# Road Map for a Complete Certification (includes prescribing food, issuing benefits and scheduling)
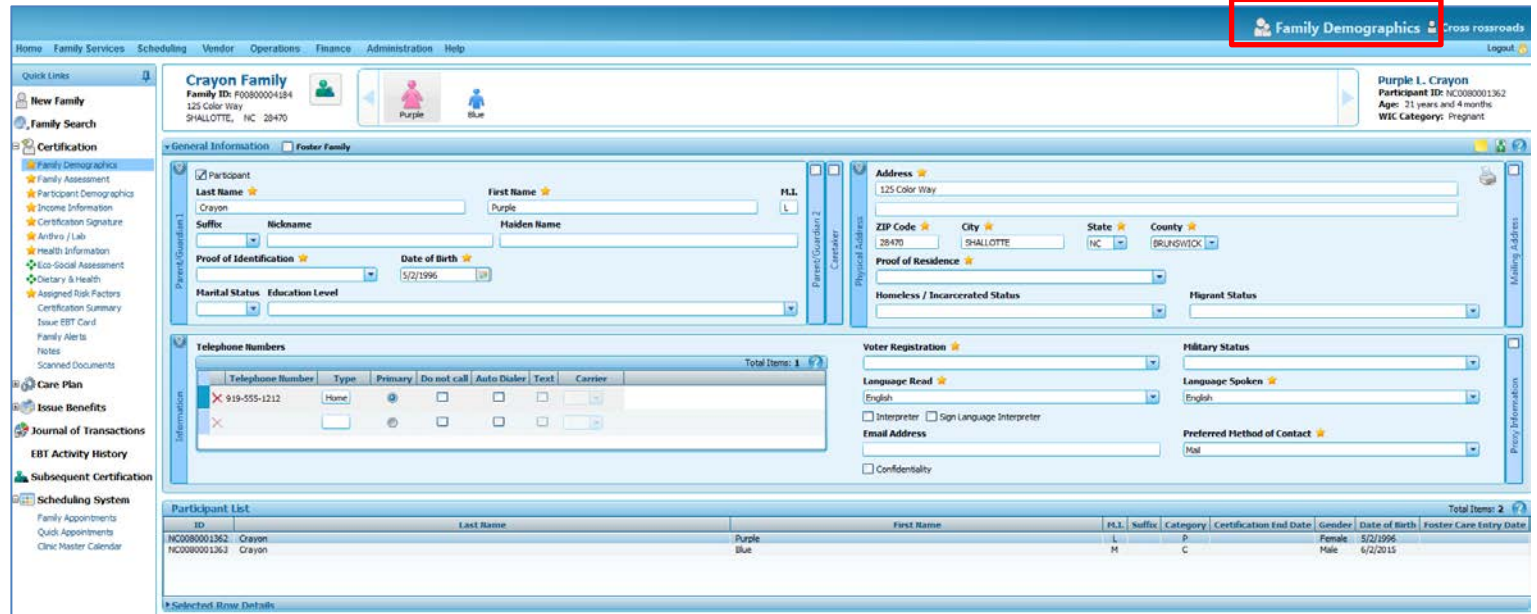
Certifications require that a number of system screens be completed by different WIC staff including Support Staff, MOAs, BFPCs and CPAs. Some screens need to be completed once for the entire family, while other screens need to be completed individually for each member of the family. This resource goes screen by screen to indicate the fields that need to be completed and the staff role most likely to complete each screen. Required fields in Crossroads are designated by a yellow star (⭐); additional fields may be required by North Carolina policy.

1. The **New Family** screen will most likely be completed by support staff.

2. In addition to the fields marked with the ⭐, it is recommended that you include the middle initial for participants and the telephone numbers.
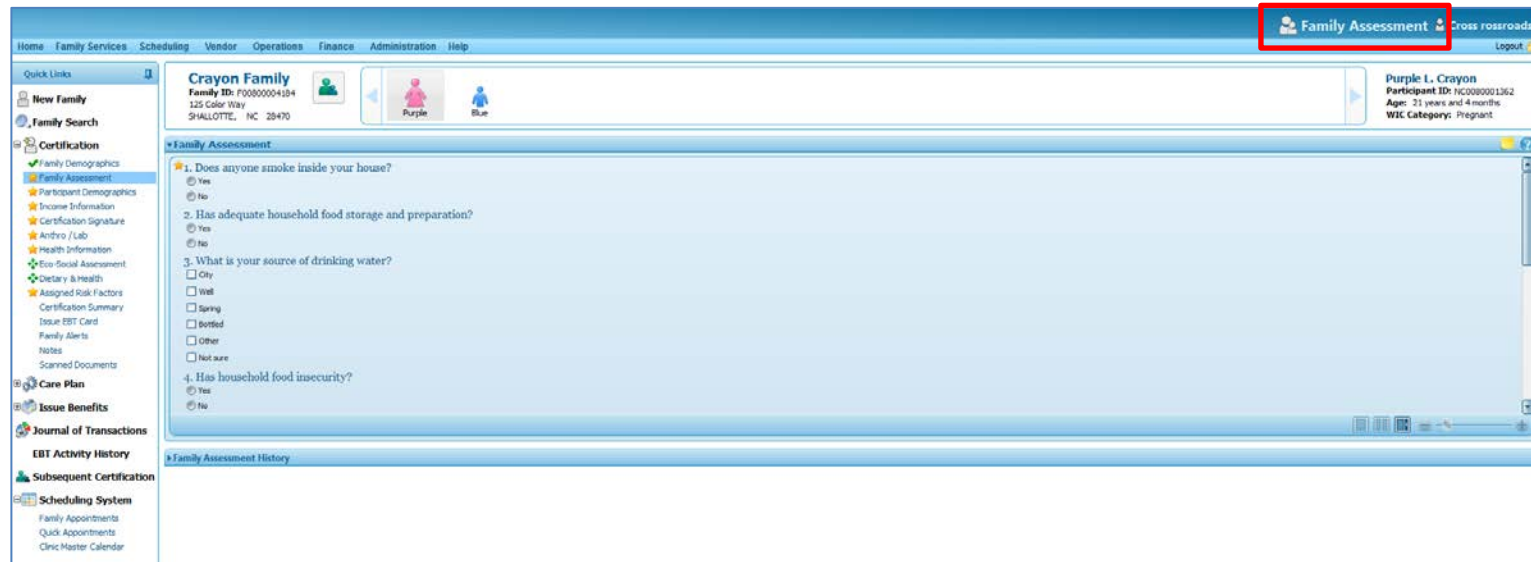
3. The **Family Demographics** screen will most likely be completed by support staff.



4. The **Family Assessment** screen will most likely be completed by support staff.

5. All questions are required by NC Policy.

Note: Refer to the **Family Assessment Question** Resource for clarification on the questions.

6. The **Participant Demographics** screen will most likely be completed by support staff.

