

Update Data Items Resource for Local Agencies

The Community Nutrition Services Section (CNSS) **Customer Service Desk (CSD)** can now perform the following updates in Crossroads:

- **Delete Pregnancy History**
- **Remove Participation to allow Issuance**
- **Update Applicant Category**
- **Update Date of Birth of Individual**
- **Update Estimated Delivery Date**
- **Update Gender (Infant and Child)**

This resource provides information on each type of update and its associated features. It reviews rules for each update, explains changes that occur in Crossroads and provides important steps for local agencies to follow, when applicable.

Delete Pregnancy History

Feature: Updates Pregnancy History information even after certification.

Rule: Pregnancy History cannot be tied to a current or past certification record.

When **Delete Pregnancy History** occurs using this new functionality, the following actions will take place in Crossroads:

- 1) Pregnancy History will be deleted for the specified date.
- 2) An entry will be created in the **Journal of Transactions** to indicate that the Pregnancy History Record was deleted.
- 3) A **Family Alert** will be created with Alert Description: Pregnancy History deleted

IMPORTANT: A CPA will need to enter the correct Pregnancy History once the incorrect one has been deleted. Also, a CPA should review the Risk Codes for possible modified risks. Crossroads will NOT update Assigned Risk Factors based on the deleted Pregnancy History.

Example of Journal of Transactions and Family Alerts

Journal of Transactions:

Select Participant or Family	Select Activity	Start Date	End Date		
All	Update Data Items	3/27/2022	4/27/2022	Search	

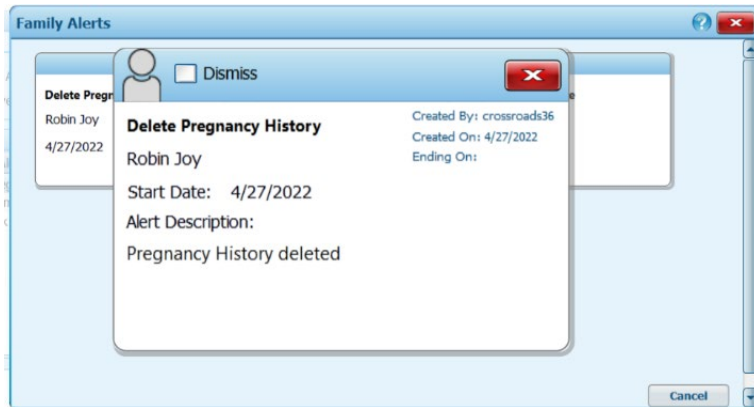
Transaction History					Total Items: 2
Occurrence Date	Activity Description	Participant Name	Staff Name Modified	Staff Name Created	
4/27/2022	Pregnancy Outcome Deleted	Robin Joy	Cross roadsroads	Cross roadsroads	
4/27/2022	Pregnancy History Deleted	Robin Joy	Cross roadsroads	Cross roadsroads	

Participant Name	Activity Description	Value Before Change	Value After Change	Staff Name Modified	Date Updated
Robin Joy	Pregnancy History Deleted	474030	DELETED	Cross roadsroads	4/27/2022 4:17 PM

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Family Alerts:



Remove Participation to Allow Issuance

Background Information: Participation is created for a benefit month when food benefits are issued to a participant. It can also be created to record non-issuance benefits, such as nutrition and breastfeeding education. Even though the issuance dot is blue, food benefits may not have been issued.

Example:

A breastfeeding woman PBF > MMA or PBF Fully Formula Fed has participation recorded for nutrition and breastfeeding education after the infant turns six months old. The woman then returns to the agency to be certified as pregnant with another child. If the participation record exists (issuance dot is blue for the current month), then the mother cannot be issued food benefits for the new pregnancy.

To issue food benefits to the mother, the existing participation needs to be **deleted**.

Feature: Removes participation for a certified postpartum woman not receiving food benefits.

When **Remove Participation to allow Issuance** occurs using this new functionality, the following actions will take place in Crossroads:

- 1) The issuance dot for the month participation was removed will change from blue to green. The participant is now available for issuance for this benefit month.
- 2) An entry will be created in the **Journal of Transactions** to indicate that Participation is deleted for benefit month xxxxxxxx for participant xxxxxxxx.
- 3) A **Family Alert** will be created with Alert Description: Participation deleted

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Example of Journal of Transactions and Family Alerts

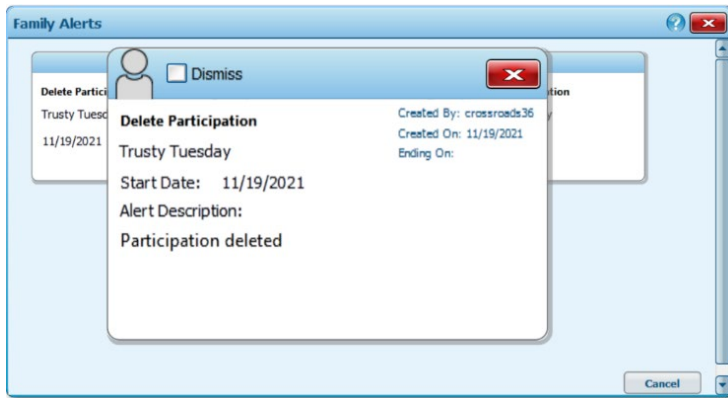
Journal of Transactions:

The screenshot shows a software interface for managing transactions. At the top, there is a 'Transaction Criteria' section with a search bar and filters for 'Select Participant or Family' (set to 'All'), 'Select Activity' (set to 'Update Data Items'), 'Start Date' (1/1/2021), and 'End Date' (4/28/2022). Below this is a 'Transaction History' table with 3 items. The table has columns for Occurrence Date, Activity Description, Participant Name, Staff Name Modified, and Staff Name Created. The data shows three entries for 'Participation Deleted' for 'Trusty Tuesday' on 11/19/2021, all modified by 'Cross rossroads'. Below the table is a detailed view for the first entry, showing 'Participant Name: Trusty Tuesday', 'Activity Description: Participation Deleted', 'Value Before Change: False', 'Value After Change: True', 'Staff Name Modified: Cross rossroads', and 'Date Updated: 11/19/2021 3:04 PM'.

Occurrence Date	Activity Description	Participant Name	Staff Name Modified	Staff Name Created
11/19/2021	Participation Deleted	Trusty Tuesday	Cross rossroads	Cross rossroads
11/19/2021	Participation Deleted	Trusty Tuesday	Cross rossroads	Cross rossroads
11/19/2021	Participation Deleted	Trusty Tuesday	Cross rossroads	Cross rossroads

Participant Name	Activity Description	Value Before Change	Value After Change	Staff Name Modified	Date Updated
Trusty Tuesday	Participation Deleted	False	True	Cross rossroads	11/19/2021 3:04 PM

Family Alerts:



Update Applicant Category

Feature: updates category for a new applicant or subsequently certified applicant who has not yet been certified

Rule: The **category** for a **certified** participant **cannot** be modified or deleted.

When Update Applicant Category occurs using this new functionality, the following actions will take place in Crossroads:

- 1) The applicant category will be changed.
- 2) Applicable Crossroads screens will be updated to reflect the new category.
- 3) An entry will be created in the **Journal of Transactions** to indicate that the applicant category was updated.
- 4) A **Family Alert** will be created with Alert Description: Applicant Category Updated

Update Data Items Resource for Local Agencies

Example of Journal of Transactions and Family Alerts

Journal of Transactions:

Lion Family
Family ID: F00600004690
654 Circus Lane
BOLIVIA, NC 28422

Lisa T. Lion
Participant ID: 9601388040
Age: 20 years and 10 months
WIC Category: Pregnant

Transaction Criteria

Select Participant or Family: All | Select Activity: Update Data Items | Start Date: 4/2/2022 | End Date: 5/2/2022 | Search

Transaction History Total Items: 1

Occurrence Date	Activity Description	Participant Name	Staff Name Modified	Staff Name Created
3/16/2022	Applicant Category Updated	Lisa Lion	Cross rossroads	Cross rossroads

Participant Name | **Activity Description** | **Value Before Change** | **Value After Change** | **Staff Name Modified** | **Date Updated**

Lisa Lion | Applicant Category Updated | N | P | Cross rossroads | 3/16/2022 6:56 PM

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Family Alerts:

Family Alerts

Update Appl
Lisa T. Lion
3/16/2022

Dismiss

Update Applicant Category

Lisa T. Lion

Start Date: 3/16/2022

Alert Description:
Applicant Category updated

Created By: crossroads36
Created On: 3/16/2022
Ending On:

Update Birth Date of Individual

Feature: Updates the Date of Birth field for participants.

When **Update Birth Date of Individual** occurs using this new functionality, the following actions will take place in Crossroads:

- 1) The date of birth will be updated for the selected participant.
- 2) Applicable Crossroads screens will be updated to reflect the updated date of birth. This includes the family demographics screen, the participant demographics screen and the growth chart for infants and children.
- 3) An entry will be created in the **Journal of Transactions** to indicate that the date of birth was updated.
- 4) A **Family Alert** will be created with Alert Description: Date of Birth Updated.

Update Data Items Resource for Local Agencies

IMPORTANT: Additional actions will need to be taken by the local agency.

Risk codes should be reviewed for possible modified risks and food prescriptions should be reviewed for possible changes. In addition, growth charts will be affected by change in date of birth and will be updated based on the new birth date.


CNDS needs to be updated with modified information.

If the updated participant is the eWIC cardholder, send account update to SOAR.

