# Participant Database Report

The Crossroads Clinic module report titled **Participant Database Plus Assessment Questions** includes a list of every participant in the Local Agency database in Crossroads from 1/1/2021 through the day the report is run. This report can be used for multiple purposes, including but not limited to: Community Assessment, Business Continuity scenarios, Outreach, and Evaluation of Demographics.

Because this report contains Personal Health Information (PHI), take great care when saving and sharing this report. Follow security best practices such as saving only to the most secure areas on your computer network, using encryption, and deleting reports after use. Always ensure that data is only accessible to authorized users.

To run the report, navigate to the **Family Services** menu, select **Reporting** and then **Generate Reports**. Select **Participant Database Plus Assessment Questions** from the list of reports. A new browser window will open. Select a **Report Type** (Clinic or Local Agency) and your **Local Agency/Clinic(s)** and then **View Report**. For ease of viewing, sorting and filtering the entire report, select the **Excel icon** to download the report.

The report contains basic demographic information for each participant as well as:

- WIC Category
- Status
- Certification Start Date and End Date
- Language Read and Language Spoken
- Last Modified Date (the last time the field **Where did you hear about WIC?** was changed)
- Where did you hear about WIC
- Does anyone smoke or vape around you and/or your child in enclosed areas
- Has adequate household food storage and preparation
- Has household food insecurity
- What is your source of drinking water
- How often during the week is the family together for the evening meal
- What are your biggest obstacles coming to WIC
- Would you refer a friend to WIC
- Family Issuance Date
- Last Issuance
- Expiration Date

This report contains Telephone Numbers but does not determine whether families have opted in to Teletask. For a report with this information, generate the **Active Contacts** report and refer to the resource **Uploading Recipients to Teletask**.

After downloading, the report is not filtered or sorted but it can be filtered/sorted in many ways. Ideas for sorting include but are not limited to:

- By zip code (for geographic mapping)
- By birthday (for children: birthday cards or other outreach)

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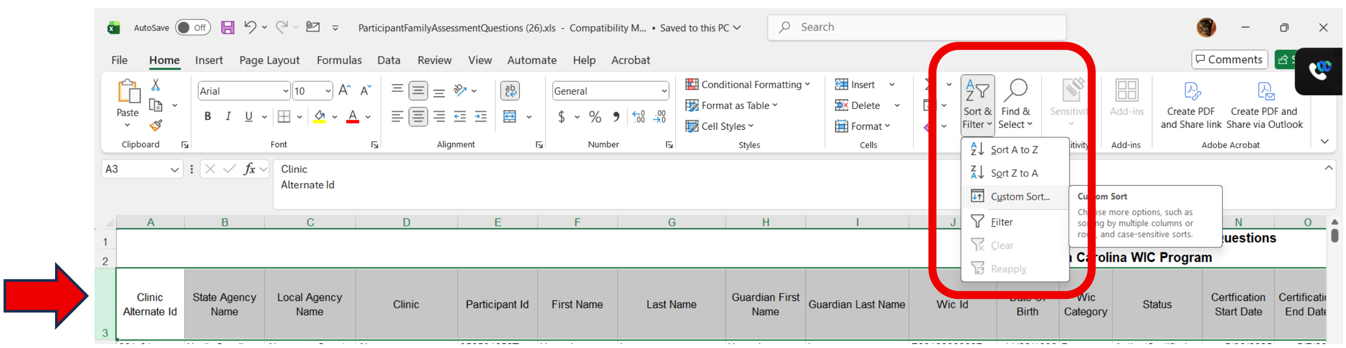
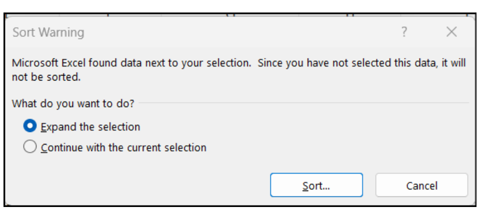
- By Category (to find inactive but previously certified infants/children)
- By Category (to find all pregnant or all breastfeeding women)
- By Language Read/Language Spoken (to identify participant groups with special needs)
- By Family Issuance Day and then Last Issuance/Last Use Date (for issuance due)
- By Certification End Date (to identify participants overdue for subsequent certification)
- By Family ID to view all family members

## How to filter this report to show Issuance Due

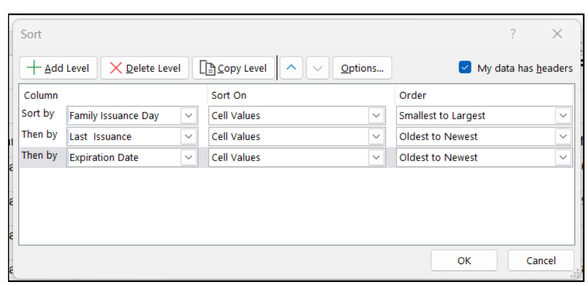
1. Run the report, download as an Excel file, and save it to a secure location on your computer such as a share drive. Suggestion: rename the file with the clinic name and date of the report, such as: *JonesParticipantDatabase8.21.25.xls*.
   Highlight the Column Header row (row 3) then select Sort & Filter > Filter
2. Under **Status** (Column M), uncheck the **(Select All)** box then check **Active/Certified**.
3. Select **Sort & Filter > Custom Sort**.