7. In addition to the fields marked with the ⭐, select **Declared** or **Observed** under **Race/Ethnicity**.

8. Complete **Link From CNDS** for each participant in the family.

9. The **Income Information** screen will most likely be completed by support staff.

10. Enter the **Family Size** and **No. of Expected Infants** if the participant is pregnant.

11. In addition to the fields marked with the ⭐, enter a **Self-Declared Income Range** if the participant (family) is adjunctively eligible.

12. The **Certification Signature** screen will most likely be completed by support staff.

13. Click **Capture Signature** so the participant may sign using the electronic signature pad.
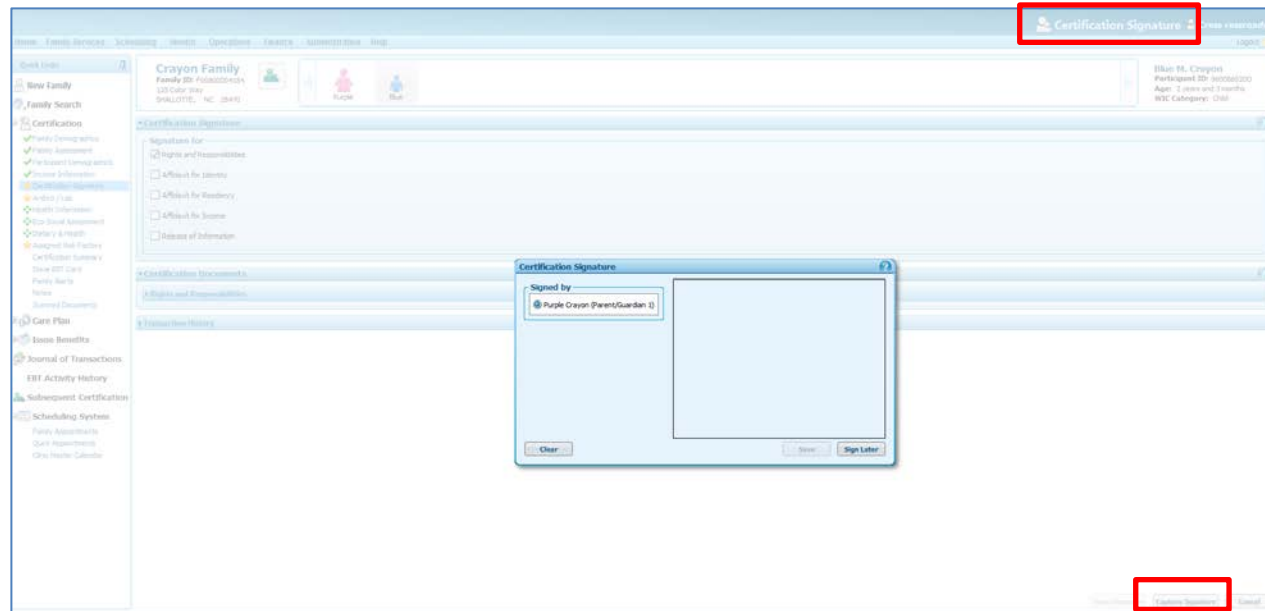