Example of Journal of Transactions and Family Alerts

Journal of Transactions:

Fox Family
Family ID: F00600004669
 521 Ritz Drive
 BOLIVIA, NC 28422



Fantastic

Fantastic Fox
Participant ID: 960138712T
Age: 2 years
WIC Category: Child

Transaction Criteria

Select Participant or Family: All | Select Activity: Update Data Items | Start Date: 4/5/2022 | End Date: 5/5/2022 | Search

Transaction History Total Items: 1

Occurrence Date	Activity Description	Participant Name	Staff Name Modified	Staff Name Created
5/5/2022	Date of Birth Updated	Fantastic Fox	Cross roads	Cross roads

Participant Name	Activity Description	Value Before Change	Value After Change	Staff Name Modified	Date Updated
Fantastic Fox	Date of Birth Updated	2/1/2020	5/1/2020	Cross roads	5/5/2022 11:48 AM

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Family Alerts:

Family Alerts

Dismiss

Update Date of Birth

Fantastic Fox
 5/5/2022

Alert Description:
 Date of Birth updated

Created By: crossroads36
 Created On: 5/5/2022
 Ending On:

Cancel

Update Data Items Resource for Local Agencies

Update Estimated Delivery Date

Feature: Updates Estimated Delivery Date more than 4 weeks from the Original EDD.

When the **Estimated Delivery Date** is updated using this new functionality, the following actions will take place in Crossroads:

- 1) The pregnancy record will be updated with the new Estimated Delivery Date.
- 2) The pregnancy certification end date will be updated based on the new Estimated Delivery Date. The certification end date is computed as the day the infant turns 6 weeks (using the estimated new delivery date).
- 3) The Prenatal Weight Gain Grid will render the entire grid based on the new estimated delivery date.
- 4) An entry will be created in the **Journal of Transactions** to indicate that the Estimated Delivery Date changed from xx/xx/xxxx to xx/xx/xxxx for participant xxxxxxxx.
- 5) A **Family Alert** will be created with Alert Description: Estimated Delivery Date Updated.

IMPORTANT: A CPA should review the Risk Codes for possible modified risks. Crossroads will NOT update Assigned Risk Factors based on the new Expected Delivery Date.

Example of Journal of Transactions and Family Alerts

Journal of Transactions:

The screenshot shows the 'Journal of Transactions' interface. At the top, there is a 'Transaction Criteria' section with dropdown menus for 'Select Participant or Family' (set to 'All') and 'Select Activity' (set to 'Update Data Items'). It also includes 'Start Date' (3/27/2022) and 'End Date' (4/27/2022) fields, along with a 'Search' button. Below this is the 'Transaction History' table, which has a 'Total Items: 1' indicator. The table has columns for Occurrence Date, Activity Description, Participant Name, Staff Name Modified, and Staff Name Created. A single entry is shown for 4/27/2022 with the activity 'Estimated Delivery Date Updated' for participant 'Hannah Harvest', modified by 'Cross roadsroads'. At the bottom, there is a detailed view for the selected transaction, showing 'Participant Name' (Hannah Harvest), 'Activity Description' (Estimated Delivery Date Updated), 'Value Before Change' (8/4/2022), 'Value After Change' (9/4/2022), 'Staff Name Modified' (Cross roadsroads), and 'Date Updated' (4/27/2022 1:04 PM).

Occurrence Date	Activity Description	Participant Name	Staff Name Modified	Staff Name Created
4/27/2022	Estimated Delivery Date Updated	Hannah Harvest	Cross roadsroads	Cross roadsroads

Participant Name	Activity Description	Value Before Change	Value After Change	Staff Name Modified	Date Updated
Hannah Harvest	Estimated Delivery Date Updated	8/4/2022	9/4/2022	Cross roadsroads	4/27/2022 1:04 PM

Family Alerts:

The screenshot shows the 'Family Alerts' interface. A detailed alert is displayed for 'Update Estimated Delivery Date'. The alert includes a 'Dismiss' button and a red 'X' icon. The alert details are: Created By: crossroads36, Created On: 4/27/2022, Ending On: (blank), Participant Name: Hannah Harvest, Start Date: 4/27/2022, and Alert Description: Estimated Delivery Date updated. A 'Cancel' button is visible at the bottom right.

Update Data Items Resource for Local Agencies

Update Gender (Infant and Child)

Feature: Updates the Gender field for infant and child participants.

When **Update Gender (Infant or Child)** occurs using this new functionality, the following actions will take place in Crossroads:

- 1) The gender for the participant will be updated.
- 2) Applicable Crossroads screens will be updated to reflect the correct gender. This includes the family demographics screen, the participant demographics screen and the growth chart for infants and children.
- 3) An entry will be created in the **Journal of Transactions** to indicate that the gender was updated.
- 4) A **Family Alert** will be created with Alert Description: Gender Updated.

IMPORTANT: A CPA should review the Risk Codes for possible modified risks.

Also, CNDS needs to be updated with modified information.

Example of Journal of Transactions and Family Alerts

Journal of Transactions:

Transaction Criteria					
Select Participant or Family	Select Activity	Start Date	End Date	Search	
Madrid Spain	Update Data Items	5/5/2022	5/5/2022		

Transaction History					Total Items: 2
Occurrence Date	Activity Description	Participant Name	Staff Name Modified	Staff Name Created	
11/24/2021	Date of Birth Updated	Madrid Spain	Cross roads	Cross roads	
5/5/2022	Gender Updated	Madrid Spain	Cross roads	Cross roads	

Participant Name	Activity Description	Value Before Change	Value After Change	Staff Name Modified	Date Updated
Madrid Spain	Gender Updated	M	F	Cross roads	5/5/2022 2:30 PM

[Update Data Item Detail](#)

Family Alert:

