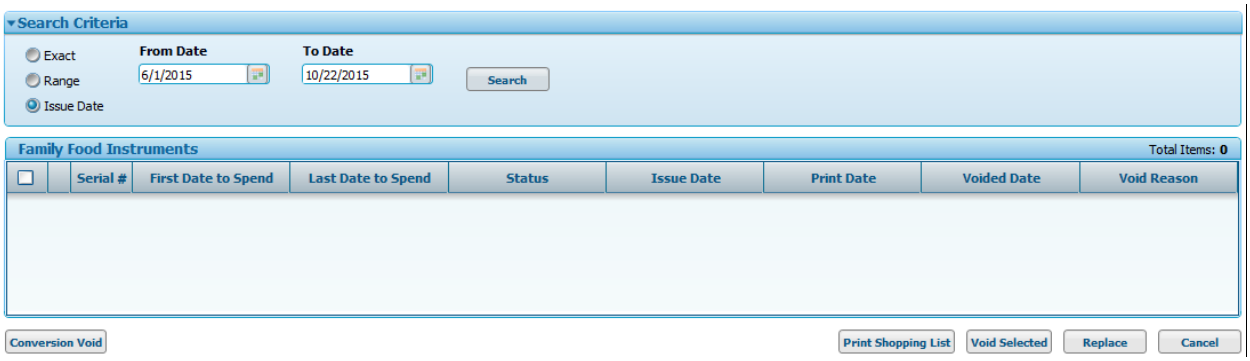
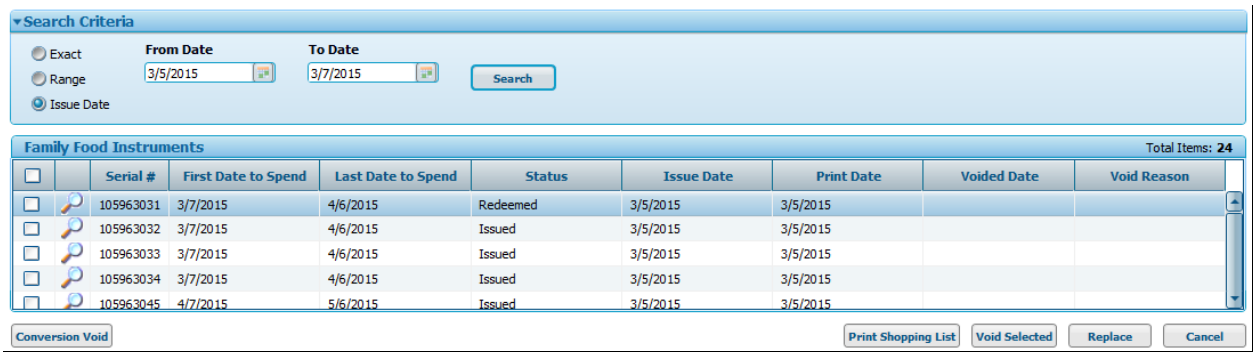
Task B. Voiding Selected Food Instruments

Complete the following steps to perform this task:

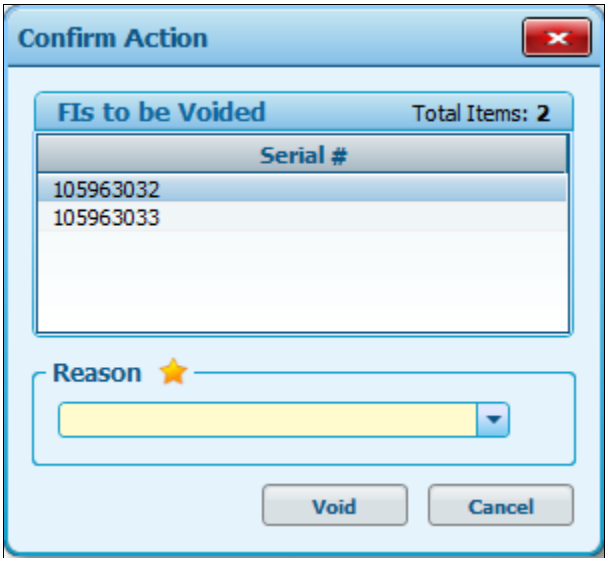
1. Go to **Family Services → Issue Benefits → Food Instrument List**. The **Food Instrument List** screen displays.



2. Under **Search Criteria**, select **Exact**, **Range**, or **Issue Date**.
3. Depending on the search criteria selected, enter either the **Serial #**, **From Serial #** and **To Serial #**, or **From Date** and **To Date**.
4. Click **Search**. The screen refreshes and displays the results of the search in the **Family Food Instruments** grid.

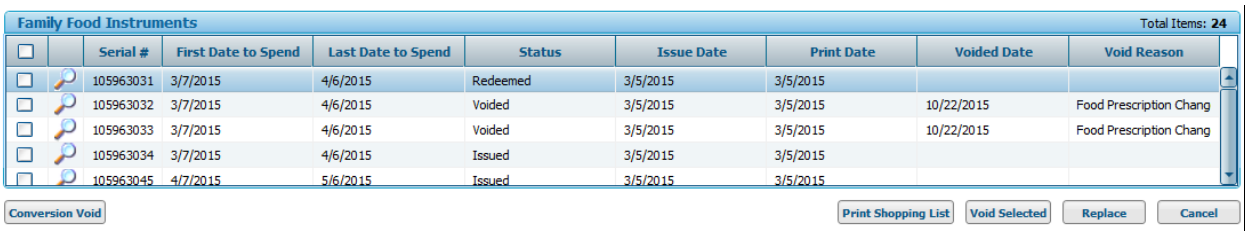


5. Select the check box for all food instruments to be voided.
6. Click **Void Selected**. The **Confirm Action** screen displays.



7. Select the void **Reason** from the drop-down list.

8. Click **Void**. The selected food instruments are voided and the **Food Instrument List** screen refreshes. The **Status**, **Voided Date**, and **Void Reason** columns are updated in the **Family Food Instruments** grid.



Family Food Instruments — Total Items: 24

Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
105963031	3/7/2015	4/6/2015	Redeemed	3/5/2015	3/5/2015		
105963032	3/7/2015	4/6/2015	Voided	3/5/2015	3/5/2015	10/22/2015	Food Prescription Chang
105963033	3/7/2015	4/6/2015	Voided	3/5/2015	3/5/2015	10/22/2015	Food Prescription Chang
105963034	3/7/2015	4/6/2015	Issued	3/5/2015	3/5/2015		
105963045	4/7/2015	5/6/2015	Issued	3/5/2015	3/5/2015		

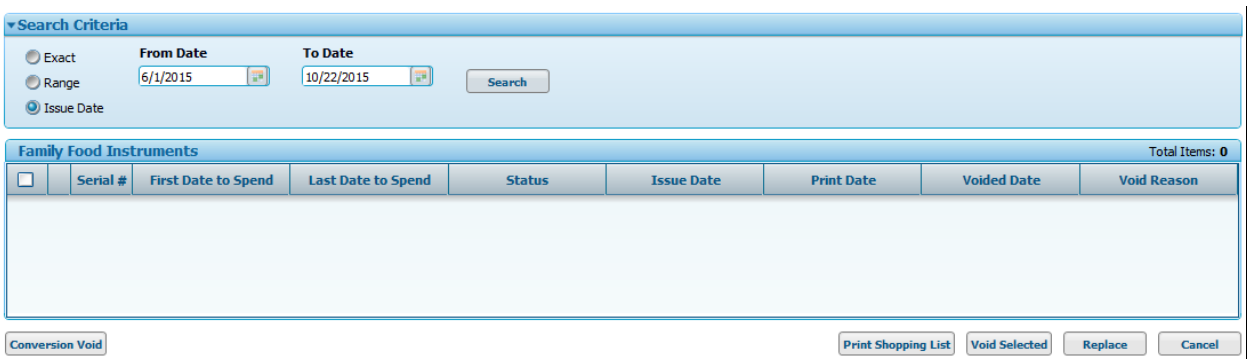
Conversion Void | Print Shopping List | Void Selected | Replace | Cancel

To void a single food instrument, click the View button ( ) to display the Food Instrument Details screen, and then click Void this FI. The Confirm Action screen displays allowing you to select the void reason and void the food instrument in the same manner as above.

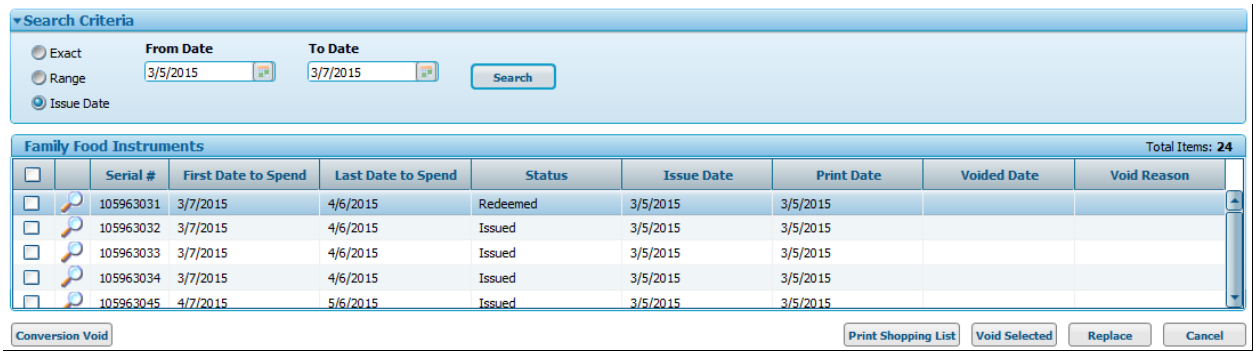
Task C. Replacing Selected Food Instruments

Complete the following steps to perform this task:

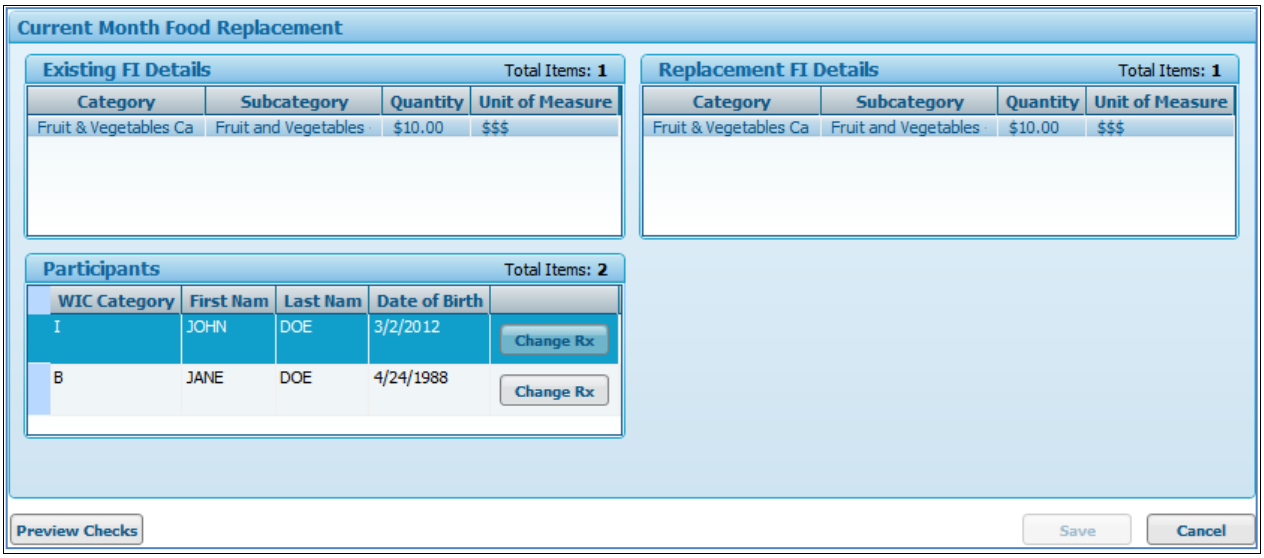
1. Go to **Family Services → Issue Benefits → Food Instrument List**. The **Food Instrument List** screen displays.



2. Under **Search Criteria**, select **Exact**, **Range**, or **Issue Date**.
3. Depending on the search criteria selected, enter either the **Serial #**, **From Serial #** and **To Serial #**, or **From Date** and **To Date**.
4. Click **Search**. The screen refreshes and displays the results of the search in the **Family Food Instruments** grid.



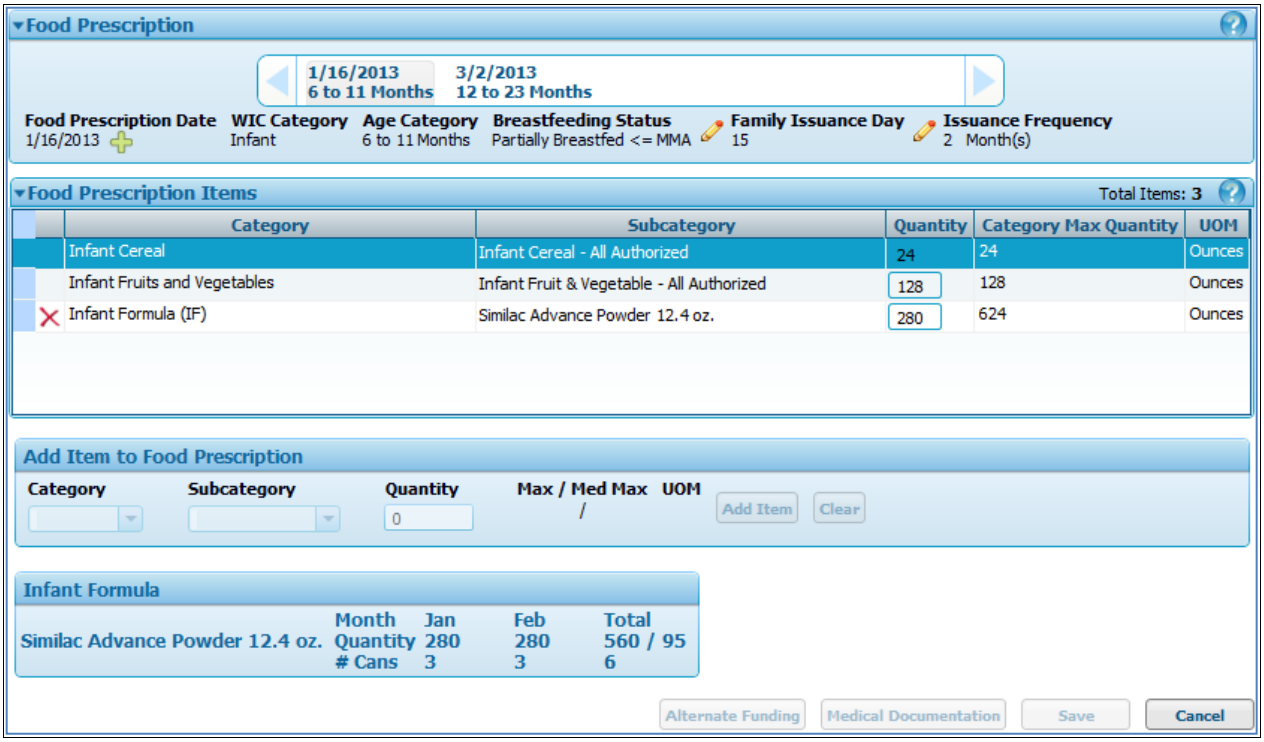
5. Select the check box for all food instruments to be replaced.
6. Click **Replace**. The **Replace Current Benefits** screen displays.



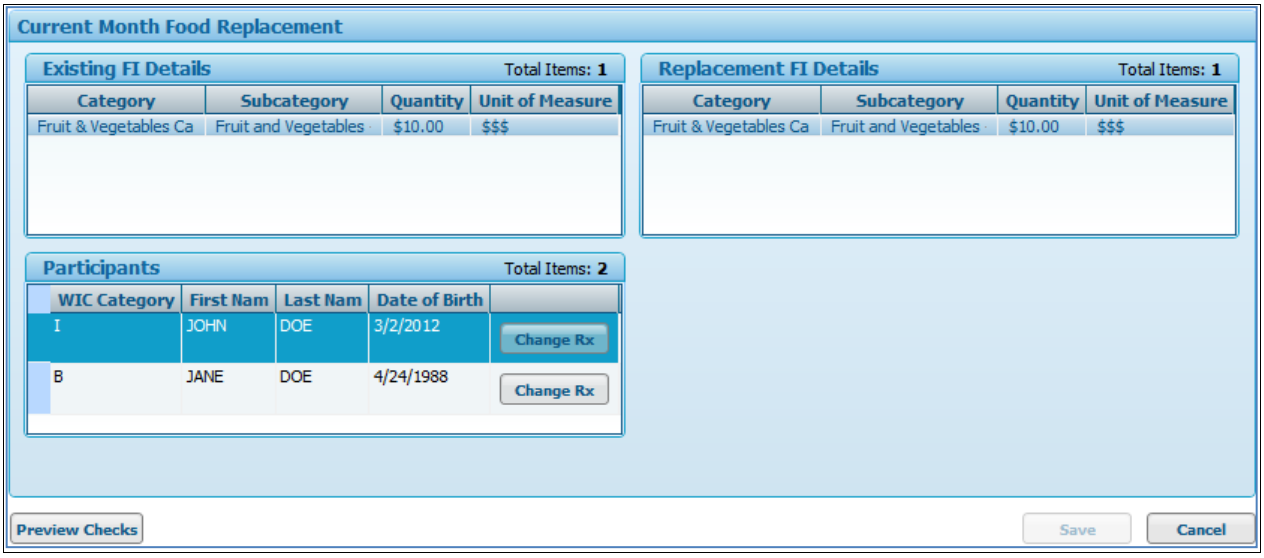
The Replace Current Benefits screen allows you to replace food instruments for the current month with different food items when some benefits have been redeemed.

7. Review the existing food instrument details, replacement food instrument details, and participant information on the screen.

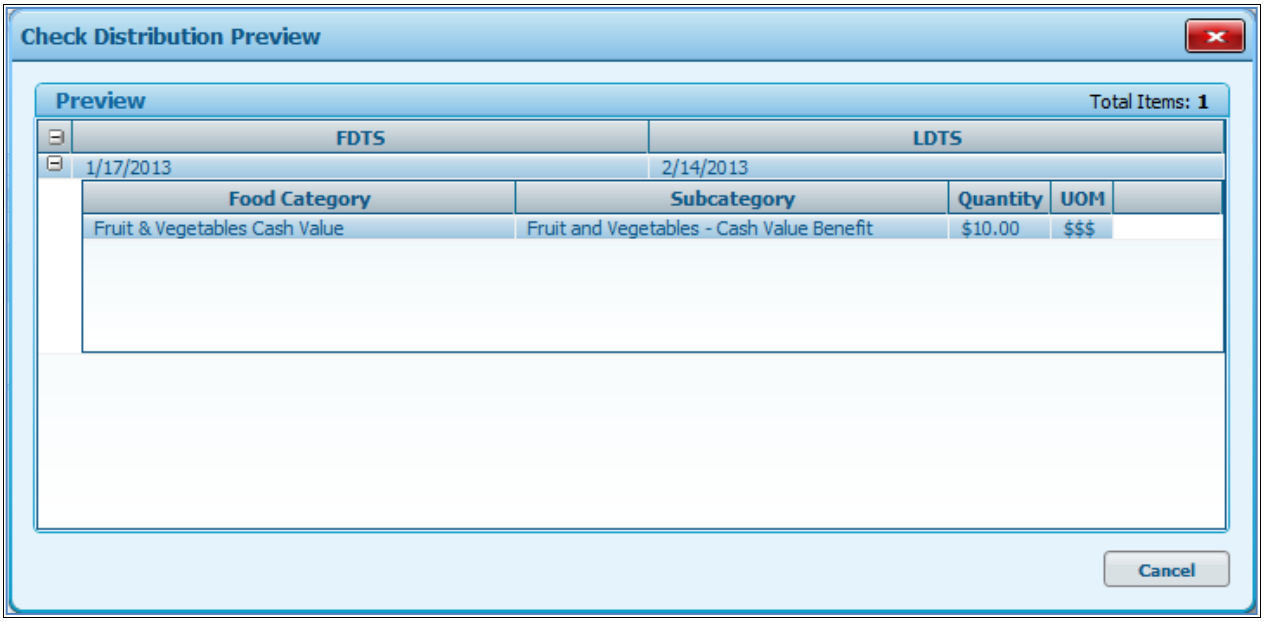
8. Click **Change Rx**. The **Prescribe Food** screen displays. Refer to other scenarios in this section for detailed information on adding or modifying food prescriptions.



9. Click **Save**. The **Replace Current Benefits** screen refreshes and displays the updated food instrument details.



10. Click **Preview Checks**. The **Check Distribution Preview** screen displays.



11. Review the food instrument details on the screen.
12. Click **Cancel**. The **Replace Current Benefits** screen displays.
13. Click **Save**. The new benefits will be issued. The **Food Instrument List** screen will be updated to display the previous food instrument in a void status as well as display the new food instrument issued to the family.

Congratulations!

You have successfully completed the Replace Selected **Food Instrument List** process.

Replace Current Benefits

The following scenario describes the process of replacing the current month's benefits. This functionality is available for states configured for EBT issuance only and it can be used for food items only (not formula items).

The system displays the benefits remaining on the Electronic Benefit Account (EBA) for the selected family and enables a user to make changes to the current month's benefits. For example, assume a participant was originally issued low-fat milk. A user could replace the remaining units of low-fat milk with another type of milk such as lactose reduced milk.

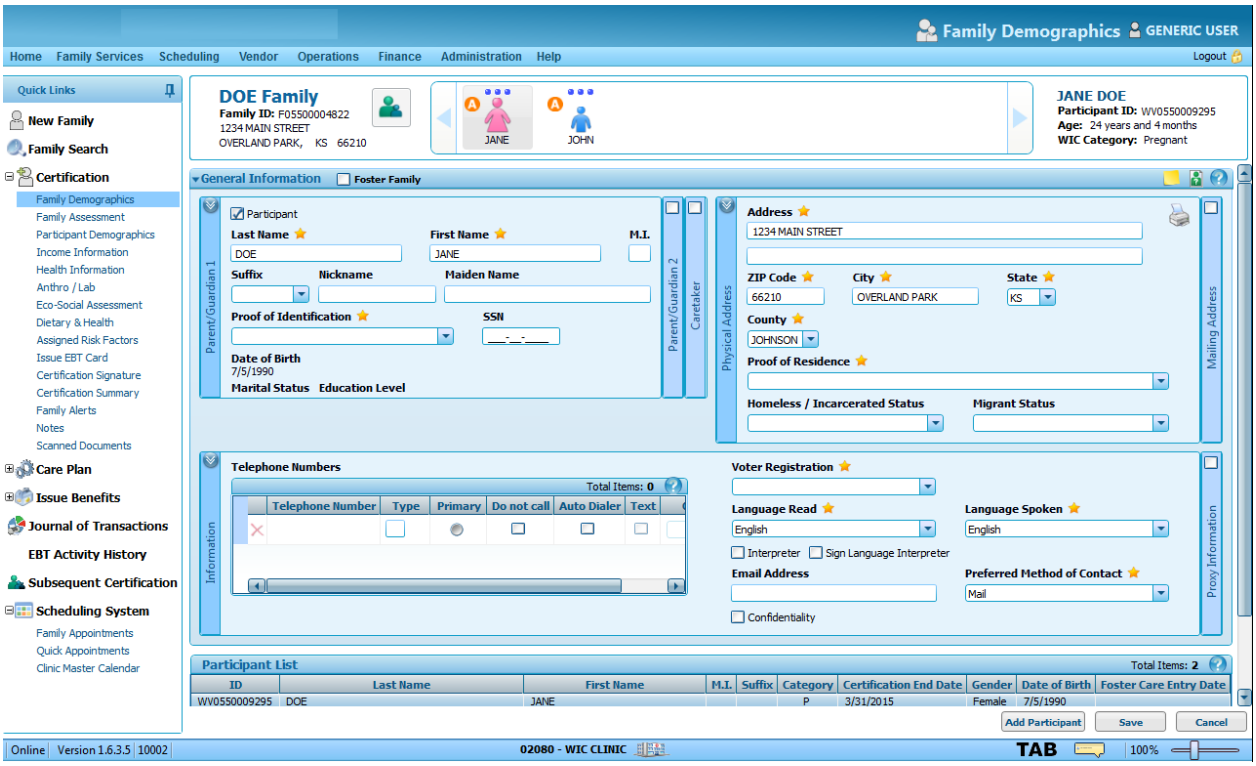
This process includes the following task(s):

Task A. Replacing Current Benefits (Food Items Only) 8-81

Task A. Replacing Current Benefits (Food Items Only)

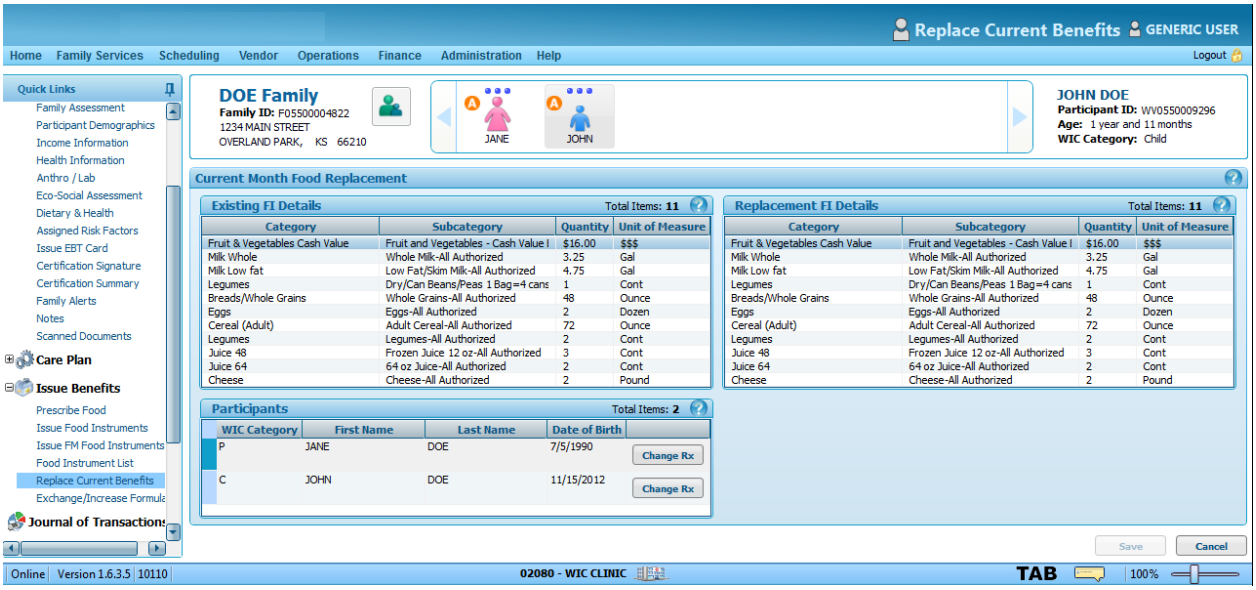
Complete the following steps to perform this task:

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



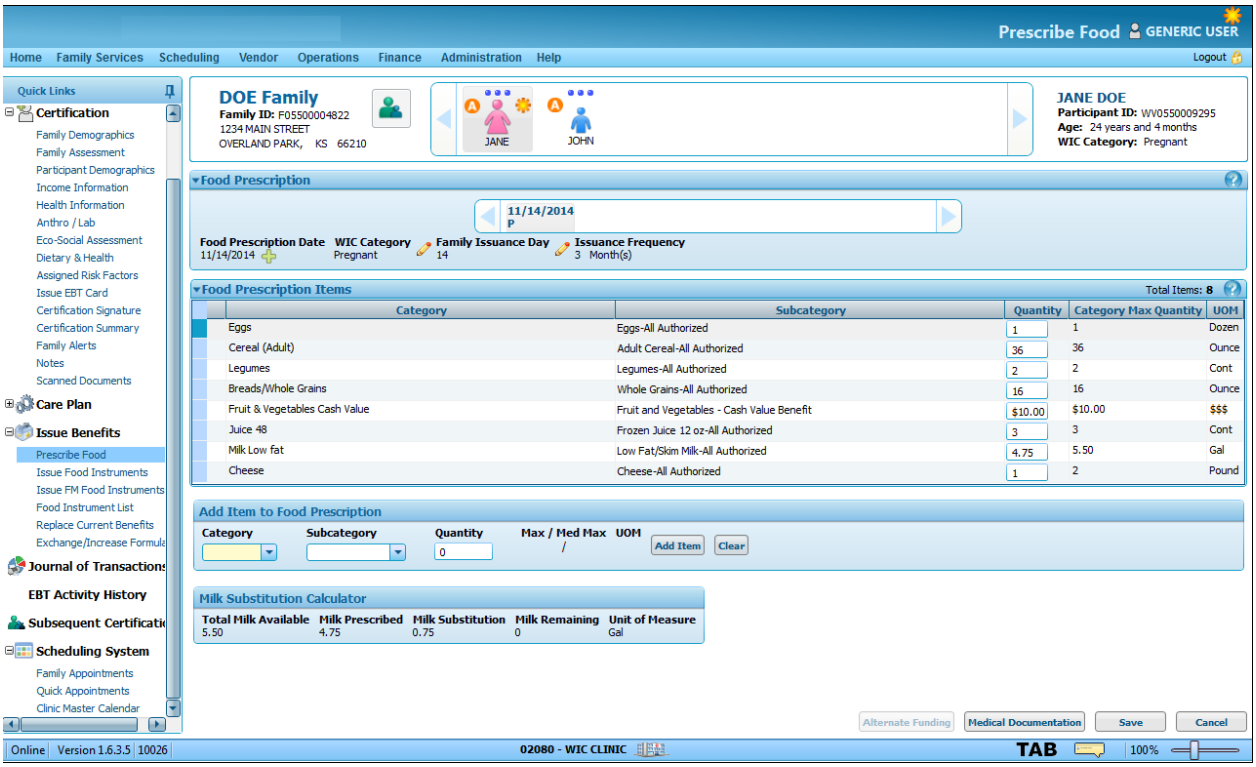
The Replace Current Benefits screen can be used to modify benefits only if a new prescription is added. If you are attempting to correct an issuance that utilized a prescription added today, you can void the benefits, correct the prescription (with today's date), and then reissue the benefits using the normal process. For example, assume you completed an Initial Certification on a participant and issued the wrong type of milk. Because the prescription would have been added today (for the Initial Certification), you can void the originally issued benefits, modify the prescription with today's date, and then reissue the benefits using the Issue Food Instruments screen.

2. Go to **Family Services → Quick Links → Issue Benefits → Replace Current Benefits**. The **Replace Current Benefits** screen displays.

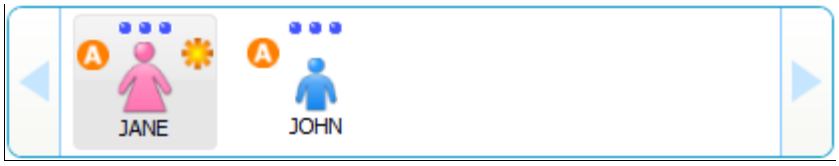


The system displays the remaining unredeemed benefits for the current month within the Existing FI Details grid. Prior to adding a new food prescription, the same unredeemed benefits are displayed within the Replacement FI Details grid as well.

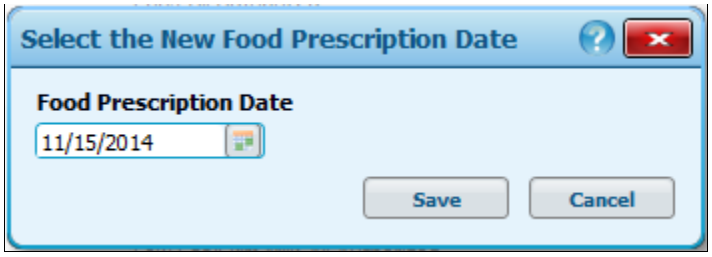
3. Click the **Change Rx** button in order to add a new prescription for the family member needing to have their benefits replaced. The **Prescribe Foods** screen displays.



4. Select the desired family member within the **Family Header**, if necessary.



5. Click **Create New Food Prescription** ( ). The **Select the New Food Prescription Date** screen displays.

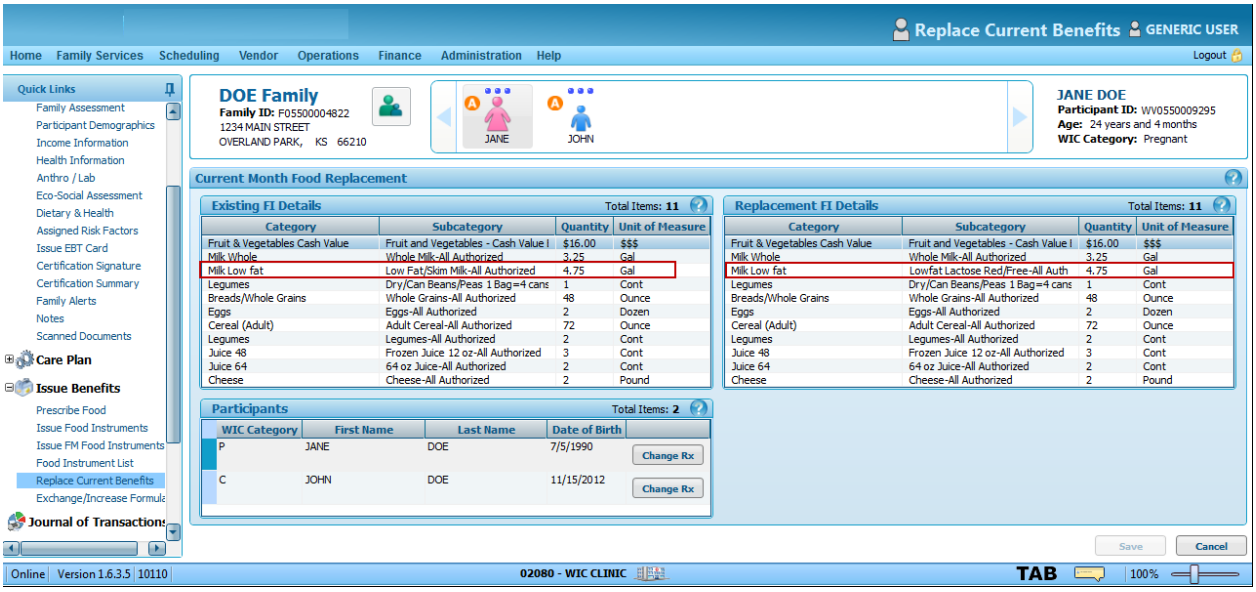


6. Ensure the **Food Prescription Date** displays the current system date (today's date) or select it if necessary.

7. Click **Save**. You are returned to the **Prescribe Food** screen and the newly added prescription displays.

8. Modify the food items as necessary for the newly added prescription.

9. Once the necessary changes have been made, click **Save**. You are returned to the **Replace Current Benefits** screen and the **Replacement FI Details** grid is updated to display the newly selected food items.



10. Click **Save** to replace the original food items with the newly selected food items. The original food items are removed from the family's Electronic Benefits Account (EBA) and the newly selected food items are loaded onto the account.

Congratulations!

You have successfully completed the **Replace Current Benefits** process.

Exchange and/or Increase Formula

The **Exchange/Increase Formula** screen enables a user to:

- Document the return of cans of formula redeemed with a food instrument and then re-issue a new formula.
- Issue formula to an infant whose breastfeeding status is Fully Breastfed during the same issuance month the dyad linked mother received and redeemed food instruments and her breastfeeding status is Fully Breastfed.
- Issue newly-prescribed additional formula to an infant in partially breastfeeding status.
- Issue newly-prescribed WIC-eligible medical food to a child who has already received and redeemed food instruments for the issuance month.

This functionality is for the current benefit month only. Future-dated benefits must be voided using the Food Instrument List screen and reissued using the Issue Food Instruments screen.

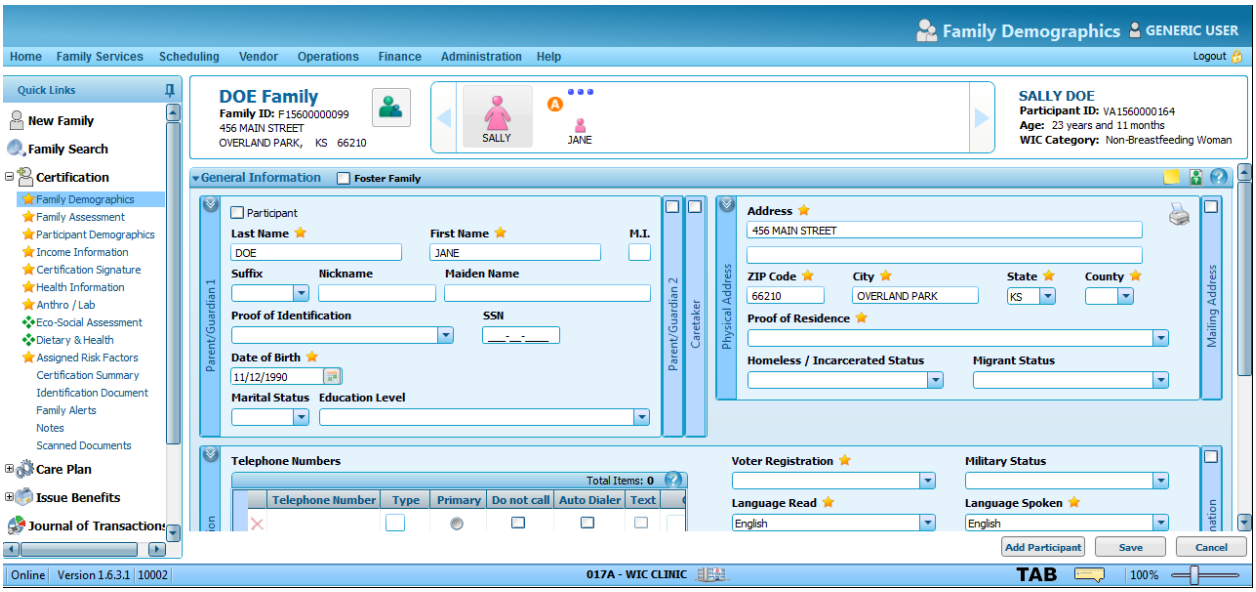
This process includes the following task(s):

Task A. Replacing Current Benefits (Food Items Only) 8-81
Task A. Exchanging Formula (No Increase to the Amount) 8-86
Task B. Exchanging Formula (and Increasing the Amount) 8-93

Task A. Exchanging Formula (No Increase to the Amount)

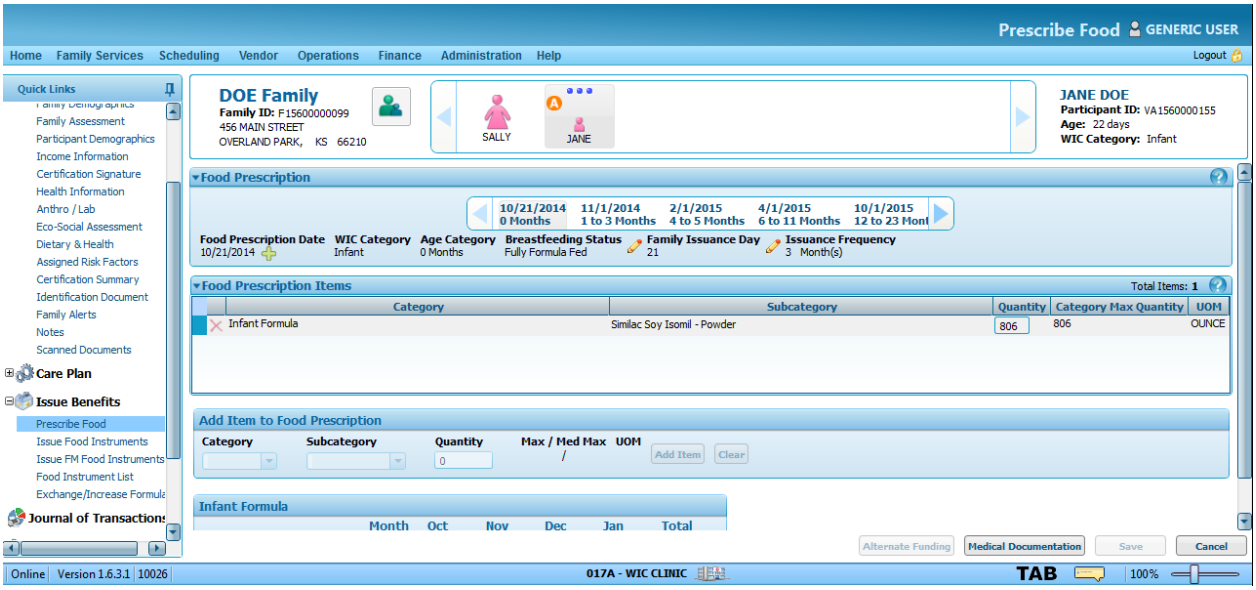
Complete the following steps to perform this task:

1. Access or open a family record.

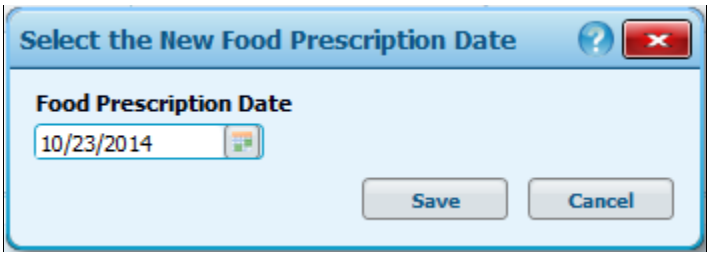


2. Select the infant icon within the Family Header.

3. Go to **Family Services → Issue Benefits → Prescribe Food**. The **Prescribe Food** screen displays.

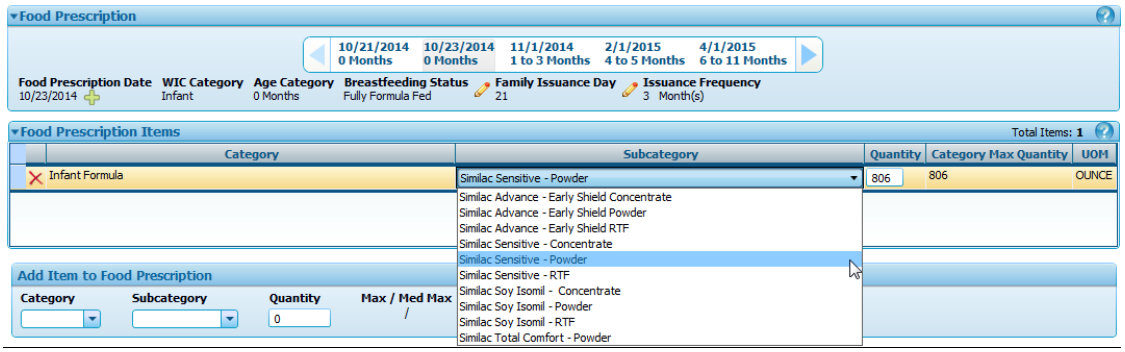


4. Click the **Create New Food Prescription (+)** button to add a new food prescription for the current system date. The **Select the New Food Prescription Date** screen displays.



5. Click **Save**. The new food prescription is added to the **Food Prescription** carousel.

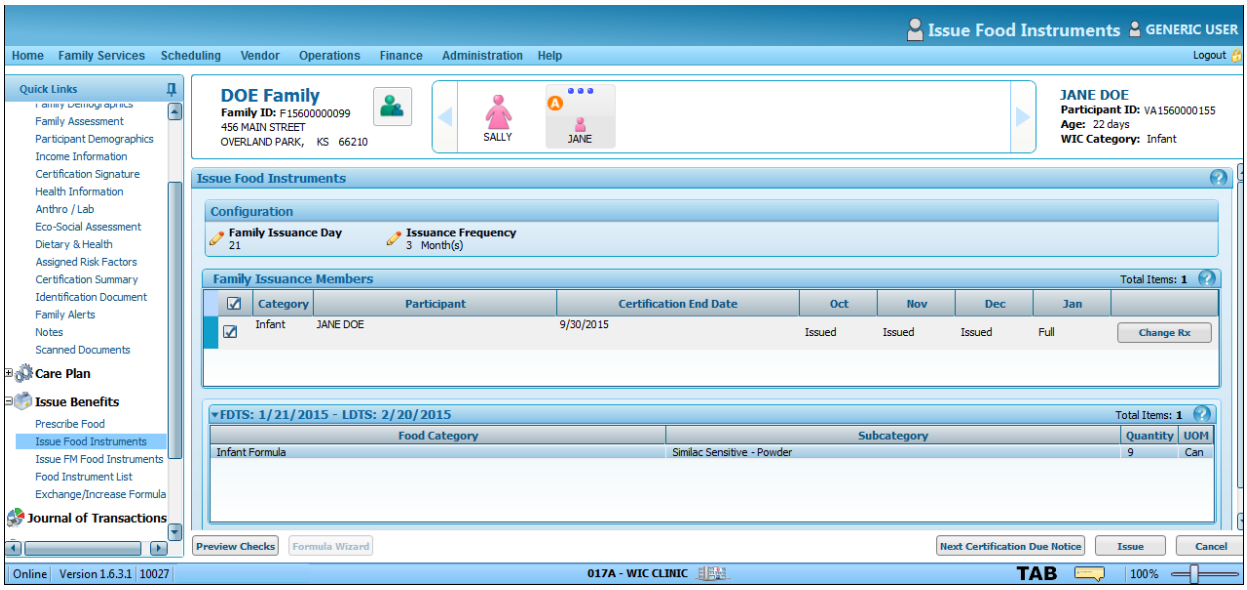
6. Select the newly prescribed (replacement) formula.



7. Once the new formula has been added to the infant's food prescription, click on the woman's icon in the Family Header to ensure the food prescriptions for both the woman and infant are in sync.

This step may not be necessary if the woman is no longer participating in the WIC program. If the woman is not participating, the Save button will be disabled. Select the infant icon and then click Save.

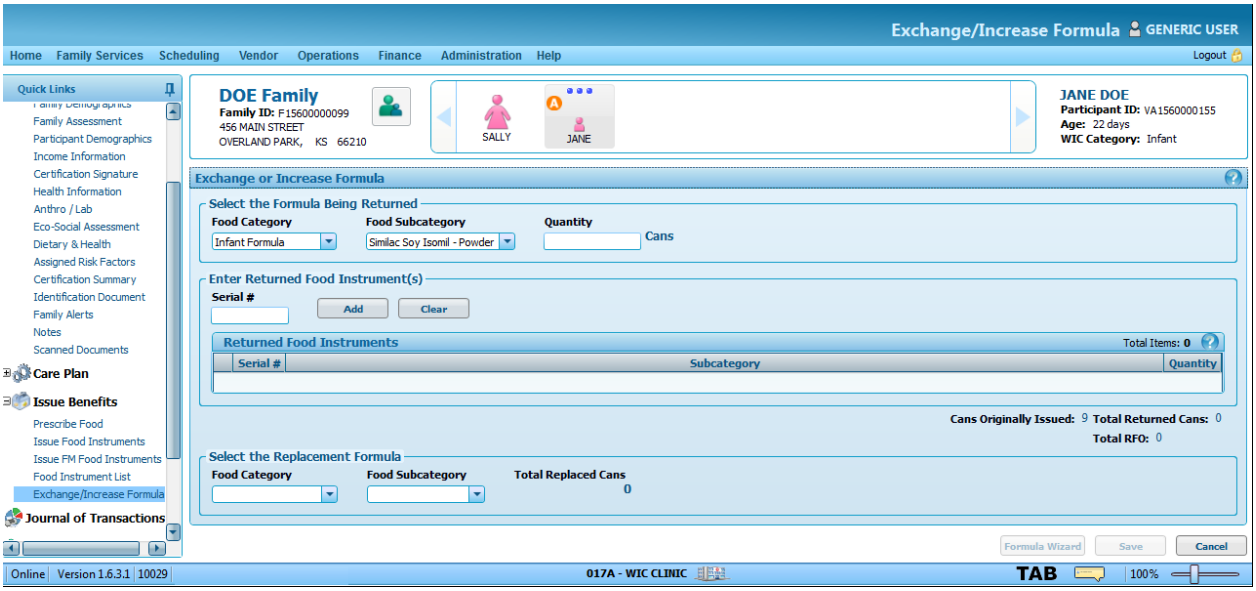
8. Click **Save**. The **Issue Food Instruments** screen displays.



Future-dated benefits can be issued from this screen assuming the future-dated benefits for the originally issued formula have been voided already. The benefits for the current month are issued

using the Exchange/Increase Formula screen which is explained below.

9. Go to **Family Services → Issue Benefits → Exchange/Increase Formula**. The **Exchange/Increase Formula** screen displays.



The Exchange/Increase Formula screen is used to exchange/increase formula benefits for the current month only.

10. View the information displayed on the right-hand portion of the screen which lists details about the original issuance and how many cans are returned which affects the amount that can be replaced.

This information is updated as information is entered into the following groups boxes:

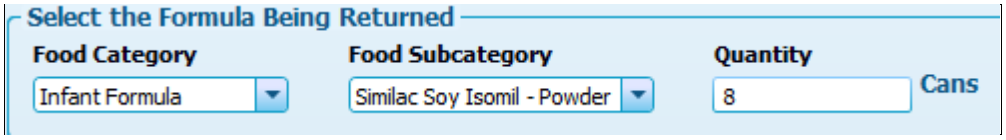
Select the Formula Being Returned

Enter Returned Food Instrument(s) group boxes

Select the Replacement Formula

It is recommended that users pay close attention to this information as it will help them understand how the system calculates the number of cans to be replaced.

11. Under **Select the Formula Being Returned**, select the **Food Category**, **Food Subcategory**, and then enter the **Quantity**.



The formula issued originally is displayed by default unless formula had not been issued previously (such as in the case of a fully breastfed infant).

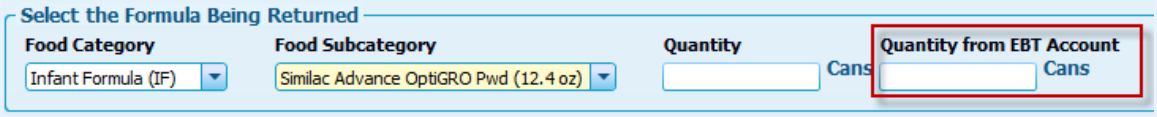
The quantity of formula cans being returned cannot exceed the quantity issued.

12. Under **Enter Returned Food Instrument(s)**, enter the **Serial #** of the food instrument to be returned then click **Add**. The screen refreshes and displays the food instrument in the **Returned Food Instruments** grid.

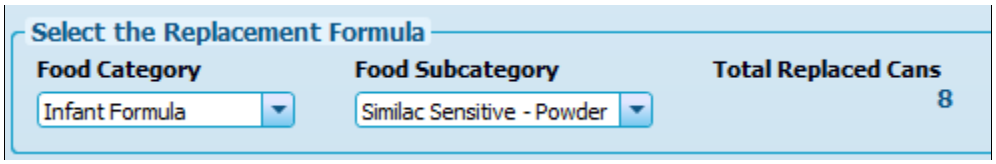
Food instruments to be returned must be in the current month of issuance; future issuance months cannot be returned.

For states using EBT, the name of the grid displays Current Month EBT Benefit Balance and the system displays the number of unredeemed cans available in the family's Electronic Benefit Account (EBA) automatically for the user.

The user can also indicate how many cans should be removed from the EBT account by placing a quantity in the Quantity from EBT Account text box shown below.



13. Under **Select the Replacement Formula**, select the **Food Category** and **Food Subcategory**.



Only items prescribed to the infant on the Prescribe Foods screen are available for selection. This is why it was necessary to add a new prescription and prescribe a new formula prior to this step.

14. View the information displayed on the right-hand portion of the screen which lists details about the original issuance and how many cans are returned which affects the amount that can be replaced.

Cans Originally Issued: 9 **Total Returned Cans:** 8
Total RFO: 720

The Total Returned Cans value determines the Total RFO value. The RFO of one (1) can of the replacement formula is divided into the Total RFO value to determine the Total Replaced Cans value. For example, assume the Total RFO value of eight (8) cans of formula returned is 720. If the RFO value of one (1) can of the replacement formula equals 90 ounces, then 720 is divided by 90 to equal eight (8) cans of replacement formula (Total RFO / the RFO of one can of replacement formula = the Total Replaced Cans).

15. Read the Note below.

Prior to clicking the Save button, a user can click the Formula Wizard button to launch the Formula Wizard even if cans are not available in the local inventory (in such cases where the replacement formula is to be ordered from a warehouse).

After the Save button is clicked, 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 (and/or order it from a warehouse). Use the Formula Wizard to complete the replacement process or dismiss the Formula Wizard screen to issue the replacement formula on a food instrument.

For more detail on how to complete the Formula Wizard, consult the Issue Food Instruments: Formula Wizard scenario in this manual.

16. Do one of the following:

- Click the **Formula Wizard** button to launch the Formula Wizard. The Formula Wizard screen displays. Complete the Formula Wizard to complete the replacement process.

Launching the Formula Wizard from the Exchange/Increase Formula screen limits the issuance of formula (from the local inventory or from the CAP warehouse) to the current month only.

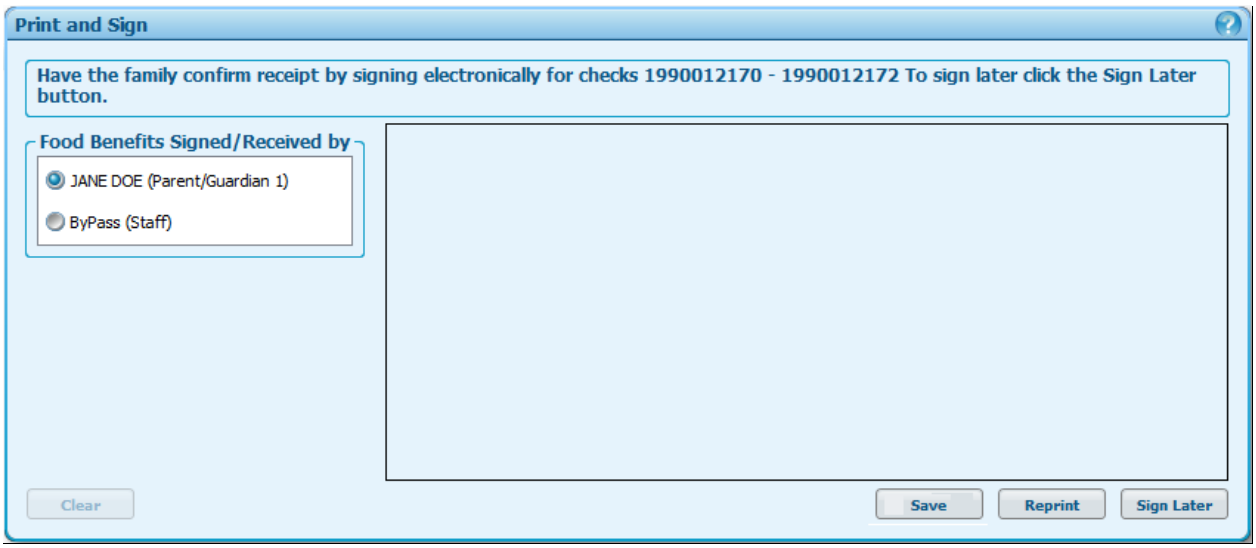
Replacement benefits are logged on the Food Instrument List screen like any other benefit that is issued. However, since Food Instrument(s) in a redeemed status from the original issuance cannot be voided, this may result in the appearance of over-issuance (even though that is not the case). To view details of a returned formula transaction, review the Journal of Transactions.

- Click **Save**. If the replacement formula is available in the local inventory, the **Formula Wizard** screen displays. Either complete the Formula Wizard to issue from the local inventory (and/or to order it from a warehouse) or dismiss the Formula Wizard to issue the replacement formula on food instrument(s).

Launching the Formula Wizard from the Exchange/Increase Formula screen limits the issuance of formula (from the local inventory or from the CAP warehouse) to the current month only.

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.

- Click **Save**. If the replacement formula in not available in the local inventory, the **Print and Sign** screen displays. 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.

Task B. Exchanging Formula (and Increasing the Amount)

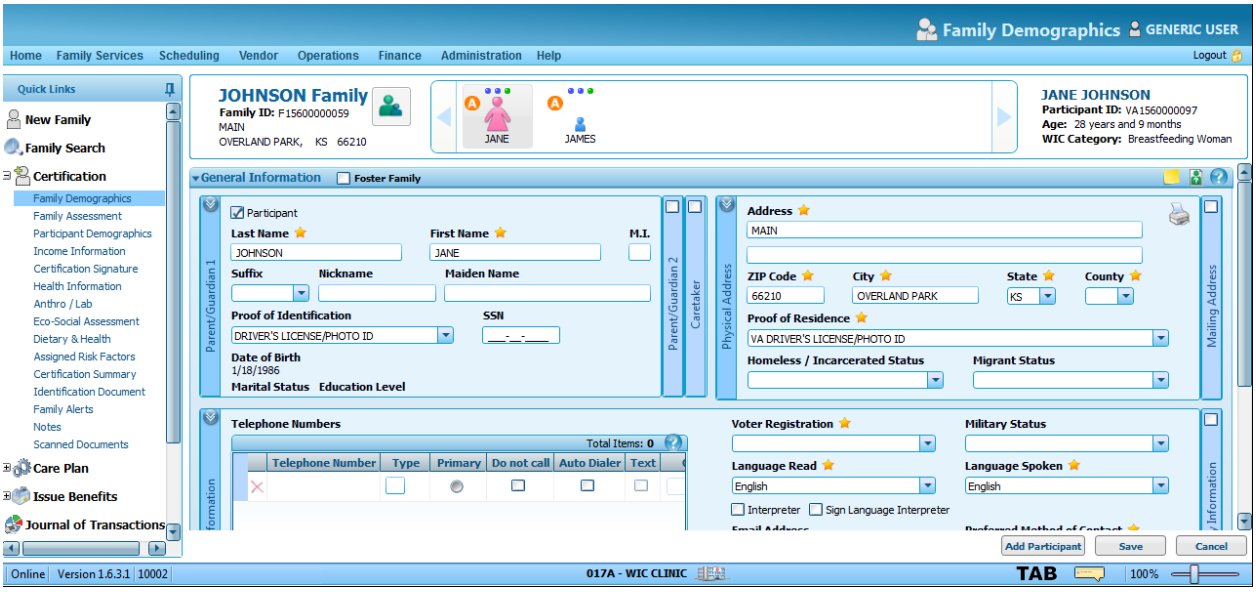
Complete the following steps to perform this task:

This task explains the process of replacing the formula originally issued to an infant with a different formula including increasing the amount beyond what was originally issued to the infant. For example, the infant was issued 5 cans of formula (A) and now the user intends to replace the original issuance with a different formula (B) and increase the amount to 7 cans.

The ability to increase formula is a configurable system setting and must be enabled for the Exchange/Increase Formula screen to function as described below (Administration → Configuration → Manage System Settings → Operations container → Allow additional issuance of formula check box).

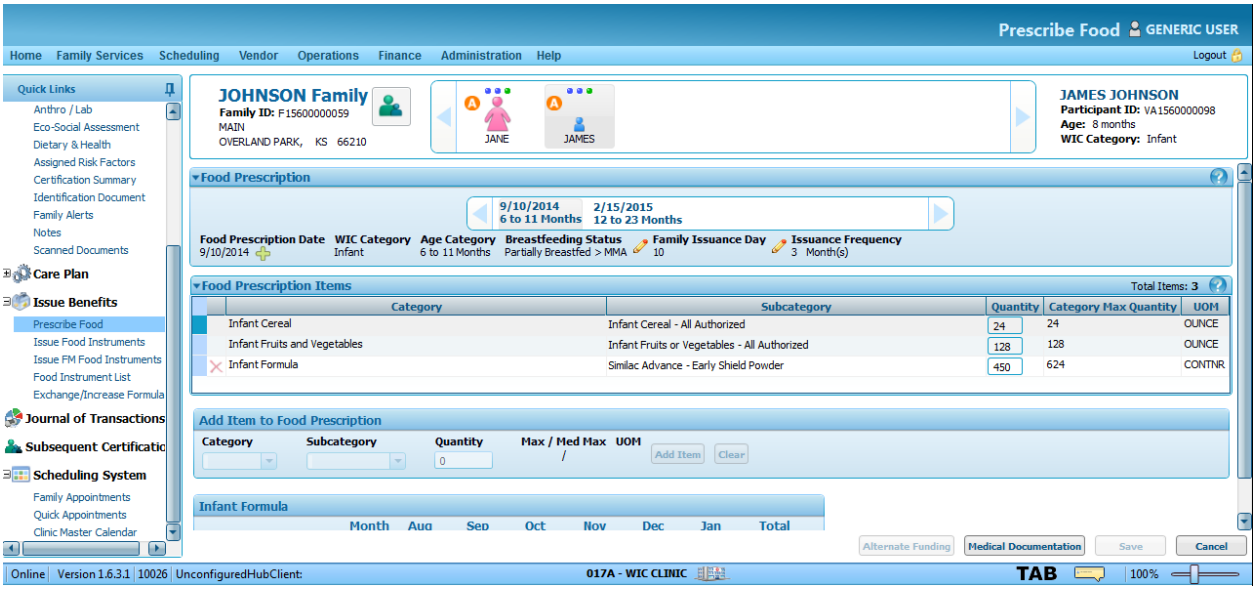
The Exchange/Increase Formula screen is used to exchange/increase formula benefits for the current month only.

1. Search for and access a family record.

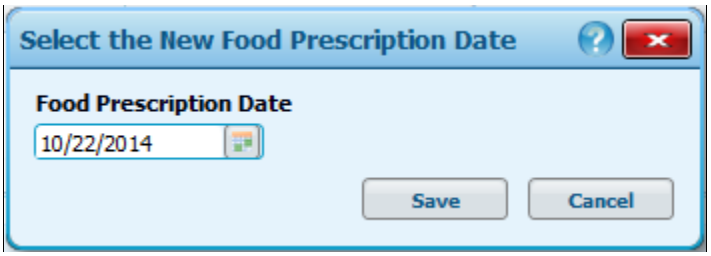


2. Select the infant icon within the Family Header.

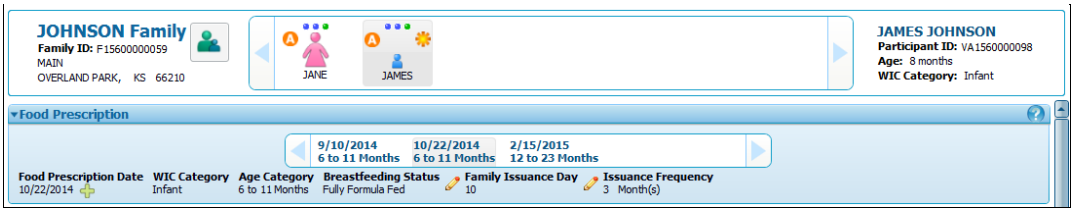
3. Go to **Family Services → Issue Benefits → Prescribe Food**. The **Prescribe Food** screen displays.



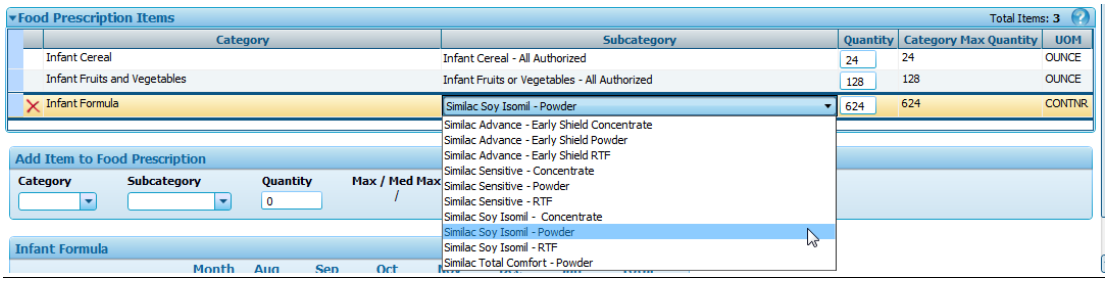
4. Click the **Create New Food Prescription (+)** button to add a new food prescription for the current system date. The **Select the New Food Prescription Date** screen displays.



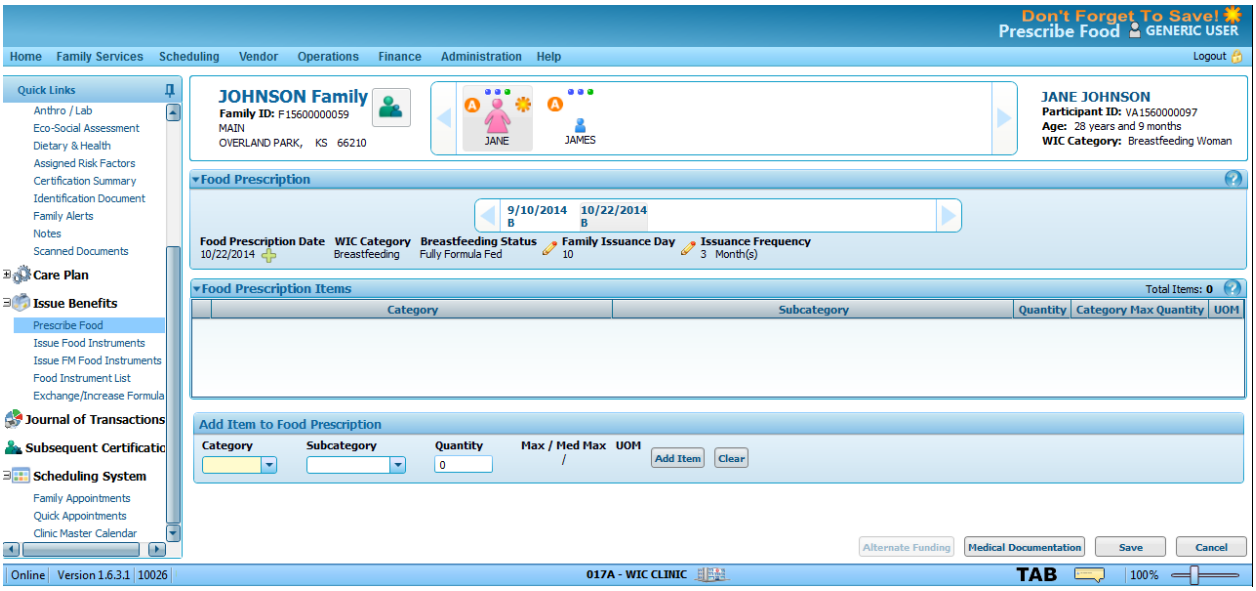
5. Click **Save**. The new food prescription is added to the **Food Prescription** carousel.



6. Select the newly prescribed (replacement) formula.

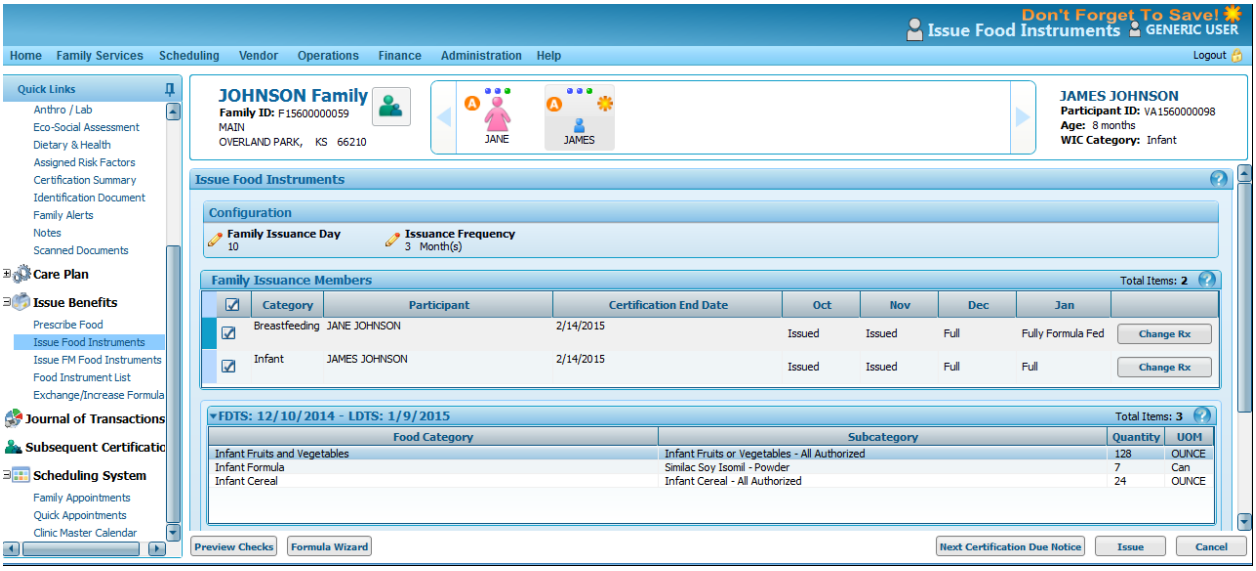


7. Once the new formula has been added to the infant's food prescription, click on the woman's icon in the Family Header to ensure the food prescriptions for both the woman and infant are in sync.



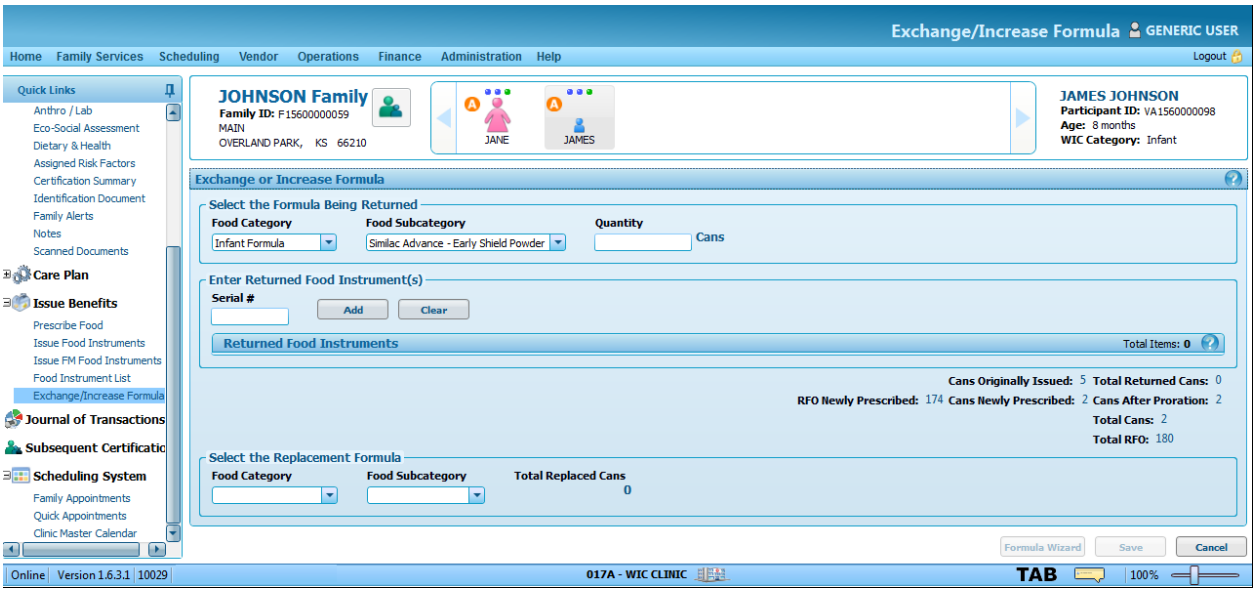
This step may not be necessary if the woman is no longer participating in the WIC program. If the woman is not participating, the Save button will be disabled. Select the infant icon and then click Save.

8. Click **Save**. The **Issue Food Instruments** screen displays.

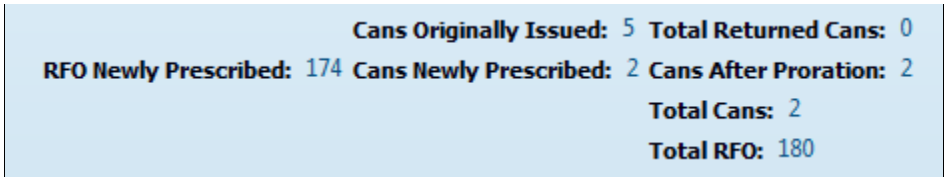


Future-dated benefits can be issued from this screen assuming the future-dated benefits for the originally issued formula have been voided already. The benefits for the current month are issued using the Exchange/Increase Formula screen which is explained below.

9. Go to **Family Services → Issue Benefits → Exchange/Increase Formula**. The **Exchange/Increase Formula** screen displays.



10. View the information displayed on the right-hand portion of the screen which lists details about the original issuance and what will be the replacement issuance.



This information is updated as information is entered into the following groups boxes:

Select the Formula Being Returned

Enter Returned Food Instrument(s) group boxes

Select the Replacement Formula

It is recommended that users pay close attention to this information as it will help them understand how the system calculates the number of cans to be replaced.

11. Under **Select the Formula Being Returned**, select the **Food Category**, **Food Subcategory**, and then enter the **Quantity**.

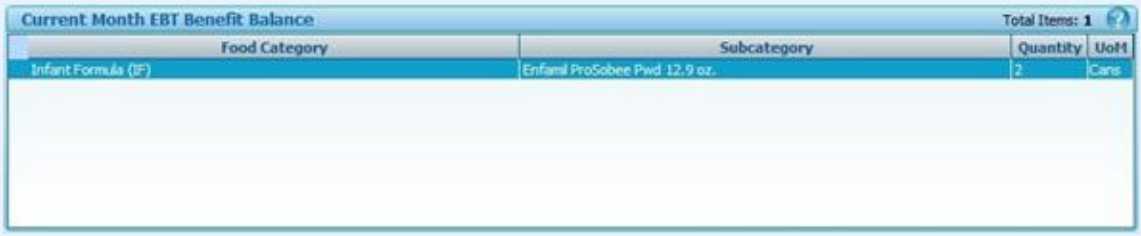
The formula issued originally is displayed by default unless formula had not been issued previously (such as in the case of a fully breastfed infant).

The quantity of formula cans being returned cannot exceed the quantity issued.

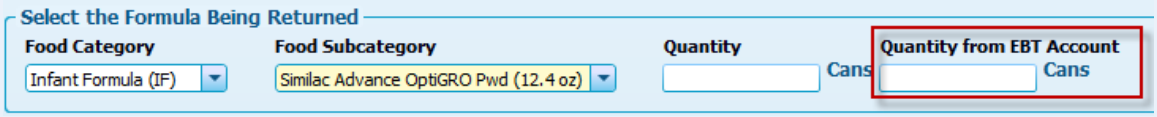
12. Under **Enter Returned Food Instrument(s)**, enter the **Serial #** of the food instrument to be returned the n click **Add**. The screen refreshes and displays the food instrument in the **Returned Food Instruments** grid.

Food instruments to be returned must be in the current month of issuance; future issuance months cannot be returned.

For states using EBT, the name of the grid displays Current Month EBT Benefit Balance and the system displays the number of unredeemed cans available in the family's Electronic Benefit Account (EBA) automatically for the user.



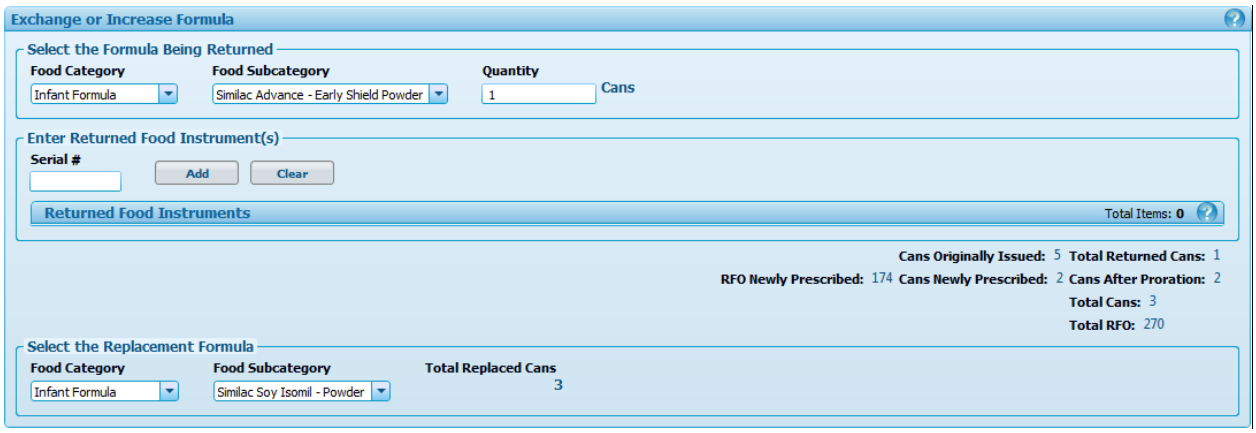
The user can also indicate how many cans should be removed from the EBT account by placing a quantity in the Quantity from EBT Account text box shown below.



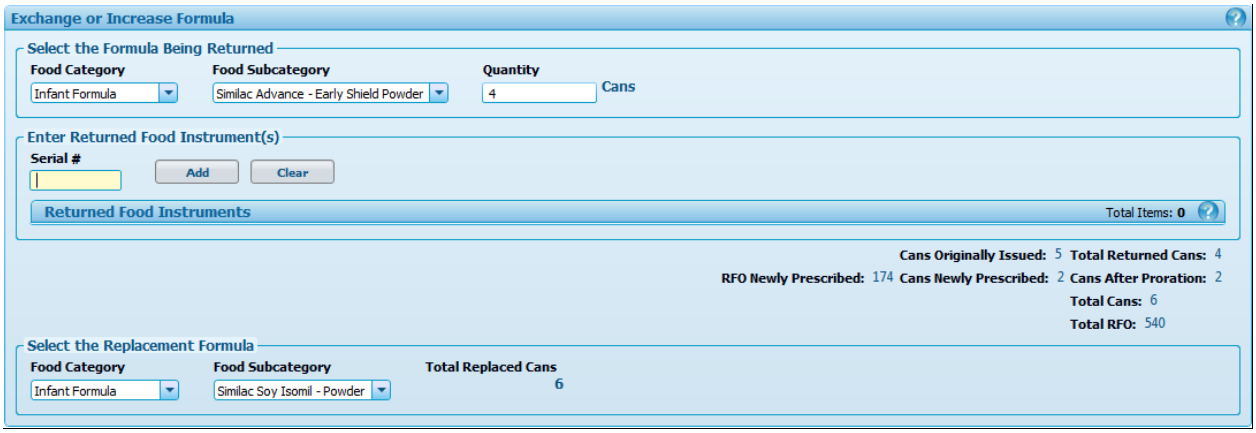
13. Under **Select the Replacement Formula**, select the **Food Category** and **Food Subcategory**.

14. View the examples below. Three unique examples have been provided. Each example illustrates a different amount of formula being returned.

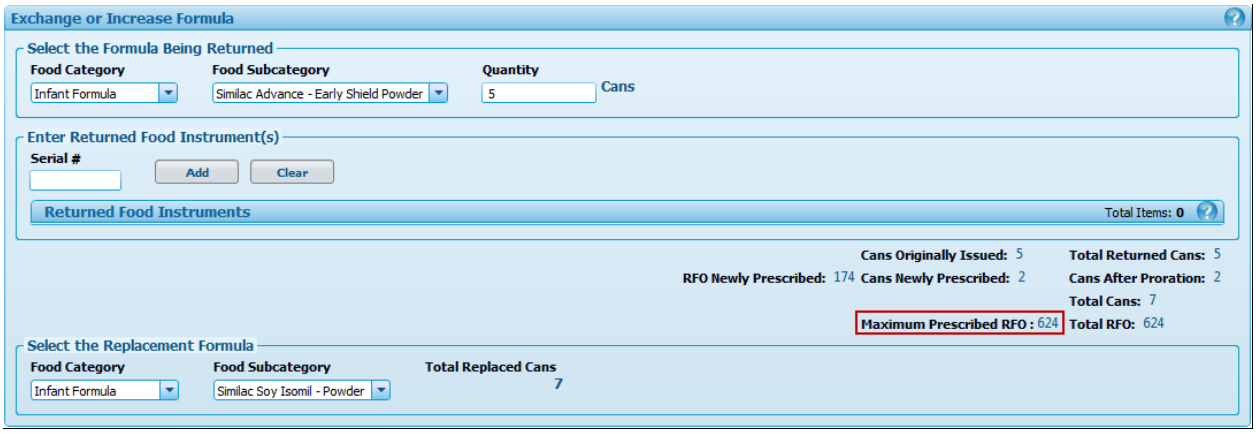
- One (1) can of formula being returned



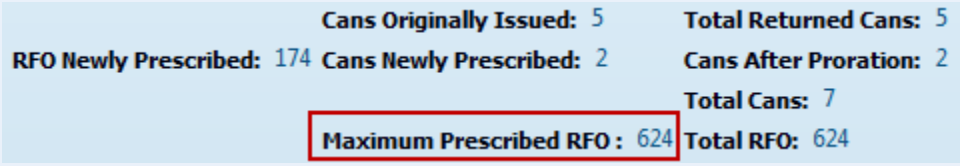
- Four (4) cans of formula being returned



- Five (5) cans of formula being returned



A new piece of information will be added on the screen called Maximum Prescribed RFO which is populated with the value from the Food Maximum Quantity. This field is displayed when the quantity of formula exceeds the maximum quantity due to rounding. For example, if 624 RFO was prescribed, but the Total RFO equals 630 (7 cans x 90 RFO = 630) due to rounding then the Maximum Prescribed RFO value displays and all the calculations will be based on the maximum amount (624).



15. Read the Note below.

Prior to clicking the Save button, a user can click the Formula Wizard button to launch the Formula Wizard even if cans are not available in the local inventory (in such cases where the replacement formula is to be ordered from a warehouse).

After the Save button is clicked, 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 (and/or order it from a warehouse). Use the Formula Wizard to complete the replacement process or dismiss the Formula Wizard screen to issue the replacement formula on a food instrument.

For more detail on how to complete the Formula Wizard, consult the Issue Food Instruments: Formula Wizard scenario in this manual.

16. Do one of the following:

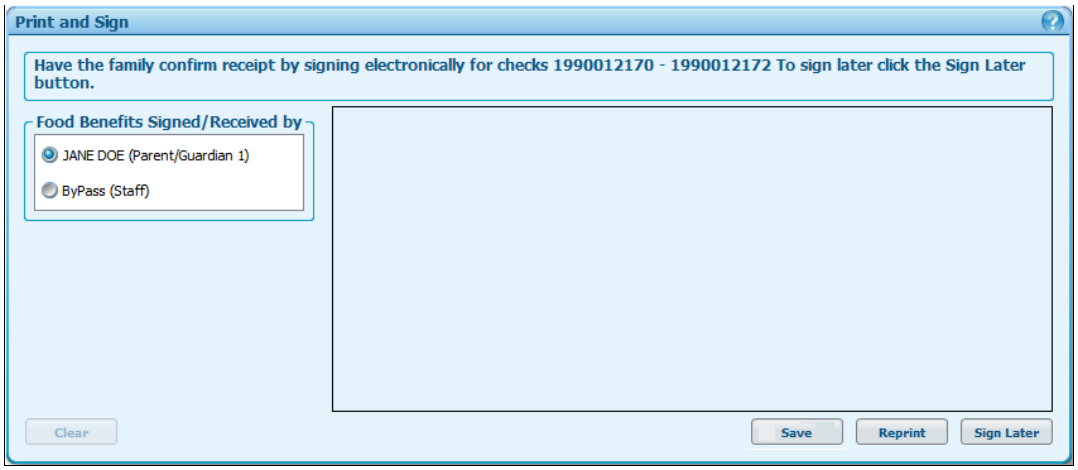
- Click the **Formula Wizard** button to launch the Formula Wizard. The **Formula Wizard** screen displays. Complete the Formula Wizard to complete the replacement process.

> Launching the Formula Wizard from the Exchange/Increase Formula screen limits the issuance of formula (from the local inventory or from the CAP warehouse) to the current month only.
>
> 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.

- Click **Save**. If the replacement formula is available in the local inventory, the **Formula Wizard** screen displays. Either complete the Formula Wizard to issue from the local inventory (and/or to order it from a warehouse) or dismiss the Formula Wizard to issue the replacement formula on food instrument(s).

> Launching the Formula Wizard from the Exchange/Increase Formula screen limits the issuance of formula (from the local inventory or from the CAP warehouse) to the current month only.
>
> 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.

- Click **Save**. If the replacement formula is not available in the local inventory, the **Print and Sign** screen displays. 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 **Exchange and/or Increase Formula** process.

Void Farmers Market Food Instruments

This scenario describes the process of searching for and voiding farmers' market food instruments that have been issued.

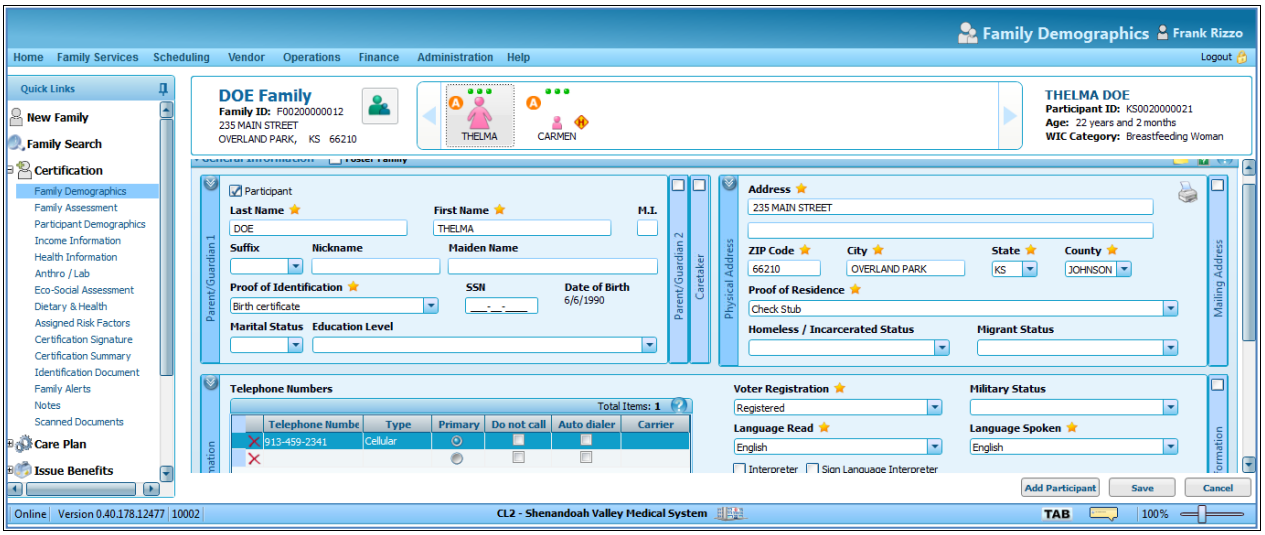
This process includes the following task(s):

Task A. Voiding Farmers Market Food Instruments 8-103

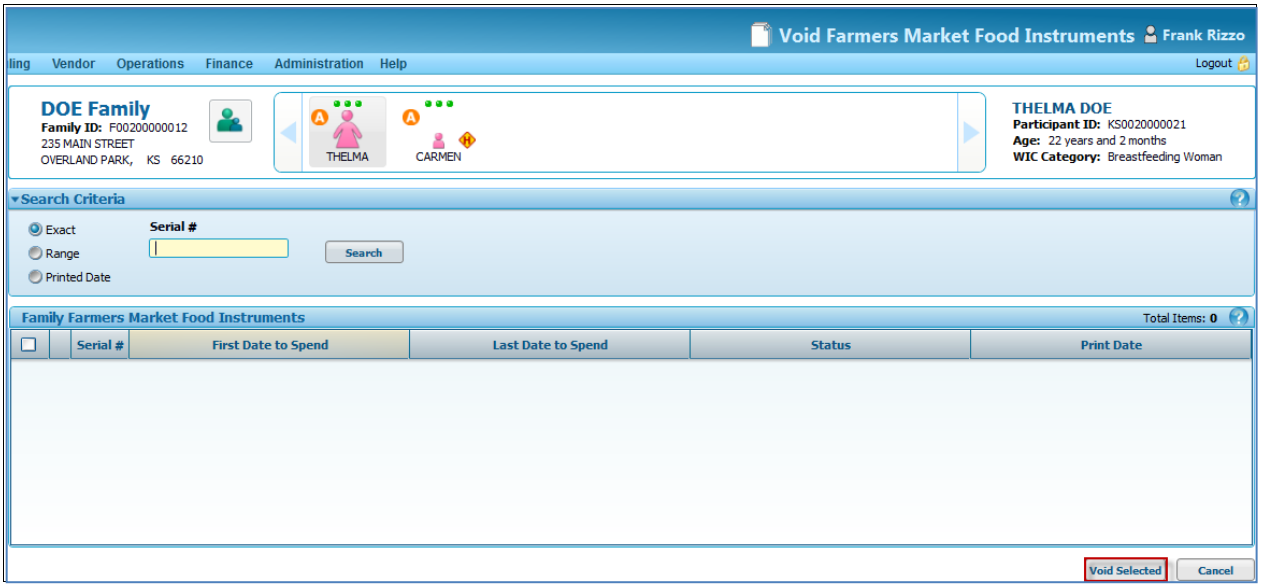
Task A. Voiding Farmers Market Food Instruments

Complete the following steps to perform this task:

1. Search for and access a family record.



2. Go to **Family Services → Issue Benefits → Void Farmers Market Food Instruments**. The **Void Farmers Market Food Instruments** screen displays.

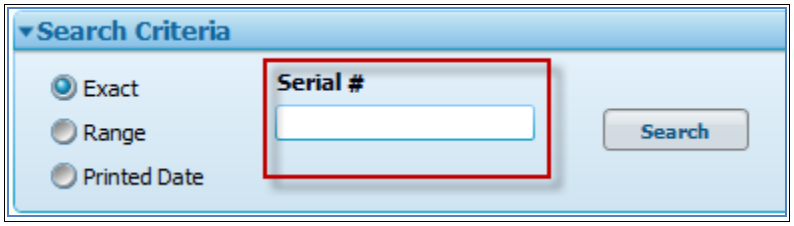


3. Under **Search Criteria**, select **Exact**, **Range**, **or Printed Date**.

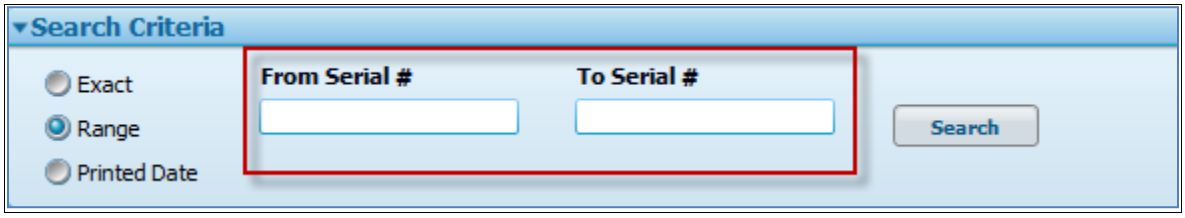
The additional search Criteria to be entered depends on your selection.

4. Enter additional search criteria as follows:

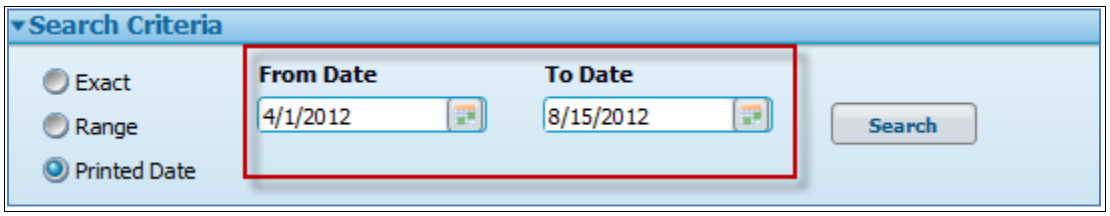
- If you selected **Exact**, enter the exact **Serial #** from a single food instrument.



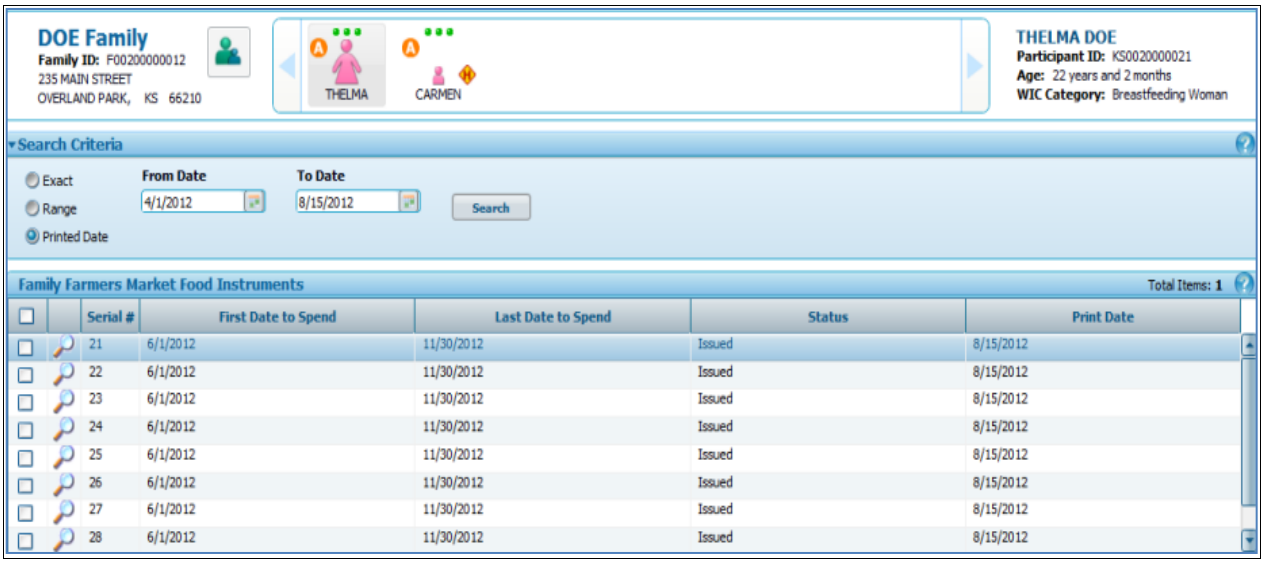
- If you selected **Range**, enter the **From Serial #** and **To Serial #** from a range of food instruments.



- If you selected **Printed Date**, enter or select the **From date** and **To Date** for one or more food instruments.



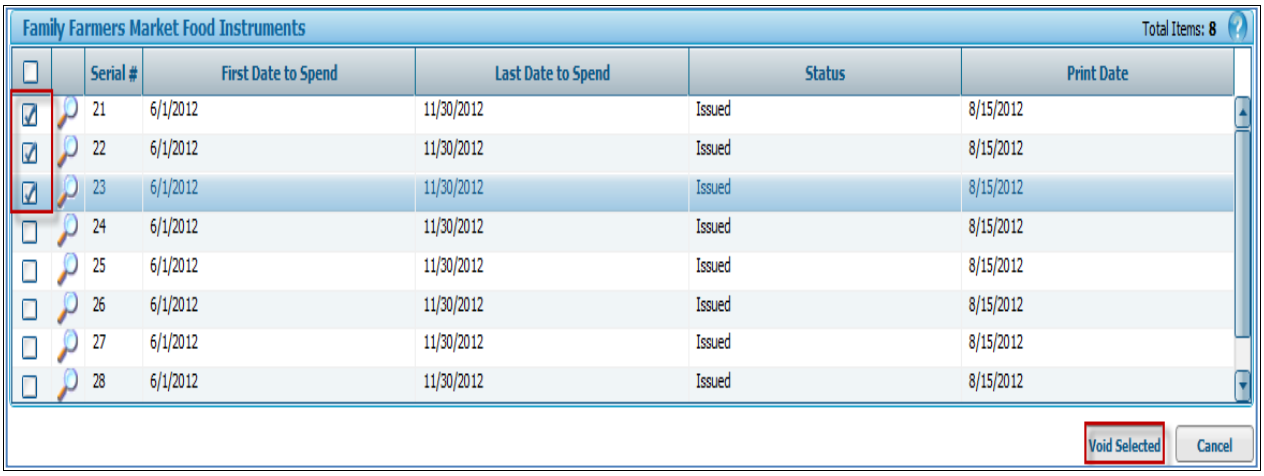
5. Click **Search**. The screen refreshes and displays the results of the search in the **Family Farmers Market Food Instruments** grid.



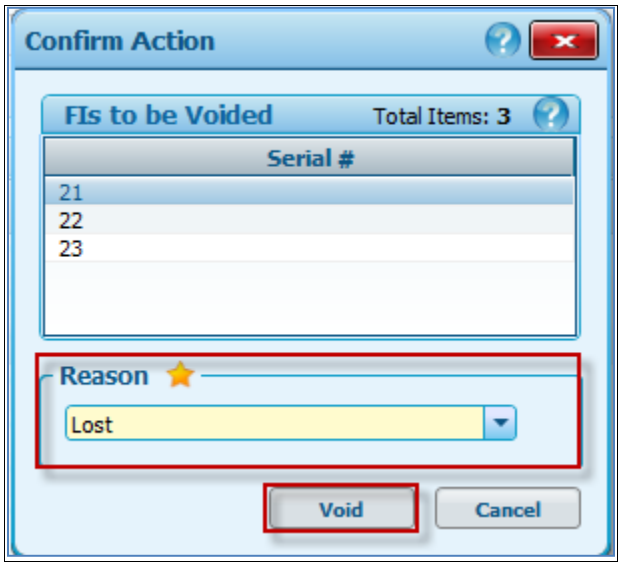
The Family Farmers Market Food Instruments grid includes the Serial #, First Date to Spend, Last Date to Spend, Status and Print Date for all Farmers Market Food Instruments matching the search criteria.

Click and hold a column header to sort the results of the search. Drag and drop columns of information to reorganize the order of the columns on the grid.

6. Select the check box for each food instruments to void.

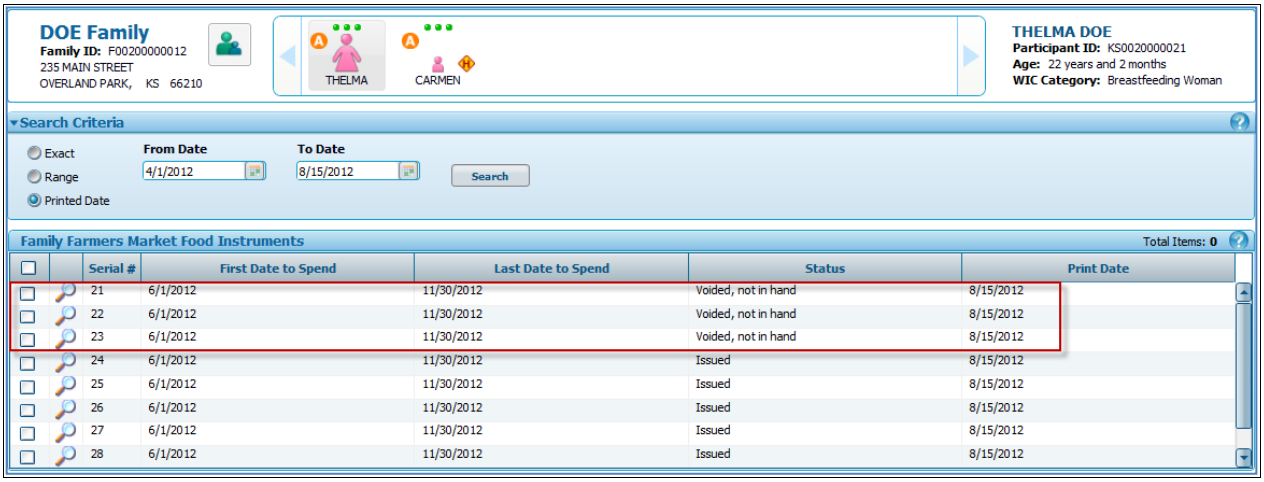


7. Click **Void Selected**. The **Confirm Action** screen displays.



8. Select the **Void Reason**.

9. Click **Void**. The screen refreshes and the **Family Farmers Market Food Instruments** grid displays the voided, not in-hand food instruments.



Congratulations!

You have successfully completed the **Void Farmers Market Food Instruments** process.

9- BREASTFEEDING SUPPORT

Issuing, Reserving, Monitoring, and Returning Breast Pumps

The **Breastfeeding Support** menu allows you to issue breast pumps and breastfeeding supplies to a participant, follow-up on breast pump issuances and return breast pumps back into inventory.

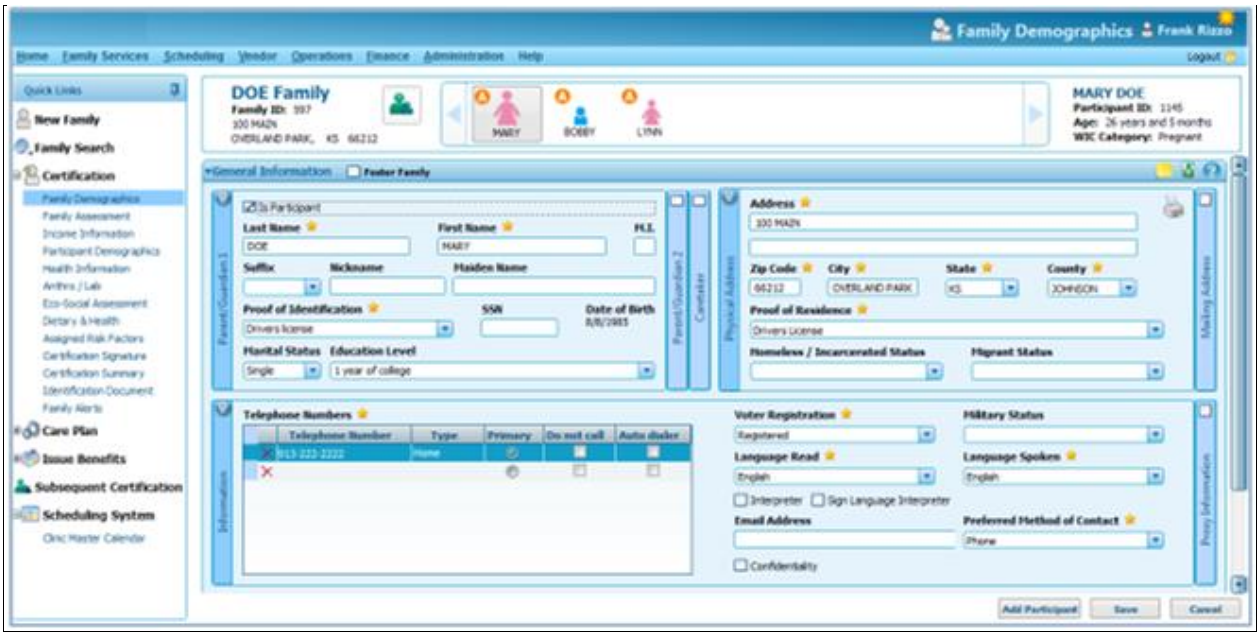
This process includes the following task(s):

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

Task A. Issuing or Reserving a Breast Pump

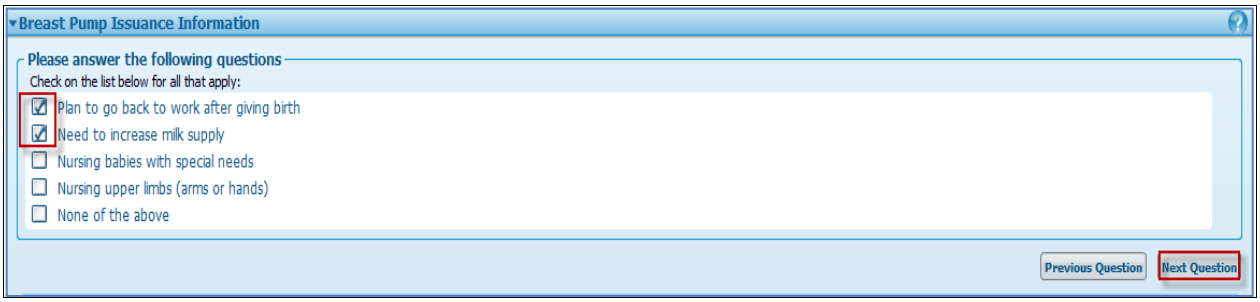
Complete the following steps to perform this task:

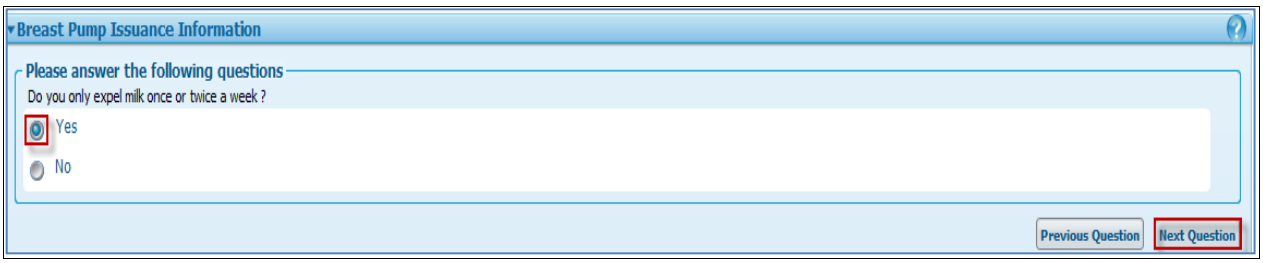
1. Search for and access a family record.



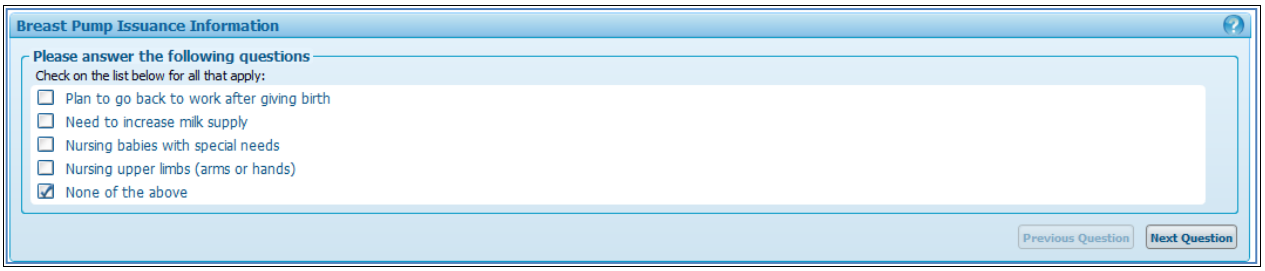
2. Go to **Family Services → Breastfeeding Support (from the Menu Bar) → Breast Pump Issuance**. The **Breast Pump Issuance** screen displays.

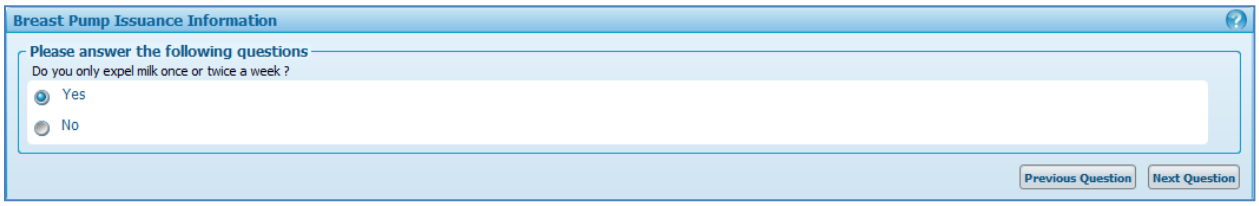
3. Under **Breast Pump Issuance Information**, complete the **Please answer the following questions** section by checking one or more of the available boxes. (These questions are configurable.)



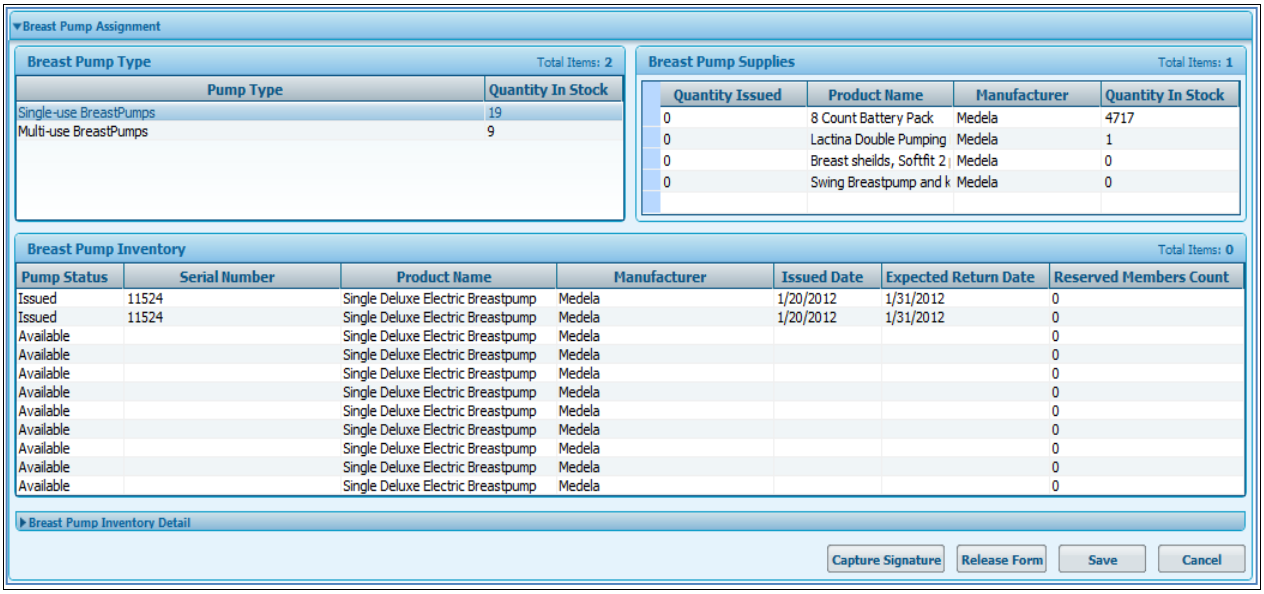


If you select None of the above, an additional question displays. Select an answer to the additional question.





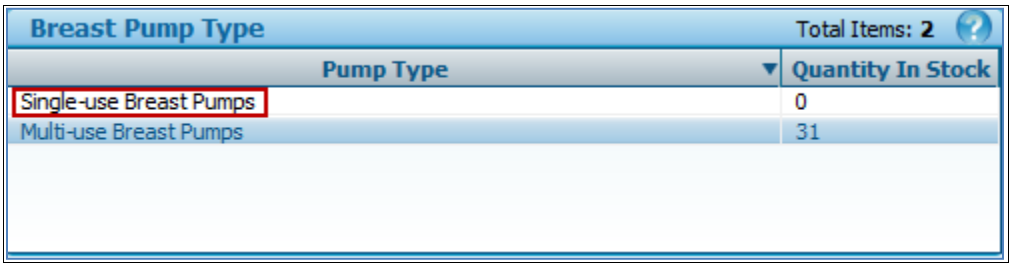
4. Click **Next Question**. The screen refreshes and displays the **Breast Pump Assignment** section.

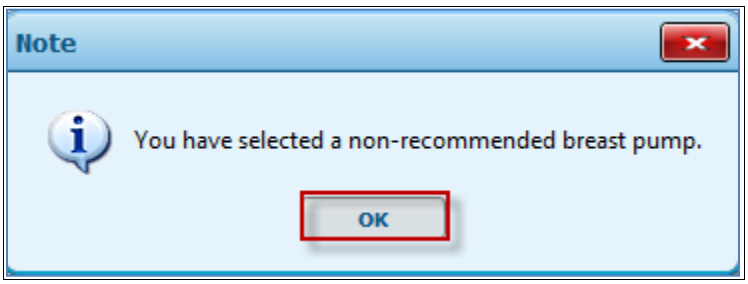


Under Breast Pump Type, a list of breast pumps displays with the recommended pump initially selected. The quantity in stock is also indicated.

Click a column header to sort the items in the grid. Click and hold, then drag and drop columns of information to reorganize the order of the columns in the grid.

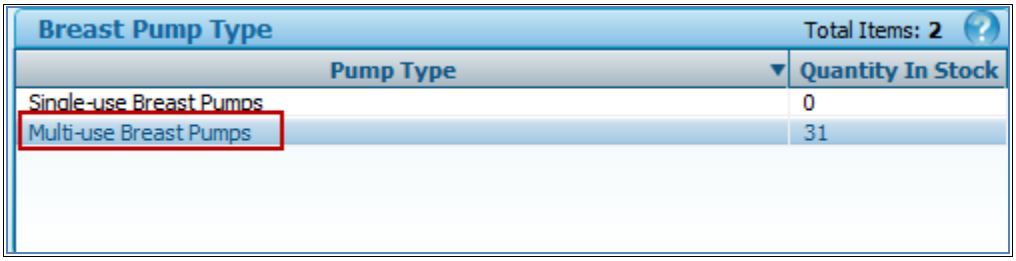
5. Click a breast pump under **Pump Type**. A note will display if you have selected a non-recommended breast pump.



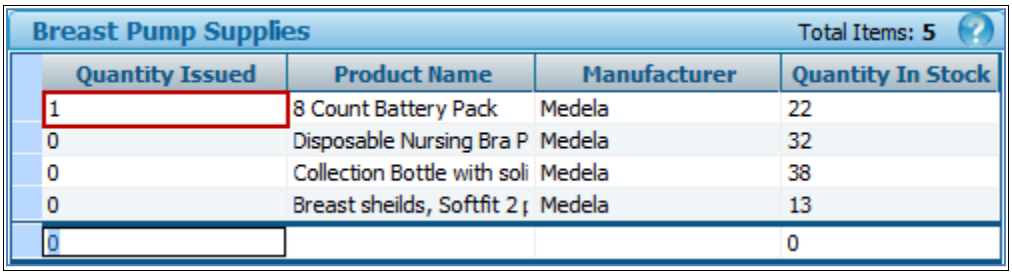


6. Click **OK**.

The Breast Pump Issuance screen displays allowing for another pump selection.



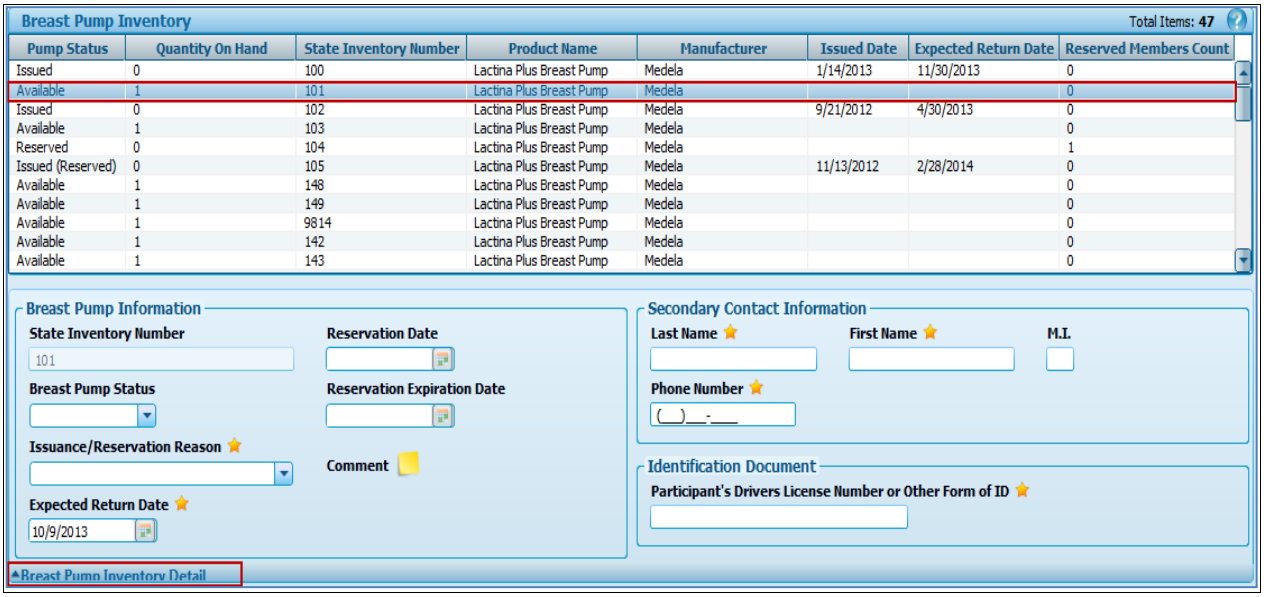
7. Under **Breast Pump Supplies**, enter the **Quantity Issued** for additional supplies needed.



The Breast Pump Supplies grid includes the Quantity Issued, Product Name, Manufacturer, and Quantity In Stock for additional breastfeeding supplies.

Click a column header to sort the items in the grid. Click and hold and drag and drop columns of information to reorganize the order of the columns in the grid.

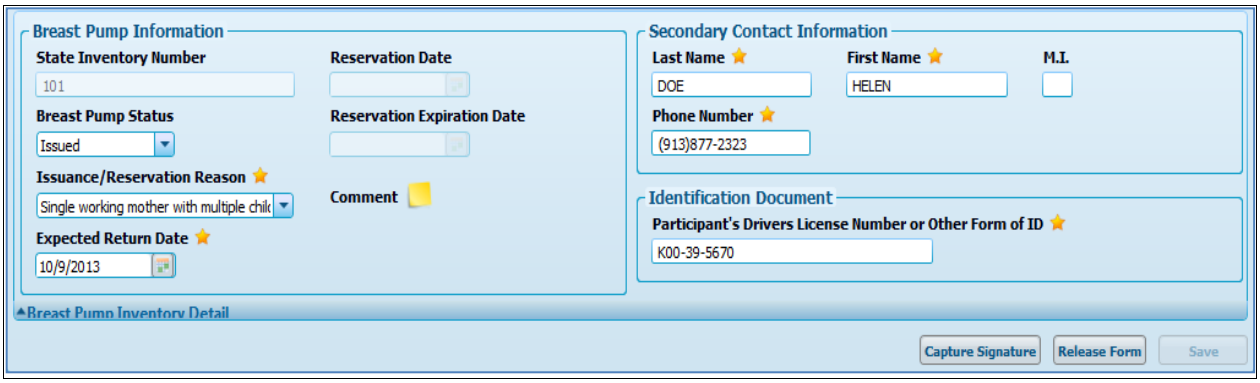
8. Under **Breast Pump Inventory**, click an available breast pump listing in the grid. The screen refreshes and displays the **Breast Pump Inventory Details**.



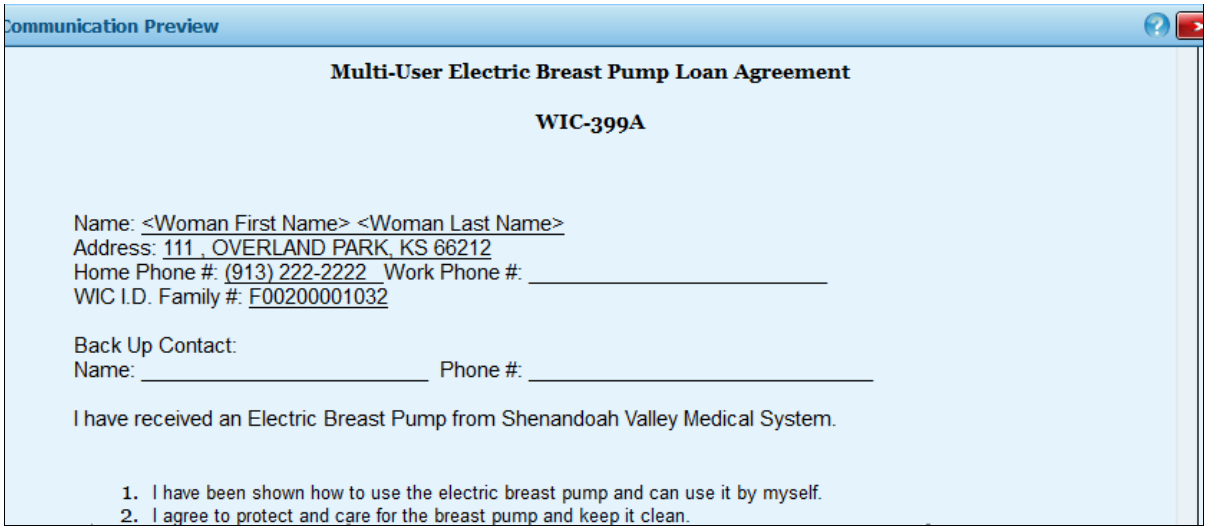
9. Enter the **Breast Pump Information** as follows:
   - Select the **Breast Pump Status**.
   - Select the **Issuance/Reservation Reason**.

10. Enter the **Secondary Contact Information** as follows:
   - Enter the **Last Name**.
   - Enter the **First Name**.
   - Enter the middle initial in **M.I.**
   - Enter the **Phone Number**.

11. Enter the **Identification Document** as follows:
   - Enter the **Participant's Drivers License Number or Other Form of ID**.



12. Click **Release Form**. The release information template displays.



The release form is printed for the participants review and signature. This can then be scanned into the family record. You will also have that participant sign electronically that the pump is now in the participant's possession.

