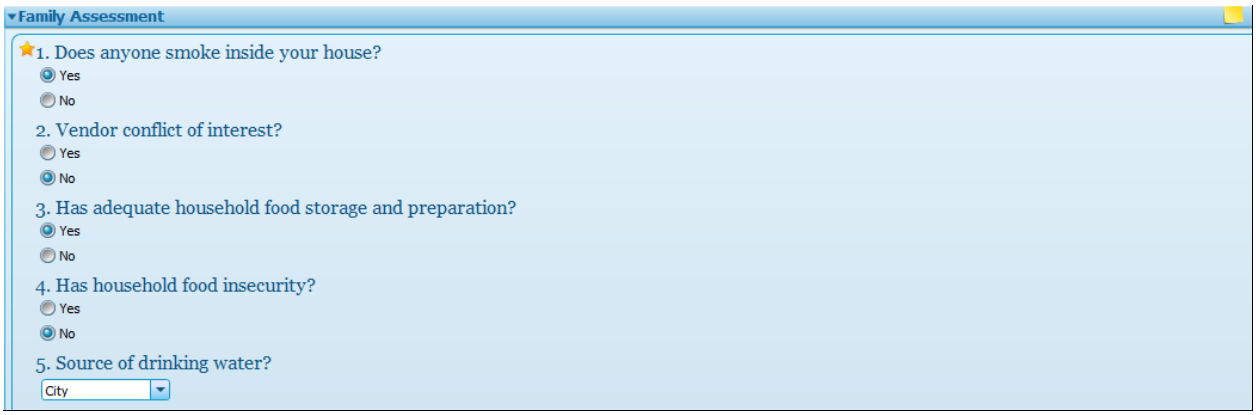
Task B. Certifying the Family – Family Assessment Screen

Complete the following steps to perform this task:

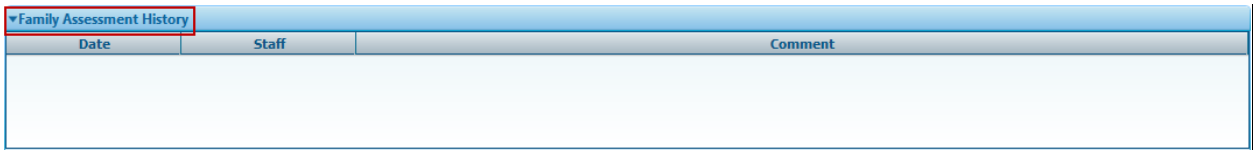
1. Complete the **Family Assessment** screen by doing the following:

> This screen is a family screen. It can be completed with any family member selected.

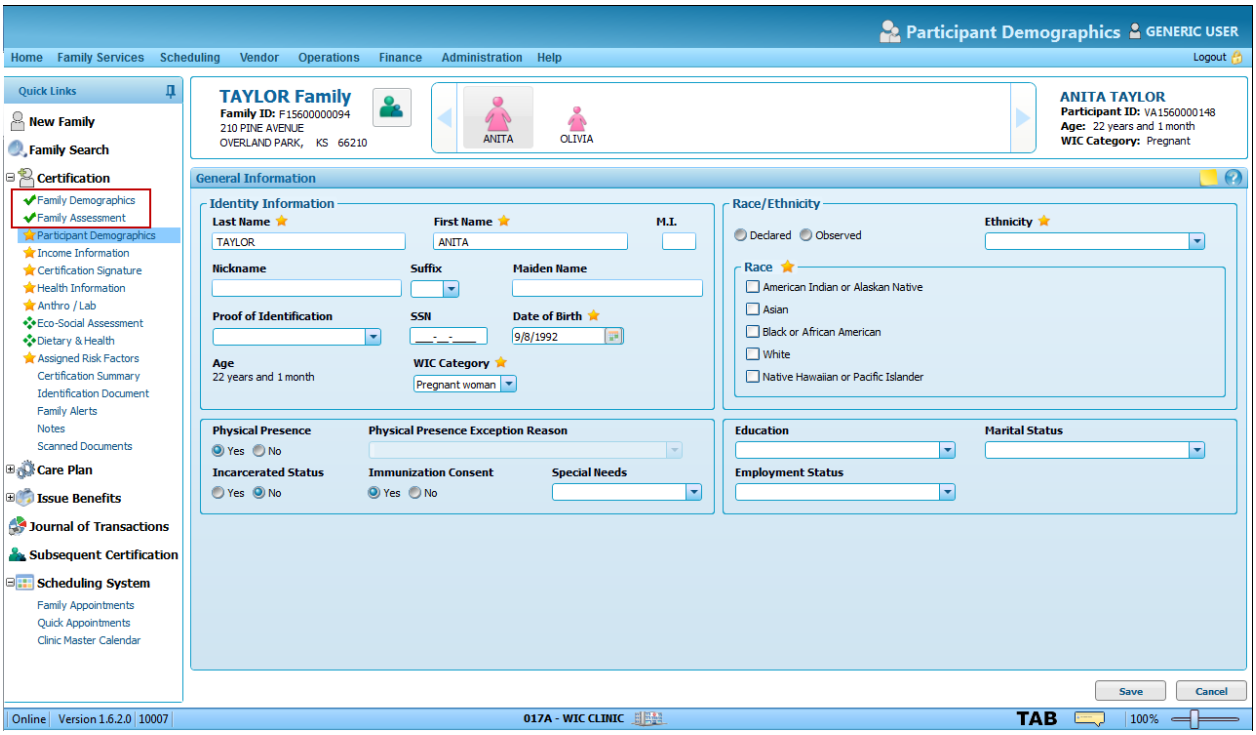
a. Enter or select answers to the questions listed.



b. Expand the **Family Assessment History** section to view previously completed assessments, when applicable.



2. Click **Save**. A status message displays indicating success and you are navigated to the next screen in the process.



Task C. Certifying the Family – Participant Demographics Screen

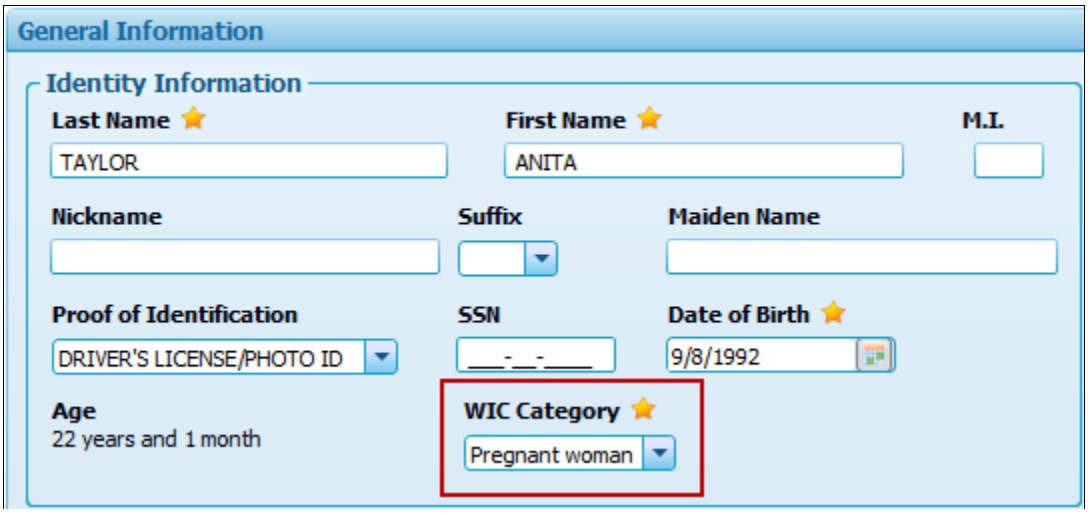
The **Participant Demographics** screen must be completed for each family member separately. Select the desired family member icon within the **Family Header** to display the screen for the selected member.

For training purposes, this scenario will document the completion of each system screen for the woman first followed by the completion of each screen for the child. Outside of formal training, choose the order that works best for you.

Complete the following steps to perform this task:

1. Complete the **Participant Demographics** screen for the woman by doing the following:

   a. Complete the Identify Information section.

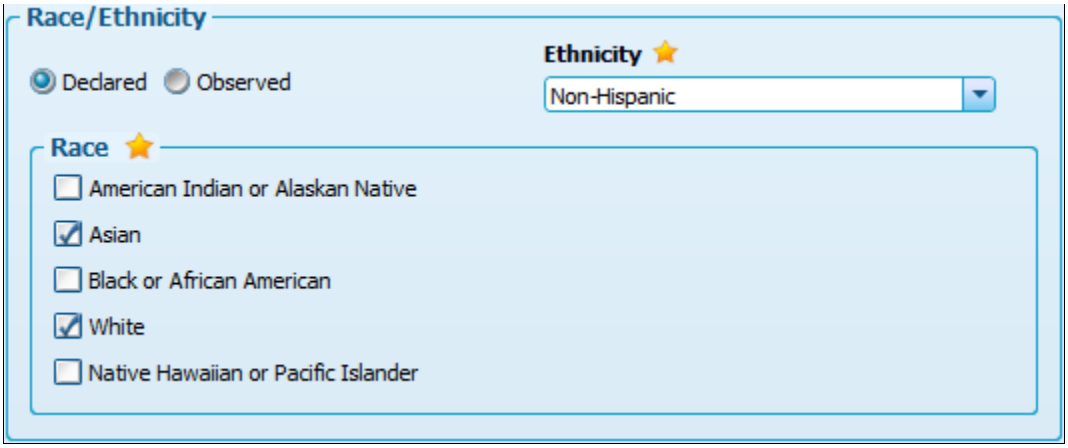


For training purposes, ensure a WIC Category of Pregnant is selected for the woman.

The Date of Birth value can be changed for an applicant until the Certification is completed. When the Certification is completed the applicant is marked as Active and its date of birth cannot be changed.

A WIC Category can be changed for an applicant until the Certification is completed. When the Certification is completed the applicant is marked as Active and its status is changed to Participant.

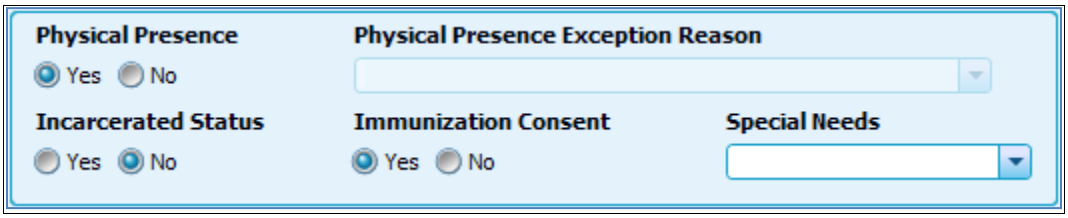
b. Complete the **Race/Ethnicity** section.



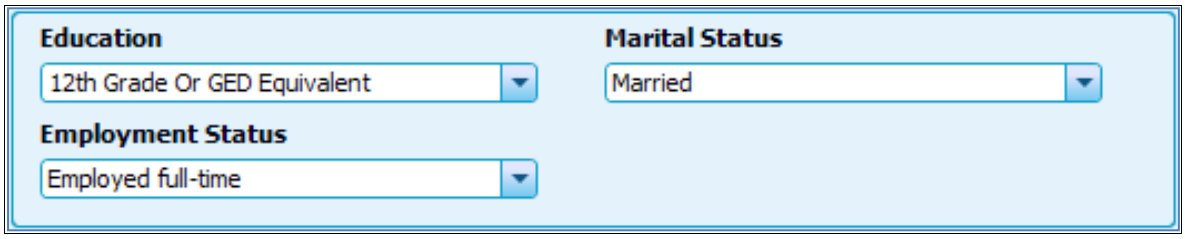
Select Declared if race/ethnicity is declared by the applicant. Select Observed when it is necessary for you to make your own determination as to the applicant's race/ethnicity.

Multiple check boxes can be selected under Race as necessary.

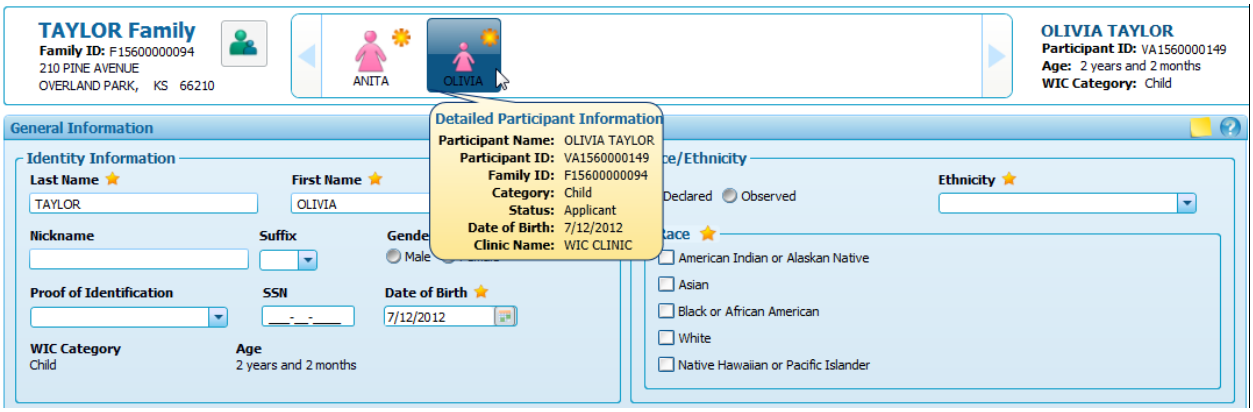
c. Complete the group box shown below.

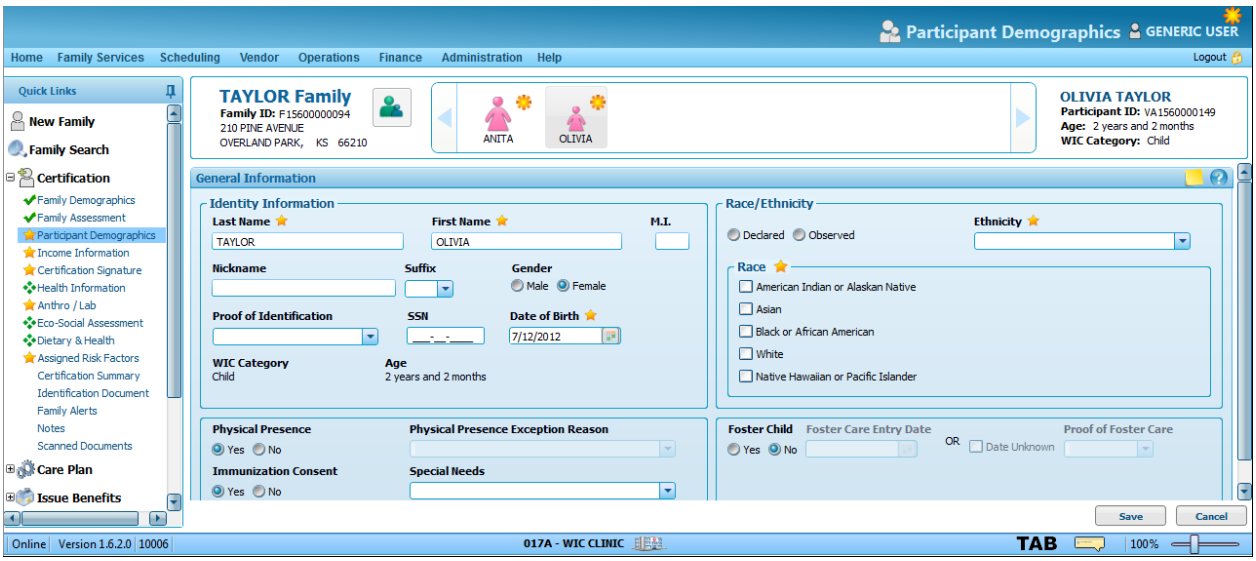


d. Complete the group box shown below.



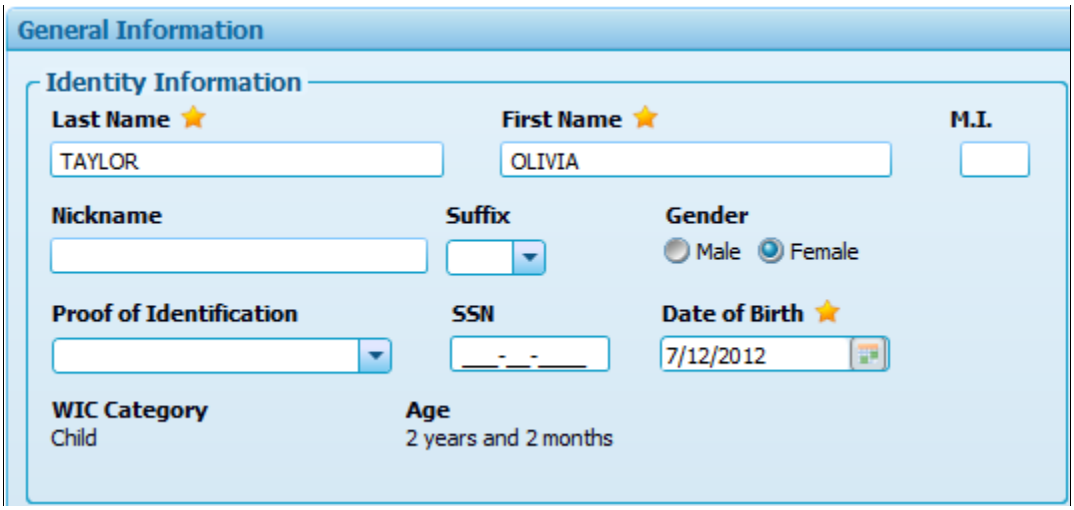
2. Select the child member icon in the family header. The screen refreshes and displays information associated to the child.





3. Complete the **Participant Demographics** screen for the child by doing the following:

   a. Complete the **Identify Information** section.

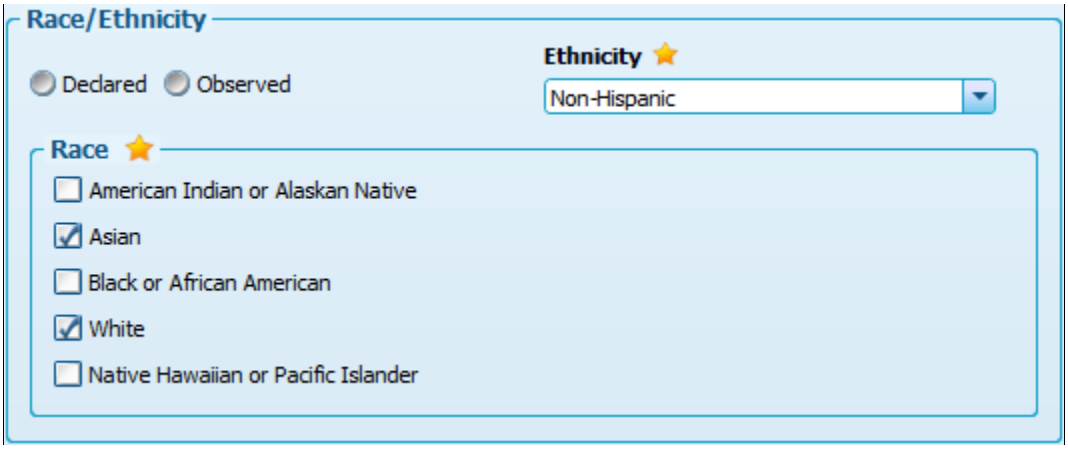


The initial selection for Gender displays the user entered selection when the member was added to the family. The gender can be changed for an applicant until the Certification is completed. When the Certification is completed the applicant is marked as Active and its gender cannot be changed.

The Date of Birth value can be changed for an applicant until the Certification is completed. When the Certification is completed the applicant is marked as Active and its date of birth cannot be changed.

The system automatically assigns a Child WIC Category to the child member based on the user entered Date of Birth value. If a different WIC Category is needed, the member's Date of Birth must be modified.

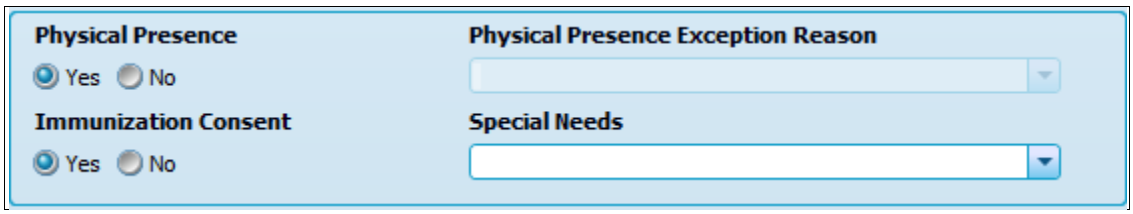
   b. Complete the **Race/Ethnicity** section.



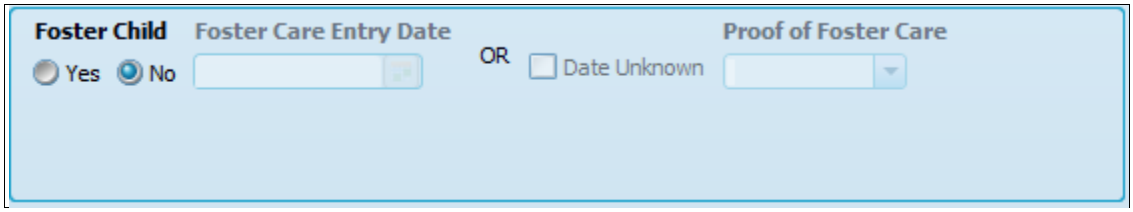
Select Declared if race/ethnicity is declared by the applicant or parent/guardian. Select Observed when it is necessary for you to make your own determination as to the applicant's race/ethnicity.

Multiple check boxes can be selected under Race as necessary.

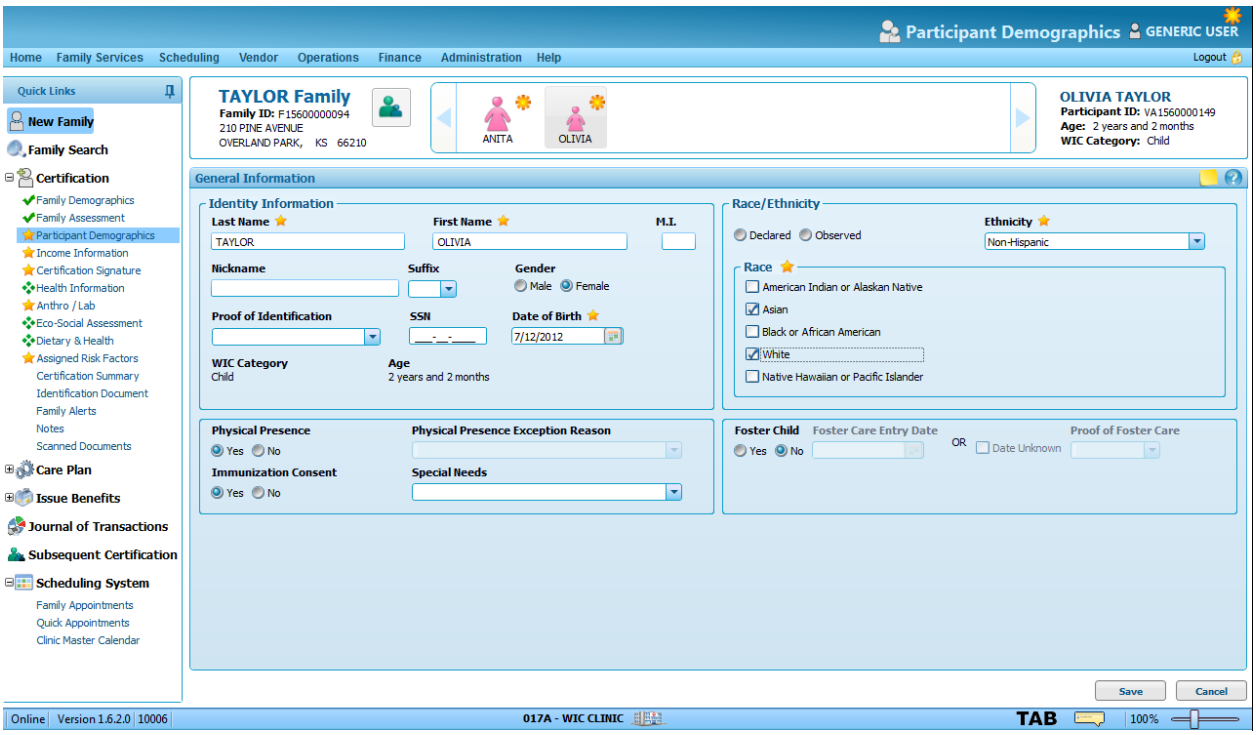
c. Complete the group box shown below.



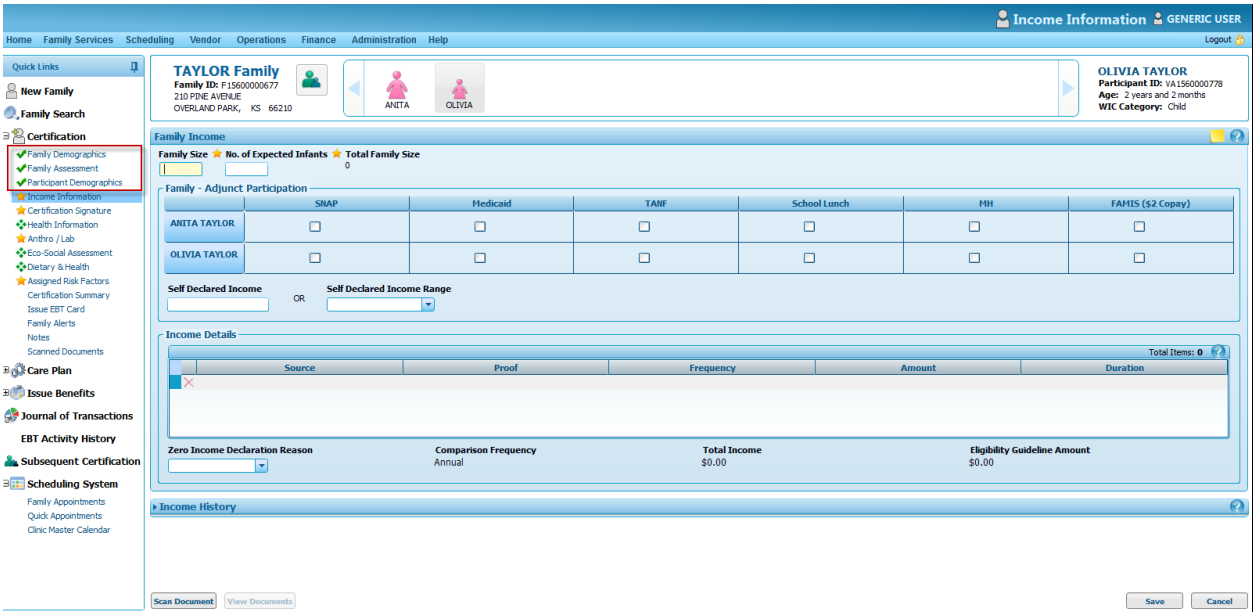
d. Complete the group box shown below.



Select Yes to indicate the child is a Foster Child. In these cases, a Foster Care Entry Date must be entered and a Proof of Foster Care must be selected.



4. Click **Save**. A status message displays indicating success and you are navigated to the next screen in the process.



Task D. Certifying the Family – Income Information Screen

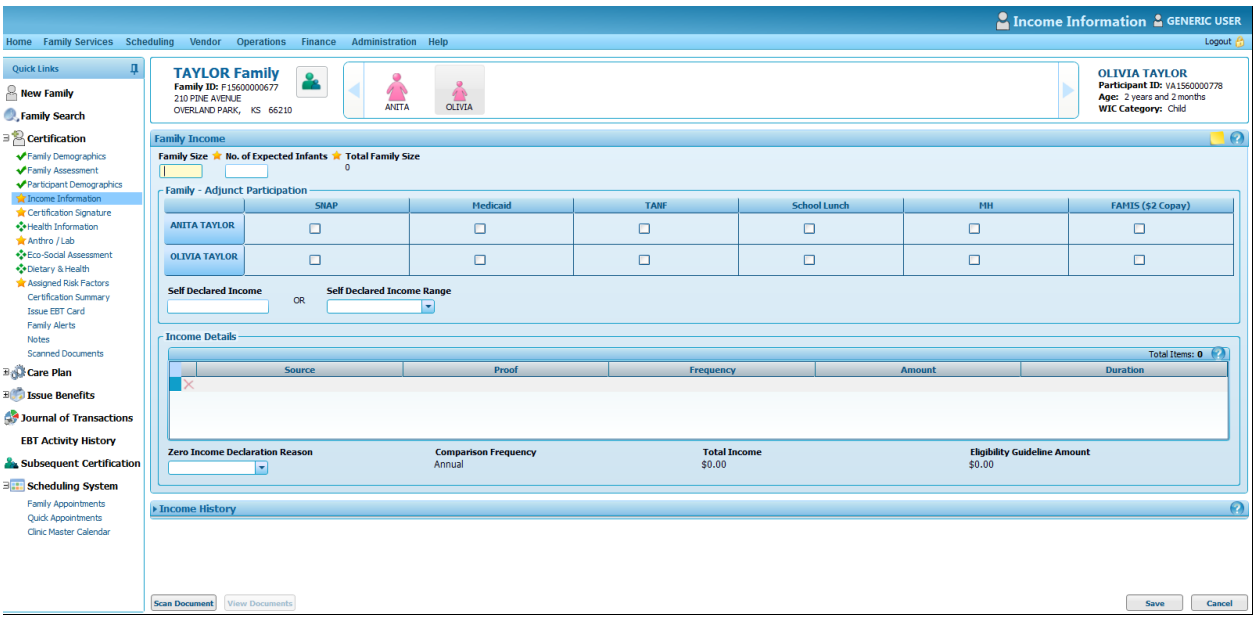
The Income Information screen is a family screen. It can be completed with any family member selected. (Foster children are the exception. For more detail, consult the Adding a Foster Child to a Non-foster Family scenario.)

The process of documenting income will be illustrated using three different methods. The three methods are listed below and includes the name of the scenario that illustrates how to document each method:

Detailed income declarations: Certifying a Pregnant Woman and Her Two Year Old Child scenario (current scenario)

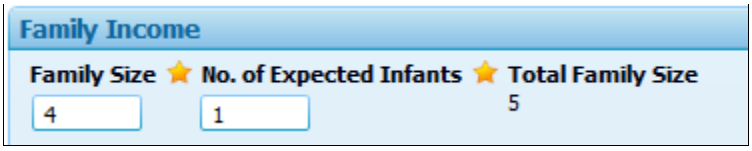
Adjunctively income eligible program participation: Certifying a Breastfeeding Woman and Her Infant scenario

Zero income declarations: Certifying a Non-breastfeeding Woman and Her Infant scenario



Complete the following steps to perform this task:

1. Enter the number of members in the family in **Family Size**.
2. Enter the number of **Expected Infants**.

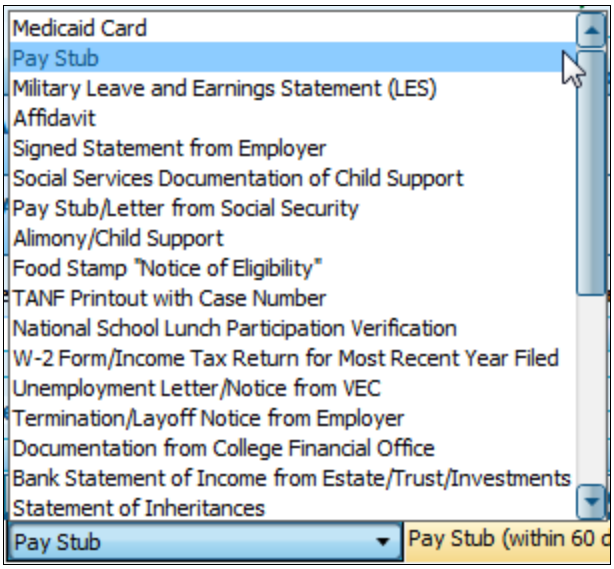


In this scenario, a Family Size of 4 and a No. of Expected Infants of 1 has been entered. The values for Family size and Number of Expected Infants (completed on Pregnant categories only) are combined to indicate the Total Family Size (5). Total Family Size is used to determine the Eligibility Guideline Amount allowed for the size of the family.

3. Within the **Income Details** grid, enter a row of information for each income source associated to the family until all applicable income is reported by doing the following:

   a. 1st row of income:

      i. Enter or select the **Source**. (See sample screen below.)

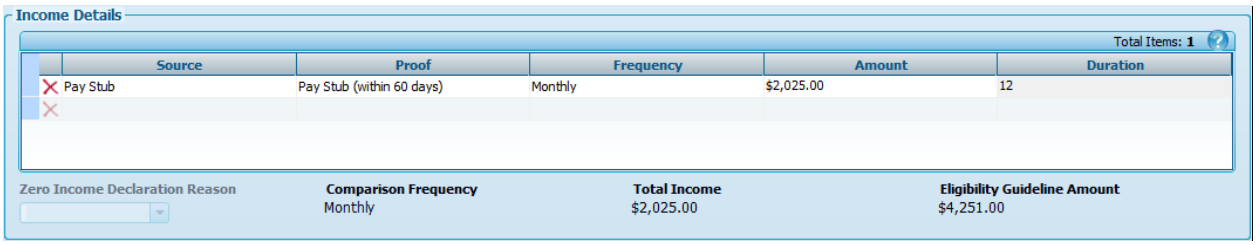


      ii. Enter or select the **Proof**.

      iii. Enter or select the **Frequency**.

      iv. Enter the **Amount**.

      v. Enter the **Duration**.



   b. 2nd row of income:

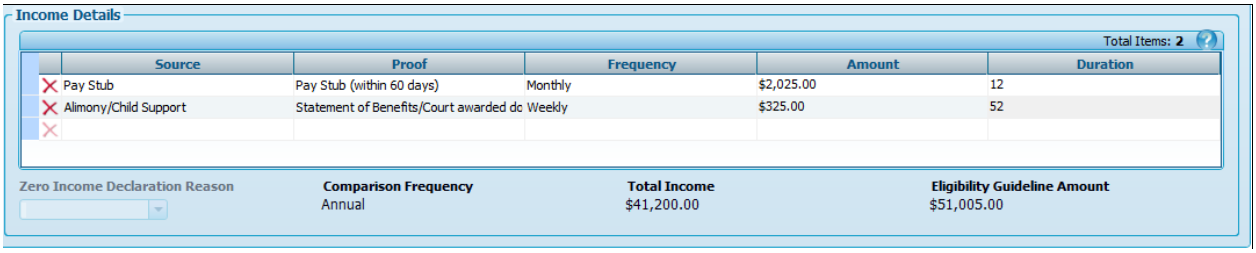
      i. Enter or select the **Source**.

      ii. Enter or select the **Proof**.

      iii. Enter or select the **Frequency**.

iv. Enter the **Amount**.

v. Enter the **Duration**.



The value entered for Duration equals the portion of the year represented by the income source.

Comparison Frequency will be displayed as:

The same value listed for Frequency if there is one income source or all sources share the same Frequency value.

Annual: When there are two or more income sources and the Frequency values for all sources do not match.

Income Sources and Their Frequency	Income Comparison Frequency Selected by the System
Single weekly source	Weekly
Multiple monthly sources	Monthly
Mixture of weekly and monthly sources	Annual
Single hourly source	Weekly
Mixture of hourly and weekly sources	Weekly
Mixture of hourly and monthly sources	Annual

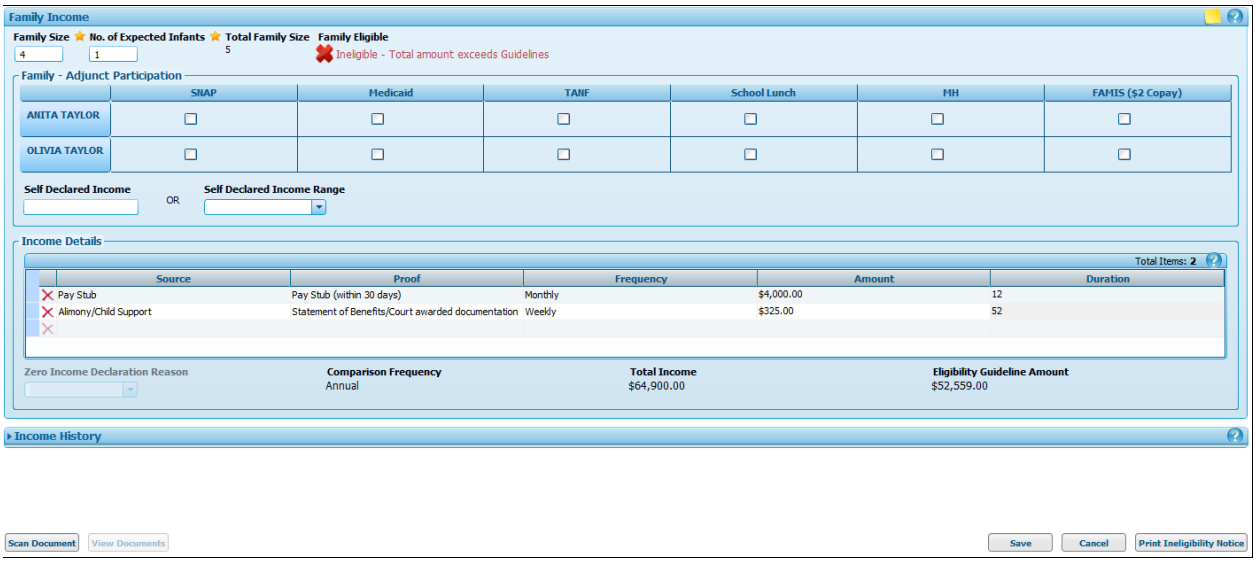
The Total Family Income is compared to the Income Eligibility Guideline Amount to determine if the family is income eligible. If the Total Family Income is less than or equal to the Eligibility Guideline Amount, the family is income eligible. A green check mark displays at the top of the screen. If the Total Family Income is greater than the Eligibility Guideline Amount, the **Applicant Ineligible** icon ( ) displays at the top of screen indicating the family is not income eligible.

4. Click **Save**. A status message displays indicating information was saved.

The Applicant Ineligible icon ( ) displays at the top of the screen if the income entered exceeds income guidelines (see example below).

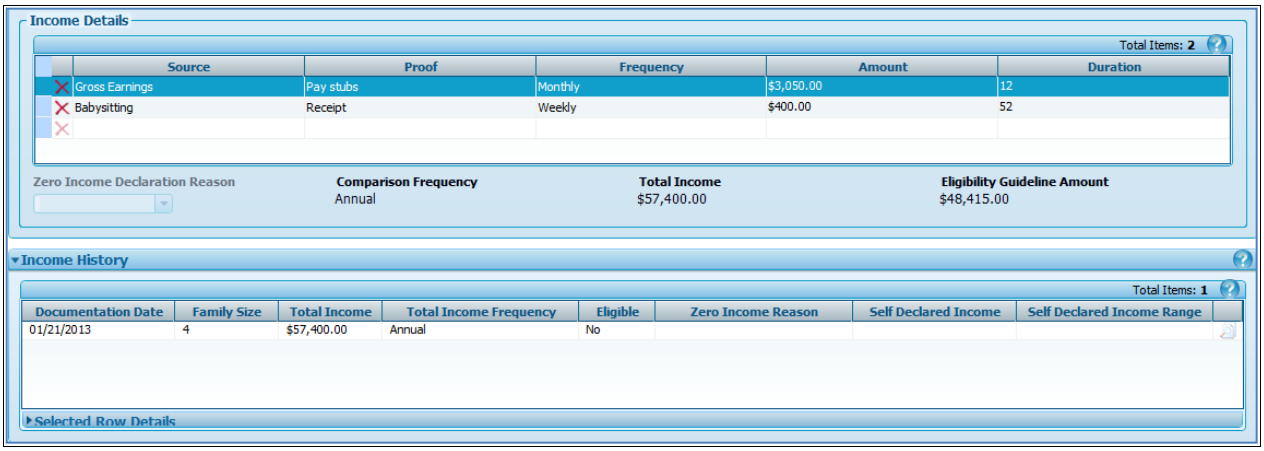
Additionally, the Applicant Ineligible icon ( ) displays in front of Income Information quick link after the income information is saved (see example below).

Income values can be changed even after the income information has been saved. Simply click the Income Information quick link to navigate back to the Income Information screen and edit the previously entered values. If the newly entered values, meet (or are below) income guidelines, a green check mark will display indicating eligibility. Click Save to save the changes.

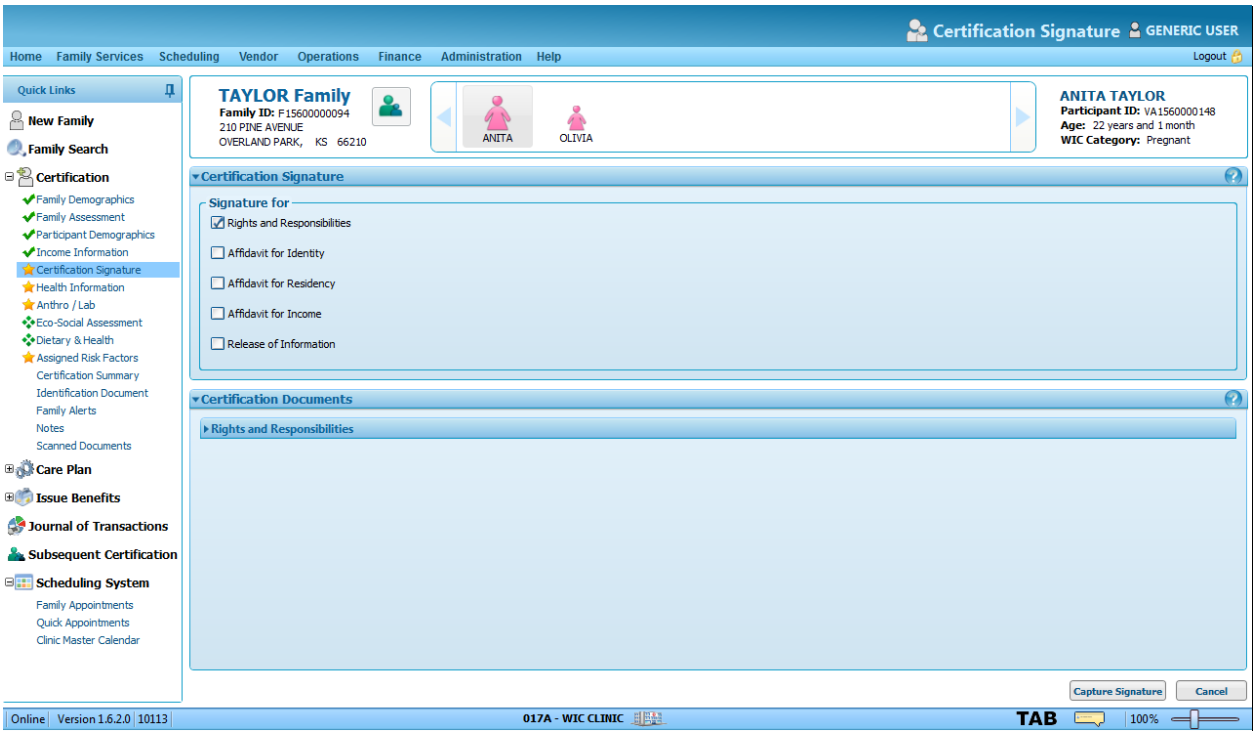


Note that the Zero Income Declaration Reason field is not enabled. This field is enabled and required when the family reports zero income and is not Adjunctively Income Eligible.

Expand the Income History container to view information about previous income screenings.



5. Click **Save**. The system refreshes and you are navigated to the next screen in the process.

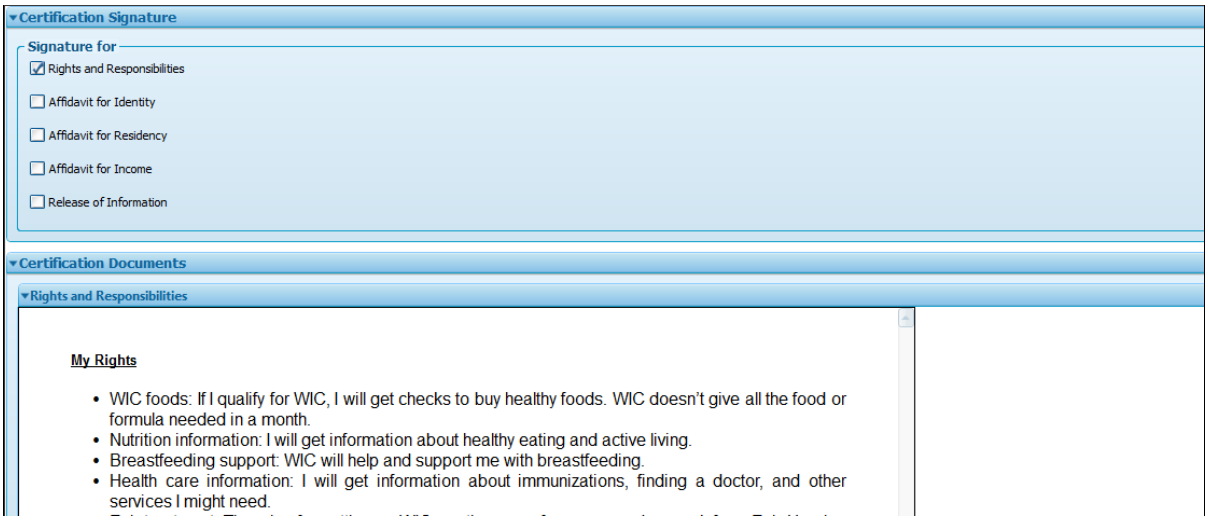


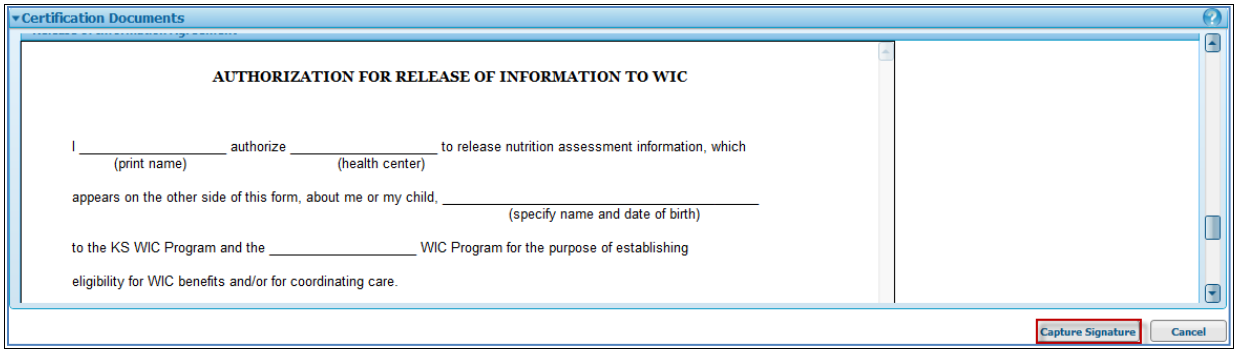
Task E. Certifying the Family – Certification Signature Screen

Complete the following steps to perform this task:

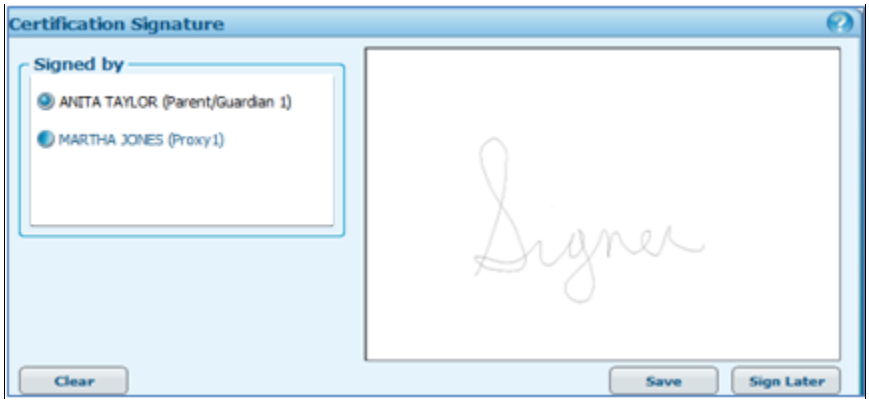
1. Complete the **Certification Signature** screen for the woman by selecting the option(s) for which to capture a signature.

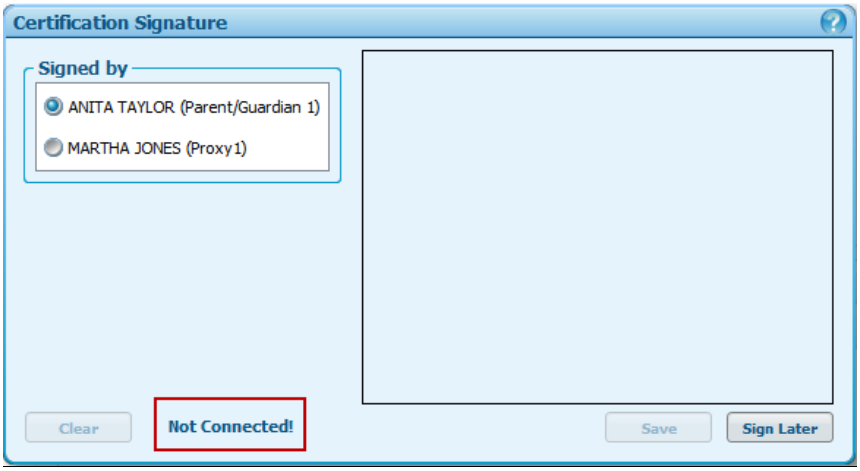
> This screen is a family screen. It can be completed with any family member selected.





2. Click **Capture Signature** to capture an electronic signature. The **Certification Signature** screen displays.





At least one option must be checked before the Capture Signature button is enabled.

The system automatically checks the Rights and Responsibility option for the first family member who completes the Certification Signature screen. Once you obtain the signature, the system automatically signs the Rights and Responsibility for the remaining family members and displays a green Checkmark icon (✔) indicating completion.

A signature must be captured for the Rights and Responsibilities option before you can complete the Certification process.

For each option selected, a Template text displays and can be viewed by clicking on the associated arrow button.

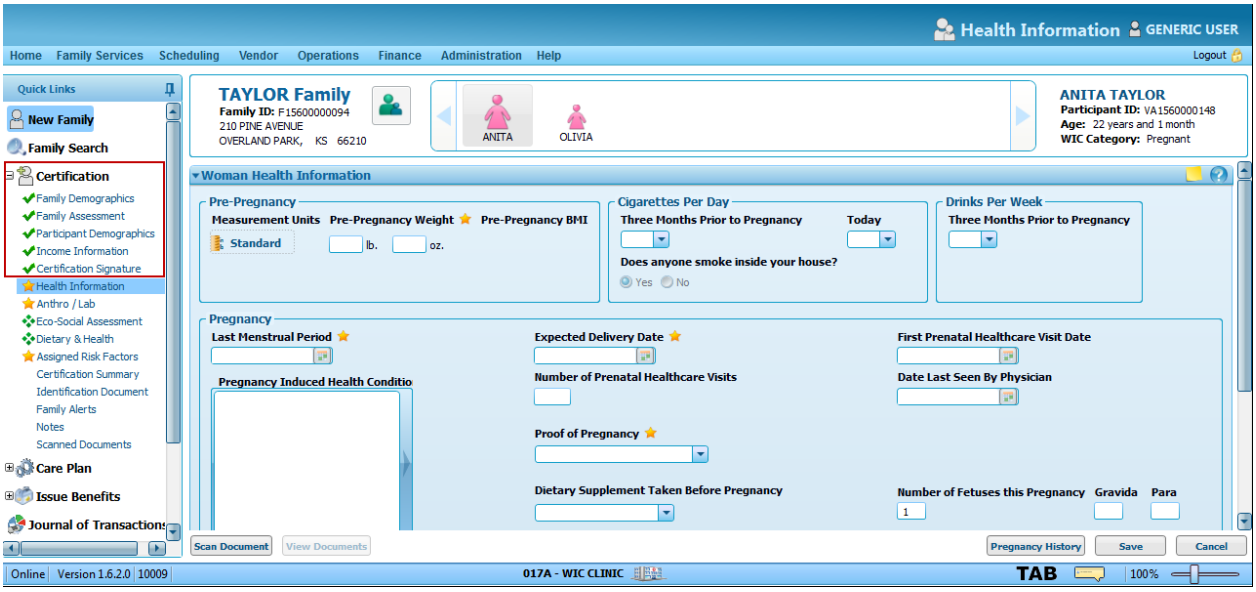
If the signature pad is disconnected, the Certification Signature screen displays a Not Connected! link (example shown above). Verify that the signature pad is connected to the PC and then click the Not Connected! link to attempt to establish a connection.

a. Select the desired parent, guardian, or caretaker within the **Signed by** section.

b. Direct the individual to sign.

> For training purposes, we will assume the woman is of age and capable of signing for the family. Outside formal training, direct the appropriate parent, guardian, or caretaker to sign the signature pad.

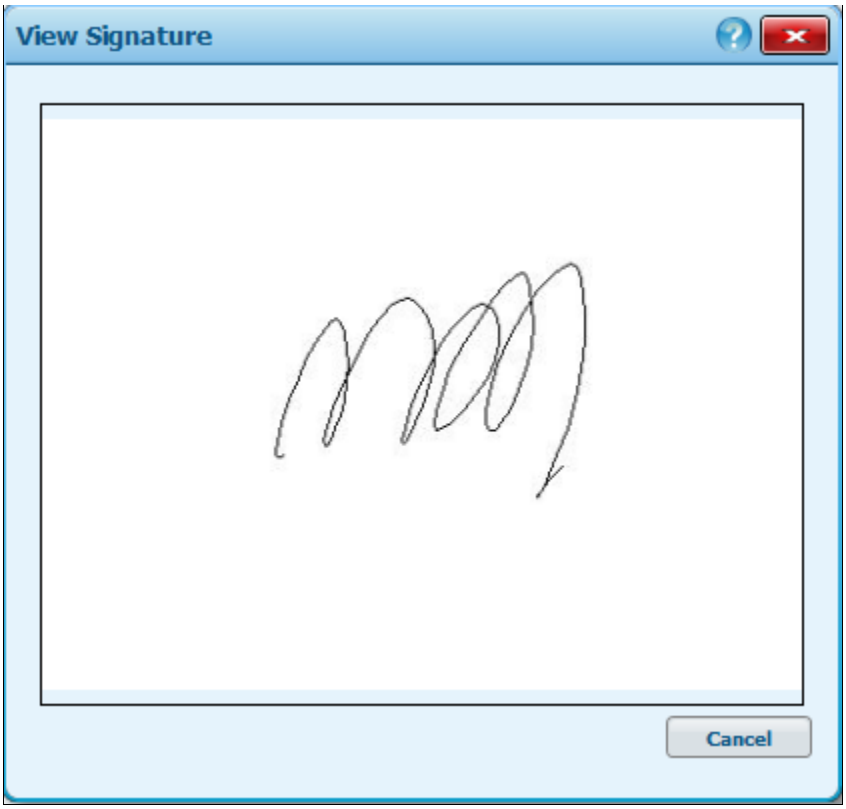
3. Click **Save**. The participant's signature is now saved to the family record and you are navigated to the next screen in the process.



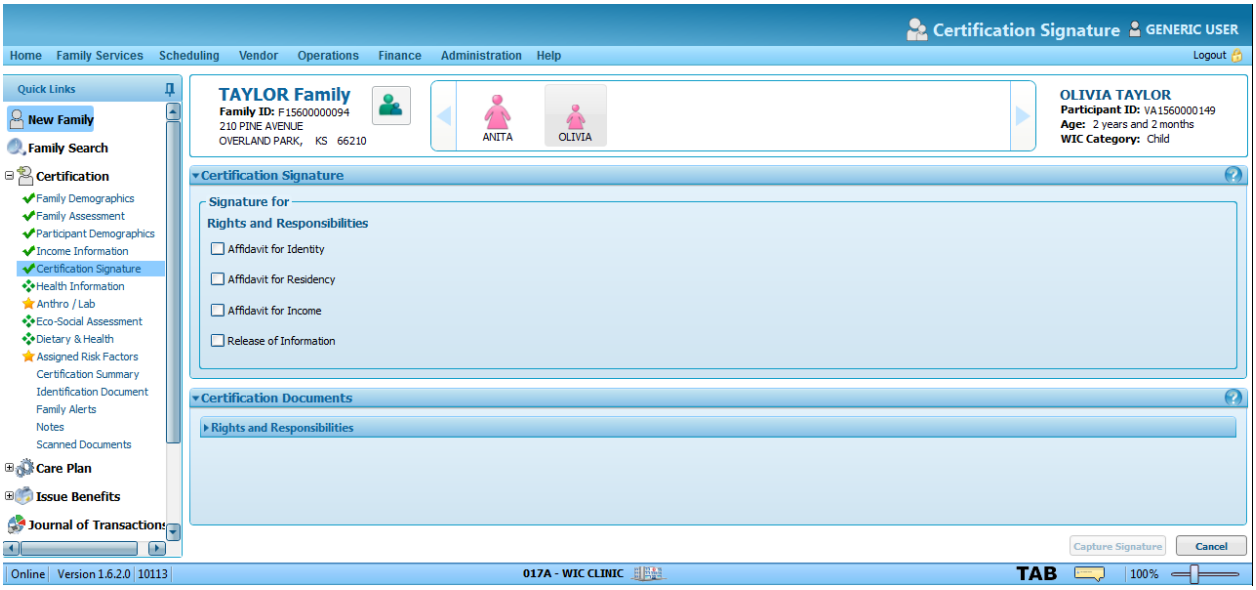
4. If you are interested in viewing the recently captured signature, do the following:

   a. Click on the **Certification Signature** option in **Quick Links**.

   b. Click on the **Transaction History** arrow. Select a row in the grid and select **View Signature**. The **View Signature** popup screen displays.



5. Select the child member icon within the **Family Header**. The **Certification Signature** screen displays a green check for the child.



This screen is a family screen and can be completed with any member selected. However, the Child's icon was selected for illustrative purposes to show that once a signature is captured, a green check mark displays for all members of the family.

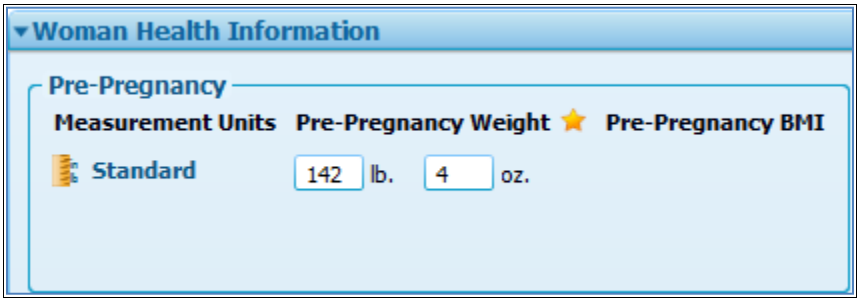
6. Since the **Certification Signature** screen for the child is complete, navigate to the **Certification Summary** screen.

Task F. Certifying the Family – Health Information Screen

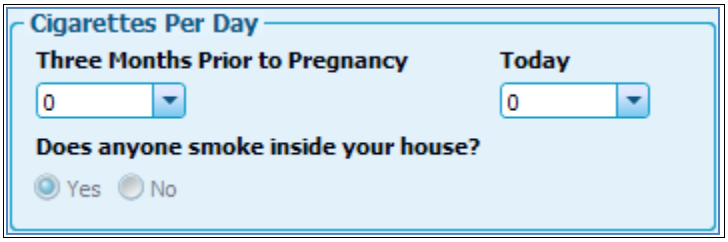
As with the **Participant Demographics** screen, the **Health Information** screen must be completed separately for each family member. This task will begin with the pregnant woman's health information. (However, you should complete health information for infants before entering the mom's information with a dyad.)

Complete the following steps to perform this task:

1. Complete the **Pre-Pregnancy** group box for the woman.

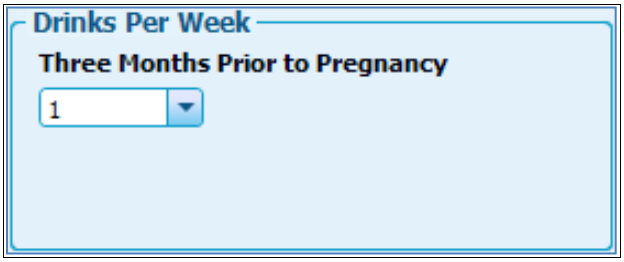


2. Complete the **Cigarettes Per Day** group box for the woman.



The system displays the user documented response for the Does anyone smoke inside your house? question from the Family Assessment screen. This information is read-only and cannot be updated on this screen. To update the information, navigate to the Family Assessment screen and then update the response.

3. Complete the **Drinks Per Week** group box for the woman.



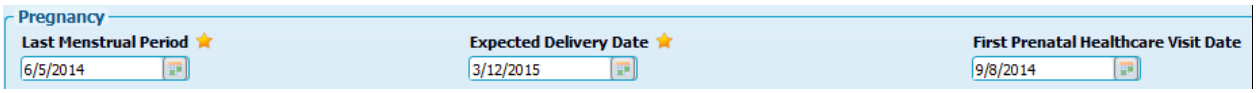
4. Under **Pregnancy**, complete the following:

a. Enter or select the **Last Menstrual Period** date.

> The system automatically calculates and enters the Expected Delivery Date upon entry of the Last Menstrual Period date and will enter the Last Menstrual Period if the Expected Delivery Date is entered.

b. Enter or select the **Expected Delivery Date**.

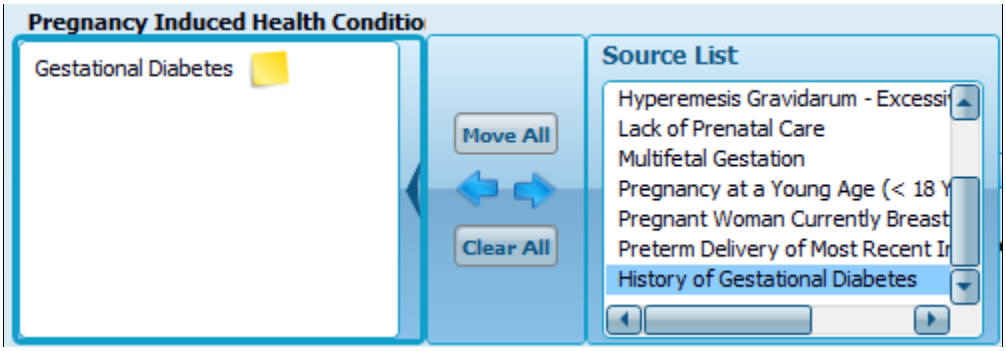
c. Enter or select the **First Prenatal Healthcare Visit Date**.



5. Under **Pregnancy**, expand following slider list boxes by clicking the arrow shown below:

a. Pregnancy Induced Health Conditions

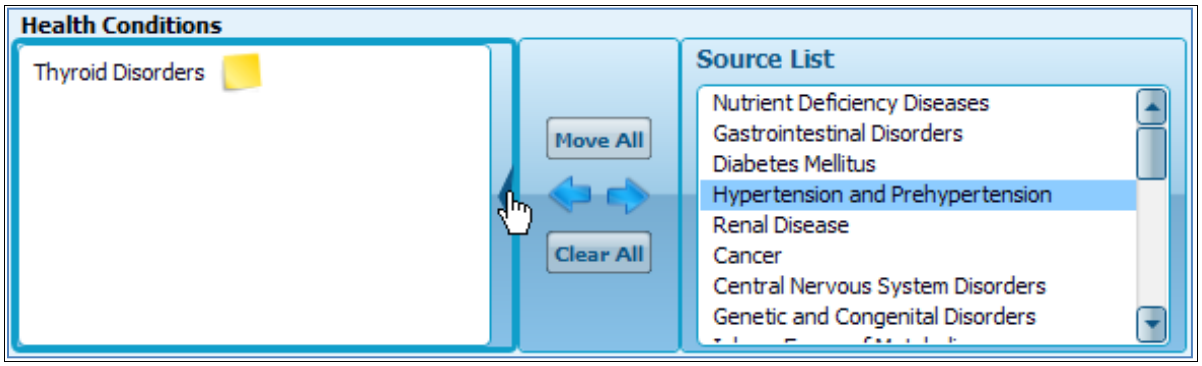
i. Use the **Left Arrow** button ( ) and **Right Arrow** button ( ) to select or unselect items from the **Source List** or double click to add or remove.



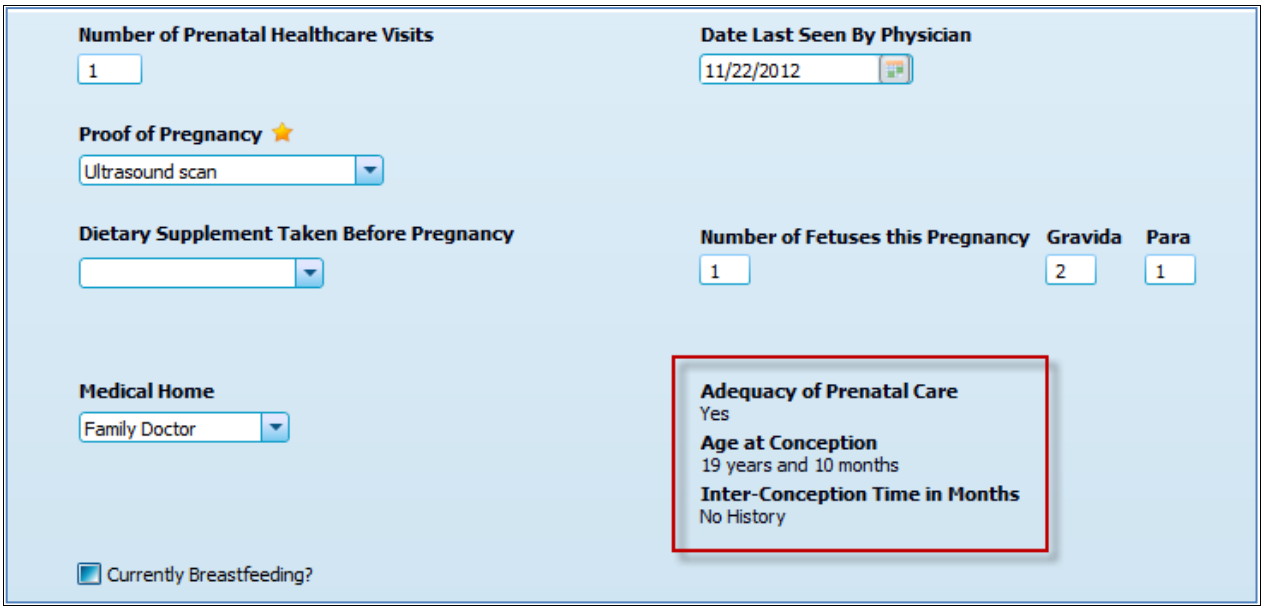
> When the arrows are used to select or unselect items from the Source List, the slider list box collapses afterwards. To keep the slider list box expanded, double click items from the Source List.

b. Health Conditions

i. Use the **Left Arrow** button ( ) and **Right Arrow** button ( ) to select or unselect items from the **Source List** or double click to add or remove.



6. Complete the remaining items within the **Pregnancy** group box.
   a. Enter the **Number of Prenatal Healthcare Visits**.
   b. Enter or select the **Date Last Seen by Physician**.
   c. Select the **Proof of Pregnancy**.
   d. Select the **Dietary Supplement Taken Before Pregnancy**, if applicable.
   e. Enter the **Number of Fetuses this Pregnancy**.
   f. Enter **Gravida**.
   g. Enter **Para**.
   h. Select the **Medical Home**.
   i. Check **Currently Breastfeeding** if the woman is breastfeeding.



Gravida indicates the number of times the woman has been pregnant regardless if the pregnancies were carried to term.

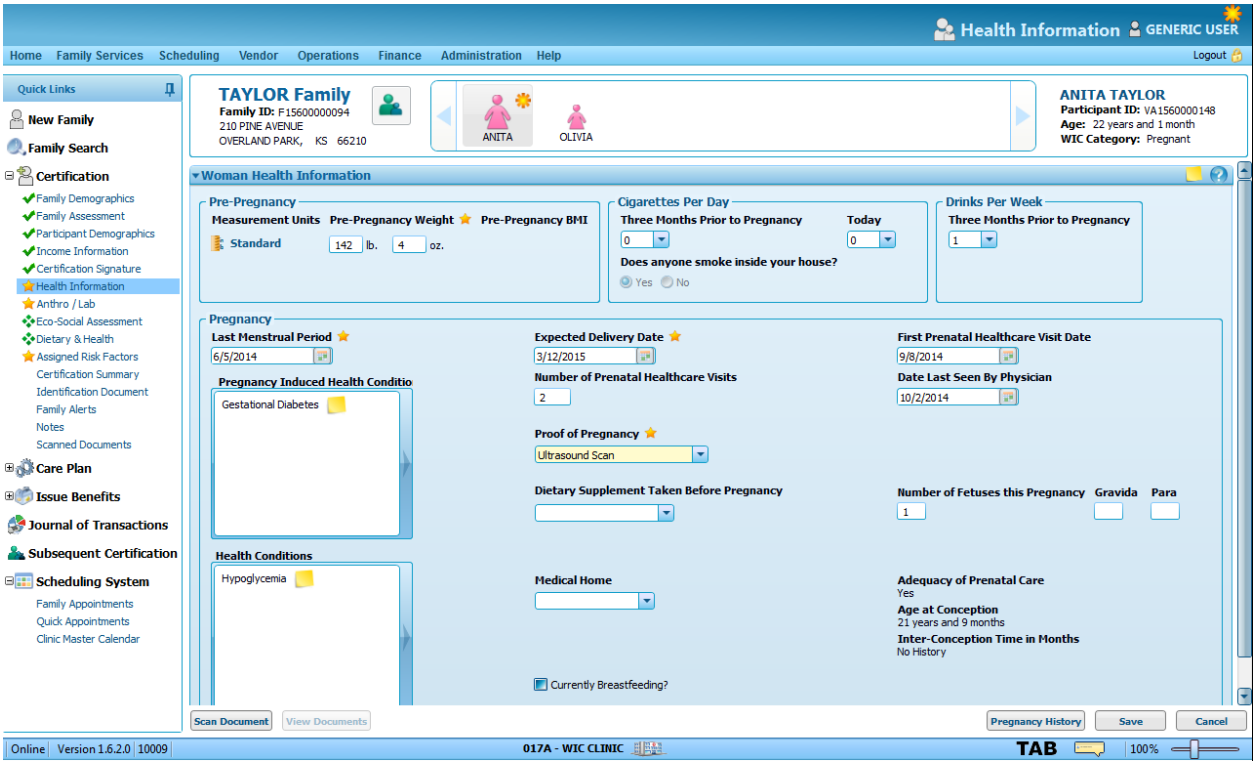
Para indicates the number of viable (>20 wks.) births.

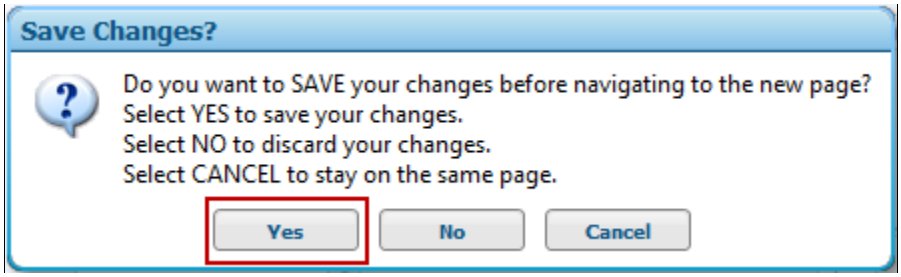
The value displayed for Adequacy of Prenatal Care (Yes or No) is determined by how many weeks gestation the woman is and the Number of Prenatal Healthcare Visits she has attended.

Age at Conception indicates the woman's age when the infant was conceived.

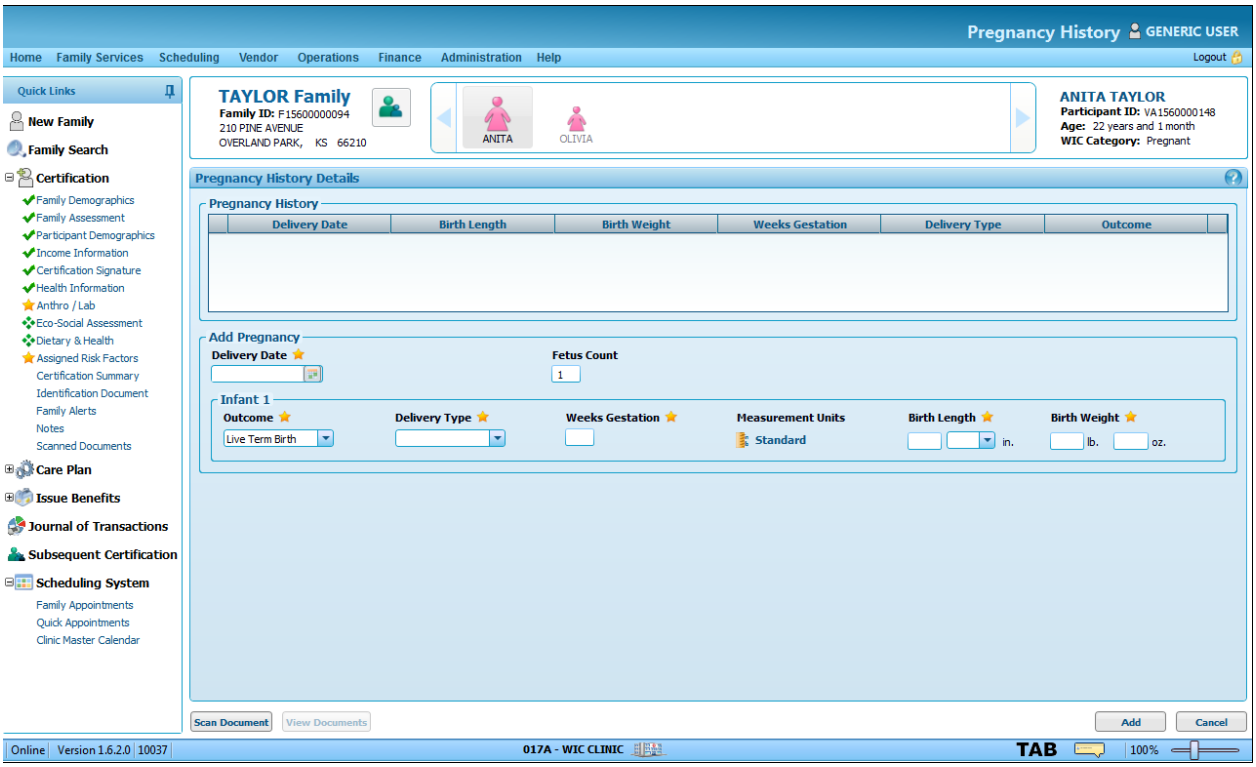
Inter-Conception Time in Months indicates how many months occurred between her last pregnancy and her current pregnancy. A value of No History displays until the Pregnancy History screen is completed (see below).

7. Click **Pregnancy History**. The **Pregnancy History** screen displays with the **Save Changes** popup.





8. Click **Yes** to save your changes prior to navigating to the new screen. The **Pregnancy History** screen displays.



a. Under **Add Pregnancy**, do the following for all previous pregnancies:

   i. Enter the **Delivery Date** of a previous birth.

   ii. Review and/or modify the **Fetus Count**.

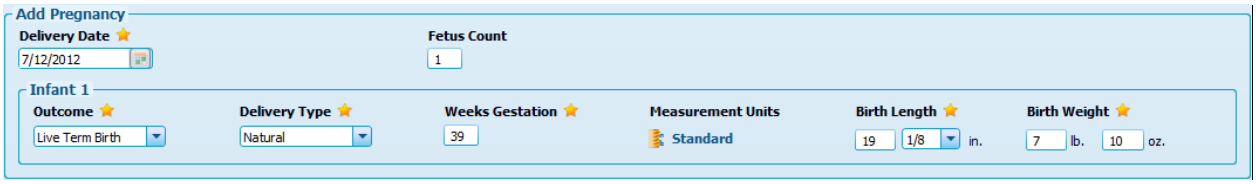
   iii. Select the **Outcome**.

   iv. Select the **Delivery Type**.

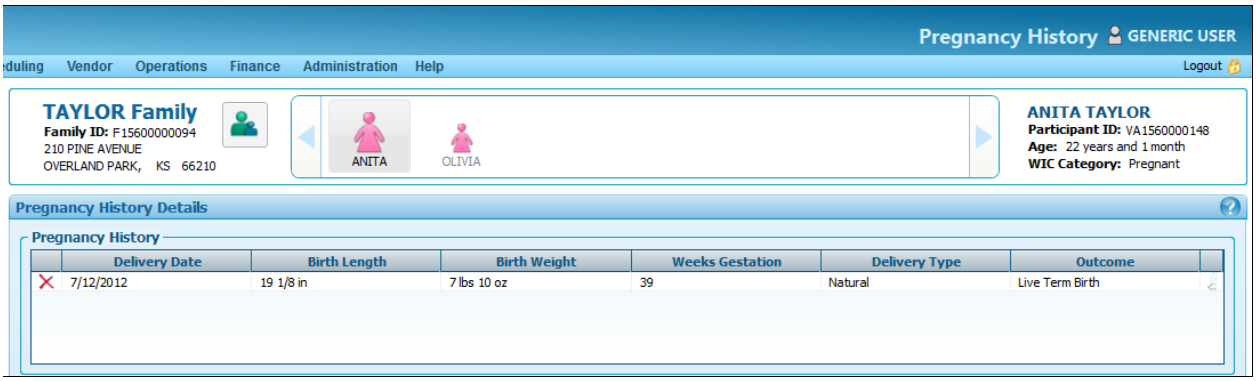
   v. Enter the **Weeks Gestation**.

   vi. Enter the **Birth Length**.

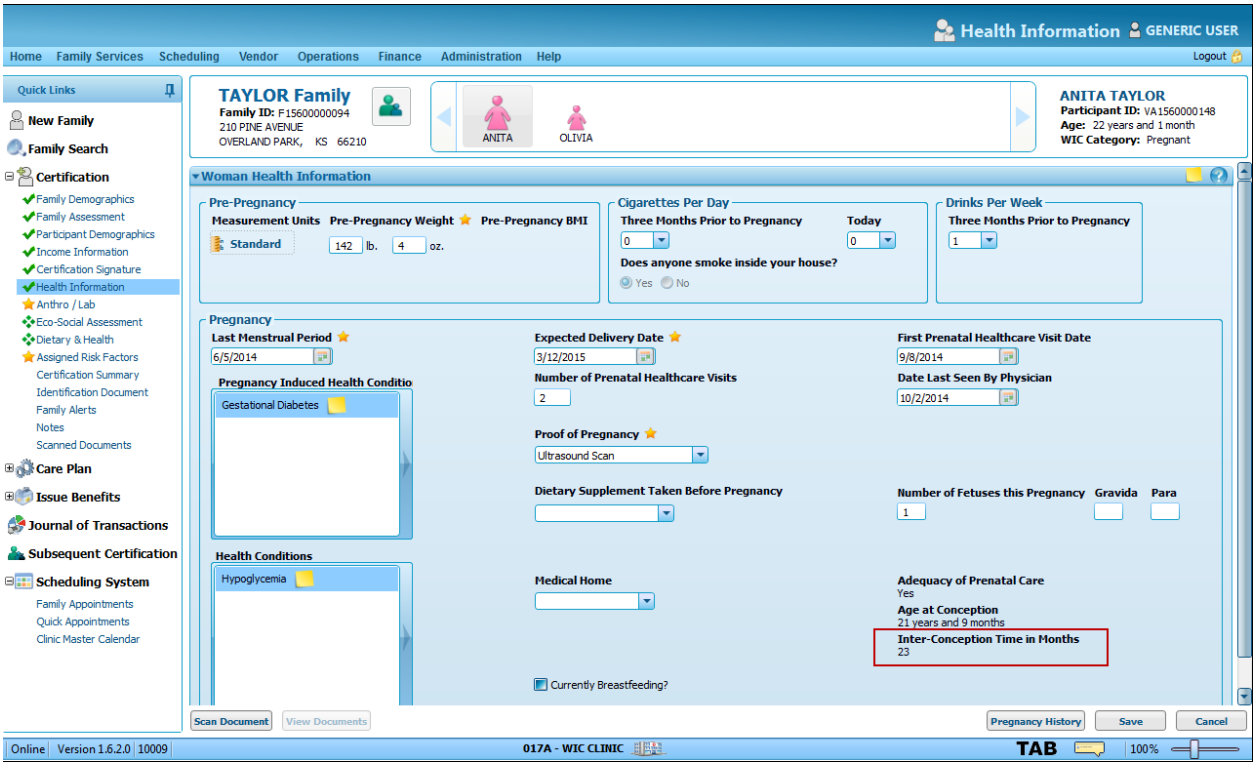
   vii. Enter the **Birth Weight**.



9. Click **Add**. A status message indicates success and the **Pregnancy History** grid refreshes to display the information.



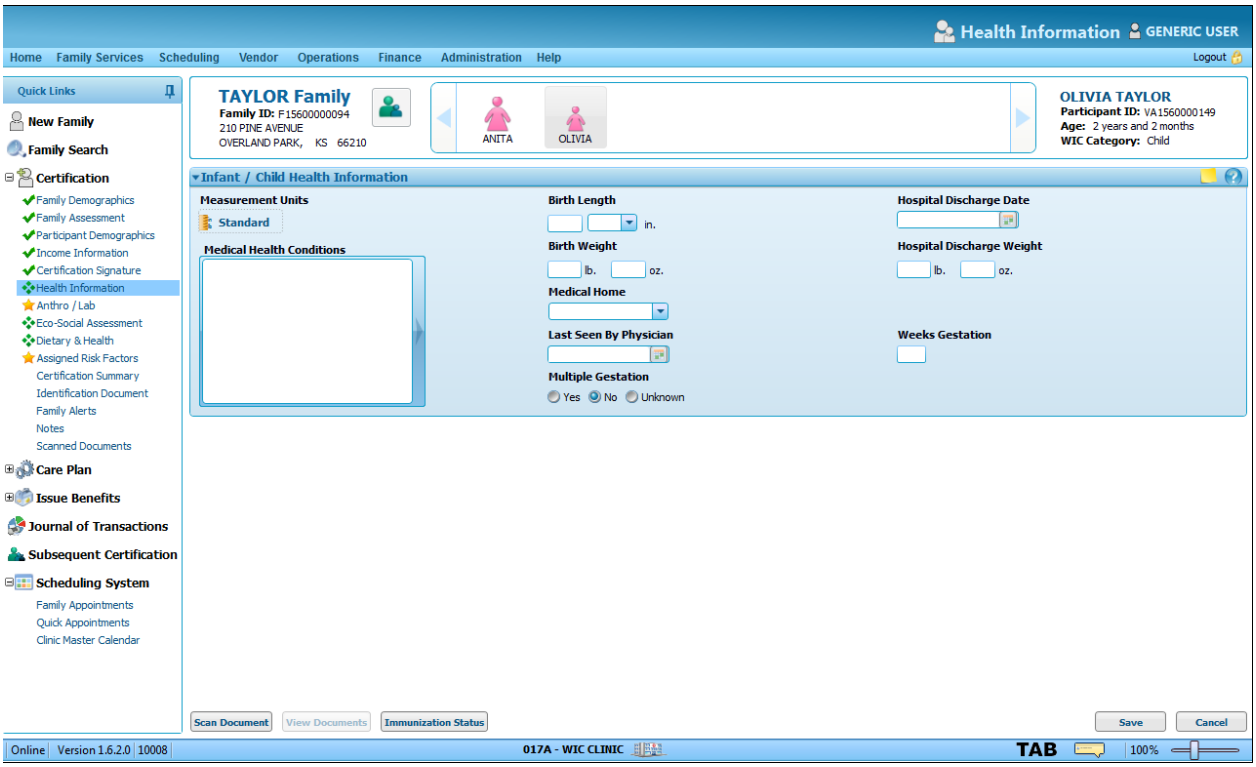
10. Click **Cancel** to return to the **Health Information** screen for the woman. The **Health Information** screen displays.



Now that the Pregnancy History has been documented, the Inter-Conception Time in Months displays a value.

It is not necessary to navigate from the Pregnancy History screen back to the woman's Health Information screen. However, for illustrative purposes, this step was completed to show the Inter-Conception Time in Months value. Instead, a user could have clicked the child's icon and completed the Health Information screen for the child (or next family member).

11. Select the child member icon within the **Family Header**. The **Health Information** screen displays for the child.



12. Under **Infant/Child Health Information**, do the following:

a. Enter the **Birth Length**.

b. Enter or select the **Hospital Discharge Date**.

c. Enter the **Birth Weight**.

d. Enter or select the **Hospital Discharge Weight**.

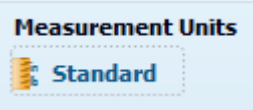
e. Select the **Medical Home**.

f. Enter of select the **Last Seen By Physician** date.

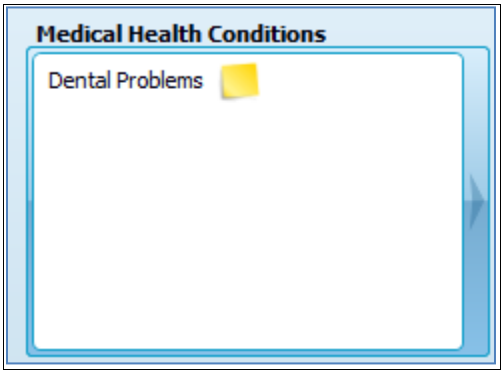
g. Enter the **Weeks Gestation**.

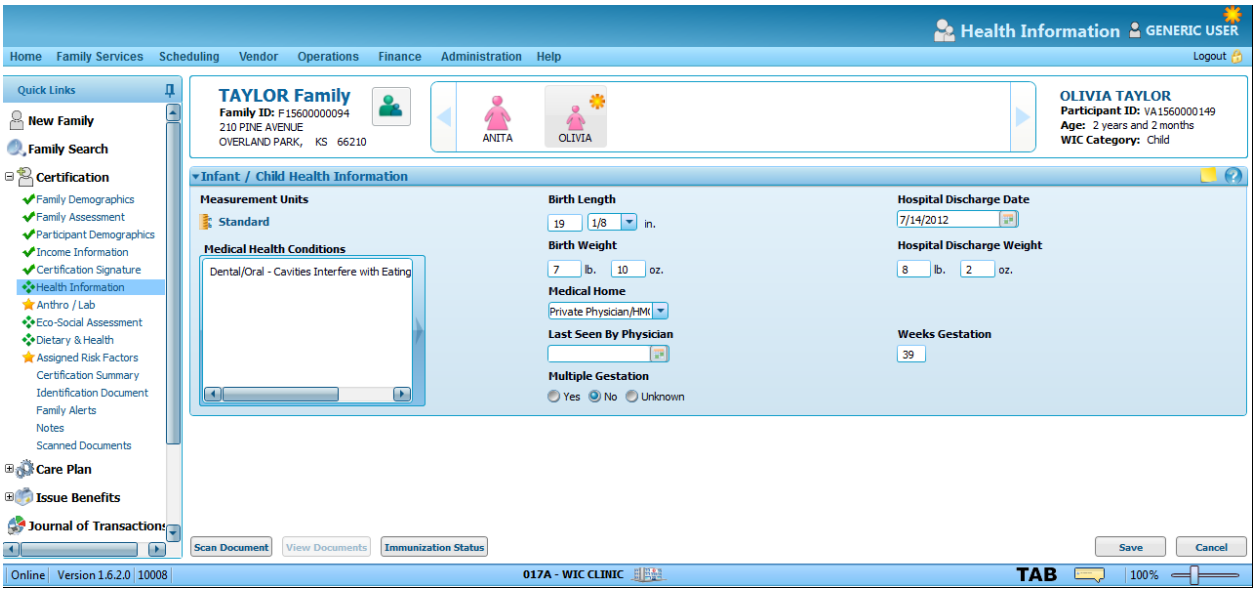
h. Select a **Multiple Gestation** option.

Click the Measurement Units link to switch between Standard and Metric values.

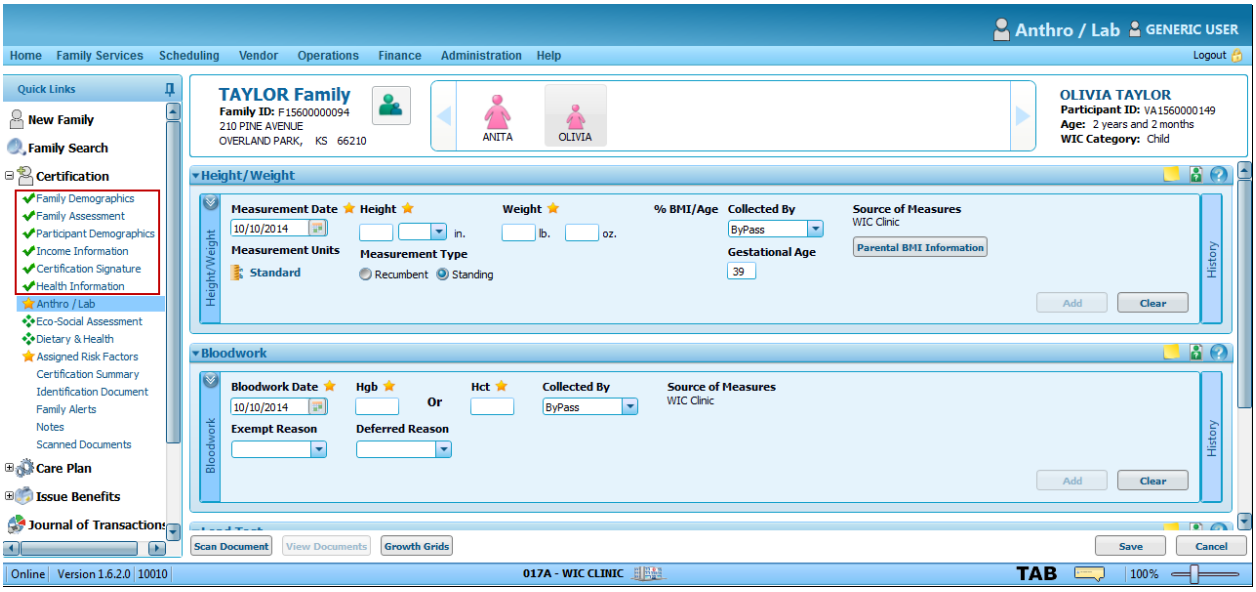


i. Complete the **Medical Health Conditions** slider list box, if applicable.





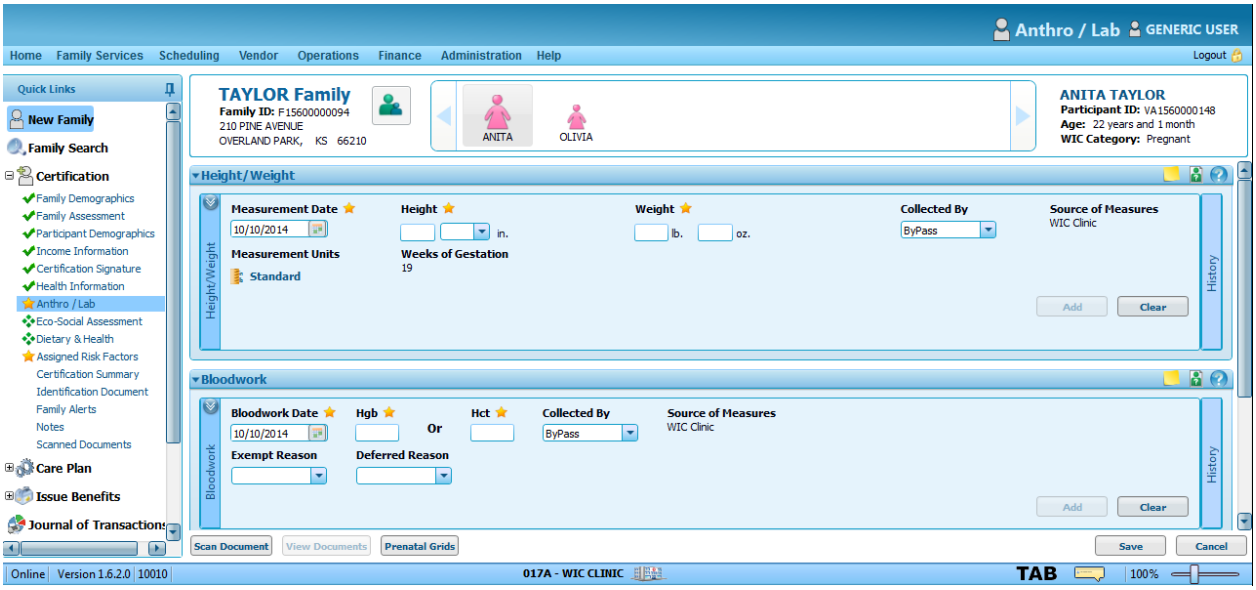
13. Click **Save**. A status message indicates success and the **Anthro/Lab** screen displays for the child.



Task G. Certifying the Family – Anthro/Lab Screen

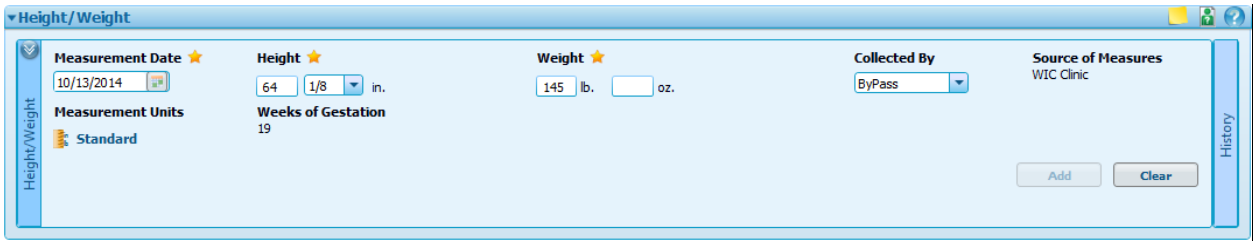
As with the Participant Demographics and Health Information screens, the Anthro/Lab screen must be completed separately for each family member.

Before beginning this task, select the woman's icon in the Family Header.

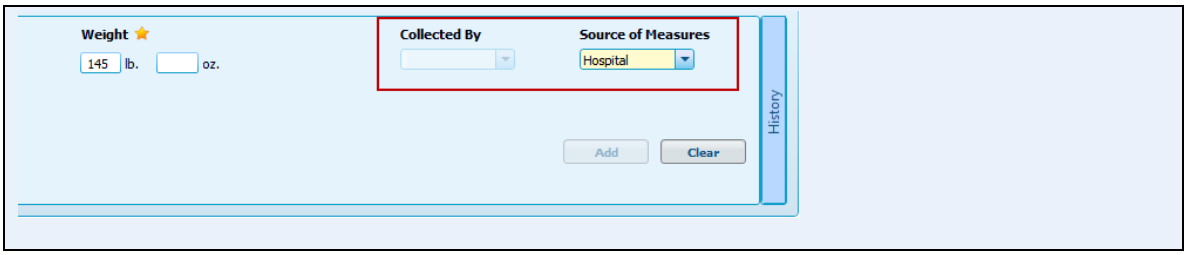


Complete the following steps to perform this task:

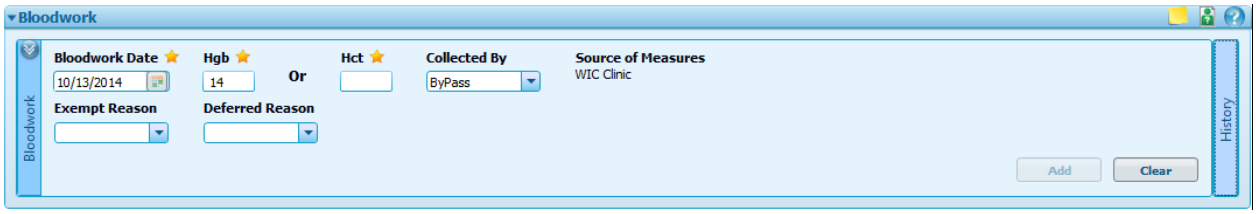
1. Complete the **Height/Weight** for the woman.



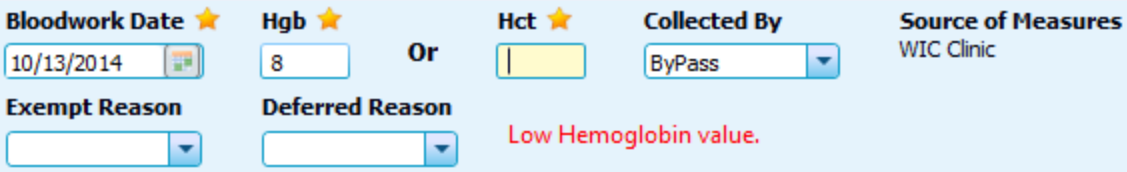
The value displayed under Source of Measures is WIC Clinic by default. To indicate the measurements were collected elsewhere, tab the cursor to the Collected By drop down list and click the Delete button on your keyboard to remove the currently displayed value. This clears the Collected By field and displays a Sources of Measures drop down list. Use this drop down list to indicate where the measurements were collected such as a Hospital or Private Physician (see example below).



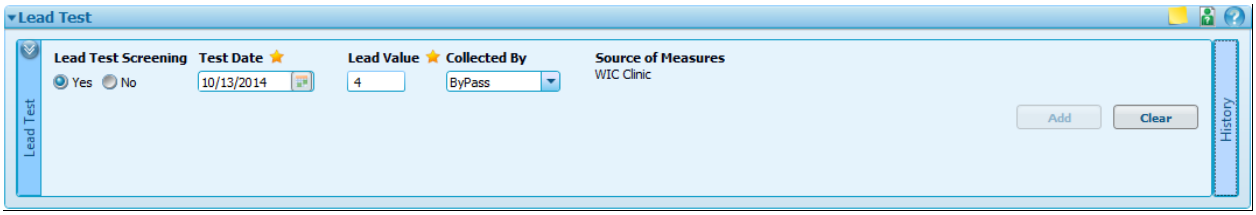
2. Complete the **Bloodwork** for the woman.



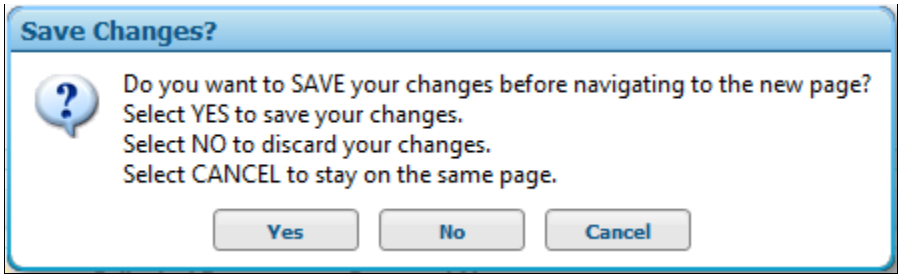
Read only information is displayed if the value is low or high. For example:



3. Complete the **Lead Test** for the woman, if applicable.



4. Click **Prenatal Grids** to view growth grids. A screen displays prompting you to save your changes.



5. Click **Yes to save the changes**. The **Growth Grids** screen displays.

The system contains the following read only reference table to support the gestational weight gain grids for pregnant women:

WeightToGestation

This table contains references to a GrowthStatisticID, the Type and the GestationInWeeks.

There is also a reference table called ctGrowthChartType that identifies each growth chart used by the application.

The system also uses the following tables that are not displayed on the Edit Reference Tables screen:

GrowthStatistic

WHOHCToAge

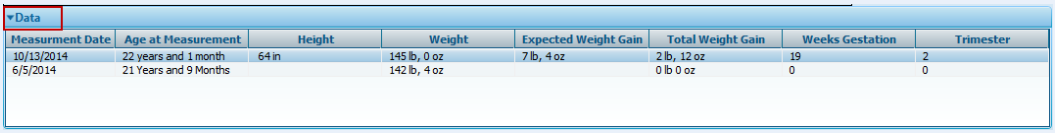
WHOLengthToAge

WHOWeightToAge

WHOWeightToLength

Use the Estimated Delivery Date drop down list, as necessary, to view growth grids based upon the woman's estimated delivery date. There may be one entry only if the woman's estimated delivery date has remained constant throughout her pregnancy.

Expand or collapse the Data section of the screen as necessary to view the values used to plot points on the growth grid.