14. The **Anthro/Lab** screen will most likely be completed by the medical office assistant (MOA).
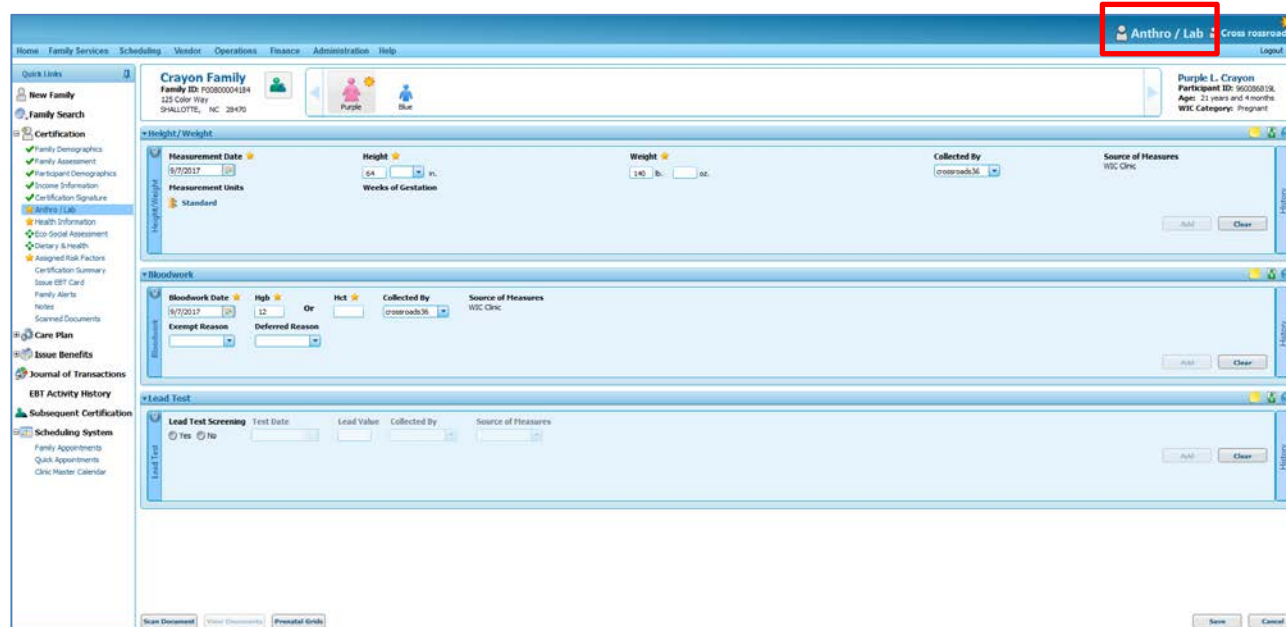
15. The **Health Information** screen will be completed by the CPA.

16. North Carolina policy requires all data fields be completed. This includes updating **Immunizations Status** for infants and children.