13. Click **Capture Signature**. The **Capture Signature** screen displays.

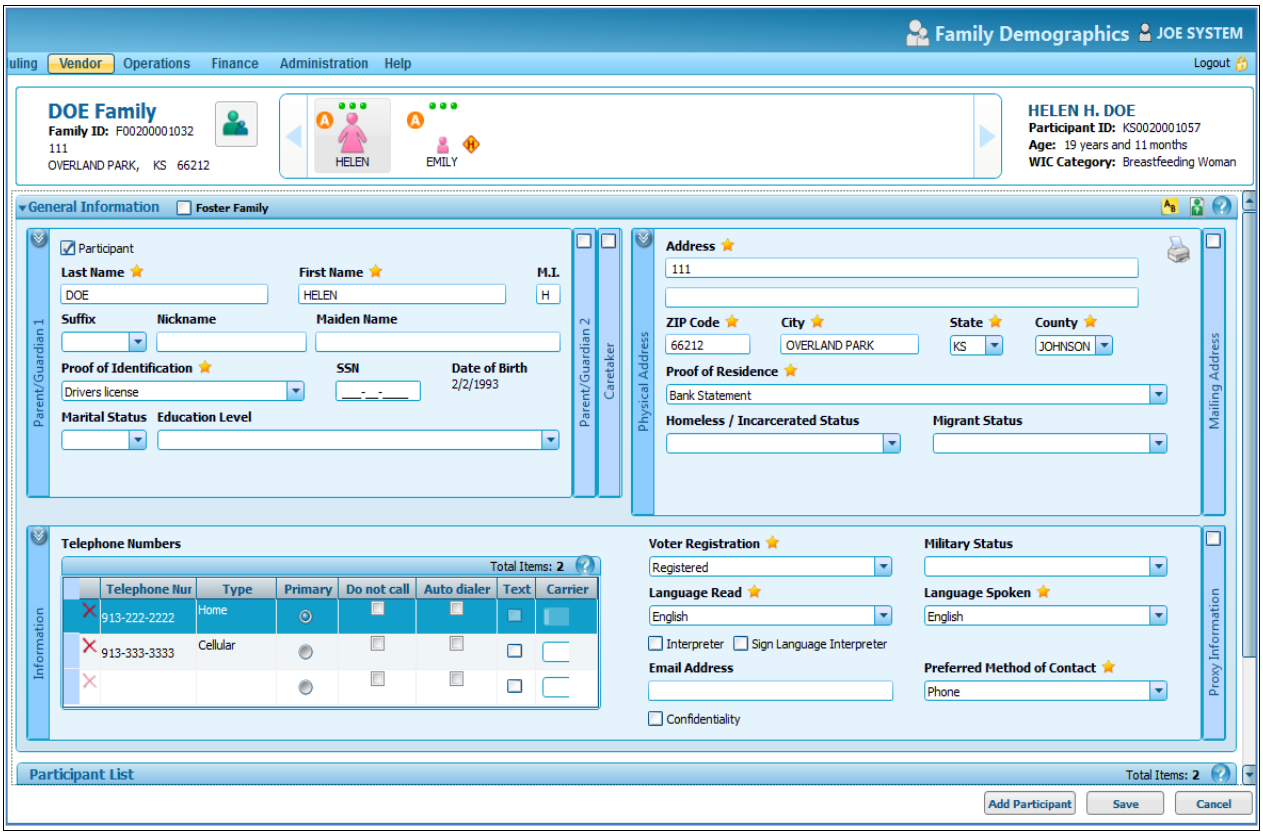
In order to save the participant's signature, Signature Pad software must be correctly installed and you must be connected to a signature device.

14. Enter a signature and click **Save**. The **Breast Pump Issuance** screen displays.
15. Click **Save**. A status message displays and the breast pump is issued or reserved (as indicated by the selected status).

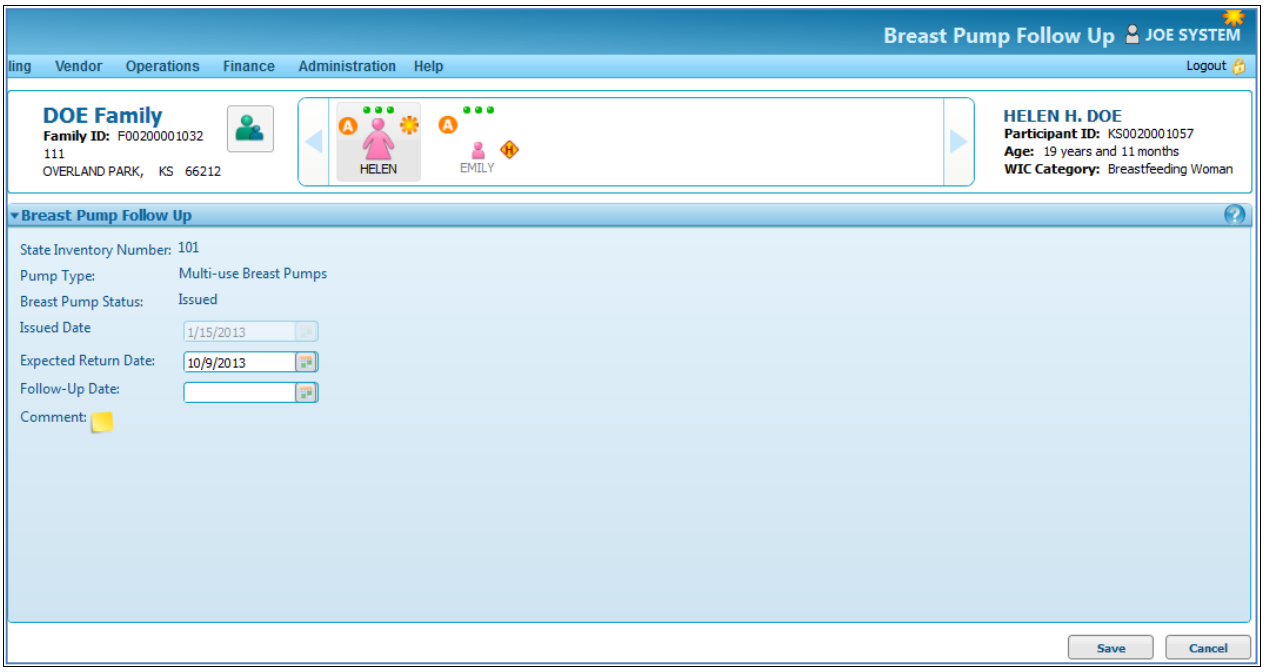
Task B. Following-Up on Breast Pump Issuances

Complete the following steps to perform this task:

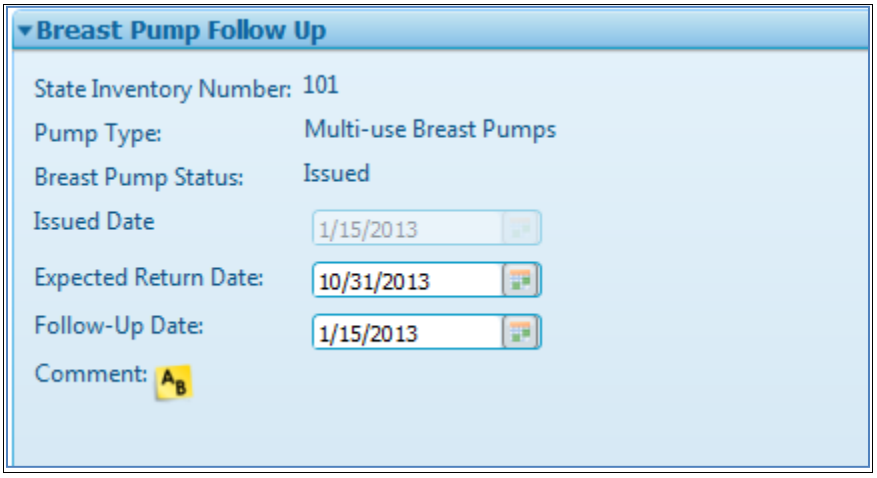
1. Search for and access a family record.



2. Go to **Family Services → Breastfeeding Support → Breast Pump Follow Up**. The **Breast Pump Follow Up** screen displays.



3. Enter or select the Expected **Return Date**.
4. Enter or select the **Follow Up Date**.
5. Add **Comment**, if applicable.

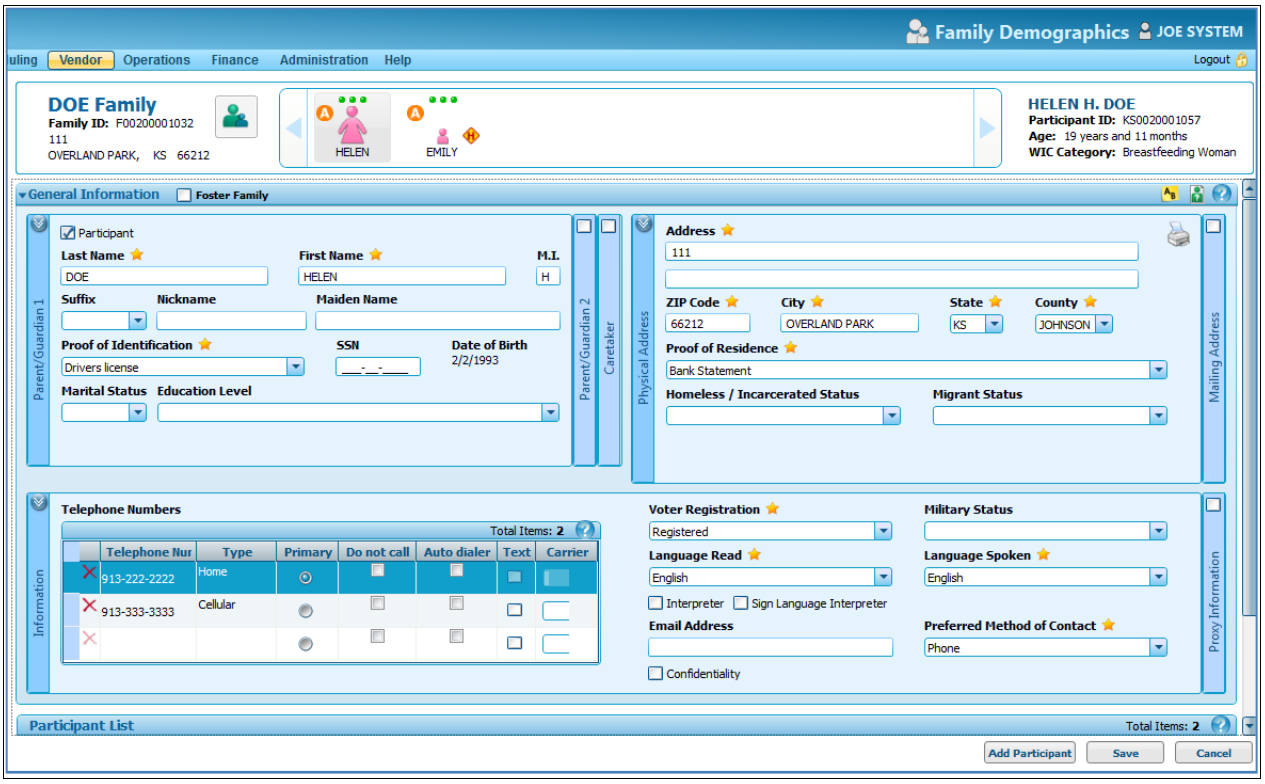


6. Click **Save**. A status message displays and the user remains on the **Breast Pump Follow Up** screen.

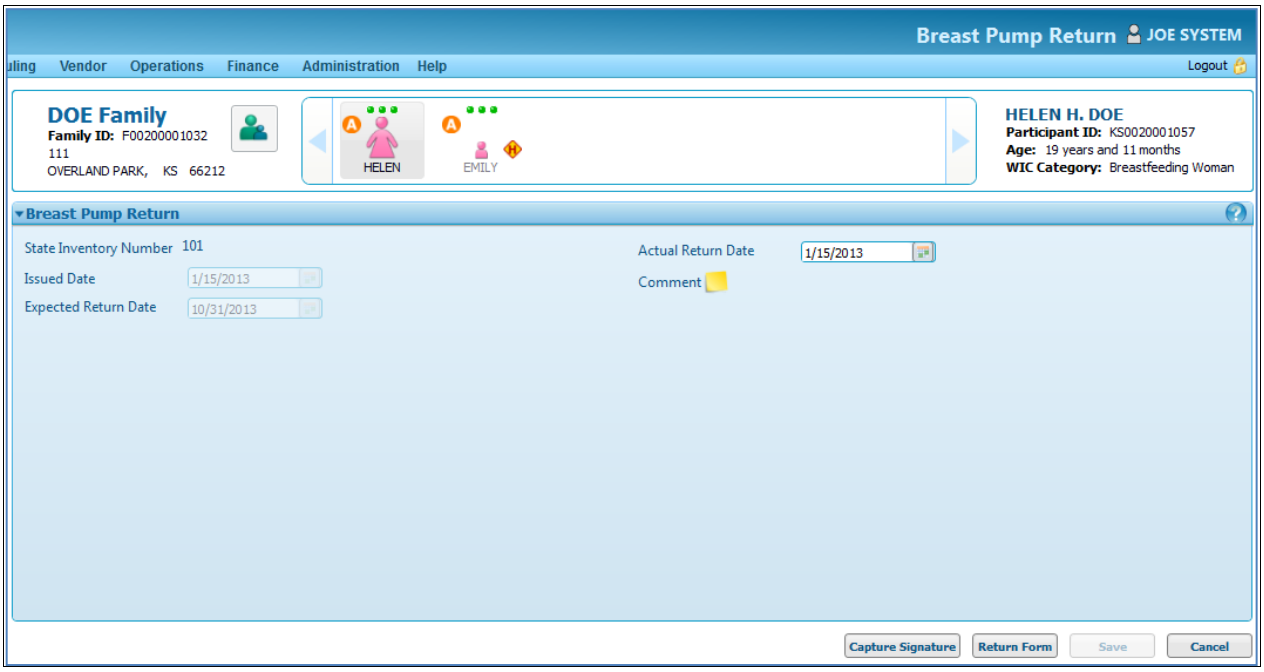
Task C. Returning a Breast Pump

Complete the following steps to perform this task:

1. Search for and access a family record.

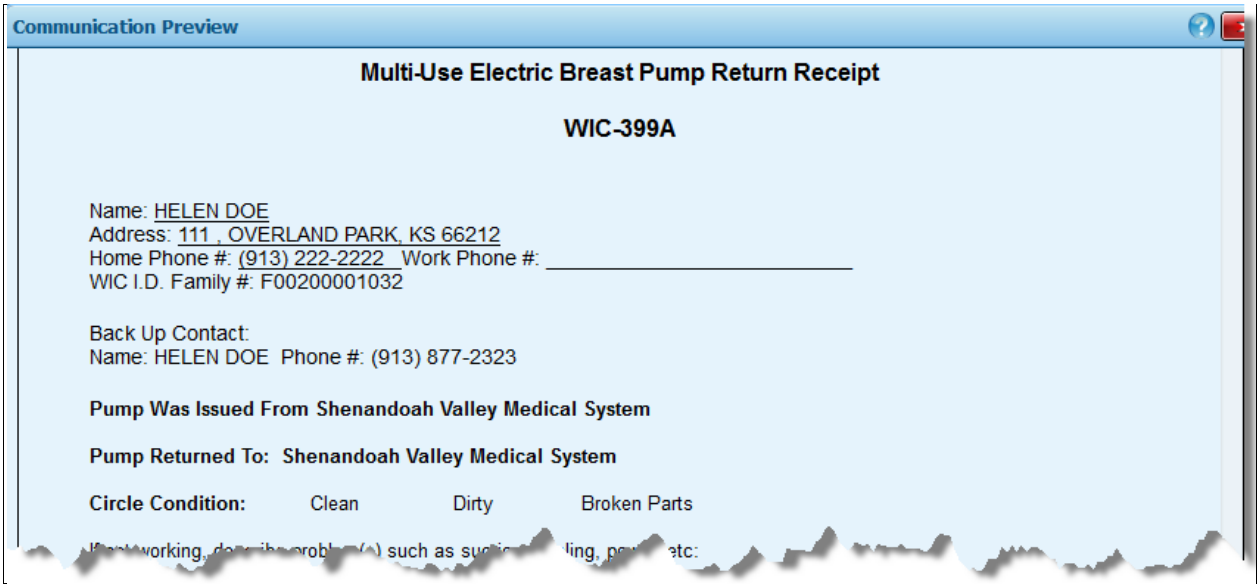


2. Go to **Family Services → Breastfeeding Support → Breast Pump Return**. The **Breast Pump Return** screen displays.



3. Enter or select the **Actual Return Date**.

4. Click **Return Form** button to view and/or print the breast pump return form. The return information template displays.

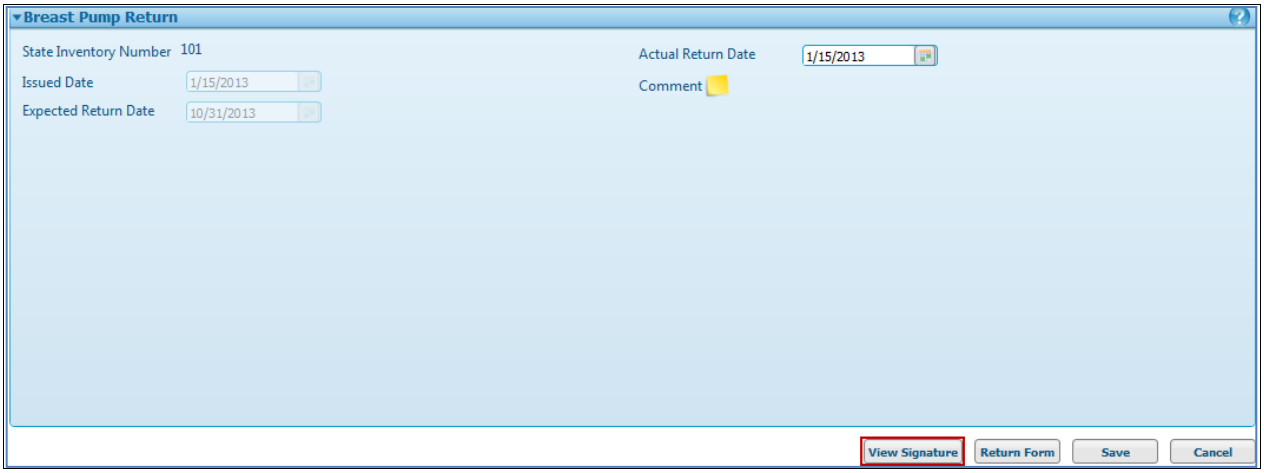


The printed form is signed by the participant. Staff can then scan the completed form into the family record.

5. Click **Capture Signature**. The **Capture Signature** screen displays.

6. Click **Save**. The user remains on the **Breast Pump Return** screen.

The participant's signature from an electronic signature device displays in the capture signature popup. The signature can be view by clicking the View Signature button.



Congratulations!

You have successfully completed the **Issuing**, **Reserving**, **Monitoring**, **and Returning Breast Pumps** process.

10- TRANSFER

Between Agency or Clinic

The **Between Agency or Clinic** screen is used to transfer selected individuals in a family between local clinics and agencies within the state. The user selects a statewide search to find the family. A statewide search ensures that a possible duplicate family record is not transferred. After verifying the family information including the current/receiving agency and clinic, the user selects the **Transfer** button to transfer the WIC family and all family members from the current agency/clinic to the receiving agency/clinic. This scenario describes the transfer of a family from one clinic to another clinic in state. The user must be logged into the clinic to which the family will be transferred.

This process includes the following task(s):

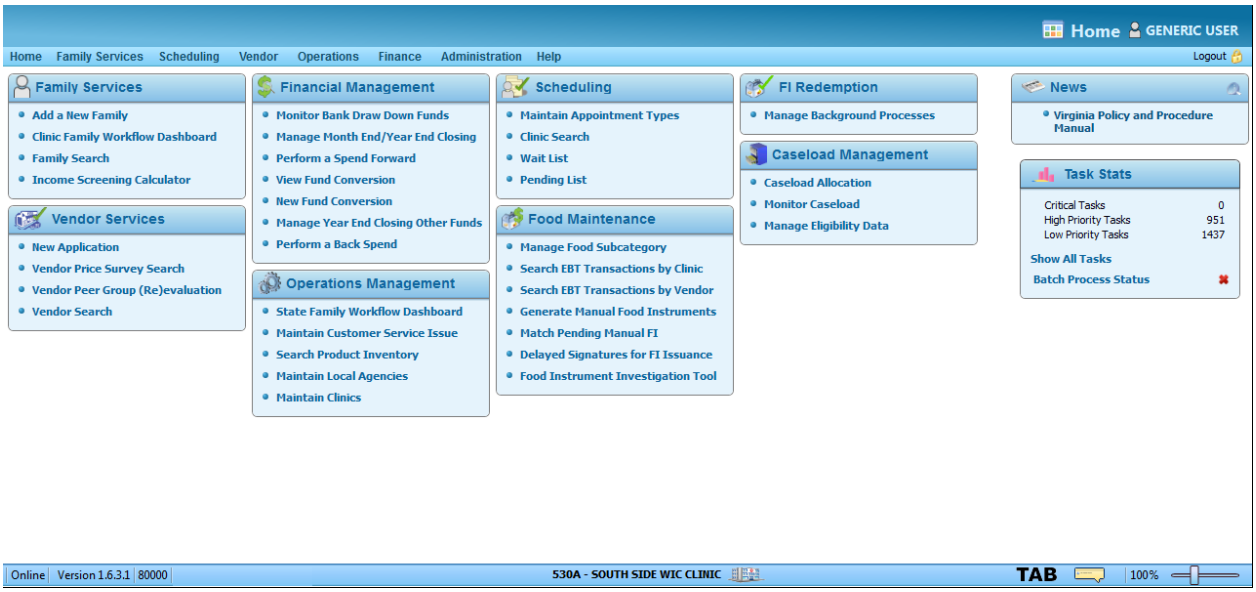
Task A. Logging into the Clinic Receiving the Family Record 10-2

Task B. Accessing the Family Record and Completing the Agency and/or Clinic Transfer 10-3

Task A. Logging into the Clinic Receiving the Family Record

Complete the following step to perform this task:

1. Log in to the clinic that is to receive the transferring family record.

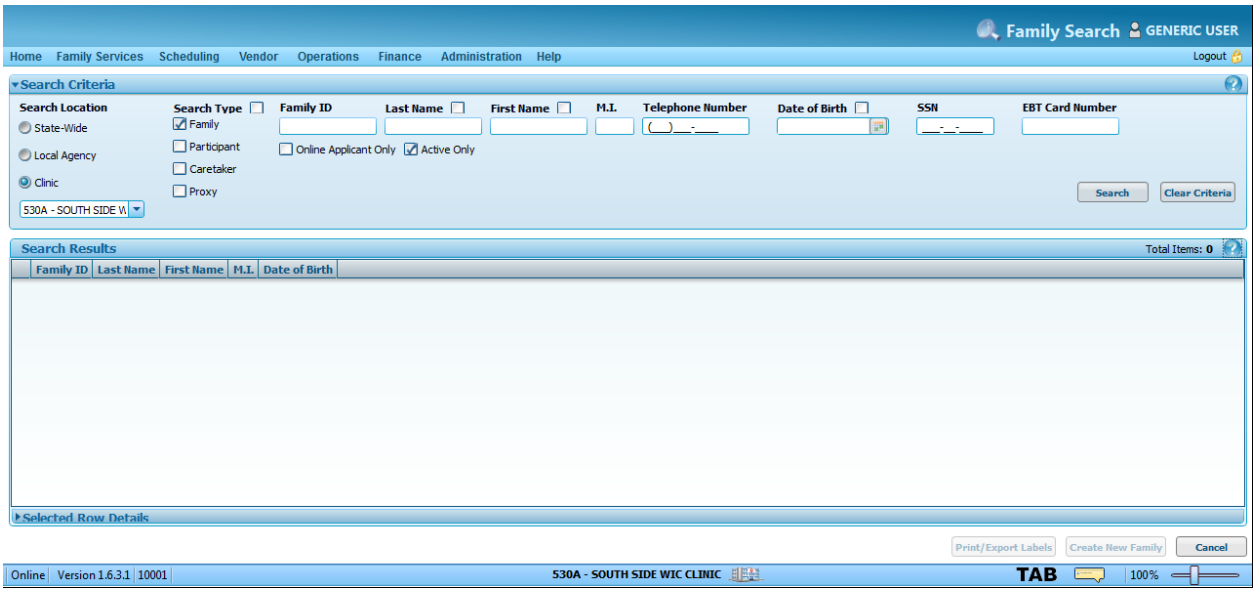


You need to be working in the clinic that will be receiving the transferred family.

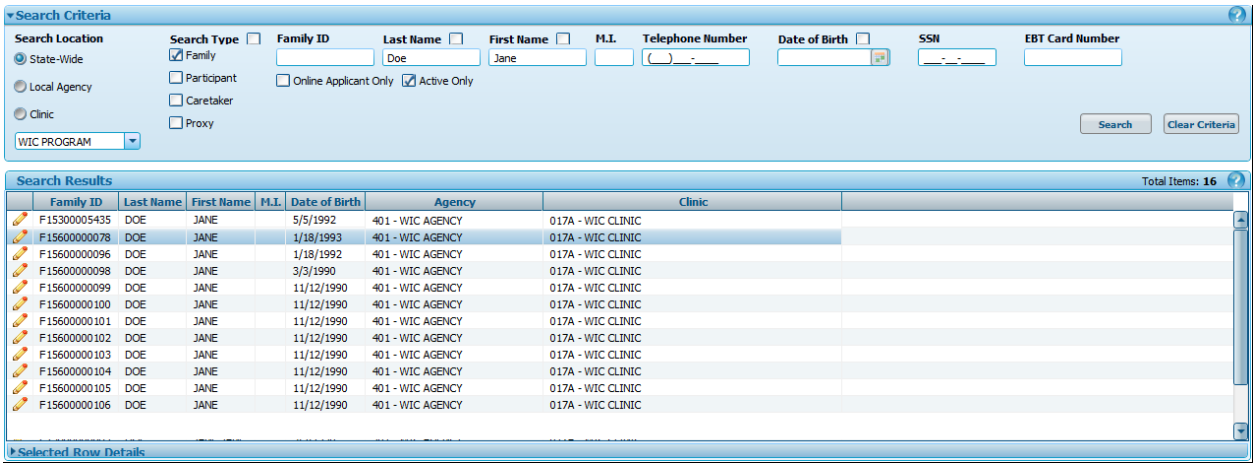
Task B. Accessing the Family Record and Completing the Agency and/or Clinic Transfer

Complete the following steps to perform this task:

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

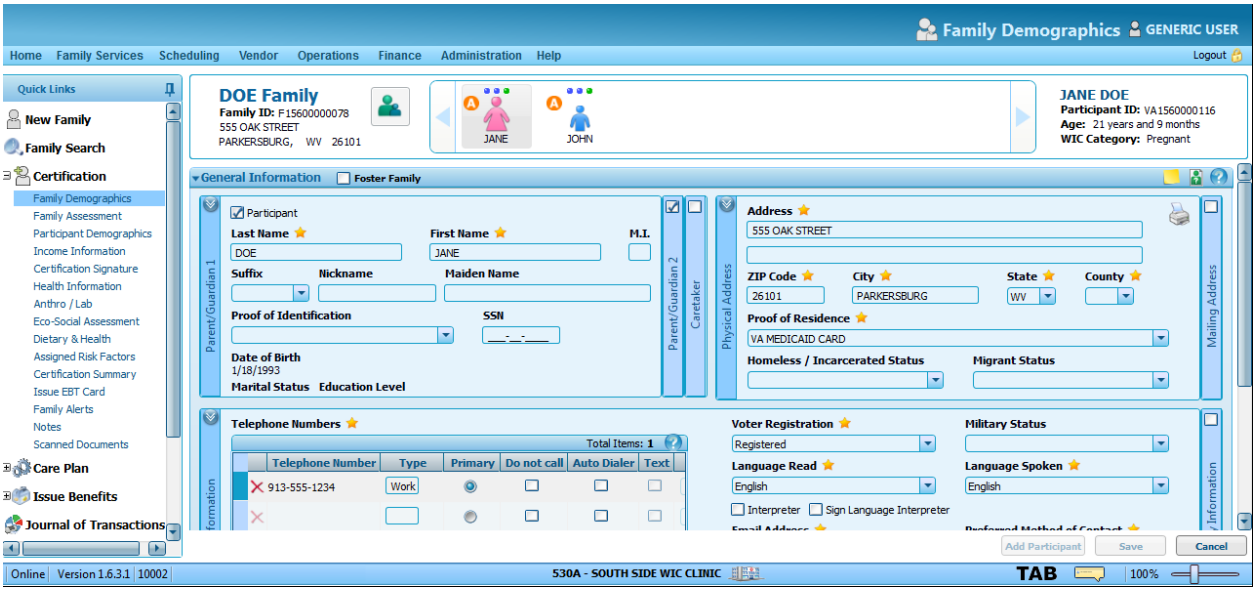


2. Conduct a statewide search for the family you want to transfer into your clinic. The **Search Results** grid displays the results of the search.



A statewide search will ensure that possible duplicate family records will be found and avoid transferring a duplicate record.

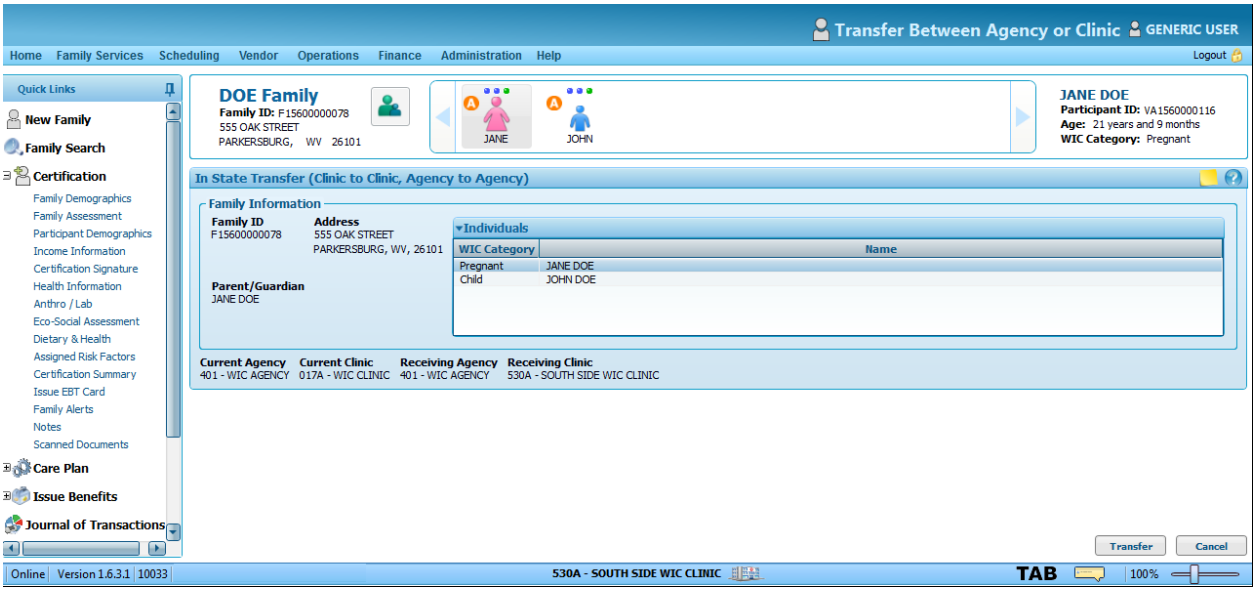
3. Select and access the desired family record.



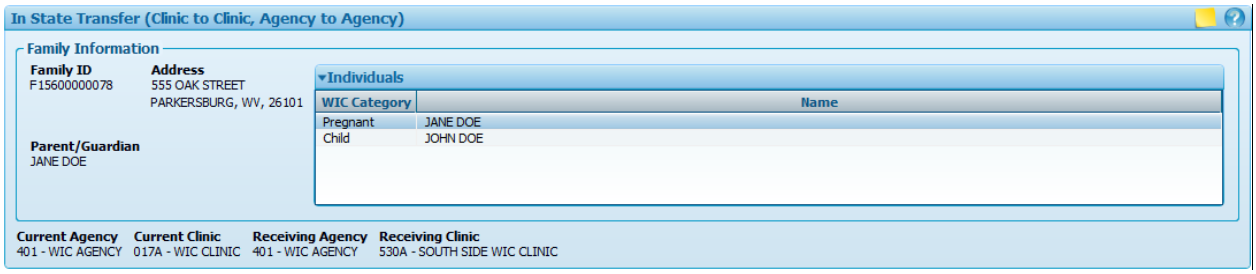
Examine the details for the family on the Family Demographics screen to confirm you have the correct family.

Since the record is currently assigned to another clinic site, screen elements (fields, check boxes, buttons, etc.) are disabled within the record. Complete the transfer to enable these items.

4. Go to **Family Services → Transfer → Between Agency or Clinic**. The **Between Agency or Clinic** screen displays.

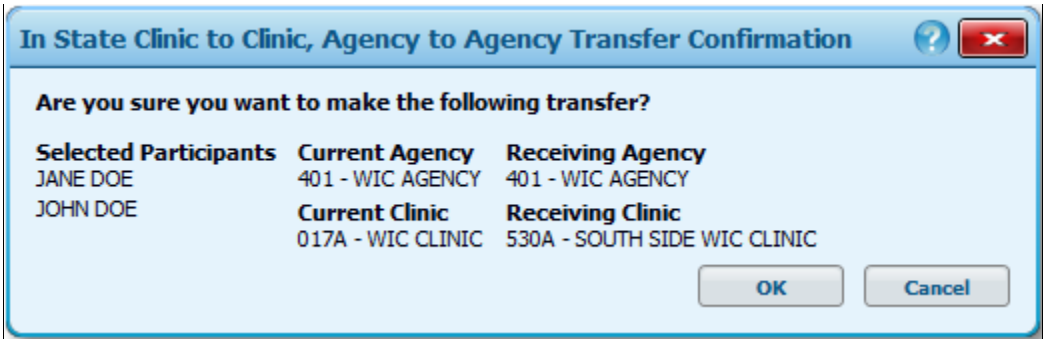


5. View the **In State Transfer (Clinic to Clinic, Agency to Agency)** container.

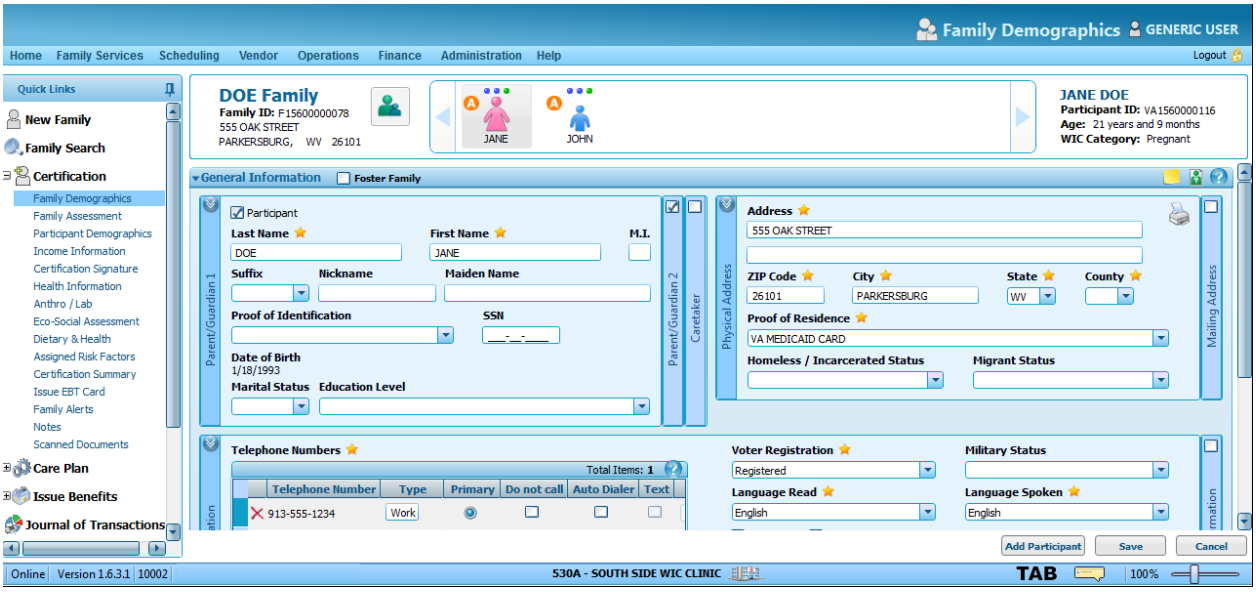


The In State Transfer (Clinic to Clinic, Agency to Agency) container displays certain family information, lists the Individuals in the family, and displays the Current Agency/Clinic along with the Receiving Agency/Clinic. Verify the information before proceeding.

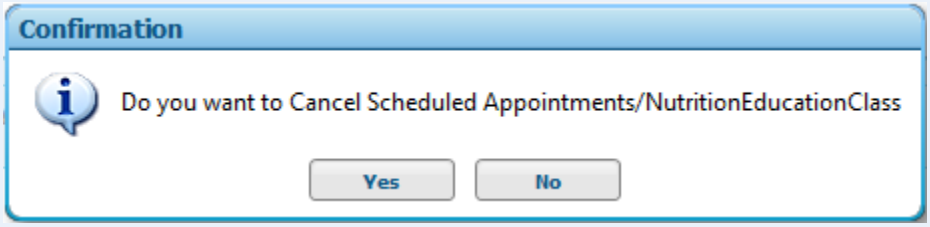
6. Click **Transfer**. The **In State Clinic to Clinic, Agency to Agency Confirmation** screen displays.



7. Review the information on the **In State Clinic to Clinic, Agency to Agency Confirmation** screen to confirm the information is correct and then click **OK** to complete the transfer. A status message displays indicating the agency/clinic transfer was successful and the **Family Demographics** screen displays.

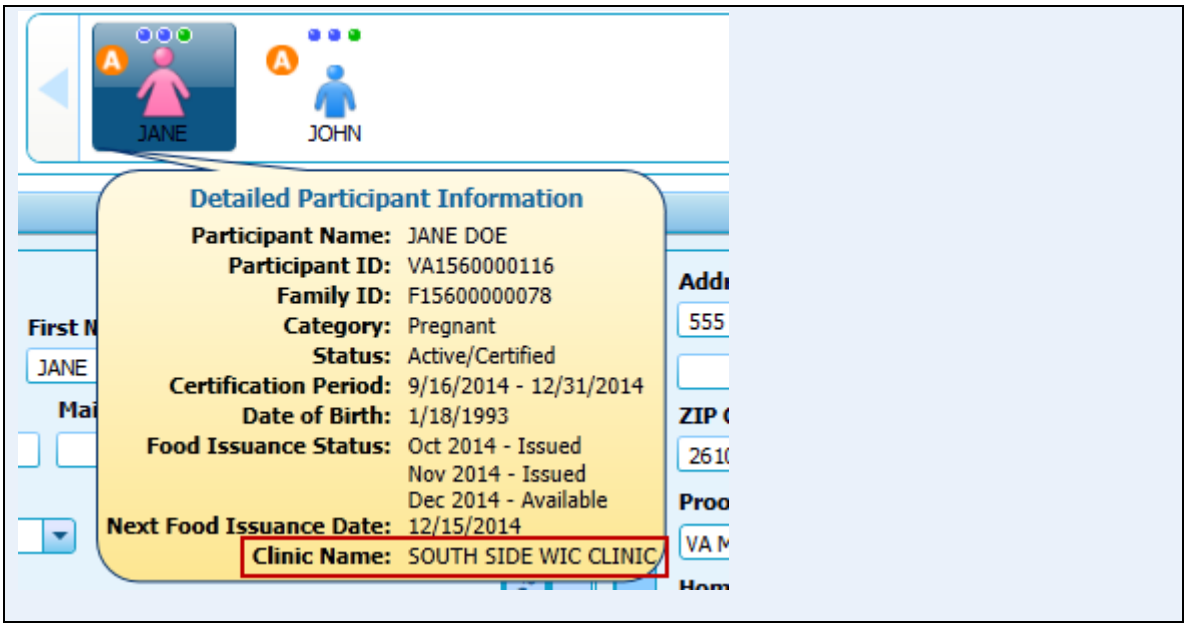


The user has the opportunity to cancel appointments scheduled at the originally assigned clinic if appointment(s) existed.



The transfer process is complete. Now that the record is assigned to the selected clinic site, screen elements (fields, checkboxes, buttons, etc.) are enabled.

To review information about the member including the currently assigned clinic, use the mouse cursor and hover it over an icon in the Family Header.



Congratulations!

You have successfully completed the Transfer **Between Agency or Clinic** process.

Between Families: Transferring a Participant Between Two Existing Family Records

This scenario describes the transfer of a participant in state from one existing family record to another existing family record. The participant's family records are delinked from the current family and linked to the target family. Crossroads enforces the concept of only being able to pull families from one clinic to another. The user will need to be logged into the clinic where the participant will be transferred.

This process includes the following task(s):

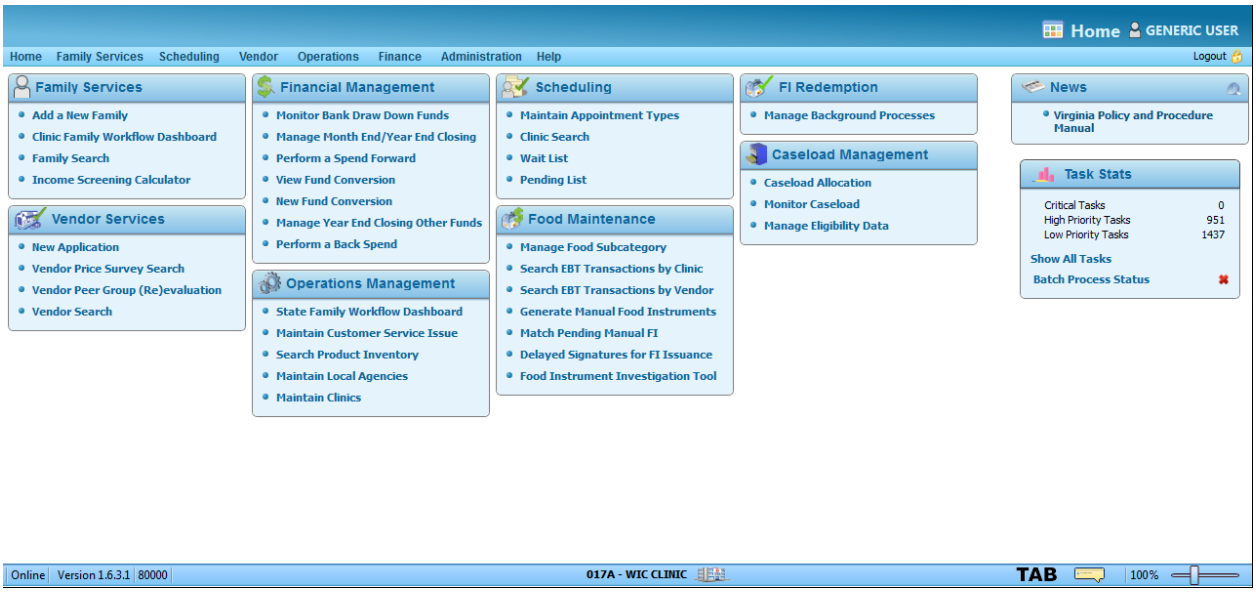
Task A. Logging into the Clinic where the Participant will be Transferred 10-9
Task B. Using Family Search to Find the Participant to Transfer.....10-10
Task C. Voiding Future Benefits Prior to the Transfer.....10-12
Task D. Selecting an Existing Family Record 10-15
Task E. Re-issuing Future Benefits of the Original Family.....10-19
Task F. Re-issuing Future Benefits of the Receiving Family 10-21

The following tasks will focus on transferring a Participant between Existing Families.

Task A. Logging into the Clinic where the Participant will be Transferred

Complete the following step to perform this task:

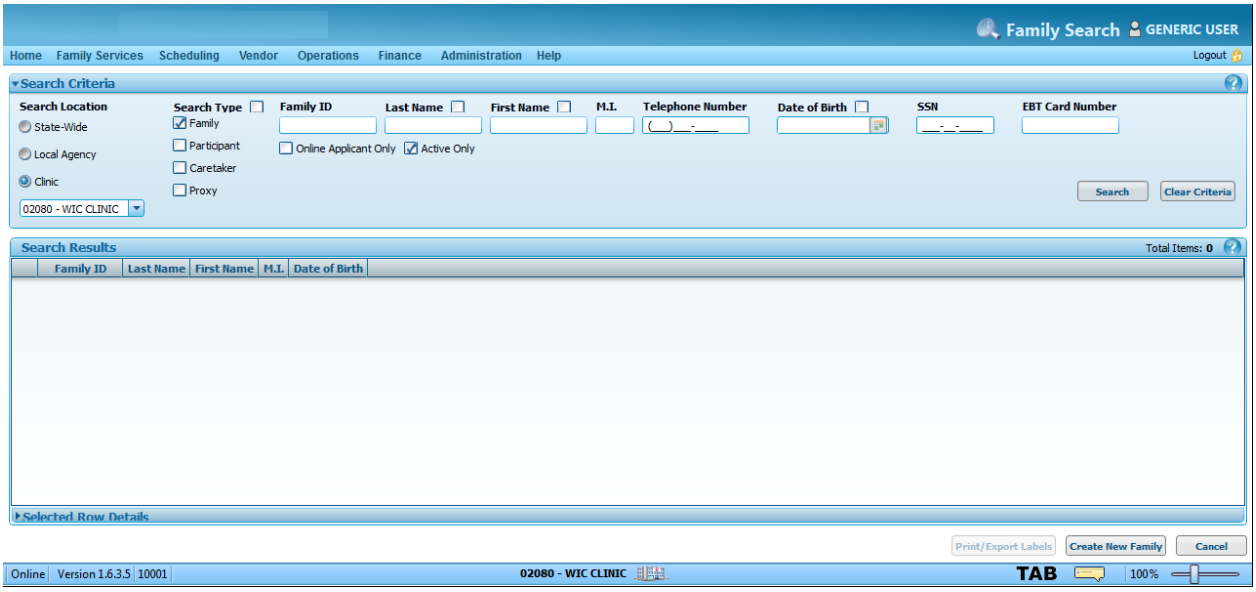
1. Log into your clinic location that will be receiving the transferring participant.



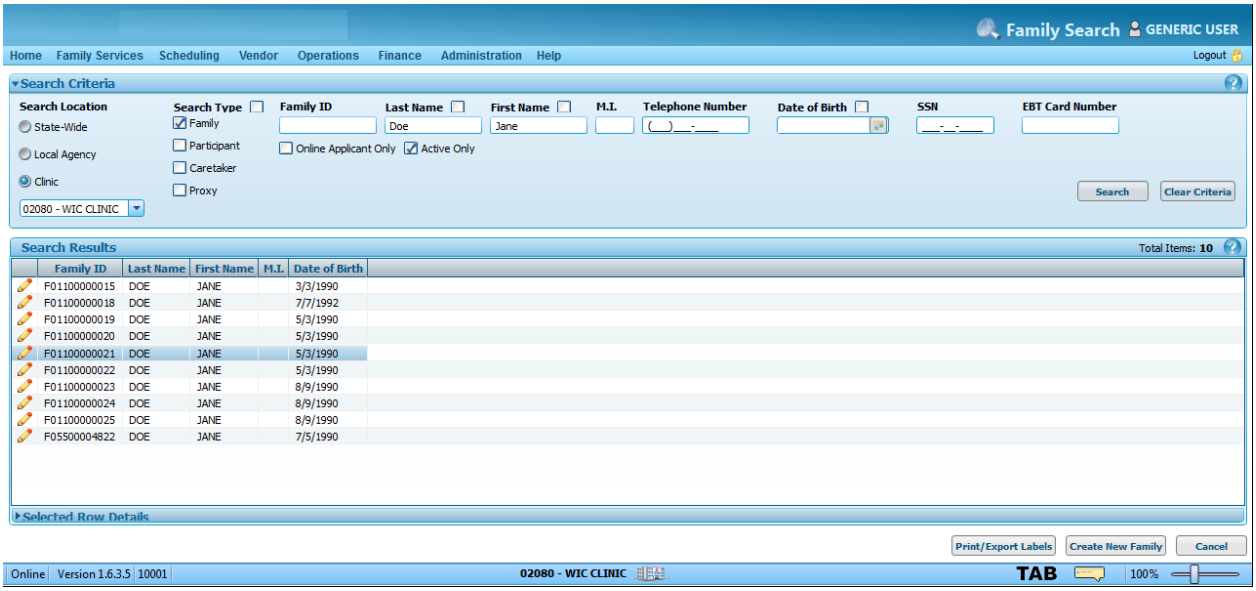
Task B. Using Family Search to Find the Participant to Transfer

Complete the following step to perform this task:

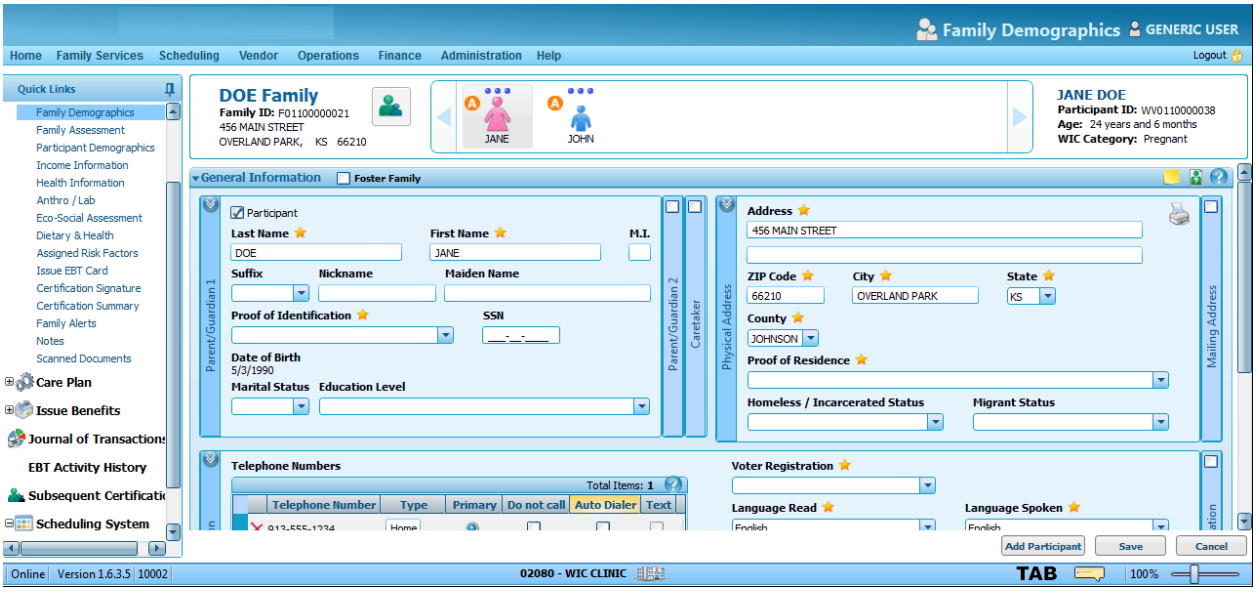
1. Go to **Family Services →Family Search.** The **Family Search** screen displays.



2. Enter the desired search criteria and click Search. The results are displayed in the Search Results grid.



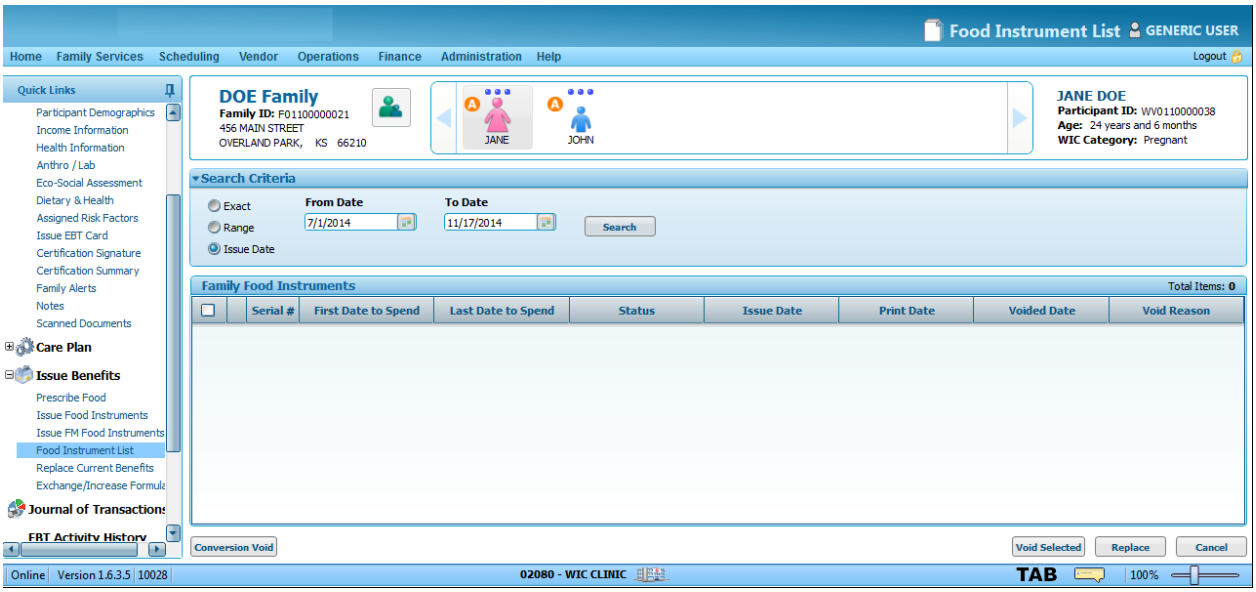
3. Access or open the family record that includes the member to be transferred.



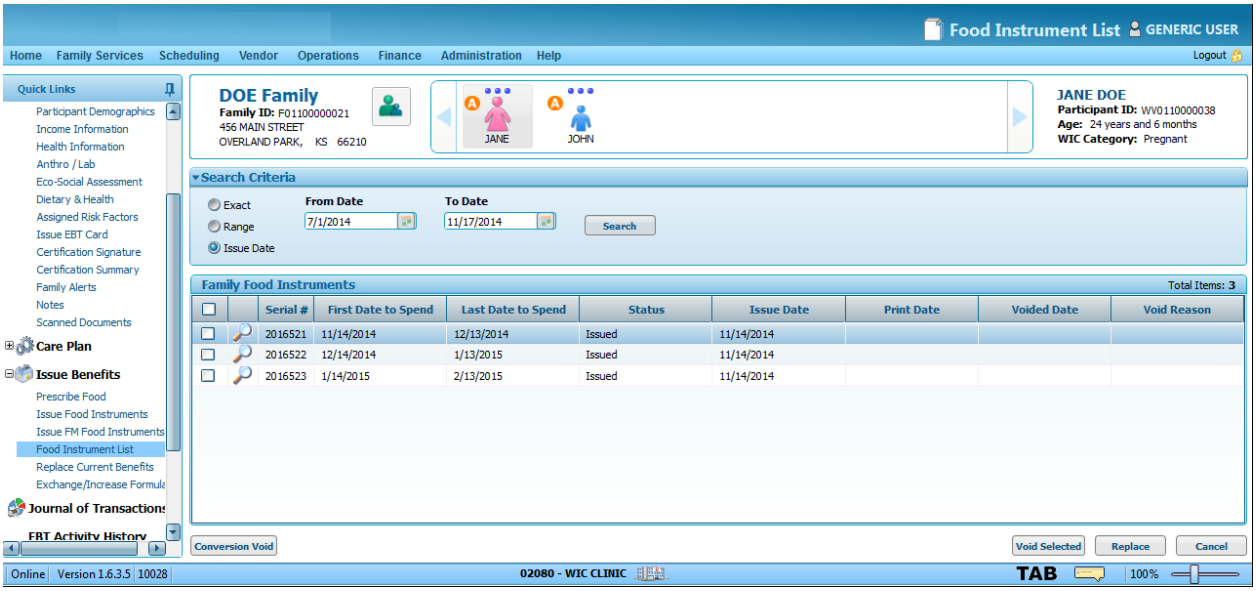
Task C. Voiding Future Benefits Prior to the Transfer

Complete the following steps to perform this task:

1. Go to **Family Services → Issue Benefits →Food Instrument List**. The **Food Instrument List** screen displays.



2. Click **Search**. The screen is refreshed and displays the benefits within the defined search range.



In the example above, both members benefits are aggregated (added together) for each month. The best practice for states utilizing paper food instruments is to void the future month's benefits prior to transferring members and then re-issue the benefits after the transfer has occurred. For

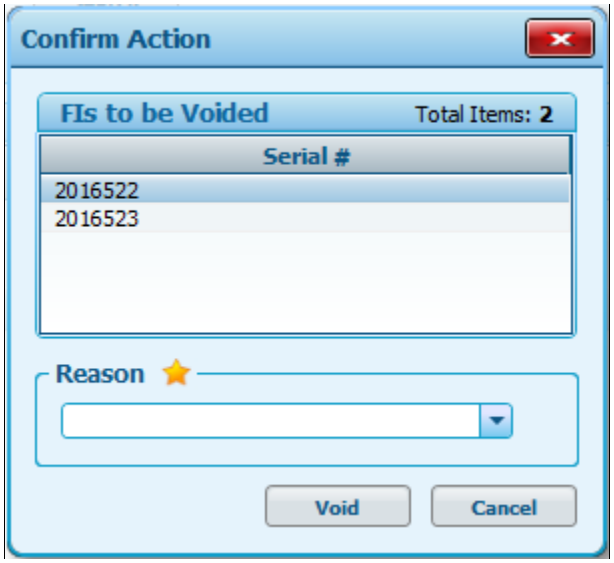
states utilizing EBT food instruments, future benefits must be voided prior to the transfer.

3. Within the **Family Food Instruments** grid, select the future month's benefits.

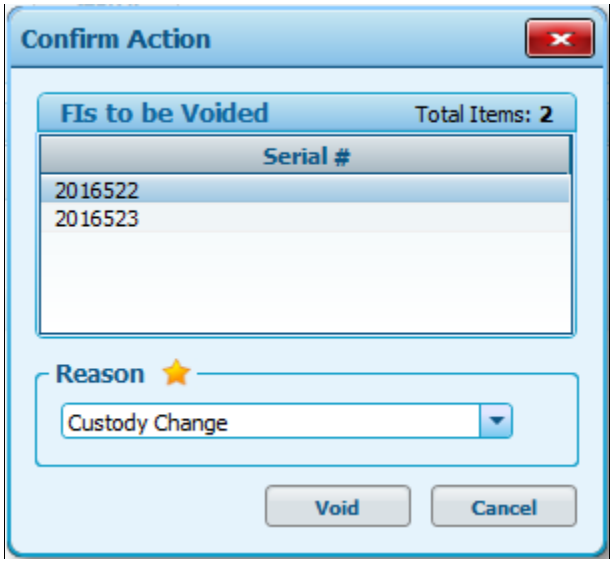
Family Food Instruments

		Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date
☐		2016521	11/14/2014	12/13/2014	Issued	11/14/2014
☑		2016522	12/14/2014	1/13/2015	Issued	11/14/2014
☑		2016523	1/14/2015	2/13/2015	Issued	11/14/2014

4. Click **Void Selected**. The **Confirm Action** screen displays.



5. Select the **Reason** for voiding the benefits.

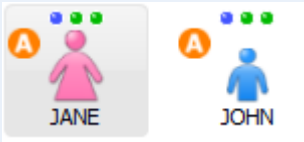


6. Click **Void**. A status message displays indicating success and the **Family Food Instruments** grid is updated.

Family Food Instruments — Total Items: 3

		Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
☐	🔍	2016521	11/14/2014	12/13/2014	Issued	11/14/2014			
☐	🔍	2016522	12/14/2014	1/13/2015	Voided	11/14/2014		11/17/2014	Custody Change
☐	🔍	2016523	1/14/2015	2/13/2015	Voided	11/14/2014		11/17/2014	Custody Change

Each member icon is updated within the Family Header and indicates available for future benefit months. (Blue dots indicate issued while green dots indicate availability.)



7. Make note of the **First Date to Spend** date of the current family.

The First Date to Spend date(s) is driven by the Family Issuance Date associated to the family. In this example, notice how each month of benefits begins on the 14th of the month:

11/14/2014

12/14/2014

01/14/2015

When completing a transfer to an established WIC family, it is important to consider the impact of a possible change in Family Issuance Day. Crossroads uses the Family Issuance Day to determine the benefit periods for members of the family.

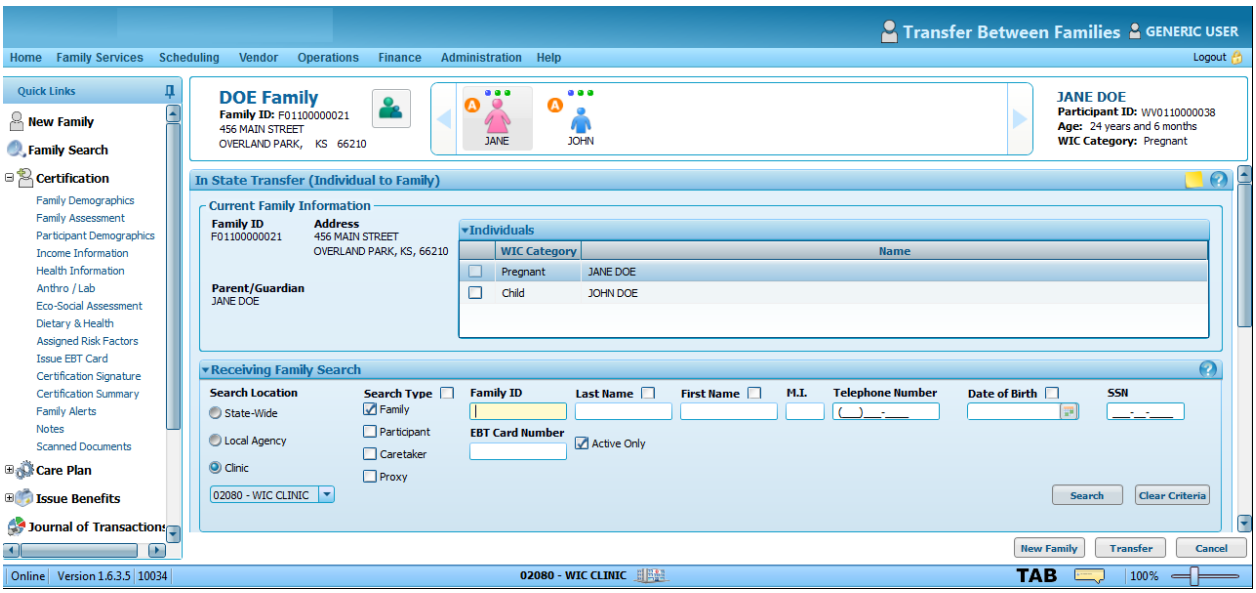
If the transfer of an individual causes a change in that individual's issuance day, there is a gap or overlap of benefit periods. For example, if the participant had an issuance day of the 5th and transfers to a family with an issuance day of the 10th, the transferring individual would have benefits that run through the 4th but would not be available for issuance of benefits in the new family until the 10th. To prevent this issue, Crossroads will automatically establish the Family Issuance Day to be equal to the current family's Family Issuance Day when transferring to a new WIC family and when transferring to an established WIC family that is eligible to change their Family Issuance Day (they have no current or future benefits).

If it is not possible to maintain the same Family Issuance Day and the result is a gap between benefit periods, Crossroads will issue benefits to cover this period as part of the transfer process.

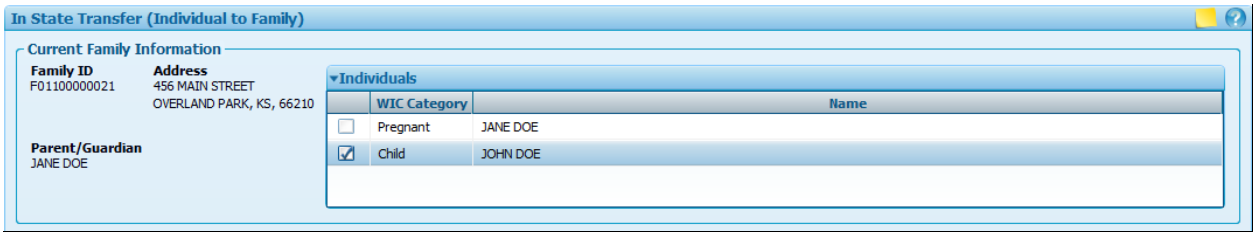
Task D. Selecting an Existing Family Record

Complete the following steps to perform this task:

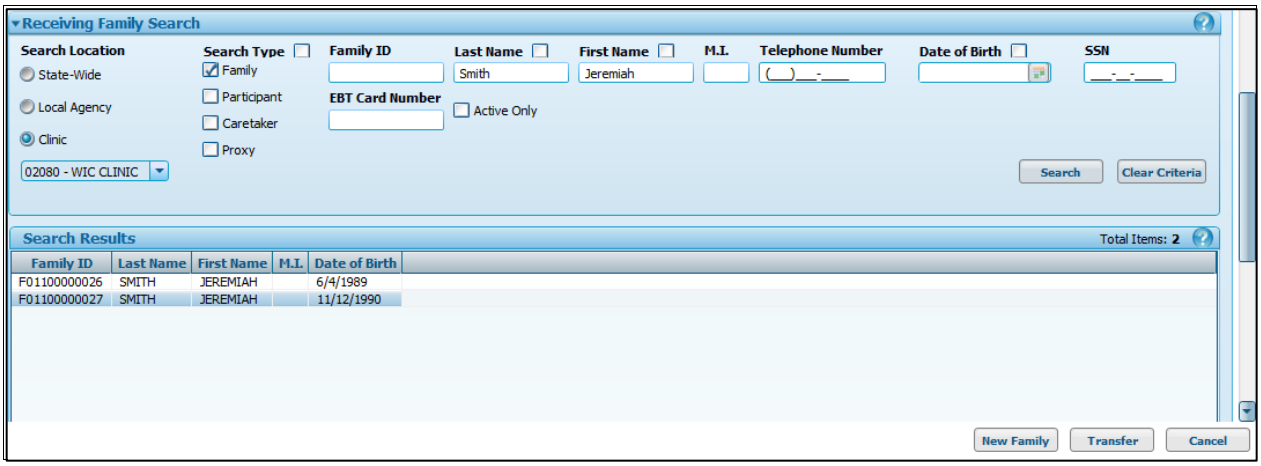
1. Go to **Family Services →Transfer →Between Families**. The **Transfer Between Families** screen displays.



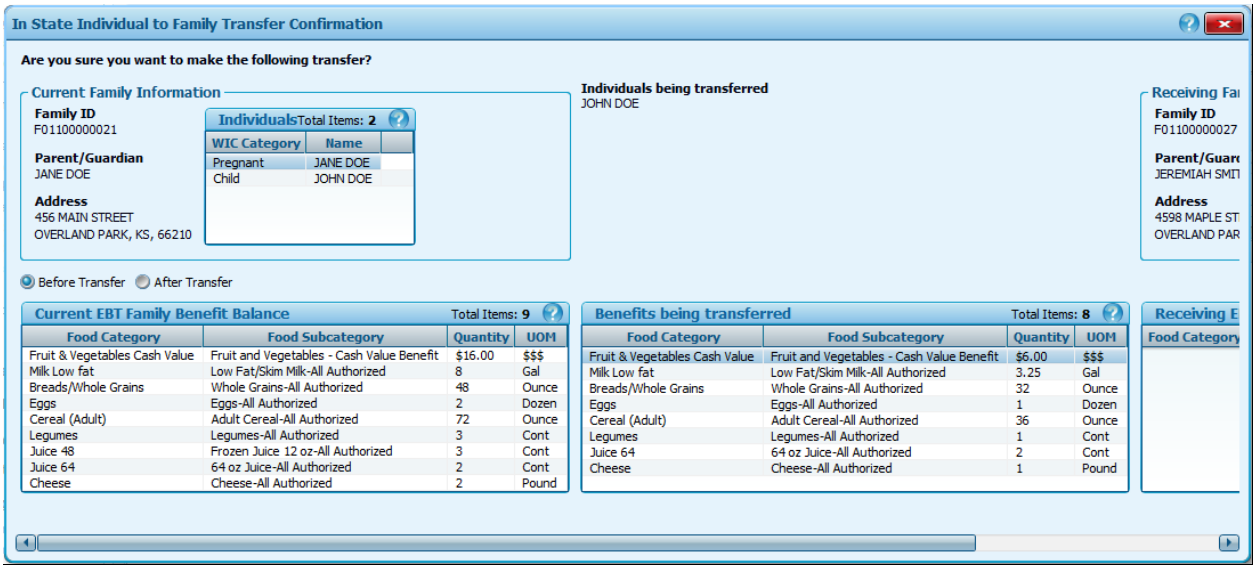
2. Under **Current Family Information**, select the participant who will be transferring to a new family.



3. Under **Receiving Family Search**, conduct a search for the family that is receiving the selected participant(s).



4. Click **Save**. The **In State Individual to Family Transfer Confirmation** screen displays when there is no gap in benefits.

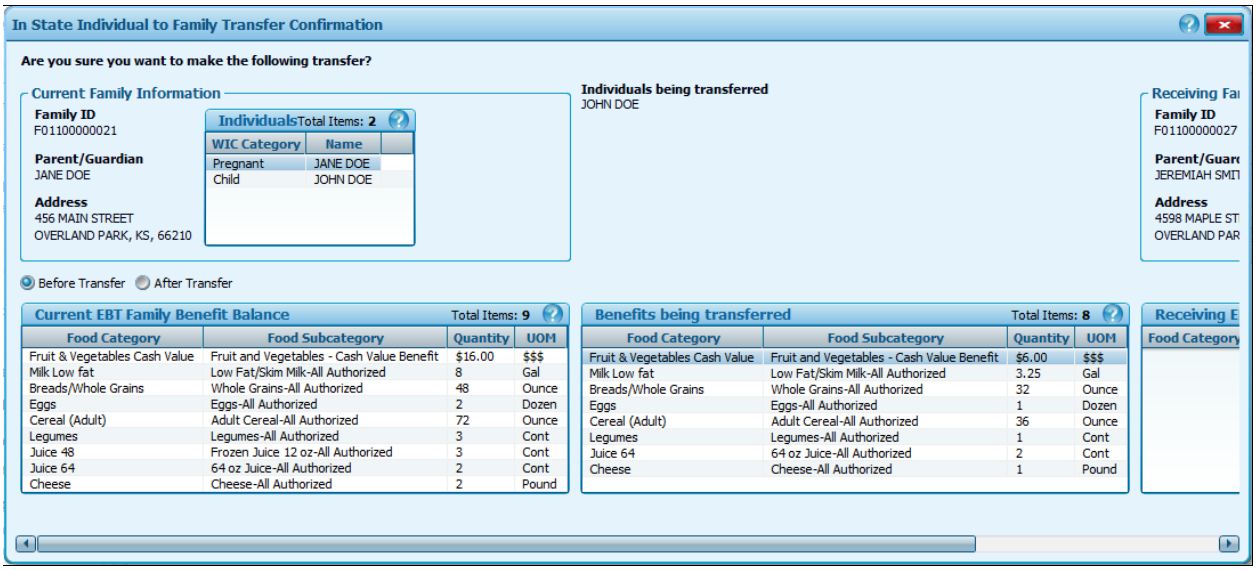


This screen displays only for states configured for EBT issuance. Since benefits are aggregated together, the benefits belonging to the transferring member must be removed from the current family and transferred to the receiving family. For states configured for paper food instrument issuance benefits are not transferred.

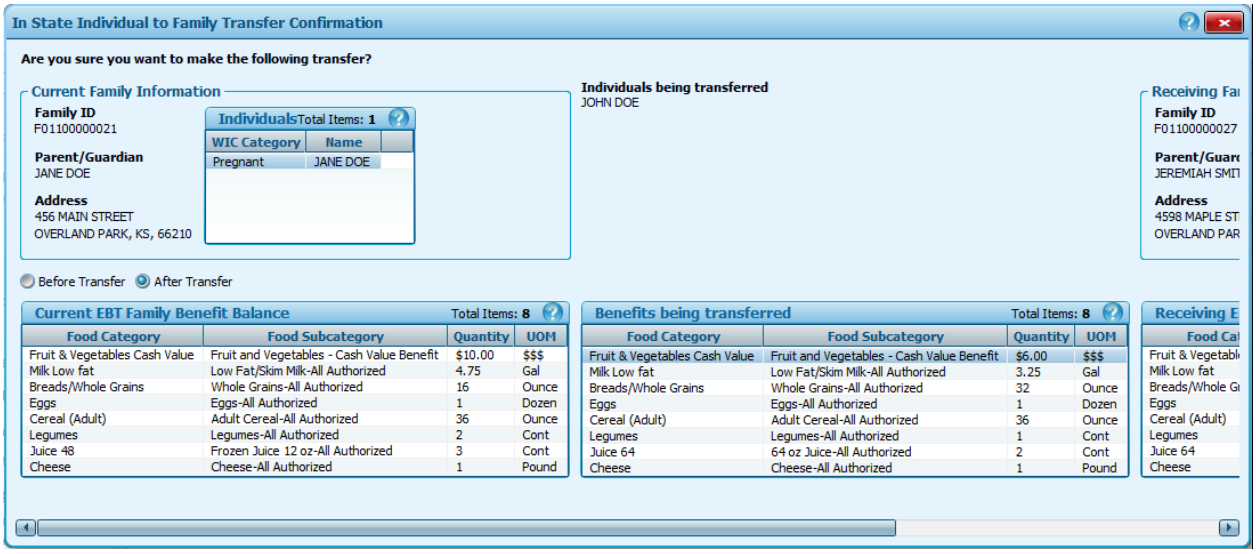
The screen displays information about the current family, the receiving family, the individual(s) to be transferred to the receiving family, and the benefits for each family (current and receiving).

5. Select the **Before Transfer** and **After Transfer** radio buttons to view the movement of benefits prior to the transfer and after the transfer takes place.

- Before Transfer

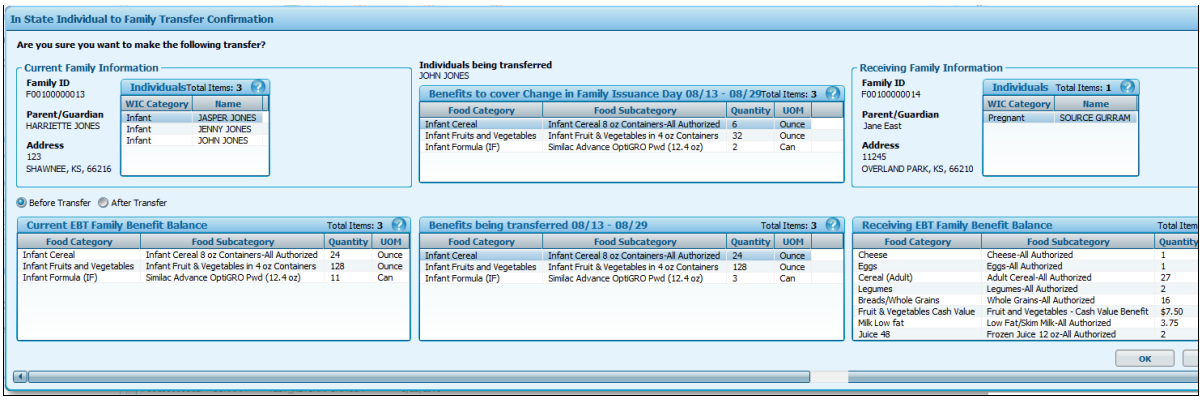


- After Transfer

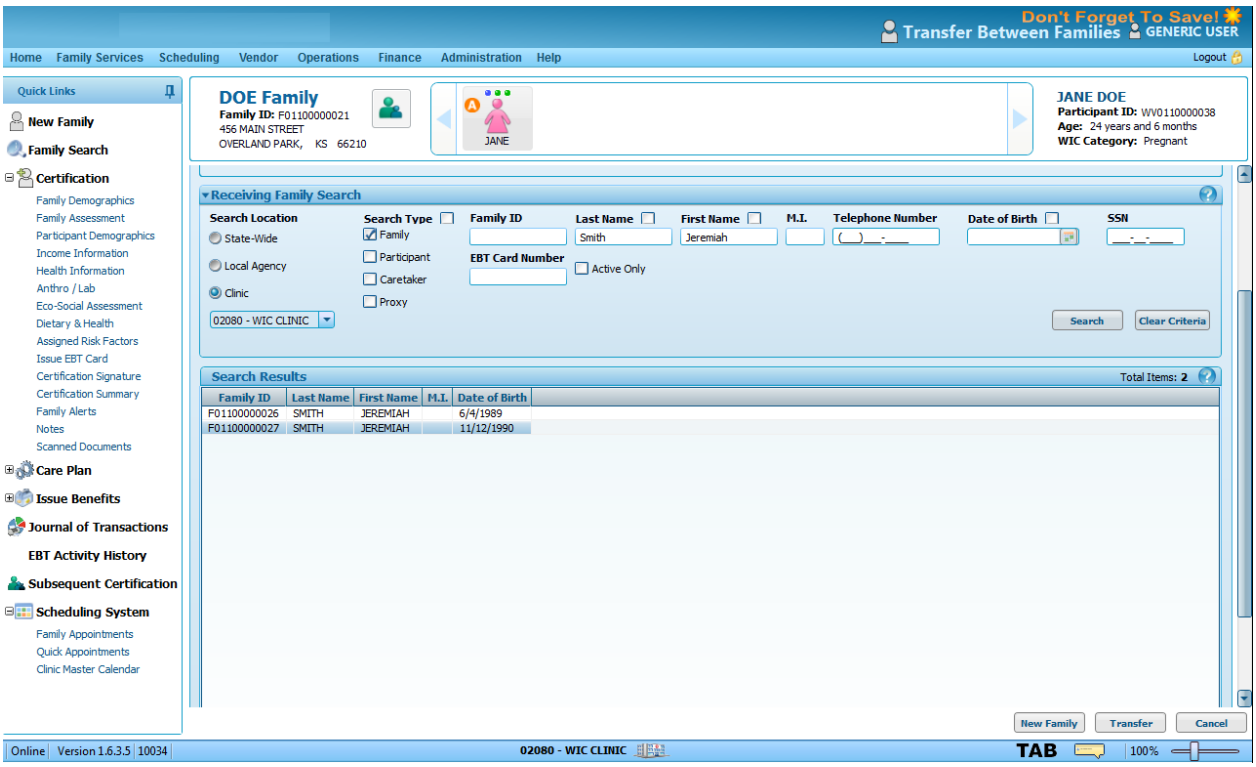


When Before Transfer is selected, the screen displays benefits within the Current EBT Family Benefit Balance and Benefits being transferred grids only. When After Transfer is selected, the screen displays what benefits remain within the current family, the transferring benefits, and the benefits that will be available to the receiving family.

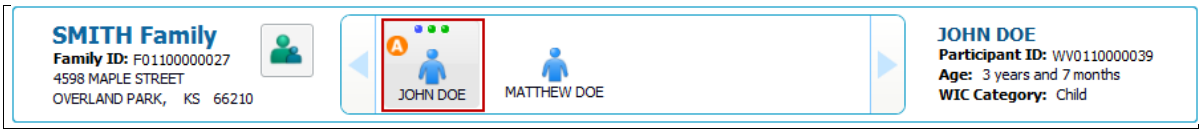
If a participant is transferred to an existing family with current or future benefits, the system will create a gap benefit to cover the timeframe when their current benefits will end and the new family's benefits begin.



6. Review the information on the screen and click **OK** to complete the transfer. A status message displays indicating success, you are returned to the **Transfer Between Families** screen, and the participant(s) selected for transfer are removed from the Family Header.



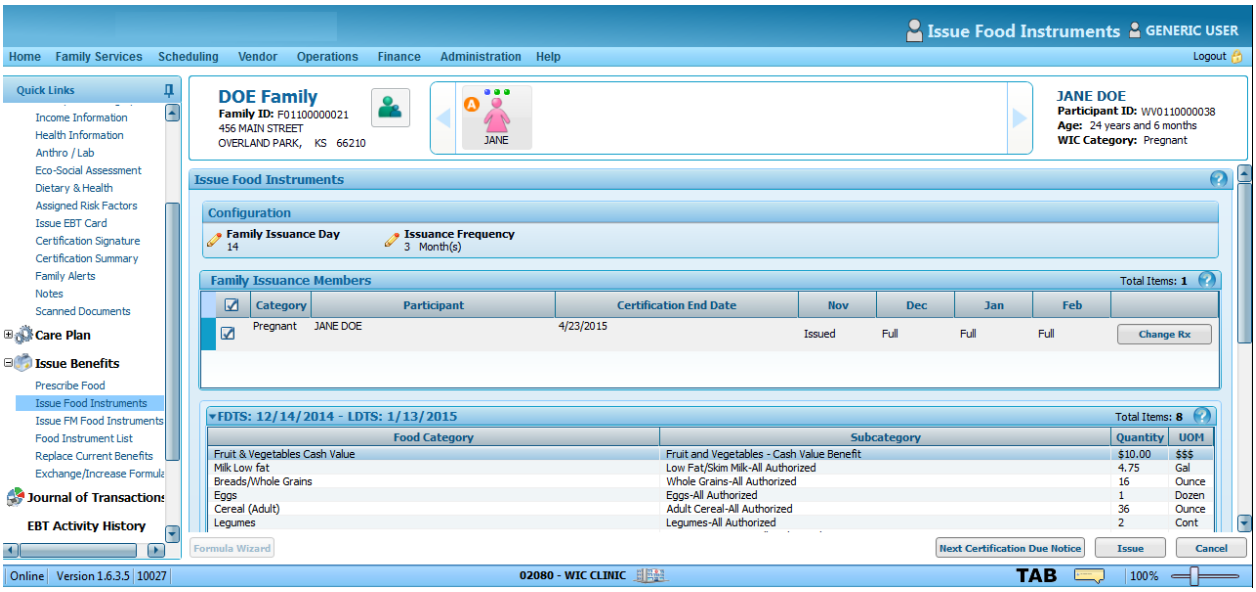
The participant(s) that were marked for transfer have been merged into the selected family record. See the example below.



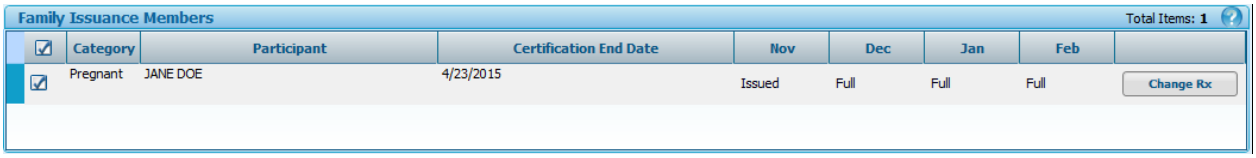
Task E. Re-issuing Future Benefits of the Original Family

Complete the following steps to perform this task:

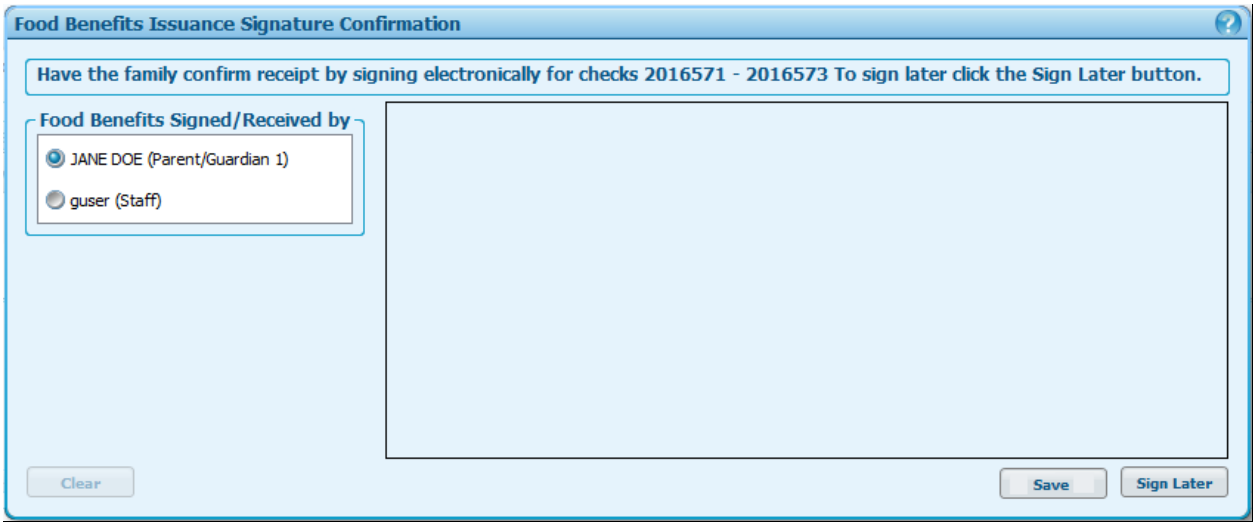
1. Go to **Family Services →Issue Benefits →Issue Food Instruments**. The **Issue Food Instruments** screen displays.



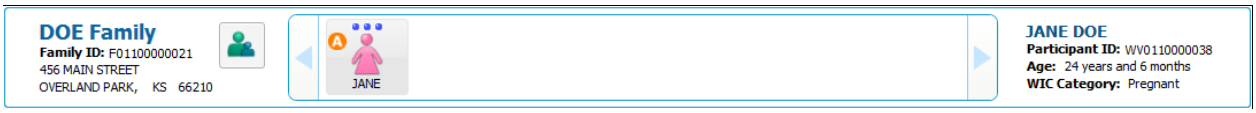
2. Review the **Family Members Issuance** grid, and if necessary, update the Issuance Frequency of the receiving family.



3. Click Issue to issue future-dated benefits.



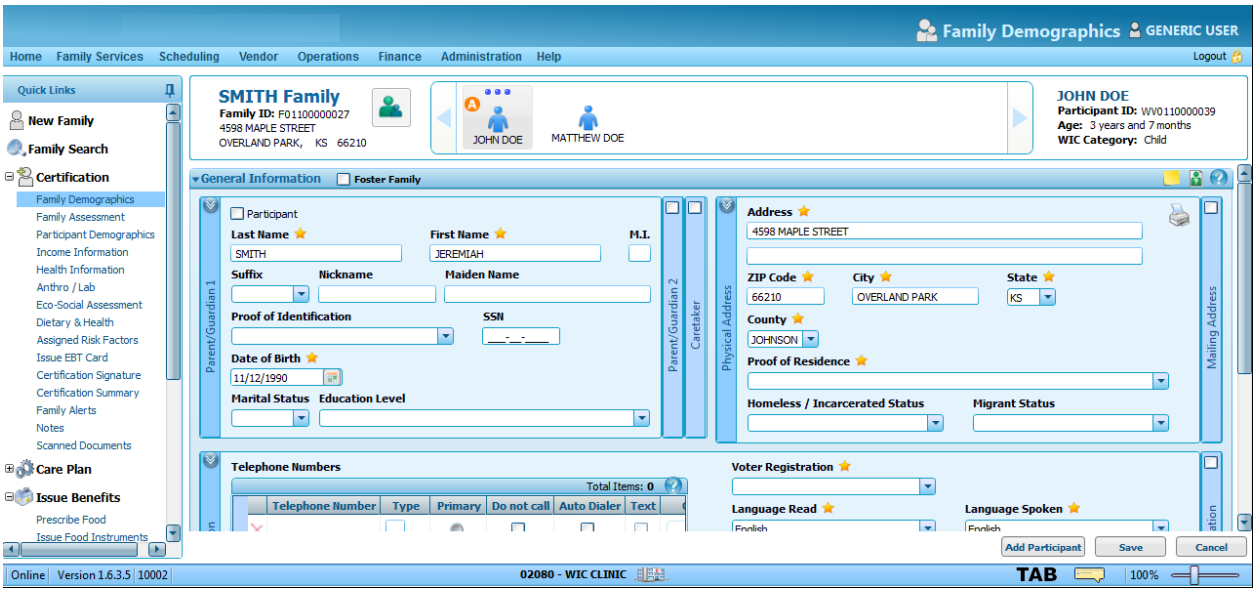
4. Direct the Parent, Guardian, or Caretaker to sign the electronic signature pad and then click **Save**. The future benefits are re-issued and the icons in the **Family Header** are updated.



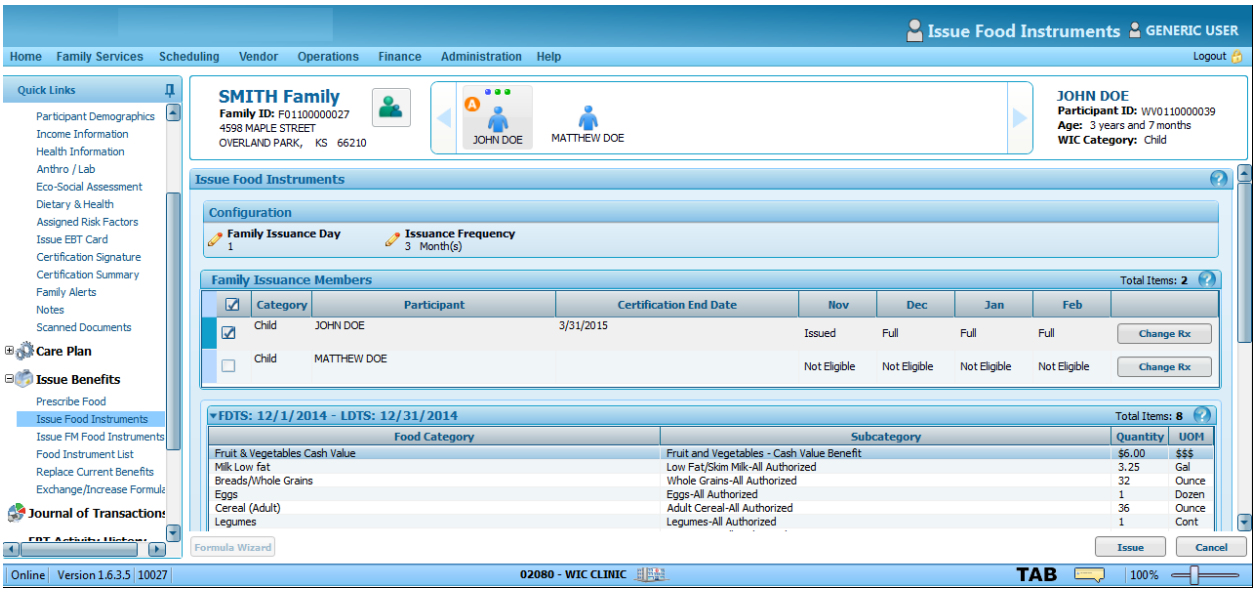
Task F. Re-issuing Future Benefits of the Receiving Family

Complete the following steps to perform this task:

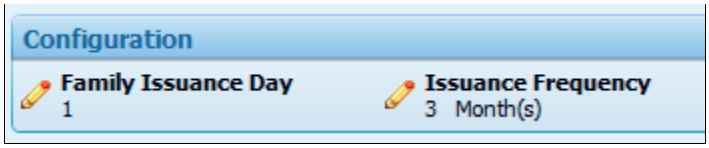
1. Access or open the family record of the receiving family. The **Family Demographics** screen displays.



2. Go to **Family Services →Issue Benefits →Issue Food Instruments**. The **Issue Food Instruments** screen displays.



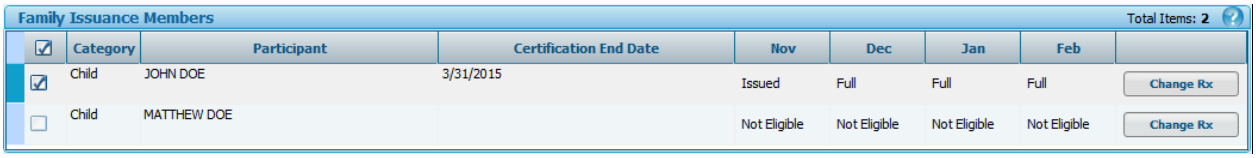
1. View the **Family Issuance Day** (of the receiving family).



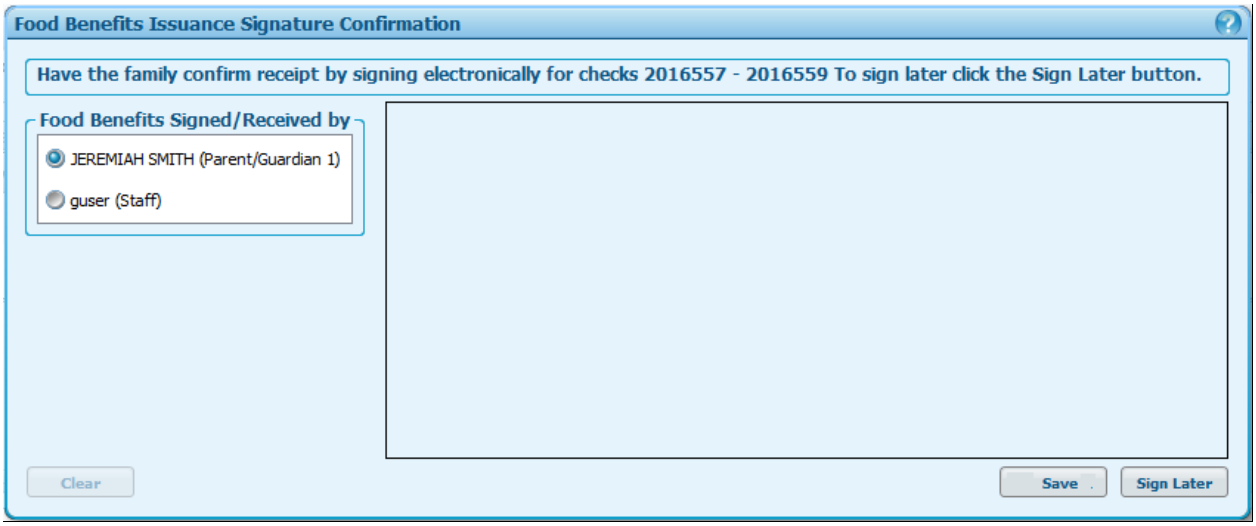
2. If possible, click the **Edit** button ( ) to modify the **Family Issuance Day** of the receiving family to match the **Family Issuance Day** of the original family.

> Again, this is not possible if there are any issued or redeemed benefits for the family with a Last Date to Use greater than the current system date (today's date).

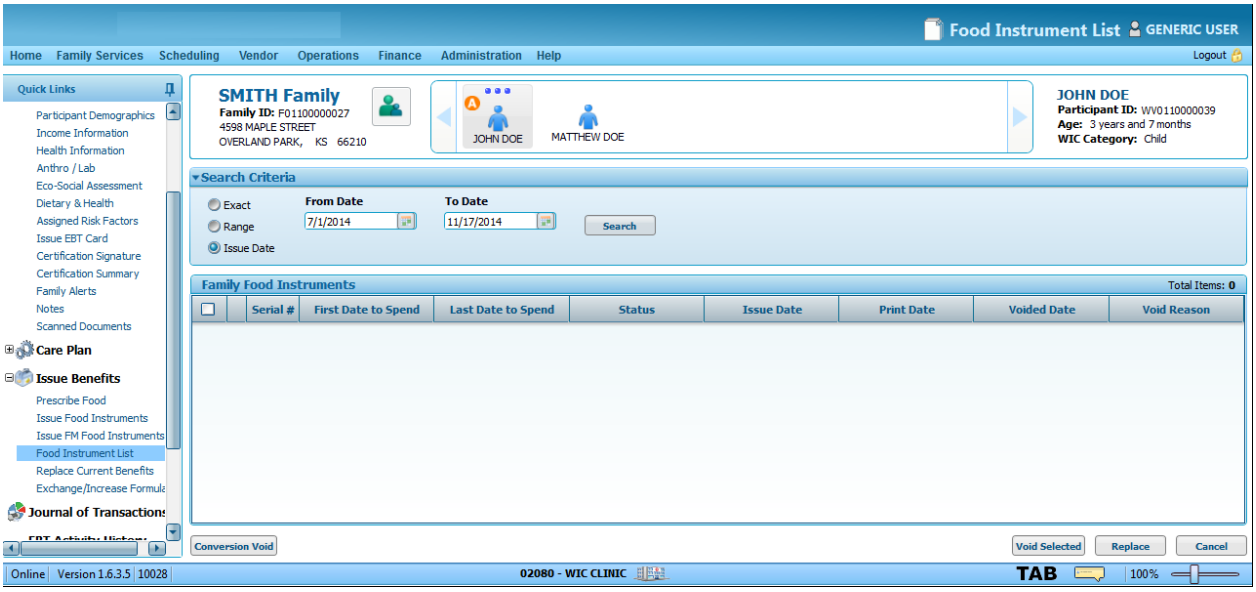
3. Review the **Family Members Issuance** grid, and if necessary, update the Issuance Frequency of the receiving family.



4. Click Issue to issue future-dated benefits.



5. Direct the Parent, Guardian, or Caretaker to sign the electronic signature pad and then click **Save**.



Congratulations!

You have successfully completed the **Between Families: Transferring a Participant Between Two Existing Family Records** process.

Between Families: Transferring a Participant Between Families – Existing to Newly Created Family

This scenario describes the transfer of a participant in state from an existing family record to a newly created family record. Crossroads enforces the concept of only being able to pull families from one clinic to another. The user will need to be logged into the clinic where the participant will be transferred.

This process includes the following task(s):

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

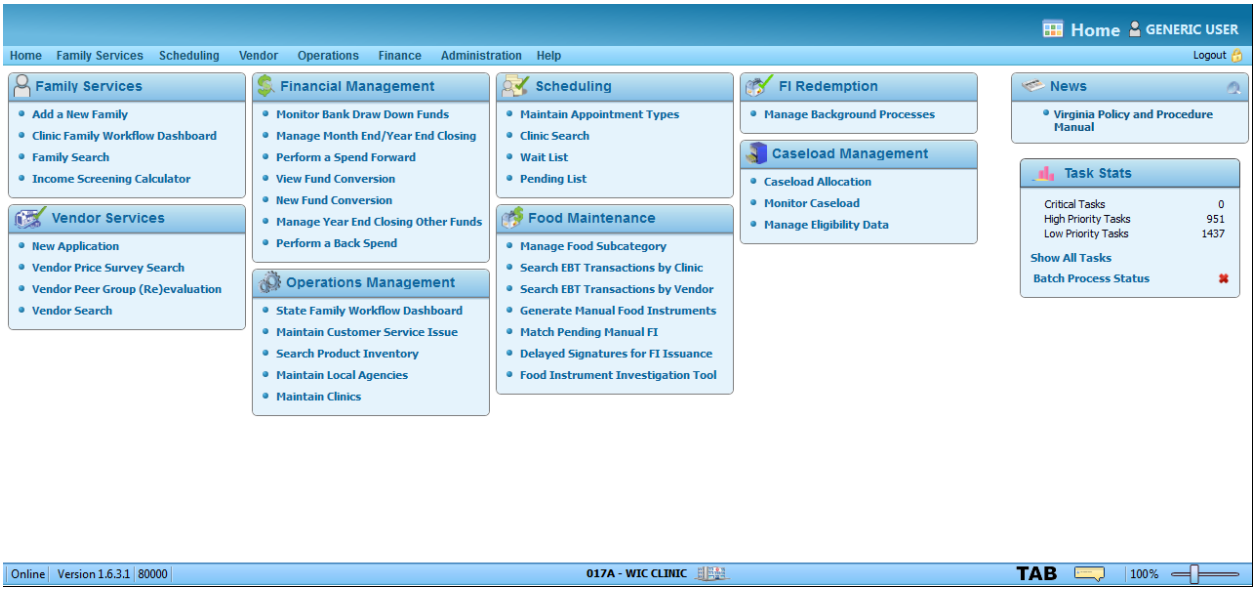
The following tasks will focus on transferring a participant from an existing family to a newly created family.

Task A. Logging into the Clinic where the Participant will be Transferred

This scenario will focus on transferring a participant from existing family to new family.

Complete the following step to perform this task:

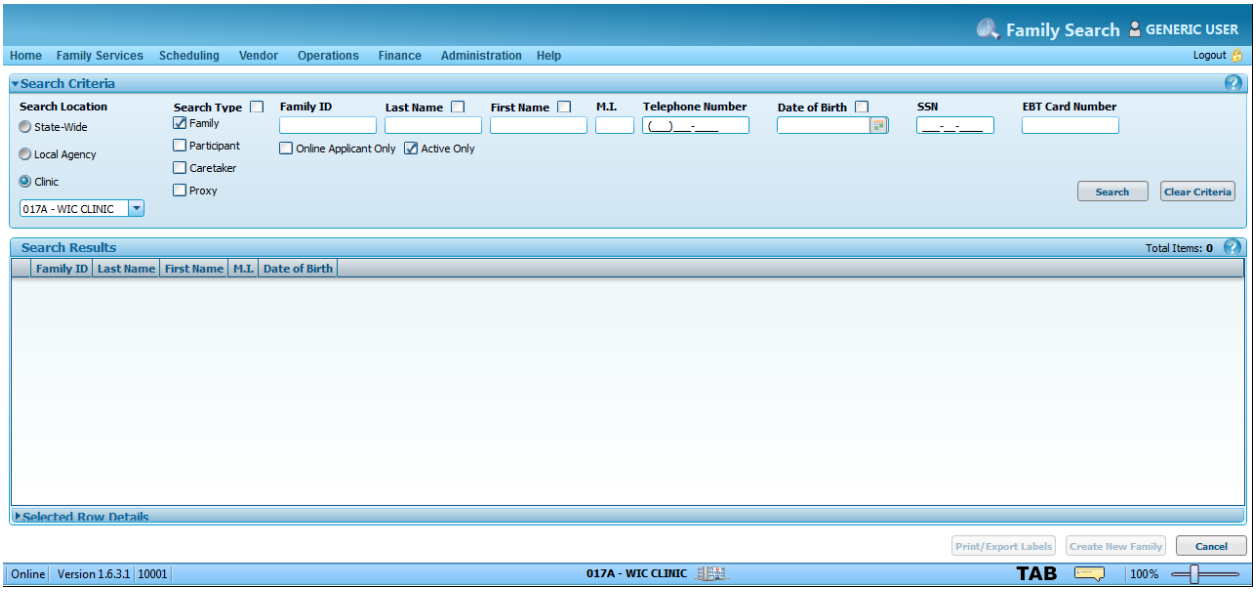
1. Log in to the receiving clinic.



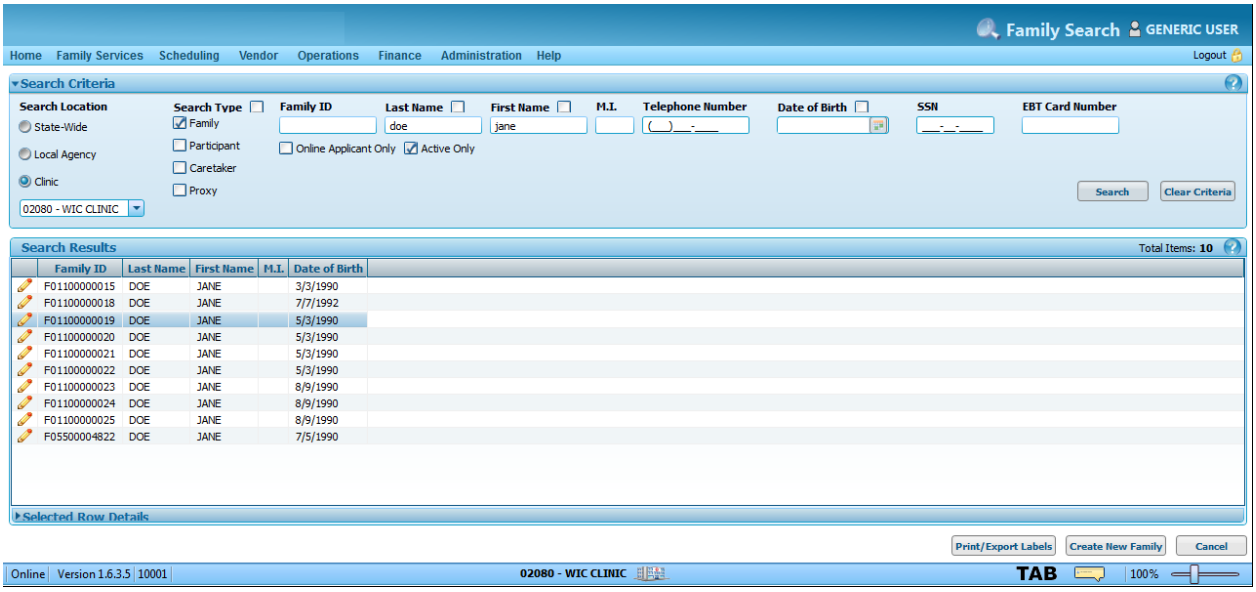
Task B. Using Family Search to Find the Participant to Transfer

Complete the following steps to perform this task:

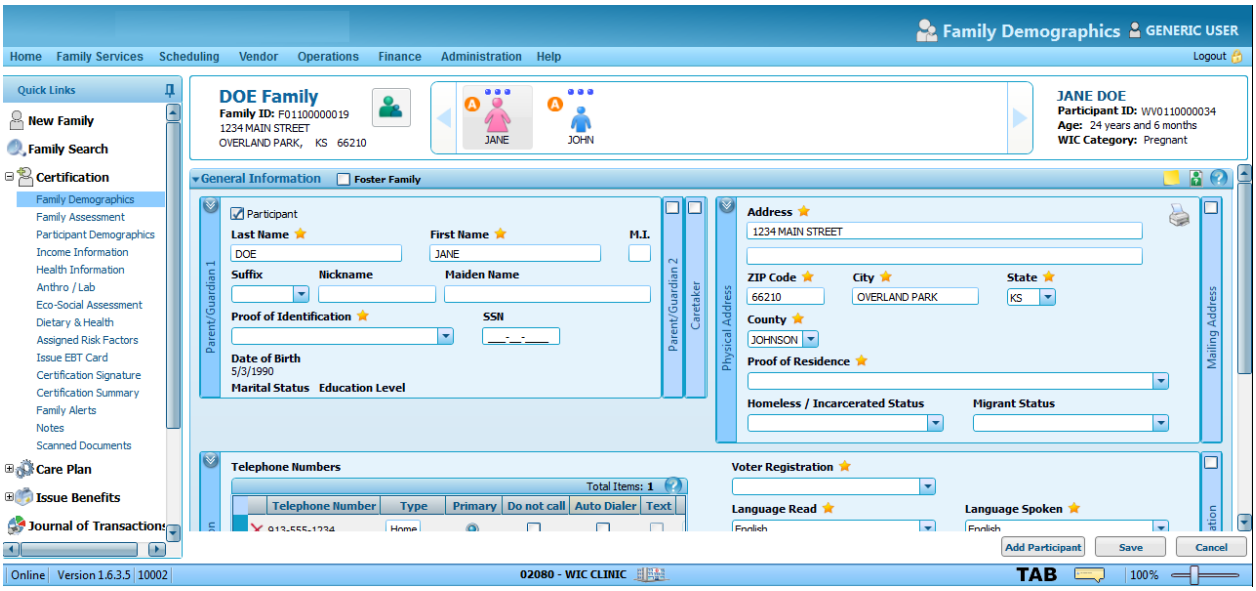
1. Go to **Family Services → Family Search**. The **Family Search** screen displays.



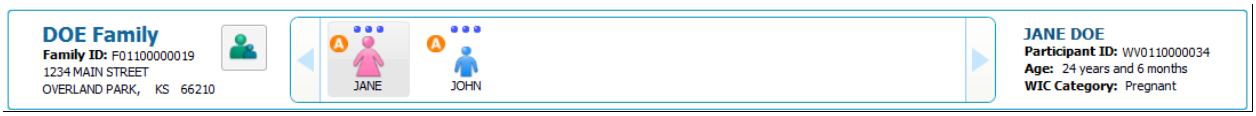
2. Conduct a state-wide search for the participant you want to transfer into your family in your clinic.



3. Click the **Edit** button ( ) to access (or open) the record. The **Family Demographics** screen displays.



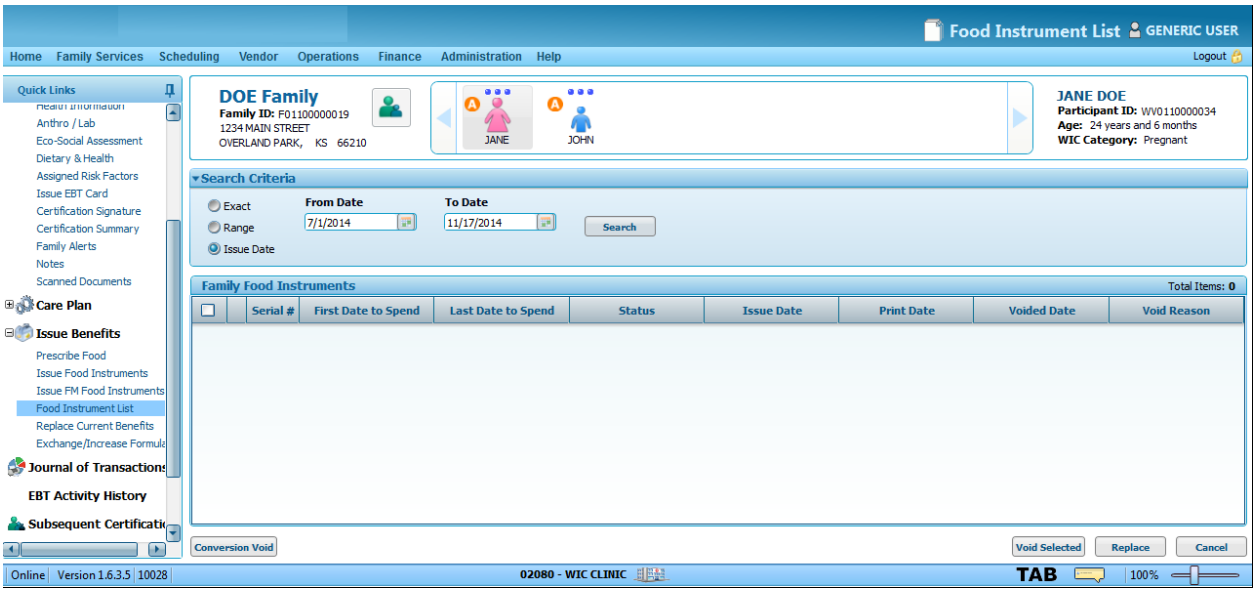
4. Examine the details for the participant and family on the **Family Demographics** screen to confirm you have the correct participant.



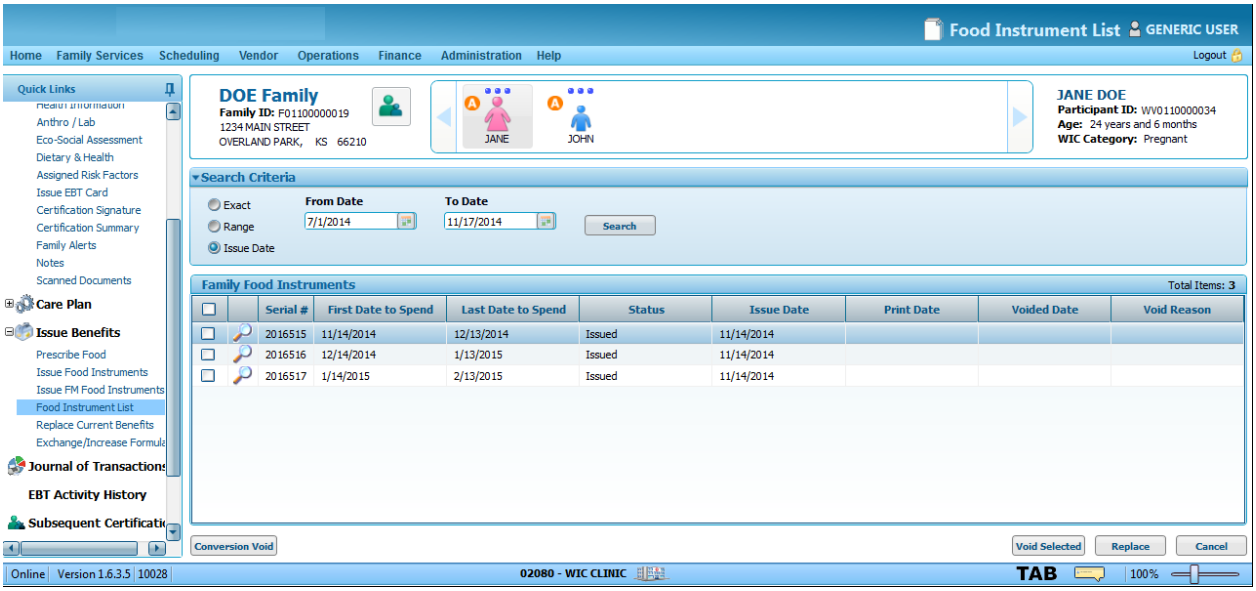
Task C. Voiding Future Benefits Prior to the Transfer

Complete the following steps to perform this task:

1. Go to **Family Services → Issue Benefits → Food Instrument List**. The **Food Instrument List** screen displays.



2. Click **Search**. The screen is refreshed and displays the benefits within the defined search range.



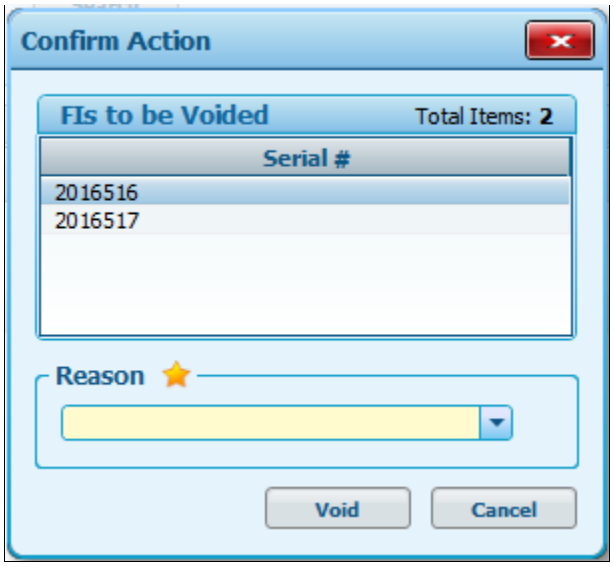
In the example above, both members benefits are aggregated (added together) for each month. The best practice is to void the future month's benefits prior to transferring members and then re-issue the benefits after the transfer has occurred.

3. Within the **Family Food Instruments** grid, select the future month's benefits.

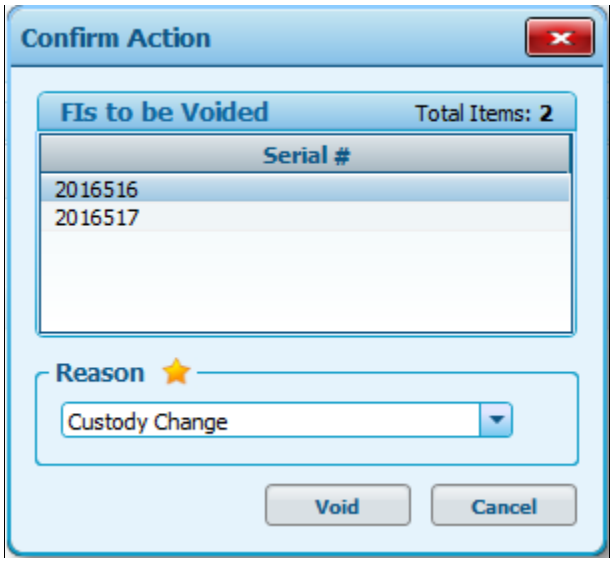
Family Food Instruments

		Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date
☐		2016515	11/14/2014	12/13/2014	Issued	11/14/2014
☑		2016516	12/14/2014	1/13/2015	Issued	11/14/2014
☑		2016517	1/14/2015	2/13/2015	Issued	11/14/2014

4. Click **Void Selected**. The **Confirm Action** screen displays.



5. Select the **Reason** for voiding the benefits.

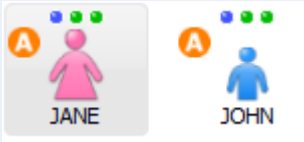


6. Click **Void**. A status message displays indicating success and the **Family Food Instruments** grid is updated.

Family Food Instruments Total Items: 3

		Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
		2016515	11/14/2014	12/13/2014	Issued	11/14/2014			
		2016516	12/14/2014	1/13/2015	Voided	11/14/2014		11/17/2014	Custody Change
		2016517	1/14/2015	2/13/2015	Voided	11/14/2014		11/17/2014	Custody Change

Each member icon is updated within the Family Header and indicates available for future benefit months. (Blue dots indicate issued while green dots indicate availability.)



7. Make note of the **First Date to Spend** date of the current family.

The First Date to Spend date(s) is driven by the Family Issuance Date associated to the family. In this example, notice how each month of benefits begins on the 14th of the month:

11/14/2014

12/14/2014

01/14/2015

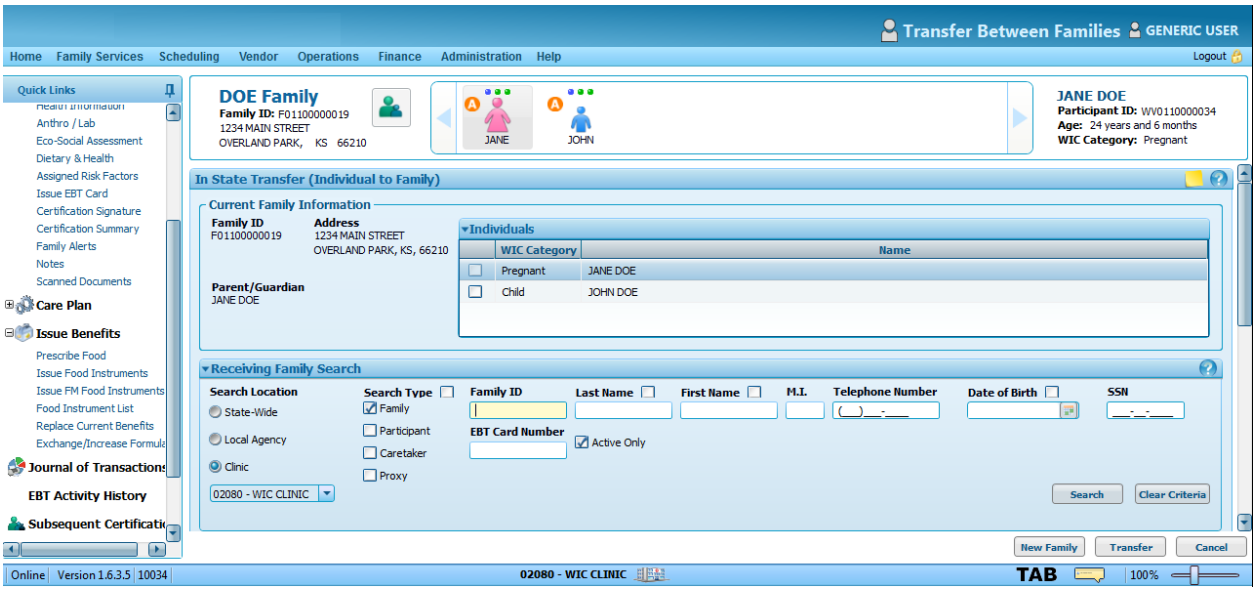
When the selected member(s) are transferred to the new family, it may be necessary to adjust the new family's Family Issuance Date to match the current family's Family Issuance Date to prevent gaps in the benefits.

The Family Issuance Day cannot be changed if there are any issued or redeemed benefits for the family with a Last Date to Use greater than the current system date (today's date).

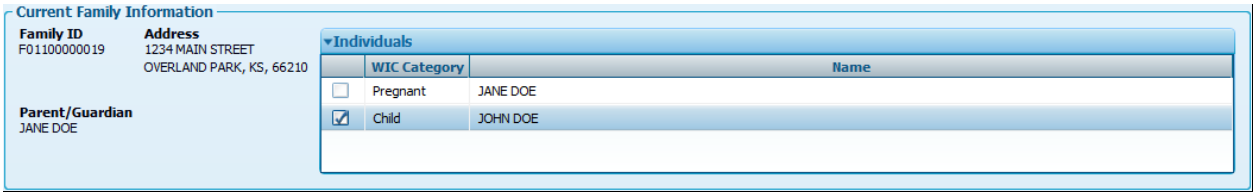
Task D. Transferring Between Families

Complete the following steps to perform this task:

1. Go to **Family Services → Transfer → Between Families**. The **Transfer Between Families** screen displays.



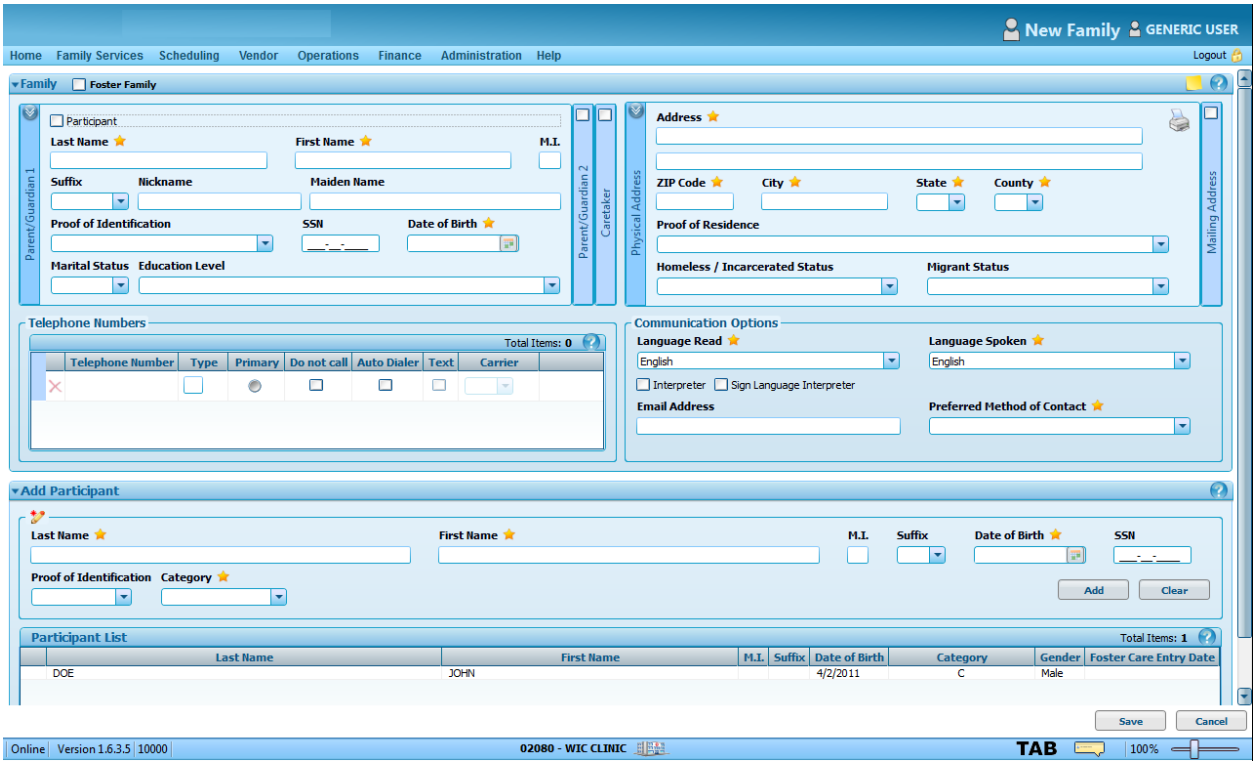
2. In the **Current Family** section, select the participant who will be transferring to a new family.



Task E. Creating a New Family Record

Complete the following steps to perform this task:

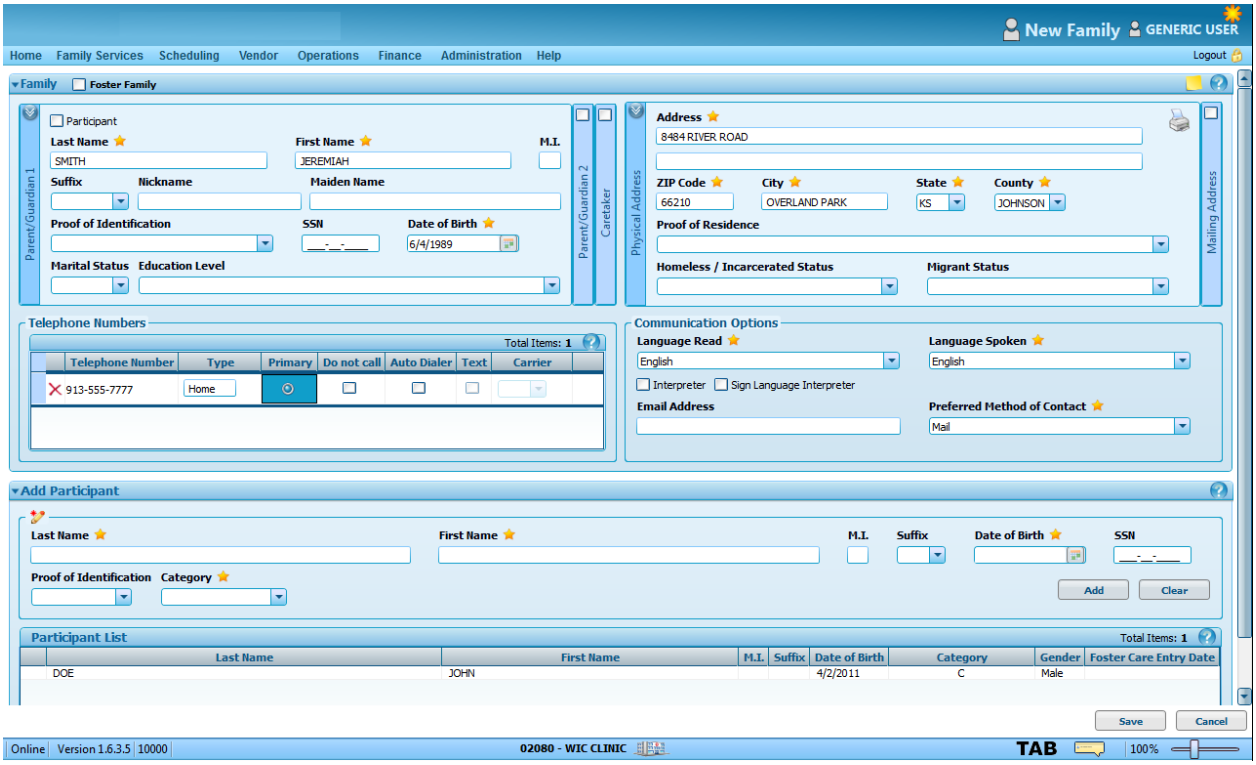
1. Click **New Family**. The **New Family** screen displays.



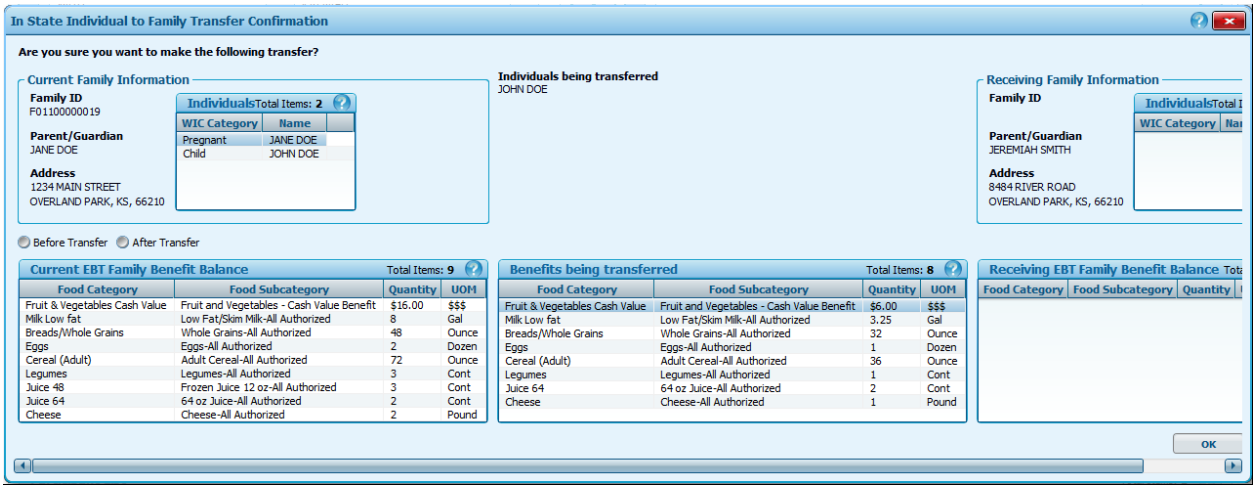
Users have the option of conducting a search and locating an existing record or creating a new record. In this example, a new record is created.

(It may be necessary to scroll to the bottom of the page.) Notice that the participant selected for transfer is listed within the Participant List grid. Therefore, it is not necessary to add the transferring member to this new family as a participant. Simply gather basic demographic information (Parent/Guardian 1, address, phone, etc.) about the new family.

2. Complete the **New Family** screen gathering as much information as possible.



3. Click **Save**. The **In State Individual to Family Transfer Confirmation** screen displays.



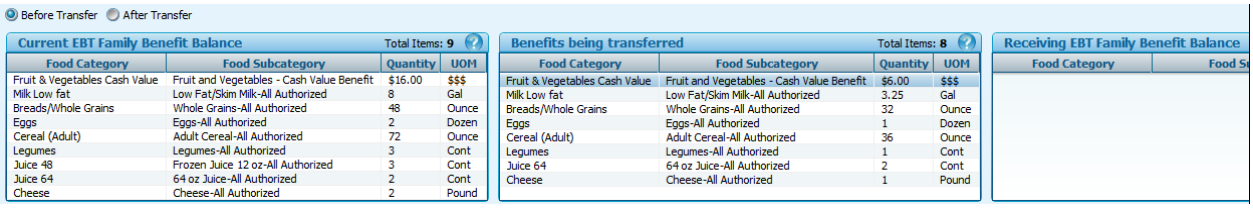
This screen displays only for states configured for EBT issuance. Since benefits are aggregated together, the benefits belonging to the transferring member must be removed from the current family and transferred to the receiving family. For states configured for paper food instrument issuance, member benefits are issued on separate food instruments. Benefits associated to the transferring member are simply transferred without this screen displaying.

The screen displays information about the current family, the receiving family, the individual(s) to

be transferred to the receiving family, and the benefits for each family (current and receiving).

4. Select the **Before Transfer** and **After Transfer** radio buttons to view the movement of benefits prior to the transfer and after the transfer takes place.

- Before Transfer



Before Transfer After Transfer

Current EBT Family Benefit Balance — Total Items: 9

Food Category	Food Subcategory	Quantity	UOM
Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Benefit	$16.00	$$$
Milk Low fat	Low Fat/Skim Milk-All Authorized	8	Gal
Breads/Whole Grains	Whole Grains-All Authorized	48	Ounce
Eggs	Eggs-All Authorized	2	Dozen
Cereal (Adult)	Adult Cereal-All Authorized	72	Ounce
Legumes	Legumes-All Authorized	3	Cont
Juice 48	Frozen Juice 12 oz-All Authorized	3	Cont
Juice 64	64 oz Juice-All Authorized	2	Cont
Cheese	Cheese-All Authorized	2	Pound

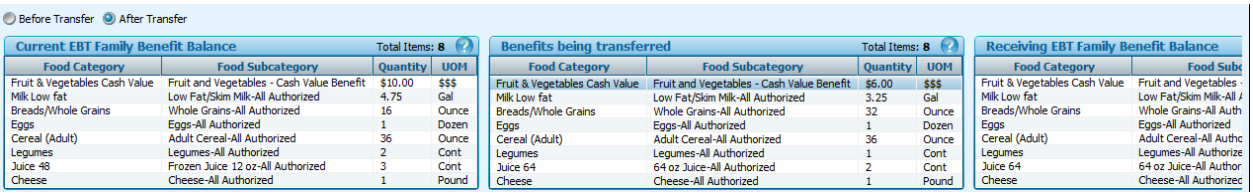
Benefits being transferred — Total Items: 8

Food Category	Food Subcategory	Quantity	UOM
Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Benefit	$6.00	$$$
Milk Low fat	Low Fat/Skim Milk-All Authorized	3.25	Gal
Breads/Whole Grains	Whole Grains-All Authorized	32	Ounce
Eggs	Eggs-All Authorized	1	Dozen
Cereal (Adult)	Adult Cereal-All Authorized	36	Ounce
Legumes	Legumes-All Authorized	1	Cont
Juice 64	64 oz Juice-All Authorized	2	Cont
Cheese	Cheese-All Authorized	1	Pound

Receiving EBT Family Benefit Balance

Food Category	Food Su

- After Transfer



Before Transfer After Transfer

Current EBT Family Benefit Balance — Total Items: 8

Food Category	Food Subcategory	Quantity	UOM
Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Benefit	$10.00	$$$
Milk Low fat	Low Fat/Skim Milk-All Authorized	4.75	Gal
Breads/Whole Grains	Whole Grains-All Authorized	16	Ounce
Eggs	Eggs-All Authorized	1	Dozen
Cereal (Adult)	Adult Cereal-All Authorized	36	Ounce
Legumes	Legumes-All Authorized	2	Cont
Juice 48	Frozen Juice 12 oz-All Authorized	3	Cont
Cheese	Cheese-All Authorized	1	Pound

Benefits being transferred — Total Items: 8

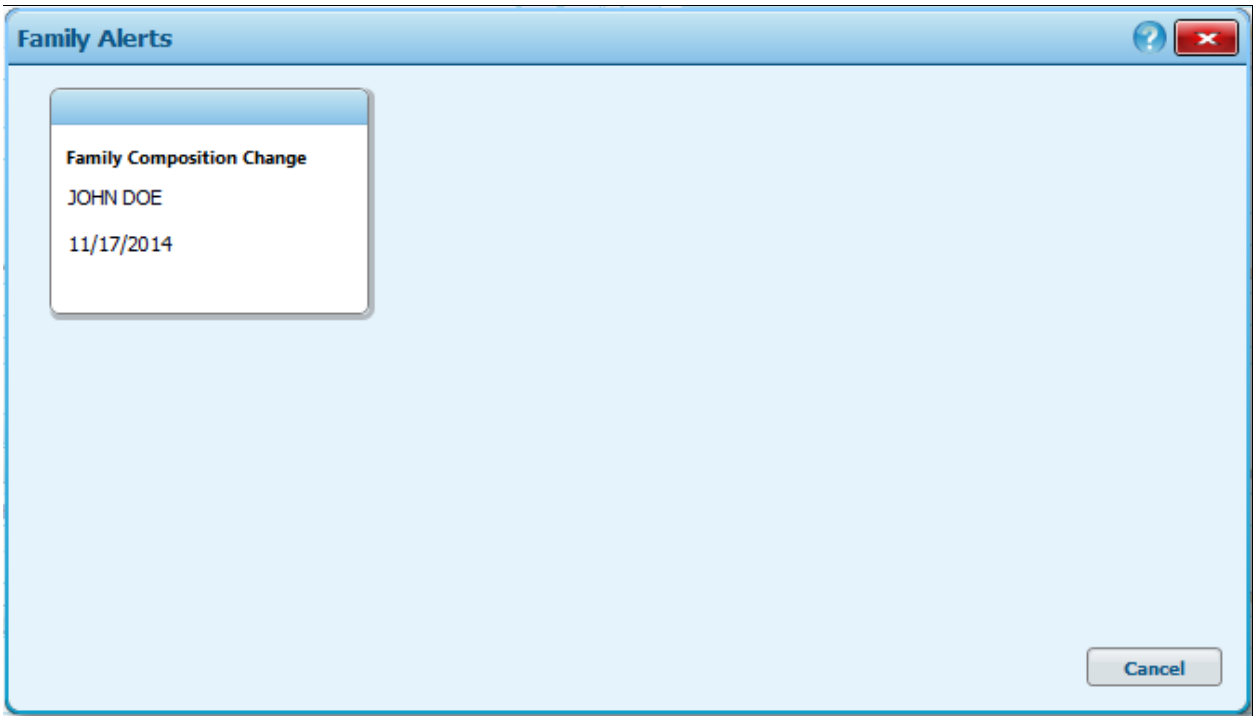
Food Category	Food Subcategory	Quantity	UOM
Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Benefit	$6.00	$$$
Milk Low fat	Low Fat/Skim Milk-All Authorized	3.25	Gal
Breads/Whole Grains	Whole Grains-All Authorized	32	Ounce
Eggs	Eggs-All Authorized	1	Dozen
Cereal (Adult)	Adult Cereal-All Authorized	36	Ounce
Legumes	Legumes-All Authorized	1	Cont
Juice 64	64 oz Juice-All Authorized	2	Cont
Cheese	Cheese-All Authorized	1	Pound

Receiving EBT Family Benefit Balance

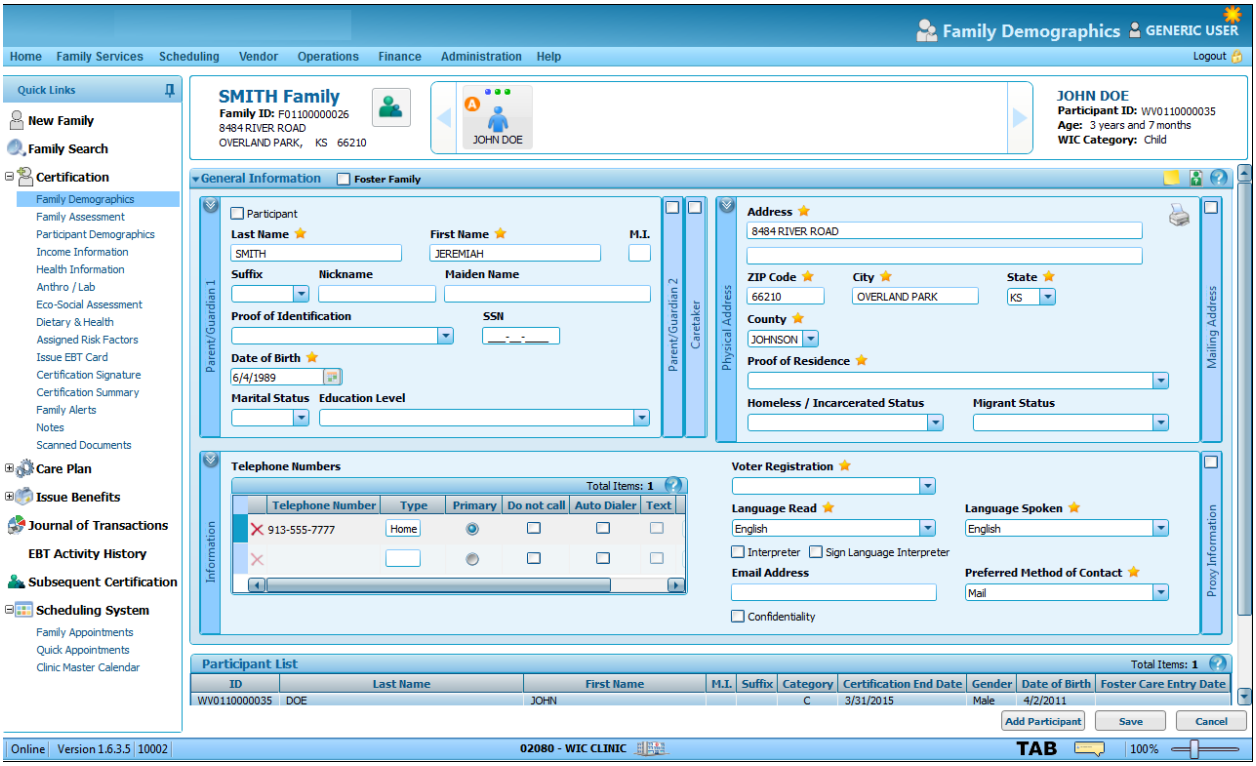
Food Category	Food Subc
Fruit & Vegetables Cash Value	Fruit and Vegetables -
Milk Low fat	Low Fat/Skim Milk-All A
Breads/Whole Grains	Whole Grains-All Auth
Eggs	Eggs-All Authorized
Cereal (Adult)	Adult Cereal-All Autho
Legumes	Legumes-All Authorize
Juice 64	64 oz Juice-All Author
Cheese	Cheese-All Authorized

When Before Transfer is selected, the screen displays benefits within the Current EBT Gamily Benefit Balance and Benefits being transferred grids only. When After Transfer is selected, the screen displays what benefits remain within the current family, the transferring benefits, and the benefits that will be available to the receiving family.

5. Review the information on the screen and click **OK** to complete the transfer. A Family Alerts screen displays indicating there has been a change to the composition of the family.



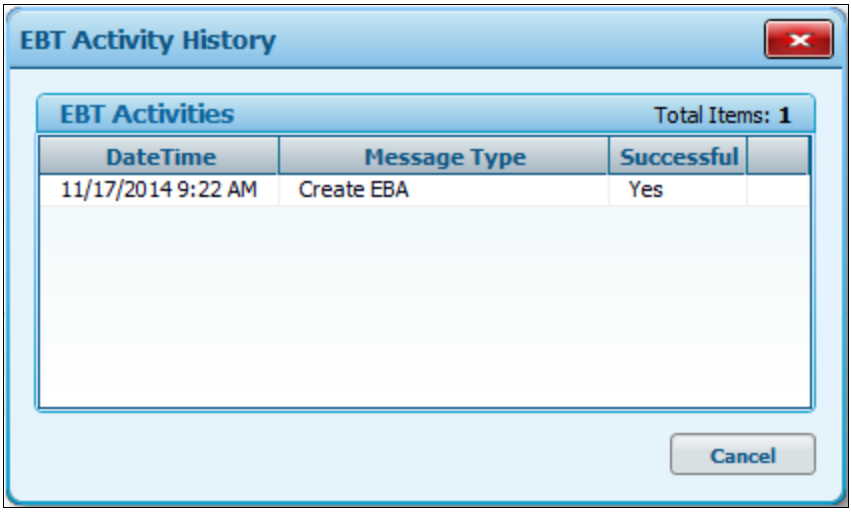
6. Dismiss (or close) the family alert. The **Family Demographics** screen of the newly created family record displays.



The transferred participant retains their original Participant ID, but adopts the Family ID number of the newly created family.

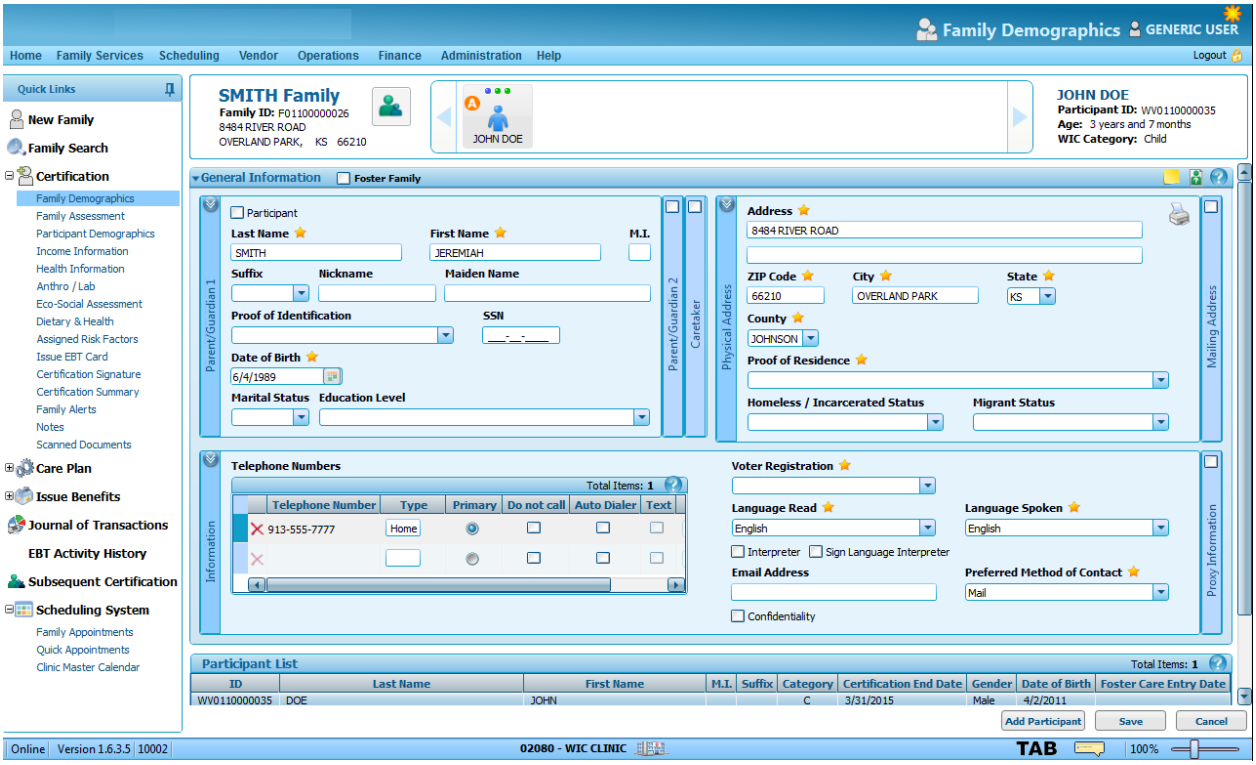
The Journal of Transactions screen displays detail of transfer.

7. Go to **Quick Links → EBT Activity History**. The **EBT Activity History** screen displays.

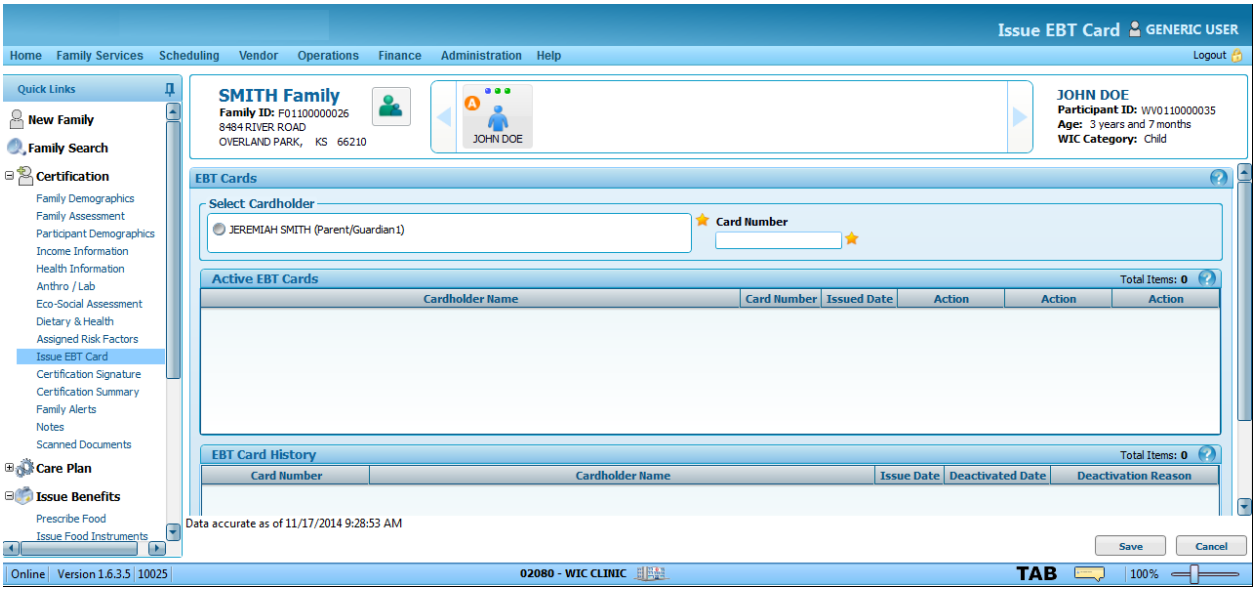


8. Ensure Yes displays under the **Successful** column which indicates the Electronic Benefit Account (EBA) was successfully added to the EBT provider system.

9. Click **Cancel** (twice) to return to the **Family Demographics** screen.



10. Go to **Quick Links → Certification → Issue EBT Card**. The **Issue EBT Card** screen displays.

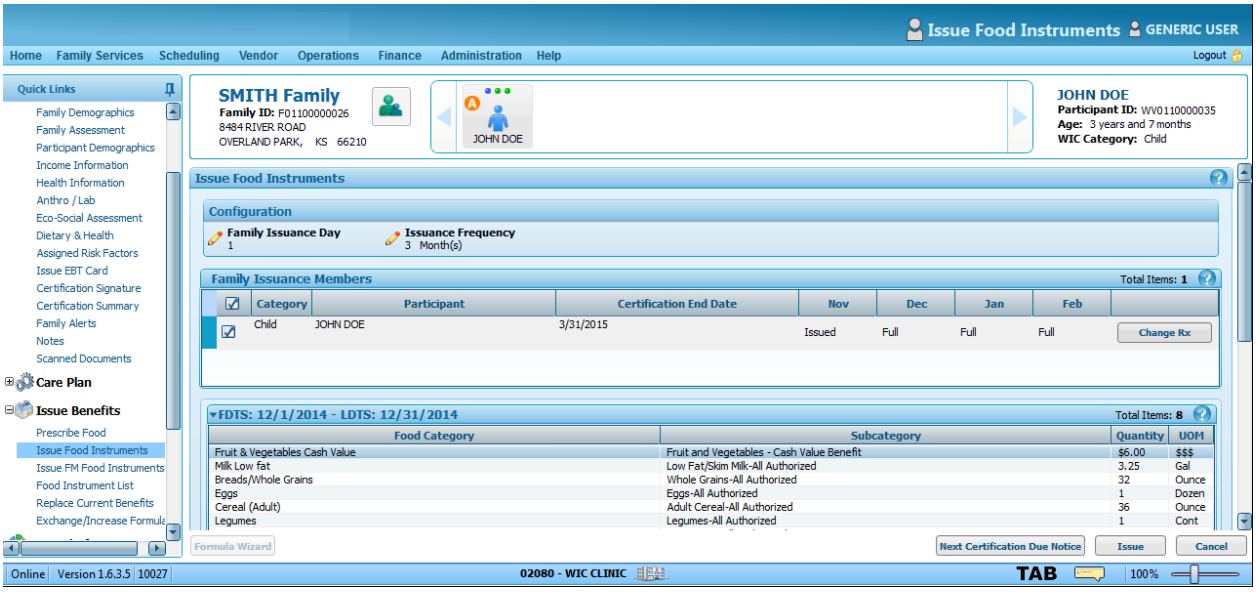


11. Issue a new EBT card for the newly created family and click **Save**.

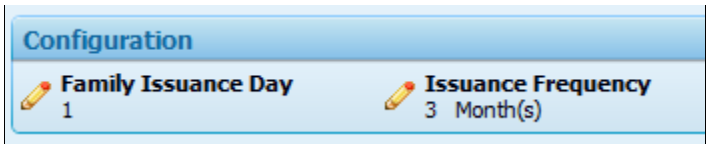
Task F. Re-issuing Future Benefits for the Receiving Family

Complete the following steps to perform this task:

1. Go to **Family Services → Issue Benefits → Issue Food Instruments**. The **Issue Food Instruments** screen displays.



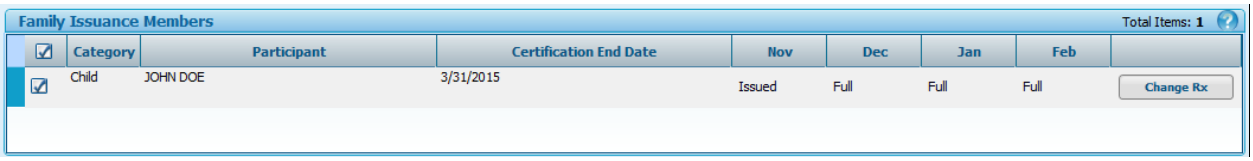
2. View the **Family Issuance Day** (of the new family).



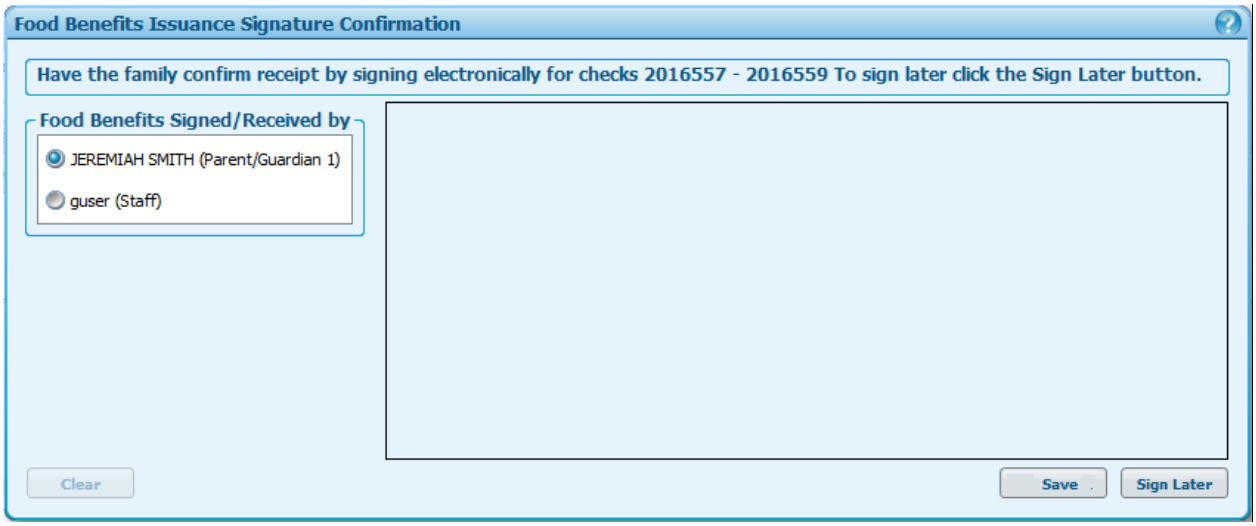
3. If possible, click the **Edit** button ( ) to modify the **Family Issuance Day** of the receiving family to match the **Family Issuance Day** of the original family.

> Again, this is not possible if there are any issued or redeemed benefits for the family with a Last Date to Use greater than the current system date (today's date).

4. Review the **Family Members Issuance** grid, and if necessary, update the Issuance Frequency of the receiving family.



5. Click Issue to issue future-dated benefits.

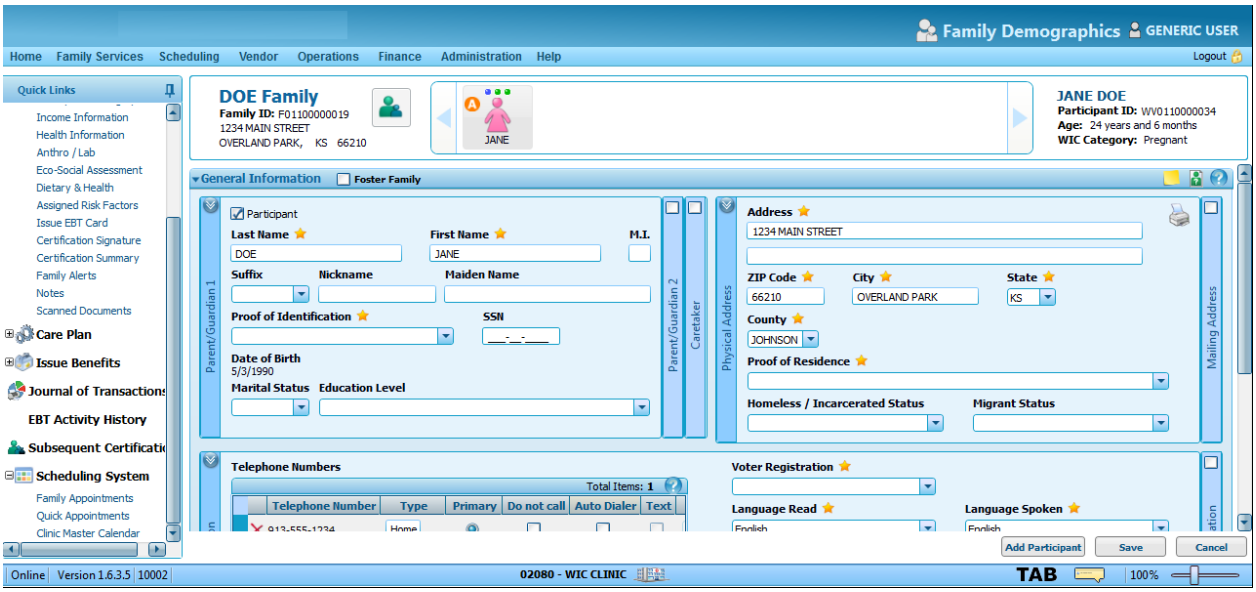


6. Direct the Parent, Guardian, or Caretaker to sign the electronic signature pad and then click **Save**.

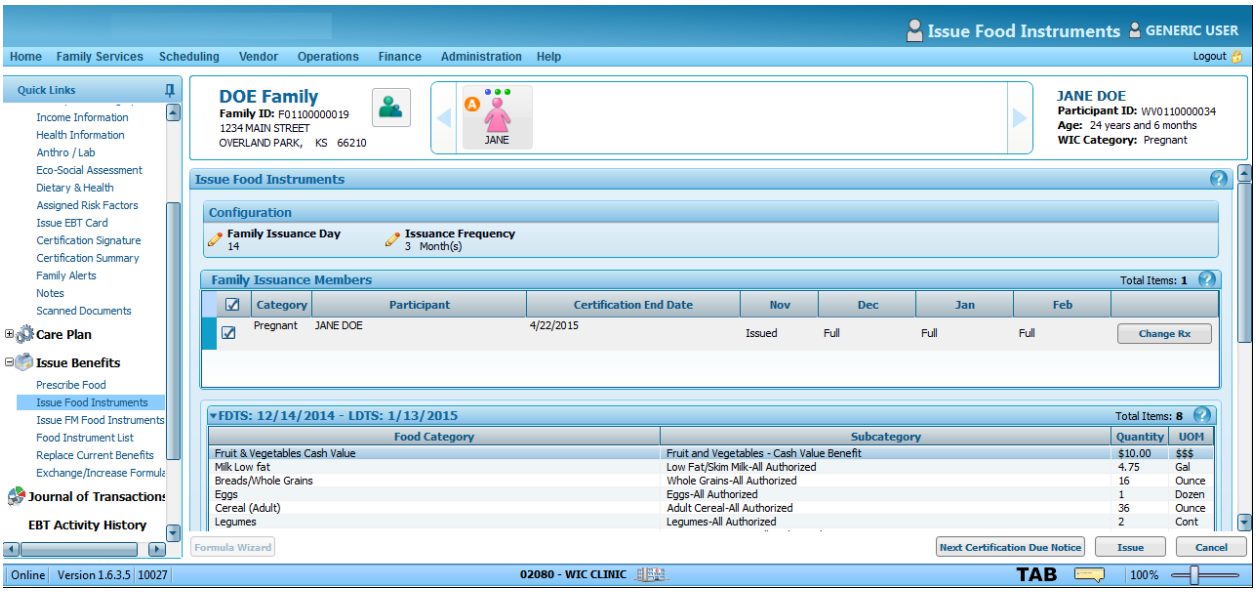
Task H. Re-issuing Future Benefits of the Original Family

Complete the following steps to perform this task:

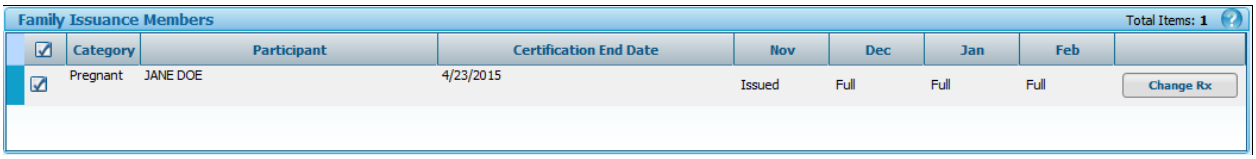
1. Access or open the original family record. The **Family Demographics** screen displays.



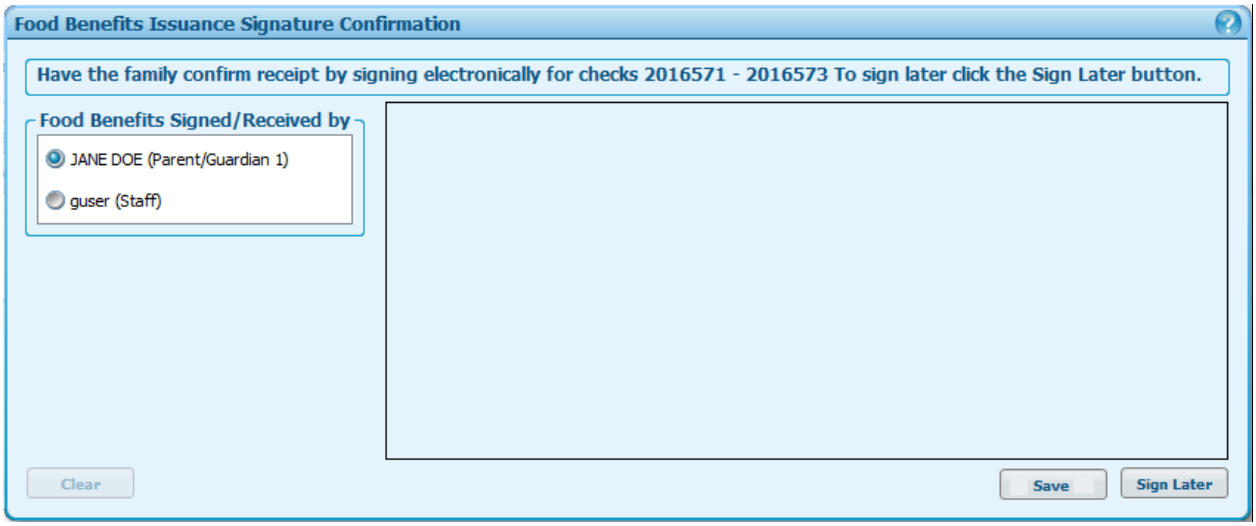
2. Go to **Family Services →Issue Benefits →Issue Food Instruments**. The **Issue Food Instruments** screen displays.



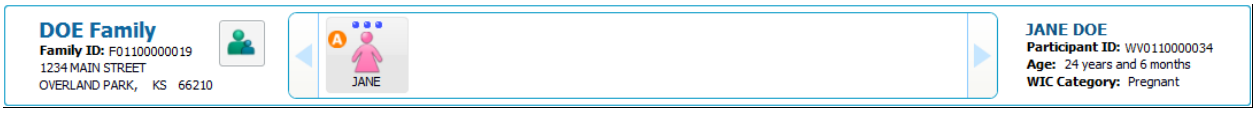
3. Review the **Family Members Issuance** grid, and if necessary, update the Issuance Frequency of the receiving family.



4. Click Issue to issue future-dated benefits.



5. Direct the Parent, Guardian, or Caretaker to sign the electronic signature pad and then click **Save**. The future benefits are re-issued and the icons in the **Family Header** are updated.



Congratulations!

You have successfully completed the **Between Families: Transferring a Participant Between Families – Existing to Newly Created Family** process.

Between Families: Transferring a Foster Infant/Child to Another Foster Family

This scenario explains the process of transferring an infant/child that is in foster care already to another foster family. In this case, the infant/child remains in foster care. (For more detail on how to document that an infant/child has been placed into foster care, consult the scenarios within the Foster Care chapter of this user manual.)

When a user documents that an infant/child is placed into foster care, the system automatically creates an Electronic Benefit Account (EBA) on the EBT provider site for the infant/child. Any benefits issued to the foster infant/child are placed into this EBA. When completing a transfer where the infant/child is within foster care already, there is no need to void the infant/child's benefits prior to the transfer. Simply complete the transfer. The infant/child's benefits remain in the same account that was originally created for the infant/child. Although, since it is unlikely that the new foster family will be given the infant/child's EBT card, it may be necessary to issue a new EBT card.

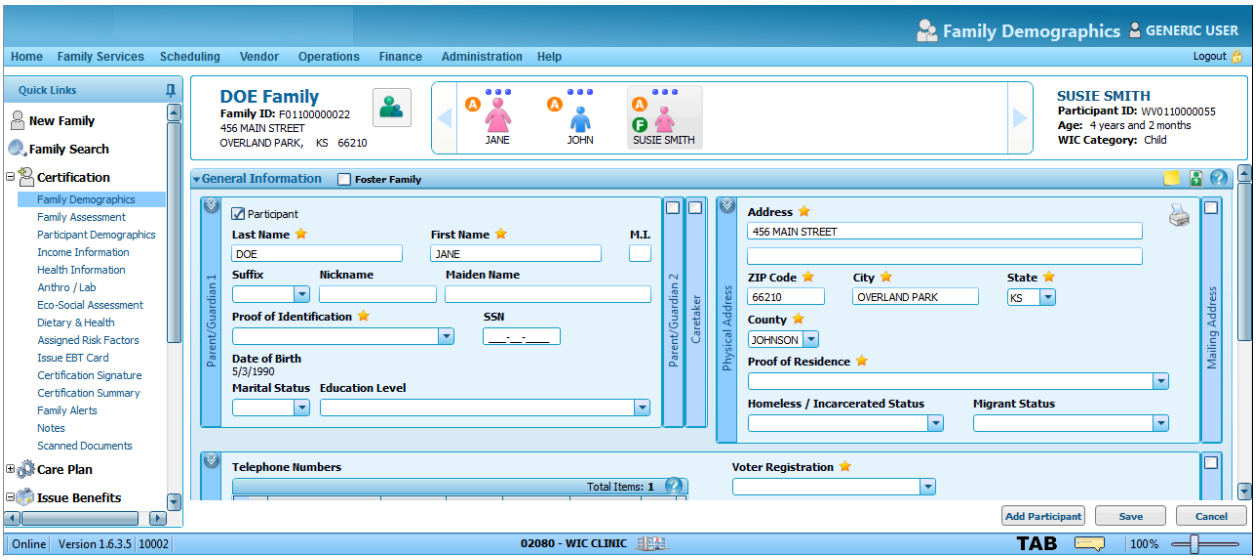
This process includes the following task(s):

Task A. Completing the Transfer **10-43**

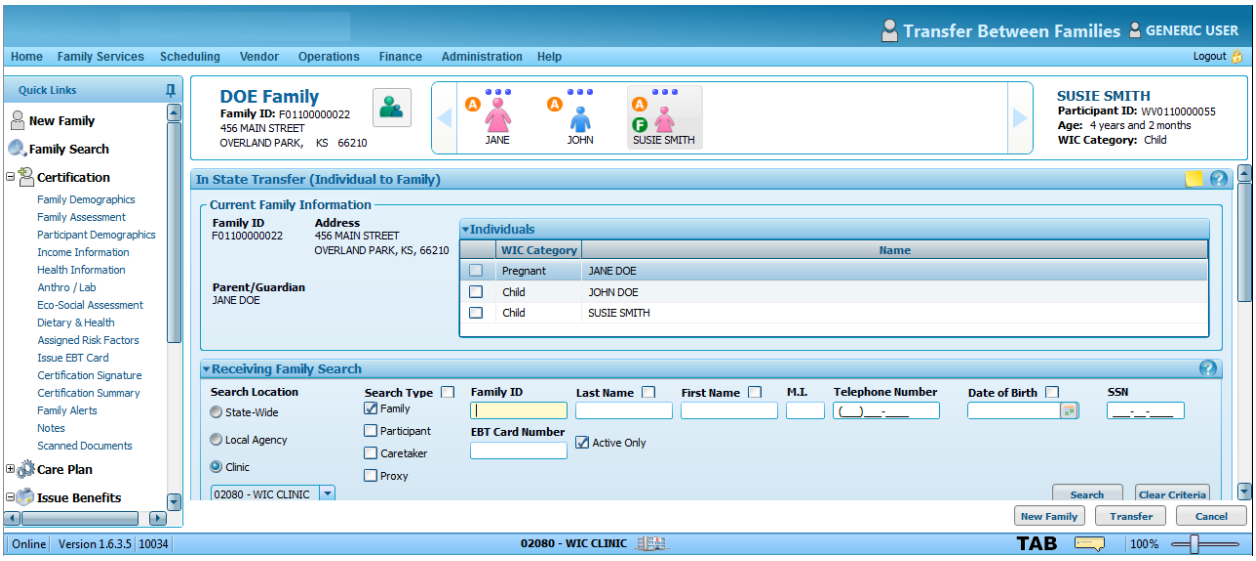
Task A. Completing the Transfer

Complete the following steps to perform this task:

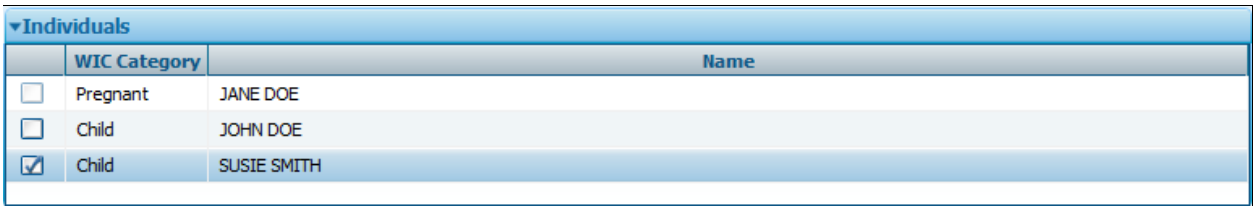
1. Access (or open) the desired family record. The Family Demographics screen displays.



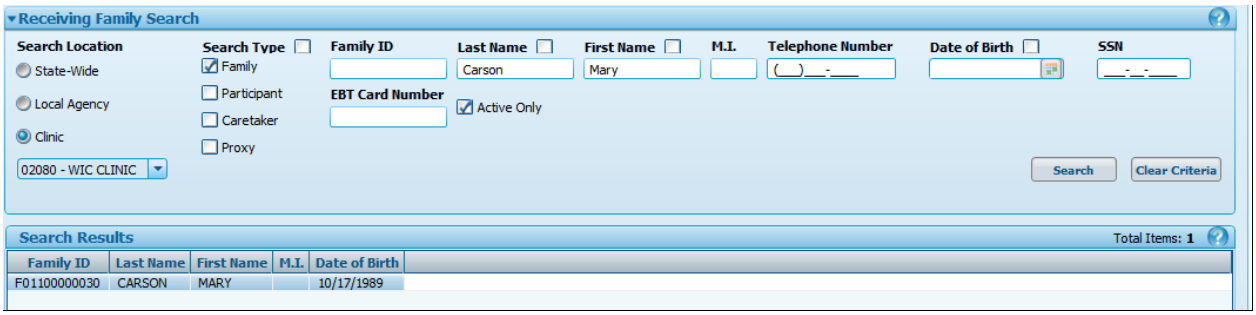
2. Go to **Family Services → Transfer → Between Families**. The **Transfer Between Families** screen displays.



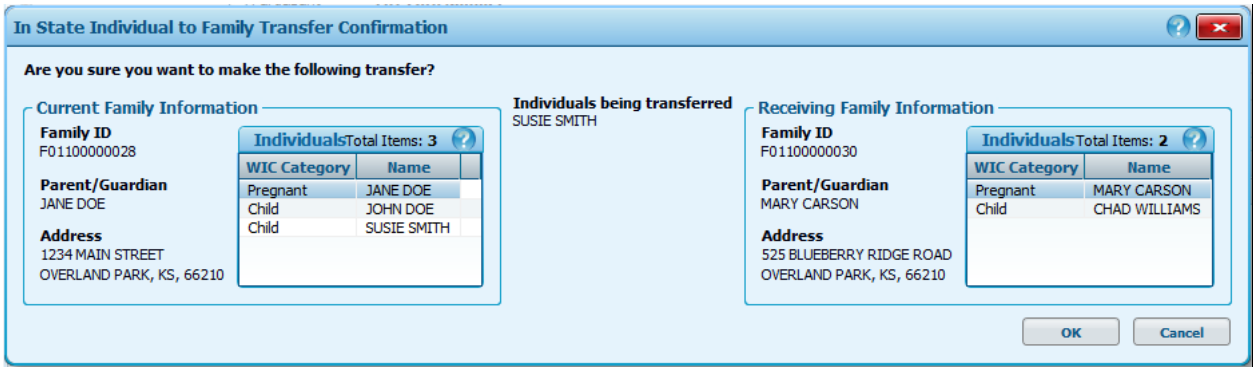
3. Within the **Individuals** container, select the foster infant/child that is transferring to another foster family.



4. Under **Receiving Family Search**, enter search criteria to find the other foster family and then click **Search**. The results are displayed within the **Search Results** grid.

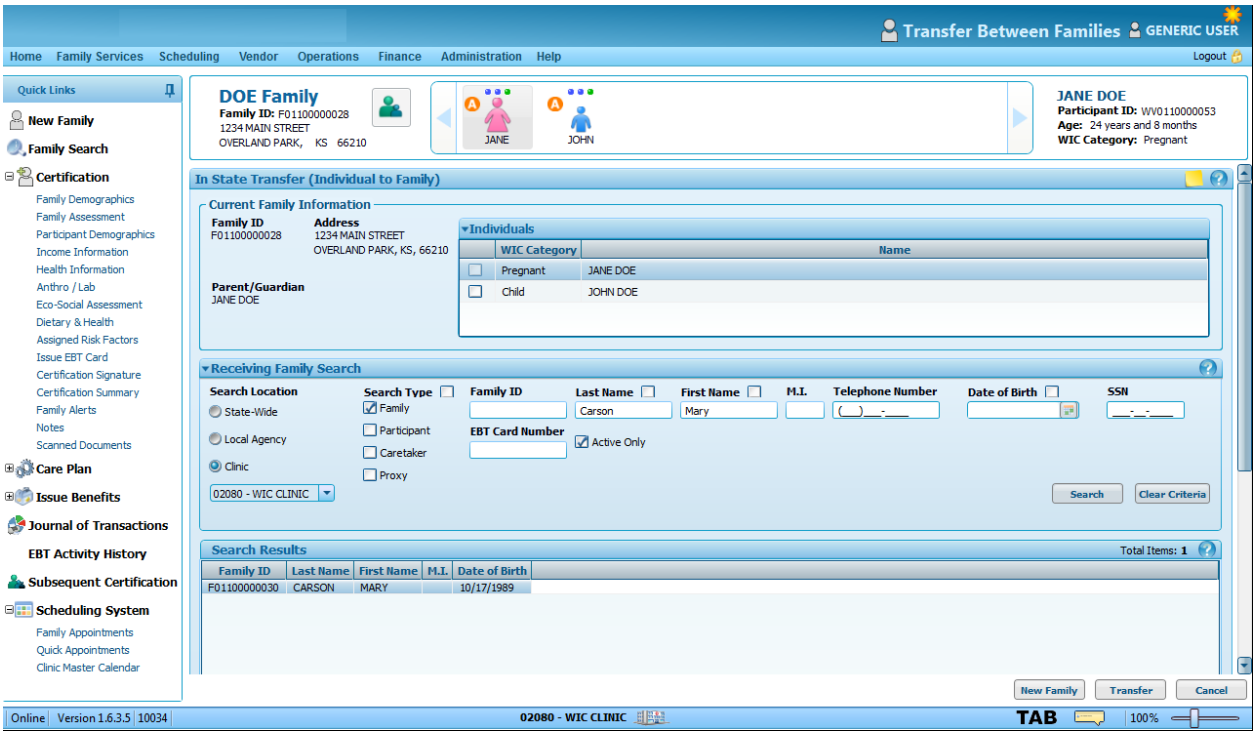


5. Click **Transfer**. The **In State Individual to Family Transfer Confirmation** screen displays.

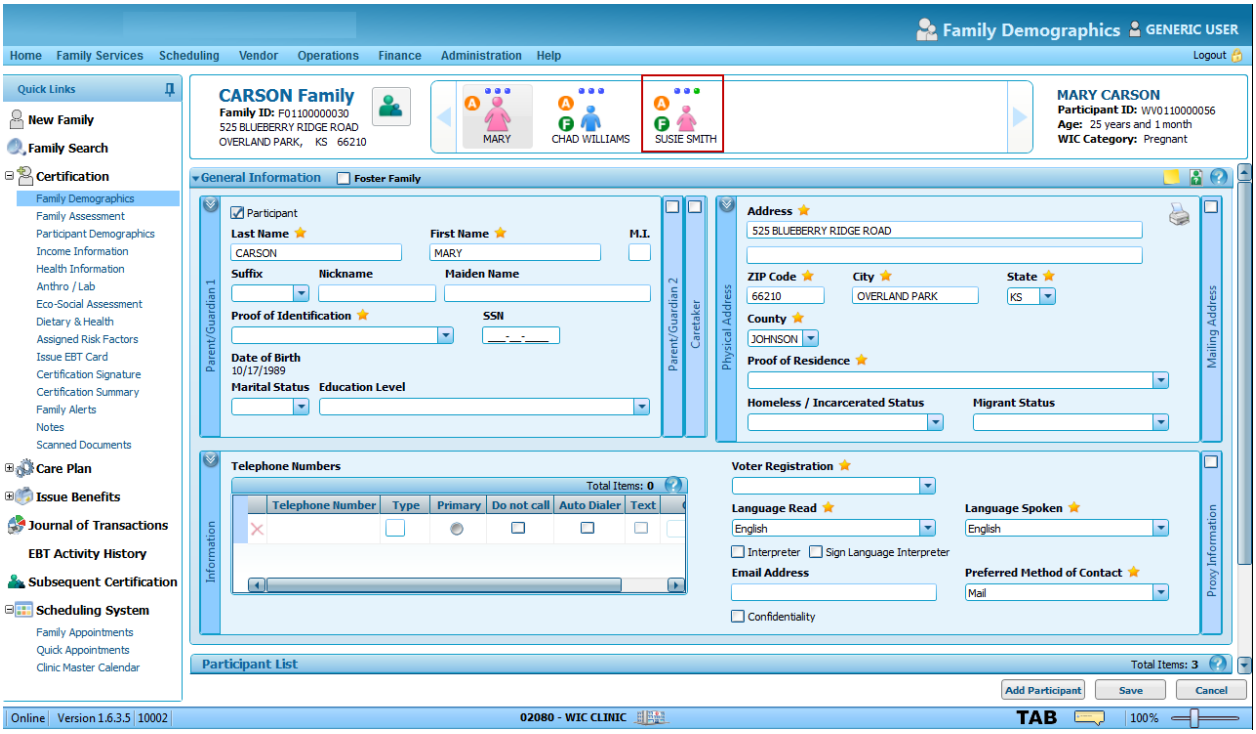


6. Review the information on the screen to ensure the correct family has been selected and then click **OK** to complete the transfer. The foster infant/child is removed from the original foster family and now is associated to the new foster family.

- Original foster family



- New foster family



Congratulations!

You have successfully completed the **Between Families**: Transferring a Foster Infant/Child to Another Foster Family process.

Between Families: Transferring a Foster Infant/Child to a Non-Foster Family

This scenario explains the process of transferring an infant/child that is currently in foster care to another foster family and then indicating that he/she is no longer in foster care. For example, maybe the child was removed from its biological family, placed into foster care, and now is being returning to its biological family. (For more detail on how to document that an infant/child has been placed into foster care, consult the scenarios within the Foster Care chapter of this user manual.)

When a user documents that an infant/child is placed into foster care, the system automatically creates an Electronic Benefit Account (EBA) on the EBT provider site for the infant/child. Any benefits issued to the foster infant/child are placed into this EBA. When completing a transfer where the infant/child is within foster care already, there is no need to void the infant/child's benefits prior to the transfer. Simply complete the transfer. The infant/child's benefits remain in the same account that was originally created for the infant/child. The biological family can redeemed whatever benefits remain for the infant/child. Although, it may be necessary to issue a new EBT card if the foster family did not return the infant/child's EBT card.

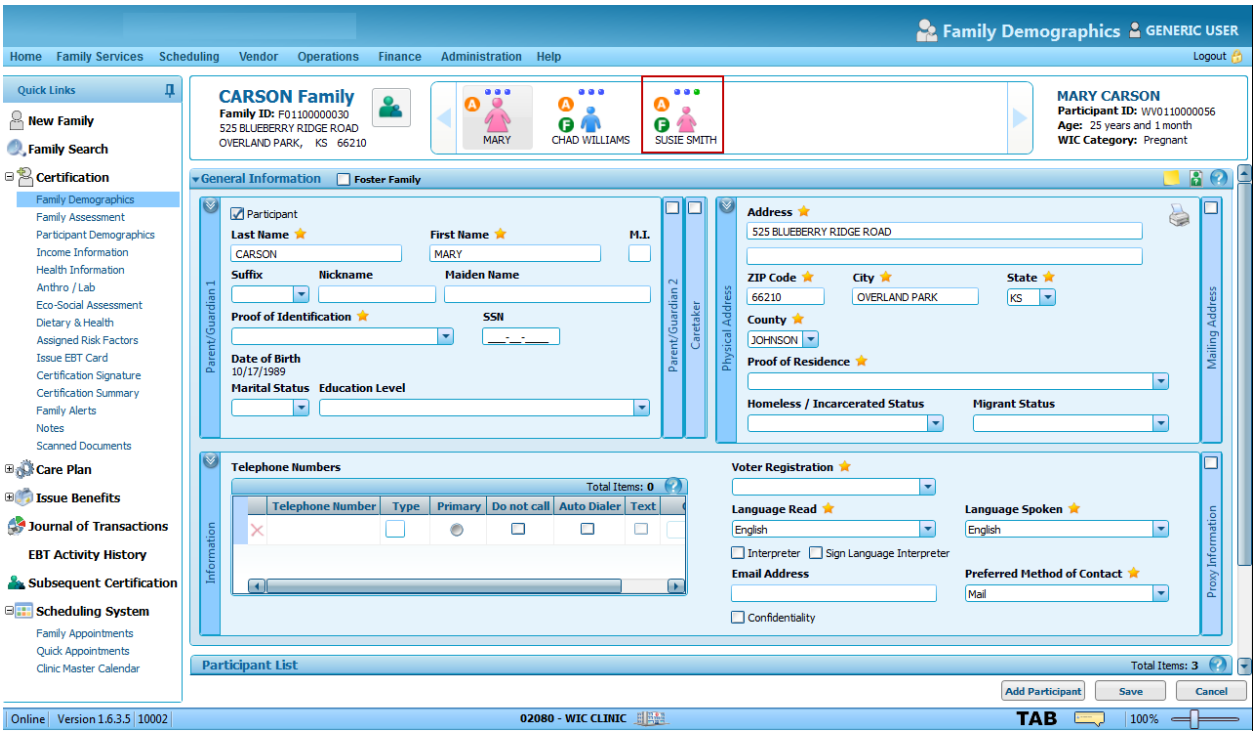
This process includes the following task(s):

Task A. Completing the Transfer **10-48**

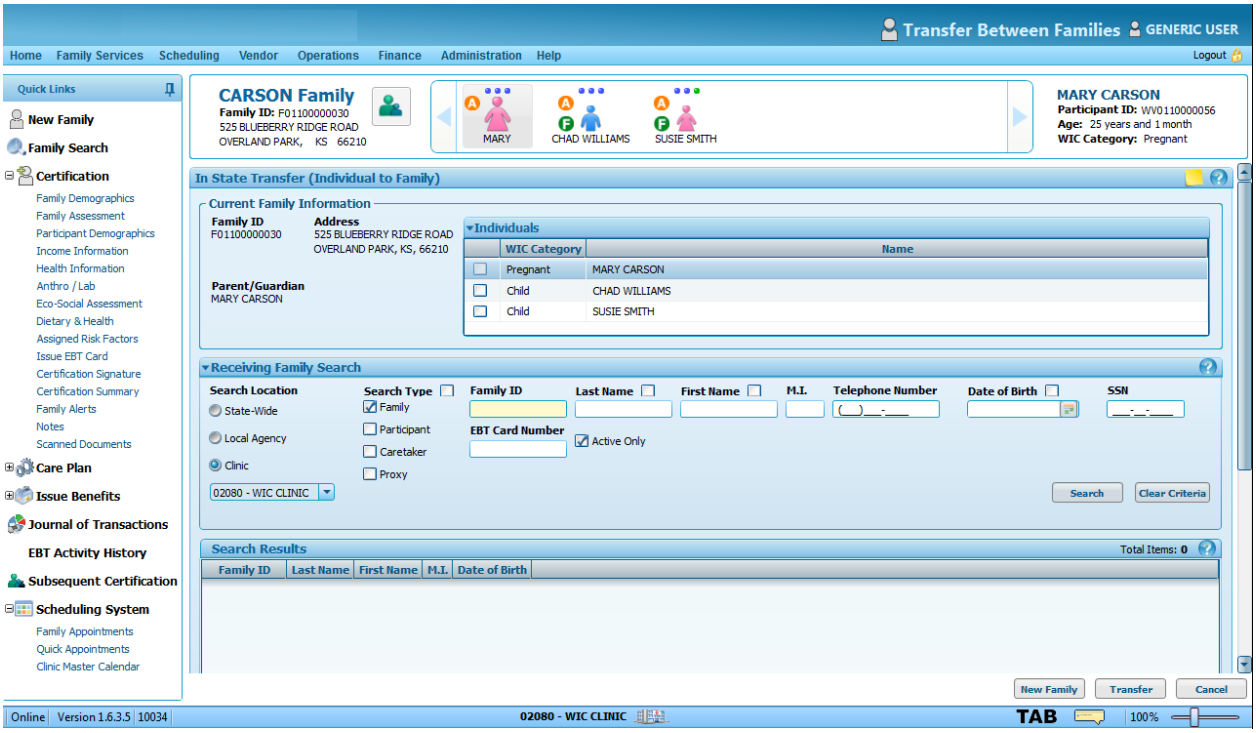
Task A. Completing the Transfer

Complete the following steps to perform this task:

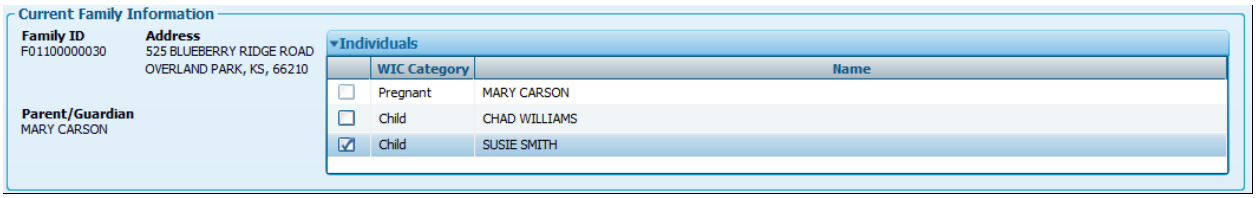
1. Access (or open) the desired family record. The Family Demographics screen displays.



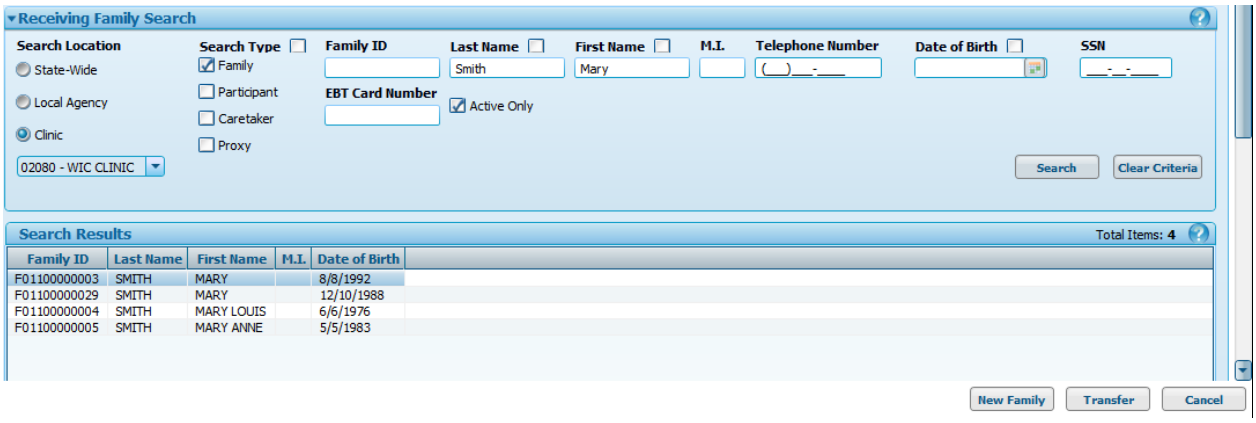
2. Go to **Family Services → Transfer → Between Families**. The **Transfer Between Families** screen displays.



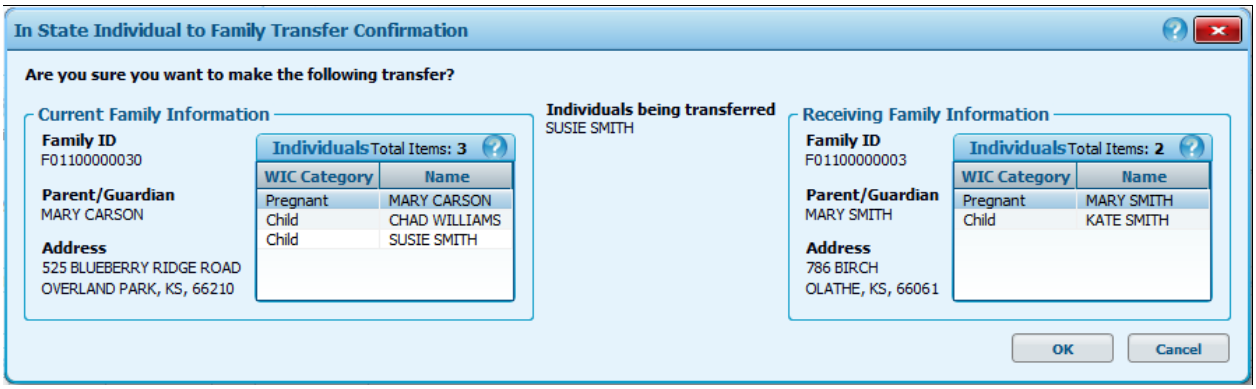
3. Within the **Individuals** container, select the foster infant/child that is transferring to a non-foster family.



4. Under **Receiving Family Search**, enter search criteria to find the other foster family and then click **Search**. The results are displayed within the **Search Results** grid.

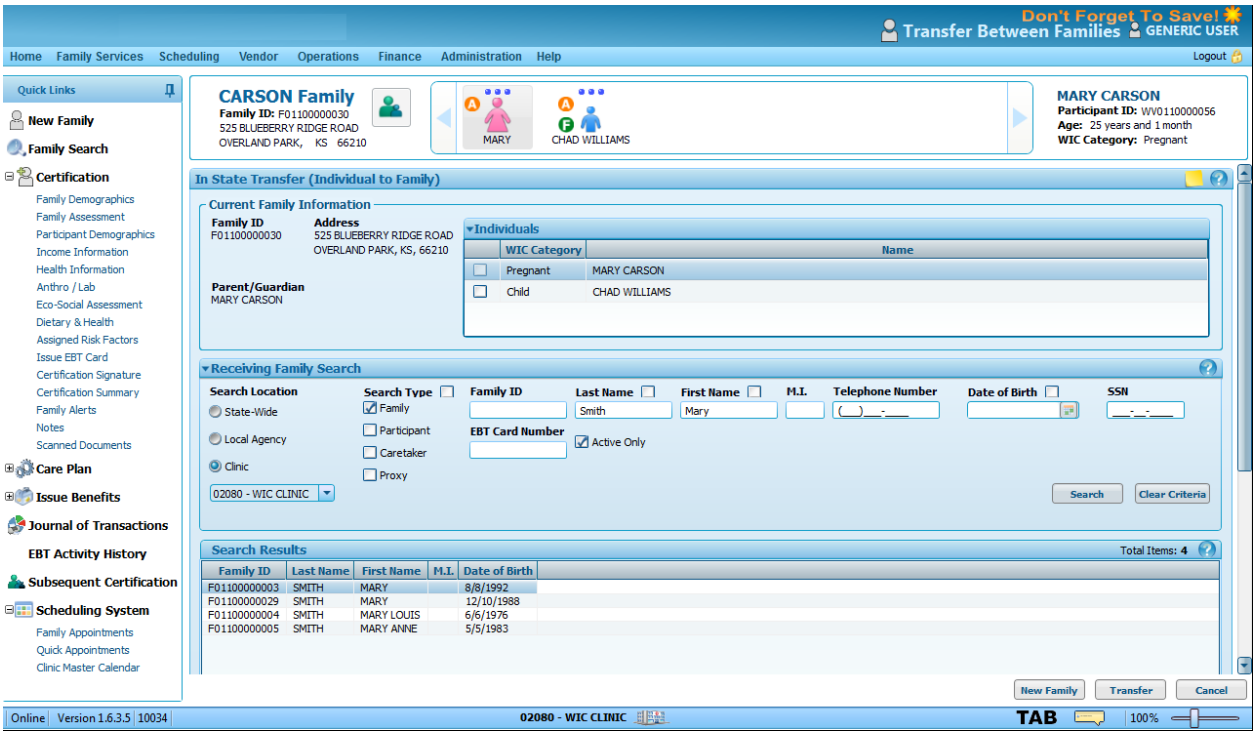


5. Select the desired non-foster family and then click **Transfer**. The **In State Individual to Family Transfer Confirmation** screen displays.

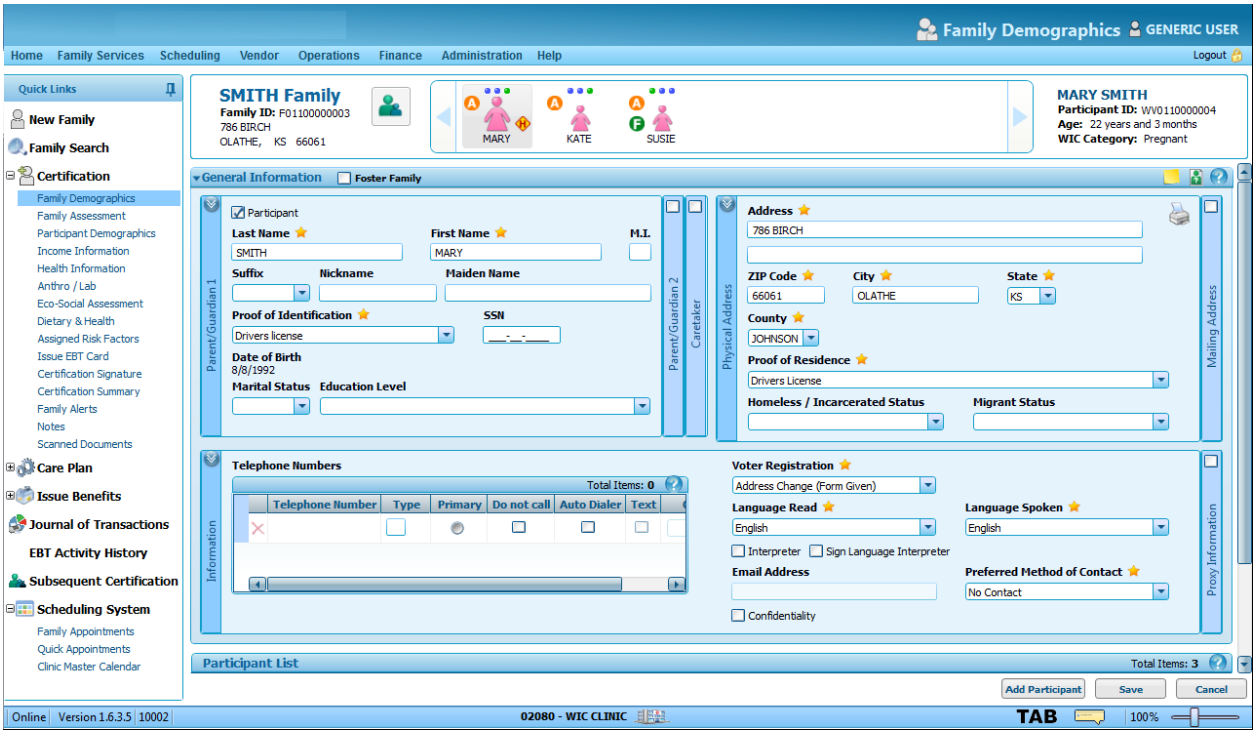


6. Review the information on the screen to ensure the correct family has been selected and then click **OK** to complete the transfer. The foster infant/child is removed from the original foster family and now is associated to the new foster family.

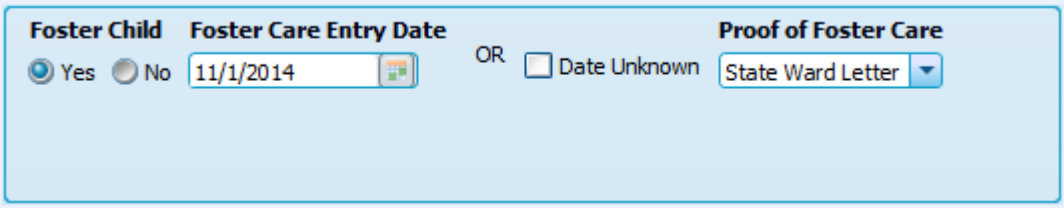
- Original foster family



- Non-foster family



The non-foster family (which may be the biological family) can redeem any benefits still associated to the Electronic Benefit Account (EBA) of the infant/child. Once benefits have been redeemed or expire, the user can indicate the infant/child is no longer in foster care by updating information on the Participant Demographics screen (see example below). Under Foster Care, select the No radio button.



It may be necessary to issue an EBT card to the non-foster family if the foster family did not return the infant/child's EBT card.

Congratulations!

You have successfully completed the **Between Families**: Transferring a Foster Infant/Child to a Non-Foster Family process.

Out of State

In this scenario you will be generating a Verification of Certification (VOC) for a participant who is leaving the state. VOC documents include participant/family specific information on the current certification that will allow other states to accept and immediately enroll such persons in their program. This document will also include information on the local agency/clinic and will allow for a signature or stamp to validate the information. For migrants, income documentation will be included on the VOC document.

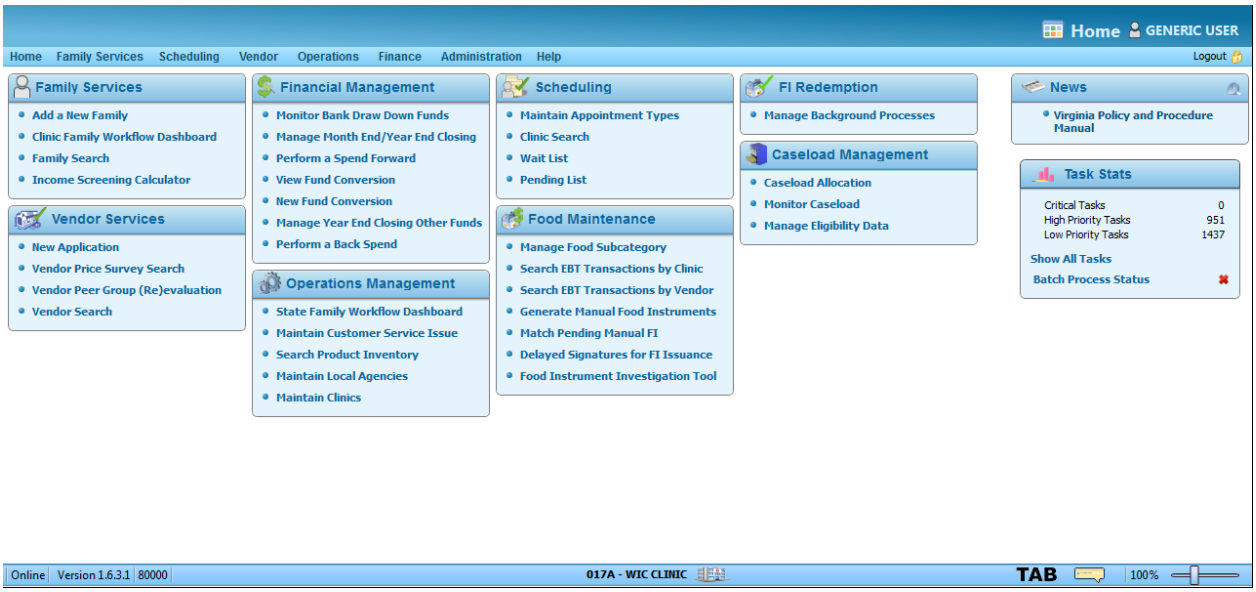
This process includes the following task(s):

Task A. Completing the Transfer **10-43**
Task A. Completing the Transfer **10-48**
Task A. Logging into Crossroads **10-53**
Task B. Using Family Search **10-54**
Task C. Transferring Participants out of the State **10-56**

Task A. Logging into Crossroads

Complete the following step to perform this task:

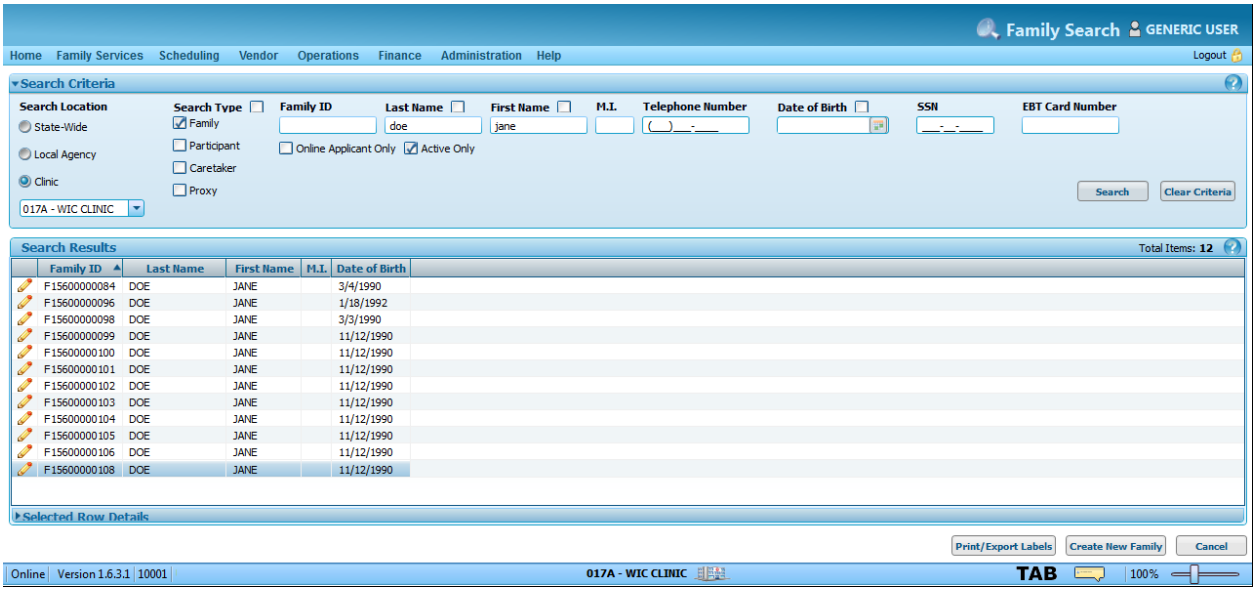
1. Log into the clinic where you will be transferring the family out of due to leaving the state.



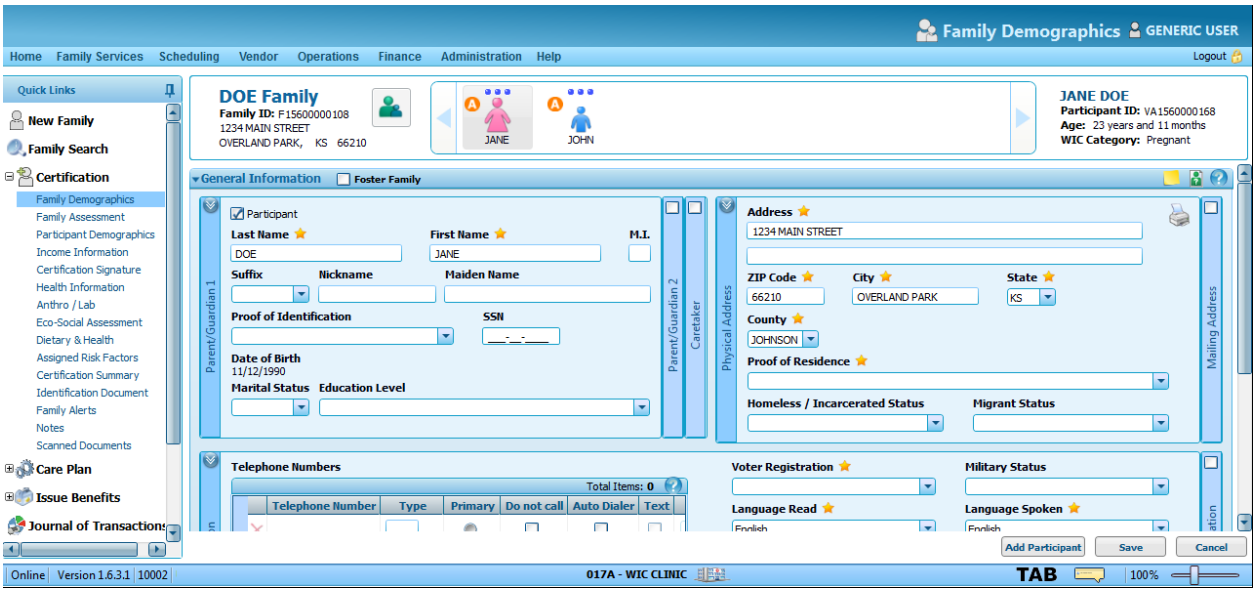
Task B. Using Family Search

Complete the following steps to perform this task:

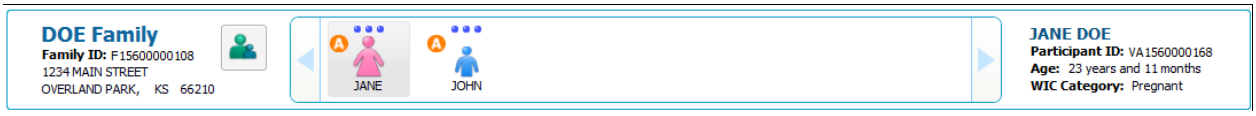
1. Go to **Family Services → Family Search**. The **Family Search** screen displays.
2. Conduct a search for the family (or participant) that will be transferring out of the state.



3. Click the **Edit** button ( ) to access (or open) the record. The **Family Demographics** screen displays.



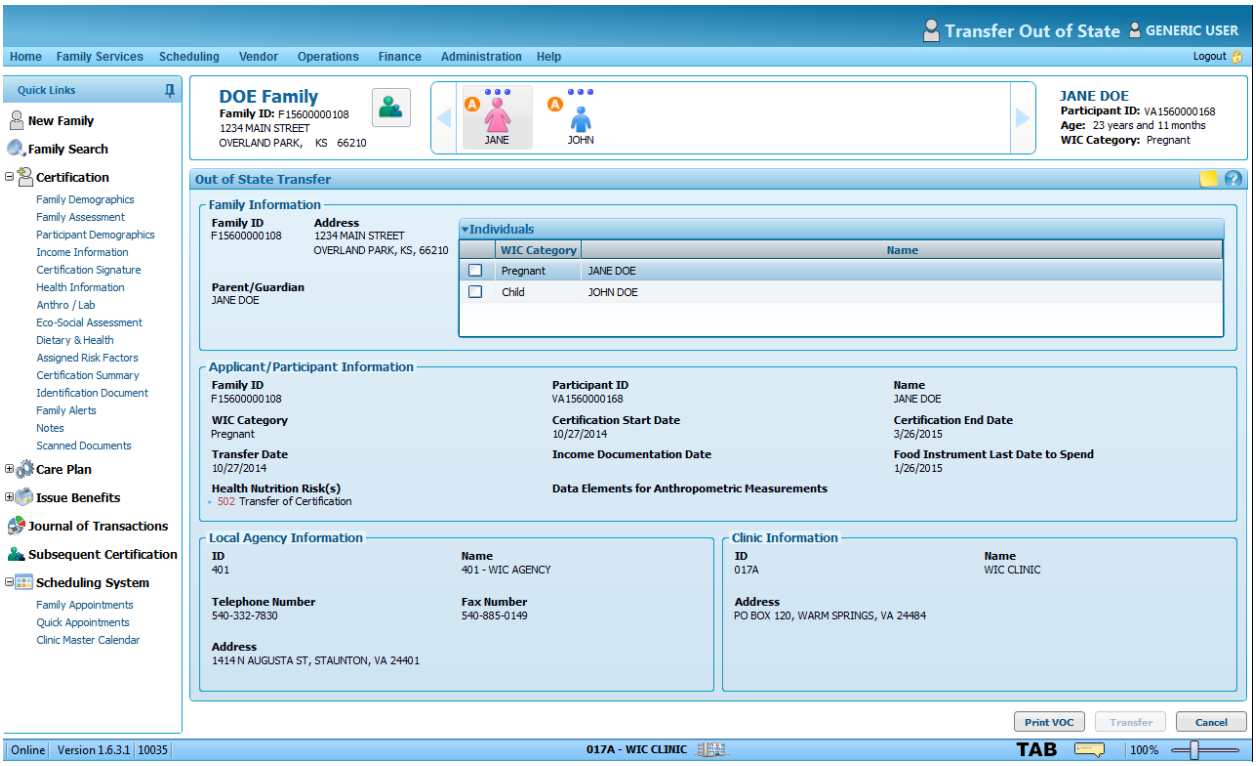
4. Examine the details for the participant and family on the **Family Demographics** screen to confirm you have the correct participant.



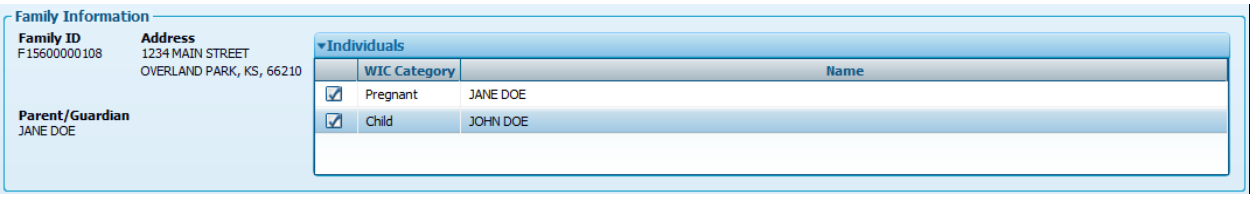
Task C. Transferring Participants out of the State

Complete the following steps to perform this task:

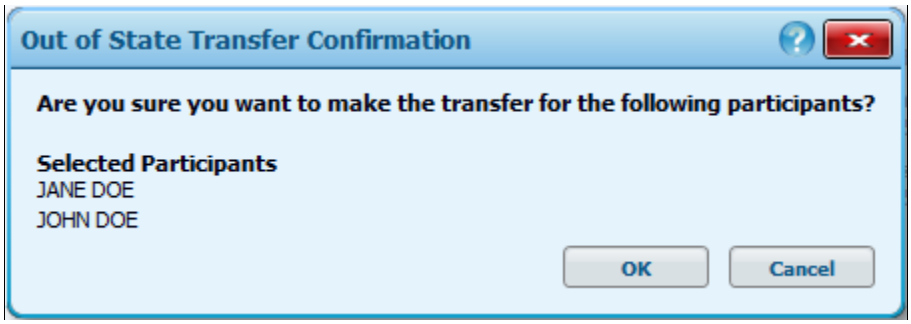
1. Go to **Family Services → Transfer → Out of State**. The **Transfer Out of State** screen displays.



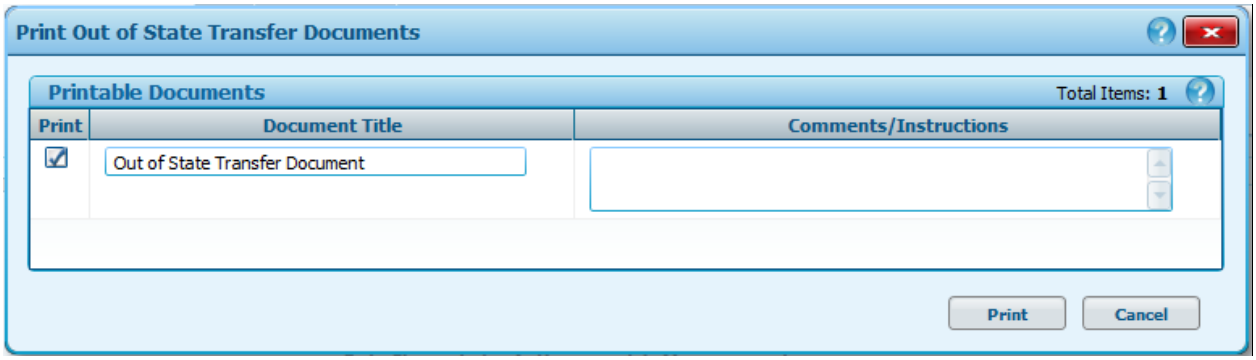
2. Select the family members that will be transferring out of state.



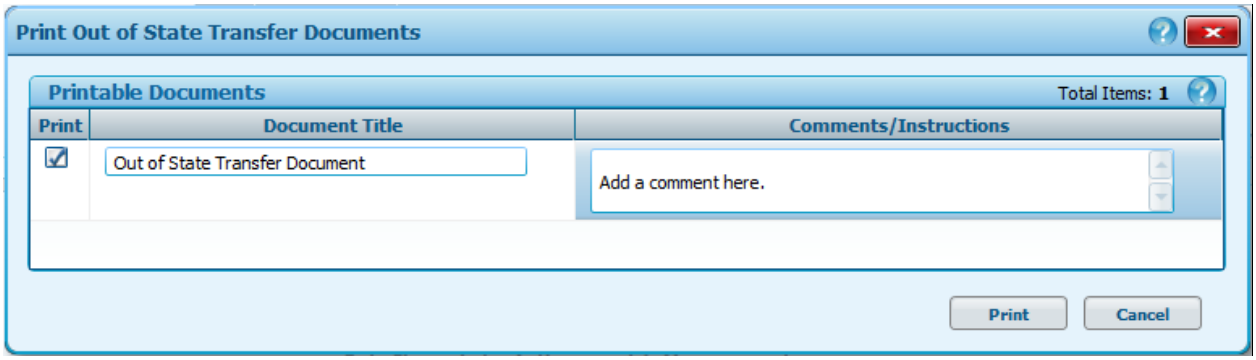
3. Click **Transfer**. An **Out of State Transfer Confirmation** screen displays with the participants listed to transfer out of state.



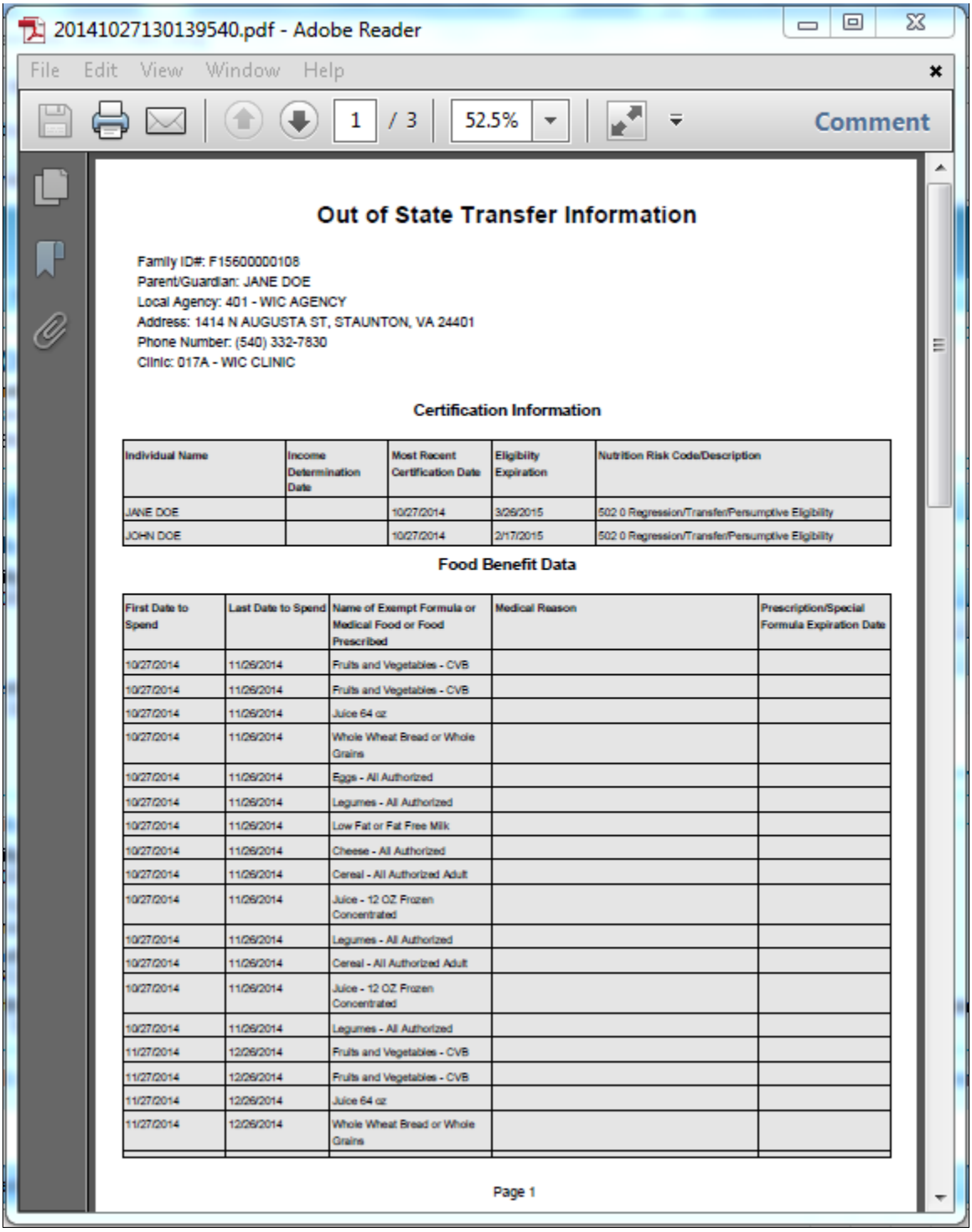
4. Click **OK**. The **Print Out of State Transfer Documents** screen displays.



5. Enter comments within the **Comments/Instructions** text box, if necessary.



6. Click **Print**. The **Out of State Transfer Document** displays as a PDF.



20141027130139540.pdf - Adobe Reader

File Edit View Window Help

1 / 3 52.5% Comment

Out of State Transfer Information

Family ID#: F15600000108
Parent/Guardian: JANE DOE
Local Agency: 401 - WIC AGENCY
Address: 1414 N AUGUSTA ST, STAUNTON, VA 24401
Phone Number: (540) 332-7830
Clinic: 017A - WIC CLINIC

Certification Information

Individual Name	Income Determination Date	Most Recent Certification Date	Eligibility Expiration	Nutrition Risk Code/Description
JANE DOE		10/27/2014	3/26/2015	502 0 Regression/Transfer/Presumptive Eligibility
JOHN DOE		10/27/2014	2/17/2015	502 0 Regression/Transfer/Presumptive Eligibility

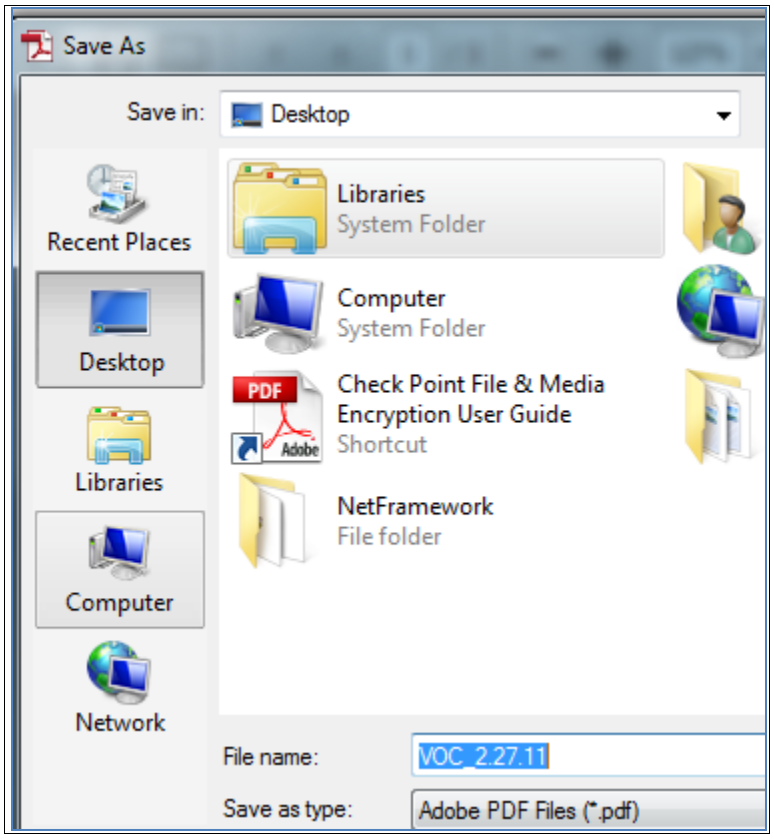
Food Benefit Data

First Date to Spend	Last Date to Spend	Name of Exempt Formula or Medical Food or Food Prescribed	Medical Reason	Prescription/Special Formula Expiration Date
10/27/2014	11/26/2014	Fruits and Vegetables - CVB		
10/27/2014	11/26/2014	Fruits and Vegetables - CVB		
10/27/2014	11/26/2014	Juice 64 oz		
10/27/2014	11/26/2014	Whole Wheat Bread or Whole Grains		
10/27/2014	11/26/2014	Eggs - All Authorized		
10/27/2014	11/26/2014	Legumes - All Authorized		
10/27/2014	11/26/2014	Low Fat or Fat Free Milk		
10/27/2014	11/26/2014	Cheese - All Authorized		
10/27/2014	11/26/2014	Cereal - All Authorized Adult		
10/27/2014	11/26/2014	Juice - 12 OZ Frozen Concentrated		
10/27/2014	11/26/2014	Legumes - All Authorized		
10/27/2014	11/26/2014	Cereal - All Authorized Adult		
10/27/2014	11/26/2014	Juice - 12 OZ Frozen Concentrated		
10/27/2014	11/26/2014	Legumes - All Authorized		
11/27/2014	12/26/2014	Fruits and Vegetables - CVB		
11/27/2014	12/26/2014	Fruits and Vegetables - CVB		
11/27/2014	12/26/2014	Juice 64 oz		
11/27/2014	12/26/2014	Whole Wheat Bread or Whole Grains		

Page 1

7. To print the document, click the print button (). A standard print screen displays. Select the desired printer and print the document.

8. To save the document locally or to a network drive, please do the following:
   a. Click **File** on the menu bar.
   b. Select **Save As**.
   c. Select the location to save the file and rename the document.
   d. Click **Save**. The document is now saved to the specified location.



9. View the **Family Header**. The selected family member icons within the **Family Header** now display a **T** indicating termination.

Congratulations!

You have successfully completed the **Out of State** process.

Into State: Into a New Family Record

The **Transfer Into State** screen is used to transfer participants into the state WIC program when they have a VOC document from another WIC program. The VOC document must be accepted as proof of eligibility for benefits and is valid until the end of the certification period. This scenario describes the process of transferring out-of-state families into your state, by creating a new family record.

This process includes the following task(s):

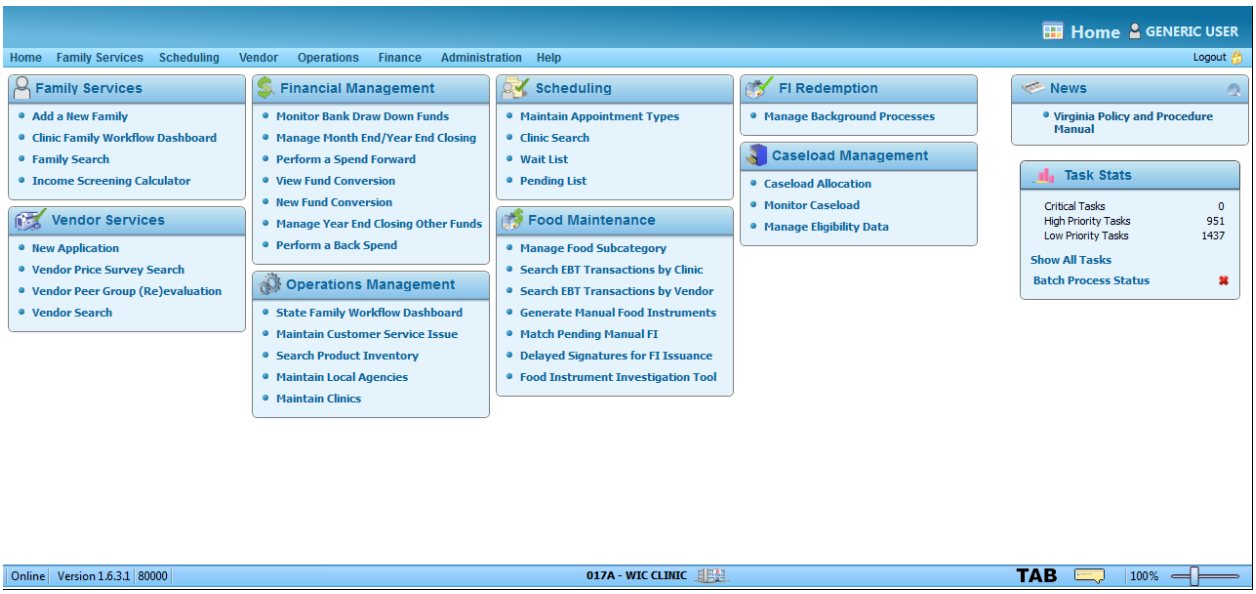
Task A. Logging into Crossroads **10-61**
Task B. Using Family Search **10-62**
Task C. Creating a New Family **10-64**
Task D. Transferring Participants into the State **10-66**

Task A. Logging into Crossroads

The following scenario will focus on processing out-of-state families who are new to WIC into your state.

Complete the following steps to perform this task:

1. Log into the receiving clinic.

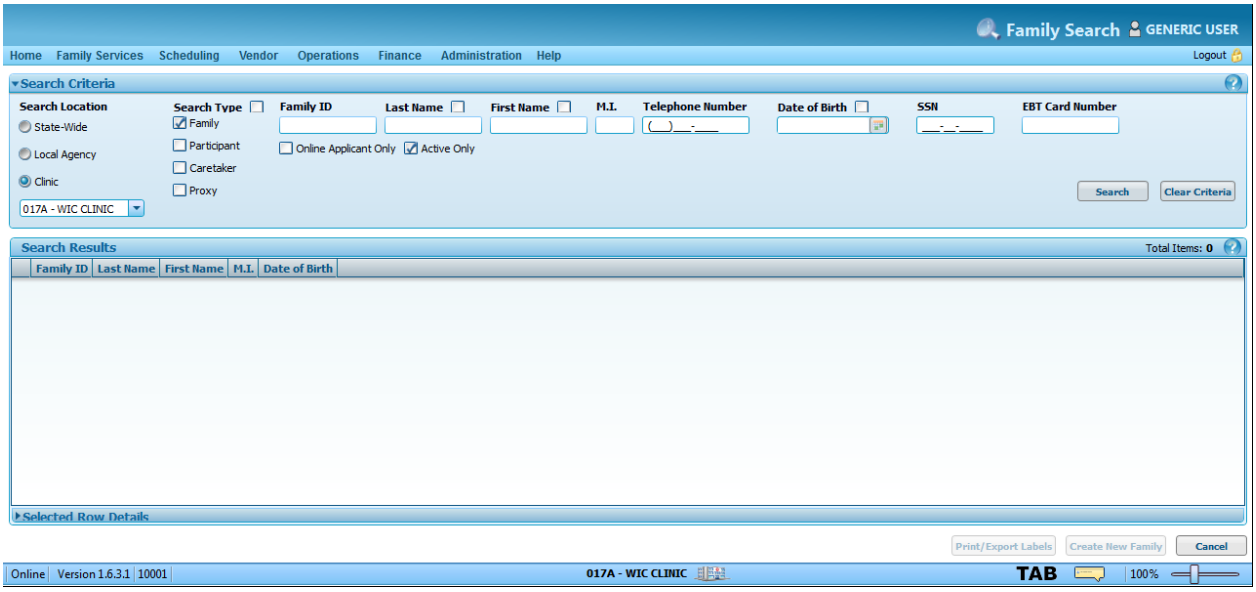


Crossroads uses a pull only transfer process. You must be logged into the clinic where the family will be receiving services to transfer them into the clinic.

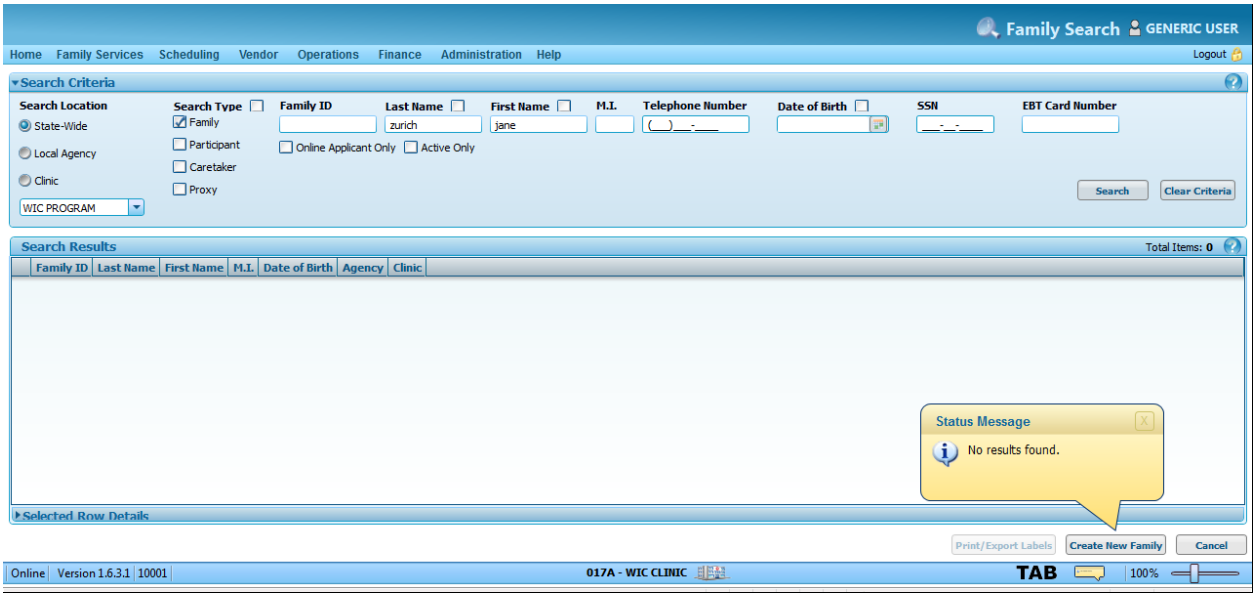
Task B. Using Family Search

Complete the following steps to perform this task:

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



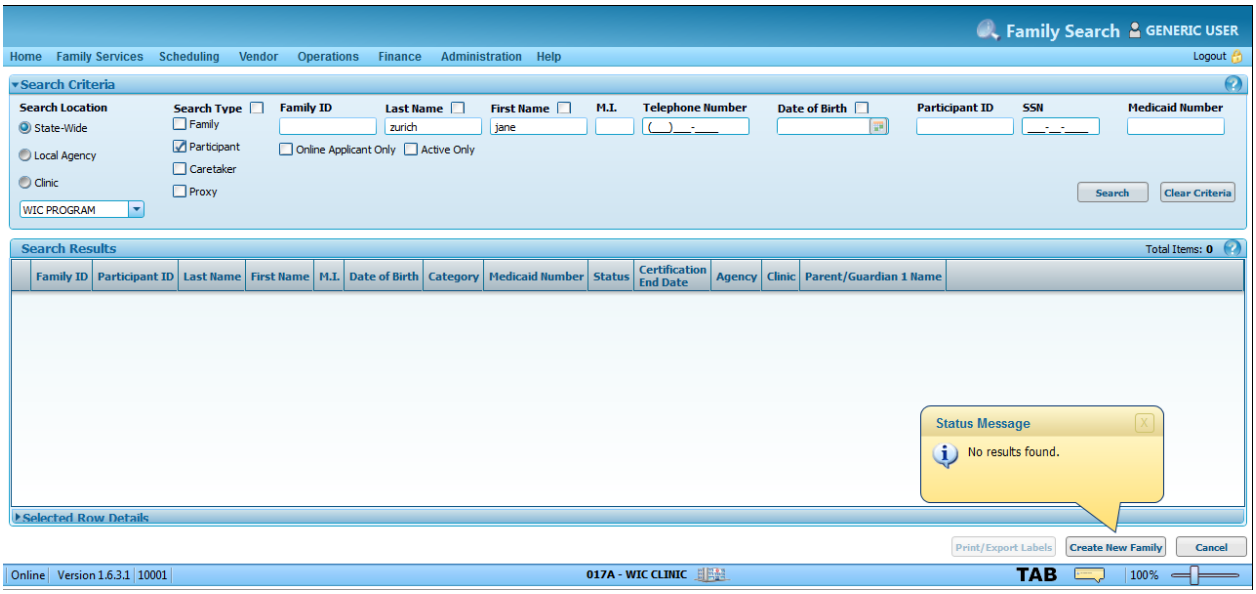
2. Conduct a state-wide search for the family to ensure they are not currently in the system.



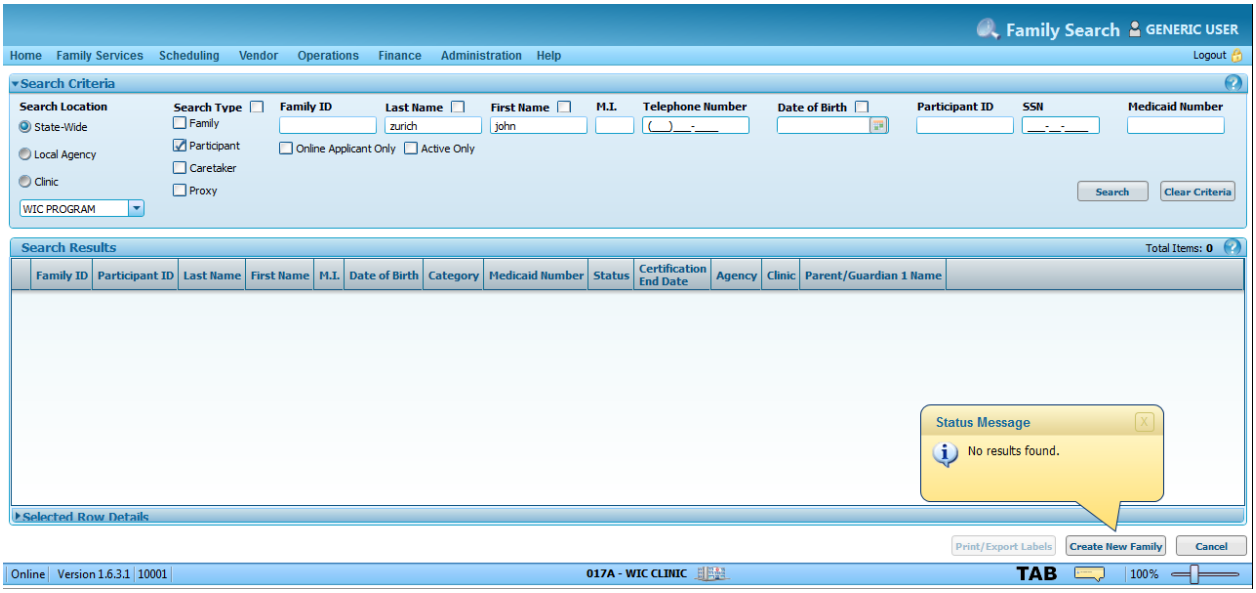
It may be a good idea to clear the Active Only check box, so that both active and inactive records are included in the search.

3. Conduct a state-wide search for each participant in the family to ensure they are not currently in the system.

- Jane Zurich



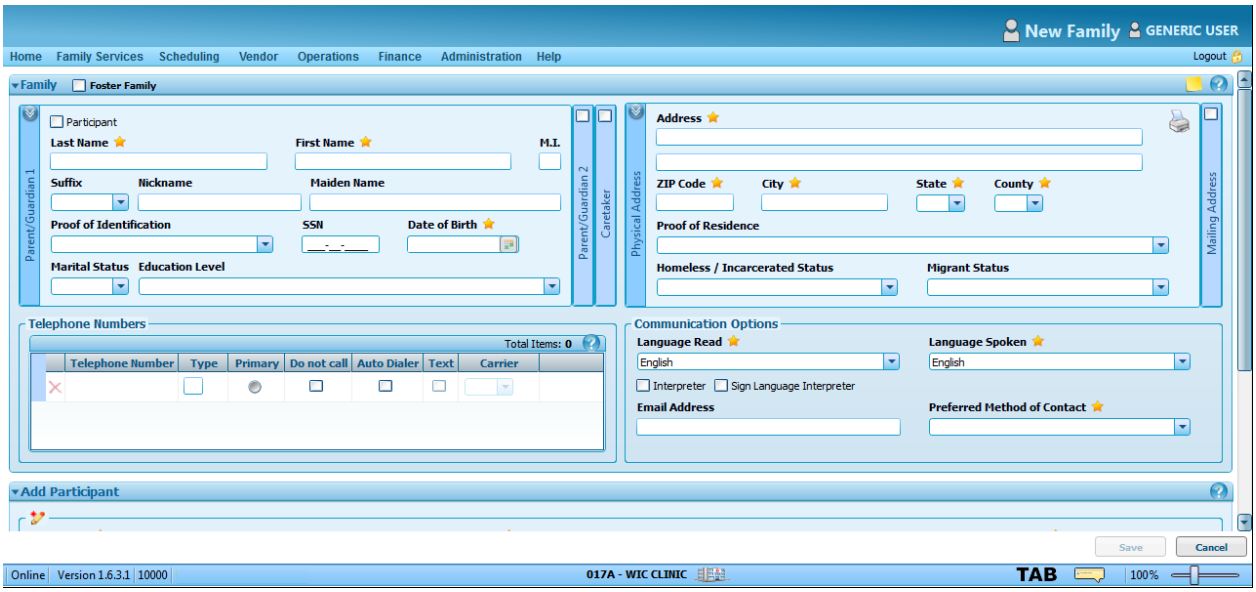
- John Zurich



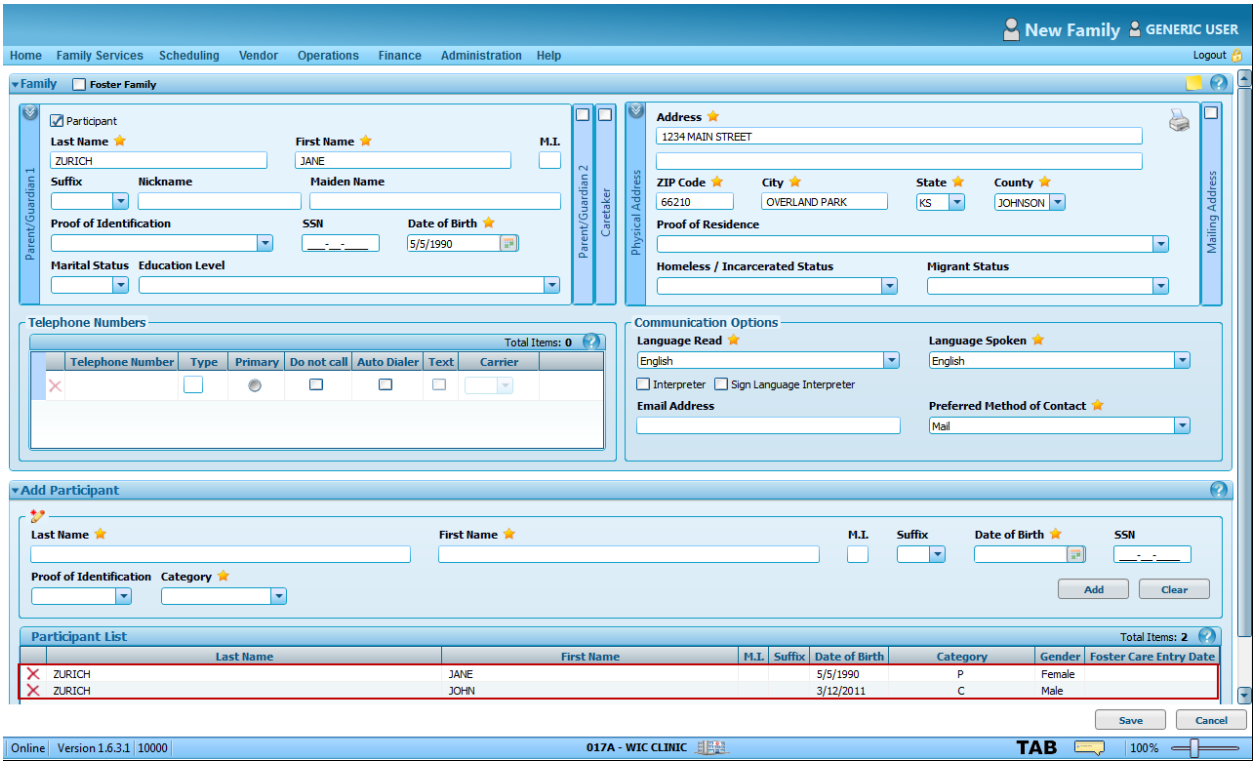
Task C. Creating a New Family

Complete the following steps to perform this task:

1. After the necessary family and participant searches have been conducted, and while still on the **Family Search** screen, click **Create New Family**. The **New Family** screen displays.