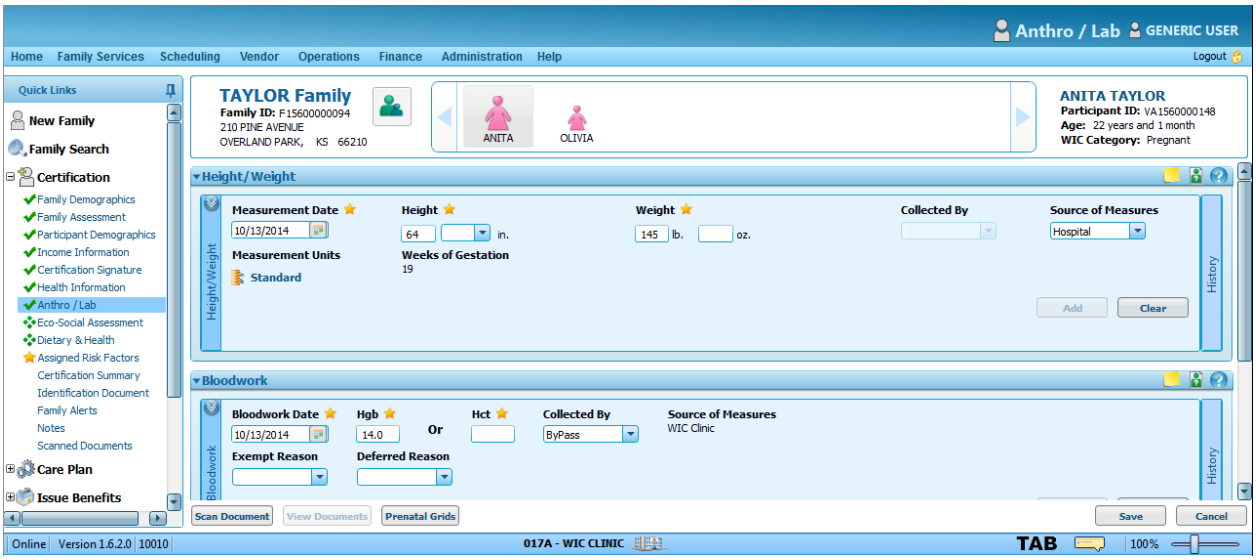


Data

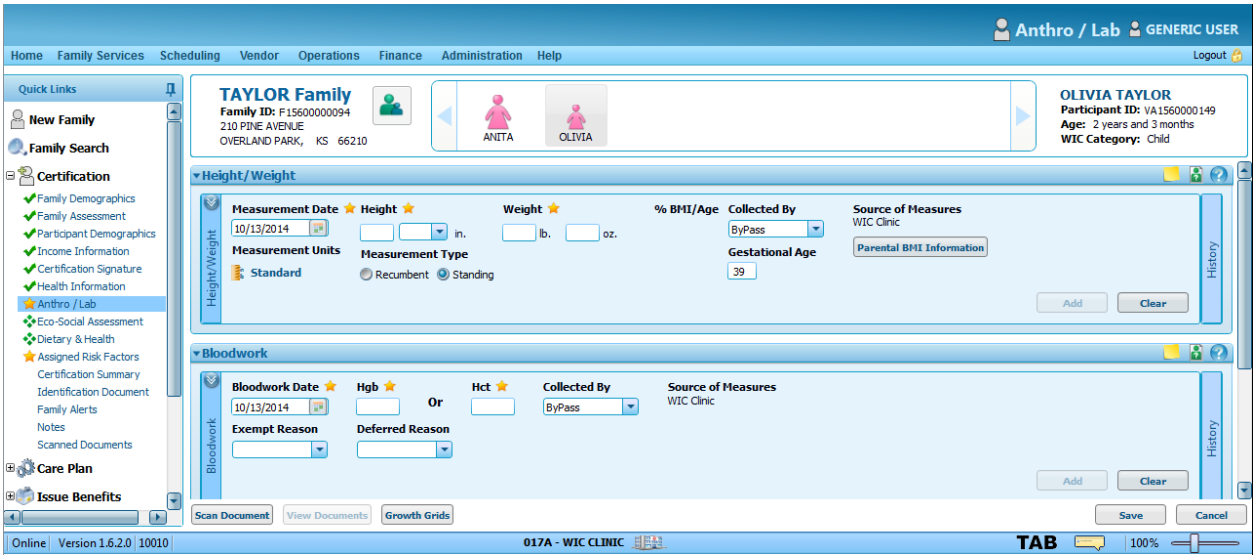
Measurment Date	Age at Measurement	Height	Weight	Expected Weight Gain	Total Weight Gain	Weeks Gestation	Trimester
10/13/2014	22 years and 1 month	64 in	145 lb, 0 oz	7 lb, 4 oz	2 lb, 12 oz	19	2
6/5/2014	21 Years and 9 Months		142 lb, 4 oz		0 lb 0 oz	0	0

Click Printer Friendly to display the growth grid in a new window better suited for printing.

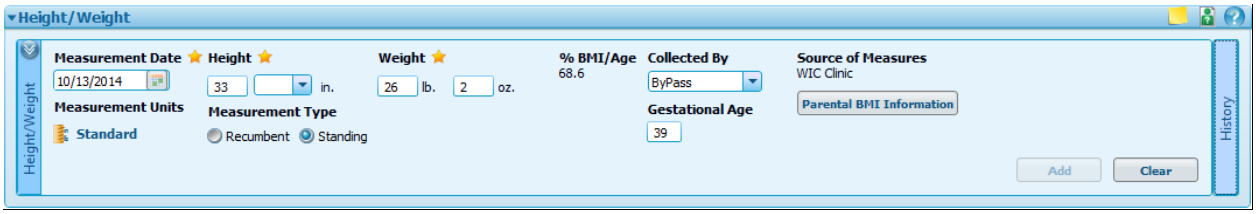
6. Click **Cancel** to dismiss the **Growth Grids** screen and to return to the **Anthro/Lab** screen.



7. Select the child member icon within the **Family Header**. The **Anthro/Lab** screen displays for the child.



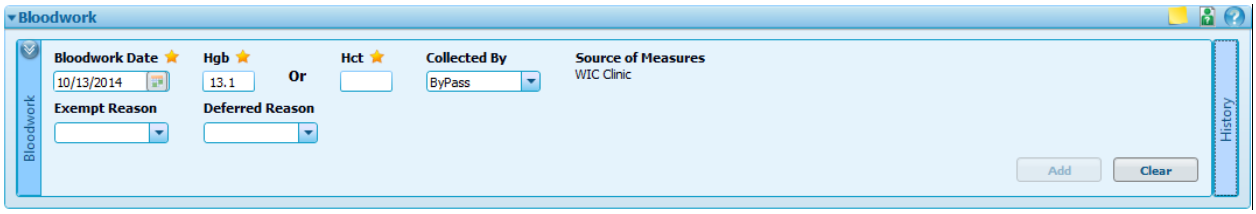
8. Complete the **Height/Weight** for the child.



A Measurement Type option is selected by default based upon the age of the child. Select Recumbent or Standing as necessary to indicate the position of the child when the measurement was collected (lying down or standing up).

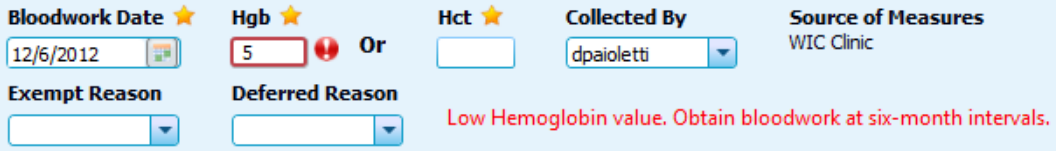
Click Parental BMI Information to document information on the child's parents.

9. Complete the **Bloodwork** for the child.

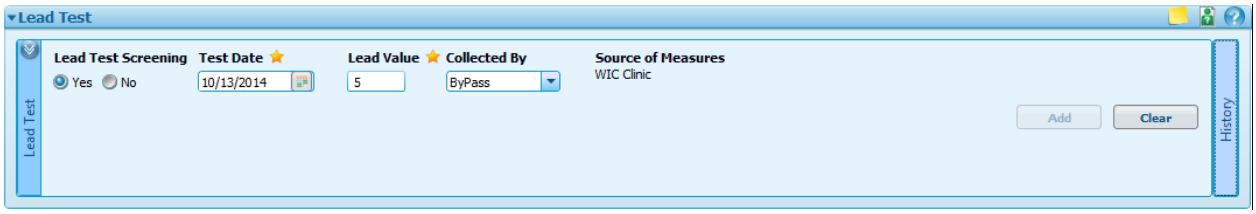


For a child between 24 and 60 months of age, bloodwork is required at certification and is to be repeated annually unless the previous hemoglobin/hematocrit test was outside of normal limits. In these cases, following the blood test performed at 24 months of age, a blood test must be performed at 6-month intervals (instead of annually) until the hemoglobin/hematocrit is within normal limits.

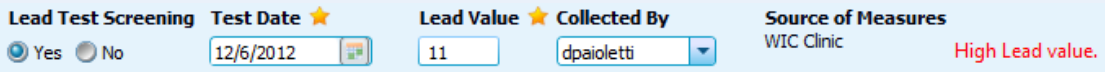
Read only information is displayed if the value is low or high. For example:



10. Complete the **Lead Test** for the child, if applicable and required in your state.



Read only information is displayed if the value is low or high. For example:



Click on the Growth Grid button to view and/or generate growth/weight gain graphs. The system will plot all recorded height, weight, and BMI on a variety of gender and age specific standard growth grids. The participants' age (or gestation weeks for pregnant woman) at the time of the measurement is calculated and used for plotting. The head circumference for age will be calculated and displays as well.

The system contains the following read only reference tables to support growth grids for infants and children:

BMIToAge

HCToAge

LengthToAge

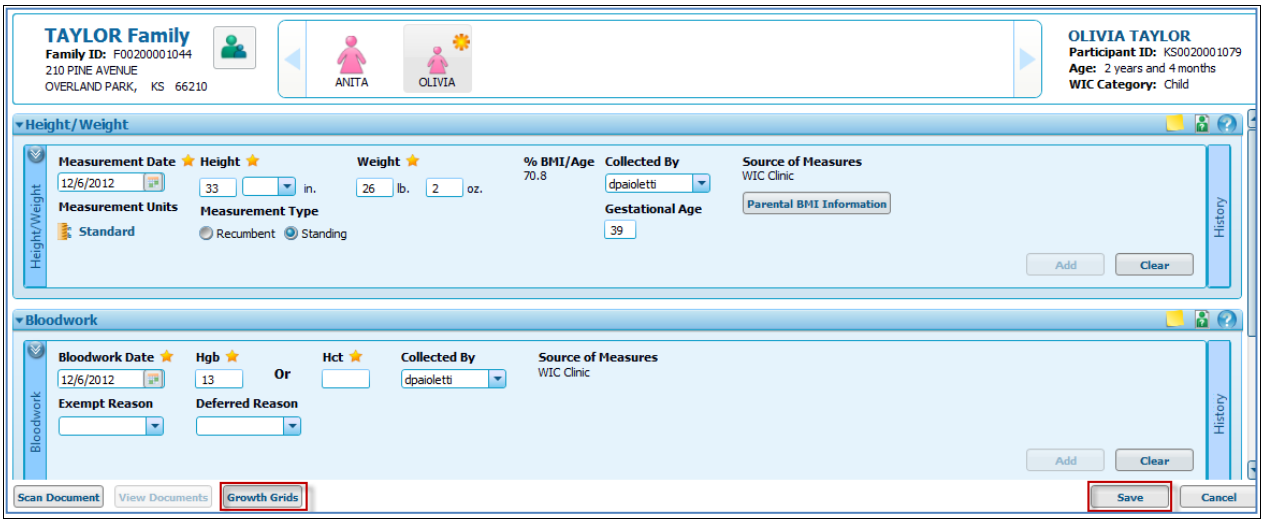
StatureToAge

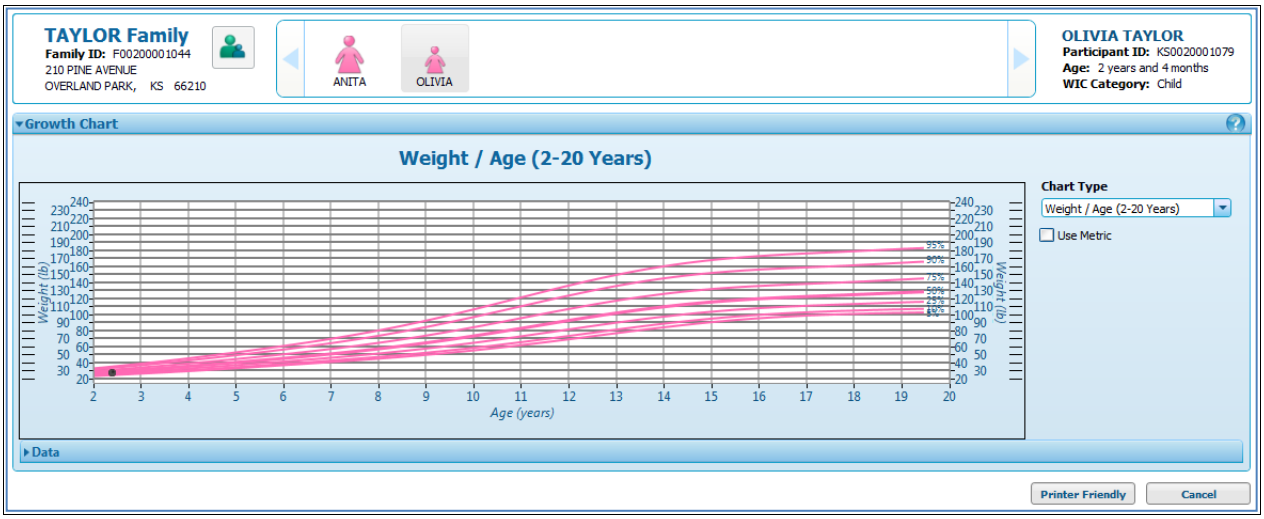
WeightToAge

WeightToLength

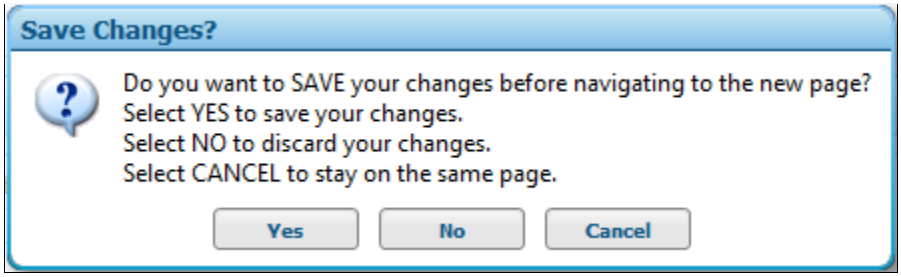
WeightToStature

The fields contained in the reference tables refer to a GrowthStatistic ID and display the Gender and the AgeInMonths.

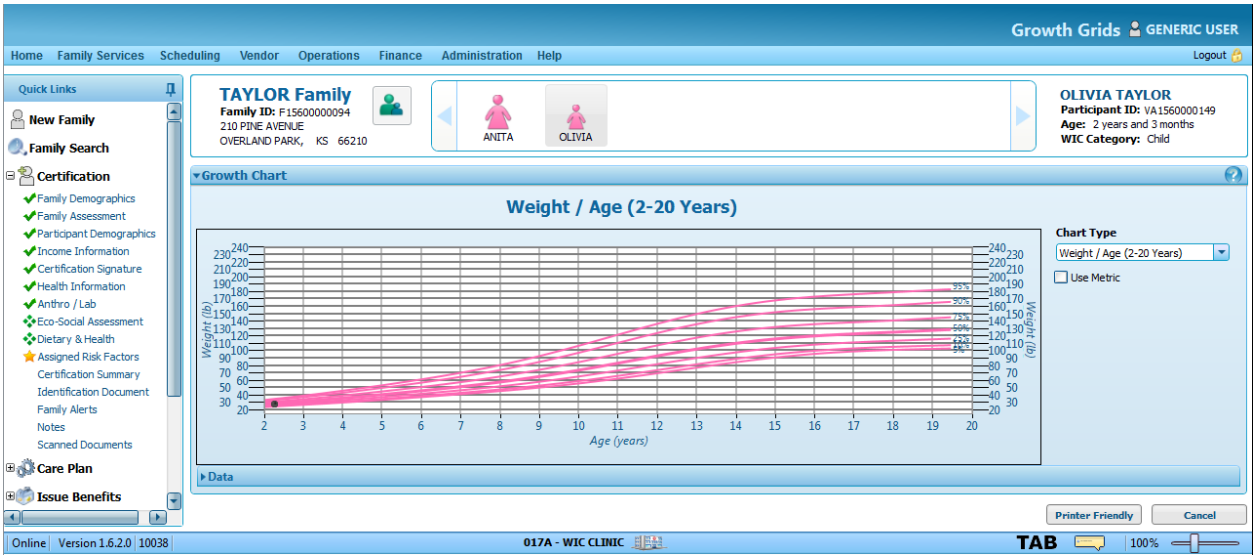




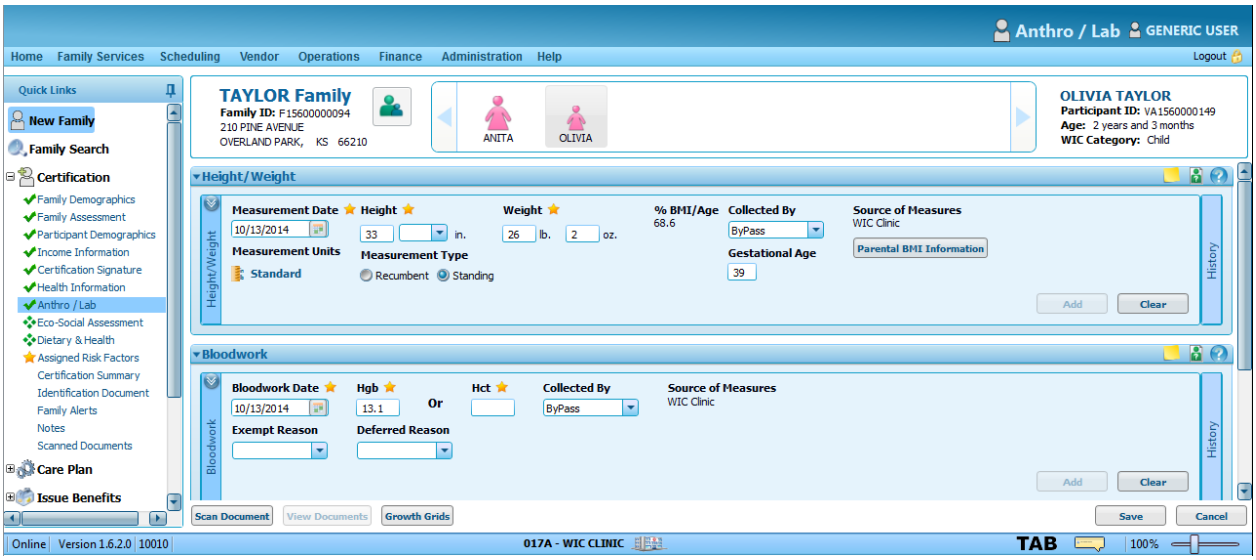
11. Click **Growth Grids** to view and/or generate growth/weight gain graphs. A screen displays prompting you to save your changes.



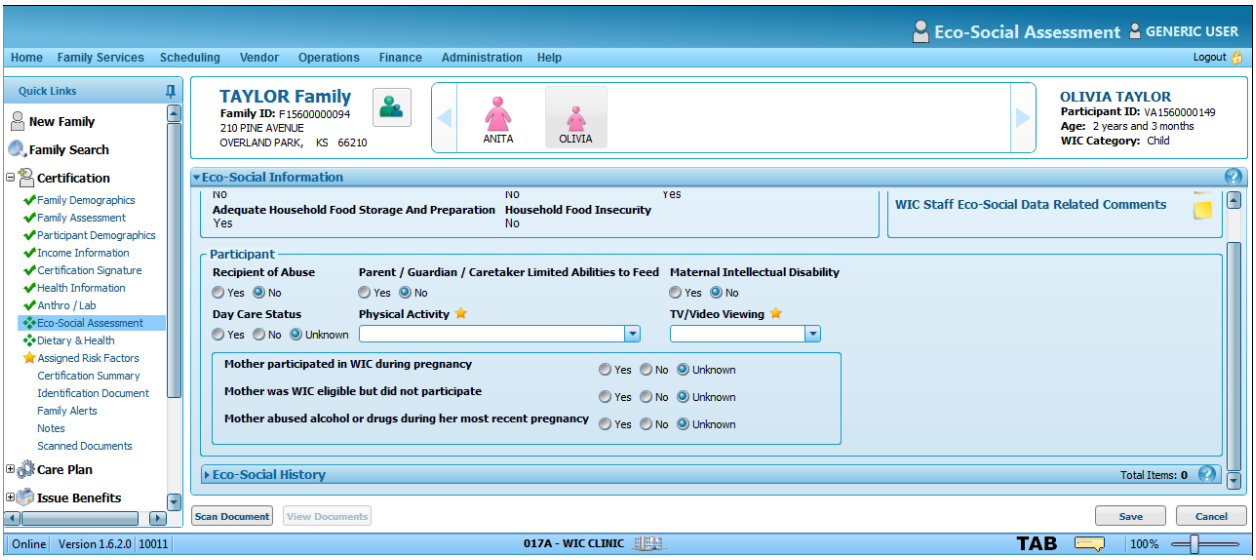
12. Click **Yes** to save your changes. The **Growth Grids** screen displays.



13. Click **Cancel** to dismiss the **Growth Grids** screen and to return to the **Anthro/Lab** screen. The **Anthro/Lab** screen displays.



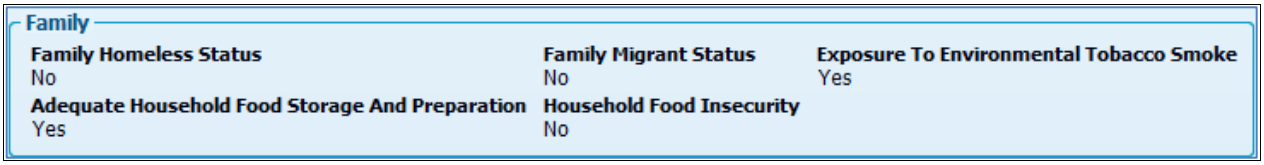
14. Click **Save**. A status message displays indicating success and the **Eco-Social Assessment** screen displays.



Task H. Certifying the Family – Eco-Social Assessment Screen

If required by your state, the **Eco-Social Assessmen**t screen must be completed separately for each family member because some risk factors are triggered by the values entered/selected on this screen. Select the child member icon within the family header.

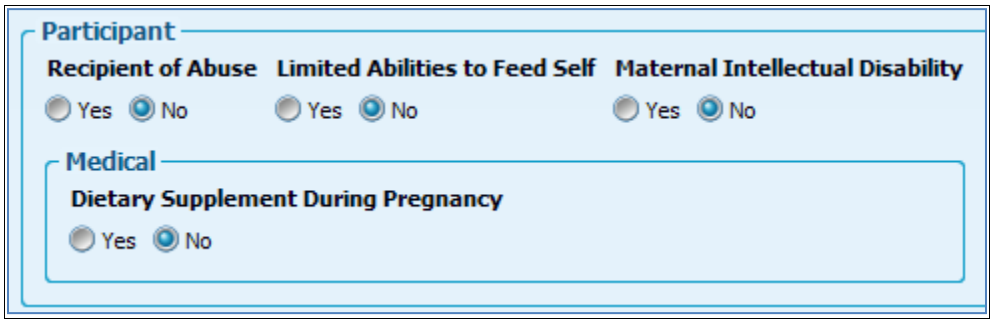
> The information displayed in the Family section under Eco-Social Information is View Only. The data is retrieved from the Family Demographics and Family Assessment screens during Certification. If editing is required, the user will make the changes on either the Family Demographics or Family Assessment screen, which will then display in the Family section.



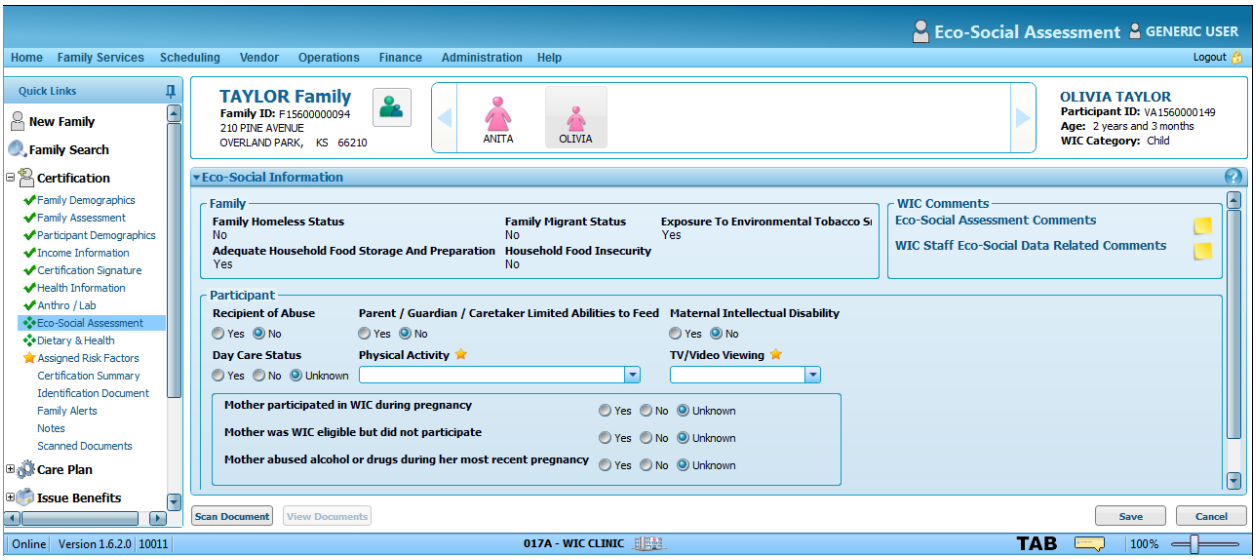
Complete the following steps to perform this task:

1. Complete the **WIC Comments** section for the woman, if applicable.

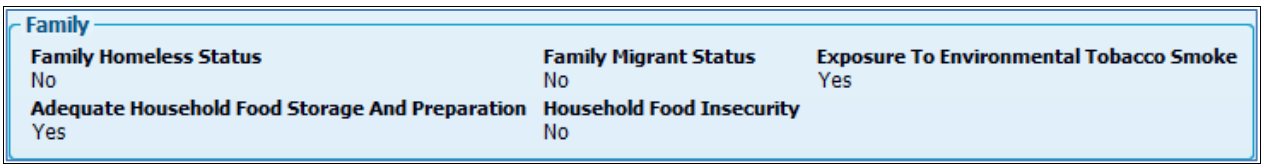
2. Edit the **Participant** section if applicable. The information, which displays on the **Participant** section, is retrieved from the **Family Assessment** screen.



3. Select the child member icon within the **Family Header**. The **Eco-Social Assessment** screen displays for the child.



The information displayed in the Family section under Eco-Social Information is View Only. The data is retrieved from the Family Demographics and Family Assessment screens during Certification. If editing is required, the user will make the changes on either the Family Demographics or Family Assessment screen, which will display in the Family section seen below.



4. Complete the **WIC Comments** section for the child if applicable.

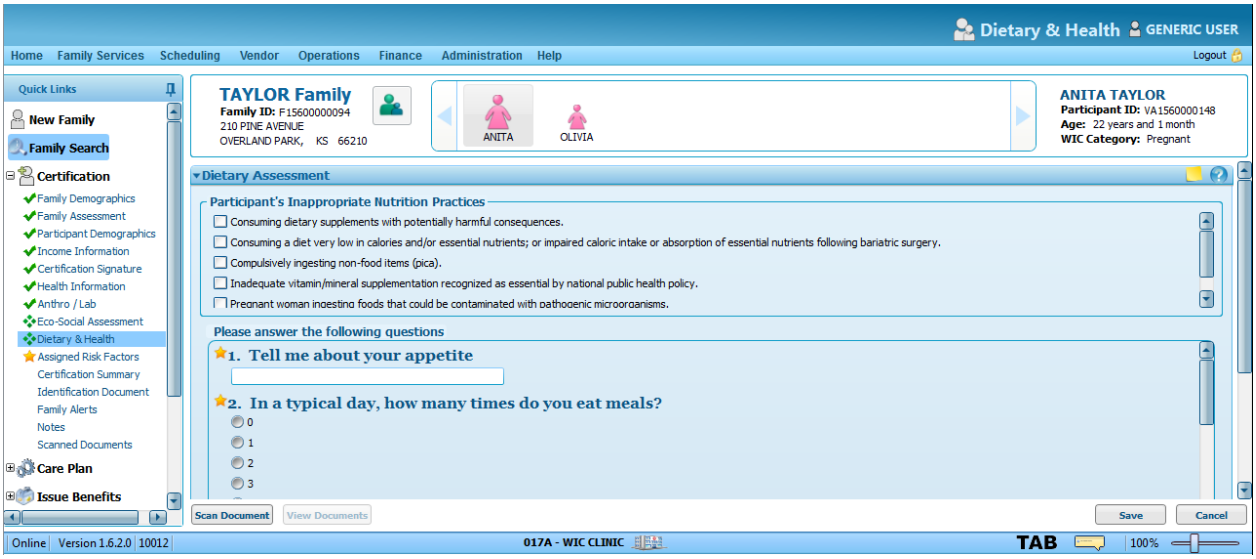
5. Complete the **Participant** section for the child.

6. Click **Save**. A status message displays indicating success and you are navigated to the next screen.

Task I. Certifying the Family – Dietary & Health Screen

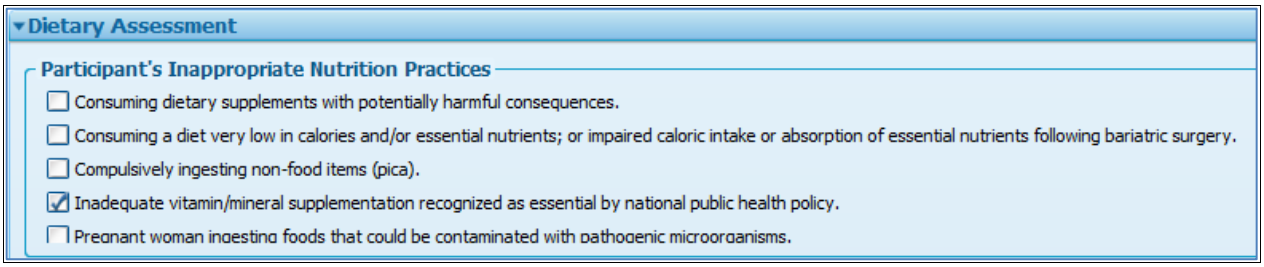
Complete the following steps to perform this task:

1. Select the woman's icon in the **Family Header**.

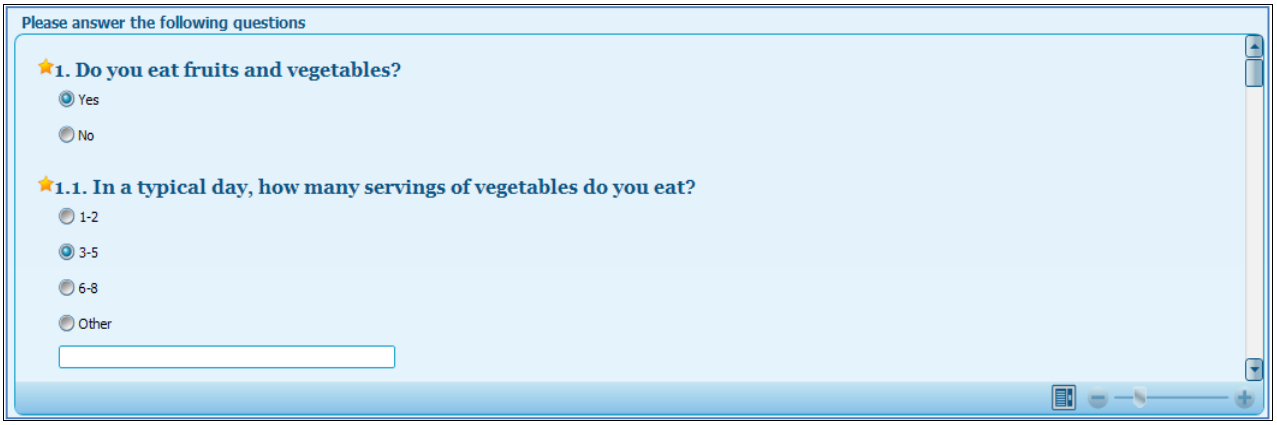


If no changes were made on the previous screen for the woman, the Eco-Social Assessment screen, then it is possible that a green check mark does not display next to the Eco-Social Assessment quick link. Because an icon ( ) indicates the information is not required to complete a certification attempt, it is acceptable for there not to be green check mark next to the link.

2. Complete the **Participant's Inappropriate Nutrition Practices** section for the woman.

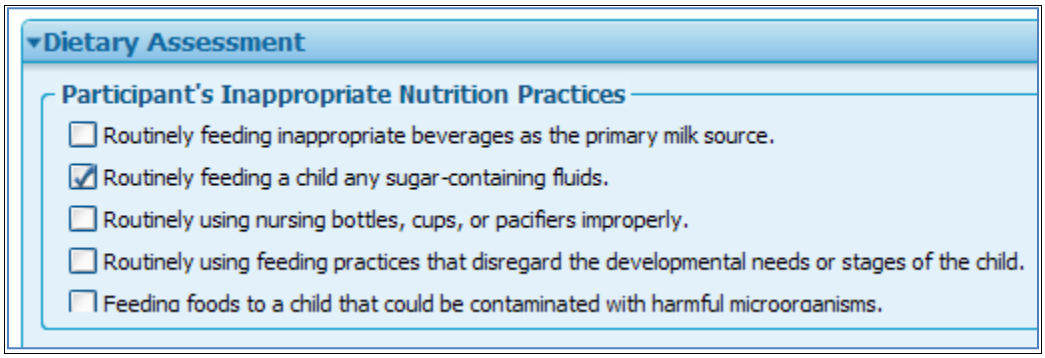


3. Complete the **Please answer the following questions** section for the woman. (Answers may prompt risk factors if your system is configured to do so.)

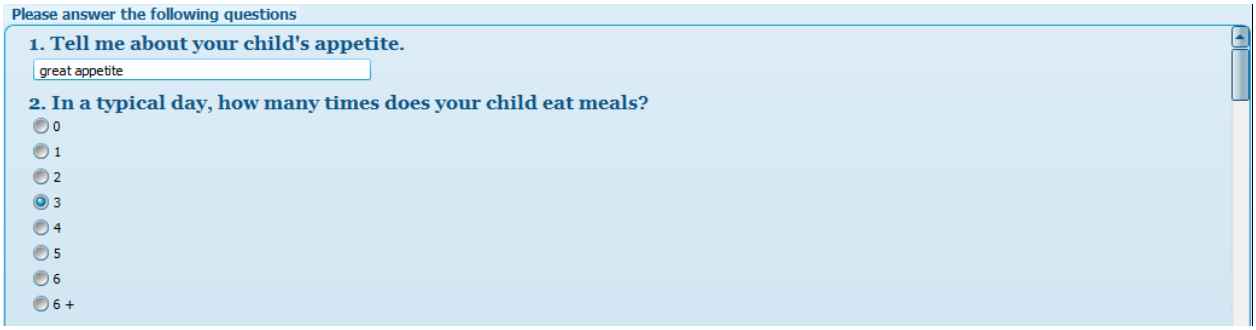


4. Select the child member icon within the **Family Header**. The **Dietary & Health** screen displays for the child.

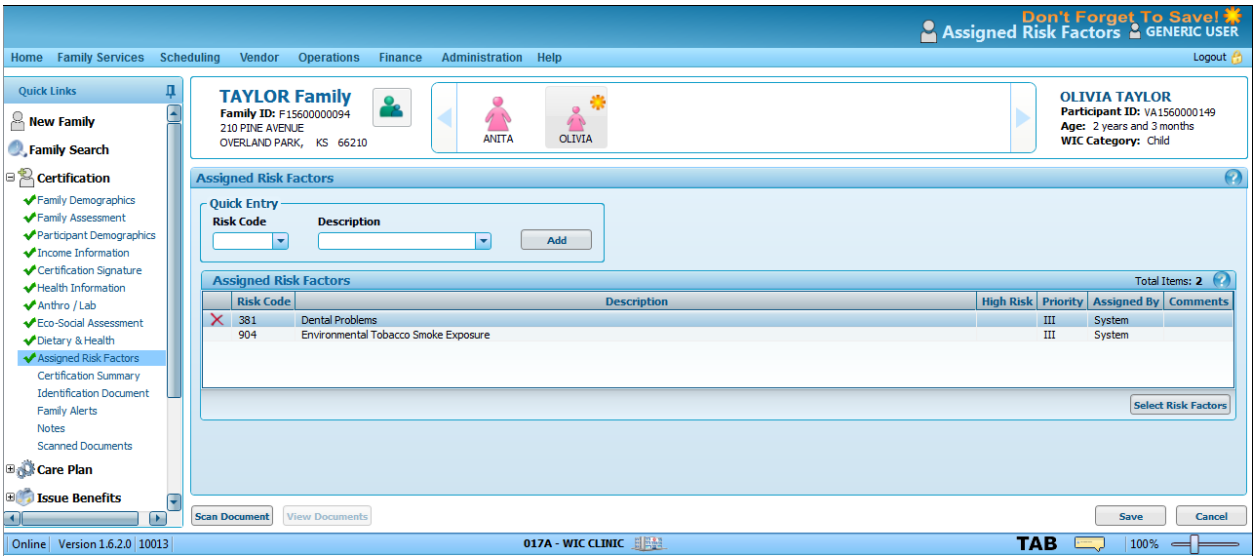
5. Complete the **Participant's Inappropriate Nutrition Practices** section for the child.



6. Complete the **Please answer the following questions** section for the child.



7. Click **Save**. A status message displays indicating success and the **Assigned Risk Factors** screen displays.

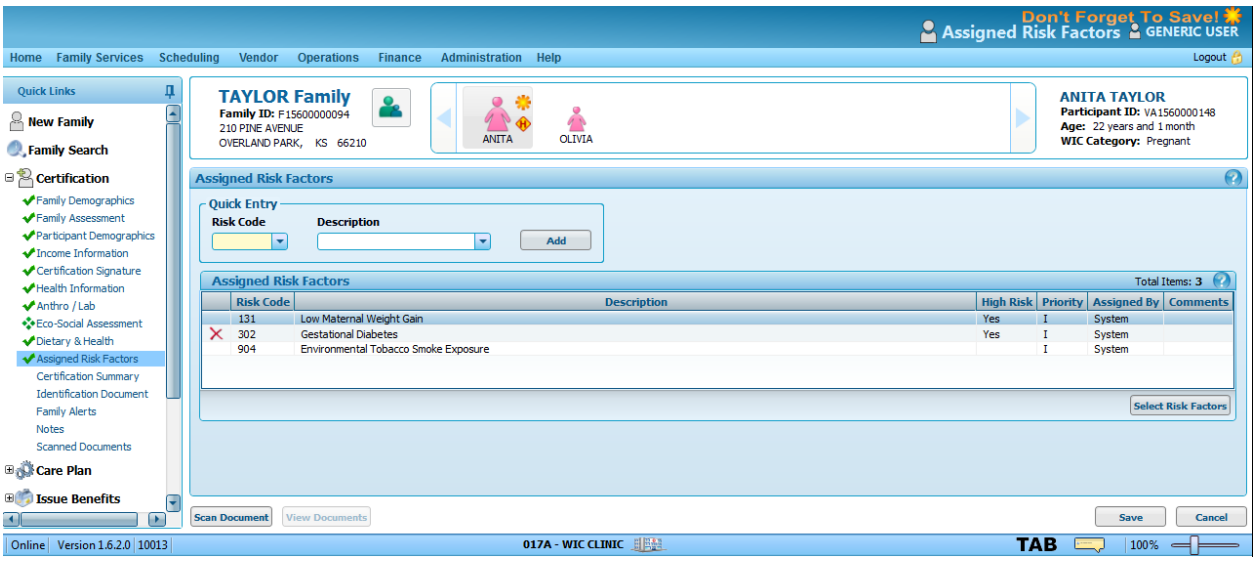


Task J. Certifying the Family – Assigned Risk Factors Screen

As with the **Participant Demographics**, **Health Information**, **Anthro/Lab**, **Eco-Social Assessment**, and the **Dietary & Health** screen, the **Assigned Risk Factors** screen must be completed separately for each family member.

Complete the following steps to perform this task:

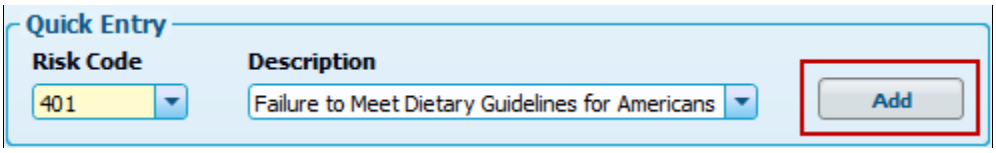
1. Select the woman member icon in the **Family Header**.



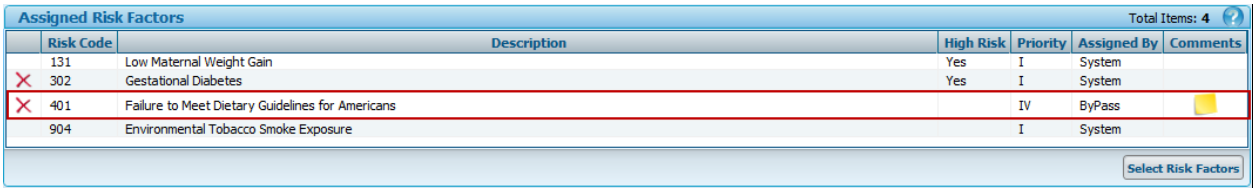
2. Complete the **Assigned Risk Factors** screen for the woman by doing one or more of the following:

> The system assigns certain risk factors automatically, as applicable. The options below illustrate a couple of ways that CPAs can manually assign risk factors. It may not be necessary to assign any additional risk factors. As the CPA, use your judgment to decide when additional (CPA assigned) risk factors are to be added.

a. Select a **Risk Code** or a **Description**, as necessary.

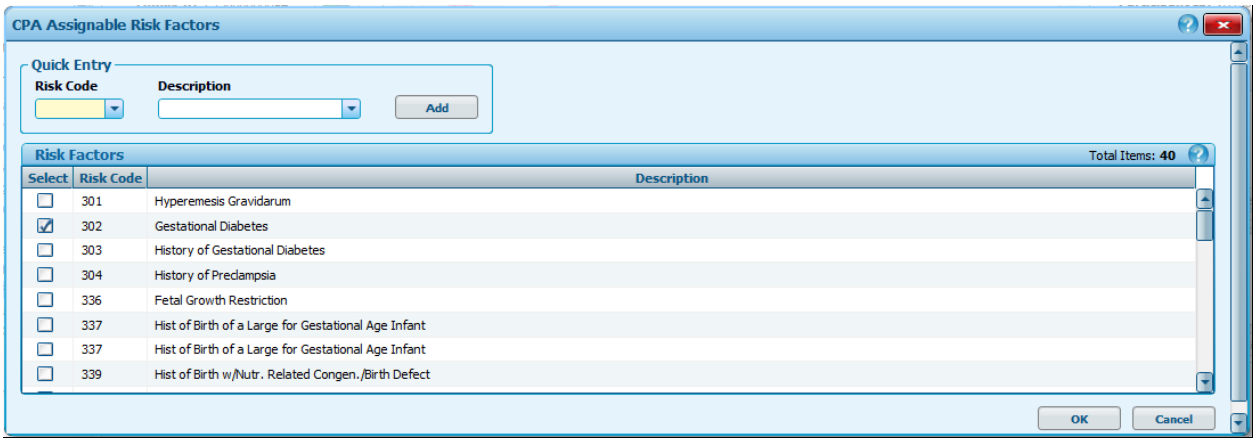


b. Click **Add**. The selected **Risk Factor/Description** displays on the **Assigned Risk Factors** grid.

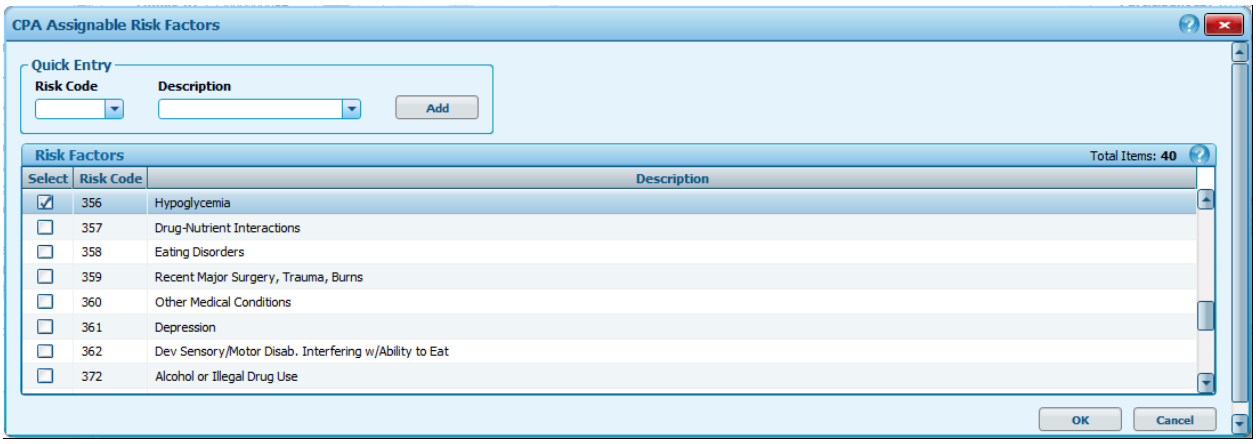


Within the Assigned Risk Factors grid, under Assigned By, the system displays whether the risk factor is assigned by the system or the user.

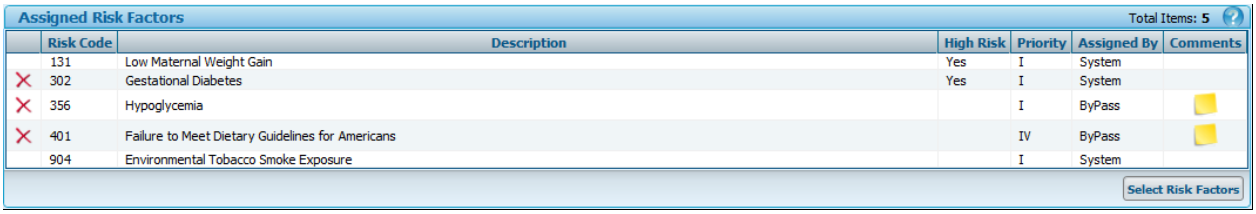
c. Click **Select Risk Factors**. The **CPA Assignable Risk Factors** screen displays.



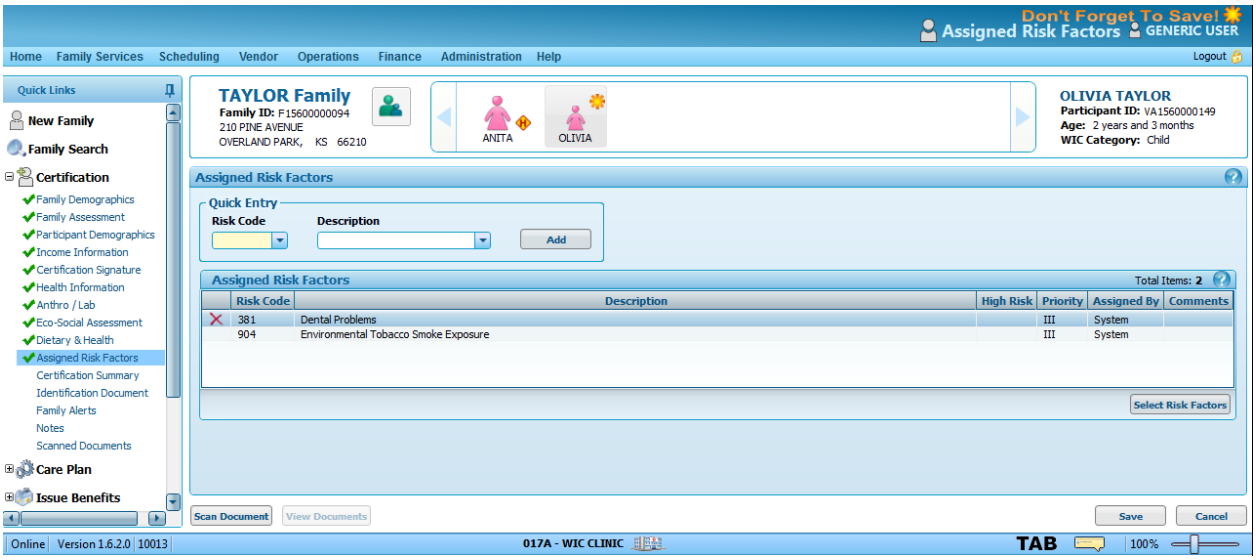
d. Select all applicable risk factors from within the **Risk Factors** grid.



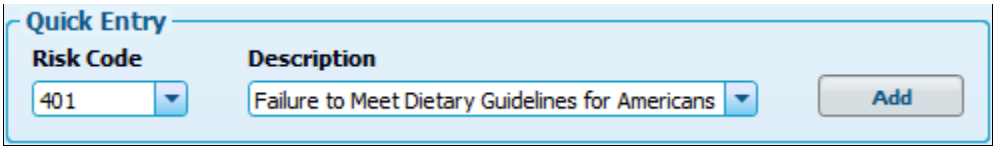
3. Click **OK**. The **Risk Factors** screen displays and the **Assigned Risk Factors** grid is updated.



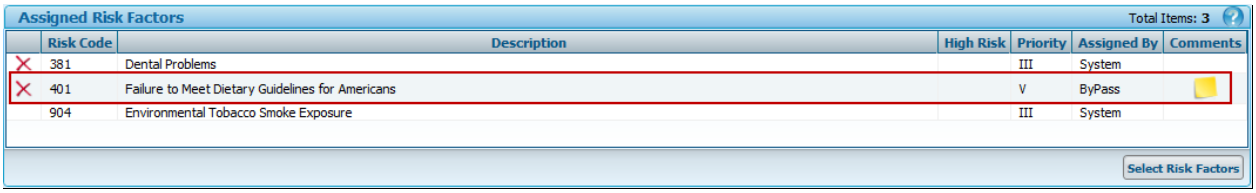
4. Select the child member icon within the **Family Header**. The **Assigned Risk Factors** screen displays for the child.



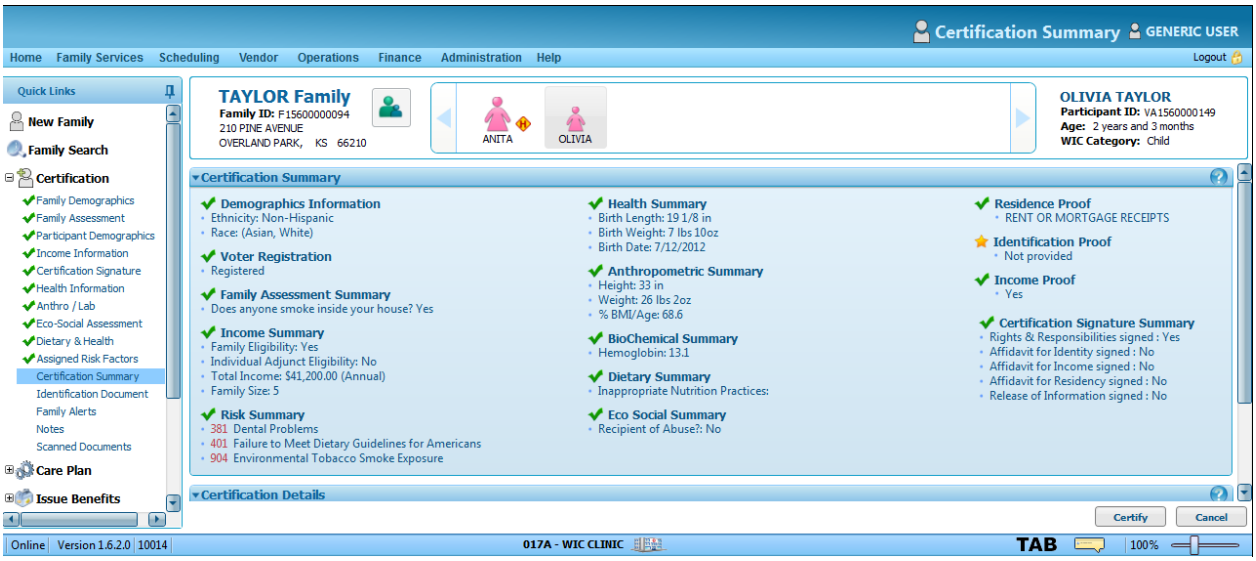
5. Complete the **Assigned Risk Factors** screen for the child. For example, user the **Quick Entry** drop-down menu to select a risk code.



6. Click the **Add** button to add the selected risk code to the **Assigned Risk Factors** grid.



7. Click **Save**. A status message displays indicating success and the **Certification Signature** screen displays.



Task K. Certifying the Family – Certification Summary Screen

The **Certification Summary** screen displays a summary of the entire certification process. Under the **Certification Summary** section, each screen of the **Certification** process is represented along with information specific to each screen. In addition, the **Certification Summary** screen indicates the completion status of each screen. A green **Checkmark** icon (✔) indicates the screen has been completed while the **Required Information** icon (★) indicates a required screen that has not been completed.

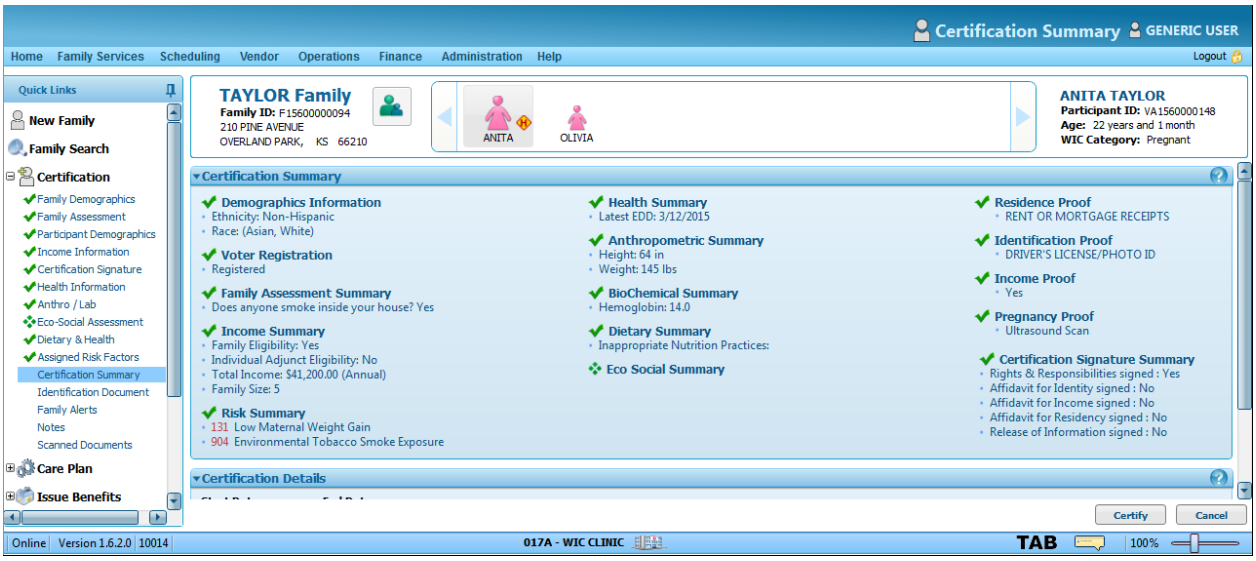
Under **Certification Details**, information such as the **Start Date**, **End Date**, **Priority Level**, and a **High Risk** indicator (H) displays for each member.

Review the member's **Certification Summary** screen for accuracy and completeness.

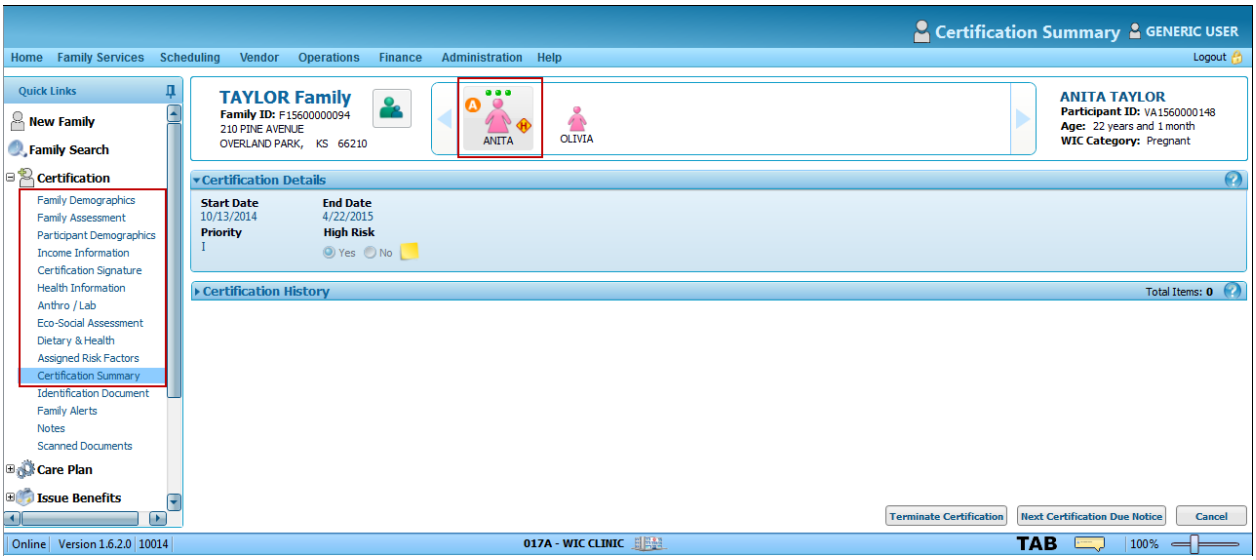
> If Certification information is missing or incomplete, select the desired screen name displayed under Quick Links to return to the screen and make changes as necessary. Return to the Certification Summary screen when you are ready to complete the Certification process.

Complete the following steps to perform this task:

1. Select the woman member icon in the **Family Header**.

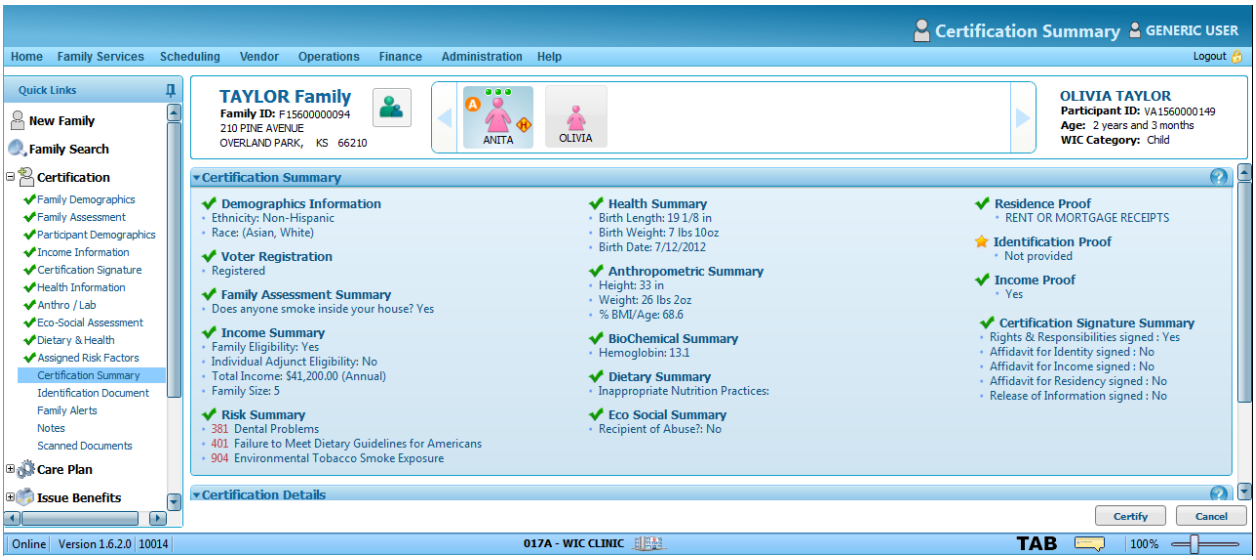


2. Click **Certify** to complete the **Certification** process for the woman. A status message indicates success and the **Certification Summary** refreshes.



The green Checkmark icon (✔) next to each link has been removed and the Active Certification Indicator (A) displays on the member's icon in the Family Header. This Certification process is complete for the member.

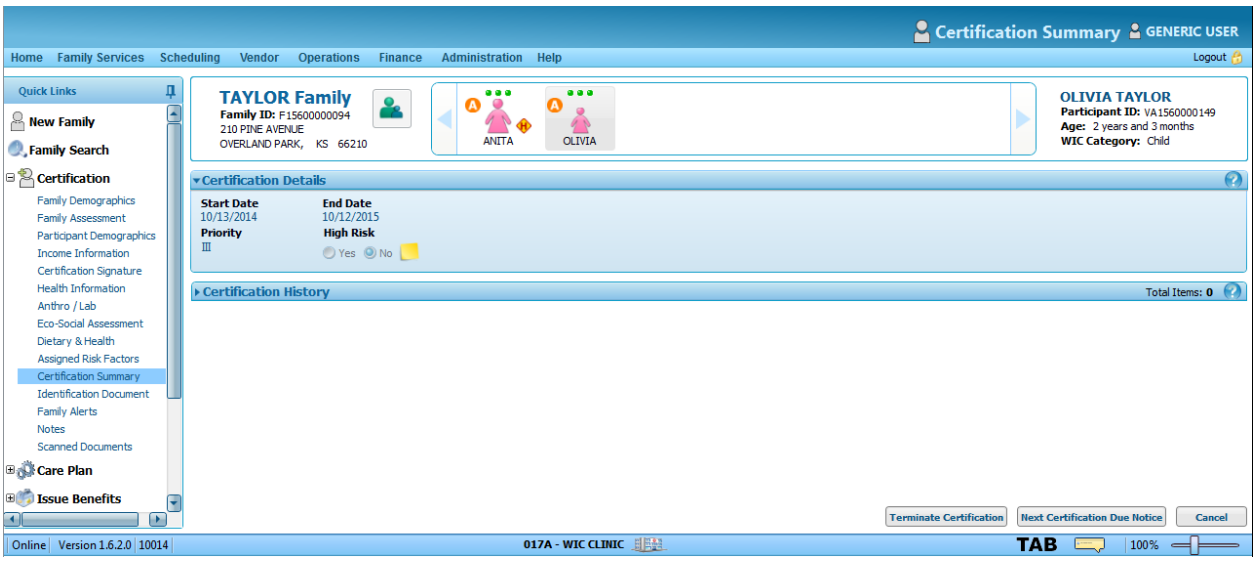
3. Select the child member icon within the family header. The **Certification Summary** screen displays for the child.



Take a moment to review the member's **Certification Summary** screen for accuracy and completeness. Once you are satisfied that the information displayed is accurate and complete, you will complete the next step.

If Certification information is missing or incomplete, simply click the desired screen link to return to the screen and make changes as necessary. Return to the Certification Summary screen when you are ready to complete the Certification. In the example above, the child's Identification Proof is missing. Click the Identification Proof link, document the desired proof, and save the changes. You are navigated back to the Certification Summary screen.

4. Click **Certify** to complete the **Certification** process for the child. A status message indicates success and the **Certification Summary** screen displays.



Congratulations!

You have successfully completed the **Certifying a Pregnant Woman and Her Two-year Old Child** process.

Certifying a Non-Breastfeeding Woman and Infant

Prior to this point in the process, you have established the family record in the system. Each family member displays as an icon at the top of the screen within the family header, and the woman's icon is selected.

The next task in the process is to certify each family member. This task requires the user to complete a number of system screens. You will need to complete several screens once for the entire family while other screens are completed individually for each member.

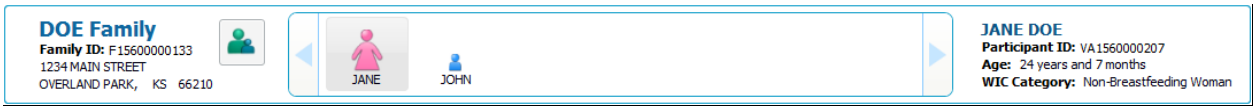
This process includes the following task(s):

Task A. Certifying the Family – Family Demographics Screen **5-59**
Task B. Certifying the Family – Family Assessment Screen **5-65**
Task C. Certifying the Family – Participant Demographics Screen **5-66**
Task D. Certifying the Family – Income Information Screen **5-70**
Task E. Certifying the Family – Certification Signature Screen **5-73**
Task F. Certifying the Family – Health Information Screen **5-75**
Task G. Certifying the Family - Anthro/Lab Screen **5-82**
Task H. Certifying the Family – Eco-Social Assessment Screen **5-87**
Task I. Certifying the Family – Dietary & Health Screen **5-90**
Task J. Certifying the Family – Assigned Risk Factors Screen **5-93**
Task K. Certifying the Family – Certification Summary Screen **5-97**

Task A. Certifying the Family – Family Demographics Screen

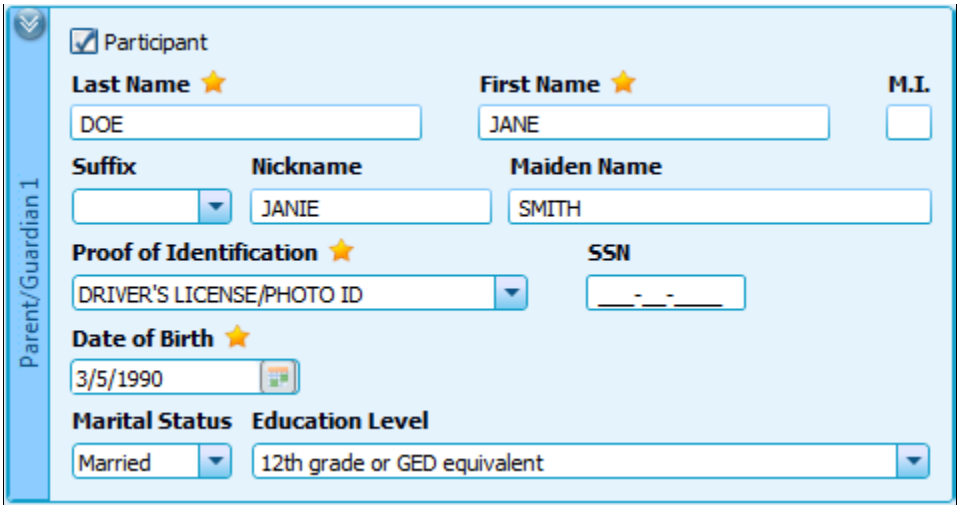
Complete the following steps to perform this task:

1. Add a family record consisting of a Non-breastfeeding woman and an infant. Each family member is displays as an icon within the family header.



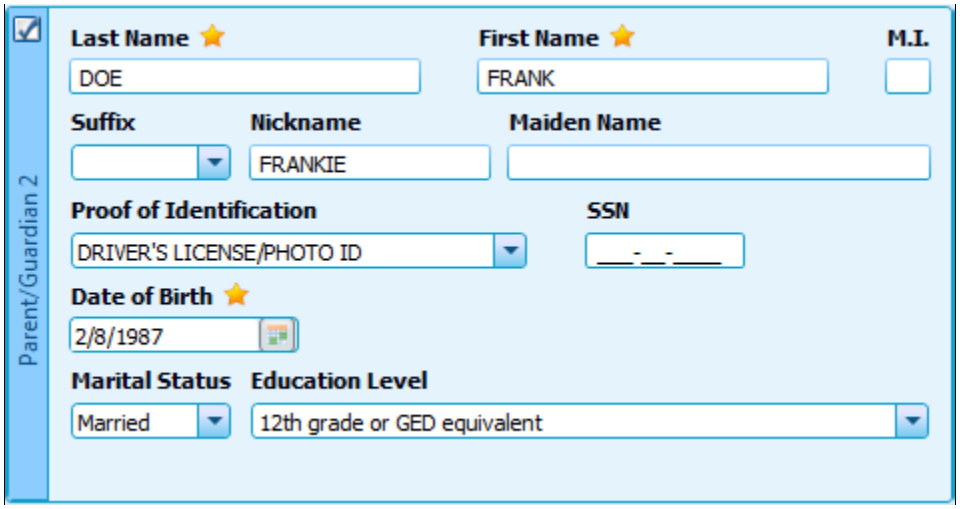
2. Complete the **Family Demographics** screen by doing the following:

   a. Under **General Information**, complete the **Parent/Guardian1** section.

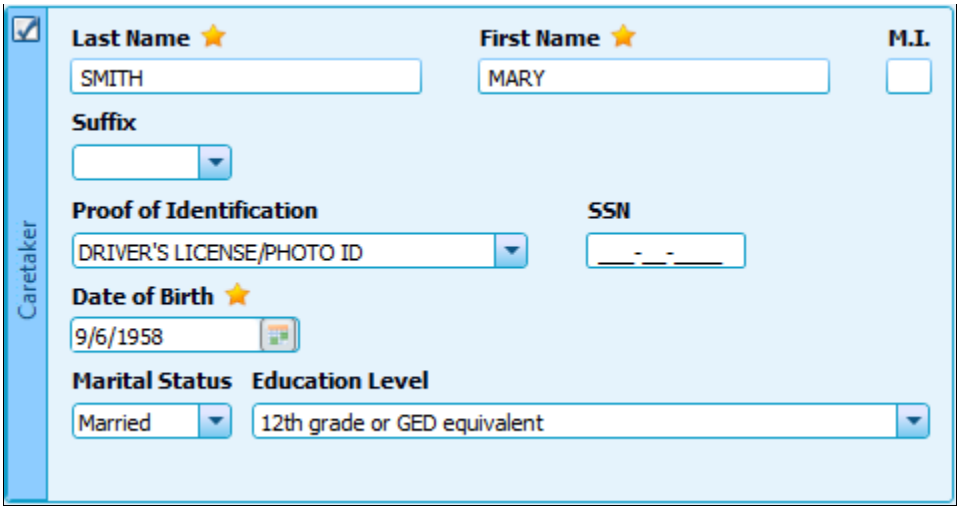


Only the items marked with the Required Information icon (⭐) are required. However, State or Local Agency policy may require you to enter more than the system-required items.

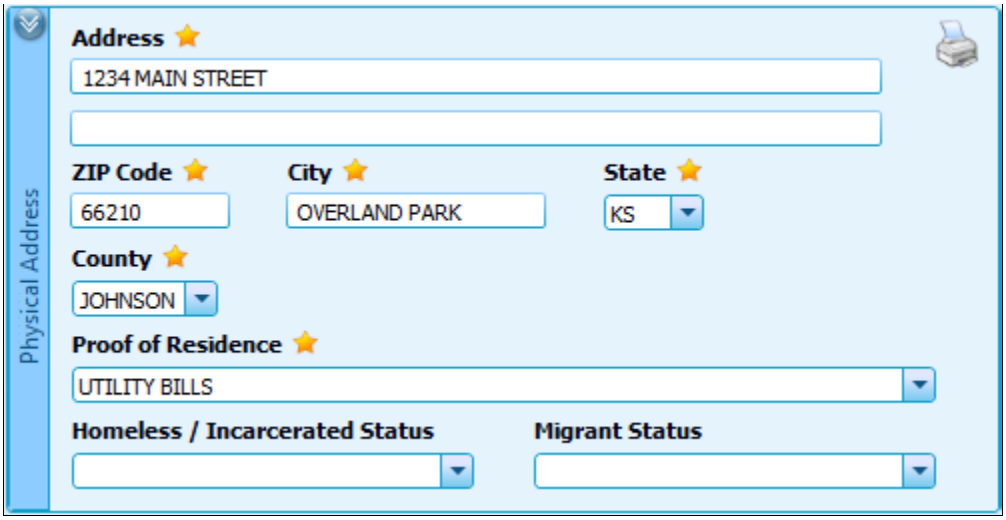
b. Under **General Information**, complete the **Parent/Guardian2** section by clicking the check box, if applicable.



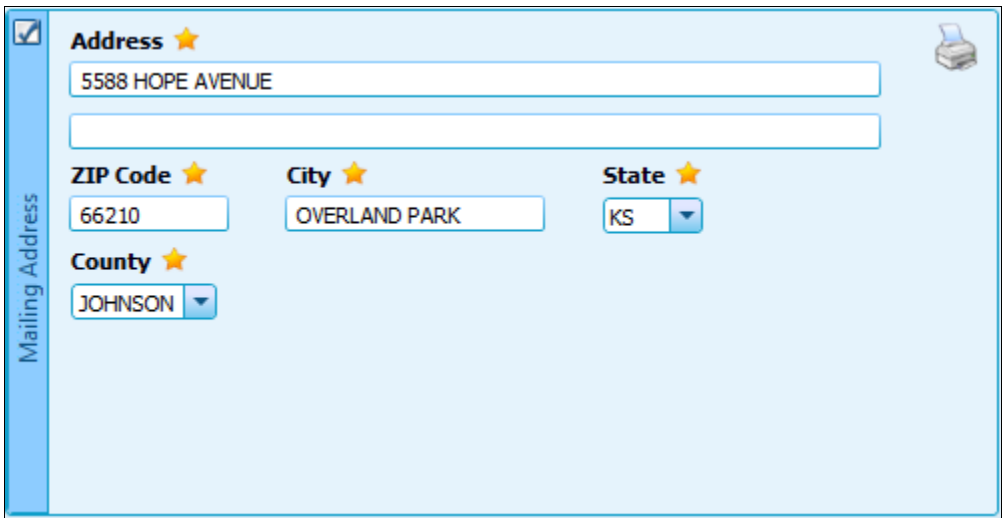
c. Under **General Information**, complete the **Caretaker** section by clicking the check box, if applicable.



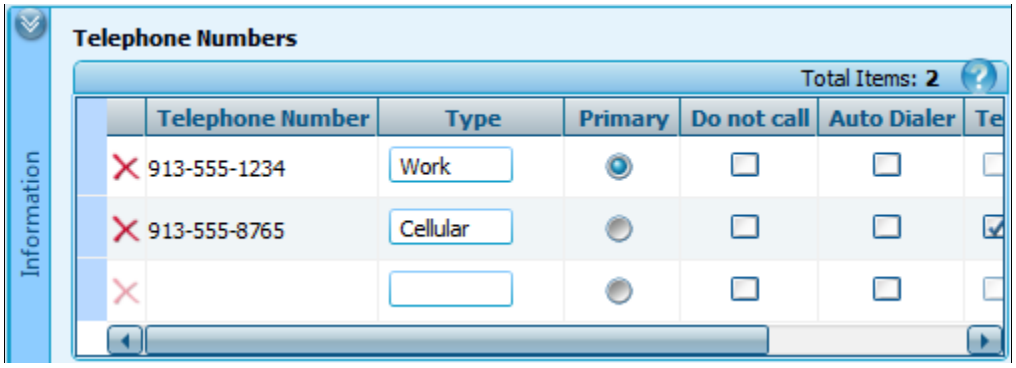
d. Under **General Information**, complete the **Physical Address** section.

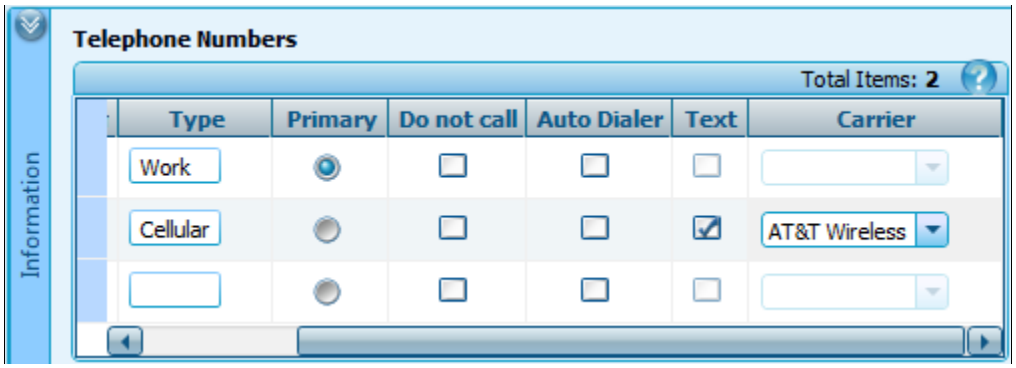


e. Under **General Information**, complete the **Mailing Address** section by clicking the check box if mailing address is different from physical address.



f. Under **General Information**, complete the **Information** section adding as many **Telephone Numbers** as necessary.





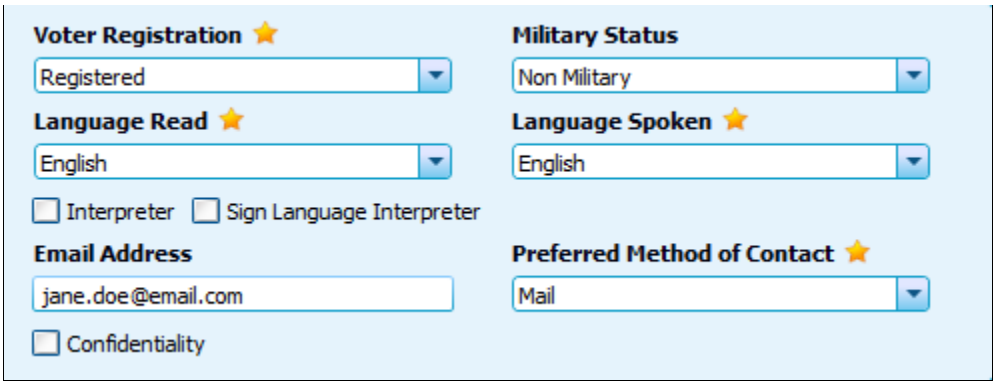
One number must be selected as the primary point of contact for the applicant if a number is listed.

Check Do not call if the applicant requests not to be called at the associated number.

Check Auto dialer if the applicant is interested in receiving auto dialed messages at the associated number

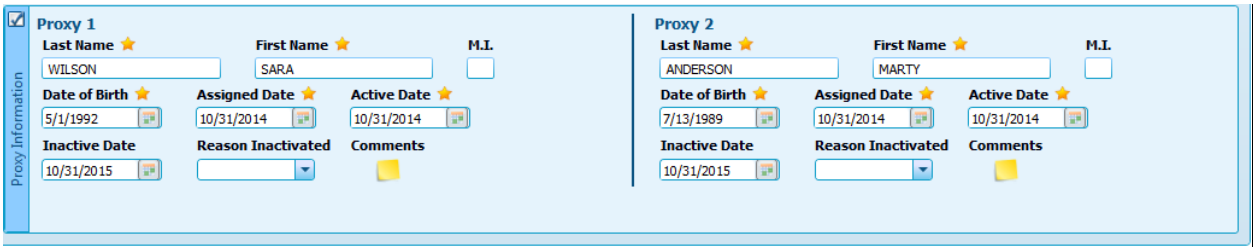
Check Text if the applicant is interested in receiving text messages. A Carrier must be selected if Text is selected.

g. Continue completing the **Information** section.

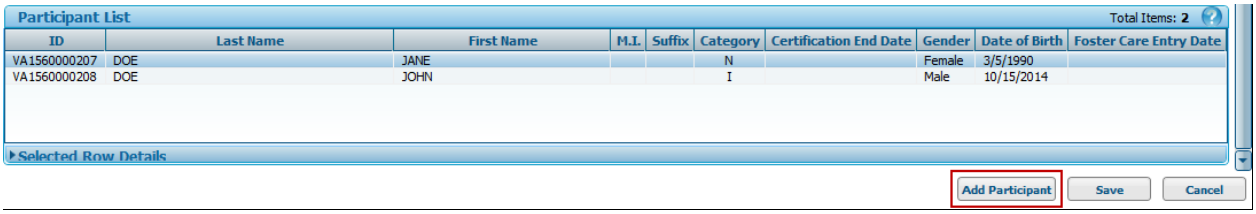


Check Confidentiality to document that confidentially guidelines have been reviewed with the parent/guardian.

h. Under the **General Information** section, complete the **Proxy Information** section by clicking the check box, if applicable.

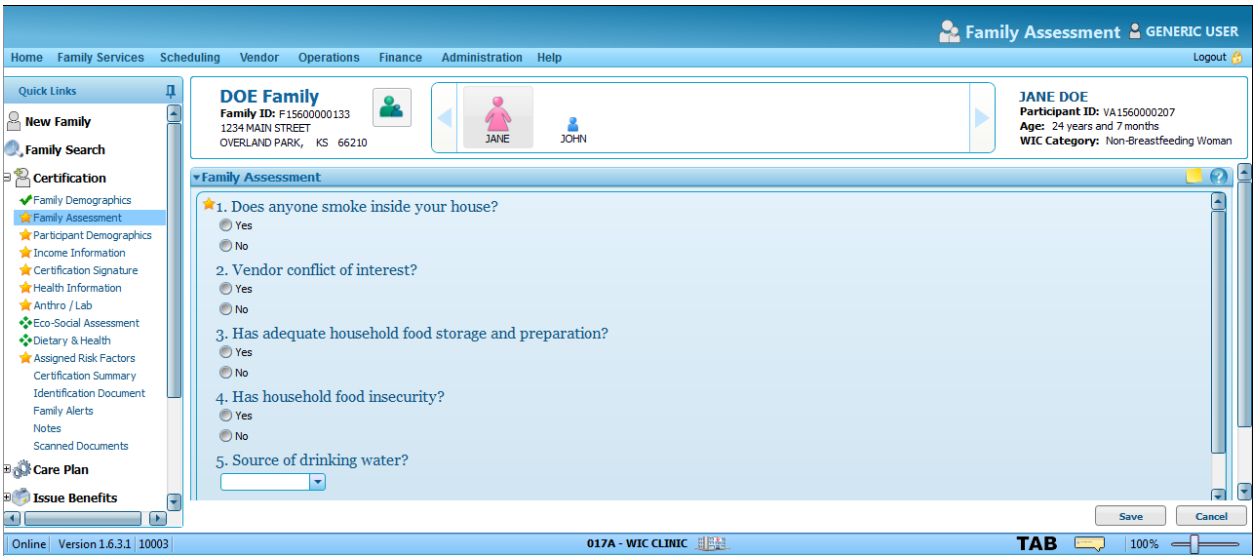


3. View the Participant List section and click **Add Participant** to add additional members to the family record, if necessary.



A Dirty Data Indicator ( ) displays on a family member's icon when changes are made to the screen. You may make multiple changes on a screen before clicking Save. Once changes are saved, the indicator is cleared from the member icon.

4. Click **Save**. A status message displays indicating success and you are navigated to the next screen in the process.



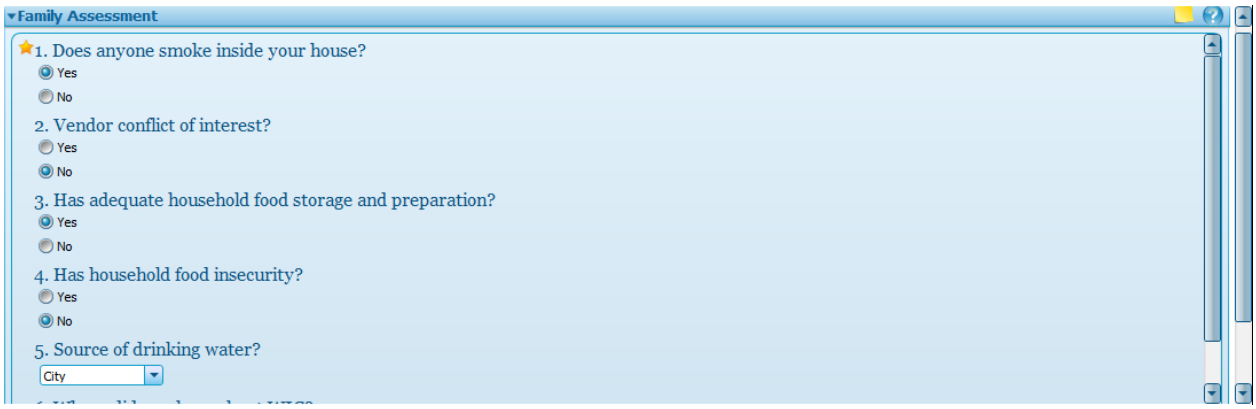
A green Checkmark icon (✔) displays on the Quick Links menu indicating the screen has been completed.

Task B. Certifying the Family – Family Assessment Screen

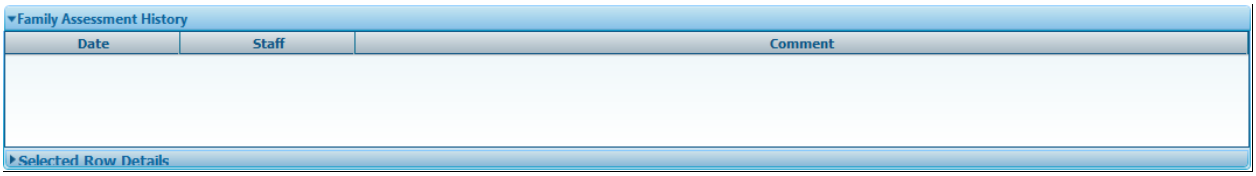
Complete the following steps to perform this task:

1. Complete the **Family Assessment** screen by doing the following:

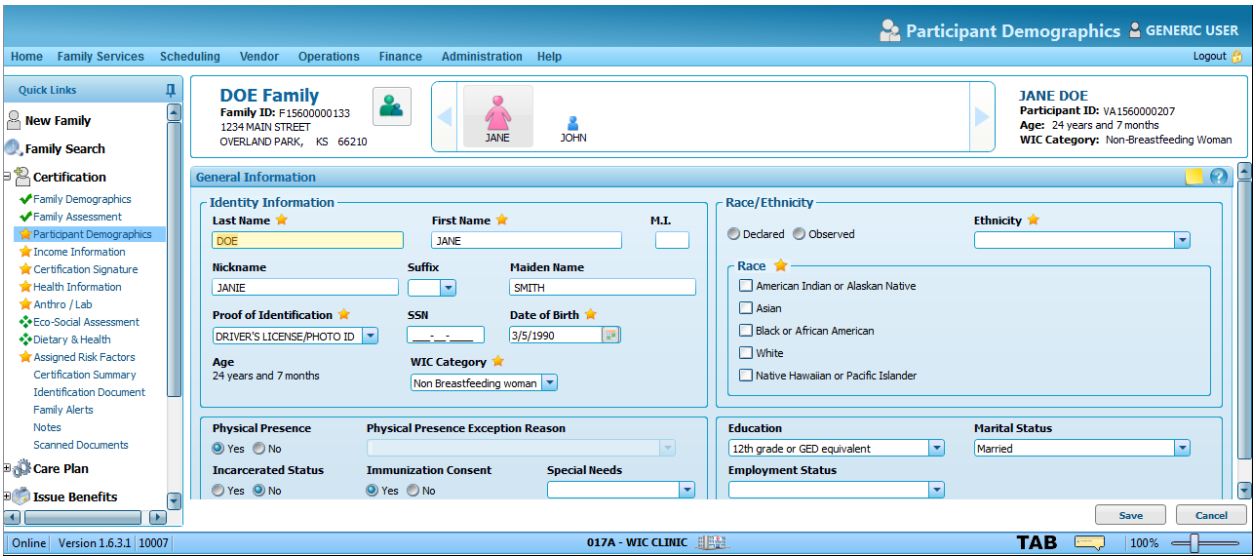
   a. Enter or select answers to the questions listed.



Expand the Family Assessment History section to view previously completed assessments, when applicable.



2. Click **Save**. A status message displays indicating success.



Task C. Certifying the Family – Participant Demographics Screen

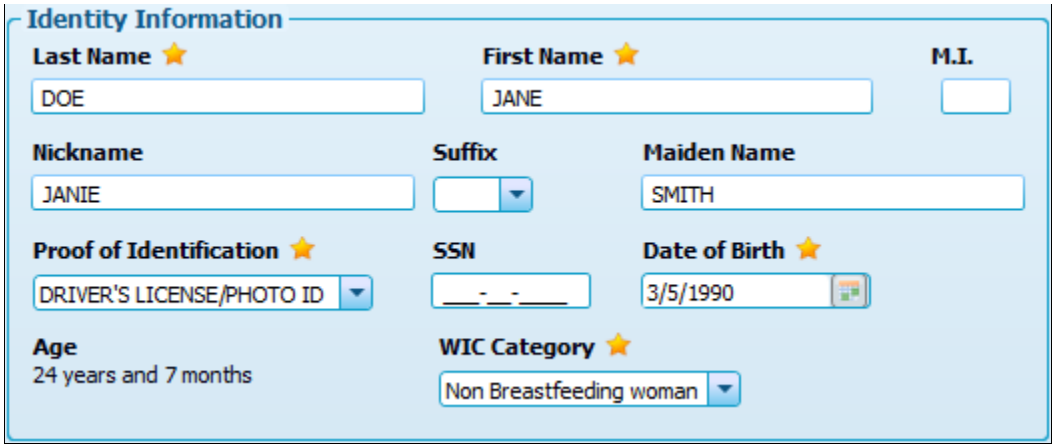
The **Participant Demographics** screen must be completed for each family member separately. Select the desired family member icon within the family header to display the screen for the selected member.

This scenario documents the completion of each system screen for the woman first, followed by the completion of each screen for the infant. You may choose the order that works best for you.

Complete the following steps to perform this task:

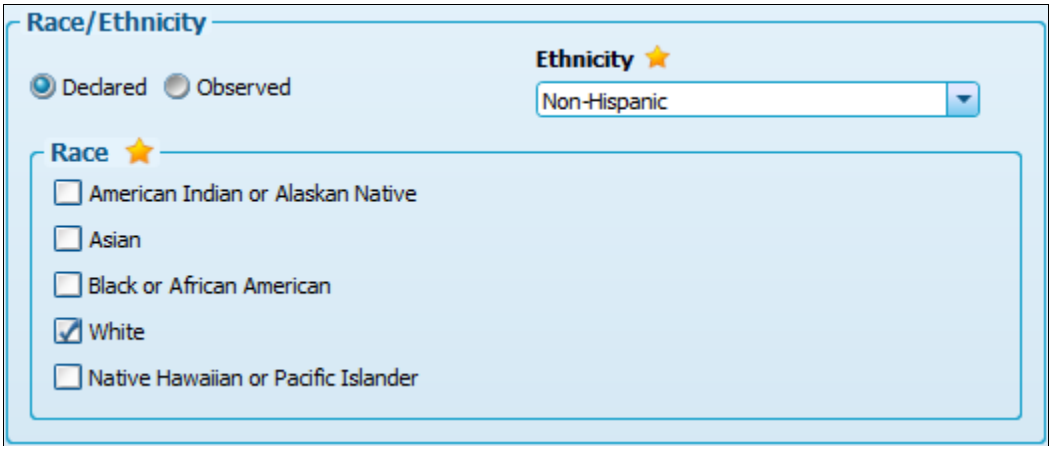
1. Complete the **Participant Demographics** screen for the woman by doing the following:

   a. Complete the **Identify Information** section.

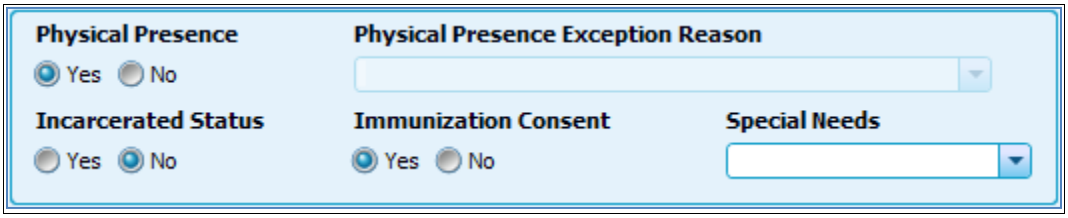


> Verify Non Breastfeeding is selected as the WIC Category.
>
> Verify the woman's Date of Birth. The Date of Birth can be updated until the Certification is complete. Once the Certification is complete, the Date of Birth cannot be updated by the user.

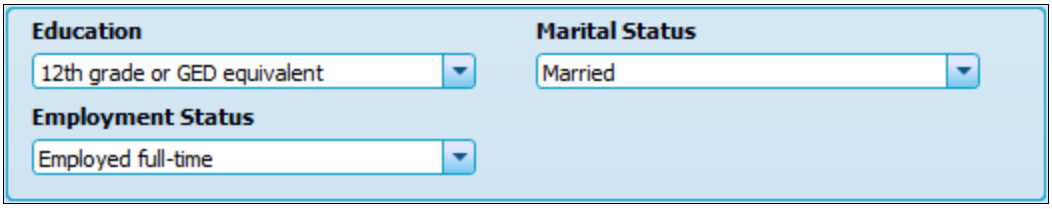
   b. Complete the **Race/Ethnicity** section. Check the boxes that apply in the **Race** container.



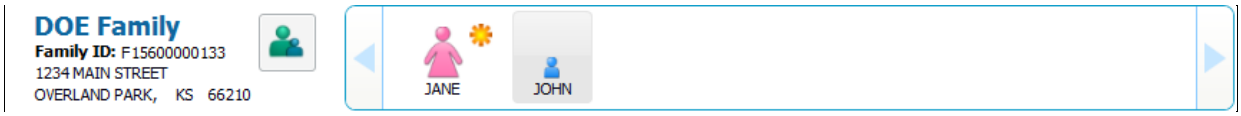
c. Complete the group box below.

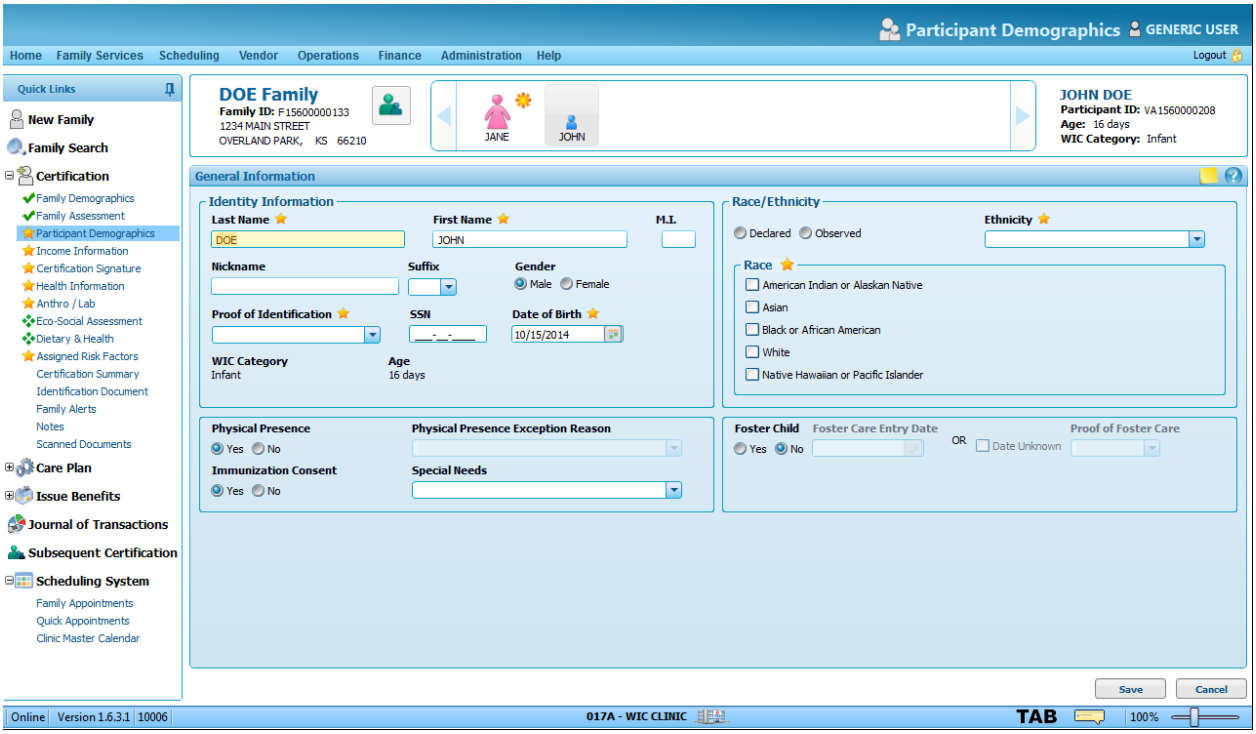


d. Complete the group box below.



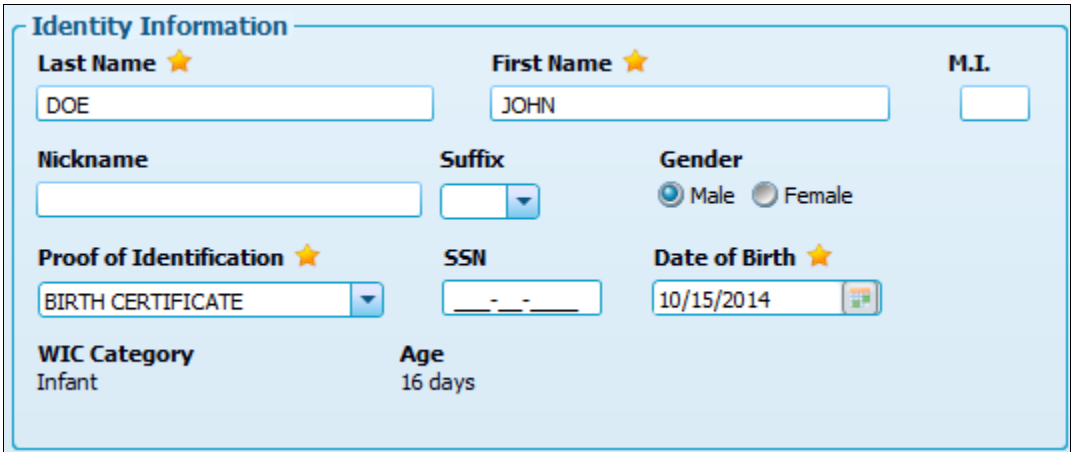
2. Select the infant member icon in the Family Header. The screen refreshes and displays information associated to the infant.





3. Complete the **Participant Demographics** screen for the child by doing the following:

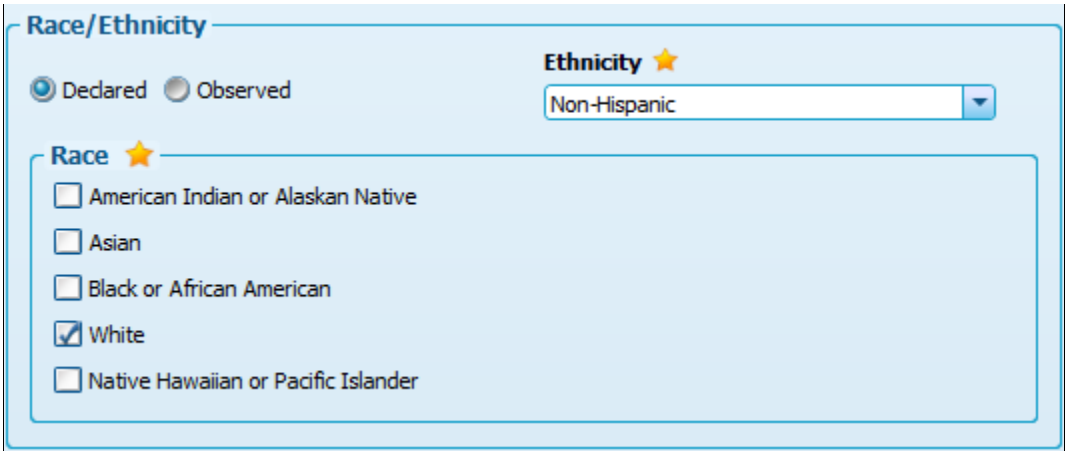
a. Complete the **Identify Information** section.



The system automatically assigns a WIC Category of Infant based on the user entered Date of Birth. If a different WIC Category is needed, the member's Date of Birth must be modified.

Verify the infant's Date of Birth. The Date of Birth can be updated until the Certification is complete. Once the Certification is complete the Date of Birth cannot be updated by the user.

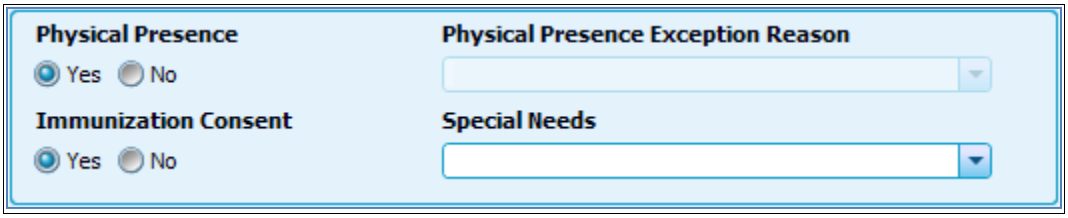
b. Complete the **Race/Ethnicity** section.



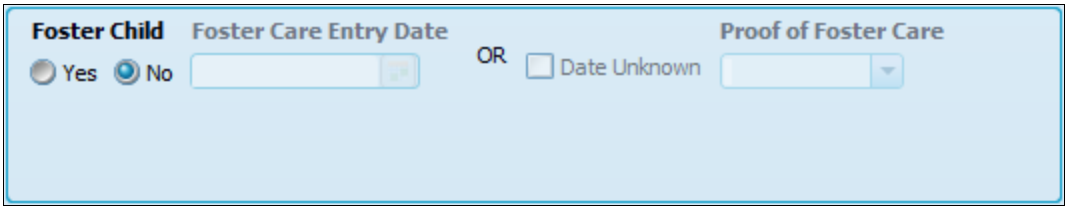
Select Declared if Race/Ethnicity is declared by the applicant or parent/guardian. Select Observed when it is necessary for you to make your own determination as to the applicant's race/ethnicity.

Multiple check boxes can be selected under Race as necessary.

c. Complete the group box below.

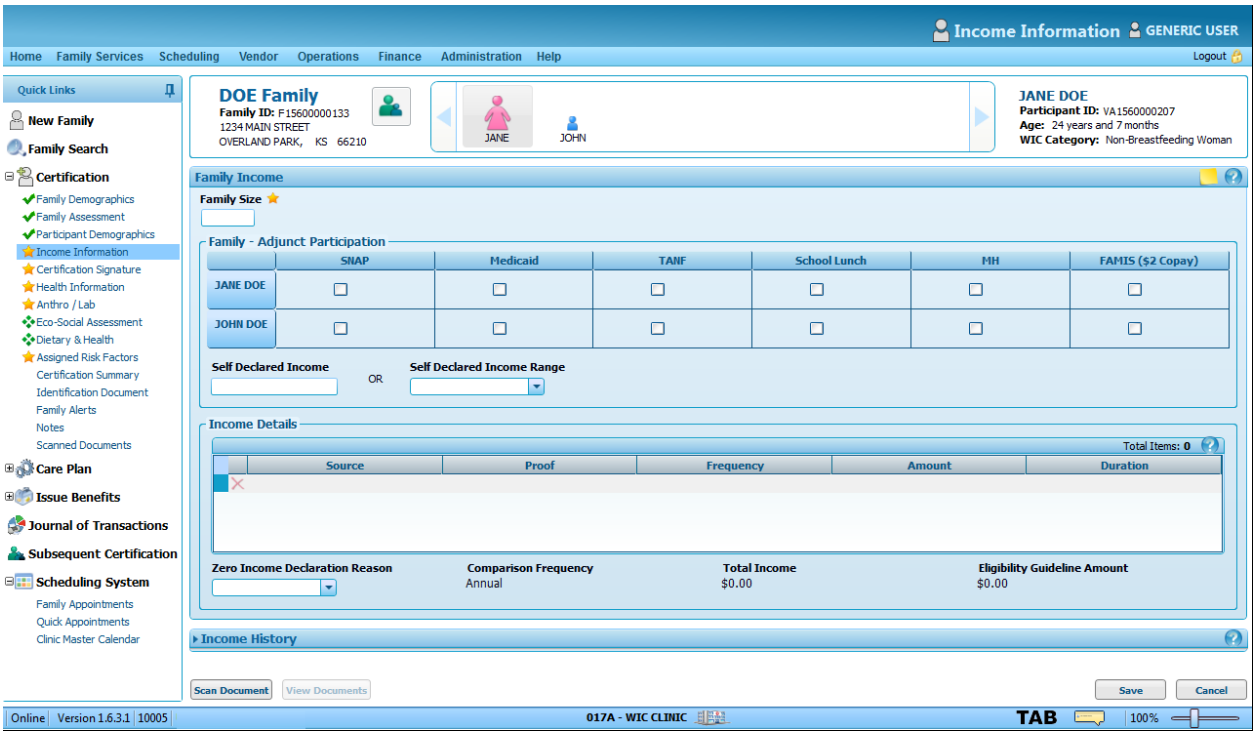


d. Complete the text box below.



