

CROSSROADS WIC PROJECT

CASELOAD USER MANUAL



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1- OVERVIEW

This manual will aid WIC staff in learning about the function and use of the Caseload module of the Crossroads WIC System. The Caseload module is a comprehensive solution to help WIC staff manage a variety of tasks such as assigning state and agency/clinic caseloads, reallocating caseloads, managing over-under achieving agencies, and creating wait list and caseload restriction criteria. Major functions of this module include the following:

- ❖ **Assigning Caseload** – Used to assign caseload at the state-wide level or at the agency/clinic level.
- ❖ **Updating Caseload** – Used to update state-wide caseload based on changes in costs or funds of food.
- ❖ **Reallocating Caseload** – Used to reassign agency and clinic caseloads using state-defined formulas.
- ❖ **Managing Over- or Under-Achieving Agencies** – Used to recommend new caseloads based on Year-to-Date performance for an agency.
- ❖ **Manage Eligibility Data** - Used to manage potential eligibility data and compare to actual participation.
- ❖ **Creating Wait List and/or Restriction Criteria** – Used to manage the caseload when a WIC program has reached maximum caseload.

Manual Content

This manual includes the following sections:

- ❖ **Table of Contents (TOC)** – Lists each documented training scenario included in this manual. The TOC is organized to complement the delivery of instructor-led, classroom training. Similar scenarios are grouped together by major system functions. Use the TOC to look up training scenarios first by function and then by scenario title.
- ❖ **Training Manual Overview** – Outlines the content of this manual and explains how this manual can be used. It includes information about the general structure of this manual and tips to help you get the most out of it.
- ❖ **Training Scenarios** – Covers situations that one might encounter in a typical day. Each scenario walks you through an entire process. Scenarios connect the individual tasks necessary to complete a process. The scenarios were written and organized to facilitate an instructor-led training session, but the scenarios can be used as reference guides after your training is complete.

Conventions and Features

This manual follows certain conventions that make it easy for you to use the materials presented and includes the following features that help you identify similar information from one topic to another:

- ❖ Training scenarios are grouped together by major system functions, so that you can locate the desired scenario more easily.
- ❖ Each training scenario begins with an Overview section that includes an explanation of what is covered within the scenario, so you'll know from the start what you'll be learning.
- ❖ Training scenarios are documented using Tasks and Steps. A Task is a major activity in a larger process and indicates a substantial portion of the overall process whereas a Step is one of several user actions within a Task.

- ❖ The manual provides Tasks and Steps for differing levels of detail. You can follow the list of Tasks (less detail) or you can go deeper and follow each Step of the process, click by click and action by action (more detail).
- ❖ Buttons you'll need to click and data you'll need to enter are accented in bold to help them stand out on the page, so that you can identify these items more easily.
- ❖ Pictures of application screens are included within each training scenario to help familiarize you with the screens. Data displayed in the pictures is intended for illustrative purposes only and does not represent live data. During classroom training, use the data supplied by the instructor. Outside of classroom training, enter the appropriate data as necessary to complete the task at hand.

Callout boxes help you find specific types of information quickly. The callout boxes are displayed and defined below.

Notes



The notepad-and-pencil icon displays to the left of paragraphs that provide additional, and usually more detailed, information about the application. Sometimes the notes give you additional information about the screen you're working with, and sometimes the notes inform you where to find additional information elsewhere. Either way, it is well worth your time to watch for these helpful icons.

Using This Manual

This manual can be used as a training manual during instructor-led, classroom training or as a reference guide once training is concluded. Use the table of contents (TOC) to locate a training scenario. Once you've located a specific training scenario, review the Overview section (at a minimum) to find out important details surrounding the scenario such as the starting point, type of data needed, and a summary of the Task(s) to be completed in the overall process. You can follow the associated Steps for more detail as needed.

State-Specific Functionality

The Crossroads WIC System requires some initial setup before it can be used. Setup for the User Manual includes the following:

Features – Certain features of the User Manual are set up using the System Administration module. These features must be set up before the system is used to ensure the system functions as expected. Please refer to the Manage System Settings section of the System Administration Module DFDD for additional information about state-defined features.

The following is a list of applicable system settings:

- ❖ **Apply Caseload Direct To Clinics** - Controls whether caseload allocation is assigned at the local agency level or assigned directly to clinics.
- ❖ **North Carolina (NC) Caseload Calculation Low Threshold** - If the specified computation of participation to caseload falls below the NC Caseload Calculation Low Threshold, the new caseload is computed by multiplying the current caseload by the NC Caseload Calculation Low Multiplier. Only applicable to North Carolina
- ❖ **NC Caseload Calculation High Threshold** - If the specified computation of participation to caseload falls above the NC Caseload Calculation High Threshold, the new caseload is computed

by multiplying the current caseload by the NC Caseload Calculation High Multiplier. Only applicable to North Carolina.

- ❖ **NC Caseload Calculation Low Multiplier** - If the specified computation of participation to caseload falls below the NC Caseload Calculation Low Threshold, this defines the multiplier used against the current caseload to compute the new caseload. Only applicable to North Carolina.
- ❖ **NC Caseload Calculation High Multiplier** - If the specified computation of participation to caseload falls above the NC Caseload Calculation High Threshold, this defines the multiplier used against the current caseload to compute the new caseload. Only applicable to North Carolina.
- ❖ **State FIPS Codes to Filter By** – Uses the FIPS Code(s) to define the geographical regions defined by the state. If multiple codes are specified, they should be separated by a semicolon. (i.e. 35;36) In the Caseload module, these codes can be used in the Eligibility Data screens.

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2- ALLOCATE CASELOAD

Assign State Caseload

The Crossroads System will allow entry of the state-wide caseload, which may be derived by the state from the forecast model and other external information. States may configure Crossroads to apply the historic seasonal participation factor to derive a monthly caseload assignment. Statewide threshold alerts for caseload will be defined.

Assignment of state-wide caseload is required. The total allocation of caseload to agencies (or total allocation of caseload to clinics, if configured for clinics) cannot exceed the state caseload.

States may choose to update the state-wide caseload based on changes in food costs or food funds. This is an optional process. Each time any updates are made, the system logs the change history along with the reasons for change.

This process includes the following tasks:

Task A. Assigning State Caseload	2-2
Task B. Updating State Caseload	2-5

Task A. Assigning State Caseload

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Finance → Caseload → Allocate Caseload**. The **Caseload Allocation** screen displays.

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC

Fiscal Year: FFY 2013

Calculation Name: [dropdown] Calculate

Calculation: N/A

Total Caseload: 272000

Publish Reminder Date: [calendar icon]

Global Under-Threshold %: [input] Apply

Global Over-Threshold %: [input] Apply

Caseload Allocated: 0

Publish	Agency	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
<input type="checkbox"/>	LA1 - Western Kansas	25,500	24,484	96.02 %	[input]	[input]			[input]
<input type="checkbox"/>	LA2 - Wichita Area	57,000	56,613	99.32 %	[input]	[input]			[input]
<input type="checkbox"/>	LA3 - Central Kansas	62,300	61,180	98.20 %	[input]	[input]			[input]
<input type="checkbox"/>	LA4 - Northern Kansas	32,200	33,157	102.97 %	[input]	[input]			[input]
<input type="checkbox"/>	LA5 - Kansas City Area	95,000	94,739	99.73 %	[input]	[input]			[input]

Save Cancel

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2. Select the state in the **State/Local Agencies** dropdown, in order to assign caseload at the state and agency levels (or at the state and clinic levels if configuration is set to assign at the clinic level).



Please note that if the system is set to assign first to agencies, it will be possible to further assign to clinics based on agency allocation. This is different than having the system set to do the initial allocation directly to clinics, where agency allocation is rolled up from the clinics.

Monthly Caseload Allocation

State/Local Agencies

Crossroads WIC

LA1 - Central WV WIC - Region 02

LA2 - Shenandoah Valley WIC - Region 06

LA3 - Marion County WIC - Region 02

3. Select the **Fiscal Year** for allocating caseload (FFY, SFY, or Calendar).

The screenshot shows the 'Monthly Caseload Allocation' form. The 'State/Local Agencies' dropdown is set to 'Crossroads WIC'. The 'Fiscal Year' dropdown is open, showing options: FFY (selected), SFY, and Calendar. The year '2013' is displayed next to the dropdown. The 'Calculation Formula' section is collapsed.

4. Select the year for the caseload assignment.

The screenshot shows the 'Monthly Caseload Allocation' form. The 'Fiscal Year' dropdown is set to 'FFY'. The year selection dropdown is open, showing a list of years from 2012 to 2024. The year '2013' is highlighted. The 'Calculation Formula' section is expanded, showing a 'Calculation Name' dropdown and a 'Calculate' button. The 'Total Caseload' field is set to '272,000'. The 'Publish Reminder Date' field is empty. The 'Global Under-Threshold %' and 'Global Over-Threshold %' fields are empty, each with an 'Apply' button. The 'Caseload Allocated' field is set to '270,000'.



The current configuration assigns a uniform monthly caseload for the selected fiscal year. If the system is configured to use a seasonal participation curve, the monthly caseload assignment numbers will be calculated by multiplying the state-wide assigned caseload with the seasonal participation factor for each month.

5. Enter a value in the **Total Caseload** field.



For an initial state caseload for the federal fiscal year, this value may be based on the caseload provided by FNS for the selected fiscal year.

Monthly Caseload Allocation

State/Local Agencies

Crossroads WIC

Calculation Formula

Calculation Name

Calculation

N/A

Total Caseload ★

272,000

Monthly Caseload Allocation

6. After entering the **Total Caseload**, click **Save**. A status message displays indicating the state agency caseload was saved.

Task B. Updating State Caseload

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Finance → Caseload → Allocate Caseload**. The **Caseload Allocation** screen displays.

The screenshot shows the 'Caseload Allocation' screen for user CAROL JONES. The 'Monthly Caseload Allocation' form is displayed with the following details:

- State/Local Agencies:** Crossroads WIC
- Fiscal Year:** FFY 2013
- Calculation Formula:** Calculation Name (empty), Calculation (N/A)
- Total Caseload:** 272000
- Publish Reminder Date:** (empty)
- Global Under-Threshold %:** (empty)
- Global Over-Threshold %:** (empty)
- Caseload Allocated:** 0

The 'Monthly Caseload Allocation' table shows the following data:

Publish	Agency	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
<input type="checkbox"/>	LA1 - Western Kansas	25,500	24,484	96.02 %					
<input type="checkbox"/>	LA2 - Wichita Area	57,000	56,613	99.32 %					
<input type="checkbox"/>	LA3 - Central Kansas	62,300	61,180	98.20 %					
<input type="checkbox"/>	LA4 - Northern Kansas	32,200	33,157	102.97 %					
<input type="checkbox"/>	LA5 - Kansas City Area	95,000	94,739	99.73 %					

At the bottom of the screen, the status bar shows 'Online | Version 0.51.197.14707 | 50049 | CLS - MIAMI COUNTY WIC PROGRAM | TAB | 100%'.

2. Select the state from **State/Local Agencies**.

The screenshot shows the 'State/Local Agencies' dropdown menu with the following options:

- Crossroads WIC
- LA1 - Central WV WIC - Region 02
- LA2 - Shenandoah Valley WIC - Region 06
- LA3 - Marion County WIC - Region 03

3. Choose the **Fiscal Year** (FFY, SFY, and Calendar).

The screenshot shows the 'Fiscal Year' dropdown menu with the following options:

- FFY
- SFY
- Calendar

4. Indicate the year for the current caseload.

5. Type the new value into the **Total Caseload** field.

6. After updating the **Total Caseload**, click **Save**. A status message displays indicating the state agency caseload was saved.

Congratulations!

You have successfully completed the **Assign State Caseload** process.

Assign Clinic Caseload

If Crossroads is configured to **Apply Caseload Direct to Clinics**, when the state is selected in the State/Local Agency dropdown all of the clinics in the state are displayed in the **Monthly Caseload Allocation** grid. This scenario will describe the steps to assign to the clinics, then the agencies will have caseloads that are rolled up from the clinics.