17. The **Eco-Social Assessment** screen will be completed by the CPA.
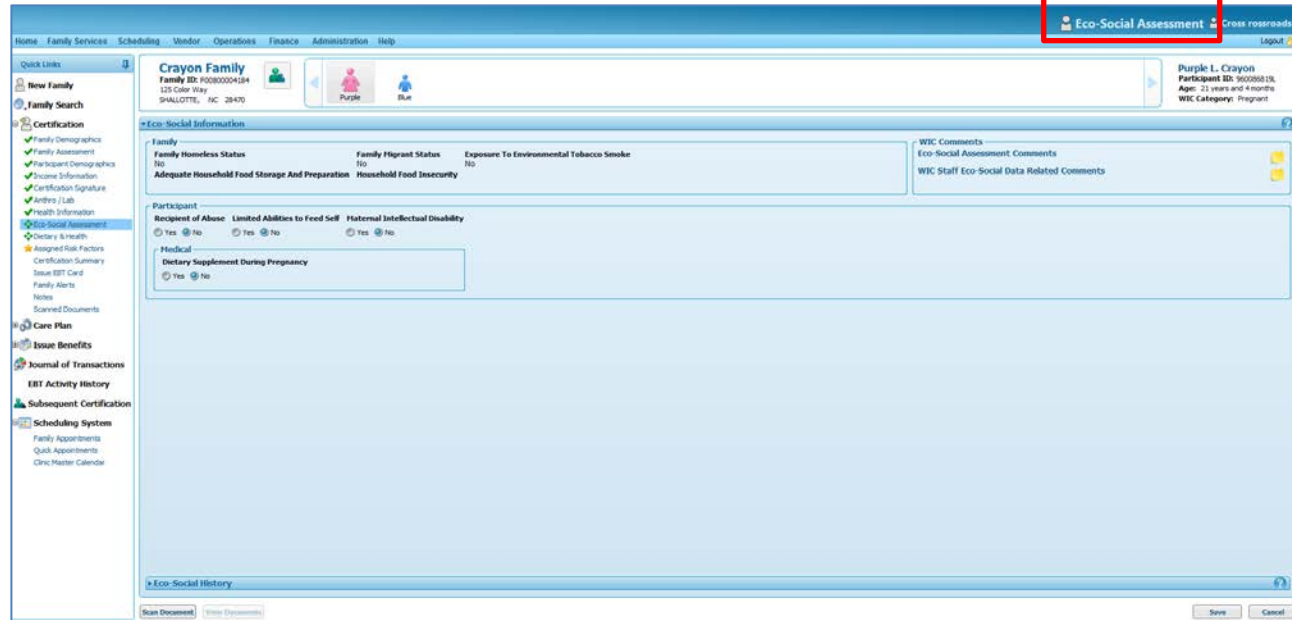


18. The **Dietary & Health** screen will be completed by the CPA.
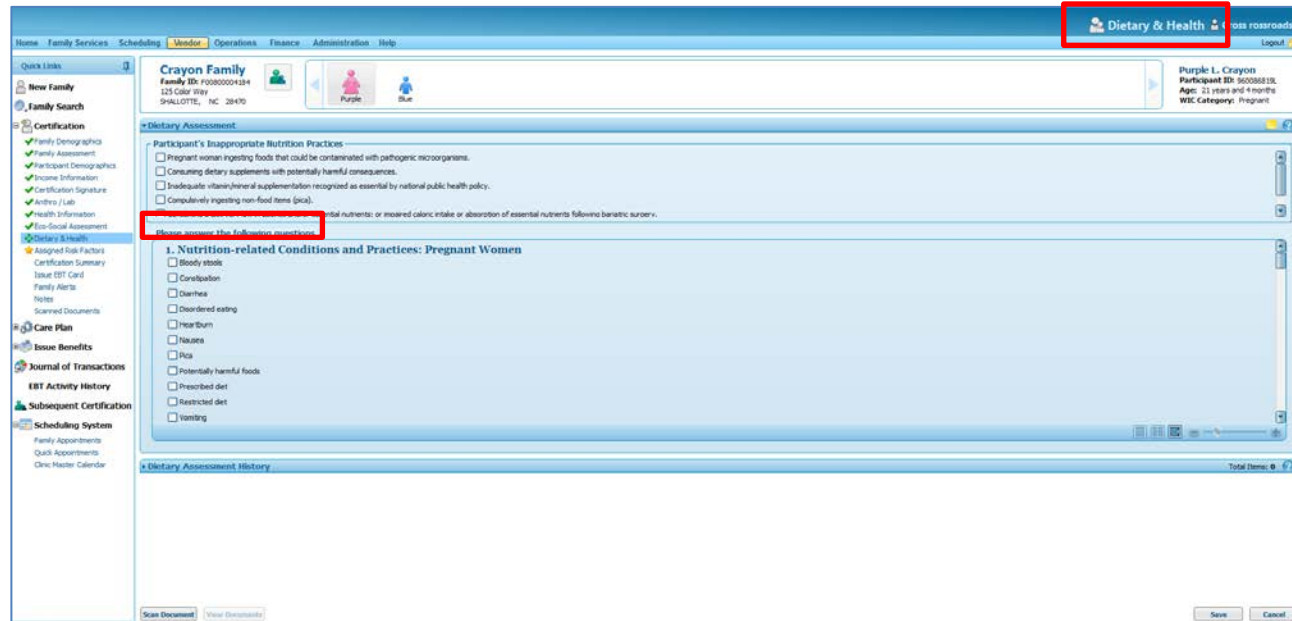
19. North Carolina policy recommends all questions be addressed.