A selection of Yes indicates the infant is a foster child and then requires a response to Foster Care Entry Date (or Date Unknown) and Proof of Foster Care.

4. Click **Save**. A status message displays indicating success and you are navigated to the next screen in the process.



Task D. Certifying the Family – Income Information Screen

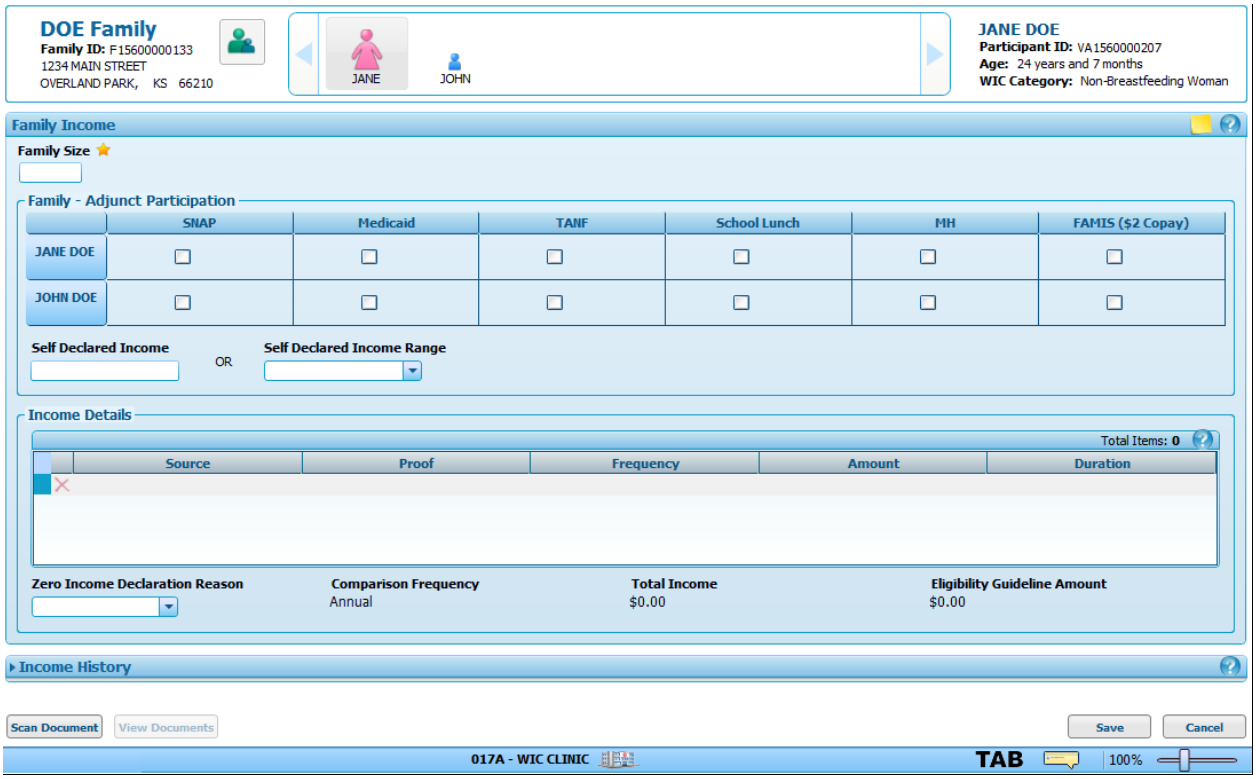
The Income Information screen is a family screen. It can be completed with any family member selected.

The process of documenting income is illustrated using three different methods. The three methods are listed below and includes the name of the scenario that illustrates how to document each method:

Detailed income declarations: Certifying a Pregnant Woman and Her Two Year Old Child

Adjunctively income eligible program participation: Certifying a Breastfeeding Woman and Her Infant scenario

Zero income: Certifying a Non-breastfeeding Woman and Her Infant (current scenario)



Complete the following steps to perform this task:

1. Enter the number of members in the family in **Family Size**.

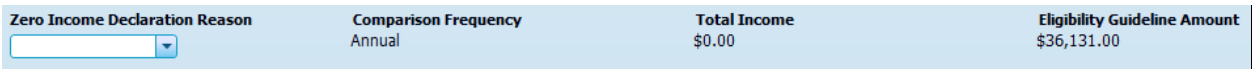
In this scenario, Adjunct participation is not checked since the family is not participating and intends to report no income.

Self Declared income and Self Declared Income Range are available only if the family is income eligible through Adjunct participation.

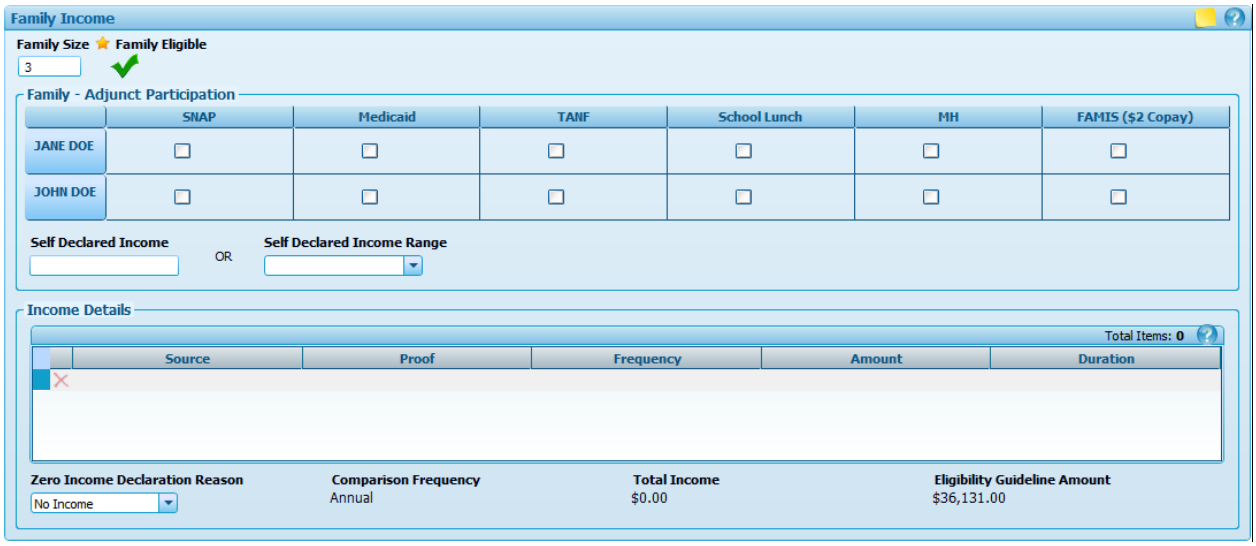
The Income Detail grid is required if family income eligibility is not determined by Adjunct Income.

In this scenario the family declares No Income. The Zero Income Declaration Reason is enabled. This field is required when the family reports zero income and is not Adjunctively Income Eligible.

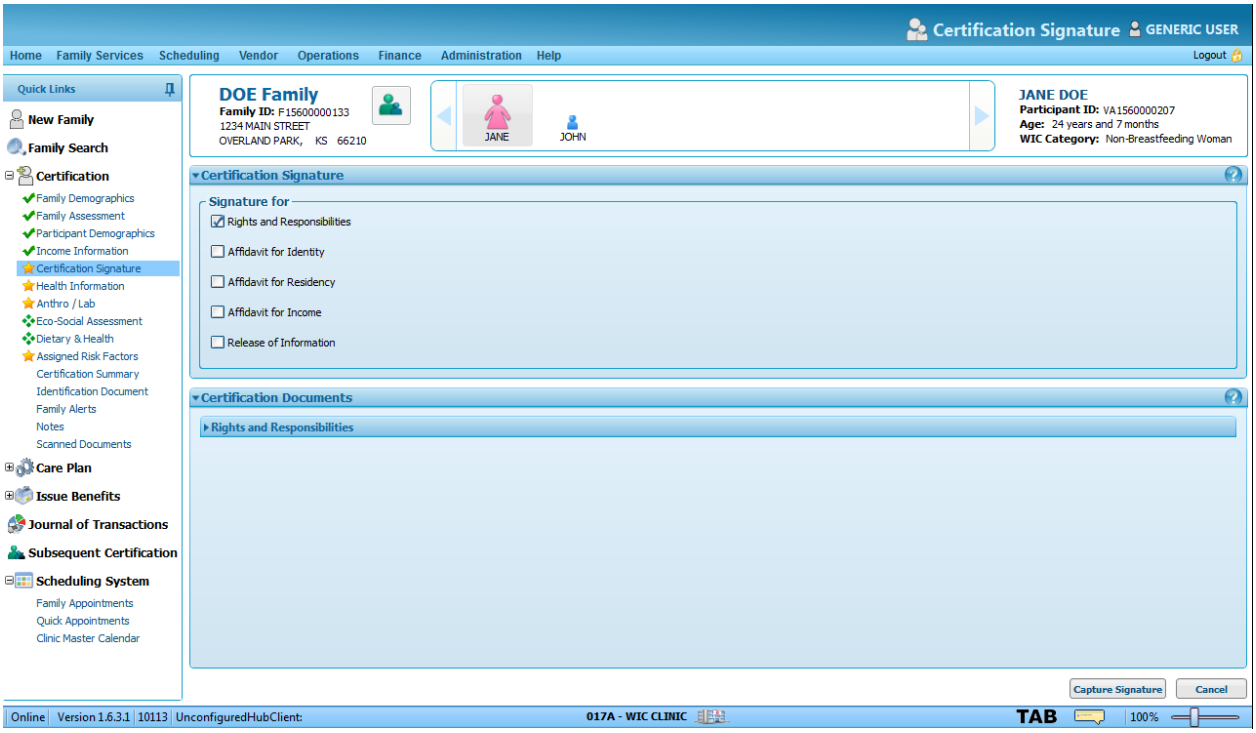
Note that the Zero Income Declaration Reason field is enabled and required if they are to be eligible. Otherwise, a pop up box will be received stating the family will be ineligible.



2. Select a reason from the **Zero Income Declaration Reason** drop down list box. Select **No Income** (this list is state-configurable). Note the **Income History** container (expanded) that becomes populated after you click the **Save** button.



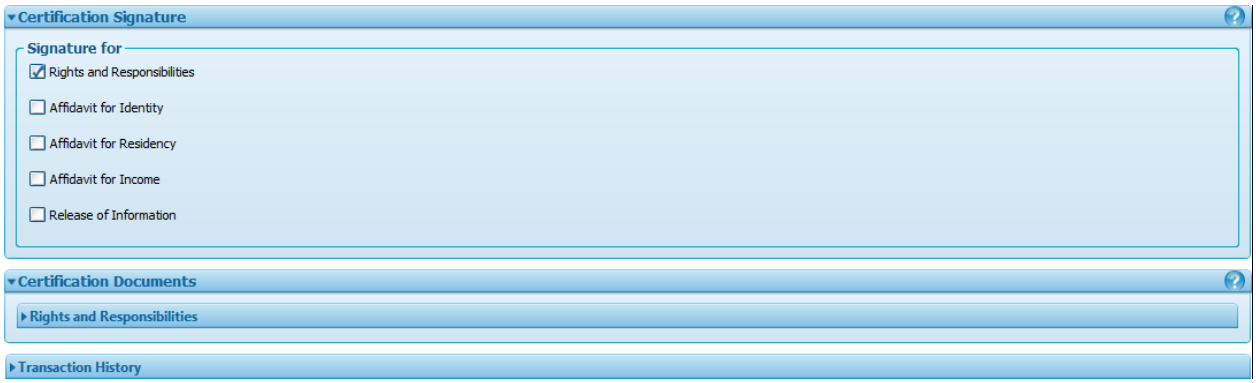
3. Click **Save**. A status message displays indicating success and you are navigated to the next screen in the process.



Task E. Certifying the Family – Certification Signature Screen

Complete the following steps to perform this task:

1. Complete the **Certification Signature** screen for the woman by selecting the option(s) to capture a signature.



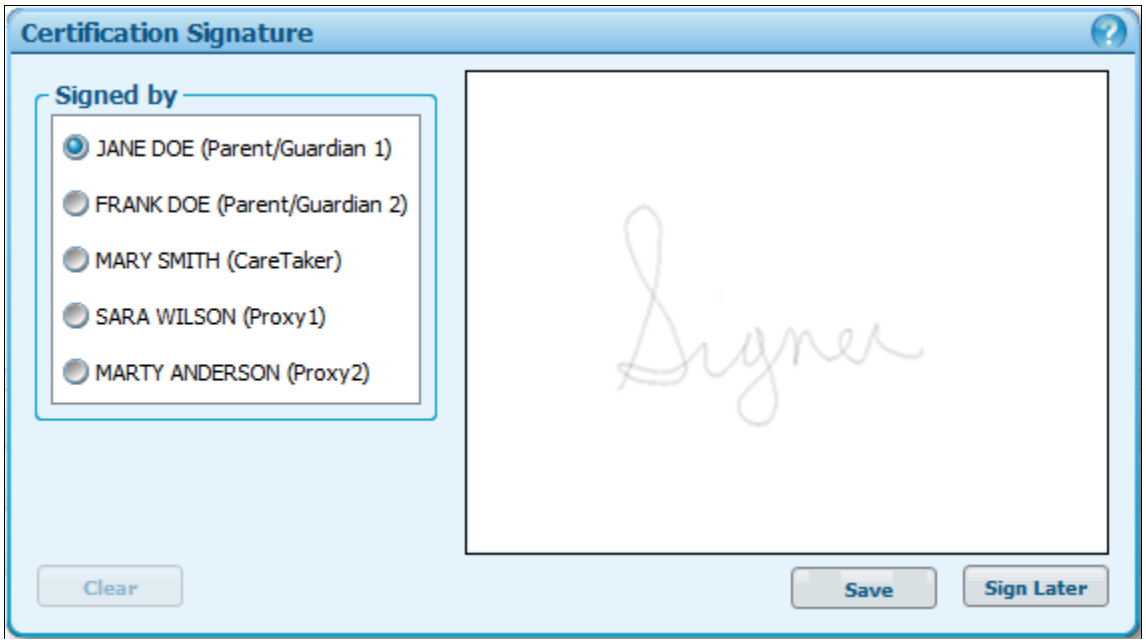
At least one option must be checked before the Capture Signature button is enabled.

The system automatically checks the Rights and Responsibility option for the first family member who completes the Certification Signature screen. Once you obtain the signature, the system automatically signs the Rights and Responsibility for the remaining family members and displays a green Checkmark icon (✔) indicating completion.

A signature must be captured for the Rights and Responsibilities option before you can complete the Certification process.

For each option selected, a Template text displays and can be viewed by clicking on the associated arrow button.

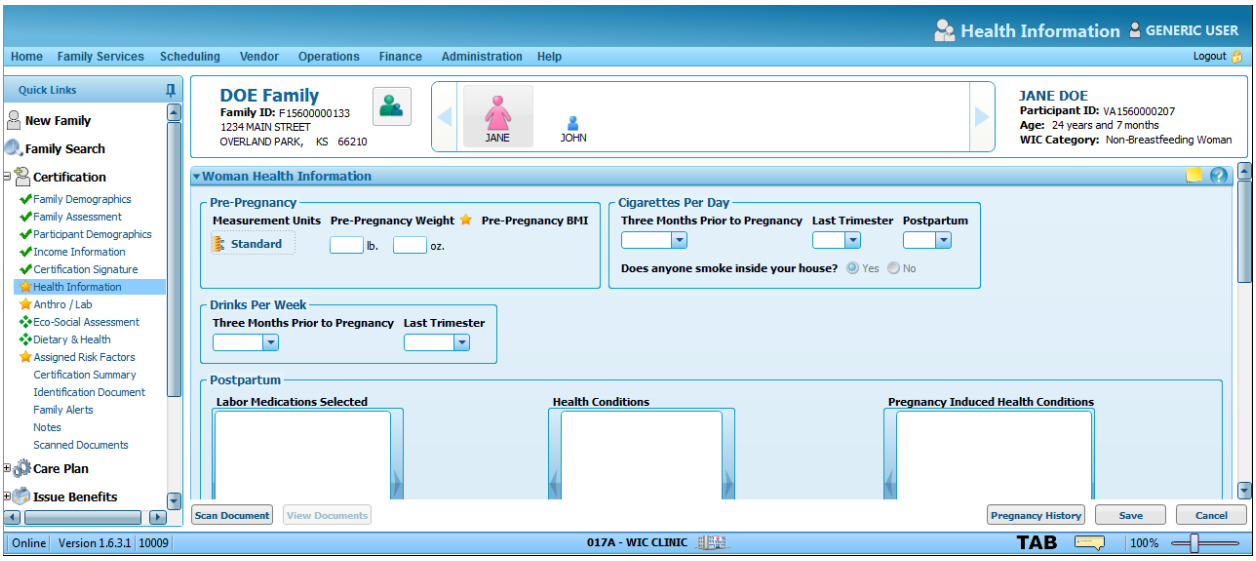
2. Click **Capture Signature** to capture an electronic signature. The **Certification Signature** screen displays.



a. Select the desired parent, guardian, or caretaker within the **Signed by** section.

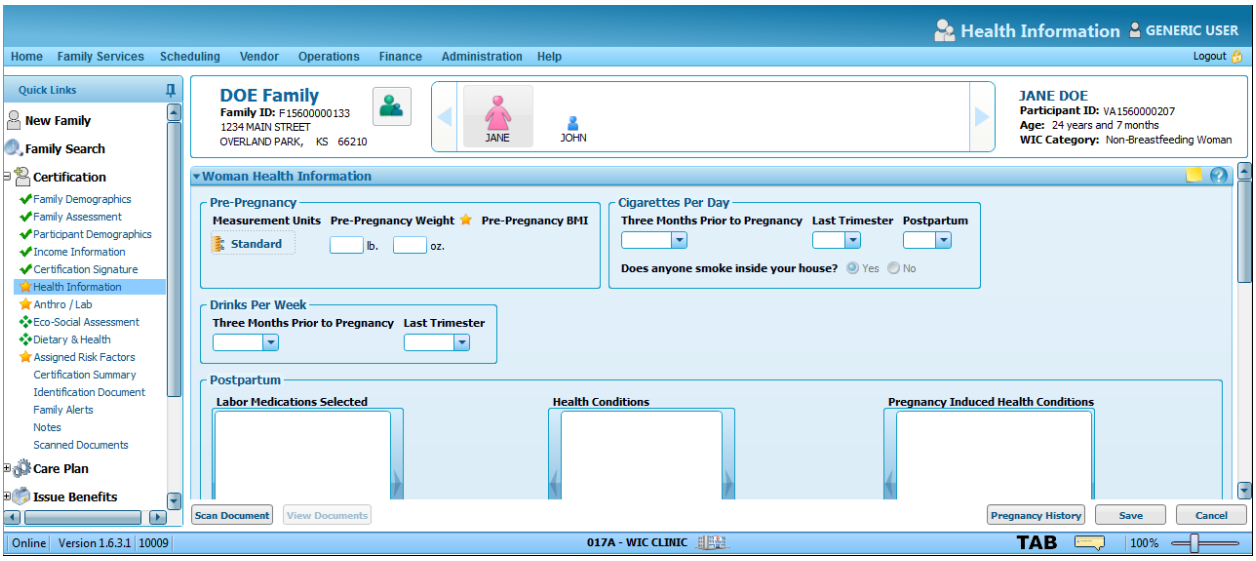
b. Direct the individual to sign.

c. Click **Save**. A status message displays indicating success and you are navigated to the next screen in the process.



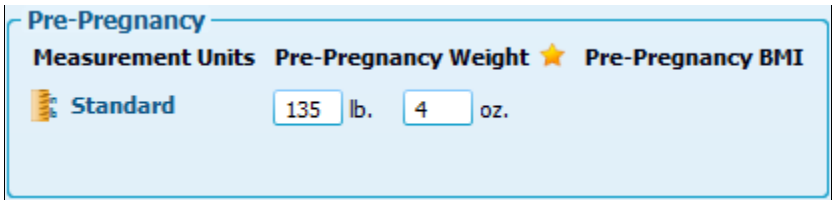
Task F. Certifying the Family – Health Information Screen

The **Health Information** screen must be completed for each family member.

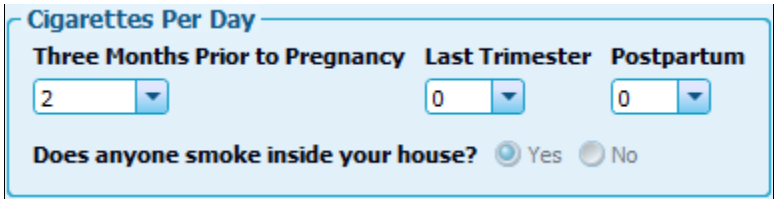


Complete the following steps to perform this task:

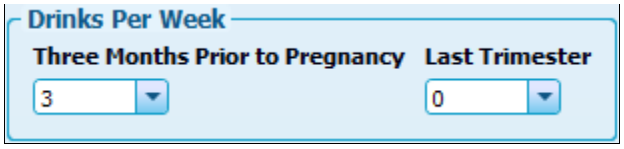
1. Complete the **Pre-Pregnancy** group box for the woman.



2. Complete the **Cigarettes Per Day** group box for the woman.

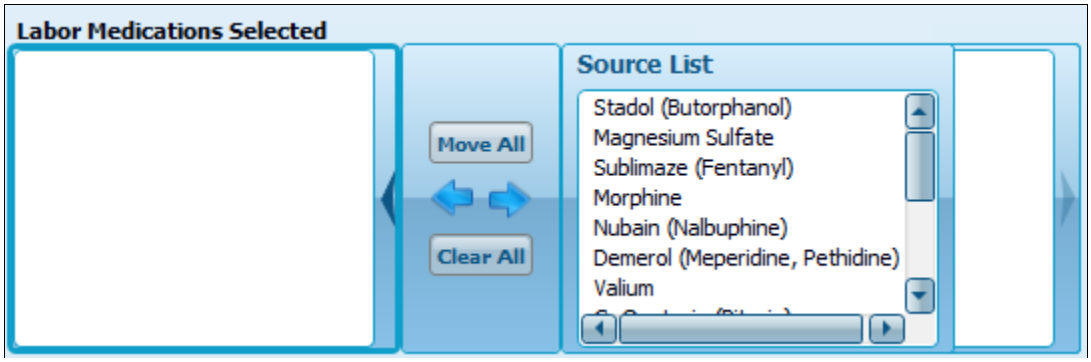


3. Complete the **Drinks Per Week** group box for the woman.

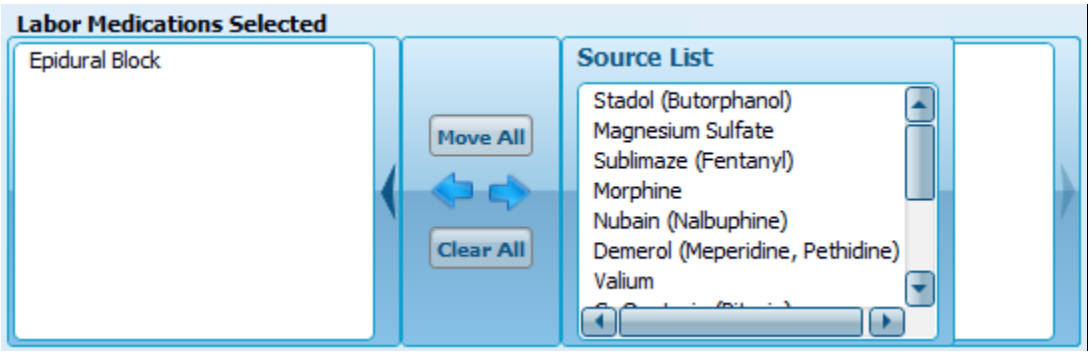


4. Within the **Postpartum** group box, complete each slider list box by doing the following:

   a. Click the slider list box arrow. A **Source List** box displays.



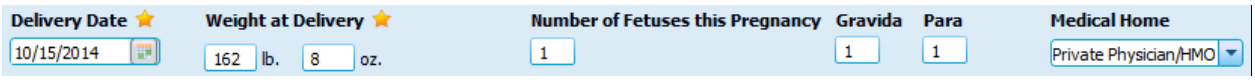
   b. Select applicable items and click the **Left Arrow** button ( ) to move selections from the "available" list box to the "selected" list box or double click the item in the source list to populate in the “selected” list box.



> Double-clicking an item in the “available” list box automatically moves the item to the “selected” list box. Using the double-click feature also prevents the list box from closing after each selection.
>
> You may also multi-select items by holding down the control (Ctrl) key on your keyboard while using the mouse.

   c. Collapse the slider list box once all applicable listings are selected.

   d. Complete the remaining items within the **Postpartum** group box.



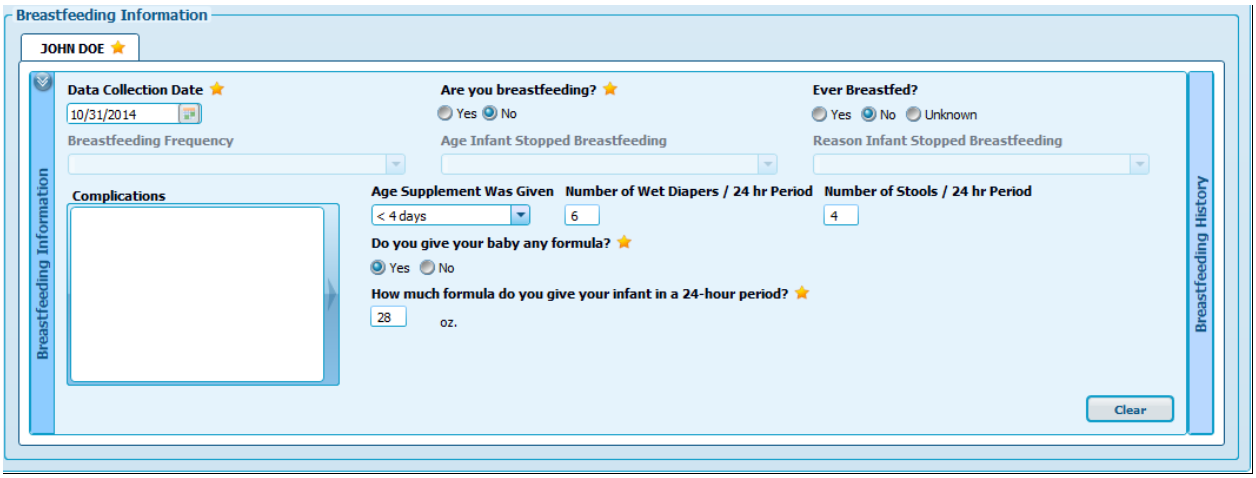
> Delivery Date is set to the Date of Birth of the linked infant by default.

5. Complete the group box with the **Name of Associated Infant**.

Most group boxes within the system are named based on the type of information displayed within the group box itself. However, in this case, the group box is named after the associated infant. For example, if the infant's name is "John Doe", the name of the group box will be titled "John Doe".

An Unlink Child button displays under the Name of Associated Infant group box. Click this button to unlink a woman and the associated infant/child. This action CANNOT be undone.

6. Complete the **Breastfeeding Information** group box for each linked infant (see Note below).

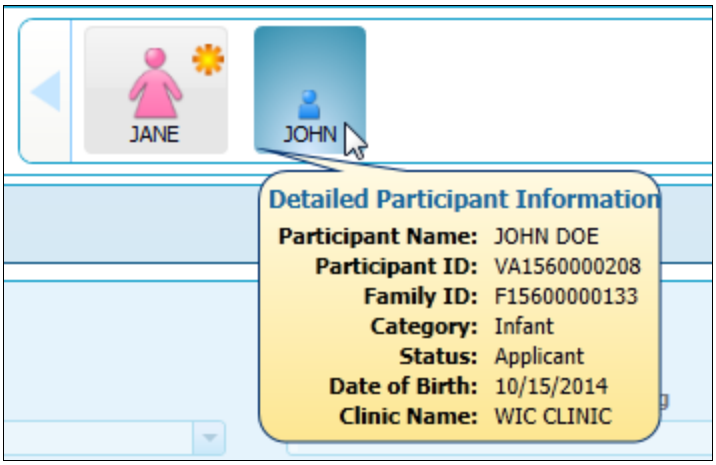


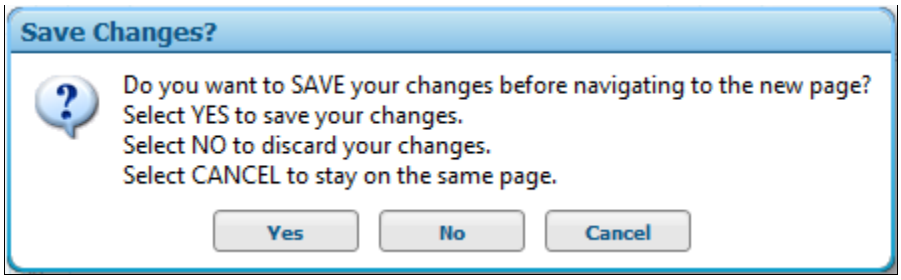
For this scenario, only one linked infant exists (John Doe). However, a separate tab for each infant displays if the woman's delivery resulted in more than one live birth.

For this scenario, identify the woman as Non-breastfeeding and the infant as fully formula fed. Select No for both Are you breastfeeding? and Ever Breastfed? Additionally, select Yes for Do you give your baby any formula? Selecting Yes displays the How much formula do you give your infant in a 24-hour period? text box.

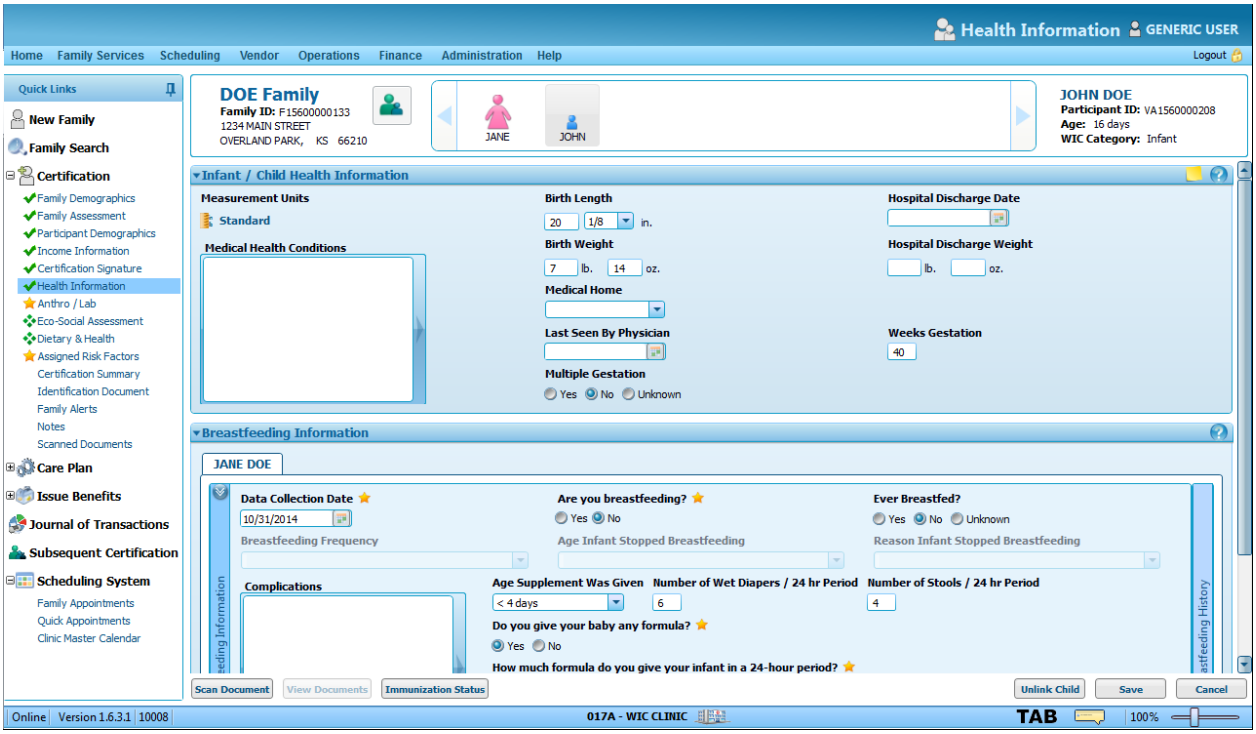
The system calculates the amount of formula an infant consumes in a month by multiplying the value entered into the How much formula do you give your infant in a 24-hour period? text box by 30 (Ounces in a 24 hour period x 30 days = Amount of ounces consumed per month). The calculated value is utilized on the Prescribe Food screen to determine the feeding status of the infant and the default number of cans prescribed to the infant. In the example above, the calculated value equals 840 (28 x 30 = 840). If the calculated amount exceeds the maximum amount allowed for the formula item, the system prescribes the maximum amount by default. For example, if the maximum amount is 806 ounces per month for a fully formula fed infant, then the system prescribes 806 ounces instead of 840 ounces. The amount prescribed by default can be updated on the Prescribe Food screen if necessary as long as the amount does not exceed the maximum amount allowed.

7. Select the infant member icon within the family header. A confirmation screen displays prompting you to save changes.

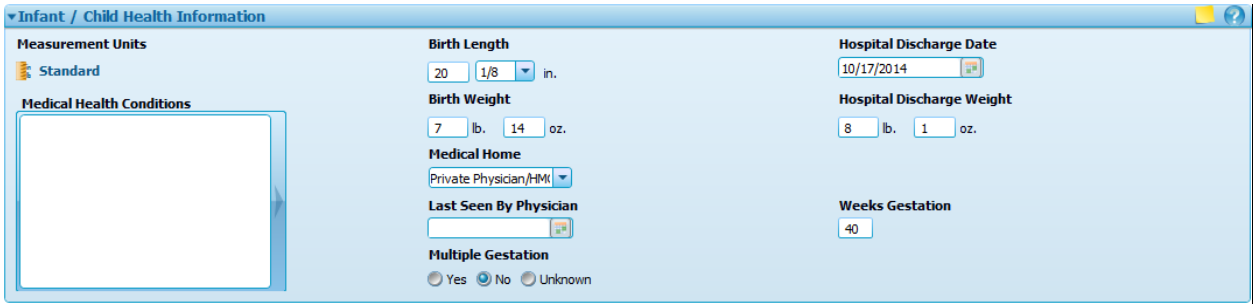




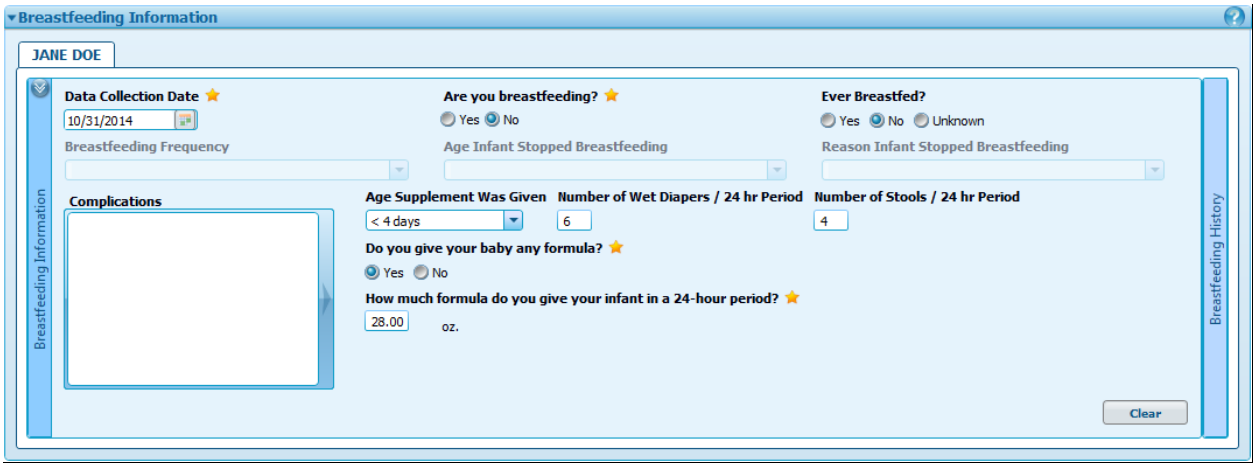
8. Select **Yes** to save your changes. The **Health Information** screen displays for the infant.



9. Complete the **Infant / Child Health Information** section for the infant.



10. Review and/or modify the **Breastfeeding Information** section for the Infant as necessary.

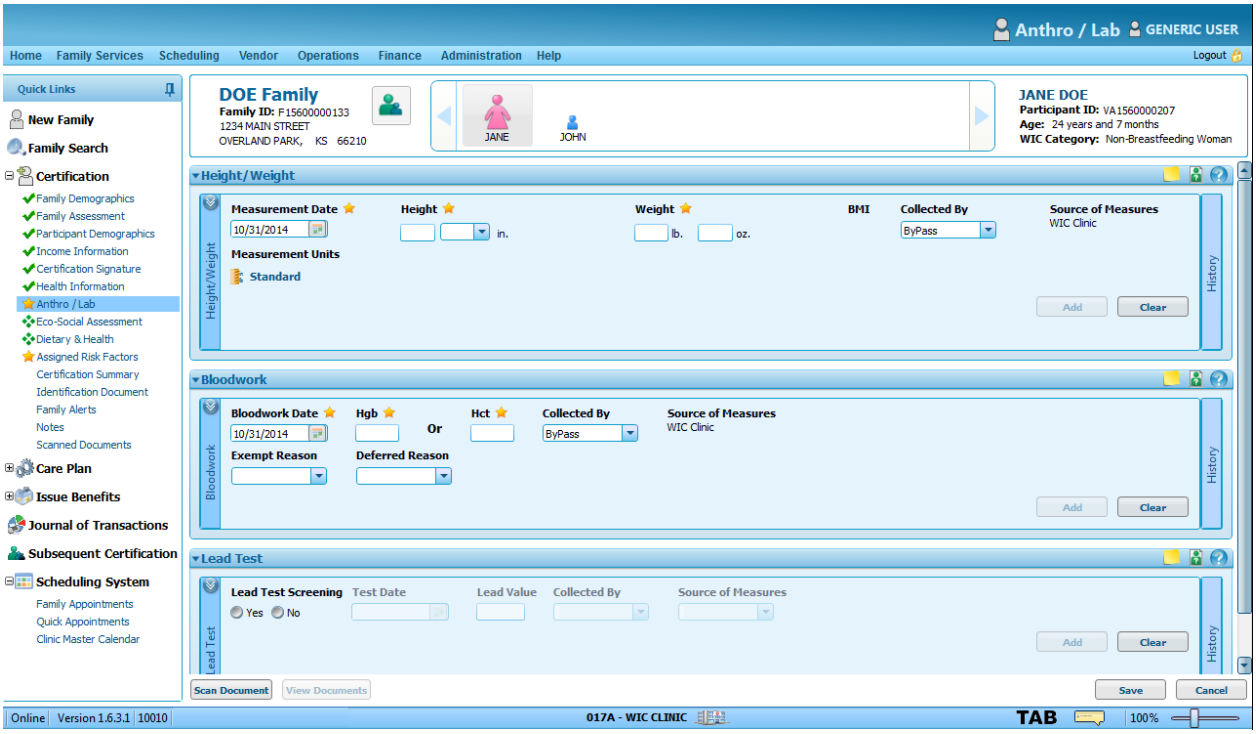


Most group boxes within the system are named based on the type of information displayed within the group box itself. However, in this case, the group box is named after the associated woman. For example, if the woman's name is "Jane Doe", the name of the group box will be titled "Jane Doe".

The specific selections made within the Breastfeeding Information group box on the Health Information screen for the woman are displayed within the Breastfeeding Information group box for the infant. The woman and infant are linked together. Any changes made to one group box updates the other group box automatically. This ensures the woman and infant are in sync.

An Unlink Child button displays near the Save button. Click this button to unlink a woman and the associated infant/child. This action CANNOT be undone.

11. Click **Save**. The system saves any changes and navigates you to the next screen in the process.

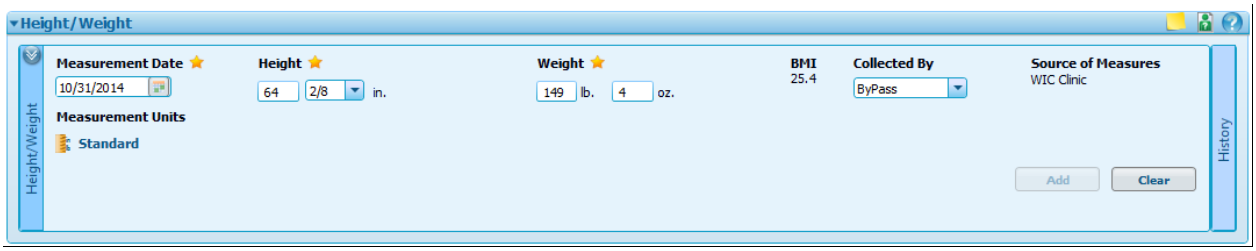


Task G. Certifying the Family - Anthro/Lab Screen

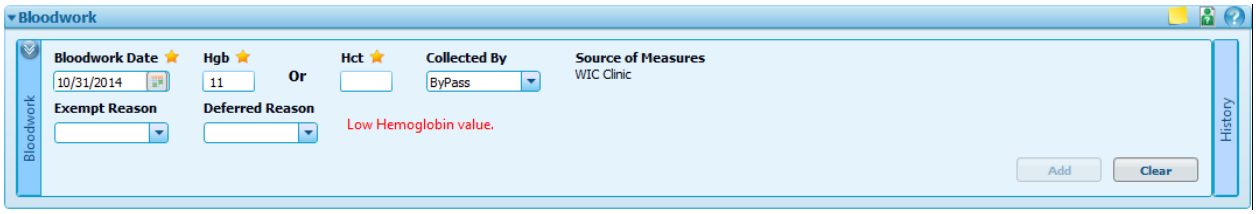
As with the **Participant Demographics** and **Health Information** screens, the **Anthro/Lab** screen must be completed separately for each family member.

Complete the following steps to perform this task:

1. Complete the **Height/Weight** for the woman.



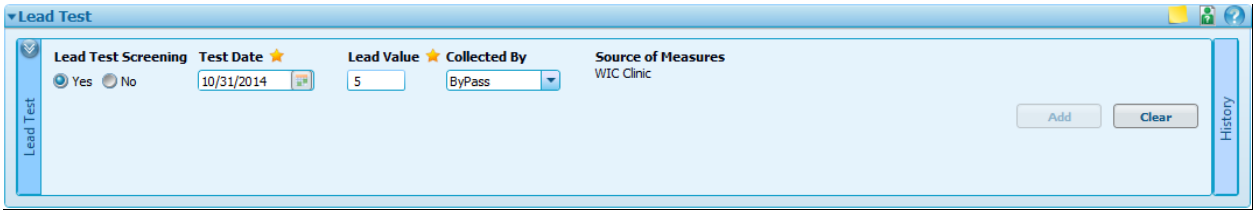
2. Complete the **Bloodwork** for the woman. If hemoglobin or hematocrit is defined by the system as low, text will appear in red.



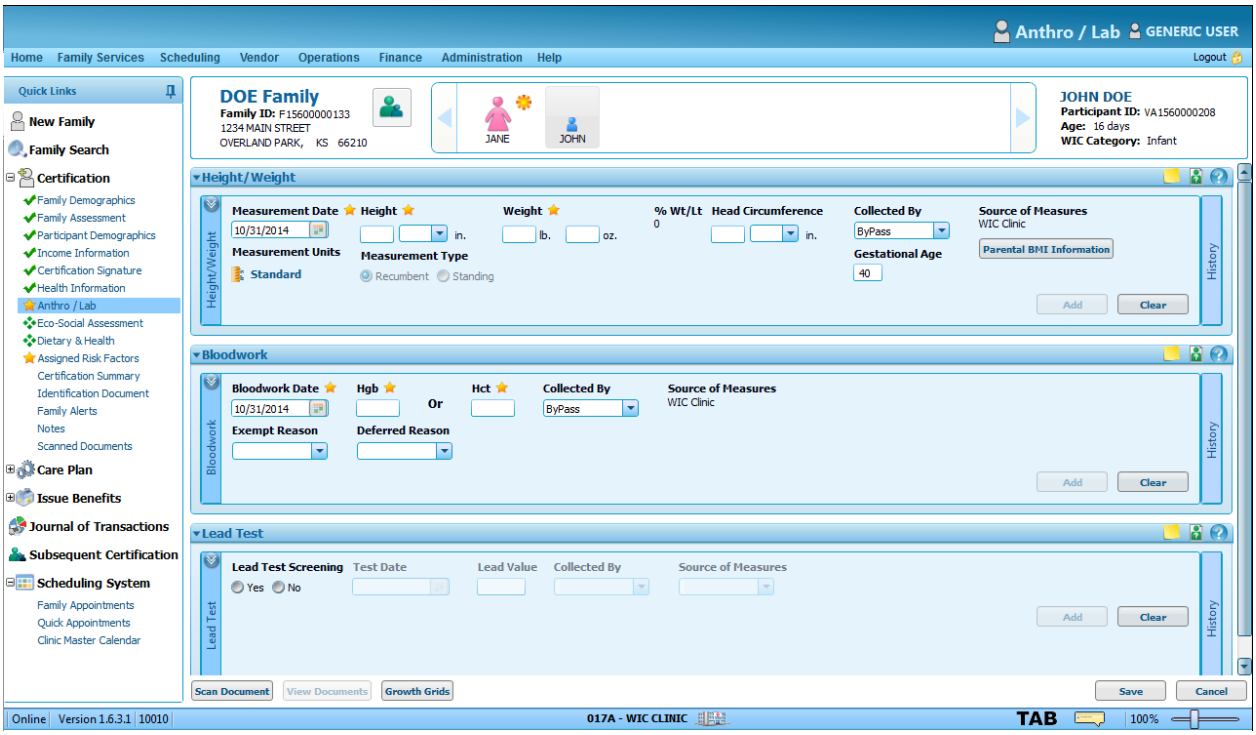
Bloodwork is required for both Breastfeeding and Non-breastfeeding women for the initial postpartum Certification.

Bloodwork is required for the 6-12 month postpartum certification if the last bloodwork was collected prior to the actual delivery date.

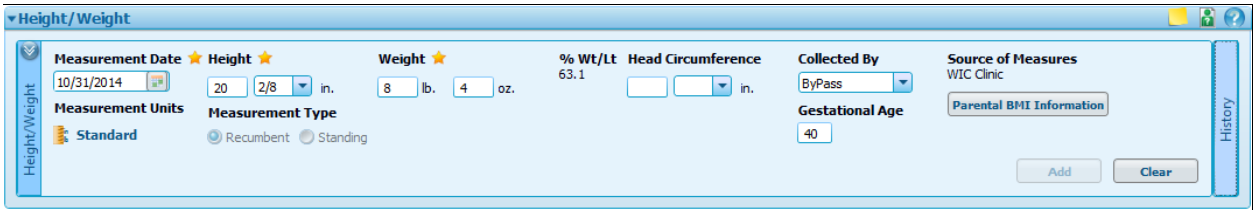
3. Complete the **Lead Test** for the woman, if applicable.



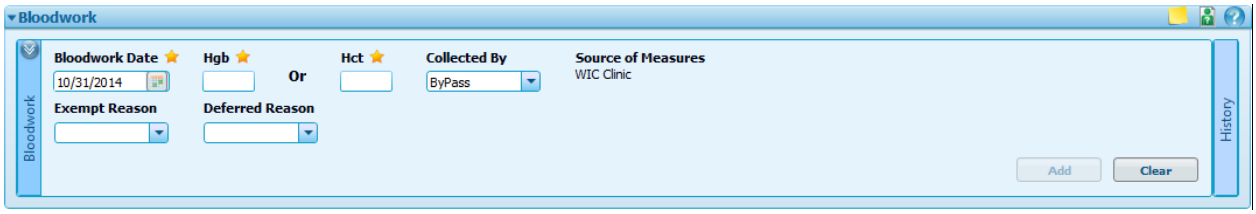
4. Select the infant member icon within the **Family Header**. The **Anthro/Lab** screen displays for the infant.



5. Complete the **Height/Weight** for the infant.



6. Complete the **Bloodwork** for the infant, if applicable.

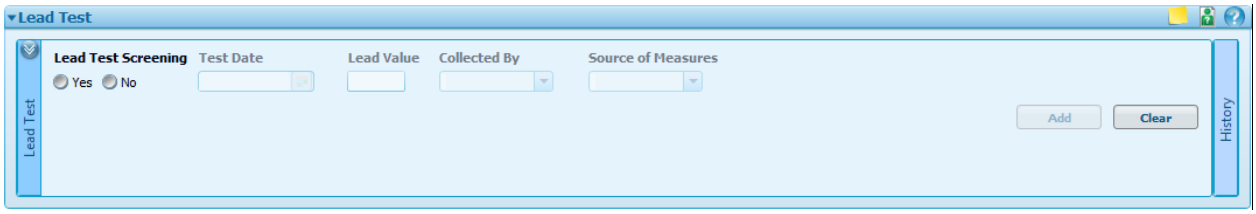


Bloodwork is not system required for an infant less than nine (9) months of age. However, consult your state's policy to see if exceptions apply.

Selecting a Deferred Reason, when bloodwork is due, postpones the requirement. An alert is added to the family record automatically.

Selecting an Exempt Reason, when bloodwork is due, enables a user to bypass entering a bloodwork value and satisfies the requirement for the Certification period.

7. Complete the **Lead** for the infant, if applicable.



Click on the Growth Grid button at the bottom of the screen to view and/or generate growth/weight gain graphs. The system will plot all recorded height, weight, and BMI on a variety of gender and age specific standard growth grids. The participant's age (or gestation weeks for the pregnant woman) at the time of the measurement is calculated and used for plotting. The head circumference for age is calculated and displays as well.

The system contains the following read only reference tables to support growth grids for infants and children:

BMIToAge

HCToAge

LengthToAge

StatureToAge

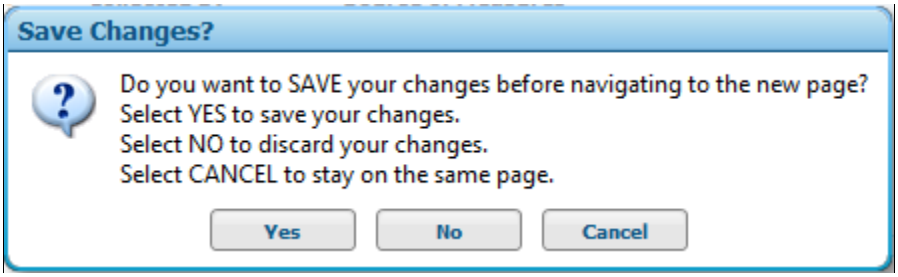
WeightToAge

WeightToLength

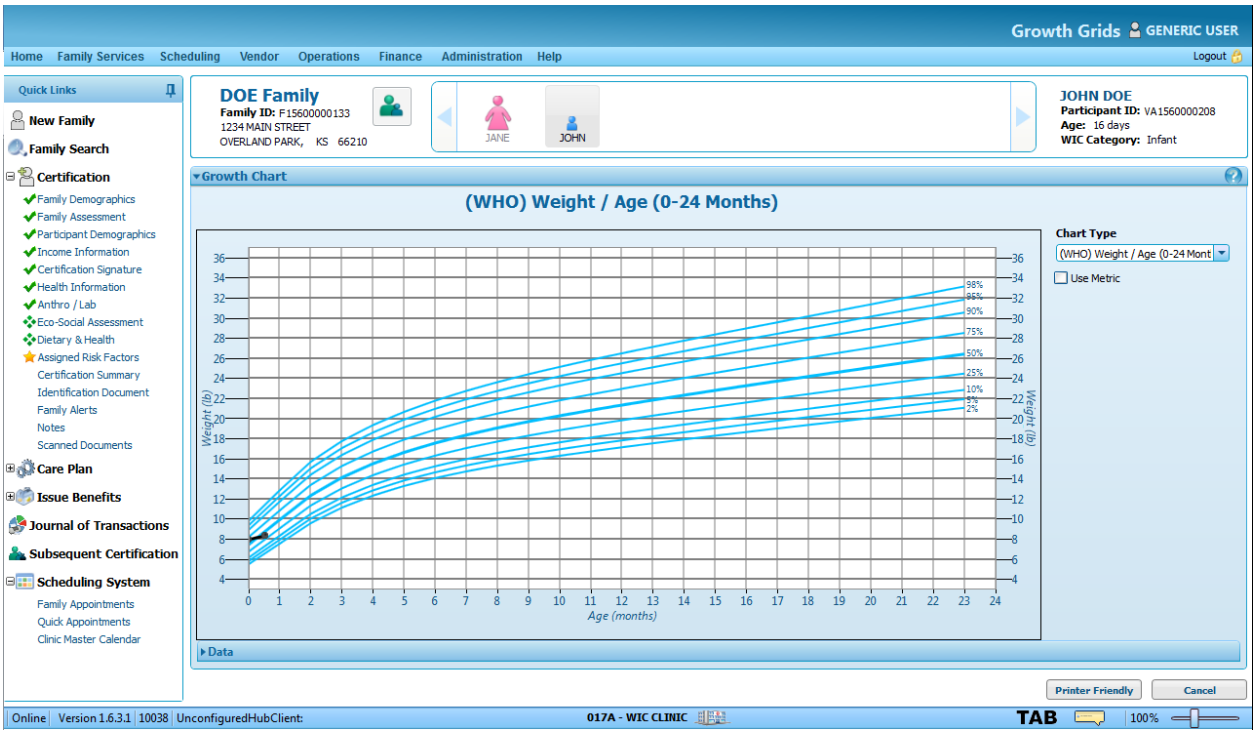
WeightToStature

The fields contained in the reference tables refer to a GrowthStatistic ID and display the Gender and the AgeInMonths.

8. Click **Growth Grids** to view growth grid charts. A confirmation screen displays prompting you to save your changes.



9. Click **Yes** to save changes. The **Growth Grids** screen displays.

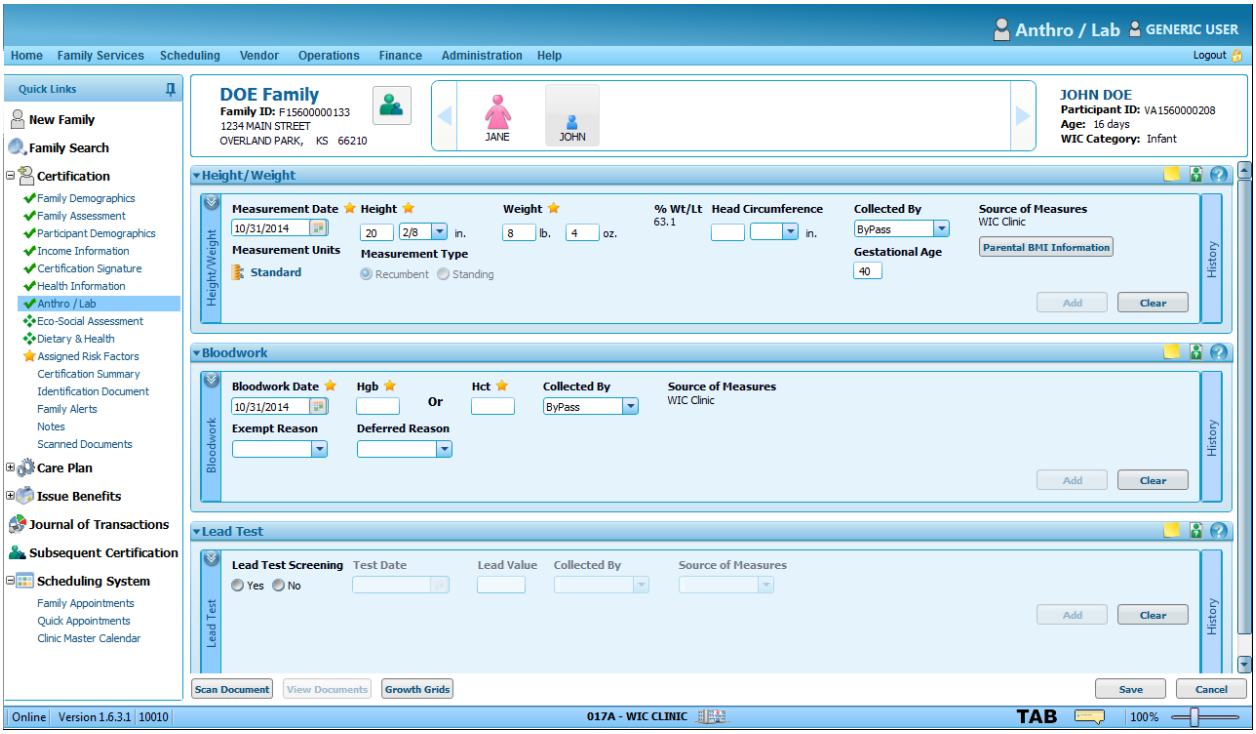


Use the Chart Type drop down list to view various growth grids.

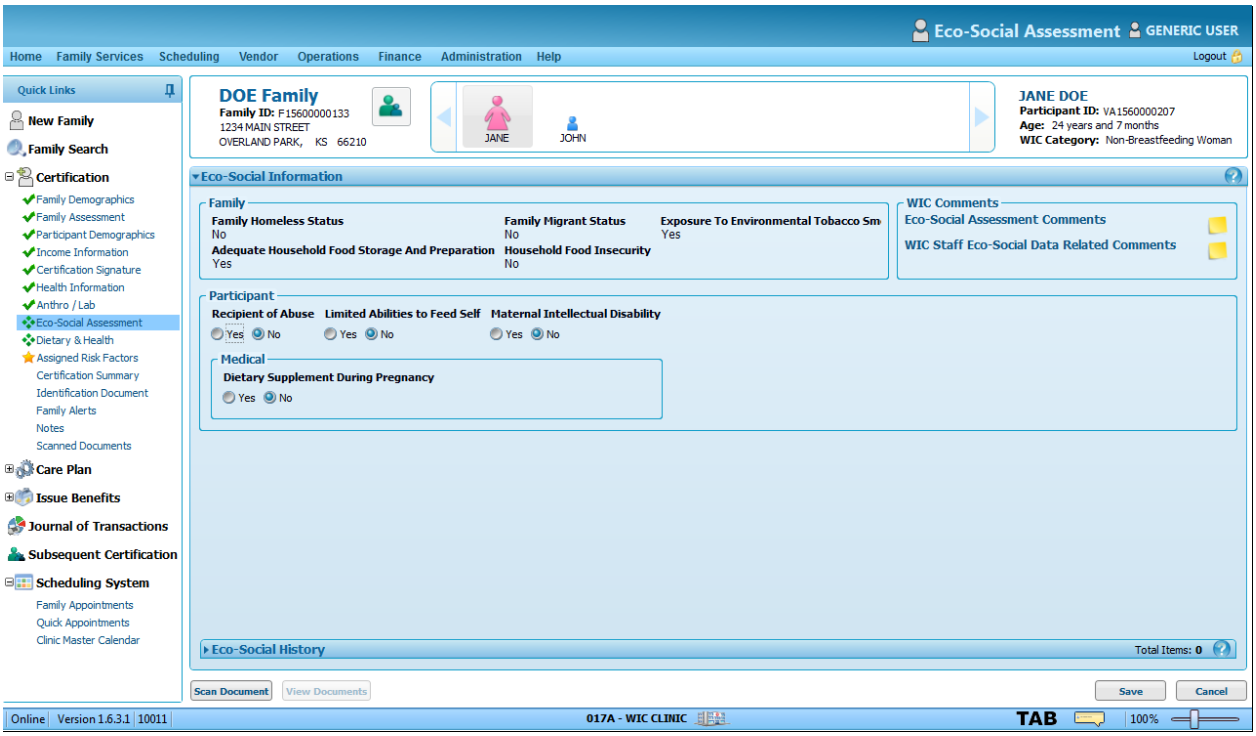
Expand the Data container to view the data used to plot the growth grid points.

Click the Printer Friendly button to display the selected growth grid in a printer friendly format.

10. Click **Cancel** to dismiss the **Growth Grids** screen and to return to the screen.



11. Click **Save**. The system saves any changes and navigates you to the next screen in the process.

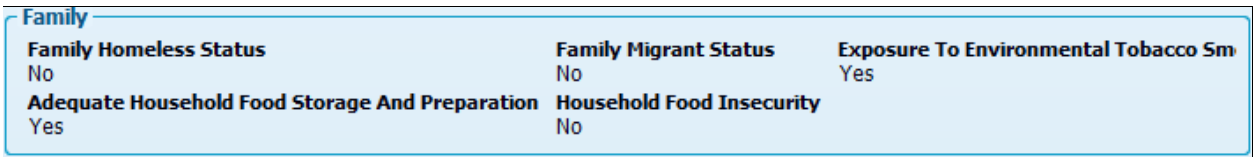


Task H. Certifying the Family – Eco-Social Assessment Screen

As with the **Participant Demographics**, **Health Information**, and **Anthro/Lab** screens, the **Eco-Social Assessment** screen must be completed separately for each family member.

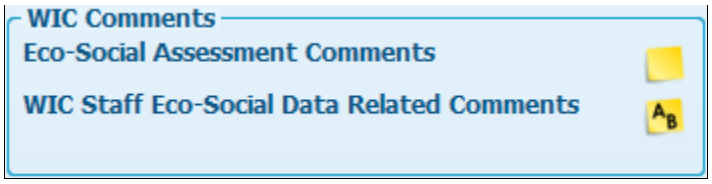
Complete the following steps to perform this task:

1. View the **Family** group box for the woman.

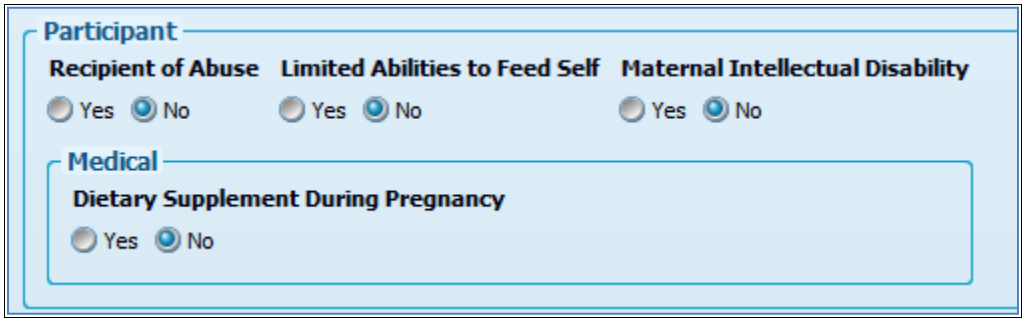


The values displayed within this group box are read-only. To change or edit the values, update previously completed screens (i.e.: Family Demographics and/or the Family Assessment screen).

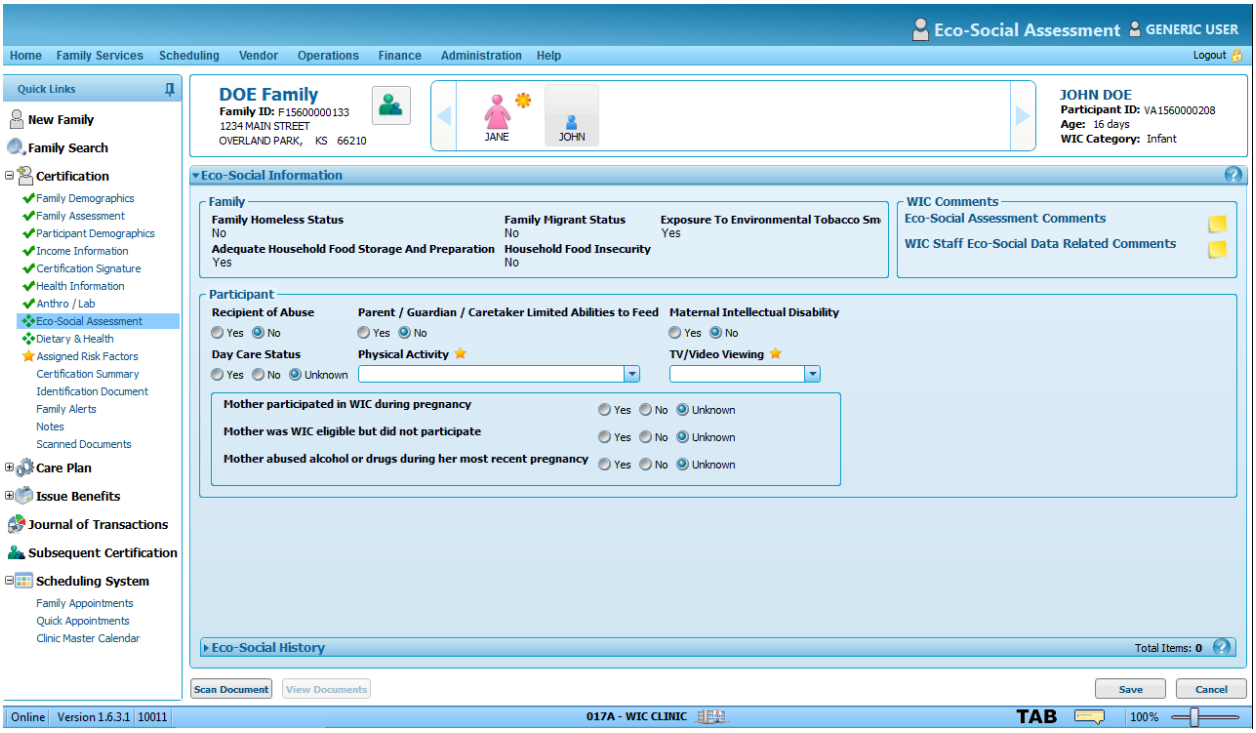
2. Complete the **WIC Comments** section for the woman.



3. Complete the **Participant/Medical** group box for the woman.

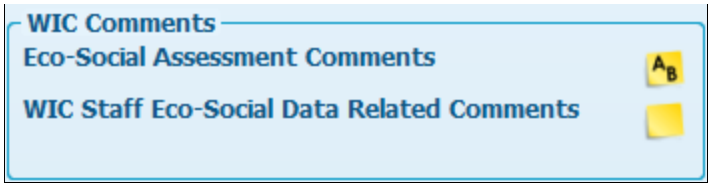


4. Select the infant member icon within the family header. The **Eco-Social Assessment** screen displays for the infant.



5. Complete the **Family** section for the infant. All changes must be made on the **Health Assessment** screen.

6. Complete the **WIC Comments** section for the infant.



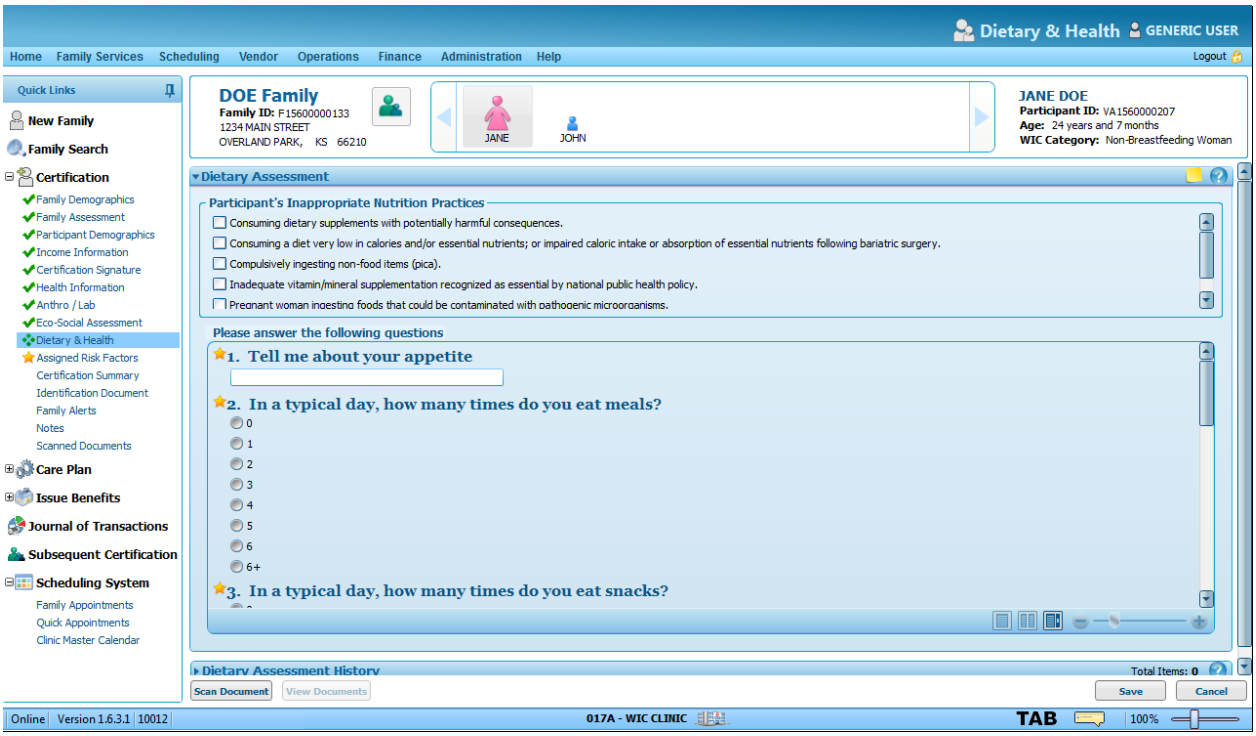
7. Complete the **Participant** section for the infant.

Risk factor 701 is added to the list of assigned risk factors if the infant is less than six months of age and Yes is answered for either of the following questions:

Mother participated in WIC during pregnancy

Mother was WIC eligible but did not participate

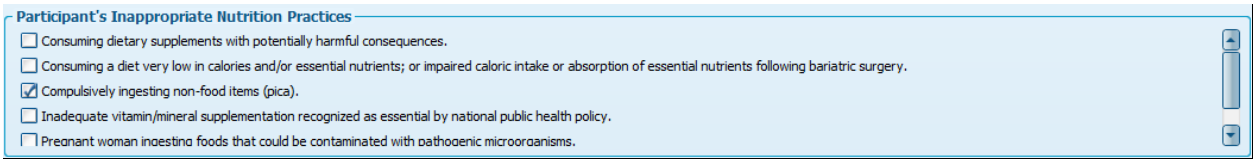
8. Click **Save**. A status message displays indicating success and you are navigated to the next screen.



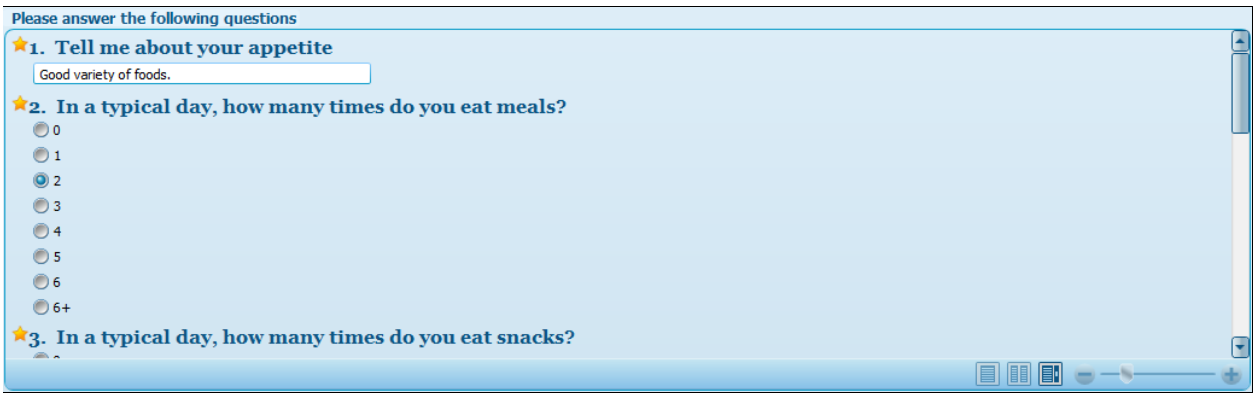
Task I. Certifying the Family – Dietary & Health Screen

Complete the following steps to perform this task if required by your state:

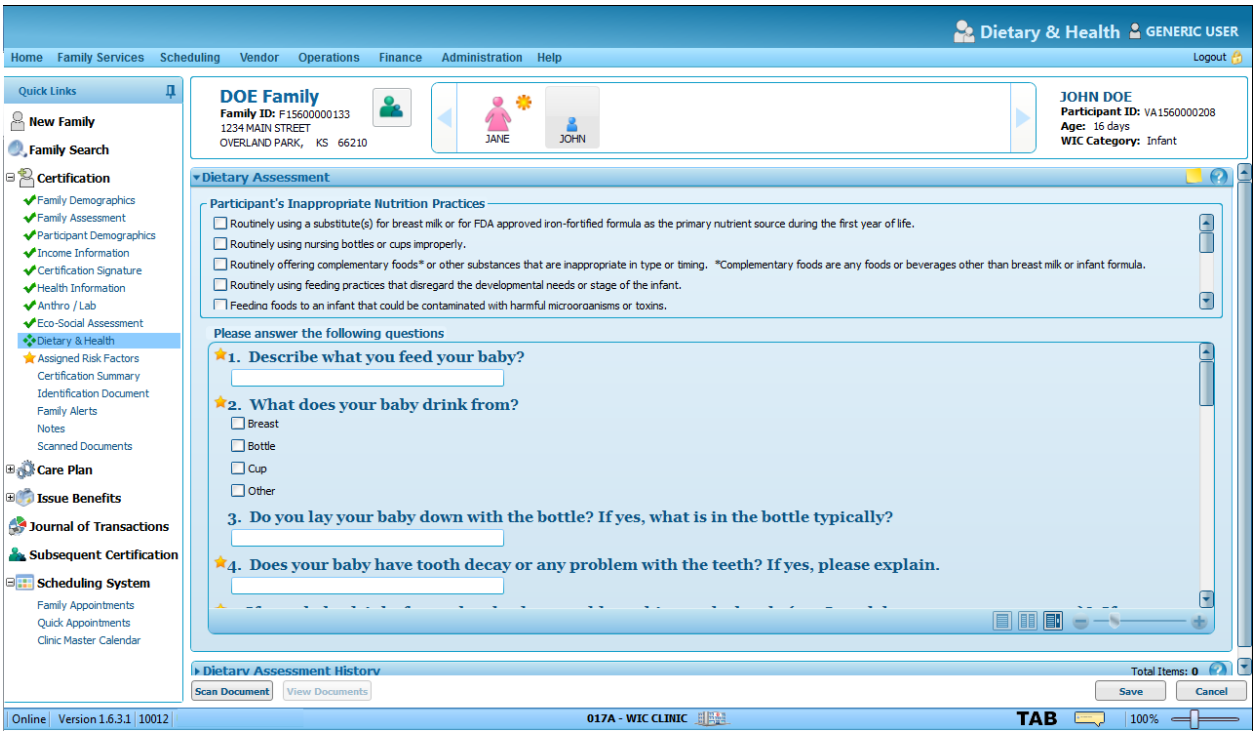
1. Complete the **Participant's Inappropriate Nutrition Practices** section for the woman.



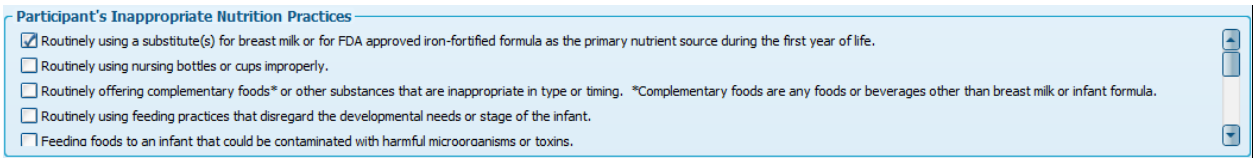
2. Complete the **Please answer the following questions** section for the woman. (These questions are state defined and all required questions must be answered.)



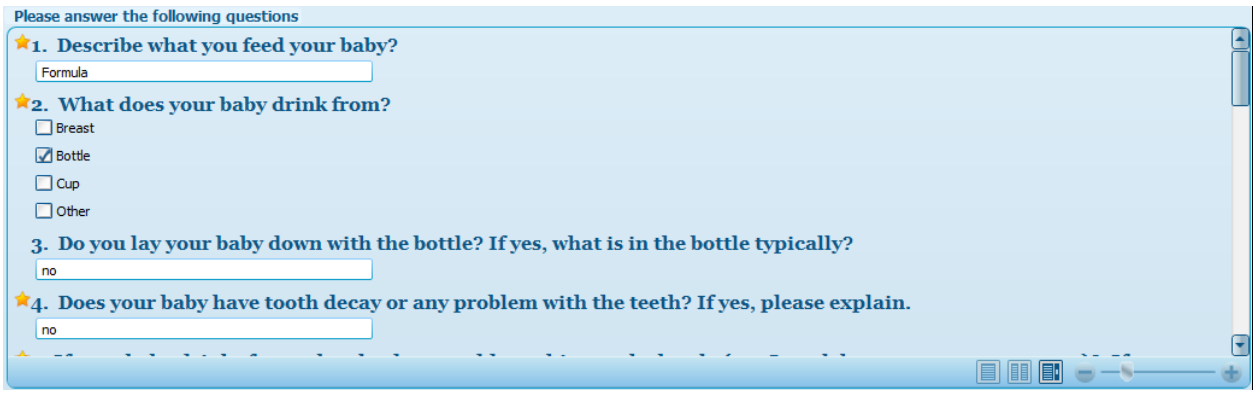
3. Select the infant member icon within the **Family Header**. The **Dietary & Health** screen displays for the infant.



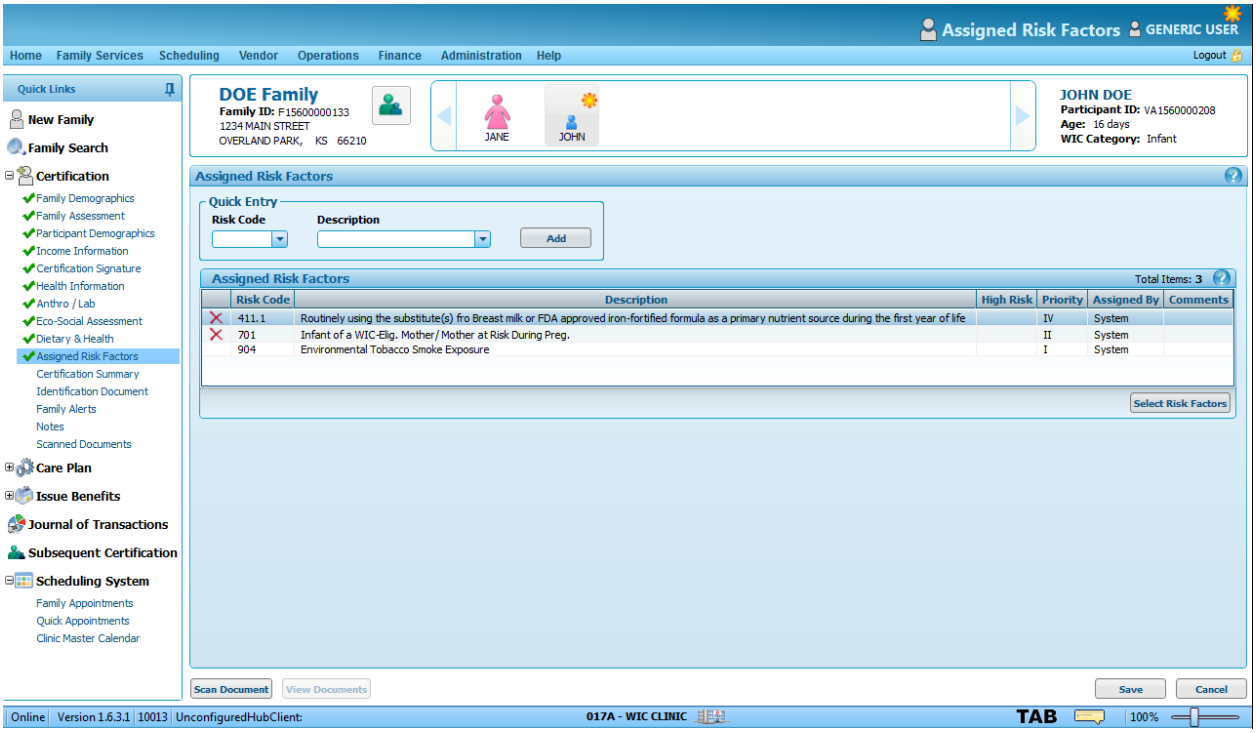
4. Complete the **Participant's Inappropriate Nutrition Practices** section for the infant.



5. Complete the **Please answer the following questions** section for the infant. (These questions are state defined and all required questions must be answered.)



6. Click **Save**. A status message displays indicating success and you are navigated to the next screen.



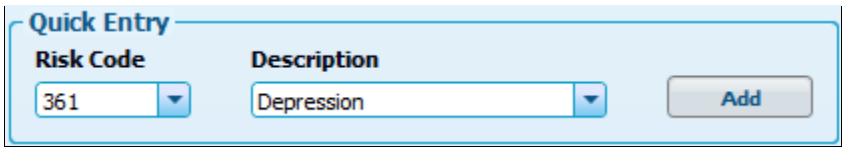
Task J. Certifying the Family – Assigned Risk Factors Screen

As with the **Participant Demographics**, **Health Information**, **Anthro/Lab**, **Eco-Social Assessment**, and the **Dietary & Health** screen, the **Assigned Risk Factors** screen must be completed separately for each family member. Note: This screen is state configurable.

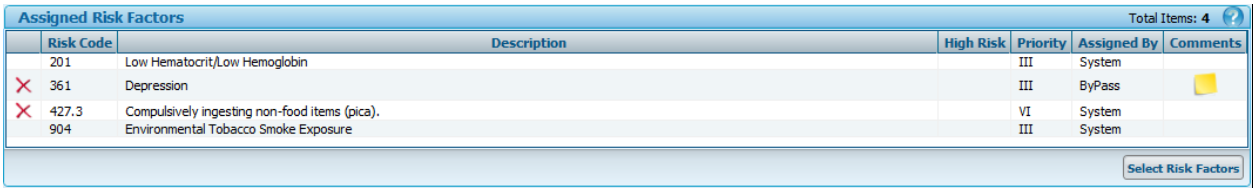
Complete the following steps to perform this task:

1. Complete the **Assigned Risk Factors** screen for the woman by doing one or more of the following:

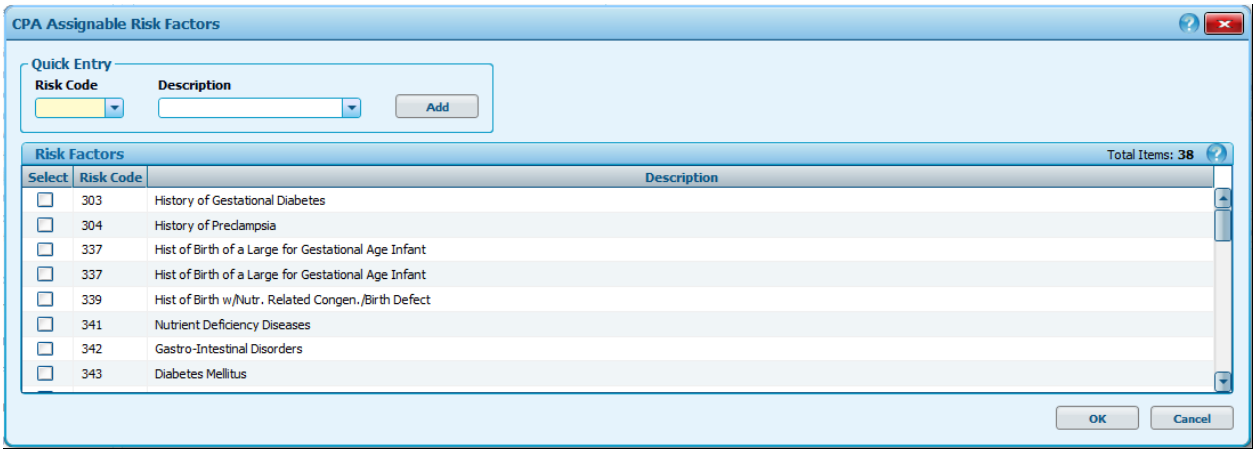
   a. Select a **Risk Code** or **Description**, as necessary.



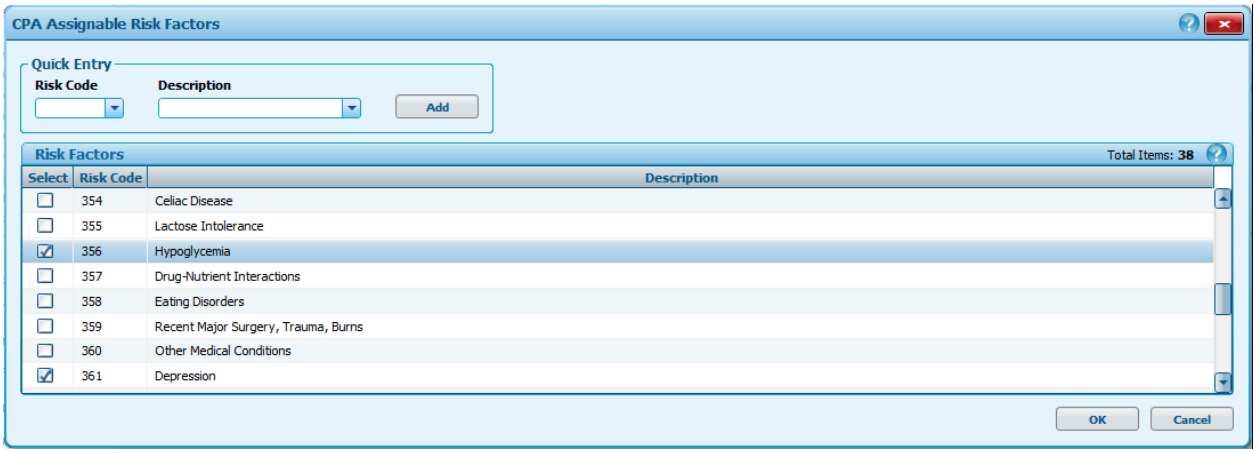
2. Click **Add**. The selected **Risk Code/Description** is added to the **Assigned Risk Factors** grid.



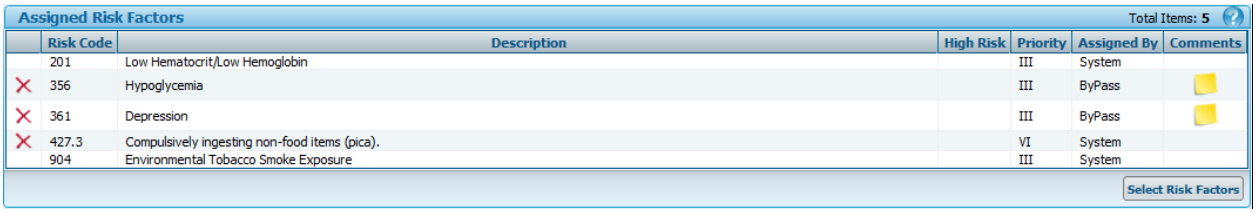
3. Click **Select Risk Factors** if additional risk factors are identified outside of the system-defined risk factors. The **CPA Assignable Risk Factors** screen displays.



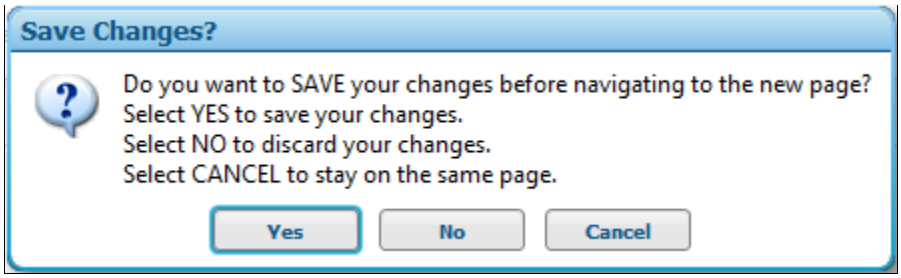
4. Select all applicable risk factors from within the **Risk Factors** grid.



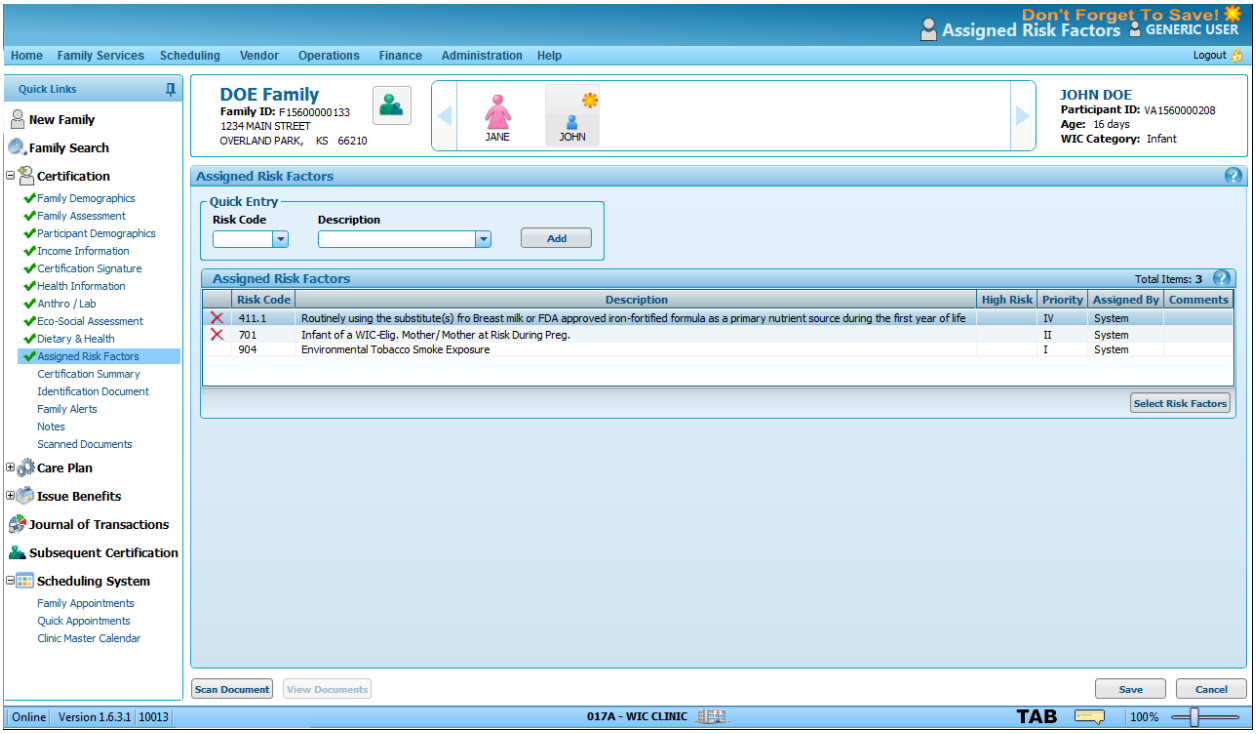
5. Click **OK**. The **Risk Factors** screen displays and the **Assigned Risk Factors** grid is updated.



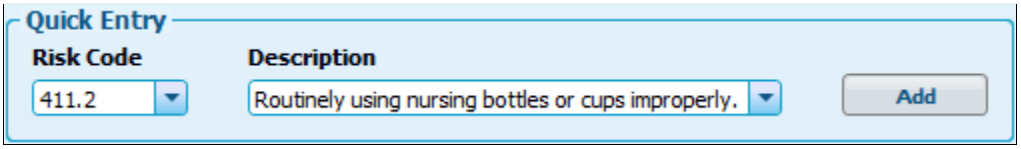
6. Select the infant member icon within the **Family Header**. A confirmation screen displays prompting you to save your changes.



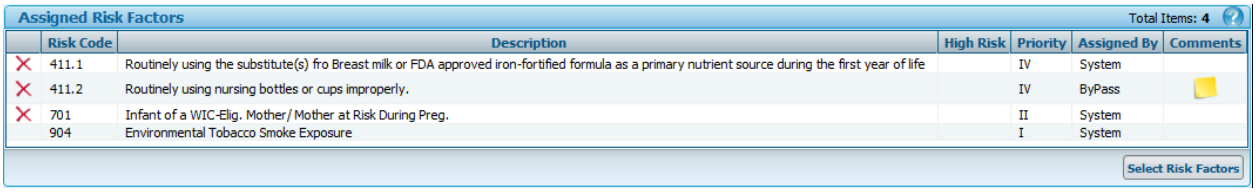
7. Click **Yes** to save changes. The **Assigned Risk Factors** screen displays for the infant.



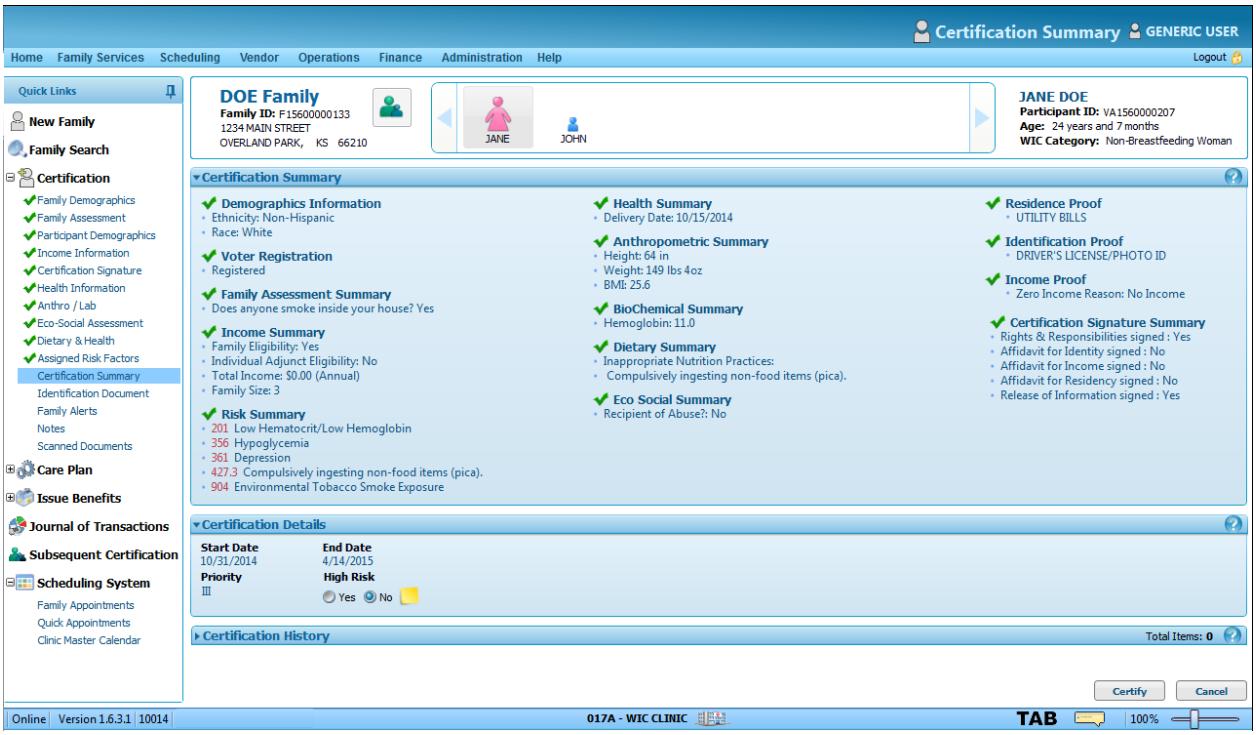
8. Complete the **Assigned Risk Factors** screen for the infant.



9. Click **Add**. The screen refreshes and the risk factor displays on the **Assigned Risk Factors** grid.



10. Click **Save**. A status message displays indicating success and you are navigated to the next screen.



Task K. Certifying the Family – Certification Summary Screen

The **Certification Summary** screen displays a summary of the entire certification process. Under the **Certification Summary** section, each screen of the **Certification** process is represented along with information specific to each screen. In addition, the **Certification Summary** screen indicates the completion status of each screen. A green **Checkmark** icon (✔) indicates the screen has been completed while the **Required Information** icon (★) indicates a required screen that has not been completed.

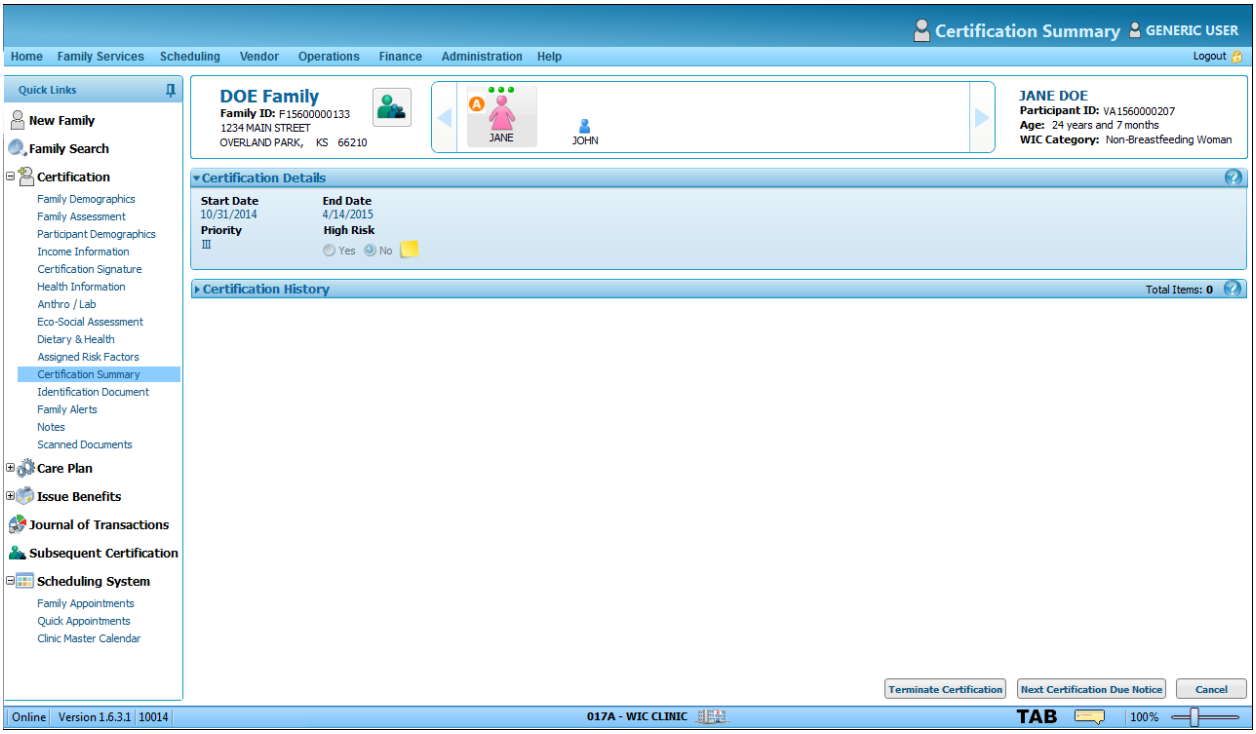
Under **Certification Details**, information such as the **Start Date**, **End Date**, **Priority**, and a **High Risk** indicator (H) displays for each member.

Complete the following steps to perform this task:

Take a moment to review the member's **Certification Summary** screen for accuracy and completeness. Once you are satisfied that the information displayed is accurate and complete, you will complete the next Step.

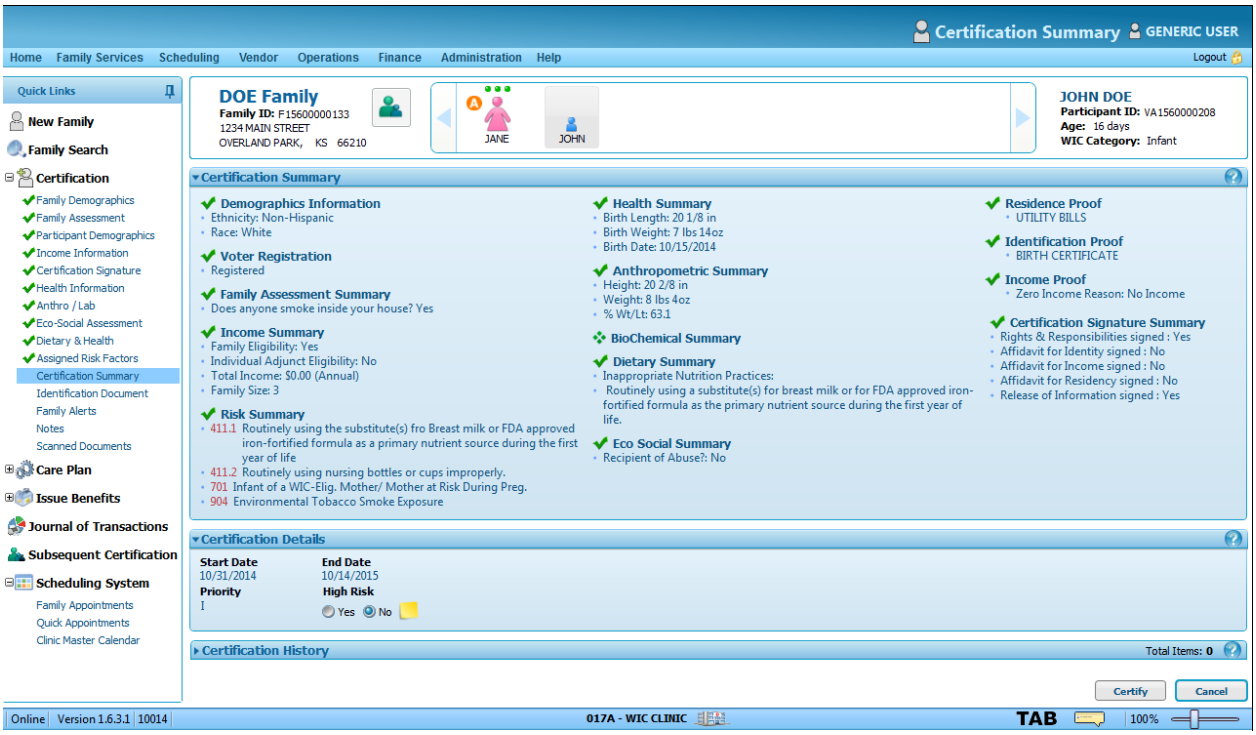
> If Certification information is missing or incomplete, simply click the desired screen link to return to the screen and make changes as necessary. Return to the Certification Summary screen when you are ready to complete the Certification.