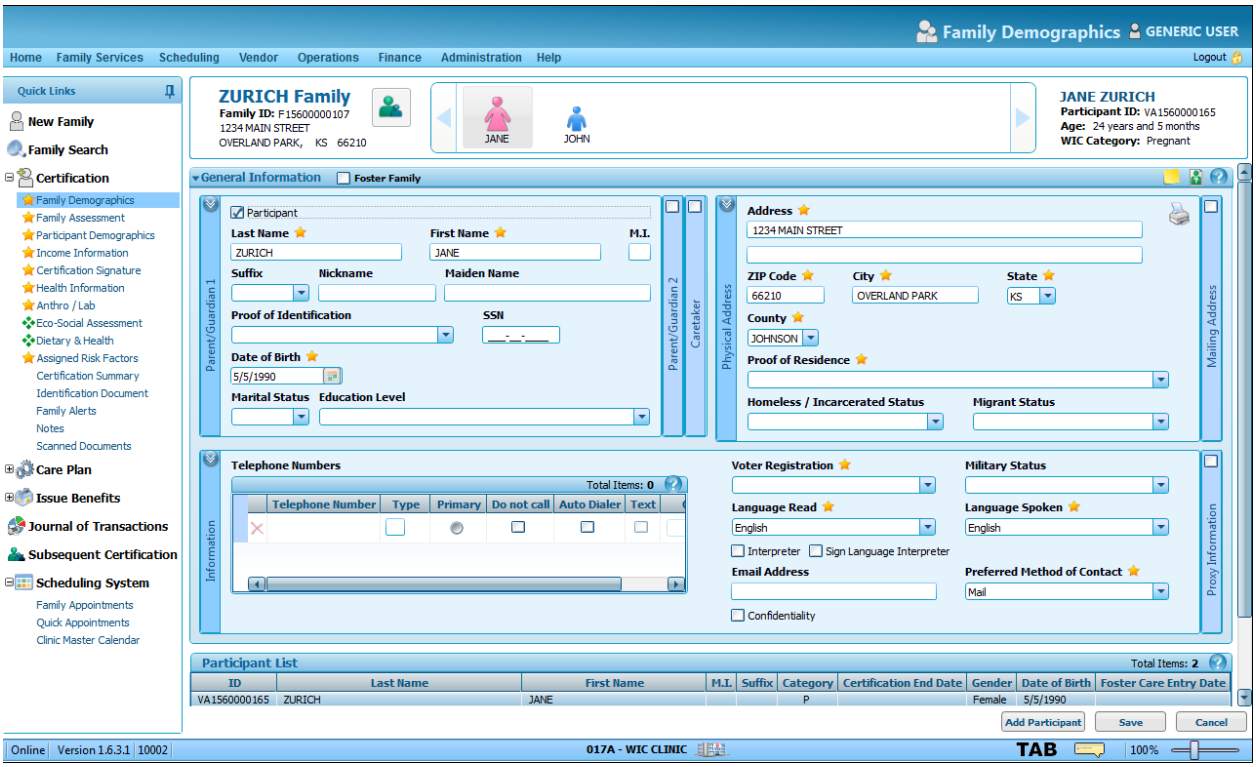


2. Complete the **New Family** screen adding each member of the family that intends to participate.



For more detail about adding a new family, consult the New Family scenario.

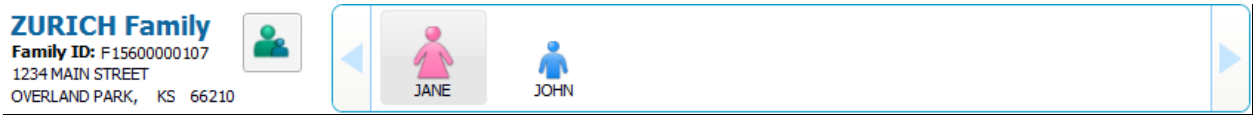
3. Click **Save**. The **Family Demographics** screen displays.



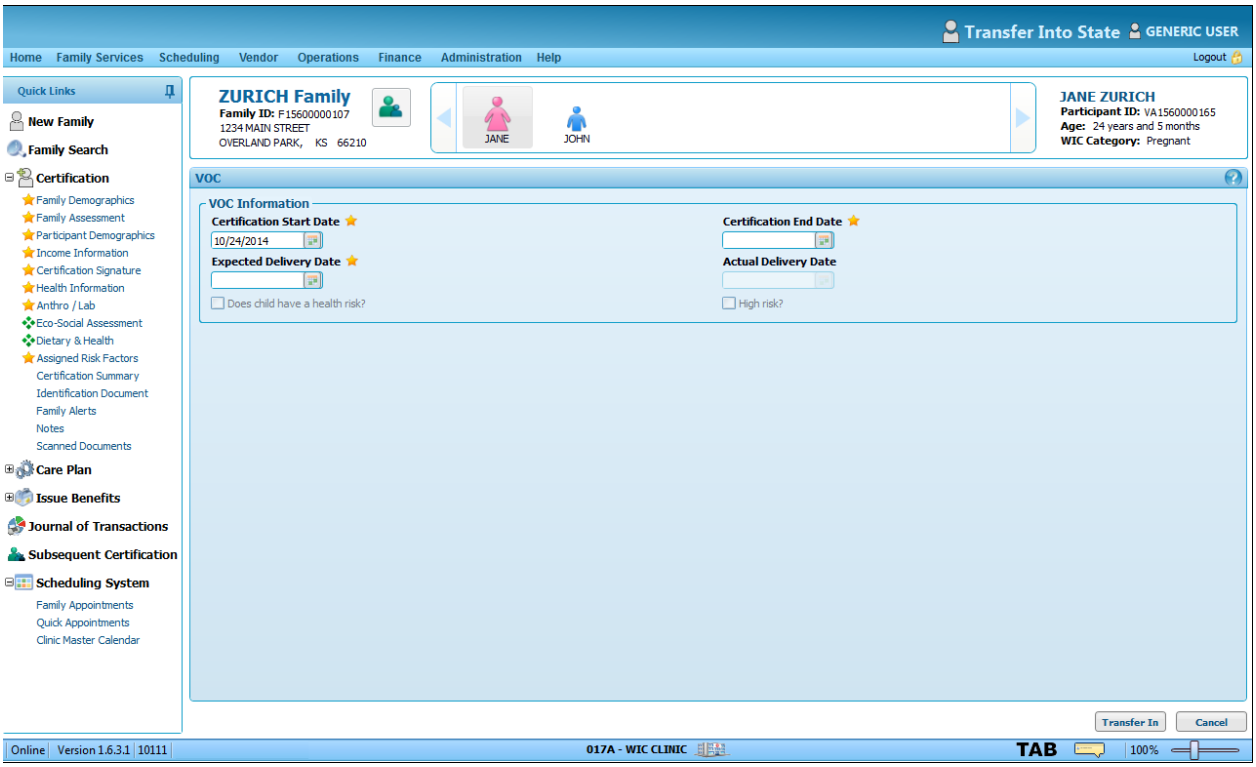
Task D. Transferring Participants into the State

Complete the following steps to perform this task:

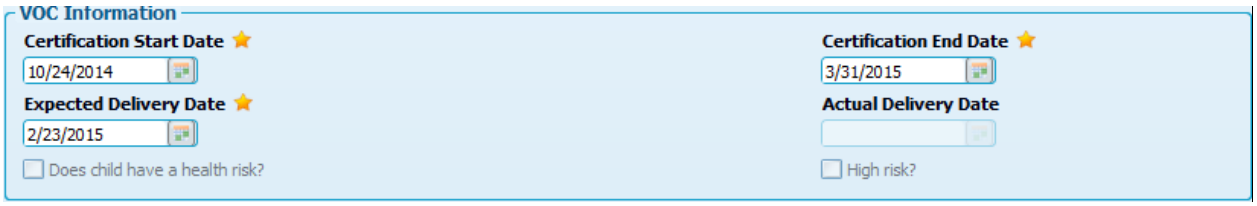
1. Select a family member from within the **Family Header**.



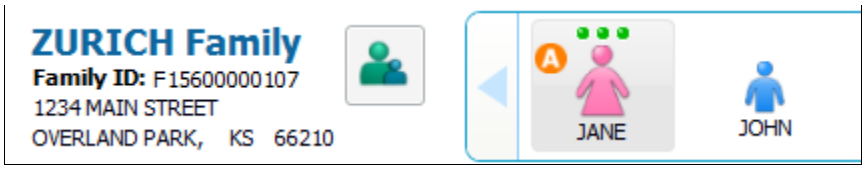
2. Go to **Family Services → Transfer→ Into State**. The **Transfer Into State** screen displays.



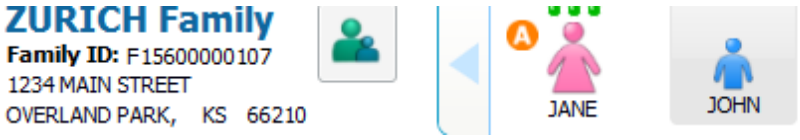
3. Using the information from the Verification of Certification (VOC) document:
   - Enter the **Certification Start Date**.
   - Enter the **Certification End Date**.
   - Enter the **Expected Delivery Date**, if applicable.
   - Enter the **Actual Delivery Date**, if applicable.
   - Select the **Does child have a health risk** check box, if applicable.
   - Select the **High risk** check box, if applicable.



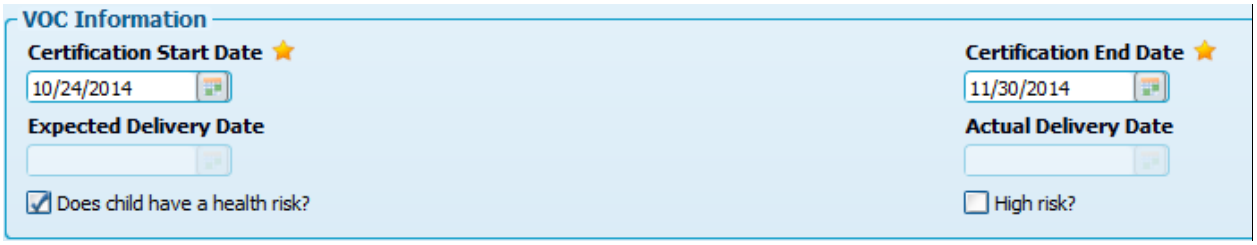
4. Click **Transfer In**. A status message displays indicating the out of state transfer was completed successfully and an active symbol is added to the selected member's icon within the **Family Header**.



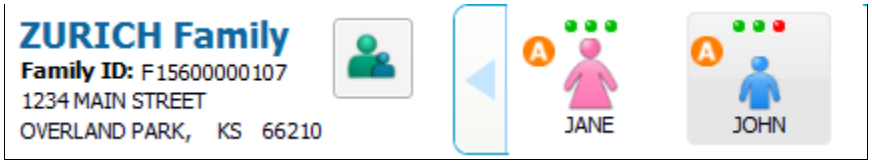
5. Repeat the process for each member of the family (that has a VOC document) to transfer them into the state by:
   - Selecting the member in the Family Header



   - Enter the Certification start/end dates, delivery dates, and select health/risk indicators.



- Click **Transfer In**.



The number of benefits that can be issued for each participant is determined by the Certification End Date that was entered by the user and indicated by issuance Available dots (•••) on each member's icon. In the example above, Jane is eligible for three months of benefits and John is eligible for two months of benefits.

Before benefits can be issued, a food prescription must be added for each member. Additionally, depending on the configuration of the state (paper food instruments or EBT), the user may need to issue an Identification Document or an EBT card.

Congratulations!

You have successfully completed the Transfer **Into State: Into a New Family Record** process.

Into State: Into an Existing Family Record

This scenario describes the process of transferring an out-of-state family/participant into your state and into an existing family record. The WIC family or participant who is now in an active certification period in another state and who has a VOC verifying current status will be transferred into your current clinic location.

This process includes the following task(s):

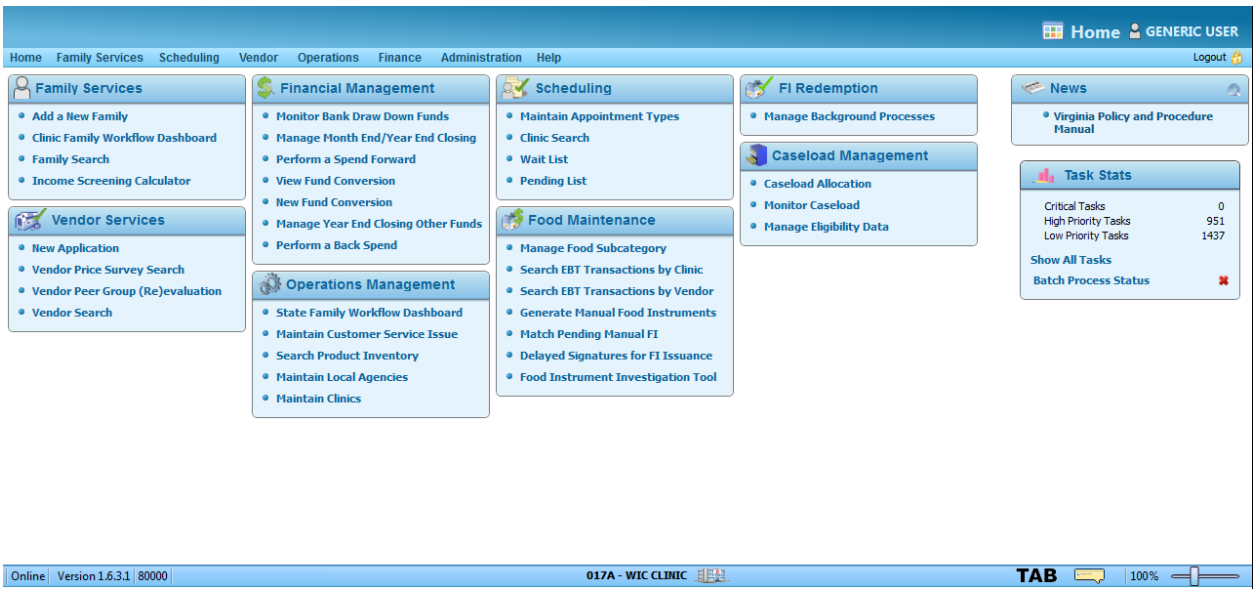
Task A. Logging into Crossroads **10-70**
Task B. Using Family Search **10-71**
Task C. Transferring Participants into the State **10-74**

Task A. Logging into Crossroads

This next scenario focuses on returning out-of-state families who already have WIC records into the WIC system.

Complete the following steps to perform this task:

1. Log in to the clinic where you will be transferring the family.

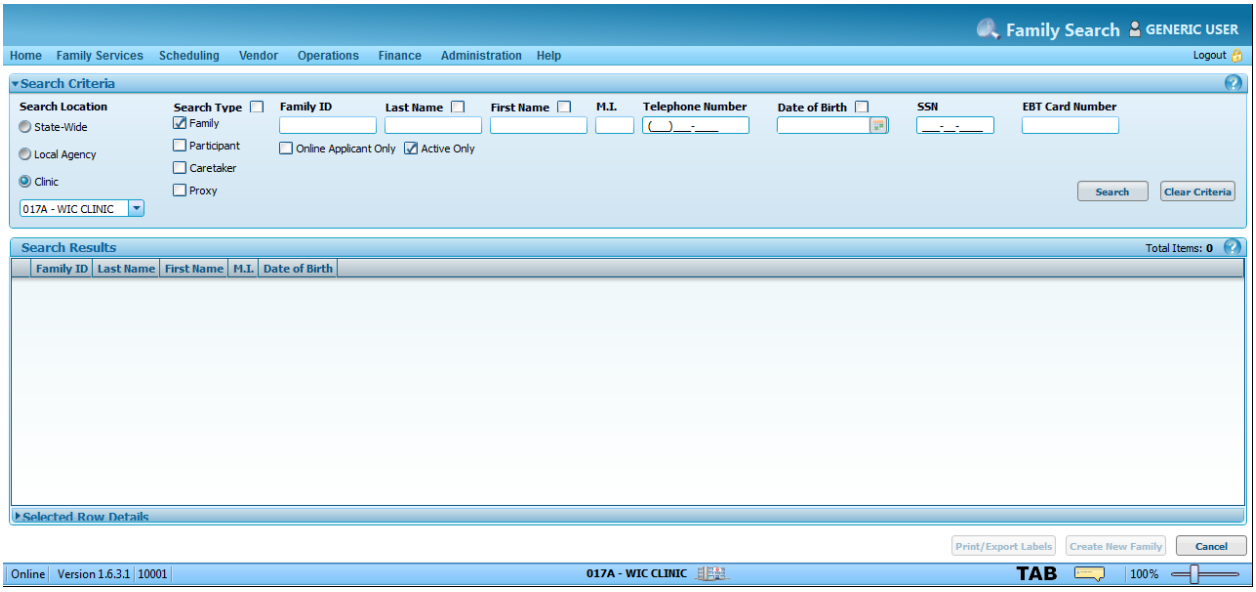


Crossroads uses a pull only transfer process. You must be logged into the clinic where the family will be receiving services to transfer them into the clinic.

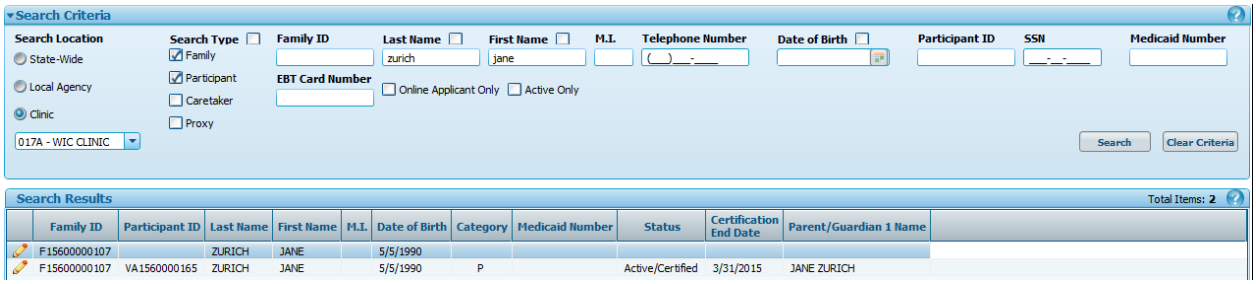
Task B. Using Family Search

Complete the following steps to perform this task:

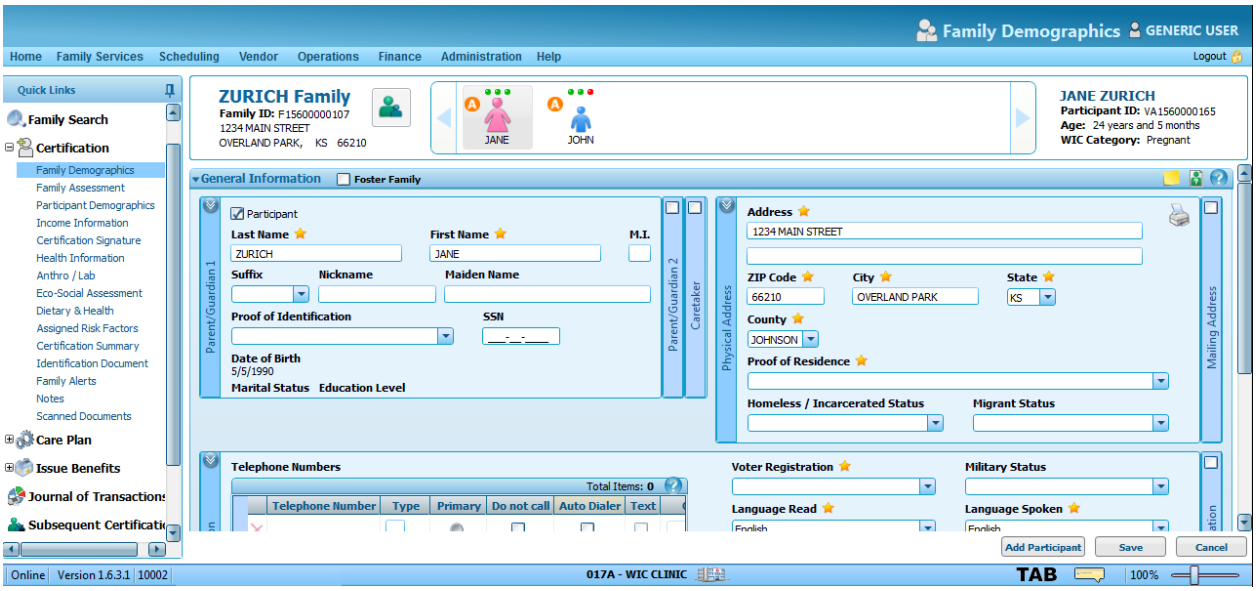
1. Go to **Family Services → Family Search**. The **Family Search** screen displays.



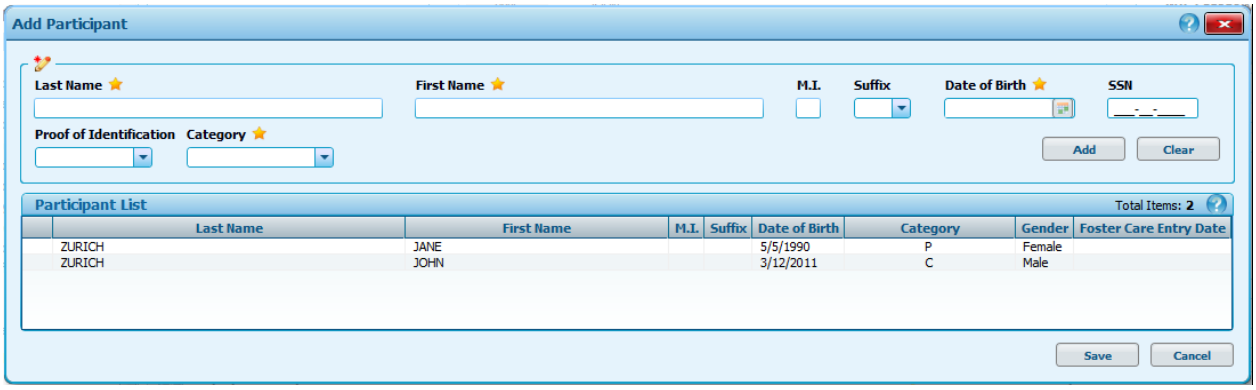
2. Conduct a search for the existing family and transfer them into clinic, if necessary.



3. Click the **Edit** button ( ) to access (or open) the record. The **Family Demographic** screen displays.



4. Click **Add Participant** to add a member to the existing family. The **Add Participant** screen displays.

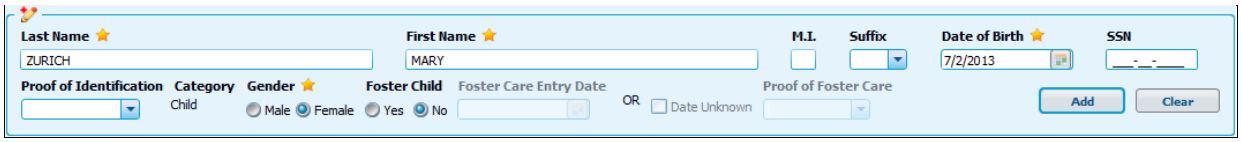


The Add Participant screen is the bottom portion of the New Family screen. Use it to add a new member to the existing family.

On display of the screen, the Participant List grid displays the current members of the existing family.

5. Complete the following for each new member and then click **Add**:

- Last Name
- First Name
- Middle Initial (M.I.)
- Date of Birth
- Proof of Identification
- Category
- Gender

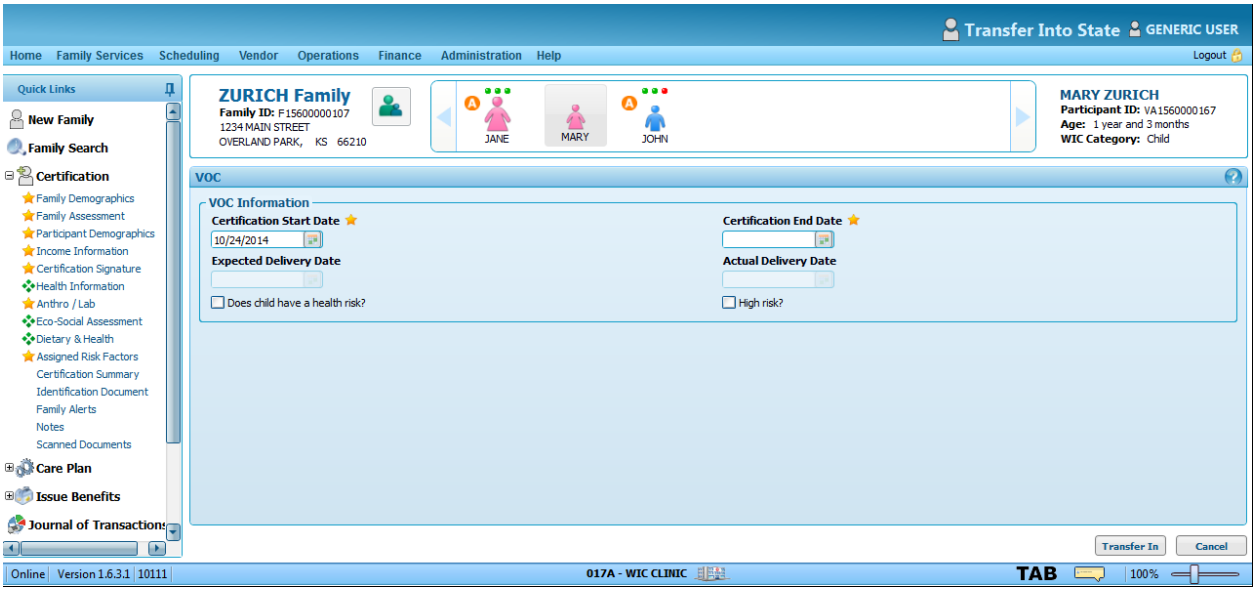


Task C. Transferring Participants into the State

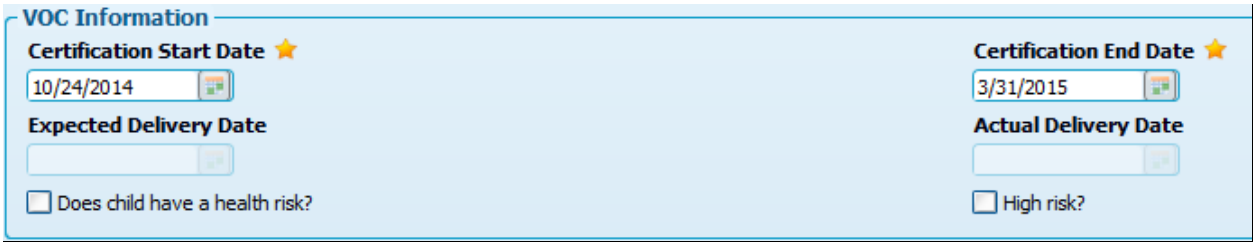
Complete the following steps to perform this task:

1. Select an icon of a newly added member within the **Family Header**.

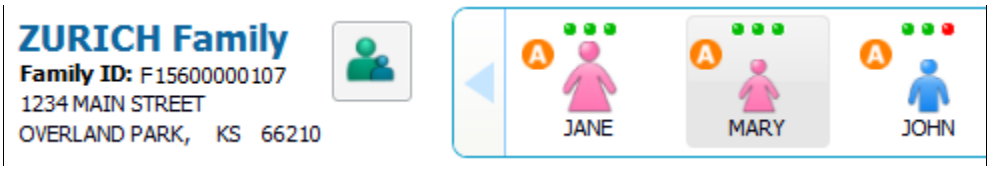
2. Go to **Family Services → Transfer→ Into State**. The **Transfer Into State** screen displays.



3. Using the information from the Verification of Certification (VOC) document:
   - Enter the **Certification Start Date**.
   - Enter the **Certification End Date**.
   - Enter the **Expected Delivery Date**, if applicable.
   - Enter the **Actual Delivery Date**, if applicable.
   - Select the **Does child have a health risk** check box, if applicable.
   - Select the **High risk** check box, if applicable.



4. Click **Transfer In**. A status message displays indicating the out of state transfer was completed successfully and an active symbol is added to the selected member's icon within the **Family Header**.



5. Repeat the Task C process, as necessary, for each newly added member of the family.

Congratulations!

You have successfully completed the Transfer **Into State: Into an Existing Family Record** process.

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11- JOURNAL OF TRANSACTIONS

Journal of Transactions

The **Journal of Transactions** screen allows you to choose a particular view of an individual or family's history of transactions. You may choose to view an individual or family history of transactions by a selected application area, i.e., certification, prescribed foods, and so forth. The system displays transaction information for a selected application, with the ability to filter the information by individual, family and date. This process assumes you have searched for and accessed a family record.

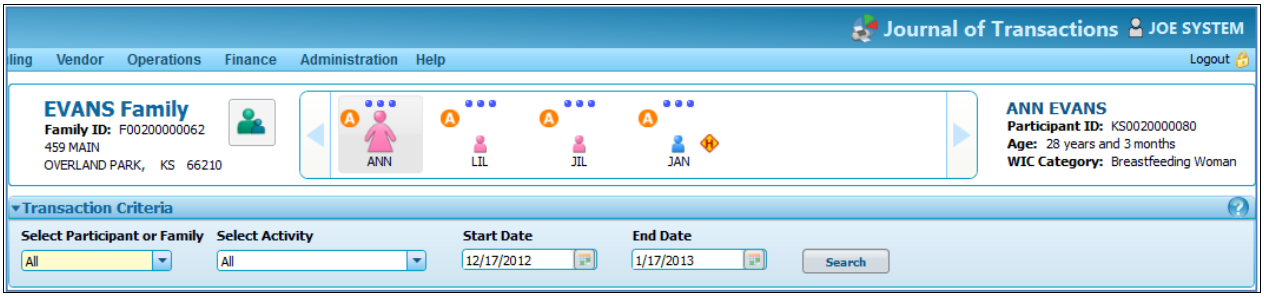
This process includes the following task(s):

Task A. Searching and Sorting Journal Transaction History 11-2

Task A. Searching and Sorting Journal Transaction History

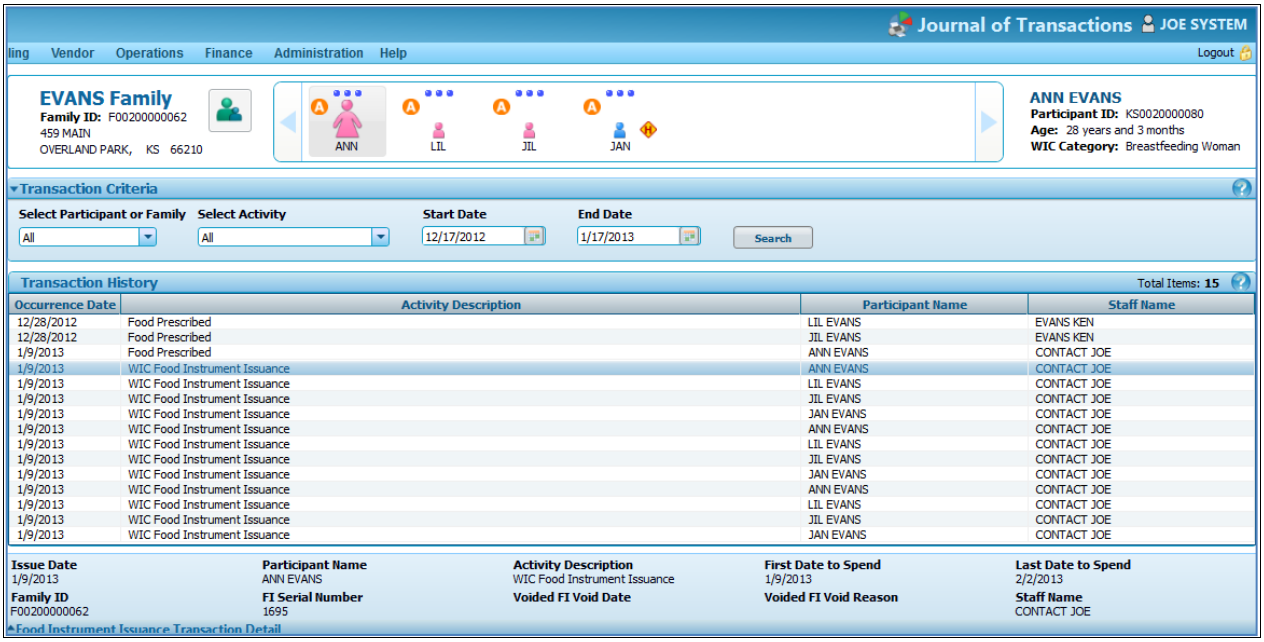
Complete the following steps to perform this task:

1. Go to **Quick Links → Journal of Transaction**. The **Journal of Transactions** screen displays.
2. Under **Transaction Criteria**, select the applicable search criteria:
   a. Select **Participant** or **Family** from the drop down menu.
   b. Select **Activity**.
   c. Enter or select the **Start Date**.
   d. Enter or select the **End Date**.
3. Click **Search**. The screen refreshes and the search results display within the **Transaction History** grid.



When searching by start and end dates, all the family transactions display on the Transaction History grid. The system displays the occurrence date of the activity, the activity, the name of the participant, and the name of the WIC staff member.

4. Click a **Transaction History** row from the **Transaction History** grid.
5. Click **Food Instrument Issuance Transaction Detail** at the bottom of the screen. Details display for the participant and the activity selected.



Click a column header to resort the information in the grid.

Congratulations!

You have successfully completed the **Journal of Transactions** process.

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12- FAMILY SERVICES ANALYSIS

Family Services Analysis

The **Family Services Analysis** screen allows you to view the average total customer appointment time, wait times, service times, and appointment and functional statistics for a local agency.

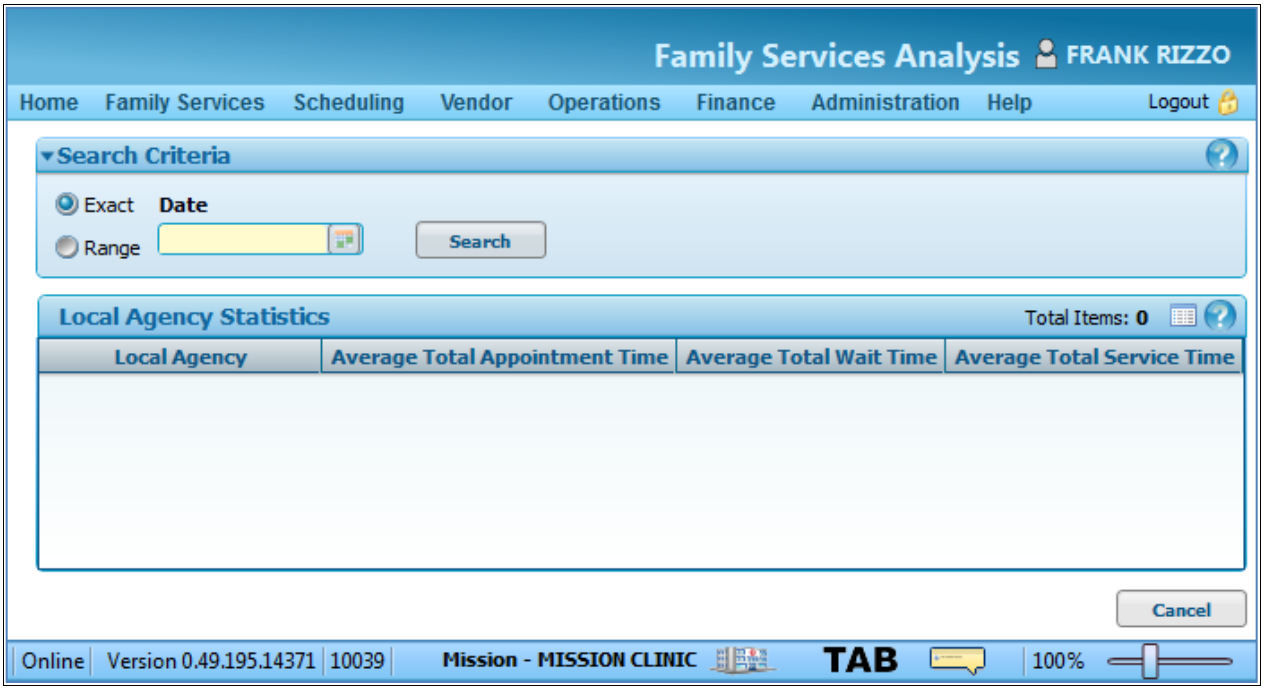
This process includes the following task(s):

Task A. Viewing Local Agency Statistics 12-2

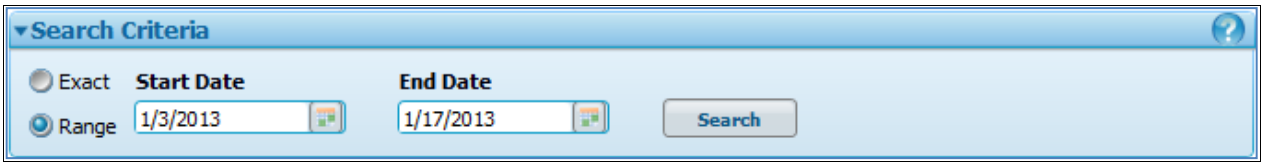
Task A. Viewing Local Agency Statistics

Complete the following steps to perform this task:

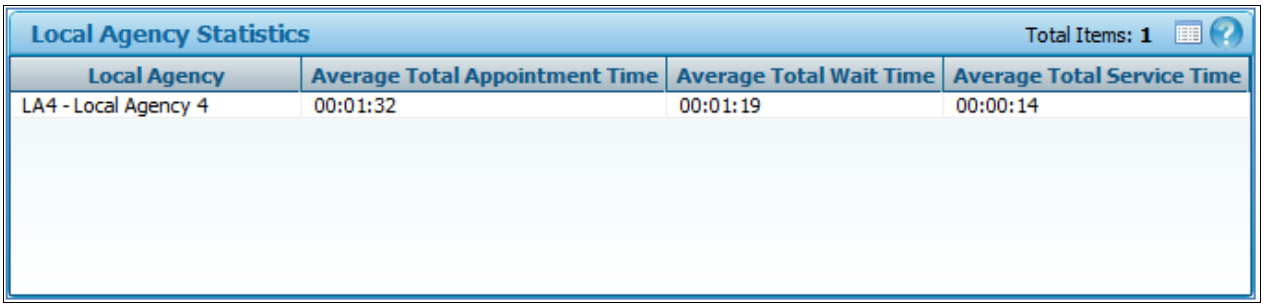
1. Go to **Family Services → Family Services Analysis**. The **Family Services Analysis** screen displays.



2. Under **Search Criteria**, select **Exact** or **Range** and then enter and exact date or a range of dates.



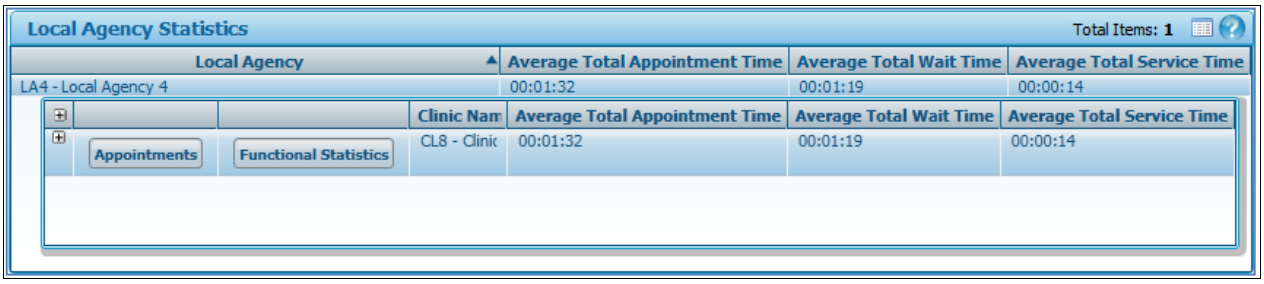
3. Click **Search**. The screen refreshes and displays the results of the search in the **Local Agency Statistics** grid.



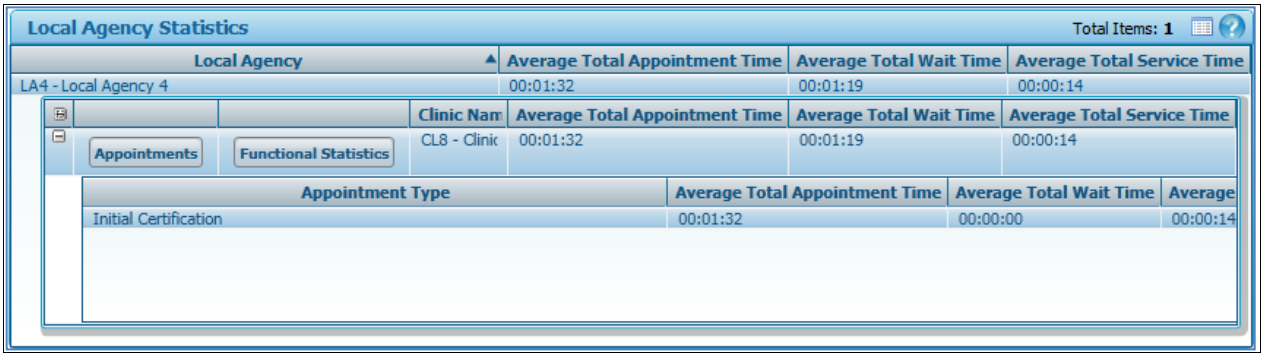
The Local Agency Statistics grid includes the Local Agency, Average Total Appointment Time, Average Total Wait Time, and Average Total Service Time for all local agency statistics matching the search criteria.

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.

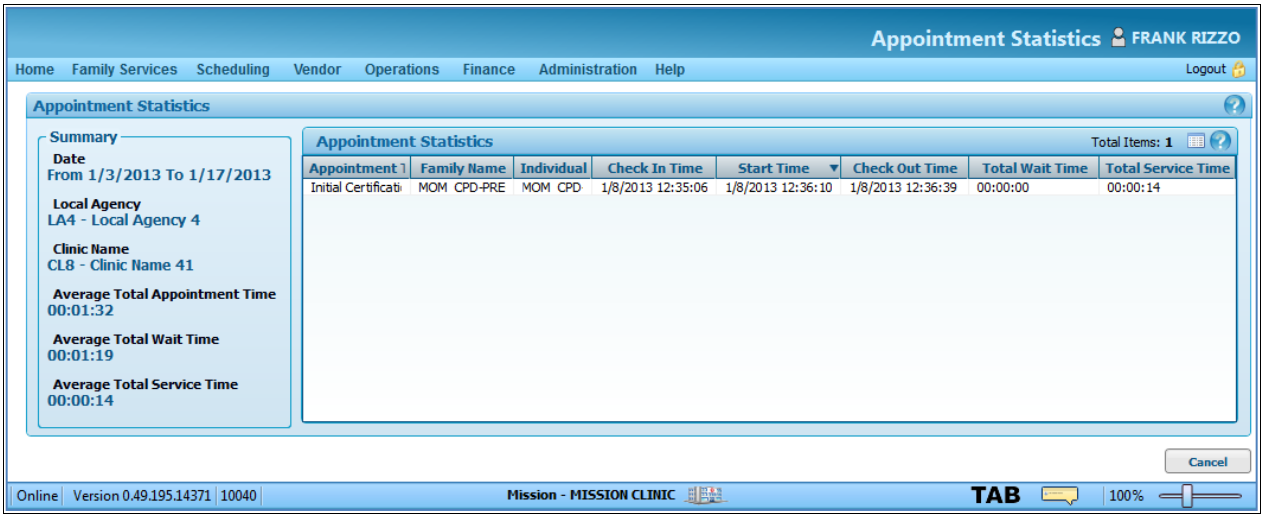
4. Click on a **Local Agency** in the grid. The following screen displays.



5. Click the plus sign (⊞) to expand the screen and display additional details about individual appointments at the clinics in the local agency.



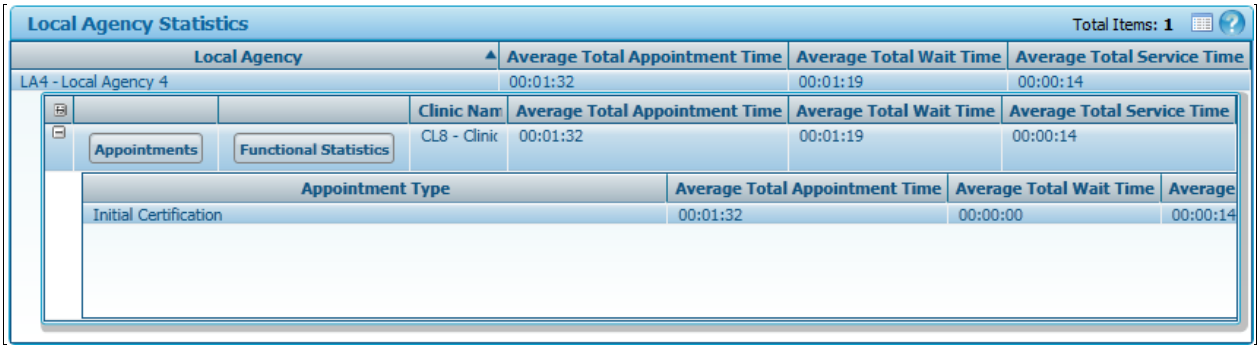
6. Click **Appointments**. The **Appointment Statistics** screen displays.



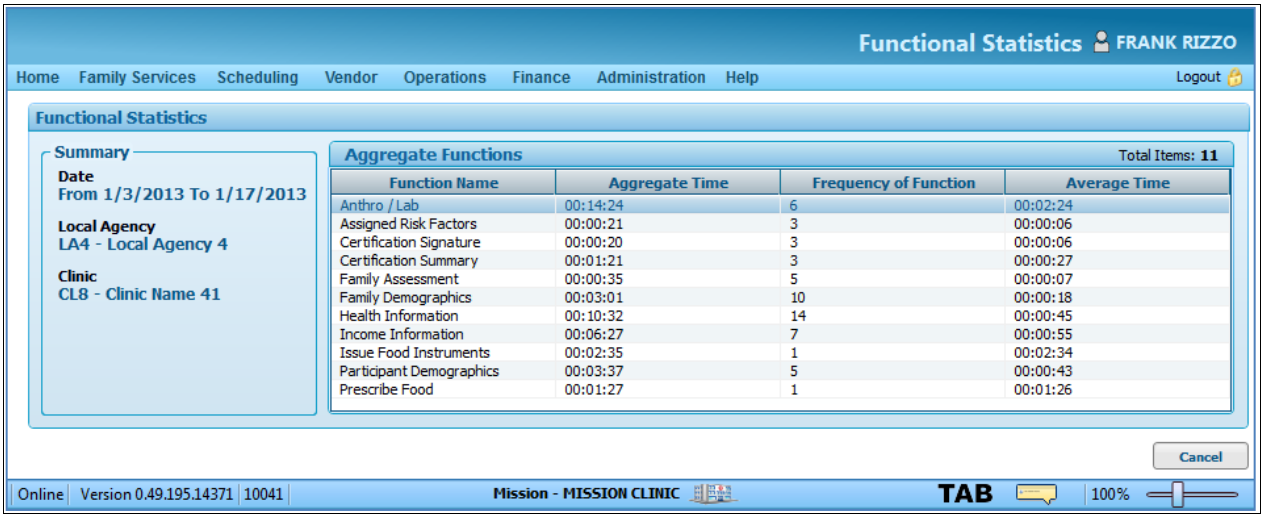
7. Use the **Appointment Statistics** screen to review the appointment summary and statistics.

> The Summary includes the Date or Date Range from your search criteria, as well as the Local Agency, Clinic Name, Average Total Appointment Time, Average Total Wait Time, and Average Total Service Time.
>
> The Appointment Statistics grid includes the Appointment Type, Family Name, Individual Name, Check In Time, Start Time, Check Out Time, Total Wait Time, and Total Service Time for any appointments in the selected date range.

8. Click **Cancel**. The **Family Services Analysis** screen displays.



9. Click **Functional Statistics**. The **Functional Statistics** screen displays.



10. Use the **Functional Statistics** screen to review the agency's functional summary and aggregate functions.

> The Summary includes the Date or Date Range from your search criteria, as well as the Local Agency, and Clinic.
>
> The Aggregate Functions grid includes the Function Name, Aggregate Time, Frequency of Function, and Average Time for functions performed by the agency.

11. Click **Cancel**. The **Family Services Analysis** screen displays.

Congratulations!

You have successfully completed the **Family Services Analysis** process.

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13- CLINIC FAMILY WORKFLOW DASHBOARD

Clinic Family Workflow Dashboard

The **Clinic Family Workflow Dashboard** screen within Crossroads allows users to get a bird's eye view of the clinic and participant status. The dashboard monitors participant flow beginning with participant/applicant check-in at the clinic with status change captured as participant/applicant records are accessed (open or closed). It allows you to see a live view of the clinic activity with appointments in their current stages of progress organized by clinic-configured service rooms. You can also use this screen to create walk-in appointments. The dashboard will allow for WIC staff to monitor clinic flow from the time of check-in to the end of a visit.

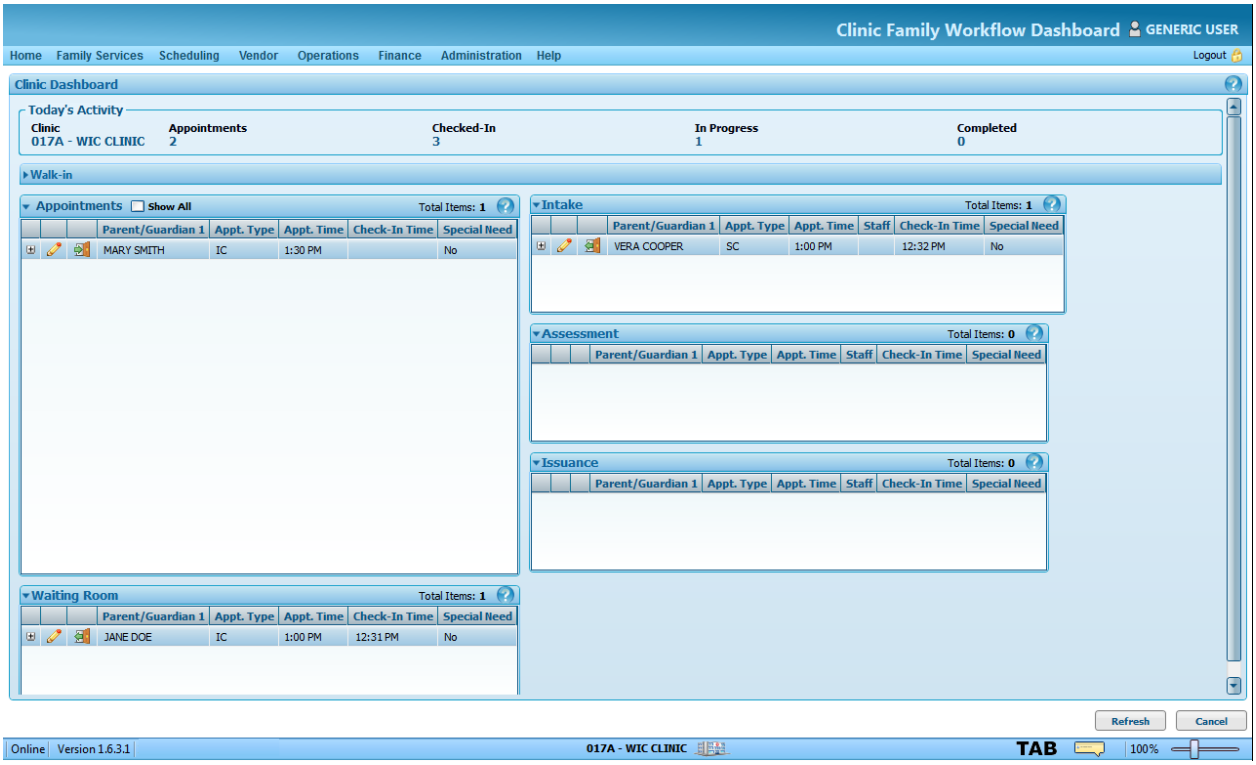
This process includes the following task(s):

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**

Task A. Viewing Clinic Family Workflow Activity

Complete the following steps to perform this task:

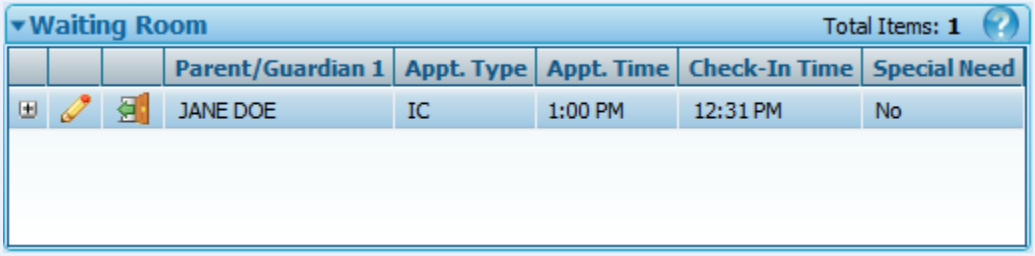
1. From the **Home** screen, go to **Family Services → Clinic Family Workflow Dashboard**. The **Clinic Family Workflow Dashboard** screen displays.



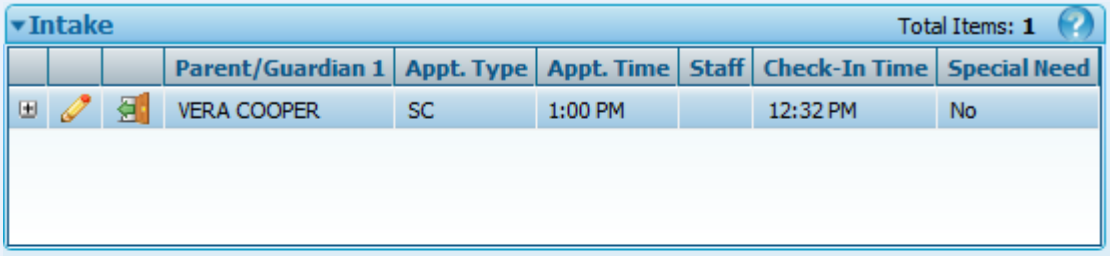
The clinic's appointments for today are summarized under Today's Activity. This summary includes the Clinic location, the Appointments remaining for the day but not yet checked-in, the total number currently Checked-in, the total number currently In Progress, and the total number of appointments Completed.

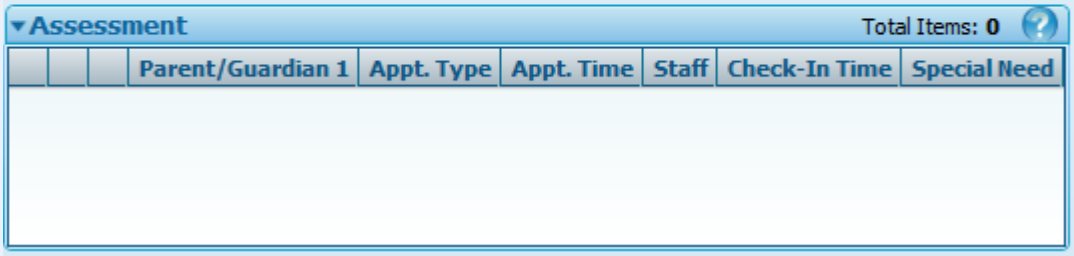
The Appointments grid displays the appointments remaining for the day (using the Family Name) but not yet checked-in. The number of appointments listed in the Appointments grid corresponds to the Appointments value within the Today's Activity group box.

The Waiting Room grid displays the appointments that have been checked-in.

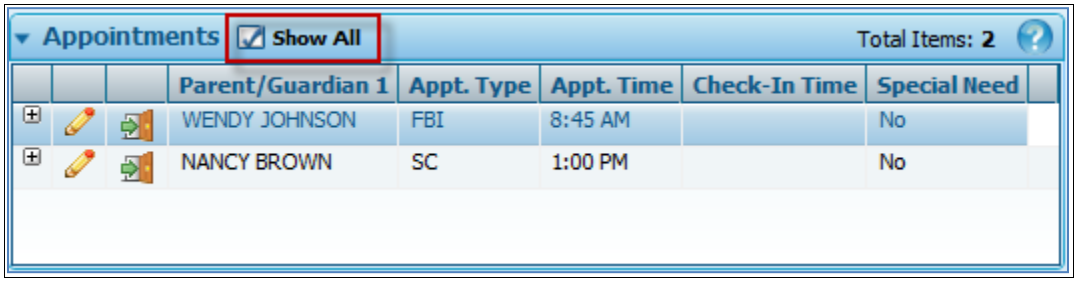


The state defines a number of virtual rooms. The different virtual rooms display the appointments in various stages of completion.

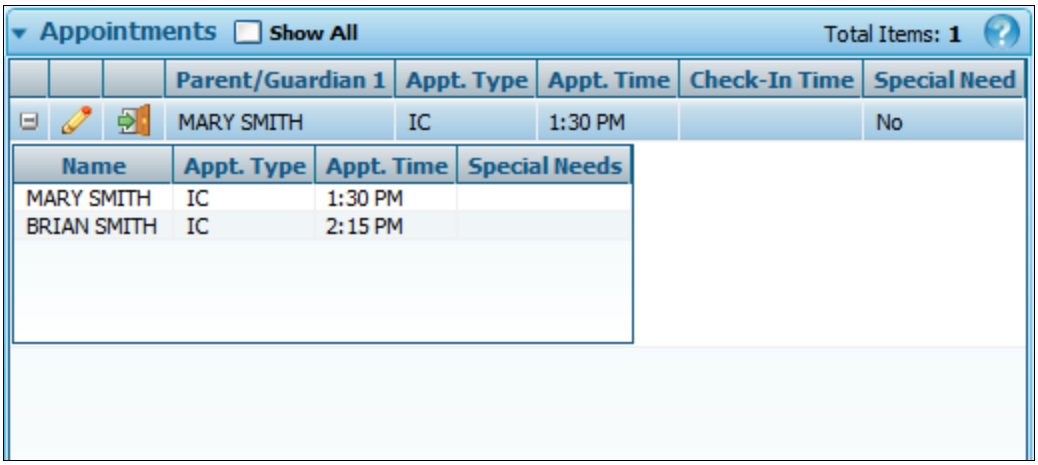




2. Click **Refresh** to update the totals under **Today's Activity**.
3. Check the **Show All** box as needed to display appointments.

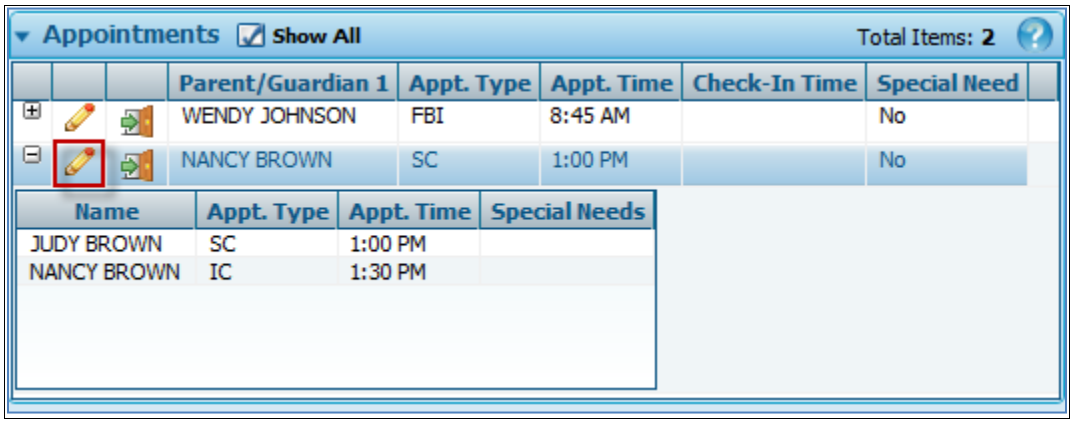


4. Under **Appointments**, click the plus sign (⊞) to display appointment details for each listed family record.



The Appointments grid displays the Parent/Guardian name, Appointment Type, Appointment Time, Check-In-Time, and an indication of whether a family member has Special Needs.

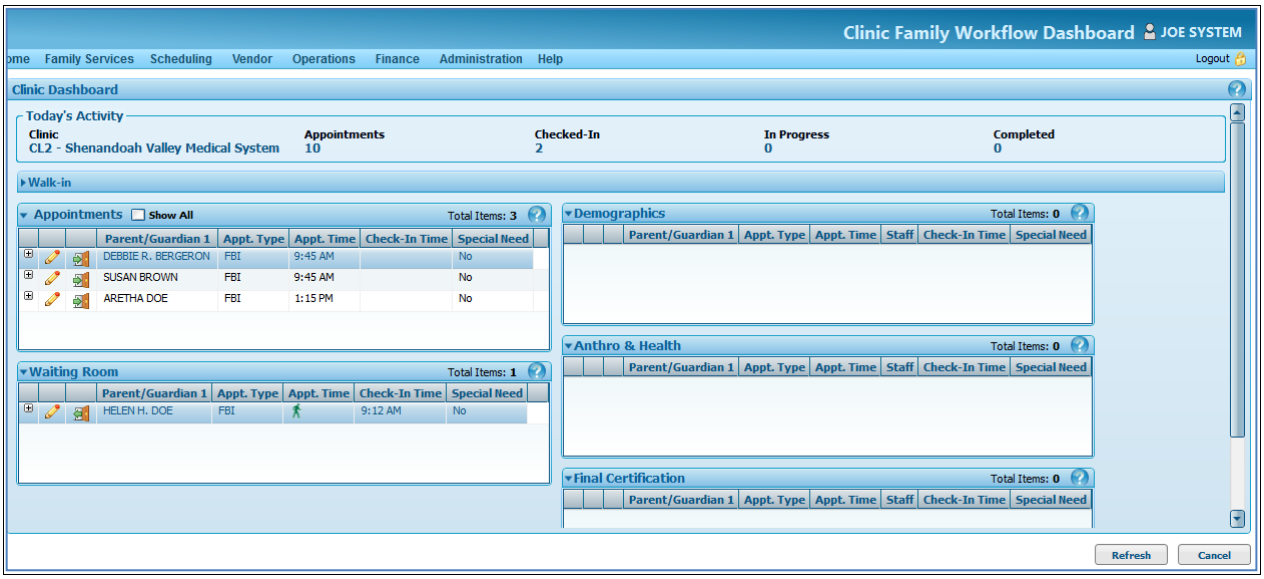
5. Click the **Edit** button ( ) to work with a family record. The **Family Demographics** screen displays.



Task B. Checking-In Families for Appointments

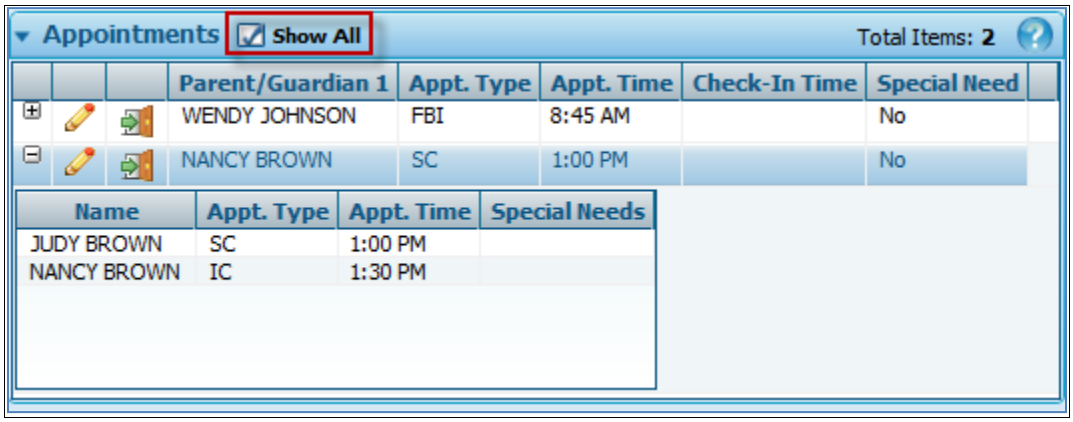
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Family Services → Clinic Family Workflow Dashboard**. The **Clinic Family Workflow Dashboard** screen displays.

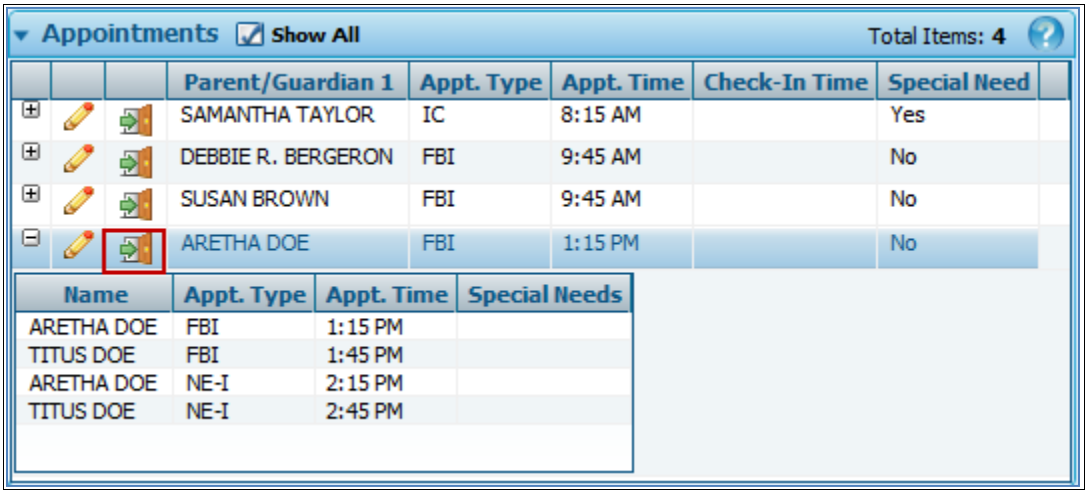


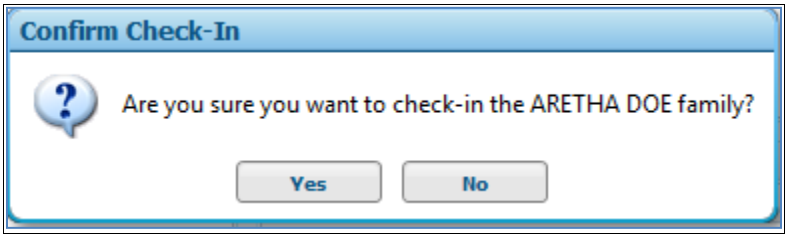
The clinic's appointments for today are summarized under Today's Activity. This summary includes the total number of Appointments, the total number currently Checked-In, the total number currently In Progress, and the total number of appointments Completed.

2. Check the **Show All** box as needed to display appointments.

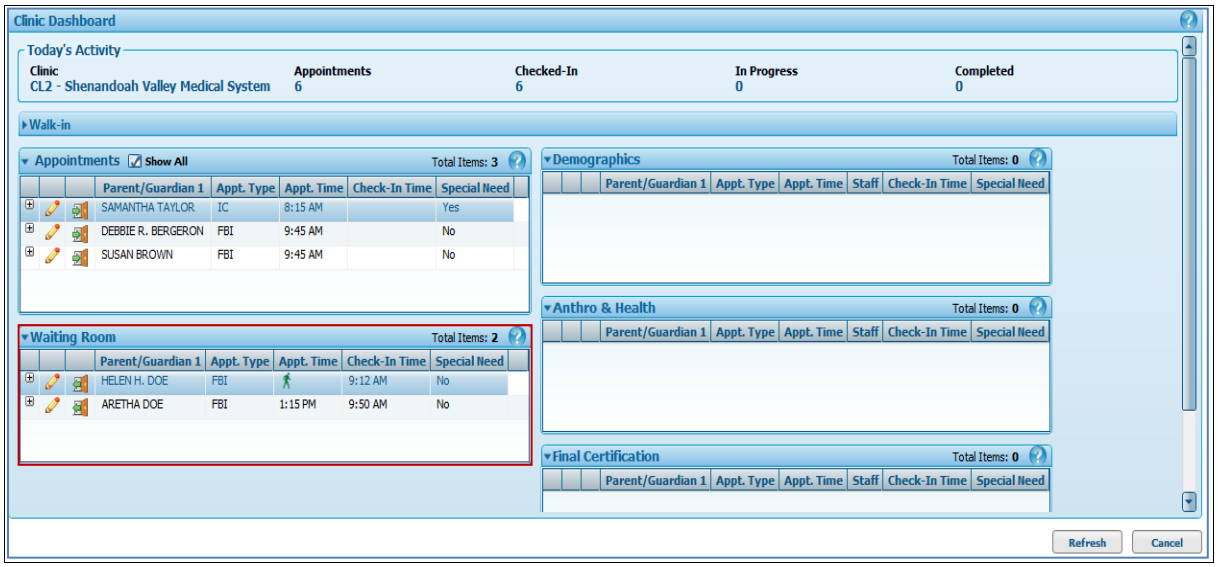


3. Click the green arrow icon to check-in a family. The **Confirm Check-In** screen displays.





4. Click **Yes**. The family will be added to the appropriate clinic-configured service room on the **Clinic Family Workflow Dashboard** screen. As in this scenario, the Doe family has been checked in and moved to the next clinic-configured service room.

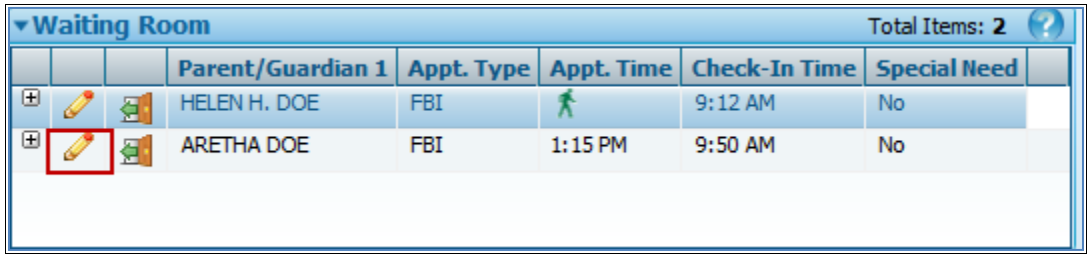


Appointments that are checked-in are organized into the clinic-configured service rooms. For details, refer to the Maintaining Clinic Rooms and Correlating Clinic Rooms to Navigation

scenarios.

The clinic-configured service room grids display the Parent/Guardian name, Appointment Type, Appointment Time, Check-In Time, and an indication of whether a family member has Special Needs.

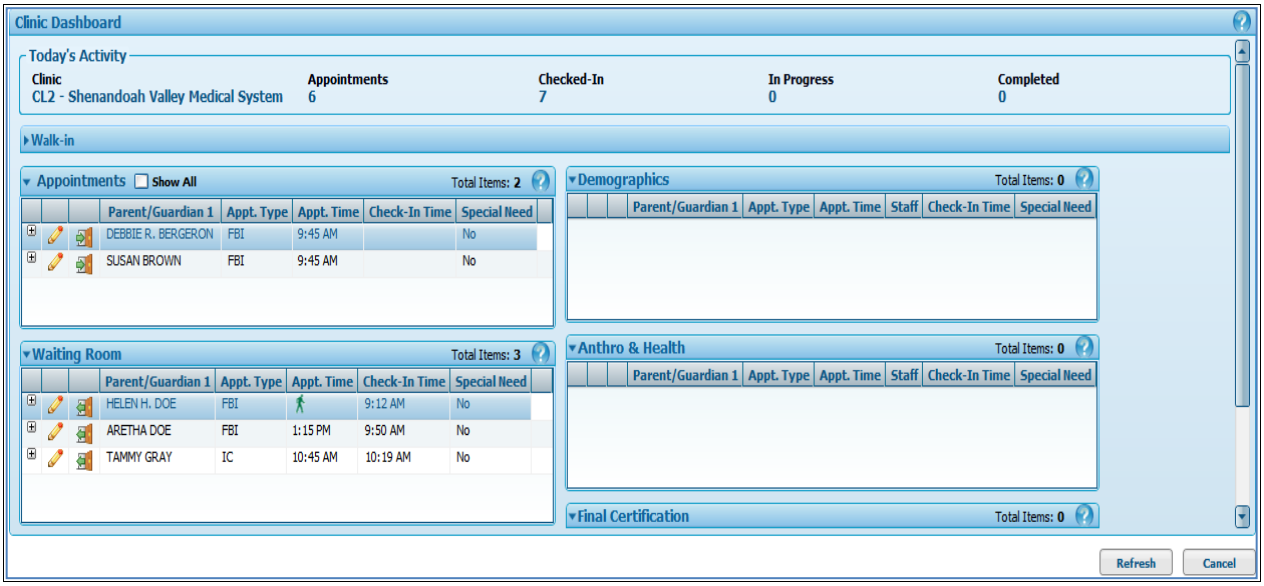
5. Click the **Edit** button ( ) to work with a family record. The screen that displays coincides with the appointment type.



Task C. Working with In-Progress Appointments

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Family Services → Clinic Family Workflow Dashboard**. The **Clinic Family Workflow Dashboard** screen displays. The system will automatically transfer the participant to the next appropriate location once the tasks are completed in the previous locations.

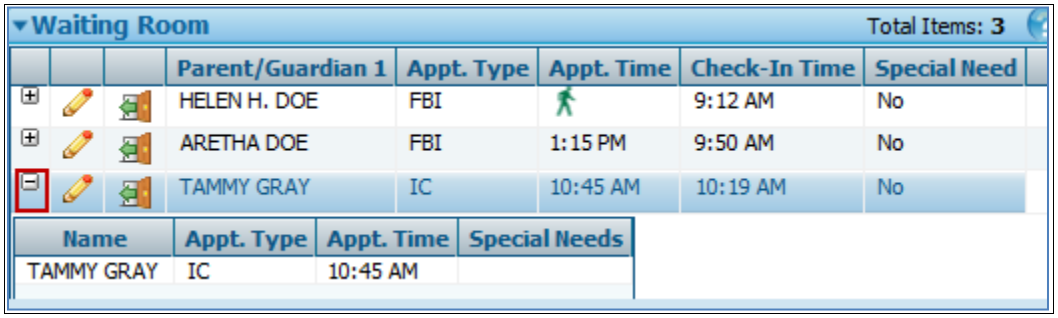


The clinic's appointments for today are summarized under Today's Activity. The summary includes the total number of Appointments, the total number currently Checked-In, the total number currently In Progress and the total number of appointments completed.

Appointments that are checked-in and currently in-progress are organized into the clinic-configured service rooms. For details, refer to the Maintaining Clinic Rooms and Correlating Clinic Rooms to Navigation scenarios.

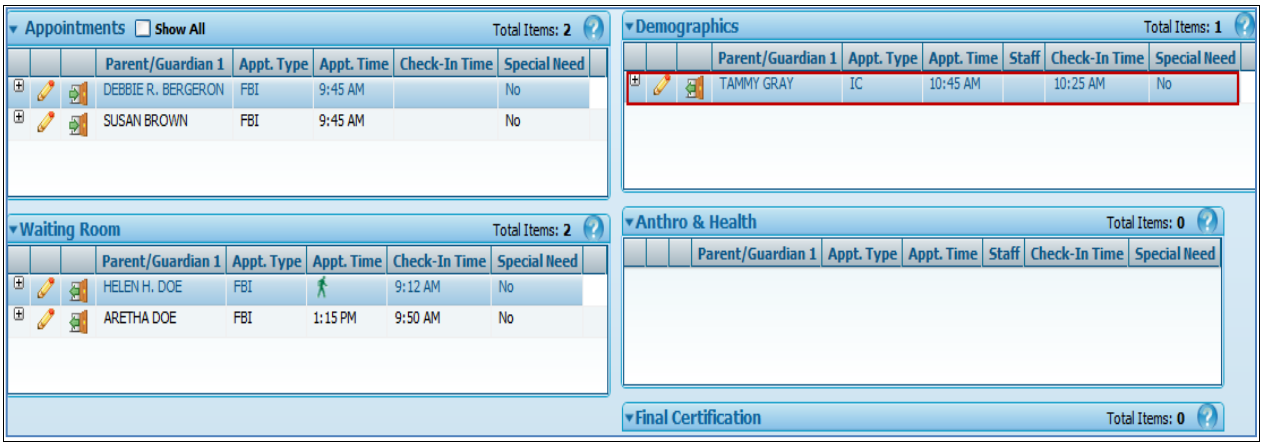
The clinic-configured service room grids display the Parent/Guardian name, Appointment Type, Appointment Time, Staff, Check-In Time, and an indication of whether a family member has Special Needs.

2. Under the service rooms, click the plus sign (⊞) to display appointment details for each listed family record.



The service room Grid displays the Parent/Guardian name, Appointment Type, Appointment Time, Staff, Check-In-Time, and an indication of whether a family member has Special Needs.

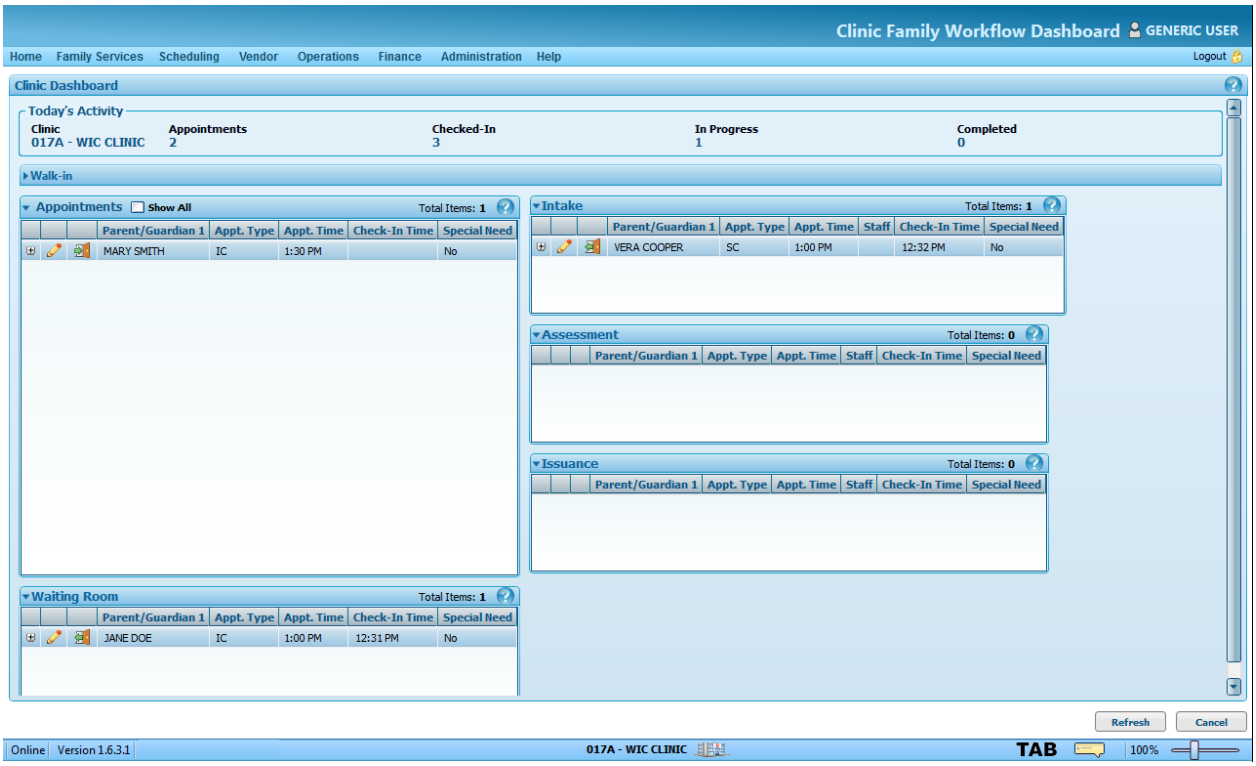
3. Click the **Edit** button ( ) to work with a family record. The appropriate screen in the certification process displays, depending on current progress.



Task D. Creating Walk-in Appointments

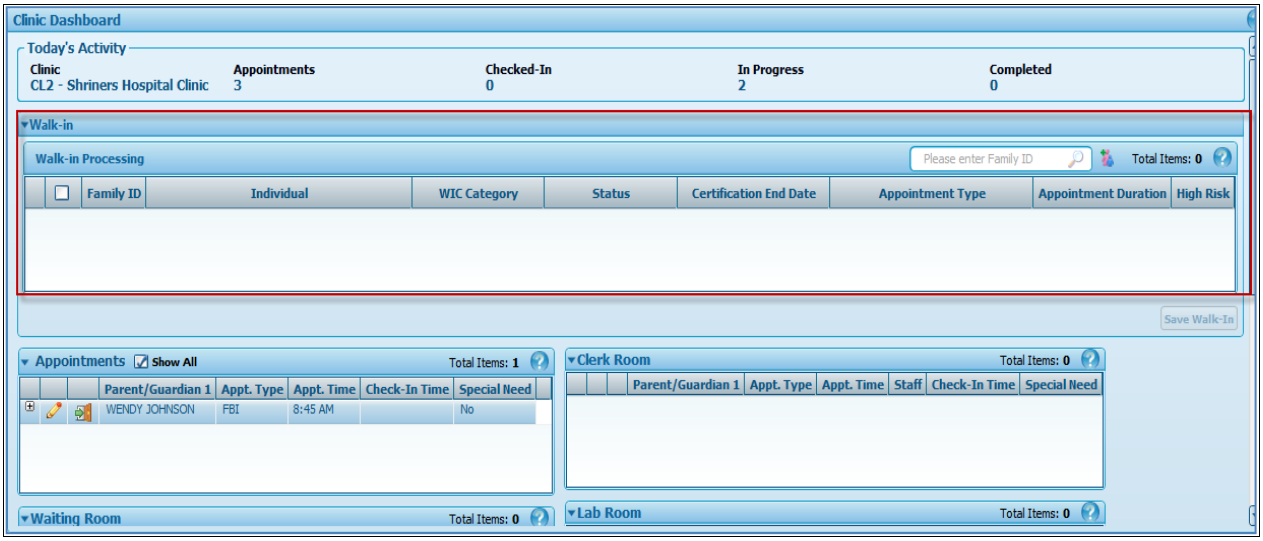
Complete the following steps to perform this task:

1. From the **Home** screen, go to **Family Services → Clinic Family Workflow Dashboard**. The **Clinic Family Workflow Dashboard** screen displays.



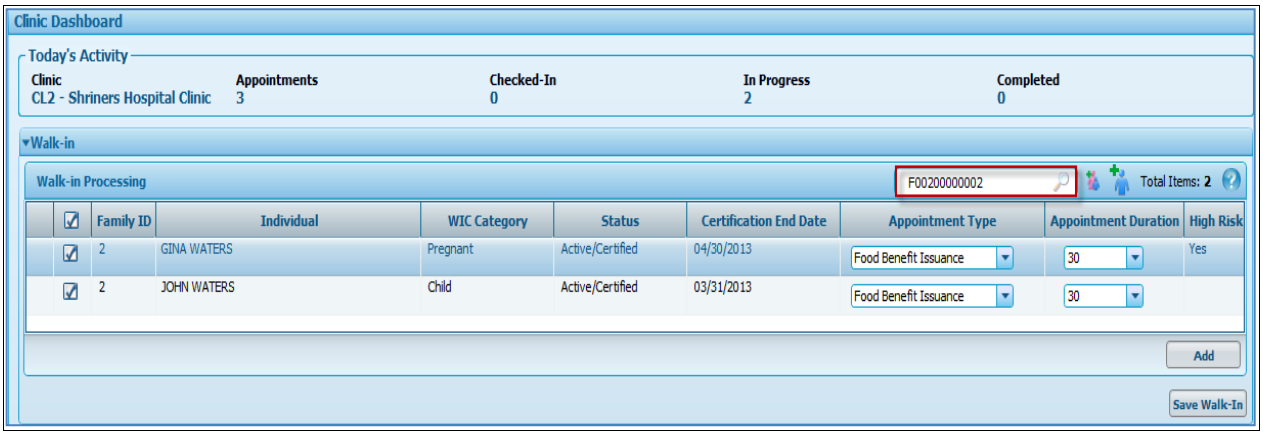
The clinic's appointments for today are summarized under Today's Activity. The summary includes the Clinic, total number of Appointments, total number currently Checked-In, total number currently In Progress, and the total number of appointments completed.

2. Click the expand/collapse arrow beside **Walk-In**. The screen expands and displays the **Walk-in Processing** grid.



3. Enter a **Family ID** in the search field.

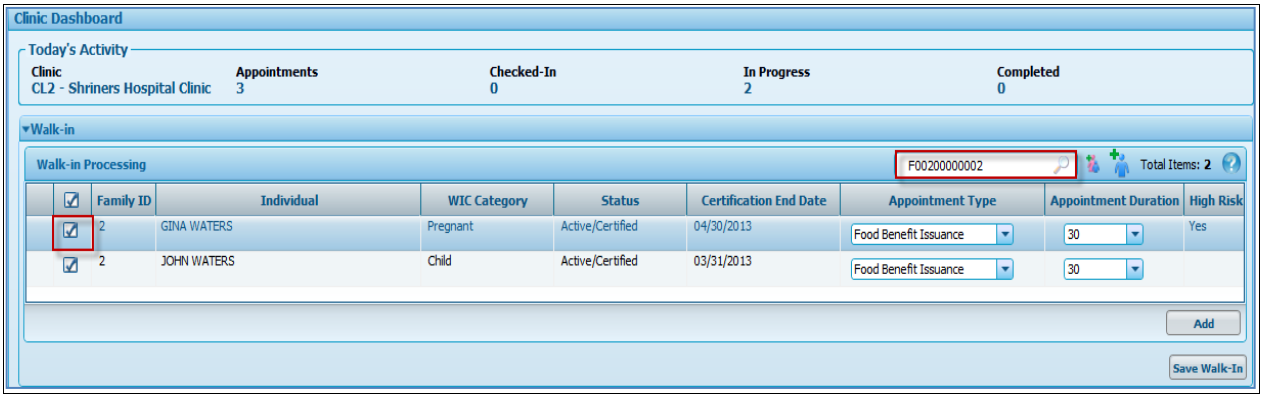
4. Click the **Search** button ( ) to search for family records. The **Walk-in Processing** grid refreshes and displays results matching your search.



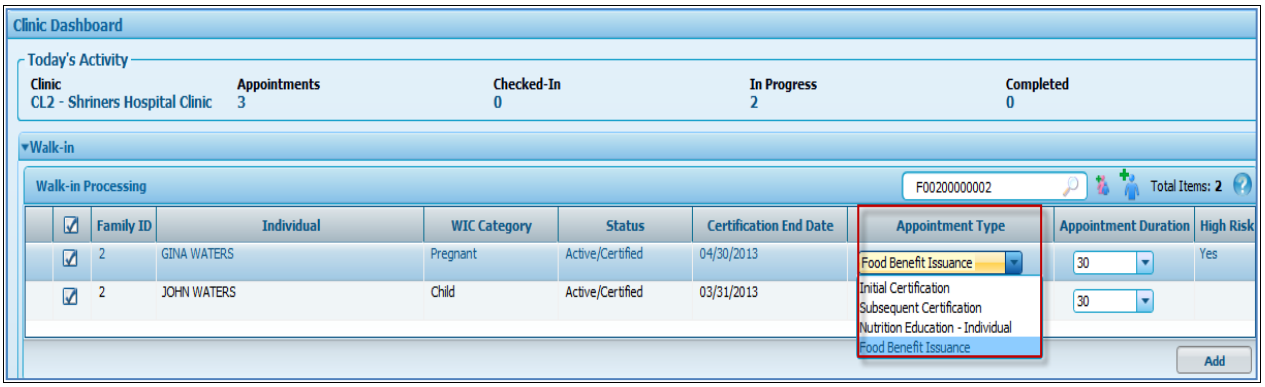
The Walk-in Processing grid includes the Family ID, Individual name, WIC Category, Status, Certification End Date, Appointment Type, Appointment Duration, and High Risk indicator for all records matching your search criteria.

To create a new family, click the Create New Family icon . The New Family screen displays. For details on using this screen, refer to the Adding a New Family Record – Family Section scenario. To add a new participant to a family record, click the Add New participant icon . The Add Participant screen displays. For details on using this screen, refer to the Adding a New Family Record – Participant Section scenario.

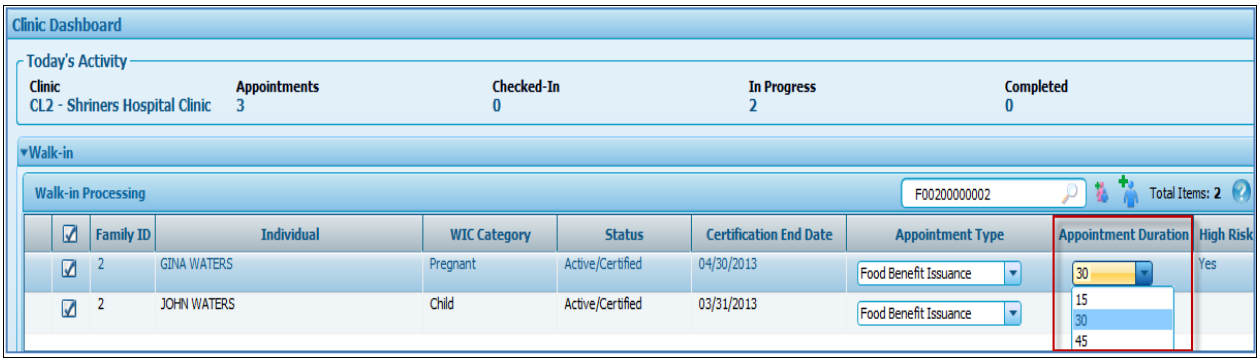
5. Check the boxes for all family members present for the walk-in appointment.



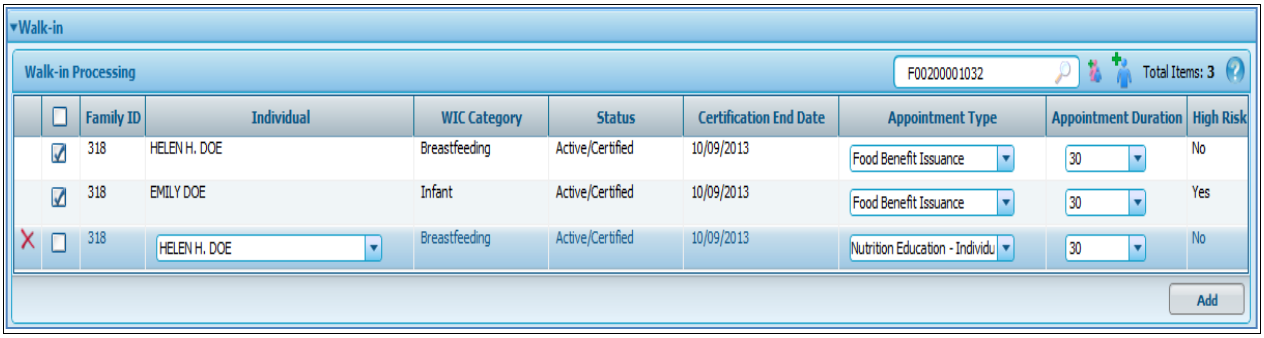
6. Select the **Appointment Type** for each family member.



7. Select the **Appointment Duration** for each family member.

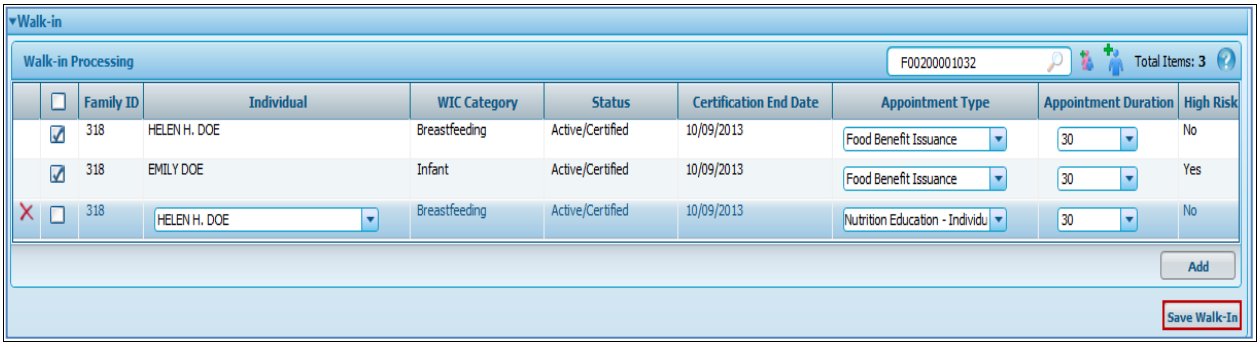


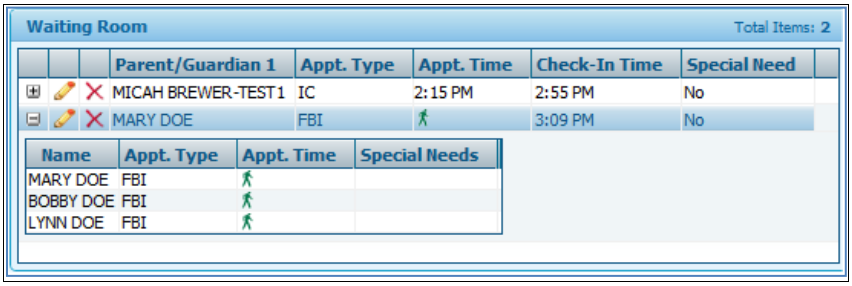
8. Add additional appointments for one or more family members as follows:
   - Click **Add**. A new row will be added to the grid.



   - Check the box as needed.
   - Select the **Individual** family member.
   - Select the **Appointment Type**.
   - Select the **Appointment Duration**.

9. Click **Save Walk-In**. The family will be added to the appropriate clinic-configured service room on the **Clinic Family Workflow Dashboard** screen.





Congratulations!

You have successfully completed the **Clinic Family Workflow Dashboard** process.

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14- DELAYED SIGNATURES FOR FI ISSUANCE

Delayed Signatures for FI Issuance

The **Delayed Signatures for FI Issuance** screen is used to display a list of food instruments with a delayed signature. The user can select an entry to capture the signature for the receipt of the food instruments. This scenario describes how to capture the signature acknowledgement of food instruments previously deferred. In addition, the user can void food instruments with signature deferred previously.

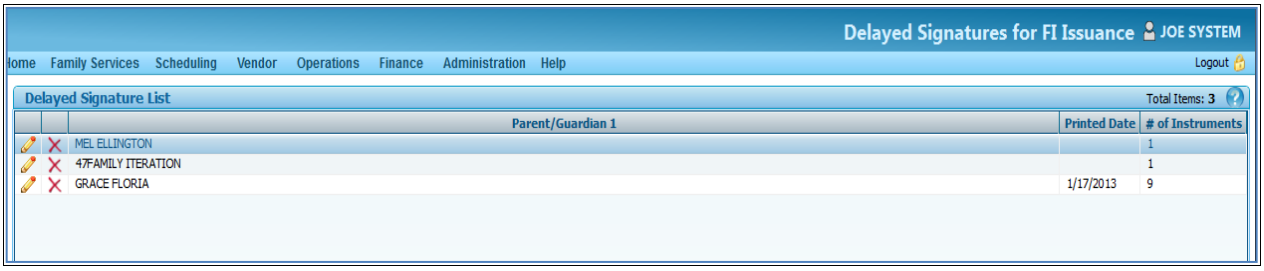
This process includes the following task(s):

Task A. Capture Delayed Signature for FI Issuance 14-2
Task B. Void Food Instruments with Signature Previously Delayed 14-3

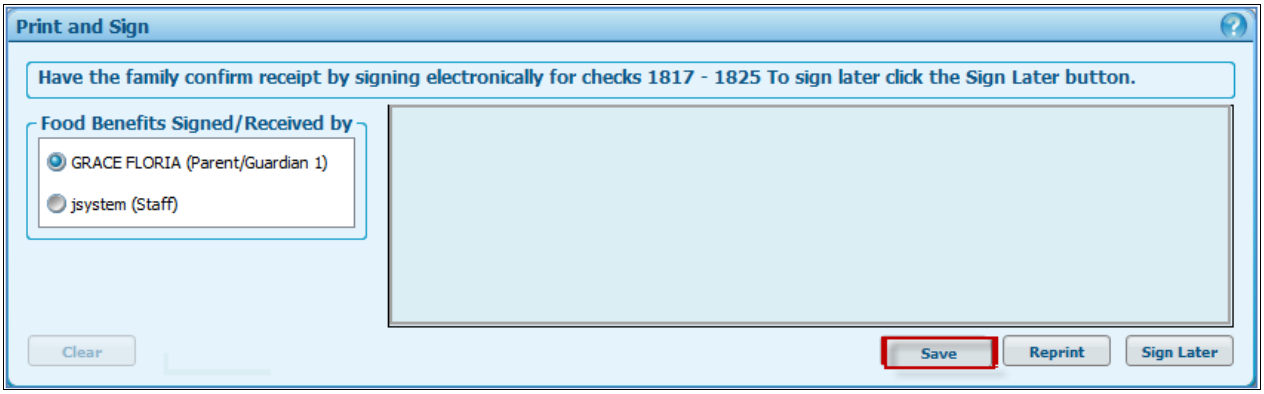
Task A. Capture Delayed Signature for FI Issuance

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Family Services → Delayed Signature for FI Issuance**. The **Delayed Signature for FI Issuance** screen displays.



2. Click the **Edit** button ( ) next to the desired family from the list of delayed signatures. The **Sign and Print** window displays.

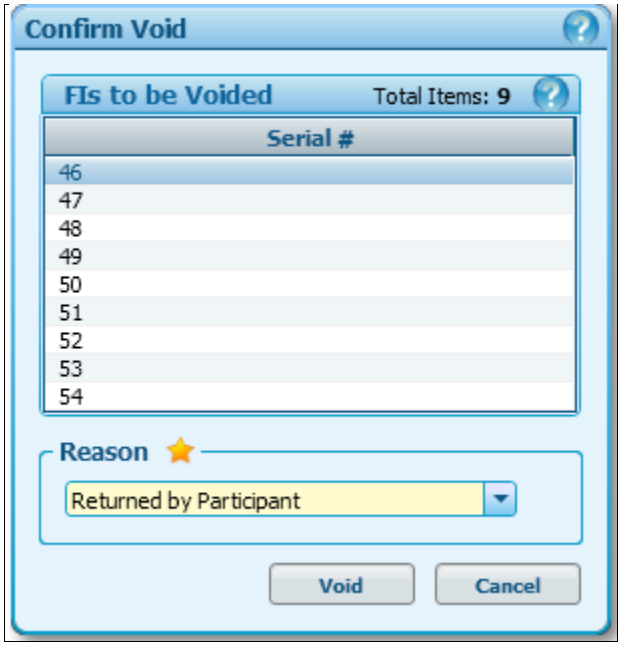


3. Capture the signature and click **Save**. The food instruments are printed and the family is removed from the delayed signature list.

Task B. Void Food Instruments with Signature Previously Delayed

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Food Maintenance → Delayed Signature for FI Issuance**. The **Delayed Signature for FI Issuance** screen displays.
2. To void food instruments for a family click the **Void Instruments** icon. The **Confirm Void** window displays.



3. Select the void reason and click **Void**. A status message indicates the instruments were voided.

Congratulations!

You have successfully completed the **Delayed Signatures for FI Issuance** process.

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15- REPORTING DEATH IN FAMILY

Reporting Death in Family

The following scenario describes the process of reporting a death in the family.

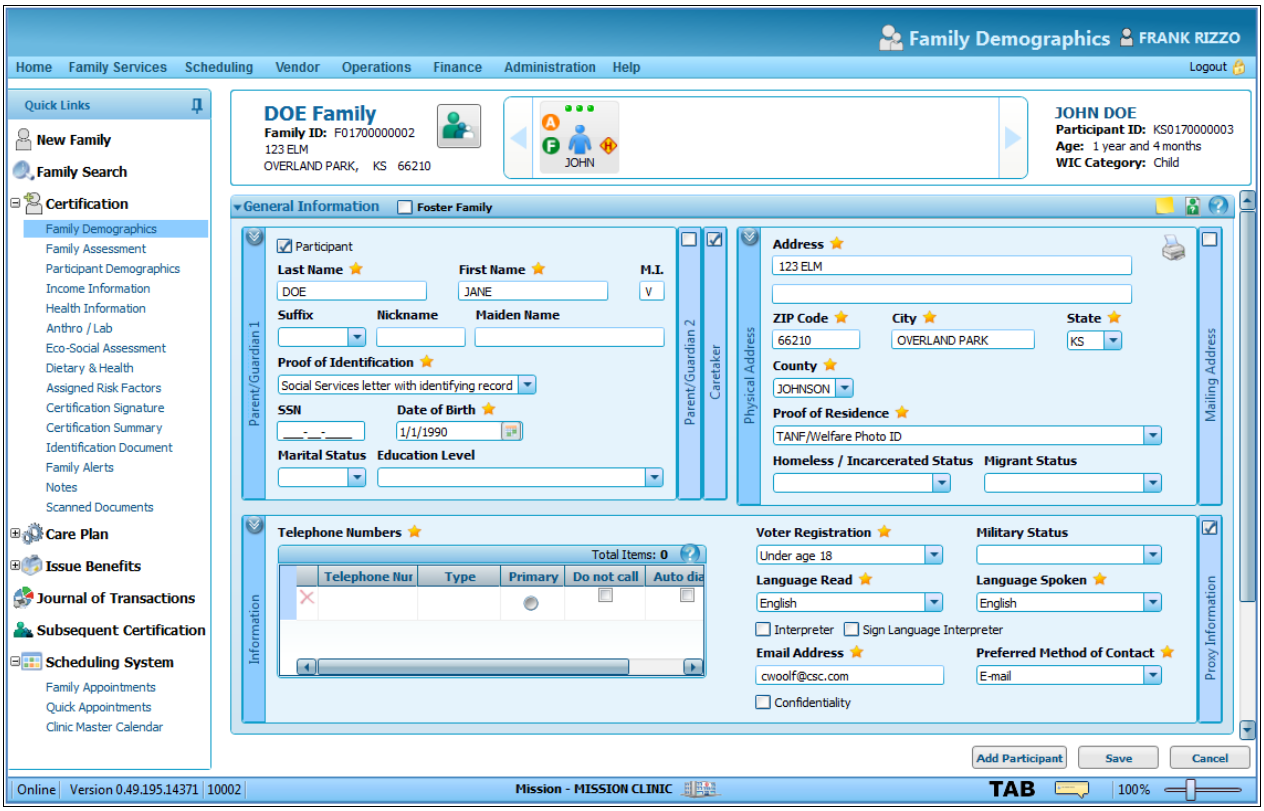
This process includes the following task(s):

Task A. Reporting a Death in the Family 15-2

Task A. Reporting a Death in the Family

Complete the following steps to perform this task:

1. Search for and access a family record.



2. Go to **Family Services → Reporting Death In Family**. The **Reporting Death In Family** screen displays.

The Family Members grid lists the Last Name, First Name, M.I., Suffix, Date of Birth, Gender, WIC Category, and Foster Care Entry Date for all family members.

Click a column header to sort the records in the grid. Drag and drop columns of information to

reorganize the order of the columns in the grid.

3. Click the check box beside any deceased family member.
4. Enter the **Deceased Date**.

5. Click **Save**. The deceased family member's age will be changed to "Deceased" Ⓓ in the family header.

Congratulations!

You have successfully completed the **Reporting Death in Family** process.

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16- SUBSEQUENT CERTIFICATION

Subsequent Certification of a Breastfeeding Woman and an Initial Certification of Her Infant

The **Subsequent Certification** screen displays all individuals in the family that are already in the system and meet the requirements to reapply for certification. This would apply to an applicant that was previously eligible, a participant near the end of the certification period or a category change for a woman participant. For this scenario, you have certified a pregnant woman creating a family record in the system. The family member displays as an icon at the top of the screen within the family header.

For training purposes, her next WIC visit is as a postpartum breastfeeding woman. The breastfeeding mom will re-apply for certification, adding her infant to the family record and performing an initial certification on that infant. This task requires a number of system screens to be completed. You will need to complete several screens once for the entire family while other screens need to be completed individually for each member.

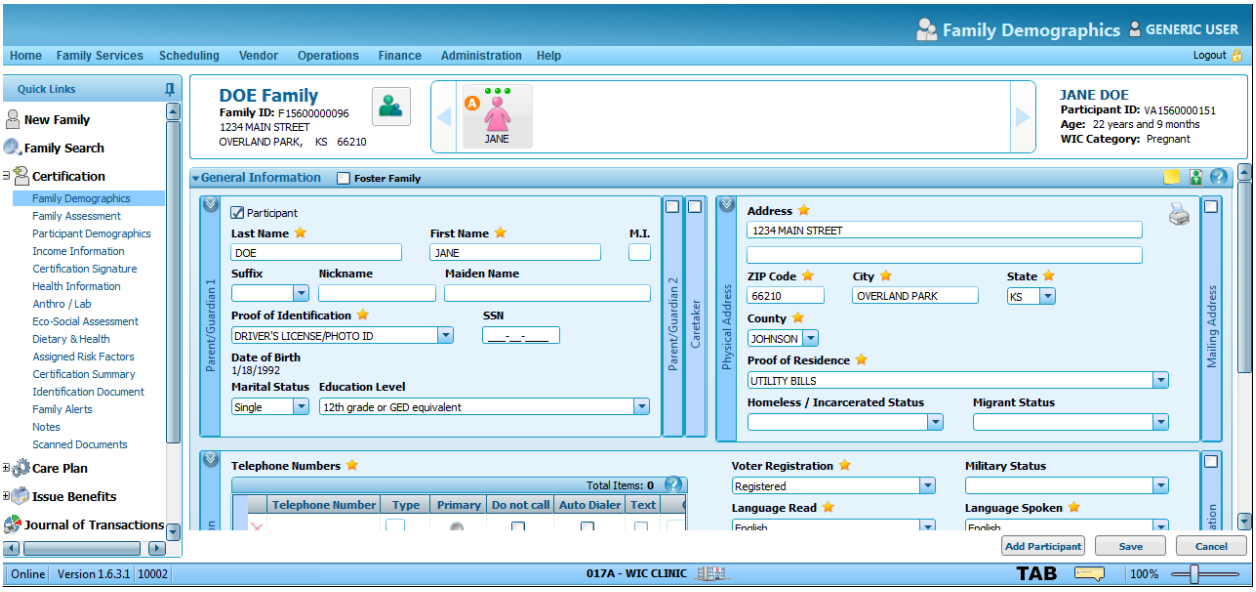
The process includes the following task(s):

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**

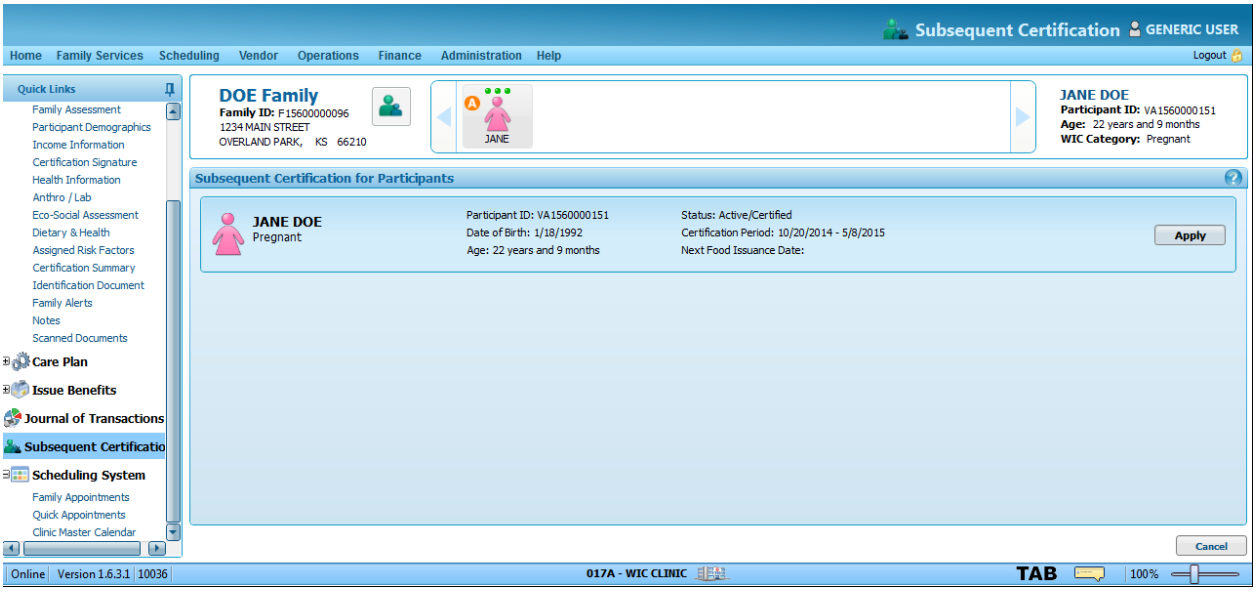
Task A. Subsequent Certification – Family Demographics Screen

Complete the following steps to perform this task:

1. Search for the family record of a pregnant woman. The participant is displayed as an icon within the family header.



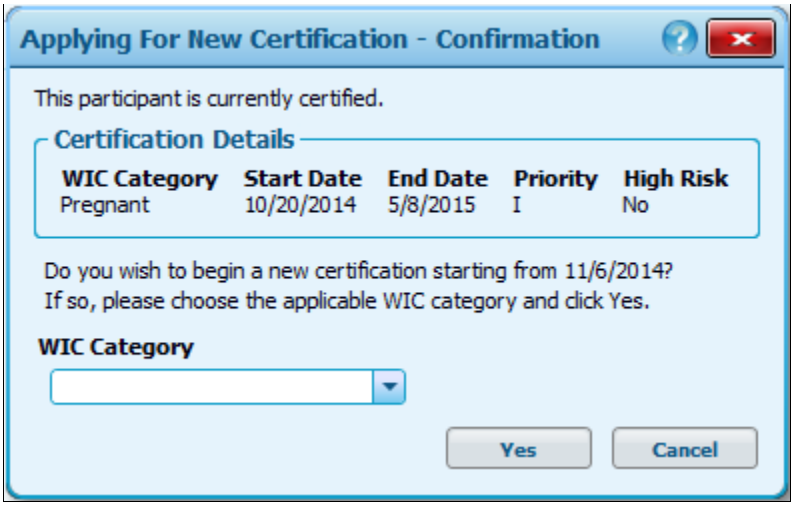
2. Select **Subsequent Certification** from **Quick Links**. The **Subsequent Certification** screen displays.



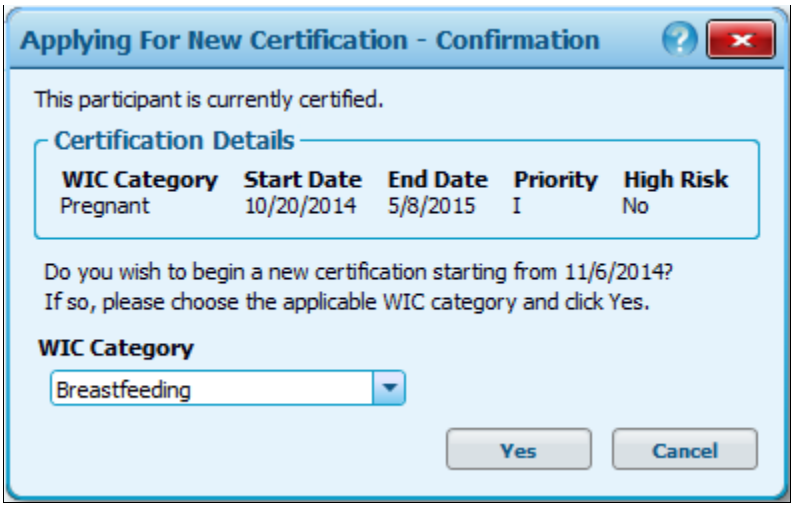
The subsequent certification screen displays all individuals in the family that meet the requirements to reapply for certification. Select the Apply button for the individual that is

reapplying for certification.

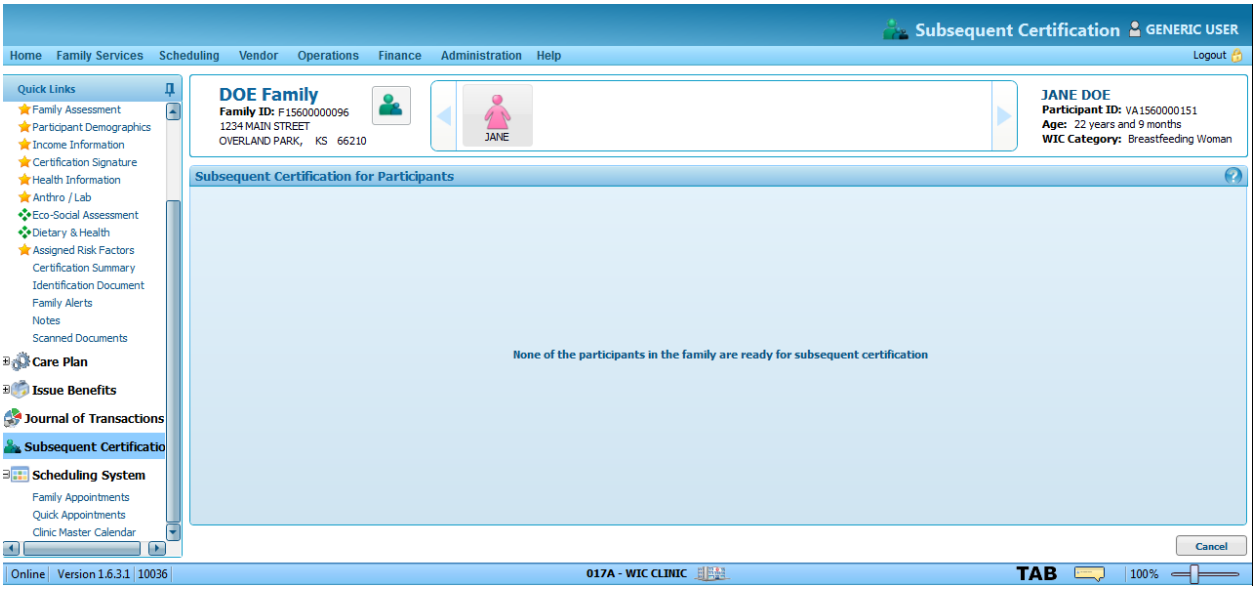
3. Select the **Apply**. The **Applying for New Certification – Confirmation** screen displays with the current certification details.



4. Select "Breastfeeding" from the **WIC Category** drop down list.



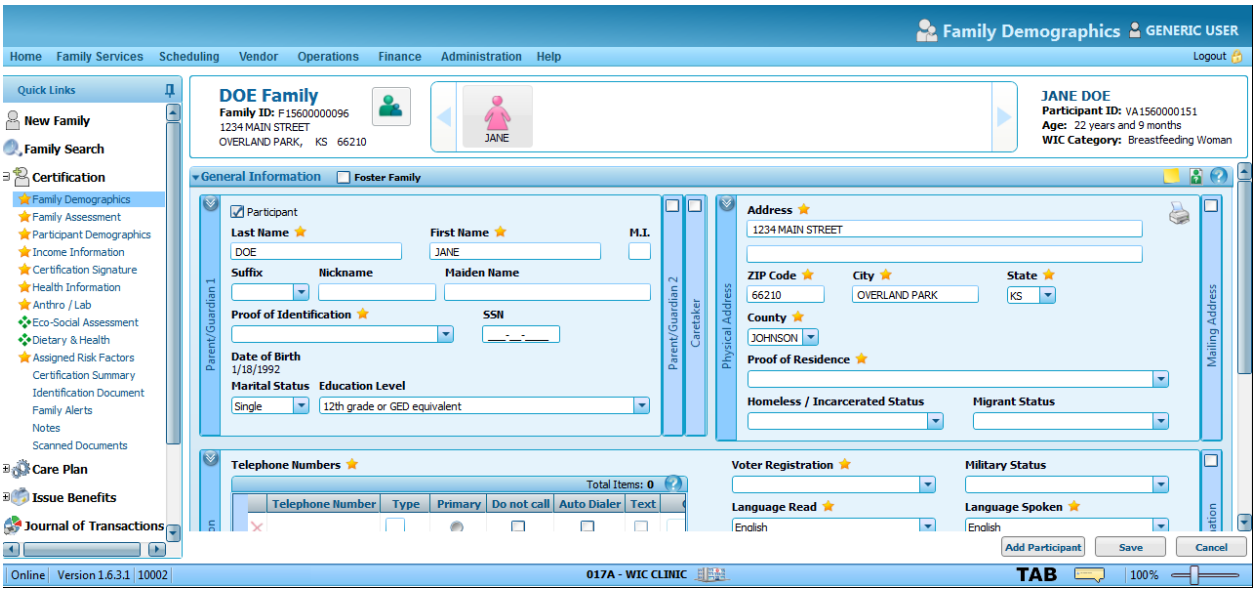
5. Click **Yes**. The screen refreshes stating that the application has been successfully created. The **Subsequent Certification** screen displays allowing other family participants to be re-certified.



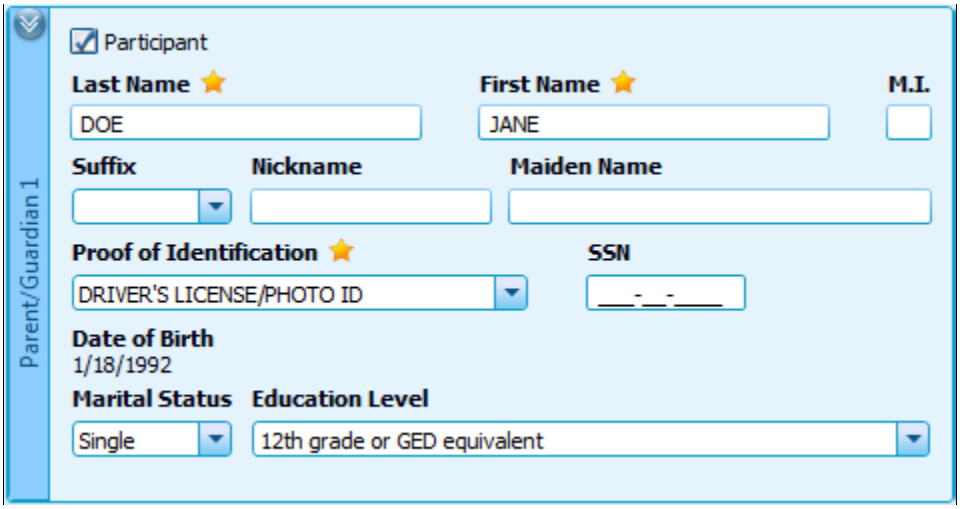
After clicking Yes, and upon returning to the Subsequent Certification screen, you may see a message stating that none of the participants in the family are ready for subsequent certification. This message displays if there are no other participants in the family that a subsequent certification can be started.

If no other participant is eligible for a subsequent certification, click Cancel and the system displays the Family Demographics screen.

6. Click **Cancel** if no other participant is eligible for a subsequent certification. The **Family Demographics** screen displays.

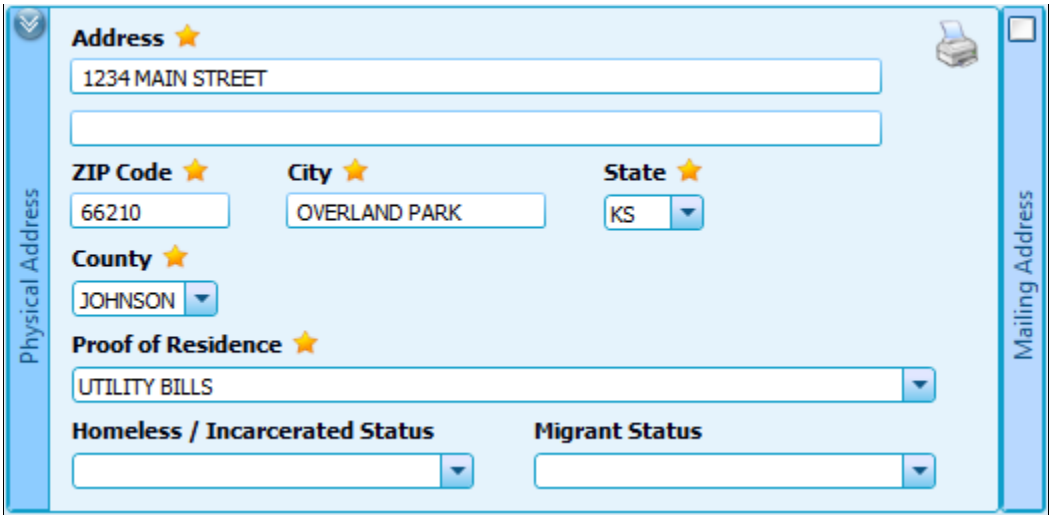


7. Under **General Information**, complete the **Parent/Guardian 1** tab including selecting an option from the **Proof of Identification** drop-down list.

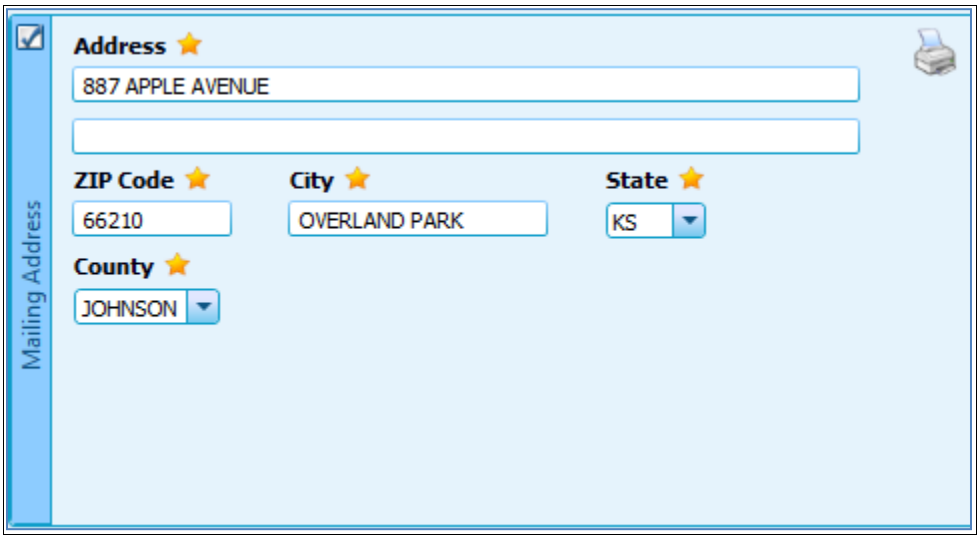


After Confirmation of the New Certification has occurred, you will be directed to the initial certification screen on Quick Links. You will either enter information on a screen or modify information, which may not be accurate.

