Crossroads can now determine if a gap in benefits will result from transferring an infant or child between families. A hard stop message will occur when **ALL** of the following conditions are met:

- The Family Issuance Day (FID) of the Current (sending) Family is earlier in the calendar month than the FID of the Receiving Family **AND**
- The date of transfer is earlier in the calendar month than the FID of the Receiving Family AND
- The Current Family does not have issued benefits for the current month AND
- The Receiving Family has issued benefits for the current month.

## Example: In State Transfer (Individual to Family)

Current Family (Iceland) FID=5 Receiving Family (Basketball) FID=18 Date of Transfer= 1

Current Family: does not have issued benefits for the current month Receiving Family: has issued benefits for the current month

Iceland Family Family ID: F04900006485 541 Cold Way RURAL HALL, NC 27045				Particip Age: 2	h Iceland pant ID: 954465686N years and 6 months itegory: Child
Issue Food Instruments					<u> </u>
Configuration					
Family Issuance Day Issuance Frequency 3 Month(s)					
Family Issuance Members					Total Items: 1 🕐
Category Participant	Certification End Date	Aug	Sep	Oct	
Child Joseph Iceland	8/30/2017	1/3	Full	Full	Change Rx
[L					
Basketball Family Family ID: F04900006479 125 National Way RURAL HALL, NC 27045	<b>⊘</b>			Age: 26 years	<b>(etball</b> D: 954465634L s and 6 months y: Breastfeeding Woman
Issue Food Instruments					0

• Fan 18	nily Issuance	Day Jssuance Frequency 3 Month(s)					
amily	Issuance N	1embers					Total Items: 3
	Category	Participant	Certification End Date	Aug	Sep	Oct	
	Breastfeeding	Betty Basketball	6/1/2017	Issued	Issued	Issued	Change Rx
2	Infant	Nathan Basketball	6/1/2017	Issued	Issued	Issued	Change Rx
	Infant	Nancy Basketball	6/1/2017		Issued	Issued	Change Rx

After clicking the **Transfer** button on the **Transfer Between Families** screen, a pop-up message (below) is shown. The user must click **OK** to clear the message. Crossroads will not allow the transfer to occur until the individual being transferred is issued current month benefits in the current family.

Family	Members Not Fully Issued
	Transfer cannot be completed!
•	The individual(s) selected for transfer do not have current benefits issued. Prior to the transfer, benefits must be issued in the current family for the current month. Contact the appropriate staff to issue current benefits in the current family and then complete the transfer.
	ок

# Before the transfer can take place, complete the following steps to issue to the transferring individual for the current month:

Transferring within the **same clinic**:

- If the current (sending) family has multiple family members on WIC, de-aggregate the benefits and change the Issuance Frequency to 1 Month. Issue 1 month to the individual being transferred. Do not issue future months in the current family. Do not issue to the additional family members who are not being transferred. Note: If the individual being transferred is a foster child, de-aggregation is not necessary.
- Give the printed FIs for the current month to the Receiving family.
- Complete the transfer (see instructions on page 3)

#### Transferring to a **different agency**:

- Contact the clinic of the sending family and have them issue current month FIs for the individual being transferred. Give them the following instructions:
  - If the current (sending) family has multiple family members on WIC, de-aggregate the benefits and change the Issuance Frequency to 1 Month. Issue 1 month to the individual being transferred. Do not issue future months in the current family. Do not issue to the additional family members who are not being transferred. Note: If the individual being transferred is a foster child, de-aggregation is not necessary.
  - Void those printed FIs after the transfer has taken place.
- After the sending clinic has completed issuance for the current month, complete the transfer (see instructions on page 3). Then issue MFIs for the current month with FDTS equal to the date of transfer and LDTS equal to the last day of the sending family's issuance month. Prorate MFIs if necessary. Document the MFI issuance and reason in the participant's Care Plan.