1. Click **Certify** to complete the certification process for the woman. A status message displays indicating success and the **Certification Summary** screen refreshes.



The green Checkmark icon (✔) next to each link has been removed and the Active Certification Indicator (A) is displayed on the member's icon in the Family Header. This Certification process is complete for the member.

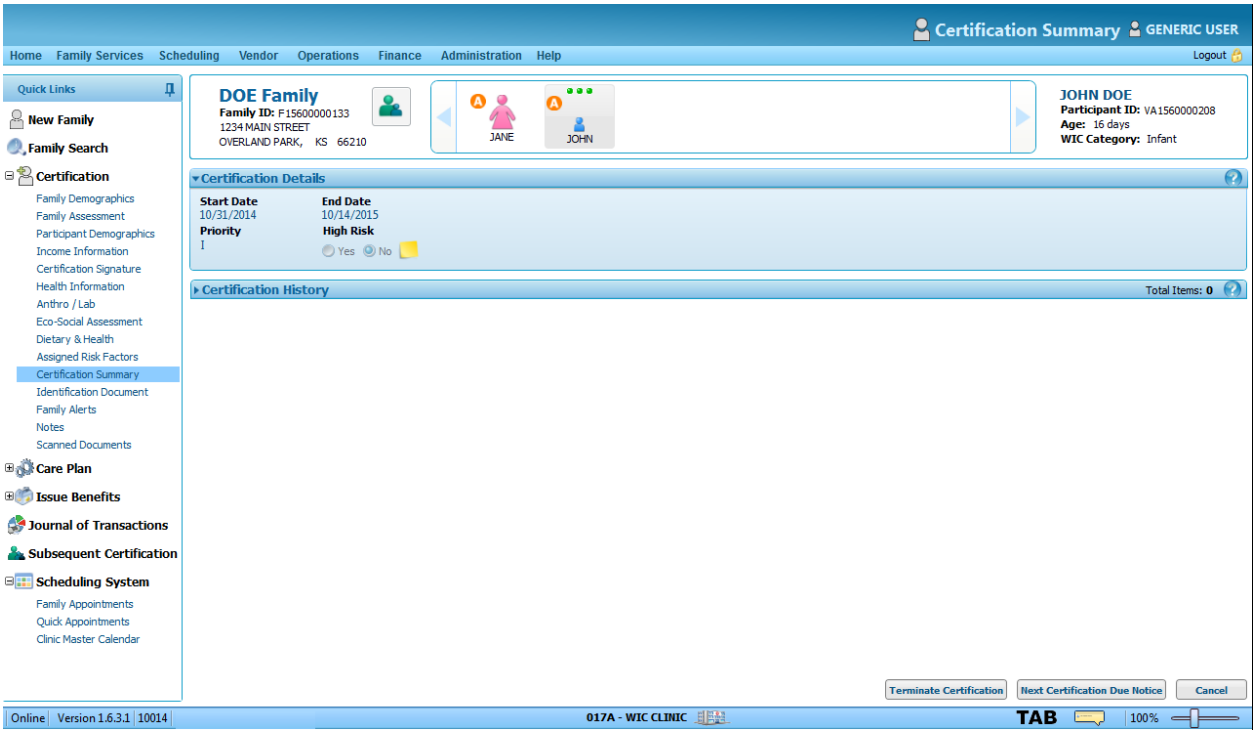
2. Select the infant member icon within the family header. The **Certification Summary** screen displays for the infant.



3. Review the **Certification Summary** screen for the participant to ensure the certification's accuracy.

If Certification information is missing or incomplete, click the desired screen link to return to the screen and make changes as necessary. Return to the Certification Summary screen when you are ready to complete the Certification. This can be done by clicking the Cancel button on the screen you navigated to complete.

4. Click **Certify** to complete the certification process for the infant.



Congratulations!

You have successfully completed the **Certifying a Non-Breastfeeding Woman and Infant** process.

Issuing EBT Cards

The WIC program delivers food benefits in the form of an **Electronic Benefits Transfer (EBT)** card. Each card has a **Primary Account Number (PAN)** and can be accessed by the client with a **Personal Identification Number (PIN)**. Food benefits issuance for up to three months may be delivered to the WIC participant via **EBT**.

Each family will have an **Electronic Benefit Account (EBA)**. Food benefits issued to each individual for a given benefit month are aggregated for the family for the benefits month. The client may view the current EBA balances for food categories/subcategories assigned to the **PAN** as a shopping list by placing the card in a card reader device or by requesting the current account balance from the EBT Provider system.

If the card is lost or damaged, the card may be deactivated and replaced. A card that is lost can be placed in a hot card status as a notification that the card is not to be used, if applicable.

The Local Agency and Clinic must be EBT enabled prior to performing the training scenarios.

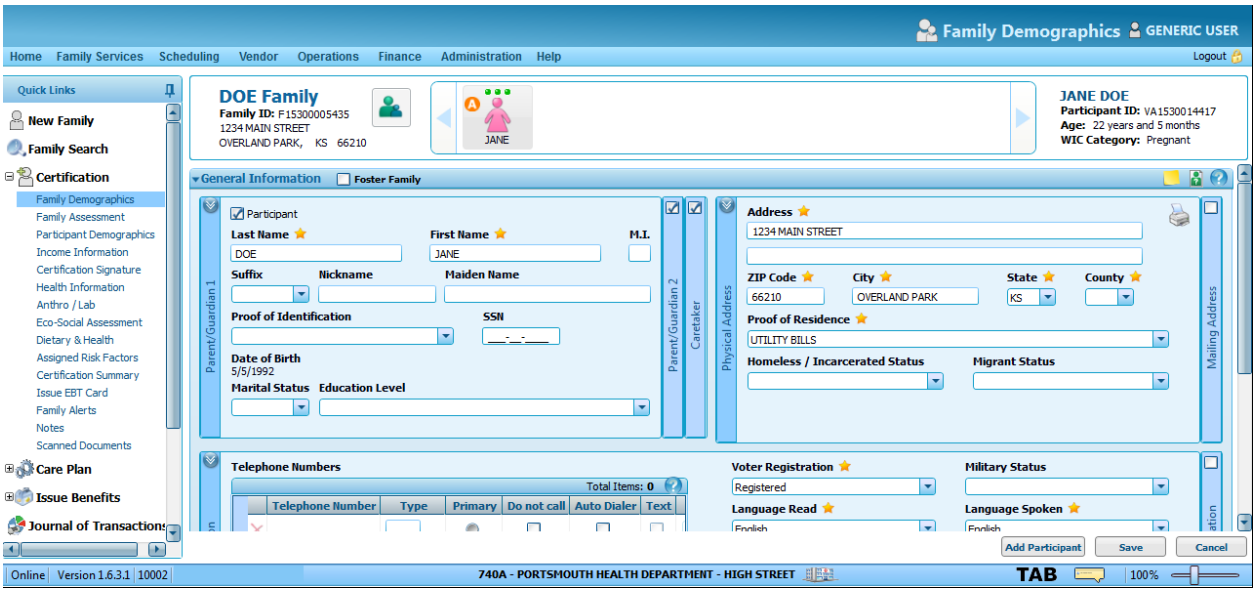
This process includes the following task(s):

Task A. Issue an EBT Card **5-101**
Task B. Deactivate EBT Cards **5-104**
Task C. Replace an EBT Card **5-106**

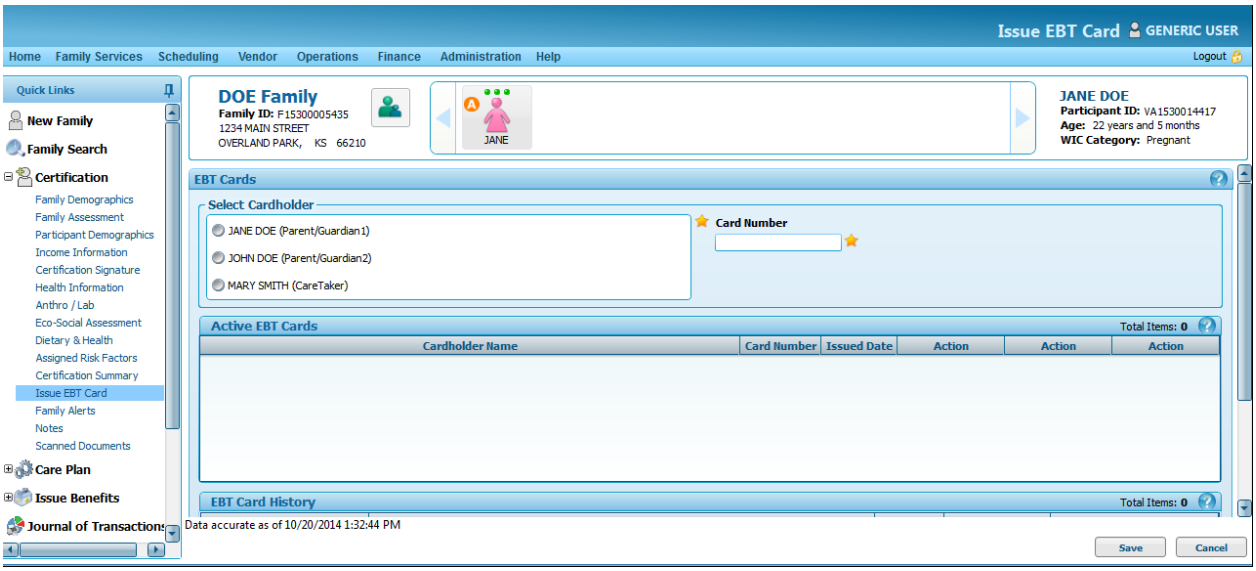
Task A. Issue an EBT Card

Complete the following steps to perform this task:

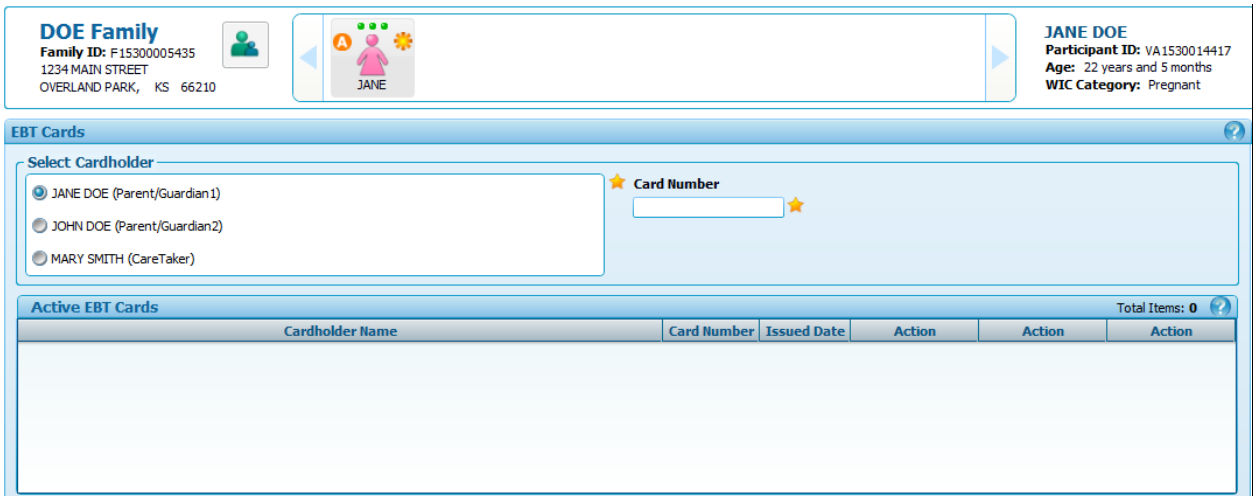
1. Search for and access a family participant record.



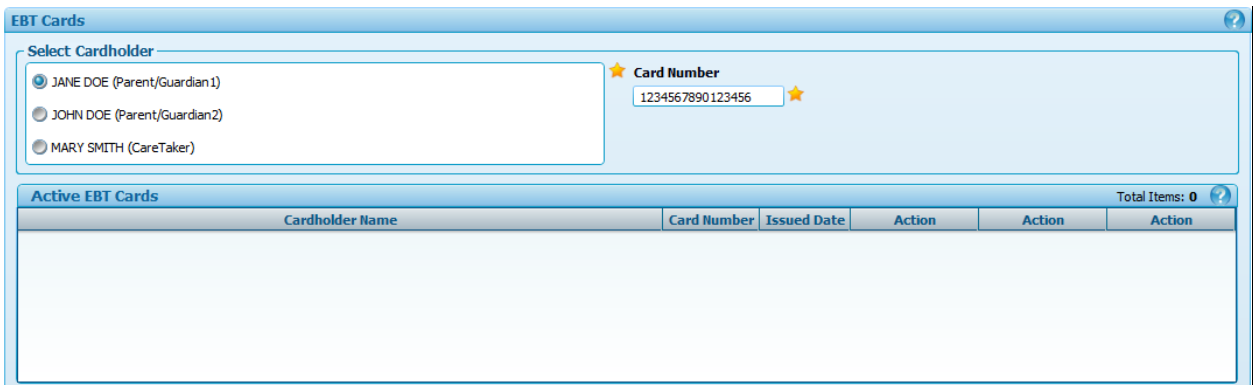
2. Go to **Family Services→Certification→Issue EBT Card**. The **Issue EBT Card** screen displays.



3. Select who will serve as the EBT cardholder under **Select Cardholder**.

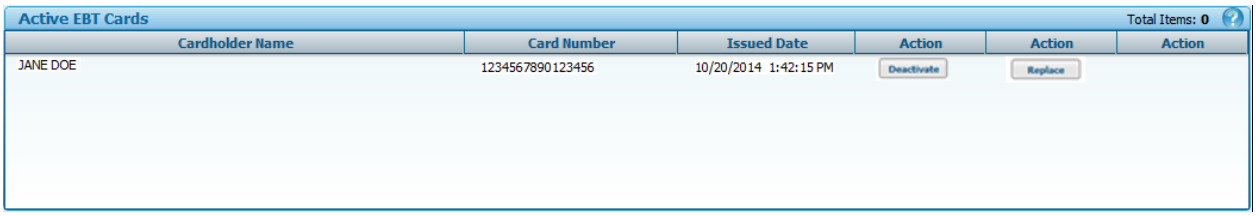


4. Ensure the cursor is located within the **Card Number** text box and then enter the card number or swipe the card through the card reader attached to the computer.



In some cases, the selected cardholder is changed unintentionally if an EBT card is swiped through a card reader before the cursor is placed within the Card Number text box. Therefore, always place the cursor in the Card Number text box prior to swiping an EBT card.

5. Click **Save**. The status message displays that the **EBT Card** was issued successfully.

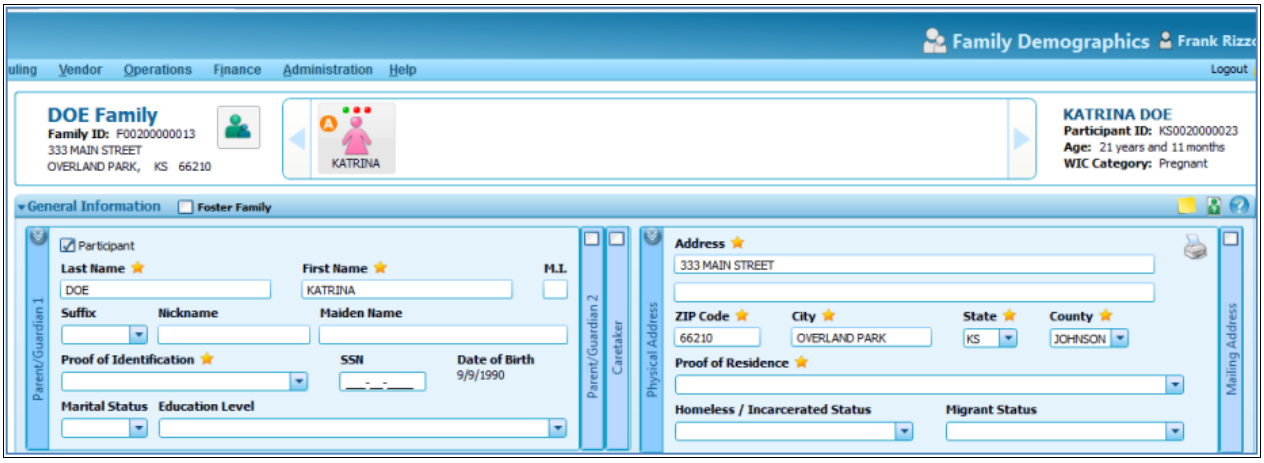


The current active benefits can be redeemed from a participating retailer. The food item is scanned and must match the UPC and PLU code linked to that food category/subcategory assigned to the Primary Account Number (PAN).

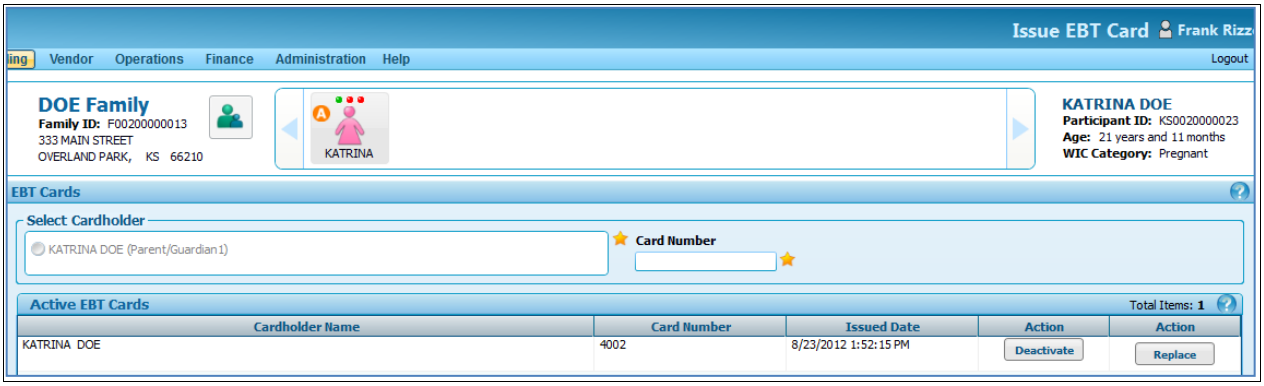
Task B. Deactivate EBT Cards

Complete the following steps to perform this task:

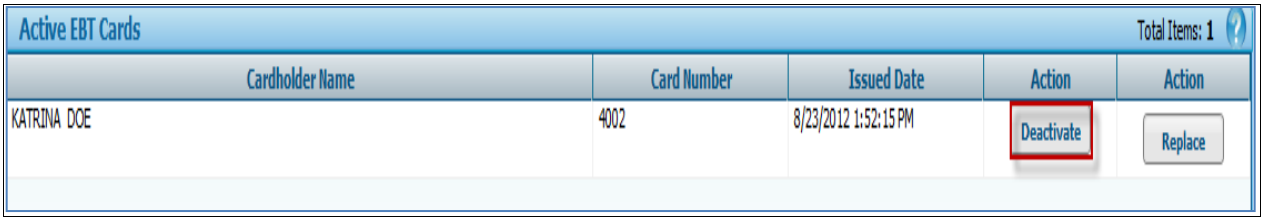
1. Search for and access a family participant record.



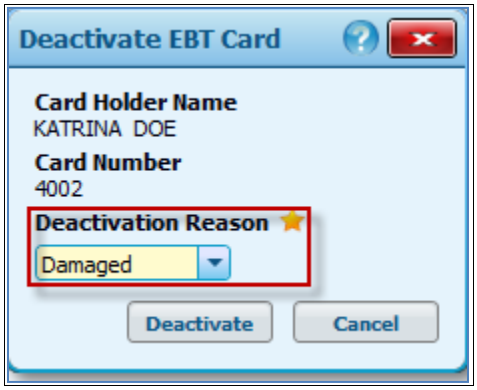
2. Go to **Family Services → Certification→Issue EBT Card**. The **Issue EBT Card** screen displays.



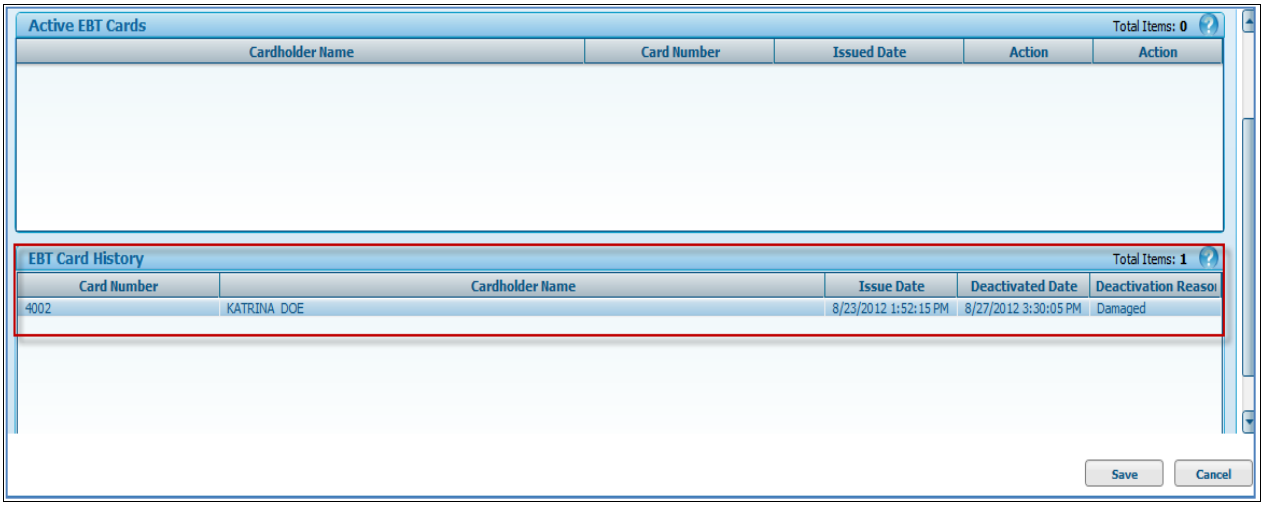
3. Click Deactivate within the **Active EBT Cards** grid. The **Deactivate EBT Card** screen displays.



4. Select a reason from the **Deactivation Reason** drop down list box.



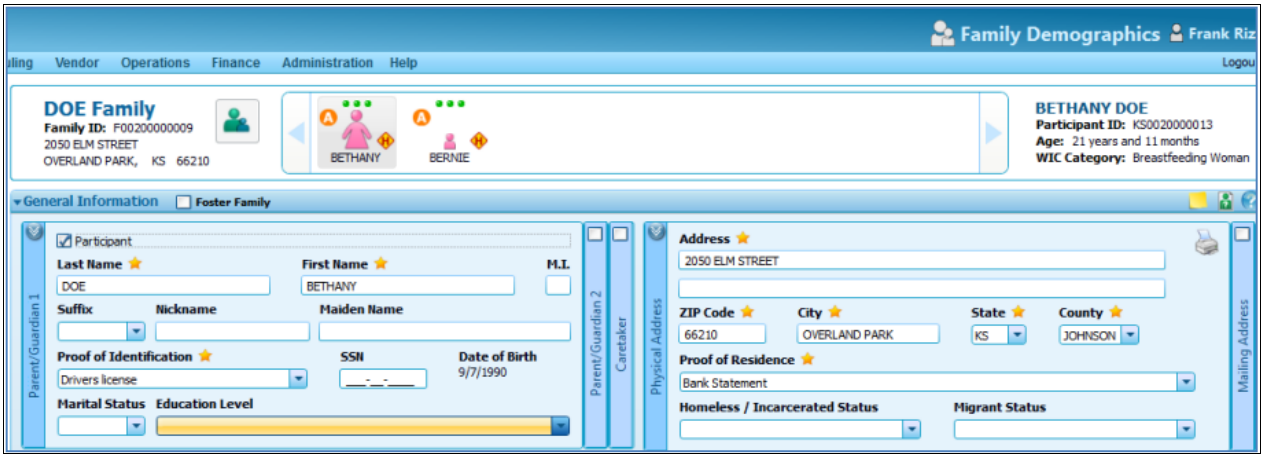
5. Click **Deactivate**. The status message displays that the **EBT Card** was deactivated successfully. The **EBT Card** no longer displays on the **Active EBT Cards** grid, it now displays on the **EBT Card History** grid.



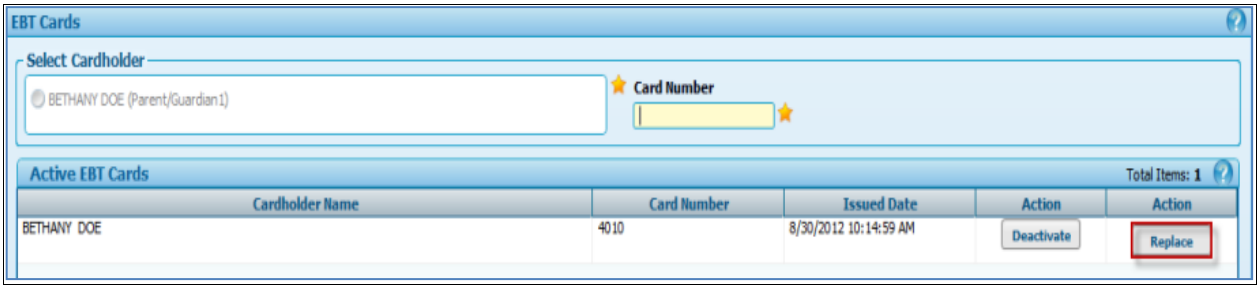
Task C. Replace an EBT Card

Complete the following steps to perform this task:

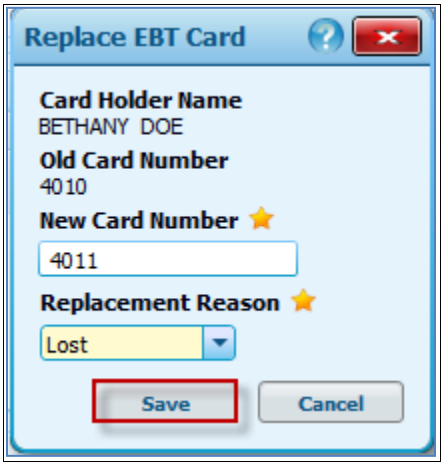
1. Search and access a family participant record.



2. Go to **Family Services → Certification → Issue EBT Card**. The **Issue EBT Card** screen displays.



3. Click **Replace**. The **Replace EBT Card** screen displays.
4. Select reason from the **Replacement Reason** drop down list box. The screen refreshes and returns to the **Issue EBT Card** screen.



Congratulations!

You have successfully completed the **Issuing EBT Cards** process.

Family Alerts

The **Family Alerts** screen is used to create and manage alerts for an individual family member and/or the entire family. Each alert will have a start and end date. Active alerts are initially displayed in descending, chronological order by alert start date. When the record is retrieved, the alert displays. Multiple alerts can be created for a family or individual. If the alert is set at the individual level, then the alert pop up window opens only when the particular participant's record is open. If the alert is set at the family level, then anytime any participant record in that family is accessed, the alert pop up window opens before the participant's record is open.

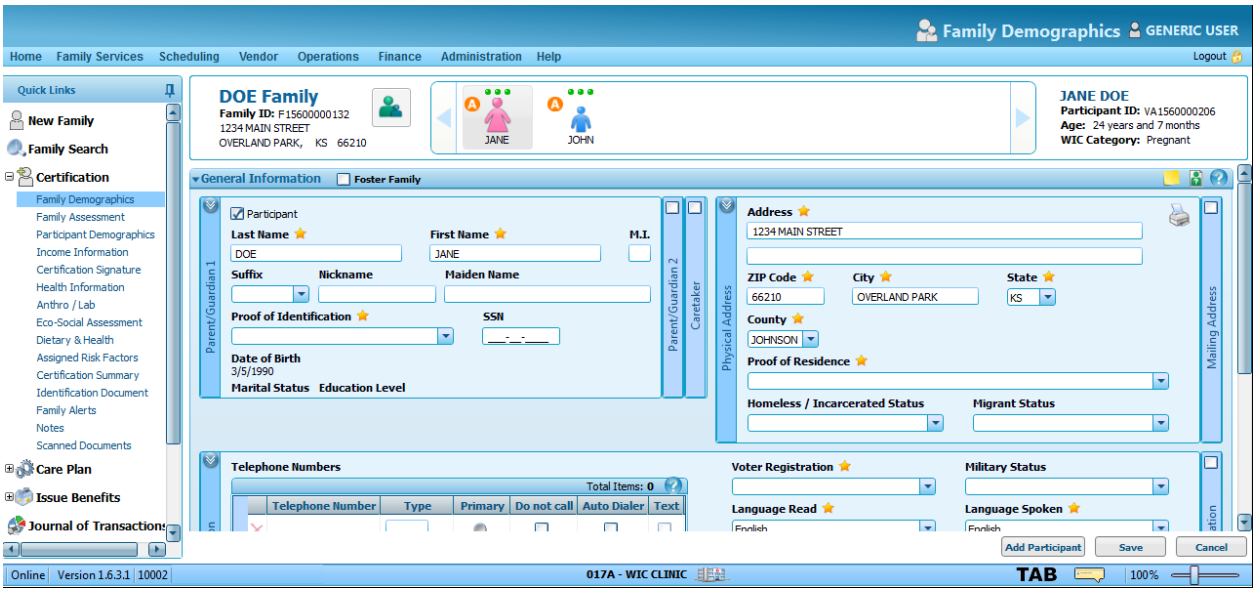
This process includes the following task(s):

Task A. Adding Alerts **5-109**
Task B. Inactivating Alerts **5-114**
Task C. Editing an Alert **5-116**

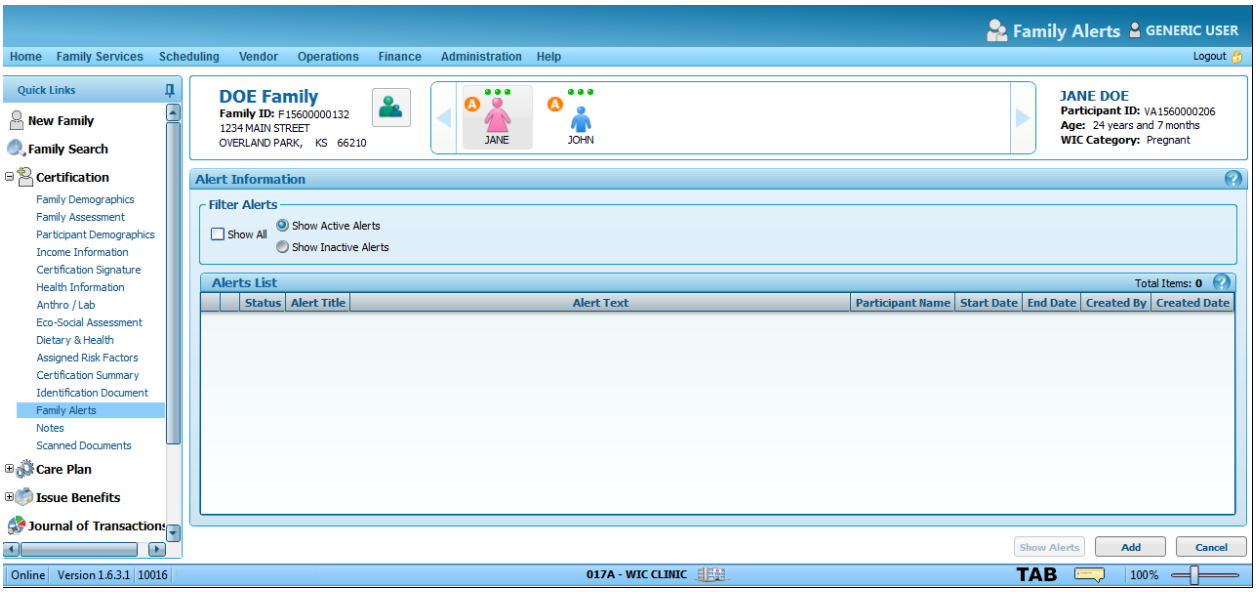
Task A. Adding Alerts

Complete the following steps to add a family alert:

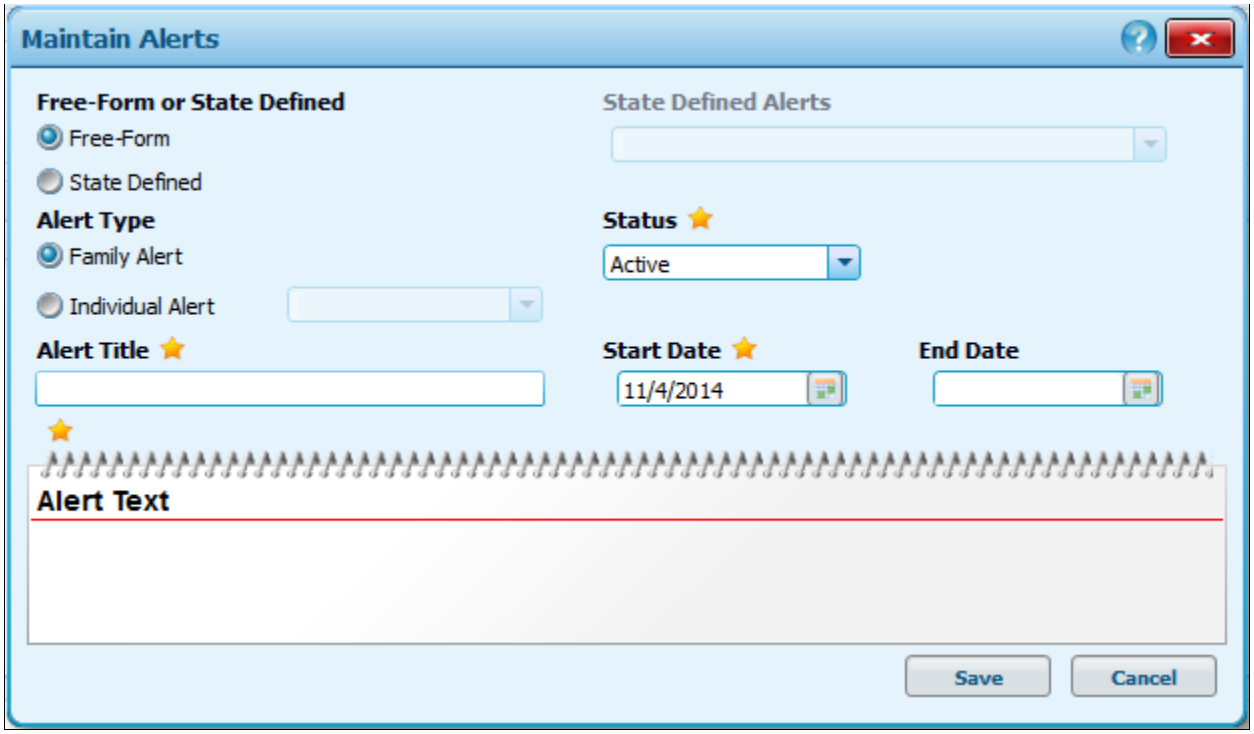
1. Access (or open) the desired family record. The Family Demographics screen displays.



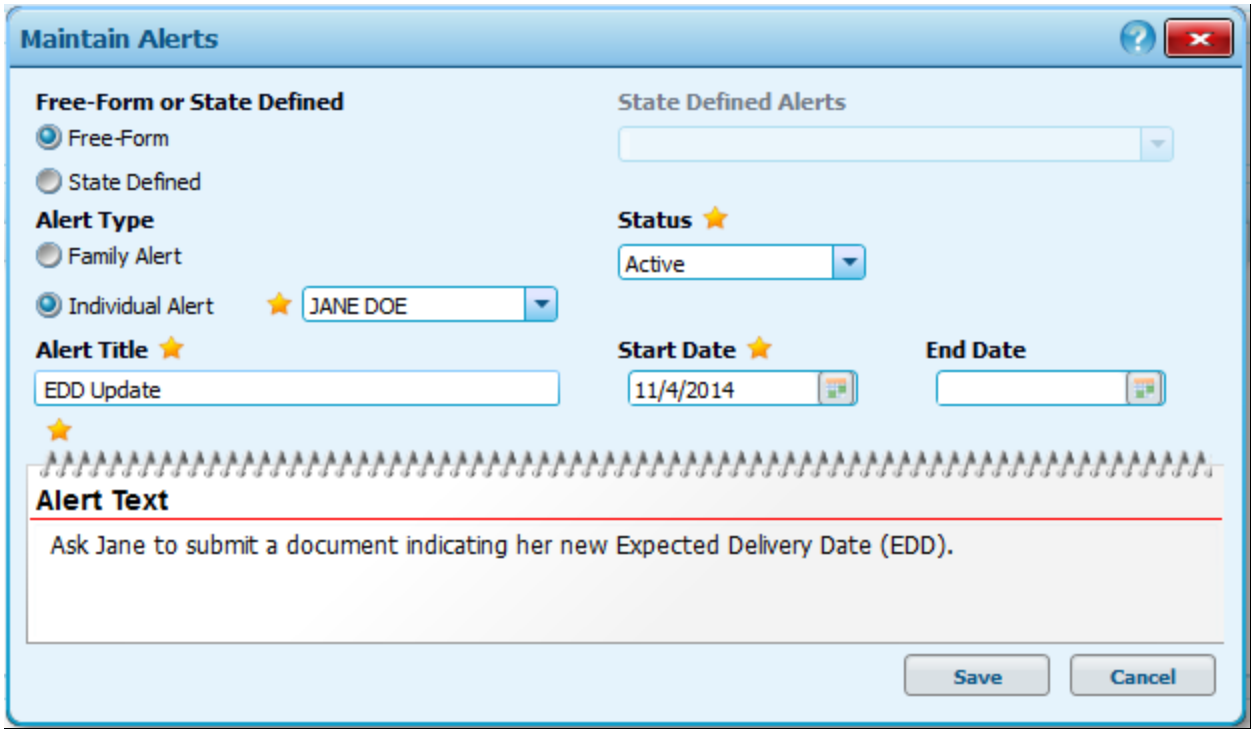
2. Go to **Quick Links → Certification → Family Alerts**. The **Family Alerts** screen displays.



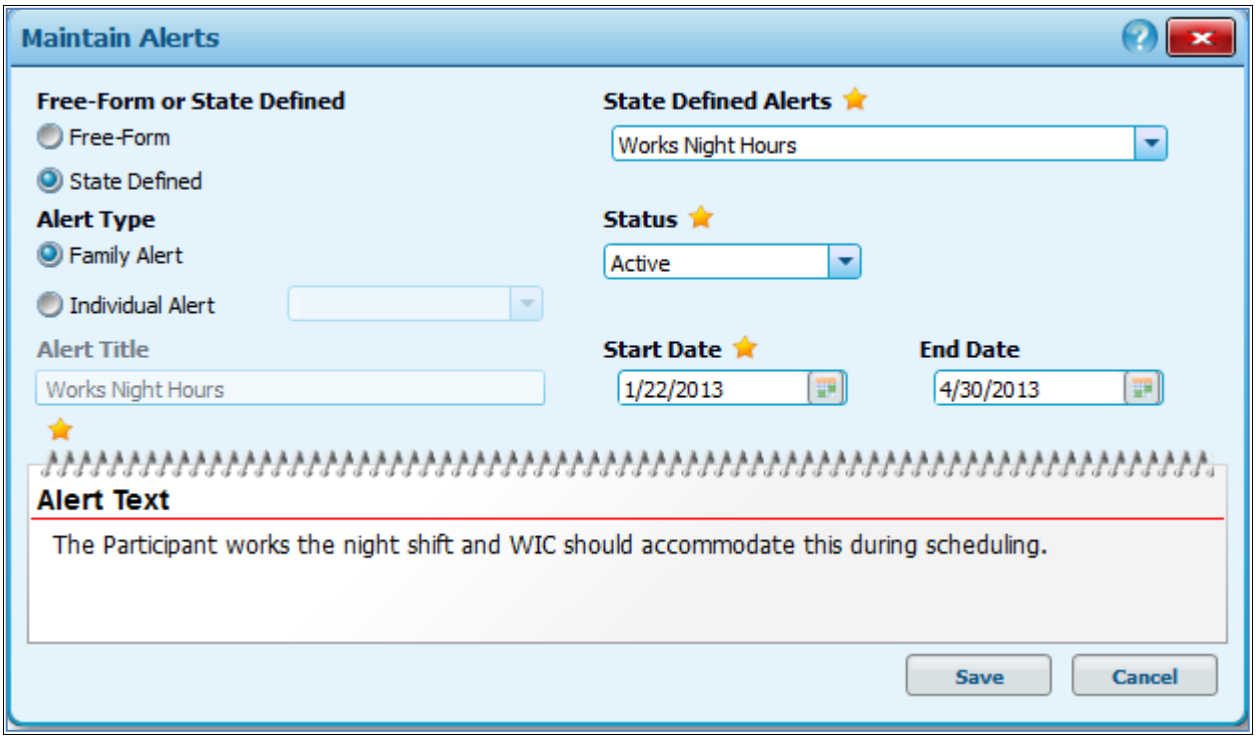
3. Click **Add** to create an alert. The **Maintain Alerts** pop-up screen displays.



4. To create a **Free Form Alert**:
   a. Select the **Free Form** radio button.
   b. Select the **Alert Type** (Family Alert or Individual Alert). If **Individual Alert** is selected, select the individual to which the alert applies using the associated drop down list.
   c. Enter the **Alert Title**.
   d. Select the **Status** of the alert.
   e. Enter or select **Start Date**.
   f. Enter or select **End Date,** if necessary.
   g. Enter the text of the alert in the **Alert Text** section.

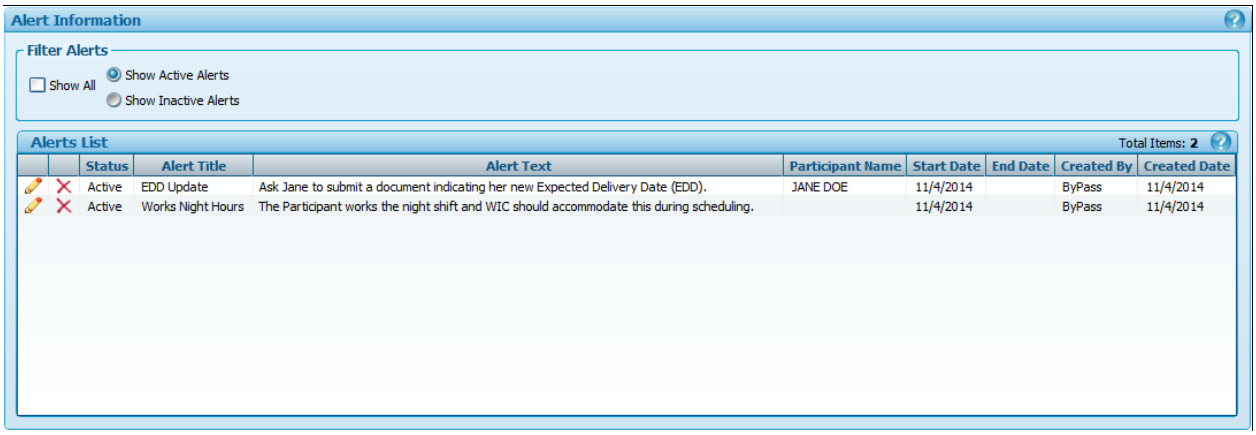


5. To create a **State-defined Alert**:
   a. Select the **State-defined Alert** radio button.
   b. Select the **Alert Type** (Family Alert or Individual Alert). If **Individual Alert** is selected, select the individual to which the alert applies using the associated drop down list.
   c. Select an alert from the **State Defined Alerts** drop-down list.
   d. Select the **Status** of the alert.
   e. Enter or select the **Start Date**.
   f. Enter or select the **End Date,** if necessary.

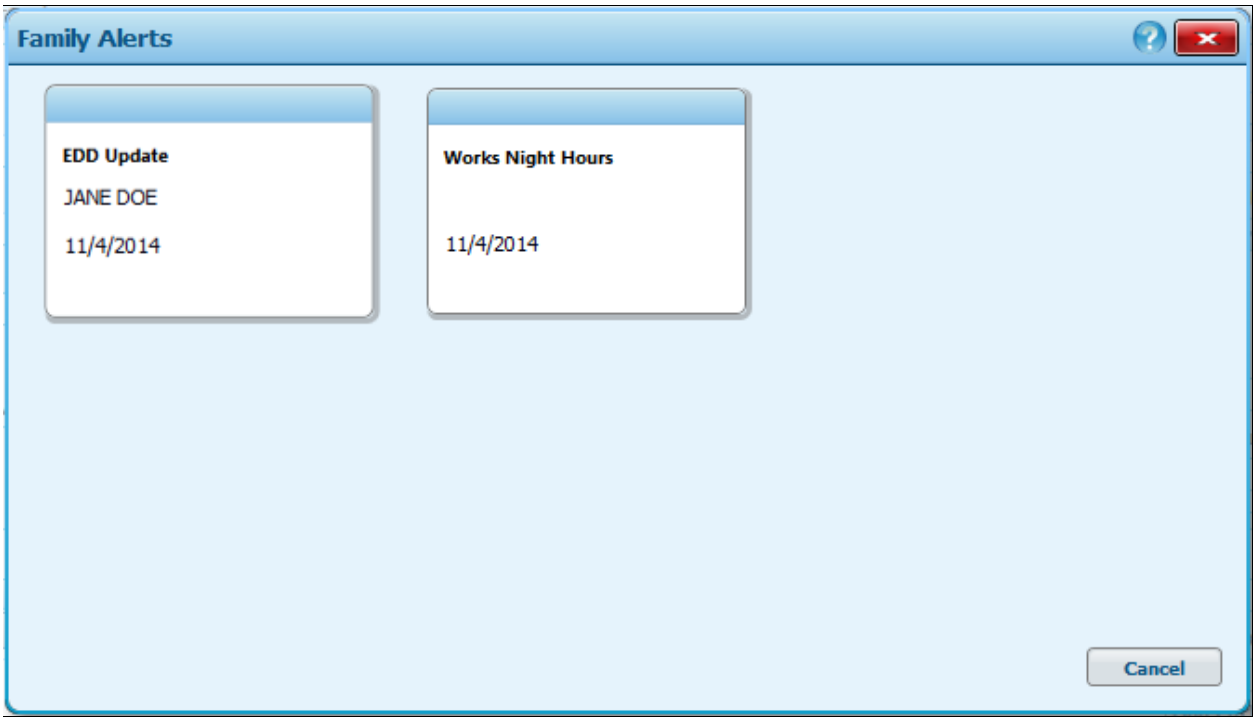


Pre-defined text displays under Alert Text once a state defined alert is selected. You may add additional text as needed.

6. Click **Save**. A status message displays indicating success. The **Family Alerts** screen displays and the alert is added to the **Alerts List** grid.



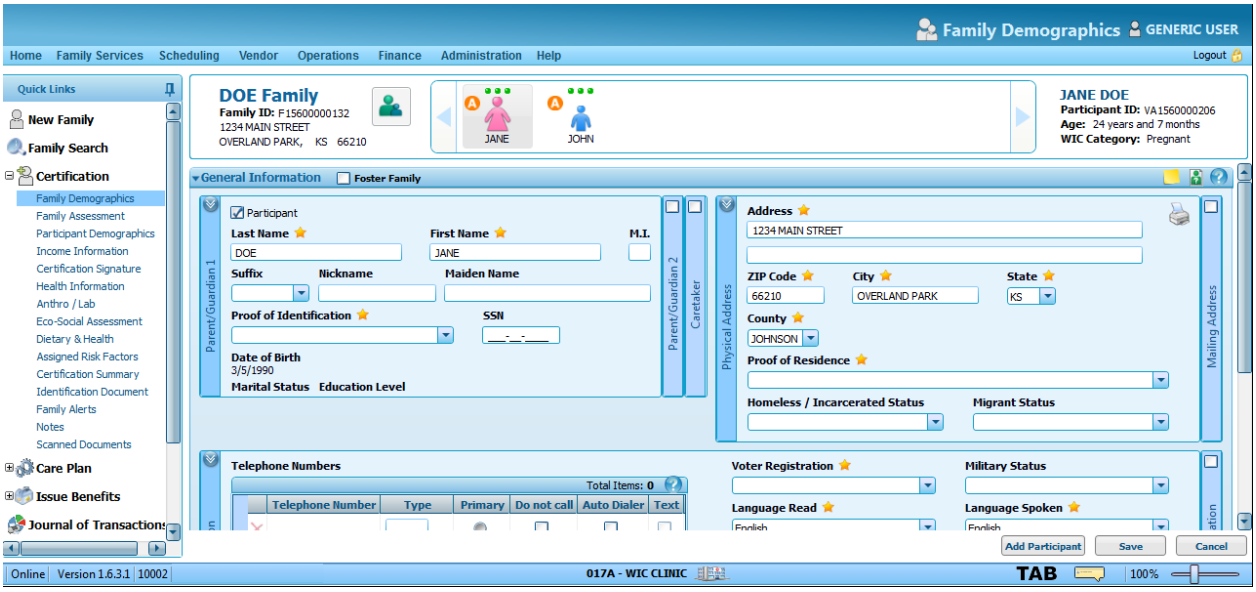
The Alert displays each time the family record is opened until the alert is deactivated.



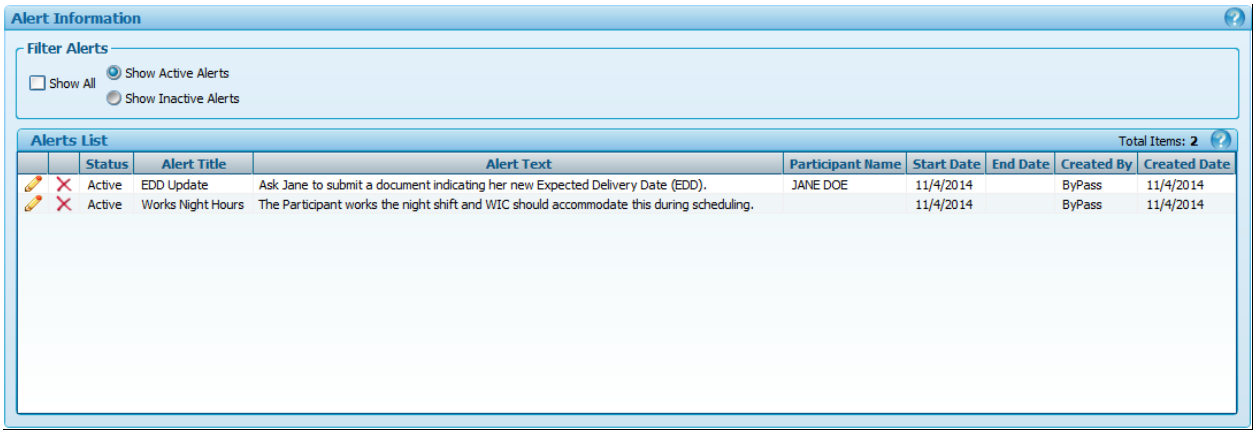
Task B. Inactivating Alerts

Complete the following steps to perform this task:

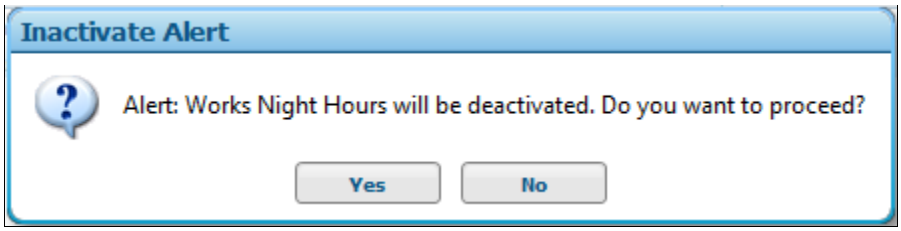
1. Access (or open) the desired family record. The Family Demographics screen displays.



2. Go to **Quick Links → Certification → Family Alerts**. The **Family Alerts** screen displays.



3. Within the **Alerts List** grid, click the red "X" button next to the alert you wish to inactivate. The **Inactivate Alert** screen displays.

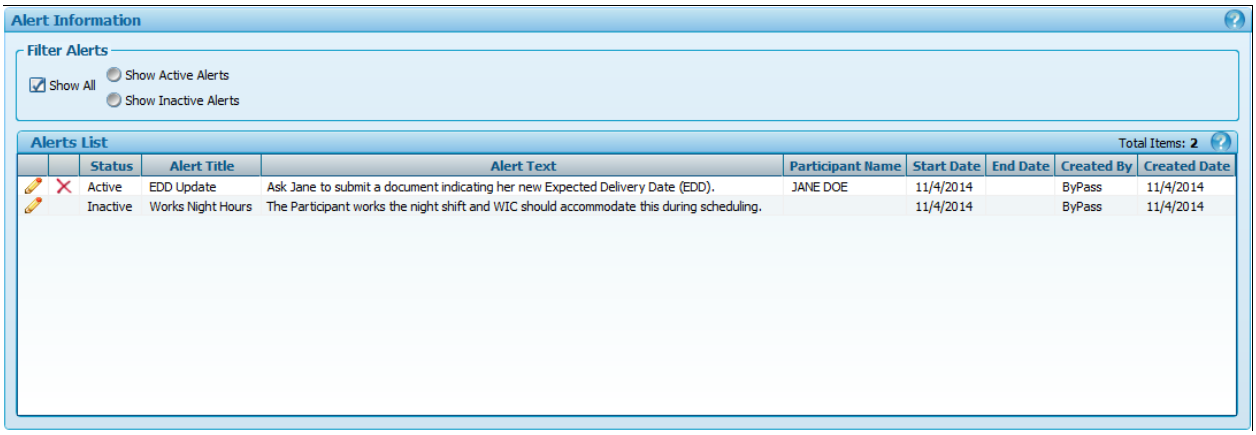


Another way to inactivate the alert is to edit the alert, change the status to inactive, and then click Save.

4. Click **Yes** to deactivate the alert. A status message displays indicating success. The **Family Alerts** screen displays and the selected alert is inactivated.

If Show Active Alerts is selected, the newly inactivated alert will not display within the grid. If Show Inactive Alerts is selected, the newly inactivated alert displays and its status is set to Inactive.

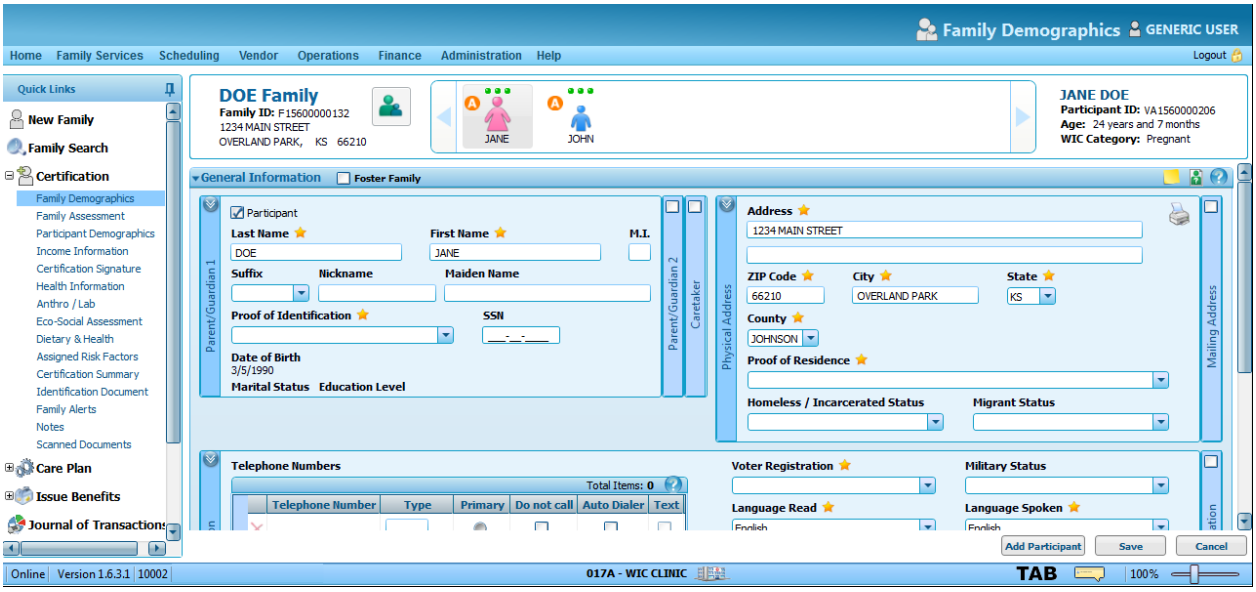
Click Show All to view both active and inactive alerts.



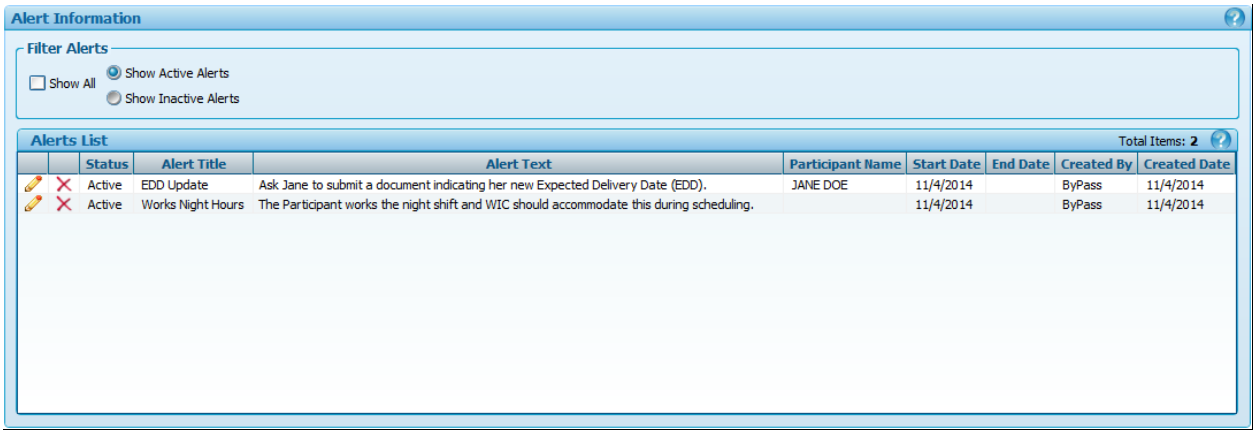
Task C. Editing an Alert

Complete the following steps to perform this task:

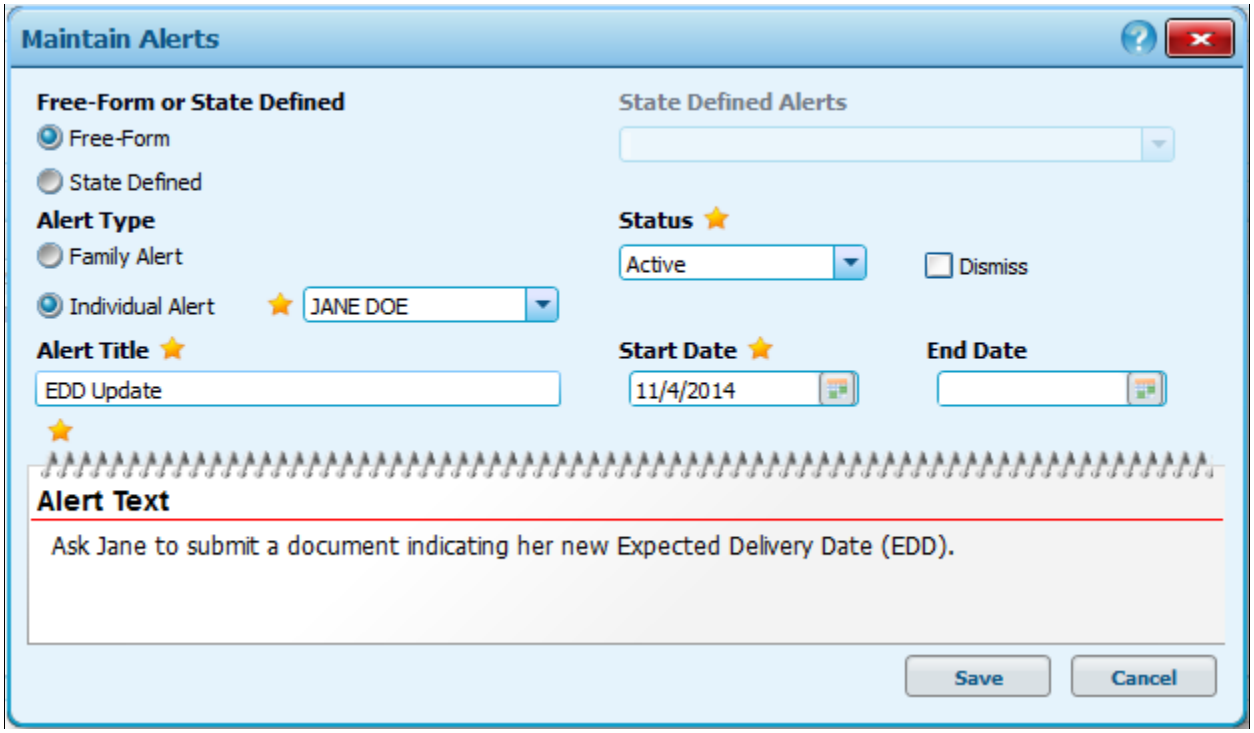
1. Access (or open) the desired family record. The Family Demographics screen displays.



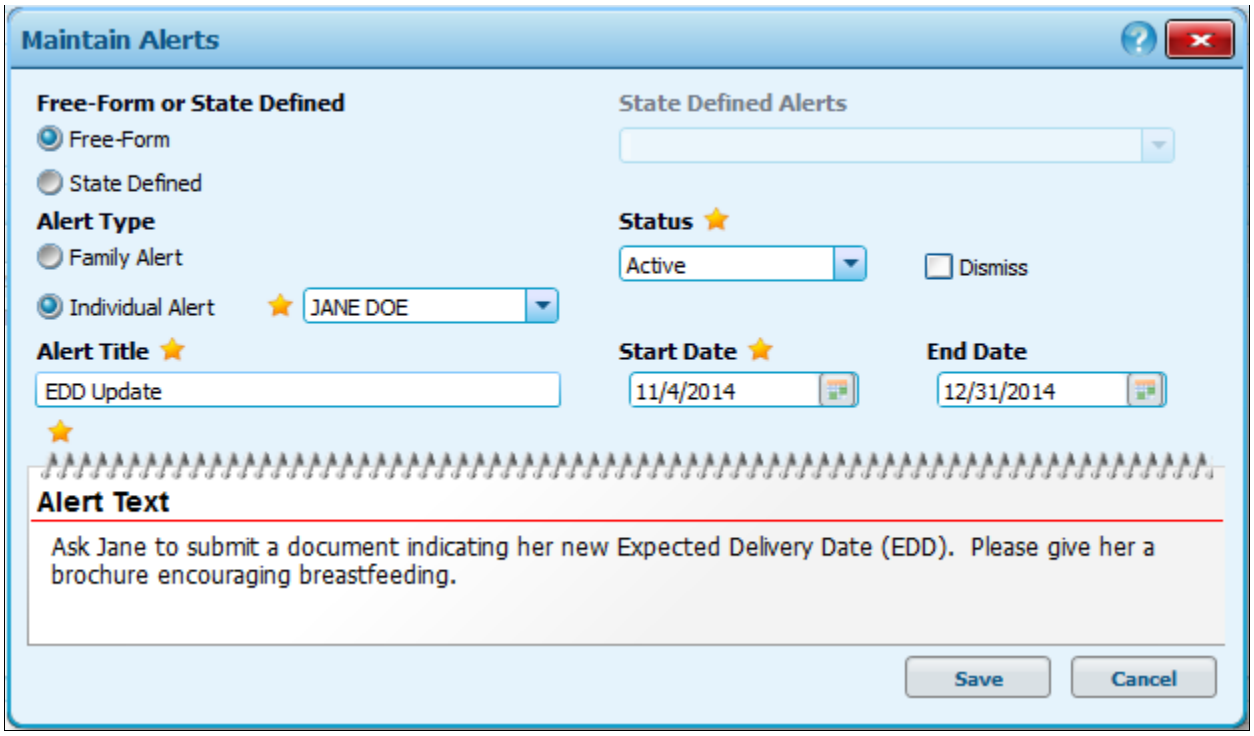
2. Go to **Quick Links → Certification → Family Alerts**. The **Family Alerts** screen displays.



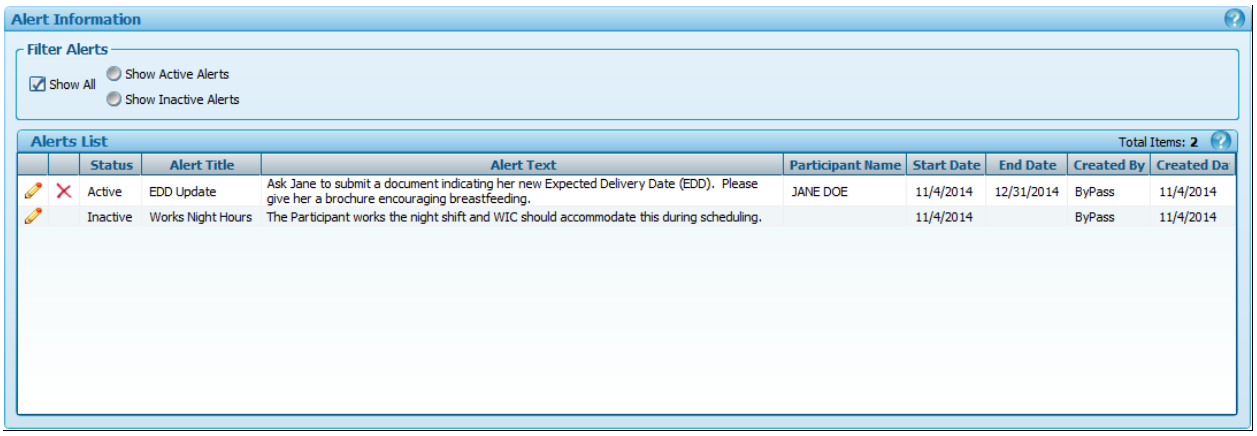
3. Within the **Alerts List** grid, click the red Edit button next to the alert you wish to edit. The **Maintain Alerts** screen displays.



4. Edit one or more of the following items:
   - **Free-form** or **State Defined**
   - **Alert Type** (and/or the individual)
   - **Status**
   - **Alert Title**
   - **Start Date**
   - **End Date**
   - **Alert Text**



5. Once the necessary edits have been made, click **Save**. The **Family Alerts** screen displays and the **Alerts List** grid is updated accordingly.



Congratulations!

You have successfully completed the **Family Alerts** process.

Immunization Status

The **Immunization Status Check/Update** screen displays the immunization status for the selected participant and allows the information to be updated. In addition, where permitted and if applicable, immunizations status can be retrieved from a real time interface with the state immunization registry, if applicable.

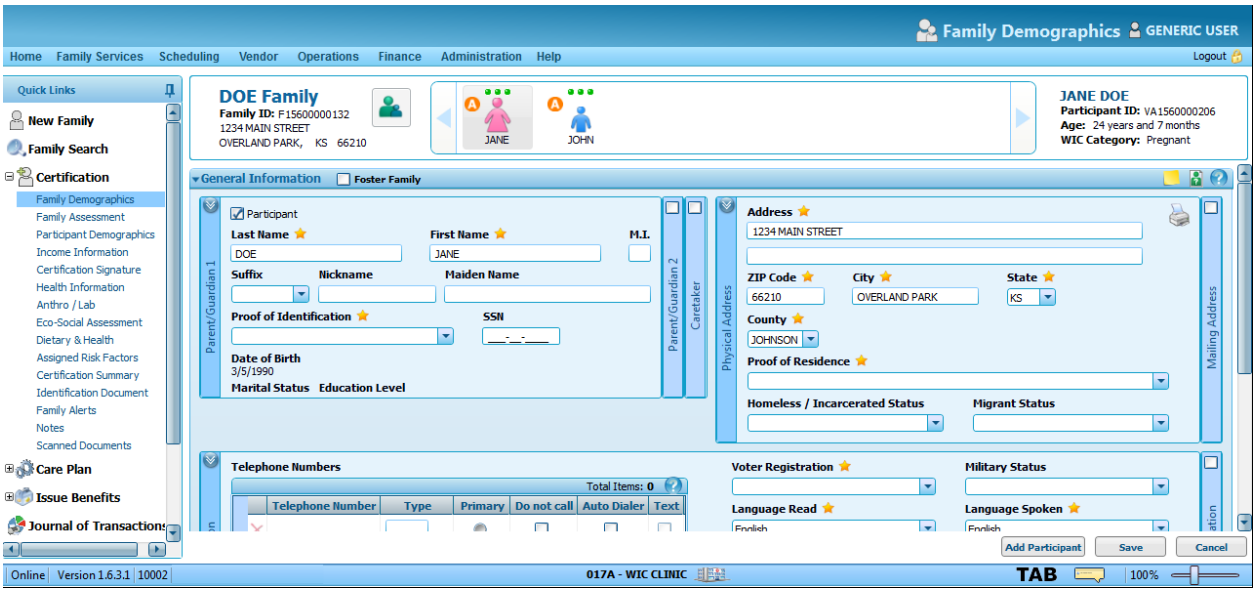
This process includes the following task(s):

Task A. Documenting Immunization Status 5-121

Task A. Documenting Immunization Status

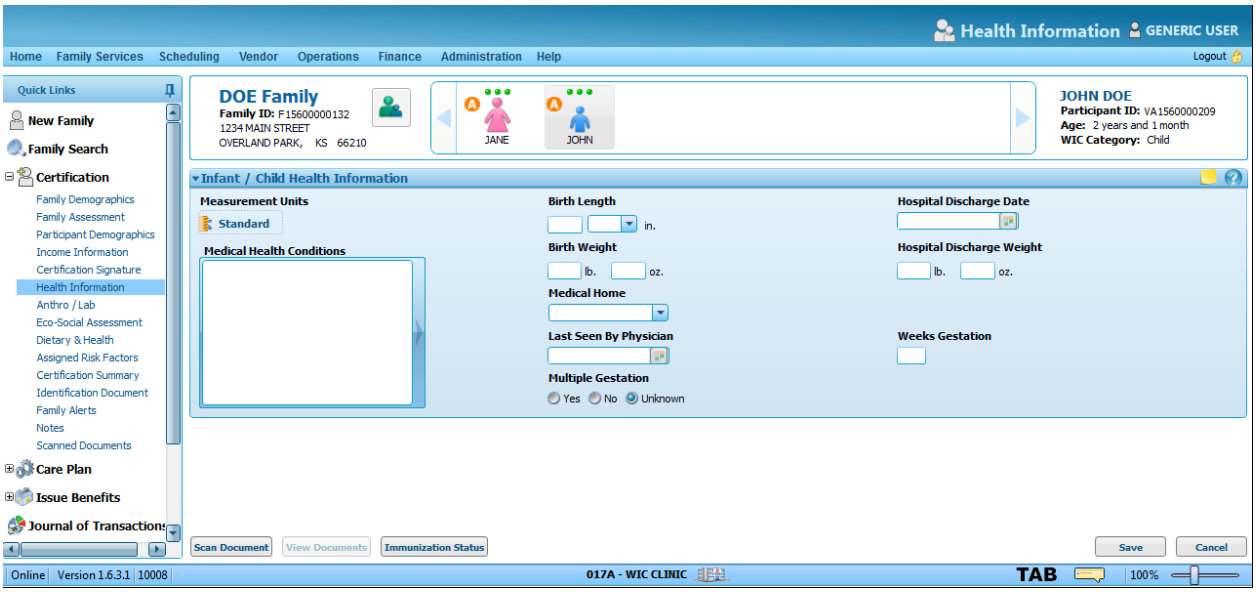
Complete the following steps to perform this task:

1. Access (or open) the desired family record. The Family Demographics screen displays.

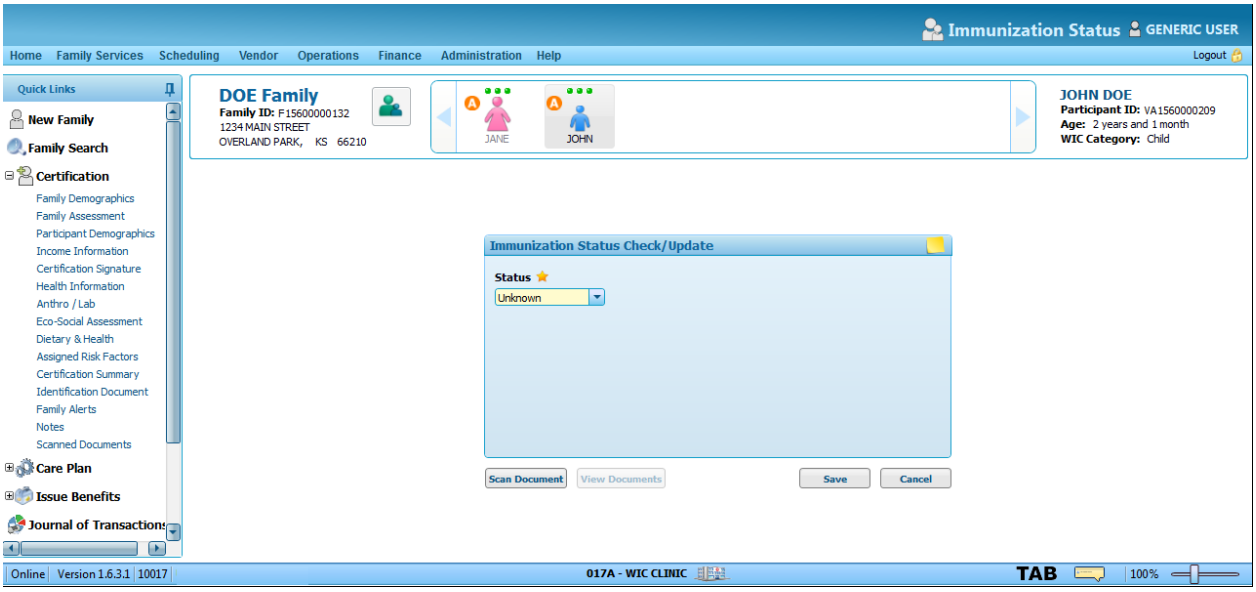


2. Select the desired family member icon within the Family Header.

3. Go to **Family Services → Certification → Health Information**. The **Health Information** screen displays.

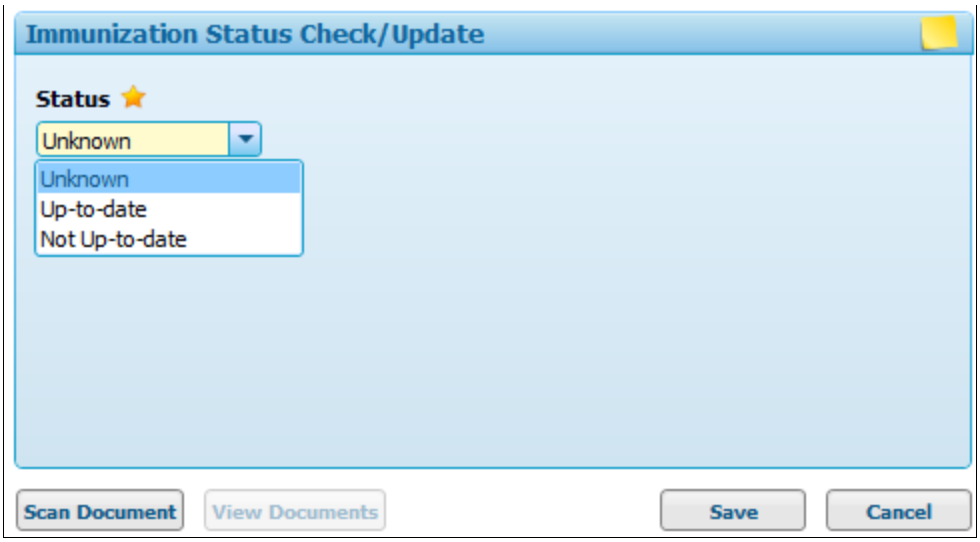


4. Click **Immunization Status.** The **Immunization Status** screen displays.



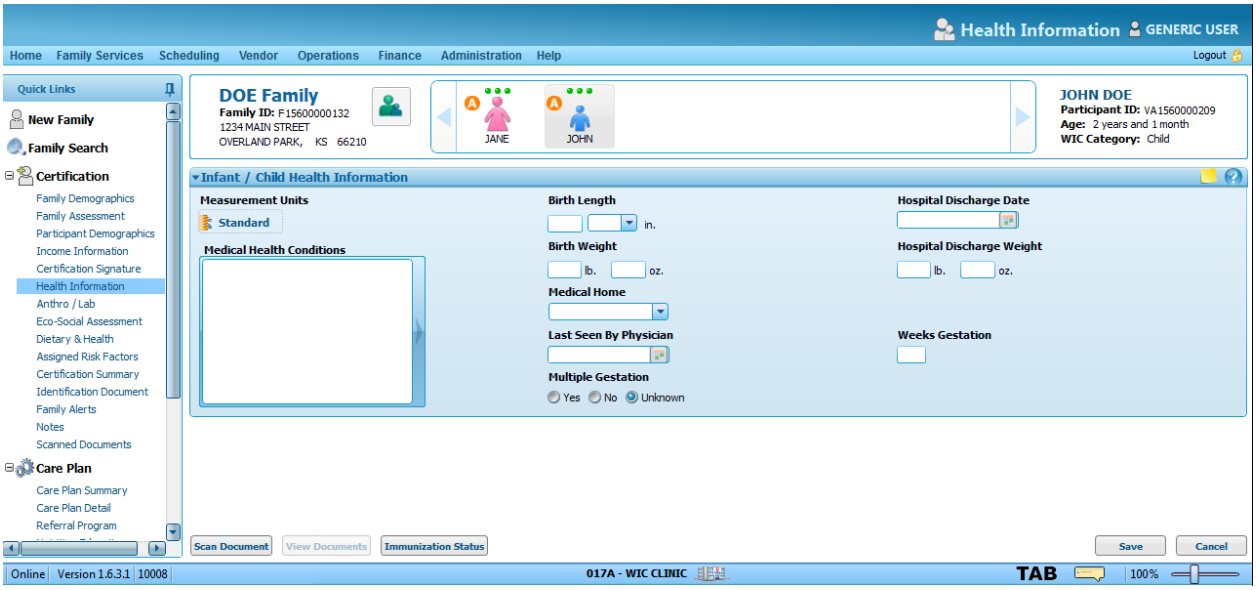
The Immunization Status screen can also be accessed through Quick Links, Health Information, Care Plan Summary screen or the Care Plan Detail screen.

5. Select the member's immunization status using the **Status** drop down list.

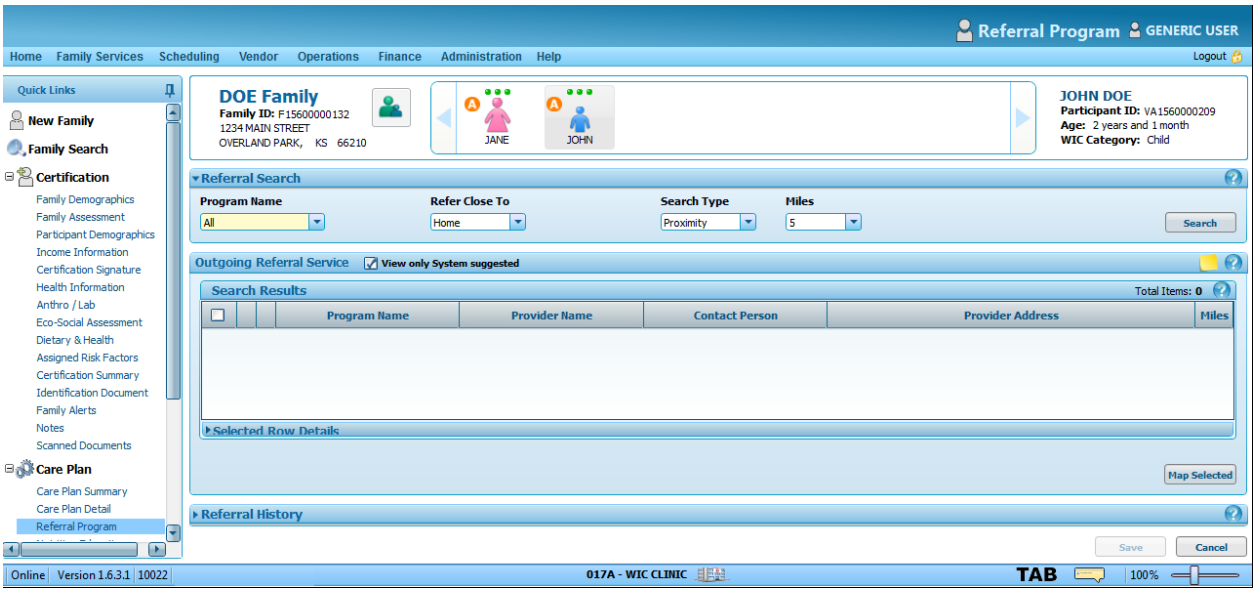


6. Click **Save**. The status message displays success and one of two things happens:

- If the user indicates the immunization status is up-to-date, then the user is returned to the previously displayed screen (such as the Health Information screen).



- If the user indicates the immunization status is not up-to-date, then the user is navigated to the Referrals Program screen, so that a referral can be made.



Congratulations!

You have successfully completed the **Immunization Status** process.

Document Assessment

The **Document Assessment** screen displays a list of individuals missing documentation or having documentation due and/or overdue. The date that the documentation or nutrition assessment is due is calculated, the type of documentation missing or due by date due displays. The screen allows WIC staff to prevent food benefit issuance if items are overdue.

The application calculates the date that documents, physical presence or the nutrition assessment is due. WIC staff may choose to prevent benefit issuance if items are overdue. The following types of documentation missing or due displays by date due.

- Identity/Residential Eligibility Documents due/overdue + 30 days for temporary certification (Certification becomes ineligible after the 30 days if required eligibility documentation is missing or overdue, if applicable).
- Nutritional risk evaluation is not completed within 60 a day timeframe.
- Pregnant Woman Presumptively Certified Risk 503 = 60 days (When the state defined option is enabled, a certification becomes ineligible after 60 days if a qualifying risk factor, not 503 hasn't been assigned).
- Lab work is due or overdue within the specified number of days per program category and age.

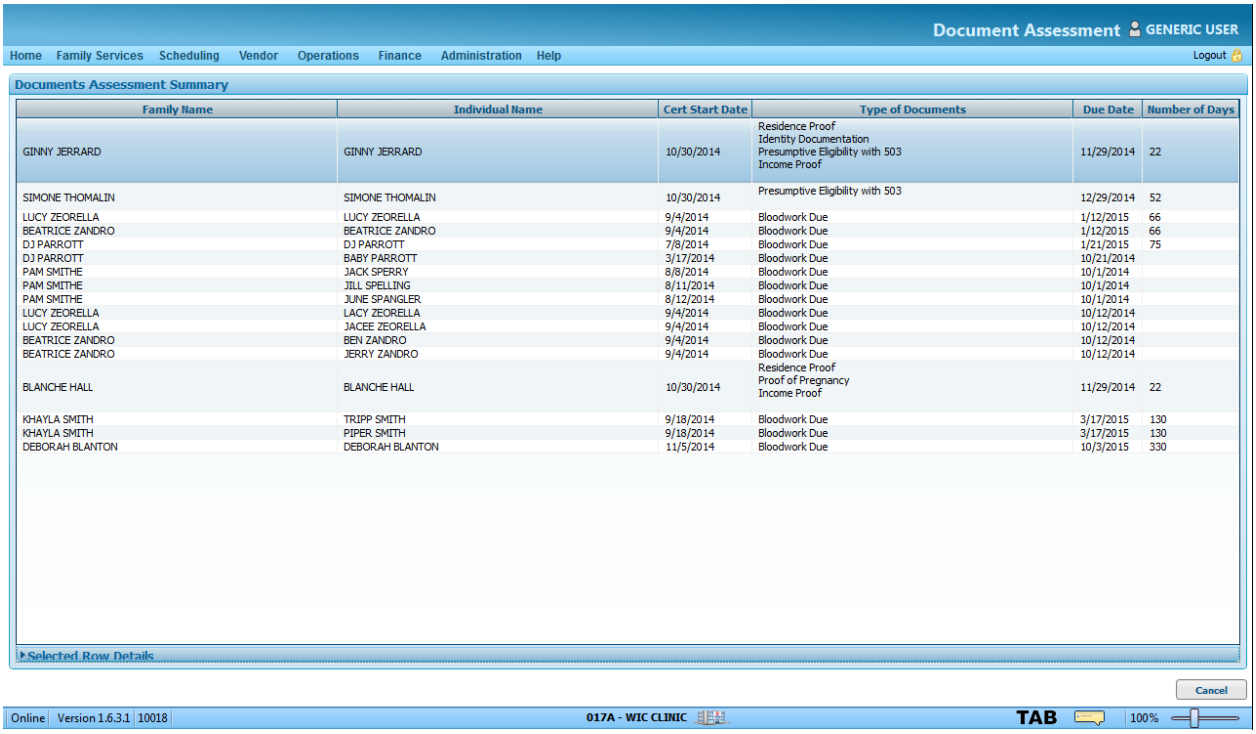
This process includes the following task(s):

Task A. View Document Assessment 5-125

Task A. View Document Assessment

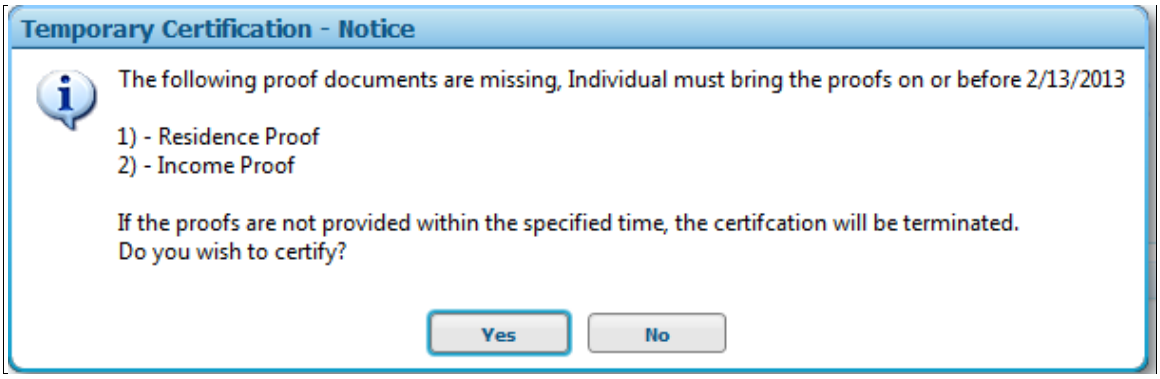
Complete the following steps to perform this task:

1. Go to **Family Services → Certification → Document Assessment**. The **Document Assessment** screen displays.



Family Name	Individual Name	Cert Start Date	Type of Documents	Due Date	Number of Days
GINNY JERRARD	GINNY JERRARD	10/30/2014	Residence Proof Identity Documentation Presumptive Eligibility with 503 Income Proof	11/29/2014	22
SIMONE THOMALIN	SIMONE THOMALIN	10/30/2014	Presumptive Eligibility with 503	12/29/2014	52
LUCY ZEORELLA	LUCY ZEORELLA	9/4/2014	Bloodwork Due	1/12/2015	66
BEATRICE ZANDRO	BEATRICE ZANDRO	9/4/2014	Bloodwork Due	1/12/2015	66
DJ PARROTT	DJ PARROTT	7/8/2014	Bloodwork Due	1/21/2015	75
DJ PARROTT	BABY PARROTT	3/17/2014	Bloodwork Due	10/21/2014	
PAM SMITHE	JACK SPERRY	8/8/2014	Bloodwork Due	10/1/2014	
PAM SMITHE	JILL SPELLING	8/11/2014	Bloodwork Due	10/1/2014	
PAM SMITHE	JUNE SPANGLER	8/12/2014	Bloodwork Due	10/1/2014	
LUCY ZEORELLA	LACY ZEORELLA	9/4/2014	Bloodwork Due	10/12/2014	
LUCY ZEORELLA	JACEE ZEORELLA	9/4/2014	Bloodwork Due	10/12/2014	
BEATRICE ZANDRO	BEN ZANDRO	9/4/2014	Bloodwork Due	10/12/2014	
BEATRICE ZANDRO	JERRY ZANDRO	9/4/2014	Bloodwork Due	10/12/2014	
BLANCHE HALL	BLANCHE HALL	10/30/2014	Residence Proof Proof of Pregnancy Income Proof	11/29/2014	22
KHAYLA SMITH	TRIPP SMITH	9/18/2014	Bloodwork Due	3/17/2015	130
KHAYLA SMITH	PIPER SMITH	9/18/2014	Bloodwork Due	3/17/2015	130
DEBORAH BLANTON	DEBORAH BLANTON	11/5/2014	Bloodwork Due	10/3/2015	330

The Document Assessment grid displays the type of document, due date and number of days due. This information was captured during the Certification process. At the end of a Certification attempt, it is necessary to click the Certify button to complete the Certification process. If elements of the Certification attempt are missing, the Temporary Certification – Notice screen displays. This screen lists the missing documents. Responding Yes to “Do you wish to certify?” enables certification of the participant and the proofs required then displays within the Documents Assessment Summary grid.



Congratulations!

You have successfully completed the **Document Assessment** process.

Notes

The system provides **Notes** in a memo pad format to document additional participant information beyond what is covered on any of the forms. The notes can be found on each content container on the right side of the title bar. The system will include the use of free form text boxes for staff to enter notes and other comments related to specific participant/family or vendor records and/or specific functional areas of records. Such notes will be maintained by date and type and can be sorted for display in different order by the user. The system will maintain an audit trail for all system transactions, including the user, the change, and the time and date.

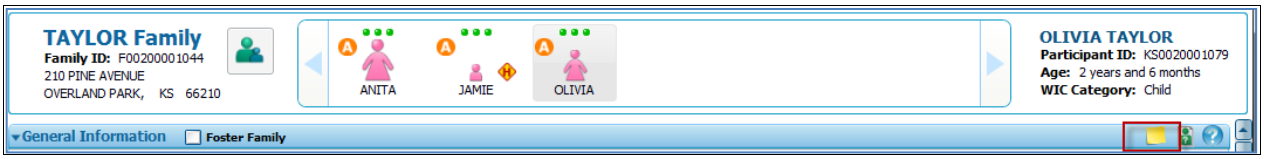
This process includes the following task(s):

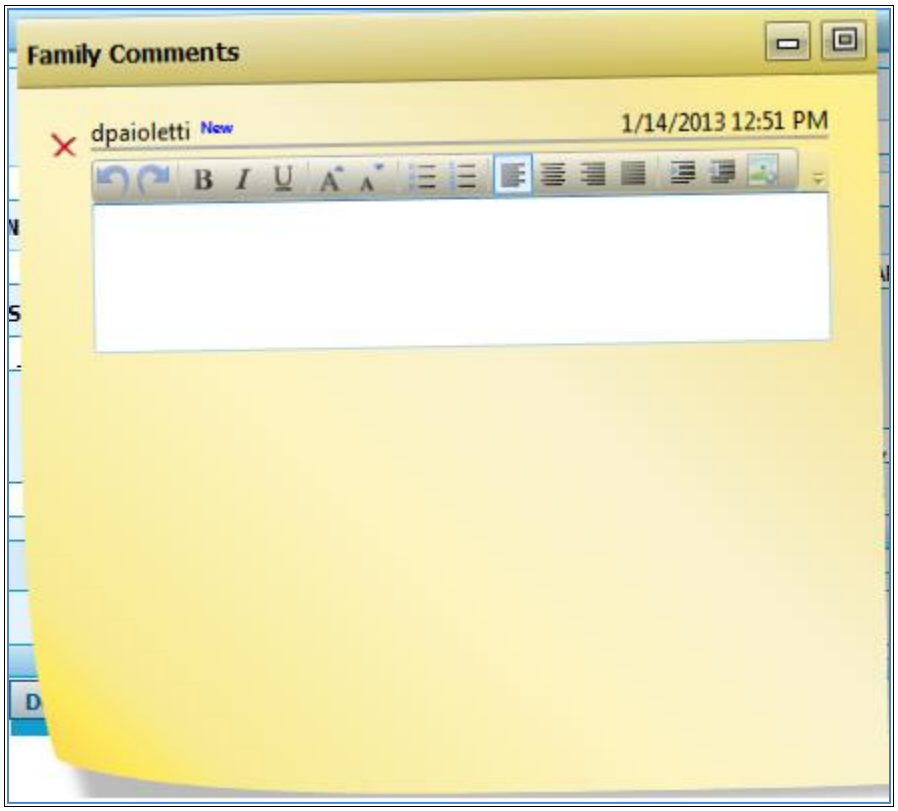
Task A. Adding Notes **5-128**
Task B. Canceling Notes **5-130**

Task A. Adding Notes

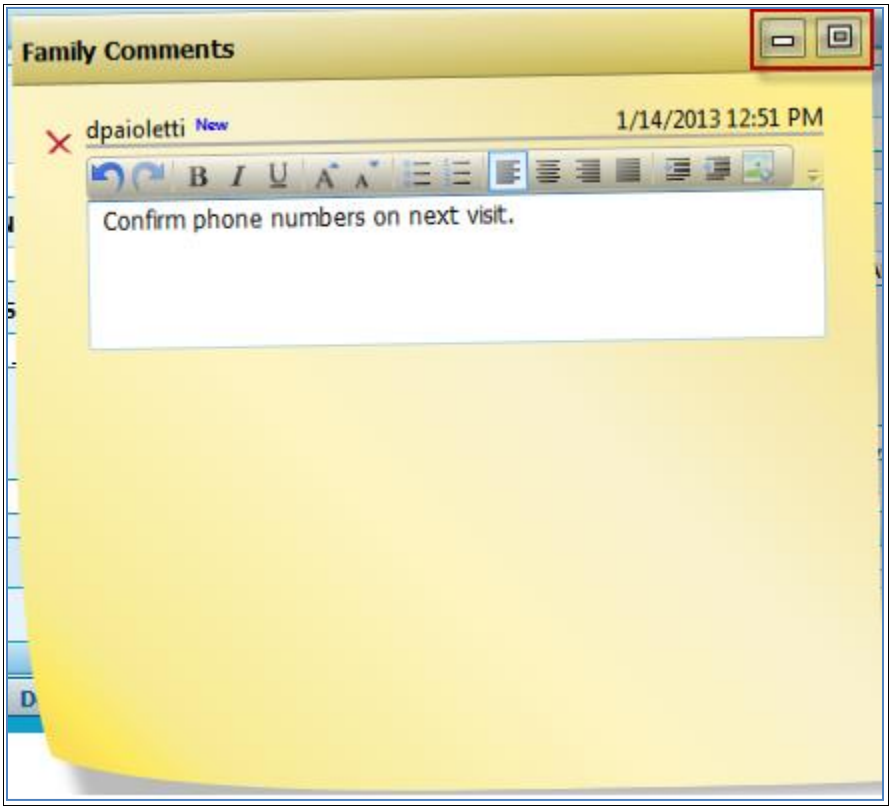
Complete the following steps to perform this task:

1. Click on the **Comment Launch** button ( ). The **Sticky Note** screen displays.





2. Enter comments in the text box in reference to the current screen.



3. Click the **Maximize** button ( ) to expand the note screen.
4. Click the **Minimize** button ( ) to save and minimize the contents window. The icon changes to the **Comment View** button ( ) indicating the comment was saved.

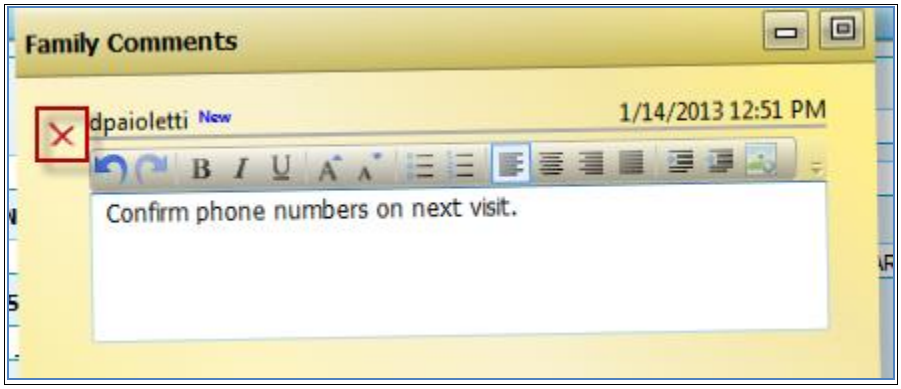
Comments on the Family Demographic screen are Family Notes. Comments on the Participant Demographics screen as well as other participant screens pertain only to the participant.

5. To view the comment, click on the **Comment View** button ( ).

Task B. Canceling Notes

Complete the following steps to perform this task:

1. Click the **Comment Launch** button ( ).



2. Click the **Delete** button ( ) next to the text. The note is removed from the screen.
3. Click the **Minimize** button ( ) to save and minimize the contents window. The icon returns to a blank status.

Congratulations!

You have successfully completed the **Notes** process.

Scanned Documents

The **Scanned Documents** screen lists all documents scanned throughout the certification process.

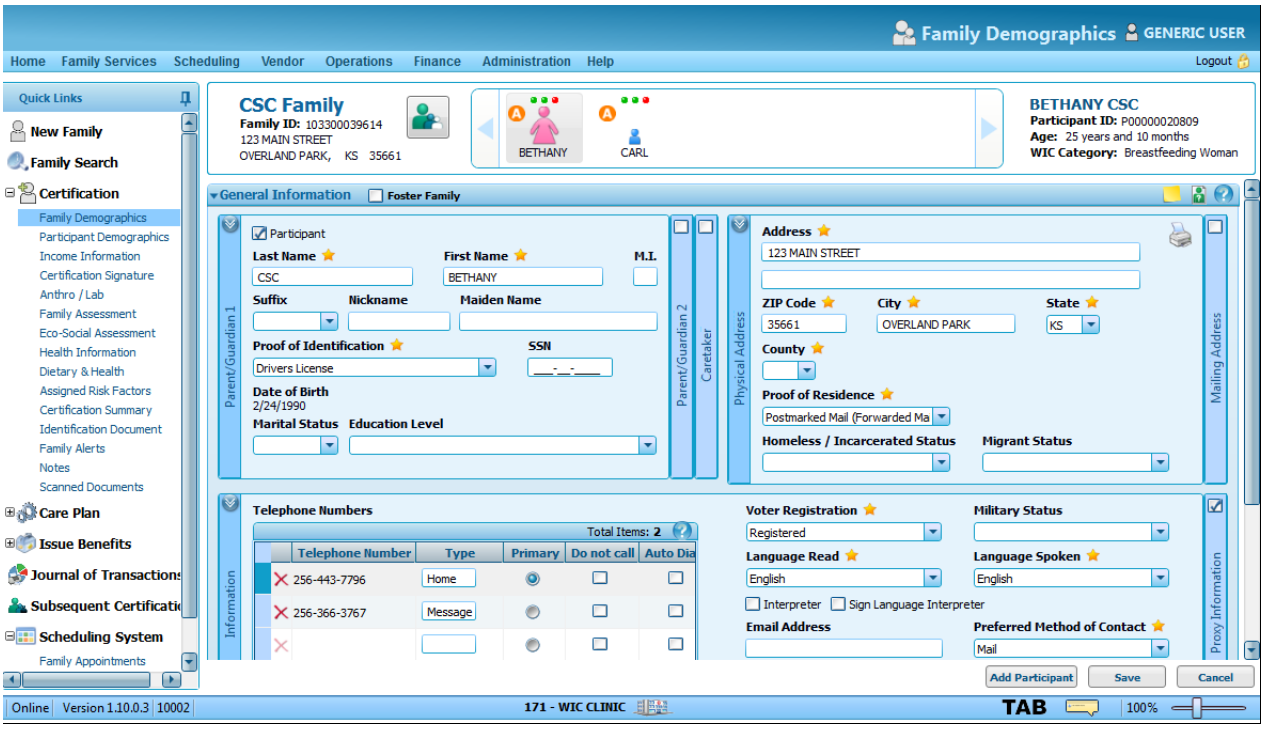
This process includes the following task(s):

Task A. Viewing Scanned Documents **5-132**

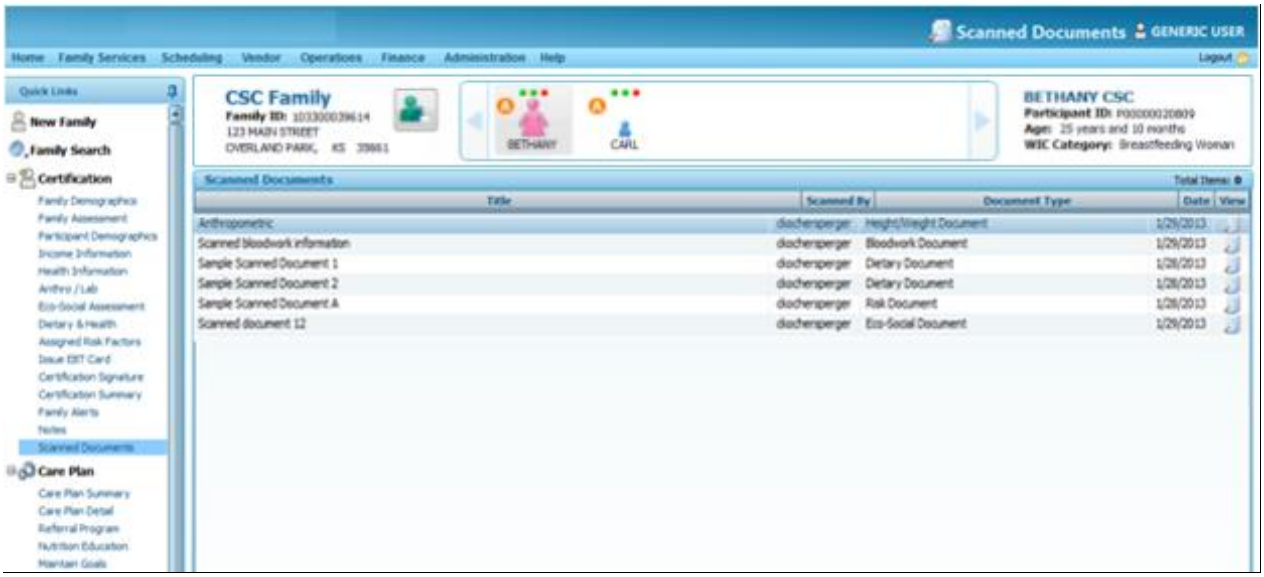
Task A. Viewing Scanned Documents

Complete the following steps to perform this task:

1. Access or open a family record. The **Family Demographics** screen displays.

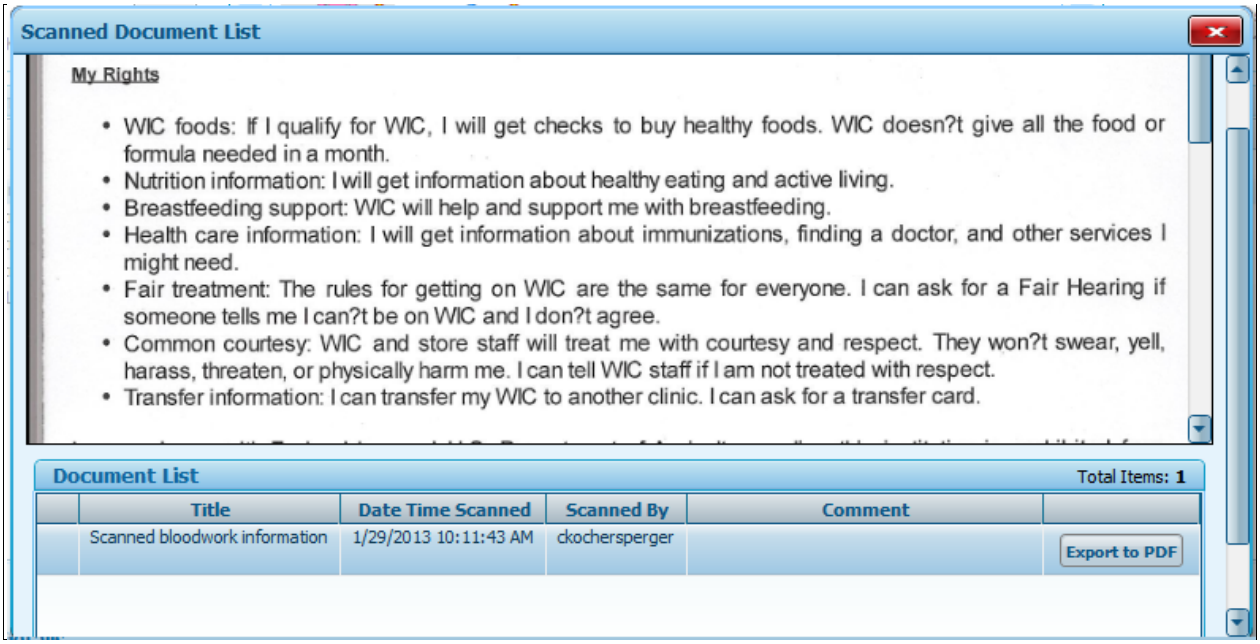


2. Go to **Family Services → Certification → Scanned Documents**. The **Scanned Documents** screen displays.



3. Select a row in the grid and click **Selected Row Details** to view detailed information about the selected record.

4. Click the **View** button ( ) to display a scanned document.



5. Click **Cancel** to close the scanned document.

Congratulations!