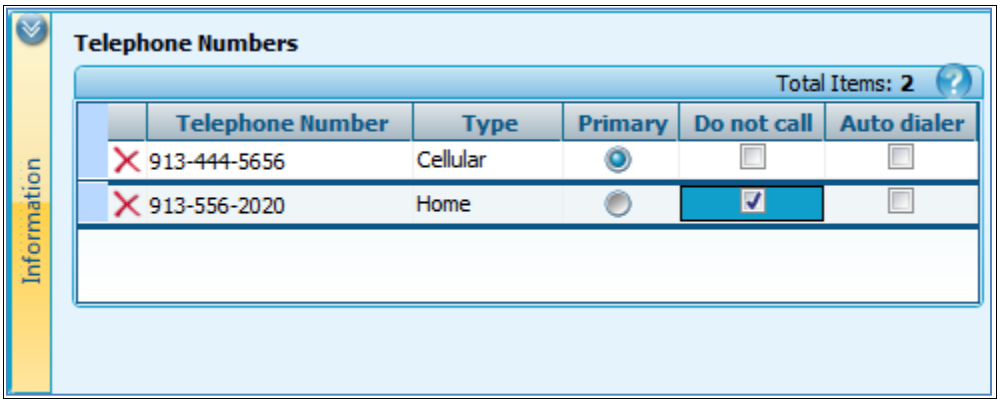
a. Under **General Information**, complete the **Physical Address** section.

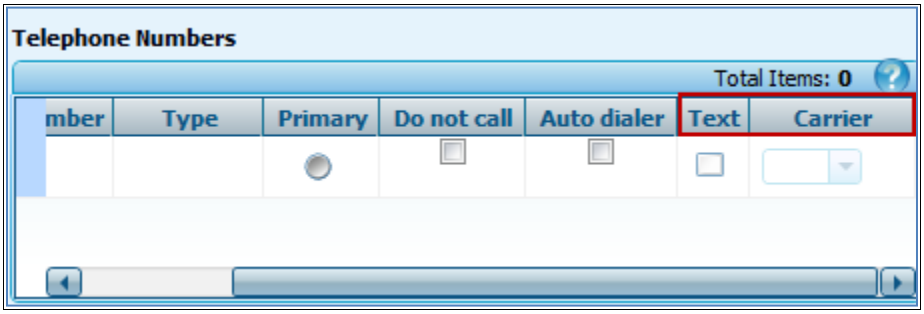


b. Under **General Information**, complete the **Mailing Address** section by clicking the check box if mailing address is different from physical address.



c. Under **General Information**, complete the **Information** section adding as many phone 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. (This is not

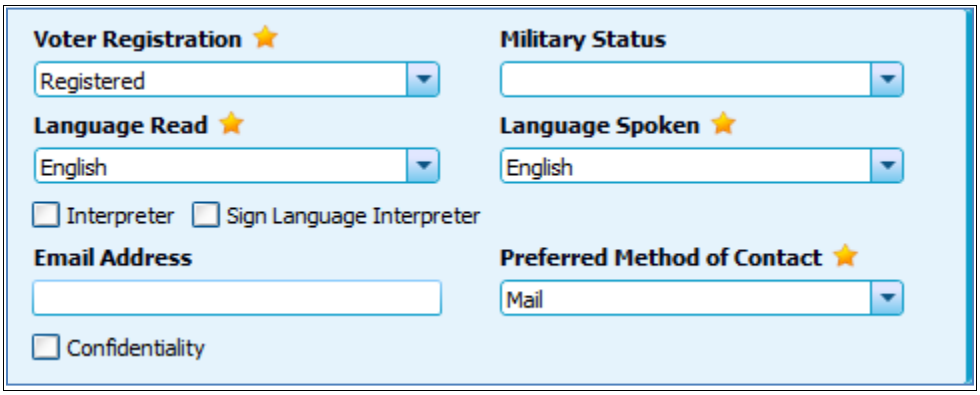
an option for all states.)

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

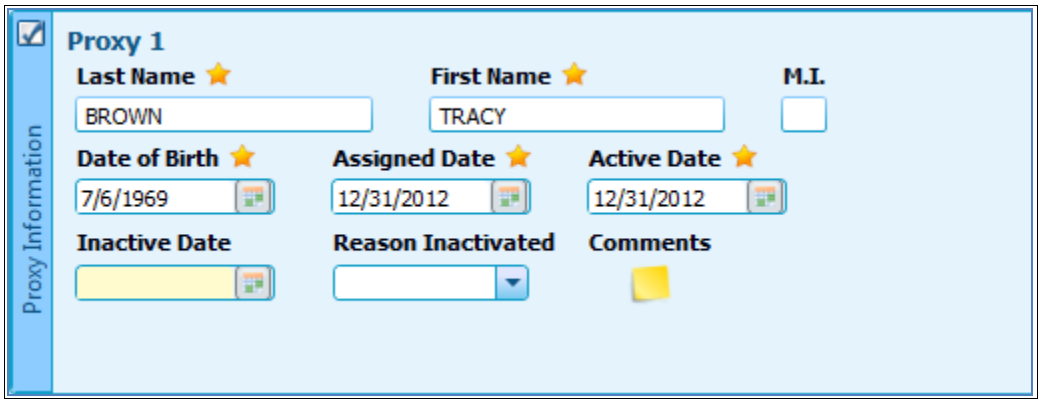
Check Test if the applicant is interested in receiving text messages at the associated number.

If the associated number is a Cellular number, you have the option of selecting a Carrier.

d. Continue completing the **Information** section.

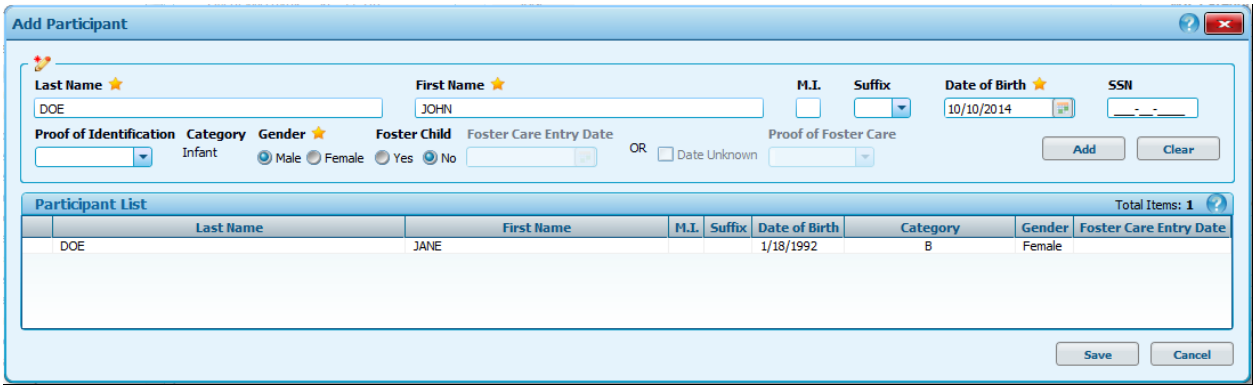


e. Under the **Information** section, complete the **Proxy Information** section by clicking the check box.

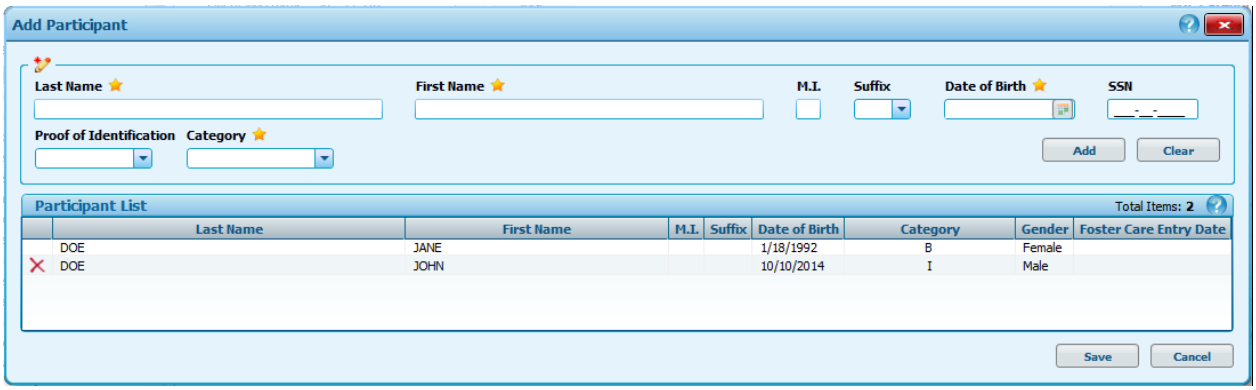


8. Click **Add Participant** to add the infant to the family record for certification.

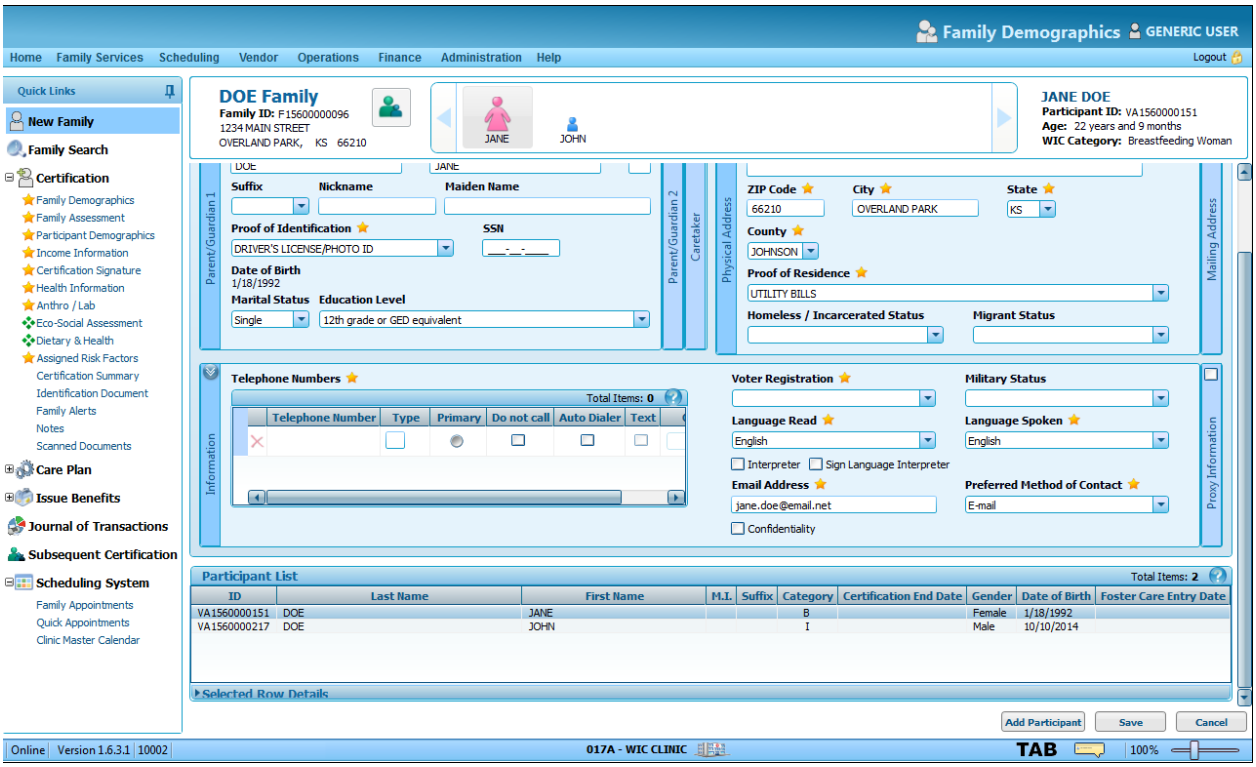
Multi-colored symbols display on a family member's icon when changes are made to the screen. You may make multiple changes on a screen before clicking Save. Once changes are saved, the symbol is cleared from the member icon.



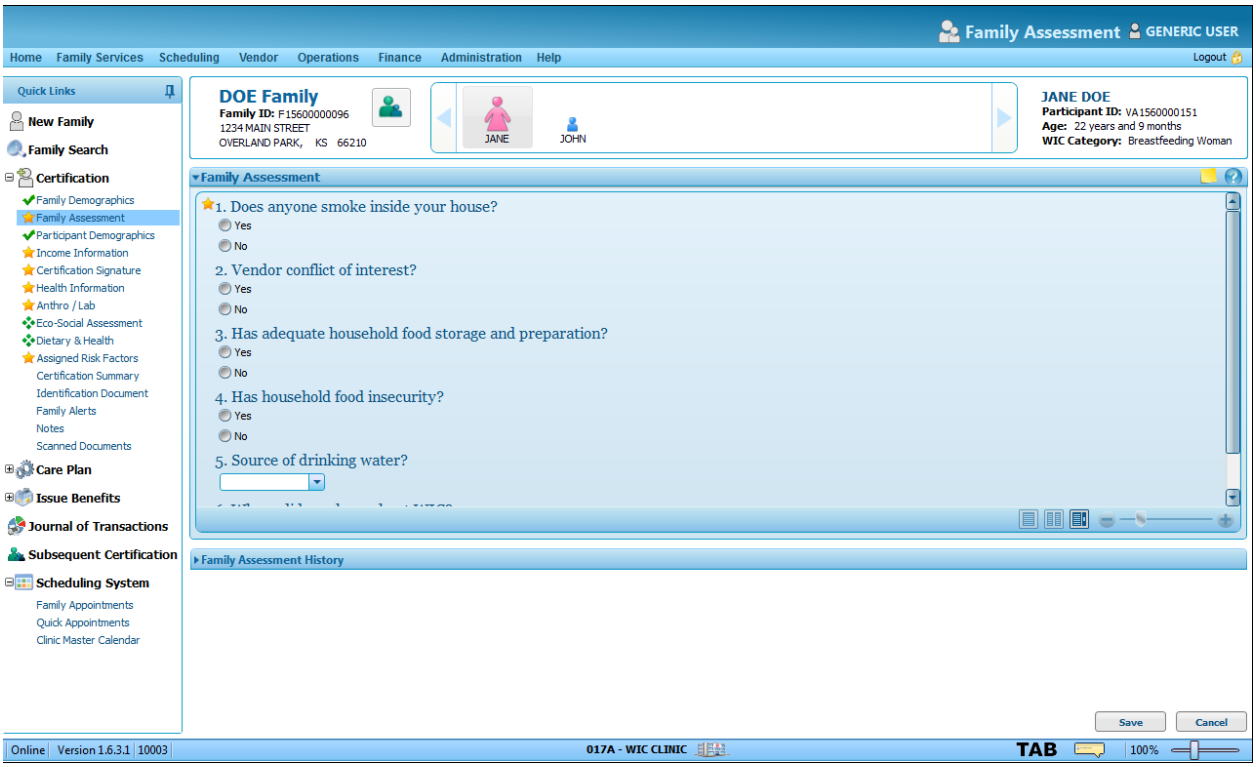
9. Click **Add**. The infant participant displays on the **Participant List** grid.



10. Click **Save** on the **Add Participant** screen. You are returned to the **Family Demographics** screen and the newly added infant is displayed in the **Family Header**.



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



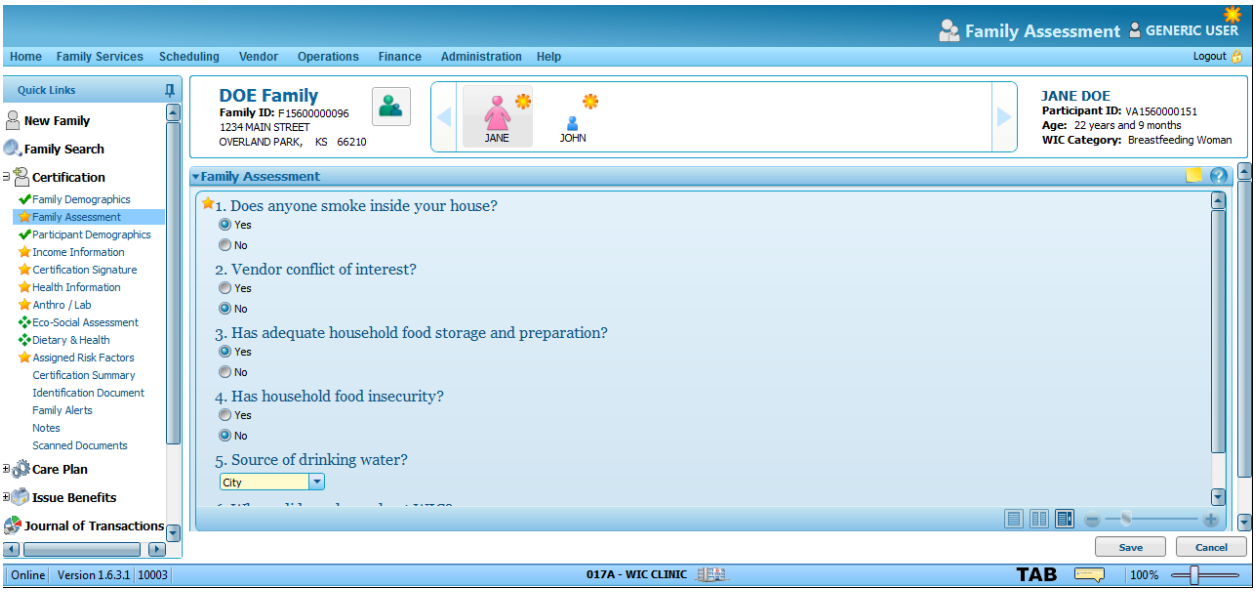
A green Checkmark icon (✔) displays on the Quick Links menu indicating the screen has been completed.

Task B. Subsequent Certification – Family Assessment Screen

Complete the following steps to perform this task:

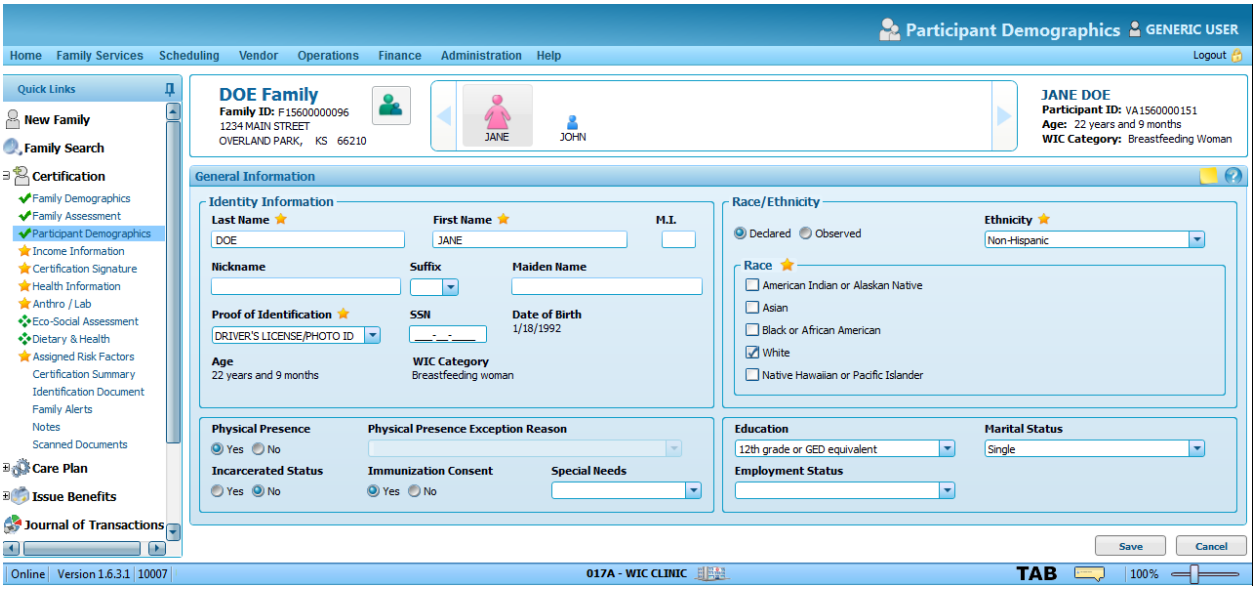
1. Complete the **Family Assessment** screen by doing the following:

   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 and you are navigated to the next screen in the process.



Task C. Subsequent Certification – Participant Demographics Screen

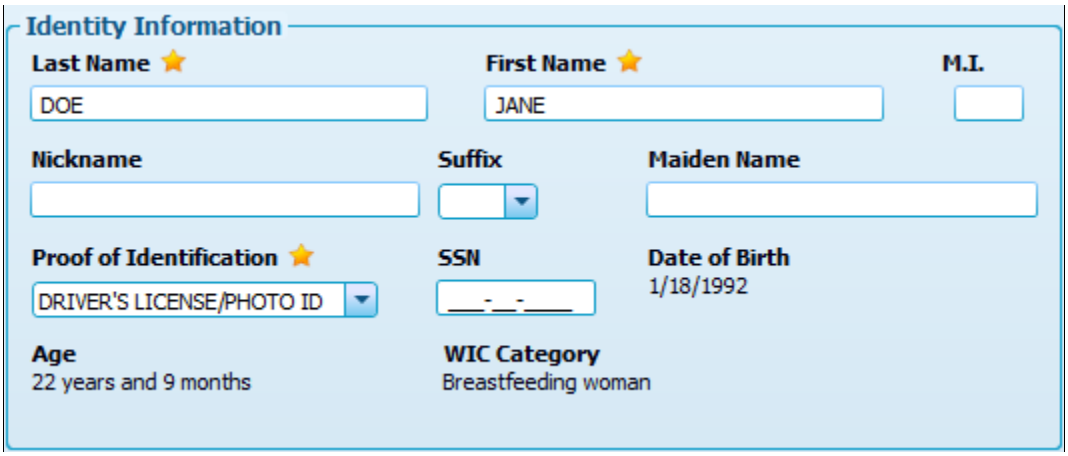
The **Participant Demographics** screen must be completed separately for each family member. Simply select the desired family member icon within the family header to display the screen for the selected member.

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 infant. Outside of formal training, choose the order that works best for you.

Complete the following steps to perform this task:

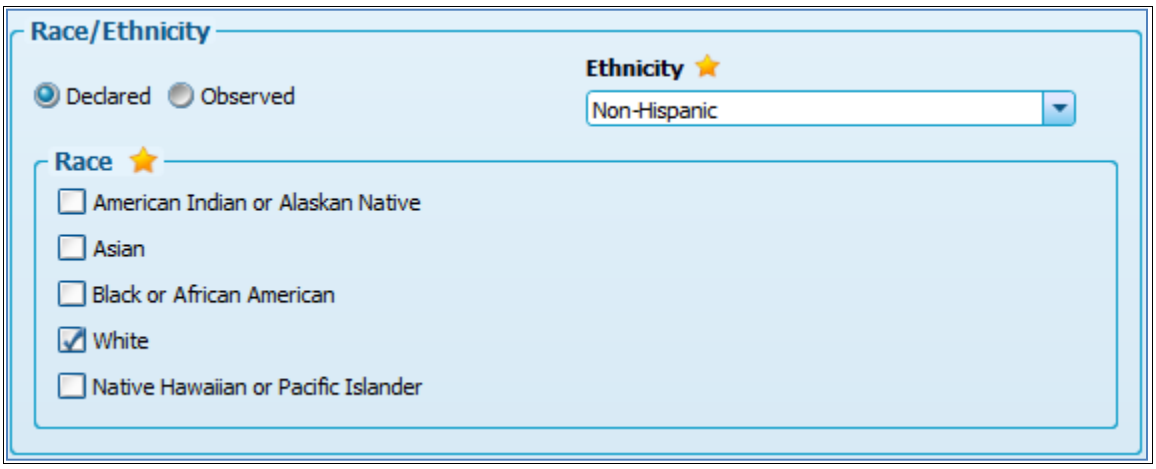
1. Complete the **Participant Demographics** screen for the woman by doing the following:

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

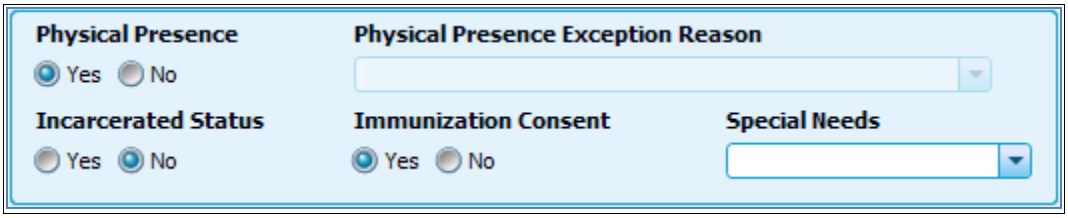


For training purposes, ensure a WIC Category of Breastfeeding is selected for the woman.

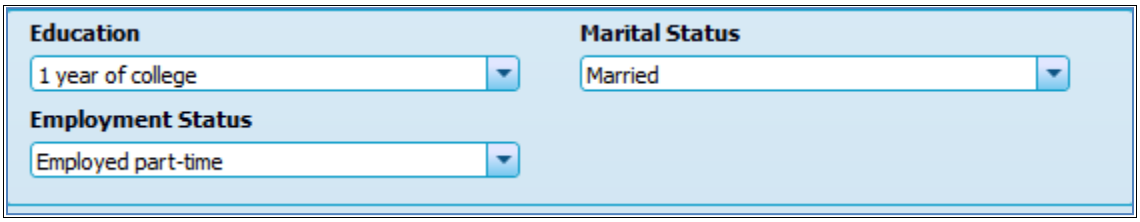
   b. Complete the **Race/Ethnicity** section.



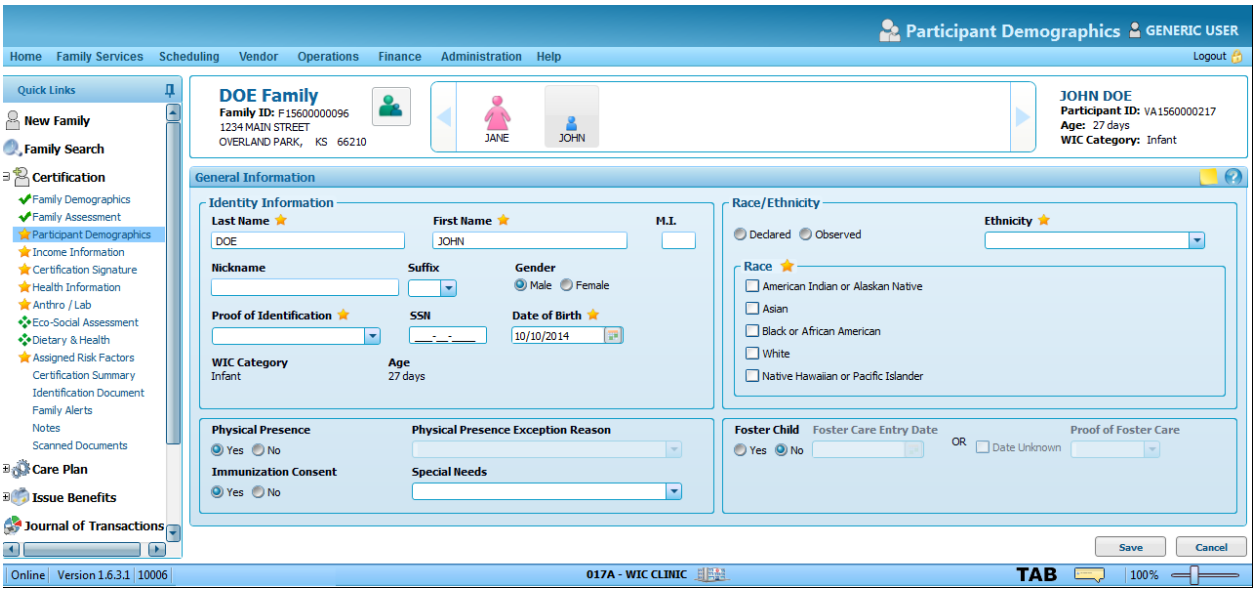
c. Complete the group box shown below.



d. Complete the group box shown below.

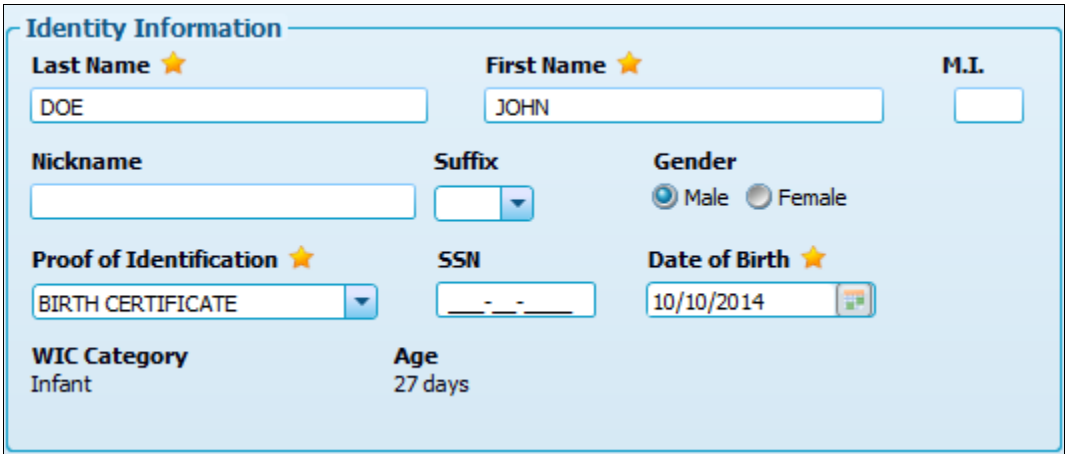


2. Select the infant member icon in the Family Header. The screen is refreshed and displays information associated to the infant.



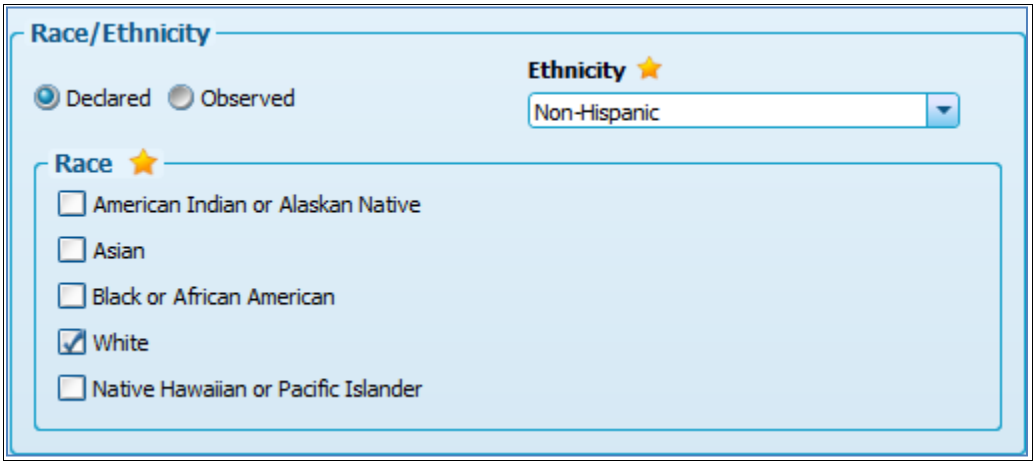
3. Complete the **Participant Demographics** screen for the infant by doing the following:

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

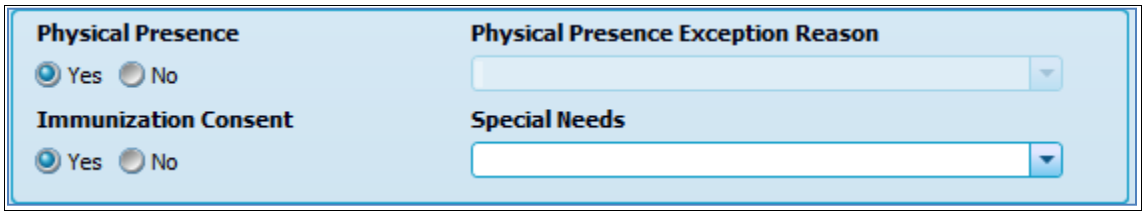


The system automatically assigns a WIC Category of Infant to the infant member based on the user entered Date of Birth value. If a different WIC Category is needed, the member's Date of Birth must be modified.

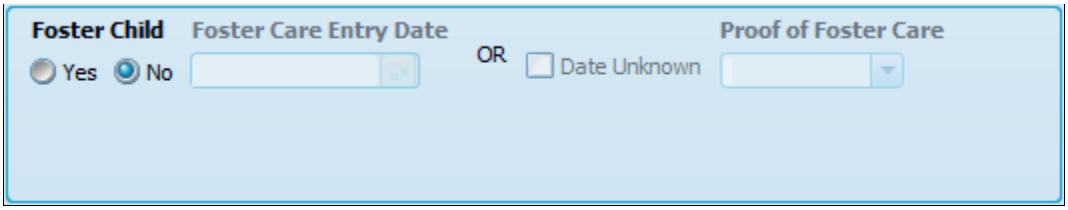
   b. Complete the **Race/Ethnicity** section.



   c. Complete the group box shown below.

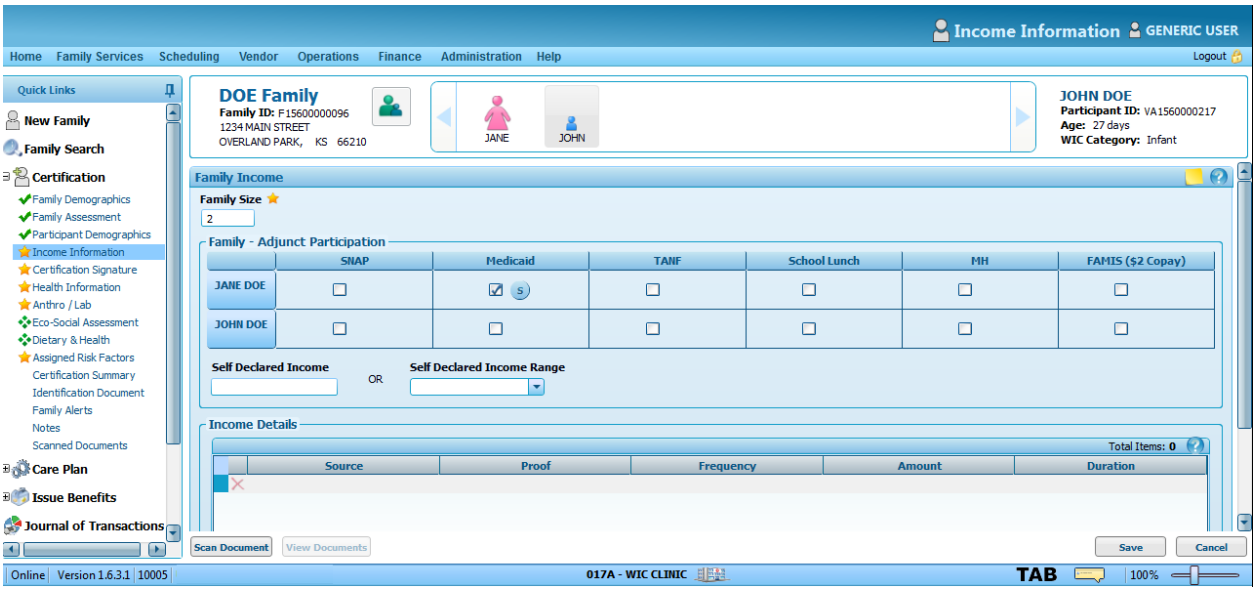


d. Complete the group box shown below.



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. Subsequent Certification – 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 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:

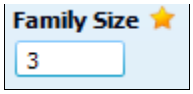
Detailed income declarations: Certifying a Pregnant Woman and Her Two Year Old Child scenario

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

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

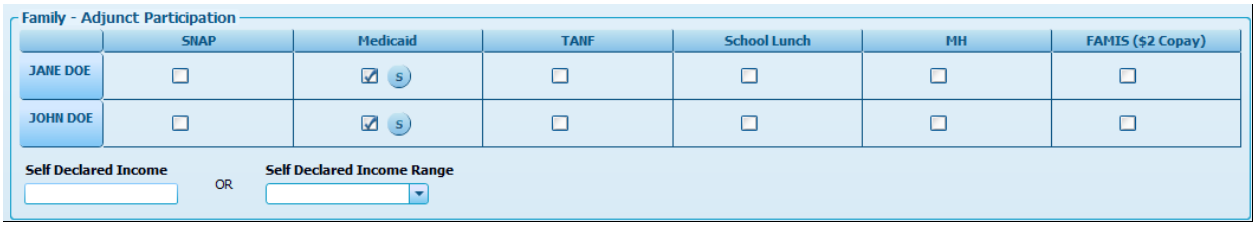
Complete the following steps to perform this task:

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



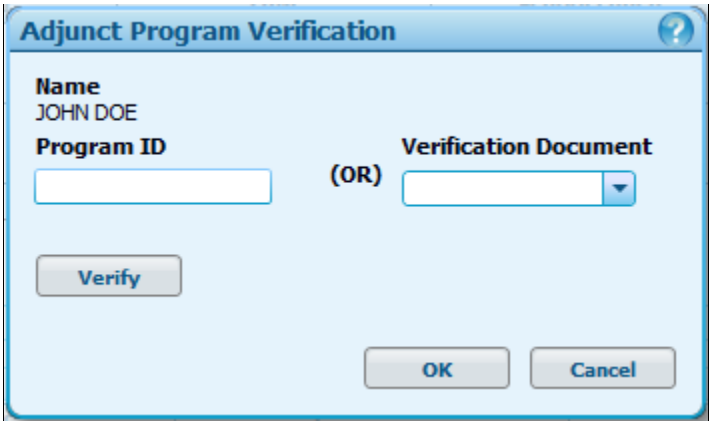
The value in the Family Size text box is carried over from the previous certification. Ensure that this value is updated accordingly for this Subsequent Certification.

2. Under **Adjunct Program**, select all programs that apply.

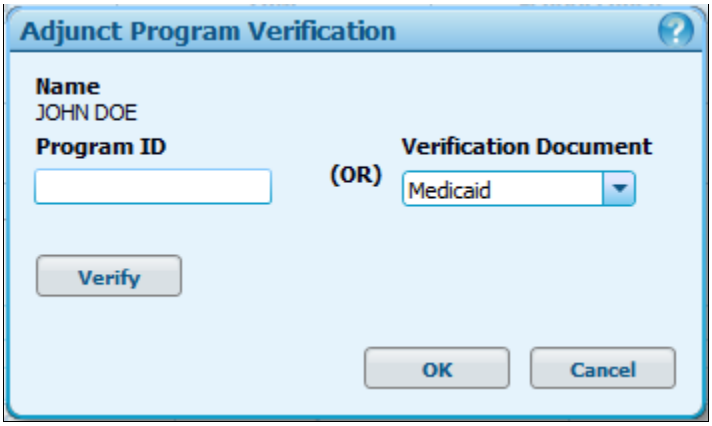


3. For each program selected, do the following:

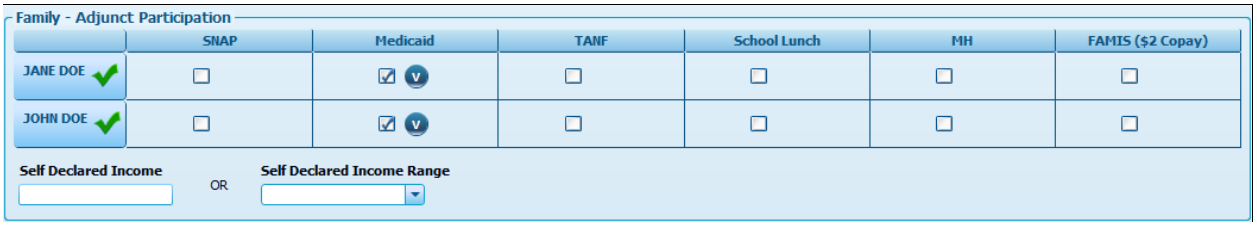
   a. Click the **Adjunct Program Verification** button to display options to document how adjunct eligibility was verified. The **Adjunct Program Verification** screen displays.



   b. Enter the **Program ID** and click **Verify** or select a **Verification Document.**



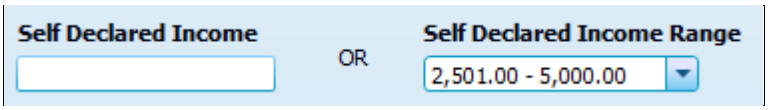
4. Click **OK** to process the screen. You are returned to the **Income Information** screen and the **Self Declared Income** and **Self Declared Income Range** text boxes are now enabled.



Once the Adjunctive Program Verification screen is completed, you are returned to the Income Information screen and a (verified) is displayed instead of an (self-declared).

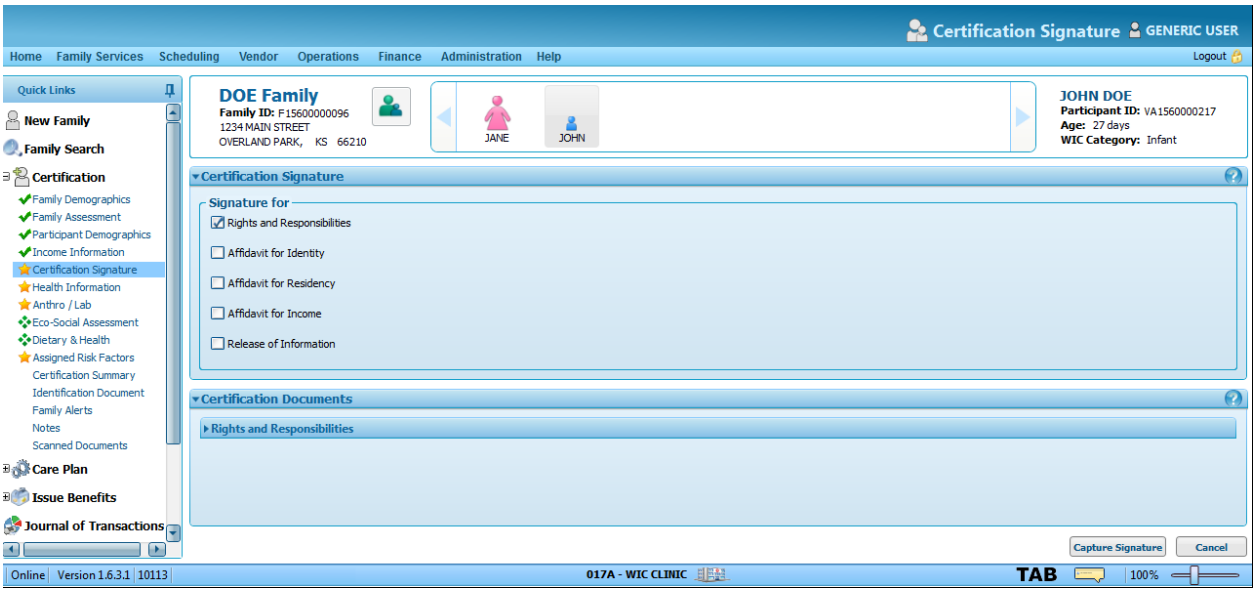
5. Do one of the following:

a. Enter a **Self Declared Income** or select a **Self Declared Income Range**.



> Self Declared Income and Self Declared Income Range are available only if adjunct program participation is documented and then verified and both make all family members income eligible.

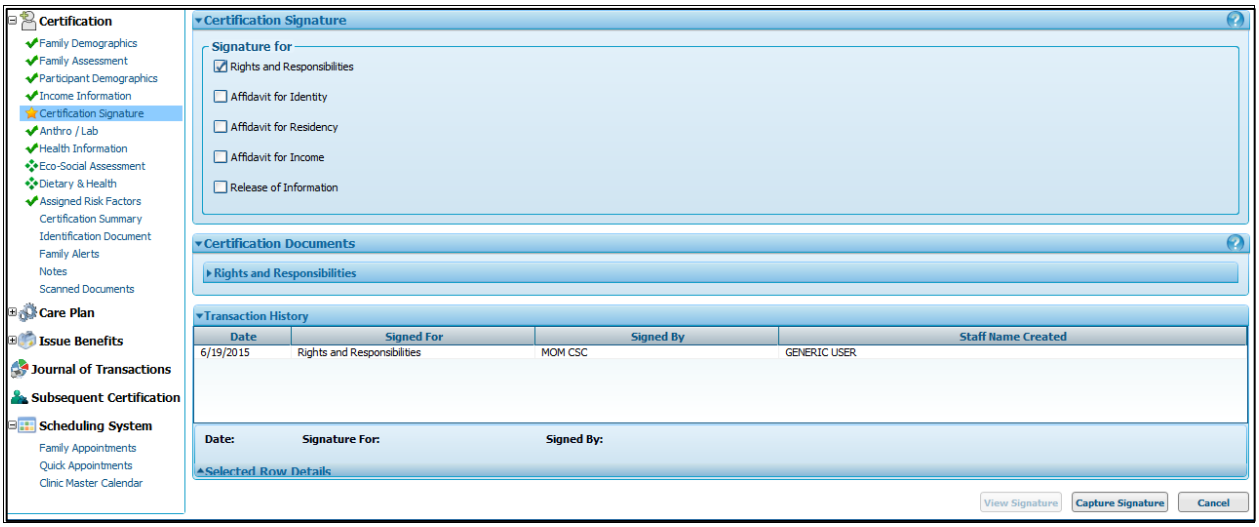
6. Click **Save**. A status message displays indicating success and you are navigated to the next screen in the process.



Task E. Subsequent Certification – 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) on which to capture a signature.



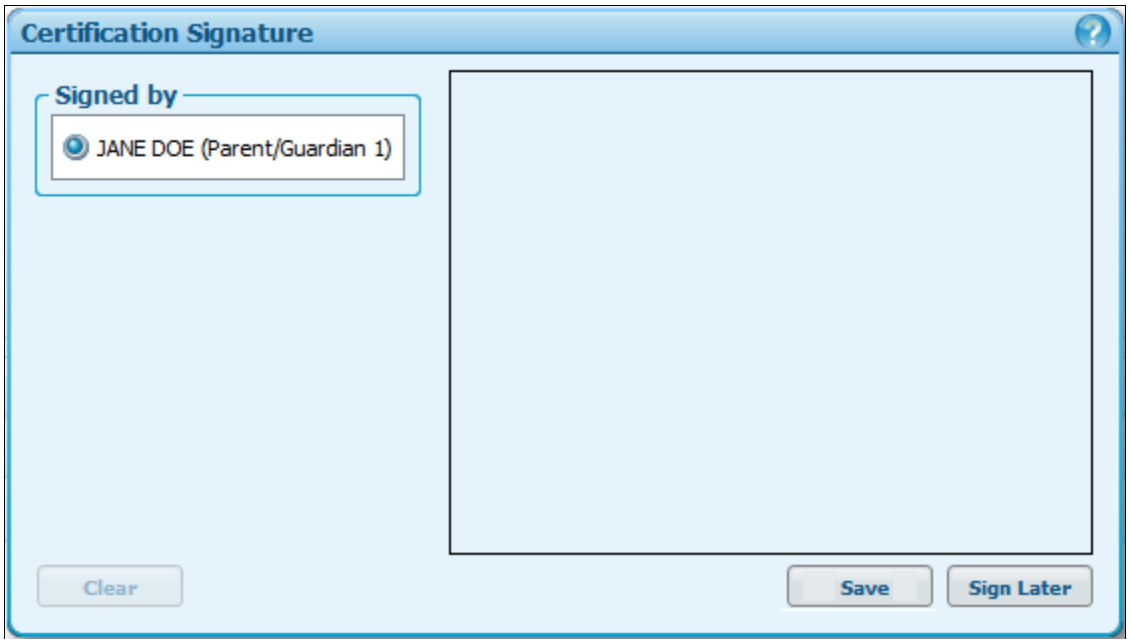
At least one option must be checked before the Capture Signature button is enabled.

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 is displays and can be viewed by clicking on the associated arrow button.

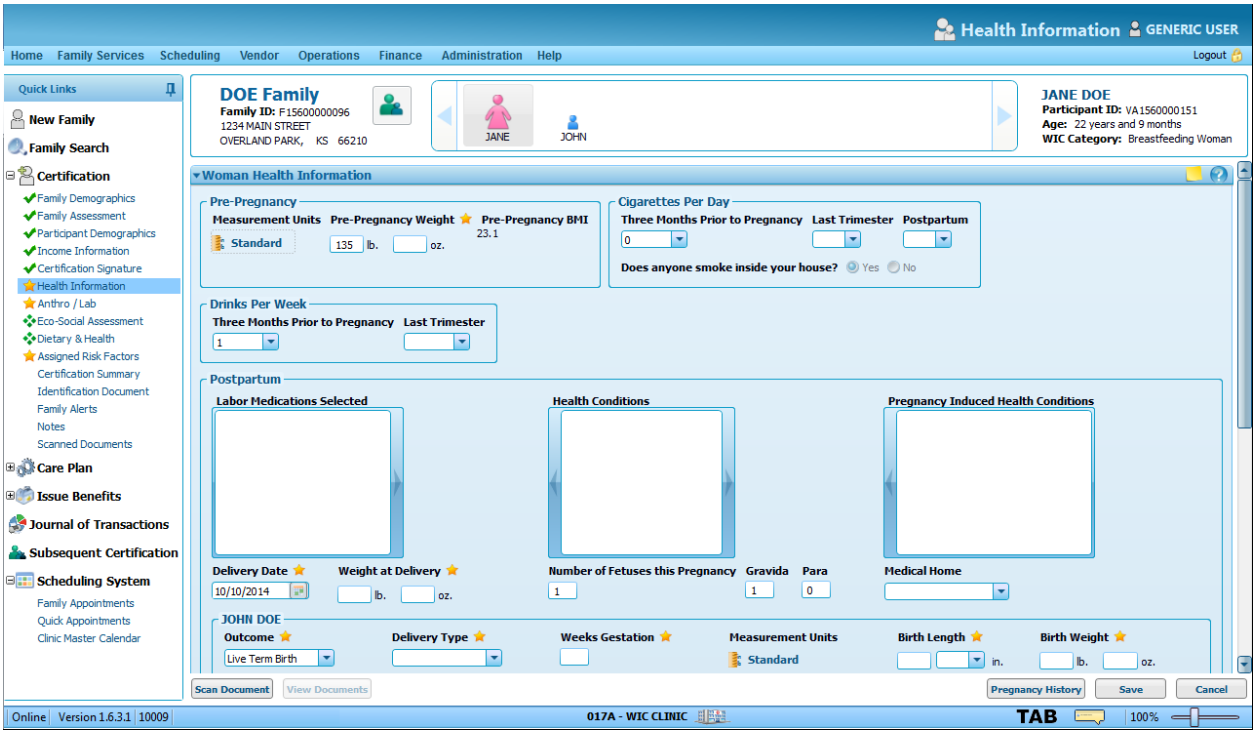
2. Click **Capture Signature** to capture an electronic signature. The **Certification Signature** screen displays.



a. Within the **Signed by** section, select the parent, guardian, or caretaker that plans to sign the electronic signature pad.

b. Direct the individual to sign.

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



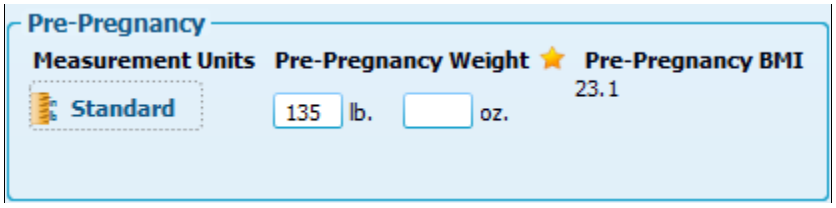
It is not necessary to complete the Certification Signature screen for each member of the family. Only one signature is required for the entire family. If you were to view other members of the family, a green checkmark icon (✔) displays since a signature was captured.

Task F. Subsequent Certification – Health Information Screen

As with the **Participant Demographics** screen, the **Health Information** screen must be completed separately for each family member. Complete the screen for each member and then click **Save** to save the changes for both members in one action.

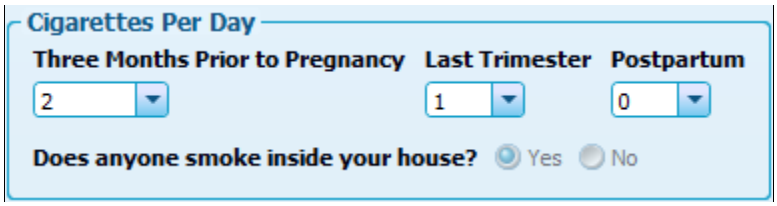
Complete the following steps to perform this task:

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

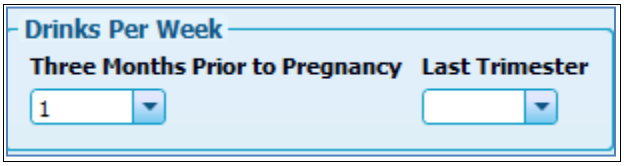


> After pre-pregnancy weight is entered, the pre-pregnancy BMI will not display unless the woman's height is entered on the Anthro screen.

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

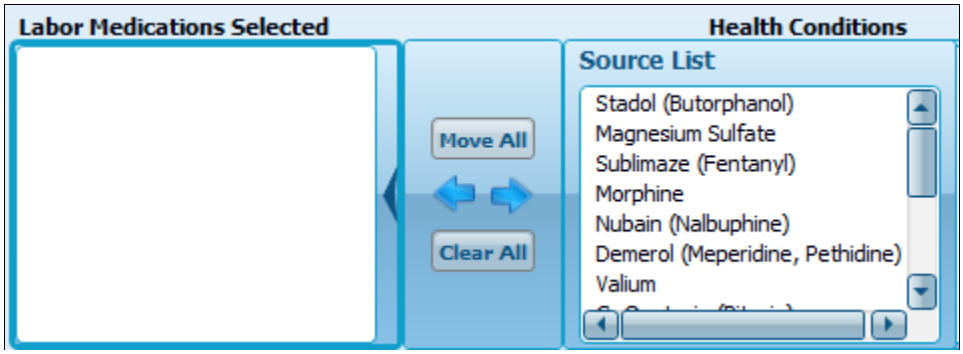


3. Complete the **Drinks Per Week** group box for the woman.

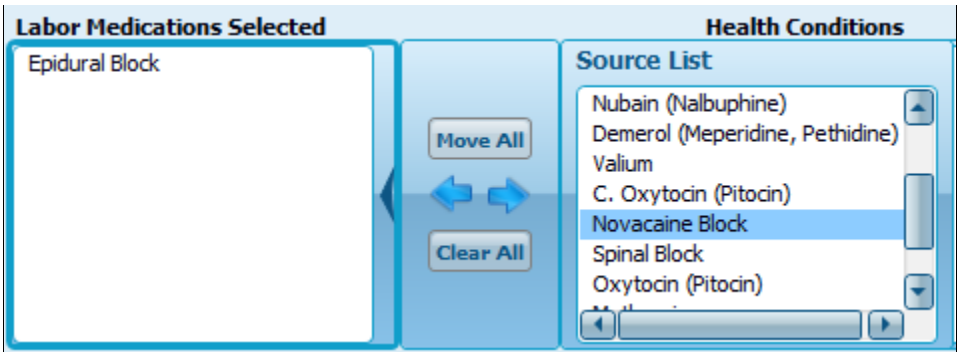


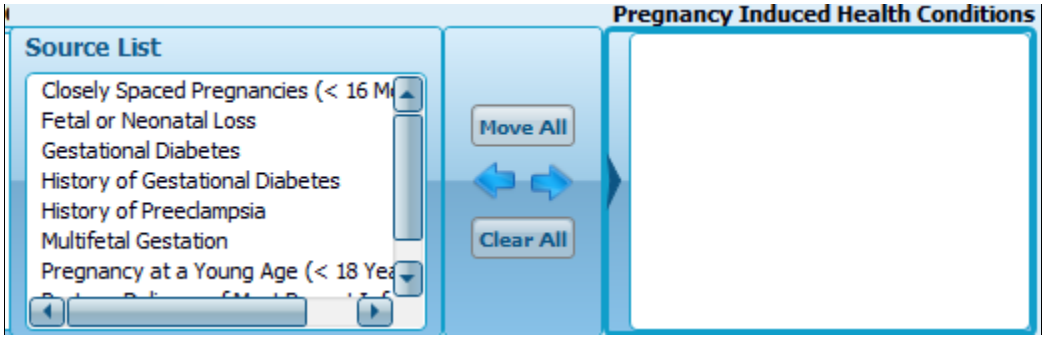
4. Within the **Postpartum** group box, complete each slider list box.

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



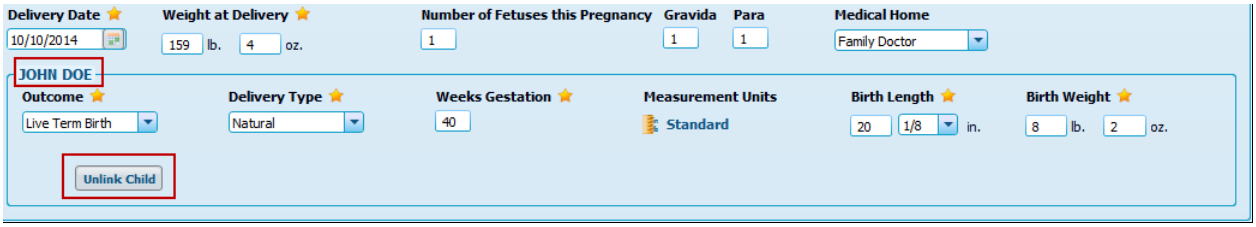
   b. Select applicable listings and click the **Left Arrow** button ( ) to move selections from the "available" list box to the "selected" list box, or double click the item from the source list and the system will place the selected item from the source list into the selected list. The slider list box collapses once all applicable listings are selected.





You may also multi-select items by holding down the control (Ctrl) key on your keyboard while using the mouse.

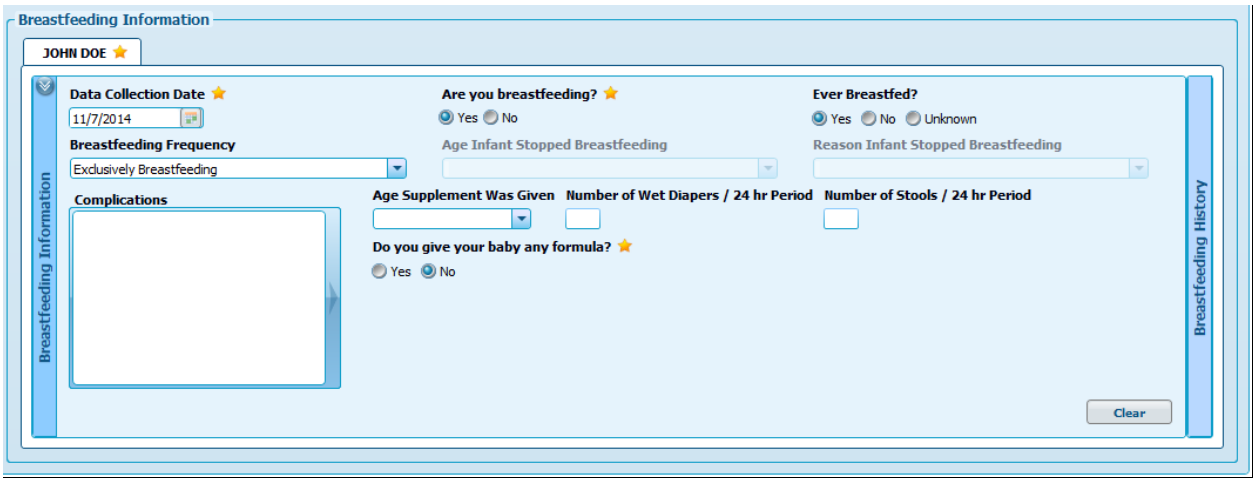
c. Complete the remaining items within the **Postpartum** group box.



Most group boxes are named according to the type of information displayed within the group box itself. However, in this case, the name of the group box is the name of the associated infant. In the example above, the infant's name is "John Doe". Therefore, the name of the group box is "John Doe".

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

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

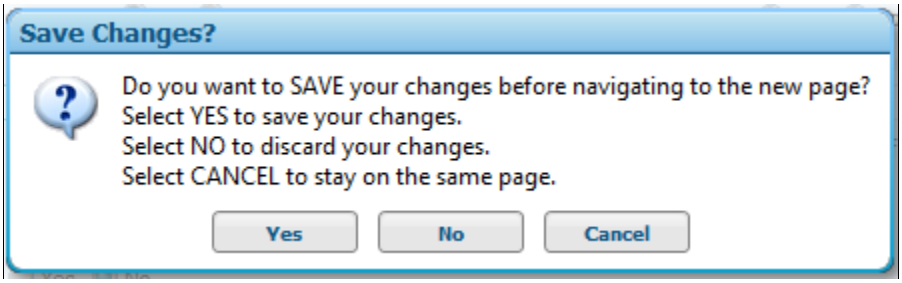


Most group boxes within the system are named based on the type of information displayed within the group box itself. However, in this case, the group box is named after the associated infant. For example, the infant's name is "John Doe" and the name of the group box is titled "John Doe".

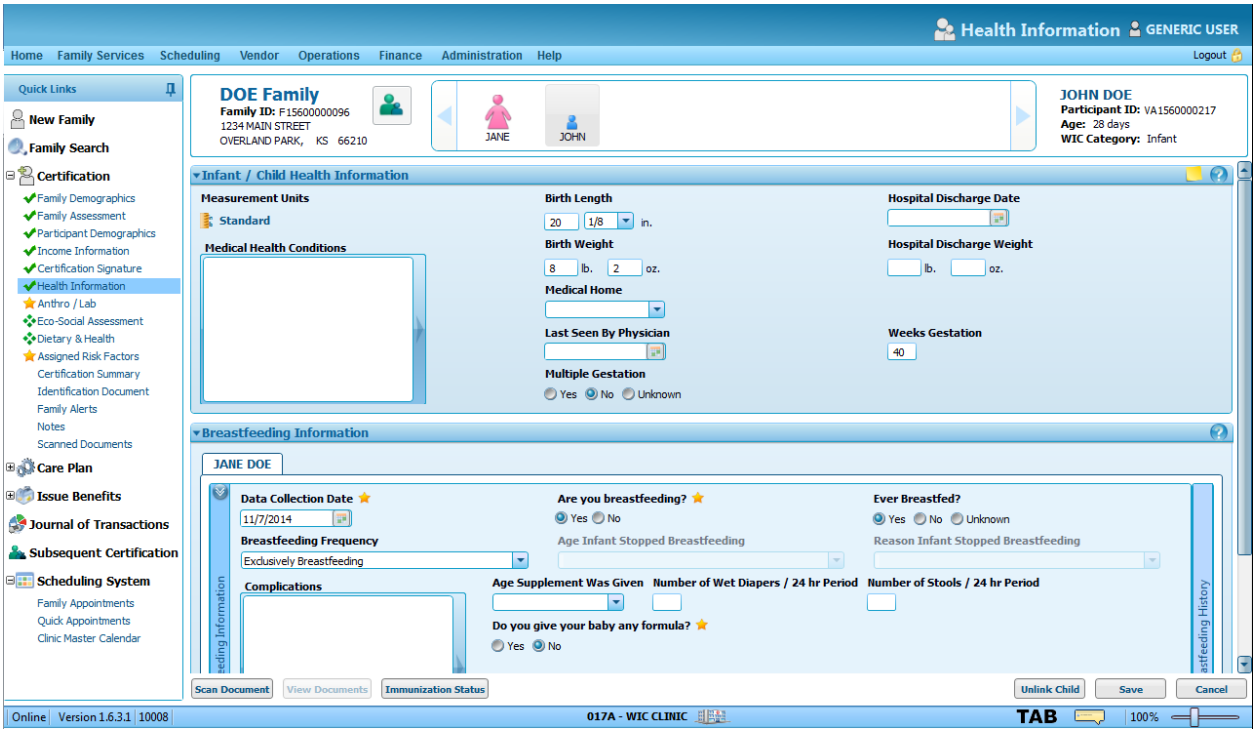
A separate tab for each infant will be displayed if the woman's delivery resulted in more than one live birth.

For training purposes, the intent is to identify the woman as exclusively breastfeeding and the infant as fully breastfed. Select "Yes" for both Ever Breastfed and Are you breastfeeding? Additionally, select "No" for Do you give your baby any formula?

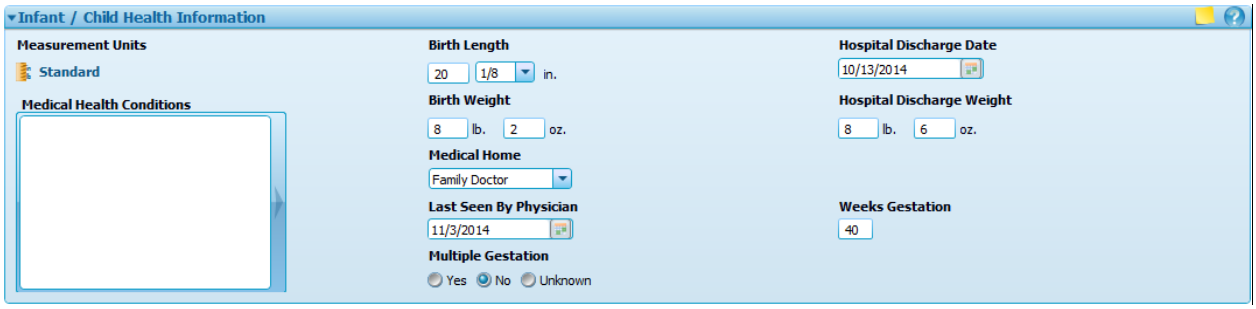
6. Select the infant member icon within the Family Header. A confirmation screen displays with several options.



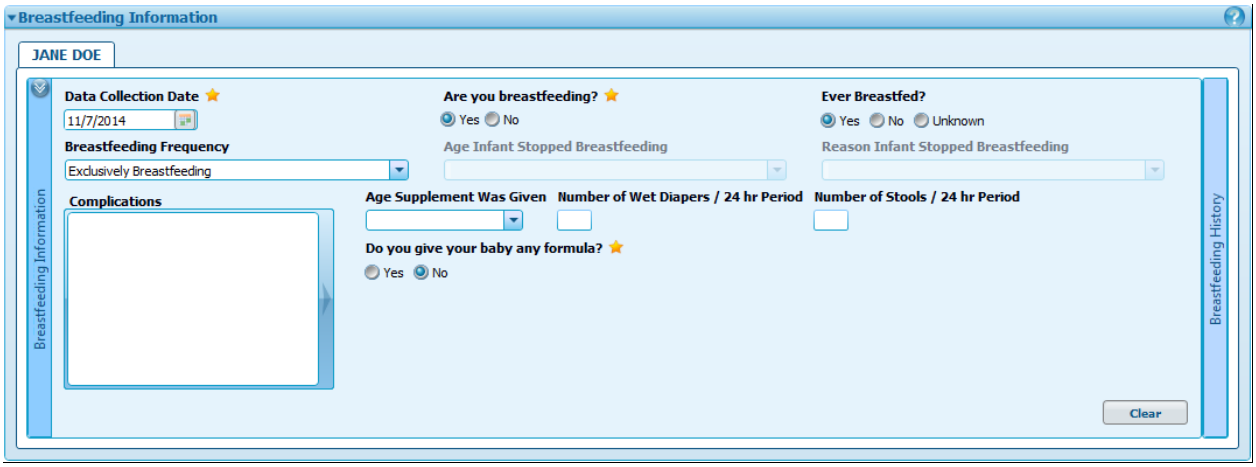
7. Click **Yes** to save your changes. A status message displays indicating the woman's health information is saved and the **Health Information** screen displays for the infant.



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



9. Review and/or modify the **Breastfeeding Information** section for the infant as necessary.

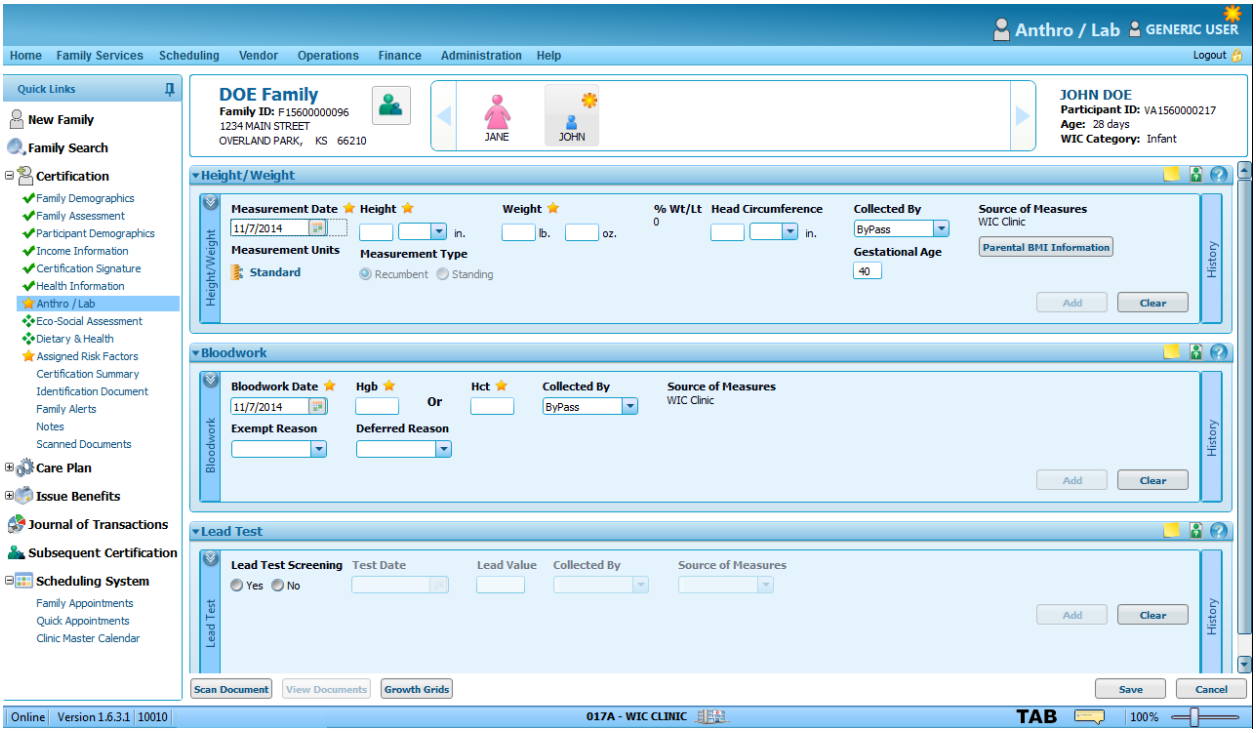


Most group boxes within the system are named based on the type of information displayed within the group box itself. However, in this case, the group box is named after the associated mother of the infant. For example, the mother's name is "Jane Doe" and the name of the group box is titled "Jane Doe".

The mother and infant are linked. Therefore the selections made about the infant's feeding status are copied from the woman's Health Information screen to the infant's Health Information screen. Simply review the Breastfeeding Information and ensure it is accurate. If necessary, update the information. Once Save is clicked, the associated woman's information is updated automatically.

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

10. Click **Save** to save your changes. A status message indicates success and the next screen in the process displays.

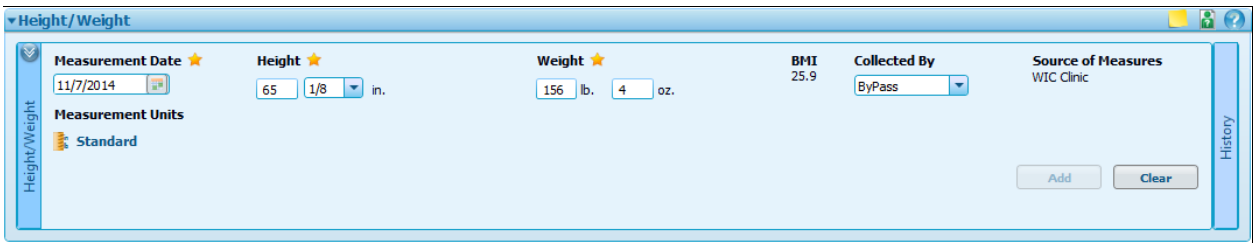


Task G. Subsequent Certification – Anthro/Lab Screen

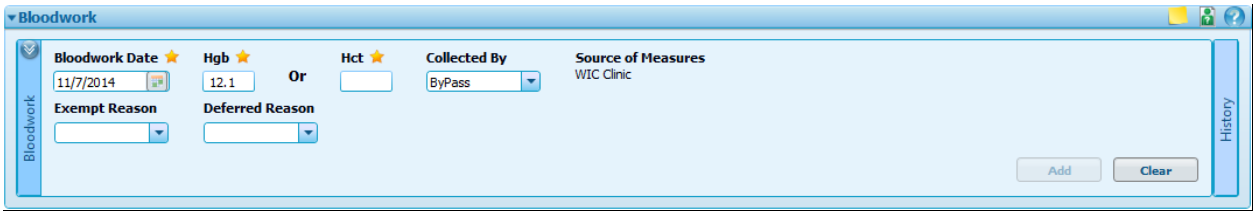
As with the **Participant Demographics** and **Health Information** screens, the **Anthro/Lab** screen must be completed separately for each family member.

Complete the following steps to perform this task:

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

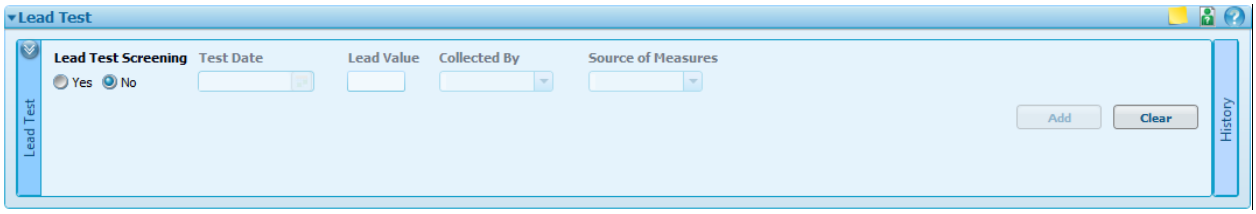


2. Complete the **Bloodwork** for the woman.

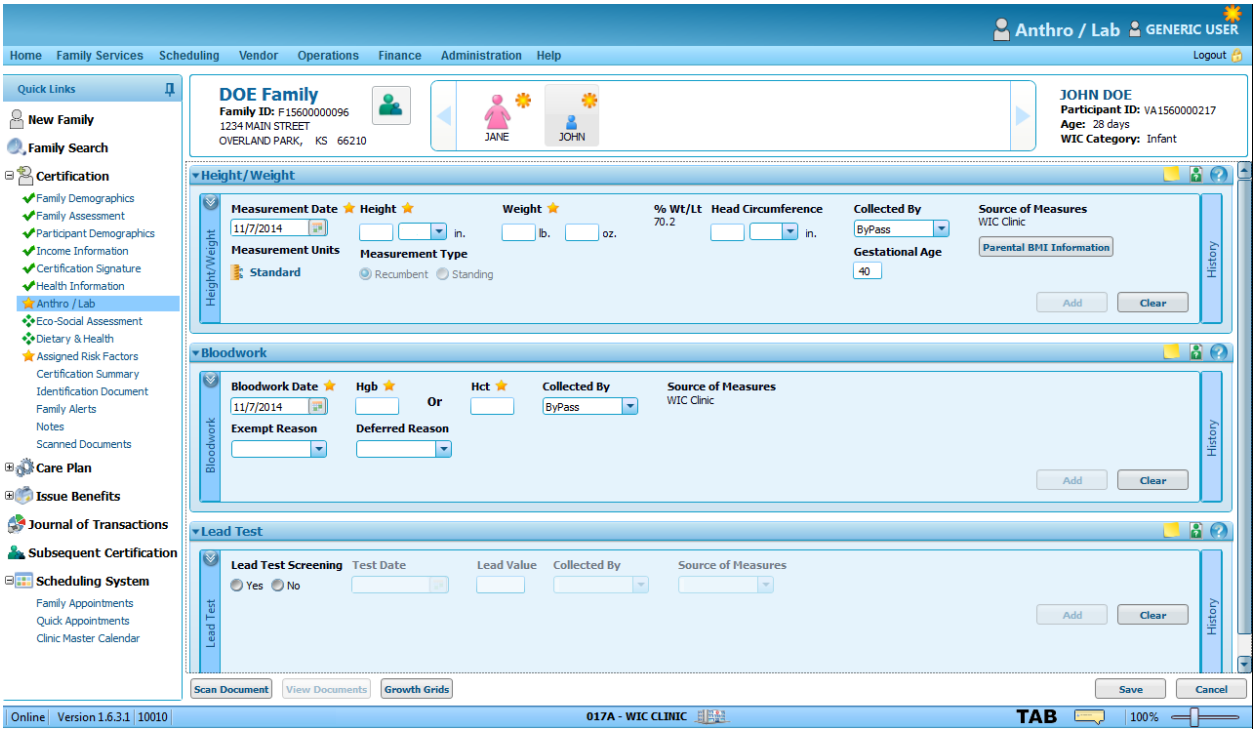


> Bloodwork is required for both Breastfeeding and Non-breastfeeding women for the initial postpartum Certification.
>
> Bloodwork is required for the 6-12 month postpartum certification if the last bloodwork was collected prior to the actual delivery date.

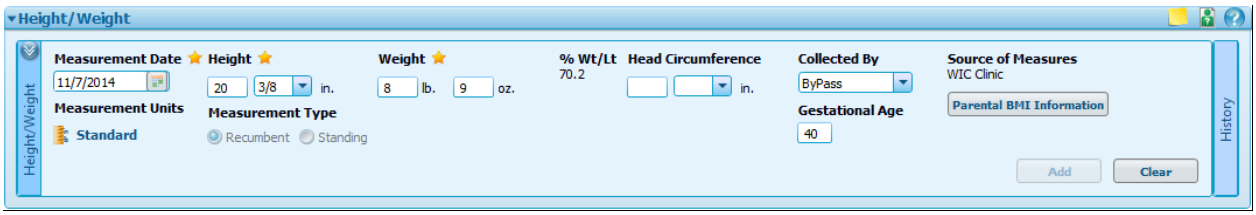
3. Complete the **Lead Test** for the woman, if applicable.



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

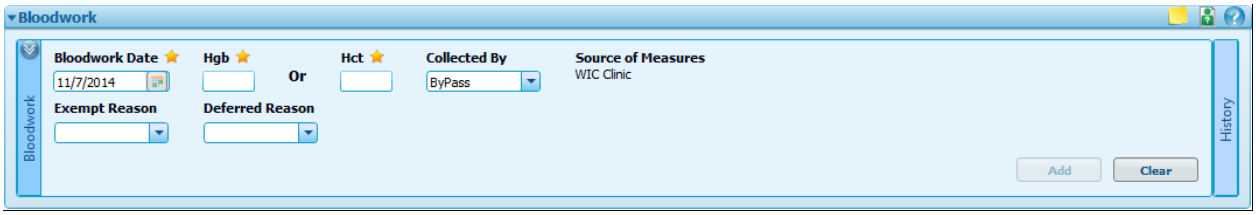


5. Complete the **Height/Weight** for the infant.



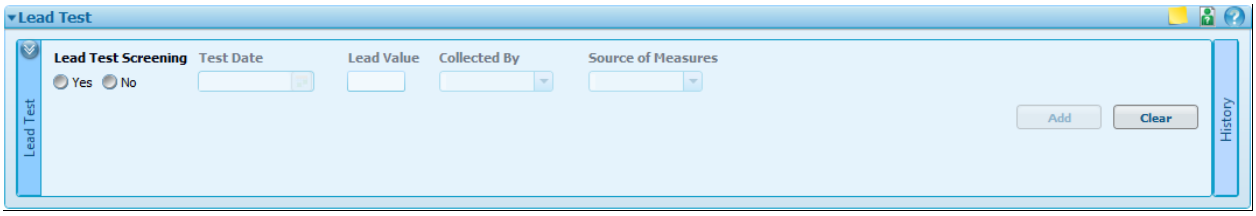
Head Circumference is a state-configurable field. Document according to state and/or local policy guidelines.

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



Complete the Blood work and Lead Test as necessary for the infant, if applicable.

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 participants' age (or gestation weeks for the pregnant woman) at the time of the measurement will also be calculated and used for plotting. The head circumference for age will be calculated and displayed as well.

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

BMIToAge

HCToAge

LengthToAge

StatureToAge

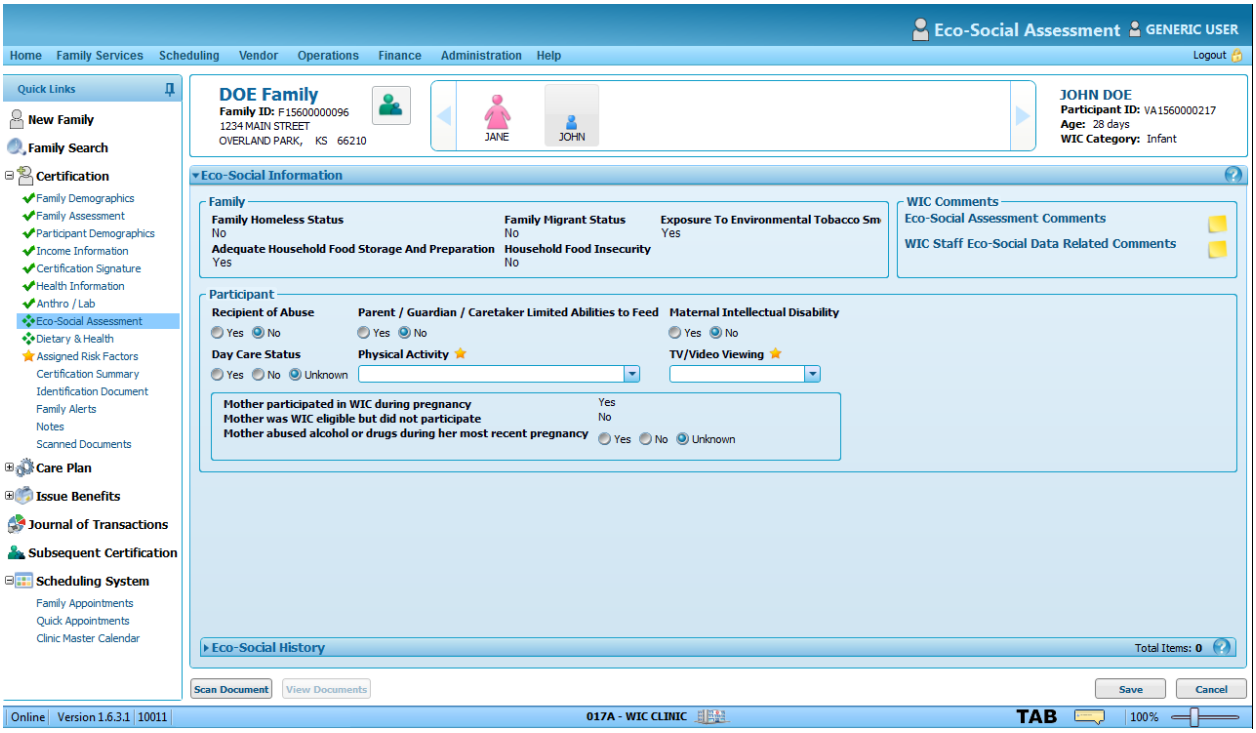
WeightToAge

WeightToLength

WeightToStature

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

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



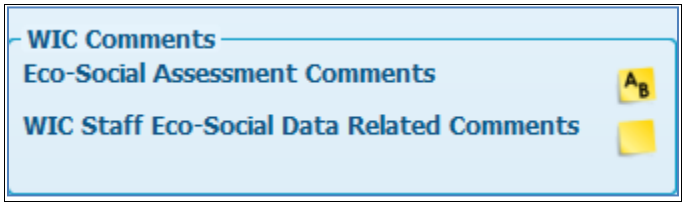
Task H. Subsequent Certification – Eco-Social Assessment Screen

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

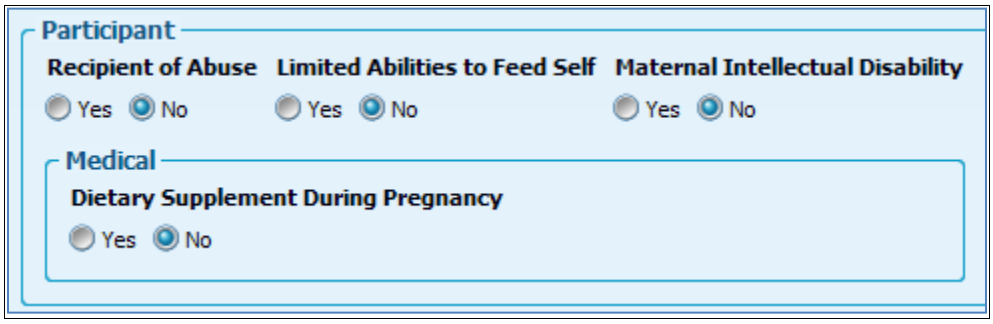
Complete the following steps to perform this task:

1. Review the **Family** section for the family. Any changes will need to be made on the **Family Assessment** screen.

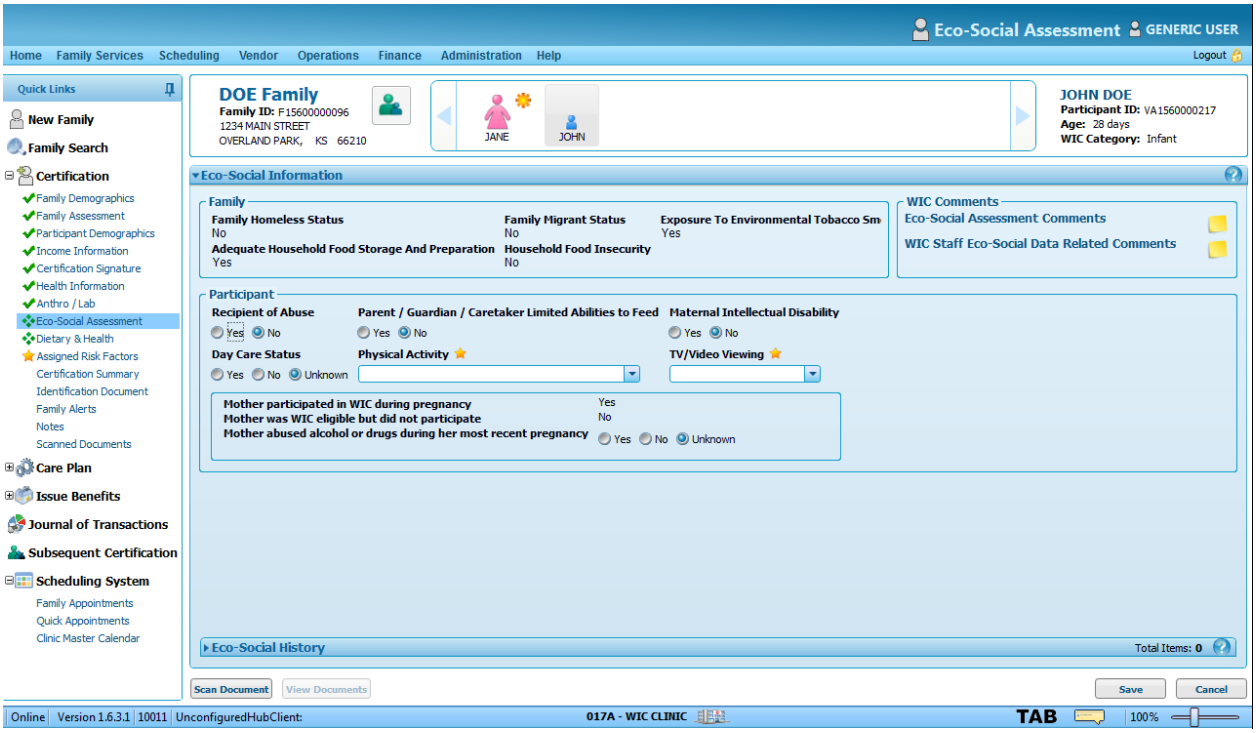
2. Complete the **WIC Comments** section for the woman.



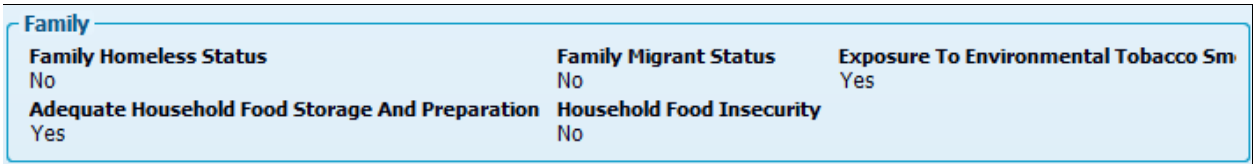
3. Complete or edit the **Participant** section for the woman.



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

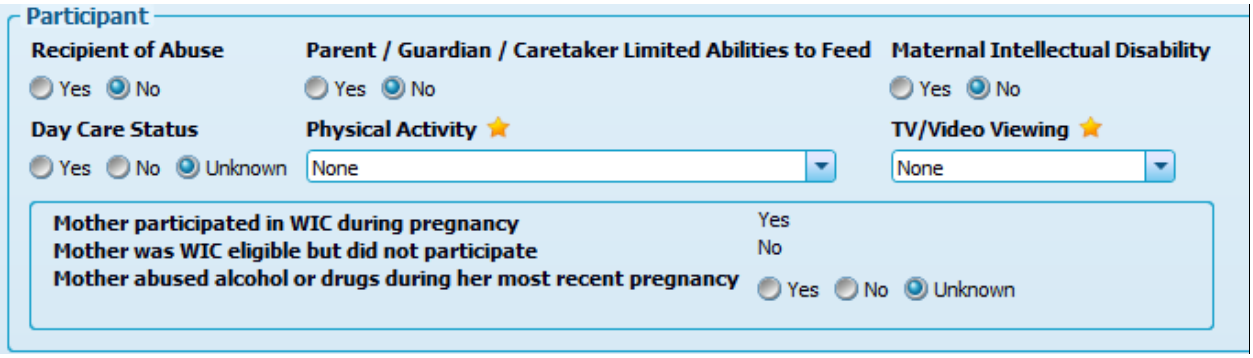


5. Complete the **Family** section for the infant. Any changes will need to be made on the **Family Assessment** screen.

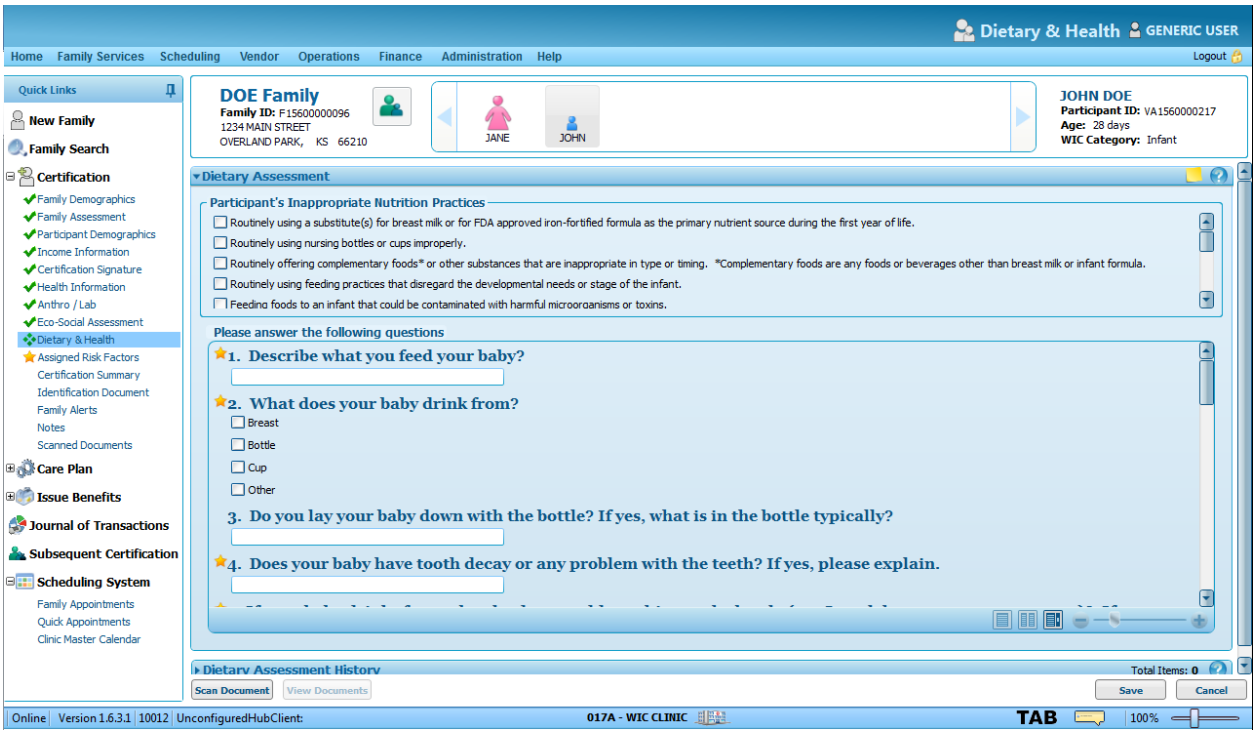


6. Complete the **WIC Comments** section for the infant.

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



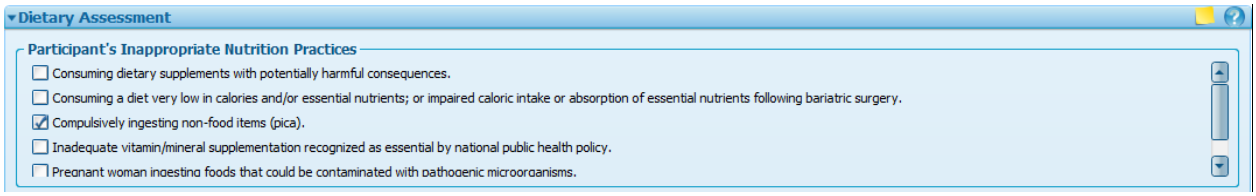
8. Click **Save**. A status message displays indicating success and you are navigated to the next screen in the process.



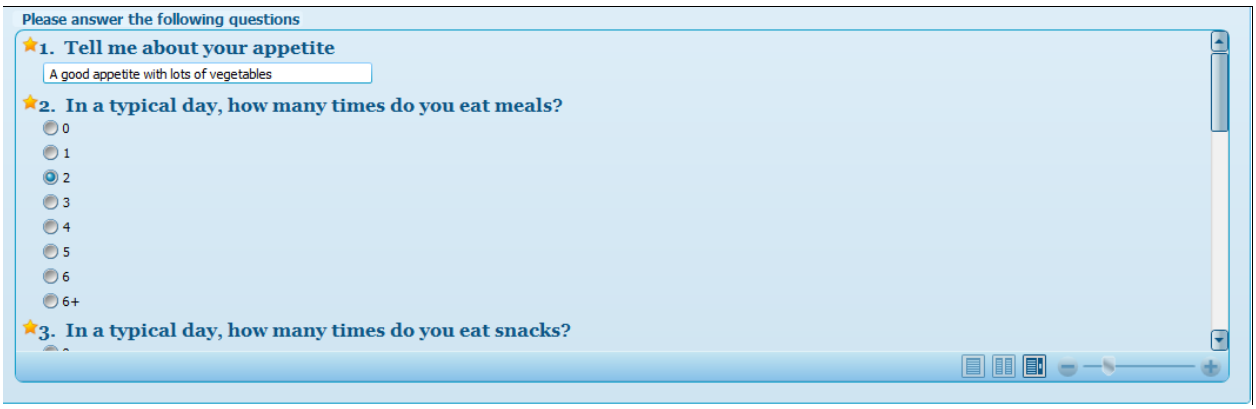
Task I. Subsequent Certification – Dietary & Health Screen

Complete the following steps to perform this task:

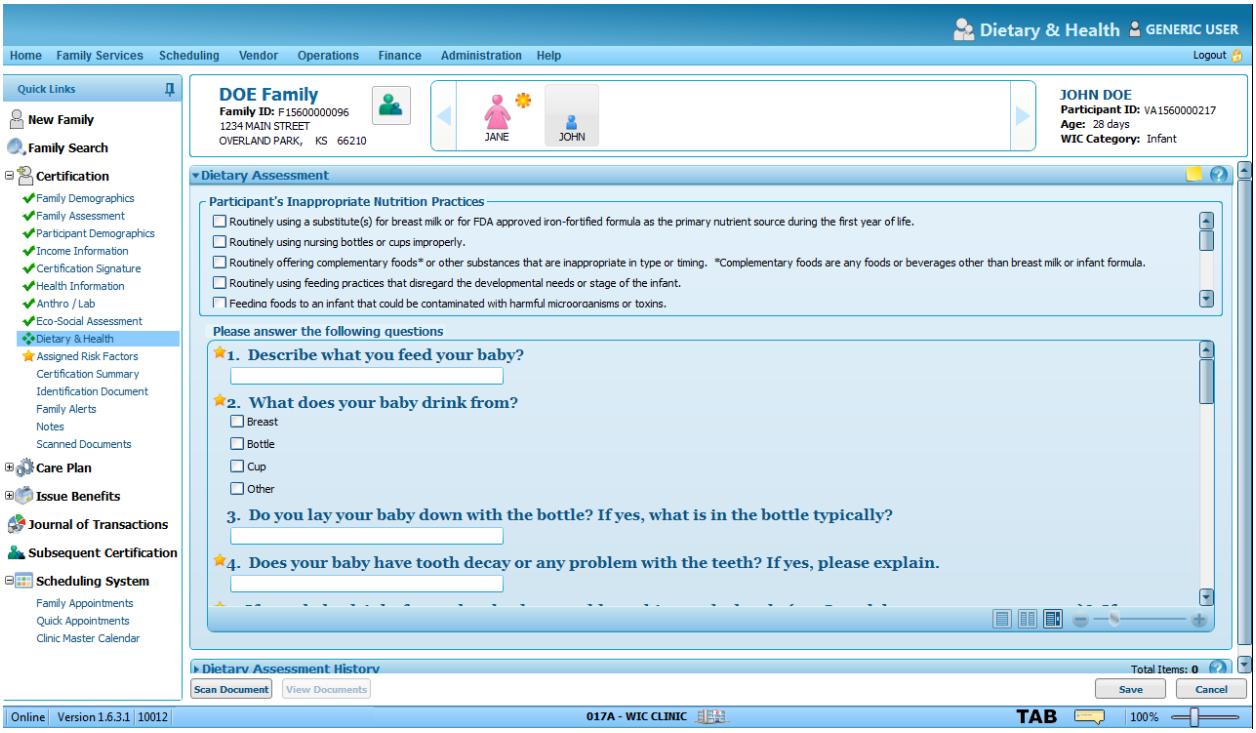
1. Complete the **Participant's Inappropriate Nutrition Practices** section for the woman.



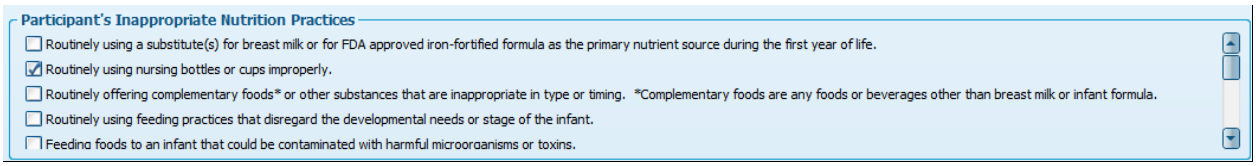
2. Complete the **Please answer the following questions** section for the woman.



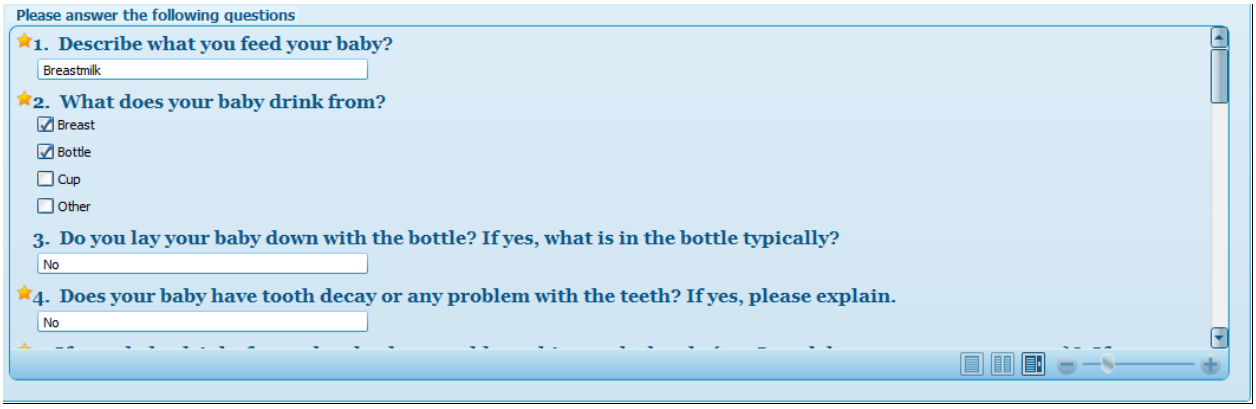
3. Select the infant member icon within the family header. The **Dietary & Health** screen displays for the infant.



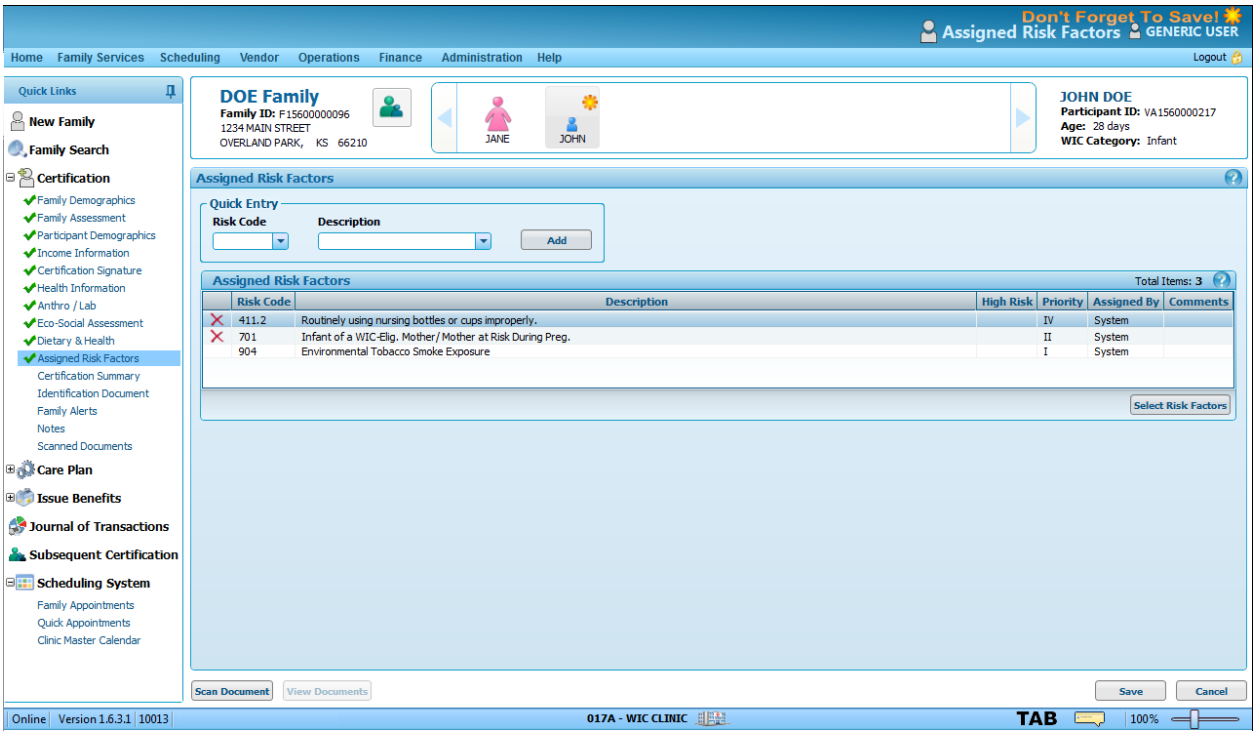
4. Complete the **Participant's Inappropriate Nutrition Practices** section for the infant.



5. Complete the **Please answer the following questions** section for the infant.



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



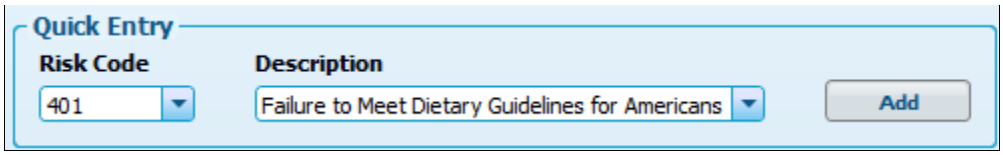
Task J. Subsequent Certification – Assigned Risk Factors Screen

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

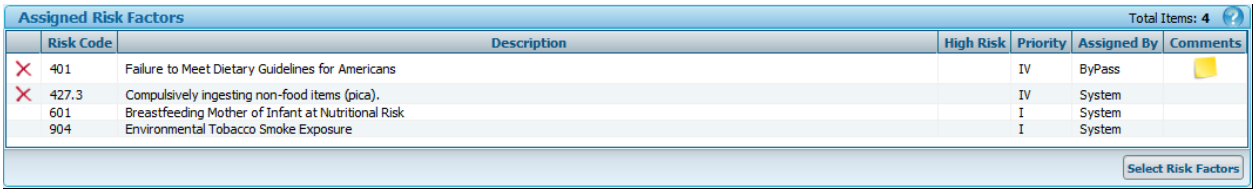
Complete the following steps to perform this task:

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

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

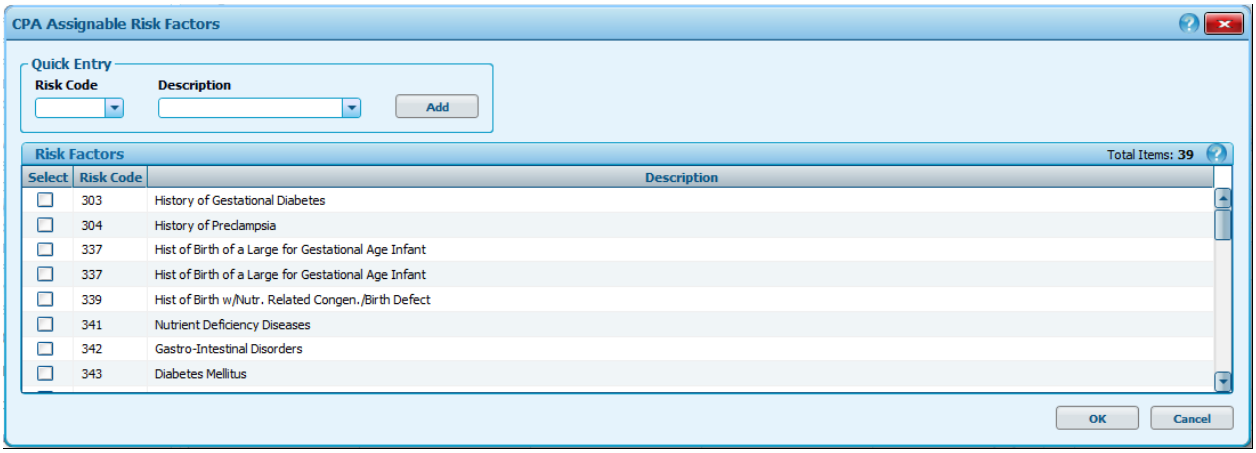


   b. Click **Add**. The selected **Risk Factor/Description** is added to the **Assigned Risk Factors** grid.

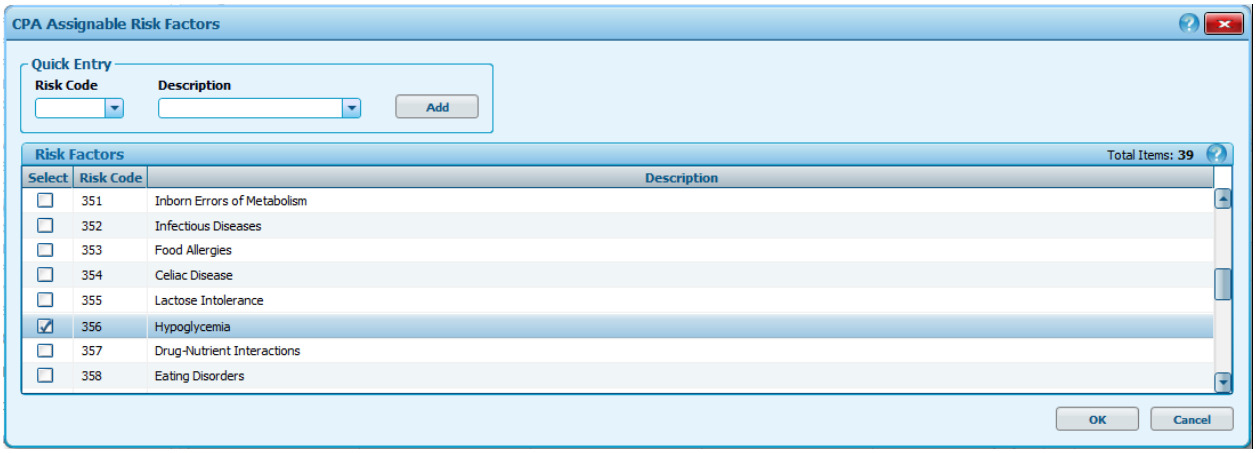


> If a breastfeeding woman (mother) has any dyad linked infant with both risk factor 702 assigned and any other risk factor assigned, risk factor 601 is assigned to the breastfeeding mother.

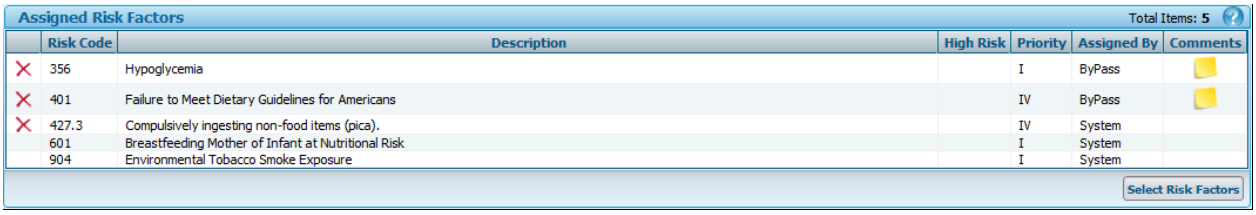
   c. Click **Select Risk Factors**. The **CPA Assignable Risk Factors** screen displays.



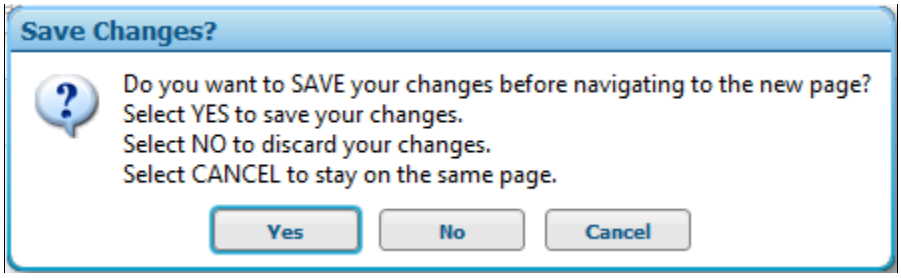
d. Select all applicable risk factors from within the **Risk Factors** grid.



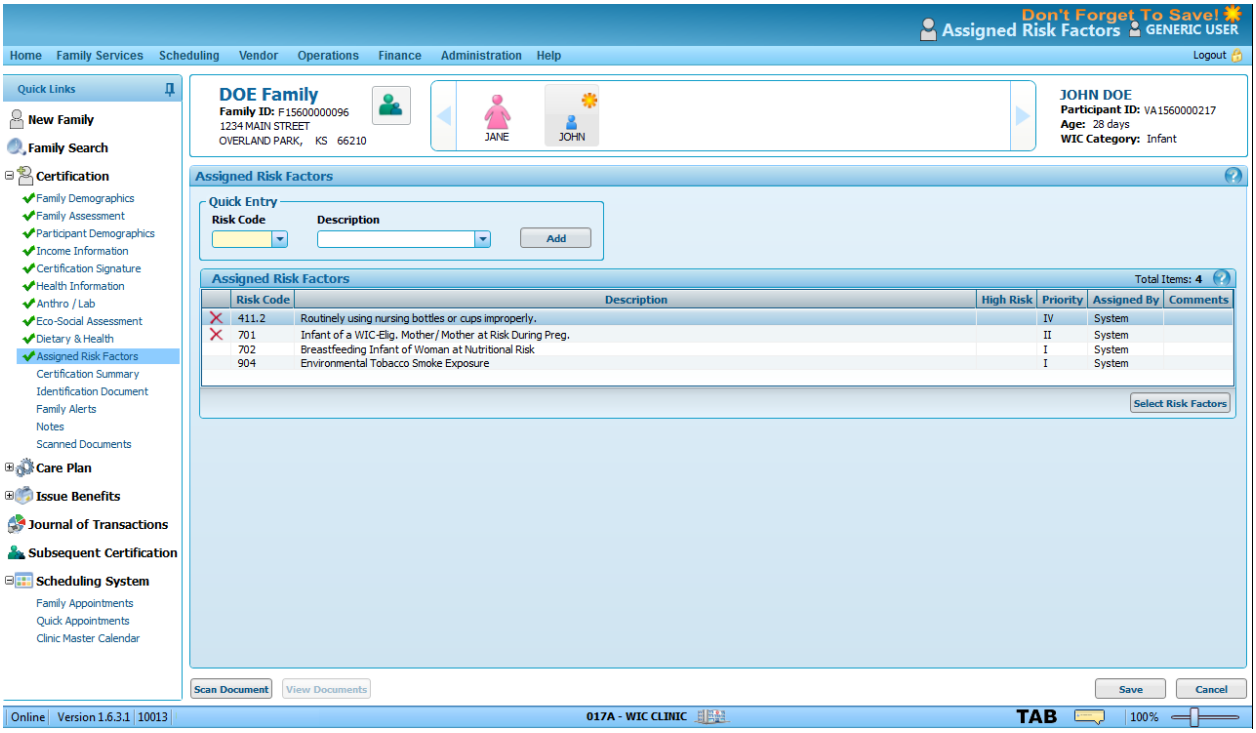
e. Click **OK**. You are returned to the **Risk Factors** screen and the **Assigned Risk Factors** grid is updated.



2. Select the infant member icon within the family header. If changes were made, a confirmation message displays prompting you to save changes.

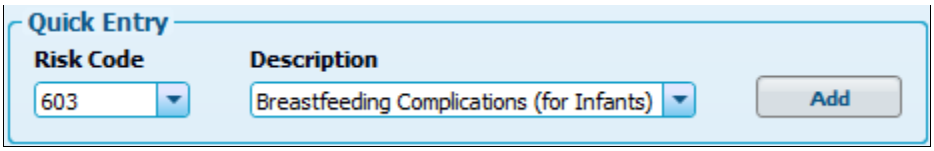


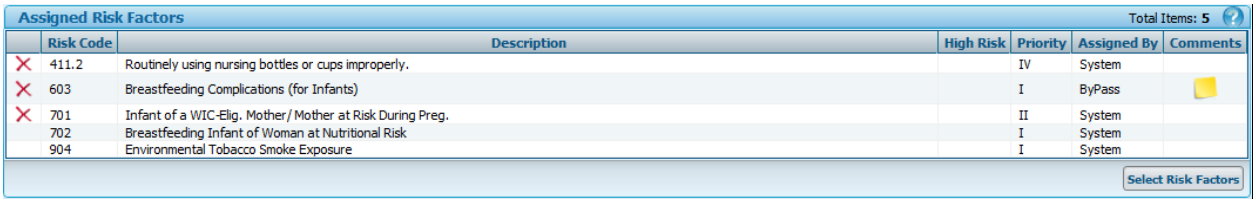
3. If changes were made, click **Yes** to save the changes. The **Assigned Risk Factors** screen displays for the infant.



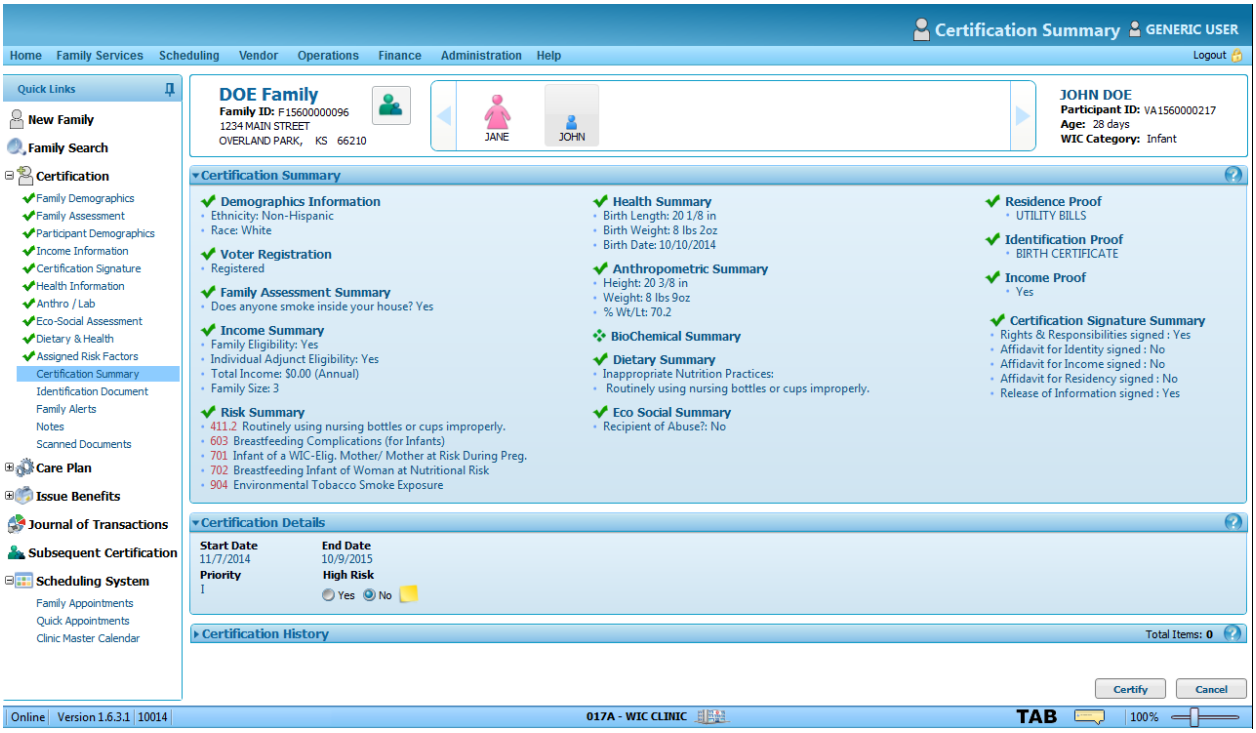
If a breastfed infant's linked mother has both risk factor 601 assigned and any other risk factor assigned, risk factor 702 is assigned to the breastfed infant.

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





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



Task K. Subsequent Certification – 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.