This process is used to assign each clinic its respective caseload. Caseload assignment can be done both by the system and manually. Threshold alerts will be sent to notify staff if the clinic is outside of state-defined caseload performance metrics. Caseload performance is evaluated and alerted on months for which the last day of the month is 30 days past.

The clinic-level caseload recommendation can be determined by a state-defined calculation. Placeholders will be maintained by Crossroads to allow states to create custom formulas to compute the caseload for a clinic.

This also allows WIC staff to modify clinic assigned caseloads at any time during the year.

This process includes the following tasks:

Task A. Calculating Clinic Caseload Using a Calculation Method 2-8

Task B. Allocating Caseload to Clinics 2-13

Task A. Calculating Clinic Caseload Using a Calculation Method

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Finance → Caseload → Allocate Caseload**. The Caseload **Allocation** screen displays.



The configuration has been set to Apply Caseload Direct to Clinics. Therefore clinics are listed in the Monthly Caseload Allocation grid.

2. Select the state from **State/Local Agencies**.

3. Choose the **Fiscal Year** (FFY, SFY, and Calendar).

4. Select the year for the caseload assignment.

Caseload Allocation CAROL JONES

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC

Fiscal Year: FFY 2013

Calculation Formula

Calculation Name: Calculate

Calculation: N/A

Total Caseload: 272,000

Publish Reminder Date: Apply

Global Under-Threshold %: Apply

Global Over-Threshold %: Apply

Caseload Allocated: 270,000

Monthly Caseload Allocation

5. The **Total Caseload** value may be entered if not done in assigning the state caseload.

6. To assign an **Under Threshold Percentage** value to each agency in the state, enter the percentage to the **Global Under-Threshold %** field, then click the corresponding **Apply** button.

Caseload Allocation Ryan Buysse

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC

Fiscal Year: FFY 2013

Calculation Formula

Calculation Name: Calculate

Calculation: N/A

Total Caseload: 272,000

Publish Reminder Date: Apply

Global Under-Threshold %: 98.0 Apply

Global Over-Threshold %: Apply

Caseload Allocated: 0

Monthly Caseload Allocation

Publish	Clinic	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
<input checked="" type="checkbox"/>	CL1 - ATCHISON COUNTY WIC PROGRAM		24,768		98.0 %				
<input checked="" type="checkbox"/>	CL10 - MARSHALL COUNTY WIC PROGRAM		25,399		98.0 %				
<input checked="" type="checkbox"/>	CL11 - NEMAH COUNTY WIC PROGRAM		15,456		98.0 %				
<input checked="" type="checkbox"/>	CL12 - POTTAWATOMIE COUNTY WIC PROGRAM		14,484		98.0 %				
<input checked="" type="checkbox"/>	CL13 - OSAGE COUNTY WIC PROGRAM		23,839		98.0 %				
<input checked="" type="checkbox"/>	CL14 - JACKSON COUNTY WIC PROGRAM		15,644		98.0 %				
<input checked="" type="checkbox"/>	CL2 - DOUGLAS COUNTY WIC PROGRAM		13,054		98.0 %				

Save Cancel

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7. To assign an **Over Threshold Percentage** value to each agency in the state, enter the percentage to the **Global Over-Threshold %** field, then click the corresponding **Apply** button.

Caseload Allocation Ryan Buysse

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC Fiscal Year: FFY 2013

Calculation Formula

Calculation Name: [dropdown] Calculate

Calculation: N/A

Total Caseload: 272,000 Publish Reminder Date: [calendar] Global Under-Threshold %: [input] Apply Global Over-Threshold %: 101.1 Apply Caseload Allocated: 0

Publish	Clinic	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
<input checked="" type="checkbox"/>	CL1 - ATCHISON COUNTY WIC PROGRAM		24,768		98.0 %	101.1 %			
<input checked="" type="checkbox"/>	CL10 - MARSHALL COUNTY WIC PROGRAM		25,399		98.0 %	101.1 %			
<input checked="" type="checkbox"/>	CL11 - NEMAH COUNTY WIC PROGRAM		15,456		98.0 %	101.1 %			
<input checked="" type="checkbox"/>	CL12 - POTTAWATOMIE COUNTY WIC PROGRAM		14,484		98.0 %	101.1 %			
<input checked="" type="checkbox"/>	CL13 - OSAGE COUNTY WIC PROGRAM		23,839		98.0 %	101.1 %			
<input checked="" type="checkbox"/>	CL14 - JACKSON COUNTY WIC PROGRAM		15,644		98.0 %	101.1 %			
<input checked="" type="checkbox"/>	CL2 - DOUGLAS COUNTY WIC PROGRAM		13,054		98.0 %	101.1 %			

Save Cancel

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An alert is sent if the actual participation is over or under the assigned threshold percentage. This happens 30 days after the month has been closed.

8. If a calculation method has not been created, click the **Add** button (+) under **Calculation Formula** to create a new formula. The **Manage Calculation** screen displays.

Monthly Caseload Allocation

State/Local Agencies: Kansas WIC Fiscal Year: FFY 2012

Calculation Formula

Caseload Allocation Calculation

Calculation Name: [dropdown] Calculate

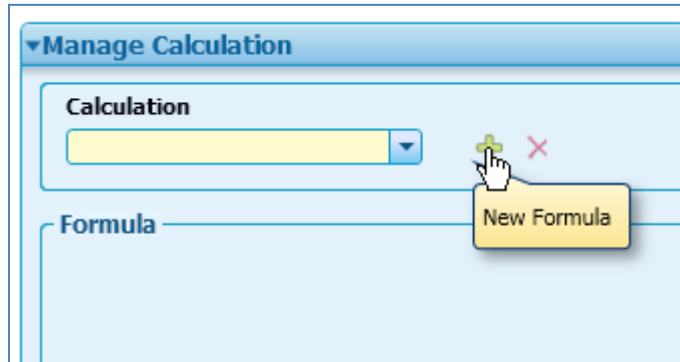
Calculation: N/A

Total Caseload: 225,000 Caseload Allocated: 0

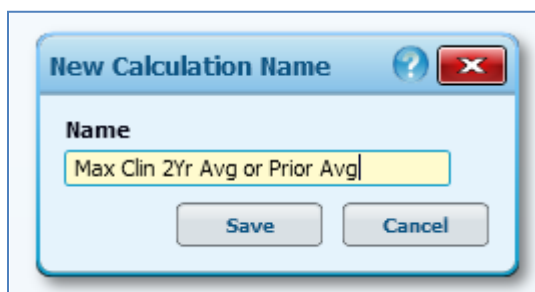
Publish Reminder Date: [calendar] Global Under-Threshold %: [input] Apply Global Over-Threshold %: [input] Apply

Monthly Caseload Allocation Total Items: 14

9. Under **Manage Calculation** click on the **Add** button (+) to name a new formula.



10. Enter a **Name** for the new calculation formula and click **Save**. The **Formula** section is blank and ready for a new calculation formula.



11. Create the formula using **Placeholders**, **Functions**, **Operators**, and **Constant Operand**.



Calculations used for allocating to Clinics can only use Clinic placeholders. Calculations used for allocating to Local Agencies can only use Local Agency placeholders. Trying to use a calculation with the wrong placeholder will display an error message.

Full functionality of the Manage Calculations screen is covered in the Finance User Manual.

12. Click **Save**. A status message indicates the formula was saved successfully.

13. When the formula is saved click **Cancel** to return to the **Caseload Allocation** screen.
14. Under **Caseload Allocation Calculation**, select the formula to use and click **Calculate**. Each clinic will show a calculated allocation based on the formula used.

Task B. Allocating Caseload to Clinics

Complete the following steps to perform this task:

- For each clinic, either select the **Calculated Caseload** to assign by clicking on the **Right Arrow** button (➡) to move the figure into the **Assigned Caseload** field, or enter an assigned caseload manually into the **Assigned Caseload** field. Click the **Right Arrow** button (➡) in the column header to assign the **Calculated Caseload** to all clinics. The **Monthly Caseload Allocation** table updates to show the clinics with the calculated caseloads.

The screenshot shows the 'Monthly Caseload Allocation' application. At the top, there are fields for 'State/Local Agencies' (Crossroads WIC) and 'Fiscal Year' (FFY 2013). Below this is the 'Calculation Formula' section, which includes a 'Calculation Name' dropdown (Max Clin 2Yr Avg or Prior Avg) and a 'Calculate' button. The calculation formula is displayed as: $\text{MAX}(\{(\text{Clinic 2-Year-Ago Avg Participation}) + (\text{Clinic Prior-Year Avg Participation}) / 2\}, \{(\text{Clinic Prior-Year Avg Participation})\})$. Below the formula are fields for 'Total Caseload' (272,000), 'Publish Reminder Date', 'Global Under-Threshold %' (101.1%), and 'Global Over-Threshold %' (101.1%). The 'Caseload Allocated' is 24,872. The main table, titled 'Monthly Caseload Allocation', has columns: Publish, Clinic, Prior Year Caseload Assignment, Prior Year Average Participation, Prior Year Achievement Rate, Under Threshold Percentage, Over Threshold Percentage, Current Caseload Assignment, Calculated Caseload, and Assigned Caseload. The first row shows 'CL1 - ATCHISON COUNTY WIC PROGRAM' with a calculated caseload of 24,872 and an assigned caseload of 24,872. A red box highlights the 'Assigned Caseload' field.

- Click in the checkbox to the left of each clinic's row to have the caseload assignment published, or click in the top checkbox to publish all clinics.
- Enter a date in the **Publish Reminder Date** field, if you do not plan to immediately publish the allocation results.

The screenshot shows the 'Publish Reminder Date' field with the date 2/25/2013. A red box highlights the date field. Below the date field is a calendar for February 2013. A red arrow points to the date 2/25/2013 on the calendar.

Congratulations!

You have successfully completed the **Assign Clinic Caseload** process.

Assign Agency Caseload

If Crossroads is not configured to **Apply Caseload Direct to Clinics**, when the state is selected all of the agencies in the state are displayed in the **Monthly Caseload Allocation** grid. This scenario will cover state-wide assignment to agencies.

This process is used to assign each agency and clinic its respective caseload. Caseload assignment can be done both by the system and manually. Threshold alerts will be sent to notify staff if the agency or clinic is outside of state-defined caseload performance metrics. Caseload performance is evaluated and alerted on months for which the last day of the month is 30 days past.

The agency-level caseload recommendation can be determined by a state-defined calculation. Placeholders will be maintained by Crossroads to allow states to create custom formulas to compute the caseload for an agency. Crossroads supports the use of a 3-year weighted participation formula as requested by some states.

This also allows WIC staff to modify agency and clinic assigned caseloads at any time during the year.

Reallocating Agency-Clinic Caseload: This function is used to reassign each agency and clinic its respective caseload using state-defined formulas. It allows for threshold alarms to be changed in order to alert staff if the agency or clinic is outside of state-defined caseload performance metrics. Caseload performance is evaluated and alerted on months for which the last day of the month is 30 days past.

This process includes the following tasks:

Task A. Calculating Agency Caseload Using a Calculation Method.....	2-15
Task B. Allocate Caseload to Agencies	2-18
Task C. Allocating Clinic Caseload (Based on Agency Assignment)	2-20
Task D. Reallocating Agency Caseload	2-23

Task A. Calculating Agency Caseload Using a Calculation Method

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Finance → Caseload → Allocate Caseload**. The **Caseload Allocation** screen displays.