You have successfully completed the **Scanned Documents** process.

Working with Other Types of Certification

This scenario explains three different processes; temporary certifications, presumptively eligible certifications, and pending applications. An explanation of each process is provided. Decide which process you wish to complete and follow the instructions below.

A temporary certification exists when the certification process is completed without certain documentation being provided -- such as ID and/or proof of residency. In these instances, documentation must be provided within 30 days or the system automatically terminates the certification.

A presumptively eligible certification exists when a woman with a WIC category of pregnant is certified using risk factor 503 (presumptive eligibility). In these instances, another risk factor must be documented in the member's record within 60 days or the record is marked Ineligible. Assume you have searched for a family record that includes a presumptively eligible pregnant woman and are preparing to access (or open) the family record.

A pending application exists when the certification process is started, but never finished due to missing documentation like proof of residency, ID, or income. In these instances, the applicant must supply the necessary documentation within a certain timeframe (10 or 20 days depending on WIC category and priority level of the applicant). Failure to document the missing information results in the record being marked as Ineligible by the system. Assume you have searched for a family record that includes a pending application and are preparing to access (or open) the family record.

This process includes the following task(s):

Task A. Documenting Missing Proof – Temporary Certifications **5-135**

Task B. Assigning Presumptive Eligibility to Certify Pregnant Women **5-138**

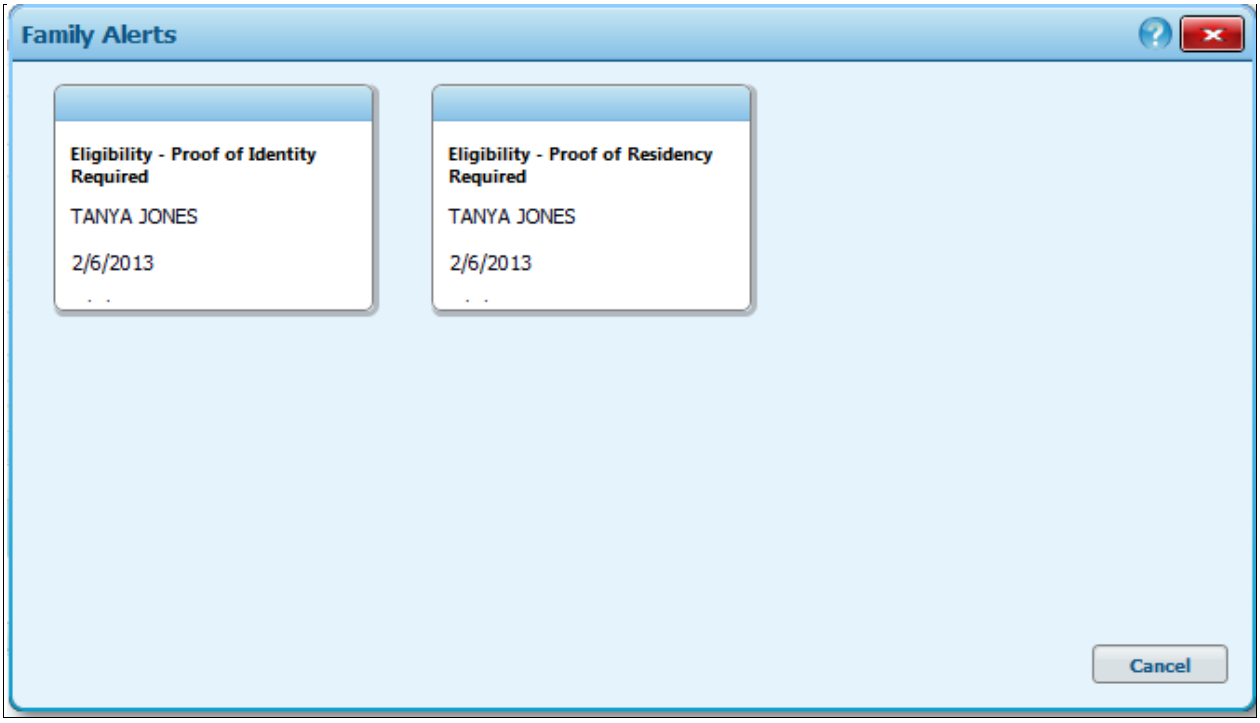
Task C. Assigning a Risk Factor to Remove Presumptive Eligibility **5-145**

Task D. Documenting Missing Proof – Pending Applications **5-149**

Task A. Documenting Missing Proof – Temporary Certifications

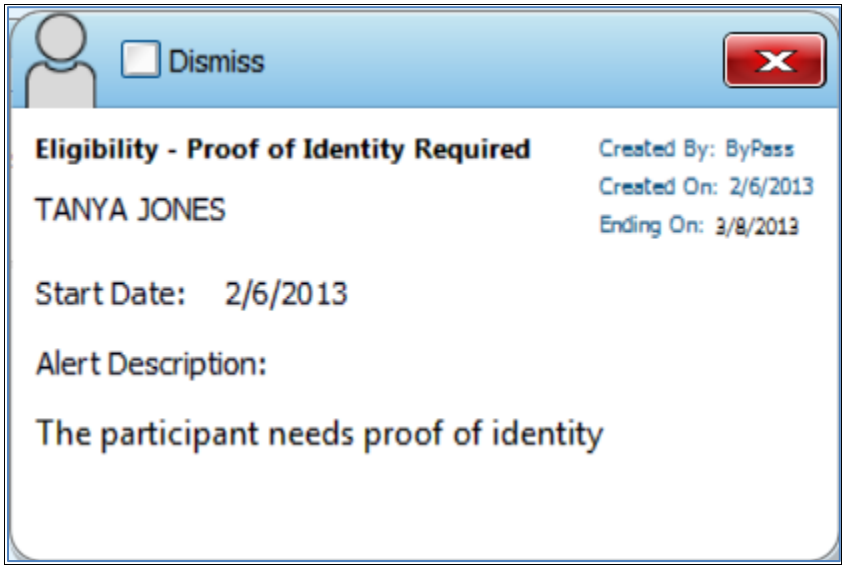
Complete the following steps to perform this task:

1. On the **Family Search** screen, under **Search Results**, click the **Edit** button ( ) to access (or open) the family record. The **Family Demographics** screen displays, along with the following **Family Alerts**:

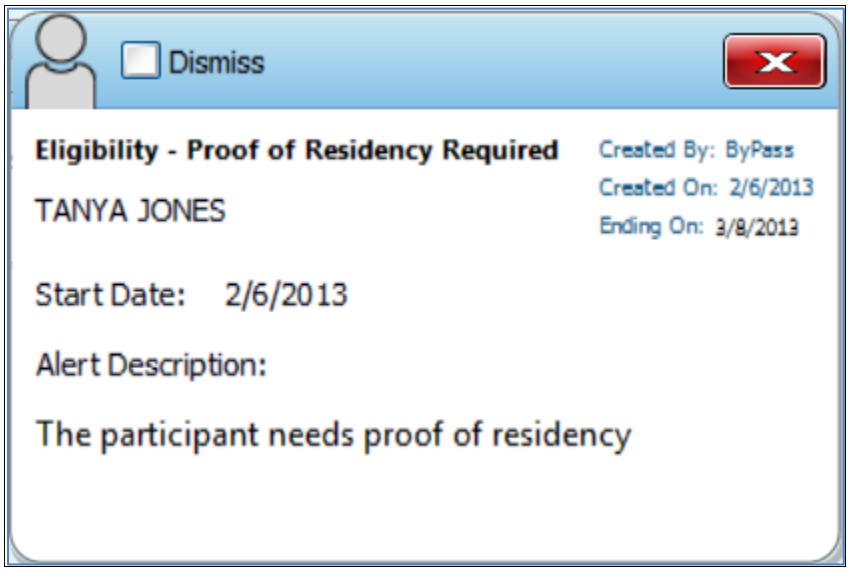


A family alert is added by the system automatically when no proof of identification or residency is documented during the Certification process.

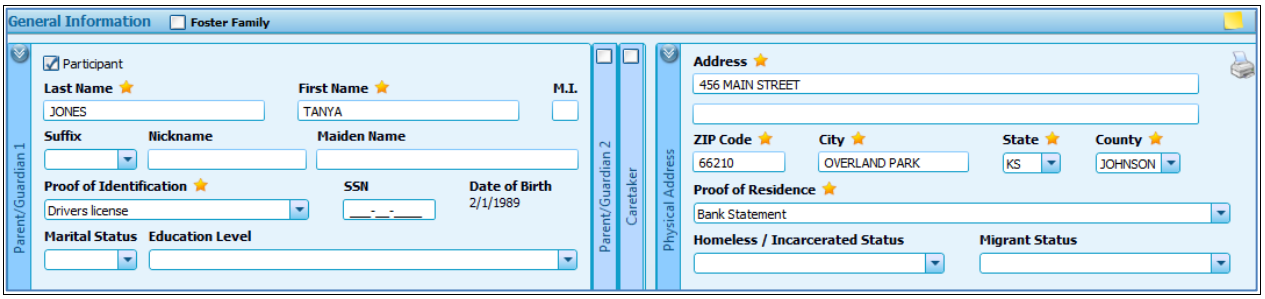
2. Click on the **Eligibility – Proof of Identity Required** alert to view additional information. Close the popup after reviewing the information.



3. Click on the **Eligibility – Proof of Residency Required** alert to view additional information. Close the popup after reviewing the information.



4. Click **Close** to dismiss the **Family Alerts** screen. You are returned to the **Family Demographics** screen.
5. Select a **Proof of Identification**.
6. Select a **Proof of Residence**.



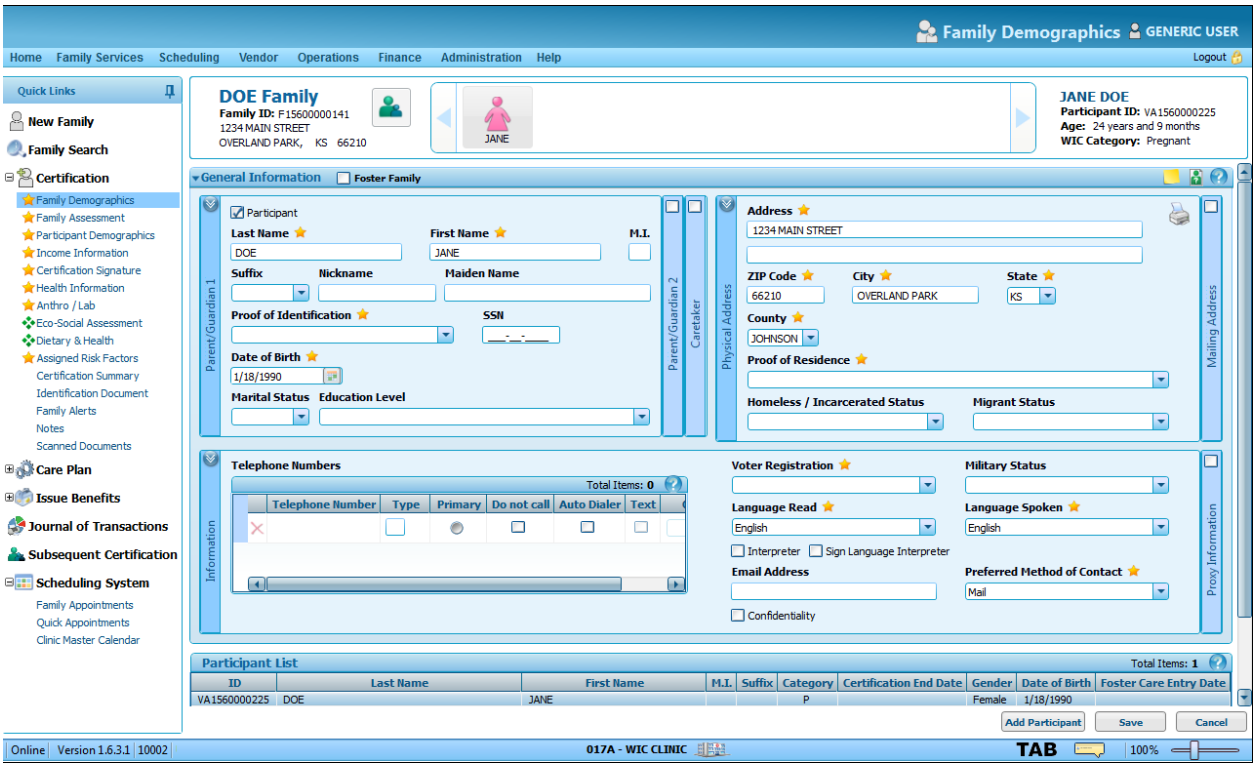
7. Click **Save**. A status message displays indicating success and you are navigated to the **Health Information** screen.

> The system automatically sets the status of the alert to Inactive once missing proof is documented.

Task B. Assigning Presumptive Eligibility to Certify Pregnant Women

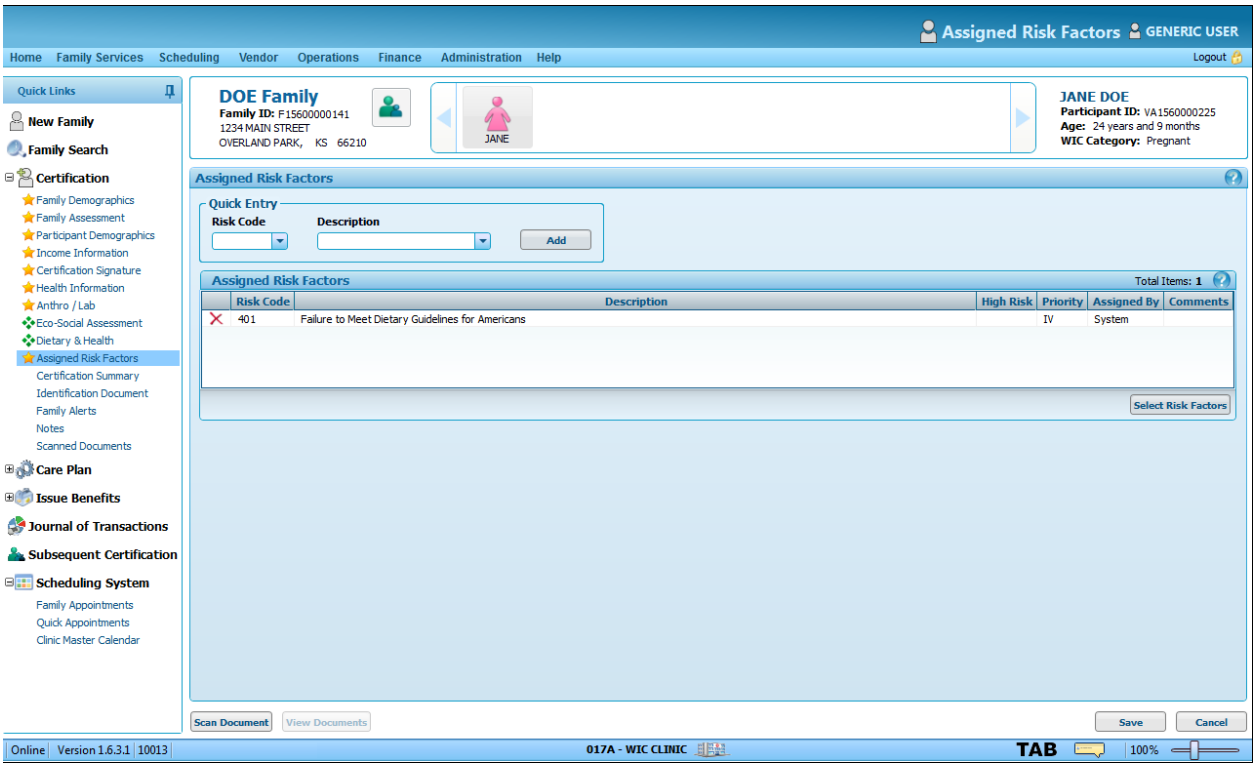
Complete the following steps to perform this task:

1. On the **Family Search** screen, under **Search Results**, click the **Edit** button ( ) to access (or open) the family record. You are navigated to the **Family Demographics** screen.



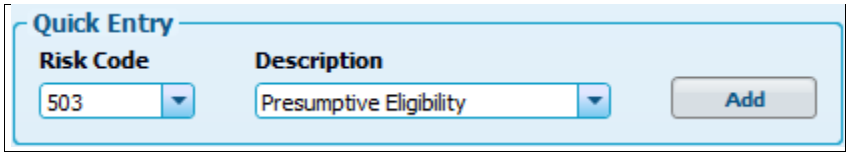
Assume the screens traditionally assigned to support staff would be completed prior to a Competent Professional Authority (CPA) assigning risk factors.

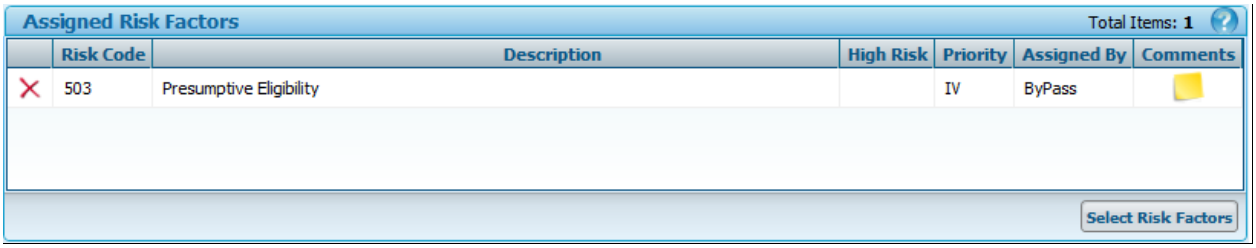
2. Go to **Quick Links → Certification → Assigned Risk Factors**. The **Assigned Risk Factors** screen displays.



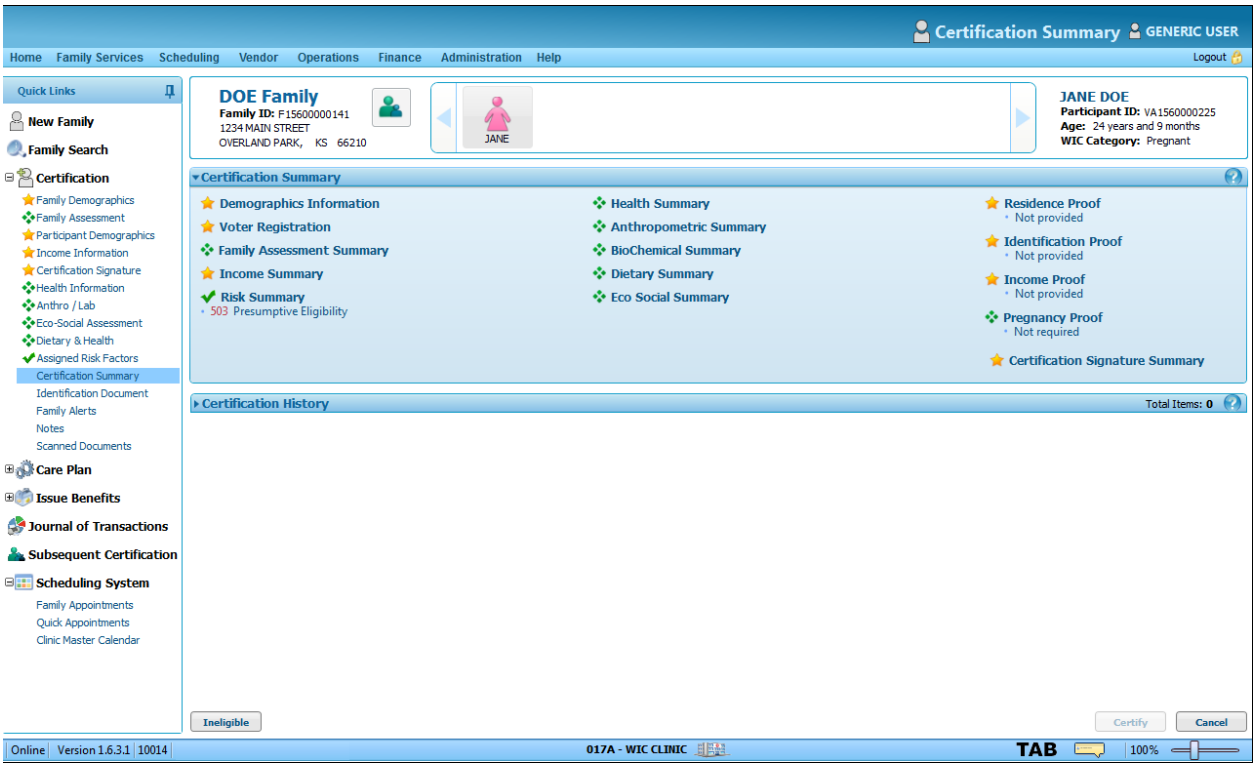
Upon initial display of the screen, risk factor 401 Failure to Meet Dietary Guidelines for Americans is displayed by default.

3. Use either the **Quick Entry** group box or the **Select Risk Factors** button to select and then assign the **503 - Presumptive Eligibility** risk factor. The **Assigned Risk Factors** grid is updated to display the newly assigned risk factor.





4. Click **Save**. The next screen in the process displays and the **Certification Quick Links** are updated based on the assignment of the presumptive eligibility risk factor.



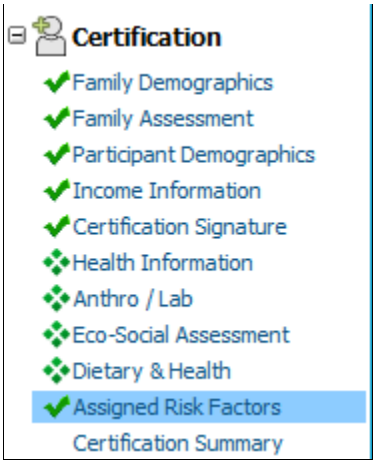
When presumptive eligibility is assigned, the following screens are changed from being required screens to optional screens:

Family Assessment

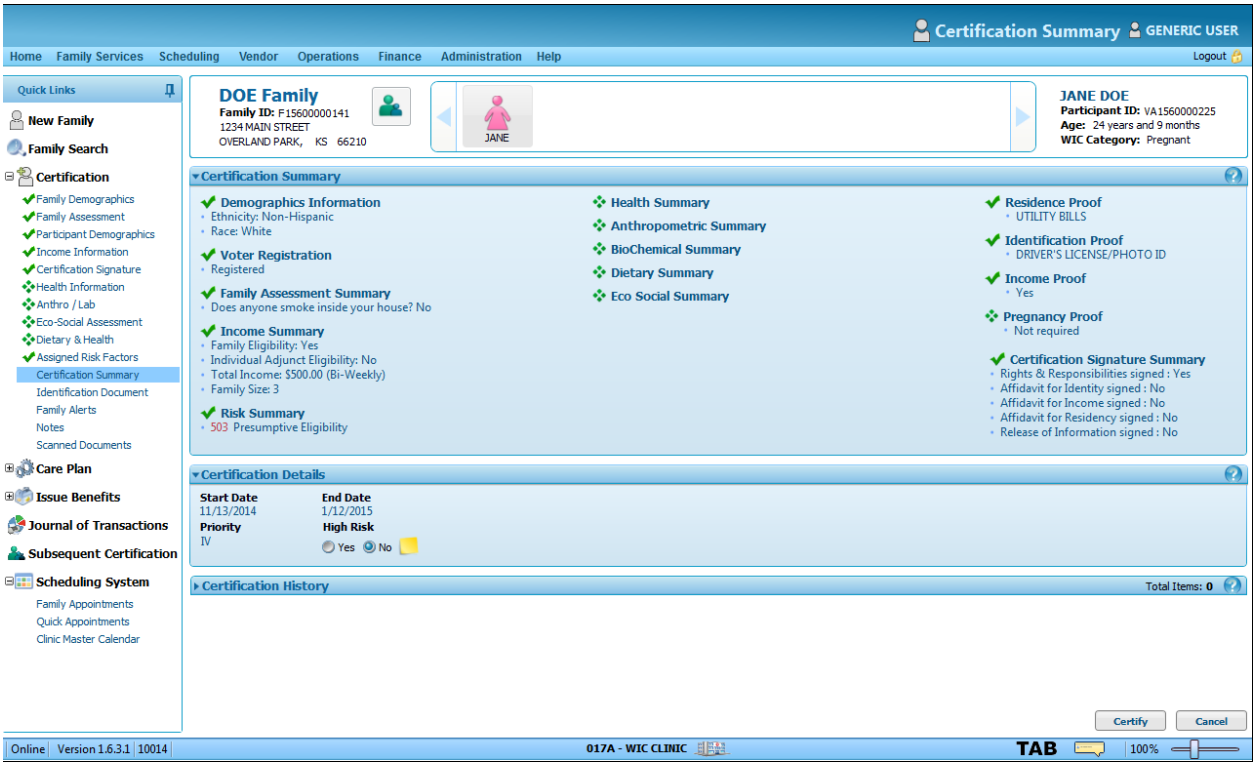
Health Information

Anthro/Lab

5. At a minimum, complete the remaining required Certification screens.

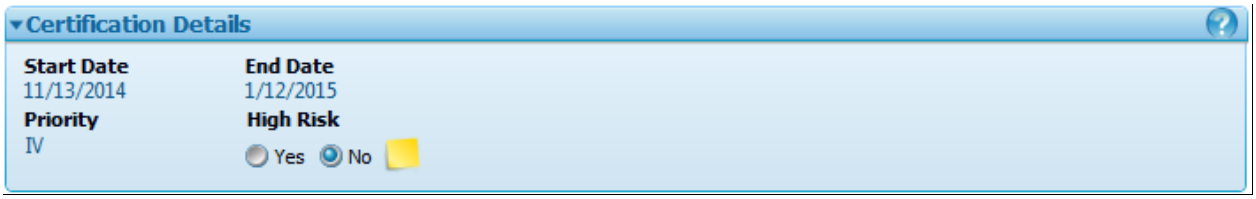


6. Go to **Quick Links → Certification → Certification Summary**. The **Certification Summary** screen displays.



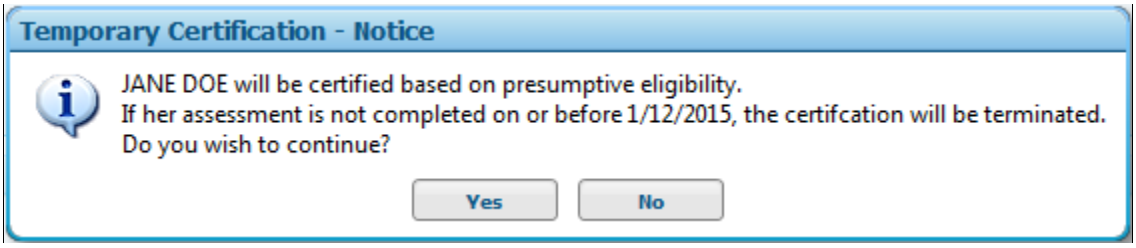
As previously mentioned, because the presumptive eligibility risk factor has been assigned, several screens typically required are no longer required. Additionally the Certify button is enabled and the Pregnant woman can be certified.

7. View the **Certification Details** container.

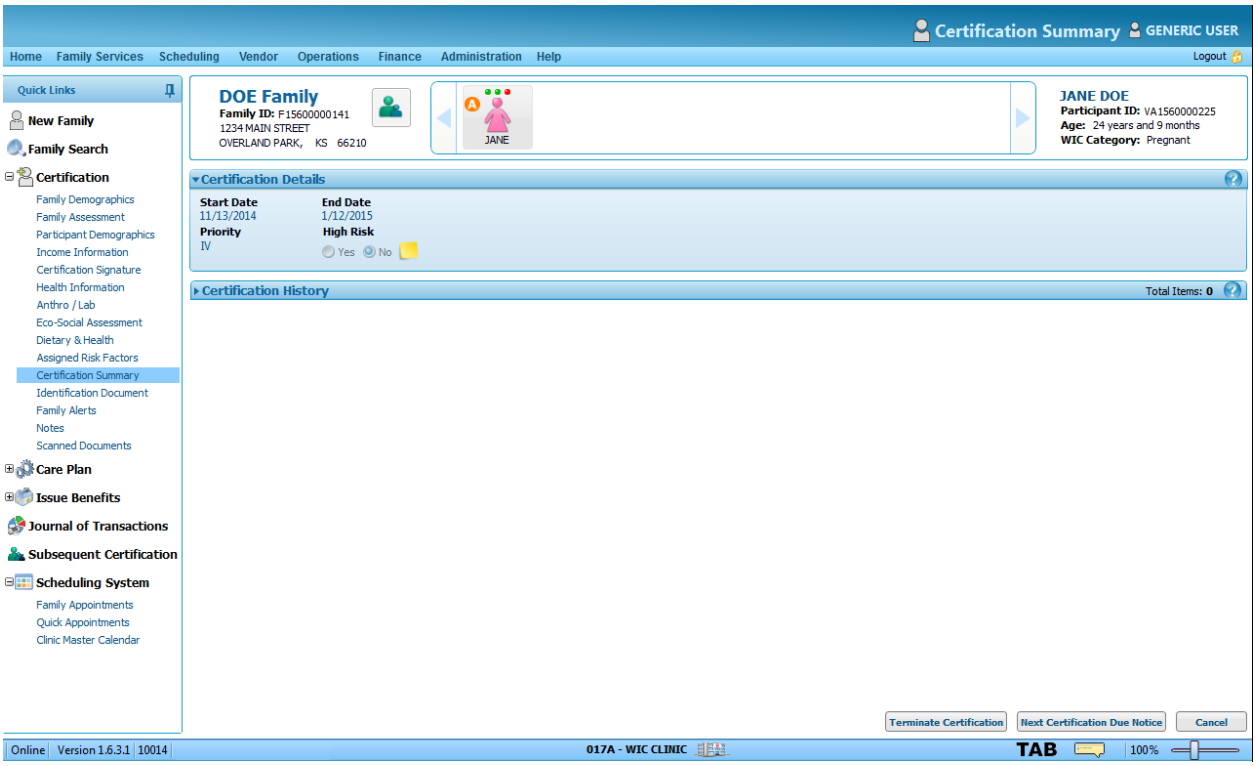


The Certification End Date established for Pregnant women upon completion of a Certification attempt is configurable by the state. Often times it is set to use her expected delivery date (EDD) plus six weeks (EDD + 6 weeks). The assignment of the presumptive eligibility risk factor, however, overrides the configurable setting and establishes a 60 day Certification period.

8. Click **Certify**. A confirmation message displays.



9. Click **Yes** to complete the Certification attempt using the presumptive eligibility risk factor. The **Certification Summary** screen is refreshed and the icon within the **Family Header** is updated to indicate an active Certification period.

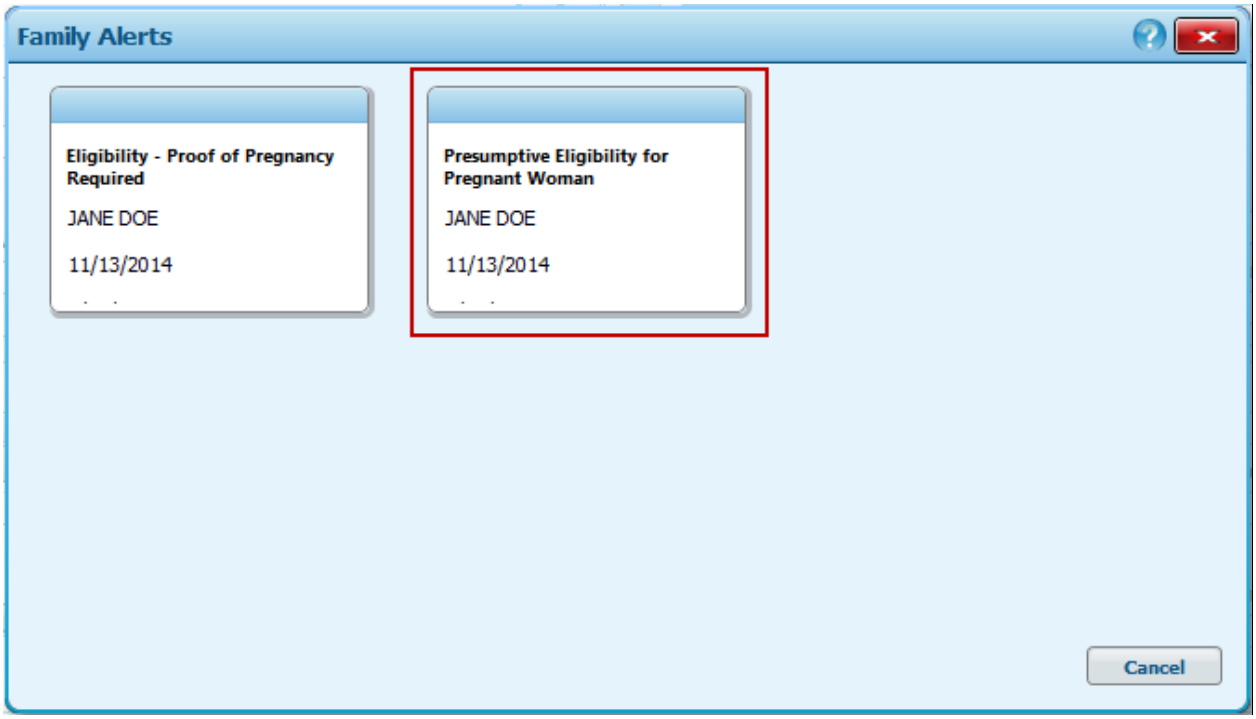


During the 60 day Certification period, if the required fields on Family assessment, Anthro/Lab screen and Health Information are completed and a risk factor other than 503 – Presumptive Eligibility is assigned then system will fully certify the pregnant woman based on Certification End date rule for pregnant woman certification.

If the presumptive eligible pregnant woman is not fully certified within 60 days period then Clinic End of day process will terminate the Certification with a termination reason “Presumptively Eligible” at the end of 60 days.

In cases where a presumptively eligible pregnant woman is not fully certified within 60 days and her presumptively eligible Certification is terminated, she can be Subsequently Certified for the same pregnancy.

10. View the **Family Alert** below.

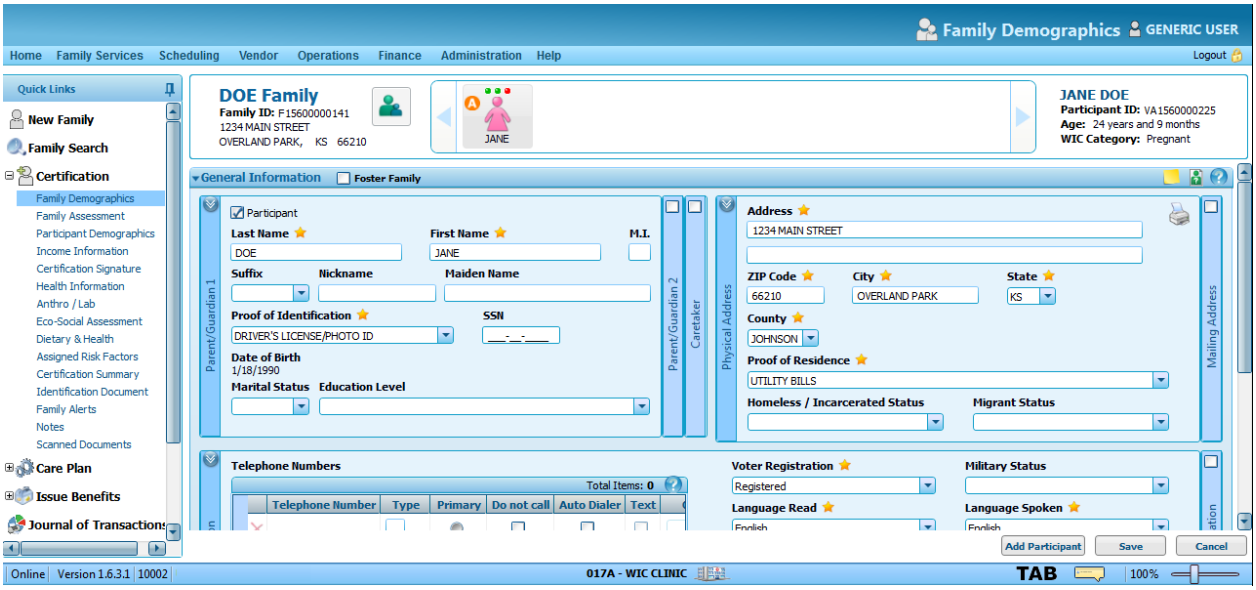


A family alert is added automatically by the system for a pregnant woman that is certified with the 503 – Presumptive Eligibility risk factor.

Task C. Assigning a Risk Factor to Remove Presumptive Eligibility

Complete the following steps to perform this task:

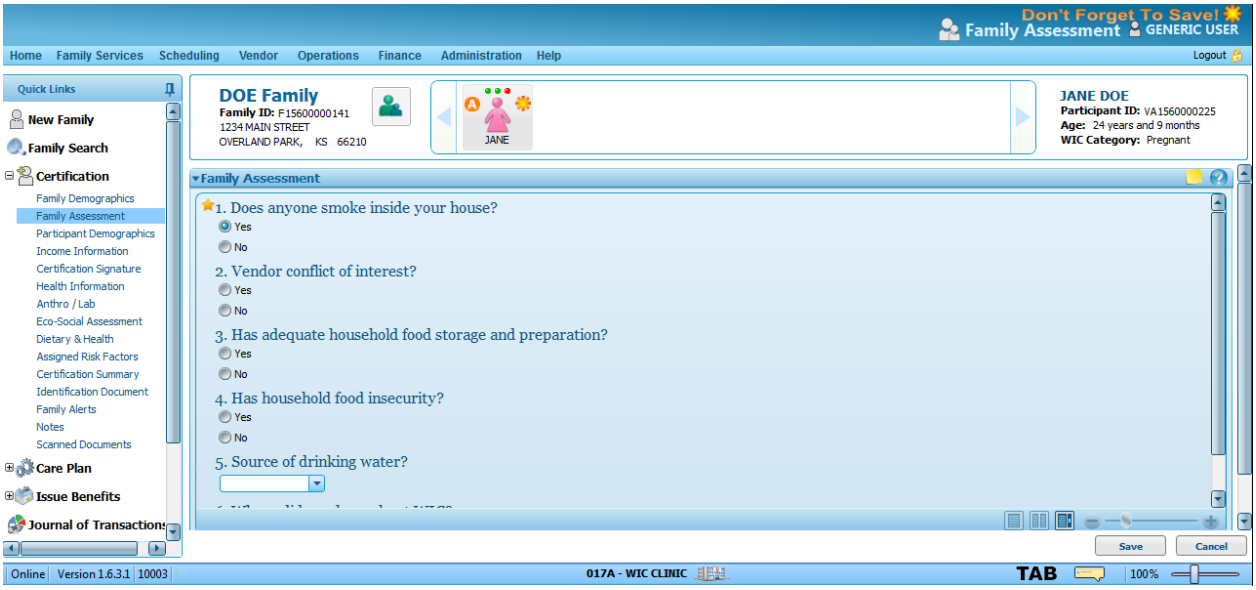
1. On the **Family Search** screen, under **Search Results**, click the **Edit** button ( ) to access (or open) the family record. You are navigated to the **Family Demographics** screen.



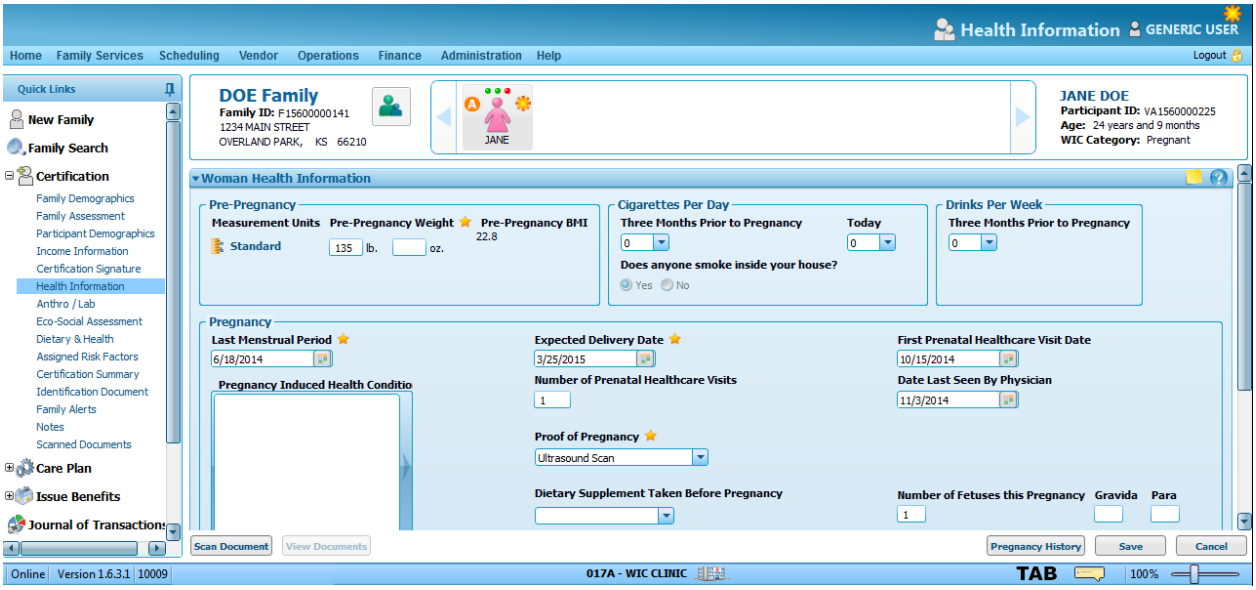
When a Pregnant woman is certified using the 503 – Presumptive Eligibility risk factor, it is possible to bypass adding information to the Family Assessment, Health Information, and Anthro/Lab screens. To remove the presumptive eligibility Certification and to fully certify the woman, it is necessary to complete the screens that were bypassed. You may document information such as a hemoglobin value that results in a system assigned risk factor (depending on the value) or you may need to navigate to the Assigned Risk Factors screen and manually enter or select the appropriate risk factor based on the information provided by the participant. Once all of the information has been collected for these screens, the participant's presumptive eligibility is removed and the participant can be certified to the End Date as defined by the Certification process.

2. Navigate to the appropriate screen using the links under **Quick Links → Certification** to document the necessary information, so that a risk factor can be assigned.

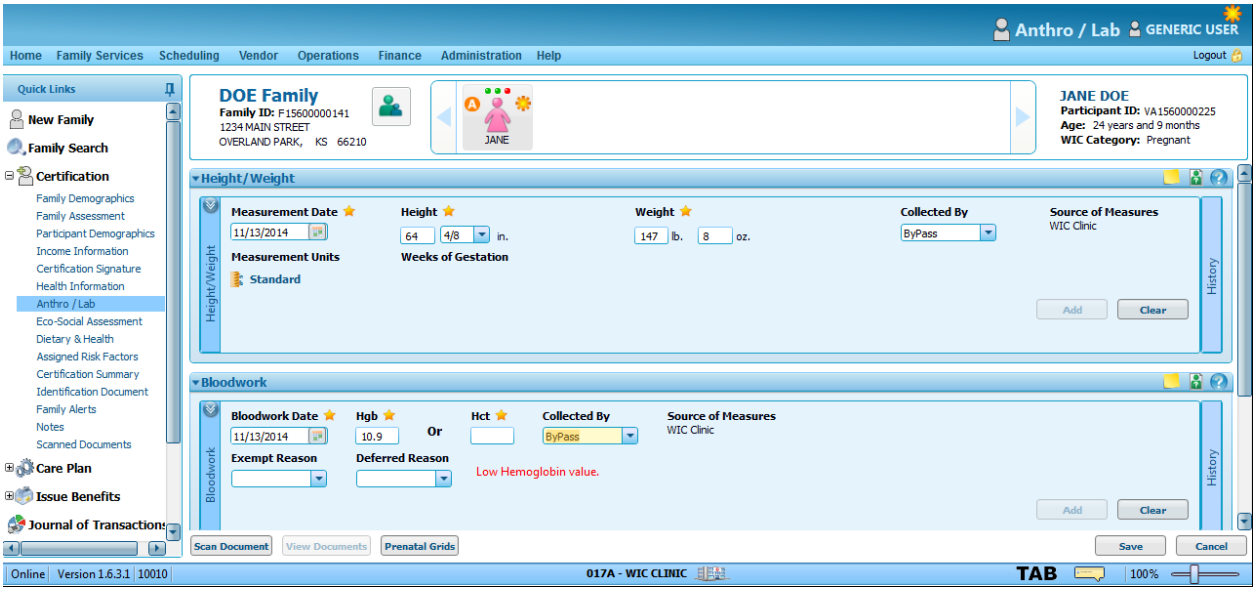
- Family Assessment screen (Environmental Tobacco Smoke Exposure)



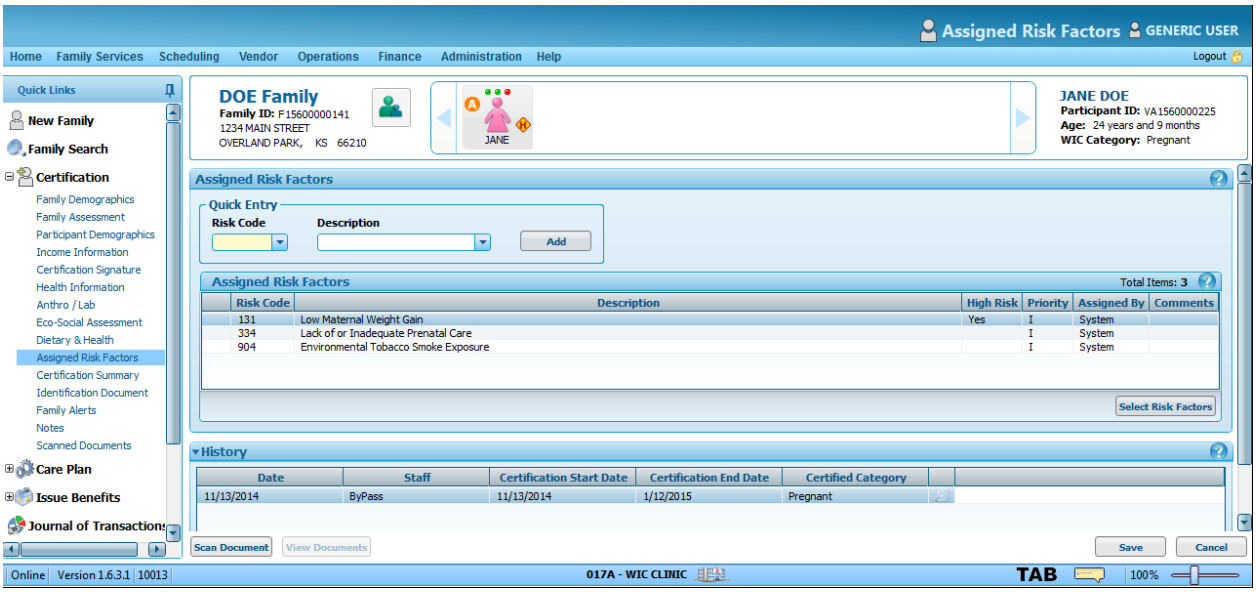
- Health Information screen



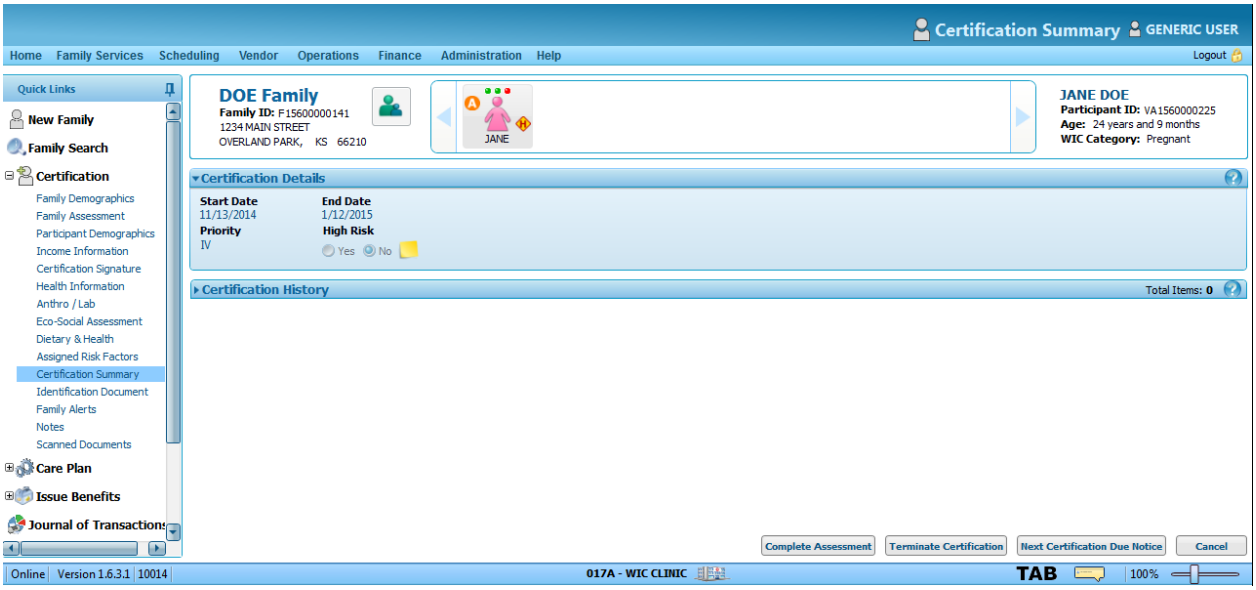
- Anthro/Lab screen (Low Hemoglobin)



- Assigned Risk Factors screen (Hypoglycemia)

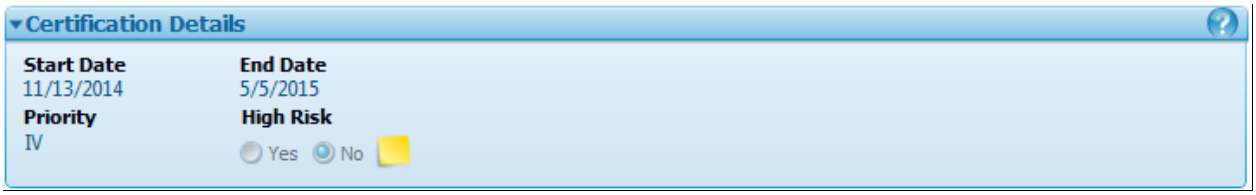


3. Go to **Quick Links → Certification → Certification Summary**. The **Certification Summary** screen displays.



A Complete Assessment button displays on the screen since the required information has been completed on the Family Assessment, Health Information, and Anthro/Lab screens.

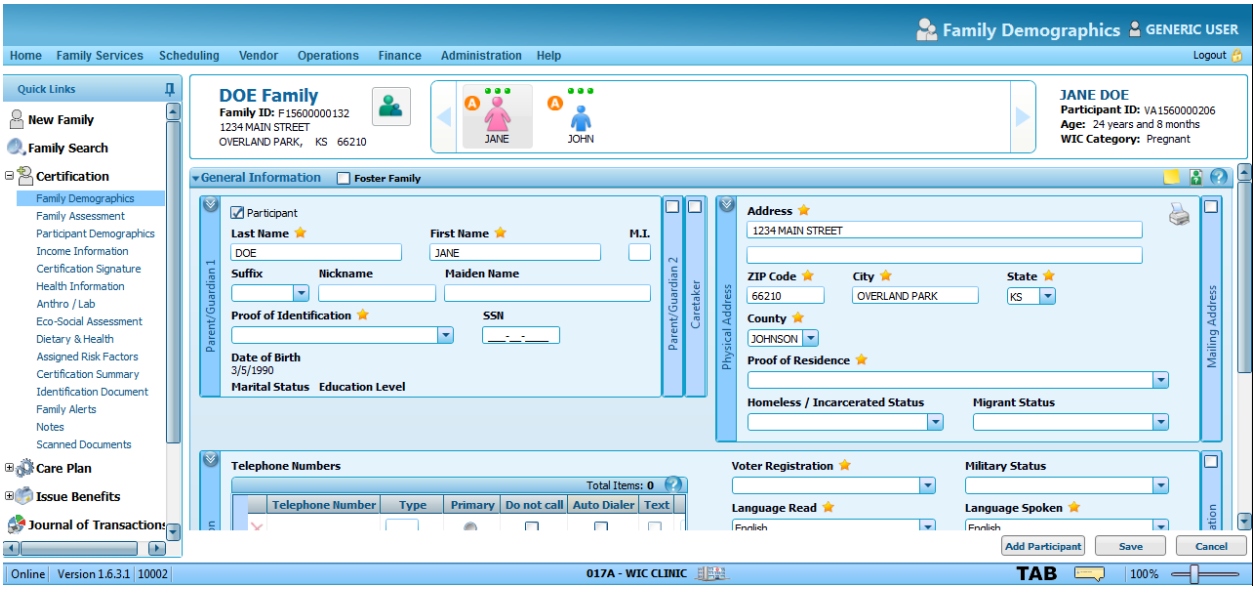
4. Click **Complete Assessment** to remove the presumptively eligible Certification and to activate the standard Certification period. A status message displays indicating success and the **Certification Details** container is updated and displays the new Certification period.



Task D. Documenting Missing Proof – Pending Applications

Complete the following steps to perform this task:

1. On the **Family Search** screen, under **Search Results**, click the **Edit** button ( ) to access (or open) the family record. You are navigated to the **Family Demographics** screen.



2. Under **Quick Links → Certification**, review the list of links to identify the links that still need to be completed.

> Certifications can remain pending for a number of days set by the state, as the configurable Application Expire Days. Failure to complete the Certification within the required timeframe results in the record being marked Ineligible. An entirely new Certification process must be completed for the record in order to achieve an Active Certification once it has been marked Ineligible.

3. Complete each incomplete link documenting the missing information.
4. Go to **Quick Links → Certification → Certification Summary**. The **Certification Summary** screen displays.
5. Take a moment to review the **Certification Summary** screen for accuracy and completeness. Once you are satisfied that the information displayed is accurate and complete, you can complete the next step.

> If Certification information is missing or incomplete, simply click the desired screen link to return to the screen and make changes as necessary. Return to the Certification Summary screen when you are ready to complete the Certification.

6. Click **Certify** to complete the certification process. A status message displays indicating success and the **Certification Summary** screen is refreshed.

Congratulations!

You have successfully completed the **Working with Other Types of Certification** process.

6- INCOME SCREENING CALCULATOR

Income Screening Calculator

The **Income Screening Calculator** screen allows you to estimate income eligibility for a family prior to creating a family record. The estimated eligibility uses the family size and reported income and displays the family's eligibility status. This screen allows the user to enter income information; however, no information is saved. Use this screen to calculate an applicant's eligibility for the program.

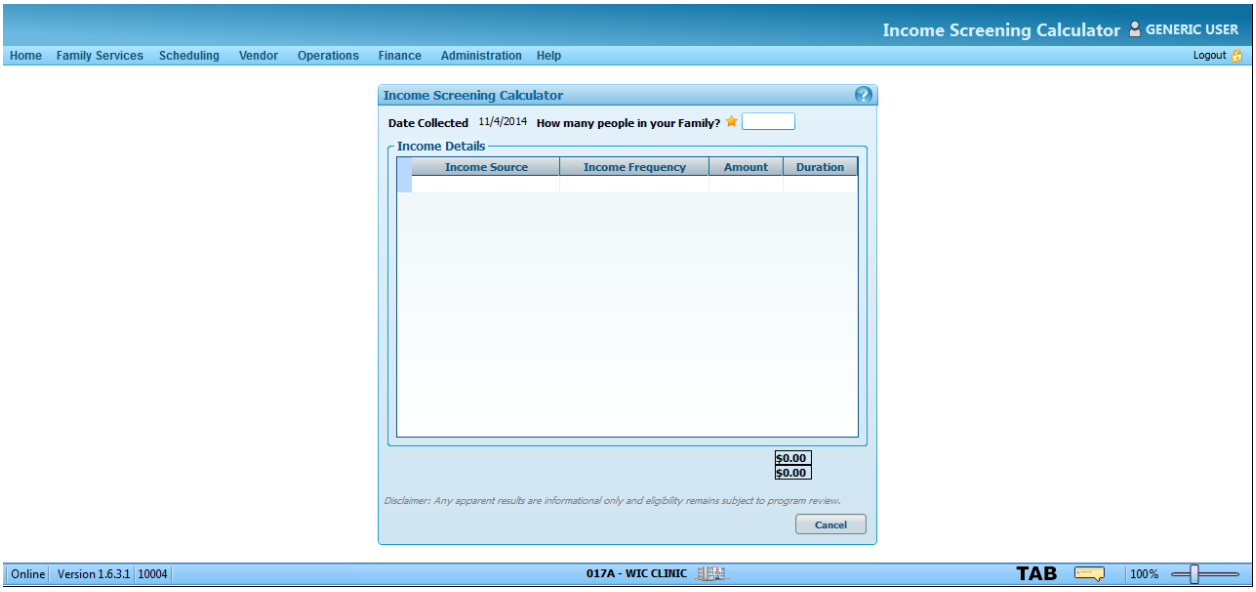
This process includes the following task:

Task A. Calculating Income for an Applicant 6-2

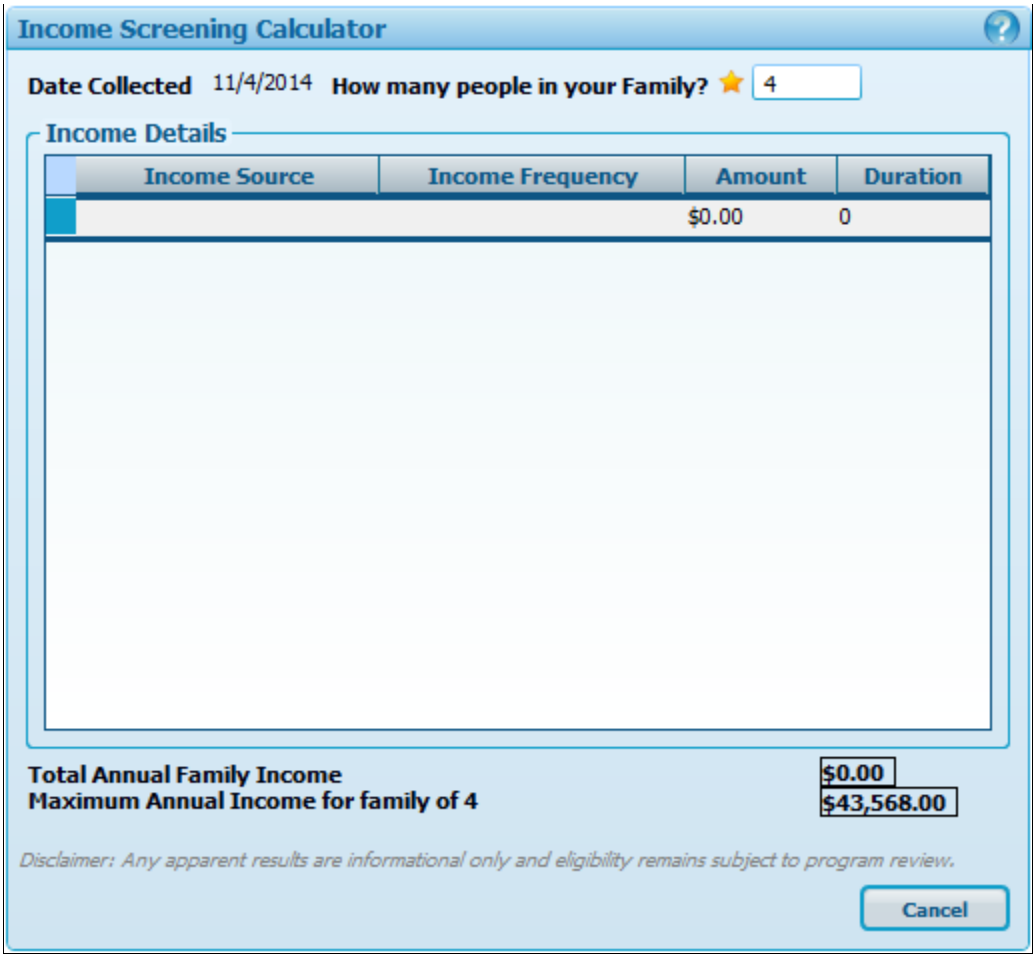
Task A. Calculating Income for an Applicant

Complete the following steps to perform this task:

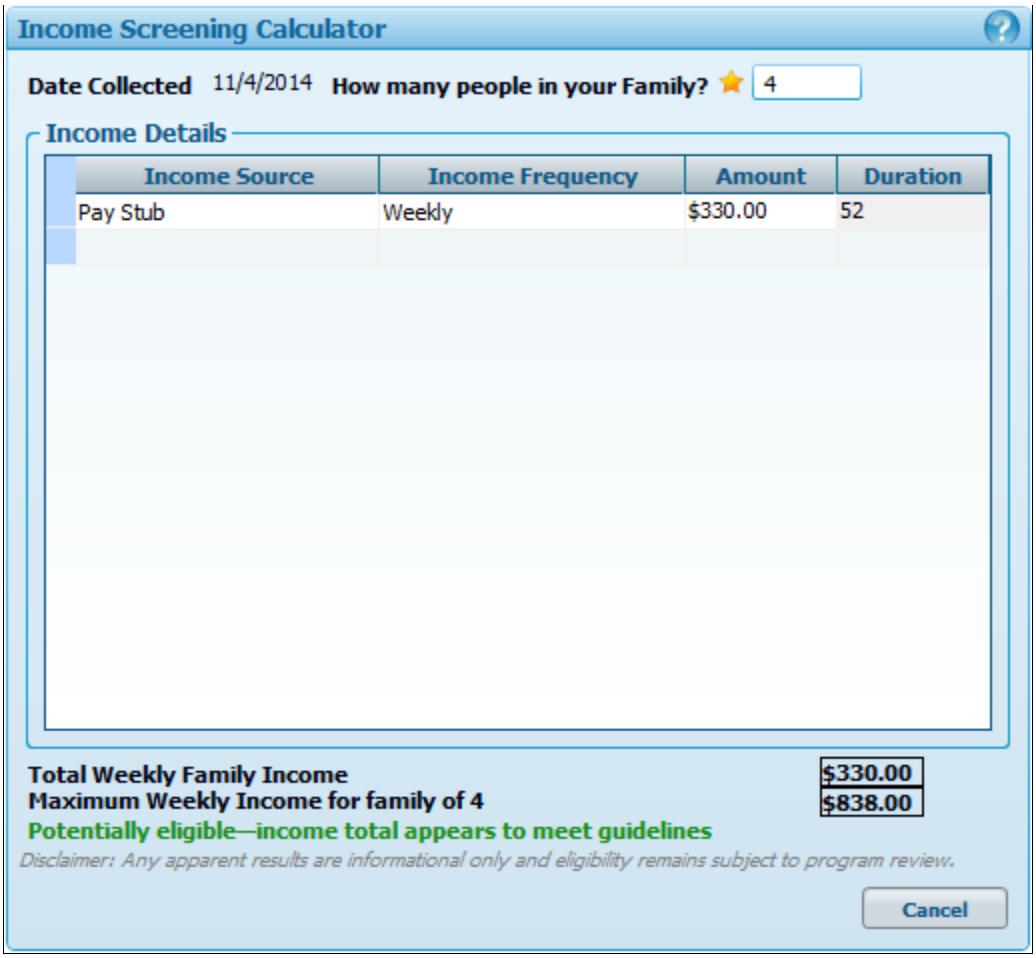
1. From the **Home** screen, go to **Family Services → Income Screening Calculator**. The **Income Screening Calculator** screen displays.

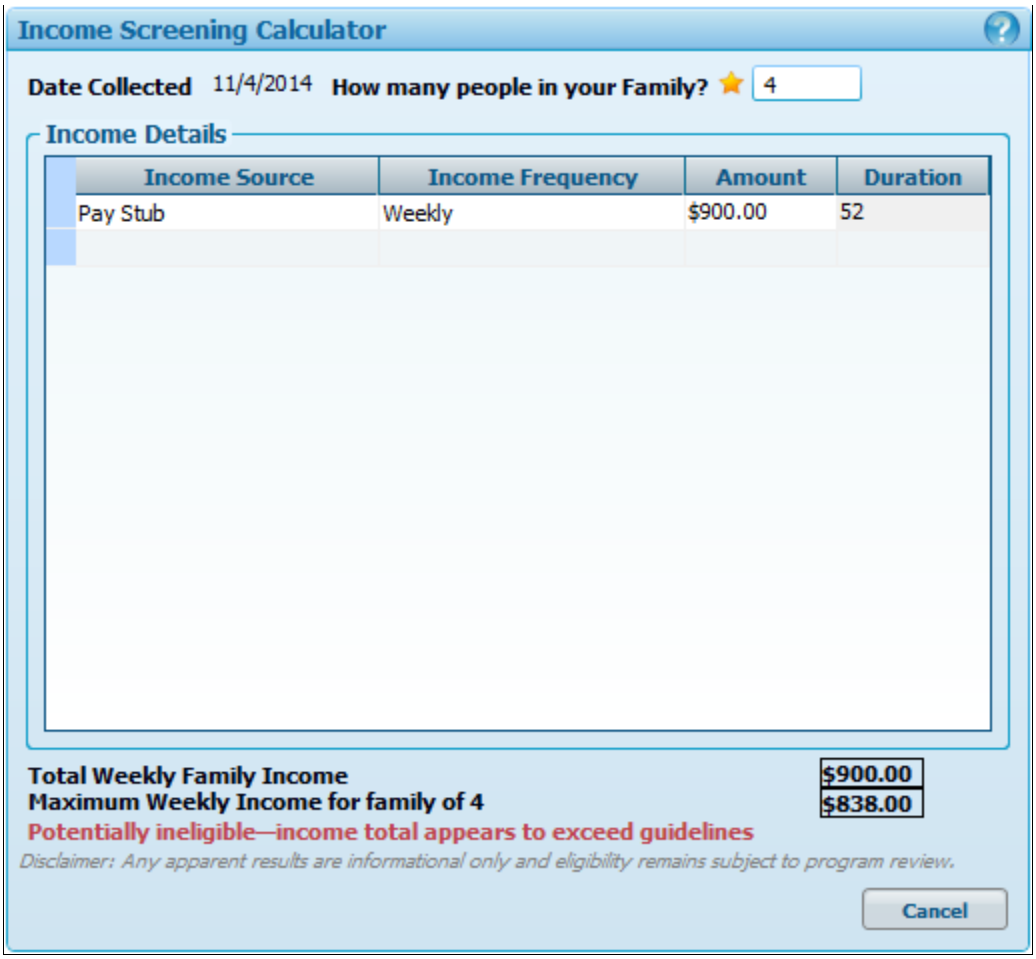


2. Enter the number of people in the family in **How many people in your Family**.



3. Complete the **Income Details** section by doing the following:
   a. Select **Income Source**.
   b. Select **Income Frequency**.
   c. Enter **Amount**.
   d. Update the **Duration**, as necessary.





e. Repeat the above sub-steps as need for additional income.

> The Duration automatically updates based on the selections made in Income Source and Income Frequency.
>
> The Total Family Income value and the Maximum Annual/Monthly/Weekly Income for family of values update automatically based on the value entered in Amount and Duration. Please review the applicant's eligibility based on income.

4. Click **Cancel**. The screen refreshes and redirects the user back to the previously displayed screen.

Congratulations!

You have successfully completed the **Income Screening Calculator** process.

THIS PAGE INTENTIONALLY LEFT BLANK

7- CARE PLAN

Breastfeeding Peer Counseling

Breastfeeding peer counselors and lactation consultants document interactions with breastfeeding and pregnant (if state defined) participants. Participant instructions may be entered regarding breastfeeding that are tailored to the participant's specific situation. Updates to the breastfeeding counselor contact information along with breastfeeding support are provided with follow-up information. The instructions regarding breastfeeding and the breastfeeding peer counselor care plan may be printed.

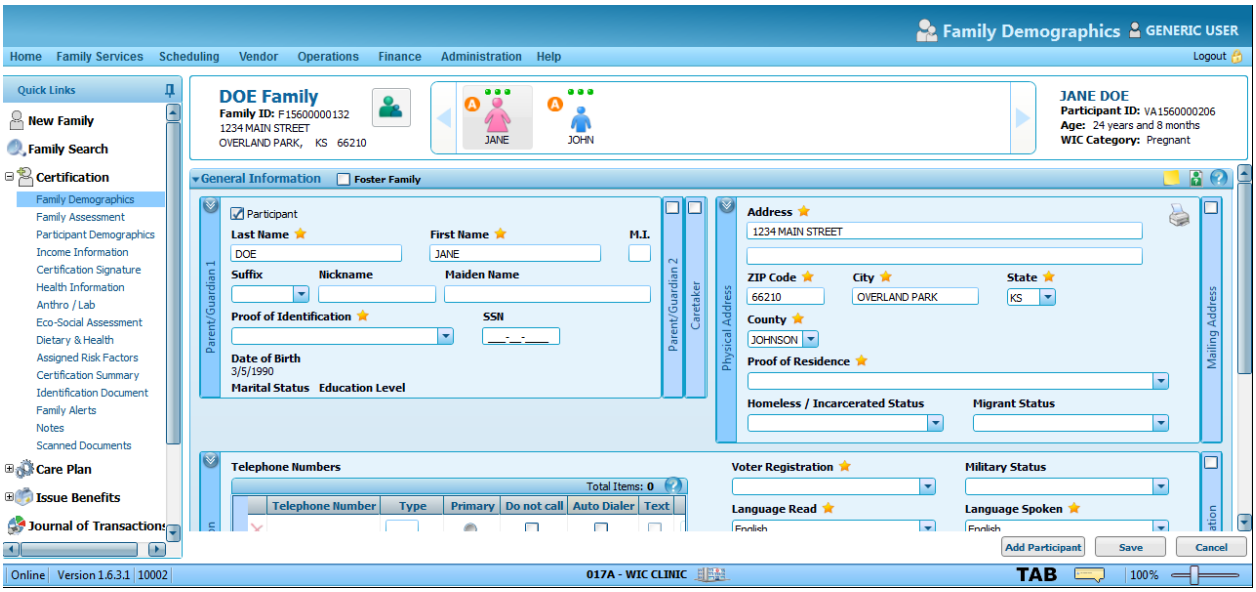
This process includes the following task(s):

Task A. Document Breastfeeding Peer Counselor and Lactation Consult Interactions with a Participant **7-2**

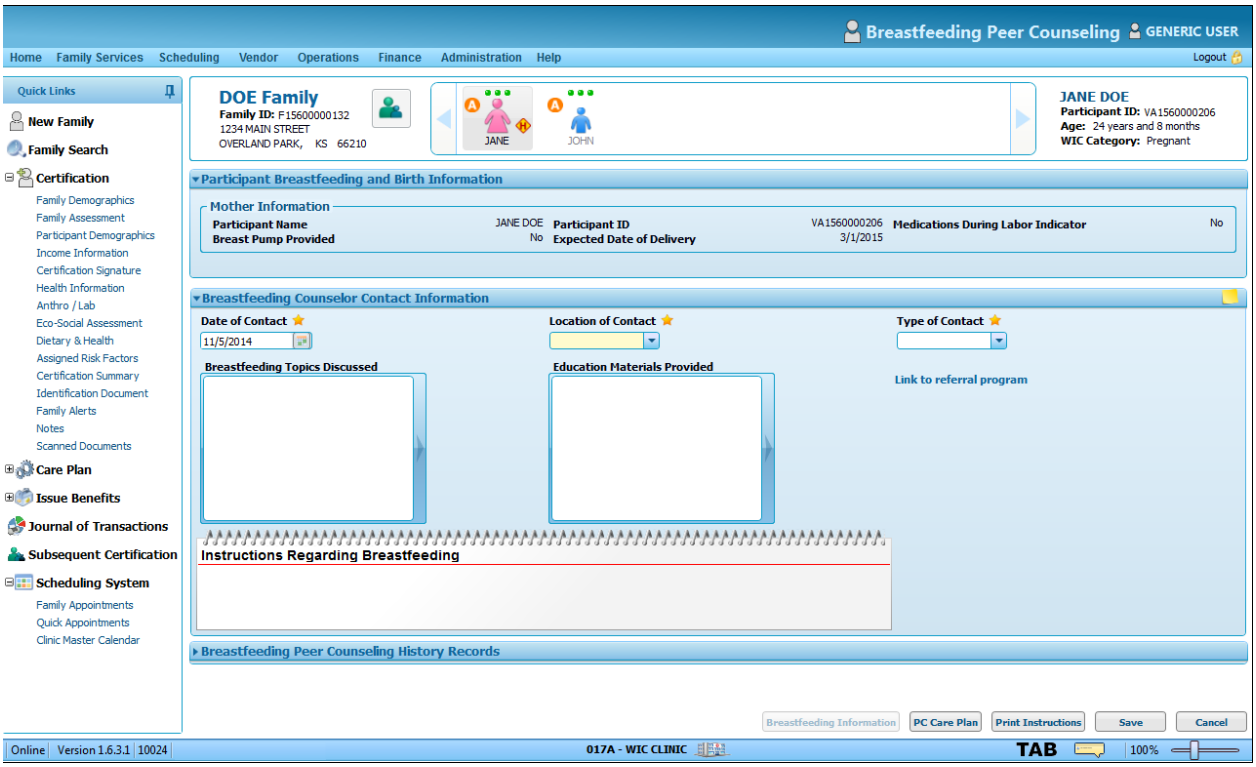
Task A. Document Breastfeeding Peer Counselor and Lactation Consult Interactions with a Participant

Complete the following steps to perform this task:

1. Access or open a breastfeeding or pregnant participant. The **Family Demographics** screen displays.



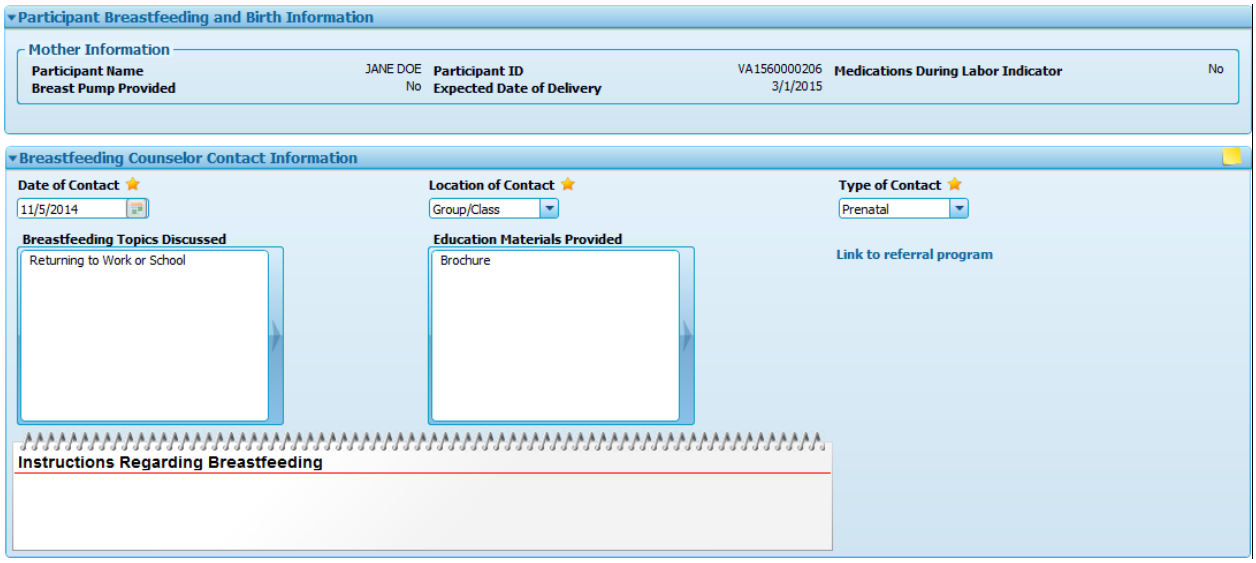
2. Go to **Family Services → Care Plan → Breastfeeding Peer Counseling**. The **Breastfeeding Peer Counseling** screen displays.

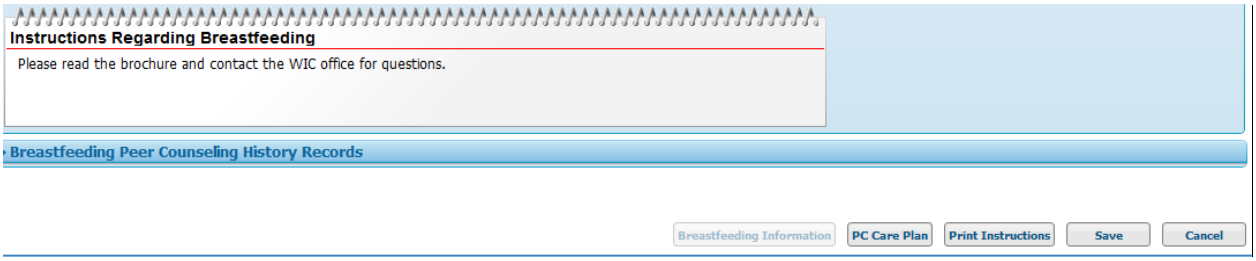


The participant breastfeeding and birth information section displays information regarding the mother and infants(s). Only the most recent breastfeeding information is displayed. If the family includes information about the mother participant only with no infant participant, the infant information is not displayed.

The Date of Contact defaults to the current date, but may be changed to reflect the actual date that the counseling occurred.

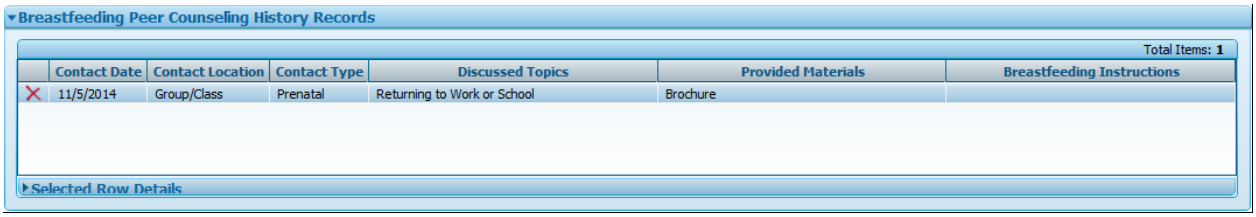
3. Select the **Location of Contact** from the drop down list box.
4. Select the **Type of Contact** from the drop down list box.
5. Select **Breastfeeding Topics Discussed**.
6. Select the **Education Materials Provided**.

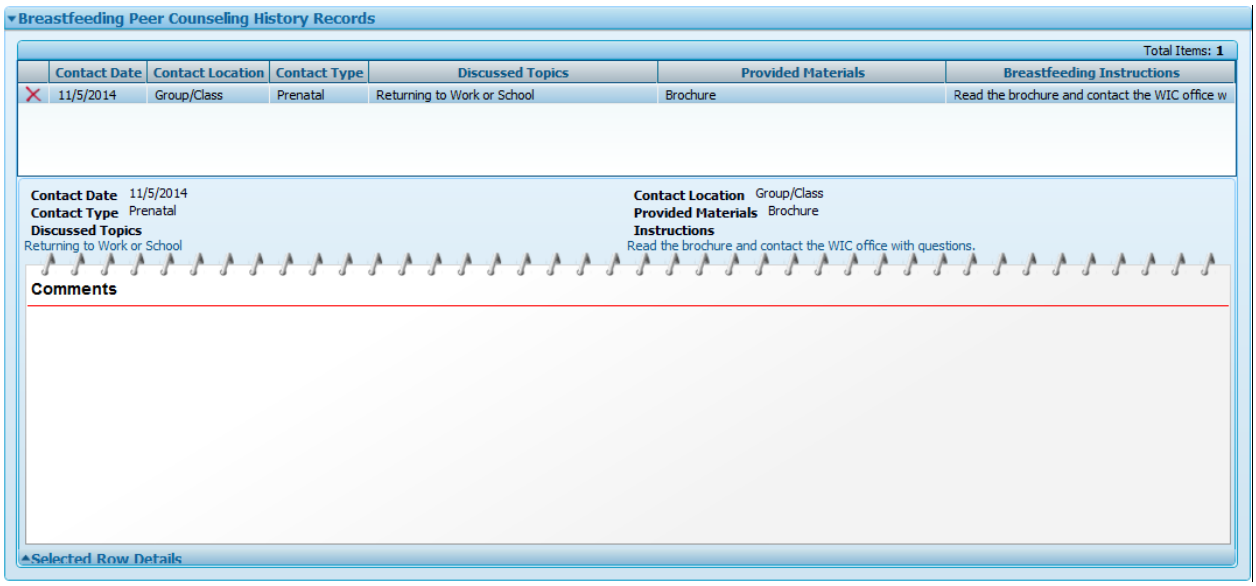




The consultants have the option to enter free text under Instructions Regarding Breastfeeding. When the note is complete, click the Print Instructions button and have a printed copy available for the participant. Once you save the instructions, which will display on the Breastfeeding Peer Counseling History Records grid, the instructions can no longer be printed.

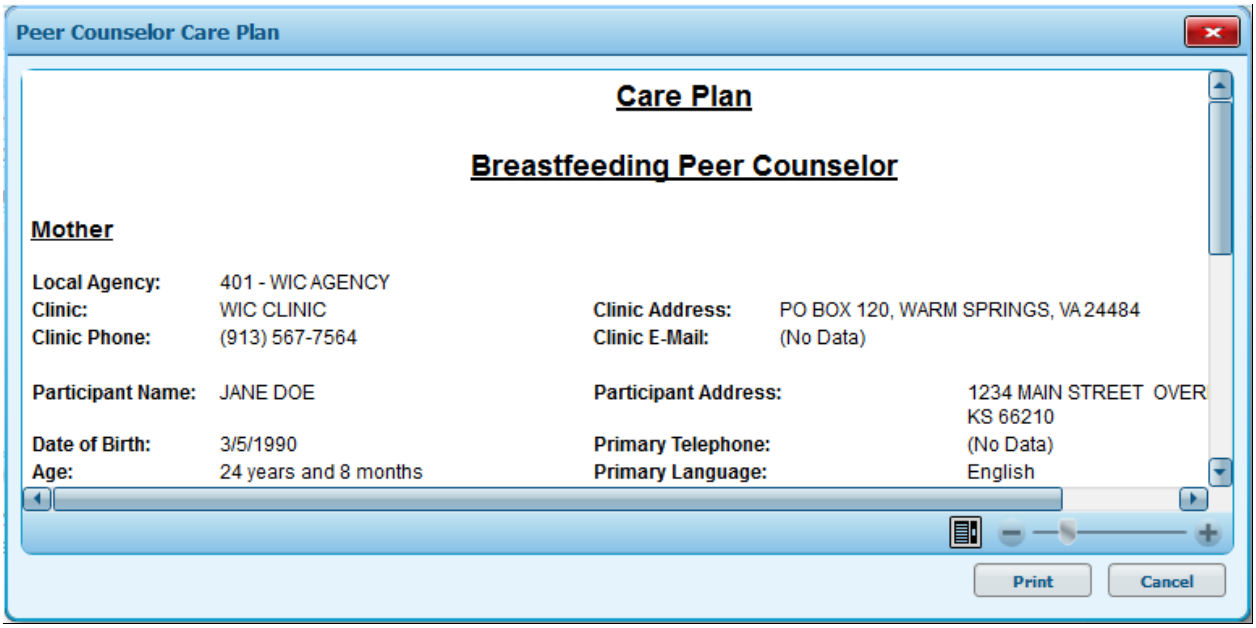
7. Click **Save**. The screen refreshes and a status message displays **Peer Counseling Information** was saved successfully. The information displays under **Breastfeeding Peer Counseling History Records**.

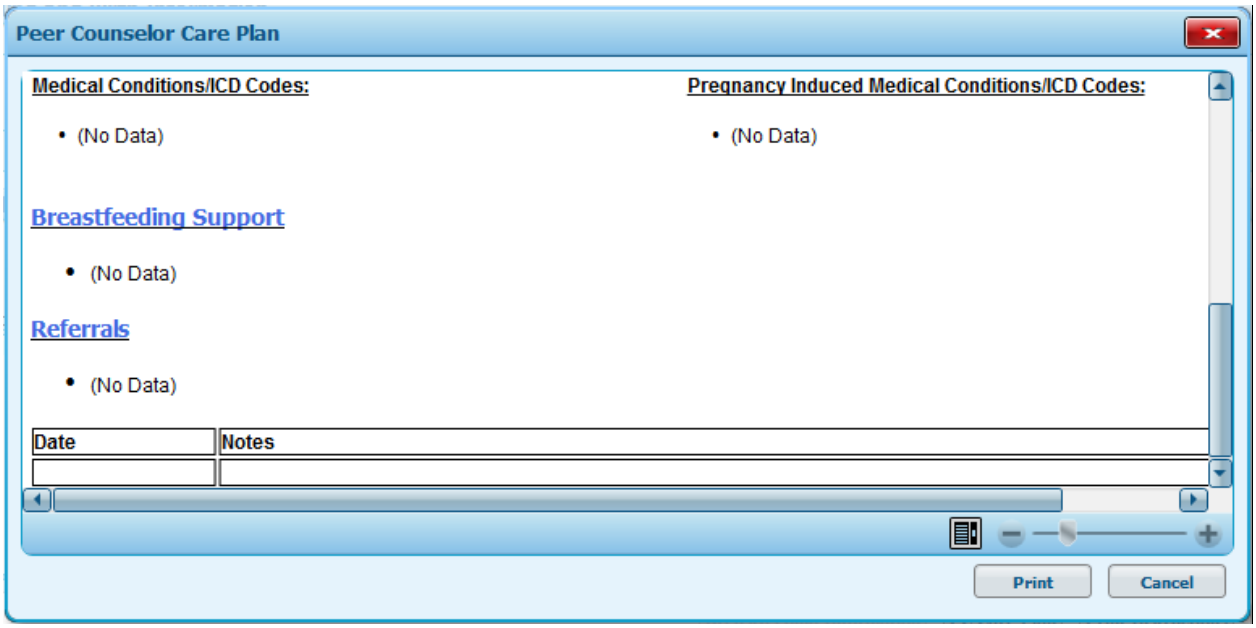




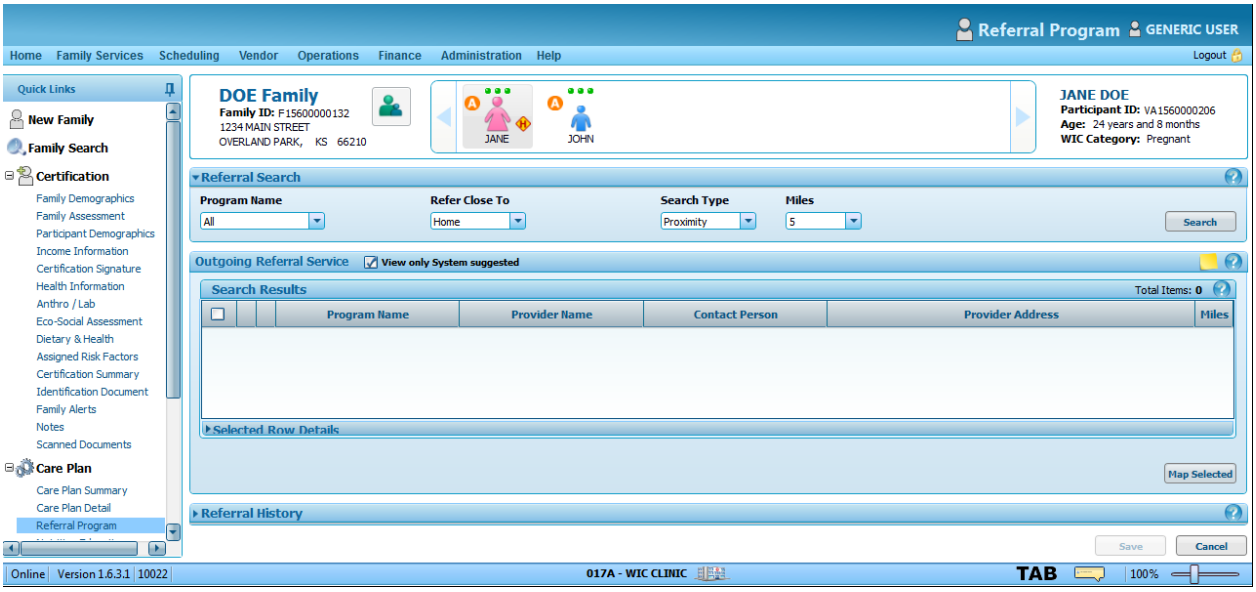
Expand the Breastfeeding Peer Counseling History Records section to view the peer counseling interaction history. Highlight a row in the counseling history list and expand the Select Row Details.

8. Click on the **PC Care Plan** button. The **Care Plan Breastfeeding Peer Counselor** document displays. The **Care Plan** document can be viewed, printed, and given to the participant.

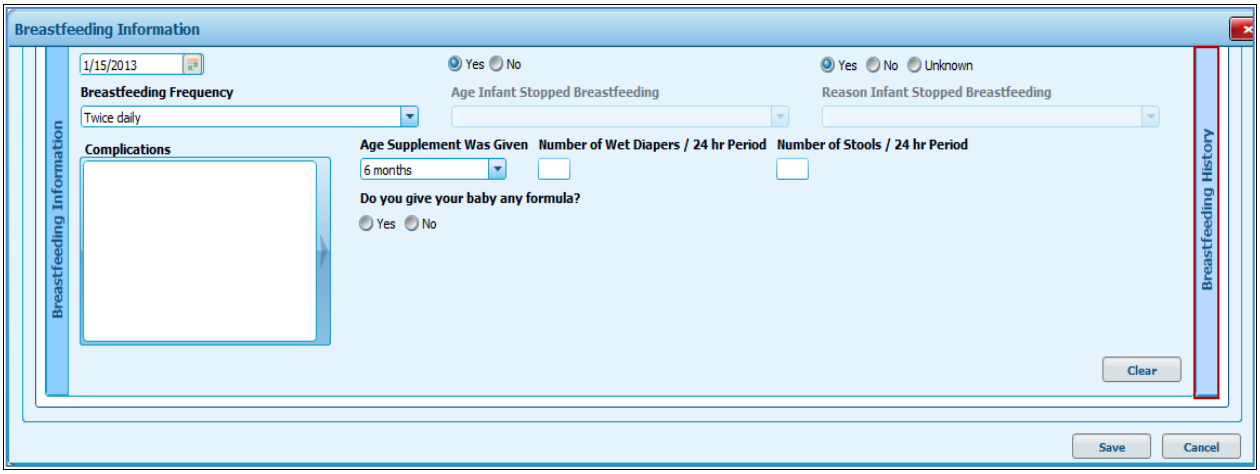




9. Click the **Referrals** link. The **Referral Program** screen displays where a referral can be made for the family participants.

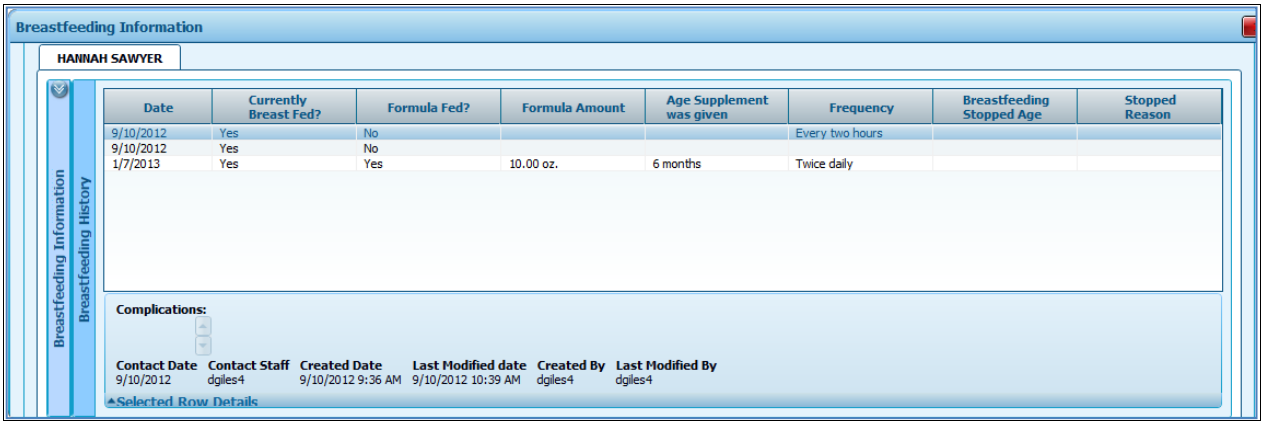


10. Click **Breastfeeding Information**. The **Breastfeeding Information** screen displays.

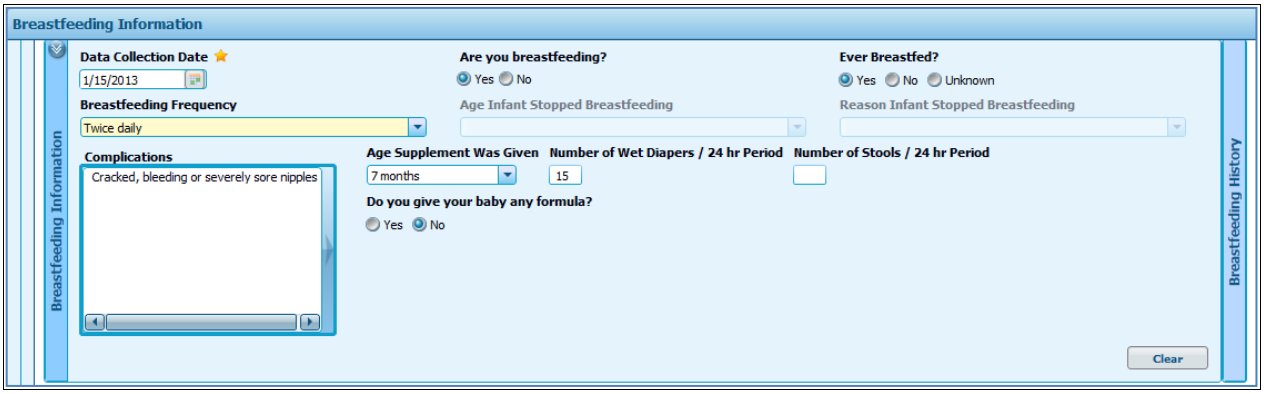


While in the Breastfeeding Peer Counseling screen, the user can view/modify the Breastfeeding Information/history screen. Bear in mind that updates to this screen may change the feeding status of the infant. It may be necessary for a Competent Professional Authority (CPA) to prescribe a new food prescription based upon the updates made to this screen.

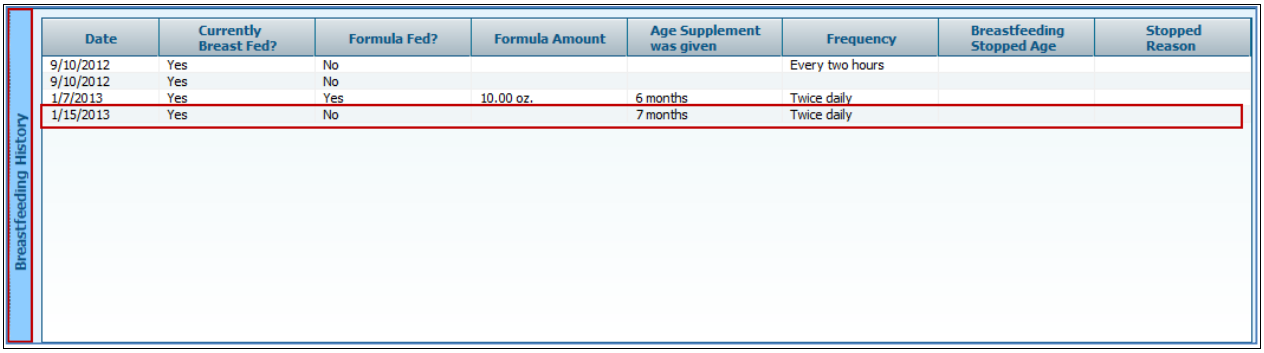
11. Click the **Breastfeeding History** content flipper to view details of the **Breastfeeding History**.



12. Make any necessary changes to the **Breastfeeding Information** screen.



13. Click **Save**. The screen refreshes and the changes display on the **Breastfeeding History** screen.



Date	Currently Breast Fed?	Formula Fed?	Formula Amount	Age Supplement was given	Frequency	Breastfeeding Stopped Age	Stopped Reason
9/10/2012	Yes	No			Every two hours		
9/10/2012	Yes	No					
1/7/2013	Yes	Yes	10.00 oz.	6 months	Twice daily		
1/15/2013	Yes	No		7 months	Twice daily		

Congratulations!

You have successfully completed the **Breastfeeding Peer Counseling** process.

Care Plan Summary

The **Care Plan Summary** screen displays the most up-to-date information regarding family level goals, referrals, and nutrition education. The top portion of the screen is dedicated to information that applies to the entire family. The bottom portion of the screen includes an expandable container for each member of the family where individual nutrition assessments can be added and viewed.

As the name of the screen implies, the Care Plan Summary screen is a summary of information collected about the family and its members. It also includes links to other screens. Users can navigate to other screens using Quick Links or menus and document information, or users can navigate to other screens using the links displayed on the Care Plan Summary screen. The choice is up to the user.

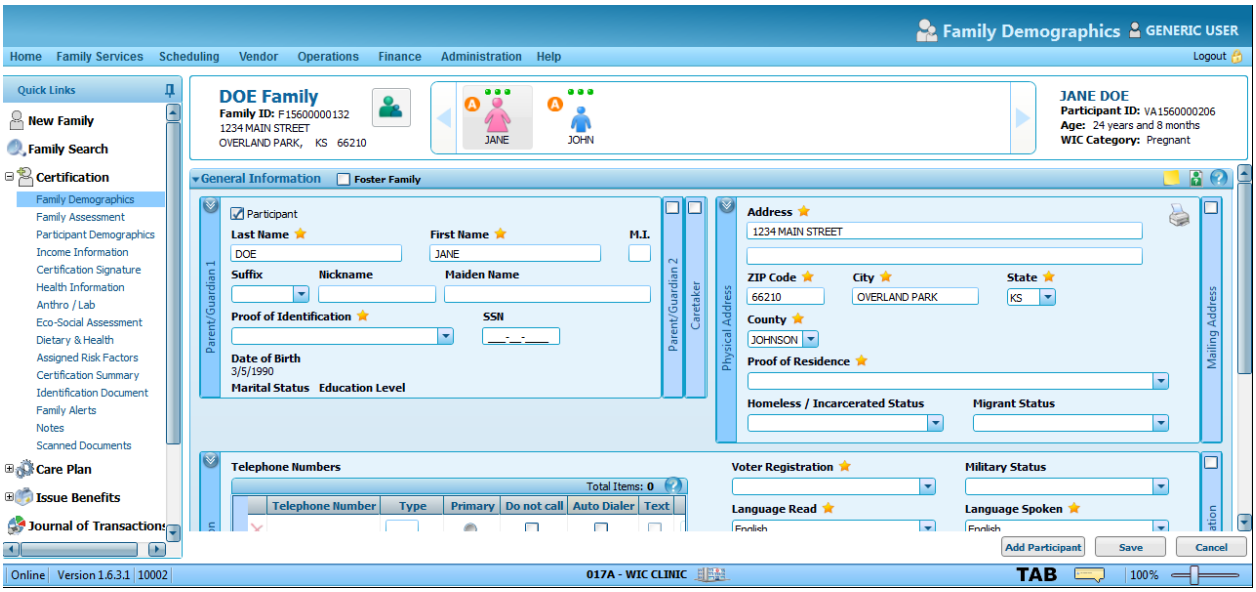
This process includes the following task(s):

Task A. Viewing the Family Care Plan Summary **7-10**
Task B. Viewing the Individual Care Plan Summary **7-12**

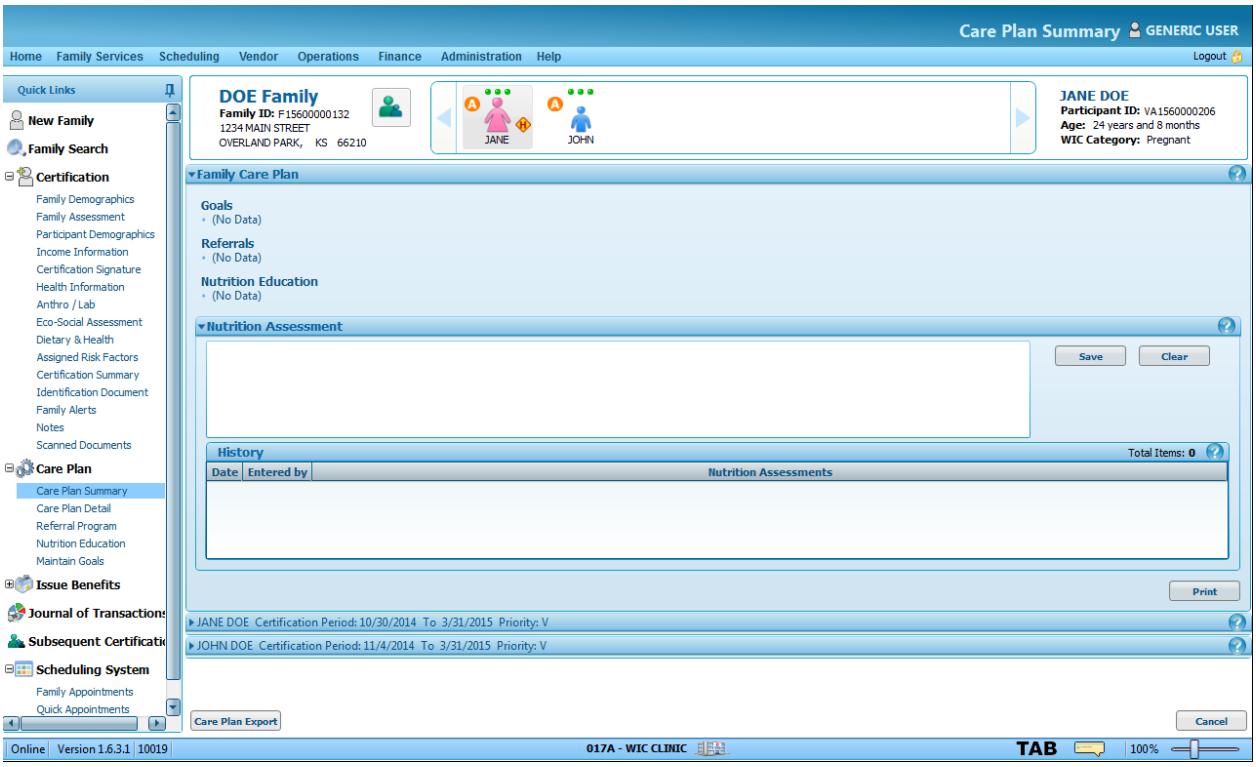
Task A. Viewing the Family Care Plan Summary

Complete the following steps to perform this task:

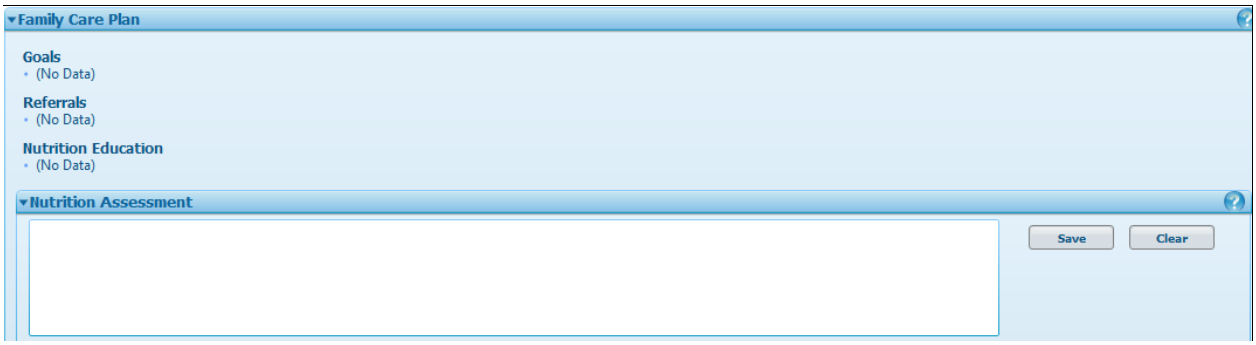
1. Access or open a **Family Record**. The **Family Demographics** screen displays.



2. Go to **Family Services → Care Plan → Care Plan Summary**. The **Care Plan Summary** screen displays.

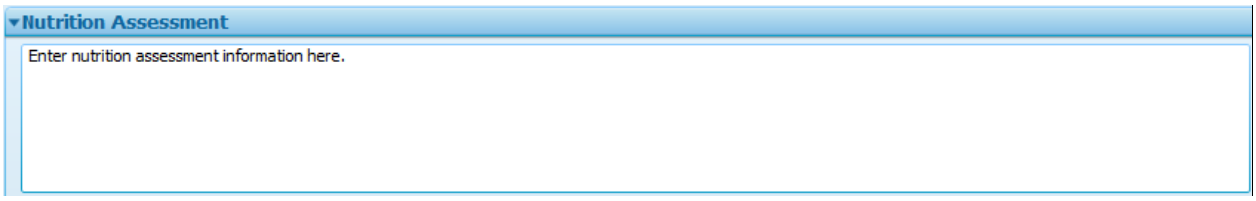


3. Review the assigned goals, referrals, and scheduled nutrition education classes on the **Family Care Plan**.

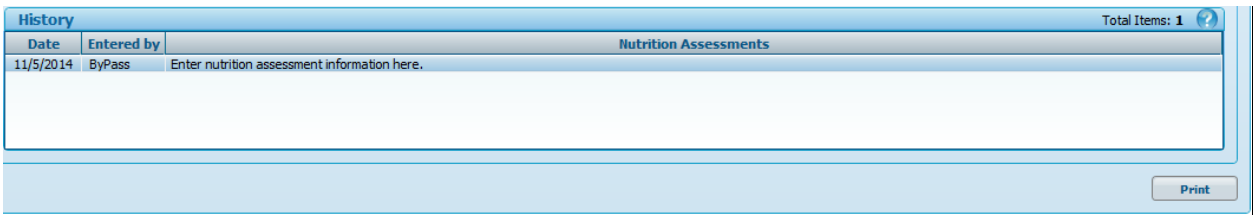


Click the Goals, Referrals, or Nutrition Education links to access the appropriate Care Plan screens and edit the details as needed. Once saved, the updated information displays on this screen.

4. Enter free-form comments in the **Nutrition Assessment** section as needed.



5. Click **Save**. The information from the **Nutrition Assessment** section will be added to the **History** grid.

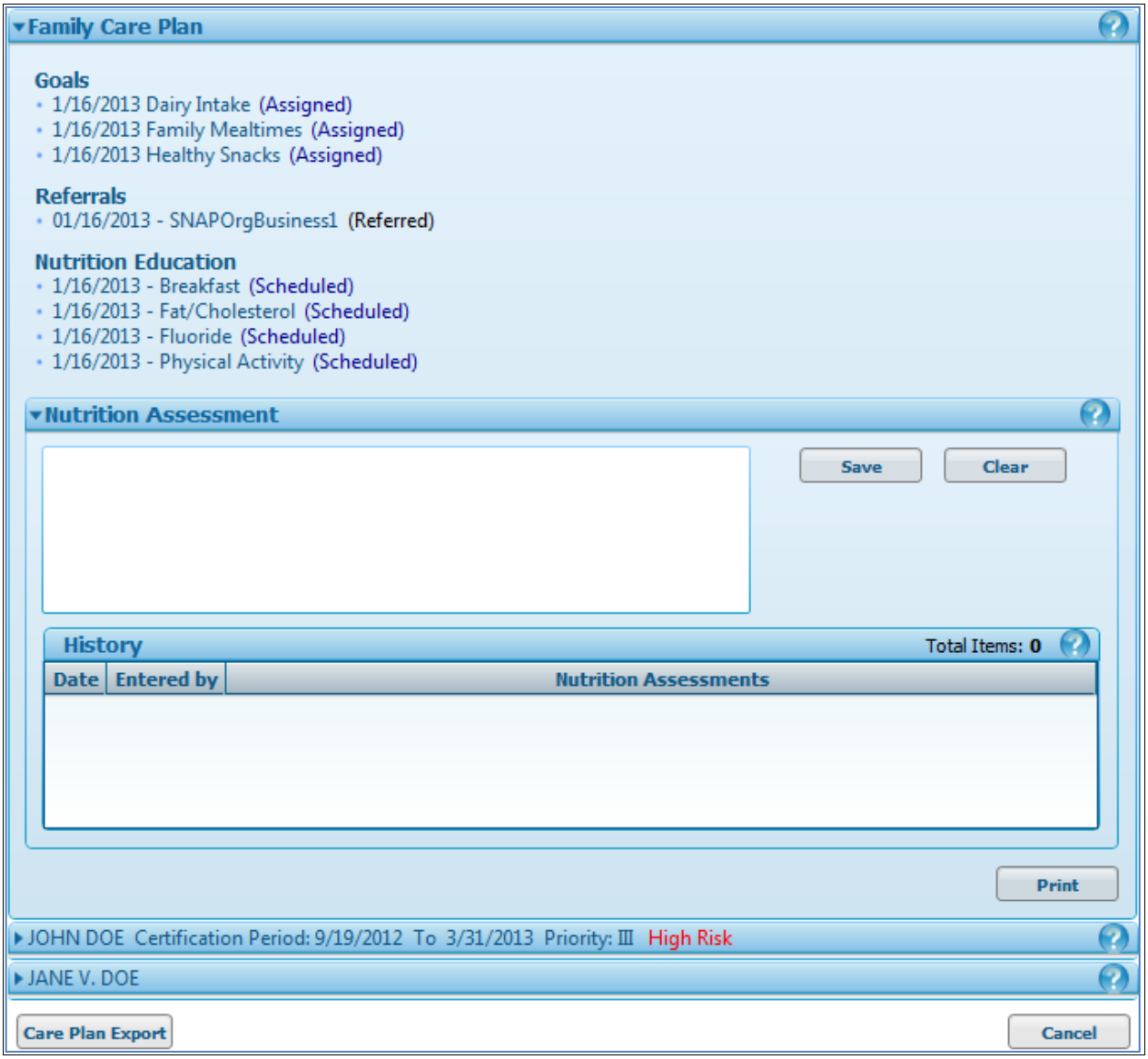


6. Click **Print** to print the **Family Care Plan Summary**.

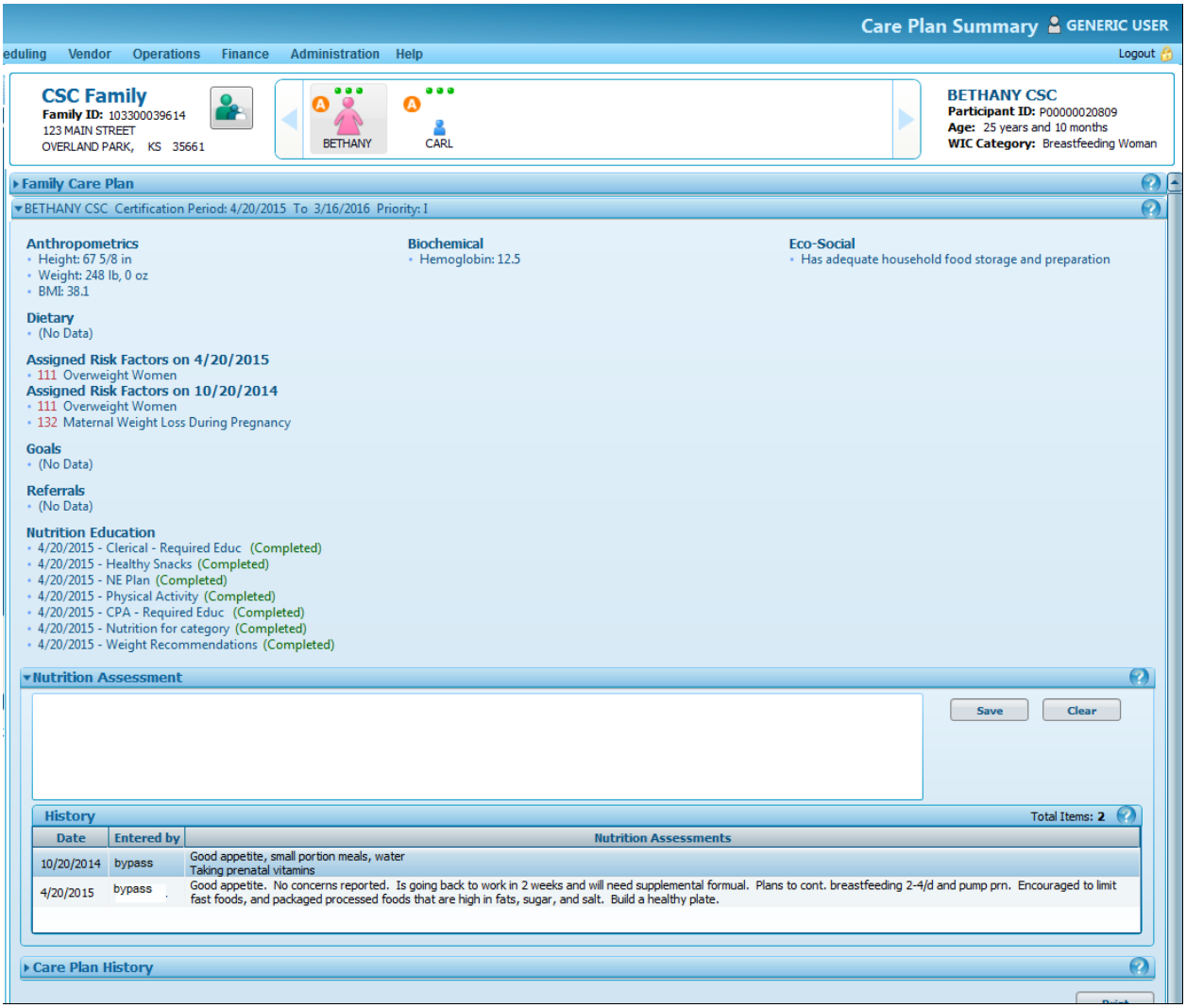
Task B. Viewing the Individual Care Plan Summary

Complete the following steps to perform this task:

1. Go to **Family Services → Care Plan → Care Plan Summary**. The **Care Plan Summary** screen displays.



2. Click a family member's name to view the **Care Plan Summary** for an individual family member.



3. Review the anthropometrics, biochemical, eco-social, dietary, assigned risk factors, immunization, goals, referrals, and nutrition education information in the individual care plan.

Click the anthropometrics, biochemical, eco-social, dietary, assigned risk factors, immunization, goals, referrals, and nutrition education links to access the appropriate screens and edit the details as needed. Once saved, the updated information displays on this screen.

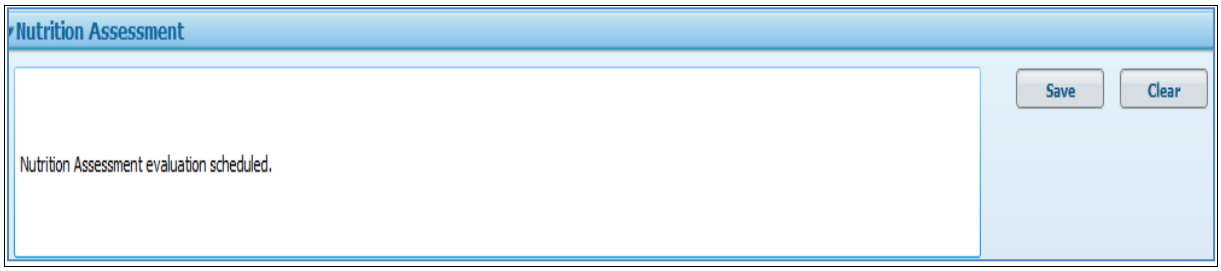
Risk factors are grouped by date and only newly assigned risk factors are populated for the date.

Goals and referrals do not carry forward from one certification to another, it will only be associated to the certification in which it was assigned. One exception is when a subsequent certification occurs within 30 days of the current certification end date the goal will be added to both certifications.

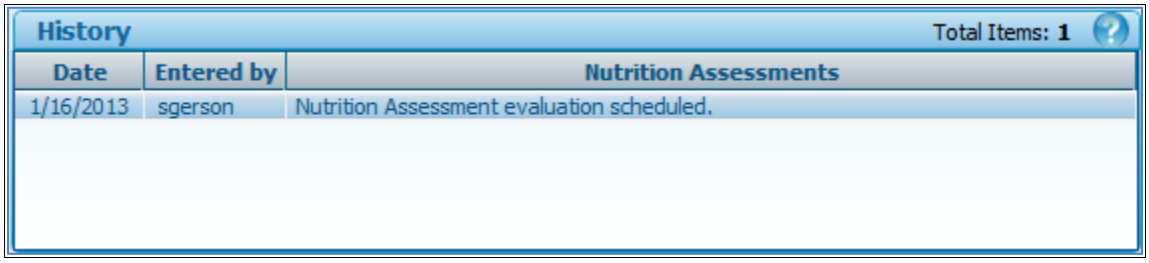
Nutrition Education does not carry forward from one certification to another, it will only be

associated to the certification in which it was assigned. When a subsequent certification is completed within 30 days of the current certification end date, the nutrition education will be assigned to the future certification period only as nutrition education contacts cannot be counted for multiple certifications.

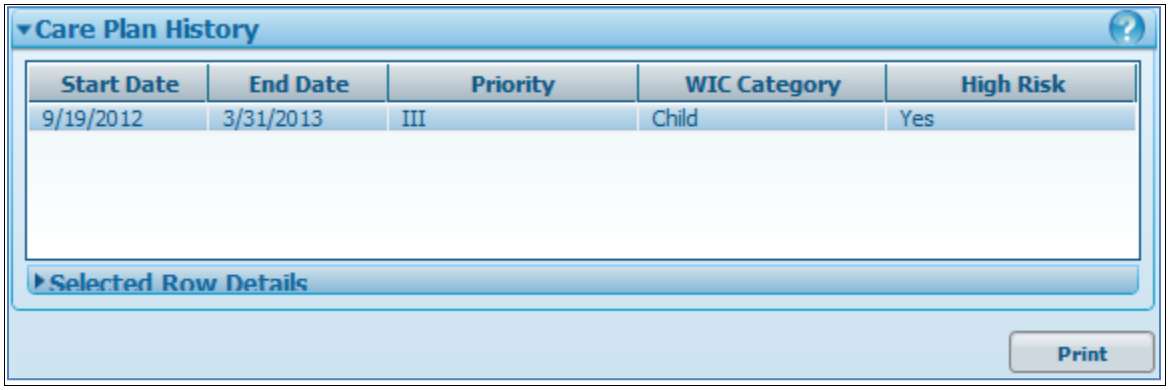
4. Enter free-form comments in the **Nutrition Assessment** section as needed.



5. Click **Save**. The information from the **Nutrition Assessment** section will be added to the **History** grid.



6. View the **Start Date**, **End Date**, **Priority**, **WIC Category**, and **High Risk** information in the **Care Plan History** grid.



7. Click **Selected Row Details** to view additional information about the highlighted row in the **Care Plan History** grid.

8. Click **Print History** to print the **Care Plan History**.

9. Click **Print** to print the individual **Care Plan Summary**.

Congratulations!

You have successfully completed the **Care Plan Summary** process.

Care Plan Detail

The **Care Plan Detail** screen displays the most up-to-date information on the selected participant. It provides the user with links to **Anthro/Lab**, **Health Information**, **Dietary & Health**, **Eco-Social**, **Assigned Risk Factors**, **Maintain Goals**, **Nutrition Education**, **Breast Pump Issuance**, **Prescribe Food**, **Referral Program**, and **Quick Appointment** screens.

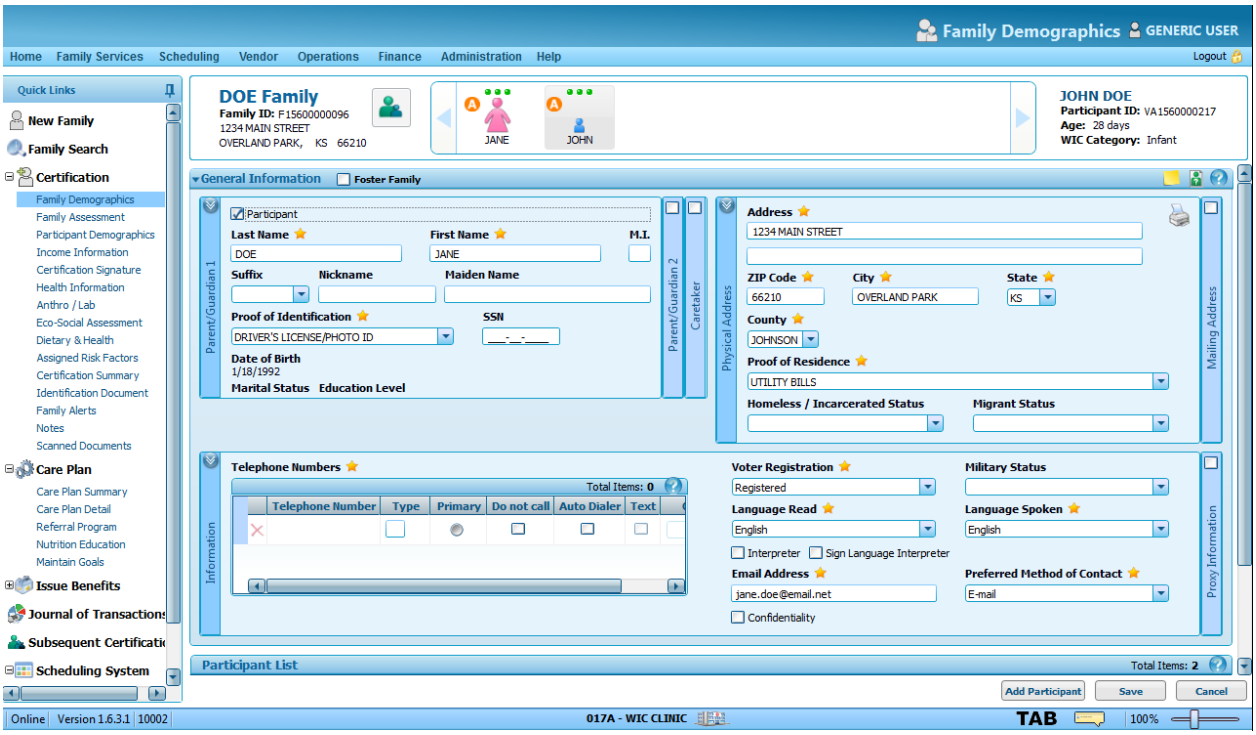
This process includes the following task(s):

Task A. Viewing Care Plan Details 7-17

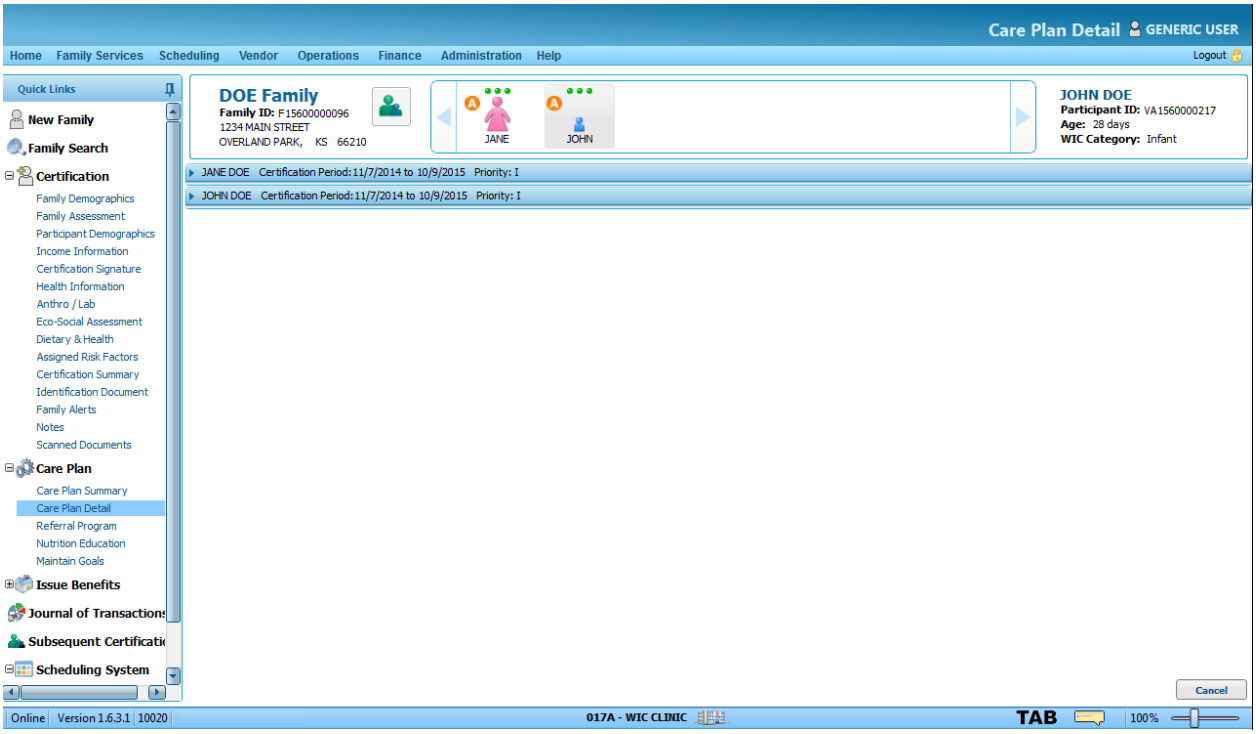
Task A. Viewing Care Plan Details

Complete the following steps to perform this task:

1. Access or open a **Family Record**. The **Family Demographics** screen displays.



2. Go to **Family Services → Care Plan → Care Plan Detail**. The **Care Plan Detail** screen displays.



3. Click a family member's name to view detailed information for an individual family member. The container is expanded and displays details about the selected individual.

4. Review the **Care Plan Detail** on the screen.

5. The **Care Plan Detail** screen includes a number of links that can navigate a user to other screens within the family record. If necessary, click one or more links (**Anthropometric**, **Biochemical**, **Clinical**, **Dietary/Health Behaviors**, **WIC Nutrition Risk**, **Goals**, **Nutrition Education**, **Breast**

Feeding Support, **Current Food Prescription**, **Referrals**, or **Next Scheduled Appointment)** to access the selected screens and edit the details as needed. Once saved, the updated information displays on the **Care Plan Detail** screen.

Risk factors are grouped by date and only newly assigned risk factors are populated for the date.

Goals and referrals do not carry forward from one certification to another, it will only be associated to the certification in which it was assigned. One exception is when a subsequent certification occurs within 30 days of the current certification end date the goal will be added to both certifications.

Nutrition Education does not carry forward from one certification to another, it will only be associated to the certification in which it was assigned. When a subsequent certification is completed within 30 days of the current certification end date, the nutrition education will be assigned to the future certification period only as nutrition education contacts cannot be counted for multiple certifications.

6. Click **Print** to print the **Care Plan Detail**.

Congratulations!

You have successfully completed the **Care Plan Detail** process.

Referral Program

This scenario will show you how to make and document referrals.

This process includes the following task(s):

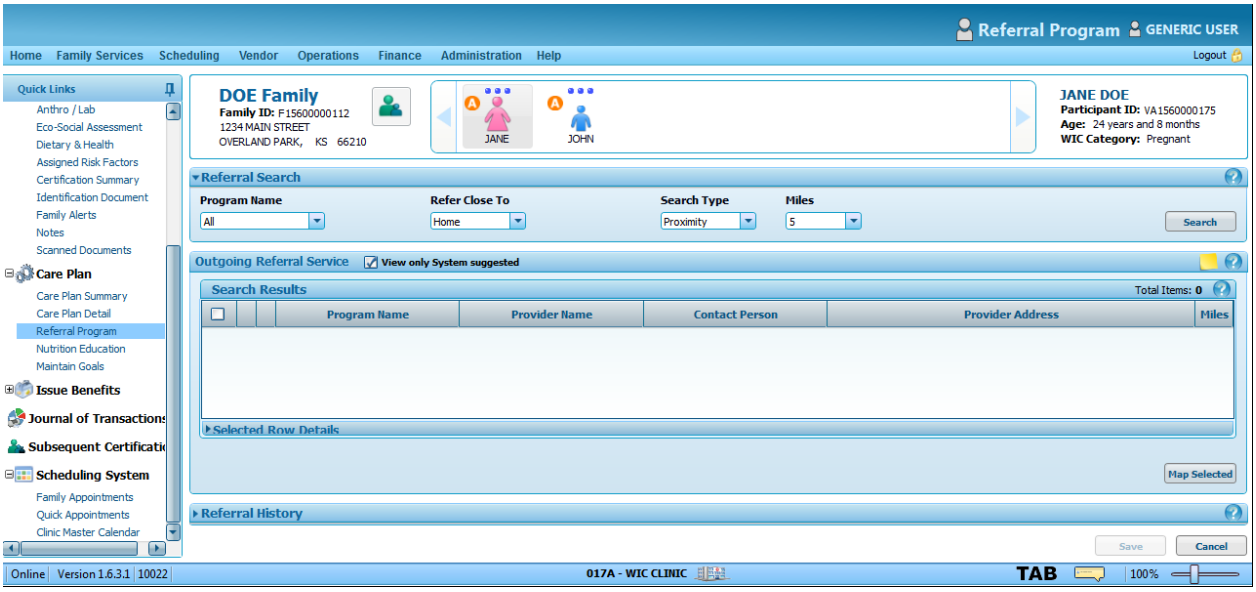
Task A. Making and Documenting Referrals **7-21**

Task A. Making and Documenting Referrals

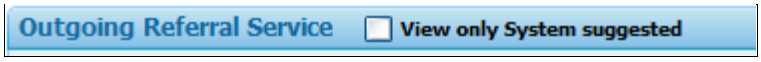
The WIC program is required to provide applicants and participants, or their designated proxies, with information on other health-related and public assistance programs such as the Medicaid and Food Stamp programs, and when appropriate, refer them to such programs. The system can track internal and external referrals made within the family and individual record and care plan. This scenario will guide you through making a referral. The **Referral Program** screen allows you to refer an individual to a specific program.

Complete the following steps to perform this task:

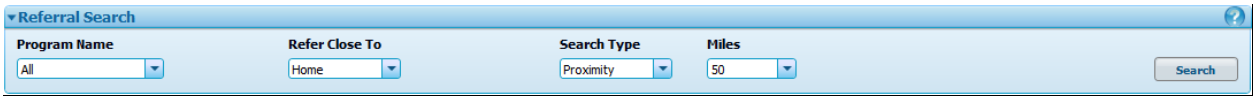
1. Go to **Family Services → Care Plan → Referral Program**. The **Referral Program** screen displays.



2. To increase the number of referrals to choose, clear the **View Only System Suggested** check box.



3. In the **Referral Search** group box, do one or more of the following:
   - Select the **Program Name** (All is selected by default).
   - Select **Refer Close To** (Home is selected by default).
   - Select **Search Type** (Proximity is selected by default).
   - Select **Miles** (5 is selected by default).



4. Click **Search**. The screen refreshes and the **Outgoing Referral Services** grid displays the search results.

Outgoing Referral Service ☐ View only System suggested

Search Results — Total Items: 8

	Program Name	Provider Name	Contact Person	Provider Address	Miles
☑	Immunization	Central ORG	JOE CONTACT	9102 ANTIOCH ROAD OVERLAND PARK 66210	9.98
☑	SNAP	SNAPOrgBusiness1	DG3 DG3	11901 Metcalf Ave OLATHE 66062	2.13
☐	TANF	TANFOrgBusiness1	DG2 DG2	10721 Roe Ave OVERLAND PARK 66211	0
☐	Low Hemoglobin	LowBloodWorkOrg1	DG3 DG3	11001 Roe Ave OLATHE 66062	0.37
☐	Homeless	HomeLessOrg1	DG2 DG2	11951 Metcalf Ave OVERLAND PARK 66210	2.19
☐	Medicaid	MedicAidOrg1	JOE CONTACT	9102 ANTIOCH ROAD OVERLAND PARK 66210	9.98
☐	School Lunch	SchoolLunchOrg1	DG3 DG3	9102 ANTIOCH ROAD OVERLAND PARK 66210	9.98
☐	MH	MH Organization	DG3 DG3	9102 ANTIOCH ROAD OVERLAND PARK 66210	9.98

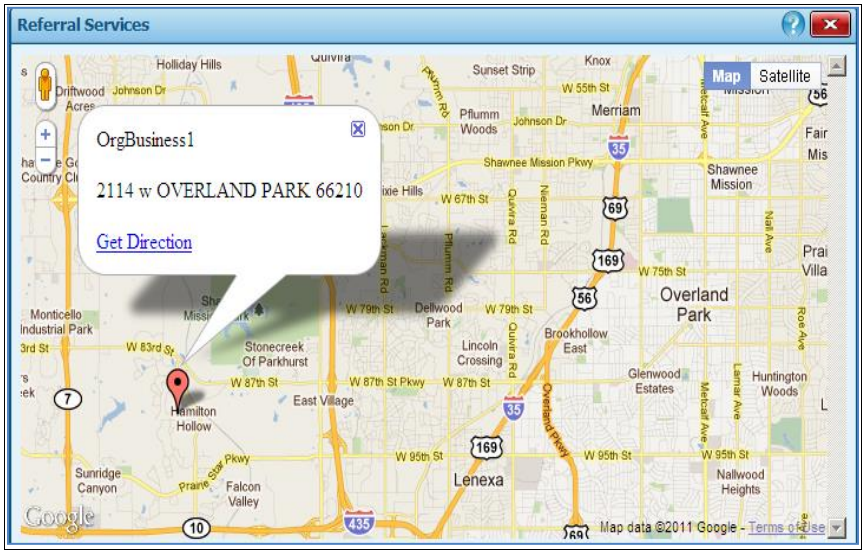
5. Under **Outgoing Referral Service**, select one or more referral service options.

Outgoing Referral Service ☐ View only System suggested

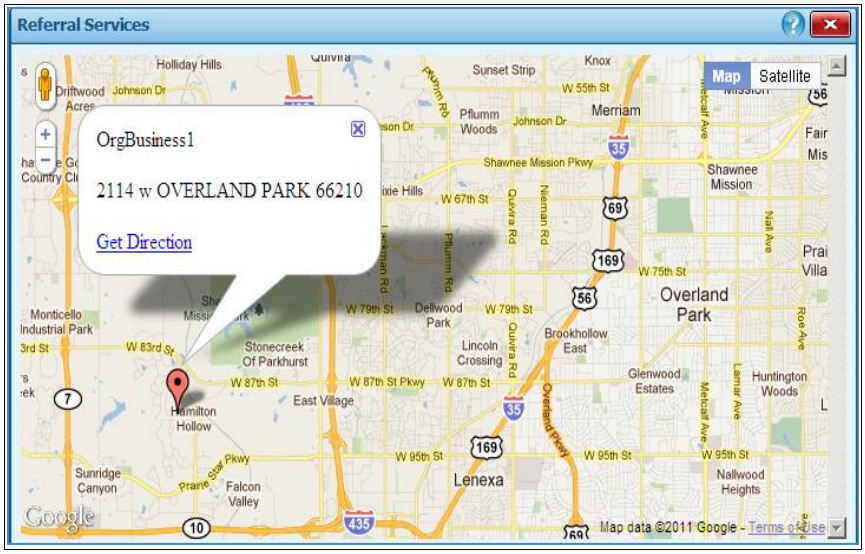
Search Results — Total Items: 8

	Program Name	Provider Name	Contact Person	Provider Address	Miles
☑	Immunization	Central ORG	JOE CONTACT	9102 ANTIOCH ROAD OVERLAND PARK 66210	9.98
☑	SNAP	SNAPOrgBusiness1	DG3 DG3	11901 Metcalf Ave OLATHE 66062	2.13
☐	TANF	TANFOrgBusiness1	DG2 DG2	10721 Roe Ave OVERLAND PARK 66211	0
☐	Low Hemoglobin	LowBloodWorkOrg1	DG3 DG3	11001 Roe Ave OLATHE 66062	0.37
☐	Homeless	HomeLessOrg1	DG2 DG2	11951 Metcalf Ave OVERLAND PARK 66210	2.19
☐	Medicaid	MedicAidOrg1	JOE CONTACT	9102 ANTIOCH ROAD OVERLAND PARK 66210	9.98
☐	School Lunch	SchoolLunchOrg1	DG3 DG3	9102 ANTIOCH ROAD OVERLAND PARK 66210	9.98
☐	MH	MH Organization	DG3 DG3	9102 ANTIOCH ROAD OVERLAND PARK 66210	9.98

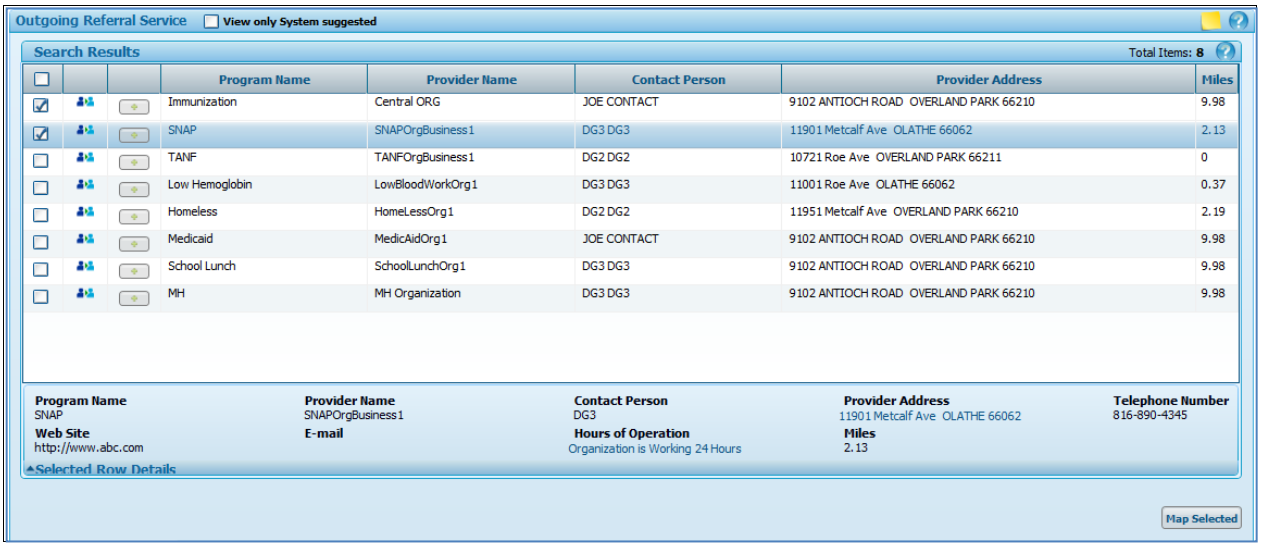
6. To view a map of the selected referral location, click **Map Selected**. The **Referral Services** screen displays.



7. Click on a referral location for more details and /or to print directions to the referral service.



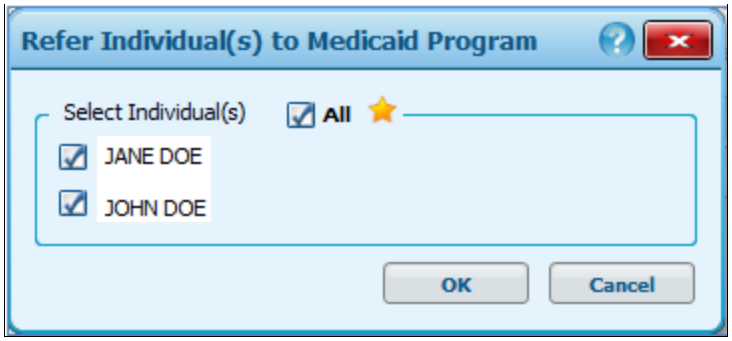
8. With a referral option selected (or highlighted) in the **Search Results** grid, expand the **Selected Row Details** container to view details of the selected referral service.



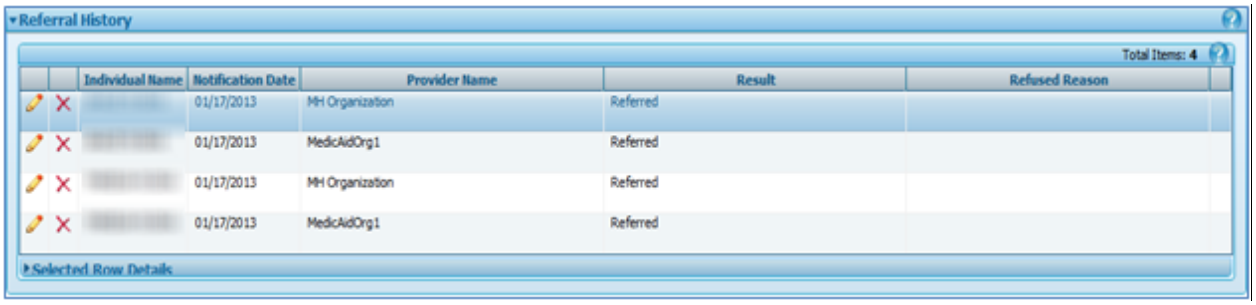
9. To refer one or more members of the family to the selected referral, click the **Refer Individuals to Program** button ( ) next to the desired row. The **Refer Individual(s)** screen displays.

10. Select the participant(s) that apply.

11. Click **OK**. The screen refreshes and the referral displays in the **Referred Individual(s)** grid.



12. Click **Save**. A status message displays indicating success. The referral results display on the **Referral History** grid.



Referrals that have been documented for family members display on the Care Plan Summary screen and the Care Plan Detail screen under the Referrals section.

A referral can also be assigned within the Care Plan Summary by clicking on Referrals within the Family Care Plan section.

Congratulations!

You have successfully completed the **Referral Program** process.

Nutrition Education

Nutrition education covers a variety of topics and is provided through multiple venues such as individual counseling, group classes, online modules or other educational methods. There are two types of nutrition education. The primary type is done at the initial certification and is usually a conversation between staff and participant. This is considered individual nutrition education. The secondary type can include several modes of education and are held during active certification periods such as group education classes. The system will maintain the appointment schedules for participant nutrition education and attendance at the nutrition education sessions or completion of nutrition education modules online. Missed nutrition education will also be tracked. All nutrition education contacts can be tracked at the family or individual level.

This process includes the following task(s):

Task A. Filtering to Select Nutrition Education Topics **7-26**

Task B. Selecting Nutrition Education Topics **7-27**

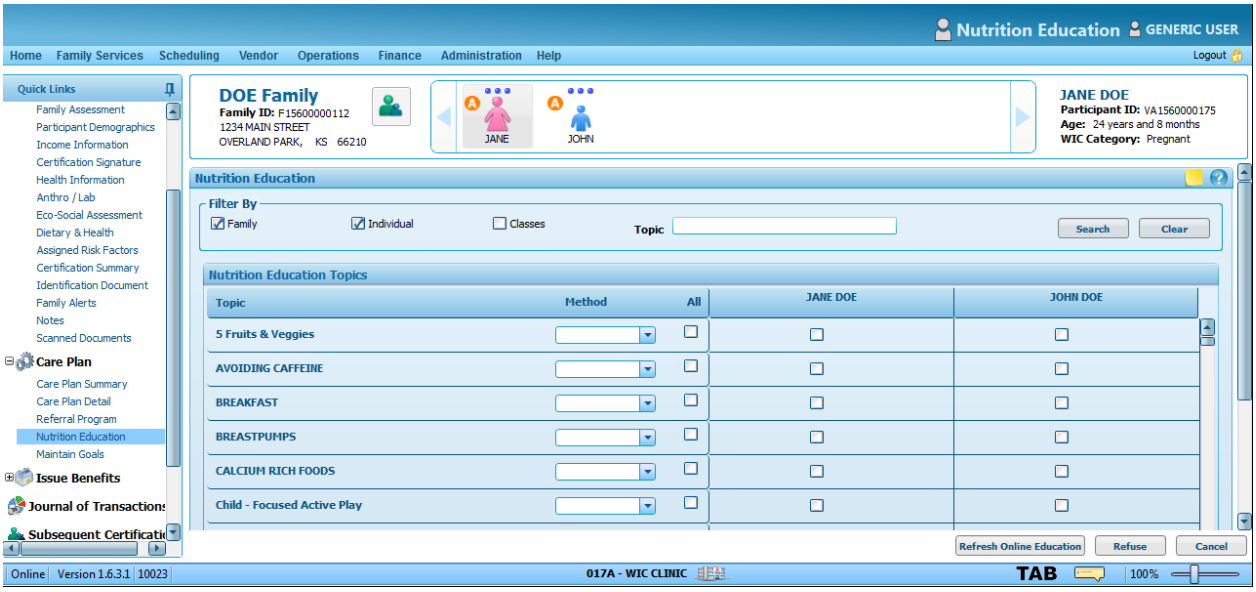
Task C. Documenting a Refusal **7-29**

Task D. Scheduling a Group Nutrition Education Class **7-31**

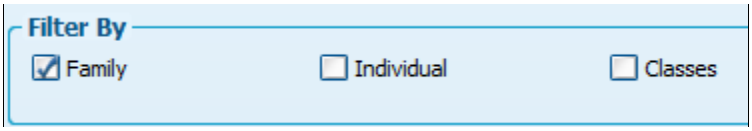
Task A. Filtering to Select Nutrition Education Topics

Complete the following steps to perform this task:

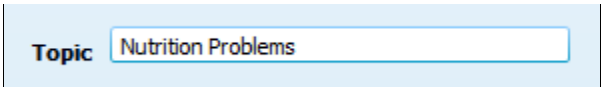
1. Go to the **Quick Links → Care Plan → Nutrition Education**. The **Nutrition Education** screen displays.



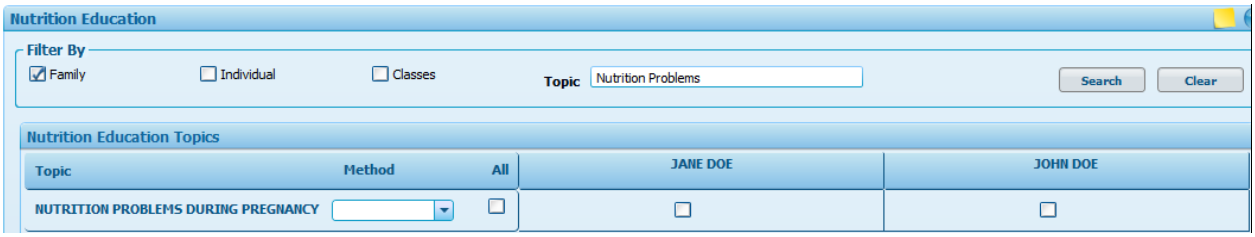
2. In the **Filter By** group box, check the boxes that apply. The screen refreshes and the appropriate **Nutrition Education Topics** display.



3. Enter a **Topic** to filter down to a specific topic.



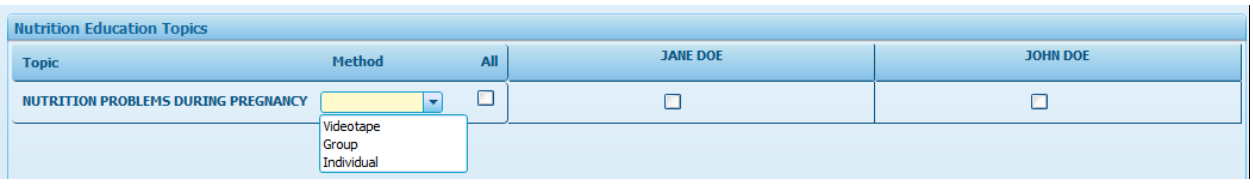
4. Click **Search**. The screen refreshes and the search results display.



Task B. Selecting Nutrition Education Topics

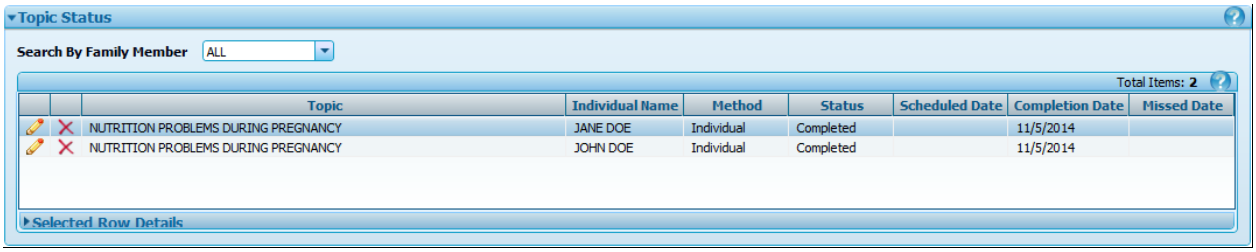
Complete the following steps to perform this task:

1. In the **Nutrition Education Topics**, select the **Method** from the drop down list box for the topic selected.

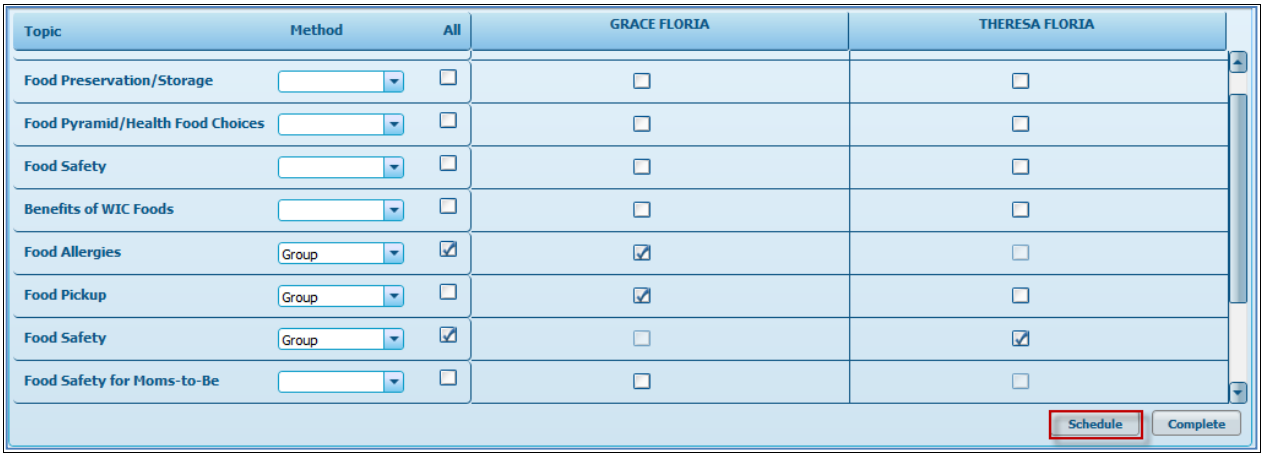


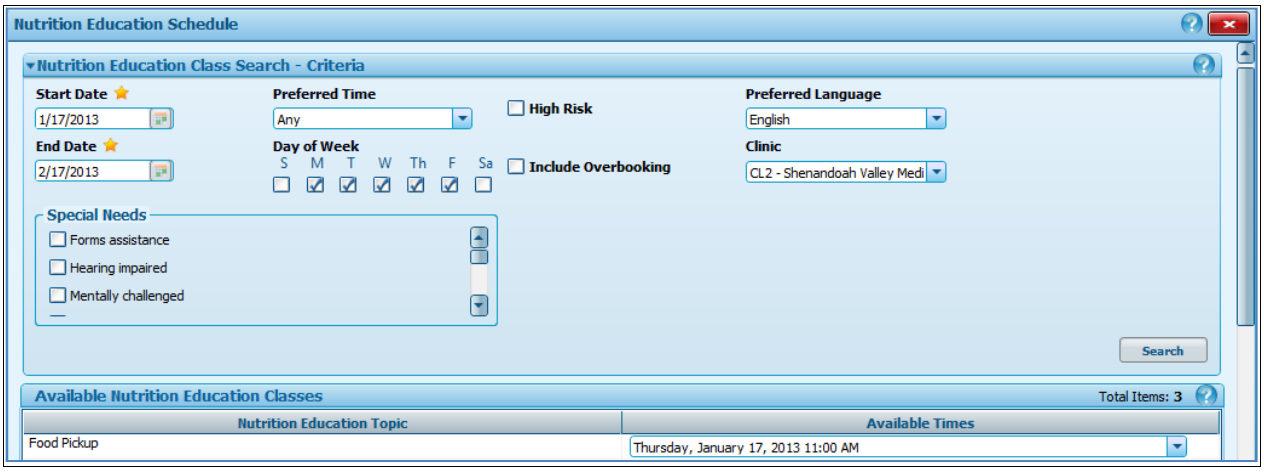
2. Check the **All** box if the topic applies to the family, or select individual checkboxes to assign one or more family member(s) to a topic.

3. Click **Complete**, if the nutrition education was provided and completed the same day. A status message displays indicating success. The screen refreshes and the status displays on the **Topic Status** grid.

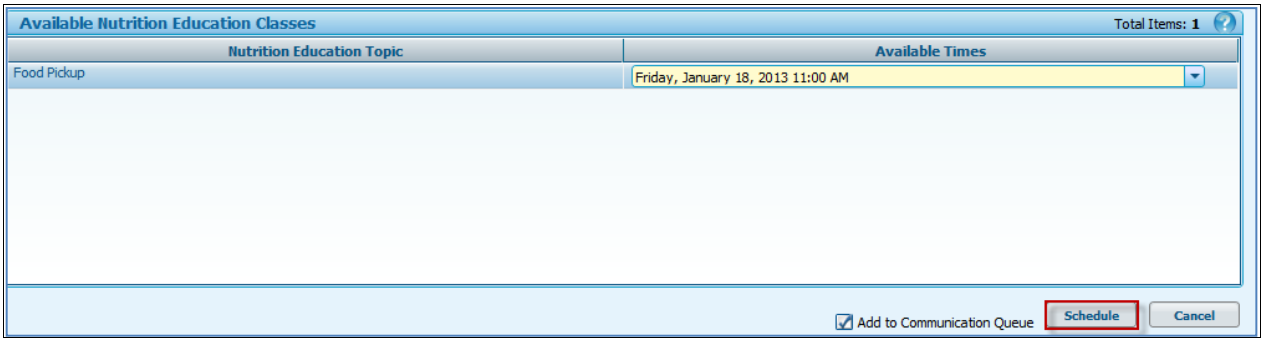


4. Click **Schedule** to register a family member in a class. The **Nutrition Education Schedule** screen displays.



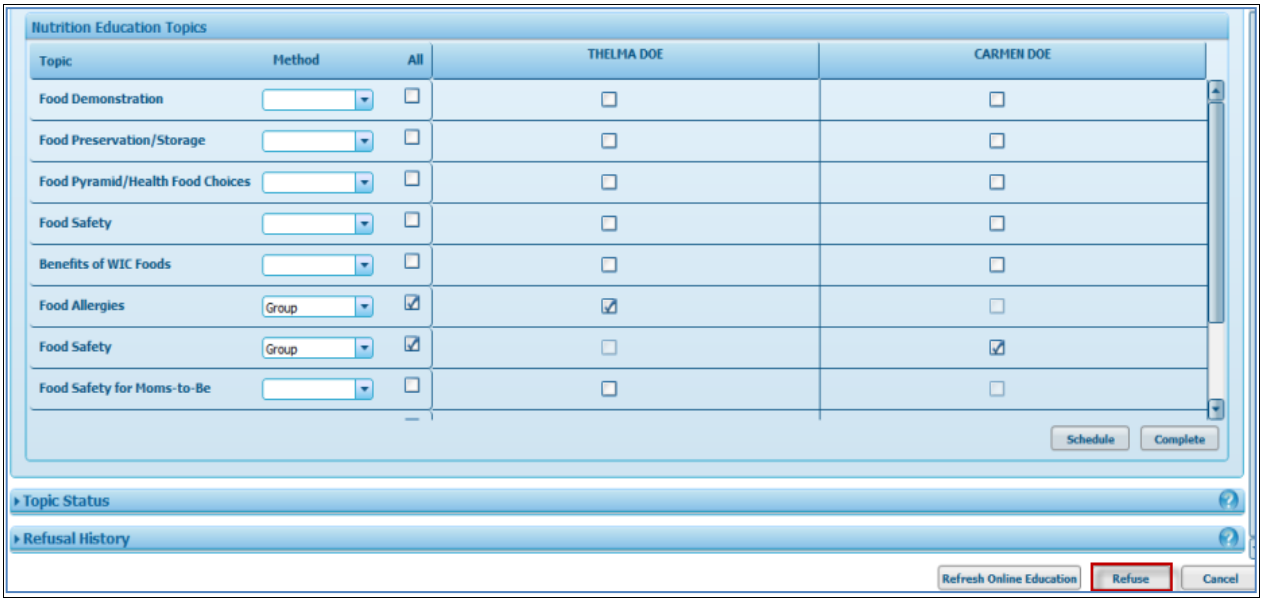


5. Select an available date and time.
6. Click **Schedule**. The screen refreshes and the **Nutrition Education** screen displays.



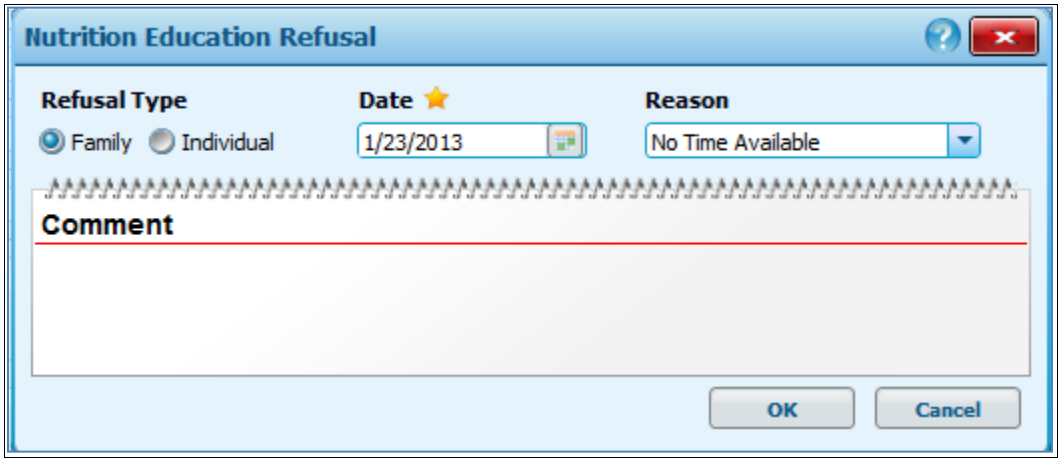
To facilitate the recording of attendance and crediting participants, enrollees must be scheduled in a group class.

Task C. Documenting a Refusal

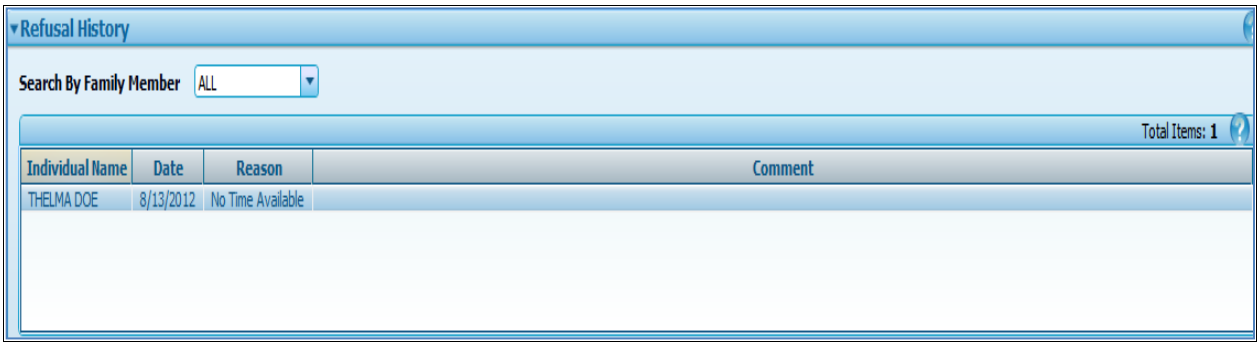


Complete the following steps to perform this task:

1. Click **Refuse** if a family member chooses not to receive nutrition education. The **Nutrition Education Refusal** screen displays.
   a. Select the **Family Refusal Type**.
      i. Select **Date**.
      ii. Select **Reason**.



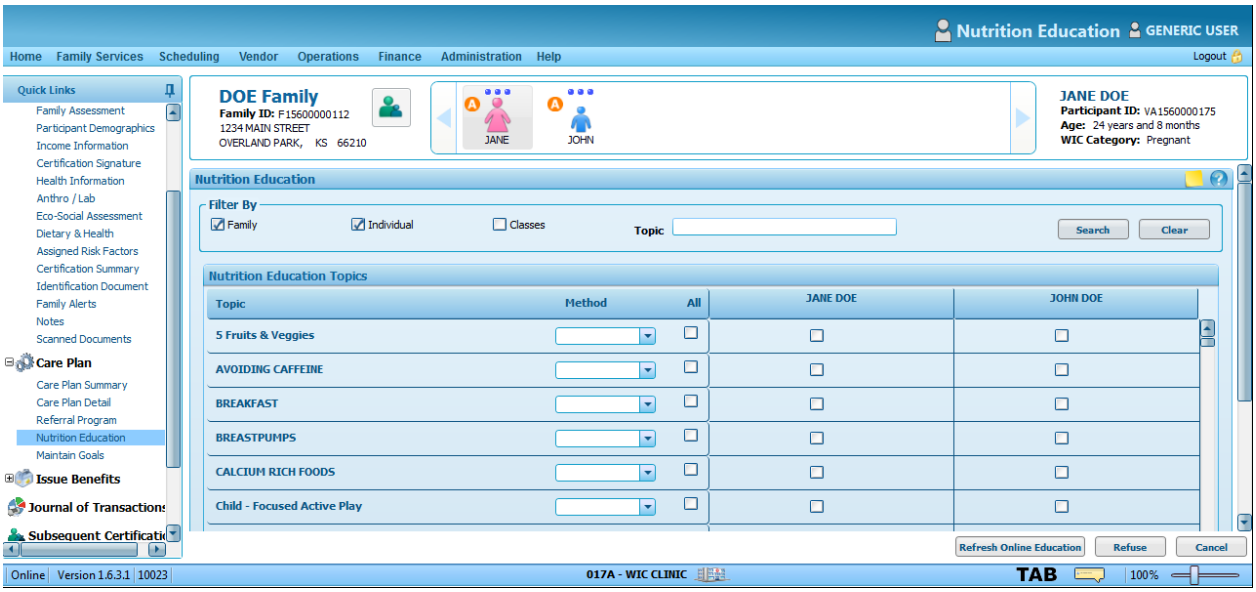
2. Click **OK**. A status message displays that the refusal was saved successfully. The **Nutrition Education** screen refreshes and the **Refusal History** grid displays under the **Nutrition Topics** grid, indicating the family members refusing to take a class.



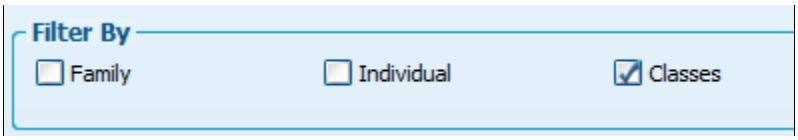
Task D. Scheduling a Group Nutrition Education Class

Complete the following steps to perform this task:

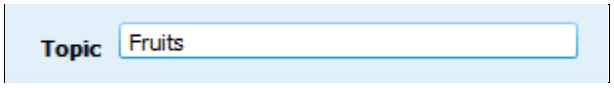
1. Go to the **Quick Links → Care Plan → Nutrition Education**. The **Nutrition Education** screen displays.



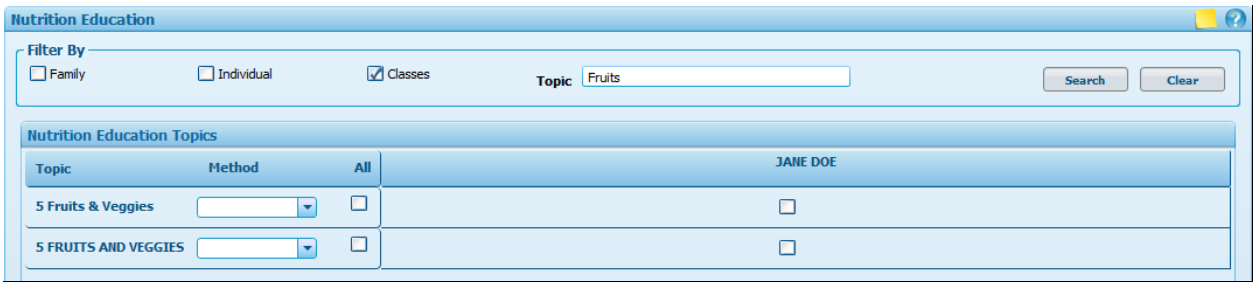
2. In the **Filter By** group box, select the **Class** checkbox and unselect the **Family** and **Individual** checkboxes.



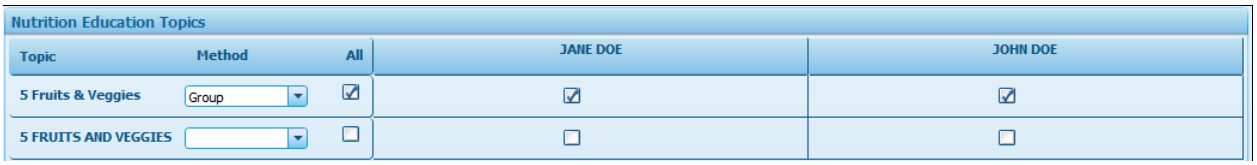
3. Enter the name (or a portion of the name) of the desired group education class.



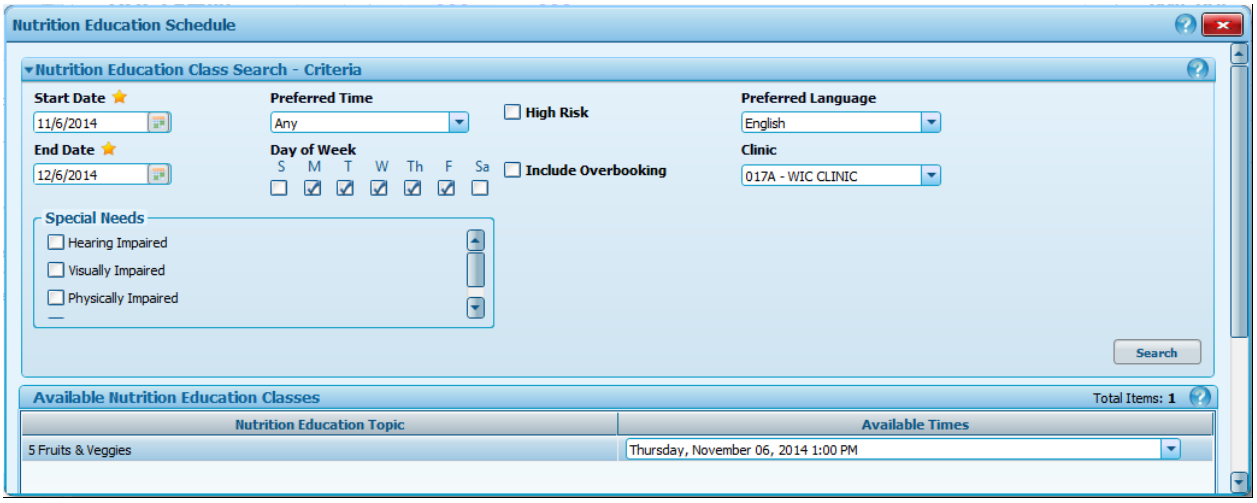
4. Click **Search**. The screen is refreshed and displays the search results.



5. Select a **Method** of Group next to the desired class and select the individuals to schedule for the class.

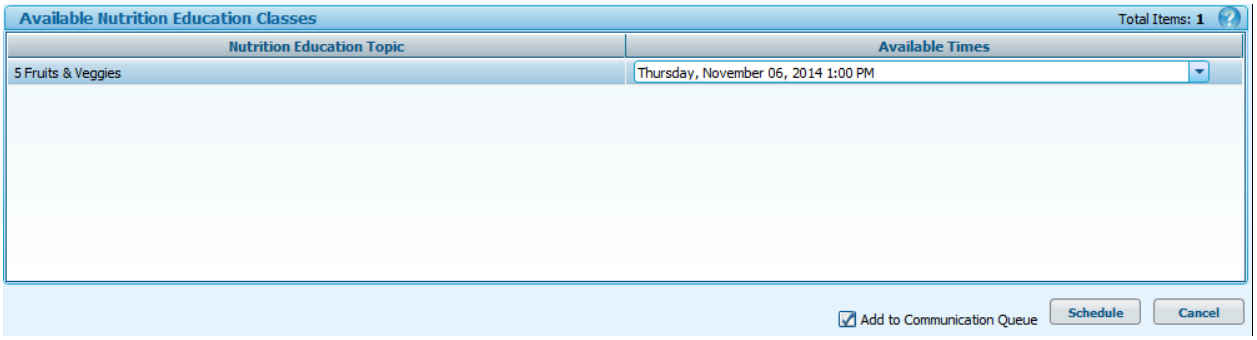


6. Scroll to the bottom of the screen and click **Schedule**. The **Schedule Nutrition Education Class** screen displays listing one or more pre-defined schedule options for the selected group class.

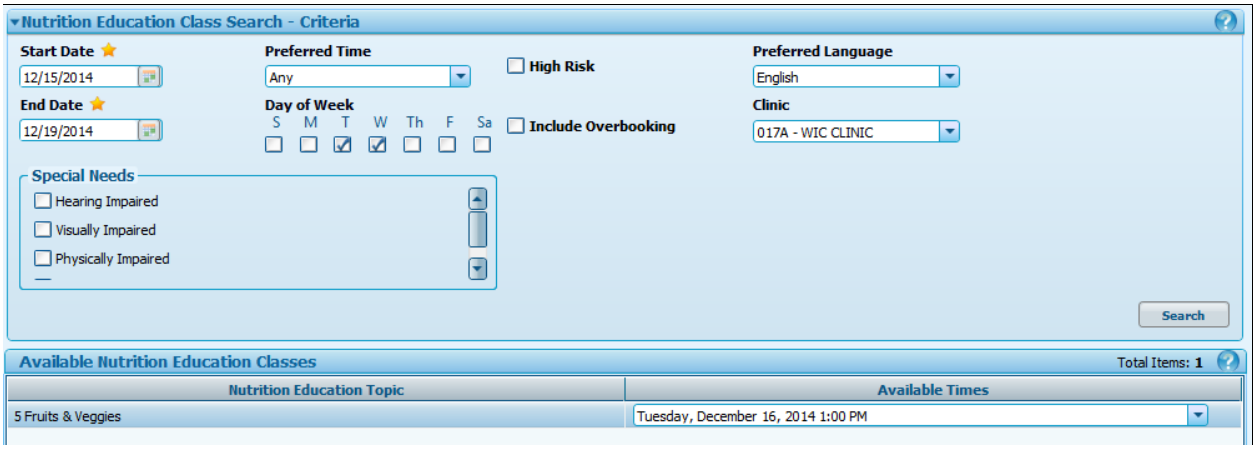


7. Do one of the following:

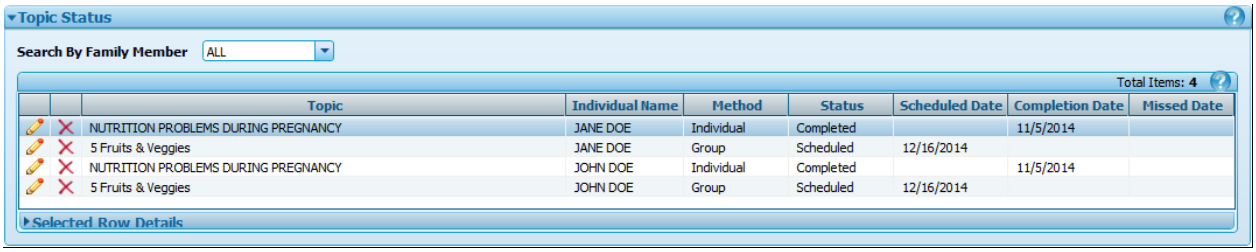
- Accept the pre-defined search option within the **Available Nutrition Education Classes** grid and click **Schedule**. A status message displays indicating success.



- Enter new search criteria (such as a new date range) and click **Search**. A new class option displays. Conduct additional searches as necessary until the desired option is displayed and then click **Schedule**. A status message displays indicating success.



8. View the **Topic Status** grid (near the bottom of the screen). The selected class is listed within the grid and displays a **Status** of Scheduled.



The newly scheduled class displays on several other screens as well including:

The Care Plan Summary screen (Family Care Plan section / Nutrition Education)

The Care Plan Detail screen (under Nutrition Education for the selected individuals)

The Family Appointments screen (under the Family Nutrition Education Class List)

Congratulations!

You have successfully completed the **Nutrition Education** process.

Maintain Goals

The **Maintain Goals** screen enables users to document goals that apply to the entire family and/or goals that apply to individual family members. There are two types of individual goals: system defined goals and free-form goals.

This scenario assumes you have searched and accessed the desired family record.

This process includes the following task(s):

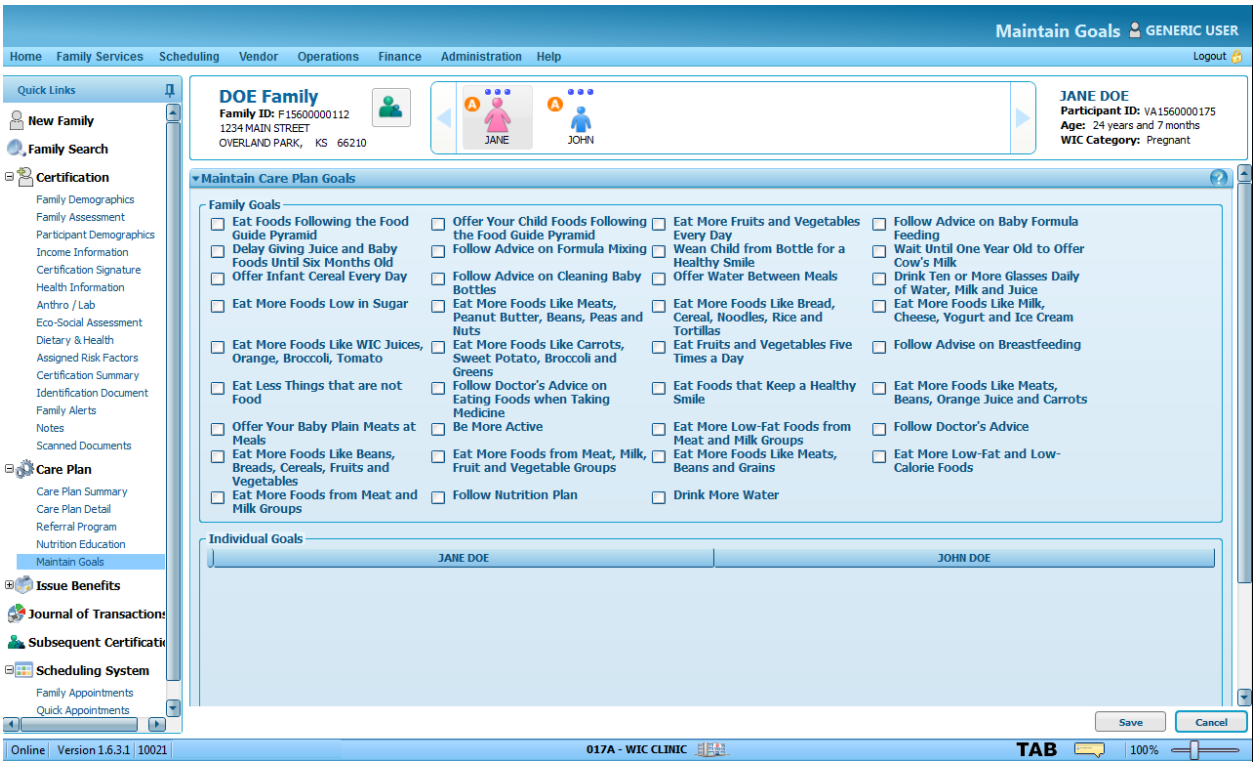
Task A. Documenting Goals **7-35**

Task B. Viewing the Assigned Goals History **7-39**

Task A. Documenting Goals

Complete the following steps to perform this task:

1. Go to **Family Services → Care Plan → Maintain Goals**. The **Maintain Goals** screen displays.



2. Do one or more of the following:

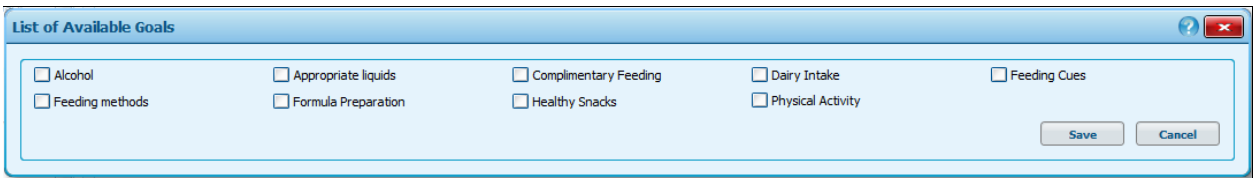
   a. To add family goals:

      i. Select the check boxes that apply to the family within the **Family Goals** group box.

Family goals that are selected apply to every member of the family.

b. To add Individual goals:

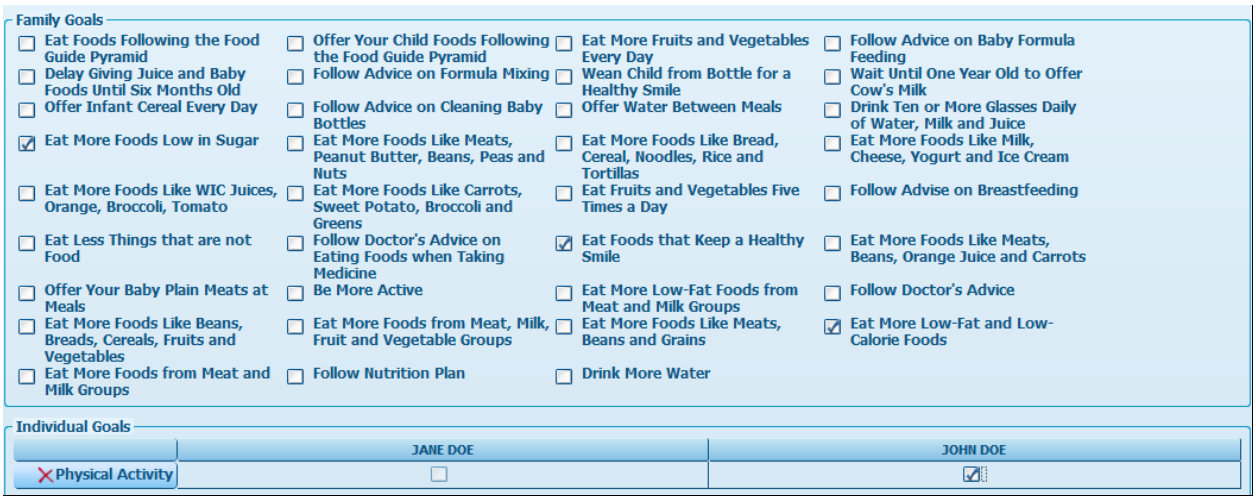
i. Click **Add Goals**. The **List of Available Goals** screen displays.



ii. Select the check boxes that will apply to individual participants. (You will choose which individual members this goal (or these goals) apply to in a later step.)

iii. Click **Save**. You are returned to the **Maintain Goals** screen.

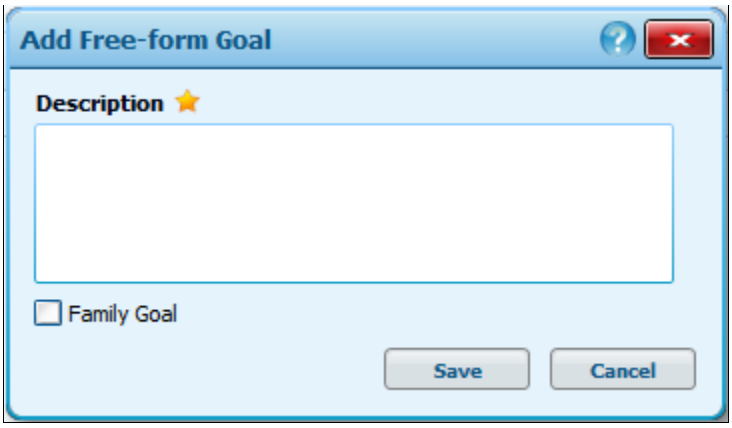
iv. For each goal listed in the **Individual Goals** grid, check each family member to which it applies.



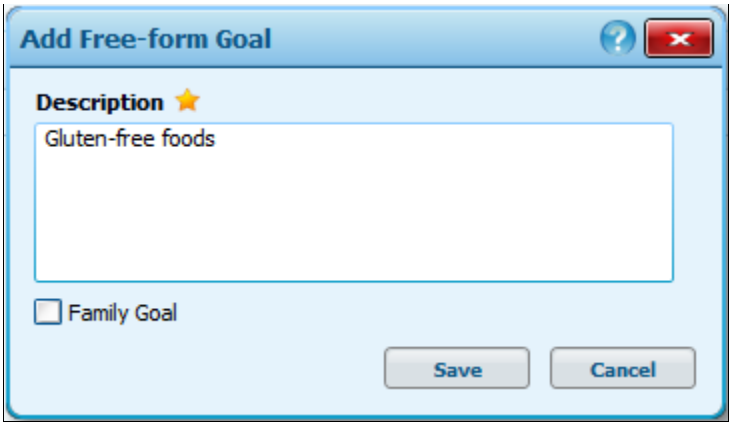
Goals apply to certain WIC categories only as defined by the state during the setup process. In the example above, the individual goal named Physical Activity can be selected for John Doe (Child category), but cannot be selected for Jane Doe (Pregnant category) because the check box is disabled.

c. To add free-form goals:

i. Click **Add Free Form Goal**. The **Add Free Form Goal** screen displays.



ii. Enter the **Description** of a free form goal in **Description**.

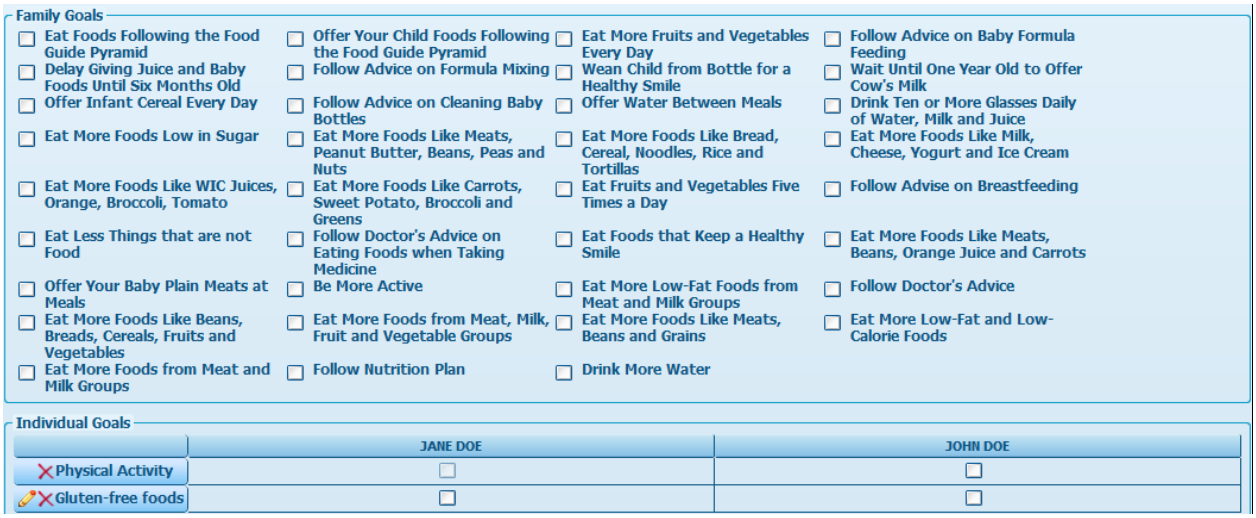


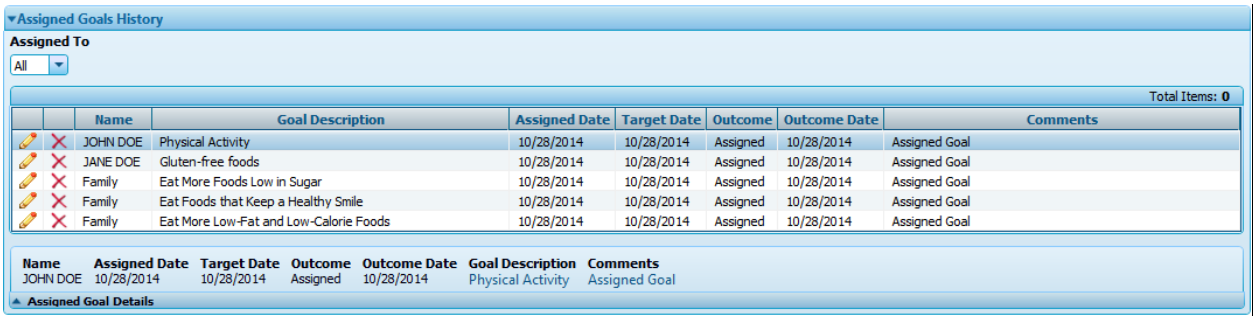
iii. Check the **Family Goal** box if the free-form goal applies to the family record.

iv. Click **Save**. The **Maintain Goals** screen displays.

v. For each free-form goal listed in the **Individual Goals** grid, select each family member to which it applies.

3. Click **Save**. A status message displays indicating success and the **Maintain Goals** is updated.





The check boxes selected within the Family Goals and Individual Goals grids are cleared. Selected family goals and individual goals are added to both the Assigned Goals History grid and to the Care Plan Summary screen (Quick Links → Care Plan → Care Plan Summary).

The Assigned Goals History grid lists member assigned goals. The details of each assigned goal is available by selecting a row in the grid.

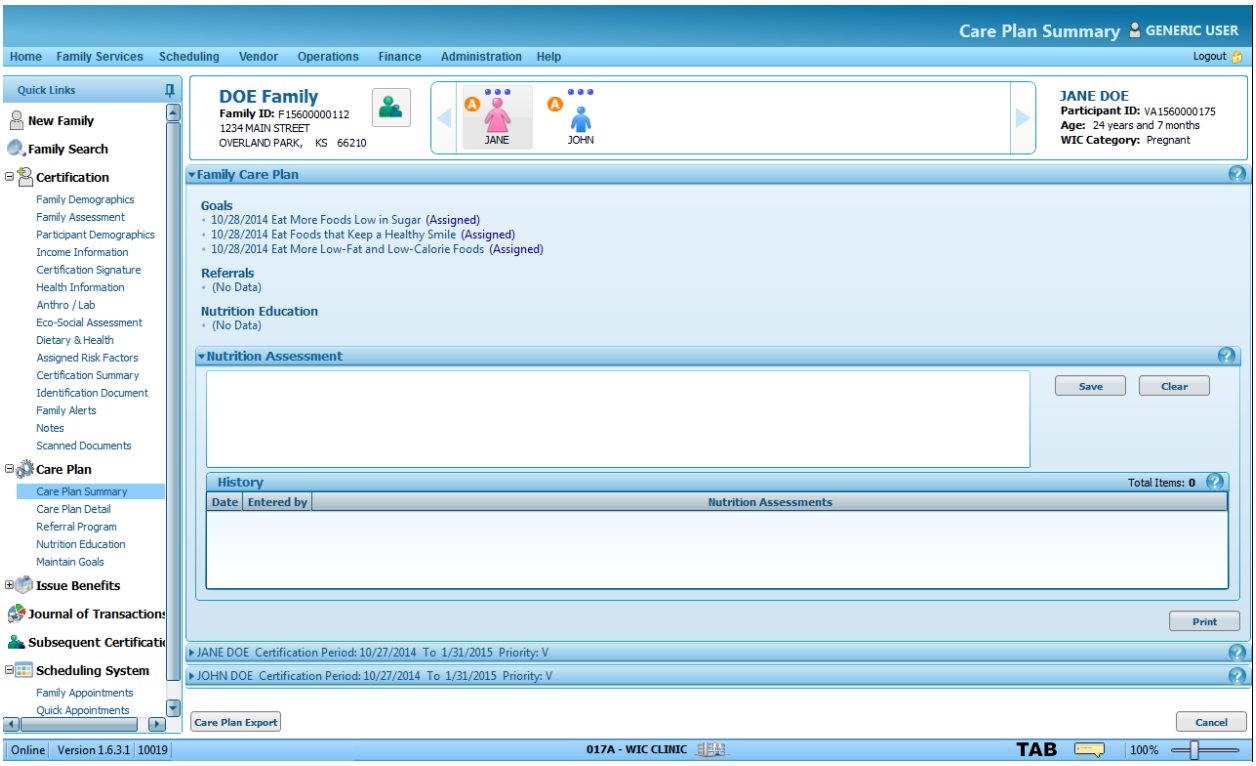
The Care Plan Summary screen displays a collection of information that includes assigned goals, nutrition education, referrals, and progress notes.

Task B. Viewing the Assigned Goals History

The **Assigned Goals History** section allows the user to view and update assigned goals. The **Assigned Goals Detail** section displays the **Name, Goal Description, Assigned Date, Outcome, Target Date, Outcome, Outcome Date** and **Comments**.

Complete the following steps to perform this task:

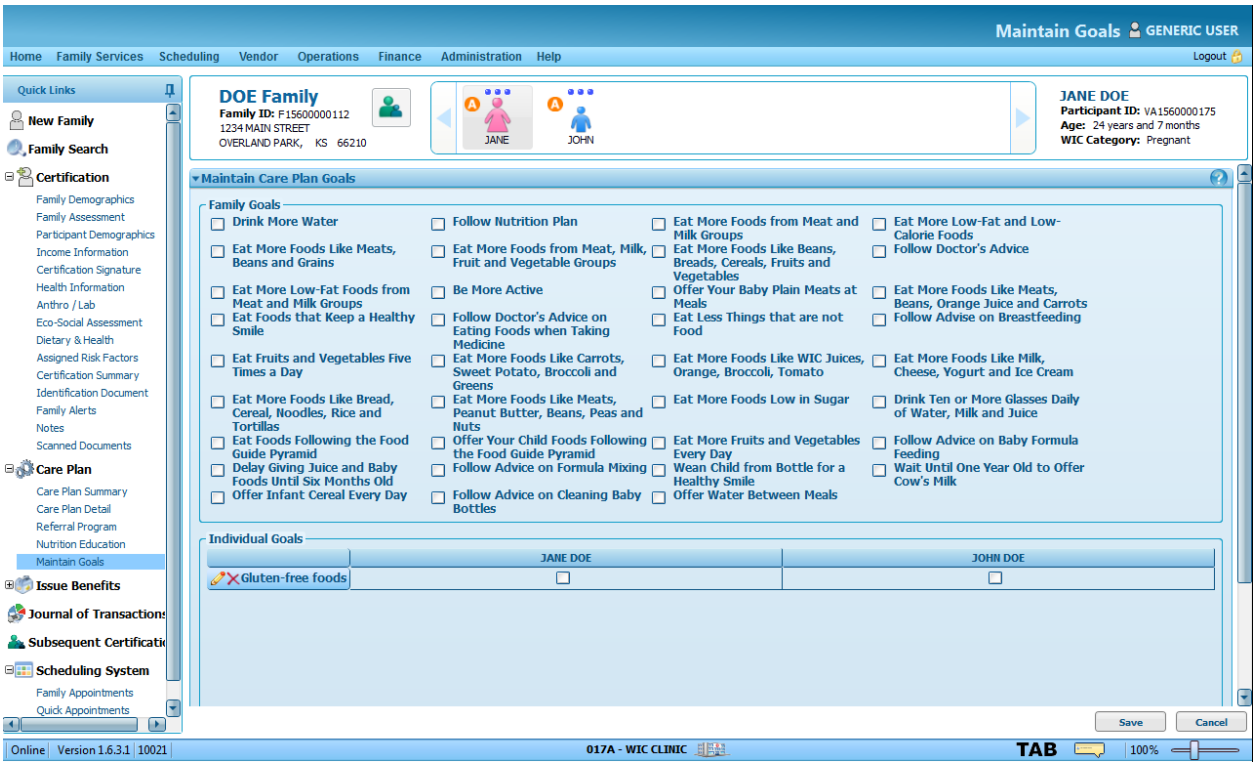
1. Go to **Quick Links → Care Plan → Care Plan Summary**. The **Care Plan Summary** screen displays.



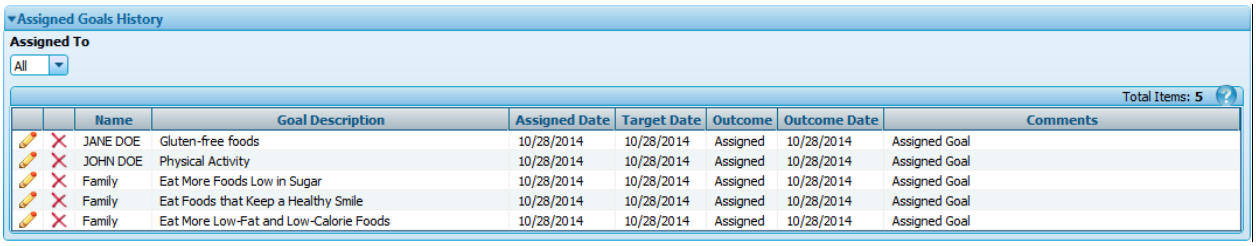
2. To view the **Assigned Goals History**, do the following:

   a. Click on the arrow next to the participant's name to expand the screen.

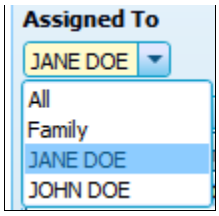
   b. Click on **Goals**. The screen refreshes and the **Maintain Goals** screen displays for additional documentation.

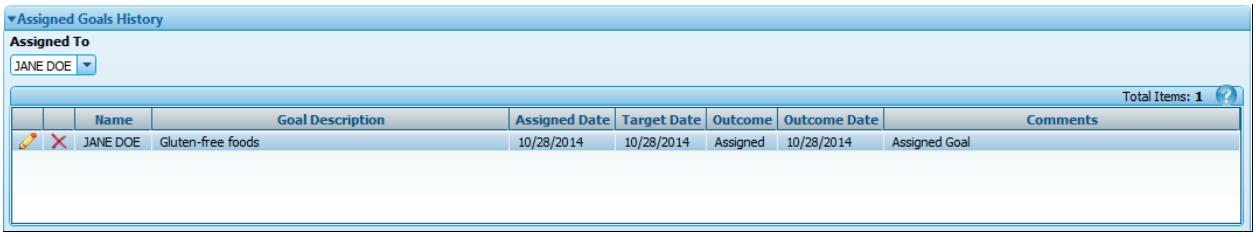


3. Click on **Assigned Goals History** to expand the history grid.



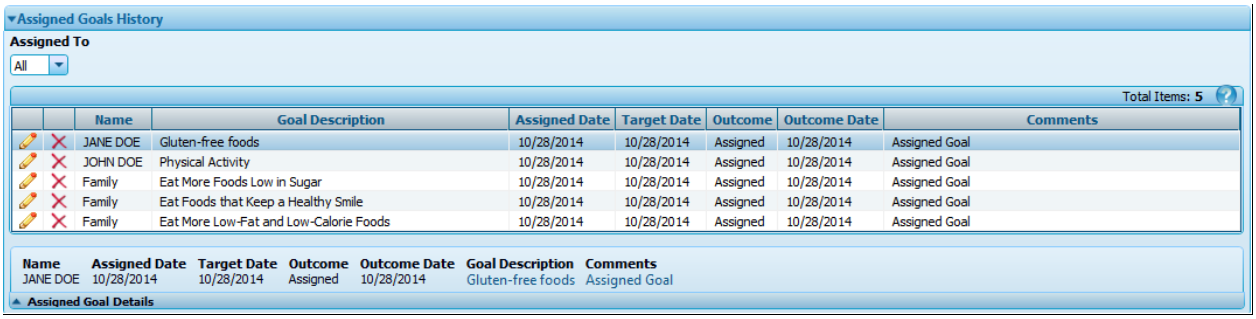
4. Select a member from the **Assigned To** drop-down list box. The screen refreshes and the **Assigned Goals History** displays on the grid.





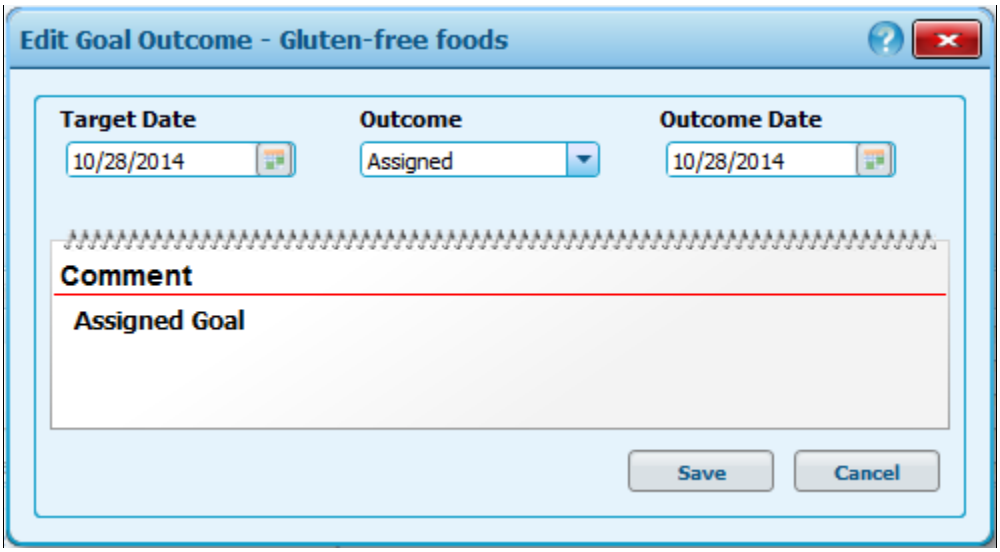
Using the Assigned To drop-down list box, the user can choose to view history with family goals, goals assigned to the selected individual or all goals assigned to the family and individuals.

Selecting All enables you to view the entire family history.

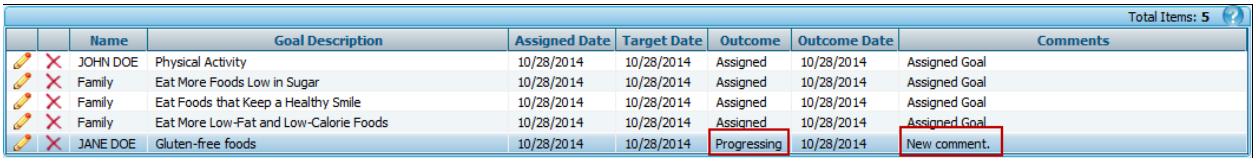


Goals can be edited or deleted.

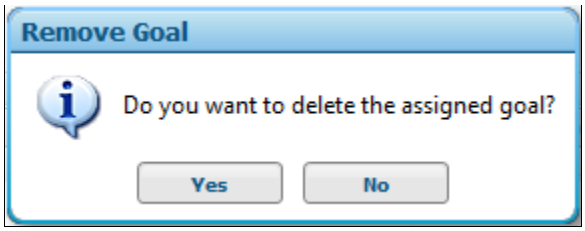
5. Click the **Edit** button ( ) associated with a goal. The **Edit Goal Outcome** screen displays enabling the user to edit certain details of the assigned goal.



6. Once the details of the goal has been edited, click **Save**. The **Assigned Goals History** grid is updated and displays the changes.



7. Click the **Delete** button (✕) associated with the individual goal. The **Remove Goal** popup displays.



8. Click **Yes**. The **Individual Goals** section refreshes and the goal is removed from the grid.

Total Items: 4

		Name	Goal Description	Assigned Date	Target Date	Outcome	Outcome Date	Comments
		Family	Eat More Foods Low in Sugar	10/28/2014	10/28/2014	Assigned	10/28/2014	Assigned Goal
		Family	Eat Foods that Keep a Healthy Smile	10/28/2014	10/28/2014	Assigned	10/28/2014	Assigned Goal
		Family	Eat More Low-Fat and Low-Calorie Foods	10/28/2014	10/28/2014	Assigned	10/28/2014	Assigned Goal
		JANE DOE	Gluten-free foods	10/28/2014	10/28/2014	Progressing	10/28/2014	New comment.

Congratulations!

You have successfully completed the **Maintain Goals** process.

THIS PAGE INTENTIONALLY LEFT BLANK

8- ISSUE BENEFITS

Prescribe Food: Adding and/or Modifying Food Prescriptions for a Woman or a Child

This scenario describes the process of prescribing food for woman and children. The process is different for prescribing formula to infants, which is described in the next scenario. This scenario will describe the process for a non-breastfeeding woman, but can also be applied to pregnant and breastfeeding women and children. The process of assigning, modifying and adding food items is the same for women and for children, although the food packages will be different. The **Prescribe Food** screen is used to enter food prescriptions for each eligible family member. The screen also allows the user to set the family issuance day and the family issuance frequency.

It is assumed that you have logged on and searched for and selected your family. Since it is necessary that participants be certified before they can have food prescribed, it is assumed that all participants in this family have been certified.

The **Prescribe Foods** screen is used to enter food prescriptions for each eligible family member. It is necessary to select each family member to assign a prescription, even if no changes are made.