4. You will get a Sort Warning. Keep **Expand the selection** checked and select **Sort**.




5. Check the **My data has headers** box.
6. Use the **Add level** icon to add two additional levels.
7. Fill out the Custom Sort box using:
   - Family Issuance Day
   - Last Issuance
   - Expiration Date
8. Select **OK**.




The report will sort by Family Issuance Day and then by Expiration Date (Last Day to Spend). This shows who is next due for issuance.

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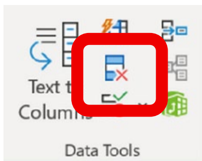
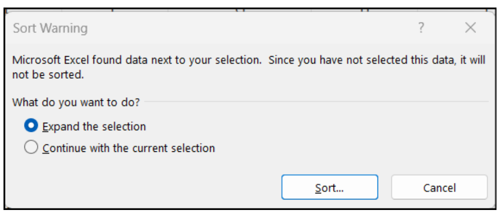
## How to remove duplicate family members from reports

Unduplicate this report by Family ID if you need a list of families, not participants. **Note:** When you use the **Remove Duplicates** feature, the duplicate data is permanently deleted. Before you delete the duplicates, it's a good idea to move or copy the original data to another worksheet so you don't accidentally lose any information.

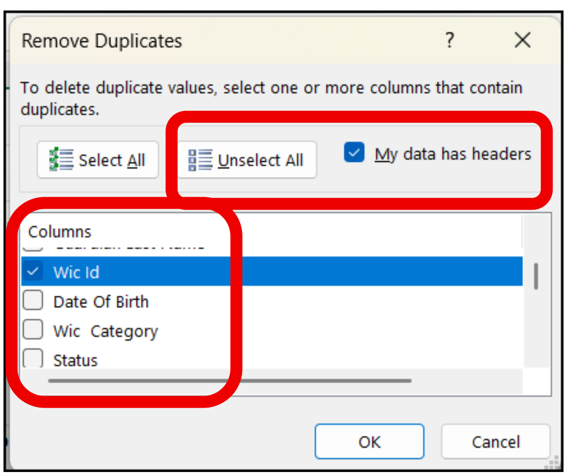
1. Highlight (select) the Column Header row (row 3) then select **Sort & Filter > Filter**
2. Select **Data** > **Remove Duplicates**.



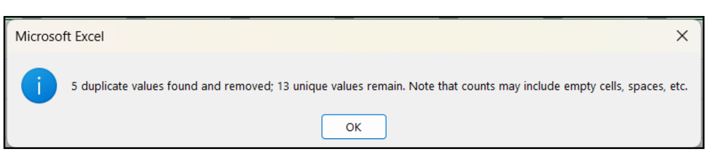

3. You will get a Sort Warning. Keep **Expand the selection** checked and select **Remove Duplicates**.




4. In the **Remove Duplicates** dialog box, check **My data has headers**, **Unselect All**, and (under **Columns**) the **WIC id** box. Select **OK**.




5. You will get a status message (example below). Select **OK**.



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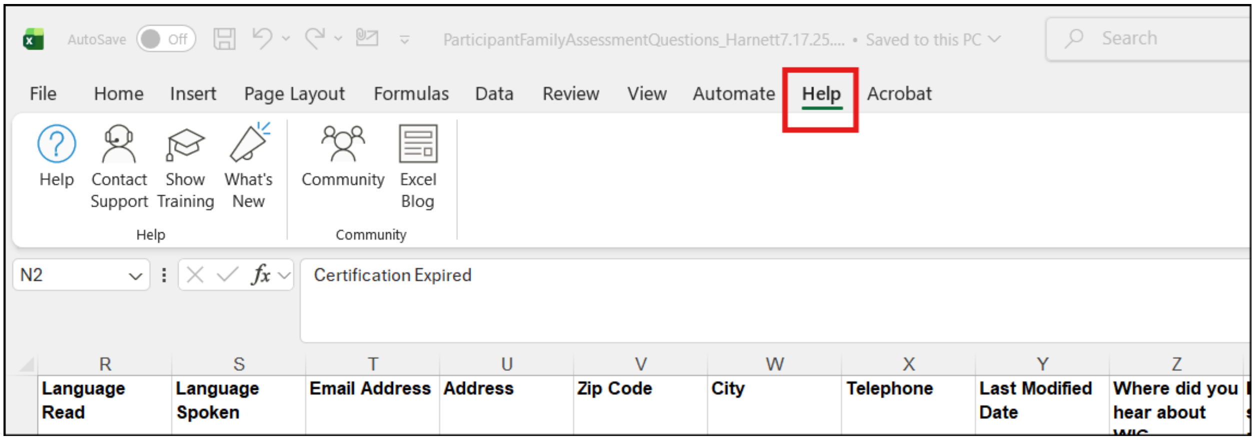
## Notes about this functionality

If you have questions about Excel –use the Excel Help feature, ask your local IT Team or find a work friend with Excel experience!




For questions about Crossroads procedures, please contact the CNSS Customer Service Desk at 919.707.5795, or via email at [CNS.CustomerService@dhhs.nc.gov](mailto:CNS.CustomerService@dhhs.nc.gov). If you have questions regarding any policy aspect of this document, please contact your Regional Nutrition Consultant.