A New Family	Iceland Family Family ID: F04900006485 541 Cold Way RURAL HALL, NC 27045		Joseph				Age: 26 y	and ht ID: 954465690L ears and 6 months gory: Pregnant
Certification	Issue Food Instruments							(?
Family Demographics Family Assessment Participant Demographics Income Information Health Information Anthro / Lab	Configuration Family Issuance Day Family Issuance Members	Issuance Frequence 1 Month(s)	Ŷ					Total Items: 2
Anthro / Lab Eco-Social Assessment	Category	Participant		Certification End Date	Aug	Sep	0ct	
Dietary & Health Assigned Risk Factors	Pregnant I a Iceland		5/13/201	,	Not Selected	Not Selected	Not Selected	Change Rx
Certification Signature Certification Summary Identification Document Family Alerts Notes	Child Diseph Icela	nd	8/30/201	7	1/3	Not Selected	Not Selected	Change Rx
Scanned Documents								
Susue Benefits Prescribe Food Issue Food Instruments Issue FM Food Instrument List Exchange/Increase Fomula Sourcease fomula Superiorations								
Subsequent Certification								
	FDTS: 9/1/2016 - LDTS: 9	9/4/2016						Total Items: 7 🕐
				Su	ibcategory		Qui	
Family Appointments		Food Category						antity UOM
Family Appointments Quick Appointments	Mik Low Fat/fat free	Food Entregory		Skim or 1% Milk			2	Gallons
Family Appointments	Mik Low Fat/fat free Fruit & Vegetables Cash Value Eggs Juice 64 Bread/Whole Grains	Tood Editogory		Skim or 1% Milk Fruit and Vegetables - Cash Value Vouche Grade "A" Large White Eggs Juice 64 oz. Whole Wheat Bread or Whole Grains	r		2 \$8. 1 1 32	Gallons 00 \$\$\$ Dozen Containers Ounces
Quick Appointments	Mik Low Fat/fat free Fruit & Vegetables Cash Value Eggs Juice 64 Bread/Whole Grains Cereal (Adult) Legumes			Skim or 1% Milk Fruit and Vegetables - Cash Value Vouche Grade "A" Large White Eggs Juice 64 oz.			2 \$8. 1 1	Gallons 00 \$\$\$ Dozen Containers
Family Appointments Quick Appointments	Mik Low Fat/fat free Fruit & Vegetables Cash Value Eggs Juice 64 Bread/Whole Grains Cereal (Adult)	for i delegary		Skim or 1% Mik Fruit and Vegetables - Cash Value Vouche Grade "A" Large White Eggs Juice 64 oz. Whole Wheat Bread or Whole Grains Breakfast Cereal			2 \$8. 1 1 32 18	Gallons 00 \$\$\$ Dozen Containers Ounces Ounces

In the above example, current month benefits will be issued to the individual being transferred with FDTS 9/1/16 (date of transfer) and LDTS 9/4/16 (last day of the sending family's issuance month).

**Do not issue** <u>future</u> months in the current (sending) family. If the issuance frequency is not changed and the individual is issued future months in the current family, then the following message will appear during the transfer: 'Future Benefits exist for Transferring Participant.'

Future Benefits exist for Transferring Participant (Paper)
One or more future benefits are currently issued for the individual selected for transfer. The participant's current family must return to have their future month's benefits voided and reissued. Note that selecting Transfer will proceed with the transfer process regardless of future benefit issuance. Future benefits will remain in an issued status and will not be available for reissunace in the new family.
Transfer Cancel

If the **Cancel** button is selected, the user is returned to the **Transfer Between Families** screen. The user can then void the future months' benefits from the Sending Family using the FI List or the FI Investigation Tool. After future months' benefits are voided, return to the **Transfer Between Families** screen and select **Transfer**.

If the **Transfer** button is selected, the user proceeds to the **In State Individual to Family Transfer Confirmation** screen. This popup serves as a notification and warning and does **not** perform any activity on future issuances. It does **not** affect the functionality of issuing benefits to cover a gap period, but is only an information message to the user to alert them that future benefits have been issued in the sending family.

## Completing the transfer: In State Individual to Family Transfer Confirmation

In some scenarios, Crossroads will determine that an **additional gap in benefits** will result from transferring a participant between families. Additional food benefits will be displayed in the **In State Individual to Family Transfer Confirmation** as shown below. Crossroads calculates the number of days in the gap period and prorates the food benefits. The proration is based on the time period between the FID of the Sending Family and the FID of the Receiving Family. The benefits will have a FDTS equal to the date of the transfer and a LDTS equal to the last day of the issuance period for the Receiving Family. **Note:** If an additional gap in benefits is **not** found, only the Current and Receiving Family Information containers will be shown in the confirmation container.

he following transfer?							
	Individuals being transferre	d			Receiving Family Info	rmation —	
idualsTotal Items: 2 🕜	Benefits to cover Chan	ge in Family Issuance Day 09/01 - 09/17	7 Total It	tems: 7 🕜	Family ID F0490006479		Total Items: 3 🕐
tegory Name	Food Category	Food Subcategory	Quantity	UOM		WIC Category	
nt Ida Iceland Joseph Iceland	Eggs	Grade "A" Large White Eggs	1	Dozen	Parent/Guardian	Breastfeeding Infant	Betty Basketball Nathan Basketball
Joseph Iceland	Cereal (Adult)	Breakfast Cereal	24	Ounces	Betty Basketball	Infant	Nancy Basketball
	Legumes	Dry Beans 1 pound bag OR Peanut Butter 16-18 oz	1	Containers		Turque	Inditcy basketudii
	Bread/Whole Grains	Whole Wheat Bread or Whole Grains	32	Ounces	Address		
	Fruit & Vegetables Cash Value	Fruit and Vegetables - Cash Value Voucher	\$8.00	\$\$\$	125 National Way		
	Juice 64	Juice 64 oz.	1	Containers	RURAL HALL, NC, 27045		
	Milk Low Fat/fat free	Skim or 1% Milk	3	Gallons			