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC

Fiscal Year: FFY 2013

Calculation Name: [Dropdown] Calculate

Calculation: N/A

Total Caseload: 0

Publish Reminder Date: [Field]

Global Under-Threshold %: [Field] Apply

Global Over-Threshold %: [Field] Apply

Caseload Allocated: 0

Agency	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
LA1 - Western Kansas	25,500	24,484	96.02 %	[Field]	[Field]			[Field]
LA2 - Wichita Area	57,000	56,613	99.32 %	[Field]	[Field]			[Field]
LA3 - Central Kansas	62,300	61,180	98.20 %	[Field]	[Field]			[Field]
LA4 - Northern Kansas	32,100	33,157	103.29 %	[Field]	[Field]			[Field]
LA5 - Kansas City Area	95,000	94,739	99.73 %	[Field]	[Field]			[Field]

Save Cancel

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2. Select the state from **State/Local Agencies**. Under **Monthly Caseload Allocation** the agencies display as shown above in step 1.

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC

Calculation Name: [Dropdown] Calculate

Calculation: N/A

Total Caseload: 0

Publish Reminder Date: [Field]

Global Under-Threshold %: [Field] Apply

Global Over-Threshold %: [Field] Apply

Caseload Allocated: 0

Save Cancel

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3. Choose the **Fiscal Year** (FFY, SFY, and Calendar).

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC

Fiscal Year: FFY 2012

Calculation Name: [Dropdown] Calculate

Calculation: N/A

Total Caseload: 0

Publish Reminder Date: [Field]

Global Under-Threshold %: [Field] Apply

Global Over-Threshold %: [Field] Apply

Caseload Allocated: 0

Save Cancel

Online | Version 0.52.201.14855 | 50049 | 1 - Crossroads WIC | TAB | 100%

4. Select the year for the caseload assignment.

5. The **Total Caseload** and the two **Global Under** and **Over Threshold** values may be entered if this was not done in assigning the state caseload.
6. If a calculation method has not been created, click the **Add** button (+) under **Calculation Formula** to create a new formula. The **Manage Calculation** screen displays.

7. Under **Manage Calculation** click on the **Add** button (+) to name a new formula.

8. Enter a **Name** for the new calculation formula and click **Save**. The **Formula** section is blank and ready for a new calculation formula.

▼ Calculation Formula

Caseload Allocation Calculation

Calculation Name

Max Ag 2 Yr Avg Or Prior Avg Partic. ▼

+

Calculate

Calculation

$$\text{MAX}(\{ \text{Agency 2-Year-Ago Avg Participation} \} + \{ \text{Agency Prior-Year Avg Participation} \} / 2, \{ \text{Agency Prior-Year Avg Participation} \})$$

- When the formula is saved click **Cancel** to return to the **Caseload Allocation** screen.
- Under **Caseload Allocation Calculation**, select the formula to use and click **Calculate**. The **Monthly Caseload Allocation** table updates to show the agencies with the calculated caseloads. Each agency will show a calculated allocation based on the formula used.

Home Family Services Scheduling Vendor Operations Finance Administration Help
Caseload Allocation Ryan Buysse Logout

Monthly Caseload Allocation

State/Local Agencies

Crossroads WIC
▼

Fiscal Year

FFY

▼

2013

▼

▼ Calculation Formula
?

Calculation Name

Max Ag 2 Yr Avg Or Prior Avg Partic.
▼

Calculation

MAX((((Agency 2-Year-Ago Avg Participation) + (Agency Prior-Year Avg Participation)) / 2), (Agency Prior-Year Avg Participation))

Total Caseload

272,000

Publish Reminder Date

Global Under-Threshold %

Global Over-Threshold %

Caseload Allocated

0

Monthly Caseload Allocation
?

Publish	Agency	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload		Assigned Caseload
<input checked="" type="checkbox"/>	LA1 - Western Kansas	25,500	24,484	96.02 %	<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>		24,532		<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>
<input checked="" type="checkbox"/>	LA2 - Wichita Area	57,000	56,613	99.32 %	<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>		56,613		<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>
<input checked="" type="checkbox"/>	LA3 - Central Kansas	62,300	61,180	98.20 %	<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>		61,180		<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>
<input checked="" type="checkbox"/>	LA4 - Northern Kansas	32,100	33,157	103.29 %	<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>		33,290		<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>
<input checked="" type="checkbox"/>	LA5 - Kansas City Area	95,000	94,739	99.73 %	<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>	<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>		94,739		<div style="border: 1px solid #ccc; width: 40px; height: 20px;"></div>

Save

Cancel

Online Version 0.52-201.14855 50049
1 - Crossroads WIC
TAB 100%

Task B. Allocate Caseload to Agencies

Complete the following steps to perform this task:

- For each agency, either select the **Calculated Caseload** to assign by clicking on the **Right Arrow** button (→) to move the figure into the **Assigned Caseload** field, or enter an assigned caseload manually into the **Assigned Caseload** field. Click the **Right Arrow** button (→) in the column header to assign the **Calculated Caseload** to all agencies.

<div>Caseload Allocated 271,371</div>			
Total Items: 5			
Caseload nt	Calculated Caseload	→	Assigned Caseload
	24,532	→	24,532
	56,613	→	56,600
	61,180	→	62,000
	33,290	→	33,500
	94,739	→	94,739



Caseload Allocated represents the total caseload that is currently assigned to agencies.

- Click in the checkbox to the left of each agency's row to have the caseload assignment published, or click in the top checkbox to publish all agencies.

Total Caseload

★

272,000

Check to Publish All

Monthly Caseload Allocation

Publish	Agency
<input checked="" type="checkbox"/>	
<input checked="" type="checkbox"/>	LA1 - Western Kansas
<input checked="" type="checkbox"/>	LA2 - Wichita Area
<input checked="" type="checkbox"/>	LA3 - Central Kansas
<input checked="" type="checkbox"/>	LA4 - Northern Kansas
<input checked="" type="checkbox"/>	LA5 - Kansas City Area



When the caseload is published it is available to the local agencies (or clinics) to view. A task is created alerting the staff that the caseload allocation has been published.

3. Enter a date in the **Publish Reminder Date** field if you do not plan to publish all the assigned agencies immediately.

The screenshot shows a software interface with a 'Publish Reminder Date' field and a calendar. The field contains the date '2/25/2013' and is highlighted with a red box. A red arrow points from the field to the date '25' in the calendar. The calendar is for February 2013 and shows the following dates:

Su	Mo	Tu	We	Th	Fr	Sa
27	28	29	30	31	1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	1	2
3	4	5	6	7	8	9

Task C. Allocating Clinic Caseload (Based on Agency Assignment)

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Finance** → **Caseload** → **Allocate Caseload**. The **Caseload Allocation** screen displays.

Caseload Allocation Ryan Buysse Logout

Home Family Services Scheduling Vendor Operations Finance Administration Help

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC Fiscal Year: FFY 2013

Calculation Formula: Calculation Name: [Dropdown] Calculate

Calculation: N/A

Total Caseload: 272,000 Publish Reminder Date: 2/25/2013 Global Under-Threshold %: [Input] Global Over-Threshold %: [Input] Caseload Allocated: 271,371

Publish	Agency	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
<input checked="" type="checkbox"/>	LA1 - Western Kansas	25,500	24,484	96.02 %	[Input]	[Input]	24,532	24,532	24,532
<input checked="" type="checkbox"/>	LA2 - Wichita Area	57,000	56,613	99.32 %	[Input]	[Input]	56,600	56,613	56,600
<input checked="" type="checkbox"/>	LA3 - Central Kansas	62,300	61,180	98.20 %	[Input]	[Input]	62,000	61,180	62,000
<input checked="" type="checkbox"/>	LA4 - Northern Kansas	32,100	33,157	103.29 %	[Input]	[Input]	33,500	33,290	33,500
<input checked="" type="checkbox"/>	LA5 - Kansas City Area	95,000	94,739	99.73 %	[Input]	[Input]	94,739	94,739	94,739

Save Cancel

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2. Select a local agency from **State/Local Agencies**.

Monthly Caseload Allocation

State/Local Agencies: LA2 - Wichita Area

Crossroads WIC

LA1 - Western Kansas

LA2 - Wichita Area

LA3 - Central Kansas

LA4 - Northern Kansas

LA5 - Kansas City Area

Calculate

3. Select a formula from the **Calculation Name** dropdown that will calculate allocation to clinics.

Calculation Formula

Calculation Name: [Dropdown]

Max Ag 2 Yr Avg Or Prior Avg Partic.

Max Clin 2Yr Avg or Prior Avg

Calculate

4. Click **Calculate**.

Calculation Formula

Calculation Name
 Max Clin 2Yr Avg or Prior Avg

Calculation

$$\text{MAX}(\{ \text{Clinic 2-Year-Ago Avg Participation} \} + \{ \text{Clinic Prior-Year Avg Participation} \} / 2, \{ \text{Clinic Prior-Year Avg Participation} \})$$

Calculate

5. The values in the **Calculated Caseload** column update to show the new suggested caseload, based on the calculation formula that was just executed. Review the caseload allocation calculation suggested caseload for the clinics.

Don't Forget To Save! Caseload Allocation Ryan Buysse

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Monthly Caseload Allocation

State/Local Agencies: LA2 - Wichita Area Fiscal Year: FFY 2013

Calculation Formula

Calculation Name
 Max Clin 2Yr Avg or Prior Avg

Calculation

$$\text{MAX}(\{ \text{Clinic 2-Year-Ago Avg Participation} \} + \{ \text{Clinic Prior-Year Avg Participation} \} / 2, \{ \text{Clinic Prior-Year Avg Participation} \})$$

Total Caseload: 57,000 Publish Reminder Date: Global Under-Threshold %: Global Over-Threshold %: Caseload Allocated: 56,710

Monthly Caseload Allocation

Publish	Clinic	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
<input type="checkbox"/>	CL2 - DOUGLAS COUNTY WIC PROGRAM		13,054					13,054	13,054
<input type="checkbox"/>	CL3 - LEAVENWORTH COUNTY WIC PROGRAM		27,495					27,592	27,592
<input type="checkbox"/>	CL4 - DONIPHAN COUNTY WIC PROGRAM		16,064					16,064	16,064

Save Cancel

Online | Version 0.52.201.14855 | 50049 1 - Crossroads WIC TAB 100%

6. To accept the **Calculated Caseload** value, click on the associated **Right Arrow** button (➡) for the desired Clinic to move the value into the **Assigned Caseload** field, or click the **Right Arrow** button (➡) in the header row to assign the **Calculated Caseload** value to all clinics.

Caseload Allocation Ryan Buysse

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Monthly Caseload Allocation

State/Local Agencies: LA2 - Wichita Area Fiscal Year: FFY 2013

Calculation Formula

Calculation Name: Max Clin 2Yr Avg or Prior Avg Calculate

Calculation: $\text{MAX}(((\text{Clinic 2-Year-Ago Avg Participation}) + (\text{Clinic Prior-Year Avg Participation})) / 2), (\text{Clinic Prior-Year Avg Participation}))$

Total Caseload: 57,000 Publish Reminder Date: Global Under-Threshold %: Global Over-Threshold %: Caseload Allocated: 56,710 Assign All Clinics

Monthly Caseload Allocation Total Items: 0

Publish	Clinic	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
<input checked="" type="checkbox"/>	CL2 - DOUGLAS COUNTY WIC PROGRAM		13,054					13,054	➡ 13,054
<input checked="" type="checkbox"/>	CL3 - LEAVENWORTH COUNTY WIC PROGRAM		27,495					27,592	➡ 27,592
<input checked="" type="checkbox"/>	CL4 - DONIPHAN COUNTY WIC PROGRAM		16,064					16,064	➡ 16,064

Save Cancel

Online Version 0.52.201.14855 50049 1 - Crossroads WIC TAB 100%

7. When all clinics have been assigned, click **Save**. A status message indicates caseloads have been assigned.

Task D. Reallocating Agency Caseload

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Finance → Caseload → Allocate Caseload**. The **Caseload Allocation** screen displays.

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC

Fiscal Year: FFY 2013

Calculation Name: Caseload Reallocation

Calculate

Calculation: MIN({Agency Current-Year Caseload Assignment}, {Agency Current-Year Avg Participation})

Agency	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
LA1 - Western Kansas	25,500	24,484	96.02 %			24,532	24,532	24,532
LA2 - Wichita Area	57,000	56,613	99.32 %			56,600	56,613	56,600
LA3 - Central Kansas	62,300	61,180	98.20 %			62,000	61,180	62,000
LA4 - Northern Kansas	32,100	33,157	103.29 %			33,500	33,290	33,500
LA5 - Kansas City Area	95,000	94,739	99.73 %			94,739	94,739	94,739

Save Cancel

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2. Select the state from the **State/Local Agencies** dropdown.

Monthly Caseload Allocation

State/Local Agencies

Crossroads WIC

LA1 - Central WV WIC - Region 02

LA2 - Shenandoah Valley WIC - Region 06

LA3 - Marion County WIC - Region 03

3. Select a caseload reallocation formula from the **Calculation Name** dropdown.

Calculation Formula

Caseload Allocation Calculation

Calculation Name: Caseload Reallocation

Calculate

Calculation: MIN({Agency Current-Year Caseload Assignment}, {Agency Current-Year Avg Participation})

4. Click **Calculate**.
5. The values in the **Calculated Caseload** column update to show the new suggested caseload, based on the calculation formula that was just executed. Review the calculated caseload reallocation suggested caseload for the agencies that were under or over the threshold values.

Don't Forget To Save! Caseload Allocation Ryan Buysse Logout

Home Family Services Scheduling Vendor Operations Finance Administration Help

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC Fiscal Year: FFY 2013

Calculation Formula: Calculation Name: Caseload Reallocation Calculate

Calculation: MIN([Agency Prior-Year Avg Participation], [Agency Current-Year Avg Participation])

Total Caseload: 272,000 Publish Reminder Date: 2/25/2013 Global Under-Threshold %: Apply Global Over-Threshold %: Apply Caseload Allocated: 271,323

Monthly Caseload Allocation

Total Items: 5

Publish	Agency	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
<input checked="" type="checkbox"/>	LA1 - Western Kansas	25,500	24,484	96.02 %			24,532	24,484	24,484
<input checked="" type="checkbox"/>	LA2 - Wichita Area	57,000	56,613	99.32 %			56,600	56,613	56,600
<input checked="" type="checkbox"/>	LA3 - Central Kansas	62,300	61,180	98.20 %			62,000	61,180	62,000
<input checked="" type="checkbox"/>	LA4 - Northern Kansas	32,100	33,157	103.29 %			33,500	33,157	33,500
<input checked="" type="checkbox"/>	LA5 - Kansas City Area	95,000	94,739	99.73 %			94,739	94,739	94,739

Save Cancel

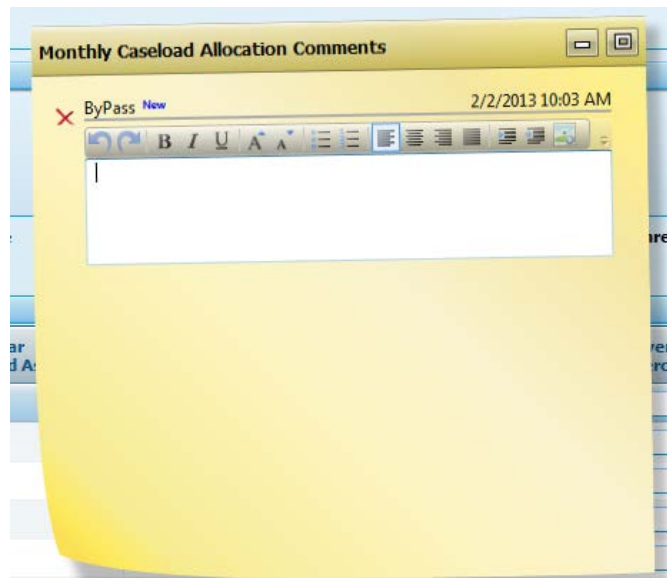
Online Version 0.52.201.14855 50049 1 - Crossroads WIC TAB 100%

6. To accept the **Calculated Caseload** value, click on the associated **Right Arrow** button (➡) for the desired agency to move the value into the **Assigned Caseload** field. You may also manually enter a new assigned caseload.

Total Items: 5

Caseload Assignment	Calculated Caseload	➡	Assigned Caseload
24,532	24,484	➡	24,484
56,600	56,613	➡	56,600
62,000	61,180	➡	61,000
33,500	33,157	➡	35,000
94,739	94,739	➡	94,739

7. A **Sticky Note** is available for documenting the reasons for reallocating caseload. Click the icon and the **Sticky Note** popup window is displayed.



8. Click **Save**. A status message indicates the new assigned caseload has been saved.

Congratulations!

You have successfully completed the **Assign Agency Caseload** process.

Manage Over or Under-Achieving Agencies

At times it may be necessary to modify the caseload assignment for one or more agencies that are over or under-achieving. This is an optional process and can be used as applicable or desired.

Crossroads provides the functionality to define a calculation that will recommend a new caseload based on the agency's year-to-date performance. The calculation can determine what caseload allocation would result in a 100% achievement rate (approximately), based on historical participation. If the system is configured to utilize seasonal variation as defined in the forecast model, the system will take it into account to recommend caseload values. States may choose to not apply a seasonal participation curve within the forecast model without negating this process.

Recommended caseload values for agencies can be calculated so that no net-change occurs at the state (or agency) level. Likewise, manually entered values will not be allowed to affect an increase or decrease in the state (or agency) total caseload.

This process includes the following tasks:

Task A. Managing Over or Under-Achieving Agencies..... 2-27

Task A. Managing Over or Under-Achieving Agencies

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Finance → Caseload → Allocate Caseload**. The **Caseload Allocation** screen displays.

Caseload Allocation Ryan Buysse

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC Fiscal Year: FFY 2013

Calculation Formula

Calculation Name: Calculate

Calculation: N/A

Total Caseload: 272,000 Publish Reminder Date: 2/25/2013 Global Under-Threshold %: Apply Global Over-Threshold %: Apply Caseload Allocated: 271,371

Monthly Caseload Allocation Total Items: 5

Publish	Agency	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
<input checked="" type="checkbox"/>	LA1 - Western Kansas	25,500	24,484	96.02 %	98.0 %	101.1 %	24,532	24,532	24,532
<input checked="" type="checkbox"/>	LA2 - Wichita Area	57,000	56,613	99.32 %	98.0 %	101.1 %	56,600	56,613	56,600
<input checked="" type="checkbox"/>	LA3 - Central Kansas	62,300	61,180	98.20 %	98.0 %	101.1 %	62,000	61,180	62,000
<input checked="" type="checkbox"/>	LA4 - Northern Kansas	32,100	33,157	103.29 %	98.0 %	101.1 %	33,500	33,290	33,500
<input checked="" type="checkbox"/>	LA5 - Kansas City Area	95,000	94,739	99.73 %	98.0 %	101.1 %	94,739	94,739	94,739

Save Cancel

Online Version 0.52.201.14855 | 50049 1 - Crossroads WIC **TAB** 100%



An alert is sent when an agency falls below the Under Threshold Percentage or above the Over Threshold Percentage. Use this process to calculate an Assigned Caseload value or manually enter a new one.

2. Select a **Calculation Name**, and then click **Calculate**.

Caseload Allocation Ryan Buysse

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC Fiscal Year: FFY 2013

Calculation Formula

Calculation Name: Max Ag 2 Yr Avg Or Prior Avg Partic... Max Cln 2Yr Avg or Prior Avg Caseload Reallocation Calculate

Total Caseload: 272,000 Publish Reminder Date: 2/25/2013 Global Under-Threshold %: Apply Global Over-Threshold %: Apply Caseload Allocated: 271,371

Monthly Caseload Allocation Total Items: 5

Publish	Agency	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
<input checked="" type="checkbox"/>	LA1 - Western Kansas	25,500	24,484	96.02 %	98.0 %	101.1 %	24,532	24,532	24,532
<input checked="" type="checkbox"/>	LA2 - Wichita Area	57,000	56,613	99.32 %	98.0 %	101.1 %	56,600	56,613	56,600
<input checked="" type="checkbox"/>	LA3 - Central Kansas	62,300	61,180	98.20 %	98.0 %	101.1 %	62,000	61,180	62,000
<input checked="" type="checkbox"/>	LA4 - Northern Kansas	32,100	33,157	103.29 %	98.0 %	101.1 %	33,500	33,290	33,500
<input checked="" type="checkbox"/>	LA5 - Kansas City Area	95,000	94,739	99.73 %	98.0 %	101.1 %	94,739	94,739	94,739

Save Cancel

Online | Version 0.52.201.14855 | 50049 | 1 - Crossroads WIC | **TAB** | 100%

3. Review the system **Calculated Caseload** values based on the calculation that was applied (as shown in the outlined box below).

Caseload Allocation Ryan Buysse

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC Fiscal Year: FFY 2013

Calculation Formula

Calculation Name: Max Ag 2 Yr Avg Or Prior Avg Partic... Calculate

Calculation:
$$\text{MAX}(((\text{Agency 2-Year-Ago Avg Participation}) + (\text{Agency Prior-Year Avg Participation})) / 2), (\text{Agency Prior-Year Avg Participation}))$$

Total Caseload: 272,000 Publish Reminder Date: 2/25/2013 Global Under-Threshold %: Apply Global Over-Threshold %: Apply Caseload Allocated: 271,371

Monthly Caseload Allocation Total Items: 5

Publish	Agency	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
<input checked="" type="checkbox"/>	LA1 - Western Kansas	25,500	24,484	96.02 %	98.0 %	101.1 %	24,532	24,532	24,532
<input checked="" type="checkbox"/>	LA2 - Wichita Area	57,000	56,613	99.32 %	98.0 %	101.1 %	56,600	56,613	56,600
<input checked="" type="checkbox"/>	LA3 - Central Kansas	62,300	61,180	98.20 %	98.0 %	101.1 %	62,000	61,180	62,000
<input checked="" type="checkbox"/>	LA4 - Northern Kansas	32,100	33,157	103.29 %	98.0 %	101.1 %	33,500	33,290	33,500
<input checked="" type="checkbox"/>	LA5 - Kansas City Area	95,000	94,739	99.73 %	98.0 %	101.1 %	94,739	94,739	94,739

Save Cancel

Online | Version 0.52.201.14855 | 50049 | 1 - Crossroads WIC | **TAB** | 100%

4. To accept the recommended **Calculated Caseload** value for an agency, click on the corresponding **Right Arrow** button (➡).

Caseload Allocation Ryan Buysse

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC Fiscal Year: FFY 2013

Calculation Formula

Calculation Name: Max Ag 2 Yr Avg Or Prior Avg Partic. Calculate

Calculation: $\text{MAX}(((\text{Agency 2-Year-Ago Avg Participation}) + (\text{Agency Prior-Year Avg Participation})) / 2), (\text{Agency Prior-Year Avg Participation}))$

Total Caseload: 272,000 Publish Reminder Date: 2/25/2013 Global Under-Threshold %: Apply Global Over-Threshold %: Apply Caseload Allocated: 270,551

Monthly Caseload Allocation Total Items: 5

Publish	Agency	Prior Year Caseload Assignment	Prior Year Average Participation	Prior Year Achievement Rate	Under Threshold Percentage	Over Threshold Percentage	Current Caseload Assignment	Calculated Caseload	Assigned Caseload
<input checked="" type="checkbox"/>	LA1 - Western Kansas	25,500	24,484	96.02 %	98.0 %	101.1 %	24,532	24,532	24,532
<input checked="" type="checkbox"/>	LA2 - Wichita Area	57,000	56,613	99.32 %	98.0 %	101.1 %	56,600	56,613	56,600
<input checked="" type="checkbox"/>	LA3 - Central Kansas	62,300	61,180	98.20 %	98.0 %	101.1 %	62,000	61,180	61,180
<input checked="" type="checkbox"/>	LA4 - Northern Kansas	32,100	33,157	103.29 %	98.0 %	101.1 %	33,500	33,290	33,500
<input checked="" type="checkbox"/>	LA5 - Kansas City Area	95,000	94,739	99.73 %	98.0 %	101.1 %	94,739	94,739	94,739

Save Cancel

Online Version 0.52.201.14855 | 50049 1 - Crossroads WIC TAB 100%

5. To accept the recommended **Calculated Caseload** value for all agencies, click on the **Right Arrow** button (➡) in the column header. The **Assigned Caseload** for all agencies is populated from the **Calculated Caseload** values. It would still be possible to change one or more agency's **Assigned Caseload** manually.

Total Items: 5

Current Caseload Assignment	Calculated Caseload	➡	Assigned Caseload
24,532	24,532	➡	24,532
56,600	56,613	➡	56,600
62,000	61,180	➡	61,180
33,500	33,290	➡	33,500
94,739	94,739	➡	94,739

6. To adjust the **Assigned Caseload** value manually, delete the existing value and type in a new one.

Total Items: 5 ?			
Current Caseload Assignment	Calculated Caseload		Assigned Caseload
24,532	24,532	➡	24,532
56,600	56,613	➡	56,600
62,000	61,180	➡	61,180
33,500	33,290	➡	33,400
94,739	94,739	➡	94,739

7. Click **Save**. A status message indicates caseload was assigned successfully.

Congratulations!

You have successfully completed the **Manage Over or Under-Achieving Agencies** process.

3- ALLOCATE CASELOAD AND NSA FUNDING

Allocate Caseload and NSA Funding

The following scenario describes the process of allocating caseload and NSA funding.

This process includes the following task:

Task A. Allocating Caseload and NSA Funding 3-2

Task A. Allocating Caseload and NSA Funding

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Finance → Caseload → Allocate Caseload and NSA Funding**. The **Caseload and NSA Allocation** screen displays.

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC

Fiscal Year: FFY 2013

Caseload Calculation Formula: Calculation Name: [Empty] Calculation: N/A

Calculate

Total Caseload: 272,000

Caseload Allocated: 272,000

Fund Amount Per Case: \$220.00

Total Funding Available: \$60,713,300

State Fund Allocation: \$33

Funding Allocated: \$59,840,000

Funding Remaining: \$873,267

Agency	Prior Year Achievement Rate	Calculated Caseload	Assigned Caseload	Current Caseload Assignment	Calculated Funding	Assigned Funding	Current Fund Assignment
LA1 - Western Kansas	96.02 %	24,532	23,500	24,532	\$5,170,000	\$5,170,000	\$444
LA4 - Northern Kansas	103.29 %	33,290	36,000	33,500	\$7,920,000	\$7,920,000	\$100
LA2 - Wichita Area	99.32 %	56,613	56,500	56,600	\$12,430,000	\$12,430,000	\$100
LA3 - Central Kansas	98.20 %	61,180	61,500	62,000	\$13,530,000	\$13,530,000	\$100
LA5 - Kansas City Area	99.73 %	94,739	94,500	94,739	\$20,790,000	\$20,790,000	\$100

Save Cancel

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2. Select an option in the **State/Local Agencies** drop-down list.



Please note that if the system is set to assign first to agencies, it will be possible to further assign to clinics based on agency allocation. This is different than having the system set to do the initial allocation to clinics, where the agency allocation is rolled up from the clinics.

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC

Calculate

3. Select the **Fiscal Year** for allocating caseload (FFY, SFY, or Calendar).

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC

Fiscal Year: FFY (selected), 2013

Caseload Calculation Formula: Calculation Name [] Calculate

Total Caseload: 272,000

Total Fund: \$60,713,300

4. Select the year for the caseload assignment.

Monthly Caseload Allocation

State/Local Agencies: Crossroads WIC

Fiscal Year: FFY

Caseload Calculation Formula: Calculation Name [] Calculate

Total Caseload: 272,000

Total Funding Available: \$60,713,300

Caseload Allocated: 272,000

State Fund Allocation: \$33

Funding Allocated: 2013 (selected)



The current configuration assigns a uniform monthly caseload for the selected fiscal year. If the system is configured to use a seasonal participation curve, the monthly caseload assignment numbers will be calculated by multiplying the state-wide assigned caseload with the seasonal participation factor for each month.

5. If applicable, select a **Calculation Name** and click **Calculate**.

Caseload Calculation Formula

Calculation Name: Max Ag 2 Yr Avg Or Prior Avg Partic. (selected)

Calculate

Calculation: $\text{MAX}(\{ \text{Agency 2-Year-Ago Avg Participation} \} + \{ \text{Agency Prior-Year Avg Participation} \} / 2, \{ \text{Agency Prior-Year Avg Participation} \})$

6. Enter the **Total Caseload**.



For an initial state caseload for the federal fiscal year, this value may be based on the caseload provided by FNS for the selected fiscal year.

7. Enter the **Fund Amount Per Case**.

8. Enter the **State Fund Allocation**.

Caseload Calculation Formula

Calculation Name: Max Ag 2 Yr Avg Or Prior Avg Partic. (selected)

Calculate

Calculation: $\text{MAX}(\{ \text{Agency 2-Year-Ago Avg Participation} \} + \{ \text{Agency Prior-Year Avg Participation} \} / 2, \{ \text{Agency Prior-Year Avg Participation} \})$

Total Caseload: 272,000

Caseload Allocated: 272,000

Fund Amount Per Case: \$220.00

Total Funding Available: \$60,713,300

State Fund Allocation: \$33

Funding Allocated: \$59,840,000

Funding Remaining: \$873,267

9. For each agency, select the **Right Arrow** button (➡) next to the **Calculated Caseload** column to copy the calculated caseload into the **Assigned Caseload** column, or manually enter the **Assigned Caseload** directly into the column.

Calculated Caseload	➡	Assigned Caseload
24,532	➡	24,400
56,613	➡	56,600
61,180	➡	61,000
33,290	➡	36,000
94,739	➡	94,000



Click Right Arrow button (➡) in the column header to assign the calculated caseload for all records in the Monthly Allocation grid.

10. For each agency, select the **Right Arrow** button (➡) next to the **Calculated Funding** column to copy the calculated caseload into the **Assigned Funding** column, or manually enter the **Assigned Funding** directly into the column.

Calculated Funding	➡	Assigned Funding
\$5,368,000	➡	\$5,368,000
\$12,452,000	➡	\$12,452,000
\$13,420,000	➡	\$13,420,000
\$7,920,000	➡	\$7,920,000
\$20,680,000	➡	\$20,680,000



Click Right Arrow button (➡) in the column header to assign the calculated funding for all records in the Monthly Allocation grid.

11. In the header of the **Monthly Allocation** grid, select the **Publish** check box to publish caseload and funding for all records in the grid.

Monthly Allocation <input checked="" type="checkbox"/> Publish									Total Items: 5
Agency	Prior Year Achievement Rate	Calculated Caseload	➡	Assigned Caseload	Current Caseload Assignment	Calculated Funding	➡	Assigned Funding	Current Fundin Assignment
LA1 - Western Kansas	96.02 %	24,532	➡	24,400	24,532	\$5,368,000	➡	\$5,368,000	\$444
LA2 - Wichita Area	99.32 %	56,613	➡	56,600	56,600	\$12,452,000	➡	\$12,452,000	\$100
LA3 - Central Kansas	98.20 %	61,180	➡	61,000	62,000	\$13,420,000	➡	\$13,420,000	\$100
LA4 - Northern Kansas	103.29 %	33,290	➡	36,000	33,500	\$7,920,000	➡	\$7,920,000	\$100
LA5 - Kansas City Area	99.73 %	94,739	➡	94,000	94,739	\$20,680,000	➡	\$20,680,000	\$100



When the caseload is published it is available to the local agencies (or clinics) to view. A task is created alerting the staff that the caseload allocation has been published.

12. Click **Save**. A status message displays indicating that the state agency caseload was saved.

Congratulations!

You have successfully completed the **Allocate Caseload and NSA Funding** process.

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4- MONITORING CASELOAD

Monitor Caseload

Crossroads provides a screen to monitor caseload at the clinic, agency or state level throughout the fiscal year. Caseload can be monitored on the basis of caseload statistics or participation by category.

This scenario will describe the parameter option settings that can be selected and the resulting monitoring views resulting from the options selected.

If the selection is made to view state data, totals for all agencies are used for all the statistics and for the chart display. If the selection is made to view an agency, either the totals of all clinics or data for a specific clinic is displayed.

This process includes the following task:

Task A. Selecting the Caseload Monitoring Parameters.....	4-2
Task B. Reviewing Caseload Statistics.....	4-4
Task C. Reviewing Participation by Category	4-6
Task D. Reviewing Caseload Monitoring Chart	4-7

Task A. Selecting the Caseload Monitoring Parameters

Complete the following steps to perform this task:

- From the **Home** screen, go to **Finance** → **Caseload** → **Monitor Caseload**. The **Monitor Caseload** screen displays.

Monitor Caseload Ryan Buysse

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Caseload Monitoring

State/Local Agencies: Crossroads WIC Fiscal Year: FFY 2013

Forecast Model: Annual Trends

Caseload Statistics Total Items: 11

	Oct '12	Nov '12	Dec '12	Jan '13	Feb '13	Mar '13	Apr '13	May '13	Jun '13	Jul '13	Aug '13	Sep '13	YTD Average
Assigned Caseload													0
Participation	276,837	276,837	276,849	274,849	178,697	89,244	5						196,188
Previous Year Participation	269,237	269,130	269,180	268,875	267,709	267,337	268,901	269,386	274,102	277,209	275,386	272,902	270,780
Caseload Variance	276,837	276,837	276,849	274,849	178,697	89,244	5						196,188
Achievement Rate	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %						0.0 %
Forecasted Caseload	273,448	273,448	272,629	271,537	269,627	270,446	271,537	271,537	274,539	276,450	276,177	273,721	272,925
Forecasted Caseload Variance	3,389	3,389	4,220	3,312	-90,930	-181,202	-271,532						-75,622
Forecasted Achievement Rate	101.2 %	101.2 %	101.5 %	101.2 %	66.3 %	33.0 %	0.0 %						72.1 %
Non-Participation Rate	2.8 %	-39.0 %	-39.0 %	-38.0 %	10.3 %	55.2 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	100.0 %	46.0 %
Enrollment Count	284,703	199,122	199,128	199,165	199,177	199,164	170,052	139,406	108,755	75,560	39,822	16	151,173
Participation To Enrollment	97.2 %	139.0 %	139.0 %	138.0 %	89.7 %	44.8 %	0.0 %						92.5 %