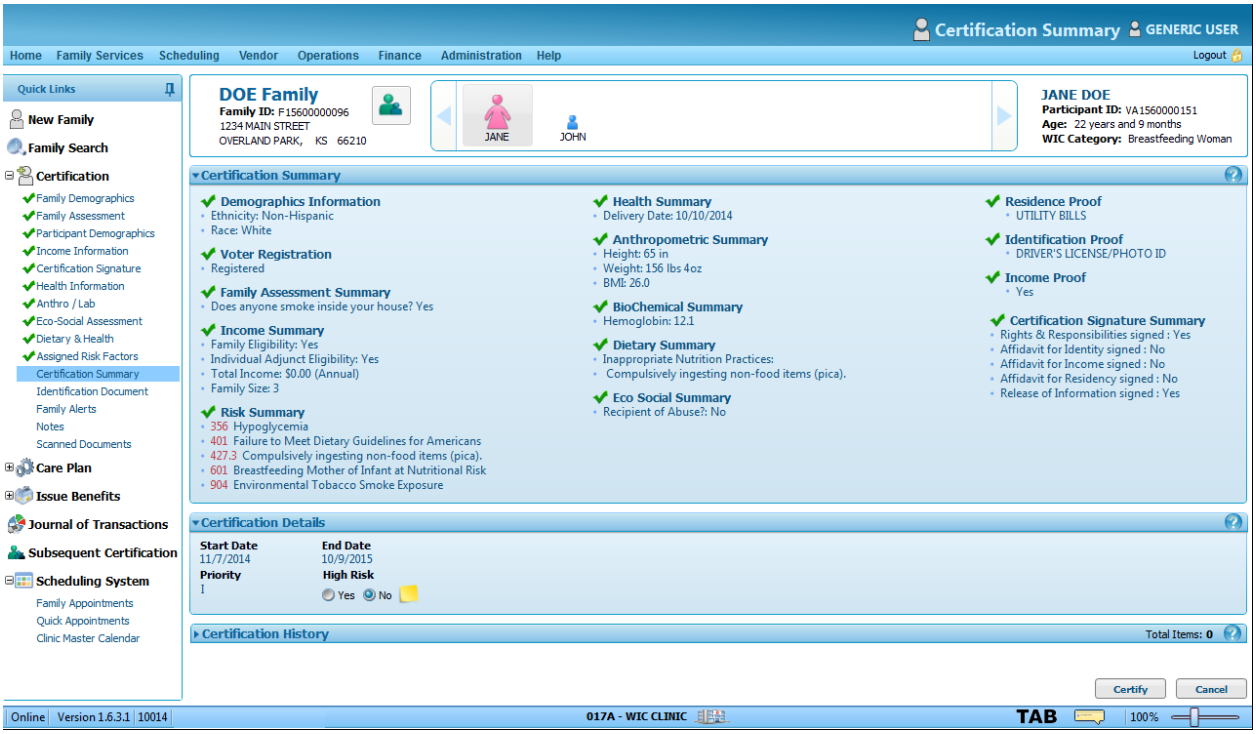
Under **Certification Details**, information such as the **Start Date**, **End Date**, **Priority Level**, and a **High Risk Indicator** (H) is displayed for the member.

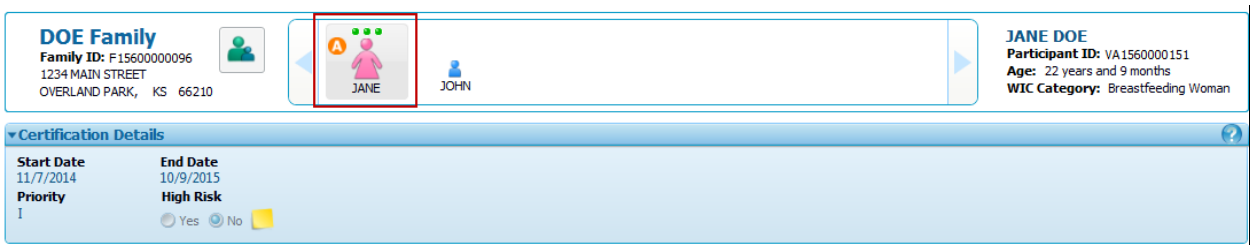
Complete the following steps to perform this task:

1. 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 can complete the next step.

> 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.

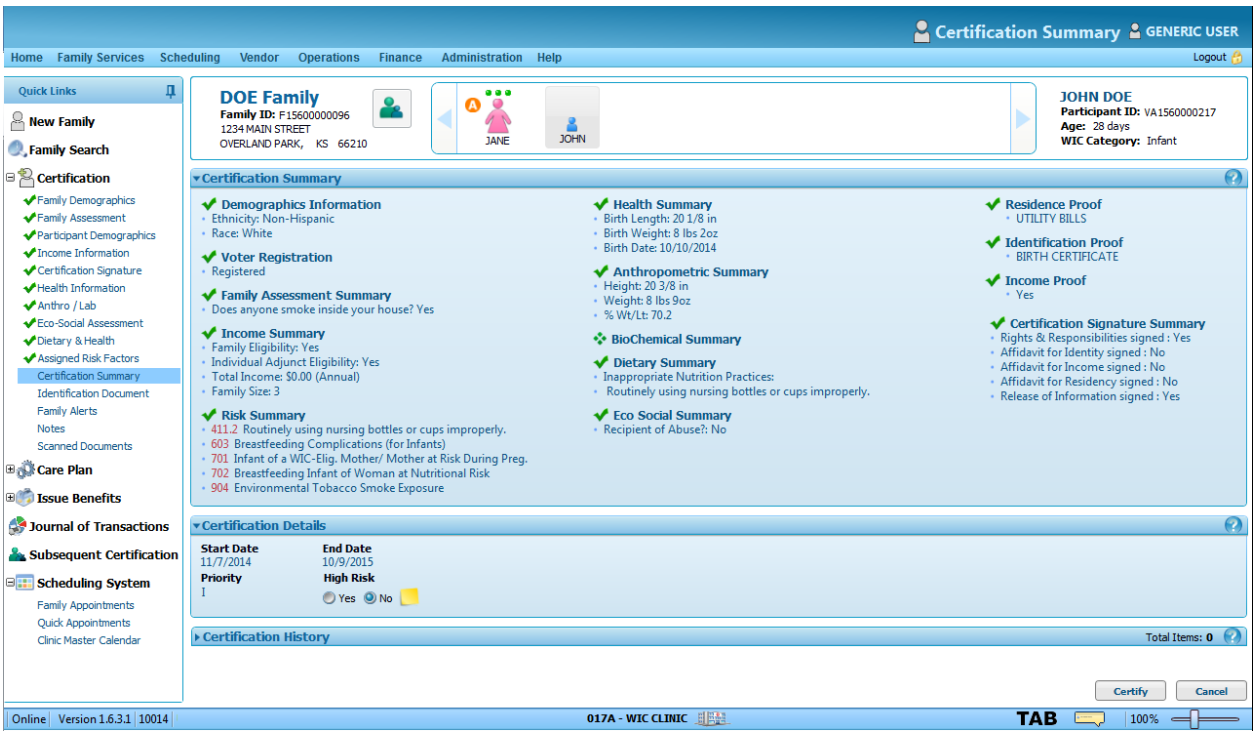
2. Click **Certify** to complete the certification process for the woman. A status message displays indicating success and the **Certification Summary** screen is refreshed.





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.

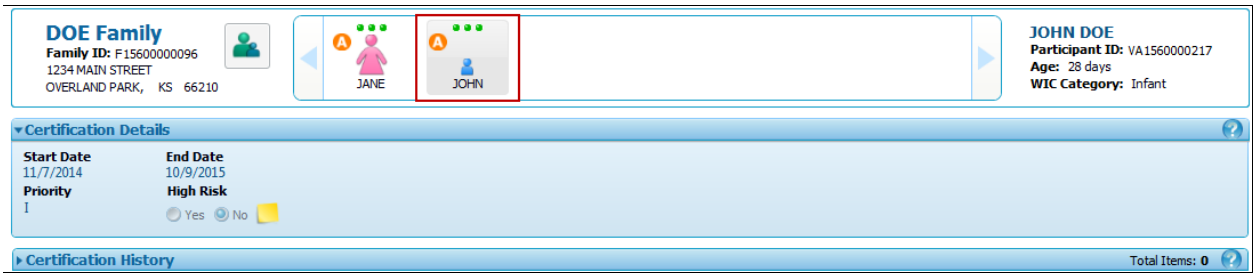
3. Select the infant member icon within the family header. The **Certification Summary** screen displays for the infant.



4. Review the **Certification Summary** screen for the child to ensure the certification's accuracy and completeness.

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.

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



Congratulations!

You have successfully completed the **Subsequent Certification of a Breastfeeding Woman and an Initial Certification of Her Infant** process.

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17- SCHEDULING SYSTEM

Scheduling System

The process of scheduling a family appointment can be accomplished from both the Applicant and Family Services (Clinic) module and the Scheduling module. In either case, a family record must exist to schedule an appointment. This scenario will focus on scheduling a family appointment through the Applicant and Family Services module.

In this scenario, assume a family who is new to WIC has called the clinic and after the telephone interview the WIC staff has created a new family record and is ready to make an initial certification appointment for a family consisting of a pregnant woman and her two-year-old daughter. After scheduling a family appointment, this scenario will describe the process of rescheduling the appointment, cancelling the appointment, and the process of marking the appointment as kept when the family arrives for the appointment.

This process includes the following task(s):

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

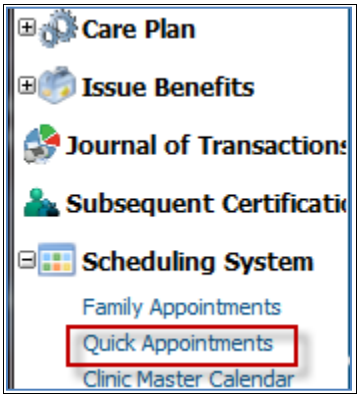
Task A. Scheduling a Family Appointment

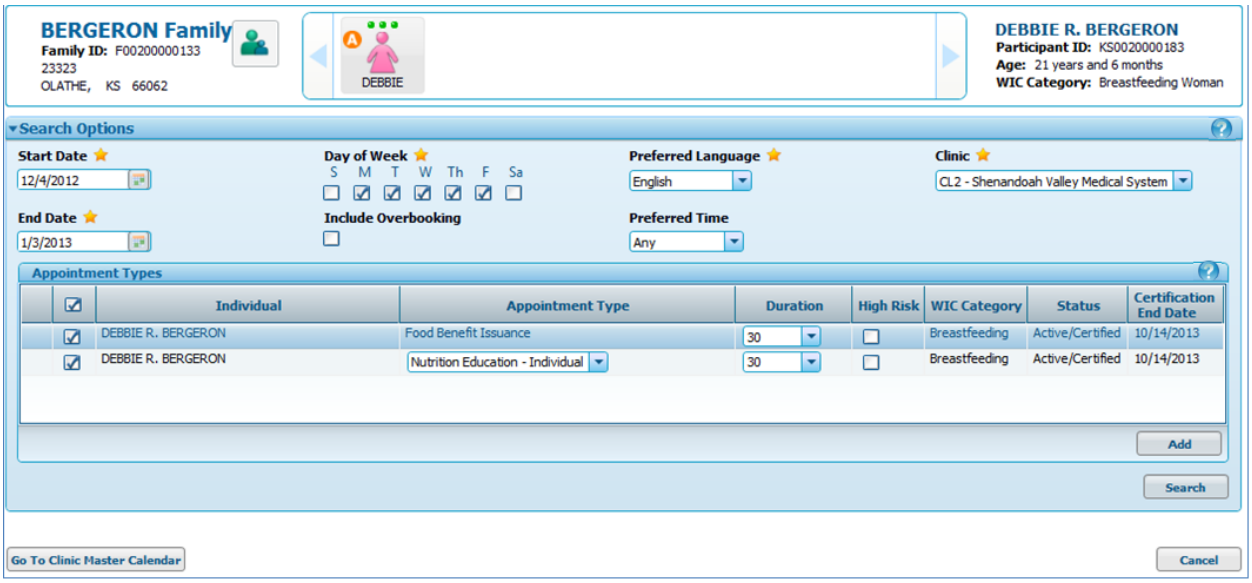
Complete the following steps to perform this task:

1. Conduct a search for the family.
   - If the family record is found, access the record and proceed to Task C to schedule an appointment.
   - If the record is not found, add a family record.

> It is important to search for the family before adding a family record to prevent adding a duplicate record.

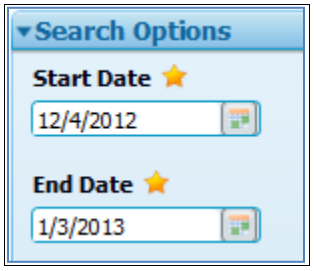
2. Add the family record with the two applicants.
3. Go to **Quick Links → Scheduling System → Quick Appointments**. The **Quick Appointments** screen displays.





4. Under **Search Options**, select the **Start Date** and **End Date** for the appointment search.

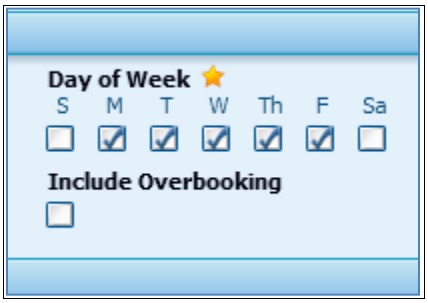
> The Start Date defaults to today's date and the End date defaults to one month from today. The search Start Date shows 12/04/12, the date of the search.



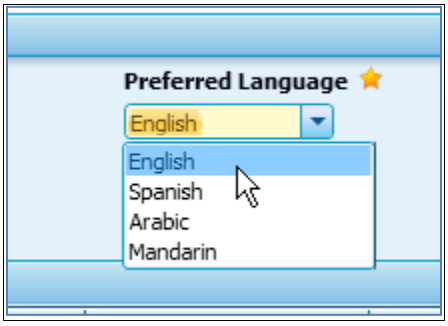
5. Select **Day of Week** for the search.

> The default setting is M – F selected. Add Sa or S, or deselect any work days, if applicable.

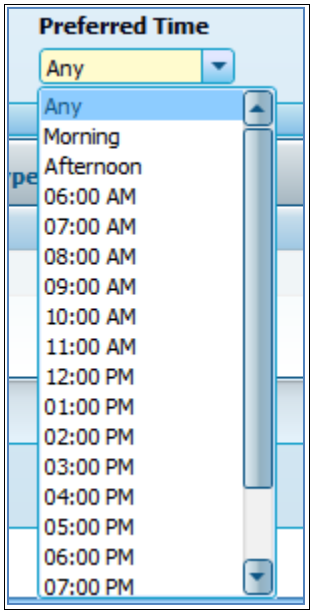
6. Check **Include Overbooking** if you wish the search to include appointment overbooking time slots.



7. Select the **Preferred Language**.

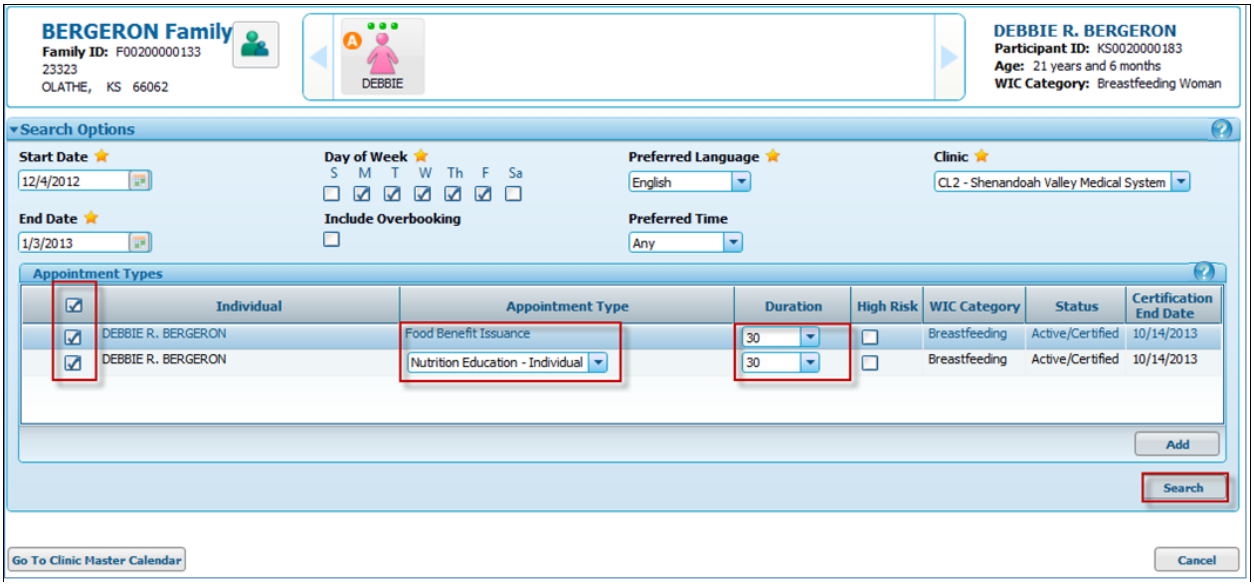


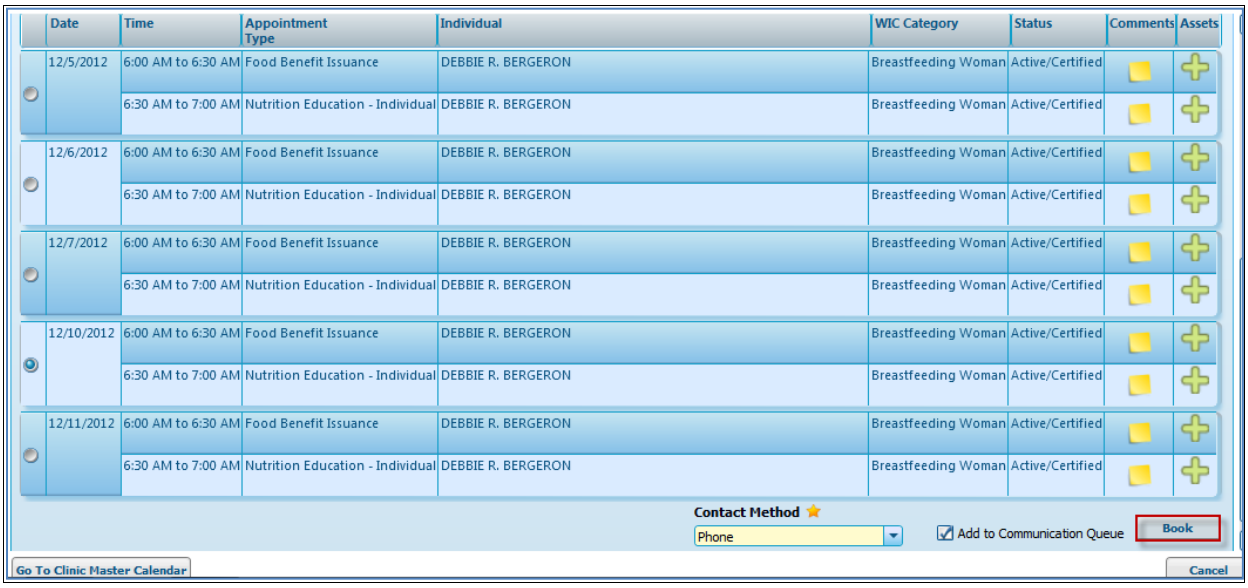
8. Select a **Preferred Time**, or select "Any" if any time is acceptable.



9. The **Clinic** is defaulted to your signed-in clinic. Select another clinic if applicable. Under **Appointment Types**, review the information for family. Change the **Appointment Type** or **Duration by clicking on the selected row and choose from the available drop down menu.** if necessary from the defaults.

10. Click **Search**. The **Quick Scheduling Results** displays.

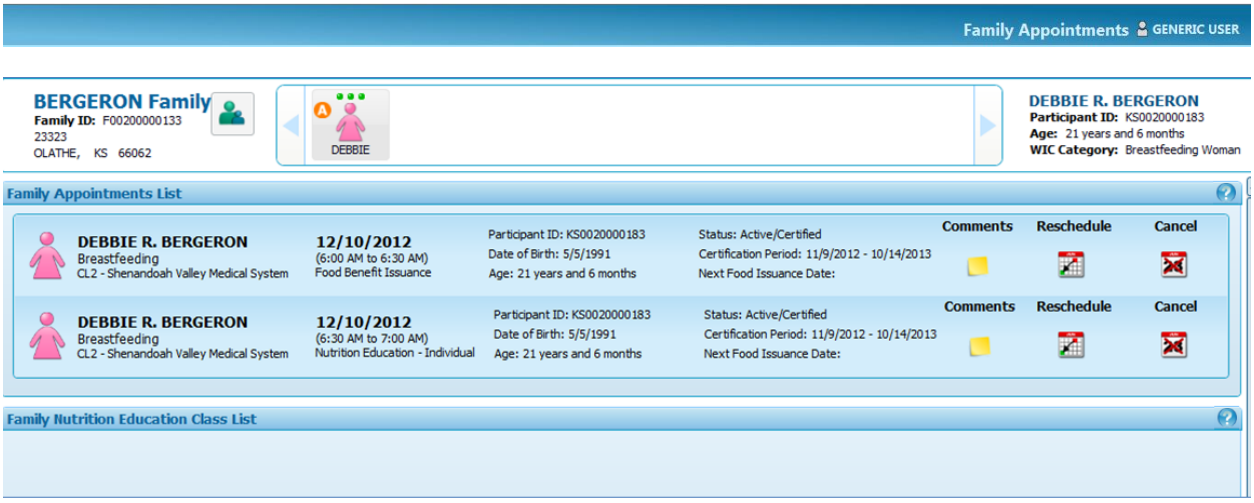




The Appointment Type grid defaults to selecting all family members for the search. The default Appointment Type is based on current system information. For example, Initial Certification is the default for new applicants. The Appointment Duration is the default duration, which is configurable, by Appointment Type selected. The duration can be changed based on an estimate of the total family appointment time. Click Add to add another family member Appointment type to the search.

11. Select a **Contact Method**.

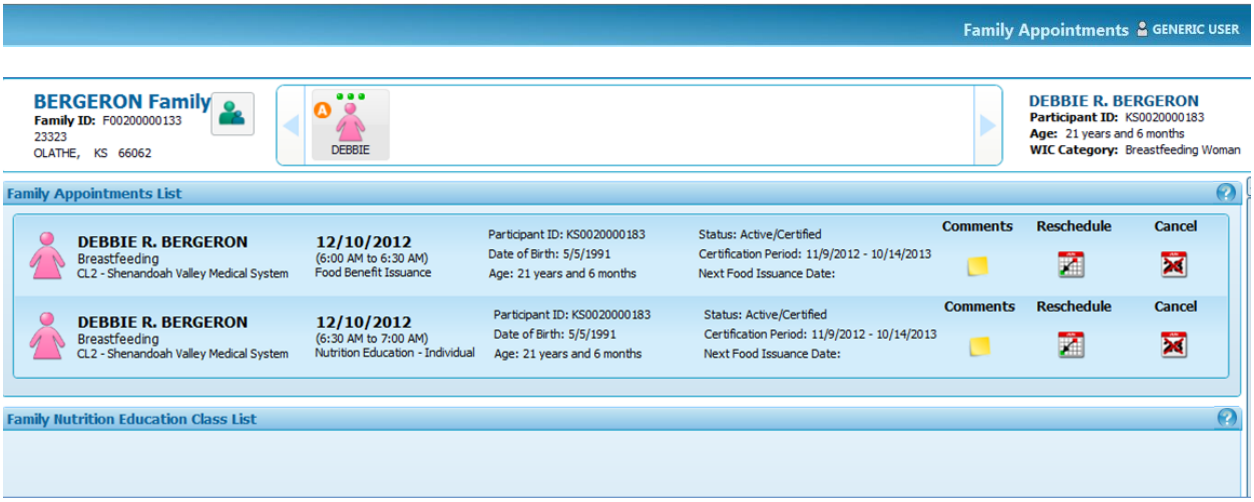
12. Click **Book**. A status message indicates the appointment was successfully scheduled. The **Family Appointments** screen displays.



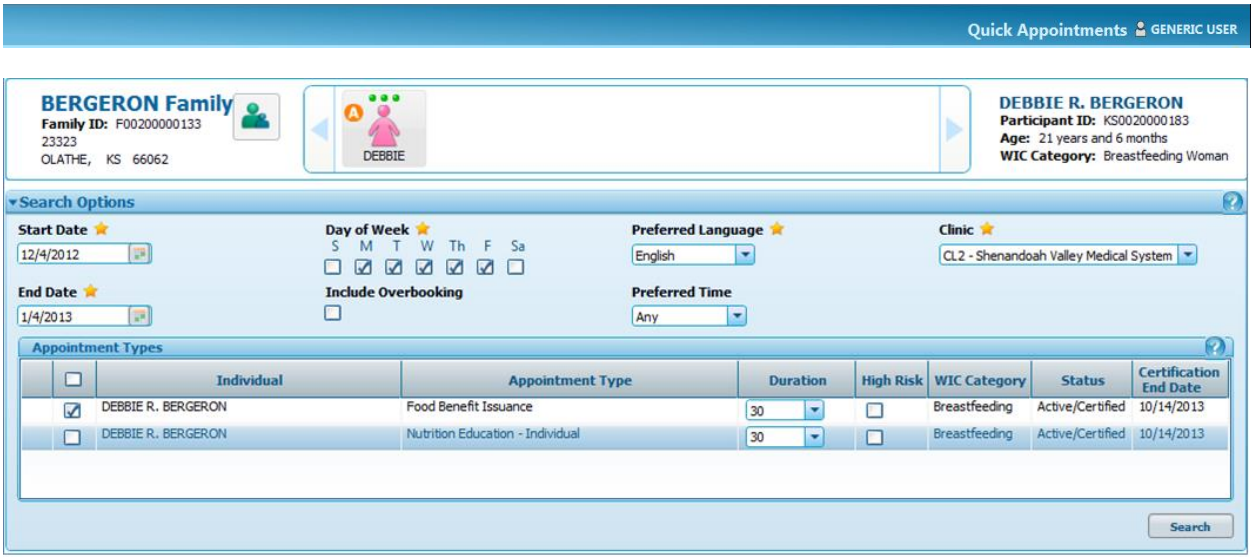
Task B. Rescheduling the Family Appointment

Complete the following steps to perform this task:

1. Conduct a search for the family and access the family record.
2. Go to **Quick Links → Scheduling→ Family Appointments**. The **Family Appointments** screen displays.

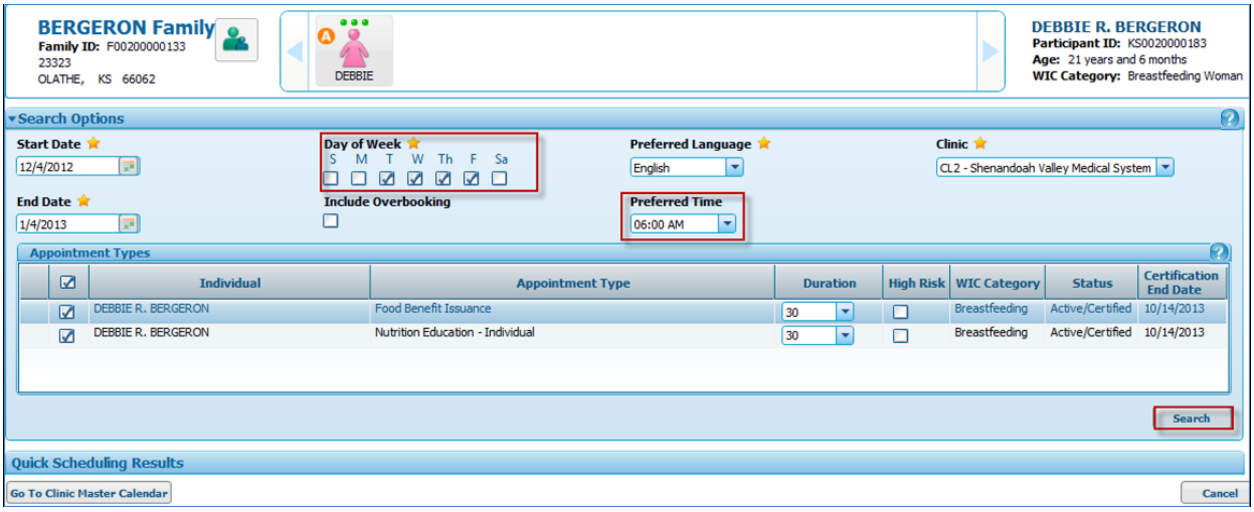


3. Click the **Reschedule** icon on a family member's appointment you wish to reschedule. The **Quick Appointment** screen displays.



When you click on one family member to reschedule, all family members with that same family appointment time displays on the Quick Appointment screen.

4. Enter the search criteria to find a suitable time for rescheduling. (Refer to this scenario under Scheduling a Family Appointment for details on selecting search criteria.)

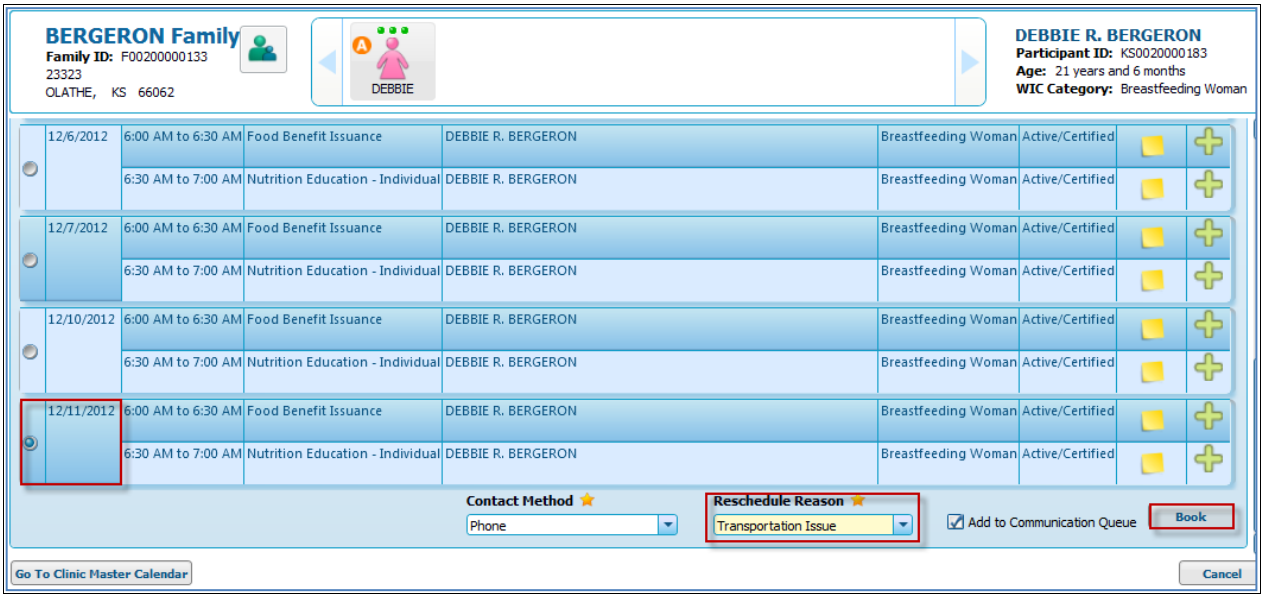


5. Click **Search**. The **Quick Scheduling Results** display.

6. Select an appointment time to reschedule.

7. Select a **Contact Method**.

8. Select a **Reschedule Reason**.



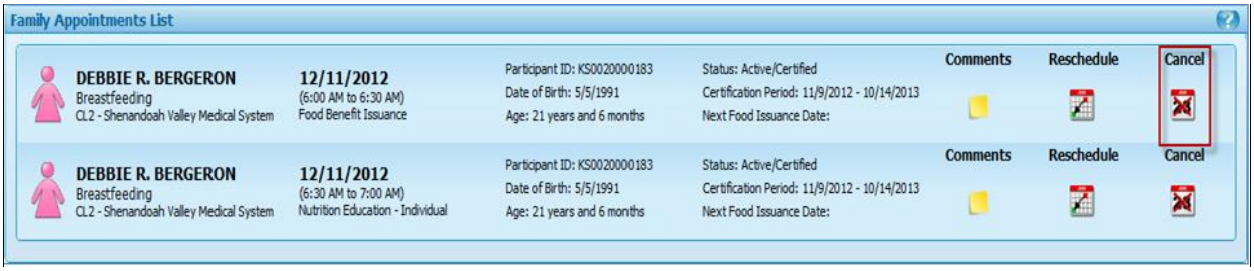
The Add to Communication Queue defaults as checked. This will send a notification to the family about the rescheduled appointment according to the state's methods of notification.

9. Click **Book** to reschedule. A status message indicates the appointment was successfully scheduled. The **Family Appointments** screen displays with the rescheduled date and time.

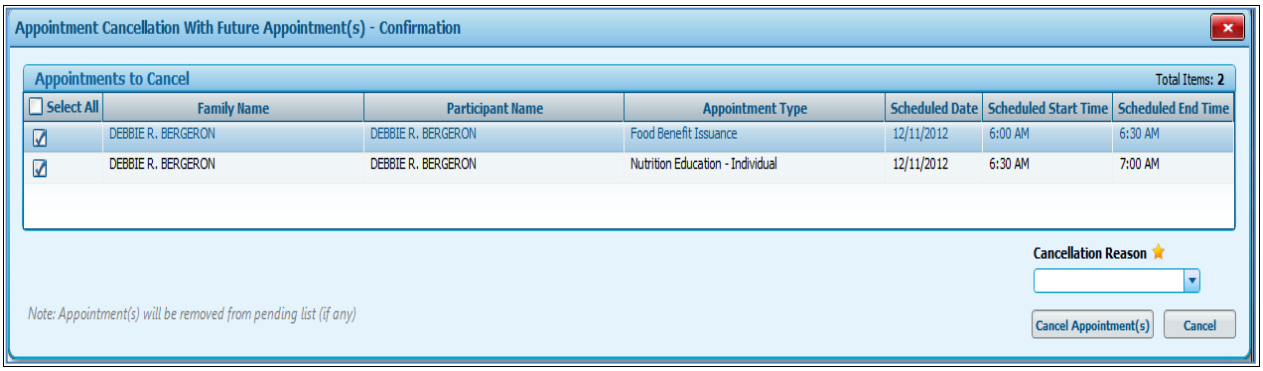
Task C. Canceling a Family Appointment

Complete the following steps to perform this task:

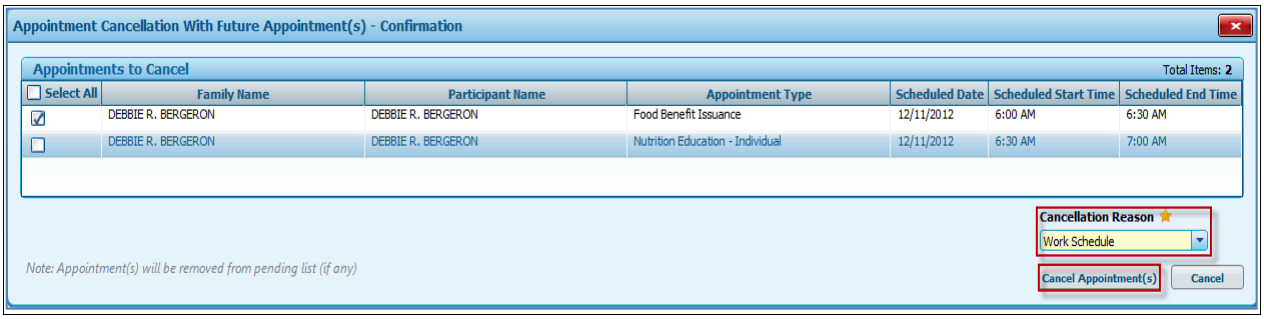
1. Conduct a search for the family and access the family record.
2. Go to **Quick Links → Scheduling→ Family Appointments**. The **Family Appointments** screen displays.

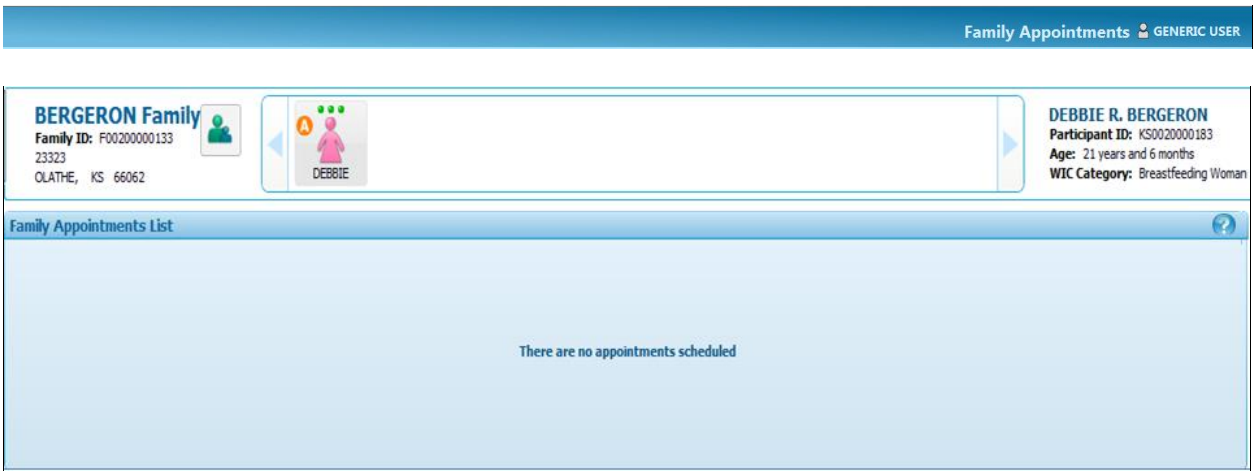


3. On the **Family Appointment List**, click the **Cancel** icon on a family member's appointment you wish to cancel. The **Cancel Appointment - Confirmation** popup screen displays.



4. Select the **Cancellation Reason**.
5. Click **Cancel Appointments**. A status message indicates success in cancelling the selected appointment(s). If there were no other appointments, the screen displays a message that no other appointments exists.





Congratulations!

You have successfully completed the **Scheduling System** process.

18- FOSTER CARE

Adding a Foster Family with Foster Children Only

This scenario explains the process of adding a new foster family with foster children only.

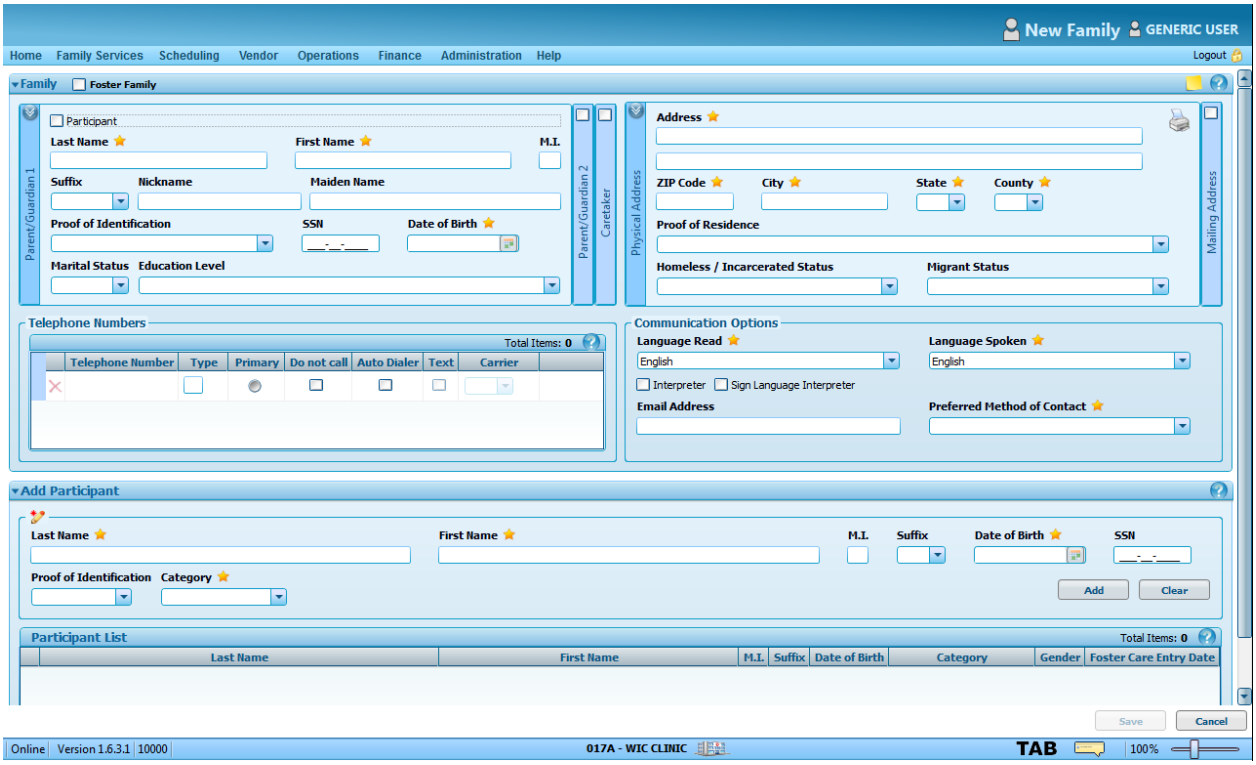
This process includes the following task(s):

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

Task A. Adding a New Foster Family Record (Foster Children Only) – Family Section

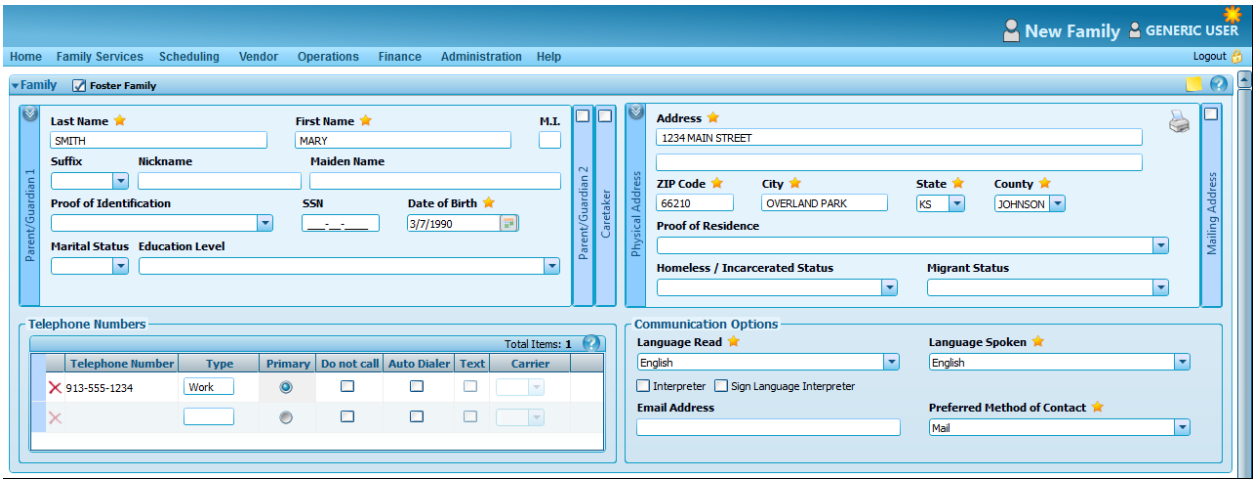
Complete the following steps to perform this task:

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



2. Complete the **Family** section of the **New Family** screen as you would when adding any family record with the exception of the following:

   - Check **Foster Family** to indicate the family is to consist of foster children only.



The Participant check box is hidden and unavailable for selection when Foster Family is selected.

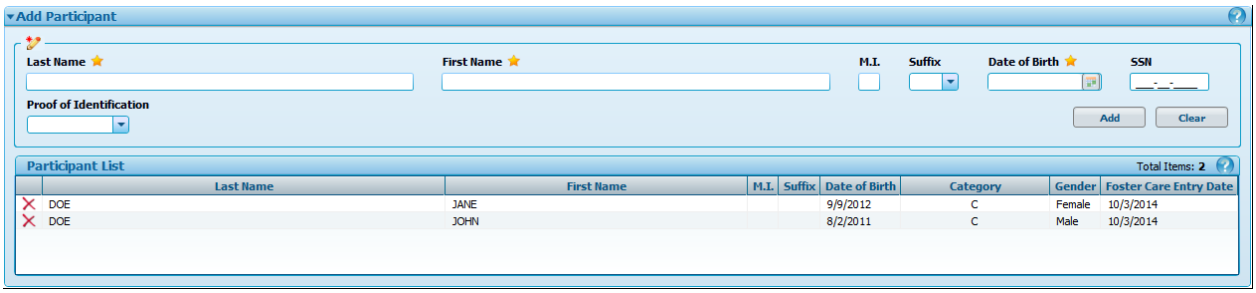
Task B. Adding a New Family Record – Participant Section

Complete the following steps to perform this task:

1. Complete the **Participant** section of the screen as you would when adding any family record with the exception of the following:
   a. Enter or select a **Foster Care Entry Date**.
   b. Select the **Proof of Foster Care**.

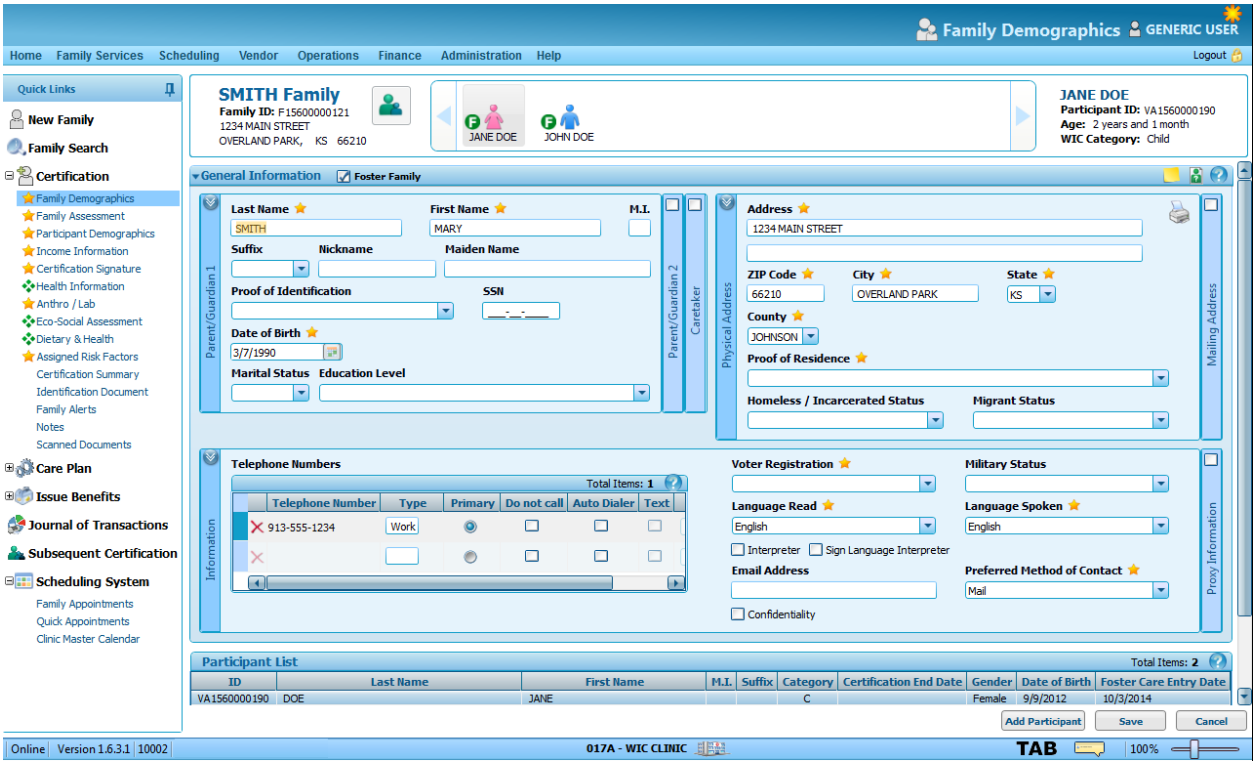
> Since Foster Family is selected under the Family section, the member is identified as a foster child automatically by the system and Foster Care Entry Date and Proof of Foster Care is required.

2. Click **Add**. The **Participant List** grid is refreshed and displays the foster child's name.



> Complete the previous Steps in this Task for each foster child that is to be included as part of this family record. Once the necessary children have been added to the Participant List grid, then proceed to the next Step.

3. Click **Save** to add the family record to the system. The **Family Demographics** screen displays.



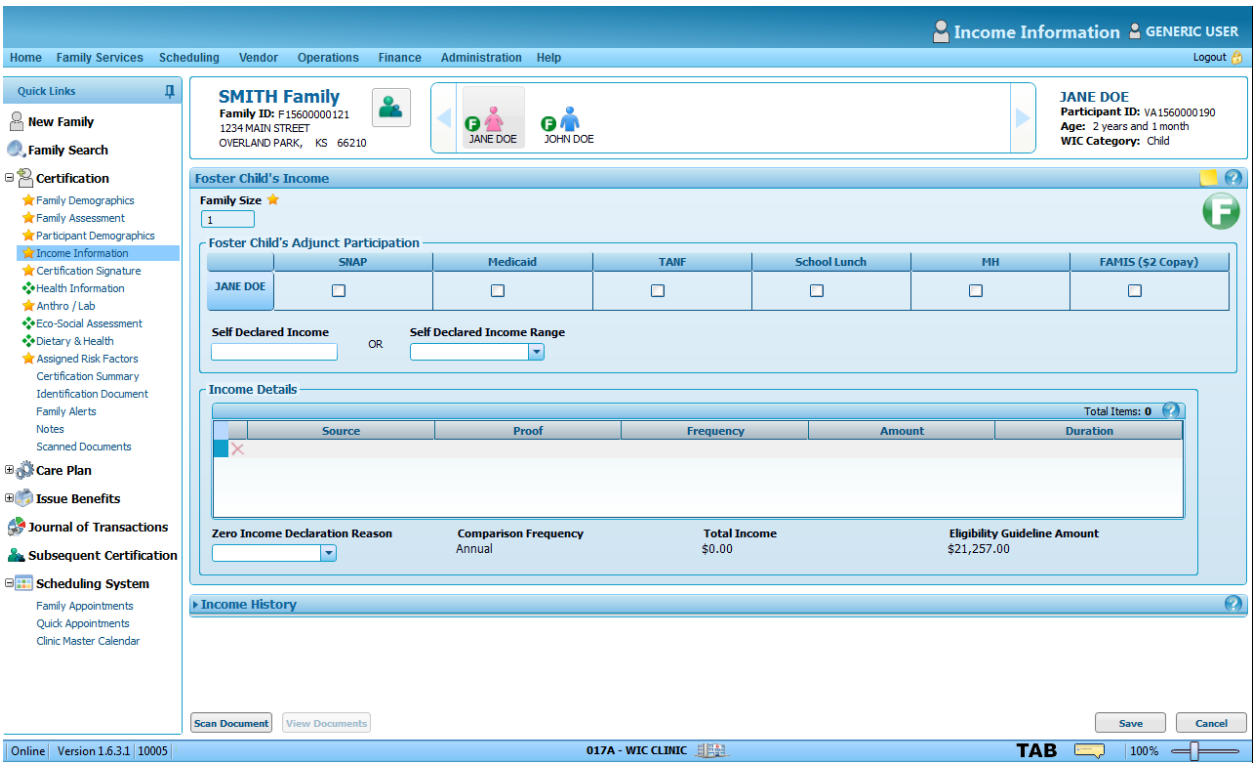
The Foster Indicator (F) displays on each foster child's icon in the Family Header indicating the member is a Foster Child.

There may be additional required items on this screen to complete before the screen itself is considered complete.

Task C. Completing the Income Information Screen

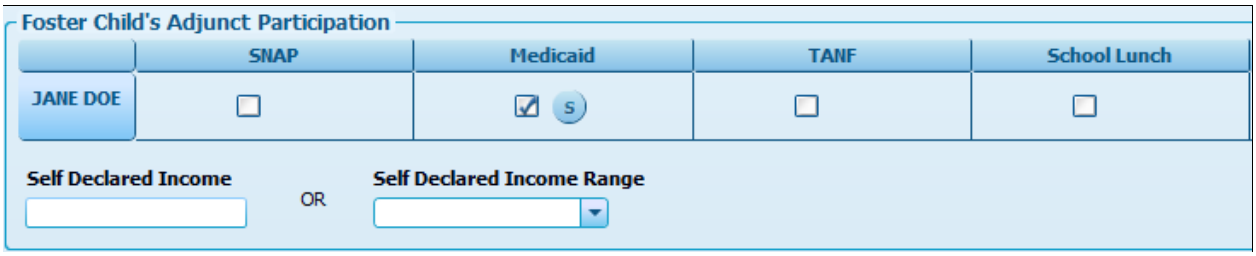
Complete the following steps to perform this task:

1. Go to **Family Services → Certification → Income Information**. The **Income Information** screen displays.



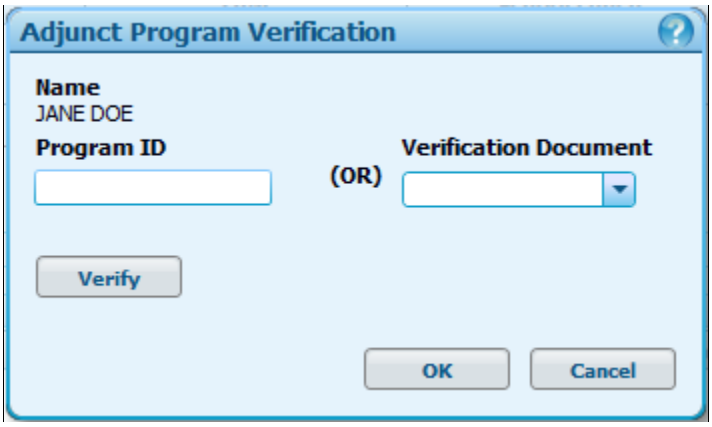
> Family Size should default to 1 automatically for each member due to the foster family situation. If this is not the case, you may have unintentionally missed a step in the process. Update the Participant Demographics screen for each child and indicate that he/she is a foster child. Once this has been done, return to the Income Information screen and finish the steps below.

2. Under **Foster Child's Adjunct Participation**, select all programs that apply.

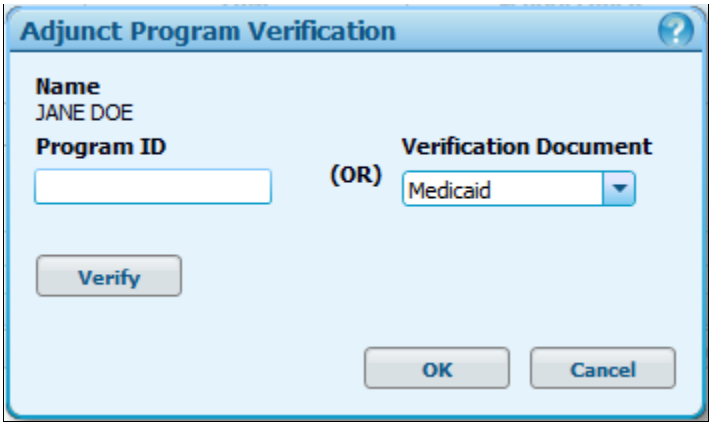


3. For each program selected, do the following:

   a. Click the **Adjunct Program Verification** button ( ). The **Adjunct Program Verification** screen displays.



   b. Enter the **Program ID** and click **Verify** or select a **Verification Document**.



   c. Click **OK** to process the screen. You are returned to the **Income Information** screen.

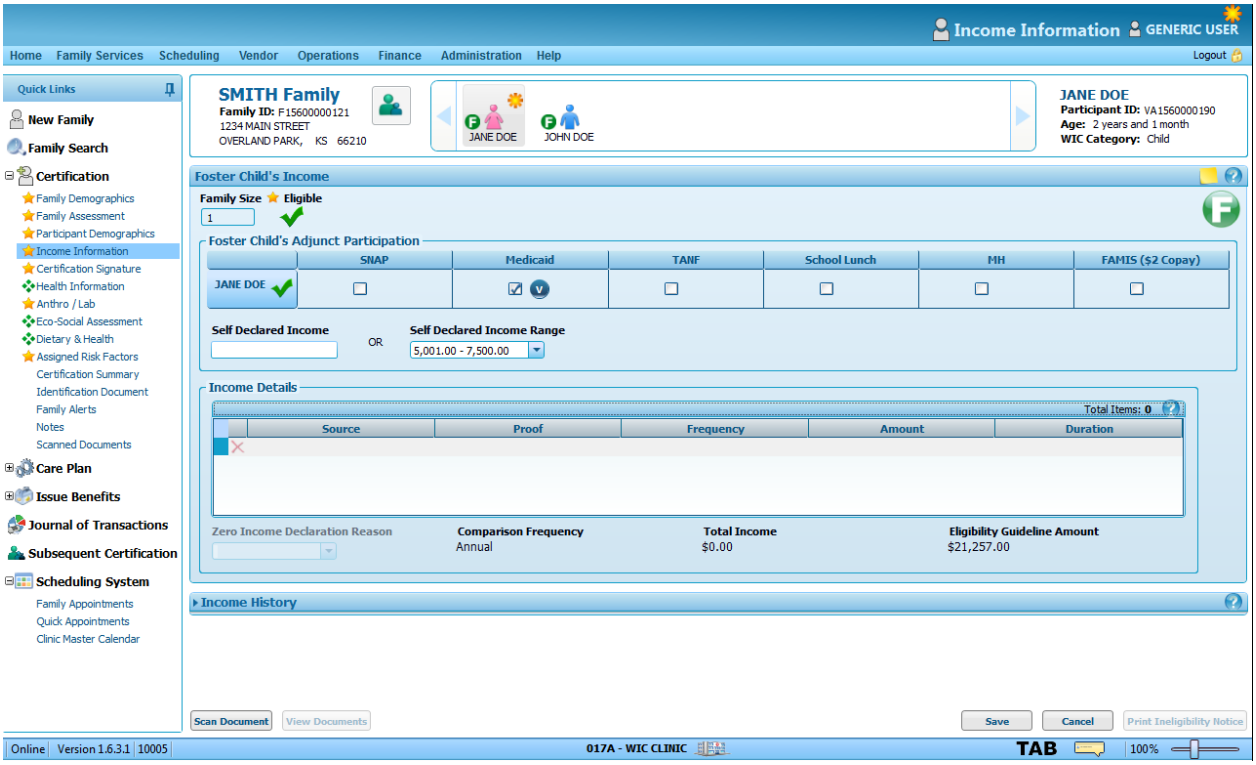
4. Do one or both of the following:

   a. Enter a **Self Declared Income**.

   b. Select a **Self Declared Income Range**.

> These options are available only if adjunct program participation is documented and then verified.

5. Complete the **Income Details** grid as necessary.



The Source column of the Income Details grid may include an option termed Foster Care Payments that can be used to document the receipt of this type of income.

Documenting any type of income (self-declared or income details) disables Zero Income Declaration Reason.

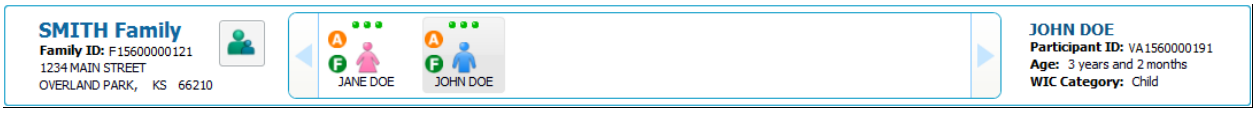
Remember to complete this task and its associated steps for every member of this foster family.

6. Click **Save** to process the screen. The next screen in the process displays.

Task D. Completing the Certification for Each Foster Child

Complete the following steps to perform this task:

1. Complete the remaining certification links for each member to finish the certification process.



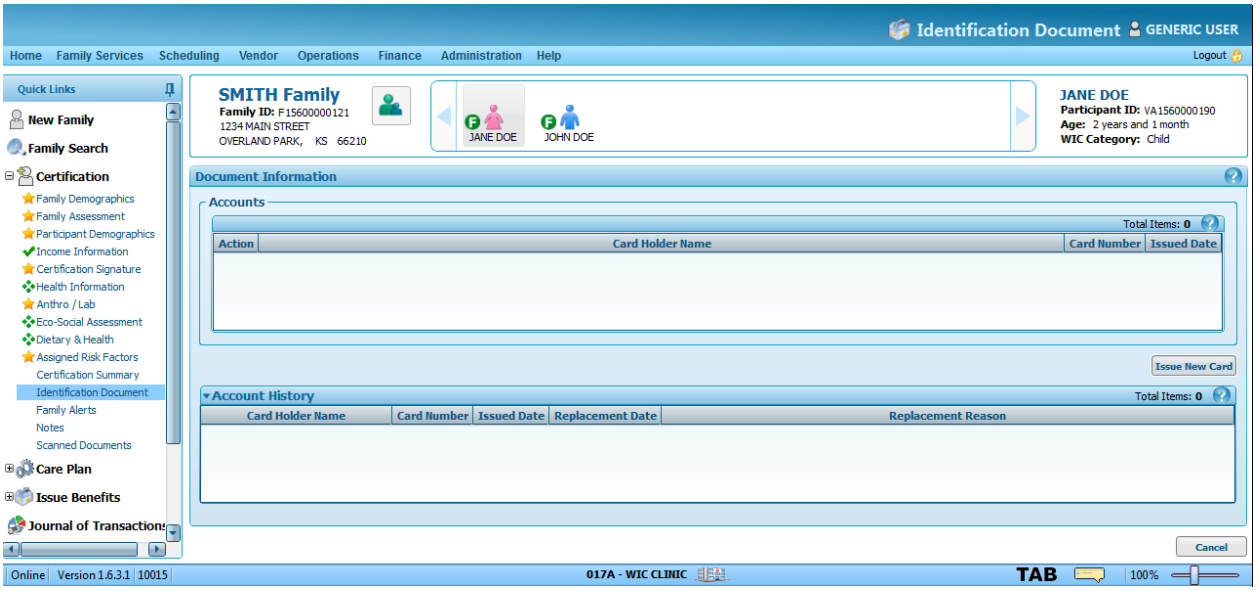
After the remaining certification links are complete, click the Certify button on the Certification Summary screen to complete the certification process for each member. An Active symbol (A) displays on each member's icon.

Task E. Issuing an Identification or EBT Card for Each Foster Child

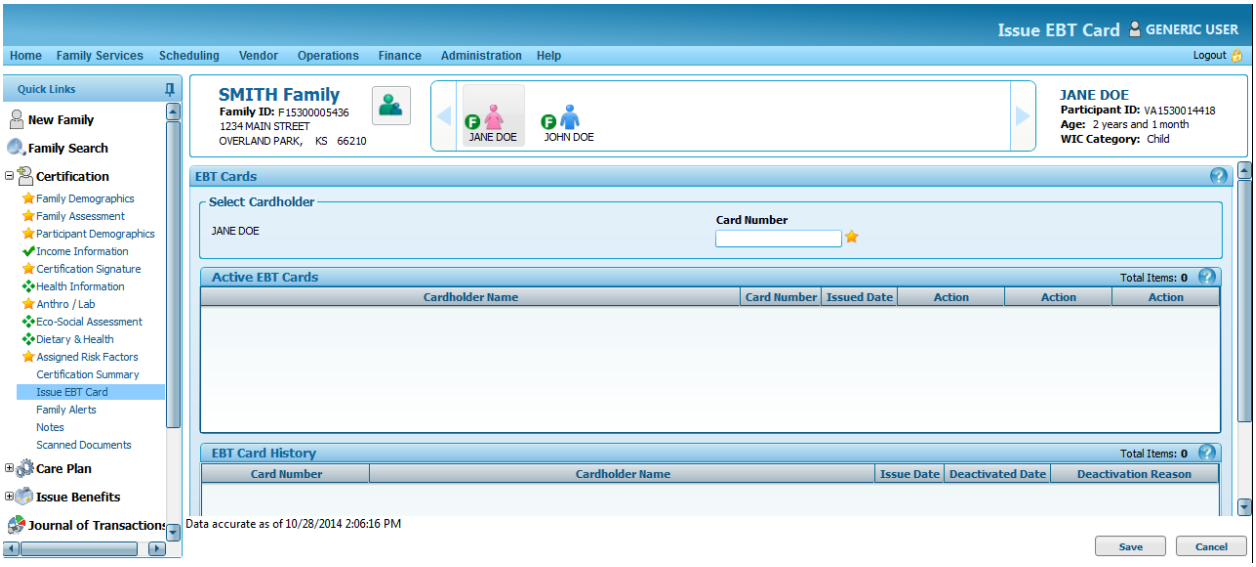
Complete the following steps to perform this task:

1. Go to **Family Services → Certification → Identification Document (or EBT Card)**. The **Identification Document (or Issue EBT Card)** screen displays.

   - Identification Document

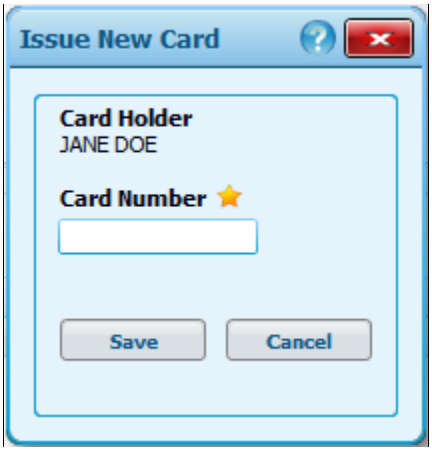


   - Issue EBT Card



2. Do one of the following:

- Click **Issue New Card** (to issue an ID card). The **Issue New Card** screen displays. Enter a card number and then click **Save**.



An identification document can be issued only after the certification has been completed.

A separate Identification Card needs issued for each foster child.

When issuing benefits, foster children benefits must be issued separately for each member. Select a member icon within the Family Header and issue the benefits. For each additional member, select their icon and then issue their benefits.

- Place the cursor within the **Card Number** text box. Enter an EBT card number or swipe an EBT card and then click **Save**.

A separate EBT Card needs to be issued for each foster child.

When issuing benefits, foster children benefits must be issued separately for each foster child. Select a foster child icon within the Family Header and then issue the benefits. For each additional foster child, select their icon and then issue their benefits.

Congratulations!

You have successfully completed the **Adding a Foster Family with Foster Children Only** process.

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

This scenario describes the process of adding a foster child to a non-family with other non-foster WIC members.

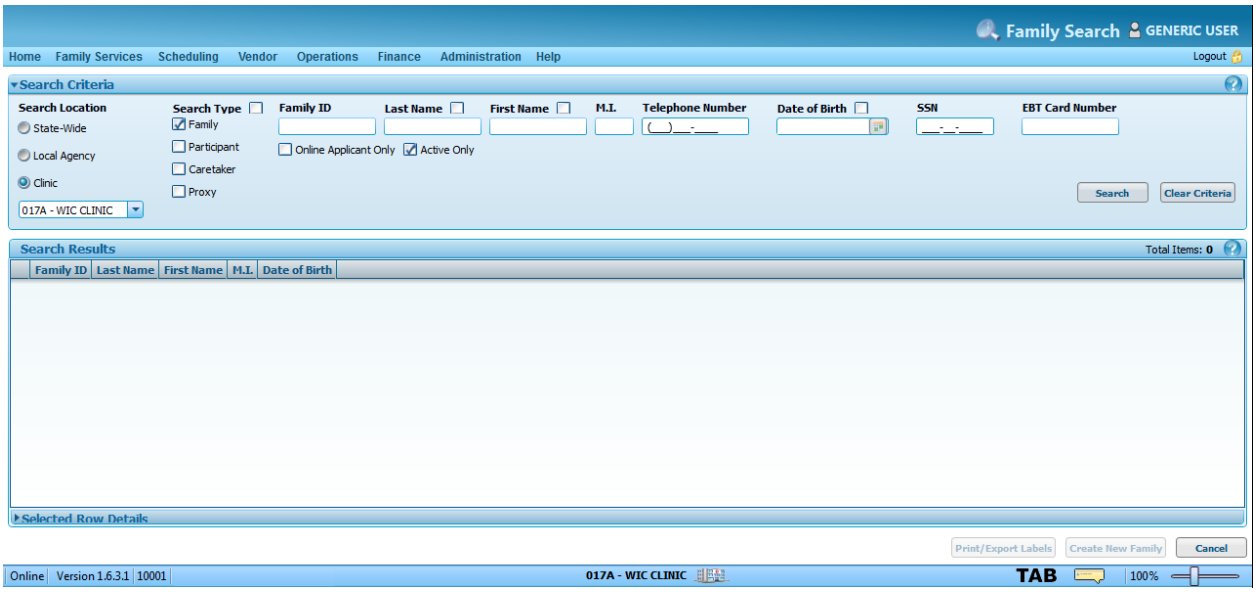
The process includes the following tasks:

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

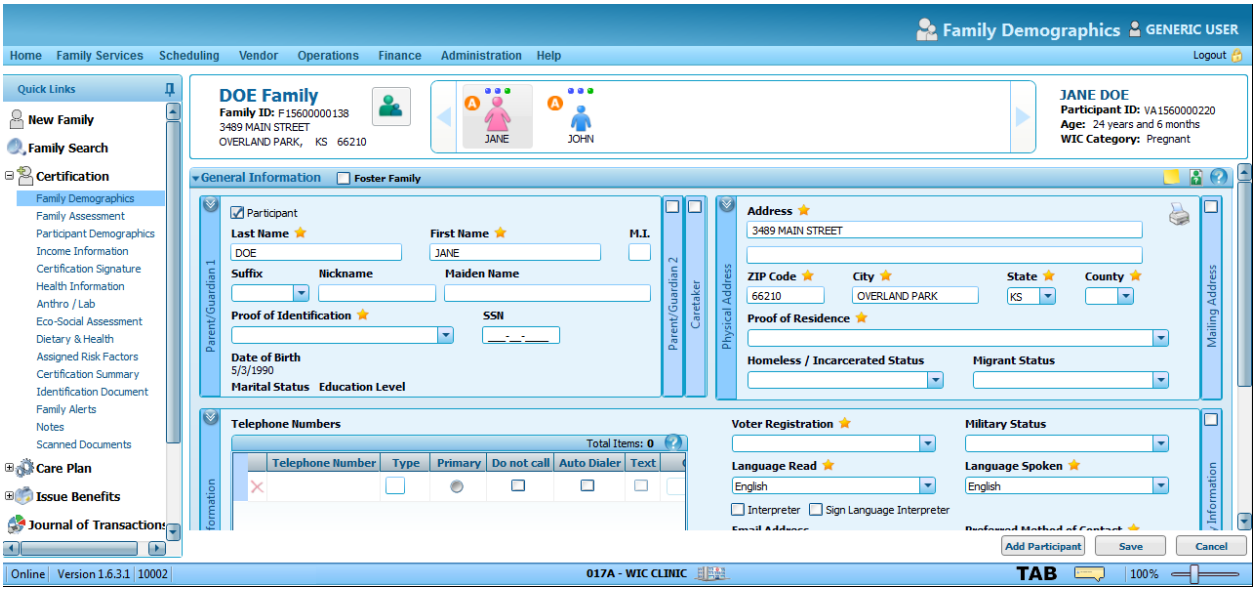
Task A. Adding a Foster Infant/Child to an Existing Non-foster Family

Complete the following steps to perform this task:

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



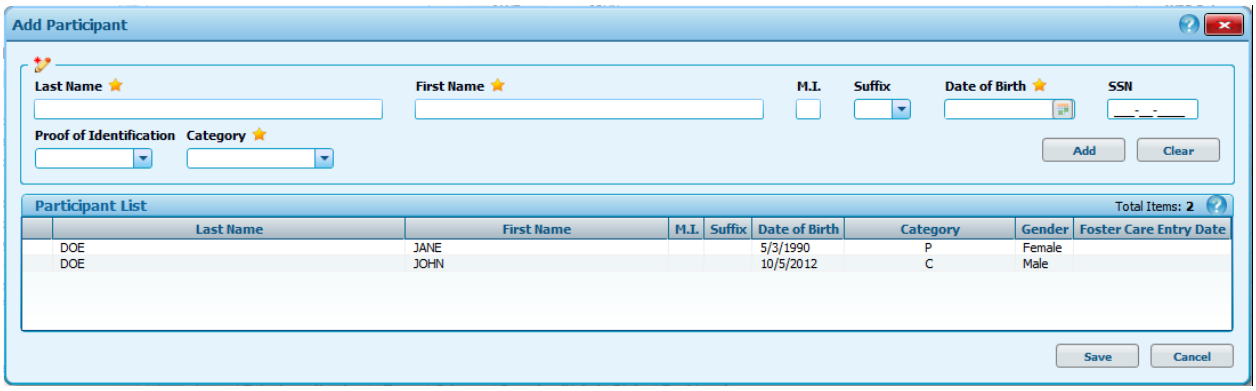
2. Search for and access the non-foster family record. The **Family Demographics** screen displays.



Task B. Adding a Foster Family Member – Participant Section

Complete the following steps to perform this task:

1. On the **Family Demographics** screen, click **Add Participant**. The **Add Participant** screen displays.



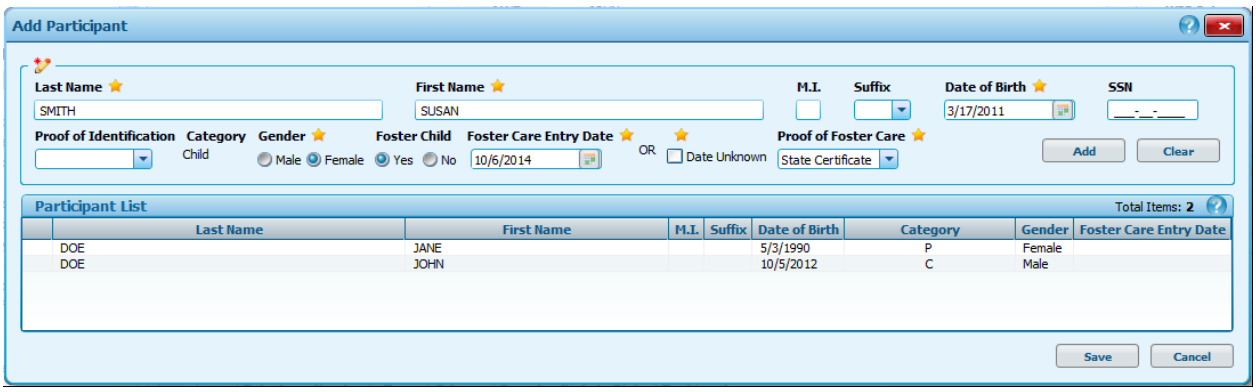
2. Complete the **Participant** section of the screen as you would when adding any member to a family record with the exception of the following:

   a. Select **Yes** for **Foster Child**.

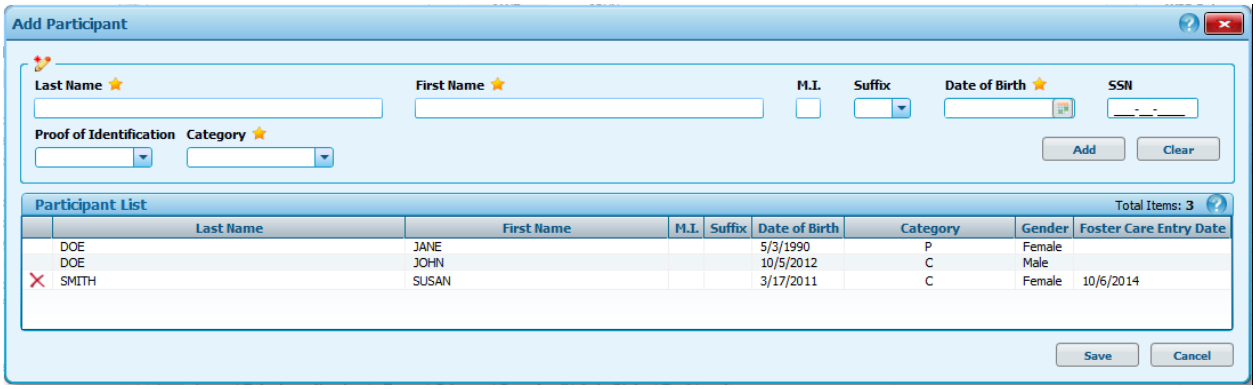
> Once the member is identified as a foster child, the screen is refreshed and displays two additional controls: 1) Foster Care Entry Date and 2) Proof of Foster Care.

   b. Enter or select a **Foster Care Entry Date**.

   c. Select the **Proof of Foster Care** or **Date Unknown**.

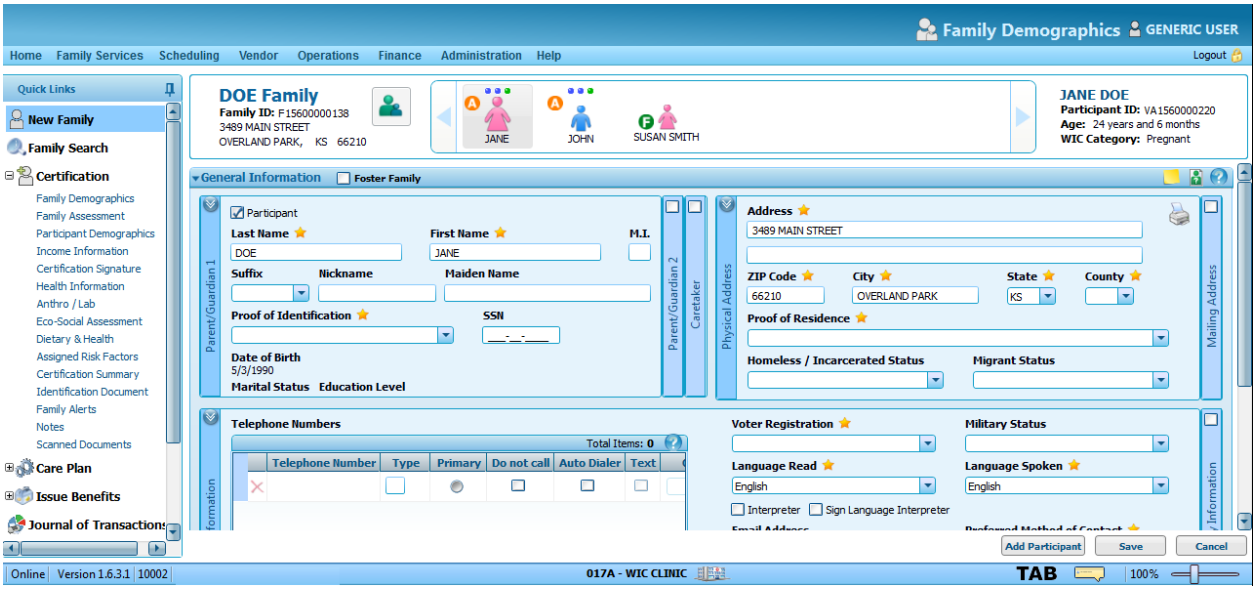


3. Click **Add**. The **Participant List** grid is refreshed and displays the foster child's name.



Complete the previous Steps in this Task for each foster infant/child that is to be included as part of this family record. Once each child has been added to the Participant List grid, then proceed to the next Step.

4. Click **Save** to process the screen. A status message displays indicating success and you are returned to the **Family Demographics** screen with each foster child having been added to the family header of the family record.



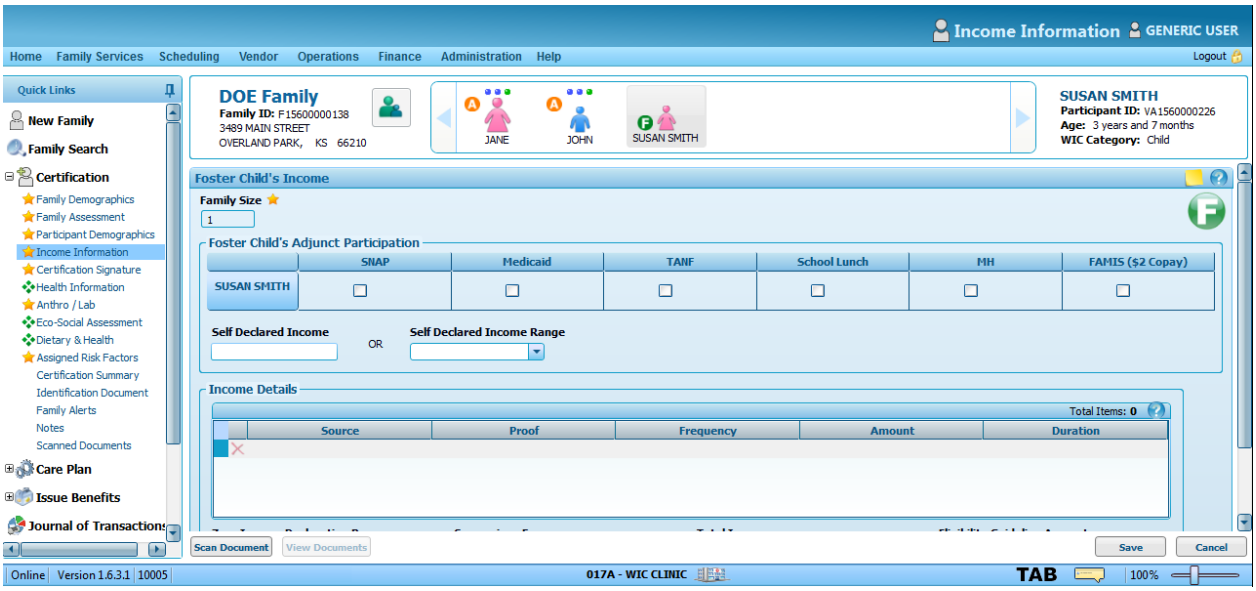
The Foster Indicator (F) displays on each foster child's icon in the family header indicating the member is a Foster Child.

Task C. Complete the Income Information Screen

Complete the following steps to perform this task:

1. Select the foster child in the **Family Header**.

2. Go to **Family Service → Certification → Income Information**. The **Income Information** screen displays.



3. Complete the **Income Information** screen as you would for any other family record with the exception of the following for the foster care member(s):

   a. Review the **Family Size**.

> Family Size is to display 1 automatically due the member being identified in a foster care situation. If this is not the case, you may have unintentionally missed a Step in the process. Update the Participant Demographics screen for each foster child and indicate that he/she is a foster child. Once this has been done, return to the Income Information screen and finish the Steps below.

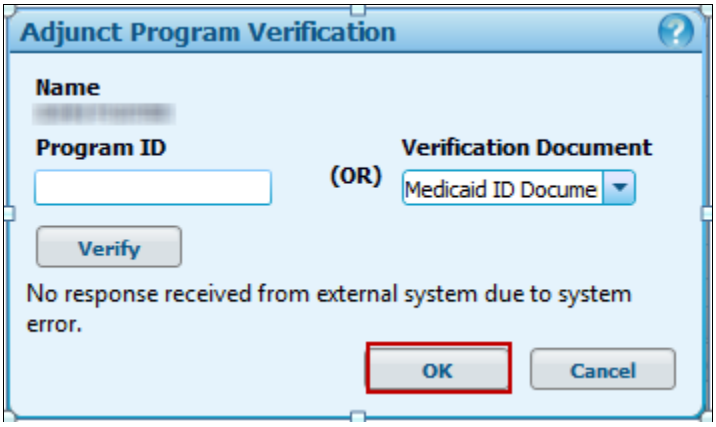
   b. Under **Foster Child's Adjunct Participation**, select all programs that apply.

   c. For each program selected, do the following:

      i. Click the **Adjunct Program Verification** button. The **Adjunct Program Verification** screen displays.

ii. Enter the **Program ID**.

iii. Click **Verify** or select the verification from the **Verification Document** drop down list.



iv. Click **OK** to process the screen. You are returned to the Income Information screen.

d. Do one or both of the following:

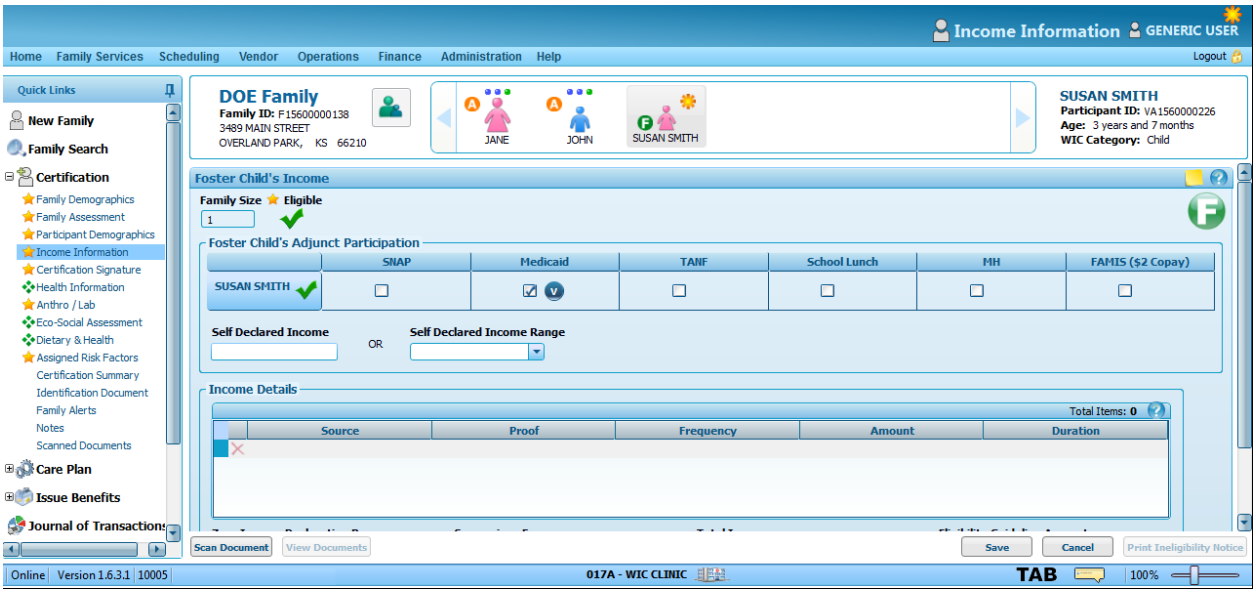
i. Enter a **Self Declared Income** or select a **Self Declared Income Range**.

These options are available only if adjunct program participation is documented and then verified.

ii. Complete the **Income Details** grid as necessary.

The Source column of the Income Details grid may include an option termed Foster Care Payments that can be used to document the receipt of this type of income.

Documenting any type of income (self-declared or income details) disables Zero Income Declaration Reason



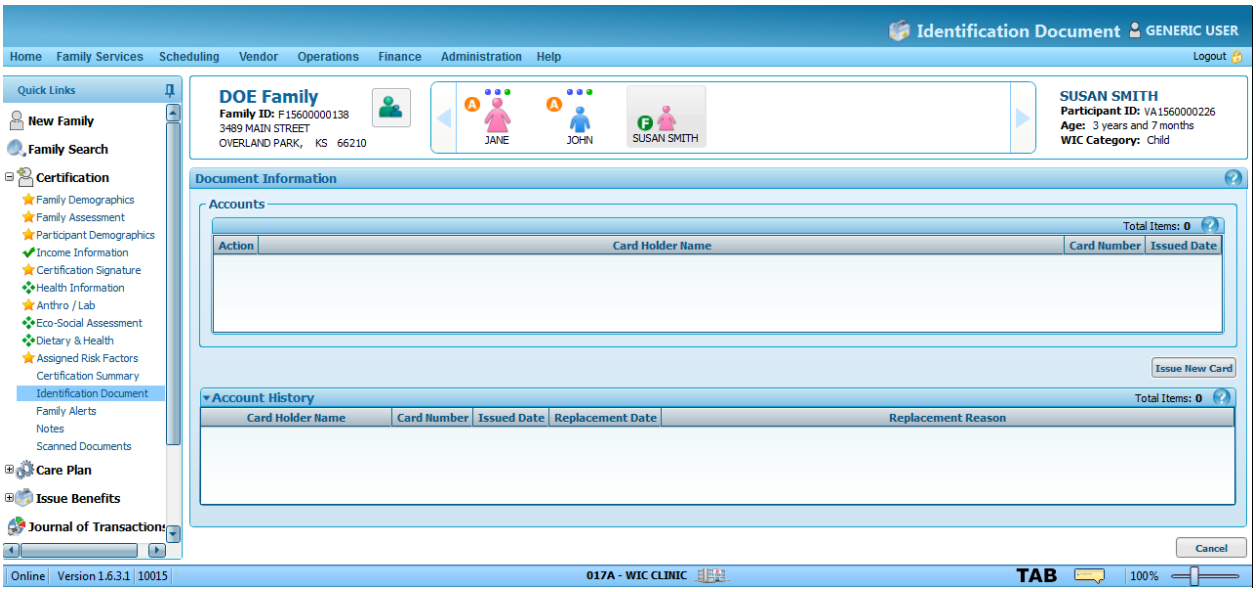
4. Click **Save** to process the screen. The next screen in the process displays.

Task D. Issuing an Identification Card (or an EBT Card)

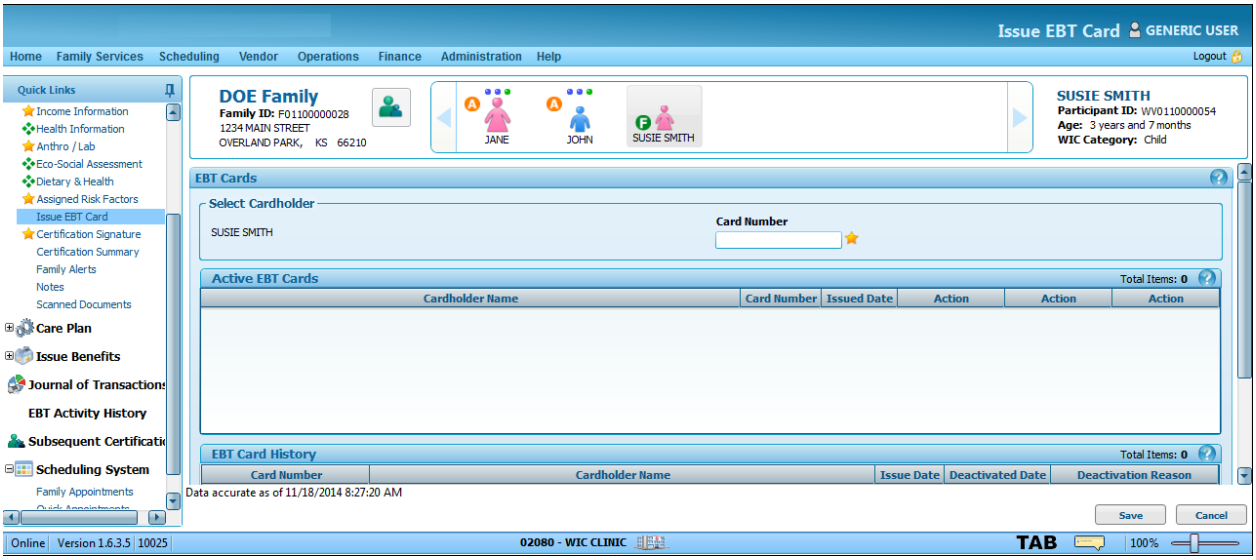
Complete the following steps to perform this task:

1. Go to **Family Service → Certification → Identification Document (or Issue EBT Card)**. The **Identification Document (or Issue EBT Card)** screen displays.

   - Identification Document



   - Issue EBT Card



The foster child's name is the only name listed within the Select Cardholder group box. The card is associated to that foster infant/child only. Therefore, it is necessary to issue each foster

infant/child a separate EBT card.

When setting up the EBT card PIN number for a foster infant/child, the system uses the foster infant/child's date of birth (DOB).

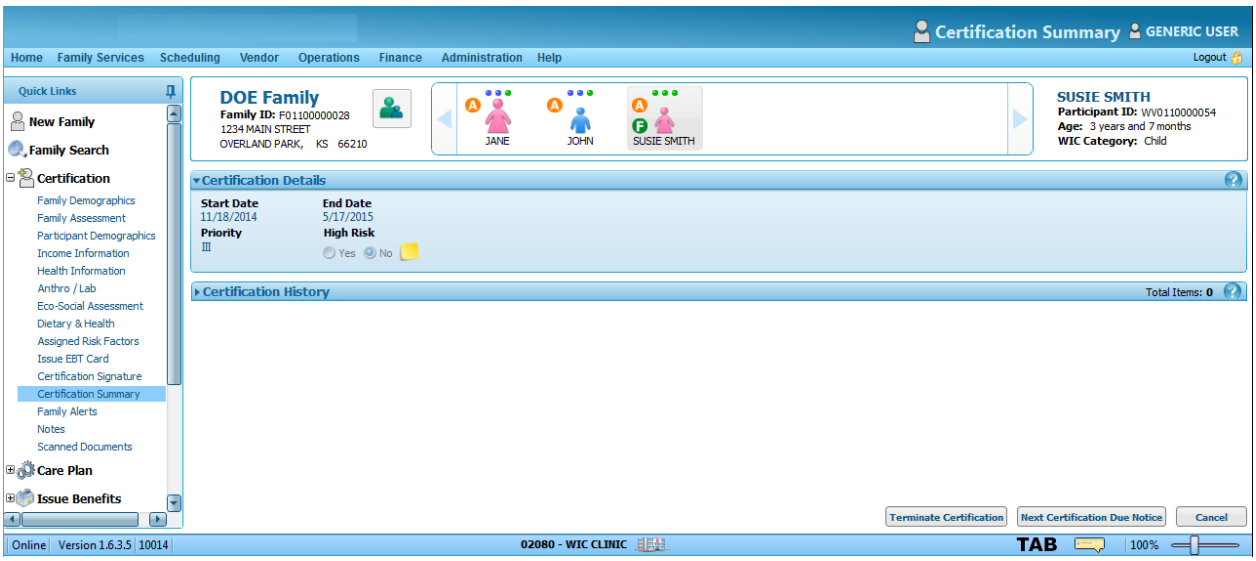
2. Issue an identification card or an EBT card to each foster child.

An individual Electronic Benefit Account (EBA) is created on the EBT provider site for foster infants/children. The account number for a foster infant/child is their Participant ID number.

Task E. Completing the Certification for Each Foster Child

Complete the following steps to perform this task:

1. Complete the remaining Certification links for each foster infant/child to finish the certification process and to make the infant/child active.

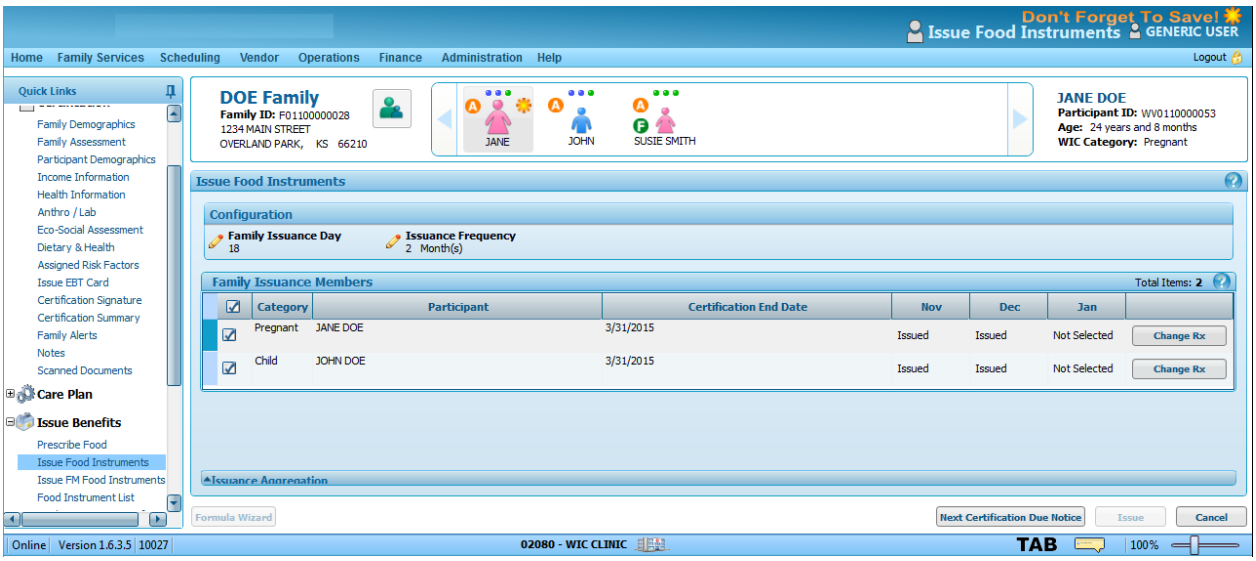


The rest of the certification process is the same as for the existing family. The user is reviewing and updating each screen for accuracy.

Task F. Issuing Benefits to a Foster Infant/Child

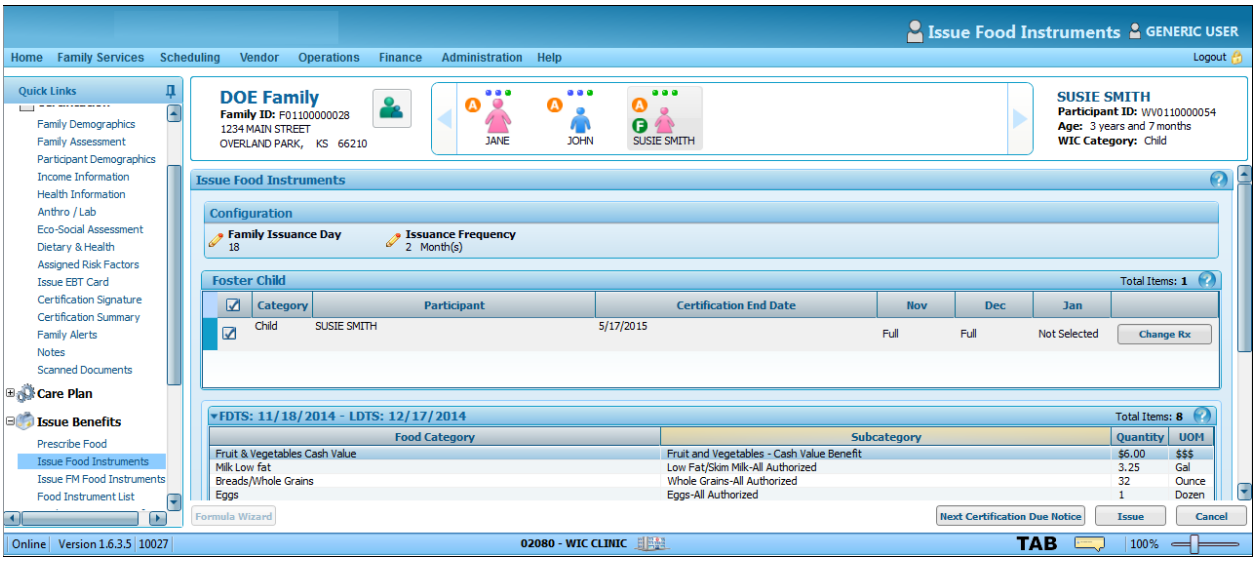
Complete the following steps to perform this task:

1. Go to **Family Services → Issue Benefits → Issue Food Instruments**. The **Issue Food Instruments** screen displays.



If a non-foster infant/child is selected when the user navigates to the Issue Food Instruments screen, only non-foster members of the family are listed within the Family Issuance Members grid. Non-foster members of the family and foster infant/children must be issued benefits separately.

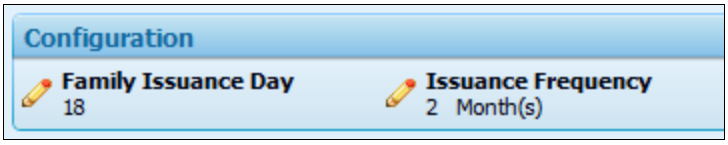
2. Select the foster infant/child icon within the **Family Header**. The screen refreshes and the **Foster Child** grid displays the name of the selected foster infant/child only.



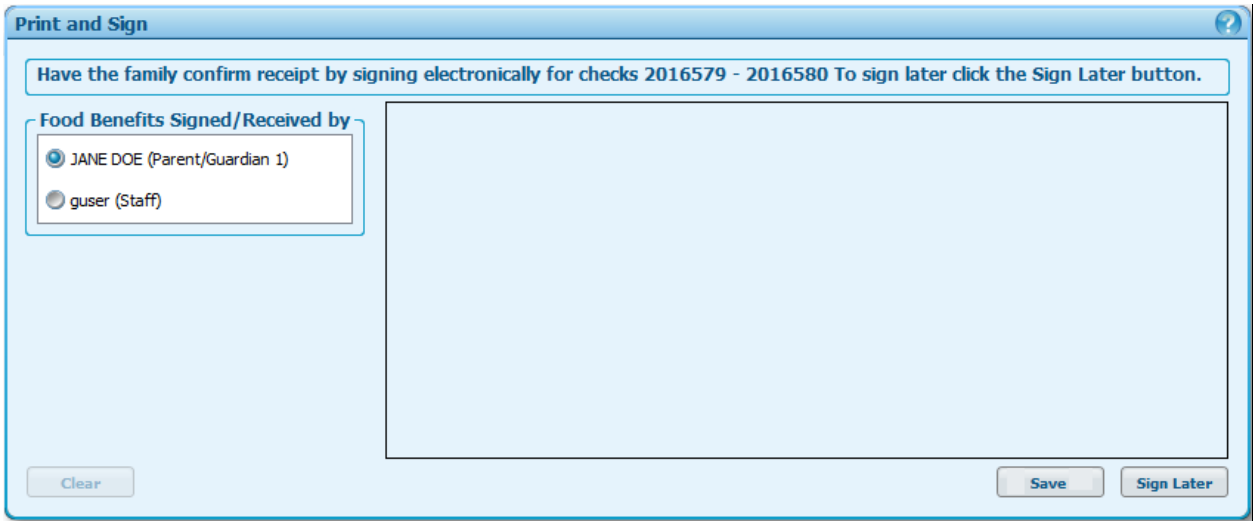
The Foster Child grid now displays the selected foster child's name.

Remember to assign a food prescription to the foster infant/child prior to attempting to issue benefits.

3. Review the Configuration container and edit the information is necessary.



4. Click **Issue**. The **Print and Sign** screen displays.



5. Direct the Parent, Guardian, or Caretaker to sign the electronic signature pad and then click **Save**.

Congratulations!

You have successfully completed the **Adding a Foster Infant/Child to a Non-foster** Family process.

Documenting Foster Care for an Existing Infant or Child

This scenario describes the process of documenting foster care for an existing member of a family. If an infant or child is being placed into foster care, he or she is removed from their biological family (or current foster care home) and placed into another family. There are a number of things to complete when this situation occurs and it is important to complete them in a specific order.

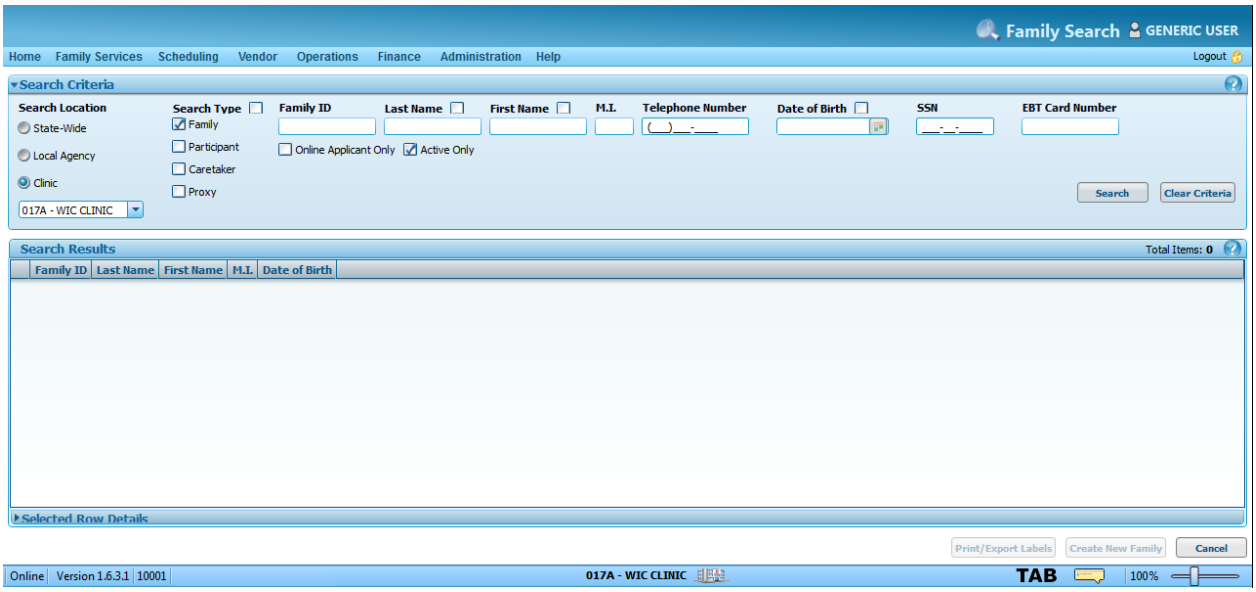
The process includes the following tasks:

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

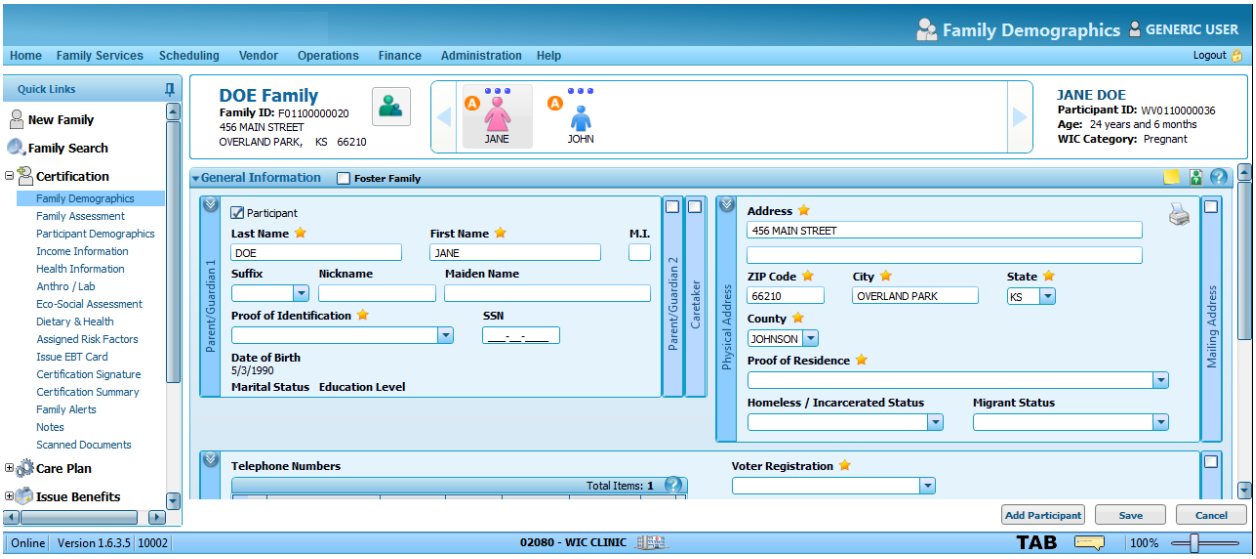
Task A. Access (or Open) the Family Record

Complete the following steps to perform this task:

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



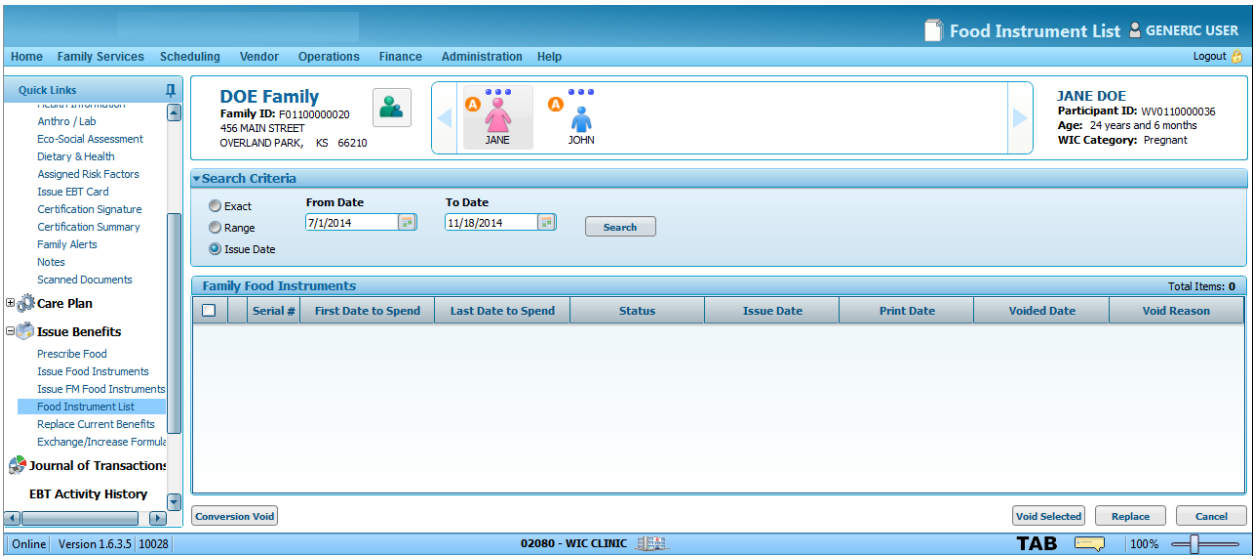
2. Search for and access the non-foster family record. The **Family Demographics** screen displays.



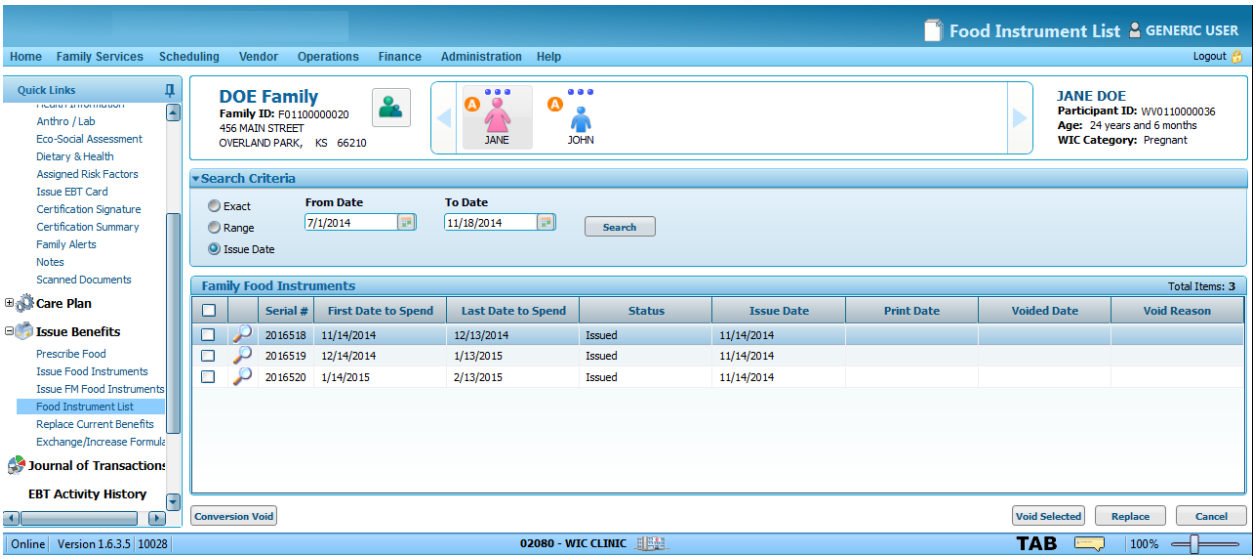
Task B. Voiding Future Benefits Prior to the Transfer

Complete the following steps to perform this task:

1. Go to **Family Services → Issue Benefits →Food Instrument List**. The **Food Instrument List** screen displays.



2. Click **Search**. The screen is refreshed and displays the benefits within the defined search range.



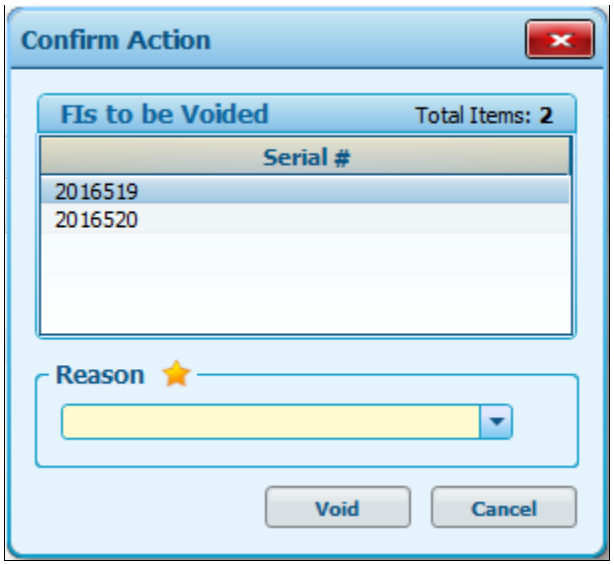
In the example above, both members benefits are aggregated (added together) for each month. The best practice is to void the future month's benefits prior to transferring members and then re-issue the benefits after the transfer has occurred.

3. Within the **Family Food Instruments** grid, select the future month's benefits.

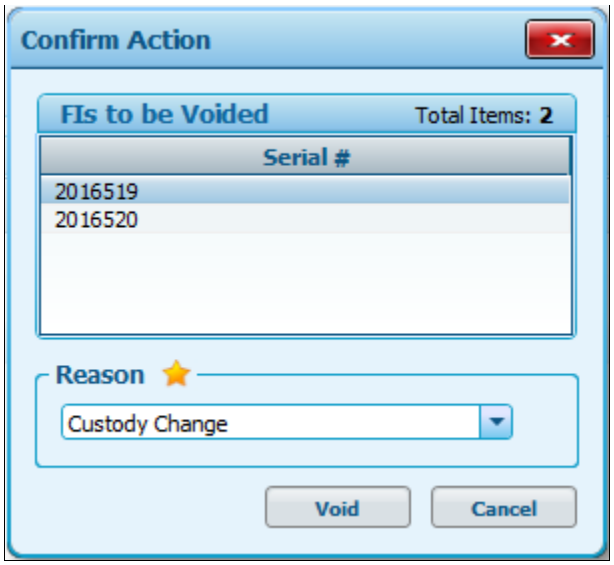
Family Food Instruments

		Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date
☐		2016518	11/14/2014	12/13/2014	Issued	11/14/2014
☑		2016519	12/14/2014	1/13/2015	Issued	11/14/2014
☑		2016520	1/14/2015	2/13/2015	Issued	11/14/2014

4. Click **Void Selected**. The **Confirm Action** screen displays.



5. Select the **Reason** for voiding the benefits.

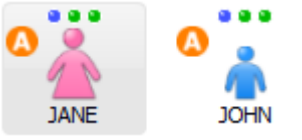


6. Click **Void**. A status message displays indicating success and the **Family Food Instruments** grid is updated.

Family Food Instruments — Total Items: 3

		Serial #	First Date to Spend	Last Date to Spend	Status	Issue Date	Print Date	Voided Date	Void Reason
		2016518	11/14/2014	12/13/2014	Issued	11/14/2014			
		2016519	12/14/2014	1/13/2015	Voided	11/14/2014		11/18/2014	Custody Change
		2016520	1/14/2015	2/13/2015	Voided	11/14/2014		11/18/2014	Custody Change

Each member icon is updated within the Family Header and indicates available for future benefit months. (Blue dots indicate issued while green dots indicate availability.)



7. Make note of the **First Date to Spend** date of the current family.

The First Date to Spend date(s) is driven by the Family Issuance Date associated to the family. In this example, notice how each month of benefits begins on the 14th of the month:

11/14/2014

12/14/2014

01/14/2015

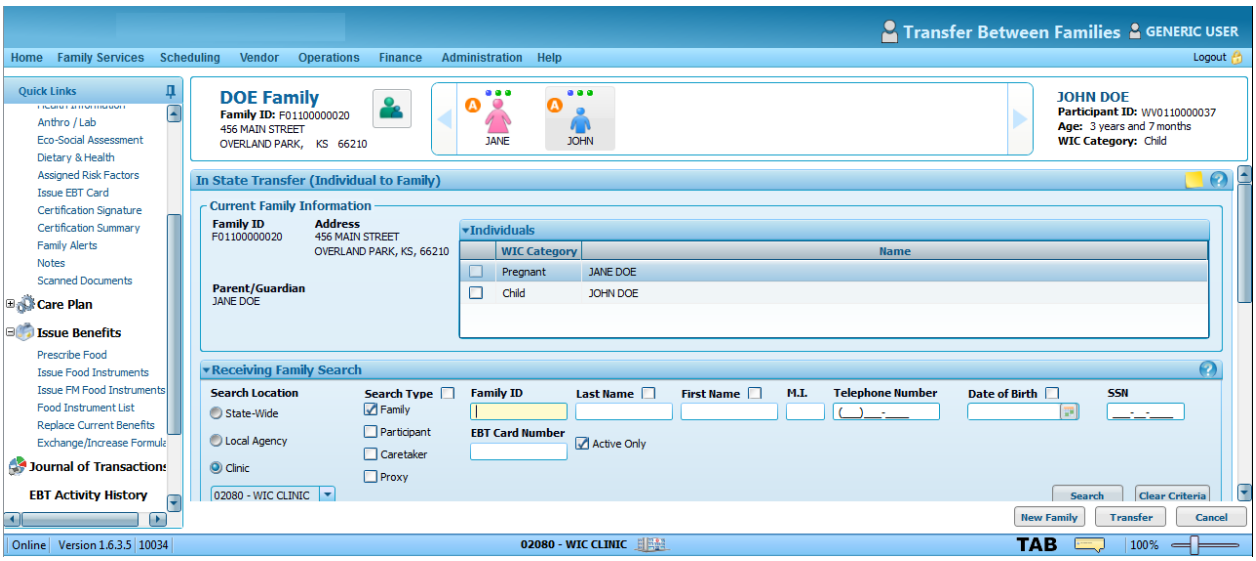
When the selected member(s) are transferred to the new family, it may be necessary to adjust the new family's Family Issuance Date to match the current family's Family Issuance Date to prevent gaps in the benefits.

The Family Issuance Day cannot be changed if there are any issued or redeemed benefits for the family with a Last Date to Use greater than the current system date (today's date).

Task C. Transferring the Infant/Child Being Placed into Foster Care

Complete the following steps to perform this task:

1. Go to **Family Services → Transfer → Between Families**. The **Transfer Between Families** screen displays.



2. Within the **Individuals** container, select the infant/child that is being placed into foster care and needs to be transferred out of the current family.

3. Complete the steps necessary to transfer the selected infant/child into a new or existing foster family record.

IMPORTANT: Both of the scenarios listed below provide instructions on how to re-issue future benefits. It is fine to re-issue future benefits to the original (biological) family members after the transfer, but do not re-issue future benefits to the foster infant/child yet. Additional information on when to do this is provided further along within this scenario.

For more detail on how to complete a transfer, consult one of the following scenarios:

Between Families: Transferring a Participant Between Two Existing Family Records

Between Families: Transferring a Participant Between Families – Existing to Newly Created Family

Task D. Documenting Foster Care for the Infant/Child

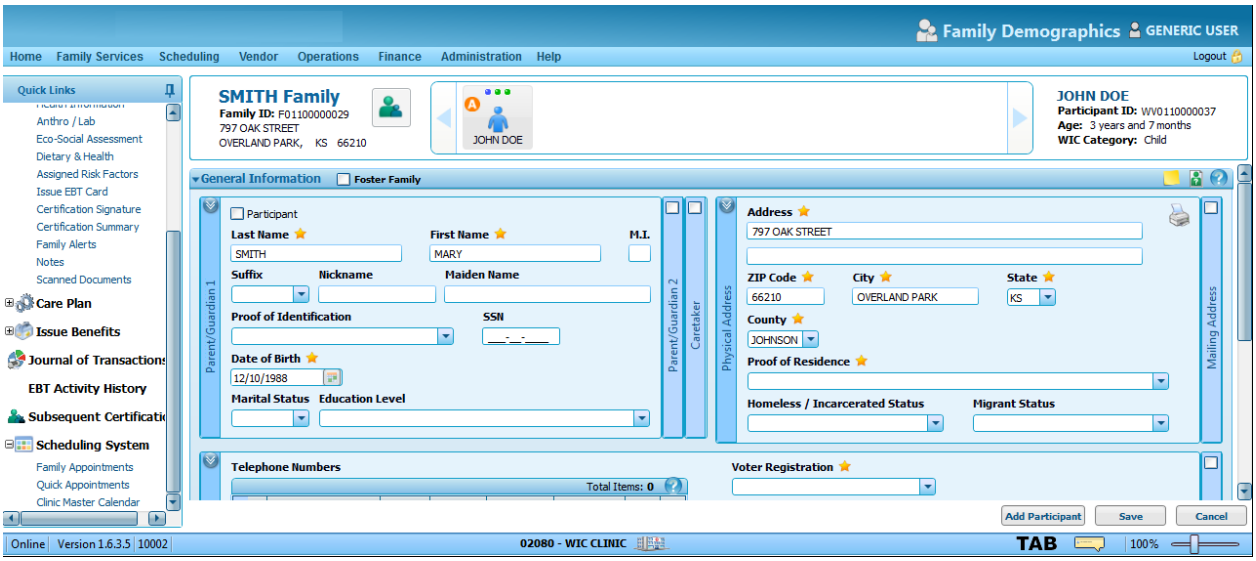
Complete the following steps to perform this task:

At this point in the process, the infant or child that is being placed into foster care should have been removed (transferred) from their biological family (or previous foster home) and should be associated to a new family record (their new foster home).

