When a participant record is opened in Crossroads, the button is available on the following screens:

- Income Information
- Anthro/Lab
- Health Information
- Eco-Social History

Scan/Upload Document

- Dietary & Health
- Assigned Risk Factors
- Prescribe Food: Medical Documentation

Crossroads has multi-page scanning capabilities. However, this functionality has some issues. North Carolina WIC agencies are instructed to scan and save documents **one page at a time**. Two-sided documents will need to be scanned and saved one page at a time.

Instructions for using the Scan Document function [Example: Anthro/Lab screen]

- 1) Verify that the scanner is turned on.
- 2) Click the Scan/Upload Document button located on the bottom left of the screen.

	-	· · · · ·	
			Add Clear Cost
			1

3) Scan Document Type popup appears on the Anthro/Lab screen: select Contact Type and click OK

Scan Document Type	? 💌
Contact Type	
Anthropometric Contact Bloodwork Contact Lead Test Contact	Cancel

 Scan/Upload Document popup appears. The user can title the document before or after the scan. The Page Source should be kept on Feeder and Duplex Scanning should be <u>OFF</u>.

Scanning Documents in Crossroads

Scan/Upload Document			? ×
Title 🚖			
Comment			
Scanner TW-Brother ADS-2000	Page Source Seeder Tray	Duplex Scanning	Scan Page(s)

- 5) Place the document (one page) in the scanner face down with the top of the page in the slot and click **Scan Page(s)**
- 6) After the document has been scanned, a popup screen opens showing the scanned document and giving options to Rescan Page(s), Preview Document, Save or Cancel.

Scan/Upload Document				(?) 💌	
Title 🚖					
Comment					
Scanner		Page Source	Duplex Scanning		
TW-Brother ADS-2000	-	🔘 Feeder 🕖 Tray	🔵 On 🧕 Off	Scan Page(s)	
PDF file name.					
		Click to select PDF fi	le.		
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	C -	T	21		1
	Scanne	r le	74		
				~	1
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Rescan Page(s) Preview Document				Save Cancel	

Scanning Documents in Crossroads

If Rescan Page(s) is selected, the following popup appears:

Scan/Upload Document			
Title 🚖			
Comment			
Scanner	Page Source	Duplex Scanning	
TW-Brother ADS-2000	Seeder Tray	🔘 On 🥥 Off	Scan Page(s)
Do you want to delete all page	ges from the current do	cument and scan agai	n?

If the document needs to be rescanned, place the document in the scanner and Select Yes. Otherwise, Select No and Crossroads will return to the original scan.

7) Title the scanned document if not already done so and click Save.

Scan/Upload Document				•	×
Title 🚖					
Danny Donkey_Blood Work_09.13.22					
Comment					
Scanner		Page Source	Duplex Scanning	,	Ĩ
TW-Brother ADS-2000	-	🔘 Feeder 🛛 🔵 Tray	🔵 On Off	Scan Page(s)	
PDF file name.					
		Click to select PDF f	ile.		
	Scanne	r Te	5+		
Rescan Page(s) Preview Document				Save Cance	,
review Document				Callee	·

8) Scan additional pages using steps #2-7. The same title as the original scan can be used with the addition of page numbers.

Scanning Documents in Crossroads

9) Complete the starred fields on the Anthro/Lab screen and click **Save**. This will save the data on the screen **AND** the scanned documents.

NOTE: Crossroads will NOT save scanned documents on the Anthro/Lab or Dietary & Health screens *if data on the screen is not added or changed*. The user can either change something on the screen or scan from another screen, such as Health Information or Eco-Social History.

10) After the document has been scanned and saved, the user can view it on the Anthro/Lab screen [in this example] by clicking on the **View Documents** button located on the lower left of the screen next to the **Scan/Upload Document** button.

Scan/Upload Document	View Documents	Growth Grids

or by selecting the Scanned Documents quick link under Certification

To view the document under **Scanned Documents**, click on the magnifying glass located on the right-hand side under the title **View**.

Quick Links Image: Control of the second secon	Donkey Family Family ID: F0060004703 471 Farm Lane BOLIVIA, NC 28422	Leidre C	Danny		Danny T. Donkey Participant ID: NC0060002165 Age: 4 months WIC Category: Infant
Anthro / Lab Health Information	Scanned Documents		1		Total Items: 2 🕜
Eco-Social Assessment Dietary & Health		Title	Scanned By	Document Type	Date View
Assigned Risk Factors Certification Summary	Blood Test Result 09.09.22		crossroads36	Height/Weight Document Bloodwork Document	9/9/2022
Issue EBT Card Family Alerta Notes Scanned Documents	Danny Donkey_Blood Work_09.13.22		crossroads36	Bloodwork Document	9/13/2022
		Scan	ner Test		
Documen	it List				Total Items: 1 🕐
	Title	Date Time Scanned	Scanned By	Comment	
Danny	Donkey_Blood Work_09.13.22	9/13/2022 12:40:10 PM	crossroads36		Export to PDF

IMPORTANT: If scanning on a screen that doesn't have starred fields, be sure to click **Save** before leaving that screen. Otherwise, the scanned document will not be saved. There is no prompt to save the screen.