Participation by Category Total Items: 16

Category	Oct '12	Nov '12	Dec '12	Jan '13	Feb '13	Mar '13	Apr '13	May '13	Jun '13	Jul '13	Aug '13	Sep '13
Pregnant Women	25,167	25,167	25,167	24,987	24,358	16,221	3	0	0	0	0	0
Pregnant Women	24,456	24,452	24,417	24,386	24,349	24,324	24,438	24,473	24,777	24,941	24,847	24,702
Previous Year	9.1 %	9.1 %	9.1 %	9.1 %	9.1 %	9.1 %	9.1 %	9.1 %	9.1 %	9.1 %	9.1 %	9.1 %
Fully Breastfeeding Women	8,389	8,389	8,389	8,329	8,125	1	0	0	0	0	0	0
Fully Breastfeeding Women	3.0 %	3.0 %	3.0 %	3.0 %	4.5 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Previous Year	8,161	8,157	8,146	8,136	8,123	8,113	8,152	8,163	8,266	8,318	8,288	8,240
Partially Breastfeeding Women	16,778	16,778	16,779	16,657	8,125	8,115	0	0	0	0	0	0
Partially Breastfeeding Women	6.1 %	6.1 %	6.1 %	6.1 %	4.5 %	9.1 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Previous Year	16,324	16,317	16,293	16,273	16,245	16,228	16,304	16,326	16,532	16,636	16,576	16,481
Postpartum Women	16,778	16,778	16,780	16,661	8,125	1	0	0	0	0	0	0
Postpartum Women	6.1 %	6.1 %	6.1 %	6.1 %	4.5 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Previous Year	16,326	16,322	16,295	16,277	16,247	16,234	16,309	16,329	16,533	16,638	16,576	16,484
Fully Breastfed Infants	8,389	8,389	8,390	8,332	2	1	0	0	0	0	0	0
Fully Breastfed Infants	3.0 %	3.0 %	3.0 %	3.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Previous Year	8,162	8,158	8,146	8,136	8,123	8,113	8,152	8,163	8,266	8,318	8,288	8,241
Partially Breastfed Infants	33,556	33,556	33,558	33,314	24,371	8,113	0	0	0	0	0	0
Partially Breastfed Infants	12.1 %	12.1 %	12.1 %	12.1 %	13.6 %	9.1 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Previous Year	32,653	32,644	32,594	32,556	32,497	32,466	32,619	32,662	33,067	33,277	33,155	32,969
Fully Formula-Fed Infants	25,167	25,167	25,169	24,985	16,251	16,239	1	0	0	0	0	0
Fully Formula-Fed Infants	9.1 %	9.1 %	9.1 %	9.1 %	9.1 %	18.2 %	20.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Previous Year	24,489	24,485	24,447	24,418	24,373	24,356	24,465	24,495	24,801	24,957	24,866	24,727
Children	142,613	142,613	142,617	141,584	89,341	40,553	1	0	0	0	0	0
Children	51.5 %	51.5 %	51.5 %	51.5 %	50.0 %	45.4 %	20.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %
Previous Year	138,666	138,595	138,409	138,243	138,053	137,869	138,544	138,738	140,464	141,369	140,861	140,032
Previous Year	51.5 %	51.5 %	51.5 %	51.5 %	51.5 %	51.5 %	51.5 %	51.5 %	51.5 %	51.5 %	51.5 %	51.5 %

Caseload Monitoring Chart

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- Select the state or a local agency from **State/Local Agencies**.



If the state is selected for State/Local Agencies, the Forecast Model field is displayed for the selection of a specific model. However, if an agency is selected, the Clinic field is displayed for the selection of all clinics or a specific clinic. Forecasting is only at the state level.

3. Select the **Fiscal Year** type (FFY, SFY, or Calendar) and year. The data will be grouped by the twelve months corresponding to the selected fiscal year.
4. If the state is selected for **State/Local Agencies**, select a **Forecast Model**. If an agency is selected for **State/Local Agencies**, select a specific clinic or select all clinics.



For details on defining a forecast model, refer to the Defining a Forecast Model scenario within the Finance User Manual.

Caseload Monitoring

State/Local Agencies

LA2 - Wichita Area

Clinic

CL3 - LEAVENWORTH COUNTY WIC PROGRAM

CL2 - DOUGLAS COUNTY WIC PROGRAM

CL3 - LEAVENWORTH COUNTY WIC PROGRAM

CL4 - DONIPHAN COUNTY WIC PROGRAM

All

Task B. Reviewing Caseload Statistics

Complete the following steps to perform this task:

- Under **Caseload Statistics**, review the 11 statistics provided for each month plus the **YTD Average** (Year to Date Average). Caseload data are provided for the following:
 - Assigned Caseload:** This is the assigned and funded caseload.

Forecast Model								
Annual Trends								
Caseload Statistics								
	🔒 Oct '12	Nov '12	Dec '12	Jan '13	Feb '13	Mar '13	Apr '13	May '13
Assigned Caseload								
Participation	276,837	276,837	276,849	274,849	178,697	89,244	5	
Previous Year Participation	269,237	269,130	269,180	268,875	267,709	267,337	268,901	269,386
Caseload Variance	276,837	276,837	276,849	274,849	178,697	89,244	5	
Achievement Rate	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	0.0 %	
Forecasted Caseload	273,448	273,448	272,629	271,537	269,627	270,446	271,537	271,537
Forecasted Caseload Variance	3,389	3,389	4,220	3,312	-90,930	-181,202	-271,532	
Forecasted Achievement Rate	101.2 %	101.2 %	101.5 %	101.2 %	66.3 %	33.0 %	0.0 %	
Non-Participation Rate	2.8 %	-39.0 %	-39.0 %	-38.0 %	10.3 %	55.2 %	100.0 %	100.0 %
Enrollment Count	284,703	199,122	199,128	199,165	199,177	199,164	170,052	139,406
Participation To Enrollment	97.2 %	139.0 %	139.0 %	138.0 %	89.7 %	44.8 %	0.0 %	



Closeout data is displayed for months that are closed and is indicated by a Locked Indicator (🔒). Current data is displayed for months not closed, without an indicator. The Forecasted Caseload shows projected participation for future months based on the Forecast Model used.

- **Participation:** The number of persons who received supplemental foods or food instruments during the reporting period (including: 1- infants not receiving supplemental foods or food instruments whose breastfeeding mothers received supplemental foods or food instruments during the reporting period, and 2- breastfeeding mothers not receiving supplemental foods or food instruments whose infants received supplemental foods or food instruments during the reporting period).
- **Previous Year Participation:** Persons who received supplemental foods or food instruments during the previous year reporting period
- **Caseload Variance: Participation** (defined above) minus **Assigned Caseload** (defined above).
- **Achievement Rate: Participation** (defined above) divided by **Assigned Caseload** (defined above).
- **Forecasted Caseload: Assigned Caseload** adjusted by the forecasting model selected on screen.
- **Forecasted Caseload Variance: Participation** (defined above) minus **Forecasted Caseload** (defined above).
- **Forecasted Achievement Rate: Participation** (defined above) divided by **Forecasted Caseload** (defined above).
- **Non-Participation Rate: Enrollment Count** minus **Participation Count** divided by **Participation Count**.
- **Enrollment Count:** Count of certified persons.
- **Participation to Enrollment: Participation** (defined above) divided by **Enrollment Count** (defined above).

Task C. Reviewing Participation by Category

Complete the following steps to perform this task:

1. Under **Participation by Category**, review the statistics for all eight WIC categories (Pregnant, Fully Breastfeeding Women, Partially Breastfeeding Women, Postpartum Women, Fully Breastfeeding Infants, Partially Breastfeeding Infants, Fully Formula-Fed Infants, and Children).

Category	Oct '12	Nov '12	Dec '12	Jan '13	Feb '13	Mar '13	Apr '13	May '13	Jun '13	Jul '13	Aug '13	Sep '13
Pregnant Women	25,167 9.1 %	25,167 9.1 %	25,167 9.1 %	24,987 9.1 %	24,358 13.6 %	16,221 18.2 %	3 60.0 %	0 0.0 %	0 0.0 %	0 0.0 %	0 0.0 %	0 0.0 %
Pregnant Women Previous Year	24,456 9.1 %	24,452 9.1 %	24,417 9.1 %	24,386 9.1 %	24,349 9.1 %	24,324 9.1 %	24,438 9.1 %	24,473 9.1 %	24,777 9.1 %	24,941 9.1 %	24,847 9.1 %	24,702 9.1 %
Fully Breastfeeding Women	8,389 3.0 %	8,389 3.0 %	8,389 3.0 %	8,329 3.0 %	8,125 4.5 %	1 0.0 %	0 0.0 %	0 0.0 %	0 0.0 %	0 0.0 %	0 0.0 %	0 0.0 %
Fully Breastfeeding Women Previous Year	8,161 3.0 %	8,157 3.0 %	8,146 3.0 %	8,136 3.0 %	8,123 3.0 %	8,113 3.0 %	8,152 3.0 %	8,163 3.0 %	8,266 3.0 %	8,318 3.0 %	8,288 3.0 %	8,240 3.0 %
Partially Breastfeeding Women	16,778 6.1 %	16,778 6.1 %	16,779 6.1 %	16,657 6.1 %	8,123 4.5 %	8,115 9.1 %	0 0.0 %	0 0.0 %	0 0.0 %	0 0.0 %	0 0.0 %	0 0.0 %
Partially Breastfeeding Women Previous Year	16,324 6.1 %	16,317 6.1 %	16,293 6.1 %	16,273 6.1 %	16,245 6.1 %	16,228 6.1 %	16,304 6.1 %	16,326 6.1 %	16,532 6.1 %	16,636 6.1 %	16,576 6.1 %	16,481 6.1 %

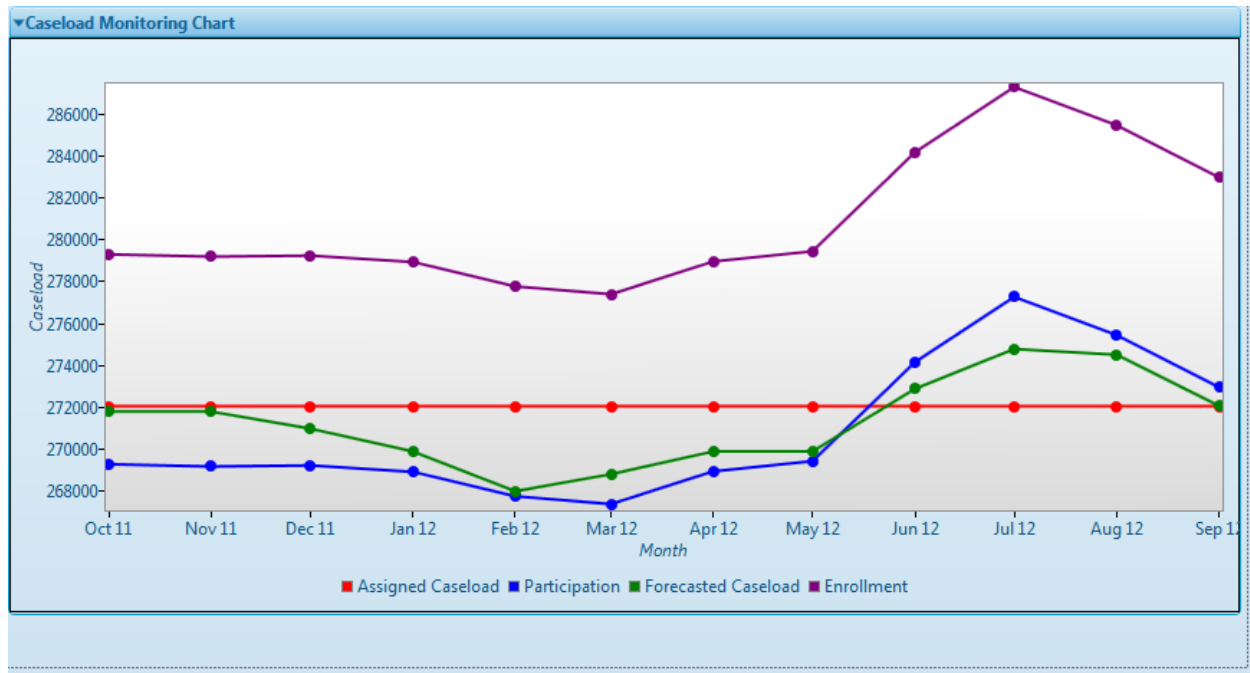


This Participation by Category grid displays the percent breakdown for each of the eight WIC categories for every month with data. The previous year counts and percentages are displayed to provide a comparison between the current and previous year reporting period.

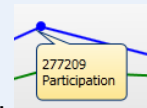
Task D. Reviewing Caseload Monitoring Chart

Complete the following steps to perform this task:

1. Expand the **Caseload Monitoring Chart** section by clicking the expand/collapse arrow.
2. Review the **Caseload Monitoring Chart**. The chart displays the **Assigned Caseload**, **Participation**, **Forecast Caseload** (if state is the selected level), and **Enrollment**.



Hover over a data point to see the detailed statistics for that data.



Congratulations!

You have successfully completed the **Monitor Caseload** process.

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5- MANAGE ELIGIBILITY DATA

Manage Eligibility Data

Potential eligible population is defined as people who may be eligible for WIC benefits.