The **Food Prescription** container is used to create a new food prescription, modify an existing food prescription, review previous food prescriptions, and set the family issuance date and the issuance frequency. Crossroads supports a different food prescription for each benefits month, if entered, and issues the food prescription for the selected benefits month.

The **Food Prescription Carousel** located in the **Food Prescription** container displays a button for each of the selected family member's food prescriptions. Each button includes the effective date of the food prescription at the top. For infant and child food prescriptions, each button also includes the age category to which the food prescription applies at the bottom. For women, each button includes a letter to indicate the WIC category for which the food prescription applies: "P" for pregnant, "B" for breastfeeding, and "N" for non-breastfeeding. Clicking a button displays the details for the selected food prescription in the fields below the carousel and in the **Food Prescription Items** data

The value of the **Food Prescription Date** field is the prescription's effective date. By default, the value of the **Food Prescription Date** field is the current date. For infants and children, the future food prescription dates are preloaded for the food classifications.

A food prescription can be entered and modified for the current date and future dates. Once created, the value of the **Food Prescription Date** cannot be modified, and the food prescription cannot be deleted. The user can view previous food prescriptions using the food prescription carousel.

The **Select the New Food Prescription Date** popup is used to create a new food prescription. Only one food prescription is allowed for the same prescription date for the food classification (WIC category and age).

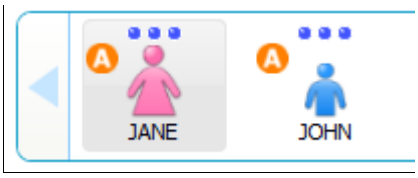
This process includes the following task(s):

Task A. Creating New Food Prescription, Issuance Date, or Frequency 8-2
Task B. Modifying Food Prescription Items 8-6
Task C. Adding Food Prescription Items 8-7

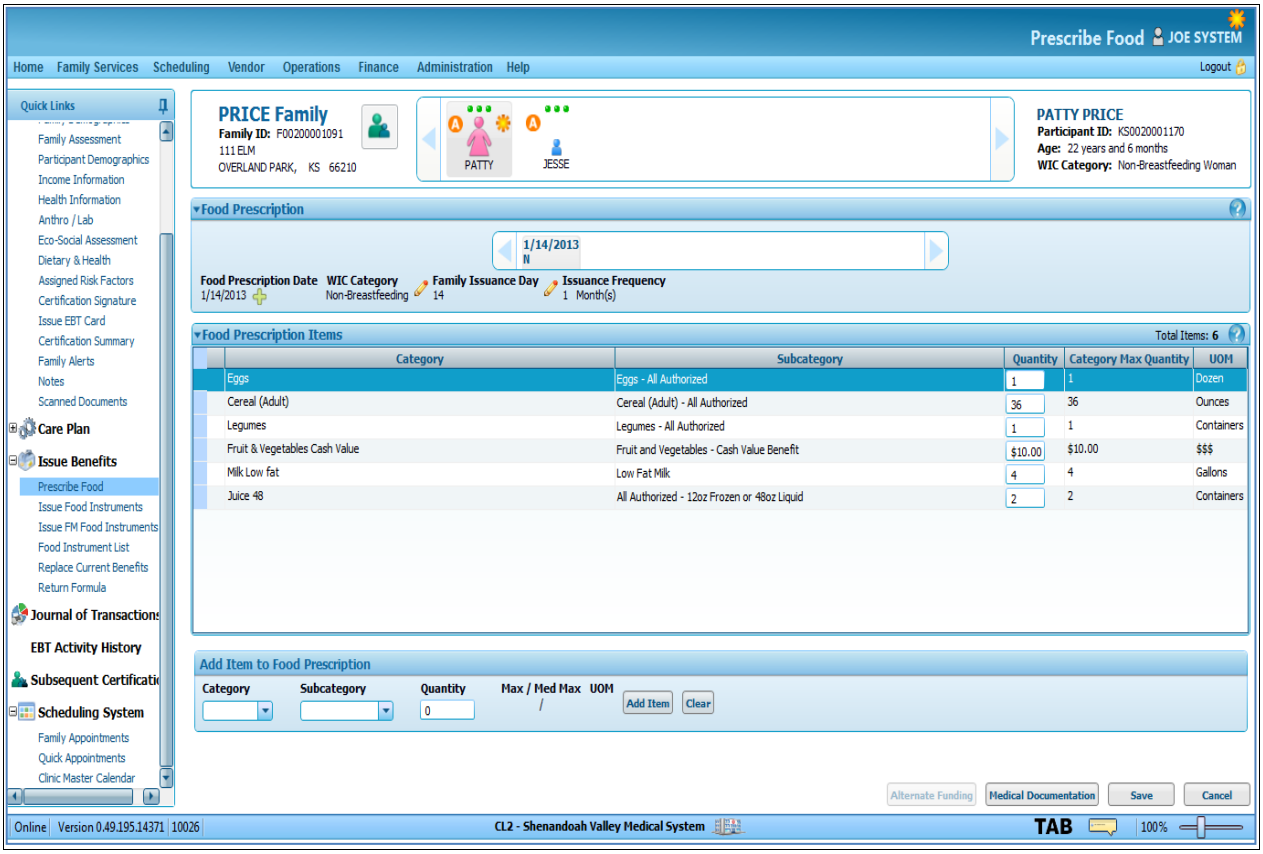
Task A. Creating New Food Prescription, Issuance Date, or Frequency

Complete the following steps to perform this task:

1. Select the woman participant who is ready for a food prescription.



2. Go to **Quick Links → Issue Benefits → Prescribe Food**. The **Prescribe Food** screen displays.



When you navigate to the Prescribe Food screen, the system analyzes the information for the participant to determine if there is a current prescription for the category. A Non-breastfeeding woman with no current prescription is used in this example. The screen defaults a prescription, as shown above. Each time you visit the Prescribe Food screen, the system examines the current record and determines, whether the current prescription is appropriate.

Food Prescription Items — Total Items: 6

Category	Subcategory	Quantity	Category Max Quantity	UOM
Eggs	Eggs - All Authorized	1	1	Dozen
Cereal (Adult)	Cereal (Adult) - All Authorized	36	36	Ounces
Legumes	Legumes - All Authorized	1	1	Containers
Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Benefit	$10.00	$10.00	$$$
Milk Low fat	Low Fat Milk	4	4	Gallons
Juice 48	All Authorized - 12oz Frozen or 48oz Liquid	2	2	Containers

This prescription is a Default package for a Non-Breastfeeding woman. The application provides a default food prescription determined by WIC category, age, breastfeeding status, multiple fetuses or multiple breastfeeding status, based on regulations for each of the 7 basic food packages.

Under **Food Prescription**, examine the **Food Prescription Date**, **Family Issuance Day**, and **Issuance Frequency**. If the default items are appropriate, proceed to the next step to customize the food prescription items.

3. To modify the items in the **Food Prescription** box, do one or more of these changes:

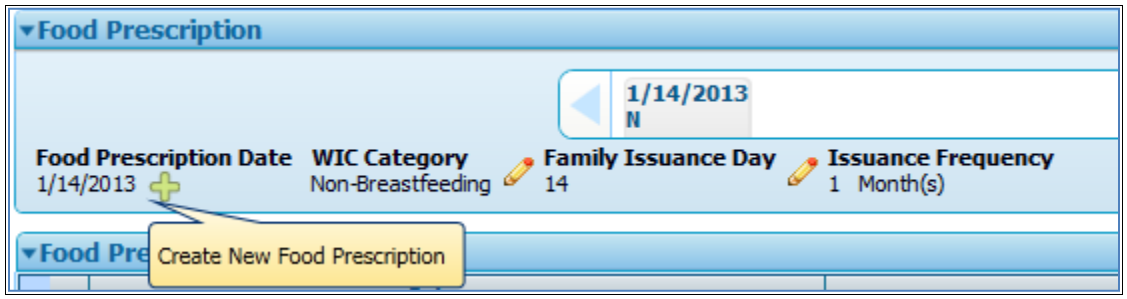
   a. To Create a new food prescription date, do the following:

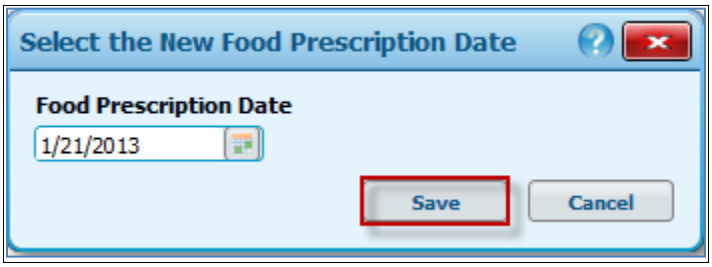
      i. Click the **Create New Food Prescription Add** button (+) under **Food Prescription Date**. The **Select** the **New Food Prescription Date** screen displays.

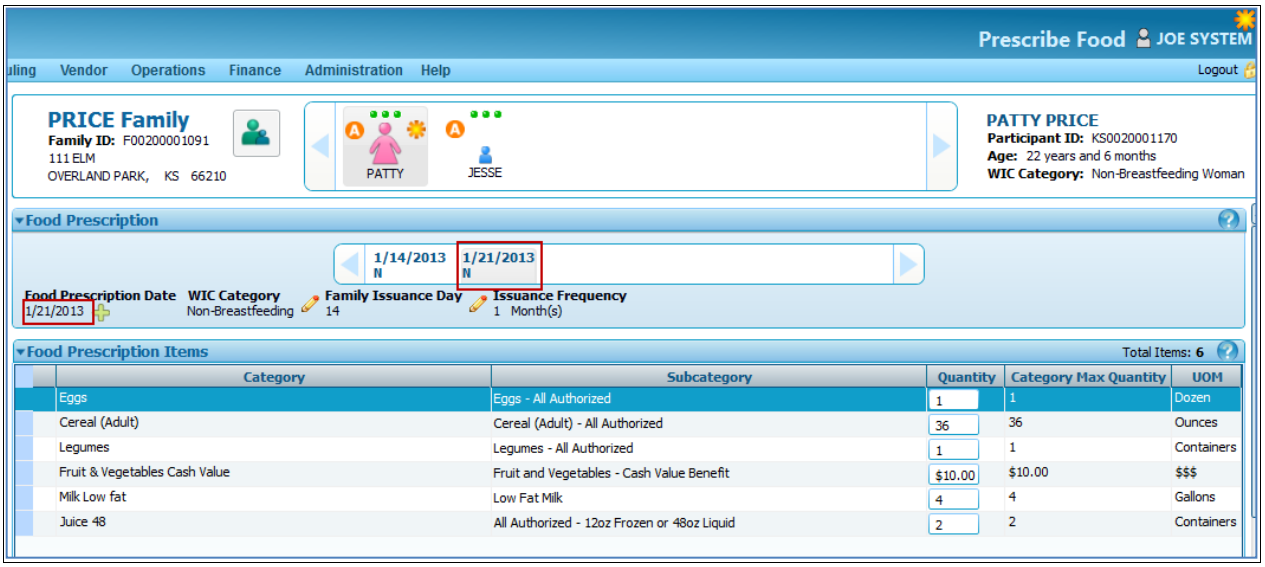
      ii. Select the date for the new food prescription by adding it in the date field or click on the calendar and select the correct date for the prescription to begin.

      iii. Click **Save**. The new food prescription displays in the **Food Prescription** panel.

The Food Prescription Date is the beginning date for the food prescription. For an initial certification, the system provides a default prescription with today's date. The date may be today's date or a future date.



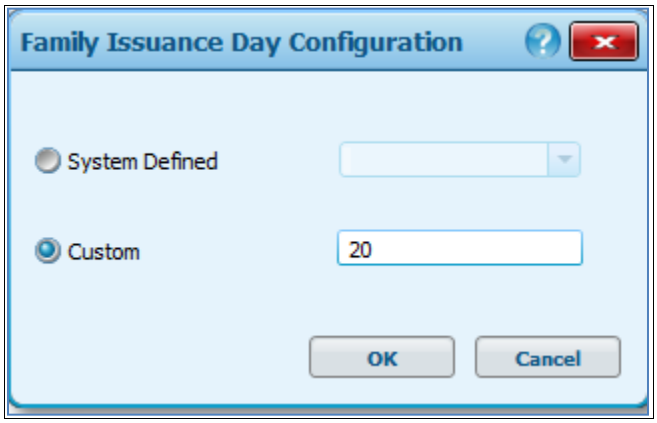




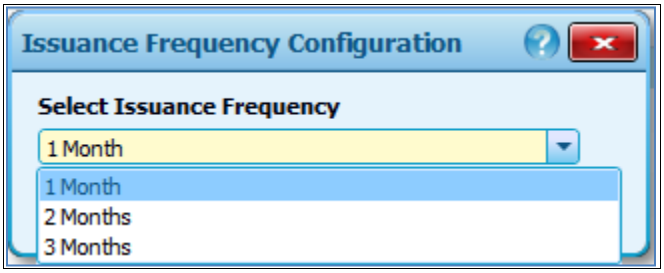
b. To modify the **Family Issuance Date**, click on the **Edit** button ( ) located on the left.

c. Click on **System Defined** to change to a day of another family member, or click on **Custom** to enter a new **Issuance Day** of the month (15, 20, etc.). The new day is assigned to the family, not individual participants.

The Family Issuance Date defaults to the day of the month the family was initially certified. This date determines the first day of the month (First Day To Use) that issued benefits may be used for that month. This date may be modified. If it is modified during a period when a family is receiving benefits, it is likely to result in some family members having benefits prorated for the first month the changed date is in effect. A new infant added to a family will synchronize up to the family issuance date.



d. To modify the **Issuance Frequency Configuration**, click on the **Edit** button ( ) and select a new frequency from the drop down list box.

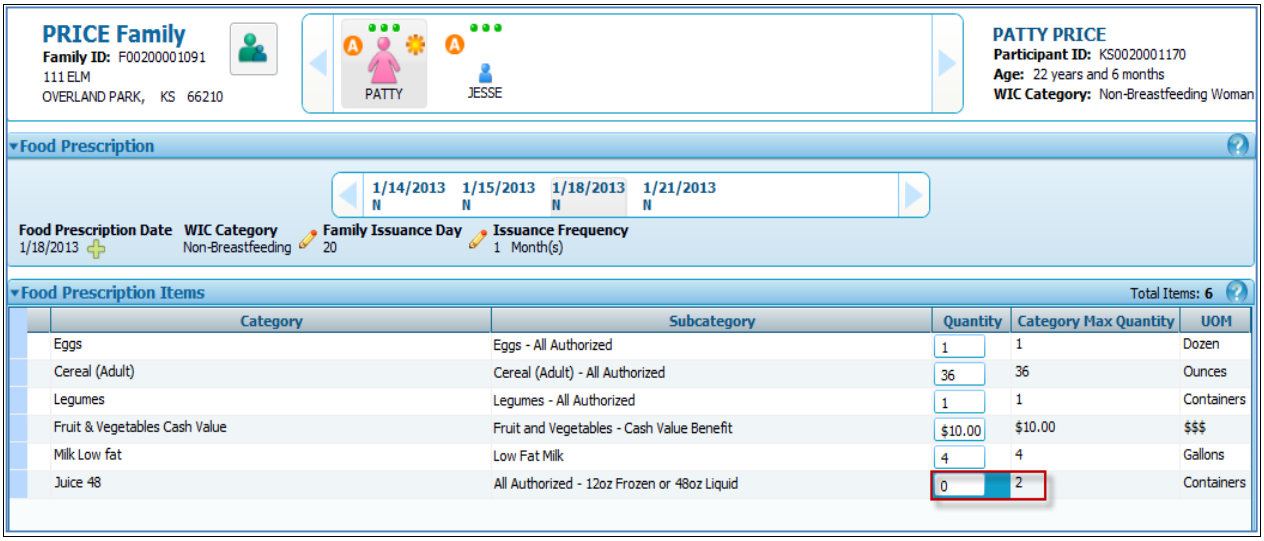


The Issuance Frequency determines how many months of benefits a family will receive when benefits are issued. The maximum period is three months.

Task B. Modifying Food Prescription Items

Complete the following steps to perform this task:

1. Review the default system generated food items and quantity (based on the WIC category and breastfeeding status in the **Food Prescription Items** box).
2. To modify the item quantity displayed in the **Food Prescription** box, click on the **Quantity** field and replace the original with the appropriate quantity value.



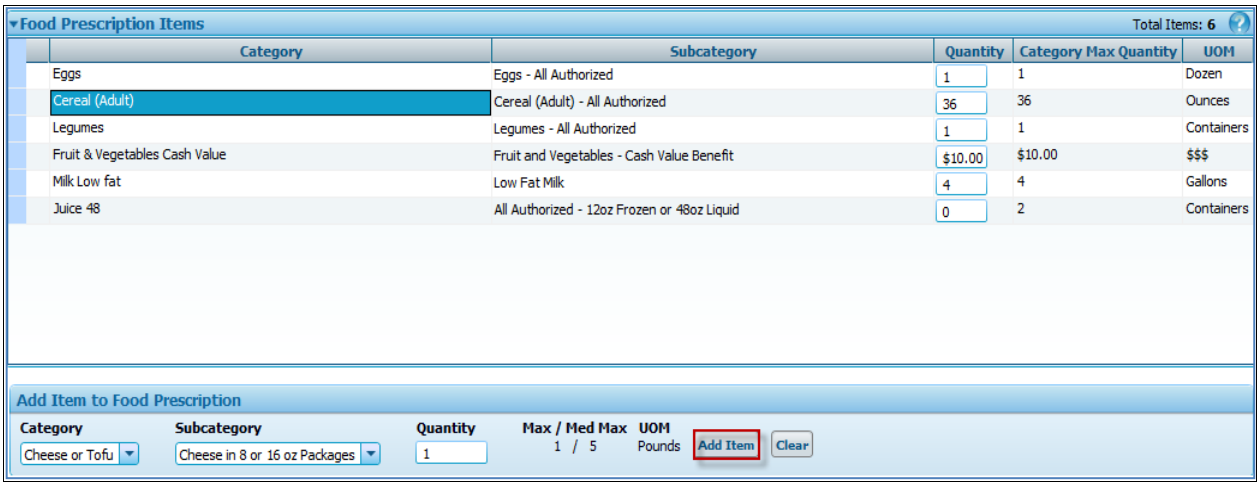
The Category Maximum Quantity cannot be exceeded.

Since an item cannot be deleted from the prescription, simply set the quantity to "0" when a food item is not to be used.

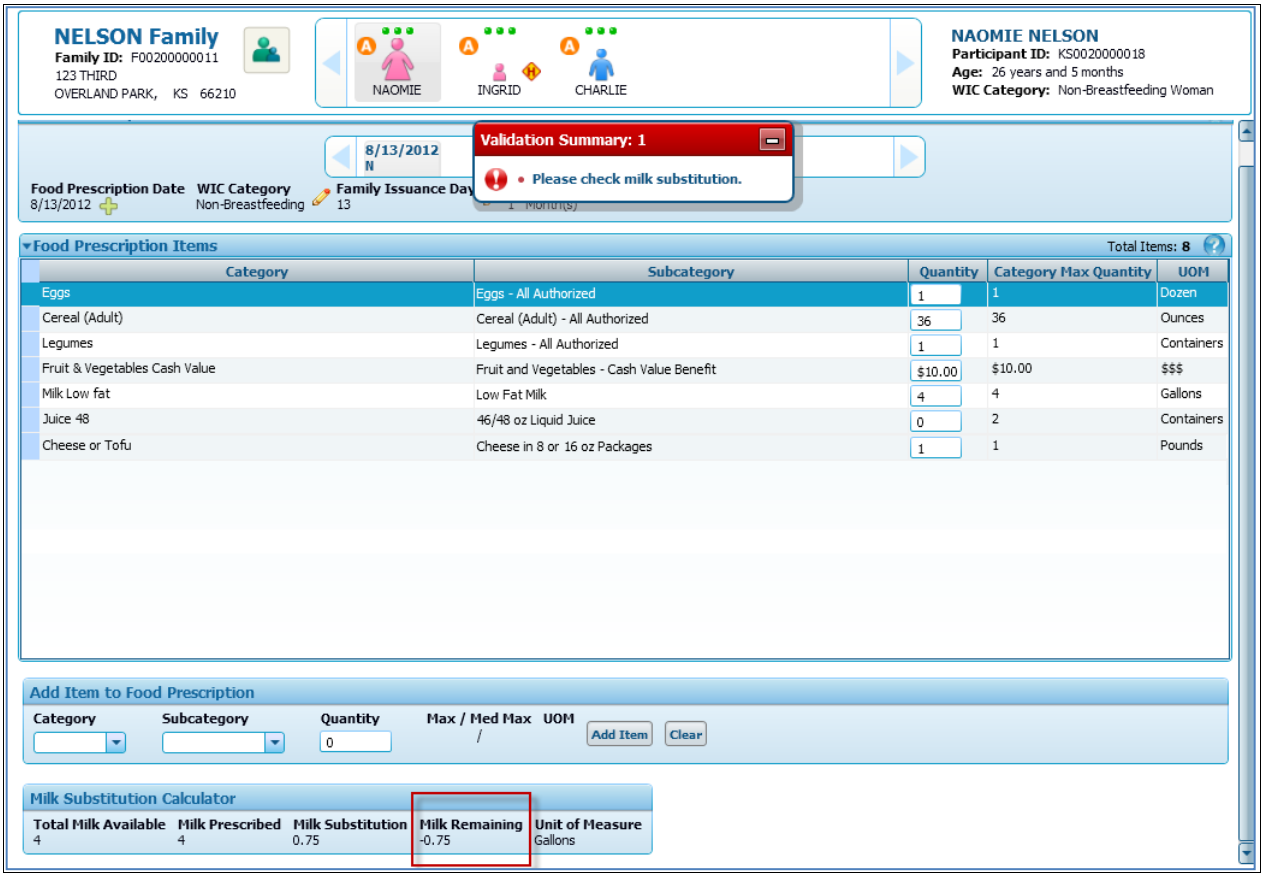
Task C. Adding Food Prescription Items

Complete the following steps to perform this task:

1. Under **Add Item to Food Prescription**, select an item from the **Category** and **Subcategory** drop down list box to add another item to the prescription.
2. Enter **Quantity**. The quantity cannot be more than the maximum without medical documentation.



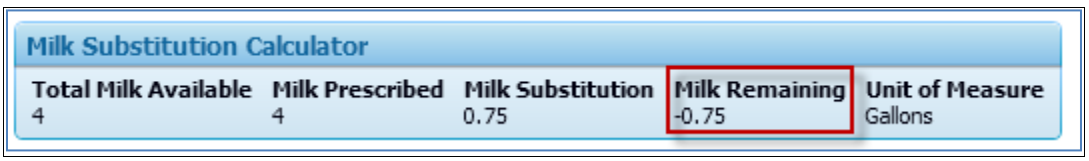
3. Click **Add Item**. The screen refreshes and the newly added food item displays within the **Food Prescription** grid.

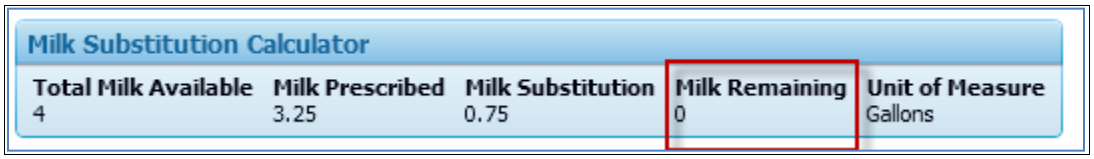


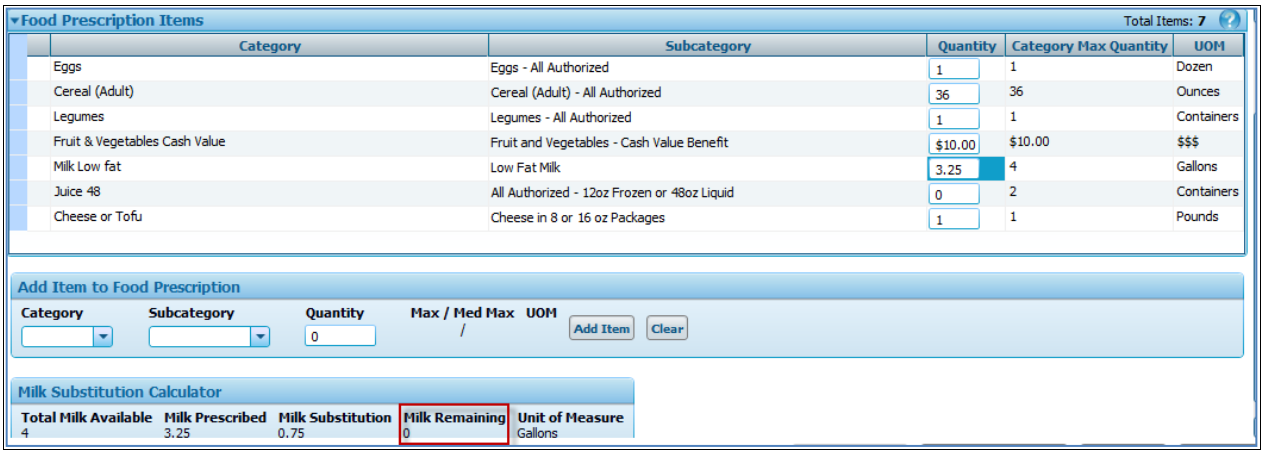
The example above illustrates cheese being added to the prescription of a Non-Breastfeeding Woman. One pound of cheese can be added without Medical Documentation. Since cheese will be substituted for milk, the Milk Substitution Calculator displays when cheese is added. A Validation message shows that milk quantity must be reduced.

4. Adjust the milk **Quantity** on the **Food Prescription** grid to allow for the substitution of cheese.

In this case, cheese is being substituted. One pound (1lb) of cheese is equivalent to .75 units of milk. The Validation Summary warns that the milk substitution indicates the milk must be reduced by .75 gallons. When reduced to 3.25, as shown below the Error message disappears and the package may be saved. By reducing the total milk from 4 to 3.25 gallons, the food prescription will allow the substitution of 3 quarts milk for 1 pound of cheese.

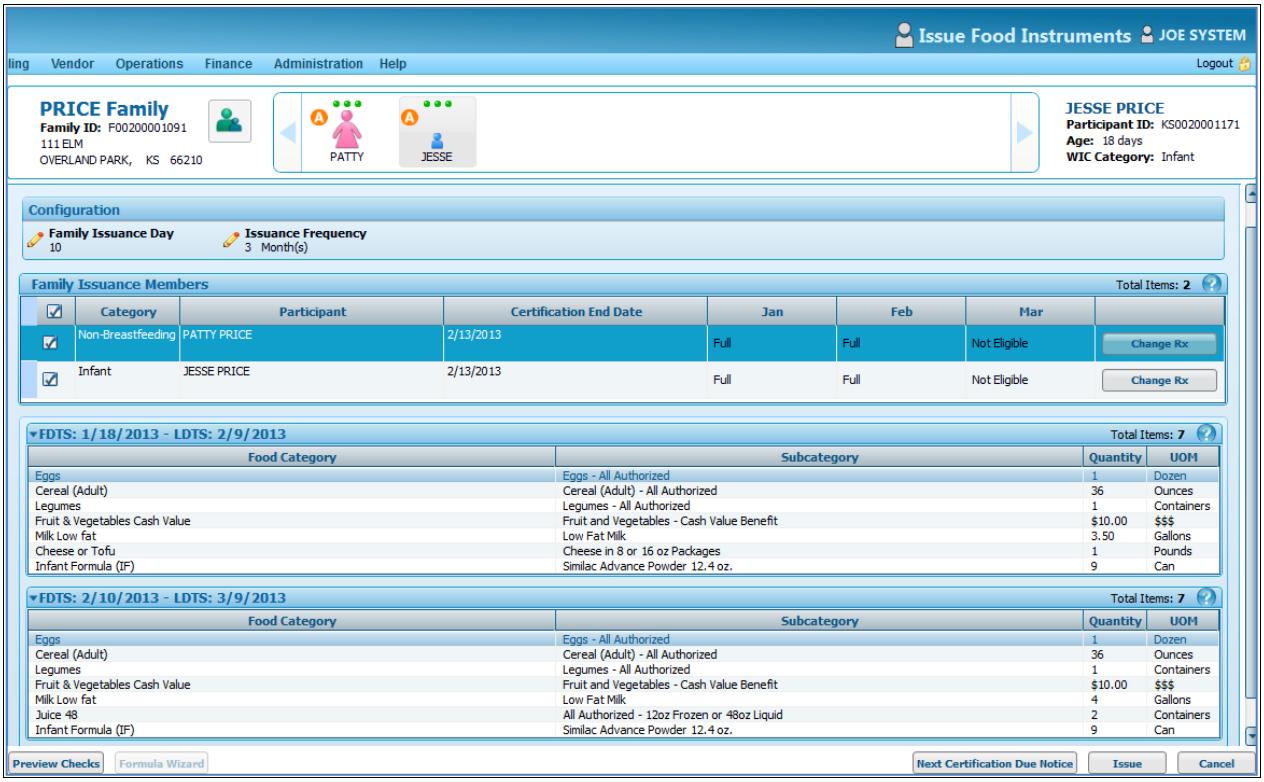






Cheese may be substituted for milk without Medical documentation for certain food packages only. If necessary, obtain Medical documentation prior to substitution.

5. Click **Save** to assign the new prescription. A status message indicates the prescription is added and the **Issue Food Instruments** screen displays.



Issue Food Instruments Frank Rizzo

uling Vendor Operations Finance Administration Help Logout

NELSON Family
Family ID: F00200000011
123 THIRD
OVERLAND PARK, KS 66210

NAOMIE INGRID CHARLIE

NAOMIE NELSON
Participant ID: KS0020000018
Age: 26 years and 5 months
WIC Category: Non-Breastfeeding Woman

Issue Food Instruments

Configuration
Family Issuance Day 13
Issuance Frequency 1 Month(s)

Family Issuance Members Total Items: 3

	Category	Participant	Certification End Date	Aug	Sep	Oct	
☑	Non-Breastfeeding	NAOMIE NELSON	11/30/2012	Full	Not Selected	Not Selected	Change Rx
☐	Infant	INGRID NELSON	5/31/2013	Not Selected	Not Selected	Not Selected	Change Rx
☐	Child	CHARLIE NELSON	2/28/2013	No Food Rx	No Food Rx	No Food Rx	Change Rx

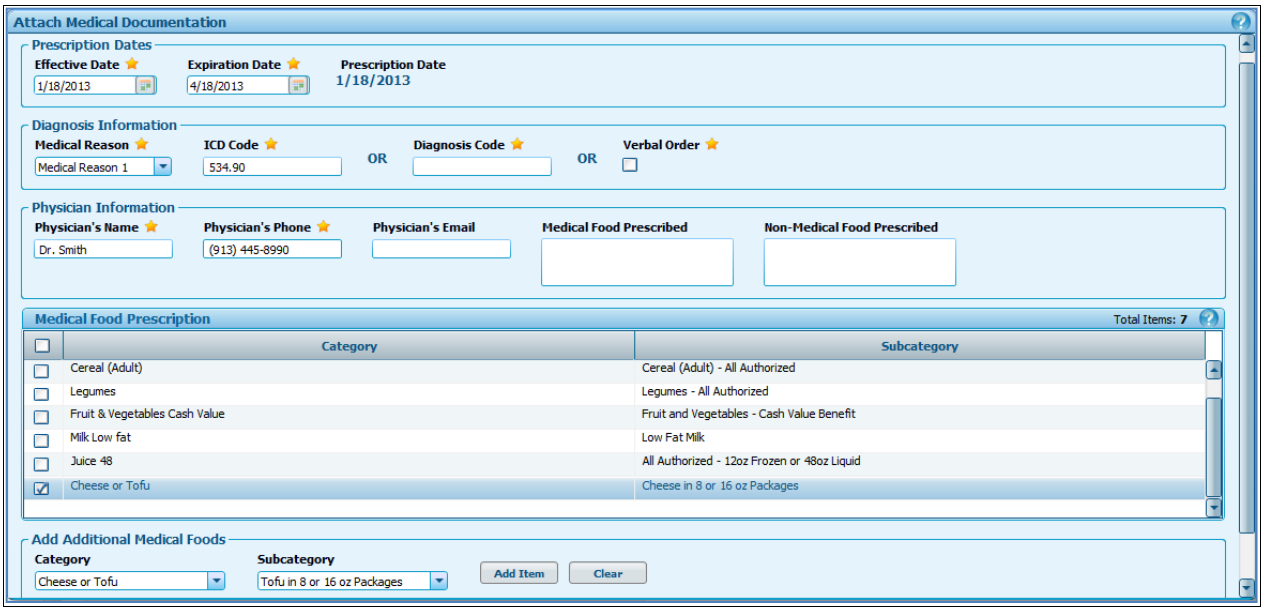
FDTS: 8/13/2012 - LDTS: 9/12/2012 Total Items: 6

Food Category	Subcategory	Quantity	UOM
Eggs	Eggs - All Authorized	1	Dozen
Cereal (Adult)	Cereal (Adult) - All Authorized	36	Ounces
Legumes	Legumes - All Authorized	1	Containers
Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Benefit	$10.00	$$$
Milk Low fat	Low Fat Milk	3.25	Gallons
Cheese or Tofu	Cheese in 8 or 16 oz Packages	1	Pounds

Issuance Aggregation

Preview Checks Formula Wizard Issue Cancel

If the quantity is over the maximum and under the Medical Max, the Medical Documentation will open. For example, in the above case, if the added food item was for Tofu over the 1-pound maximum, then the Medical Documentation screen displays the documentation required for Tofu. The following screen shows the result of trying to add more than 1 pound of a milk substitute, in this case, Tofu. When the Medical Documentation is completed, then the Category Maximum Quantity shows the medical maximum, which is 5 pounds of Cheese/Tofu for a Non-Breastfeeding woman.



Only check the medical food that is being added to the prescription.

After completing the Medical Documentation, click Save. The Prescribe Food screen displays. In this scenario the medical documentation is not necessary.

Congratulations!

You have successfully completed the **Prescribe Food: Adding and/or Modifying Food Prescriptions for a Woman or a Child** process.

Prescribe Food: Adding and/or Modifying Food Prescriptions for Formula-fed Infants

This scenario describes the process of prescribing formula for infants. The process is different for prescribing formula since it is linked to the information regarding breastfeeding status on the **Health Information** screen. It is assumed that you have logged on and searched for and selected your family. Since it is necessary that participants be certified before they can have food prescribed, it is assumed that all participants in this family have been certified.

This process includes the following task(s):

Task A. Creating a New Food Prescription, Issuance Day or Frequency **8-13**

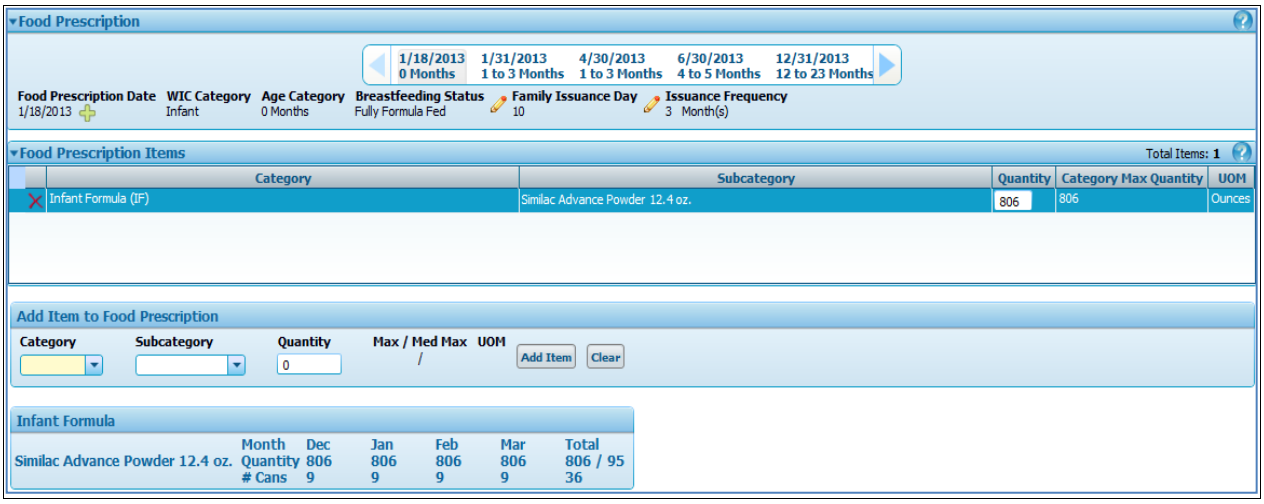
Task B. Modifying the Subcategory or Quantity of Infant Formula **8-14**

Task C. Adding Formula to Fully Breastfeeding Package **8-16**

Task A. Creating a New Food Prescription, Issuance Day or Frequency

Complete the following steps to perform this task:

1. Select the infant participant who is ready for a food prescription.
2. Go to **Quick Links → Issue Benefits → Prescribe Food**. The **Prescribe Food** screen displays.



Examine the Food Prescription Date, Family Issuance Day, and Issuance Frequency. If the defaulted settings are appropriate, then proceed to the next Task to tailor the food prescription items. To modify the items in the Food Prescription box, see Task A in the scenario Adding or modifying Food Prescriptions for a Woman or Child.

Task B. Modifying the Subcategory or Quantity of Infant Formula

Complete the following steps to perform this task:

1. Review the system generated infant formula (based on the breastfeeding status as indicated on the **Health Information** screen, age, and risk criteria).

   a. To accept the system generated items, do the following:

      i. Enter the **Quantity** of the formula to be prescribed.

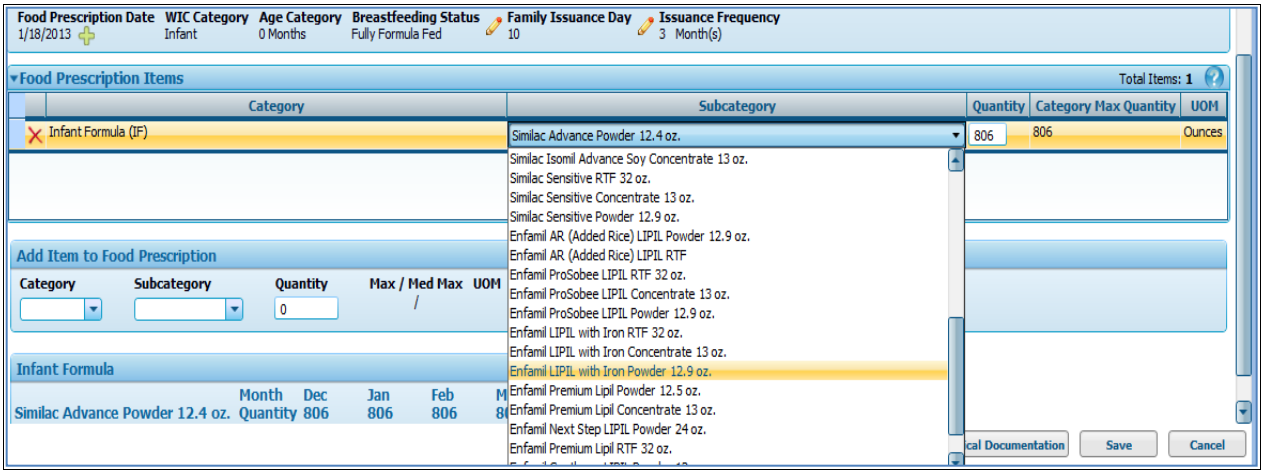
> The Quantity for the default infant formula may be **0** or set at the Category Max Quantity. This is a state configurable item. If the quantity is initially set to **0** for the default formula, it will be up to clinic staff to set the quantity for each of the prescriptions covering the infant certification period. If a default quantity is provided, WIC staff may change the quantity or confirm the default quantity.

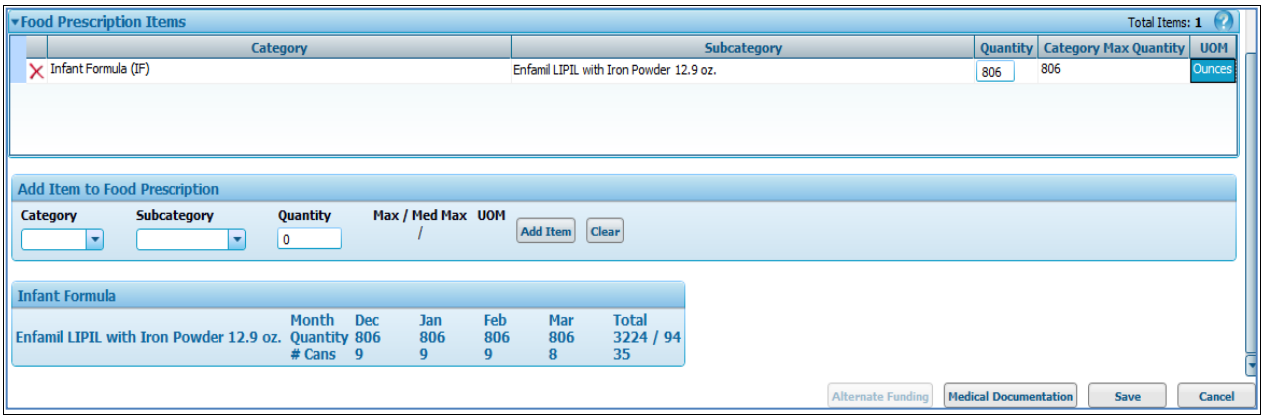
      ii. Click **Save**. A status message indicates success and the **Issue Food Instruments** screen displays.

   b. To select a different infant formula, do the following:

      i. Within the **Food Prescription Items** grid, select the desired formula under the **Subcategory** column.

      ii. Enter the **Quantity** of the formula to be prescribed.





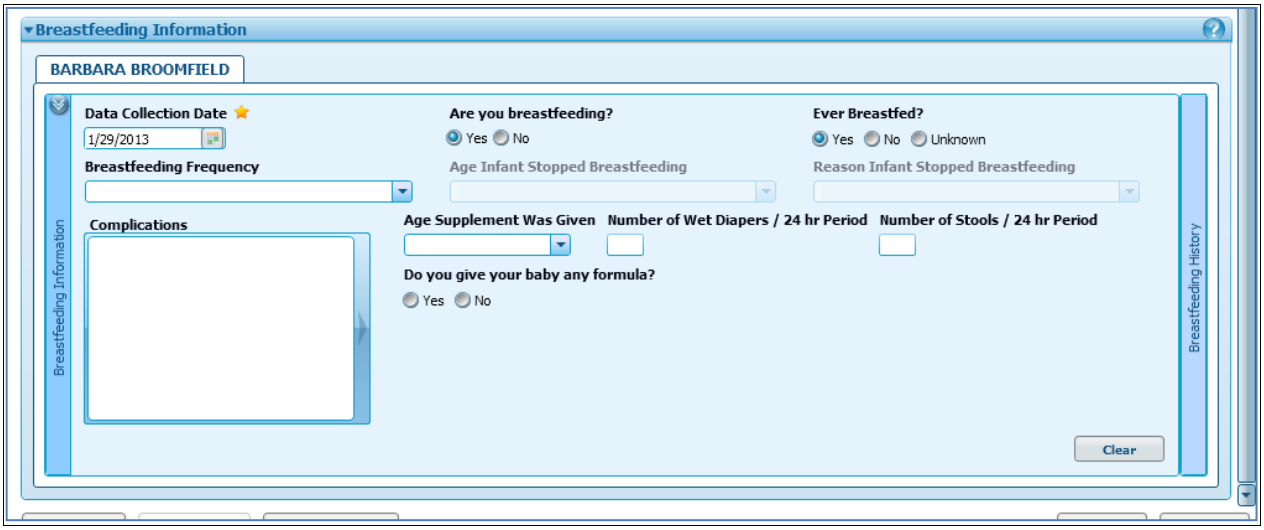
iii. Click **Save**. A status message indicates success and the **Issue Food Instruments** screen displays.

2. To modify the quantity of formula (based on your estimate of usage) enter the appropriate amount in the **Quantity** column field. The number of cans per month will adjust based on that quantity.

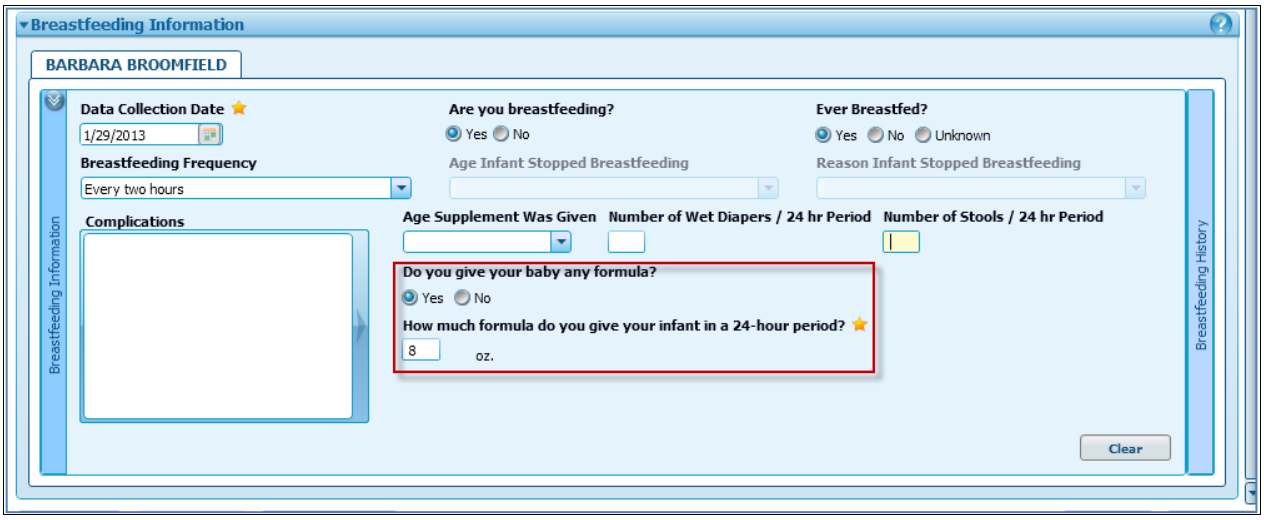
Task C. Adding Formula to Fully Breastfeeding Package

Complete the following steps to perform this task:

1. View the Breastfeeding Information on the infant's Health History screen, which indicates fully breastfeeding with no formula provided.

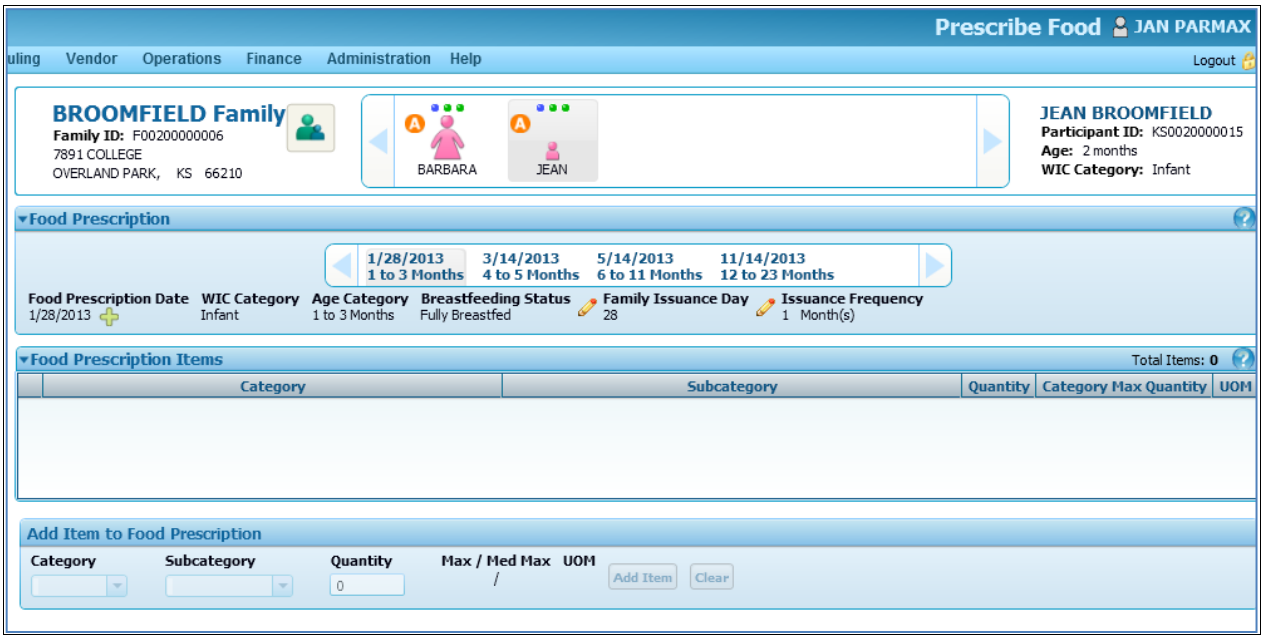


2. To add formula to an infant without formula, such as a fully breastfed infant, first change the status from fully breast feeding on the **Health Information** screen; enter the amount of formula given in a twenty-four-hour period, and click **Save**.

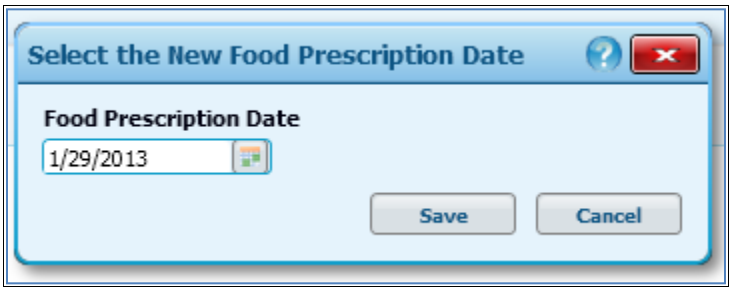


This task applies when a fully breastfed infant is changed to a formula fed infant after the fully breastfed food package was assigned.

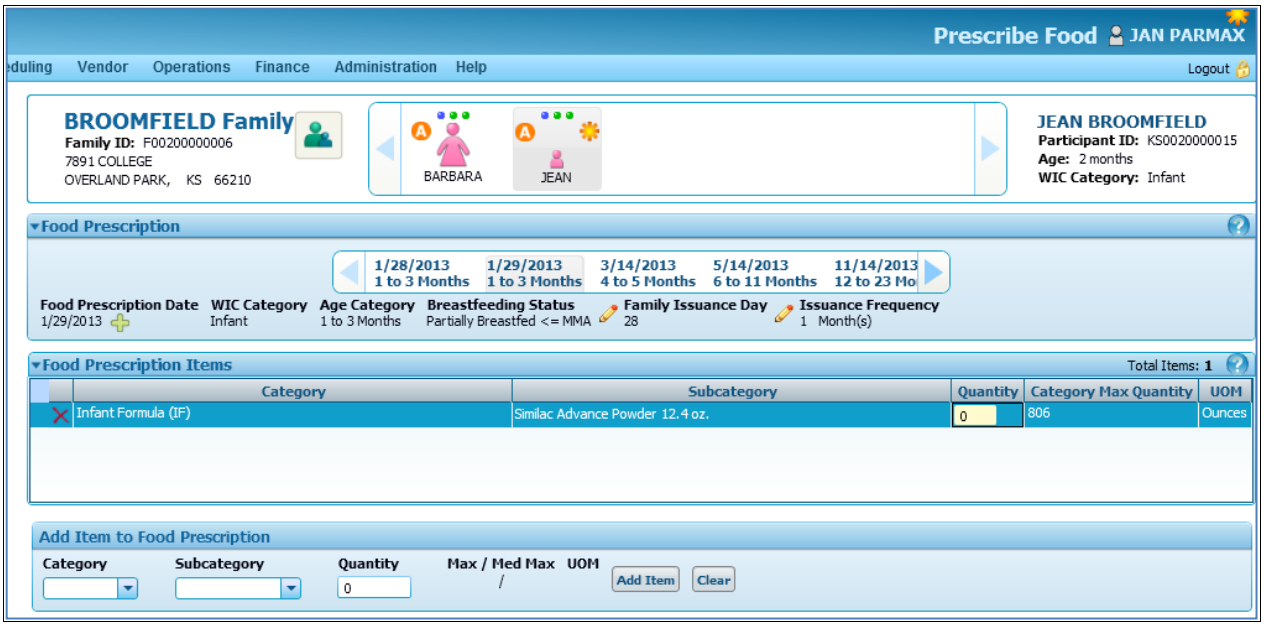
3. Go to the **Prescribe Food** screen. View status as Fully Breastfed before Health information change.



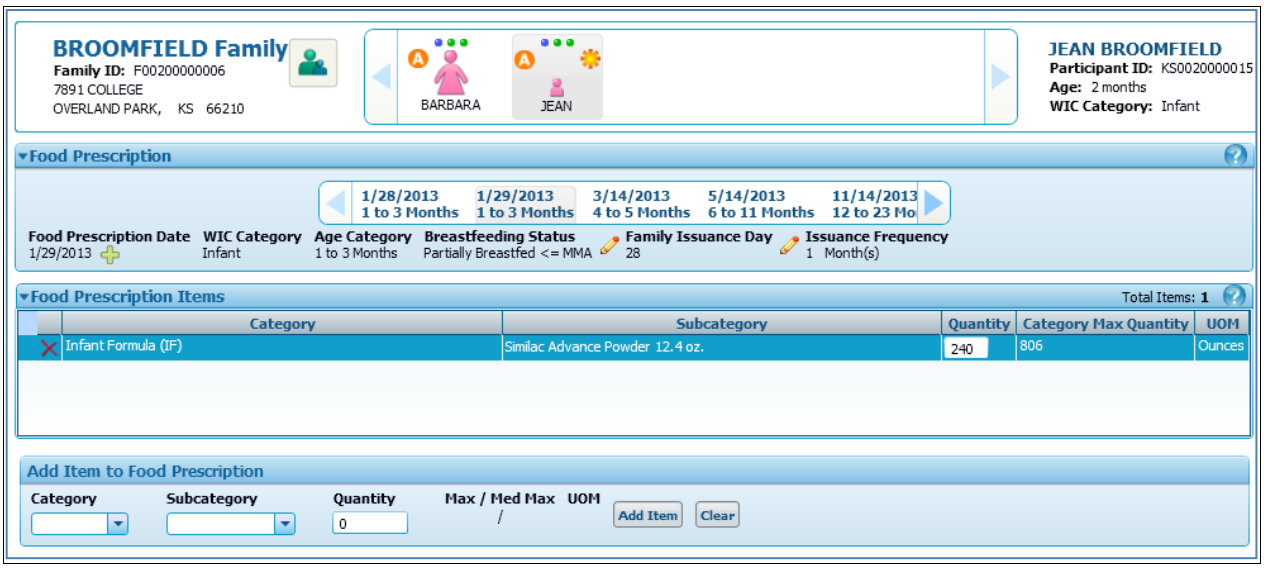
4. Create a new Food Prescription Date.



This will cause the Food Prescription to change the status from Fully Breastfed to Formula Fed and suggest the default formula. In this case the status is Partially Breastfed <= MMA since the formula given was less than the Monthly Maximum Amount for Partial Breastfed infants.

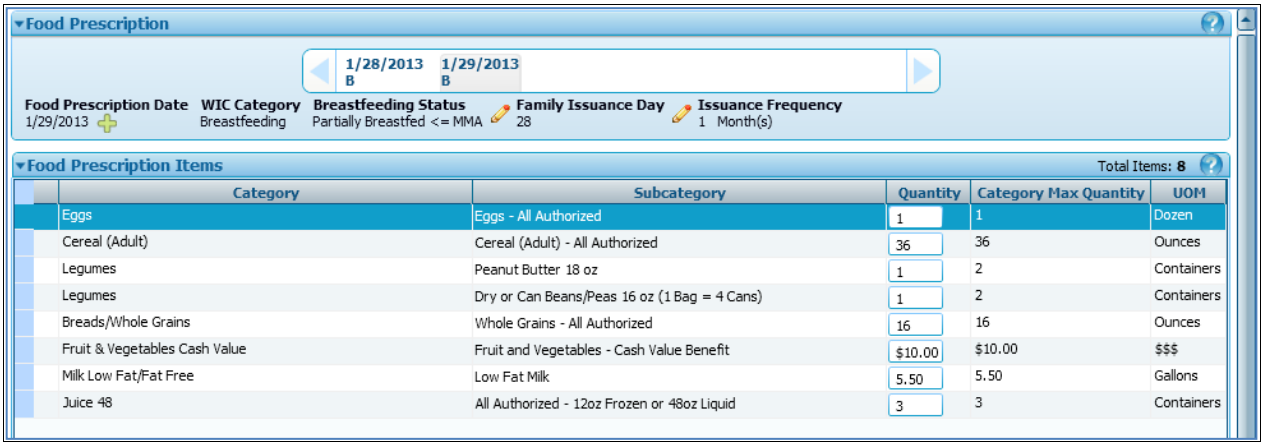


5. Accept the default formula or select another formula from the **Subcategory** drop down list box.
6. Enter the quantity in the **Quantity** text box. The quantity cannot exceed the maximum.



In this case the quantity was 240 (8 ounces x 30 days/month = 240) since 8 ounces per day was indicated on the Health History screen.

7. Click **Save**. The **Issue Food Instruments** screen displays.
8. View the mother's prescription. It displays Partially Breastfed <= MMA.



Food Prescription

1/28/2013 B | 1/29/2013 B

Food Prescription Date	WIC Category	Breastfeeding Status	Family Issuance Day	Issuance Frequency
1/29/2013	Breastfeeding	Partially Breastfed <= MMA	28	1 Month(s)

Food Prescription Items — Total Items: 8

Category	Subcategory	Quantity	Category Max Quantity	UOM
Eggs	Eggs - All Authorized	1	1	Dozen
Cereal (Adult)	Cereal (Adult) - All Authorized	36	36	Ounces
Legumes	Peanut Butter 18 oz	1	2	Containers
Legumes	Dry or Can Beans/Peas 16 oz (1 Bag = 4 Cans)	1	2	Containers
Breads/Whole Grains	Whole Grains - All Authorized	16	16	Ounces
Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Benefit	$10.00	$10.00	$$$
Milk Low Fat/Fat Free	Low Fat Milk	5.50	5.50	Gallons
Juice 48	All Authorized - 12oz Frozen or 48oz Liquid	3	3	Containers

Congratulations!

You have successfully completed the **Prescribe Food: Adding and/or Modifying Food Prescriptions for Formula-fed Infants** process.

Prescribe Food: Changing from Breastfeeding to Non-Breastfeeding

This scenario assumes that a family with a fully breastfeeding woman and her infant is selected and the breastfeeding woman's icon in the family header is selected.

This process includes the following task(s):

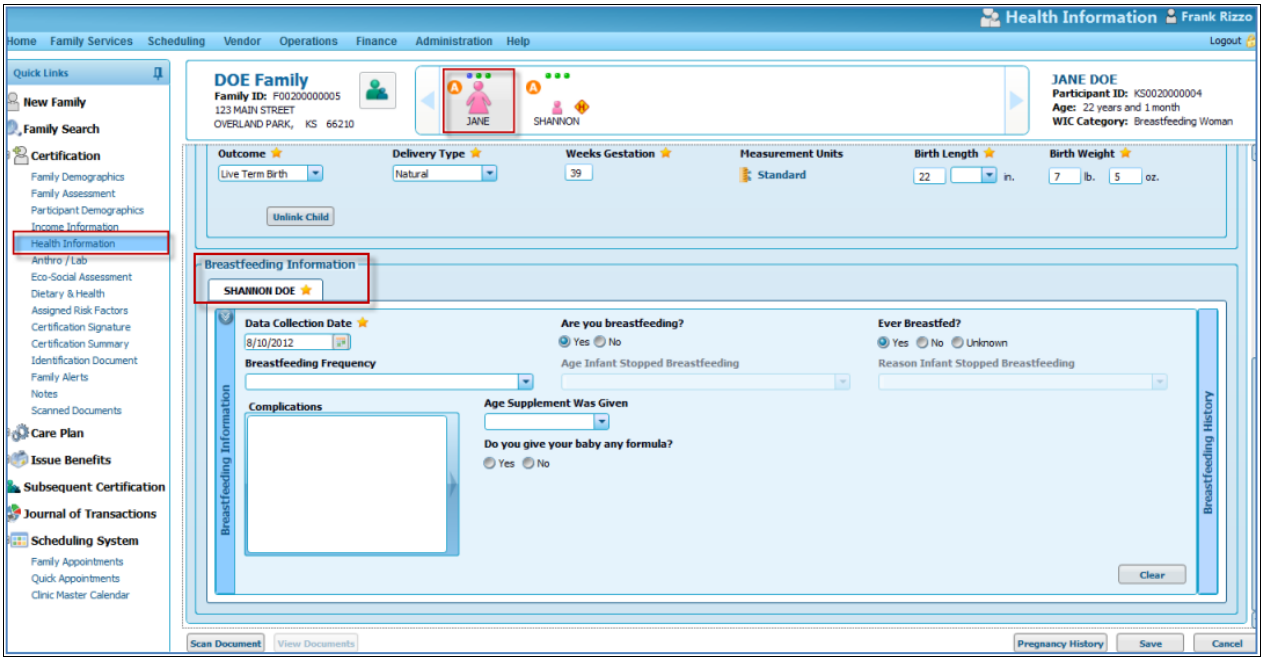
Task A. Changing WIC Category of Woman from Breastfeeding (BF) to Non-BF and Changing the Infant's BF Status from Fully Breastfed to Fully Formula Fed 8-21

Task B. Changing Food Prescription of Infant to Provide Formula.....8-24

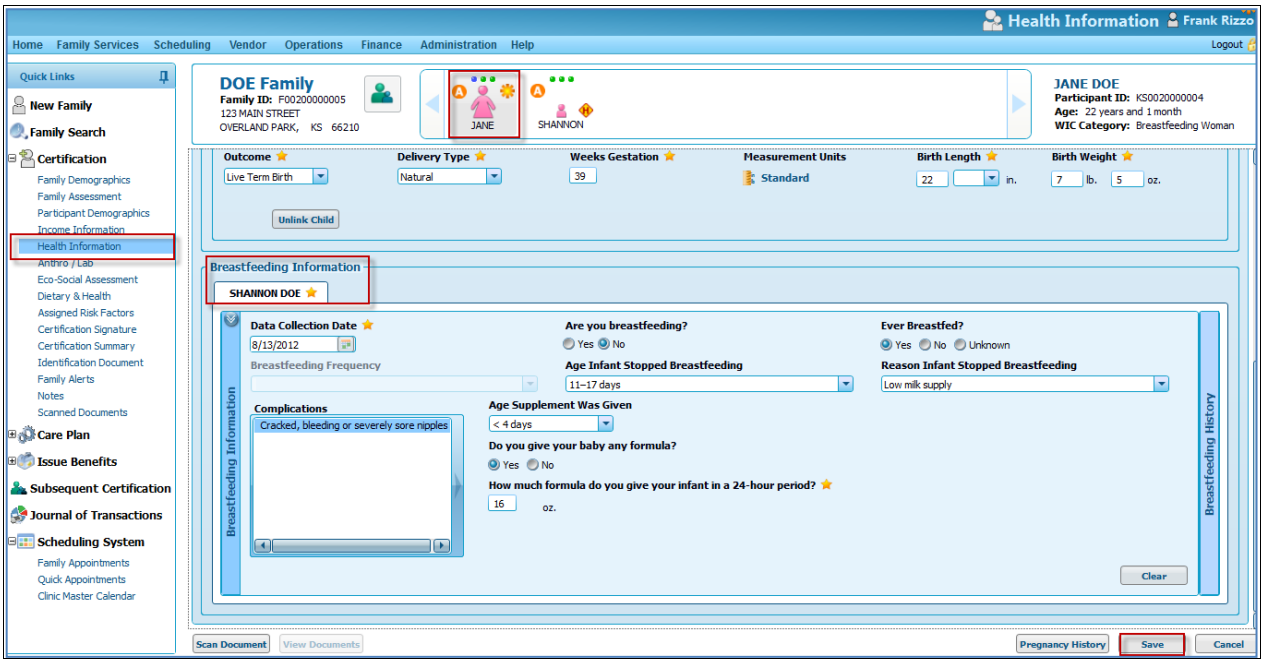
Task A. Changing WIC Category of Woman from Breastfeeding (BF) to Non-BF and Changing the Infant's BF Status from Fully Breastfed to Fully Formula Fed

Complete the following steps to perform this task:

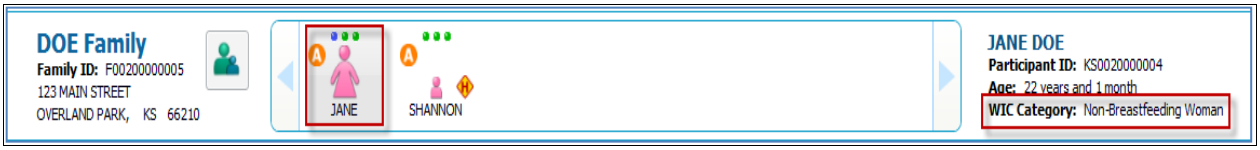
1. Go to **Quick Links → Certification→ Health Information**. The **Health Information** screen displays.

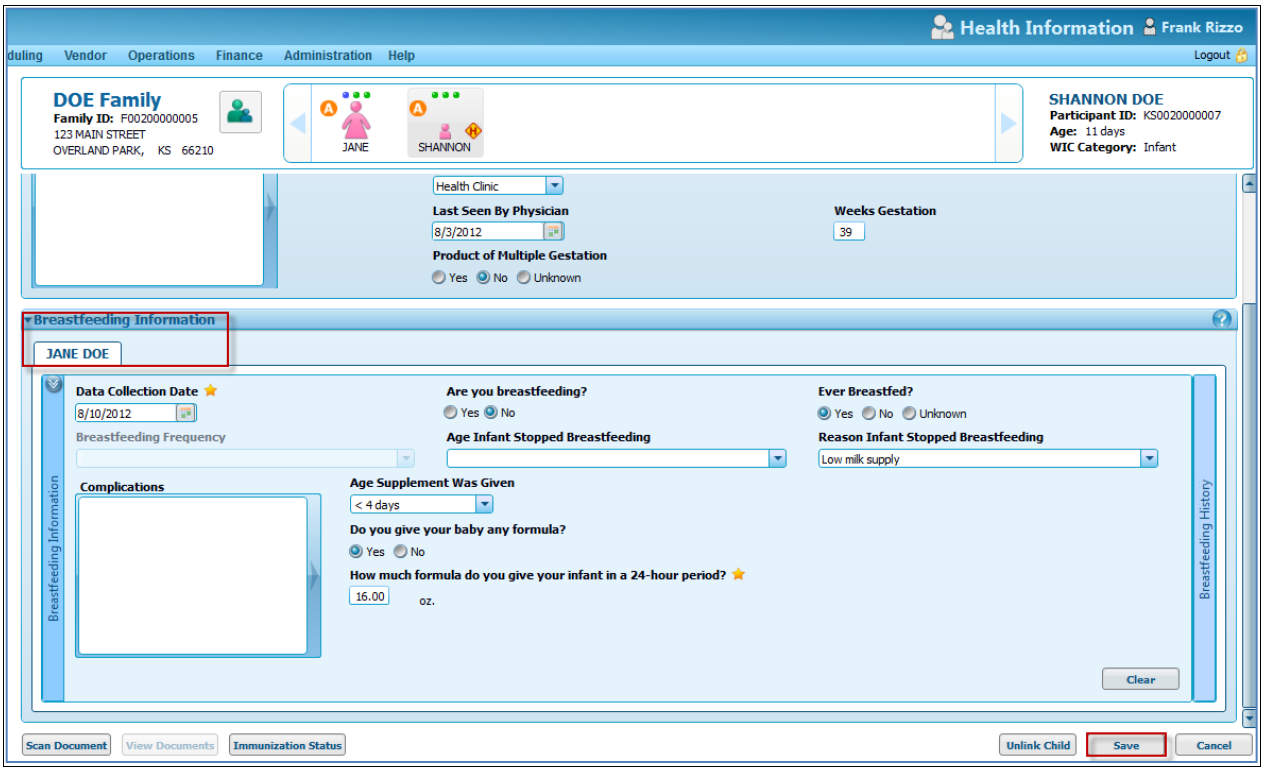


2. Under **Breastfeeding Information**, click **No** under **Are you breastfeeding**. The screen refreshes and additional items are added for you to complete.
3. Select the **Age Infant Stopped Breastfeeding**.
4. Select the **Reason Infant Stopped Breastfeeding**.
5. Select the **Age Supplement Was Given**.
6. Enter **How much formula do you give your infant in a 24-hour period**.



7. Click **Save**. The screen refreshes and the woman's **WIC Category** changed to "Non-Breastfeeding Woman" and the linked infant's **Breastfeeding Status** changed to "Fully Formula Fed".



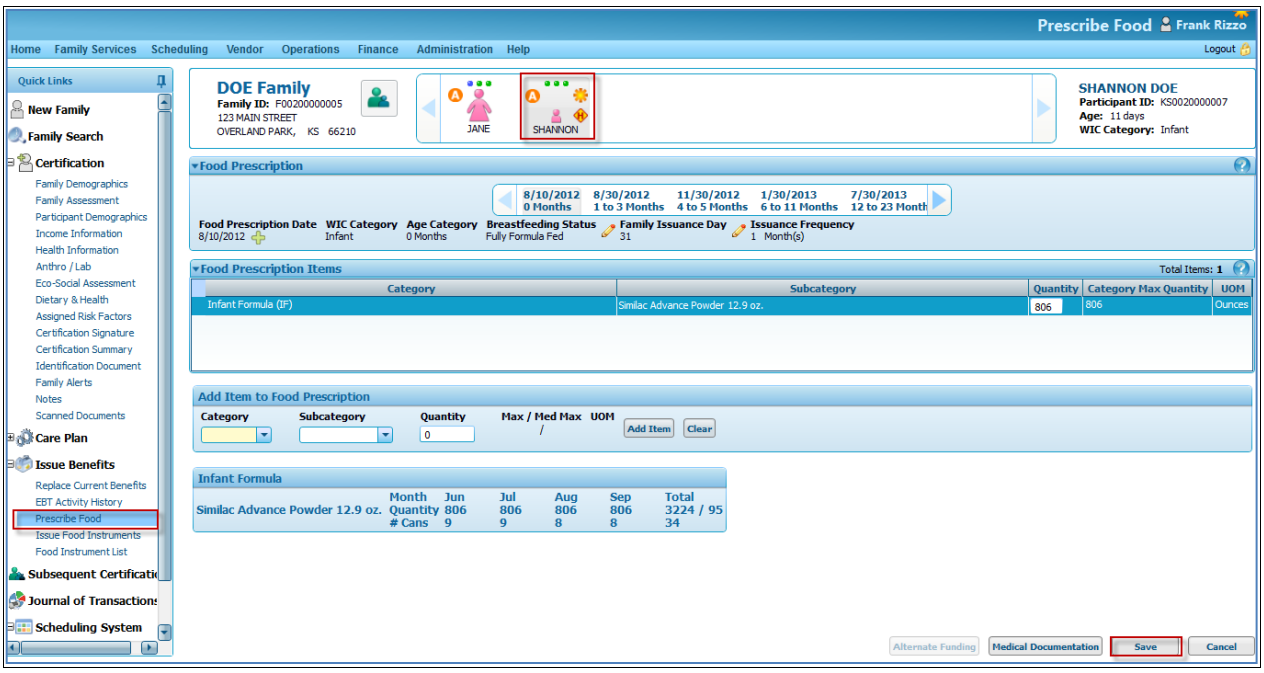


The woman who is fully breastfeeding will have her WIC category changed in the Health Information Screen using the BF question. The linked infant will have their BF status automatically changed as a result of changing the mother's status. The woman's WIC Category can be viewed in the Family Header. The infant's breastfeeding status can be viewed on the Prescribe Foods screen after a new food prescription is added (as described in Task B below).

Task B. Changing Food Prescription of Infant to Provide Formula

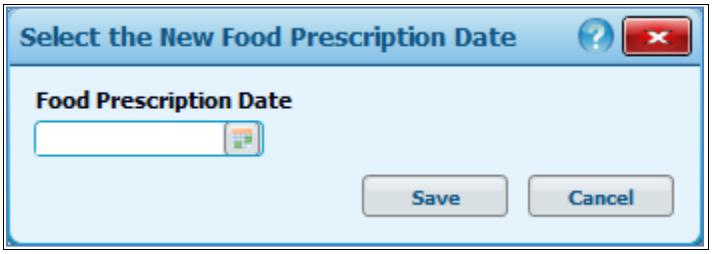
Complete the following steps to perform this task:

1. While the Infant icon is selected, go to **Quick Links→ Issue Benefits → Prescribe Food**. The **Prescribe Food** screen displays.



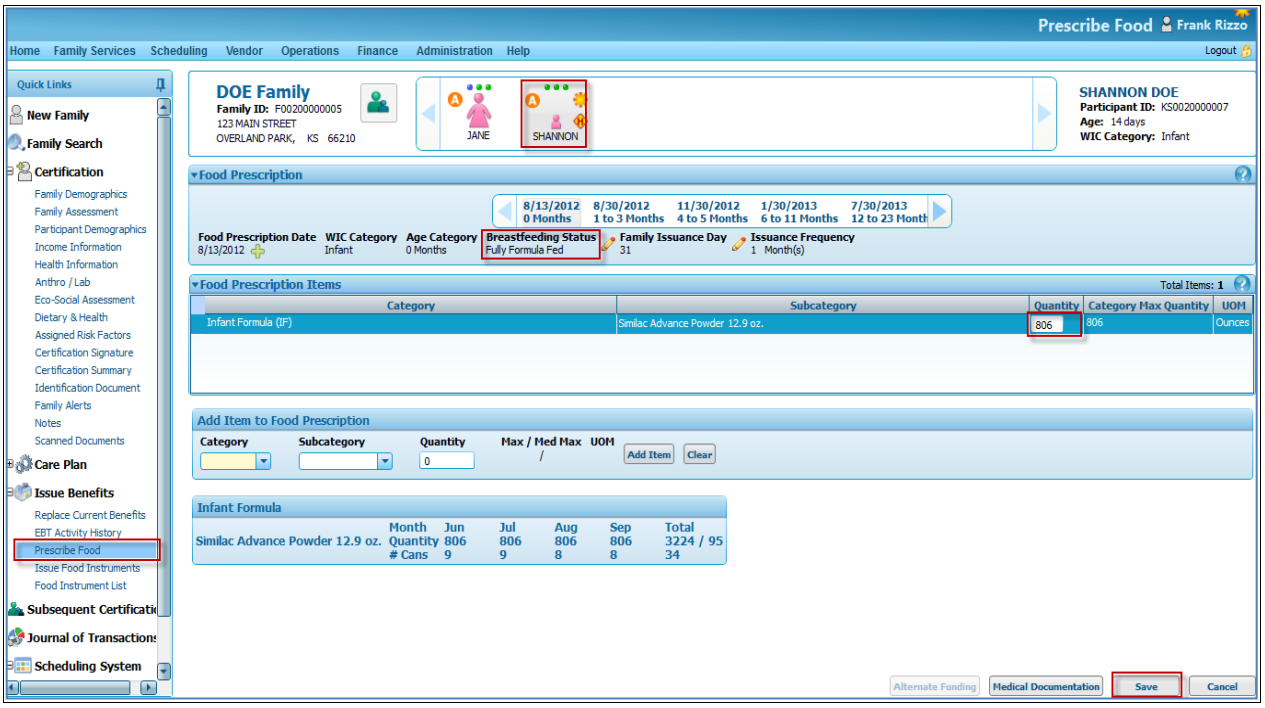
2. The **Food Prescription Date** defaults to the current date. Change the date if necessary.

3. To change the date, Click **Add** button (+) next to the current date. The screen refreshes and the **Select the New Food Prescription Date** screen displays.



If there is already a Fully Breastfed Prescription for today's date, then go to step 4 to select a formula to change the prescription.

4. The default standard infant formula displays within the **Food Prescription Items** grid. Change the quantity from zero to the **Category Max Quantity** value. The value may vary depending on state configuration.



5. If the standard formula is acceptable, go to step 8. If not, select **Infant Formula** from the **Category** drop down list box in the **Add Item to Food Prescription**.

6. Select the type of formula from the **Subcategory** drop-down list and enter the quantity of formula equal to the maximum for a fully formula fed infant.

7. Click **Add Item**. The screen is refreshed and displays the newly added food prescription.

8. Click **Save**. A status message displays indicating success and the **Issue Food Instruments** screen displays.

After the prescription is changed from Fully Breastfed to Fully formula fed for an infant less than 4 months of age, the 4 month and 6-month prescriptions will have to be manually changed, along with the mother's, to formula fed.

Congratulations!

You have successfully completed the **Prescribe Food: Changing from Breastfeeding to Non-Breastfeeding** process.

Prescribe Food: Voiding and Replacing Benefits Due to Formula Change

This scenario assumes a family has been selected with a formula fed infant in an active certification with issued benefits. It has been determined that the infant needs a formula change and the necessary WIC consultation has been provided to determine the formula change is necessary. If formula is brought into the clinic it can be returned and the participant credited the amount returned. It is assumed that you have searched for and accessed the family record and the infant icon is selected in the family header.

This process includes the following task(s):

Task A. Identifying Food Instruments that Have Been Issued and Redeemed and Voiding Food Instruments as Necessary **8-27**

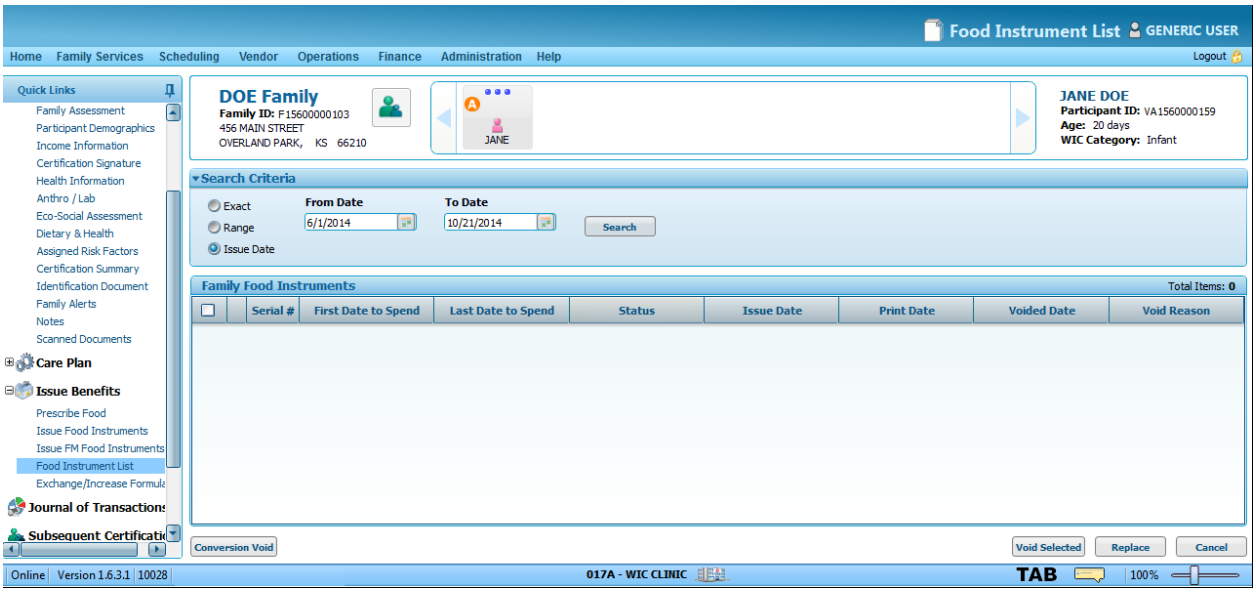
Task B. Selecting a Replacement Formula and Issuing Future Benefits **8-30**

Task C. Replacing the Current Month's Benefits **8-33**

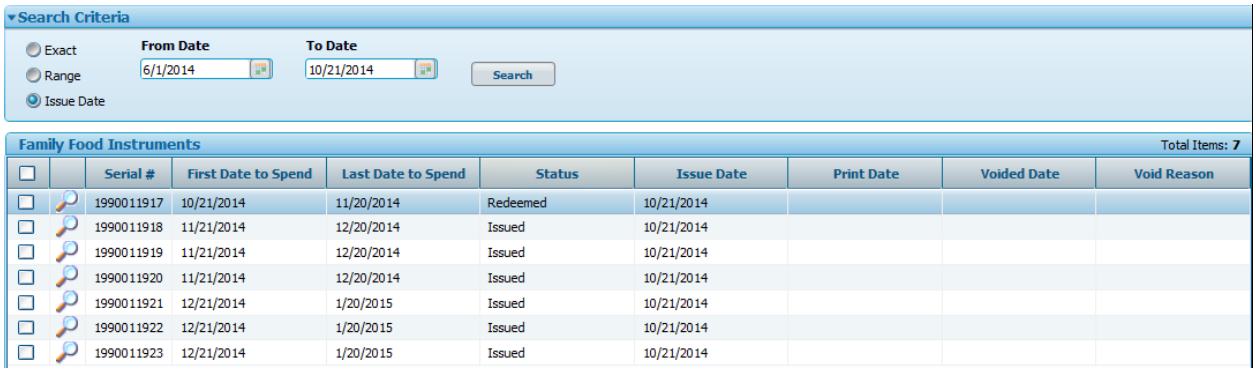
Task A. Identifying Food Instruments that Have Been Issued and Redeemed and Voiding Food Instruments as Necessary

Complete the following steps to perform this task:

1. If the food instrument checks are not available (in hand), go to **Family Services → Issue Benefits → Food Instrument List**. The **Food Instrument List** screen displays.



2. Select the desired food instrument search criteria and enter the requested information, then click **Search**. The screen refreshes and the **Family Food Instruments** grid displays the results of the search.



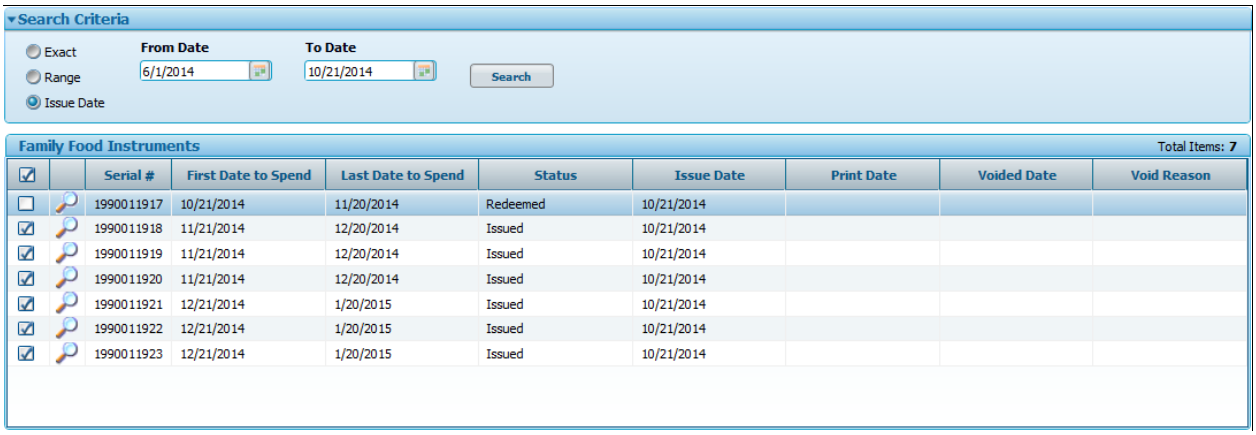
Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
1990011917	10/21/2014	11/20/2014	Redeemed	10/21/2014			
1990011918	11/21/2014	12/20/2014	Issued	10/21/2014			
1990011919	11/21/2014	12/20/2014	Issued	10/21/2014			
1990011920	11/21/2014	12/20/2014	Issued	10/21/2014			
1990011921	12/21/2014	1/20/2015	Issued	10/21/2014			
1990011922	12/21/2014	1/20/2015	Issued	10/21/2014			
1990011923	12/21/2014	1/20/2015	Issued	10/21/2014			

3. Identify the current month's food instruments to be voided by reviewing the details of the food instruments previously issued. Write these check numbers down to be used during a future Task.

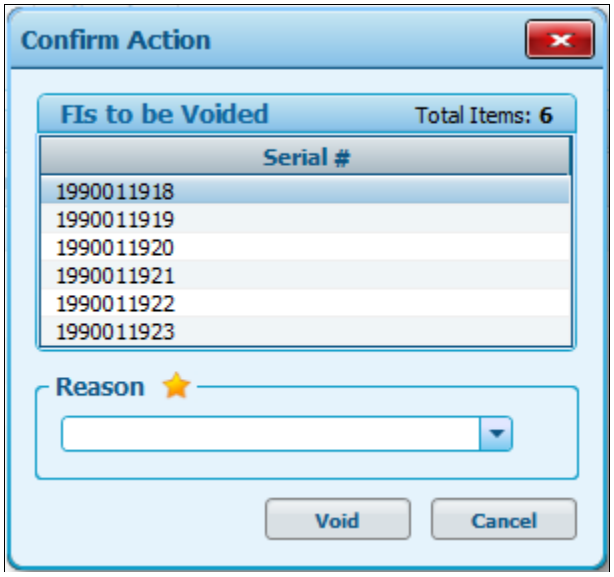
> Click the View button ( ) to view the details of a food instrument. The FI Details Panel screen displays and provides a variety of information including the food items and their quantities.
>
> If any benefits have been redeemed for the current month, the remaining unredeemed benefits

for the current month will be voided using the Exchange/Increase Formula screen explained within a later Task in this scenario.

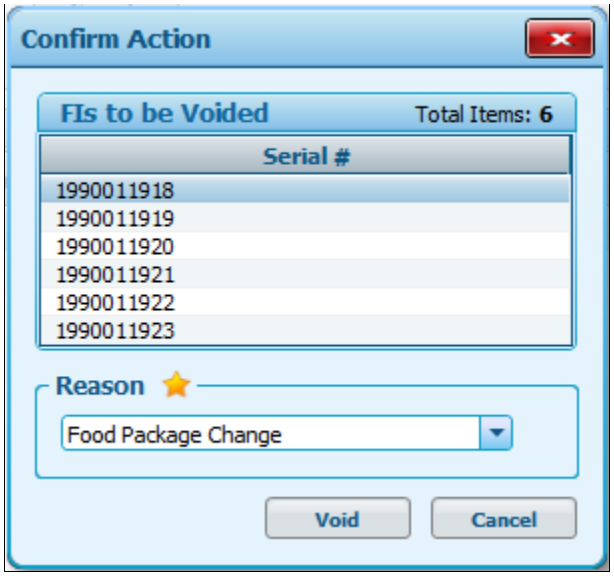
4. Select the future-dated benefits to be voided within the **Family Food Instruments** grid by selecting one or more checkboxes.



5. Click **Void**. The **Confirm Action** screen displays.



6. Select a reason why the benefit(s) are to be voided using the **Reason** drop down list.



7. Click **Void**. A status message displays indicating the selected benefits were voided and the **Status** of the previously selected benefits is updated within the **Family Food Instruments** grid.

Task B. Selecting a Replacement Formula and Issuing Future Benefits

Complete the following steps to perform this task:

1. Go to **Quick Links →Issue Benefits → Prescribe Food** to change the current formula in order to provide a replacement formula.

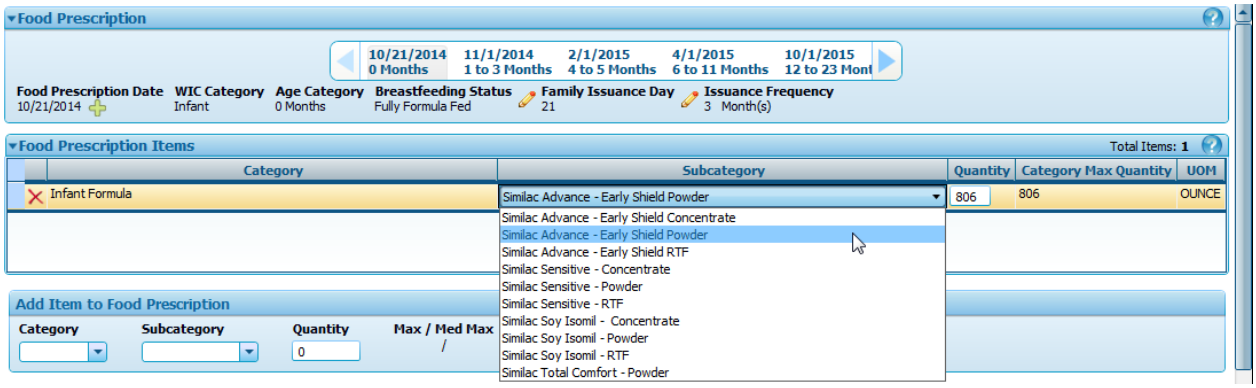
There are a couple of ways to select (or add) the replacement formula to a prescription and choosing which option to use depends on the situation. Bear in mind that a food prescription can be modified only if the food prescription's date is equal to or greater than the current system date. Add a new food prescription by clicking the Create New Food Prescription button (+) if necessary.

Choose one of the following options:

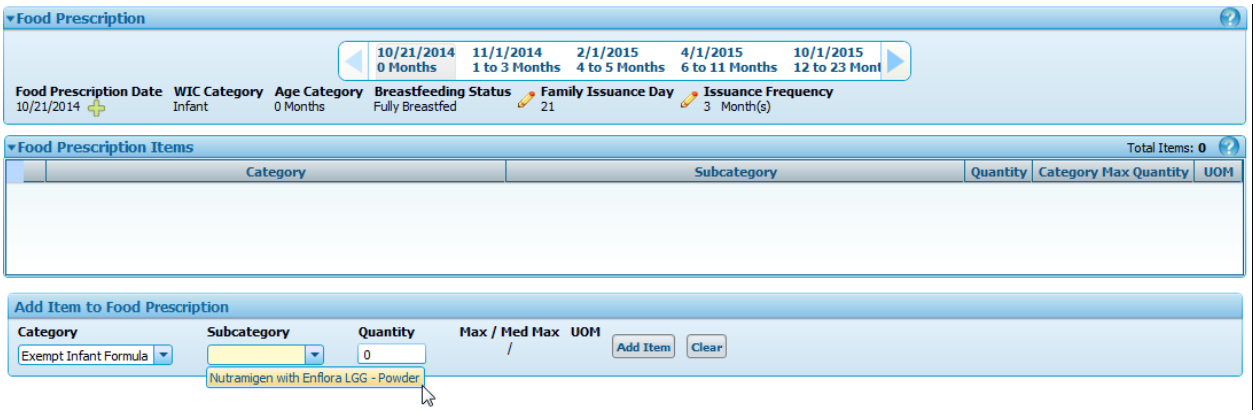
Select another formula within the same Category of foods: A replacement formula can be selected on a prescription by clicking the name of the current formula within the grid under the Subcategory column. When the current formula is selected, a drop down list of all active formulas within the same Category of food items displays. Select the replacement formula from this drop down list.

Use the Add Item to Food Prescription container: If the replacement formula is not associated within the same Category of foods, use the Add Item to Food Prescription container to add the replacement formula to the food prescription. For example, assume the original formula is listed as a contract formula. If the replacement formula is an exempt (specialized) formula, select Exempt Infant Formula from the Category drop down list and then select the new replacement formula using the Subcategory drop down list. It is necessary to enter the Quantity of the formula selected as well. Additionally, it may be a good idea to delete the original formula listed on the food prescription prior to adding the replacement formula to the prescription.

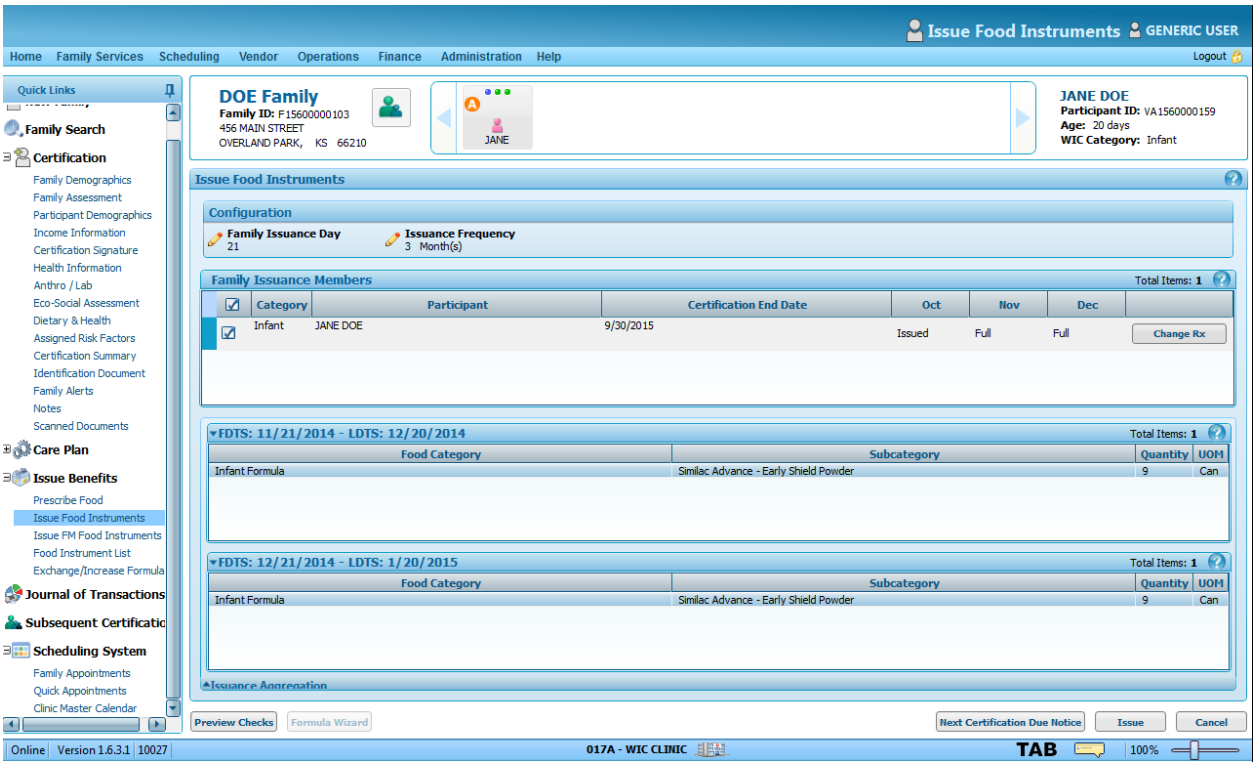
- Subcategory option



- Using the Add Item to Food Prescription option



2. Click **Save** after a new formula is prescribed. The **Issue Food Instruments** screen displays.

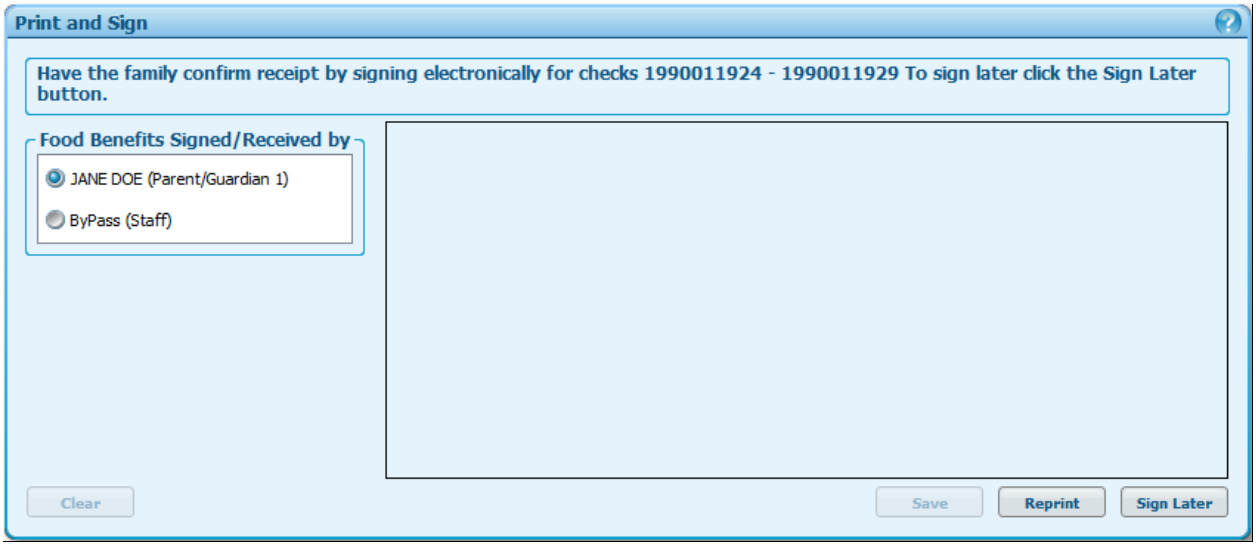


The benefits shown as available for issuance on the Issue Food Instruments screen will vary depending on the situation and the actions taken by the user prior to this point. Below are several examples. Assume three months of benefits were printed originally for the infant (the current month and two future-dated months):

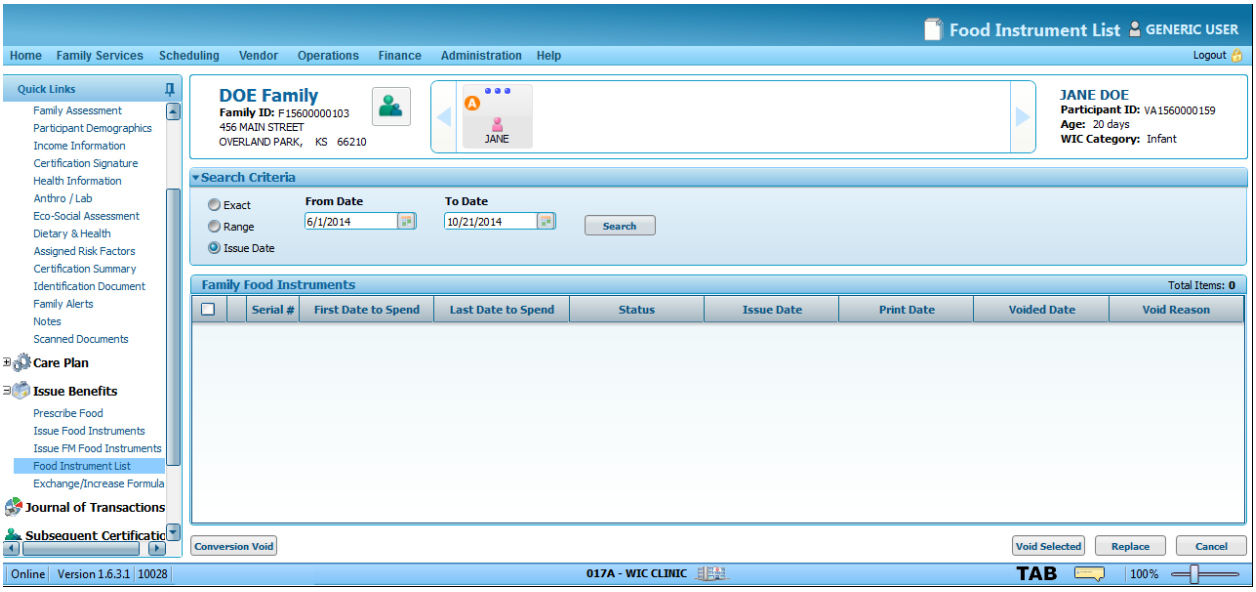
If no benefits were redeemed for the original issuance, all three months of benefits could be voided and three months of replacement benefits would be listed on this screen and available for issuance.

If any benefit associated to the current month has been redeemed, only the future-dated benefits listing the replacement formula will be shown on this screen and available for issuance. Use this screen to issue the future-dated benefits, and then use the Exchange/Increase Formula screen to replace/exchange the current month's benefits. See Task C of this scenario for more information.

3. Click Issue to issue replacement benefits for the future dated benefits. The **Print and Sign** screen displays



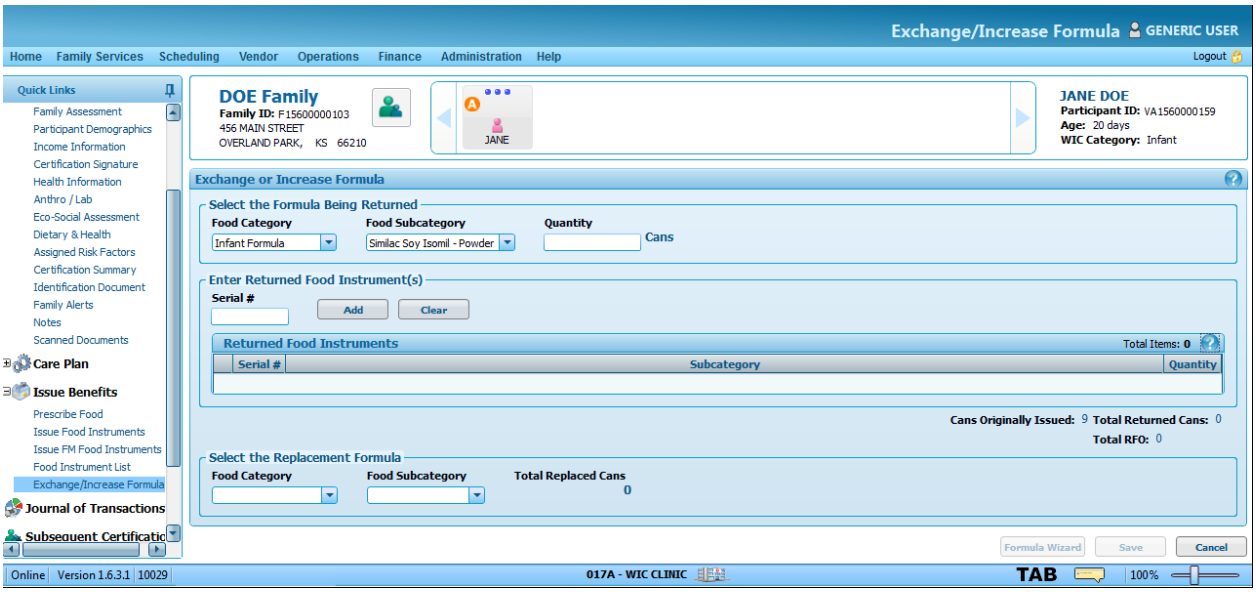
4. Direct the parent, guardian, or caretaker to sign the electronic signature pad to confirm the receipt of the future-dated replacement benefits and then click **Save**. The **Food Instrument List** screen displays.