20. The **Assigned Risk Factors** screen will be completed by the CPA.
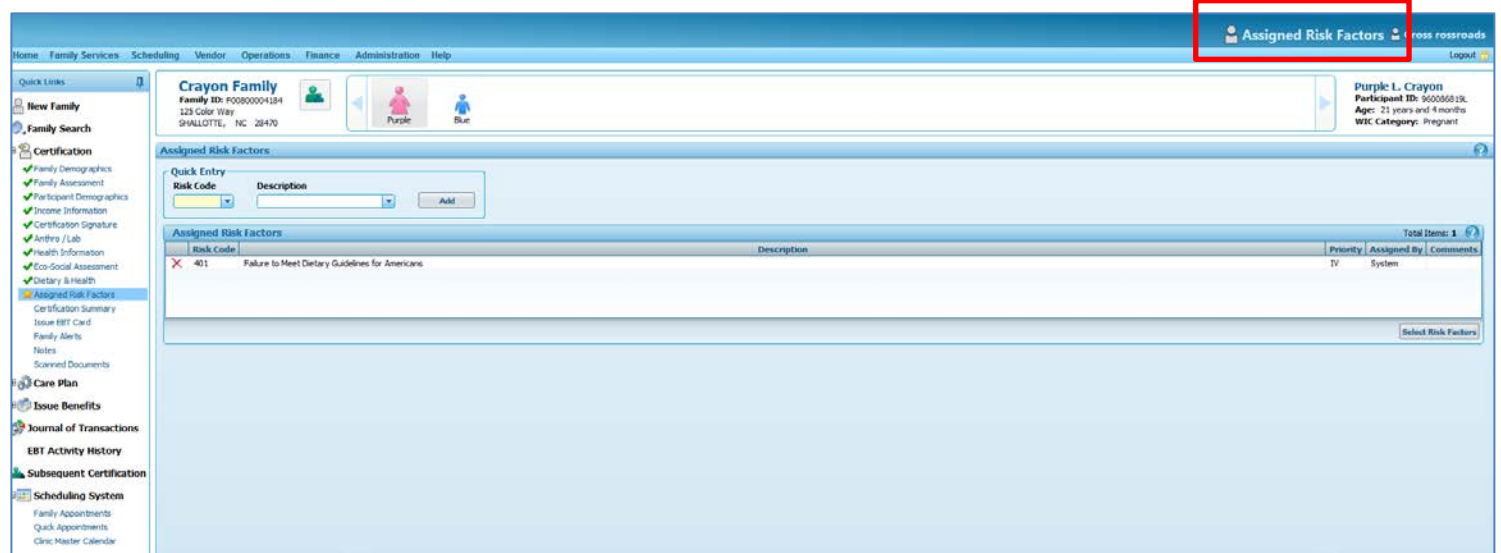


21. The **Care Plan** screens will be completed by the CPA.

22. The entire **Care Plan** is required for Certification. The sections include:
    a. Goals
    b. Nutrition Education
    c. Referrals
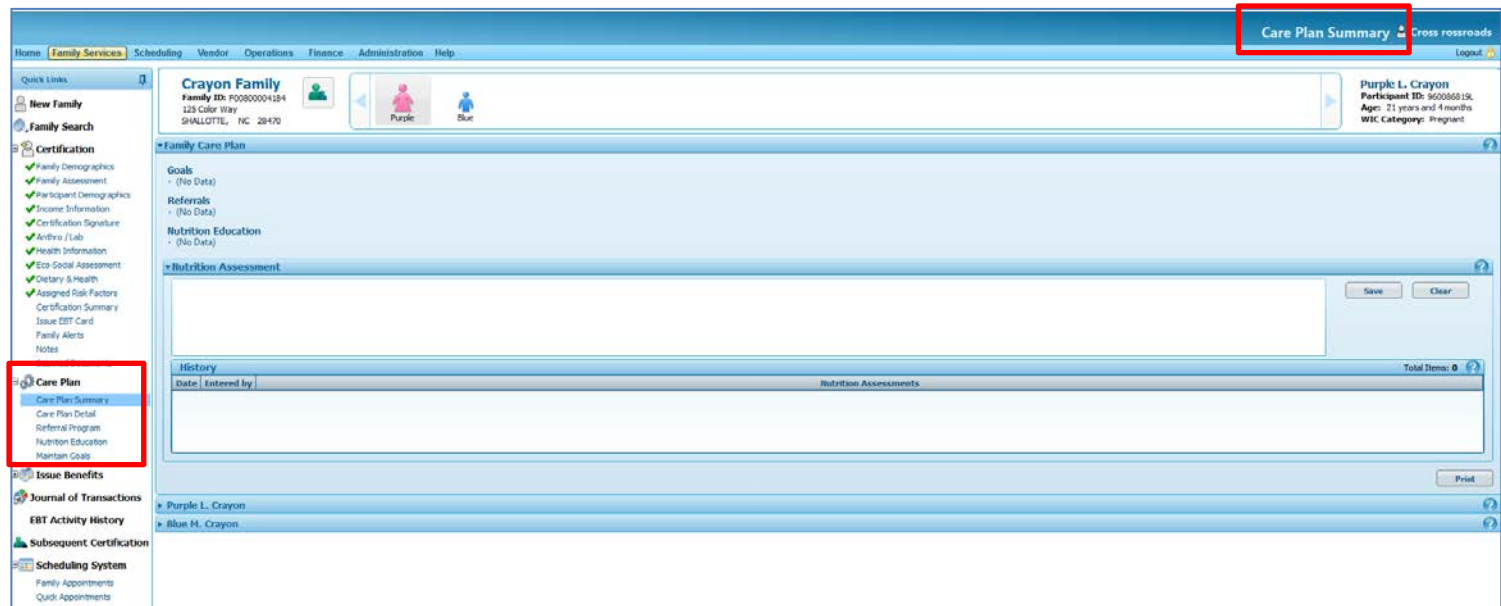
23. The **Maintain Goals** screen will be completed by the CPA.