The **Manage Eligibility Data** screen provides the following functions:

- ❖ Allows for input (manual or file import) of potential eligible population data
- ❖ Allows the view, edit and deletion of existing data
- ❖ Allows for comparison of potential eligibility data to historical actual data within Crossroads
- ❖ Allows exporting a data set in a predefined format that could be used by a Geographic Information System (GIS)

This process includes the following tasks:

Task A. Search for Existing Eligibility Data Sets.....	5-2
Task B. View, Edit, or Delete Existing Eligibility Data.....	5-3
Task C. Upload Existing Eligibility Data.....	5-6
Task D. Add Eligibility Data Manually	5-8
Task E. Compare Eligibility Data	5-11

Task A. Search for Existing Eligibility Data Sets

Complete the following steps to perform this task:

1. From the **Home** screen go to **Finance** → **Caseload** → **Manage Eligibility Data**. The **Manage Eligibility Data** screen displays.

Manage Eligibility Data Frank Rizzo

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

▼ Manage Eligibility Data

Search Existing Potential Eligible Data Sets

Data Level Start Date End Date Search

▼ Search Results Total Items: 0

Data Set Name	Data Set Comments	Date Added	Data Level	Tracking Date	Year
---------------	-------------------	------------	------------	---------------	------

Compare Data Add Data Cancel

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2. To search for existing data select the following:
 - **Data Level** (leave blank if a specified level is not desired)
 - **Start Date** – representing the **Tracking Date** of the **Data Set**
 - **End Date** – representing the **Tracking Date** of the **Data Set**
3. Click **Search**. If there are data sets meeting the criteria, they will be displayed in the **Search Results** grid. If no data set exists matching the search criteria, a status message will indicate no data is available.

Manage Eligibility Data Frank Rizzo

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

▼ Manage Eligibility Data

Search Existing Potential Eligible Data Sets

Data Level Start Date End Date Search

Clinic 3/1/2012 4/3/2012

▼ Search Results Total Items: 0

Data Set Name	Data Set Comments	Date Added	Data Level	Tracking Date	Year
X Clinic Potential Eligible Data 2012	Potential Eligible for Shenandoah Clinic	4/3/2012	Clinic	4/3/2012	2012

Task B. View, Edit, or Delete Existing Eligibility Data

Complete the following steps to perform this task:

1. To view or edit the data set click on the **Edit** button (✎). The **Update Eligibility Data** screen displays.

Update Eligibility Data Frank Rizzo

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Update Data

Data Set Name ★
Clinic Potential Eligible Data 2012

Filter Potential Eligibility Data

Clinic **WIC Category** **Filter**

Eligibility Data Total Items: 5

Clinic	Unit Population	WIC Category
Shenandoah Valley Medical System	80	Pregnant
Shenandoah Valley Medical System	75	Breastfeeding
Shenandoah Valley Medical System	65	Non-Breastfeeding
Shenandoah Valley Medical System	90	Infant

Page 1 of 2

Data Set Details

Tracking Date ★
4/3/2012

Represented Year ★
2012

Data Level ★
Clinic


Description ★
Potential Eligible for Shenandoah Clinic

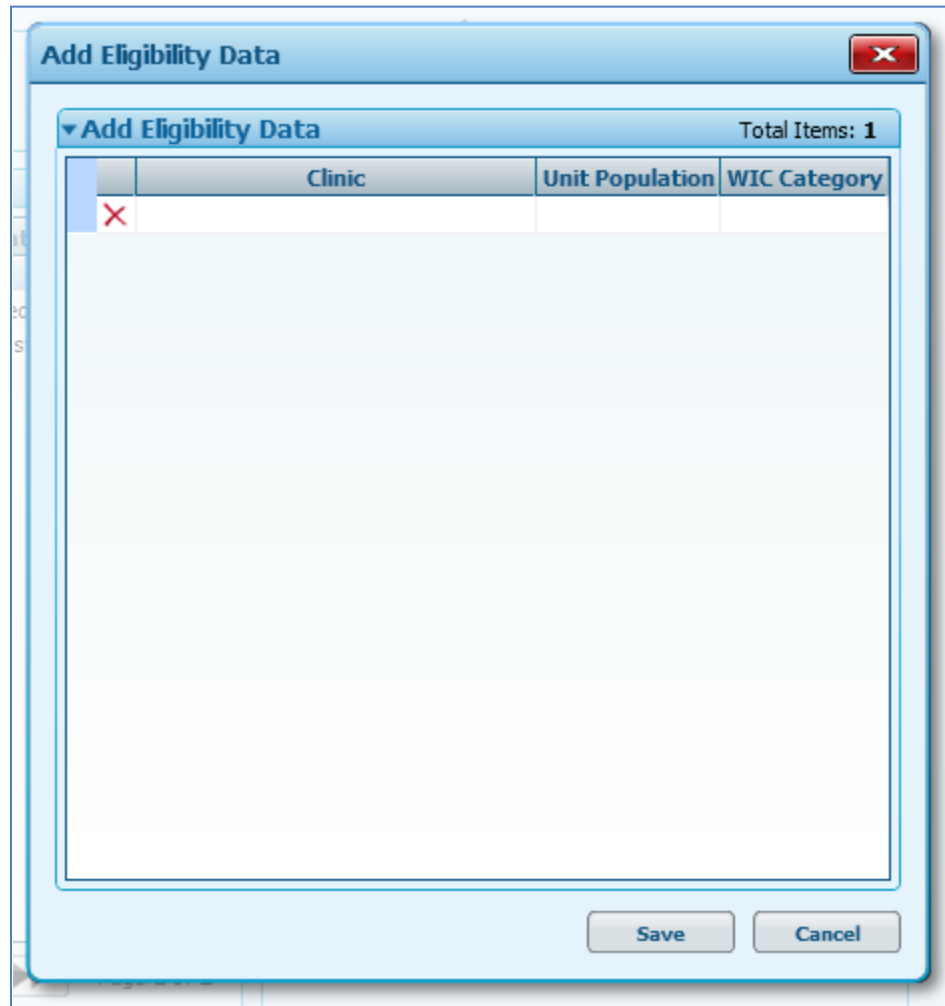
Save **Cancel**

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The Eligibility Data displays in the grid. In this example, in the first row the box outlines the potential eligible population of pregnant women for the Shenandoah Clinic jurisdiction. The details for the data are shown in the Data Set Details group box.

2. If there are several pages of data, you can filter by **Clinic** or **WIC Category**.
3. The **Tracking Date** (date associated with the data), the **Represented Year**, and the **Description** can be edited.
4. The row of data can be deleted by clicking on the **Delete** button () at the left side of the row.
5. To add additional data click **Add Eligibility Data**. The **Add Eligibility Data** screen displays.



Add Eligibility Data

▼ Add Eligibility Data Total Items: 1

	Clinic	Unit Population	WIC Category
			

Save **Cancel**

6. Add data by clicking in the fields and selecting a value or enter the **Unit Population** value directly and hit enter on your keyboard.
7. When all the rows of data are entered select **Save**.

The screenshot shows a software window titled "Add Eligibility Data" with a red close button in the top right corner. Inside the window, there is a section titled "Add Eligibility Data" with a "Total Items: 2" indicator. Below this is a table with three columns: "Clinic", "Unit Population", and "WIC Category". The first row of the table contains the text "Shenandoah Valley Medical System" under "Clinic", the number "20" under "Unit Population", and a dropdown menu under "WIC Category" that is currently set to "Child". The dropdown menu is open, showing a list of options: "Pregnant", "Breastfeeding", "Non-Breastfeeding", "Infant", and "Child". A mouse cursor is pointing at the "Child" option. At the bottom of the window, there are two buttons: "Save" and "Cancel". The "Save" button is highlighted with a red rectangular box.

Clinic	Unit Population	WIC Category
Shenandoah Valley Medical System	20	Child

Save Cancel

Task C. Upload Existing Eligibility Data

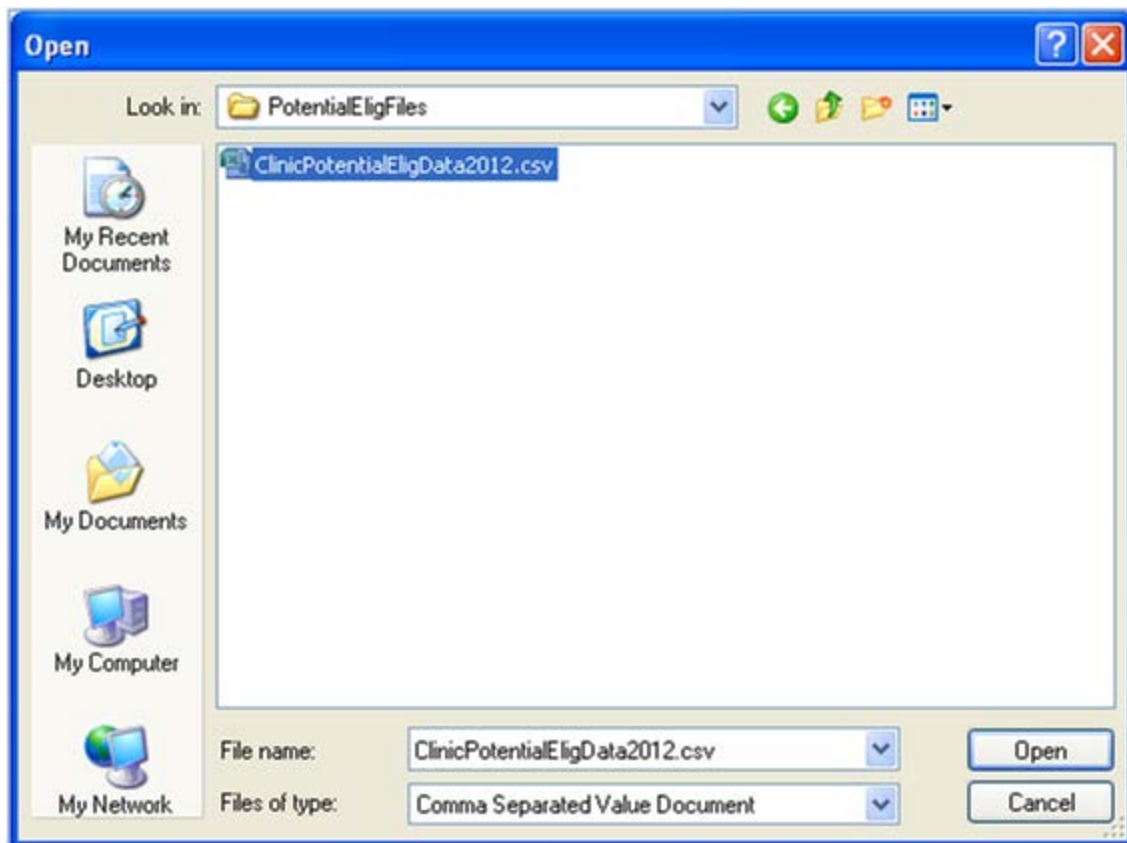
Complete the following steps to perform this task:

1. From the **Home** screen go to **Finance** → **Caseload** → **Manage Eligibility Data**. The **Manage Eligibility Data** screen displays.

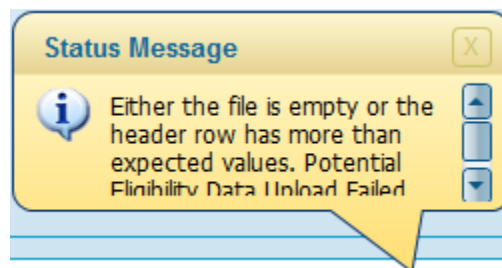


The Update Eligibility screen provides a way to upload an external file of eligibility data. This method uses data not already within the Crossroads database, whereas Task A presented a way to retrieve data sets that reside within the Crossroads database.

2. From the **Manage Eligibility Screen** click **Add Data**. The **Update Eligibility Data** screen displays.
3. In the **Upload File** group box click **Browse**. The **Open** window displays.



4. Select the file to upload and click **Open**. The data set is uploaded to Crossroads. If it fails to load, an error message displays, requiring correction of the data format before it can be loaded.