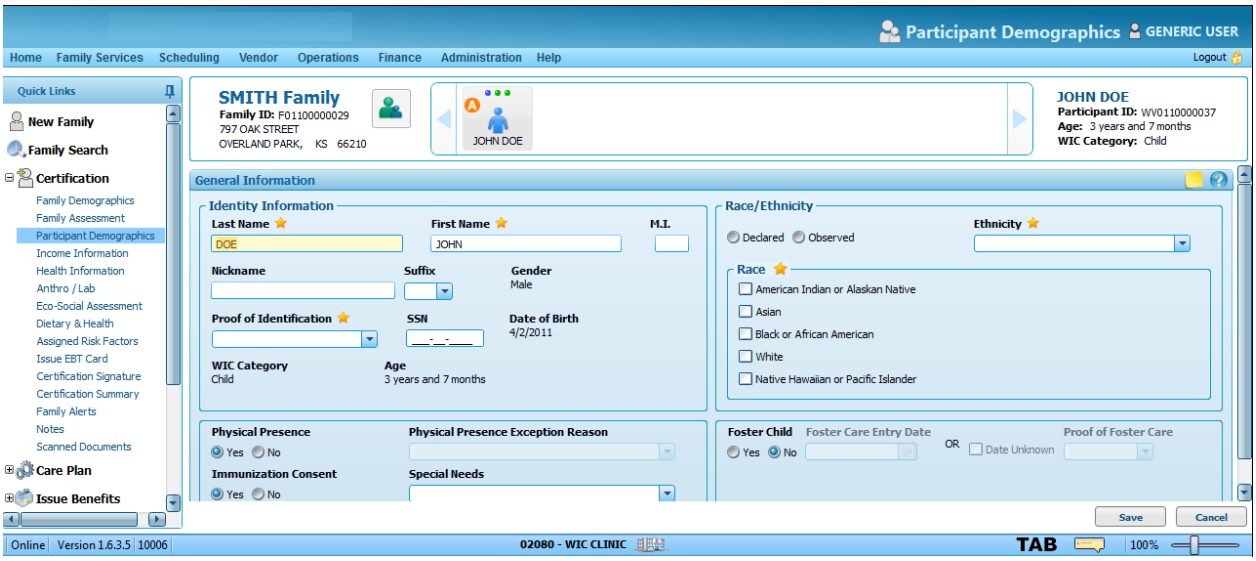
During the transfer process, any current benefits for the infant or child would have transferred to the new family record. Allow the foster mother to redeem these benefits. After these current benefits are redeemed (or expire), then it is time to document foster care for the infant or child. (When a user marks an infant or child as being in foster care, the system creates a separate Electronic Benefit Account (EBA) for the foster infant/child. If this had been completed prior to the transfer, no benefits would have transferred with the child to the new family. This is why it is important to document foster care after the transfer process is complete and not before the transfer takes place.

Once the current benefits are redeemed or expire, and once the infant or child has been marked as being in foster care, then it is time to re-issue the future benefits. Future benefits are then placed within the foster infant/child's EBA.

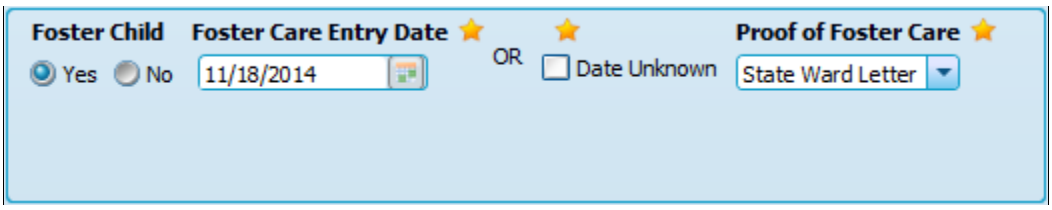
1. Access or open the family record that includes the foster infant or child. The **Family Demographics** screen displays.



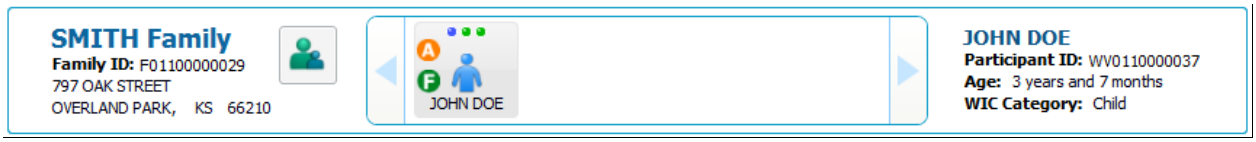
2. Go to **Family Services → Certification → Participant Demographics**. The **Participant Demographics** screen displays.



3. Complete the **Foster Child** group box (select Yes) and complete any other required fields on the screen.



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



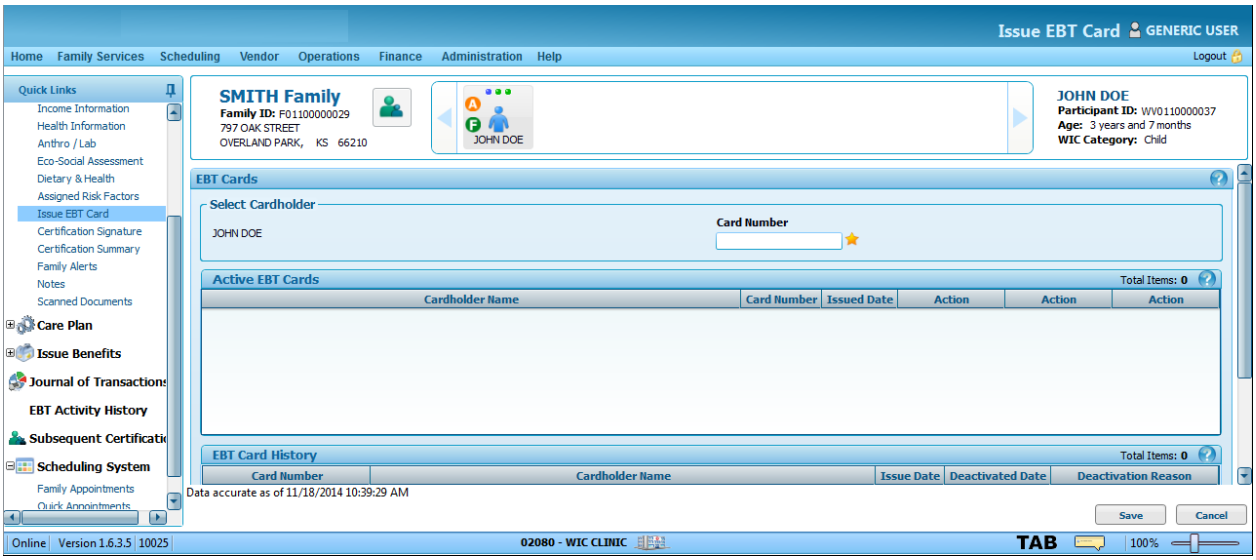
The Foster Indicator (F) displays on each foster child's icon in the family header indicating the member is a Foster Child.

An individual Electronic Benefit Account (EBA) is created on the EBT provider site for foster infants/children. The account number for a foster infant/child is their Participant ID number.

Task E. Issuing an EBT Card to the Foster Infant/Child

Complete the following steps to perform this task:

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



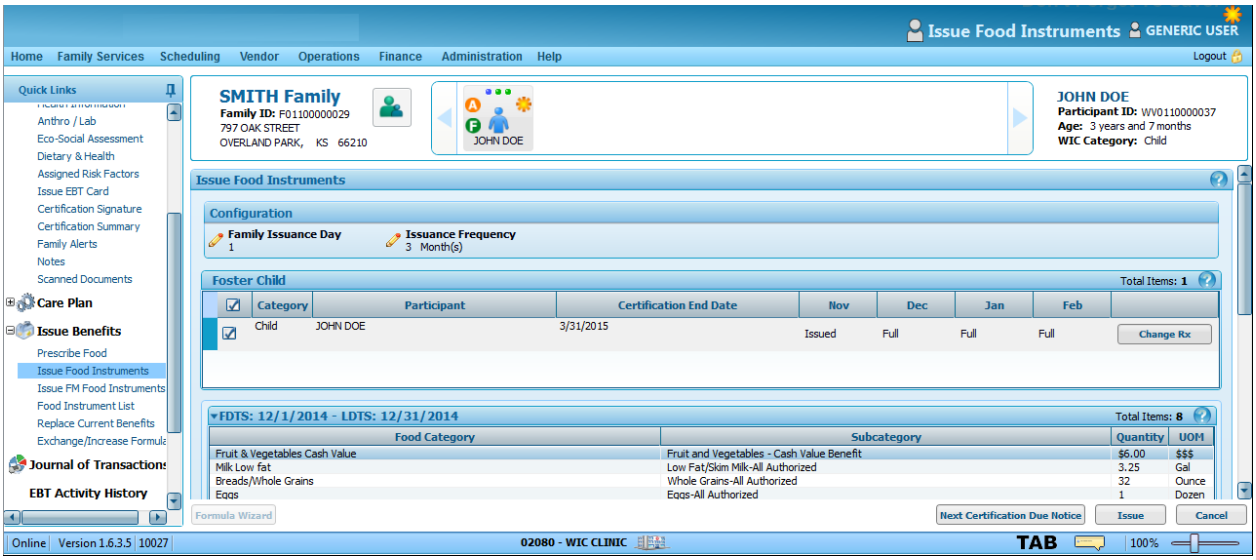
2. Issue an EBT card to the foster infant/child and then click **Save**.

> The foster child's name is the only name listed within the Select Cardholder group box. The card is associated to that foster infant/child only. Therefore, it is necessary to issue each foster infant/child a separate EBT card.
>
> When setting up the EBT card PIN number for a foster infant/child, the system uses the foster infant/child's date of birth (DOB).

Task F. Re-issuing Future Benefits to the Foster Infant/Child

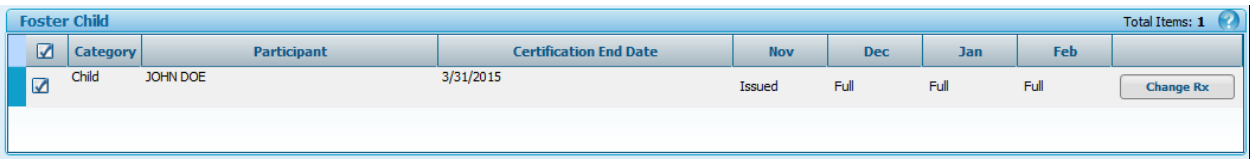
Complete the following steps to perform this task:

1. Go to **Family Services → Issue Benefits → Issue Food Instruments**. The **Issue Food Instruments** screen displays.



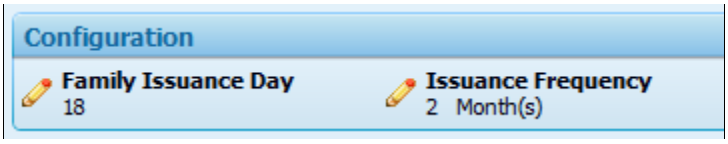
> If a non-foster infant/child is selected when the user navigates to the Issue Food Instruments screen, only non-foster members of the family are listed within the Family Issuance Members grid. Non-foster members of the family and foster infant/children must be issued benefits separately.

2. Select the foster infant/child icon within the **Family Header**. The screen refreshes and the **Foster Child** grid displays the name of the selected foster infant/child only.

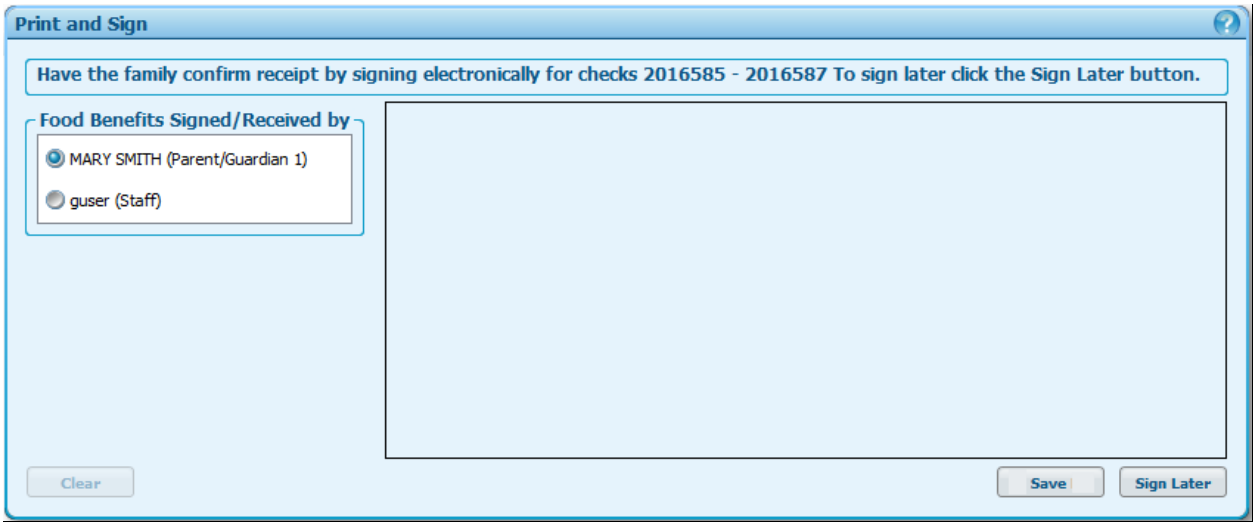


> The Foster Child grid now displays the selected foster child's name.

3. Review the Configuration container and edit the information is necessary.



4. Click **Issue**. The **Print and Sign** screen displays.



5. Direct the Parent, Guardian, or Caretaker to sign the electronic signature pad and then click **Save**.

Congratulations!

You have successfully completed the **Documenting Foster Care for an Existing Infant or** Child process.

19- MISCELLANEOUS TASKS

Issuing/Replacing an Identification Document

This scenario explains two similar processes. The process covers both issuing or replacing WIC identification documents and cards. Each process consists of only one task and a limited number of steps. However, the steps for each task are slightly different. Therefore, each process is documented separately below. Decide which process you wish to complete and review its associated information. This document is not part of the EBT process, but is utilized as the Family Identification document linked to your participant record. This unique identification number will be used to access the participant record during their clinic visit.

This process includes the following task(s):

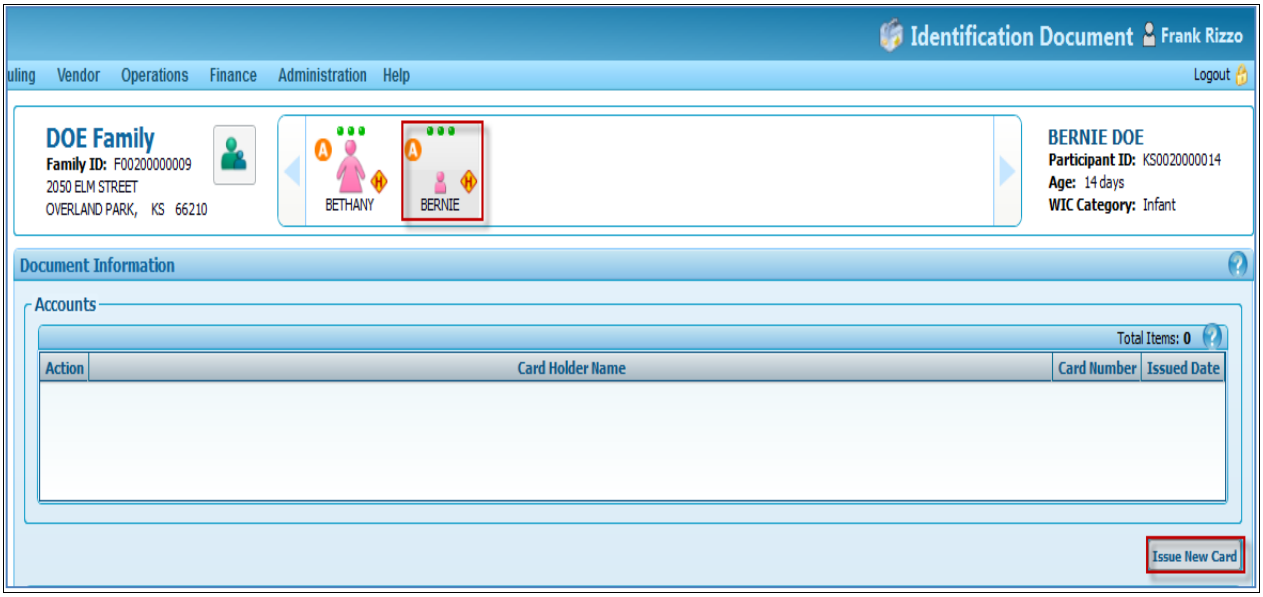
Task A. Issuing an Identification Document (for non-EBT States) 19-2

Task B. Replacing an Identification Document 19-4

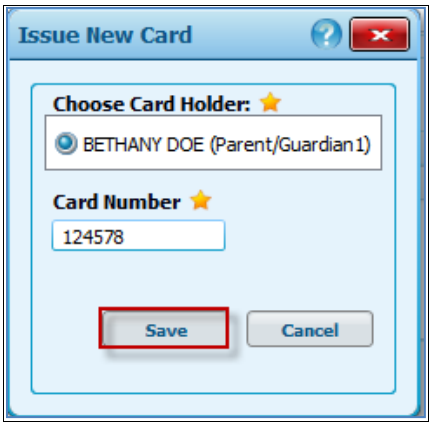
Task A. Issuing an Identification Document (for non-EBT States)

Complete the following steps to perform this task:

1. Search for and access a family record.
2. Go to **Family Services → Certification → Identification Document**. The **Identification Document** screen displays.

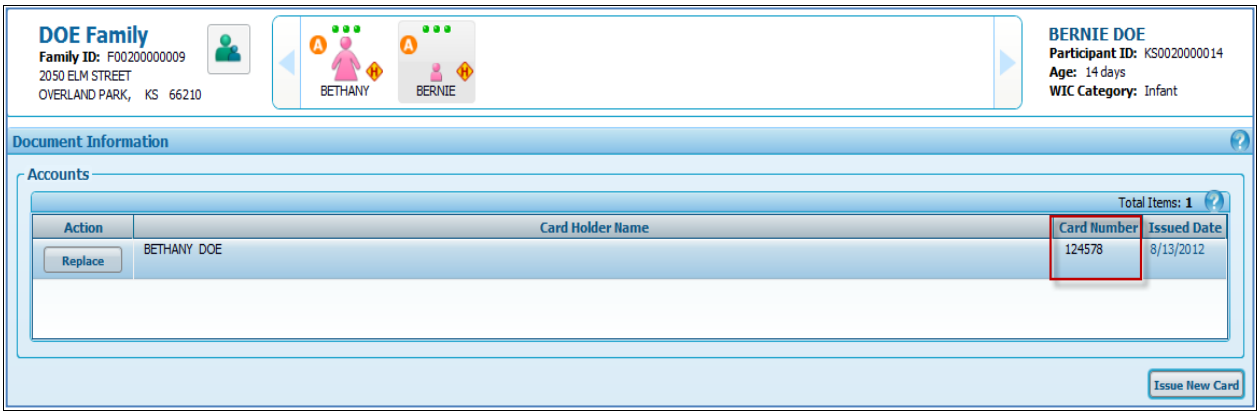


3. Click **Issue New Card**. The **Issue New Card** screen displays.
4. Under **Choose Card Holder**, select a card holder.
5. Enter the unique number or swipe the card.



This unique number can be assigned to the card by swiping it through a card reader or manually entering the number directly on the card as shown above.

6. Click **Save**. A status message displays indicating the new ID card was issued successfully and you are returned to the **Identification Document** screen with the newly added document displayed in the **Accounts** grid.



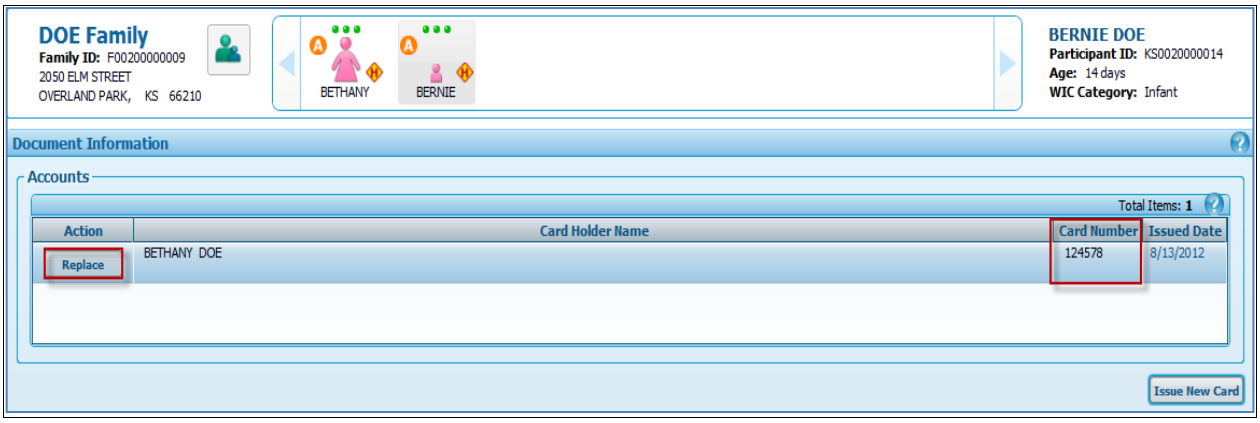
Only one WIC ID card/document can be active at a time per family.

Task B. Replacing an Identification Document

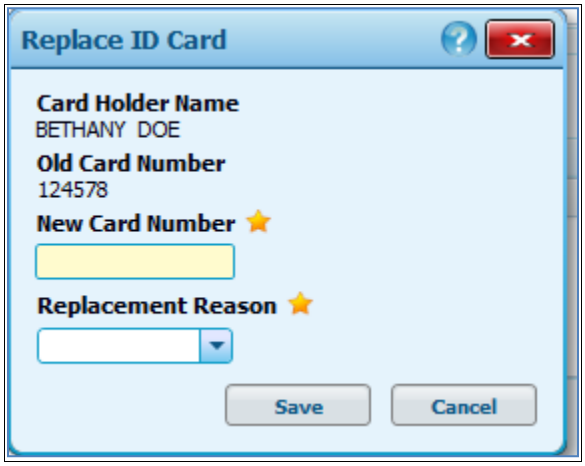
The ID card/document does not affect food items. It is strictly used to associate the participant to their family record.

Complete the following steps to perform this task:

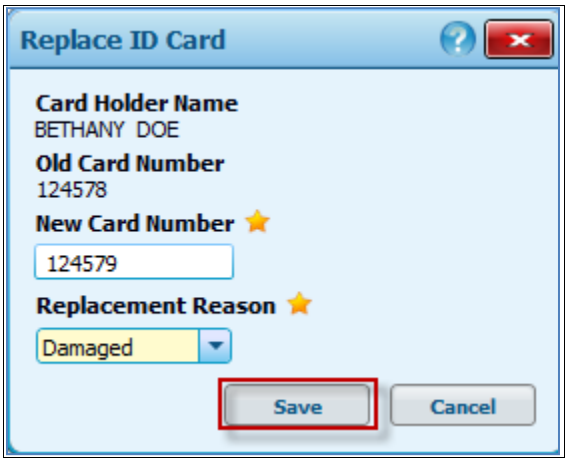
1. Search for and access a family record.
2. Go to **Family Services → Certification → Identification Document**. The **Identification Document** screen displays.



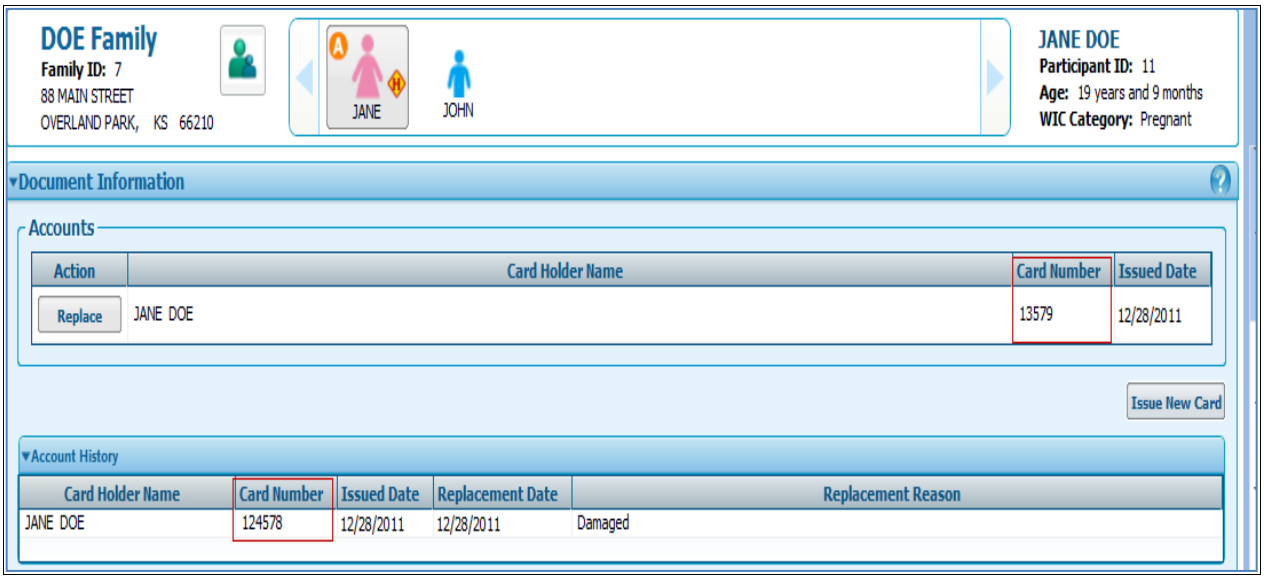
3. Within the **Accounts** grid, click **Replace**. The **Replace** screen displays.



4. Enter the **New Card Number**.
5. Select the **Replacement Reason**.



6. Click **Save**. A status message indicates the current ID card was deactivated. A new ID card was issued successfully and you are returned to the **Identification Document** screen and the replacement document is displayed within the **Accounts** grid.



Previously issued cards display in the Account History gird.

Congratulations!

You have successfully completed the **Issuing/Replacing an Identification Document** process.

Terminating and Reinstating Participants

A participant may be terminated from the WIC program for a variety of reasons before the end of the certification period. This scenario assumes you have searched for and accessed the desired family record.

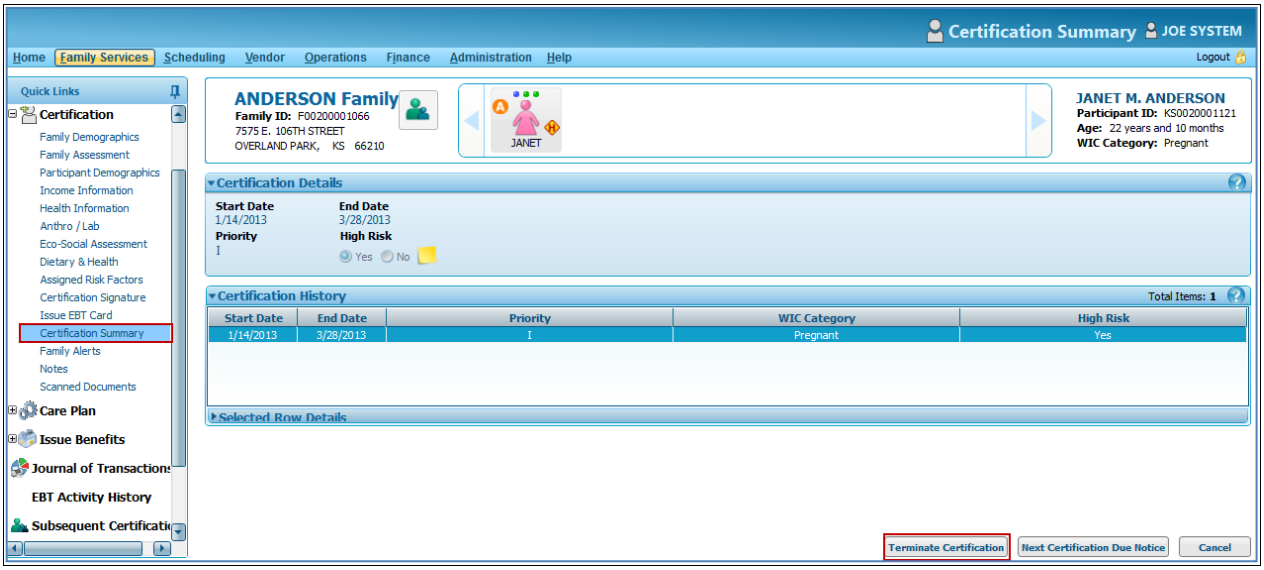
This process includes the following task(s):

Task A. Terminating a Participant 19-7
Task B. Reinstating a Participant 19-9

Task A. Terminating a Participant

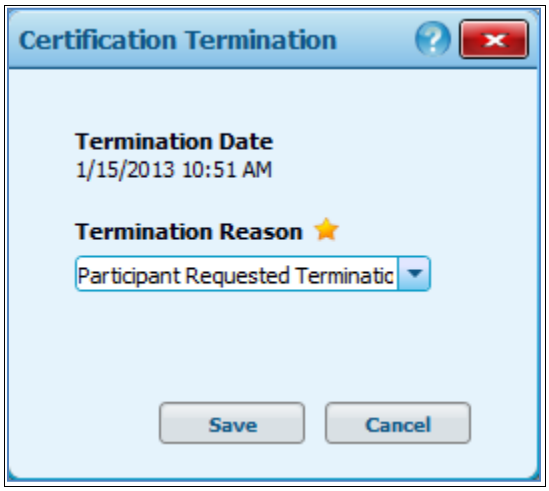
Complete the following steps to perform this task:

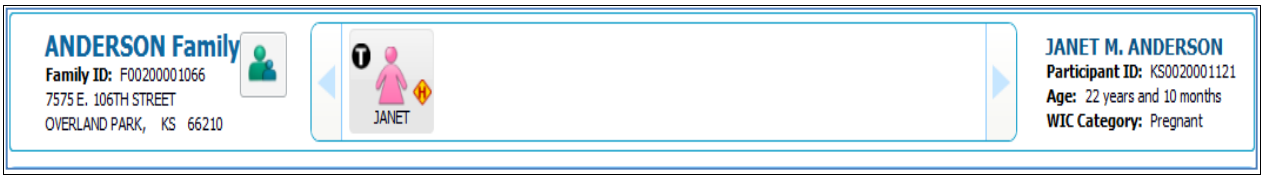
1. Go to **Quick Links → Certification → Certification Summary**. The **Certification Summary** screen displays.



2. Click **Terminate Certification**. The **Certification Termination** screen displays.
3. Select the **Termination Reason**.
4. Click **Save**. A status message displays indicating success and you are returned to the **Certification Summary** screen.

> The Termination Date automatically defaults to the current date. You cannot terminate a participant on a future date.



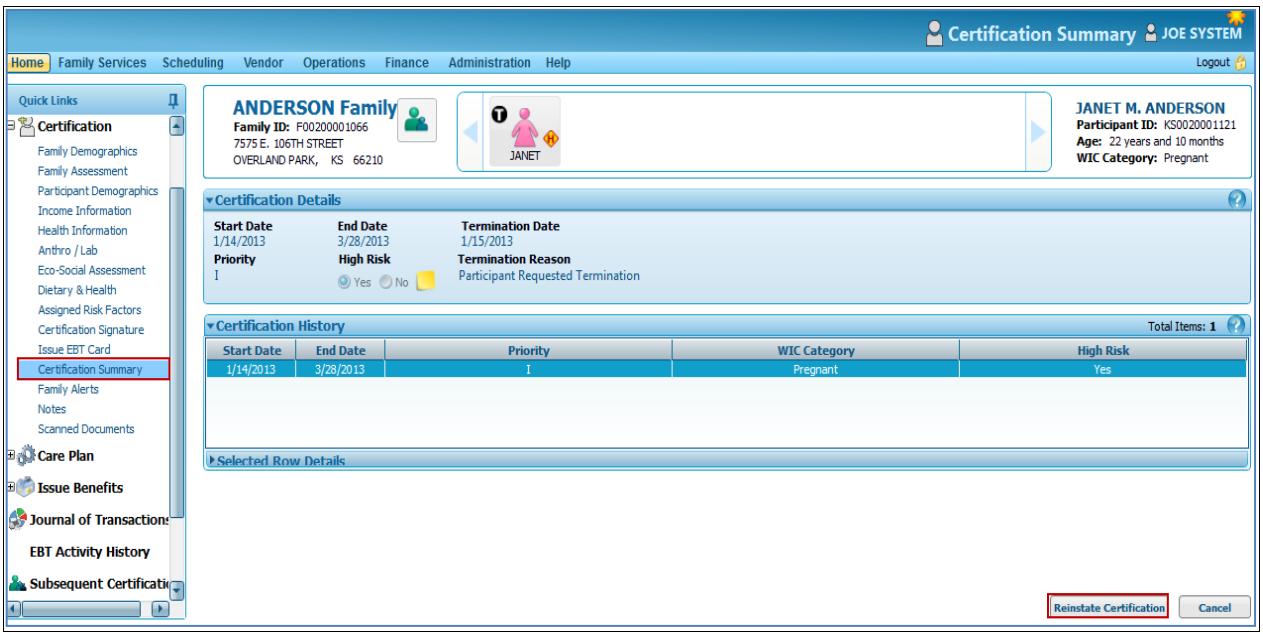


Ⓣ displays on the member's icon within the Family Header indicating the participant is now terminated and cannot receive future benefits.

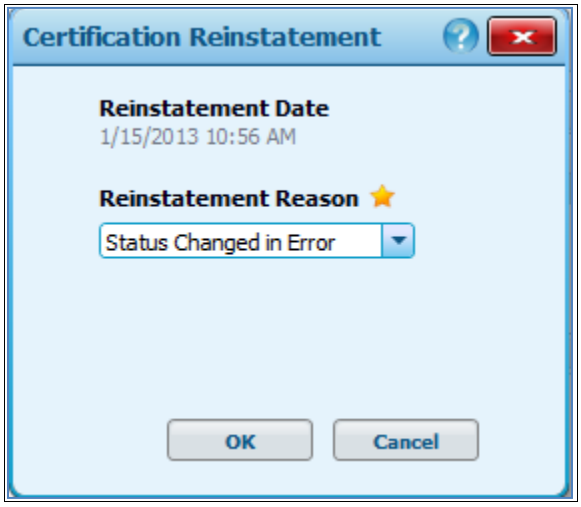
Task B. Reinstating a Participant

Complete the following steps to perform this task:

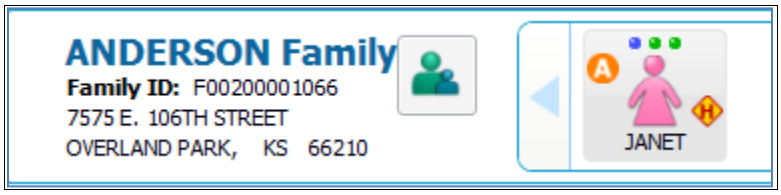
1. Go to **Quick Links → Certification → Certification Summary**. The **Certification Summary** screen displays.



2. Click **Reinstate Certification**. The **Certification Reinstatement** screen displays.
3. Select a **Reinstatement Reason**.
4. Click **OK**. A status message displays indicating success and you are returned to the **Certification Summary** screen.



The Active Certification Indicator (A) displays on the member's icon within the Family Header indicating the participant is now active. Benefit Issuance is permitted now, assuming a food prescription has been added to the member's record and it is on or after the family's issuance day.



Congratulations!

You have successfully completed the **Terminating and Reinstating Participants** process.

Using Peripheral Lab Equipment

Crossroads features the ability to interface with different equipment so that data entry is automatically passed from the equipment to the data fields in Crossroads. This scenario assumes that you have signed on, searched for and selected the family and participant. It is also assumed that the equipment has been installed and connected to a computer or the network that can access Crossroads. If any of the scales are being used by clinics within a state, the appropriate scale(s) need to be selected in Administration>Configuration>Manage System Settings. In addition, each scale must be assigned to a staff member with the appropriate user role.

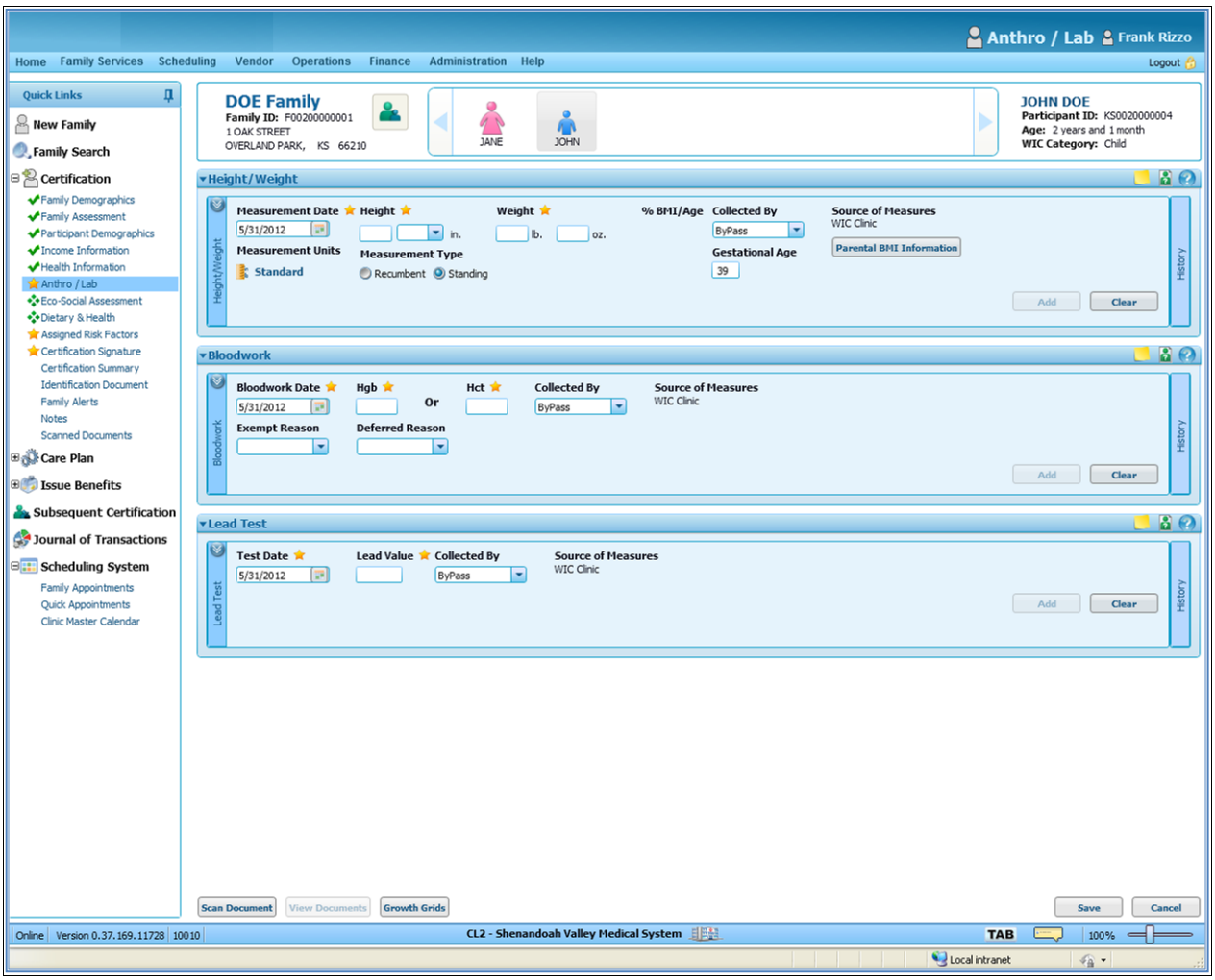
This process includes the following task(s):

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**

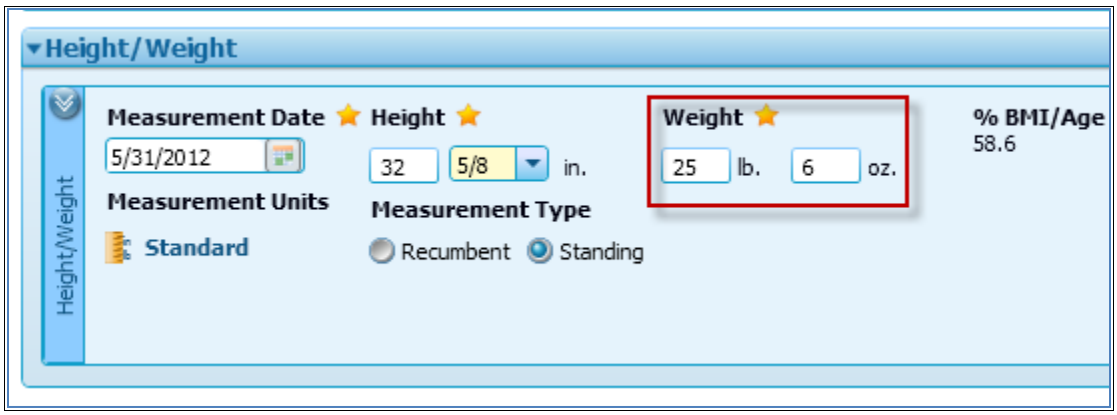
Task A. Using a Doran Scale for Weighing Equipment

Complete the following steps to perform this task:

1. Select a participant to record weight.
2. Go to **Quick Links → Certification → Anthro/Lab**. The **Anthro/Lab** screen displays.



3. Select the participant in the Family Header.
4. Weigh the participant with the Doran scale, using appropriate anthropometric measurement procedures. The weight values automatically populate the **Weight** fields after the scale has locked a weight value and beeps. This process may take a few seconds before the weight displays on the screen.



5. Use the Reweigh function on the Doran Scale to get a confirming weight. The confirming weight will show in the weight data field if it is different from the previous weight.

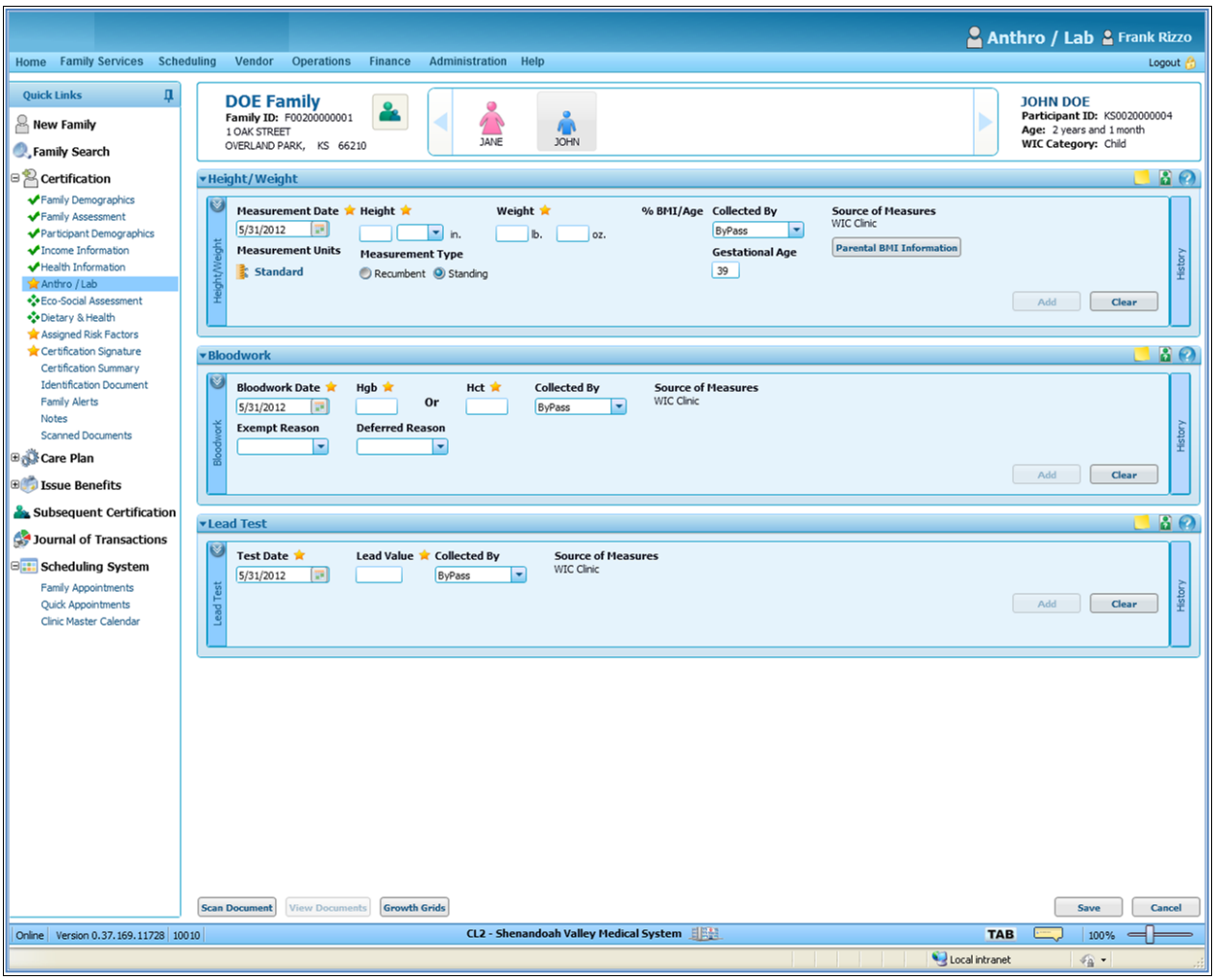
> Weight values are directly displayed in the weight field on the Anthro/Lab screen.
>
> The data will automatically be entered into the weight field as long as Crossroads is displaying the Anthro/Lab screen. The ounces value is converted from the decimal reading on the scale into ounces. For example, the reading on the scale was 25.4, which was converted to 25 lbs., 6 oz. It is assumed the Doran Weight equipment is directly connected through a port on a Crossroads Lab computer. It is assumed the necessary Windows driver for the Doran scale has been installed according to the manufacturer.
>
> The Doran scale must be selected under Clinic in Administration>Configuration>Manage System Settings.

6. Complete required fields on the **Anthro/Lab** screen.
7. Click **Save**. A confirmation message displays indicating the screen was saved.

Task B. Using a Seca Combination Height and Weight Scale

Complete the following steps to perform this task:

1. Select a participant to record height and weight.
2. Go to **Quick Links → Certification → Anthro/Lab**. The **Anthro/Lab** screen displays.



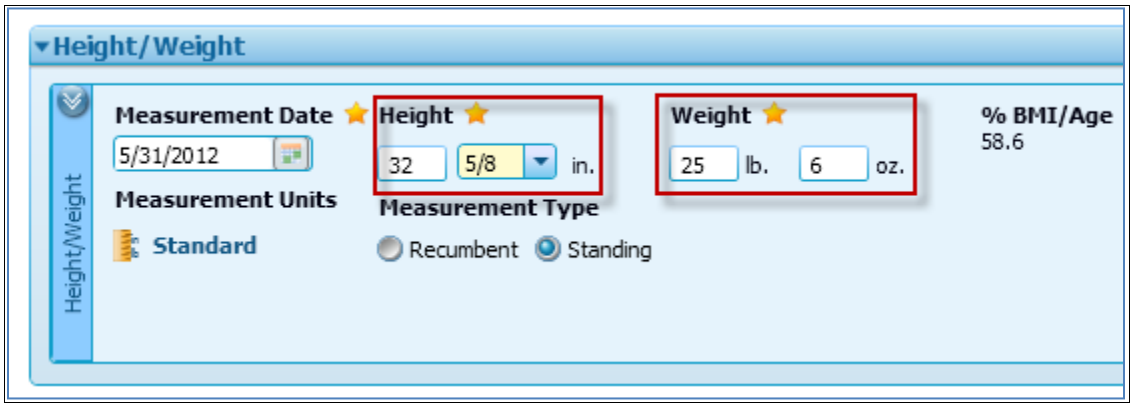
3. Select the participant in the Family Header.
4. The participant stands on the scale. Take the height and weight of the participant with the Seca Combination Height and Weight scale, using appropriate measurement procedures. This process may take a few seconds before the height and weight displays on the screen.

> It is assumed the Seca equipment is linked with Crossroads (USB wireless receiver is connected to the Lab computer) and the interface has been established with Crossroads according to the specification listed in ECD 04 – Lab Equipment Seca Measuring Station. It is assumed the required Seca software drivers are installed on the Lab computer.

The Seca scale must be selected under Clinic in Administration>Configuration>Manage System Settings.

The Seca software, Seca EMR Flash 101, must be running before starting Crossroads and the height measuring device must be calculated.

5. When the height and weight are obtained, press Send on the Seca display. Weight values will be directly displayed in the weight field, and the stature measurement will be shown in the **Height** field.



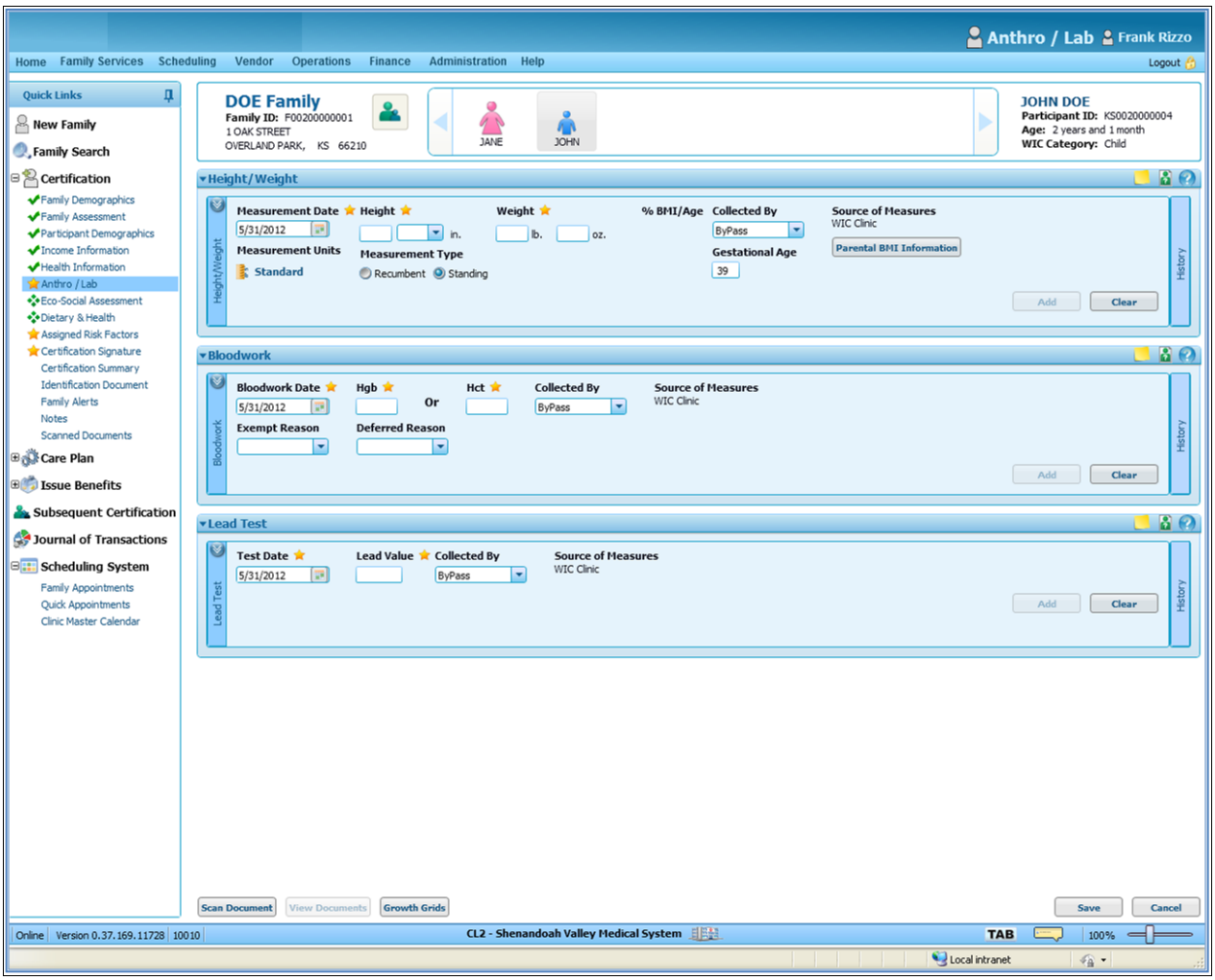
The data will automatically be entered into the height and weight fields as long as Crossroads is displaying the Anthro/Lab screen. The ounces value is converted from the decimal reading on the scale into ounces. The height value will be converted into inches and eights of an inch in Crossroads if standard measurement type is selected.

6. Complete required fields on the **Anthro/Lab** screen.
7. Click **Save**. A confirmation message displays indicating the screen was saved.

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

Complete the following steps to perform this task:

1. Select a participant to record height and weight.
2. Go to **Quick Links → Certification → Anthro/Lab**. The **Anthro/Lab** screen displays.



3. Select the participant in the Family Header.
4. The participant stands on the scale. Take the height and weight of the participant with the Health-O-Meter 600KL Physician Electronic Scale, using appropriate anthropometric measurement procedures.

> It is assumed the Health-O-Meter 600KL Physician Electronic Scale equipment is linked with Crossroads (direct USB cable is connected to the Lab computer) and the interface has been established with Crossroads according to the specification listed in ECD 05 – Lab Equipment Healthometer Scale. It is assumed the required Healthometer software drivers are installed on the Lab computer.

The Health-O-Meter 600KL Physician Electronic Scale must be selected under Clinic in Administration>Configuration>Manage System Settings and the height measuring device must be calculated.

5. When the height and weight are obtained, press Hold to retain the readings on the Health-o-meter display. Press Send as directed. Weight values will be directly displayed in the **Weight** fields, and the stature measurement will be shown in the **Height** field.

The data will automatically be entered into the weight and height fields as long as Crossroads is displaying the Anthro/Lab screen. The ounces value is converted from the decimal reading on the scale into ounces. The height value will be converted into inches and eights of an inch in Crossroads if standard measurement type is selected.

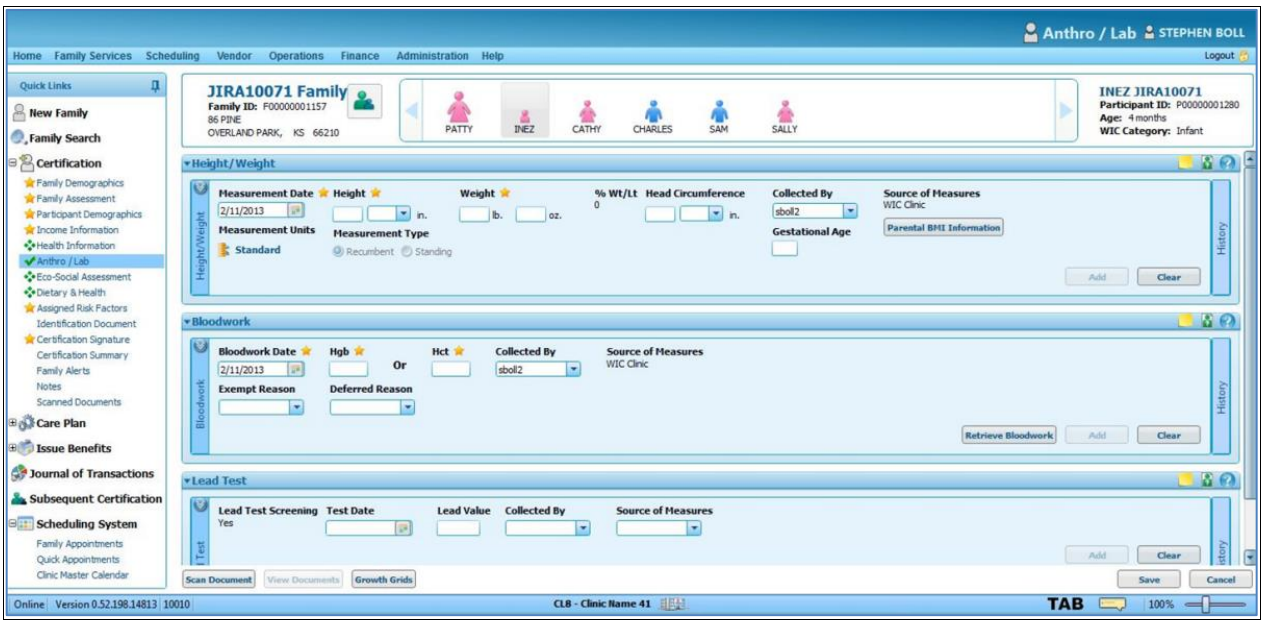
6. Complete required fields on the **Anthro/Lab** screen.

7. Click **Save**. A confirmation message displays indicating the screen was saved.

Task D. Using Hemoglobin Equipment

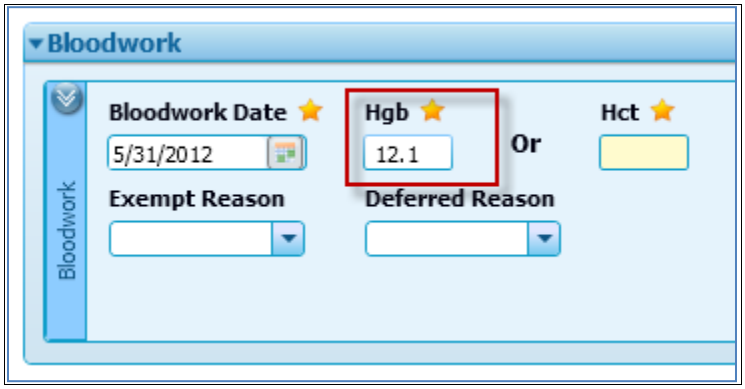
Complete the following steps to perform this task:

1. Select a participant to record a Hemoglobin value.
2. Go to **Quick Links → Certification → Anthro/Lab**. The **Anthro/Lab** screen displays.



3. Click **Retrieve Bloodwork** and follow the directions displayed. The **Retrieve Bloodwork** button displays only if a Hemocue device is connected properly to the computer.

4. Collect a blood sample according to agency policy and use Hemocue to analyze. Hemoglobin data displays automatically in the **Hgb** field.



It is assumed the Hemocue equipment is linked with Crossroads (USB cable is connected to the Lab computer) and the interface has been established with Crossroads according to the specification listed in ECD 06 – Lab Equipment Hemoglobin Meter. It is assumed the required Hemocue software drivers are installed on the Lab computer. No configuration settings are required for the Hemocue Meter.

5. At a minimum, complete all other required fields on the **Anthro/Lab** screen.
6. Click **Save**. A confirmation message displays indicating the screen was saved.

Congratulations!

You have successfully completed the **Using Peripheral Lab Equipment** process.

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20- PARTICIPANT PORTAL PROCESS

Verifying Potential Eligibility

Applications submitted on-line are viewed by WIC staff for eligibility and for potential duplicates. Using the Participant Portal, an applicant can submit an online application for WIC services in a language selected by the applicant, either English or Spanish. The selected language remains as the default for all screens unless the user changes it. Preliminary applicant information is collected to schedule an appointment for the applicant/family. Basic family information and self-declared income information is collected for eligibility with a disclaimer that any apparent results are informational only and eligibility remains subject to program review. Identification numbers are assigned for applicants without an existing number. The applicant/family chooses a user ID and password to access their information for updating and scheduling appointments.

When a family is created through the Participant Portal application, the **New Family** screen displays in read-only mode the first time the applicant record is opened from the Search screen. This screen is used to accept or reject the online record. The user actions available on this screen are **Accept**, **Invalid**, and **Cancel**.

Within the footer section at the bottom of the screen, the Privacy Policy, Terms of Use, Non-Discrimination Statement, and EEO links are displayed.

The Privacy Policy statement declares what specific information is collected by the website and whether it is kept confidential or shared with or sold to other firms, researchers or sellers.

The Non-Discrimination Statement states that it is illegal to discriminate based on race, religion gender or national origin when hiring. The department of Health and Human services does not tolerate discrimination by its employees when they are serving individuals who are eligible for its program.

EEO foot link displays the equal employment opportunity page.

This process includes the following tasks:

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

Task A. Verify Potential Eligibility

Online Application Process

Help

Prescreening | Registration | Family Information | Clinic Selection | Health Information (Optional) | Appointments

Prescreening

Please enter information below to verify your eligibility for WIC Services

Do you currently live in Kansas?

Yes No

Please check all that applies to your family:

- I have children under 5
- I had a baby in the last six months
- I am nursing my baby
- I am pregnant

How many people live in your household?

Your **household** is everyone who lives in your home (including children) and shares income and household expenses (bills, food, etc.). Your household may include people who are related to you and people who are not.

Note: If a woman in your household is pregnant, you may increase your household size by the number of expected births.

Are you or anyone in your household currently enrolled in any of the following programs? (Check all that apply):

- Supplemental Nutrition Assistance Program (SNAP)
- Medicaid
- Temporary Assistance to Needy Families (TANF)
- None of the above

Next Cancel

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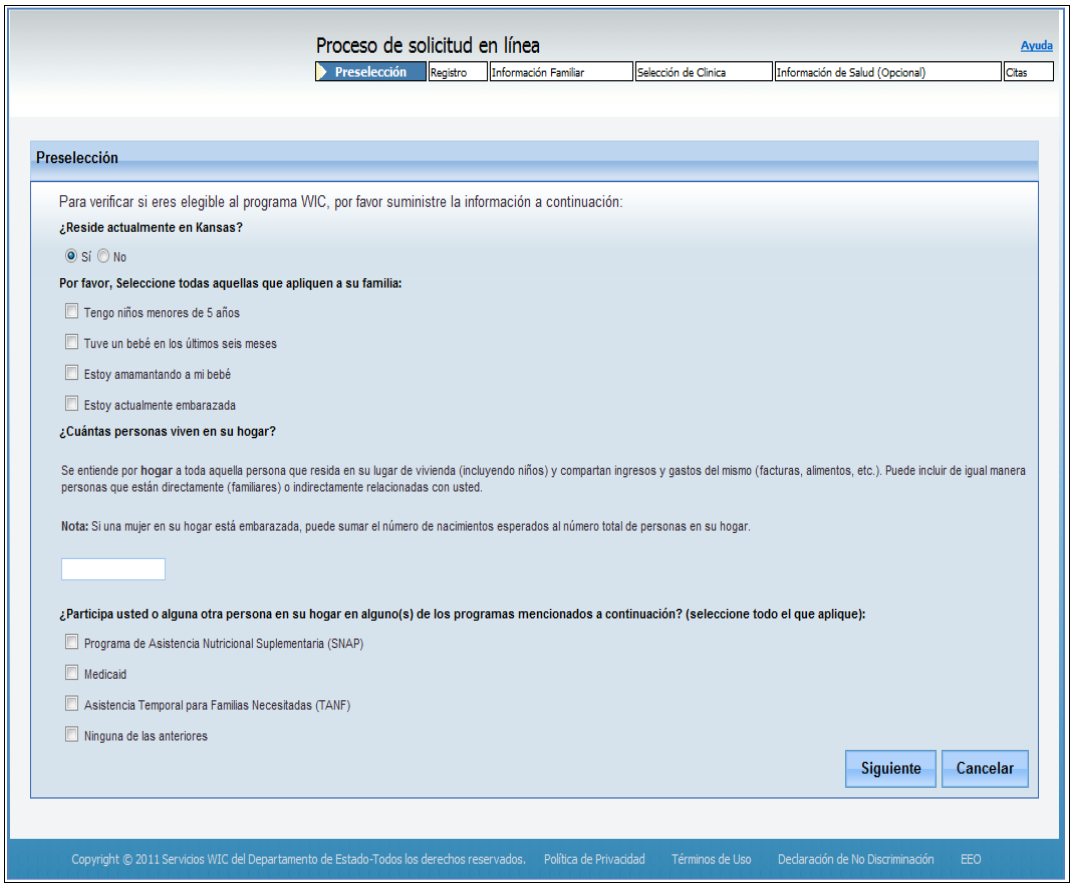
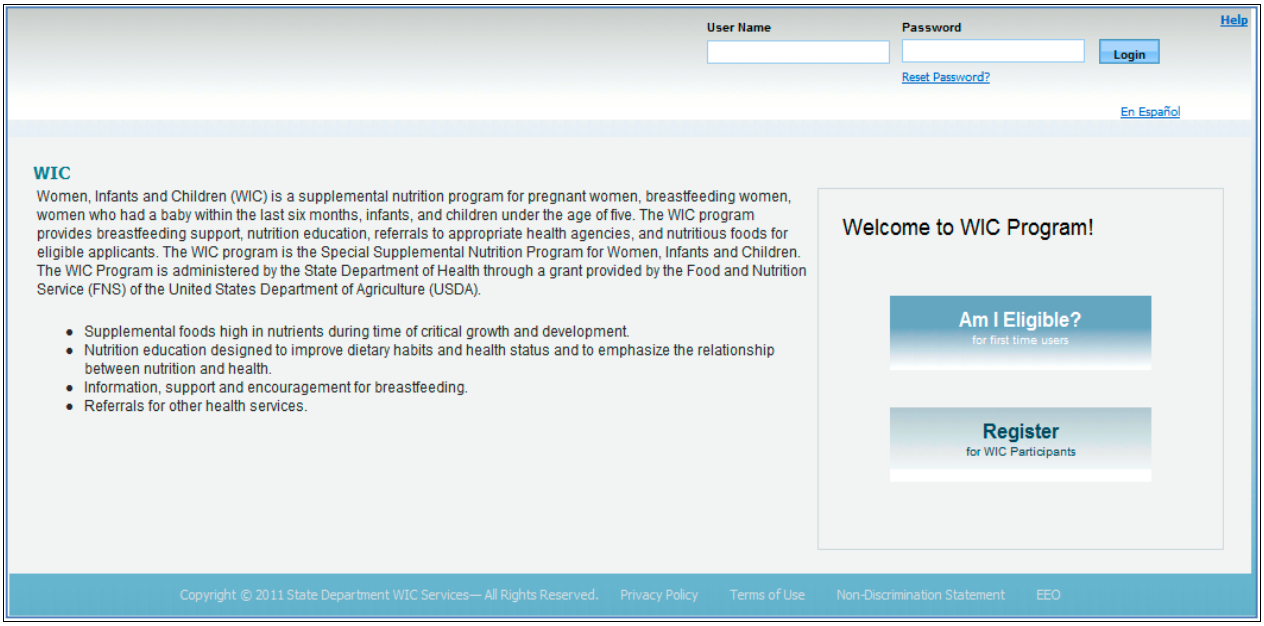
Throughout the Participant User Manual only the English and Spanish versions of the main screens in each task will display. The other screens will display in English.

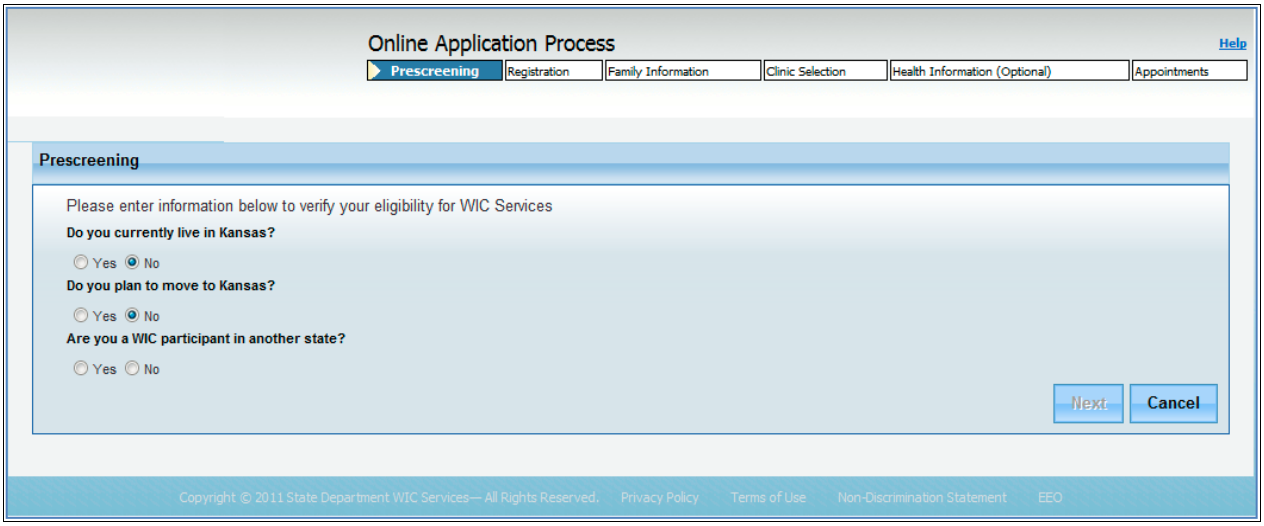


Complete the following steps to perform this task:

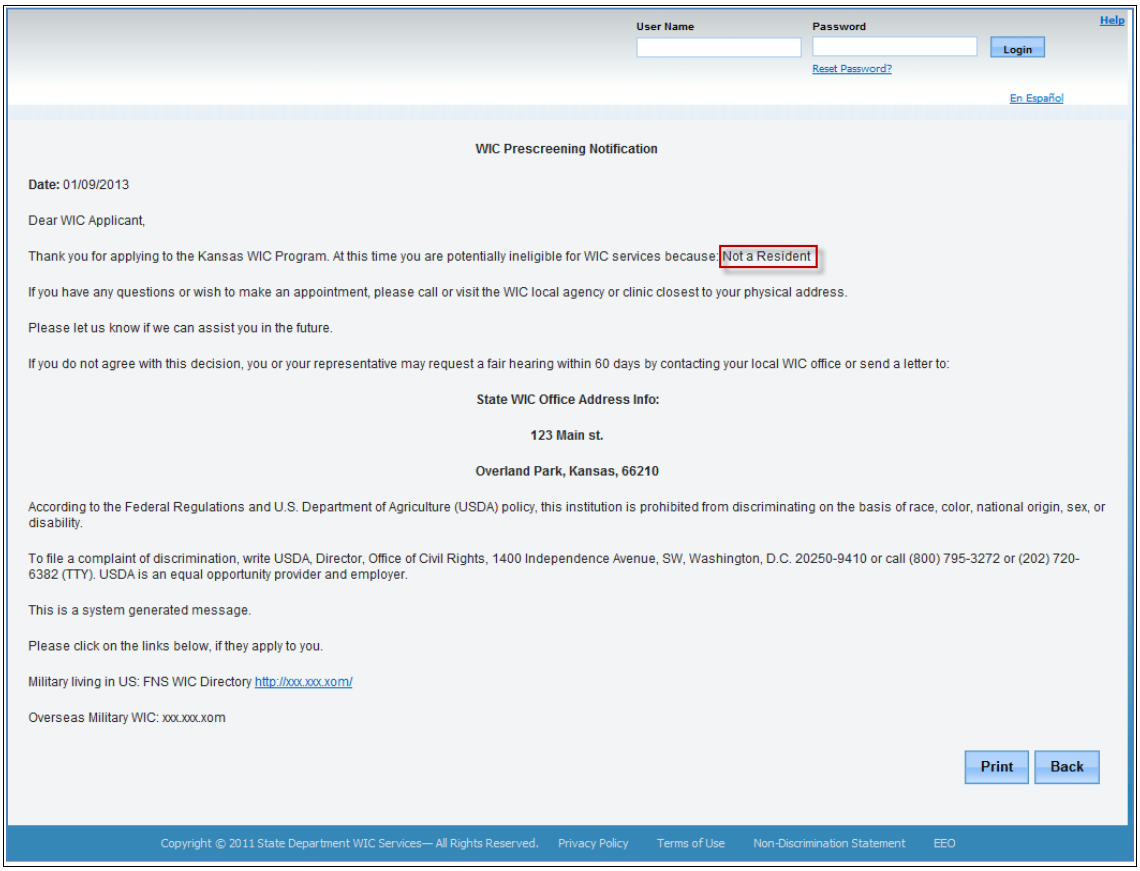
1. From the state WIC website, go to the **Participant Portal** link. The **Participant Portal** main screen displays.



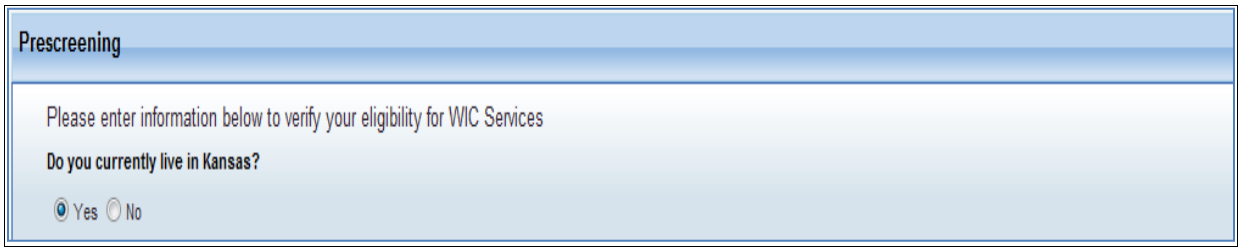
- Select the **Am I Eligible?** (for first time users) button. The **Prescreening** screen displays. For this task, please respond to the next three questions with **No**.
- Click the **Yes or No** radio button in response to **Do you currently live in** <state>. If you answered **No**, another question will display.
- Click the **Yes** or **No** radio button in response to **Do you plan to move to** <state>. If you answered **No**, another question will display.
- Click the **Yes** or **No** radio button in response to **Are you a WIC participant in another state**. The system generates an ineligibility notice, which can be viewed on the screen.



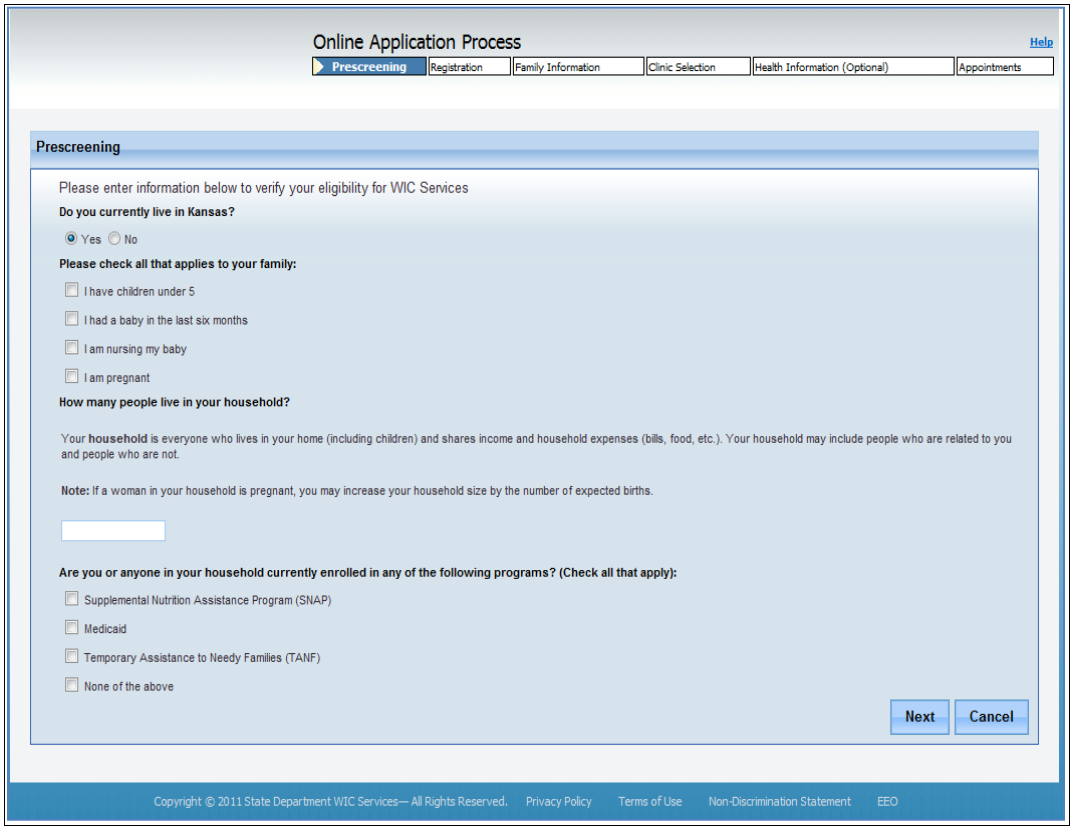
If, during the prescreening eligibility process, the individual's response is No to the residence questions, the individual is potentially NOT residentially eligible. The system automatically generates a WIC Ineligibility Notification based on residence.



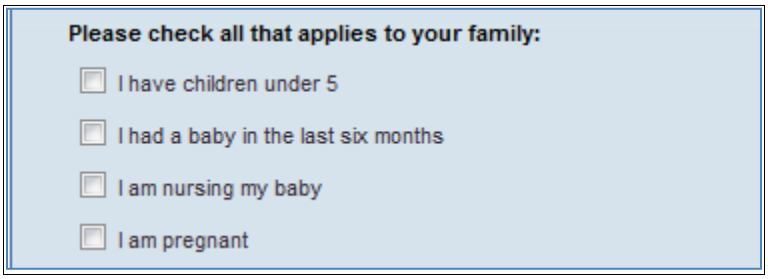
- Click **Print** to print a copy of the ineligibility notification.
- Click **Back** to be redirected to the **Prescreening** screen.



- Select **Yes** to **Do you currently live in** <state>. The **Prescreening** screen expands.



Potential Category eligibility is determined by the response to the section of the Prescreening screen titled 'Please check all that applies to your family' (screen below). If none of the check boxes are selected, a Notice of Ineligibility for category will be generated.



Help

User Name | Password | Login

Reset Password?

En Español

WIC Prescreening Notification

Date: 01/09/2013

Dear WIC Applicant,

Thank you for applying to the Kansas WIC Program. At this time you are potentially ineligible for WIC services because: Categorically Ineligible

If you have any questions or wish to make an appointment, please call or visit the WIC local agency or clinic closest to your physical address.

Please let us know if we can assist you in the future.

If you do not agree with this decision, you or your representative may request a fair hearing within 60 days by contacting your local WIC office or send a letter to:

State WIC Office Address Info:

123 Main st.

Overland Park, Kansas, 66210

According to the Federal Regulations and U.S. Department of Agriculture (USDA) policy, this institution is prohibited from discriminating on the basis of race, color, national origin, sex, or disability.

To file a complaint of discrimination, write USDA, Director, Office of Civil Rights, 1400 Independence Avenue, SW, Washington, D.C. 20250-9410 or call (800) 795-3272 or (202) 720-6382 (TTY). USDA is an equal opportunity provider and employer.

This is a system generated message.

Please click on the links below, if they apply to you.

Military living in US: FNS WIC Directory http://xxx.xxx.xom/

Overseas Military WIC: xxx.xxx.xom

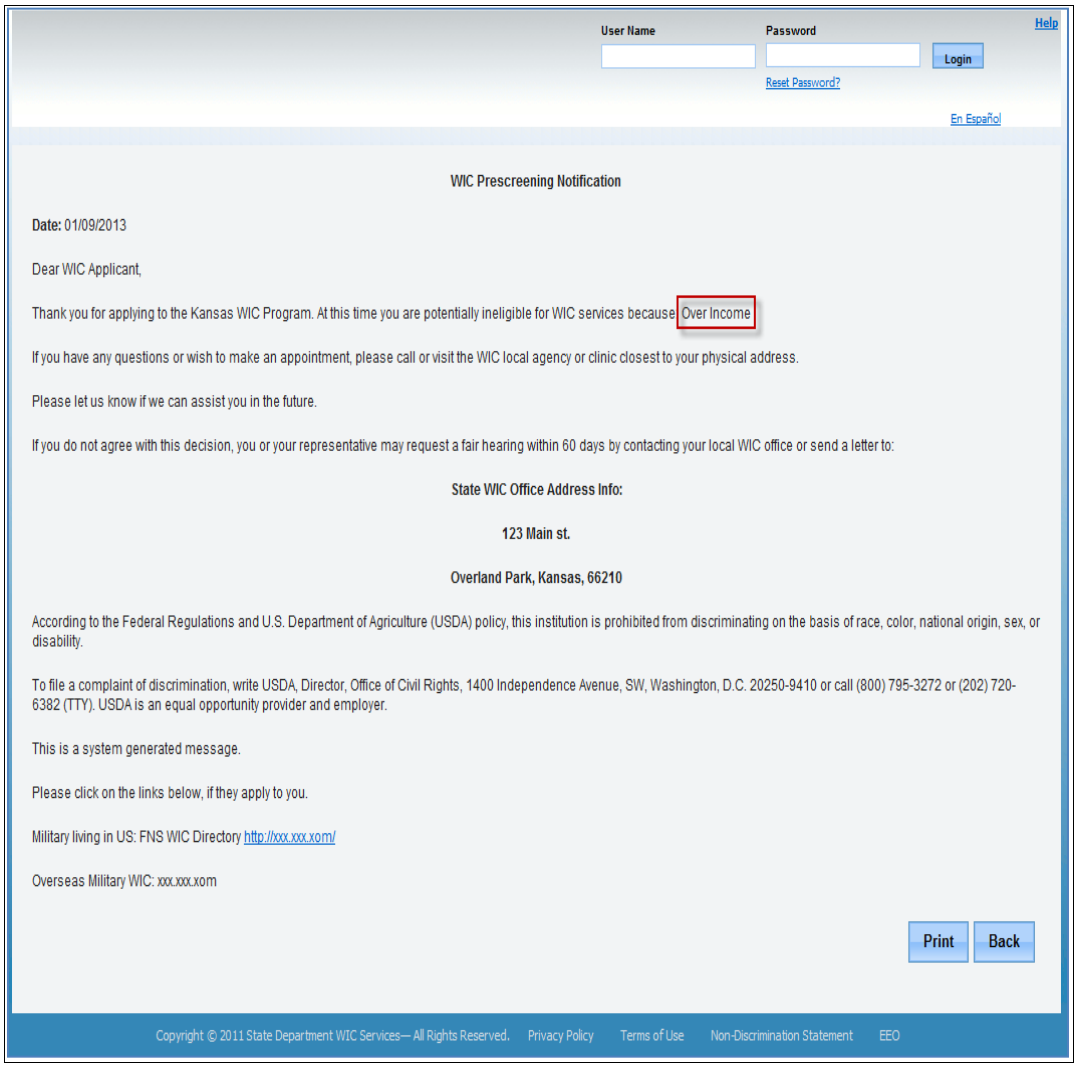
Income eligibility is determined by the response to the section of the Prescreening screen titled Are you or anyone in your household currently enrolled in any of the following programs? (Check all that apply) and is based on a comparison of the household size to the annual income. If any of the adjunctive boxes are selected, an individual is potentially income eligible. If None of the above is selected, the screen expands. Income eligibility is based on the individual's annual income entered in the Annual Income before taxes text box. If the annual income is over the maximum limit, a Notice of Ineligibility for income will be generated.

Are you or anyone in your household currently enrolled in any of the following programs? (Check all that apply):

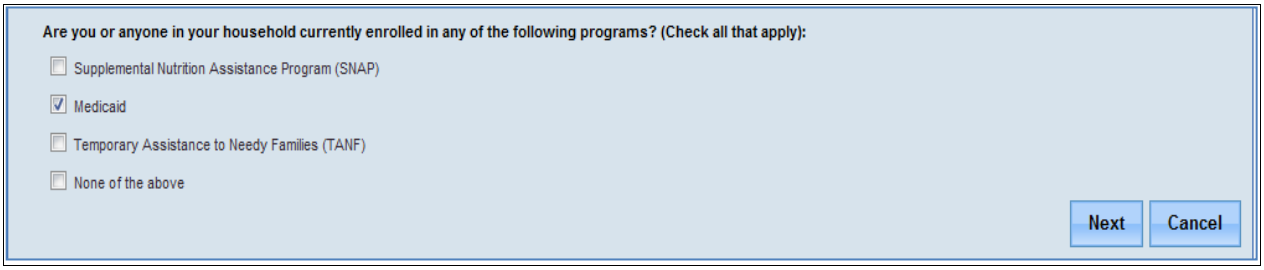
- [ ] Supplemental Nutrition Assistance Program (SNAP)
- [ ] Medicaid
- [ ] Temporary Assistance to Needy Families (TANF)
- [x] None of the above

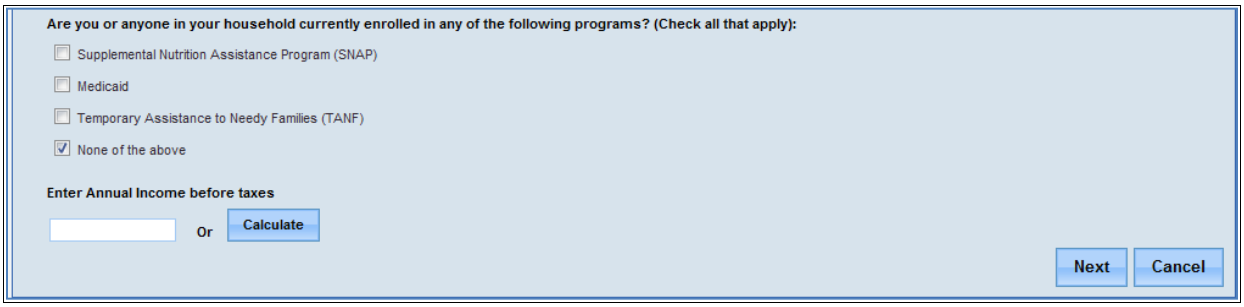
Enter Annual Income before taxes

$50,000.00 Or Calculate



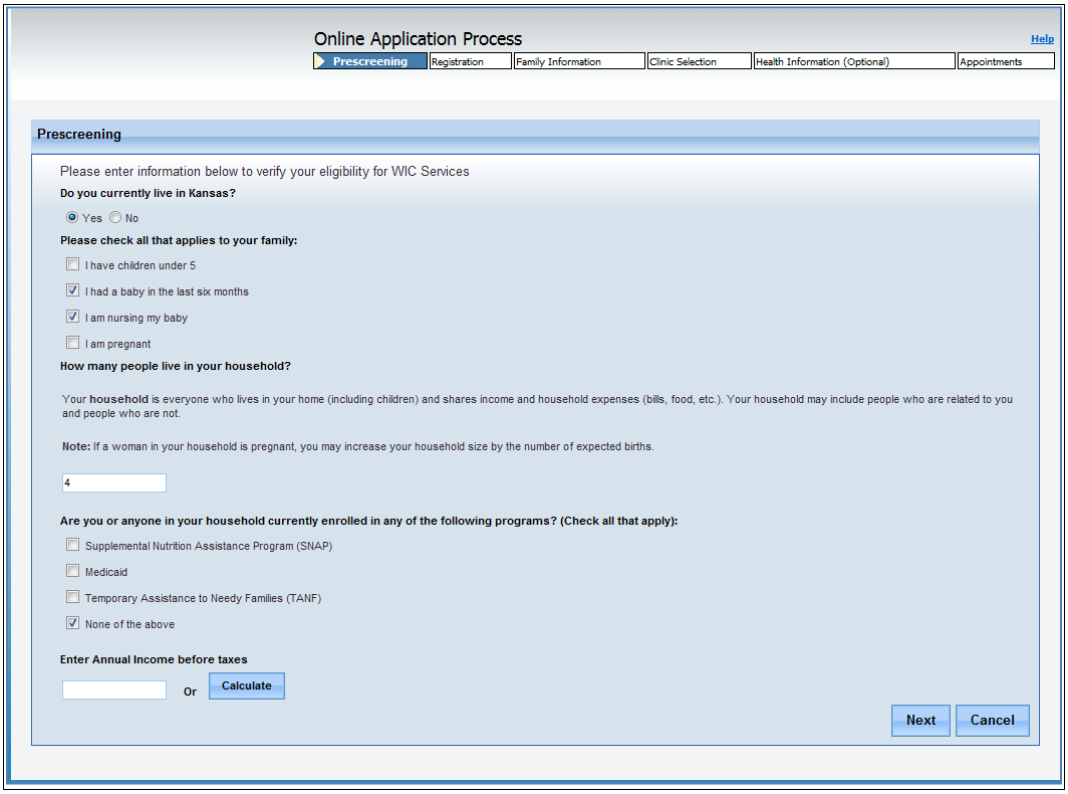
If the response to the Adjunctive options indicates the individual is potentially WIC eligible, the Prescreening screen will expand.



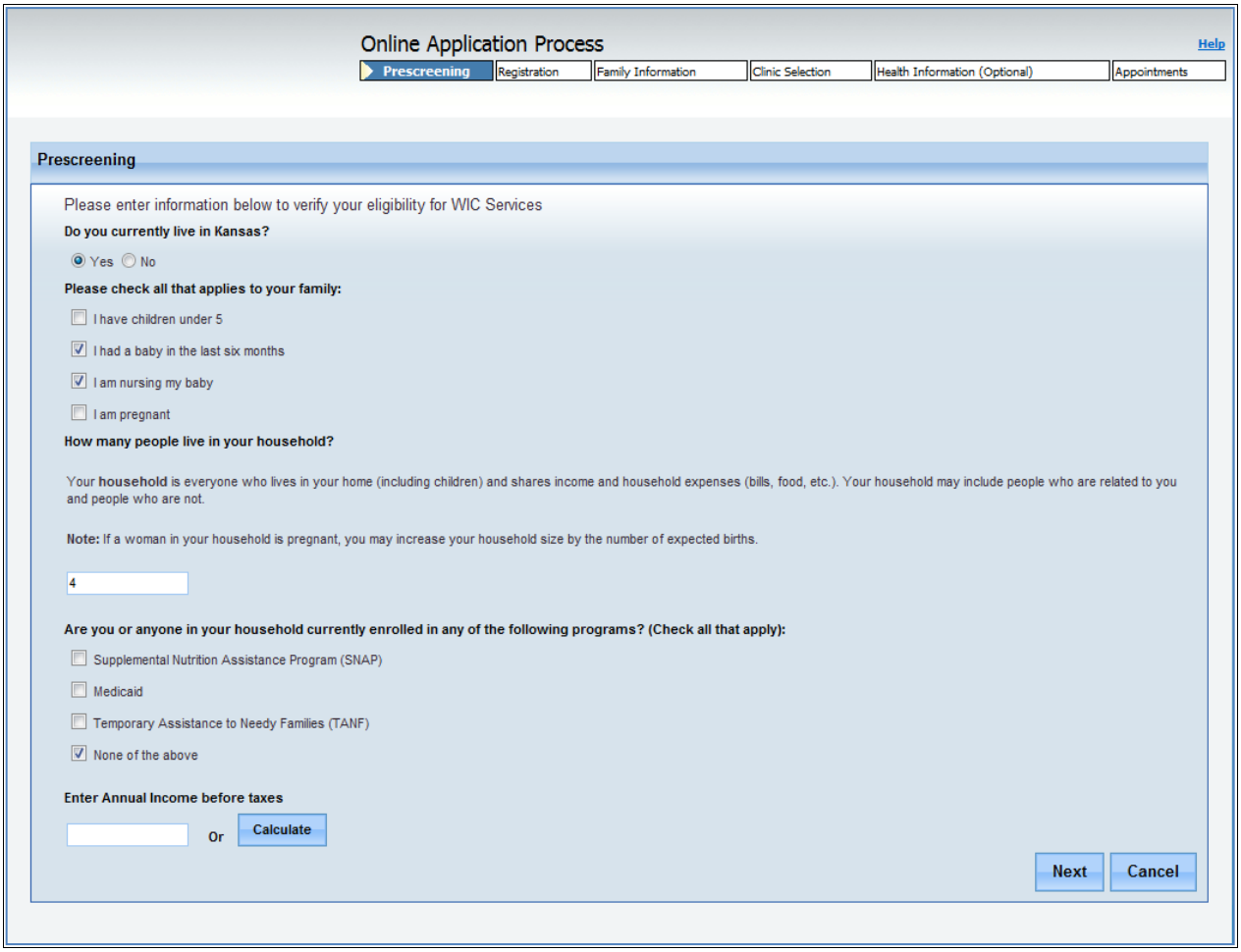


2. From the **State WIC Website**, go to the **Participant Portal** link. The **Participant Portal** main screen displays.

- Select **Am I Eligible** (for first time users). The **Prescreening** screen displays.
- Click **Yes** in response to **Do you currently live in Kansas**. The **Prescreening** screen expands allowing the user to continue the online application process.

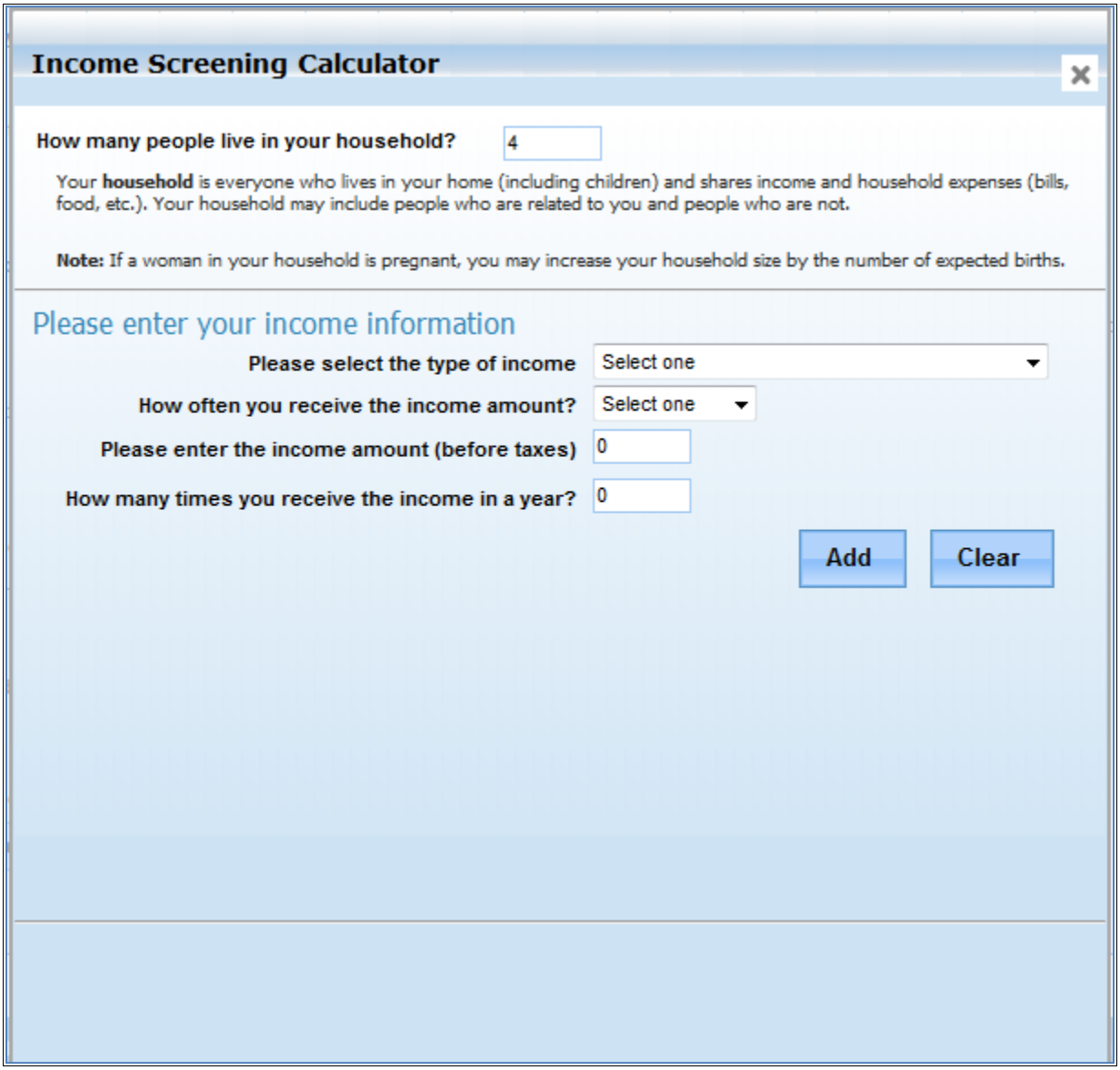


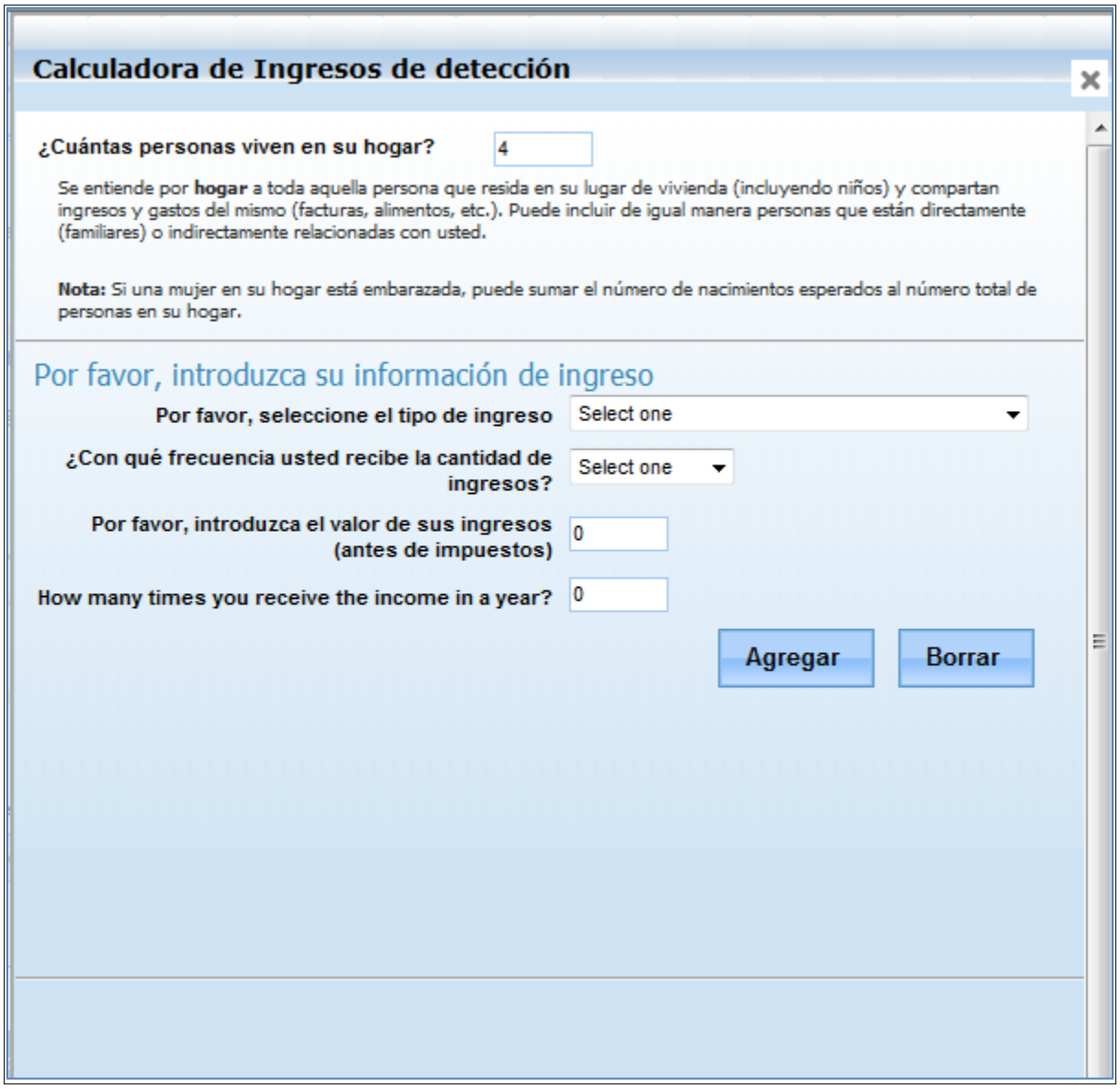
- Click the check box(s) in response to **Please check all that applies to your family**.
- Enter **How many people live in your household**.
- Click one or more check boxes in response to **Are you or anyone in your household currently enrolled in any of the following programs**.



If None of the Above box is selected, the Annual Income before taxes field displays. Income eligibility is based on the individuals' annual income. The annual income can be entered in the text box or the Income Screening Calculator can be used. You will use the Income Calculator for the next steps.

3. Click **Calculate**. The **Income Screening Calculator** displays with the number of people in the family.

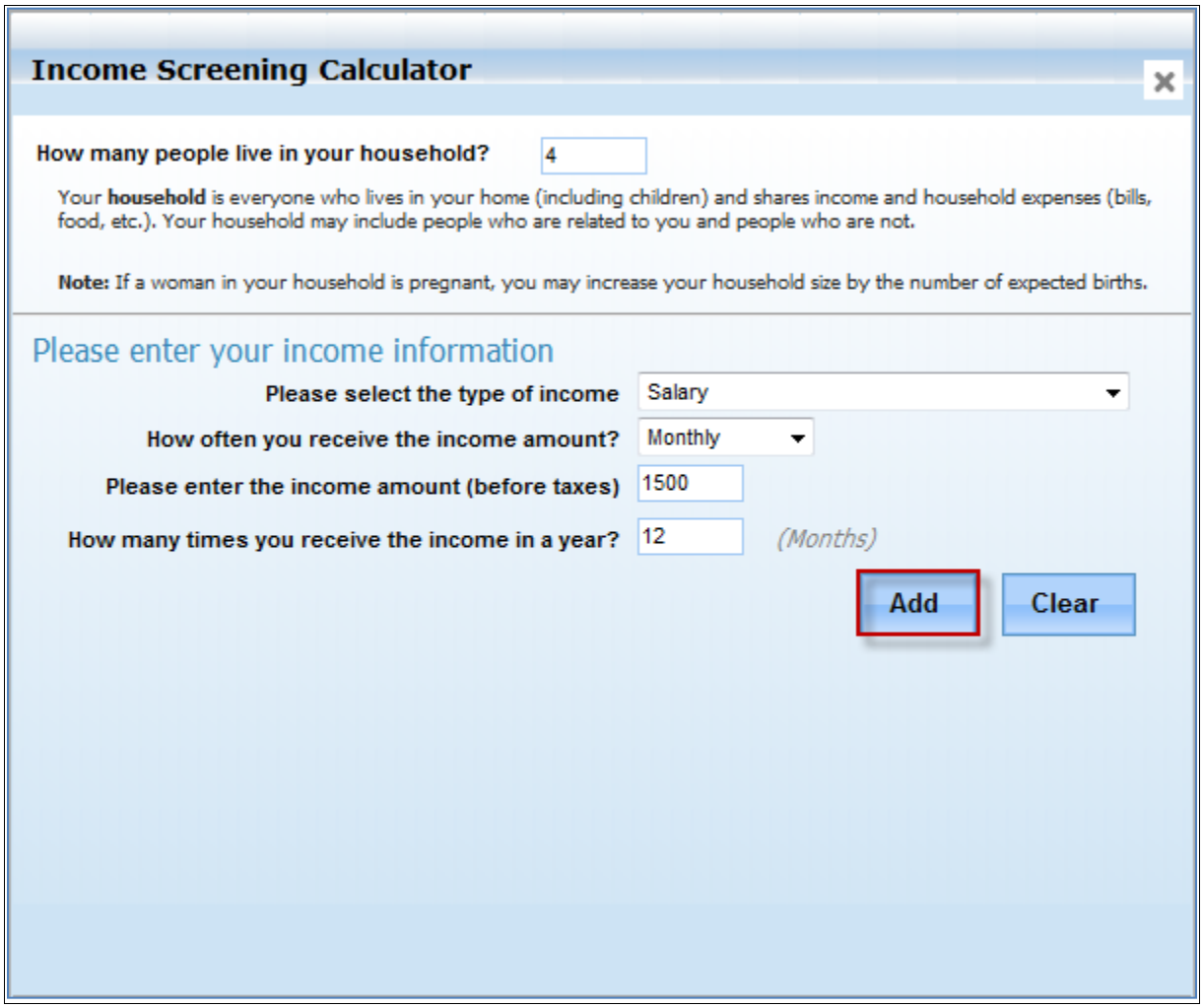




4. Complete the information from the following statements or questions:

- **Please select the type of income**.
- **How often you receive the income amount**.
- **Please enter the income amount (before taxes)**.
- **How many times you receive the income in a year**.

The user can add additional income to the calculator screen as needed. The user's response to How often you receive the income amount is directly related to the How many times you receive the income in a year text box. All the text boxes can be modified.



5. Click **Add**. The screen refreshes and displays the **Income Screening Calculator** with the income information displaying on the **Income Source** grid.

May be eligible will display if the total family income is below the maximum monthly income for the allotted number of family members. Potentially eligible – income total appears to meet guidelines is displayed with a disclaimer that the results are informational only and eligibility remains subject to program review.

Income Screening Calculator

How many people live in your household? 4

Your **household** is everyone who lives in your home (including children) and shares income and household expenses (bills, food, etc.). Your household may include people who are related to you and people who are not.

Note: If a woman in your household is pregnant, you may increase your household size by the number of expected births.

Please enter your income information

Please select the type of income Select one

How often you receive the income amount? Select one

Please enter the income amount (before taxes)

How many times you receive the income in a year?

Add Clear

	Income Source	Pay Period	Dollar Amoun	Hours per week	Duration
×	Salary	Monthly	1500	N/A	12

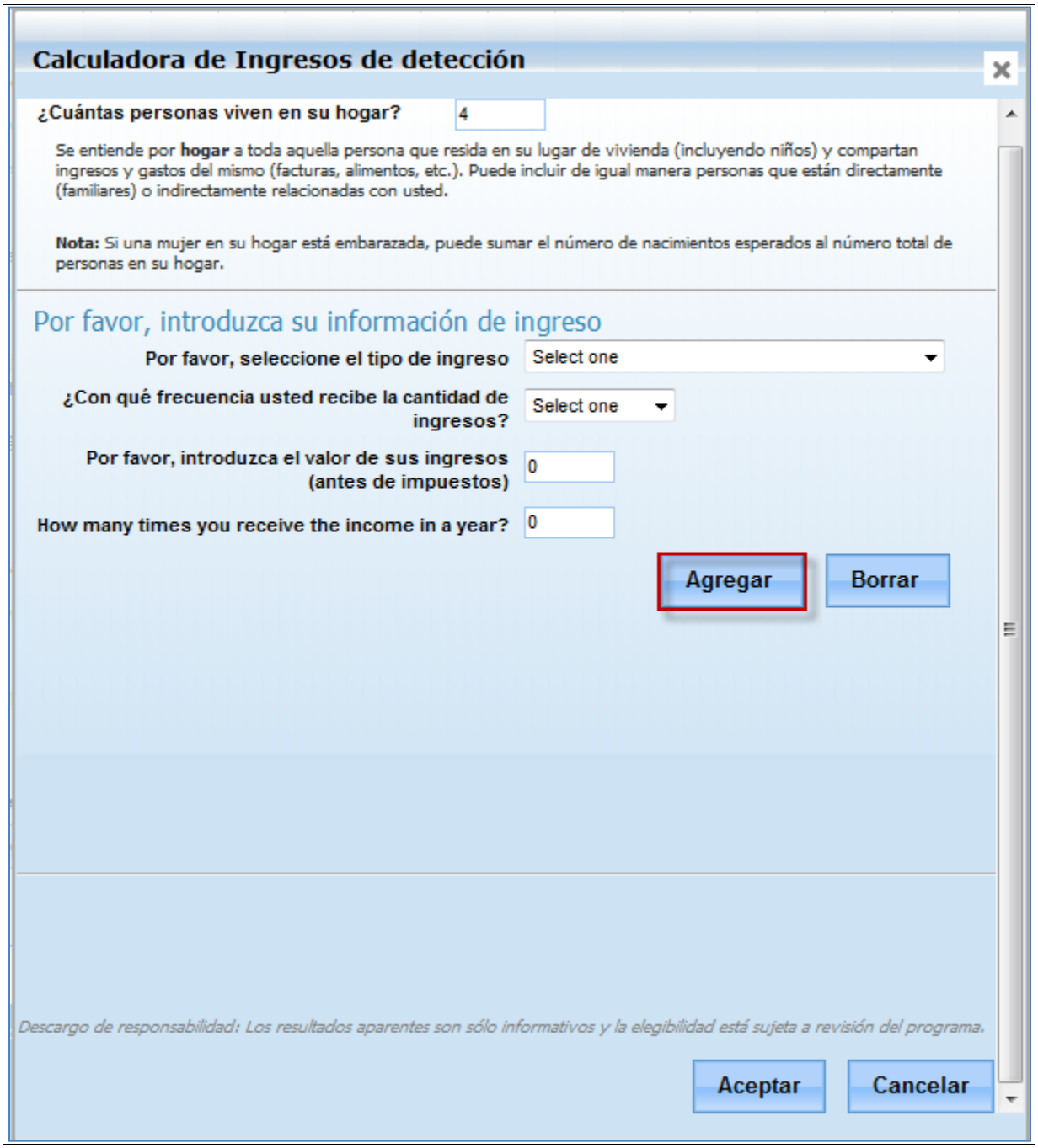
Total Family MonthlyIncome (before taxes) : **$1,500.00**

Maximum MonthlyIncome for household of size **4: $3,446.00**

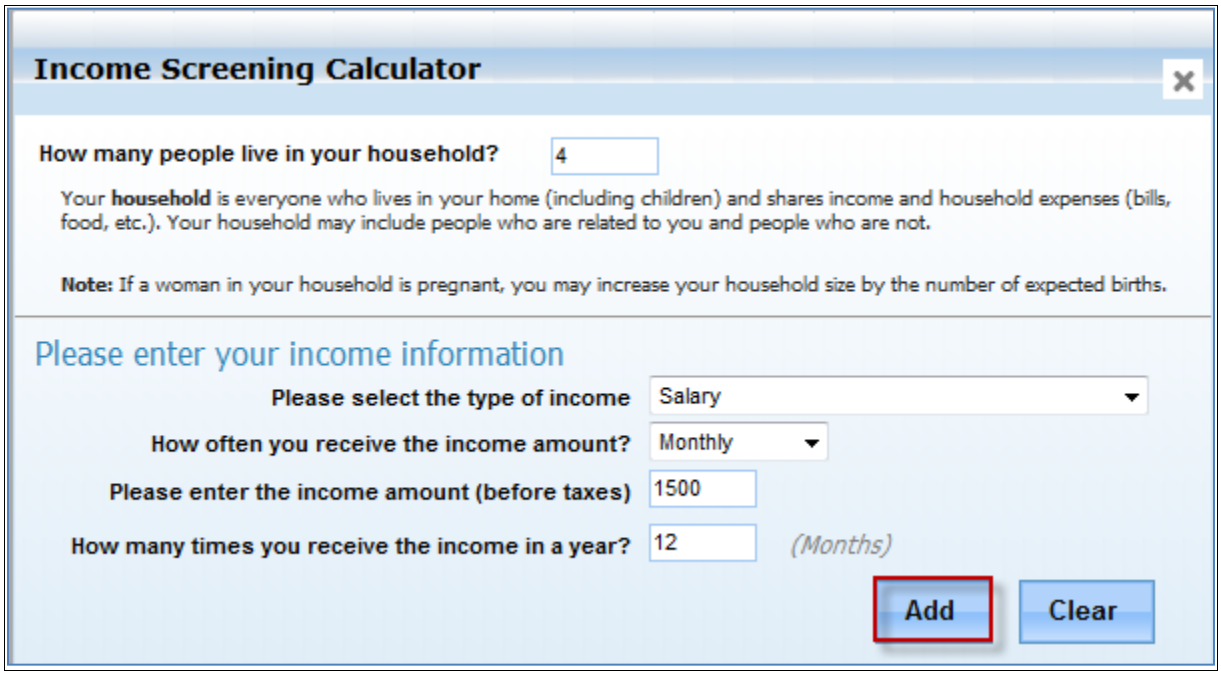
Potentially eligible—income total appears to meet guidelines

Disclaimer: Any apparent results are informational only and eligibility remains subject to program review.

OK Cancel



The user can add additional income to the calculator screen as needed. The user's response to How often you receive the income amount is directly related to the How many times you receive the income in a year field. All the fields can be modified.



6. Click **Add**. The screen refreshes and displays the **Income Screening Calculator** with the income information displays on the **Income Source** grid.

> "May Be Eligible" will display if the total family income is below the maximum monthly income for the allotted number of family members. May be eligible is displayed with a disclaimer that the results are informational only and eligibility remains subject to program review.

Income Screening Calculator

How many people live in your household? 4

Your **household** is everyone who lives in your home (including children) and shares income and household expenses (bills, food, etc.). Your household may include people who are related to you and people who are not.

Note: If a woman in your household is pregnant, you may increase your household size by the number of expected births.

Please enter your income information

Please select the type of income Select one

How often you receive the income amount? Select one

Please enter the income amount (before taxes)

How many times you receive the income in a year?

Add Clear

	Income Source	Pay Period	Dollar Amoun	Hours per week	Duration
×	Salary	Monthly	1500	N/A	12
×	Alimony or Child Support Received	Weekly	100	N/A	52

Total Family AnnualIncome (before taxes) : **$23,200.00**

Maximum AnnualIncome for household of size **4**: **$41,348.00**

Potentially eligible—income total appears to meet guidelines

Disclaimer: Any apparent results are informational only and eligibility remains subject to program review.

OK Cancel

Income Screening Calculator

How many people live in your household? 4

Your **household** is everyone who lives in your home (including children) and shares income and household expenses (bills, food, etc.). Your household may include people who are related to you and people who are not.

Note: If a woman in your household is pregnant, you may increase your household size by the number of expected births.

Please enter your income information

Please select the type of income Select one

How often you receive the income amount? Select one

Please enter the income amount (before taxes)

How many times you receive the income in a year?

Add Clear

	Income Source	Pay Period	Dollar Amoun	Hours per week	Duration
×	Gross Earnings	Annual	50000	N/A	1

Total Family AnnualIncome (before taxes) : **$50,000.00**

Maximum AnnualIncome for household of size **4**: **$41,348.00**

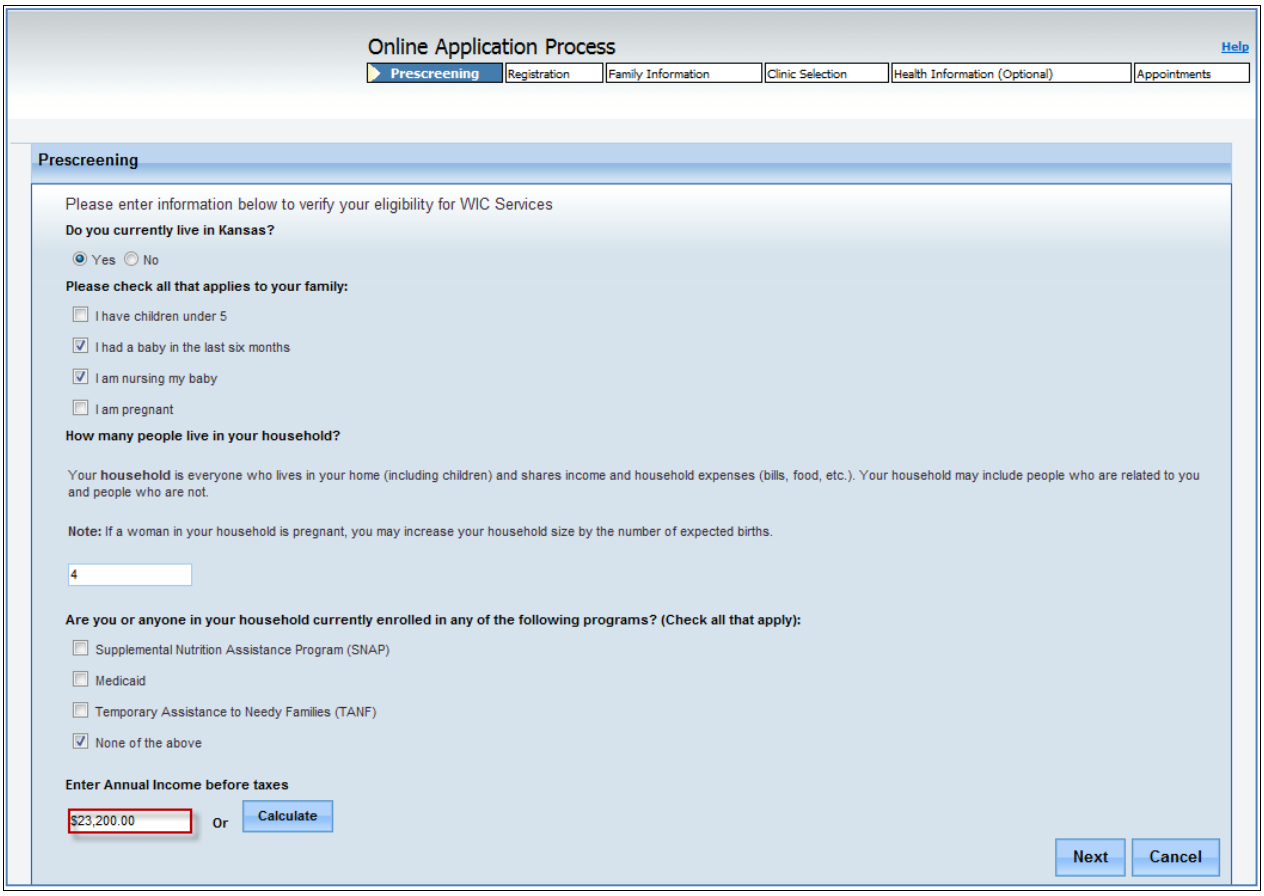
Potentially ineligible—income total appears to exceed guidelines

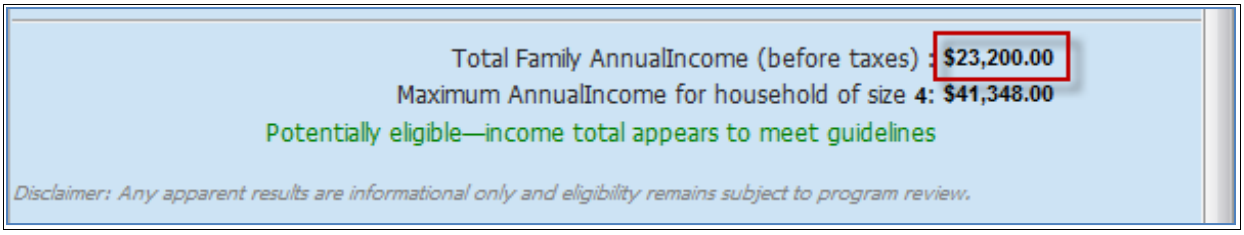
Disclaimer: Any apparent results are informational only and eligibility remains subject to program review.

OK Cancel

If either entering an amount in the Enter Annual Income before taxes text field or using the Income Screening Calculator denotes the total family income is over the maximum limit for the family size, Potentially ineligible – income total appears to exceed guidelines displays. A Notice of Ineligibility for income is generated.

7. Click **OK**. The screen refreshes and the **Prescreening** screen displays. The annual income matches the total family income on the **Income Screening Calculator**.





8. Click **Next**. The **Online – User Registration** screen displays. If all the potential eligibility requirements are met, (residence, category, and income), the next step in the process is registration.

Task B. Register Online

Online Application Process

Help

Prescreening | Registration | Family Information | Clinic Selection | Health Information (Optional) | Appointments

Online - User Registration

User Name *

Check Availability

Password *

4-character(s) minimum; 15-character(s) maximum; 1-uppercase character(s) minimum;

Confirm Password *

E-mail *

Security Question *

Please select one

Security Answer *

Word Verification *

Type the characters you see in the picture below.

43 8225 4

* Required Fields

Next | Cancel

Proceso de solicitud en línea

Ayuda

Preselección | Registro | Información Familiar | Selección de Clinica | Información de Salud (Opcional) | Citas

Registro de Usuario en Linea

Nombre de usuario *

Verifique Disponibilidad

Contraseña *

4-caracteres como mínimo; 15-caracteres como máximo; 1-caracter(es) en mayúsculas como mínimo;

Confirme su contraseña *

Correo Electrónico *

Pregunta de seguridad *

Por favor, seleccione una opción

Respuesta de seguridad *

Verificación del codigo *

Escribe los caracteres mostrados en la imagen siguiente:

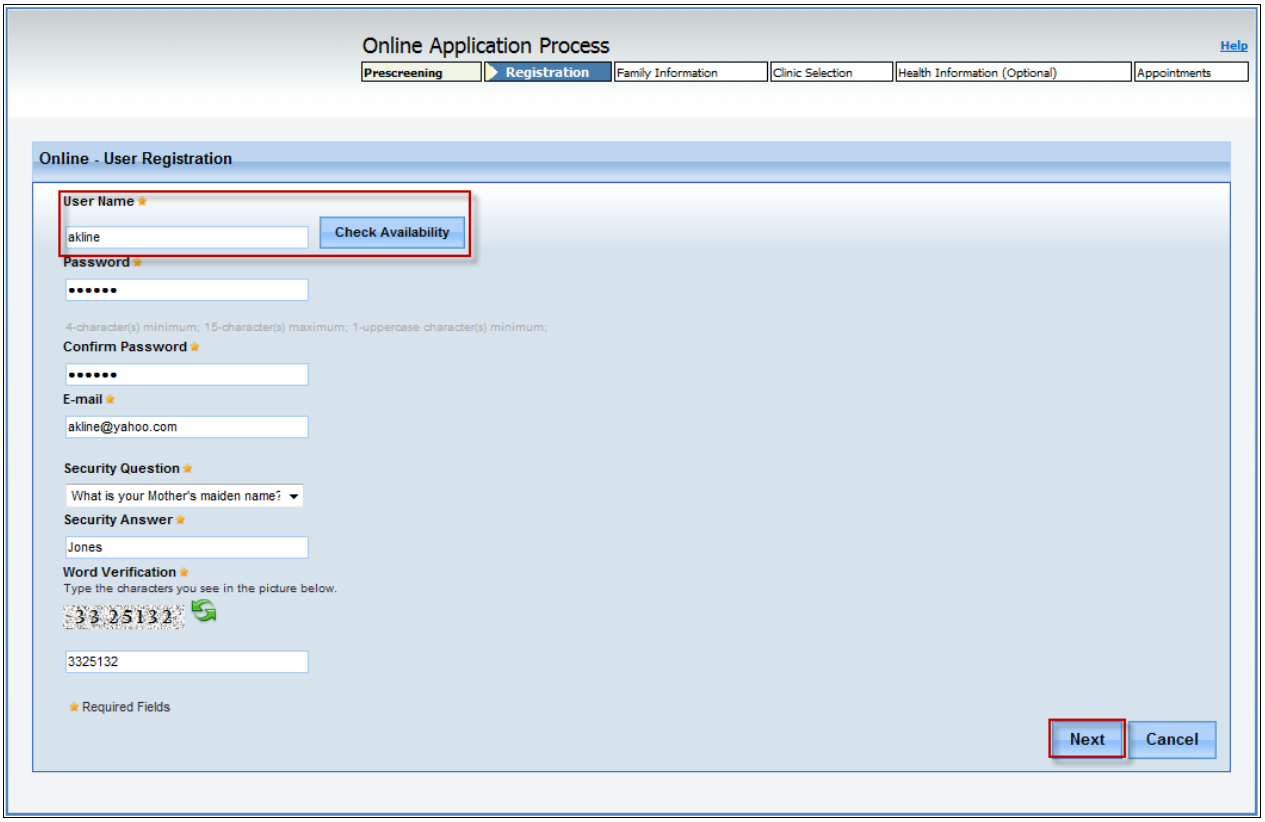
85 57 10 65

* Campos obligatorios.