Task C. Replacing the Current Month's Benefits

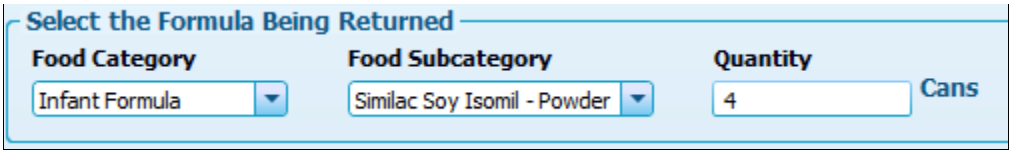
Complete the following steps to perform this task:

1. Go to the **Quick Links → Issue Benefits → Exchange/Increase Formula**. The **Exchange/Increase Formula** screen displays.



> The Exchange/Increase Formula screen can be used to replace formula returned by the client with a newly prescribed formula and/or it can be used to increase the amount of formula given to an infant.

2. Under **Formula Return**, select the appropriate **Food Category.**
3. Select the name of the formula being returned from the **Food Subcategory** drop-down list box.
4. Enter the number of cans returned in **Quantity**.



5. Under **Enter Returned Food Instruments**, enter the serial number(s) of the benefit(s) to be voided in **Serial #**.

6. Click **Add**. The screen refreshes and the returned check to be voided displays in the **Check Return** grid.

7. Repeat steps 5 and 6 until all checks to be voided are listed in the **Returned Food Instrument(s)** grid.
8. View the values displayed for the following items:
   - **Cans Originally Issued**
   - **Total Returned Cans**
   - **Total RFO**

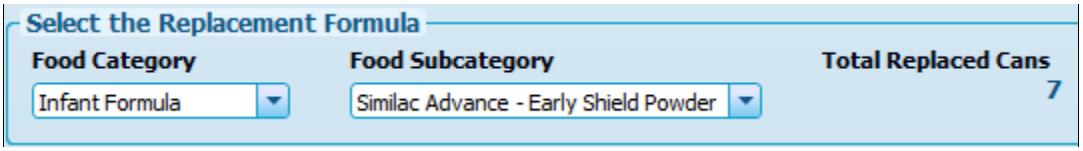
Cans Originally Issued displays the number of cans originally issued to the infant.

Total Returned Cans displays the physical number of formula cans returned by the family and the number of formula cans listed as a result of the food instrument listed in the Returned Food Instruments grid (Physical cans returned + Unredeemed Food Instrument cans = Total Returned Cans)

Total Reconstituted Fluid Ounces (RFO) displays the reconstituted fluid ounces of the Total Returned Cans of the original formula.

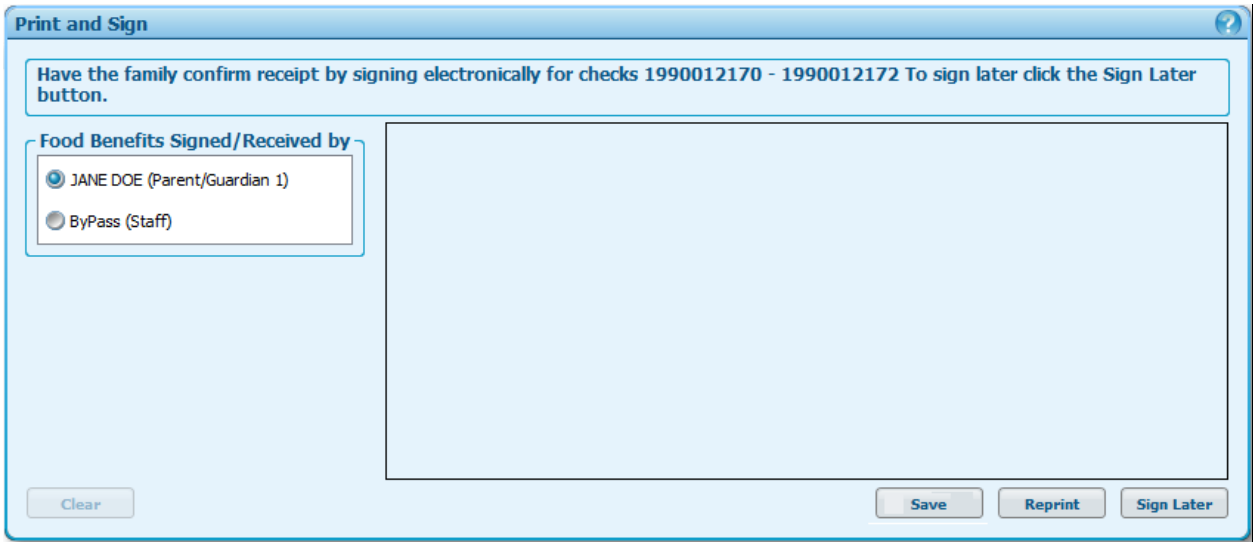
9. Under **Select the Replacement Formula**, select the appropriate **Food Category** of the replacement formula.

10. Under **Select the Replacement Formula**, select the appropriate **Subcategory** of the replacement formula.



The value listed for the Total Replaced Cans is calculated by dividing the Total RFO value by the RFO of one can of the replacement formula. For example, if Total RFO equals 630 and the reconstituted value of one can of the replacement formula equals 90, then the Total Replaced Cans value will equal 7 (630 / 90 = 7).

11. Click **Save**. The **Print and Sign** screen displays.



If cans of the replacement formula are available within the local inventory, the Formula Wizard screen displays enabling the user to issue the replacement formula from the local inventory, if desired. If the user dismisses the Formula Wizard screen, the replacement formula is issued instead on a food instrument.

12. Instruct the Parent, Guardian, or Caretaker to sign the electronic signature pad for the replacement benefits and then click **Save**.

Replacement benefits are logged on the Food Instrument List screen like any other benefit that is issued. However, since Food Instrument(s) in a redeemed status from the original issuance cannot be voided, this may result in the appearance of over-issuance (even though that is not the

case). To view details of a returned formula transaction, review the Journal of Transactions.

Congratulations!

You have successfully completed the **Prescribe Food: Voiding and Replacing Benefits Due to Formula Change** process.

Issue Food Instruments

This scenario explains the process of issuing benefits to a family returning for benefit pickup. The following two examples are illustrated:

- Task A illustrates a family being issued benefits for the first time (after initial Certification) or a family picking up benefits on or after their established Family Issuance Day.
- Task B illustrates a family being issued three future months of benefits prior to their established Family Issuance Day. The current month of benefits must be in an Issued status for all members of the family eligible to receive benefits and the system must be configured accordingly to enable benefits to be issued early.

The following examples are provided without screen clips:

- Task C lists several examples without screen clips to further explain how the system reacts to a user attempting to issue benefits prior to the established Family Issuance Day.

This process includes the following task(s):

Task A. Issuing Family Benefits **8-38**

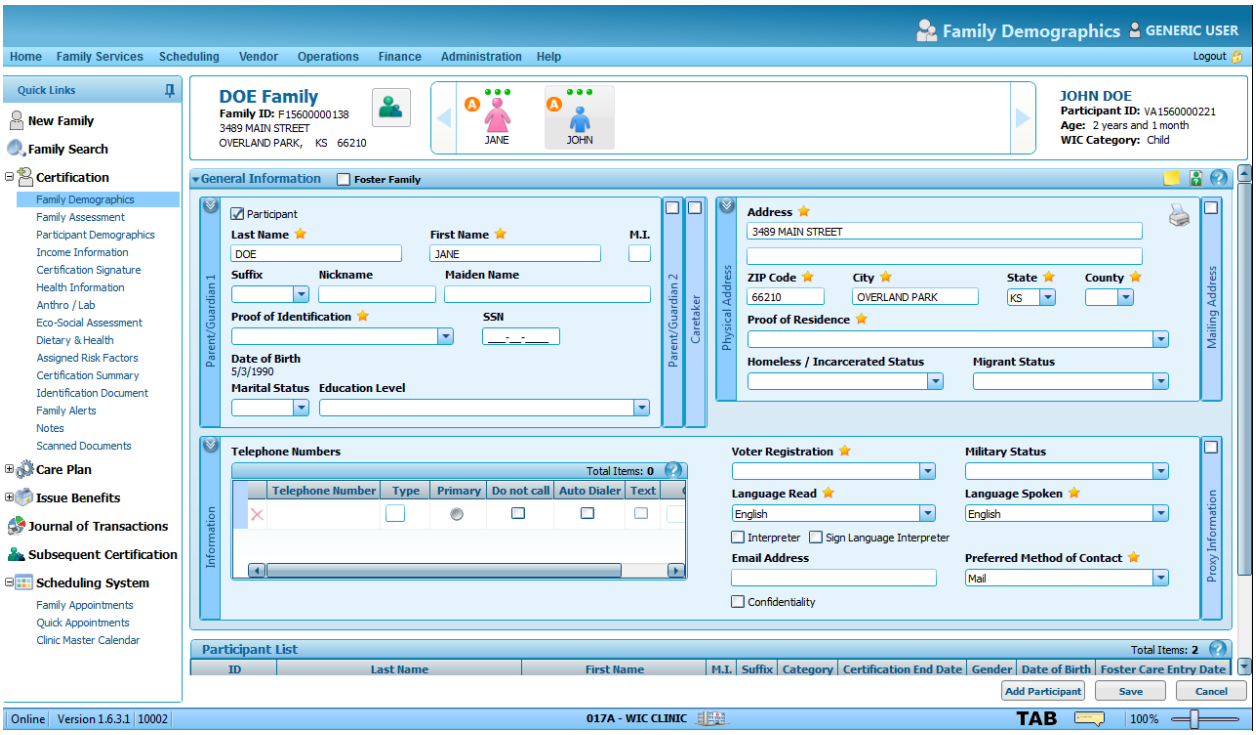
Task B. Issuing Family Benefits Prior to the Family Issuance Day **8-42**

Task C. Issuing Family Benefits Prior to the Family Issuance Day (Additional Examples) **8-46**

Task A. Issuing Family Benefits

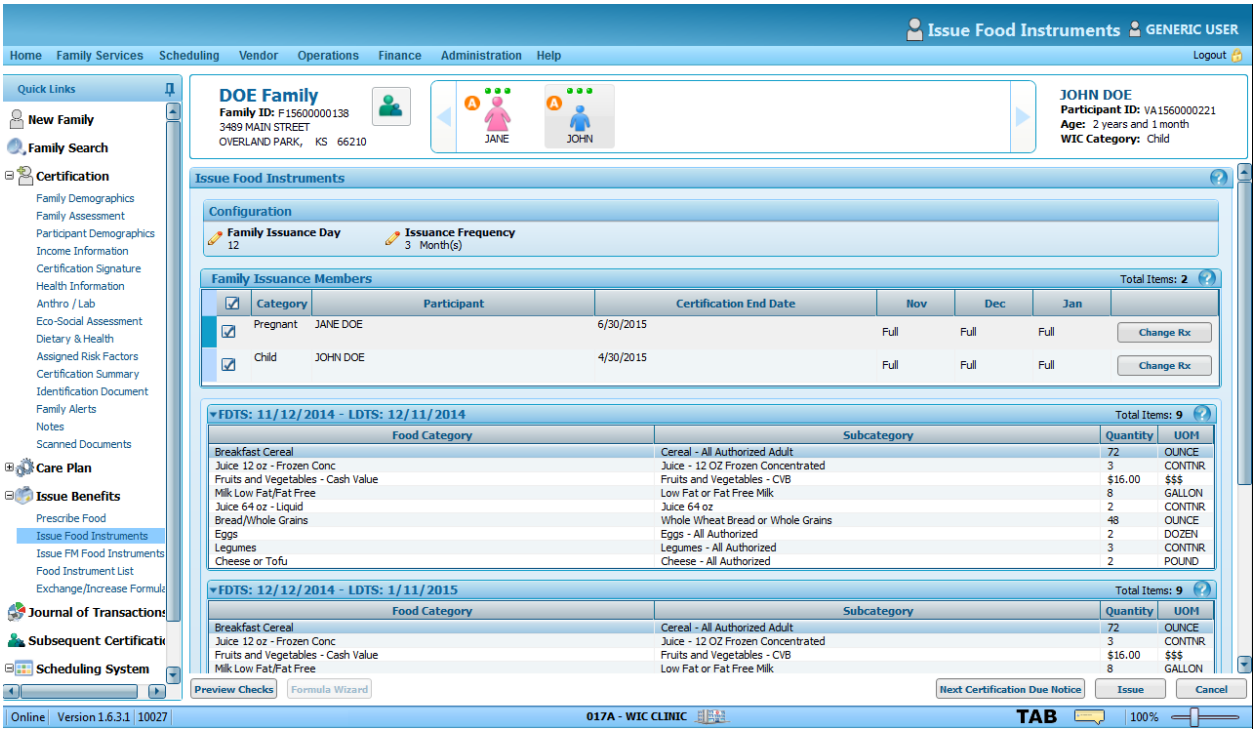
Complete the following steps to perform this task:

1. Access (or open) a family record. The **Family Demographics** screen displays.

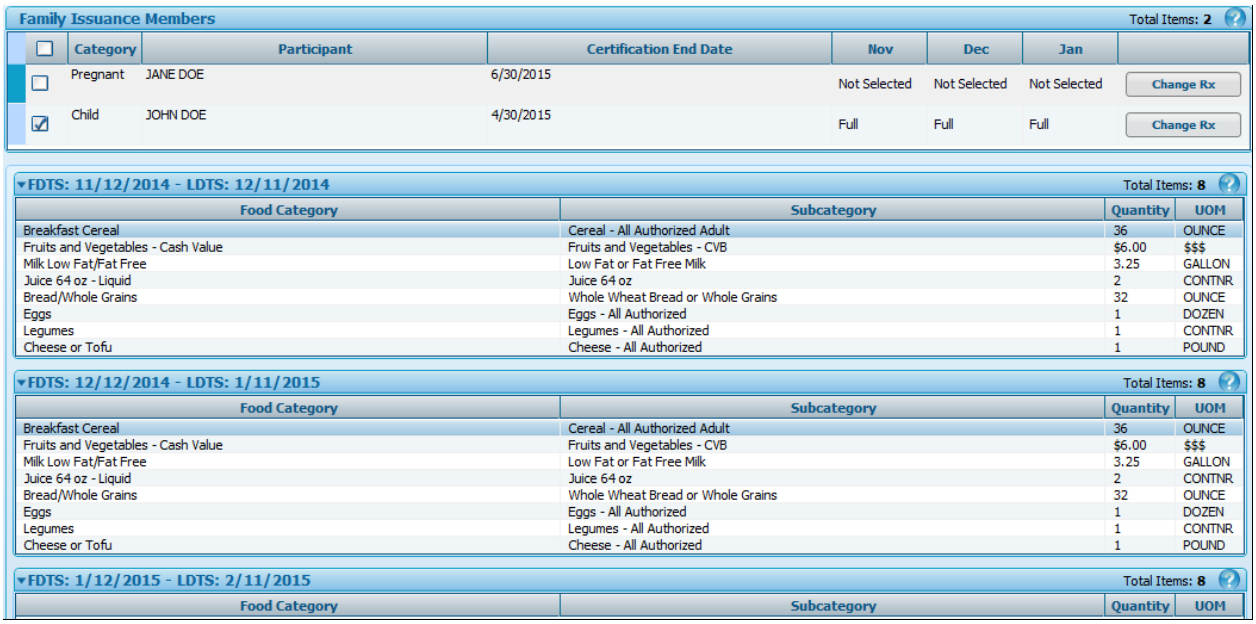


Assume both members are in an active Certification period and food items have been prescribed already.

2. Go to **Quick Links → Issue Benefits → Issue Food Instruments**. The **Issue Food Instruments** screen displays.



3. Check (or uncheck) rows in the **Family Issuance Members** grid as necessary to select the family members for benefit issuance. The grid is updated and displays your current selections.



Family Issuance Members Total Items: 2

	Category	Participant	Certification End Date	Nov	Dec	Jan	
☑	Pregnant	JANE DOE	6/30/2015	Full	Full	Full	Change Rx
☐	Child	JOHN DOE	4/30/2015	Not Selected	Not Selected	Not Selected	Change Rx

FDTS: 11/12/2014 - LDTS: 12/11/2014 Total Items: 8

Food Category	Subcategory	Quantity	UOM
Breakfast Cereal	Cereal - All Authorized Adult	36	OUNCE
Juice 12 oz - Frozen Conc	Juice - 12 OZ Frozen Concentrated	3	CONTNR
Fruits and Vegetables - Cash Value	Fruits and Vegetables - CVB	$10.00	$$$
Milk Low Fat/Fat Free	Low Fat or Fat Free Milk	4.75	GALLON
Bread/Whole Grains	Whole Wheat Bread or Whole Grains	16	OUNCE
Eggs	Eggs - All Authorized	1	DOZEN
Legumes	Legumes - All Authorized	2	CONTNR
Cheese or Tofu	Cheese - All Authorized	1	POUND

FDTS: 12/12/2014 - LDTS: 1/11/2015 Total Items: 8

Food Category	Subcategory	Quantity	UOM
Breakfast Cereal	Cereal - All Authorized Adult	36	OUNCE
Juice 12 oz - Frozen Conc	Juice - 12 OZ Frozen Concentrated	3	CONTNR
Fruits and Vegetables - Cash Value	Fruits and Vegetables - CVB	$10.00	$$$
Milk Low Fat/Fat Free	Low Fat or Fat Free Milk	4.75	GALLON
Bread/Whole Grains	Whole Wheat Bread or Whole Grains	16	OUNCE
Eggs	Eggs - All Authorized	1	DOZEN
Legumes	Legumes - All Authorized	2	CONTNR
Cheese or Tofu	Cheese - All Authorized	1	POUND

FDTS: 1/12/2015 - LDTS: 2/11/2015 Total Items: 8

Food Category	Subcategory	Quantity	UOM

The Family Issuance Members grid displays the months of benefits to be issued including each month's amount such as Full, ¾, ½, or ¼. Or 1/3, 2/3

Benefits can be previewed prior to printing by clicking the Preview Checks button.

If necessary, modify the Family Issuance Day and Issuance Frequency selections within the Configuration container by clicking the Edit button ( ).

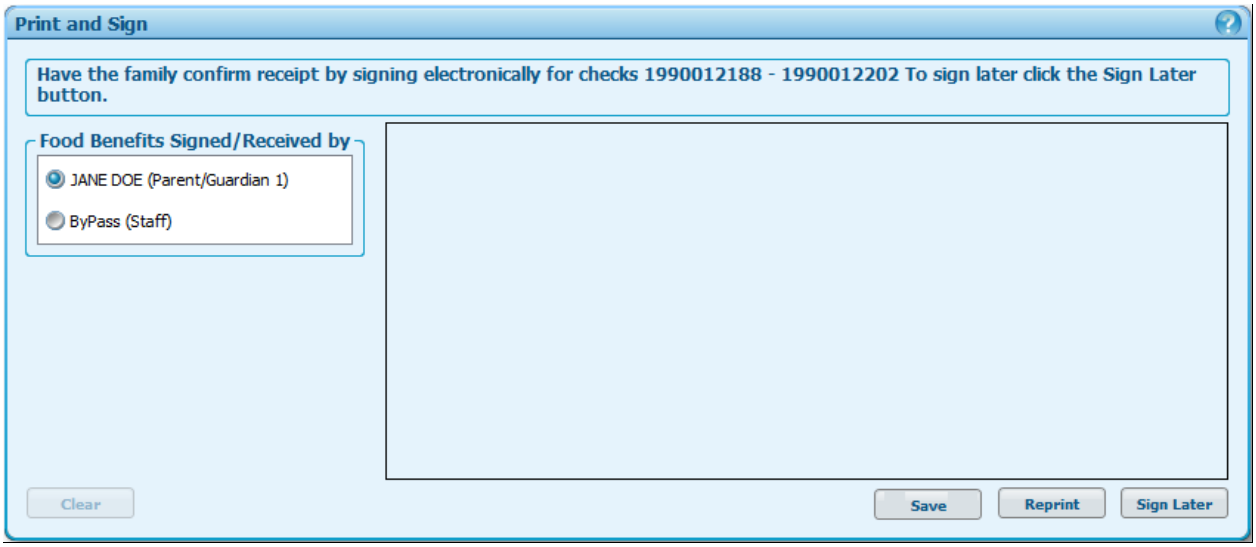
Configuration

Family Issuance Day
12

Issuance Frequency
3 Month(s)

4. Click **Issue** to issue/print food instruments to the selected family members. The **Electronic Signature for Benefits** screen displays.

5. Select the individual signing for the benefits in the **Food Benefits Signed/Received by** radio button group box.

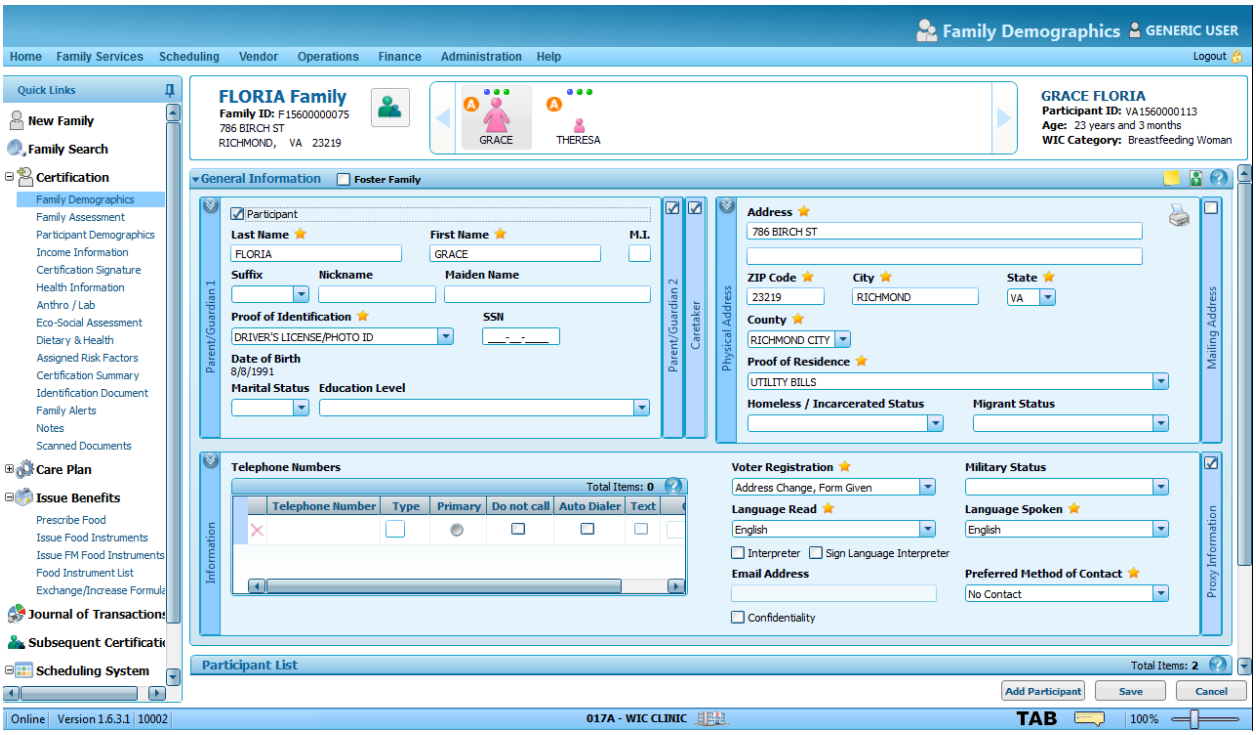


6. Direct the individual to sign the electronic signature pad and then click **Save**. The **Family Issuance Members** grid on the **Issue Food Instruments** screen is updated and displays the status of the benefits printed.

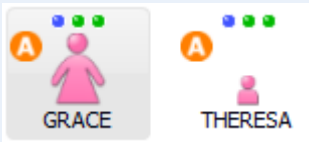
Task B. Issuing Family Benefits Prior to the Family Issuance Day

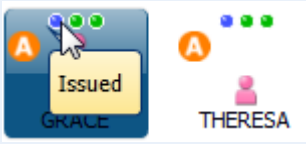
Complete the following steps to perform this task:

1. Access (or open) a family record. The **Family Demographics** screen displays.

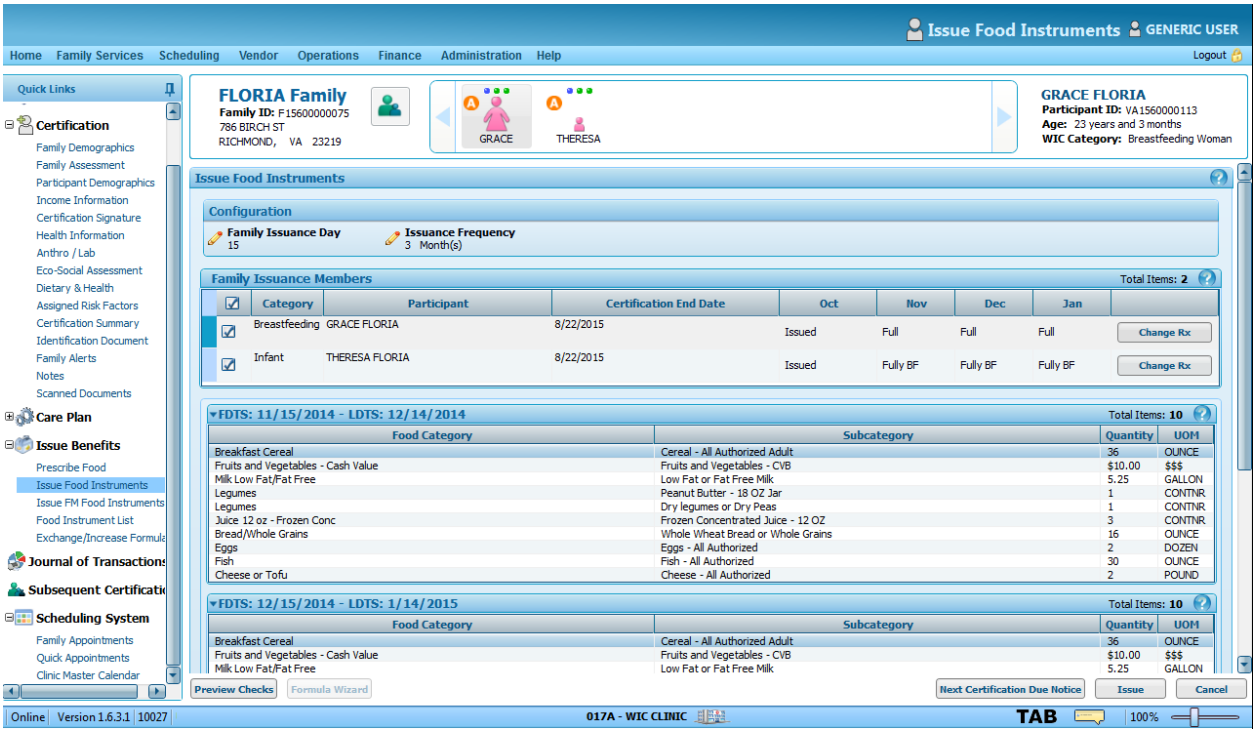


Notice the status of the benefits displayed on each icon. In this example, the current month benefits have been issued already (blue dots) and the 2nd and 3rd month are available for issuance (green dots).





2. Go to **Quick Links → Issue Benefits → Issue Food Instruments**. The **Issue Food Instruments** screen displays.



Notice the information displayed within the Configuration container. The Family Issuance Day is set to the 15th of the month.

Assume:

The current system date (today's date) is the 12th of the month (three days prior to the Family Issuance Day).

The system has been configured to allow issuance of the next set of benefits up to 30 days in advance of the Family Issuance Day (Manage System Settings screen / Operations (Food section) / Number of days prior to FDTS to Issue Benefits value).

The Issuance Frequency of the family is set to 3 Month(s).

The Certification End Dates of each member does not limit the issuance of three (3) additional months.

With these conditions, the Family Issuance Members grid displays four (4) months of benefits for the family. The first month is in an Issued status and the next 3 months are available for issuance

and set to Full (not prorated).

Total Items: 2

Oct	Nov	Dec	Jan	
Issued	Full	Full	Full	Change Rx
Issued	Fully BF	Fully BF	Fully BF	Change Rx

The example above illustrates benefits for a fully breastfeeding woman and her fully breastfed infant which is why “Fully BF” is displayed in the second row of the grid for the months of Nov, Dec, and Jan.

3. View the benefits displayed below.

FDTS: 11/15/2014 - LDTS: 12/14/2014 — Total Items: 10

Food Category	Subcategory	Quantity	UOM
Breakfast Cereal	Cereal - All Authorized Adult	36	OUNCE
Fruits and Vegetables - Cash Value	Fruits and Vegetables - CVB	$10.00	$$$
Milk Low Fat/Fat Free	Low Fat or Fat Free Milk	5.25	GALLON
Legumes	Peanut Butter - 18 OZ Jar	1	CONTNR
Legumes	Dry legumes or Dry Peas	1	CONTNR
Juice 12 oz - Frozen Conc	Frozen Concentrated Juice - 12 OZ	3	CONTNR
Bread/Whole Grains	Whole Wheat Bread or Whole Grains	16	OUNCE
Eggs	Eggs - All Authorized	2	DOZEN
Fish	Fish - All Authorized	30	OUNCE
Cheese or Tofu	Cheese - All Authorized	2	POUND

FDTS: 12/15/2014 - LDTS: 1/14/2015 — Total Items: 10

Food Category	Subcategory	Quantity	UOM
Breakfast Cereal	Cereal - All Authorized Adult	36	OUNCE
Fruits and Vegetables - Cash Value	Fruits and Vegetables - CVB	$10.00	$$$
Milk Low Fat/Fat Free	Low Fat or Fat Free Milk	5.25	GALLON
Legumes	Peanut Butter - 18 OZ Jar	1	CONTNR
Legumes	Dry legumes or Dry Peas	1	CONTNR
Juice 12 oz - Frozen Conc	Frozen Concentrated Juice - 12 OZ	3	CONTNR
Bread/Whole Grains	Whole Wheat Bread or Whole Grains	16	OUNCE
Eggs	Eggs - All Authorized	2	DOZEN
Fish	Fish - All Authorized	30	OUNCE
Cheese or Tofu	Cheese - All Authorized	2	POUND

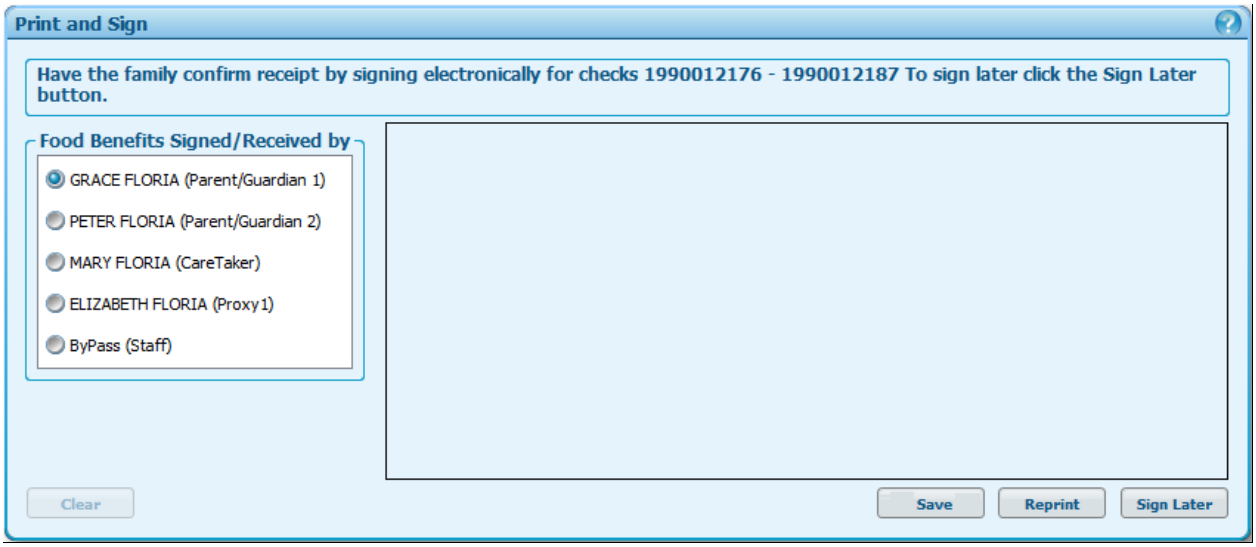
FDTS: 1/15/2015 - LDTS: 2/14/2015 — Total Items: 10

Food Category	Subcategory	Quantity	UOM
Breakfast Cereal	Cereal - All Authorized Adult	36	OUNCE
Fruits and Vegetables - Cash Value	Fruits and Vegetables - CVB	$10.00	$$$
Milk Low Fat/Fat Free	Low Fat or Fat Free Milk	5.25	GALLON
Legumes	Peanut Butter - 18 OZ Jar	1	CONTNR
Legumes	Dry legumes or Dry Peas	1	CONTNR
Juice 12 oz - Frozen Conc	Frozen Concentrated Juice - 12 OZ	3	CONTNR

eview Checks | Formula Wizard | Next Certification Due Notice | Issue | Cancel

In the example above, three (3) future months of benefits are displayed and can be issued to the family.

4. Check (or uncheck) rows in the **Family Issuance Members** grid as necessary to select the family members for benefit issuance. The grid is updated and displays your current selections.
5. Click **Issue** to issue/print food instruments to the selected family members. The **Print and Sign** screen displays.



6. Select the individual signing for the benefits in the **Food Benefits Signed/Received by** radio button group box.
7. Direct the individual to sign the electronic signature pad and then click **Save**. The **Food Instrument List** screen displays.

Task C. Issuing Family Benefits Prior to the Family Issuance Day (Additional Examples)

Complete the following steps to perform this task:

1. Assume the following for each example provided below:
   - The current month of benefits is in an Issued status for all members of the household eligible to receive food benefits.
   - The Issuance Frequency of the family is set to 3 Month(s).
   - The configuration setting 'Number of days prior to FDTS to Issue Benefits' is set to 15.
2. Review the following examples:
   - Example 1

A participant (only person in the household on WIC) has a Family Issuance Day of "7" and has benefits that go to 1/6/2014. The participant returns to the clinic on 1/2/2014 (5 days prior to their next FDTS) for additional food benefit issuance. The Issue Food Instruments screen will display four months in the Family Issuance Members grid. The following are the months that will be displayed and the status of the month based on the information provided in the example:

Dec and the status is Issued

Jan and the status is Full (available)

Feb and the status is Full (available)

Mar and the status is Full (available)

   - Example 2

A participant is initially certified on 12/7/2013 into a family with no existing family members and the family issuance day is not changed from the system suggested "7". When a user navigates to the Issue Food Instruments screen in the Family Issuance Members container only 3 issuance months will be displayed. The following are the months that will be displayed and the status of the month based on the information provided in the example::

Dec and the status is Full (available)

Jan and the status is Full (available)

Feb and the status is Full (available)

- Example 3

A participant is certified into a family that has other household members with food benefits issued. The Family Issuance Day is “7” and the household members have benefits issued to them through 1/6/2014. The new participant is certified on 12/20/2013 (17 days before the next FDTS for the family). When the user navigates to the Issue Food Instruments screen the Family Issuance Members container will only show three months as not all family members have a status of Issued in the current issuance month and the family members are outside of the configurable setting. The following are the months that will be displayed and the status of the month based on the information provided in the example:

Dec and two statuses will display: Issued will display for family members that have been issued current month benefits and the prorated benefit will display for the newly certified participant

Jan and the status is Full (available) for all family members

Feb the status is Full (available) for all family members

- Example 4

A participant or family has a Family Issuance Day of “7” and the next FDTS should have started on 1/7/2014 but the benefits are not issued until 1/20/2014 (receives the current month benefits after the FDTS). When the user navigates to the Issue Food Instruments screen only three issuance months will display in the Family Issuance Members container. The following are the months that will be displayed and the status of the month based on the information provided in the example:

Jan will display and the status will be the prorated quantity of the food benefit

Feb will display and the status is Full

Mar will display and the status is Full

- Example 5

A participant (only member in the household on WIC) has a Family Issuance Day of “7” and has benefits issued for December (12/7/2013-1/6/2014), January (1/7/2014-2/6/2014) and February (2/7/2014-3/6/2014). The participant returns to the clinic on January 28, 2014. Since the participant is outside of the configurable number of days and their next month is in ‘Issued’ status, only 3 issuance months will be displayed. The following are the months that will be displayed and the status of the month based on the information provided in the example:

January will display and the status is Issued

February will display and the status is Issued

March will display and the status is Full (Note: This month could be issued to the participant – current system functionality)

Congratulations!

You have successfully completed the **Issue Food Instruments** process.

Issue Food Instruments: Formula Wizard

The **Formula Wizard** is used to issue formula from current on-site inventory, including exempt formula in on site inventory, or from an inventory warehouse. The **Formula Wizard** screen displays automatically when issuing food instruments for current months benefits that contains a formula that is currently in on-site inventory. The first screen of the **Formula Wizard** allows you to issue from current on-site inventory on hand and the second screen of the wizard allows you to issue from the formula warehouse.

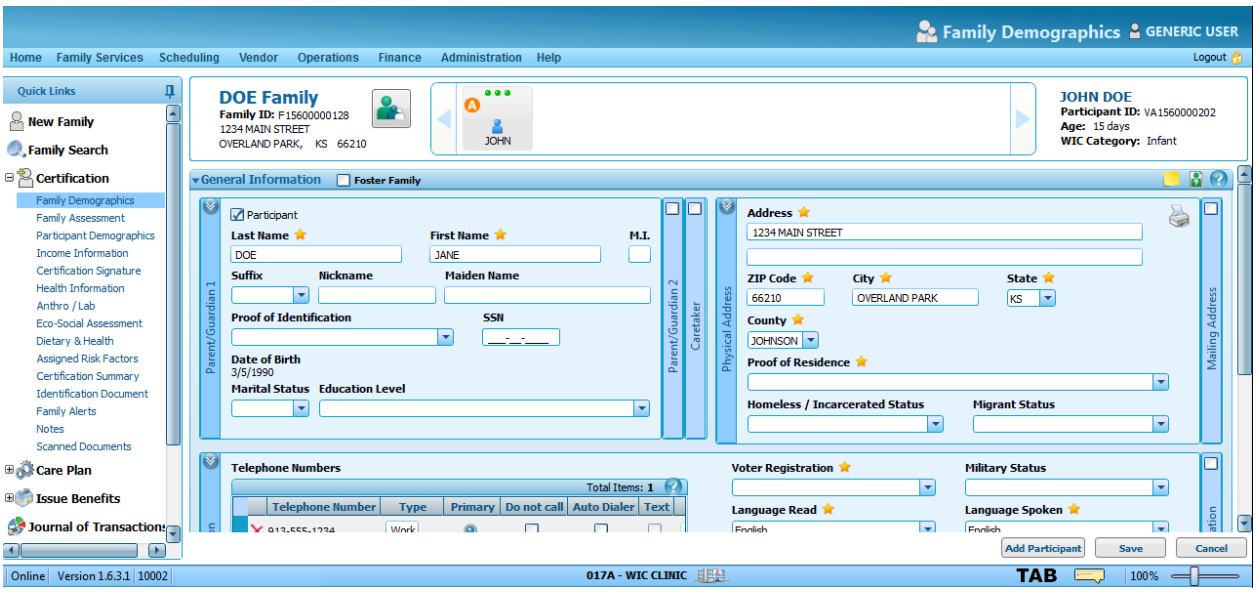
This process includes the following tasks:

Task A. Using the Formula Wizard **8-50**

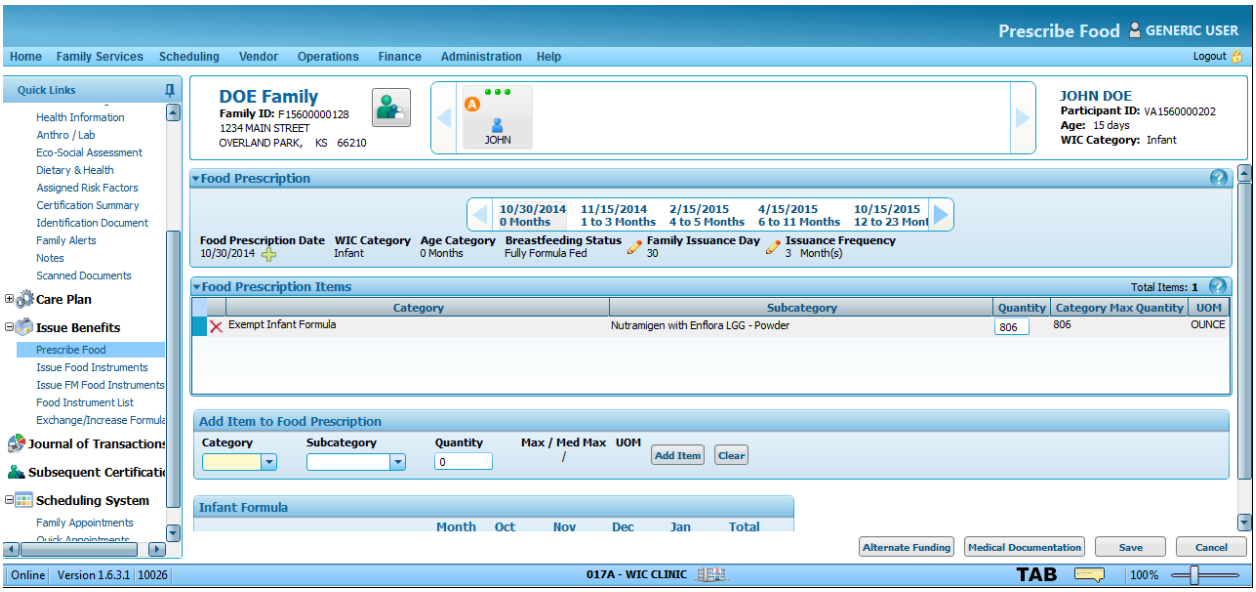
Task A. Using the Formula Wizard

Complete the following steps to perform this task:

1. Access (or open) a family record for an infant with a food package containing an infant formula category item, an exempt item, or a WIC-eligible medical food that is currently on hand within the local inventory or needs to be ordered from the formula warehouse. The **Family Demographics** screen displays.

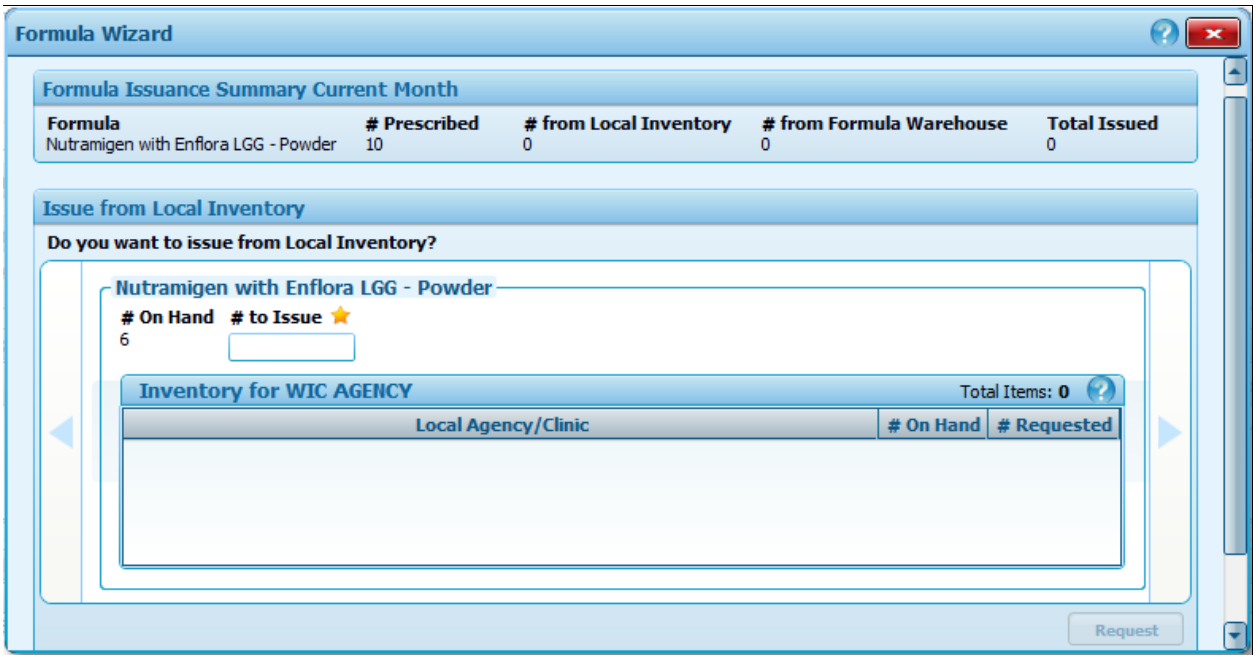


2. Go to **Quick Links → Issue Benefits → Prescribe Food**. The **Prescribe Food** screen displays.



This step is listed to confirm that a prescription for an infant formula, an exempt infant formula, or a medical food has been prescribed to the infant.

3. Go to **Quick Links → Issue Benefits → Issue Food Instruments**. The **Formula Wizard** screen displays.



Clicking Save on the Prescribe Food screen displays the Issue Food Instruments screen as well.

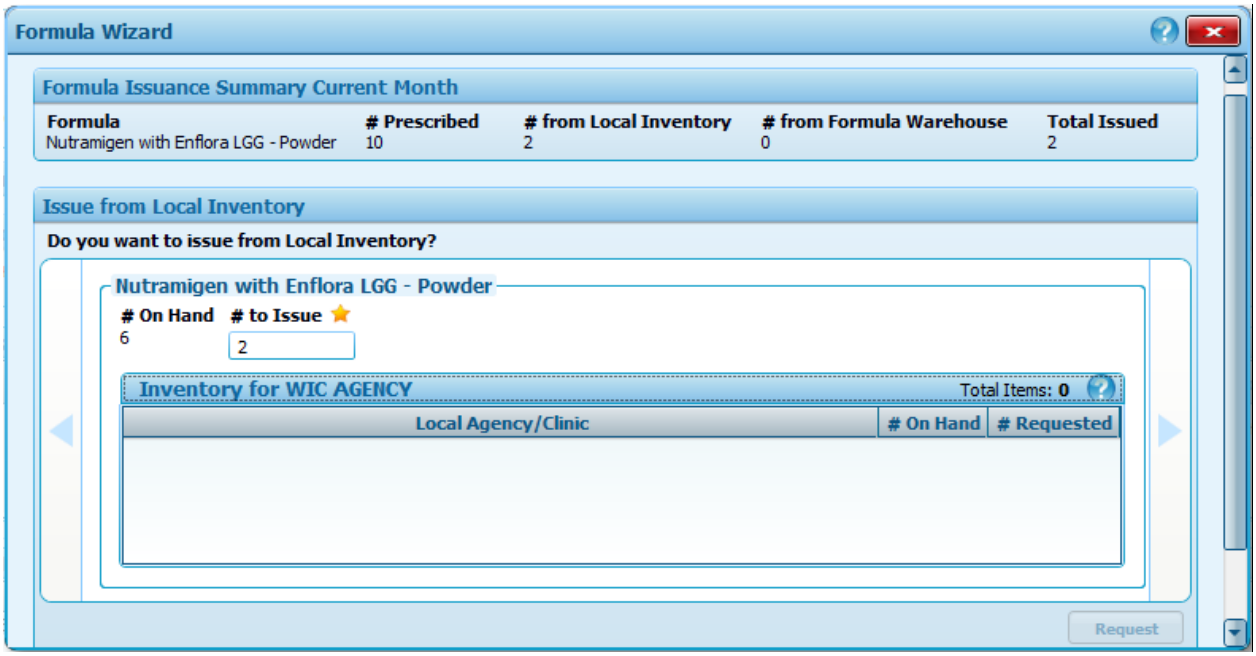
The Formula Wizard screen displays automatically when issuing food instruments for an infant with a food prescription containing a formula item that is on hand in the local clinic inventory. If the prescribed formula item is not on hand in the local clinic inventory and the formula needs to be ordered from the formula warehouse, click the Formula Wizard button on the Issue Foods Instruments screen to display the Formula Wizard screen.

If the Formula Wizard screen is dismissed either intentionally or by mistake, you can display the Formula Wizard screen again by clicking the Formula Wizard button on the Issue Food Instruments screen.

The Formula Issuance Summary container displays the name of the formula prescribed to the infant, the number of cans prescribed, the number of cans to be issued from the local clinic inventory (defaults to 0 cans), the number of cans to be issued from the formula warehouse (defaults to 0 cans), and the total number of cans to be issued (cans from the local clinic inventory + cans from the formula warehouse).

4. The first screen of the wizard enables a user to issue formula from the local clinic inventory (assuming formula is on hand). To issue formula from the local clinic inventory, enter the number

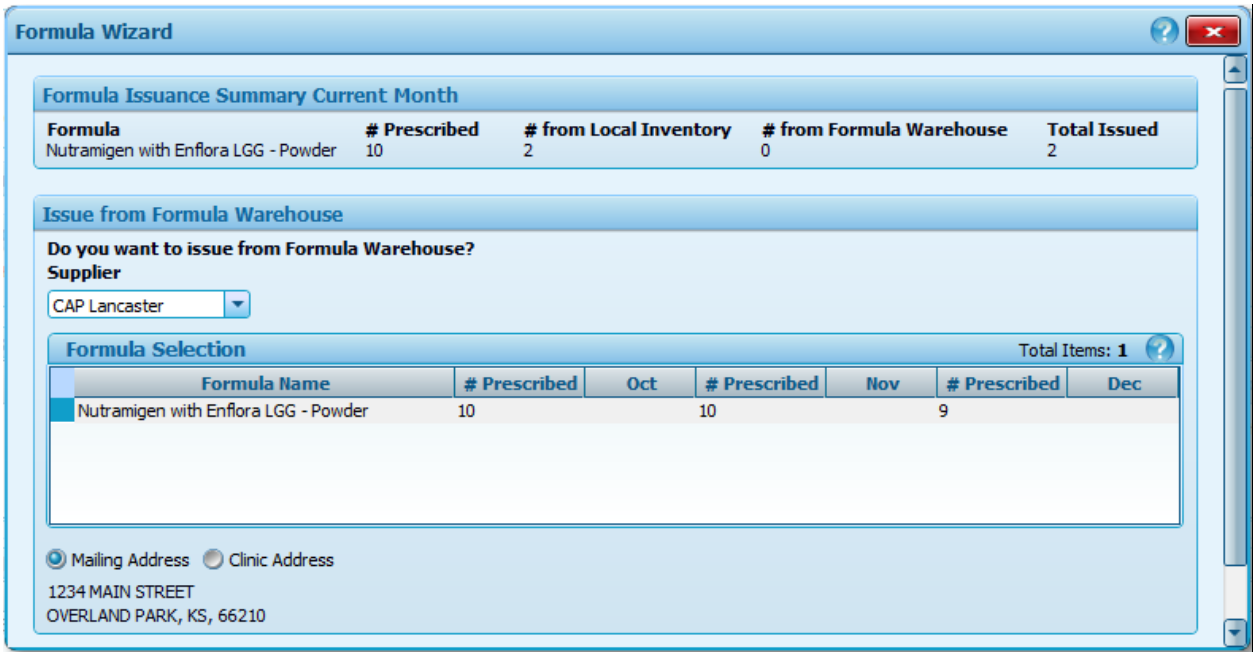
of cans to issue in # **to Issue**. (If you do not want to issue formula from the local clinic inventory, leave # **to Issue** blank and focus on the steps that apply to the second screen of the wizard.)



Once the user enters a value into the number to Issue field, the Formula Issuance Summary container updates accordingly.

The Inventory for WIC Agency grid displays the inventory of other local agencies/clinics having the same type of formula on hand. In the example above, no other clinics are listed as having the same type of formula selected for this infant.

5. Click **Next**. The second screen of the wizard displays. (Steps are specific to issuing from the formula warehouse.)

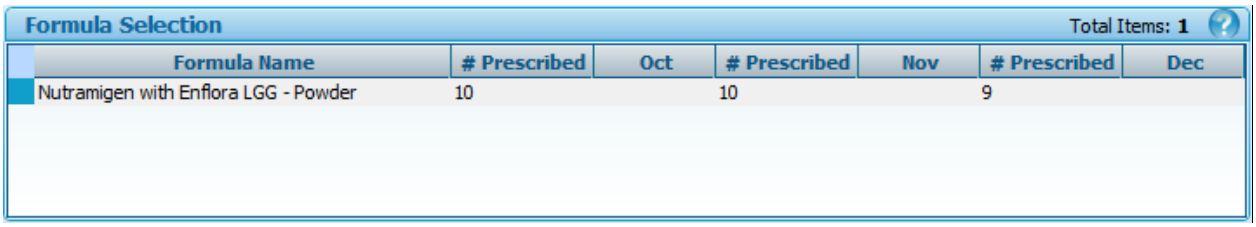


If you chose to issue formula from the current on-site inventory, the # from Local Inventory under Formula Issuance Summary displays the number of units entered. If you chose not to issue formula from the current on-site inventory, the # from Local Inventory displays a zero.

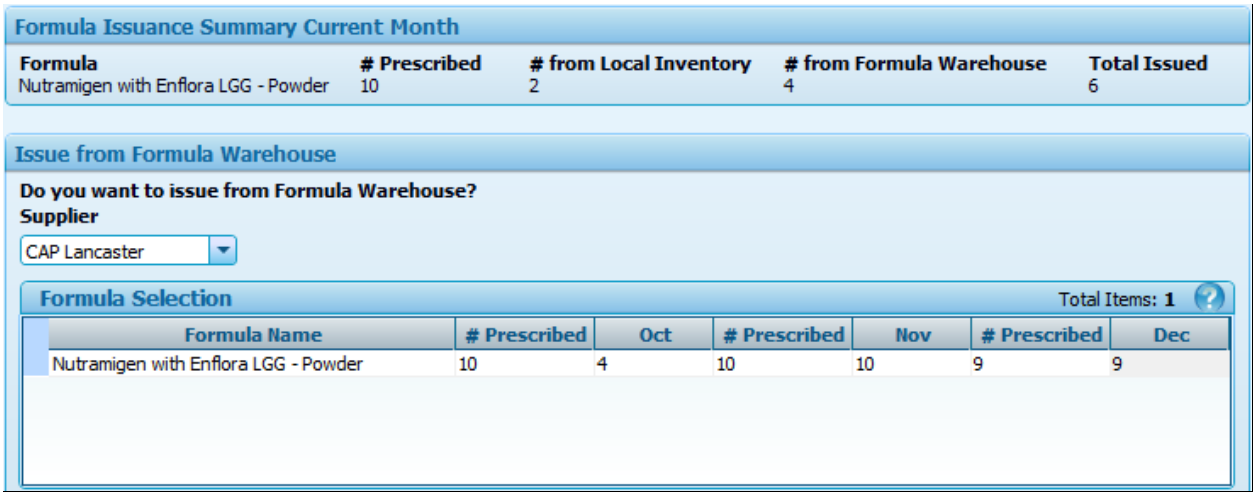
The Issue from Formula Warehouse section allows you to issue formula from the formula warehouse. In this section, you can select a supplier from the drop-down list and the items available for the selected supplier are displayed in the Formula Selection grid.

The Formula Selection grid displays the Formula Name and the # Requested for each formula item currently available for the selected supplier.

6. To issue formula from a formula warehouse, select a **Supplier** in the drop-down list. The screen refreshes and displays the items available for the selected supplier in the Formula Selection grid.

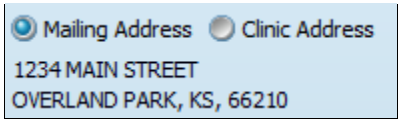


7. In the **Name of Month (i.e. Oct, Nov, and Dec)** column of the **Formula Selection** grid, enter the number of items to issue from the selected supplier.

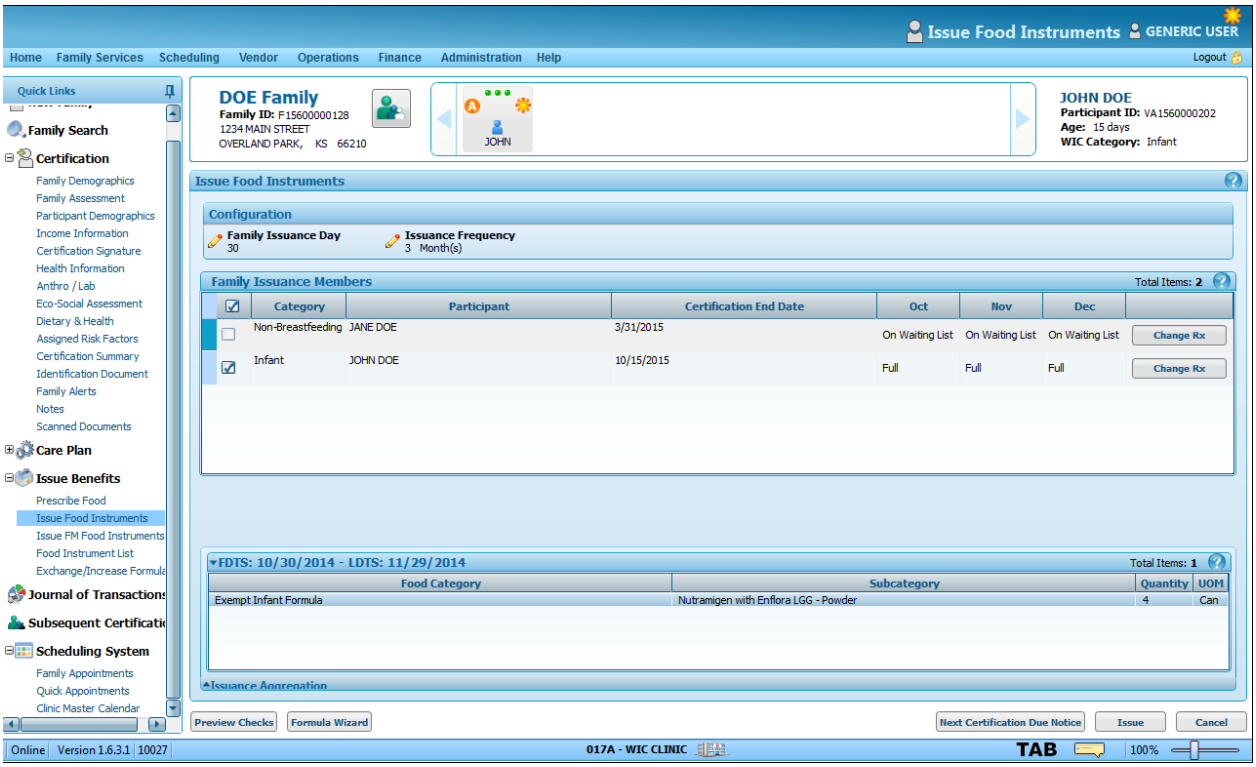


In the example above, it has been determined that two (2) cans of formula is to be issued from the local clinic inventory and four (4) cans of formula is to be ordered from the formula warehouse (2 + 4 = 6). The remaining four (4) cans (10 – 6 = 4) of prescribed formula are issued on a food instrument (or sent to the EBA).

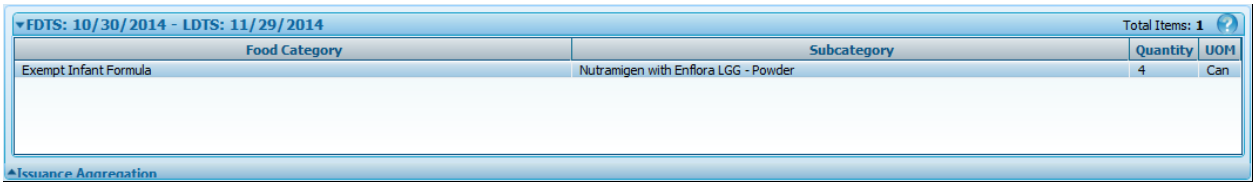
8. Select the **Mailing Address** radio button to ship the formula item directly to the participant's mailing address, or select the **Clinic Address** radio button to ship the formula item to the clinic. The **Mailing Address** radio button is selected as the default.



9. Click **Next**. The wizard is closed and the **Issue Food Instruments** screen displays and the formula item displays in the **FDTS** grid.

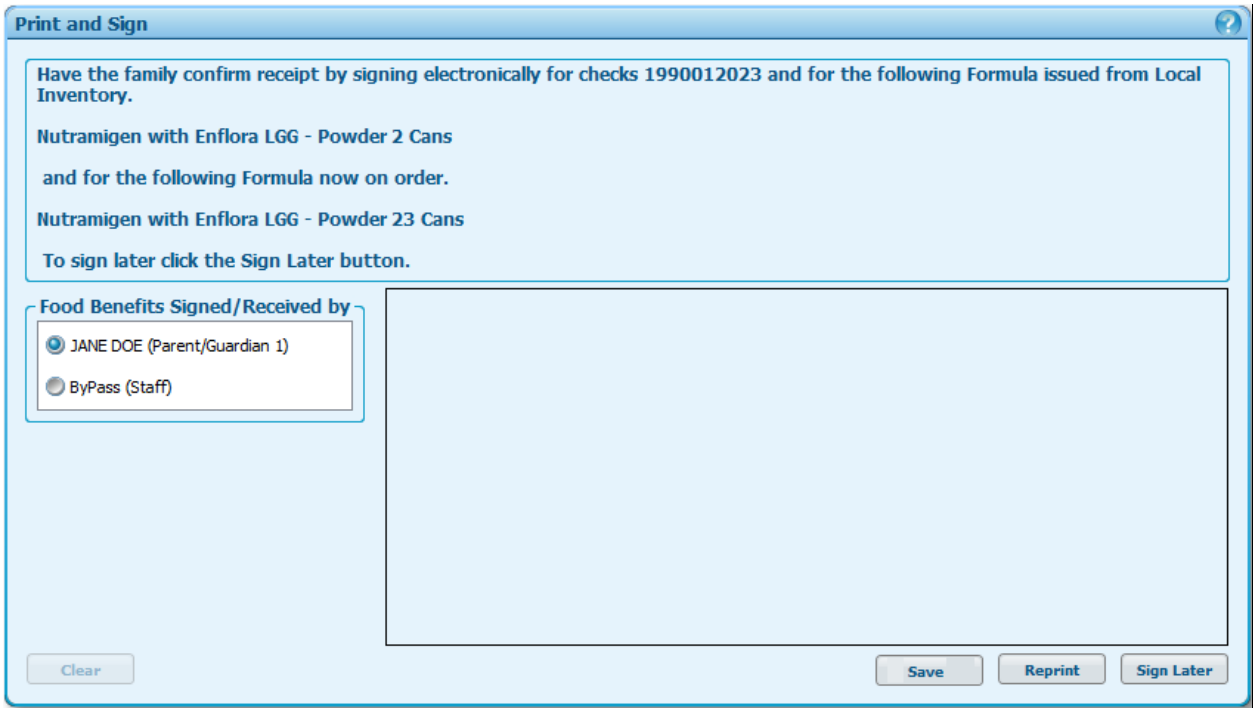


- Benefits to be Issued on Food Instruments (or sent to the EBA)



In the example above, four (4) cans of formula will be issued on a food instrument (or is sent to the EBA).

10. Click **Issue** to issue benefits. The **Print and Sign** screen displays.



In the example above, Jane Doe (Parent/Guardian 1) is signing for the following:

one food instrument listing four (4) cans of formula

two (2) cans of formula from the local clinic inventory

a total of 23 cans of formula that is being ordered from the formula warehouse (4 cans for October, 10 cans for November, and 9 cans for December = 23 cans total)

11. Select the appropriate radio button that indicates the name of the individual signing for the benefits under **Food Benefits Signed/Received by**.

12. Direct the individual to sign the electronic signature pad and click **Save**. The **Issue Food Instruments** screen refreshes and the **Family Issuance Members** grid displays the status of the benefits printed.

Congratulations!

You have successfully completed the **Issue Food Instruments: Formula Wizard** process.

Issue Food Instruments: Changing the Benefit Issuance Frequency of a Family

The following scenario will guide you through changing the issuance frequency of a family. This may occur due to a change in the participant's personal situation or health status. This task also allows you to place all family members on the same check pick-up schedule.

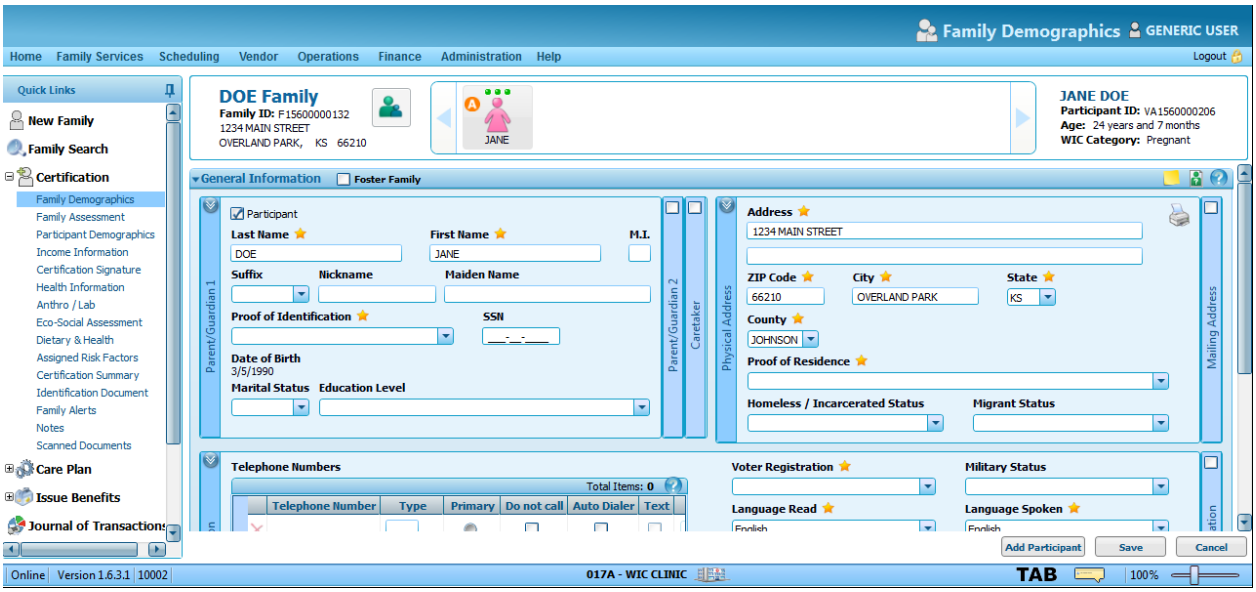
This process includes the following task(s):

Task A. Changing the Benefit Issuance Frequency of a Family 8-58

Task A. Changing the Benefit Issuance Frequency of a Family

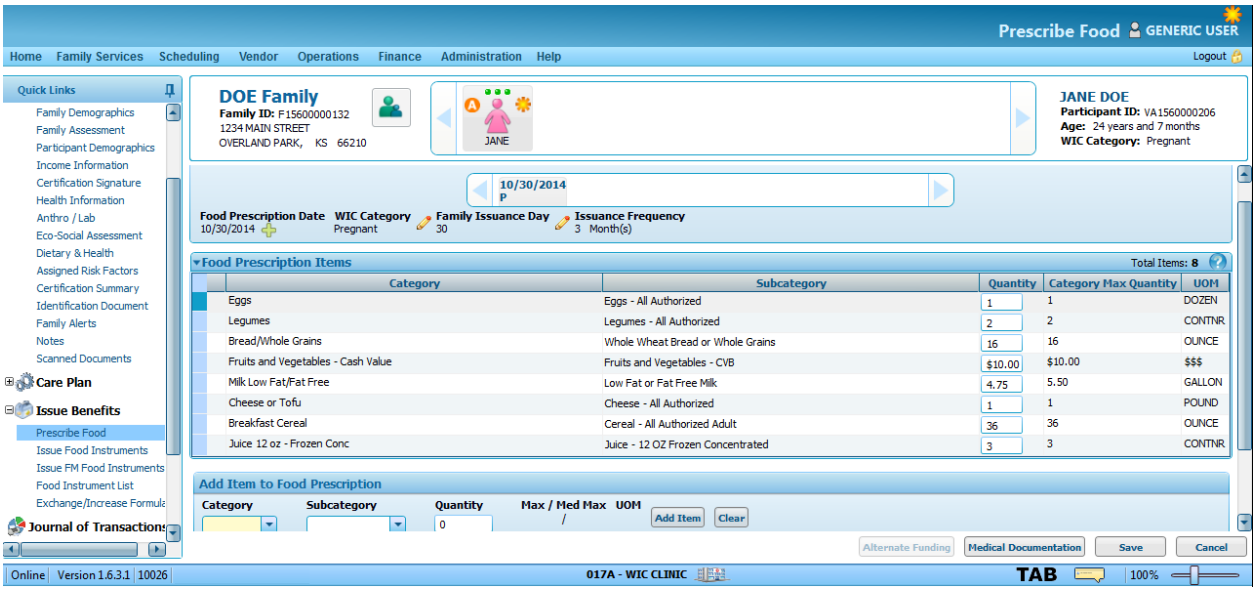
Complete the following steps to perform this task:

1. Access or open a family record that is ready to have benefits issued.



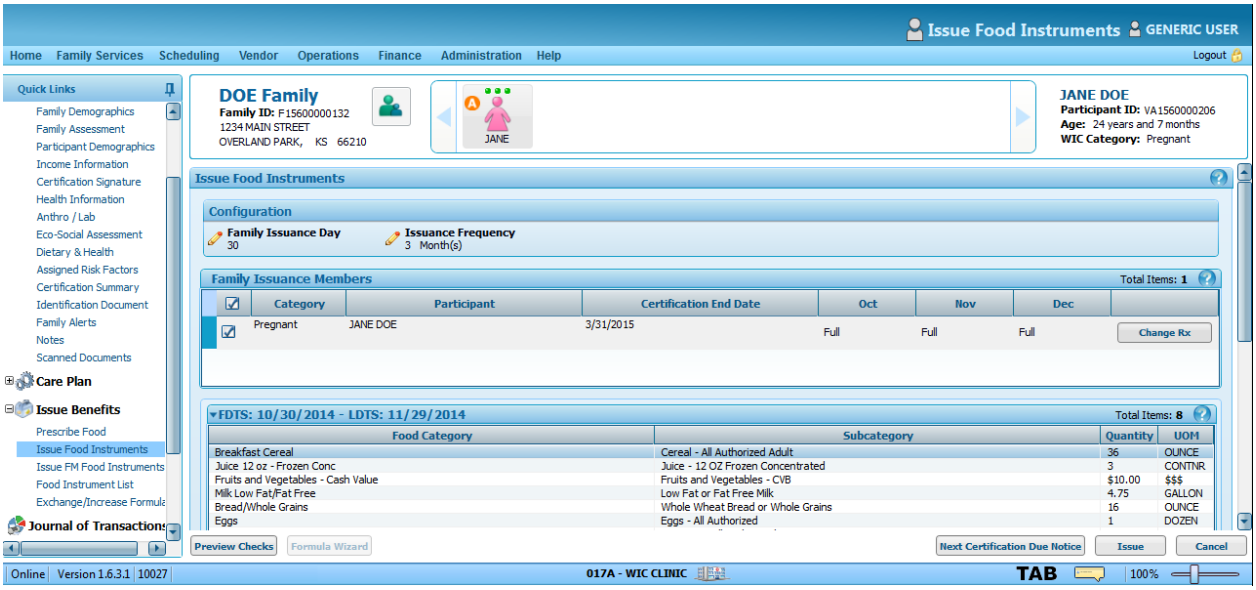
2. Do one of the following:

   - Go to **Quick Links → Issue Benefits → Prescribe Food**. The **Prescribe Food** screen displays.

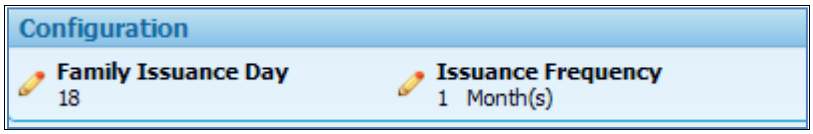


Navigate to this screen if a food prescription has not been added for one or more members.

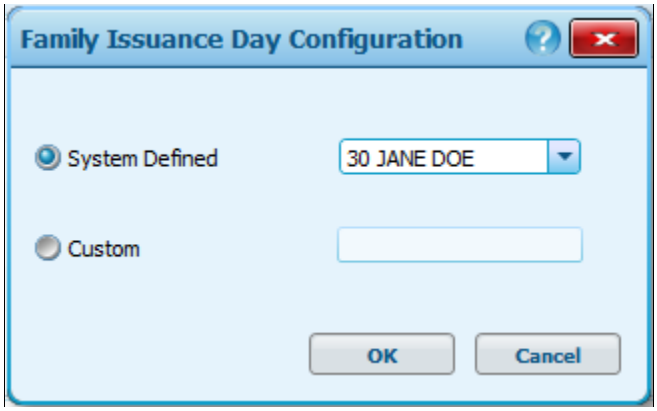
- Go to **Quick Links → Issue Benefits → Issue Food Instruments**. The **Issue Food Instrument** screen displays.



3. Go to **Issuance Frequency** within the **Configuration** group box.

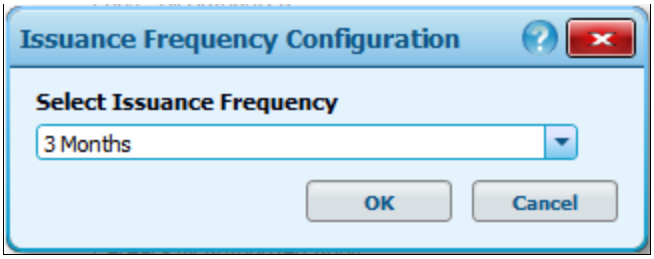


4. Click on the **Edit** button ( ) to edit a family issuance day. The **Family Issuance Day Configuration** screen displays.

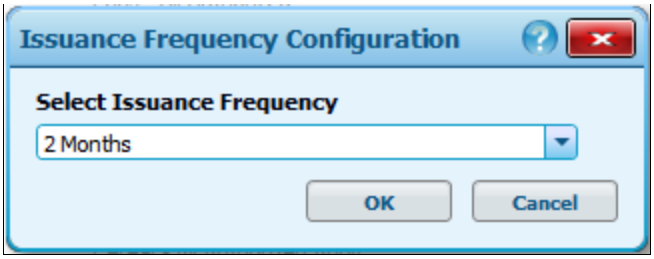


- Select the **System Defined** radio button to enable the system determine the issuance day or select the **Custom** radio button and enter a customized day of the month (i.e. – 10, 15, 31, etc.). Click **OK** to process the screen.

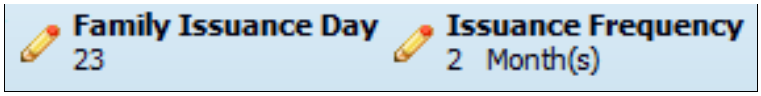
5. Click on the **Edit** button ( ) to edit an issuance frequency. The **Family Issuance Day Configuration** screen displays.



- Select the desired **Issuance Frequency** from the drop down list box and then click **OK**.



6. View the updated values on the screen.



Congratulations!

You have successfully completed the **Issue Food Instruments: Changing the Benefit Issuance Frequency of a Family** process.

Issue Food Instruments: Working with Prorated Food Packages

If a new participant is added to a family who has an established family issuance date, the Crossroads system will automatically prorate a food package if a full month's issuance is not possible.

This scenario assumes that all participants in the family have been certified and assigned a food package. The family and/or the new participant are ready to have benefits issued.

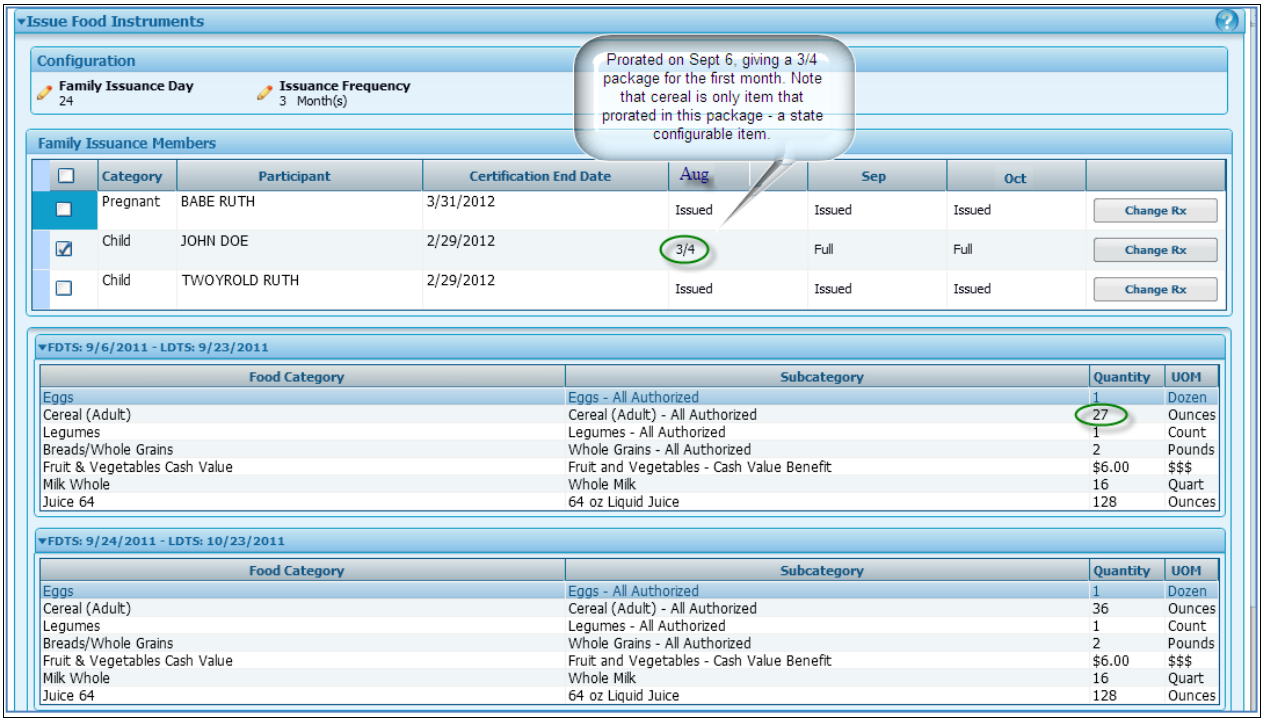
This process includes the following task(s):

Task A. Issuing Benefits to a New Member when the Family Issuance Day is Beyond the Date of New Issuance.....8-62

Task A. Issuing Benefits to a New Member when the Family Issuance Day is Beyond the Date of New Issuance

Complete the following steps to perform this task:

1. Search and access a family record with a newly certified member who is ready to have benefits issued.
2. Go to **Quick Links → Issue Benefits → Issue Food Instruments**. The **Issue Food Instruments** screen displays.
3. Within the **Family Issuance Members** grid, select the new member to be issued benefits.



Here is the screen shot of the ¾ proration for the first month and the one item with proration.

Proration can be set to prorate daily (for formula), or for three or four periods (for milk and other foods) on the monthly cycle, configurable at the state level. See the tables below for proration food such as milk. The second and third months of benefits (if issued) will be full, indicating no proration.

Here is a chart showing the partial month proration issuance in fourths, for example milk:

Number of Days between Actual First Date to Spend and Last Date to Spend (inclusive) Every 8th day prorate by 1/4	Food Package Size
1 - 7	¼ package
8 – 15	½ package

16 – 23	¾ package
24 – 31	Full package

Here is a chart showing the partial month proration issuance in thirds, for example milk:

Number of Days between Actual First Date to Spend and Last Date to Spend (inclusive) Every 10th day prorate by 1/3	**Food Package Size**
1 – 10	1/3 Package
11 - 19	2/3 package
20 – 31	Full package

4. After confirming the **Issuance Frequency** is correct, click **Issue**. The **Electronic Signature** screen displays requiring a signature to confirm receipt of the newly issued benefits.
5. Click **Save**. The **Issue Food Instruments** screen displays indicating the package has been issued.

When you navigate away from the screen and return the months will indicate Issued.

Congratulations!

You have successfully completed the **Issue Food Instruments: Working with Prorated Food Packages** process.

Issue FM Food Instruments

The following scenario describes the process of issuing farmers market food instruments.

This process includes the following task(s):

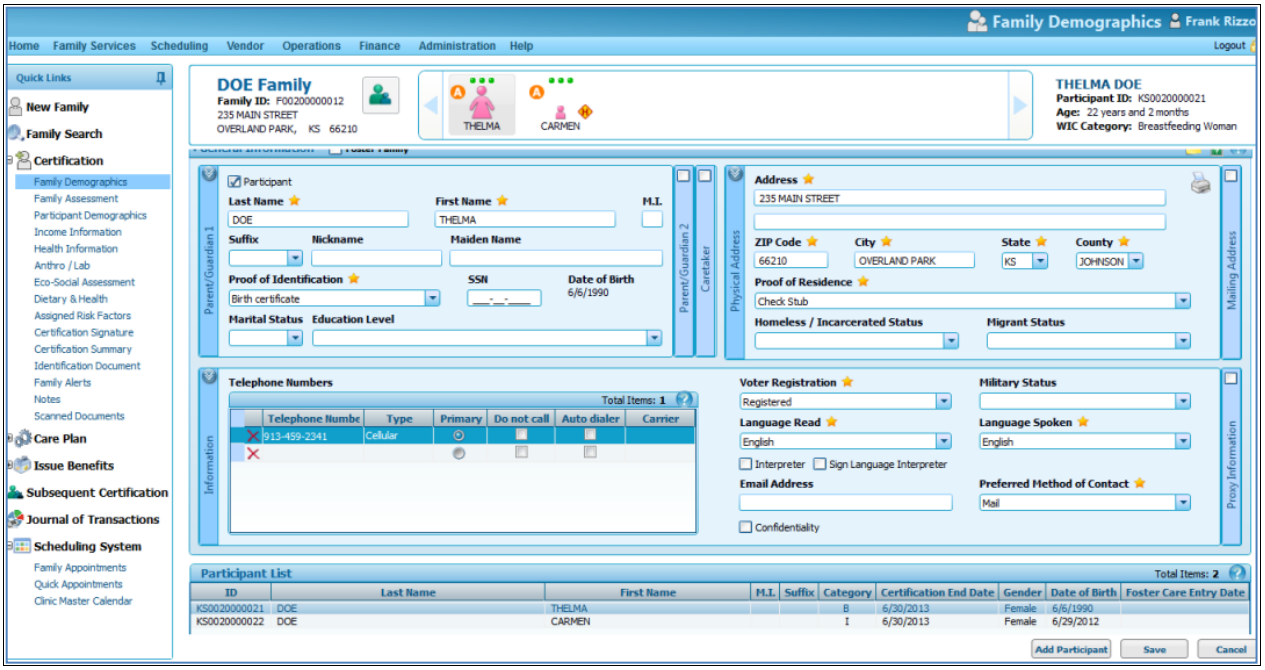
Task A. Issuing Farmers Market Food Instruments 8-65

Task A. Issuing Farmers Market Food Instruments

The **Issue Farmers Market Food Instruments** screen is used to issue farmers market food instruments to eligible individuals for the Farmers Market Nutrition Program (FMNP) season. The option to use Farmers Market Nutrition Program food instruments or booklets of food instrument is a state defined configuration option.

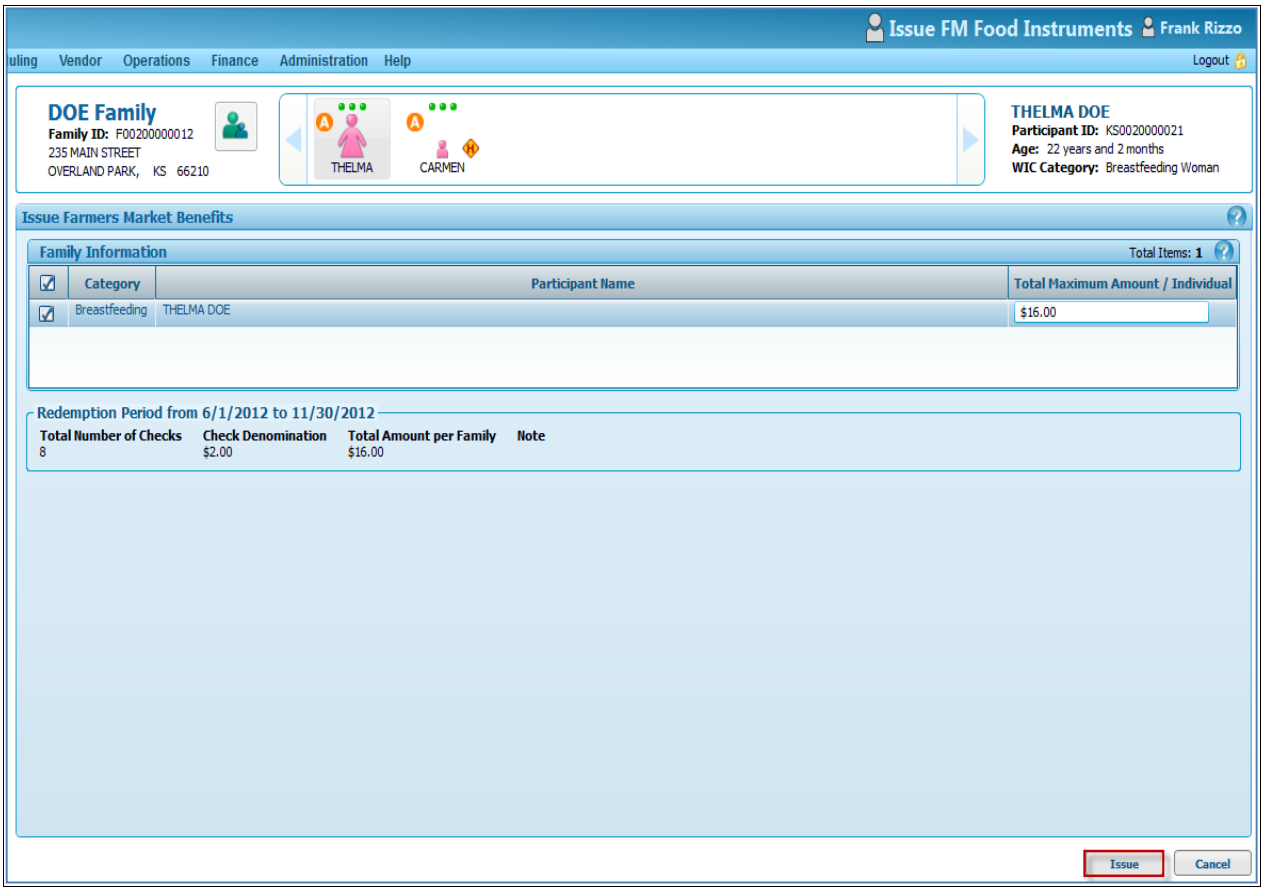
Complete the following steps to perform this task:

1. Search for and access a family record.



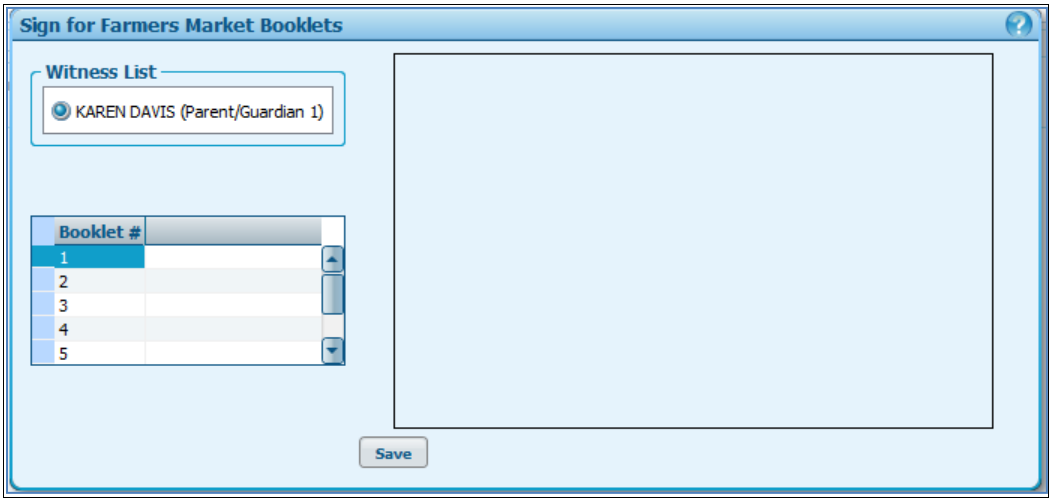
If the system setting '**Utilize Farmers Market**' is not selected, the **Issue FM Food Instruments** in the **Quick Links** menu will not be available for selection.

2. Go to **Family Services → Quick Links → Issue Benefits → Issue FM Food Instruments**. The **Issue FM Food Instruments** screen displays. (In some cases, the application automatically advances to this screen after food instruments have been issued.)

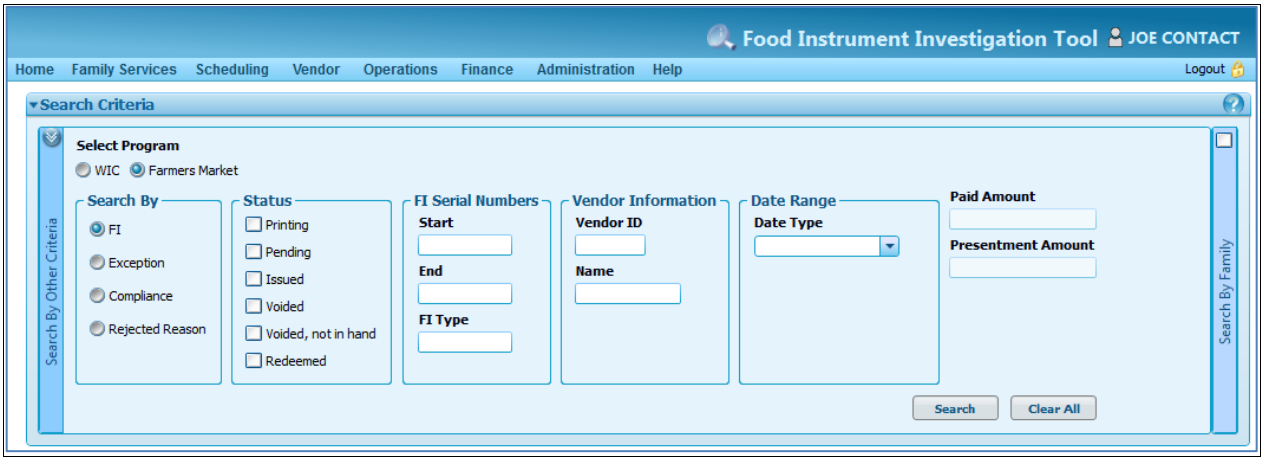


The Family Information container lists each family member and the farmers market Total Maximum Amount/Individual to issue. The user can include or exclude selected individuals. The individual cannot be selected if Farmers Market food instruments have already been issued. Foster children are an economic unit of one and their farmers market benefits are not combined with other family members. The user can reduce the Total Maximum Amount/Individual by the Check Denomination value.

3. Click **Issue**. The **Sign for Farmers Market Booklets** screen displays.



4. Have participant sign electronic signature pad.
5. Click **Save**.
6. Go to **Operations → Food Instrument Investigation Tool** to view the farmers' market benefits.
7. Select the **Farmers Market** radio button.



8. Select the options to refine the search criteria.
9. Click **Search**. The screen refreshes and displays the farmers' market benefit details on the **Search Results** grid.

Search Results — Total Items: 18

		Last Name	First Name	Serial #	Status	Vendor ID	Vendor Name	FI Issuance Date	FI Vendor Redemption Date	FI Expiration Date	FI Void Date	FI Type
		REDFILE	SARAH	19	Issued			8/15/2012				
		REDFILE	SARAH	20	Issued			8/15/2012				
		DOE	THELMA	21	Issued			8/15/2012				
		DOE	THELMA	22	Issued			8/15/2012				
		DOE	THELMA	23	Issued			8/15/2012				
		DOE	THELMA	24	Issued			8/15/2012				
		DOE	THELMA	25	Issued			8/15/2012				
		DOE	THELMA	26	Issued			8/15/2012				
		DOE	THELMA	27	Issued			8/15/2012				
		DOE	THELMA	28	Issued			8/15/2012				

Congratulations!

You have successfully completed the **Issue FM Food Instruments** process.

Food Instrument List

The following scenario describes the process of searching for food instruments that have been issued and then selecting food instruments to void or replace.

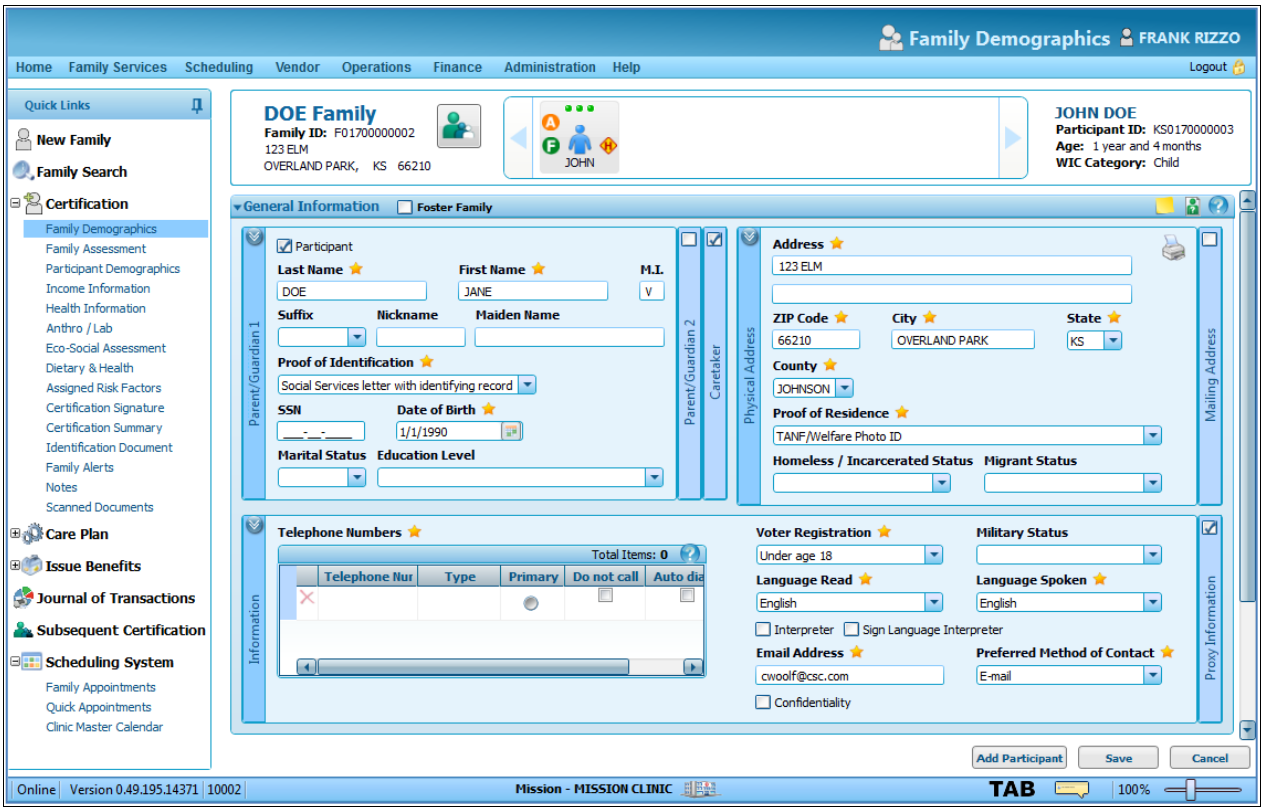
This process includes the following task(s):

Task A. Searching for Food Instruments to Void or Replace 8-70
Task B. Voiding Selected Food Instruments 8-73
Task C. Replacing Selected Food Instruments 8-76

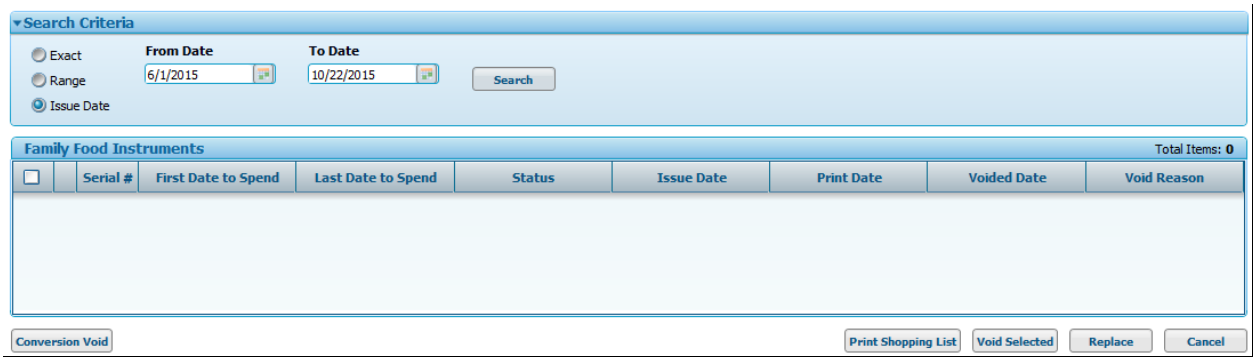
Task A. Searching for Food Instruments to Void or Replace

Complete the following steps to perform this task:

1. Search for and access a family record.



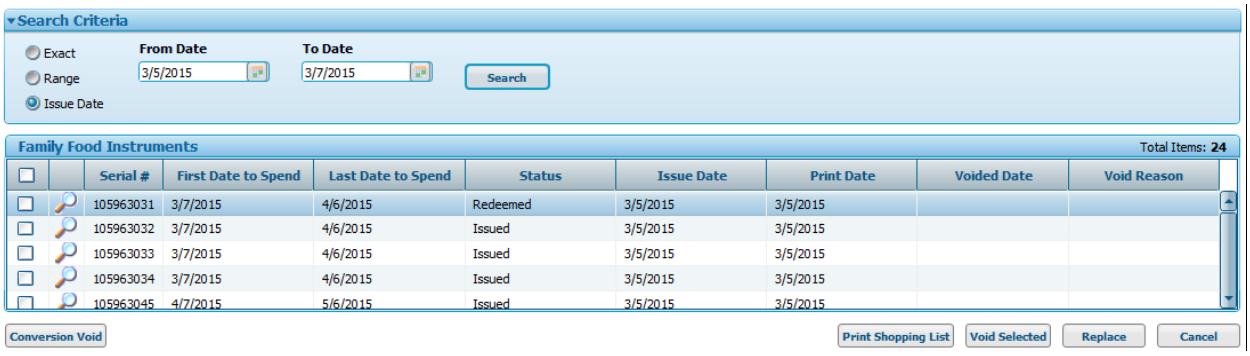
2. Go to **Family Services → Issue Benefits → Food Instrument List**. The **Food Instrument List** screen displays.



3. Under **Search Criteria**, select **Exact**, **Range**, or **Issue Date**.

4. Depending on the search criteria selected, enter either the **Serial #**, **From Serial #** and **To Serial #**, or **From Date** and **To Date**.

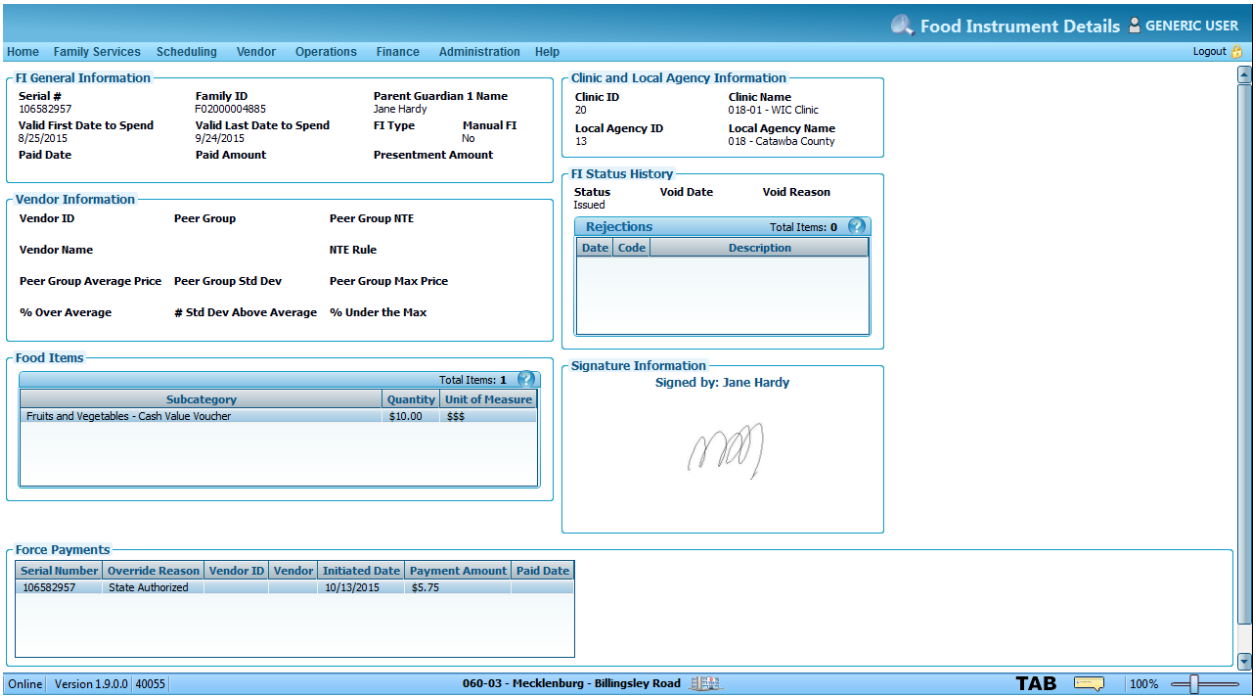
5. Click **Search**. The screen refreshes and displays the results of the search in the **Family Food Instruments** grid.



The Family Food Instruments grid includes the Serial #, First Date to Spend, Last Date to Spend, Status, Issue Date, Print Date, Voided Date, and Void Reason for all food instruments matching the search criteria.

Click a column header to sort the results of the search. Drag and drop columns of information to reorganize the order of the columns in the grid.

6. Click the **View** button ( ) to display the **Food Instrument Details screen**.



7. Review the general information, vendor information, food items, clinic and local agency information, family information, void information, rejection history, force payment history, and signature information on the **Food Instrument Details** screen.
8. Click **Cancel** to return to the **Food Instrument List** screen.
9. Click the **Print Shopping List** button to display the **Shopping List Issued Benefits** report. The report will display the family's current benefits.