24. The **Nutrition Education** screen will be completed by the CPA.

25. The **Referral** screen will be completed by the CPA.
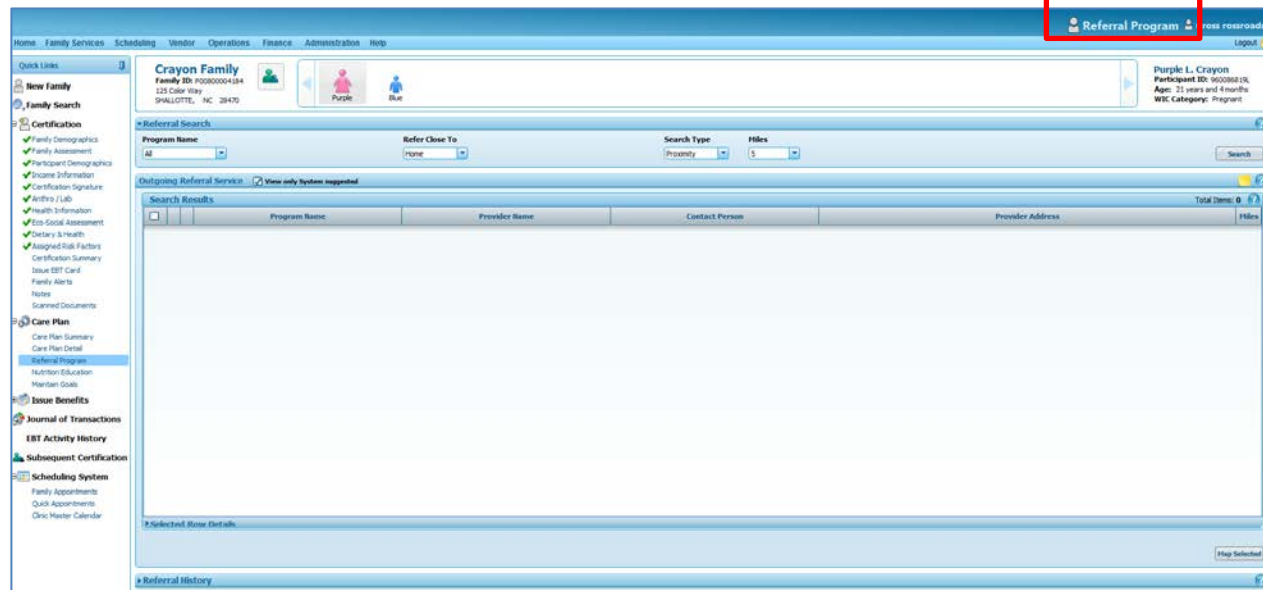


26. The **Certification Summary** screen will be reviewed by the CPA.
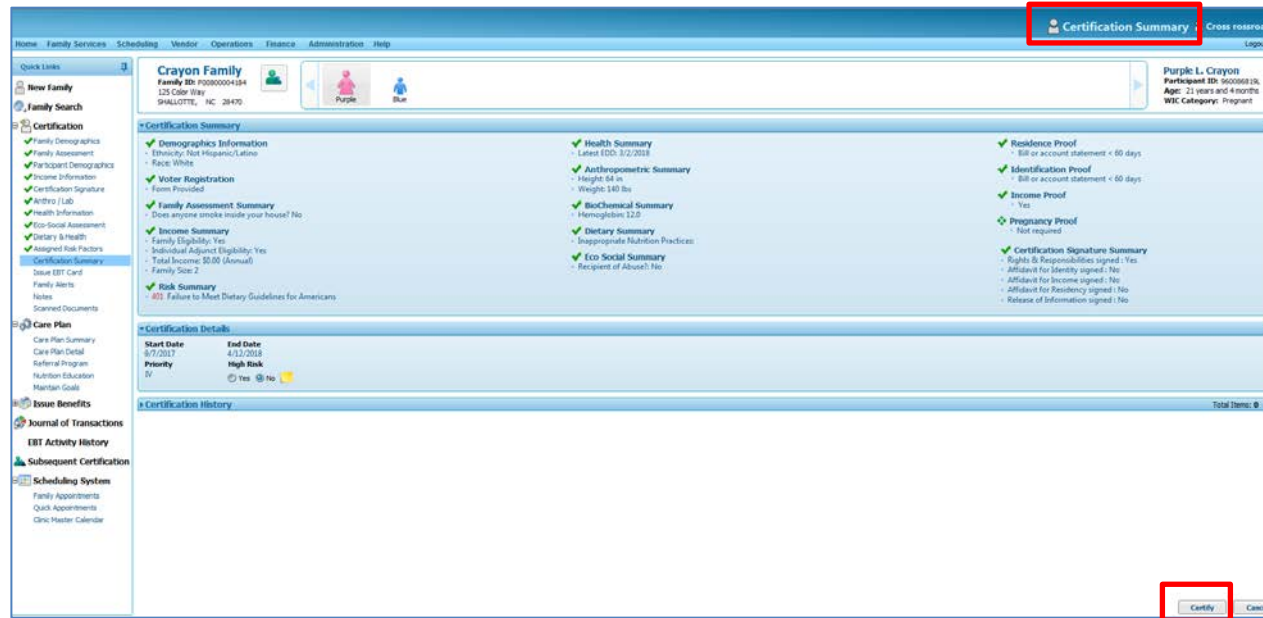
27. The **Certification Summary** screen provides an overview of the certification process. A green check mark (✔) indicates completion and a red x indicates incompletion. When all required sections are completed, the CPA will click the Certify button.

28. The **Prescribe Food** screen will be completed by the CPA for each participant in the family.

**Note:** Please refer to the **Modifying Food Packages** resource for additional information.

29. The **Issue EBT Card** screen will most likely be completed by support staff.

**Note:** Please refer to the **Food Benefits Issuance** resource for additional information.

30. The **Issue Food Instruments** screen will most likely be completed by support staff.

**Note:** Please refer to the **Food Benefits Issuance** resource for additional information.

31. The **Quick Appointments** screen will most likely be completed by support staff.

**Note:** Please refer to the **Scheduling** resource for additional information.