## Example (Iceland→Basketball families):

Current Family FID=5

Receiving Family FID=18

18-5 = 13 days of food benefits

Note that the benefits have a FDTS equal to the date of the transfer (9/1) and a LDTS equal to the last day of the issuance period for the Receiving Family (9/17) but only 13 days of food are issued because of the benefits issued **before** the transfer (to cover 9/1 - 9/4).

## Completing the transfer: In State Individual to Family Transfer Confirmation (continued)

Click the **OK** button to complete the transfer and issuance of benefits to cover change in Family Issuance Day. When additional benefits are issued as part of the transfer, the system will prompt for a signature. Have the receiving family sign for these FIs. **Do not** void these printed FIs. Give them to the receiving family.

After the signature has been obtained and the Save button has been clicked, the transfer will take place and a Successful status message received.

At this point, the transferred individual has the following issued FIs:

- FDTS 9/1/16 LDTS 9/4/16 (current month with sending family)
- FDTS 9/1/16 LDTS 9/17/16 (benefits to cover gap in issuance)

FI dates may overlap. This is acceptable. Do not void any of these printed FIs.

After the transfer has taken place, open the record of the receiving family and go to the **Issue Food Instruments** screen. Verify if any *future month* FIs need to be printed for the transferred individual.

	ing Vendor Op	erations Finance Adn	ninistration Help							Logo
ck Links 🎵 ew Family amily Search	Basketball Family ID: F04900 125 National Way RURAL HALL, NC	006479	Betty Nathan	(A) Nanc	◎ 👗			Betty Bas Participant Age: 26 yea WIC Catego	ID: 954465 rs and 6 mc	onths
Certification Is	ssue Food Instrum	onts								
Family Demographics	Suc roou motium	Gifts								
Eamly Accessment	Configuration									
Income Information	Family Issuance 18	Day // Issuance 3 Month(s)	requency							
Health Information	Family Issuance	Members							Total	Items: 4
co-Social Assessment	☑ Category	Part	icipant		Certification End Date	Aug	Sep	Oct		
Dietary & Health Assigned Risk Factors		g Betty Basketball		6/1/2017		Issued	Issued	Issued		hange Rx
Certification Signature Certification Summary	Infant	Nathan Basketball		6/1/2017		Issued	Issued	Issued		hange Rx
dentification Document amily Alerts	☑ Infant	Nancy Basketball		6/1/2017		Issued	Issued	Issued		hange Rx
Notes Scanned Documents	Child	Joseph Iceland		8/30/2017		Issued	Ful	Ful		hange Rx
Care Plan										
Issue Benefits										
Issue Benefits										
Prescribe Food										(
Prescribe Food Issue Food Instruments	▼FDTS: 9/18/201	16 - LDTS: 10/17/2016								
Prescribe Food ssue Food Instruments ssue FM Food Instruments		Food Catego	vry			ategory			Quantity	UOM
Prescribe Food ssue Food Instruments ssue FM Food Instruments Food Instrument List	FDTS: 9/18/201 Mik Low Fat/fat free Fruit & Vegetables Ca	Food Catego	iry		ikim or 1% Milk	ategory				
Prescribe Food ssue Food Instruments ssue FM Food Instruments food Instrument List Exchange/Increase Formula	Mik Low Fat/fat free Fruit & Vegetables Ca Eggs	Food Catego	iry	F	ikim or 1% Milk Fruit and Vegetables - Cash Value Voucher Grade "A" Large White Eggs	ategory			Quantity 4 \$8.00 1	UOM Gallons \$\$\$ Dozen
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In the example above, future (September and October) food benefits are available to be issued to the transferred individual. The food benefits available to be issued for September have a FDTS 9/18/16 and a LDTS 10/17/16 to match the FID of the receiving family. Select **Issue** to issue September and October food benefits.

**Note:** The issuance of benefits to cover a gap in coverage caused by a transfer is only available as part of the transfer process. These benefits will not be shown as 'available' for issuance through the Issue Food Instruments screen.