Siguiente | Cancelar

Complete the following steps to perform this task:

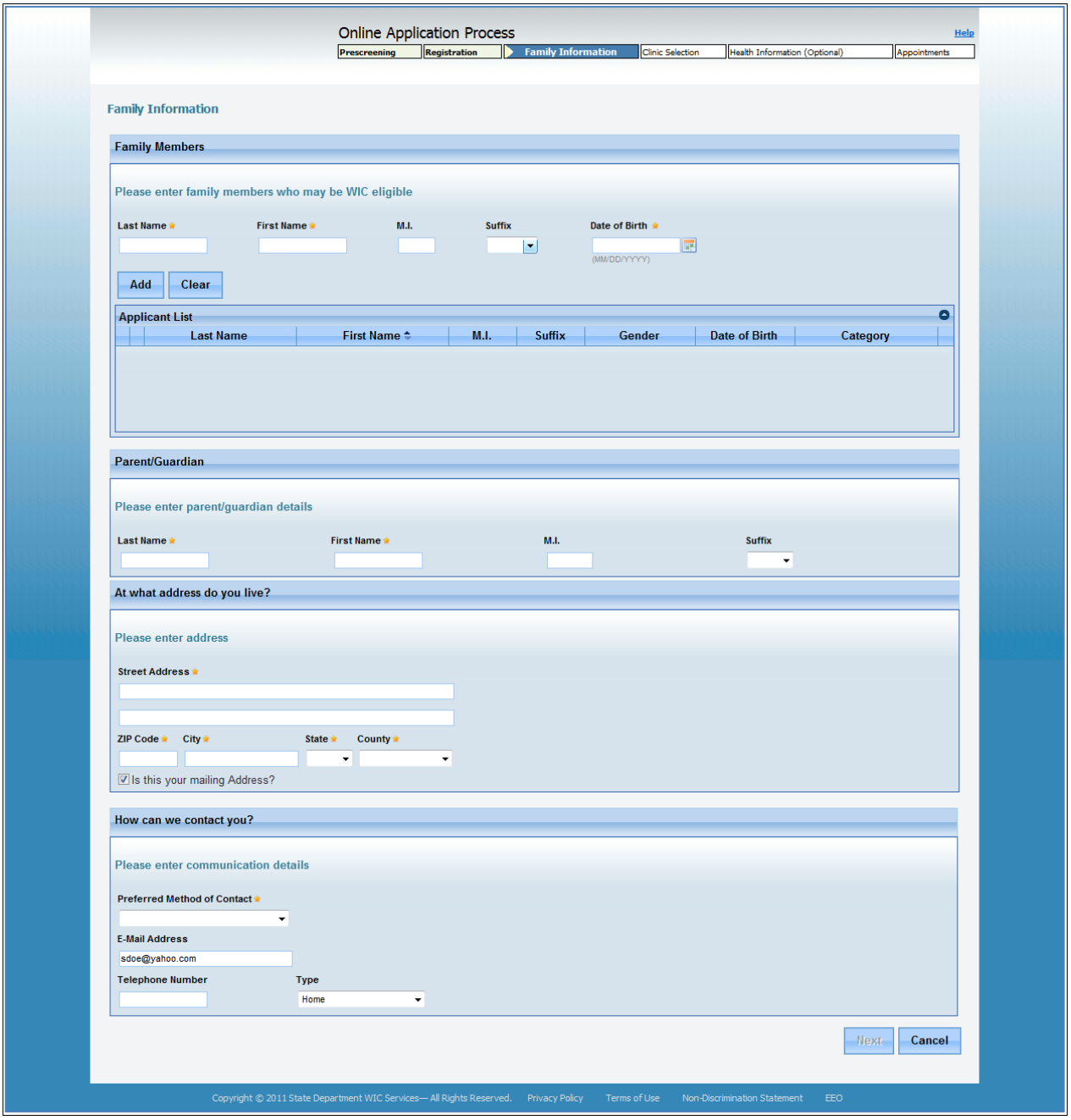
1. Complete the **Online User Registration** screen.
   - Create and enter a **User Name** in the **User Name** text field.
   - Click the **Check Availability** button to verify that the selected user ID is available since the user name is unique. A message will display stating that your user ID is available.
   - Create and enter a password in the **Password** text field. The password requirements are displayed below the **Password** text box.
   - Enter your password in the **Confirm Password** text box for verification.
   - Enter your e-mail address in the **E-mail** text field.
   - Select a security question option from the state-defined **Security Question** drop-down list.
   - Enter your response in the **Security Answer** text box.
   - Enter the characters displaying in the **Word Verification** text box.



2. Click **Next**. The screen refreshes and the **Family Information** screen displays. The user enters the applicant information, parent/guardian information, physical address, mailing address, and preferred method of contact.

Task C. Completing the Family Information Screen

After prescreening for eligibility and creating your user ID and password, the **Participant Portal** allows for the entry of potentially WIC eligible family members on the **Family Information** screen. There is no limit to the number of family members added as long as they meet the categorical eligibility requirements.



Proceso de solicitud en línea

Ayuda

Preselección | Registro | Información Familiar | Selección de Clinica | Información de Salud (Opcional) | Citas

Información Familiar

Miembros de familia

Por favor, introduzca todos los miembros de la familia que pueden ser elegibles al programa WIC

Apellido * | Nombre * | Inicial del segundo nombre | Sufijo | Fecha de Nacimiento * (MM/DD/AAAA)

Agregar | Borrar

Lista de candidatos

	Apellido	Nombre	Inicial del s	Sufijo	Género	Fecha de Nacimi	Categoría

Padres / Protectores

Por favor, introduzca los detalles de los padres / protectores

Apellido * | Nombre * | Inicial del segundo nombre | Sufijo

¿Cuál es su dirección de residencia?

Por favor, introduzca su dirección de residencia

Dirección *

Código Postal * | Ciudad * | Estado * | Condado *

☑ ¿Dirección de correo diferente a la dirección anterior?

¿Cómo podemos contactarnos con usted?

Por favor, introduzca sus datos personales de contacto

Método de contacto preferido *

Correo Electrónico: jsweet@yahoo.com

Número Telefónico | Tipo: Residencia

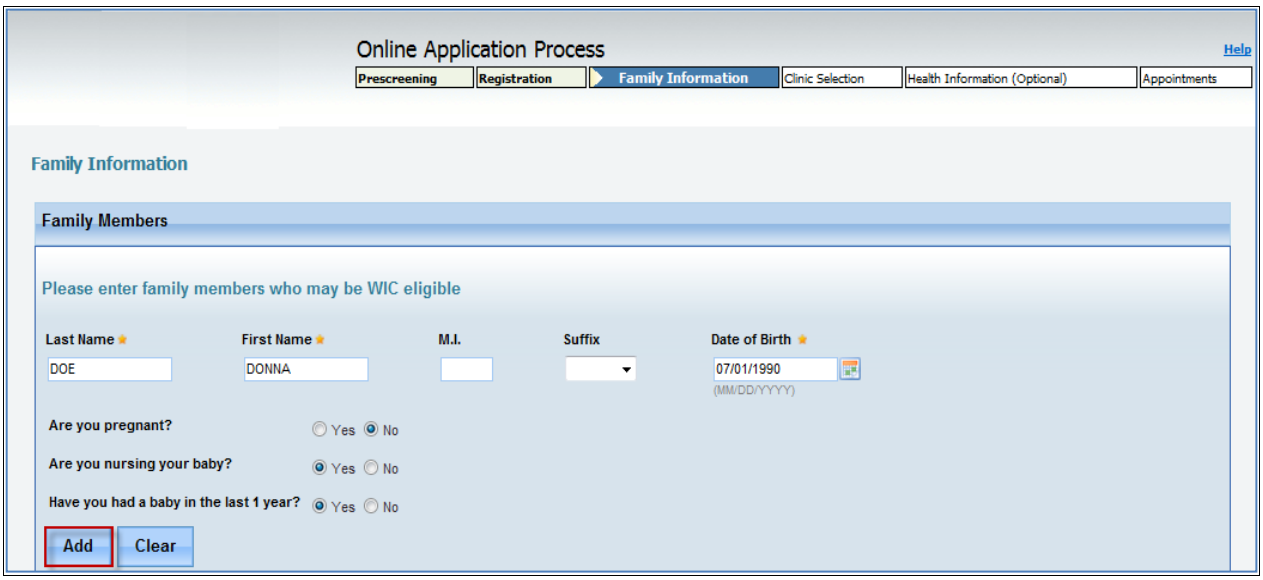
Siguiente | Cancelar

Copyright © 2011 Servicios WIC del Departamento de Estado-Todos los derechos reservados. Política de Privacidad | Términos de Uso | Declaración de No Discriminación | EEO

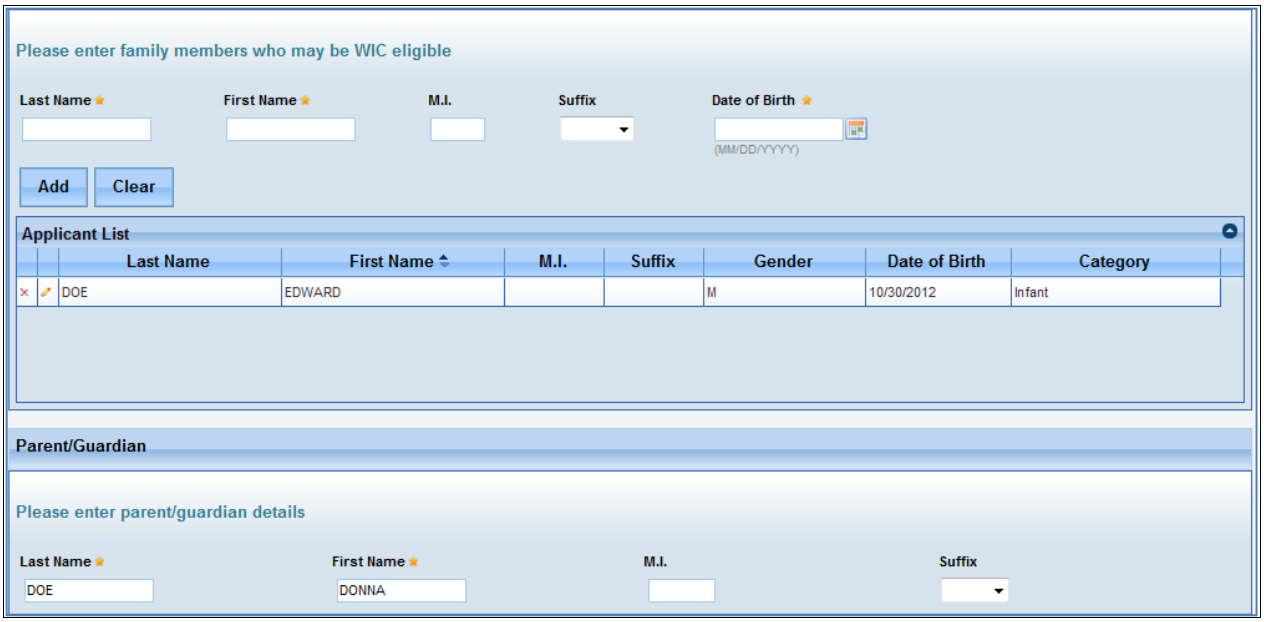
Complete the following steps to perform this task:

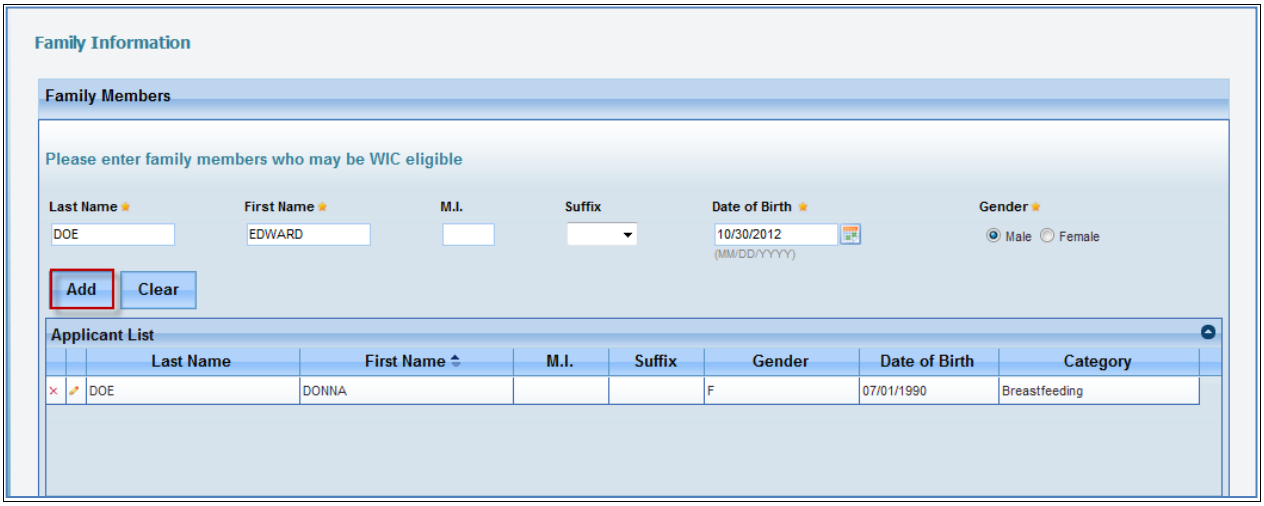
1. Within the **Family Members** group box, enter or select the following information:
   - **Last Name**
   - **First Name**
   - **M.I.**
   - **Suffix**
   - **Date of Birth**

If the individual is less than 61 months old based on the Date of Birth, the Gender field displays. If the age calculated from the Date of Birth is under five years old, three questions display to gather information for the woman's WIC category.



The first adult woman entered in the Participant section is deemed the Parent/Guardian. Upon completion of the Family Member section, the Parent/Guardian section will not display. If no adult woman is entered in the Family Members section, the Parent/Guardian section will display and prompt the user for information about the Parent/Guardian.





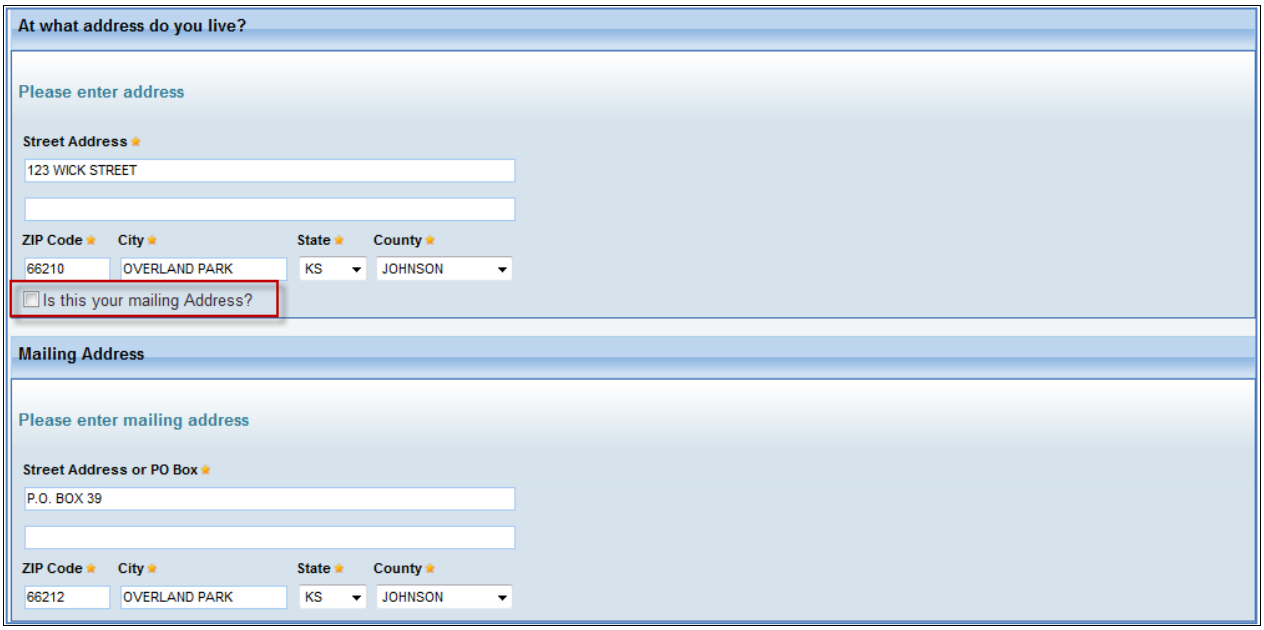
The date of birth text field is required and is used to determine the WIC category, which determines the additional fields displayed. If the individual is less than 61 months old based on the Date of Birth, the Gender radio buttons display. If the age is between eight and 65 years old, questions display to determine if the woman is categorically eligible for WIC as a pregnant, breastfeeding or non-breastfeeding woman.

2. Click **Add**. The screen refreshes and the participant information displays on the **Participant List** grid.

3. Within the **At what address do you live?** group box, enter the following information:
   - **Street Address**
   - **ZIP Code**
   - **City**

- Select the **State**
- Select the **County**

- Uncheck **Is this your mailing address**, if applicable. The screen will expand and display the **Mailing Address** group box.

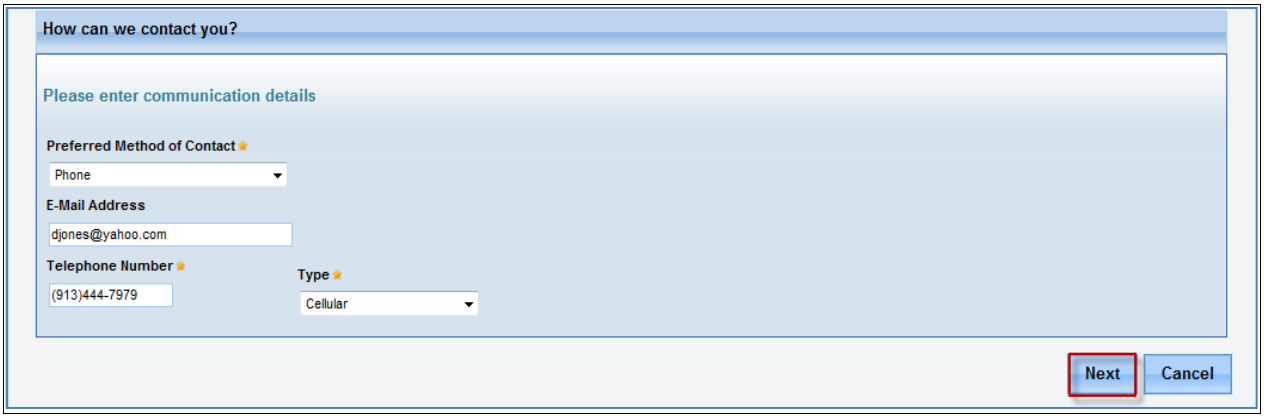


4. Within the **How can we contact you?** group box, enter the following communication details:

- Select the preferred method of contact from the **Preferred Method of Contact** drop-down list box.

> If Do Not Contact is selected, the family will be excluded from all forms of communication, including but not limited to mail and e-mail communications.

- Enter **E-mail Address**
- Enter **Telephone Number**
- Select the type of phone number from the **Type** drop-down list box.



5. Click **Next**. The screen refreshes and the **WIC Clinic Locations** screen displays.

Task D. Clinic Selection

Online Application Process

Help

Prescreening | Registration | Family Information | Clinic Selection | Health Information (Optional) | Appointments

Where are the WIC Clinics Near Me?

WIC clinics are conveniently located around the state. Enter your zip code and distance below then click search to get a list of clinics close to you. After you see the clinic list, you can click on Map to get driving directions.

WIC Clinic Locations

Find Appointments

ZIP Code: 66210

Find a clinic within: 5 Miles.

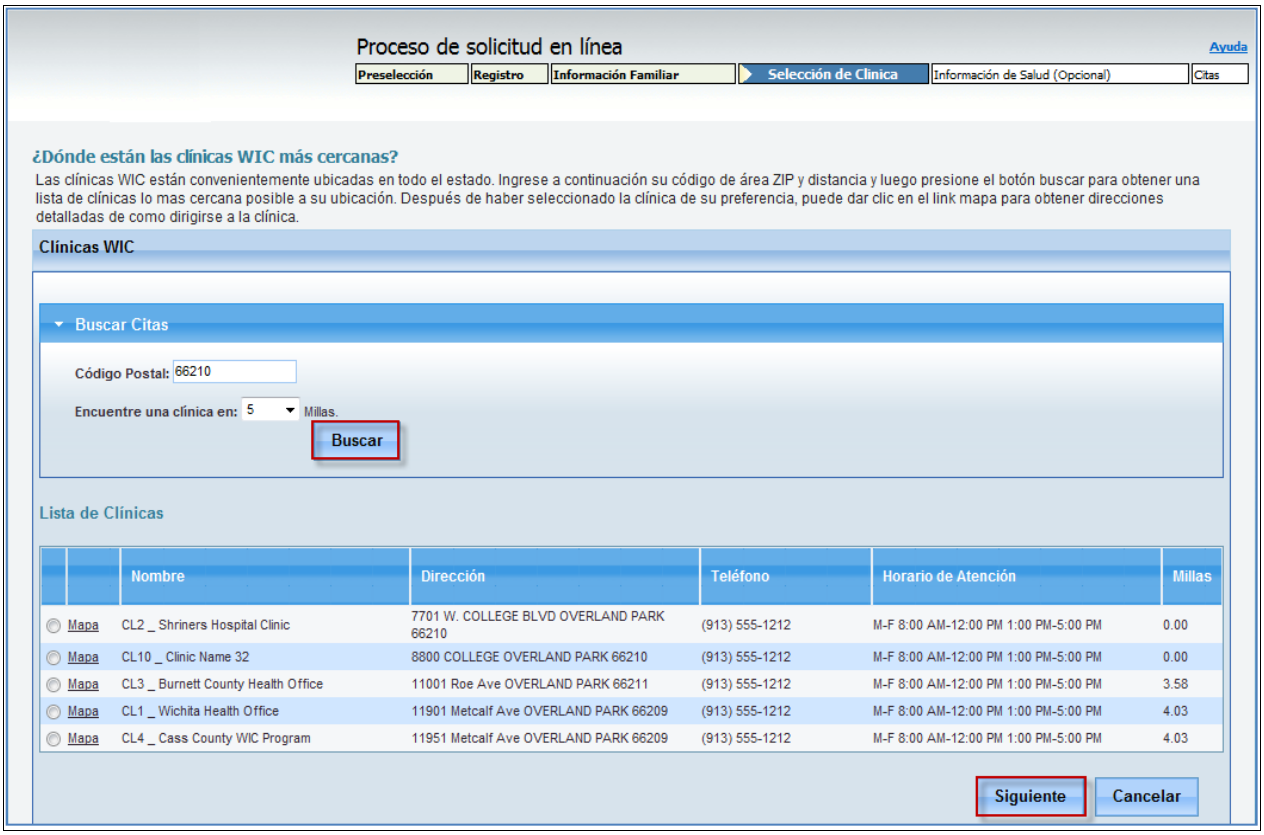
Find

Clinic List

		Name	Address	Phone	Hours	Miles
○	Map	CL5 _ Clinic Name 31	8001 COLLEGE BLVD OVERLAND PARK 66210	(913) 555-1212	M-F 8:30 AM-11:30 AM 12:30 PM-6:00 PM	2.53
○	Map	12345 _ X CLINIC	9111 WEST STREET OVERLAND PARK 66210	(913) 333-5555	M-F 8:00 AM-12:30 PM	2.53
○	Map	LA6NTEEBT _ NTE - EBT	7701 W COLLEGE BLVD OVERLAND PARK 66210	(913) 469-8700	M-F 8:00 AM-5:00 PM	2.53
◉	Map	CL2 _ Shenandoah Valley Medical System	10721 Roe Ave OVERLAND PARK 66211	(913) 555-1212	M-F 6:00 AM-12:00 PM 1:00 PM-6:30 PM	3.13
○	Map	CL3 _ Jefferson County WIC Program	11001 Roe Ave OVERLAND PARK 66211	(913) 555-1212	M-F 8:00 AM-12:00 PM 1:00 PM-5:00 PM	3.13
○	Map	CL1 _ Central WV WIC Program	11901 Metcalf Ave OVERLAND PARK 66209	(913) 555-1212	M-F 8:00 AM-12:00 PM 1:00 PM-8:00 PM	4.62
○	Map	CL4 _ Morgan County WIC Program	11951 Metcalf Ave OVERLAND PARK 66209	(913) 555-1212	M-F 8:00 AM-12:00 PM 1:00 PM-5:00 PM	4.62

Next | Cancel

The WIC Clinic Locations screen allows the user to select a clinic. For new users, the display is based on the ZIP Code, distance radius within the ZIP Code and defaults resulting from the Zip Code entered in the Family Information section. The Zip Code and Find a clinic within can be changed. The display is based on the individual's search criteria. For an existing user, the clinic location is based on their assigned clinic.



Complete the following steps to perform this task:

1. Within the **Find Appointments** group box, enter the following:
   - **ZIP Code**
   - **Find a clinic within <number value> miles**.
   - Click **Find**. The clinics display on the **Clinic List** grid.
   - Click the radio button next to the desired clinic location.
2. Click **Next**. The screen refreshes and the **Health Information** screen displays.

> Clicking on the Map hyperlink on the Clinic List Grid will redirect the user to Google Maps for directions to the various clinics listed on the grid.

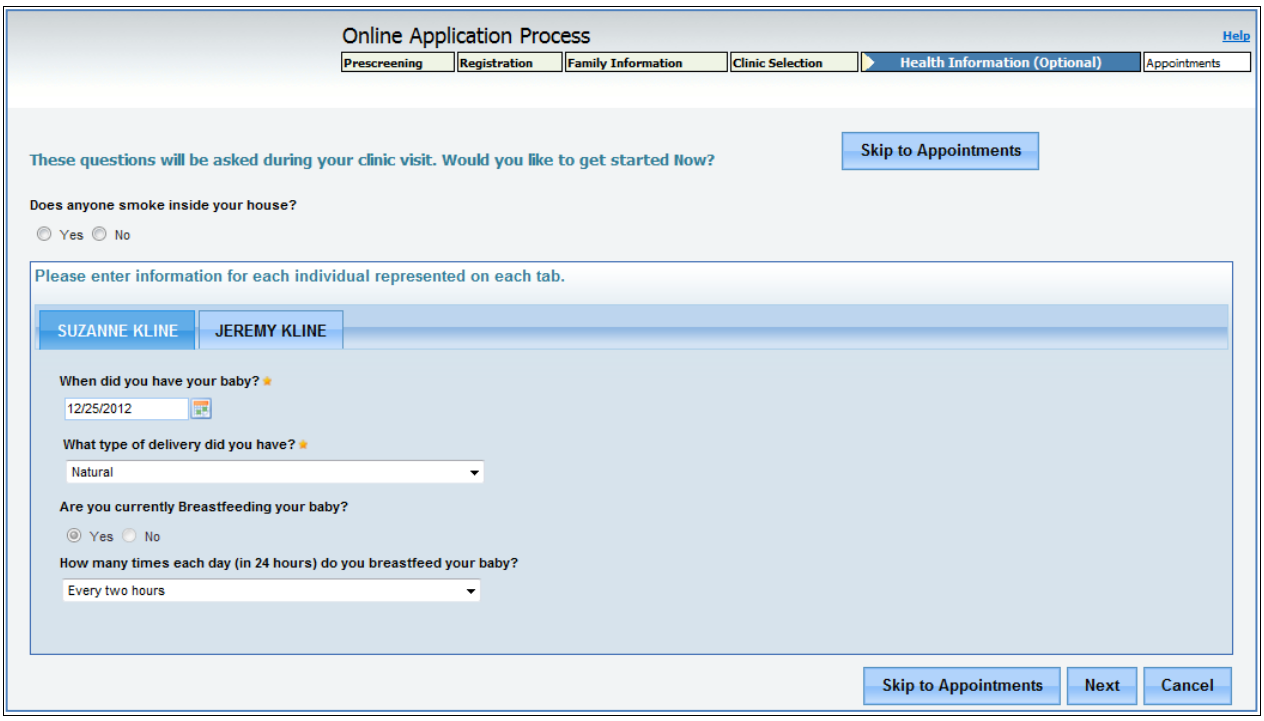
Task E. Health Information (Optional)

The user has the option to complete the Health Information section or immediately click on the Skip to Appointments button to schedule an appointment. In this task, the user will complete the Health Information section. The screen allows the individual to respond to various health questions for each individual.

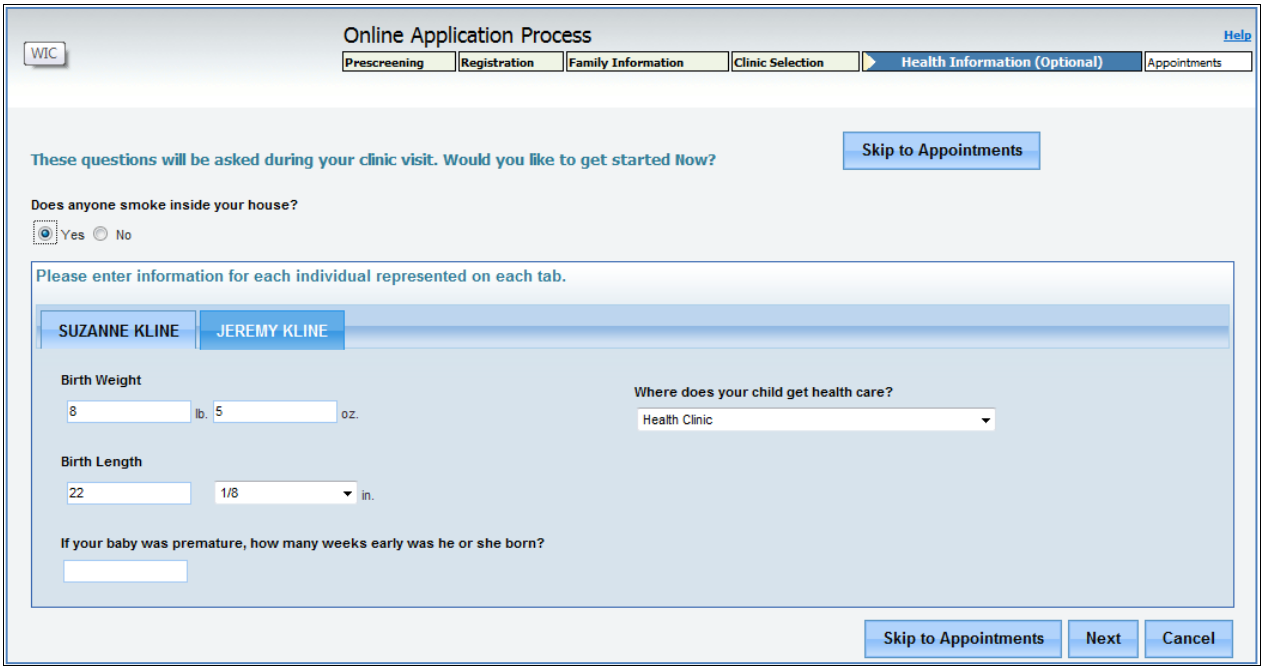
Complete the following steps regarding a breastfeeding mom to perform this task:

1. Click a **Radio Button** in response to **Does anyone smoke inside your house**?
2. Please enter the information for each individual represented on each tab by answering all of the following:
   - Enter or select the date in response to **When did you have your baby?**
   - Select **What type of delivery did you have**?
   - The response to **Are you currently Breastfeeding your baby?** defaults from the **Family Information** screen.
   - Select **How many times each day (in 24 hours) do you breastfeed your baby**.

When entering a date in the What date did your last menstrual period start? The system automatically calculates the baby's due date. When entering the due date, the system automatically calculates the starting date of the last menstrual period.



1. Please enter the information for each individual represented on each tab by entering of selecting all of the following:
   - Enter **Birth Weight.**
   - Select **Where does your child get health care?**
   - **Enter Birth Length.**
   - **Enter If your baby was premature, how many weeks early was he or she born?** If applicable.



2. Click **Next**. The system refreshes and the **Appointment Scheduling** screen displays.

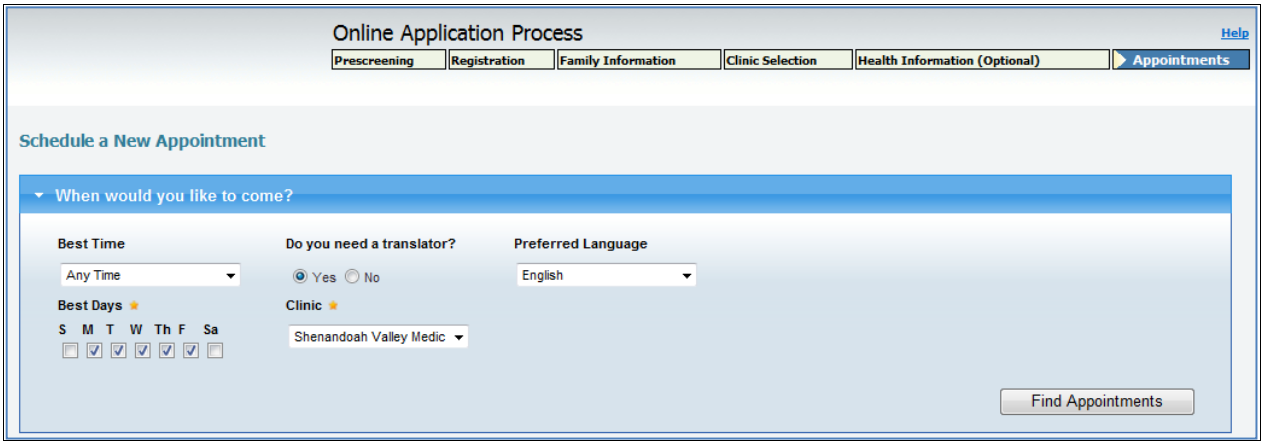
For a pregnant women, when entering a date in the What date did your last menstrual period start? The system automatically calculates the baby's due date. When entering the due date, the system automatically calculates the starting date of the last menstrual period.

Task F. Appointment Scheduling

This screen allows the individual to setup a family appointment.

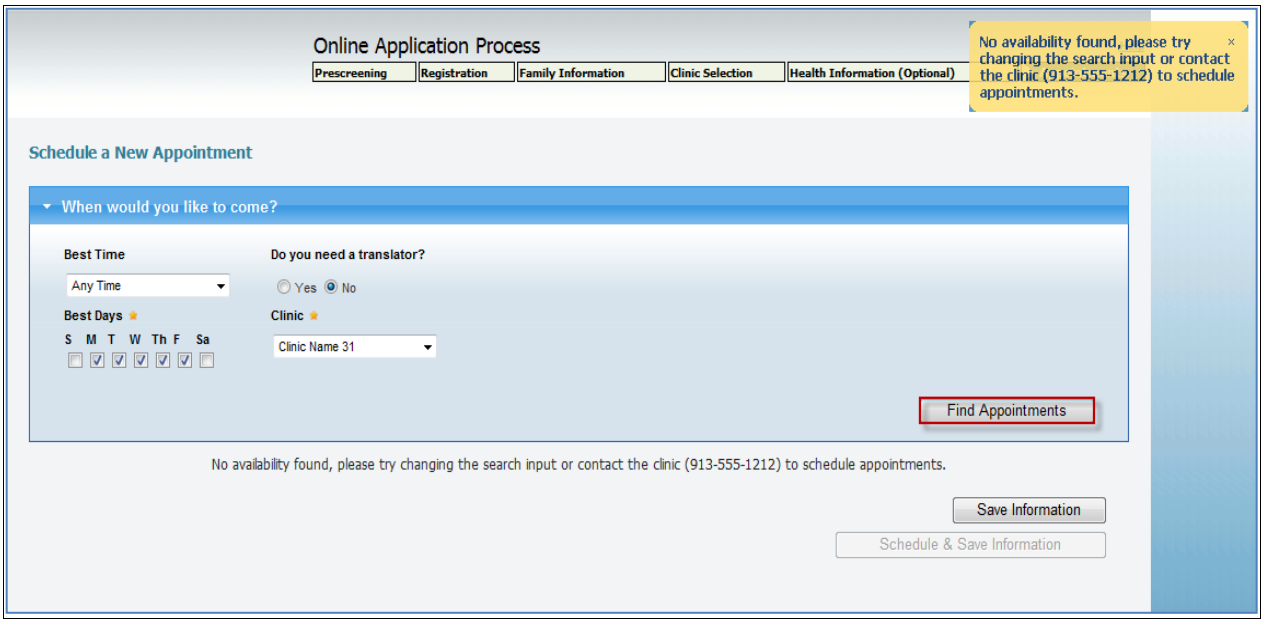
Complete the following steps to perform this task:

1. Within the **When would you like to come?** group box, complete the following:
   - Select a time from the **Best Time** drop-down list box.
   - Select preferred appointment days from the **Best Days** check boxes.
   - Click a radio button in response to **Do you need a translator**? If the response is **Yes**, the **Preferred Language** drop-down list box displays.



- Select a clinic from the **Clinic** drop-down list box.

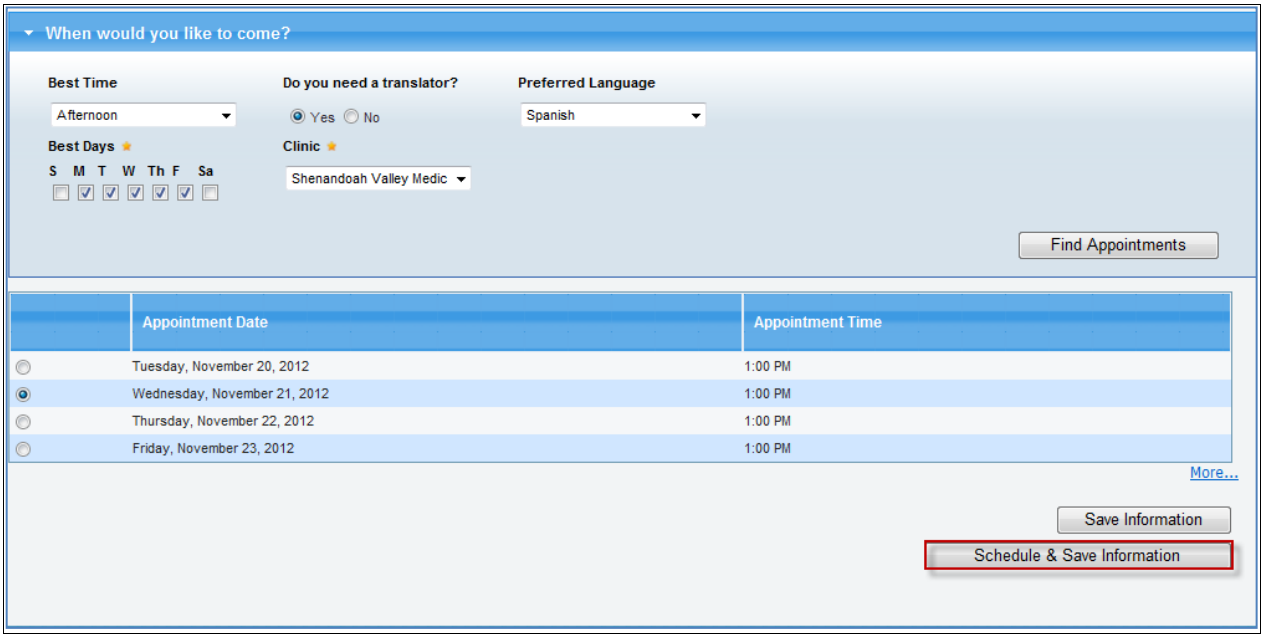
2. Click **Find Appointments**. The system searches the database for available appointments based on the entered criteria. If no appointments are found, the message No Availability found, please try changing the search input or contact the clinic <phone number> to schedule appointments will display at the bottom of the screen.



If there are no available appointments found, the applicant can choose to either modify the search criteria or save the information, which is stored in the participant's record. In this task, the search criteria are modified to search for other available appointments.

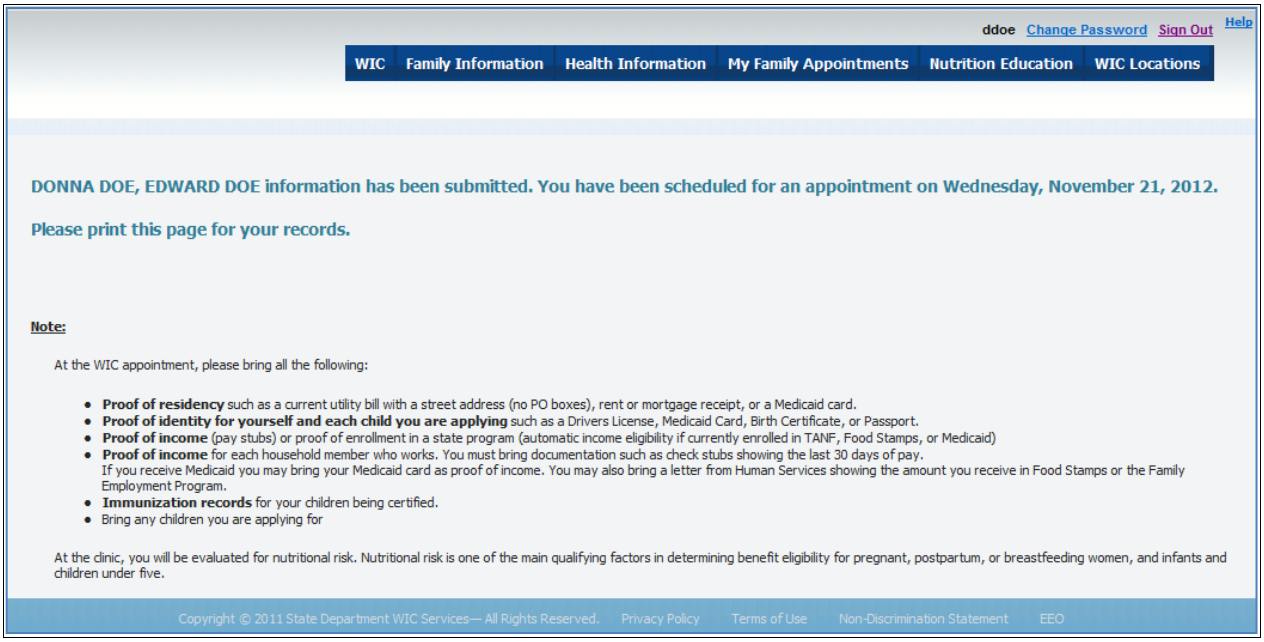
3. Click **Find Appointments**. The screen refreshes and available appointments display on the grid. The first appointment date and time on the grid is the defaulted selection.

4. Click the **Radio Button** next to the preferred appointment.



5. Click **Schedule & Save Information**. The screen refreshes and the applicant is redirected to the main screen for a new user, where pertinent information displays regarding the applicant's clinic visit and the **Family Appointment** is confirmed.

6. Click the **Save Information** button to save the family application and user registration and redirects the user to the **Prescreening Save Confirmation** screen.



With a User Name and Password, the Health Information and Nutrition Education tabs will display at the top of the screen. This allows the registered user direct access to the Participant Portal to edit Family Information, Health Information and Family Appointments as well as schedule a new Family Appointment.

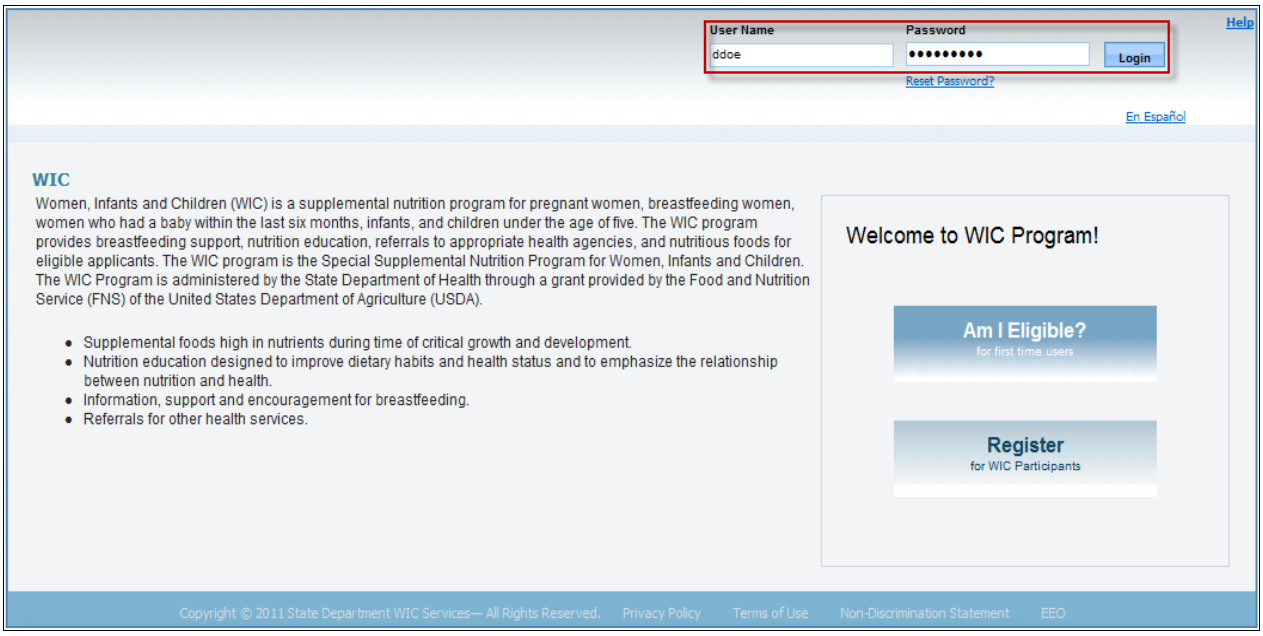
Task G. Accessing the Participant Portal with a registered User Name and Password.

After successfully logging into the Participant Portal, an active Certified / Registered participant in the WIC program has access to modify family information, schedule a family appointment, select a nutrition education class, and choose a WIC clinic location.

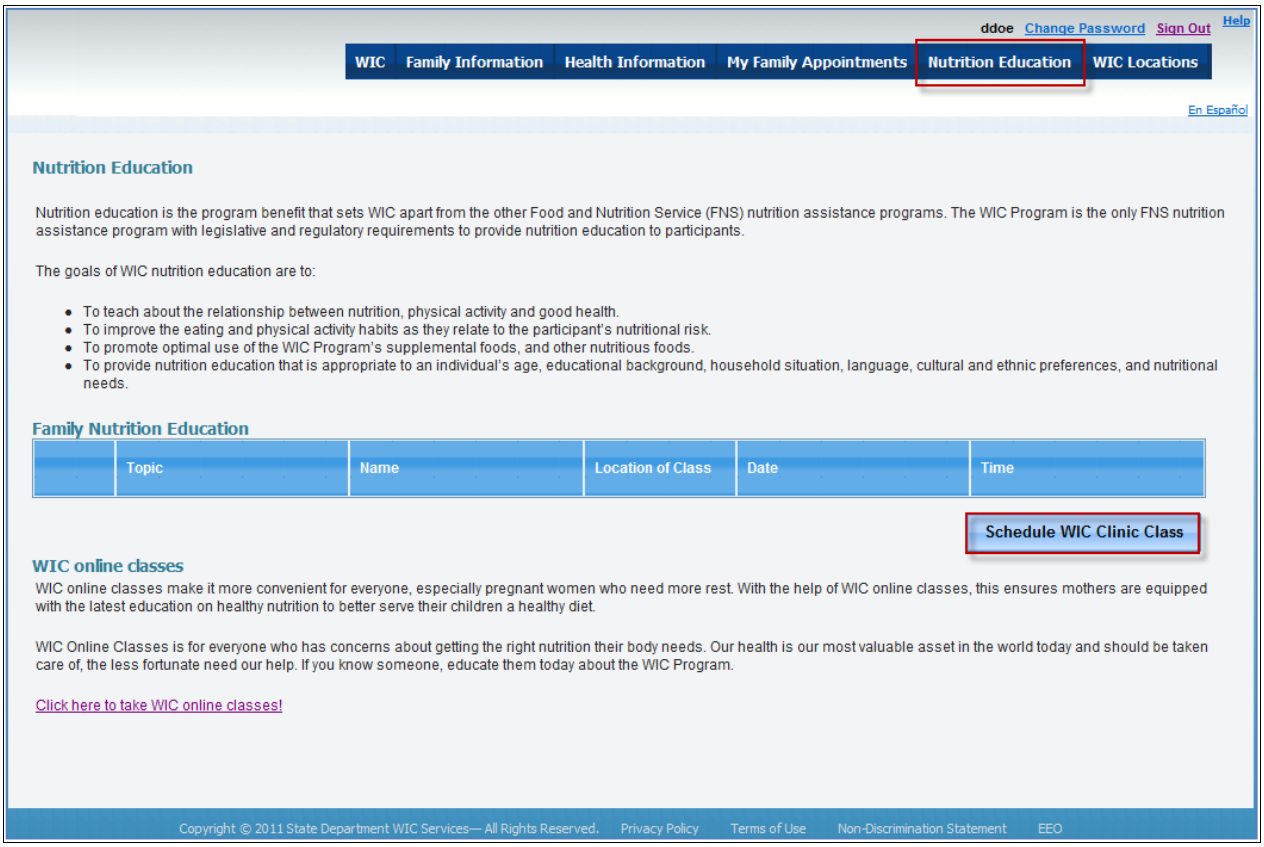
In this task, the user will schedule a WIC clinic class.

Complete the following steps to perform this task:

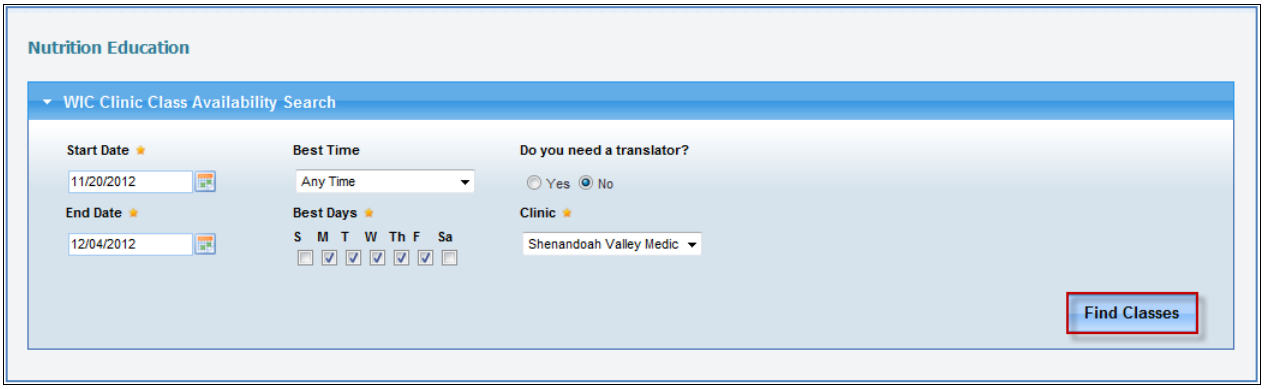
1. Enter your unique user name in the **User Name** field box.
2. Click the **Login** button. The screen refreshes and the **Participants – Home** screen displays.



3. Click the **Nutrition Education** tab. The **Nutrition Education** screen displays.



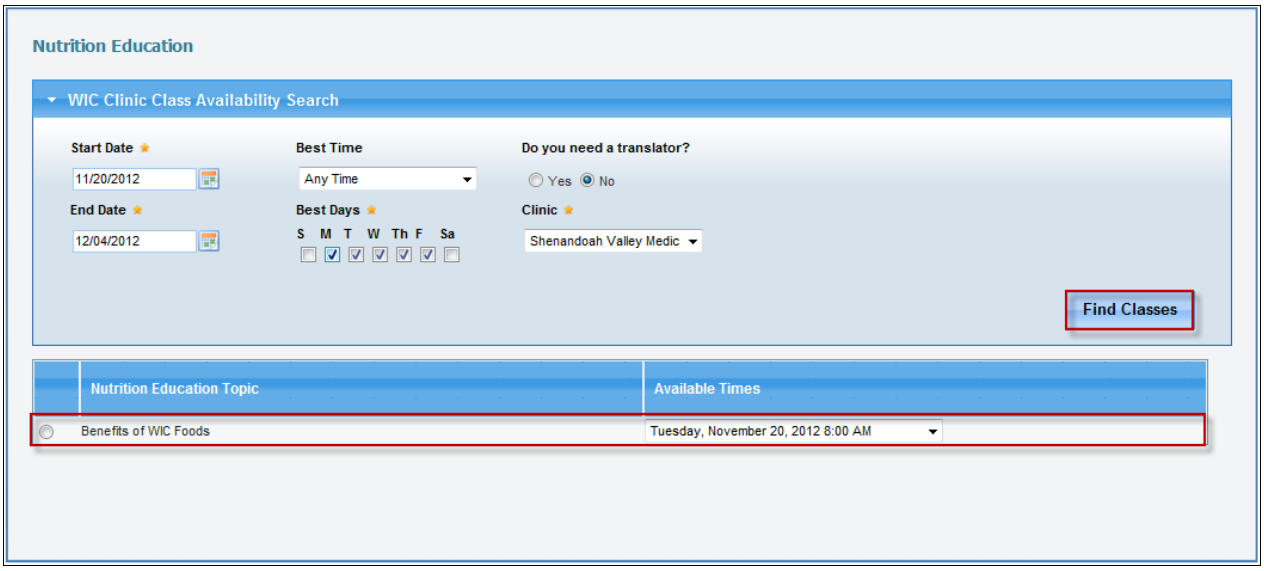
4. Click the **Schedule WIC Clinic Class** button. The **Nutrition Education WIC Clinic Class Availability Search** screen displays.



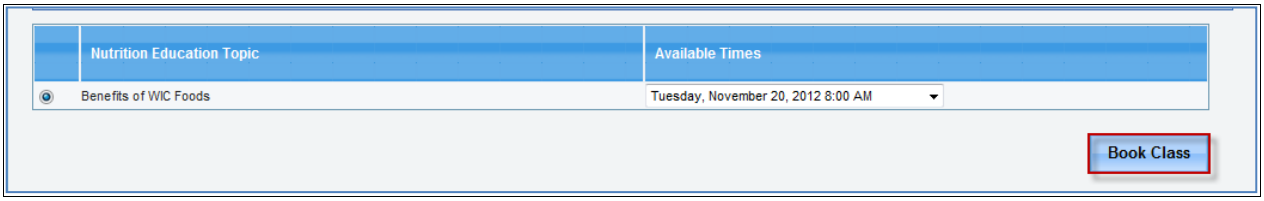
5. Enter or select the following:

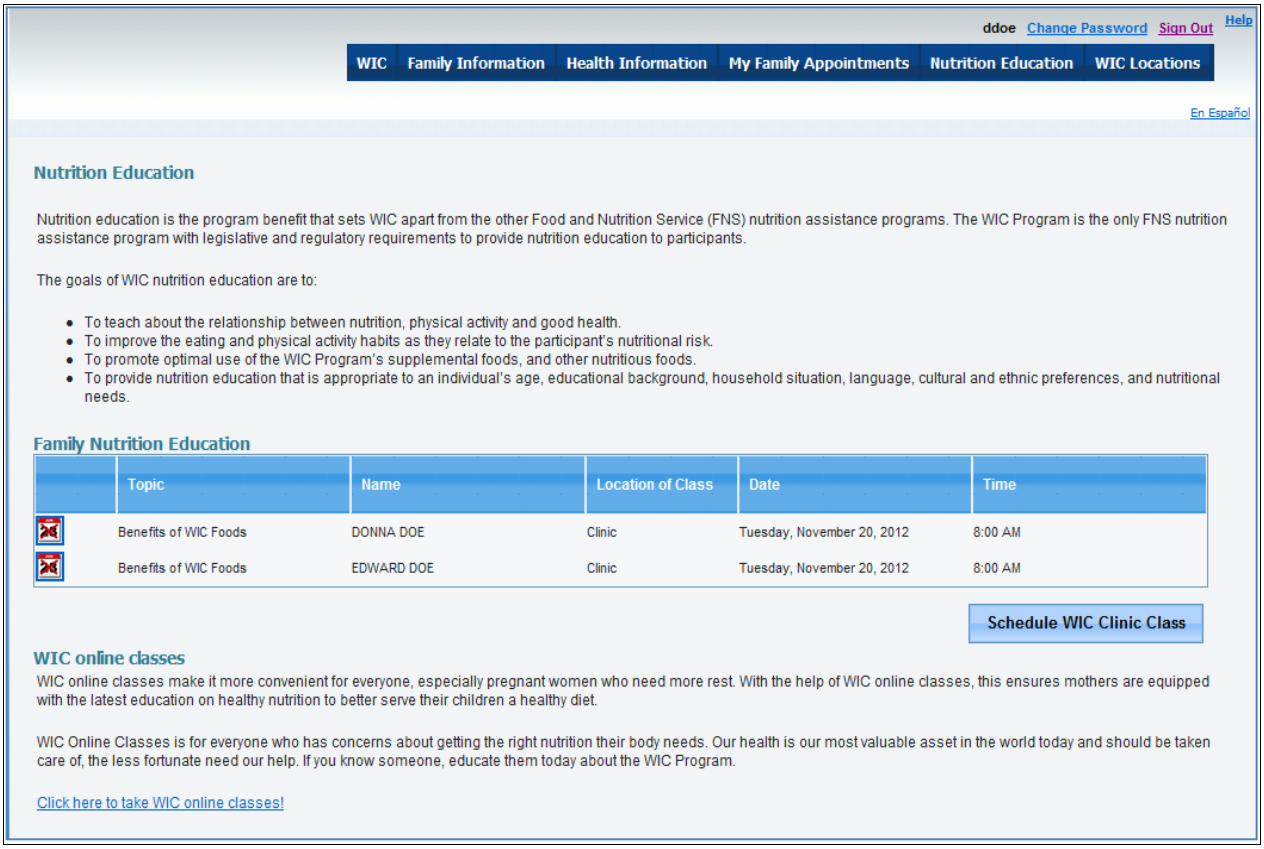
- **Start Date**
- **End Date**
- **Preferred Time**
- **Preferred Days**
- **Do you need a translator**
- **Clinic**

6. Click the **Find Classes** button. The system searches the database for class availability based on the selected criteria.



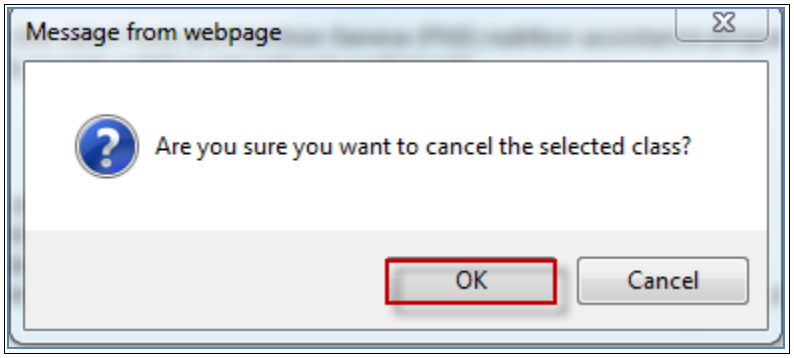
7. Click the radio button to select the nutrition education topic and available time.
8. Click the **Book Class** button. The system refreshes and the selected class displays on the **Family Nutrition Education** screen.



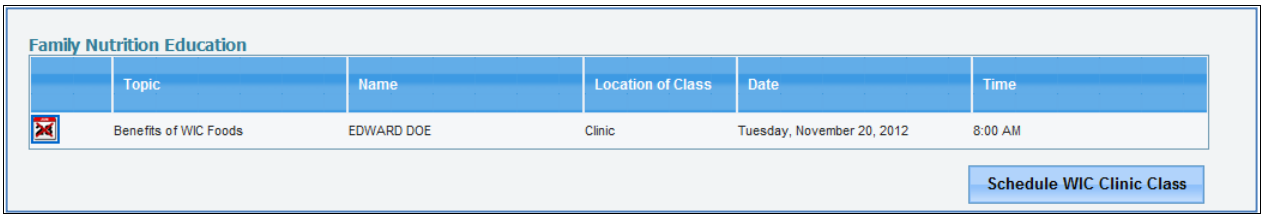


Family Nutrition Education classes can only be cancelled not rescheduled. A new appointment is scheduled if necessary.

9. Click the **Cancellation** button. A confirmation message displays.



10. Click **OK**. The screen refreshes and the cancelled class no longer displays on the **Family Nutrition Education** grid.



The Participant can also schedule online classes making it more convenient for everyone, especially pregnant women who need more rest .Offering an online classes will ensure mothers are equipped with the latest education on healthy nutrition to better serve their children a healthy diet.

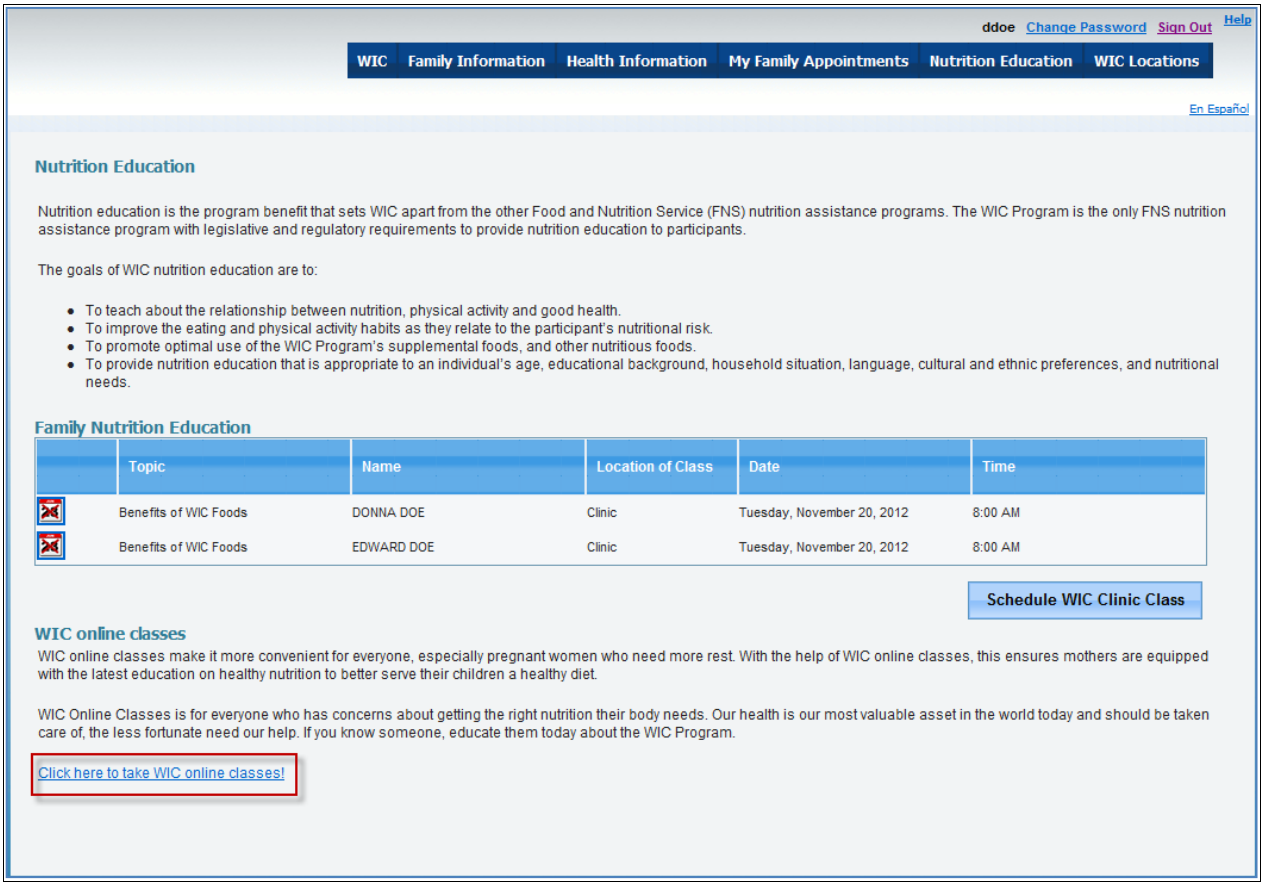
Task H. Taking Online Classes

There is a web service for communications between Health Bites and Crossroads. Health Bites will redirect users to the Participant Portal for user authentication. The Participant Portal will make an internal data service call to Crossroads for ID validation at user login. When a WIC participant has completed all the required content material on Health Bites, the data will be submitted to the Crossroads database.

Complete the following steps to perform this task:

1. Enter the **User Name** and **Password**. The **Family Members – Home** screen displays.

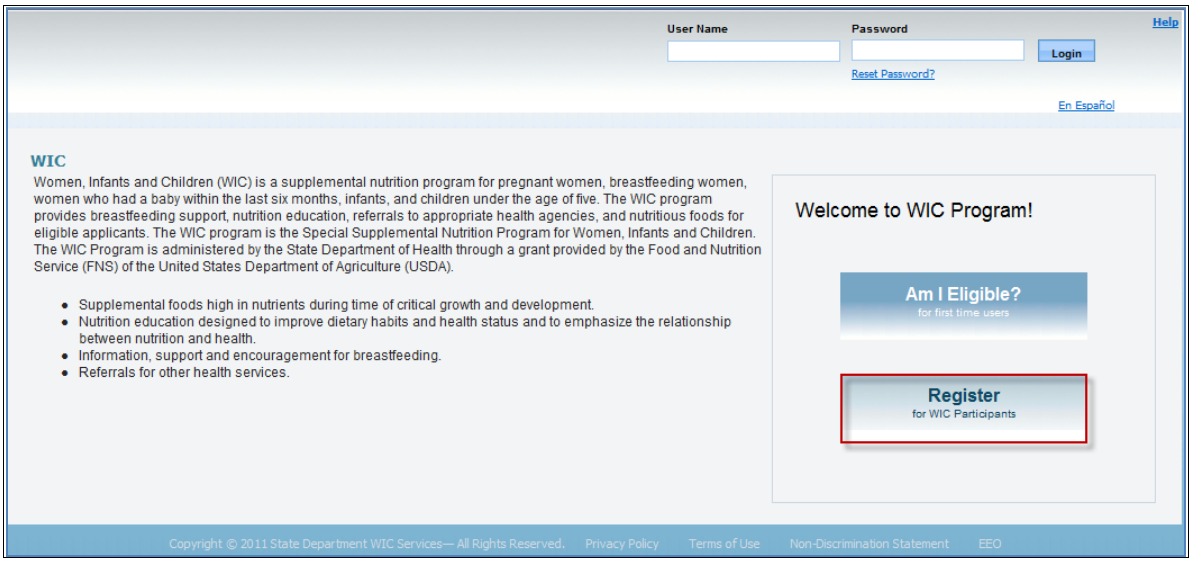
2. Select the **Click here to take WIC online classes** link. The Health Bites website displays.



When the Nutrition Education data is received in Crossroads, data will be validated and Nutrition Education credit will be given to the participant.

Task I. Registering as a WIC Participant

Another option on the main portal screen allows a WIC participant to register into the Participant Portal through the Internet. The process is shorter since the individual is already an active participant within WIC services. Since all the fields are mandatory, the participant must know their family ID number and last name, or their EBT care number if EBT is available in their state, and the parent/guardian1 date of birth.

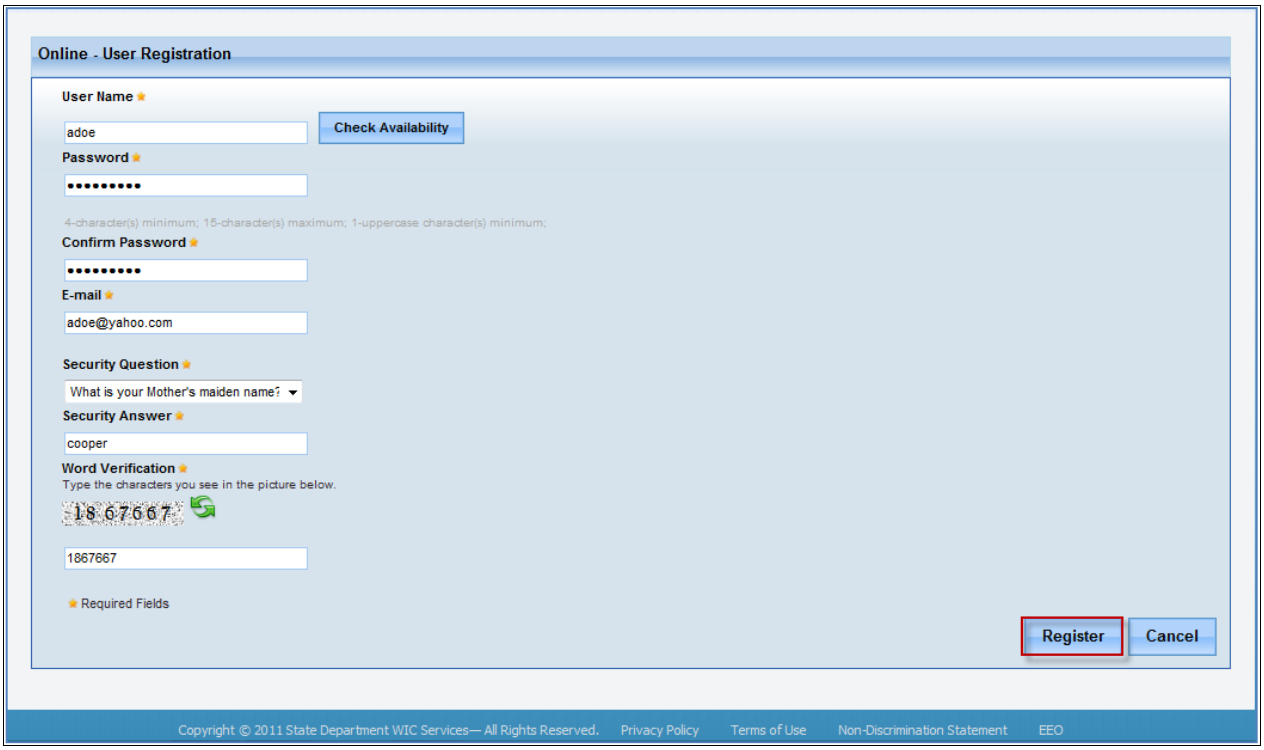


Complete the following steps to perform this task:

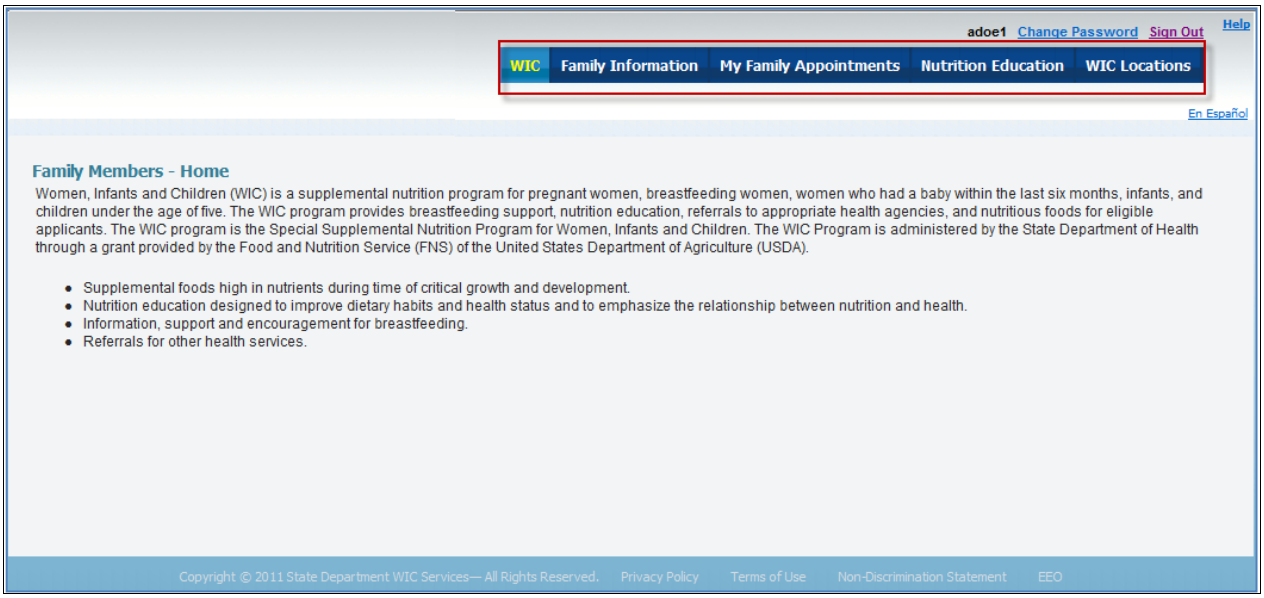
1. Click **Register for WIC Participants**. The **Existing WIC Participants** screen displays.

2. Within the **Existing WIC Participant** group box, enter or select the following:
   - Enter the **Family ID** number or **EBT Card #**.
   - Enter **Family Last Name**.
   - Enter **Parent Guardian 1 Date of Birth**.

3. Click **Create Login**. The screen refreshes and the **Online – User Registration** screen displays.
4. Complete the **User Registration** screen. Refer to Task B, step 1.



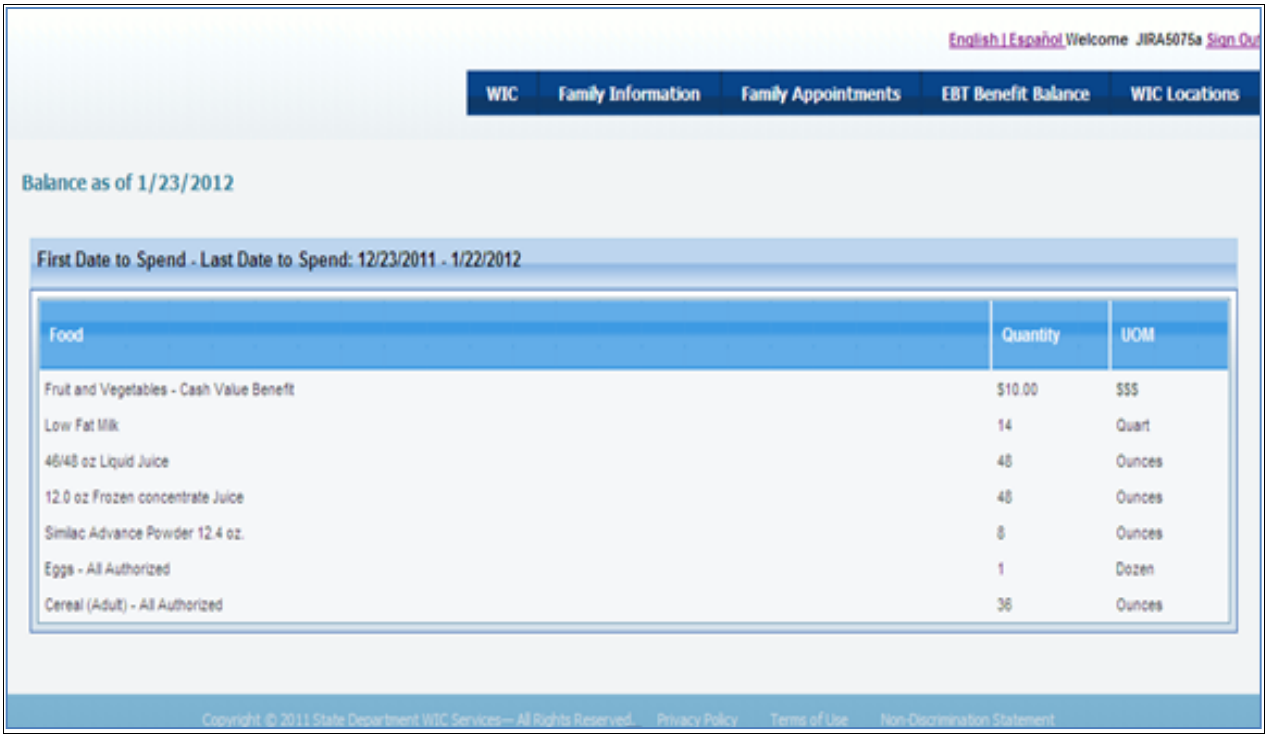
5. Click **Register**. The screen refreshes and the **Family Members – Home** screen displays.



The EBT Benefit Balance tab directs the user to print an EBT shopping list. The shopping list displays the WIC Participants' EBT balance as of the day the screen is displayed. The tab displays

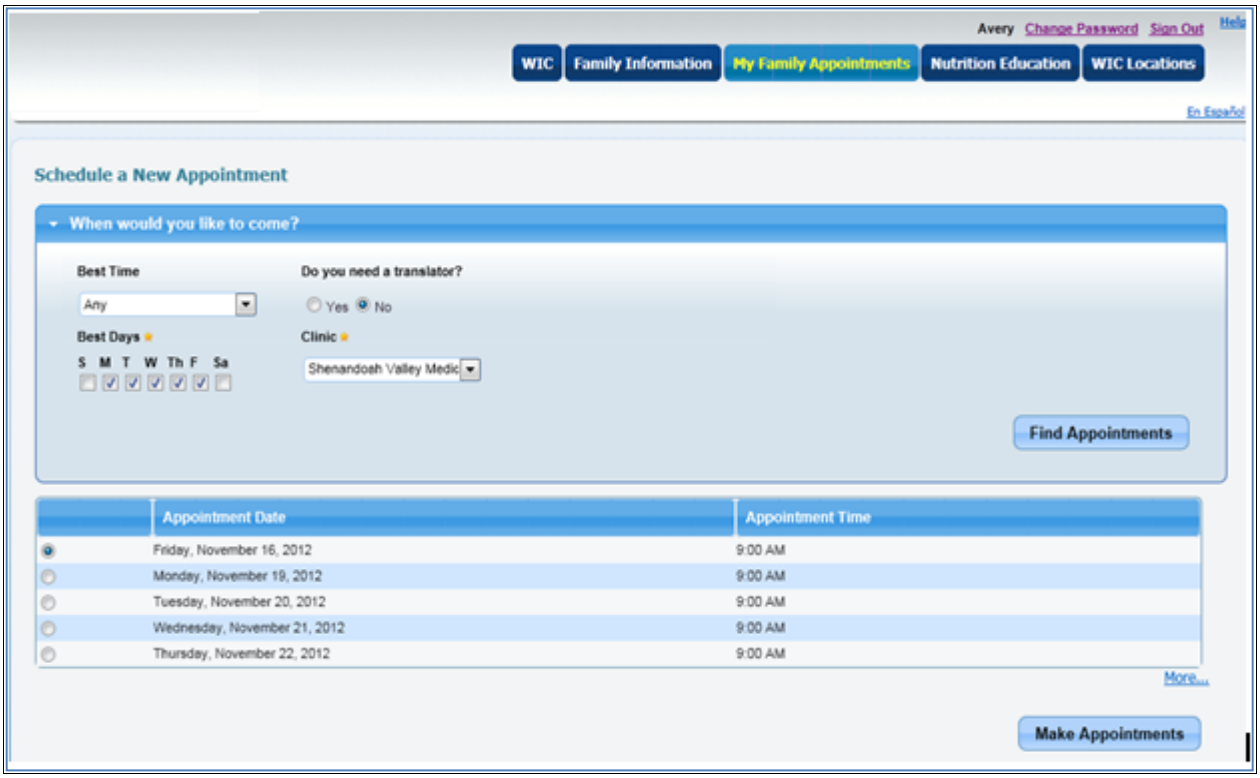
when the state defined option is enabled.

The EBT Benefit Balance screen within the Participant Portal stores no information in the Crossroads database. This screen and its data are completely dependent on a successful connection to the EBT host.

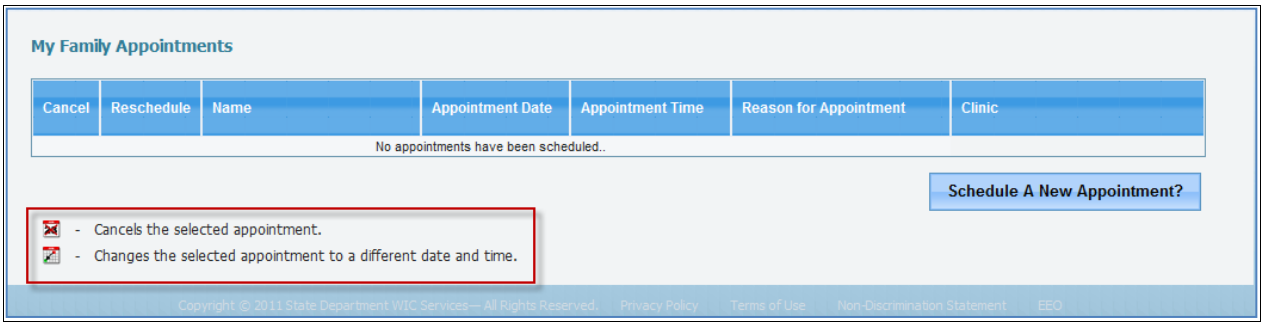


Task J. Cancel Family Appointments

The **Family Appointments** screen allows the registered user to cancel an appointment for the family.



When canceling, rescheduling or adding appointments, it is for the entire family, not the individual family member even if the appointment type is different. Crossroads determines the appointment type.


My Family Appointments
Cancel
Reschedule
Name
Appointment Date
Appointment Time
Reason for Appointment
Clinic
No appointments have been scheduled..
Schedule A New Appointment?
- Cancels the selected appointment.
- Changes the selected appointment to a different date and time.
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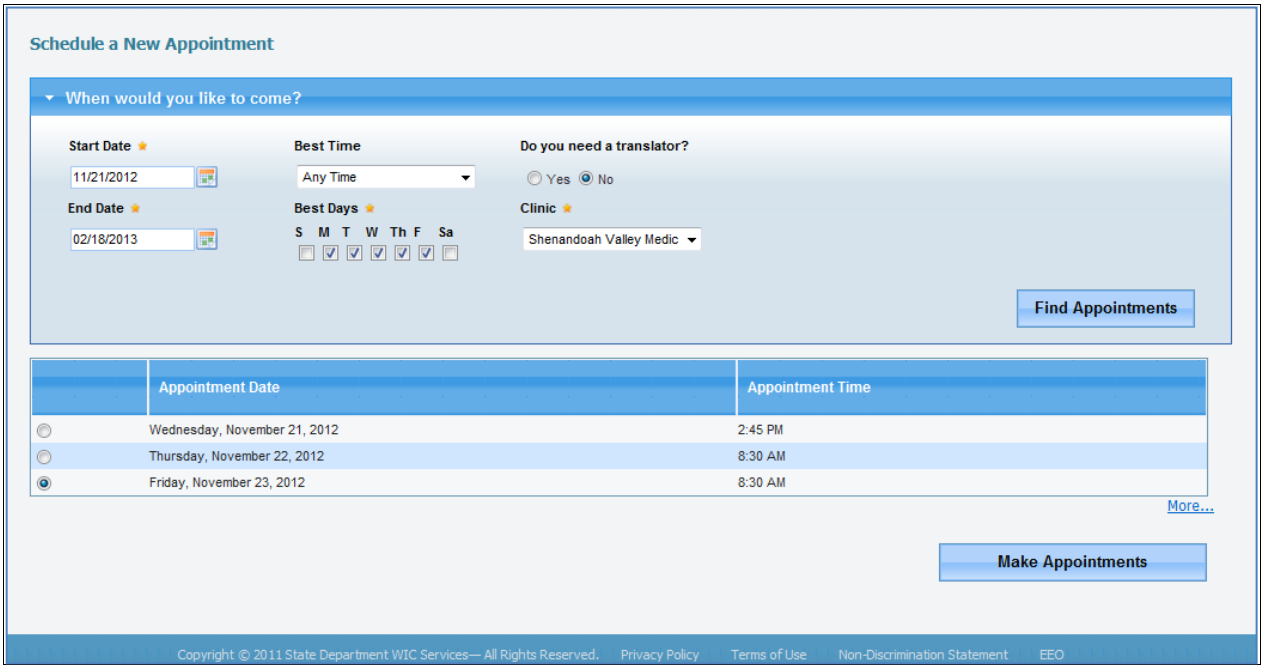
Terms of Use
Non-Discrimination Statement
EEO


Schedule a New Appointment
When would you like to come?
Start Date
11/21/2012
End Date
02/18/2013
Best Time
Any Time
Best Days
S M T W Th F Sa
Do you need a translator?
Yes
No
Clinic
Shenandoah Valley Medic
Find Appointments
Appointment Date
Appointment Time
Wednesday, November 21, 2012
2:45 PM
Thursday, November 22, 2012
8:30 AM
Friday, November 23, 2012
8:30 AM
More...
Make Appointments
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Privacy Policy
Terms of Use
Non-Discrimination Statement
EEO

My Family Appointments
Cancel
Reschedule
Name
Appointment Date
Appointment Time
Reason for Appointment
Clinic
ARETHA DOE
11/23/2012
8:30 AM To 9:00 AM
Food Benefit Issuance
Shenandoah Valley Medical System
TITUS DOE
11/23/2012
9:00 AM To 9:30 AM
Food Benefit Issuance
Shenandoah Valley Medical System
Schedule A New Appointment?
- Cancels the selected appointment.
- Changes the selected appointment to a different date and time.
Copyright © 2011 State Department WIC Services— All Rights Reserved.
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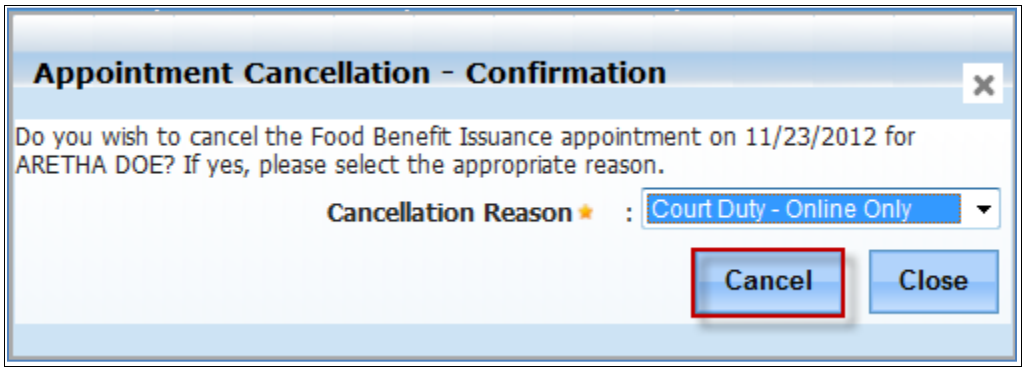
Non-Discrimination Statement
EEO

Complete the following steps to perform this task:

1. Click the **Cancel** button in the **My Family Appointments** list for the selected appointment. The **Appointment Cancellation – Confirmation** screen displays.

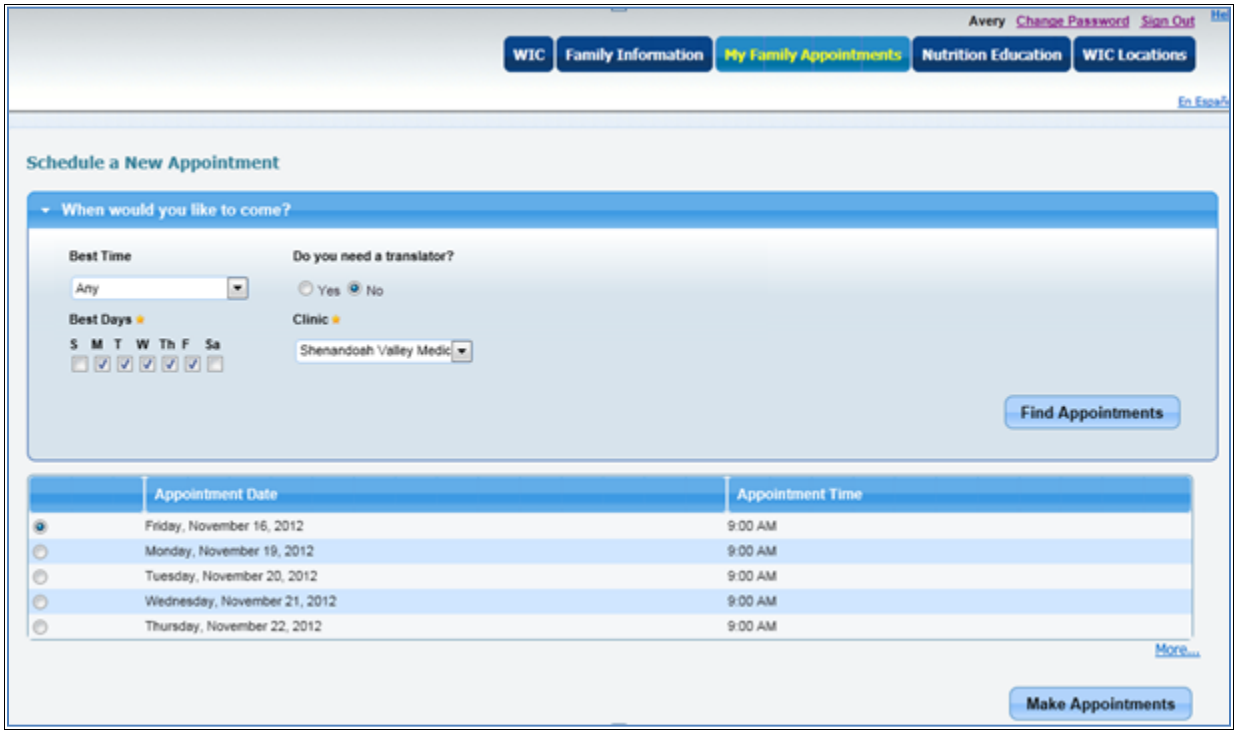
2. Select the **Cancellation Reason** from the drop down list.

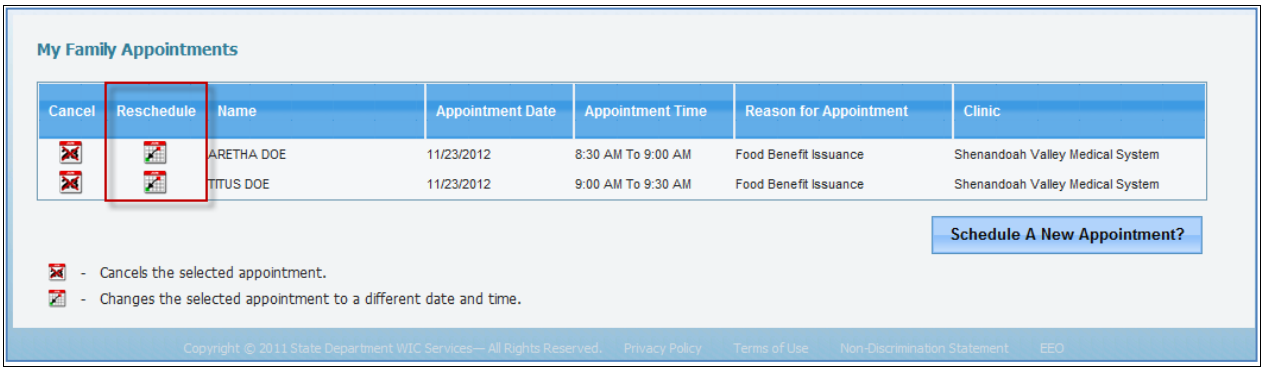


3. Click **Cancel**. The cancelled appointment no longer displays on the **My Family Appointments** grid.

Task K. Rescheduling Family Appointments

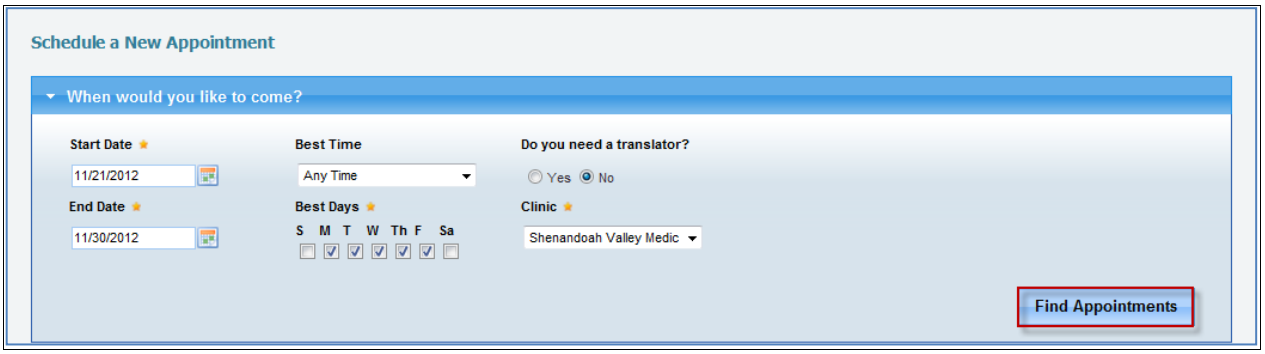
The **Family Appointments** screen allows the registered user to reschedule an appointment for the family.



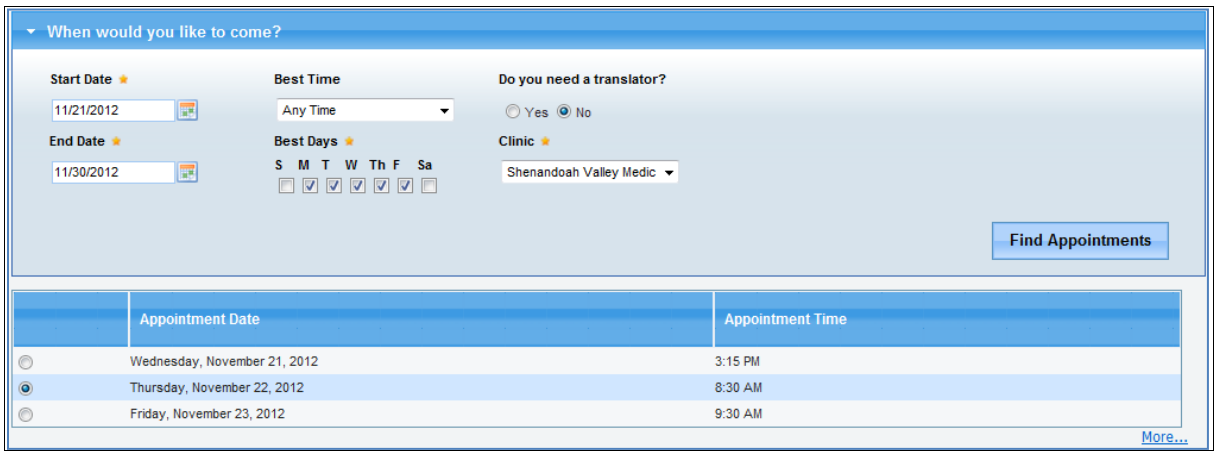


Complete the following steps to perform this task:

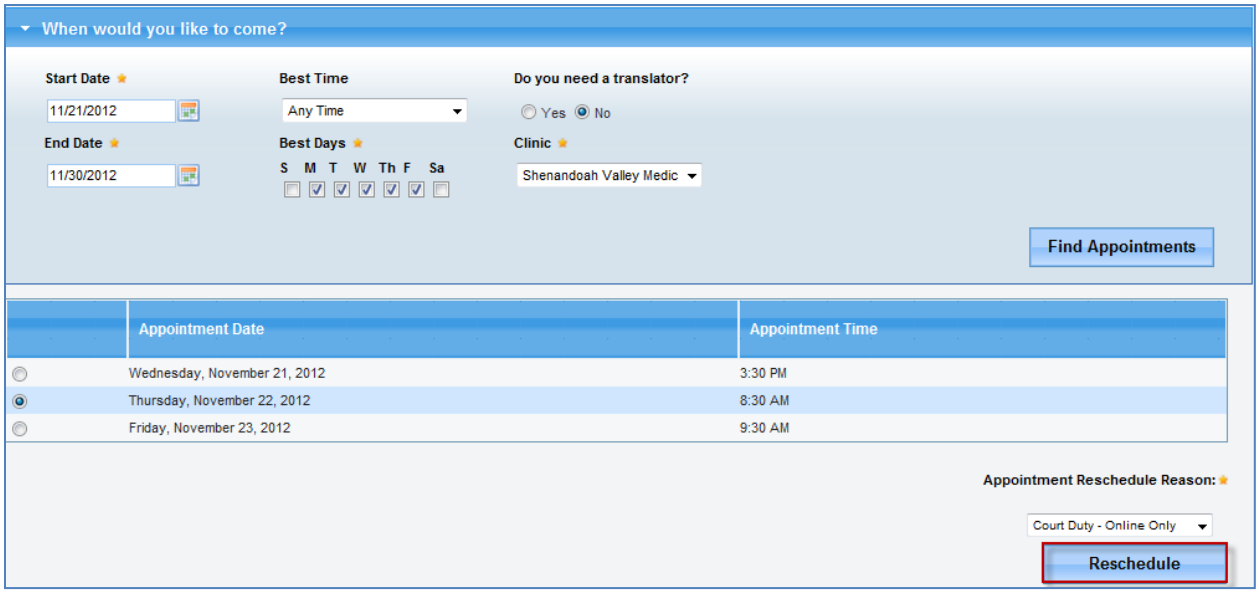
1. Click **Reschedule**. The **Schedule a New Appointment** screen displays.



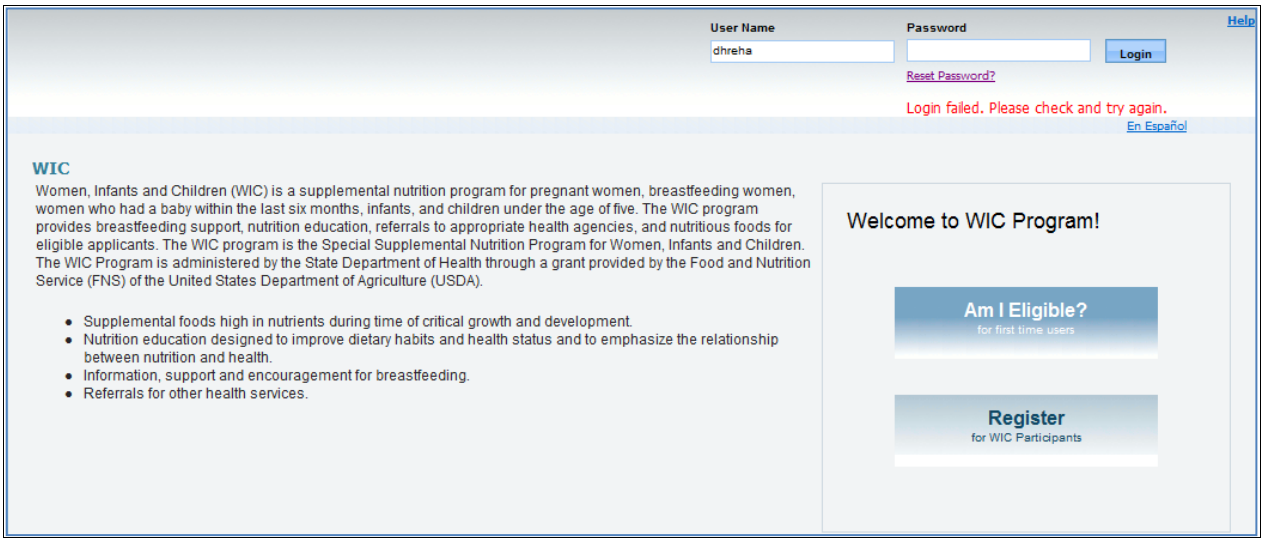
2. Click **Find Appointments**. The available **Appointment Date and Appointment Time** grid displays.

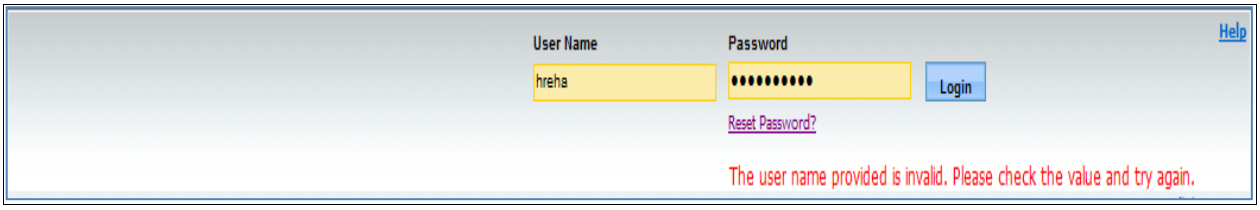


3. Click a radio button to select an available appointment on the list.



Task L. Resetting a Password





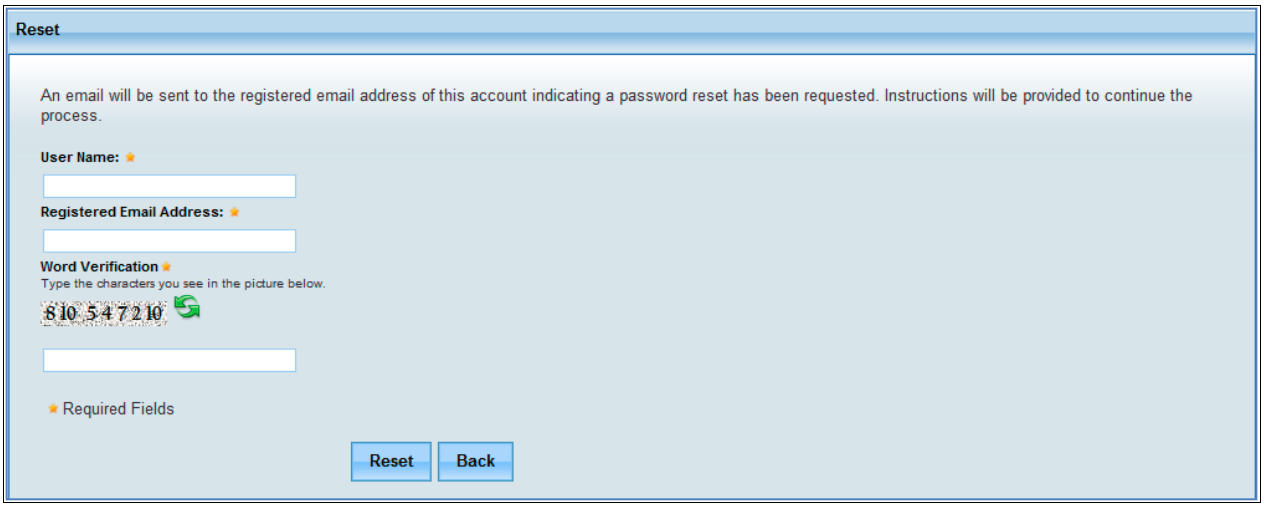
Once an applicant or an existing WIC family has registered to access the Participant Portal, the individual uses their User Name and Password to re-enter the Participant Portal. If the Password is forgotten and the field left blank, the system will display a message; Login failed. Please check and try again. If, after several attempts, an individual cannot access the system, the user must reset the password.

If the entered Password is incorrect, Invalid password will display.

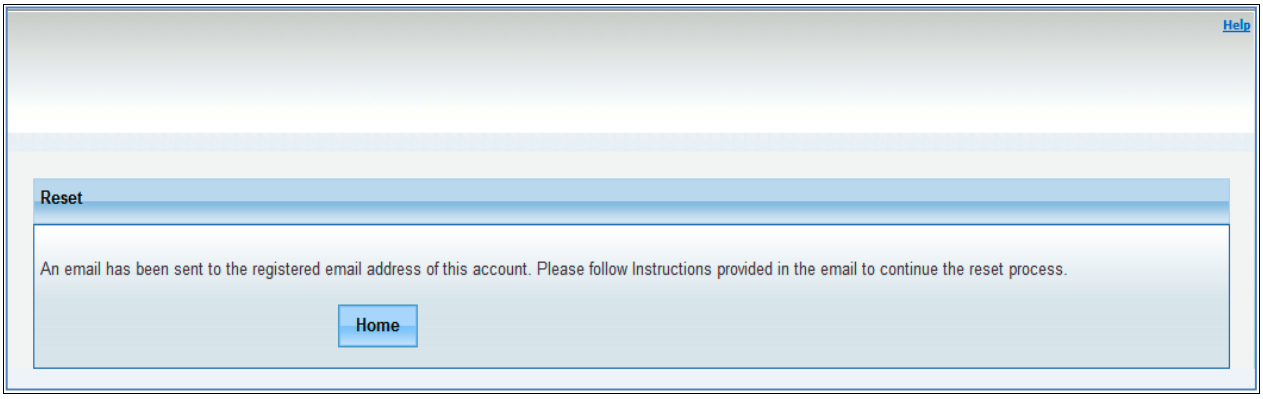
If the entered User name is incorrect, The user name provided is invalid. Please check the value and try again.

Complete the following steps to perform this task:

1. Click the **Reset Password** link. The **Reset** screen displays.
2. Enter the following information:
   - **User Name**
   - **Registered Email Address**
   - **Word Verification**



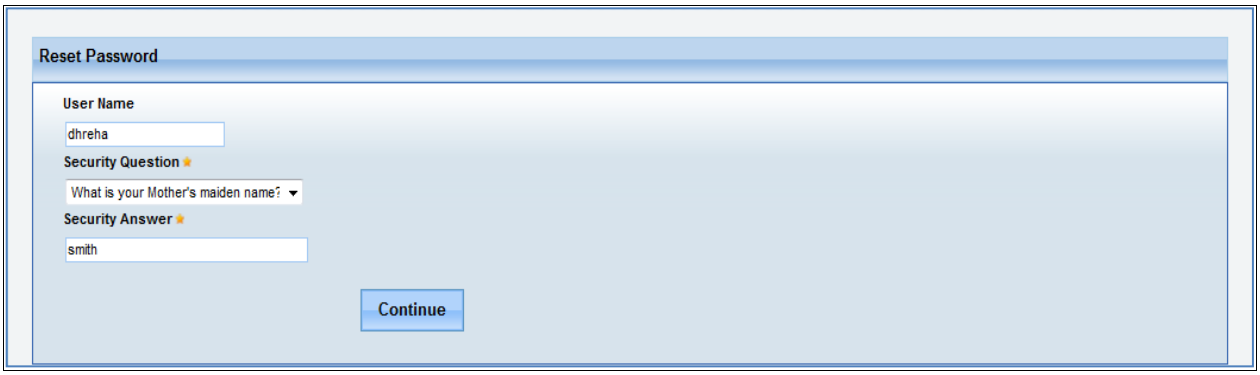
3. Click **Reset**. The screen refreshes and an additional **Reset** screen displays stating that an e-mail has been sent to the registered e-mail address of the user's account. If the e-mail address used to retrieve new passwords or notifications is inactive, the user will need to contact the clinic to update their e-mail address enabling the user to retrieve the new password notifications.



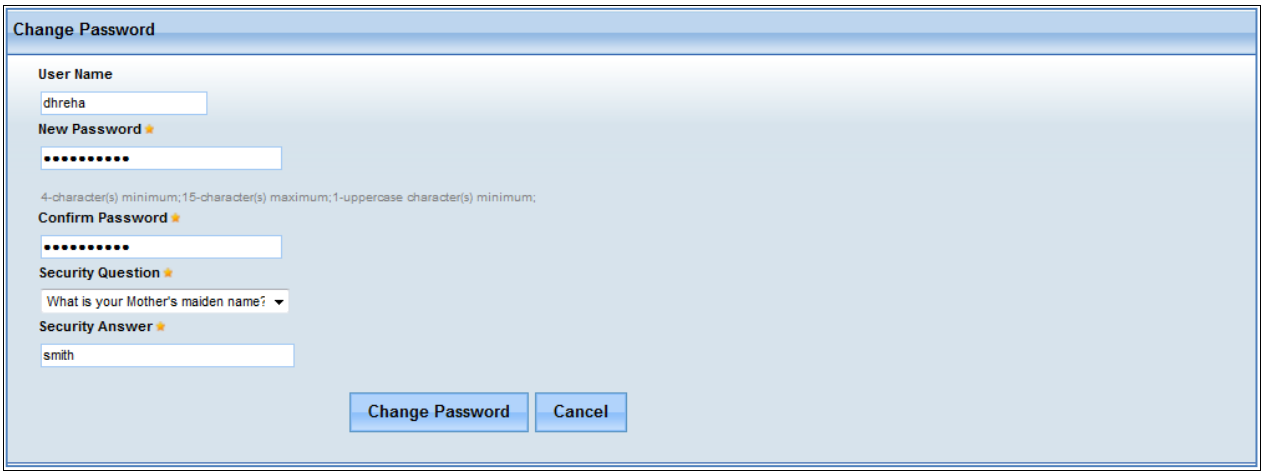
4. Click **Home**. The WIC home page displays.

> Once the Home screen displays, go to your email account. Click on the link in your email message, which takes you to the Reset Password screen.

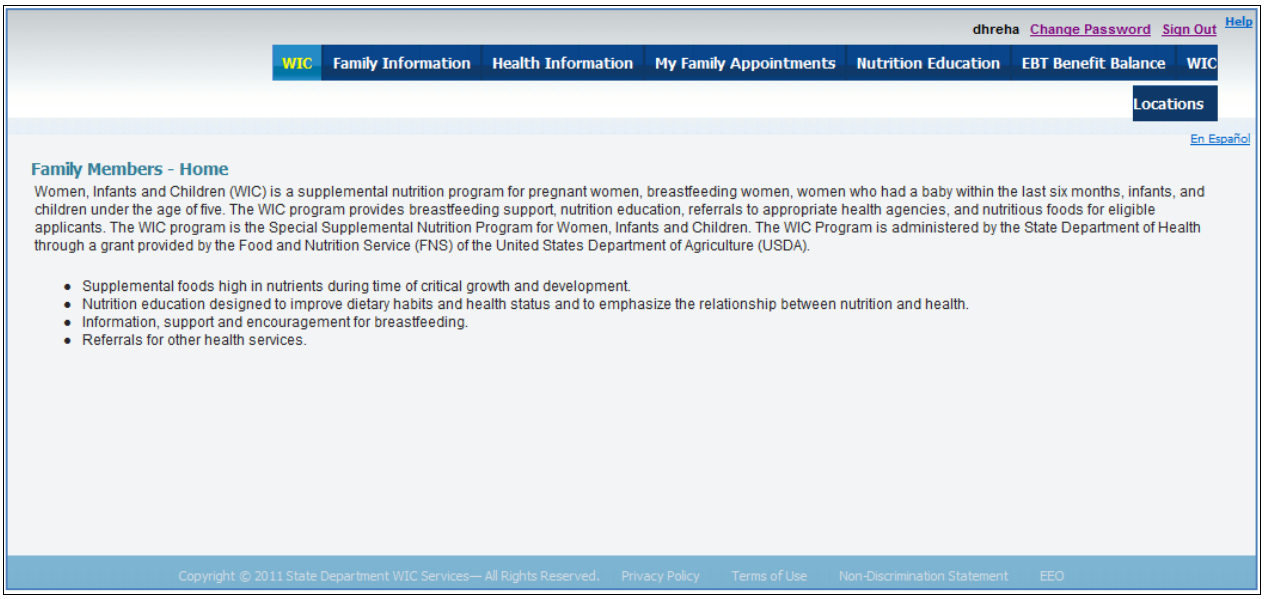
5. Enter the following:
   - Enter **User Name**.
   - Select **Security Question**.
   - Enter the **Security Answer**.
6. Click **Continue.** The **Change Password** screen displays.

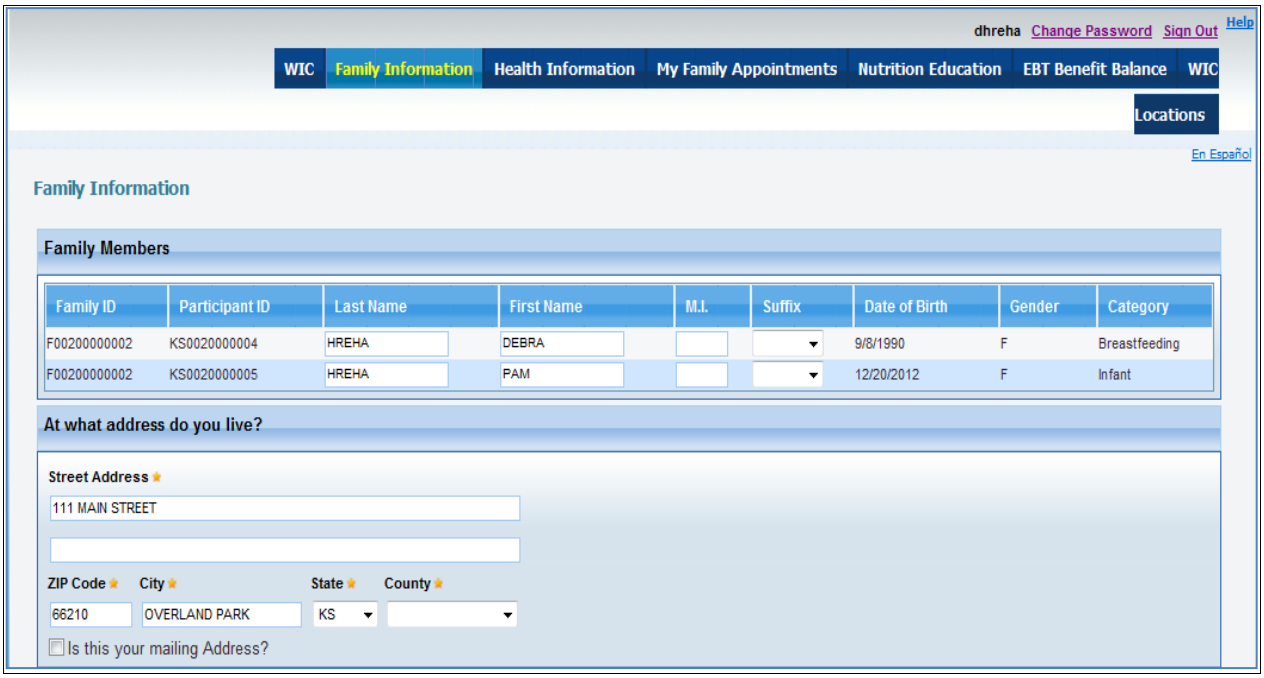


7. Enter the following:
   - Enter **New Password**.
   - Enter **Confirm Password**.
   - Select the **Security Question** from the drop-down list box.
   - Enter the **Security Answer**.

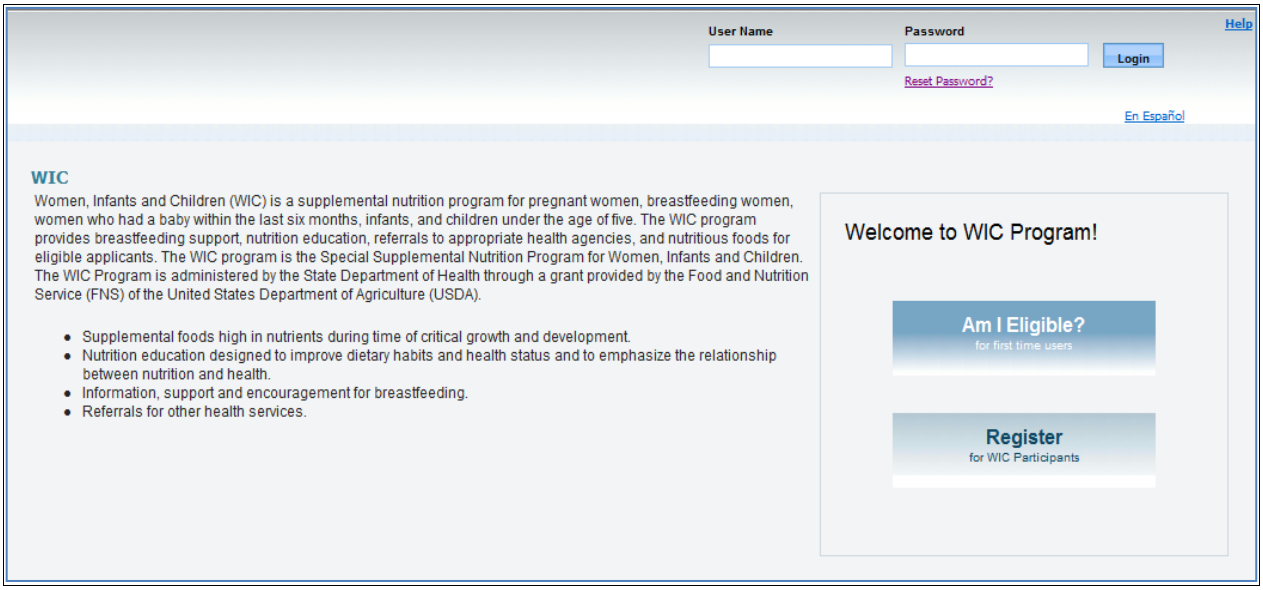


8. Click **Change Password**. The **Family Members – Home** screen displays automatically logging you into the portal.





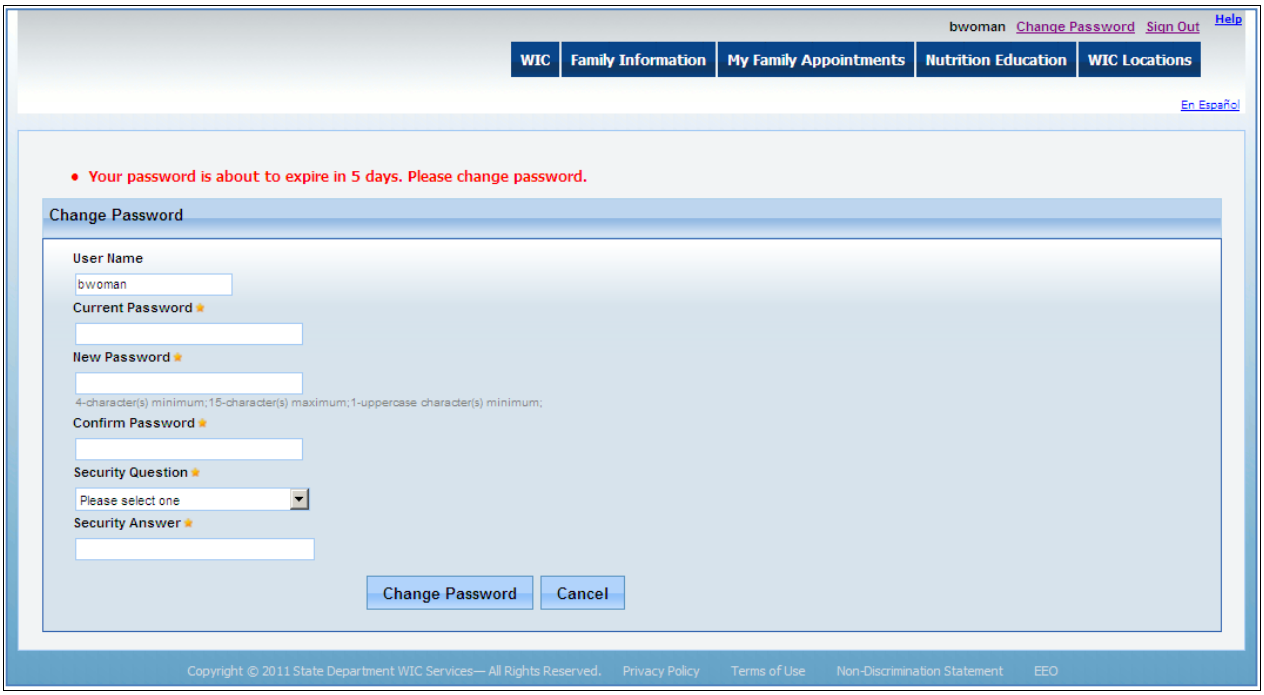
9. Click **Home**. The screen refreshes and the initial **WIC Login** screen displays.



The **Expiration Notice** screen displays when the user password is expired or is due to expire.

10. Complete the **Change Password** screen by enter the following information:

- **User name**
- **Current Password**
- **New Password**
- **Confirm Password**
- **Security Question**
- **Security Answer**



11. Click **Change Password**. The system saves the password change.

After successfully logging in, an active/registered participant in the WIC program has access to modify family information, schedule a family appointment, select a nutrition education class and choose a WIC clinic location.

Congratulations!

You have successfully completed the **Verifying Potential Eligibility** process.