Task D. Add Eligibility Data Manually

Complete the following steps to perform this task:

1. From the **Home** screen go to **Finance** → **Caseload** → **Manage Eligibility Data**. The **Manage Eligibility Data** screen displays.

The screenshot shows the 'Manage Eligibility Data' screen. At the top, there is a navigation bar with links: Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, and Help. The user is logged in as Frank Rizzo. Below the navigation bar, the main heading is 'Manage Eligibility Data'. Under this heading, there is a section 'Search Existing Potential Eligible Data Sets' with fields for 'Data Level', 'Start Date', and 'End Date', and a 'Search' button. Below the search section is a 'Search Results' table. The table has columns: Data Set Name, Data Set Comments, Date Added, Data Level, Tracking Date, and Year. The table is currently empty. At the bottom of the screen, there is a footer with 'Online | Version 0.34.159.11059 | 50050 | CL2 - Shenandoah Valley Medical System | TAB | 100%'. A red box highlights the 'Add Data' button in the bottom right corner.

Manage Eligibility Data Frank Rizzo Logout

Home Family Services Scheduling Vendor Operations Finance Administration Help

▼ Manage Eligibility Data

Search Existing Potential Eligible Data Sets

Data Level Start Date End Date Search

▼ Search Results Total Items: 0

Data Set Name	Data Set Comments	Date Added	Data Level	Tracking Date	Year
---------------	-------------------	------------	------------	---------------	------

Compare Data Add Data Cancel

Online | Version 0.34.159.11059 | 50050 | CL2 - Shenandoah Valley Medical System | TAB | 100%

2. From the **Manage Eligibility Data** screen click **Add Data**. The **Update Eligibility Data** screen displays.

3. Under **Update Data**, enter a data set name in the **Data Set Name** field.
4. Under **Data Set Details** provide the following:
 - **Tracking Date** (date used to search data)
 - **Represented Year** (year data collected)
 - **Data Level** (Local Agency, State, County, ZIP, ZIP +4, ZCTA, Census Tract)
 - **Description** (data set description)

5. Enter rows of data under the **Eligibility Data** grid. The first column will list the data level selected under **Data Set Details**. Hit enter when a row of data is entered.
6. Continue to enter data rows until complete, then hit a final enter.

Update Eligibility Data Frank Rizzo

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Eligibility Data

Update Data

Data Set Name ★
Clinic Potential Eligible Data 2012

Filter Potential Eligibility Data

Clinic [Dropdown] **WIC Category** [Dropdown] **Filter**

Eligibility Data Total Items: 5

Clinic	Unit Population	WIC Category
Shenandoah Valley Medical System	80	Pregnant
Shenandoah Valley Medical System	75	Breastfeeding
Shenandoah Valley Medical System	65	Non-Breastfeeding
Shenandoah Valley Medical System	90	Infant

Page 1 of 2

Data Set Details

Tracking Date ★ 4/3/2012

Represented Year ★ 2012

Data Level ★ Clinic

Description ★ Potential Eligible for Shenandoah Clinic

Save Cancel

Online | Version 0.34.159.11059 / 50069 CL2 - Shenandoah Valley Medical System TAB 100%



In this example the data set is called Clinic Potential Eligible Data 2012. It uses the Clinic as the data level and data for four WIC categories are shown for the Shenandoah Clinic.

7. When the data entering is complete, click **Save**.

Task E. Compare Eligibility Data

Complete the following steps to perform this task:

1. From the **Manage Eligibility Data** screen search for and select a data set (refer to Task A. Search for a Data Set).

The screenshot shows the 'Manage Eligibility Data' interface. At the top, there is a navigation bar with links: Home, Family Services, Scheduling, Vendor, Operations, Finance, Administration, Help. The user is logged in as Ryan Buysse. Below the navigation bar is a search section titled 'Search Existing Potential Eligible Data Sets' with fields for Data Level, Start Date, and End Date, and a Search button. The search results are displayed in a table with columns: Data Set Name, Data Set Comments, Date Added, Data Level, Tracking Date, and Year. Two results are shown: 'Medicaid Eligibility by Zipcode' and 'Medicaid Estimates by Local Agency'. A red arrow points to the 'Medicaid Estimates by Local Agency' row, and a text box below the table says 'Select a Data Set'. At the bottom left, there is a 'Compare Data' button. At the bottom right, there are 'Add Data' and 'Cancel' buttons. The footer shows 'Online | Version 0.52.201.14855 | 50050 | 1 - Crossroads WIC | TAB | 100%'.

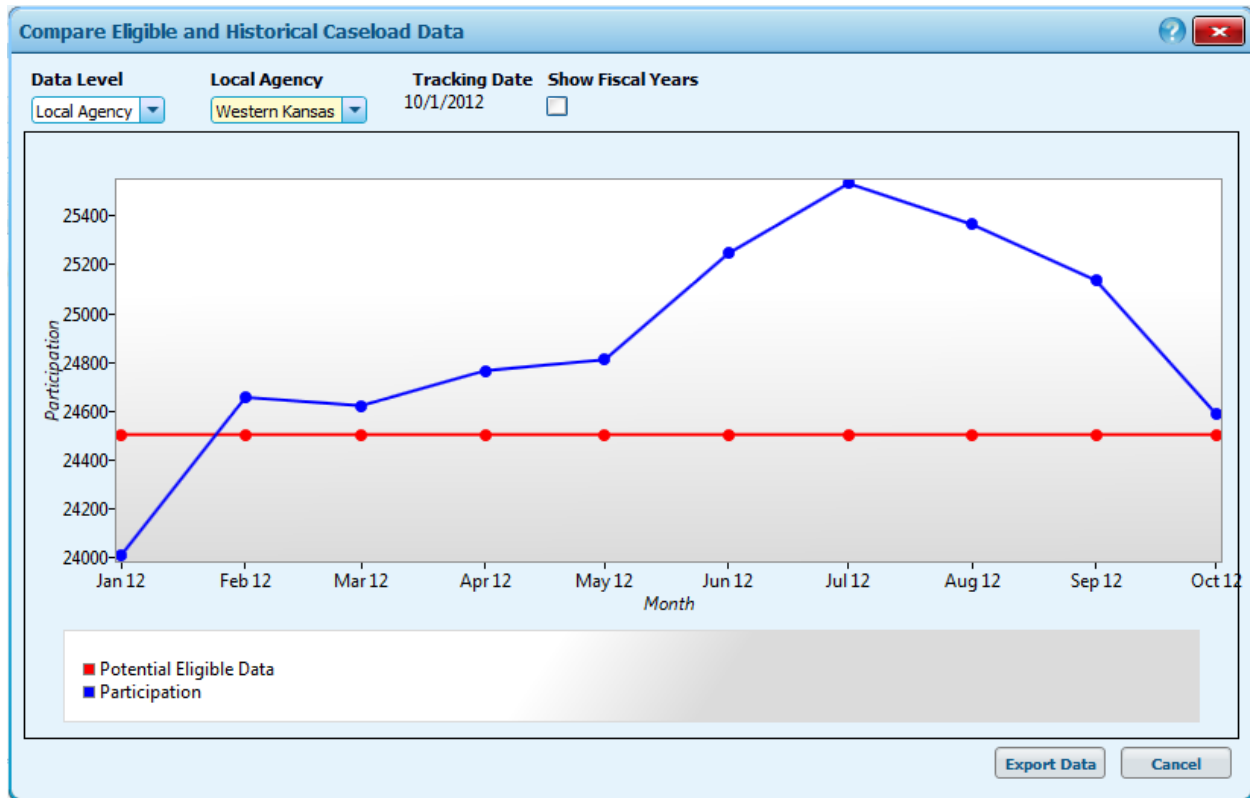
	Data Set Name	Data Set Comments	Date Added	Data Level	Tracking Date	Year
	Medicaid Eligibility by Zipcode	Medicaid Eligibility estimates create by State Proc	1/14/2013	ZIP	1/15/2013	2013
	Medicaid Estimates by Local Agency	Medicaid estimates from state report	2/21/2013	Local Agency	10/1/2012	2012

Select a Data Set

Compare Data Add Data Cancel

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- Click **Compare Data**. The **Compare Eligible and Historical Caseload Data** window displays. The **Potential Eligible** data is compared to the **Participation** data.



- Click **Show Fiscal Years** to display the **Year Selector** if a different year is to be compared.

- To export the **Potential Eligible** data set click on **Export Data**, navigate to the location to save the data and click **Save**. A status message indicates the export was successful.
- Select cancel to return without saving.

Congratulations!

You have successfully completed the **Manage Eligibility Data** process.

6- WAIT LIST AND CASELOAD RESTRICTION LIST CRITERIA

Maintain Caseload Restriction Criteria

A caseload restriction approach to manage maximum caseload is a way to prevent certification of applicants based on their WIC category and/or age group for as long as the restriction is in place. States may choose to place the applicant on a call list so they can be notified if/when the restriction is lifted.

This process includes the following task:

Task A. Creating a Caseload Restriction Definition 6-2

Task A. Creating a Caseload Restriction Definition

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Finance → Caseload → Maintain Caseload Restriction Criteria**. The **Maintain Caseload Restriction Criteria** screen displays, listing any currently defined restriction definitions.

Level	Location	Effective Date	WIC Category	Age Threshold	Active
Clinic	CL12 - POTTAWATOMIE COUNTY WIC PROGRAM	1/8/2013	Child	4 Years, 2 Months, 0 Days	Yes

Include Inactive ☐

Caseload Restriction Definition Cancel

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When a caseload restriction definition is 'deleted', by selecting the red X, it is marked as inactive. To include inactive, or 'deleted' definitions, select the Include Inactive checkbox.

2. To select criteria to define a caseload restriction click **Caseload Restriction Definition**. The **Caseload Restriction Definition** screen displays.

Caseload Restriction Definition Ryan Buysse

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Caseload Restriction Definition

Select Local Agency / Clinic

State: 1 - Crossroads WIC Local Agency: Clinic:

Current Enrollment

Non-Breastfeeding	16277
Child	112135
Breastfeeding	24178
Pregnant	23040
Infant	58723

Caseload Restriction Details

Effective Date: Estimated #: 234353 Category: Age: Year Month Day

Refresh Save Cancel

Online | Version 0.52.201.14855 | 50063 1 - Crossroads WIC TAB 100%



The Caseload Restriction Definition screen initially displays for the entire state, listing the current enrollment of each category in the current enrollment window. This shows the current distribution of participants across categories.

3. To determine the scope of the definition, under **Select Local Agency/Clinic**, select **State**, **Agency**, or **Clinic** as the program level for the caseload restriction definition.
4. Under **Caseload Restriction Details** do the following:
 - Enter the **Effective Date** – The date the caseload restriction becomes effective.
 - Select the **Category** – This determines the category to be restricted. Note that all categories listed above that category in the Current Enrollment window will also be included in the restriction. (i.e. if the restriction is defined at the Child level, all participants in the Non-Breastfeeding category would also be included). The categories are listed in ascending order of priority.
 - Enter the **Age** – Enter the age by **Year**, **Month**, and **Day** of children that would be caseload restricted. Entering a specific age range is optional.
5. Click **Refresh**. The Estimated # field and Current Enrollment window are updated with the number of participants the system estimates would be affected by this caseload restriction. If an **Age** was specified, each category can be expanded to show the estimated participants in the specified age range.

Caseload Restriction Definition Ryan Buysse

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Caseload Restriction Definition

Select Local Agency / Clinic

State: 1 - Crossroads WIC Local Agency: Clinic:

Current Enrollment

- Non-Breastfeeding 16277
- Child 112135
 - Age >= 3 Years, 0 Months, 0 Days 76853
 - Age < 3 Years, 0 Months, 0 Days 35282
- Breastfeeding 24178
- Pregnant 23040
- Infant 58723

Caseload Restriction Details

Effective Date: 2/25/2013 Estimated #: 93130 Category: Child Age: Year: 3 Month: Day:

Refresh Save Cancel

Online | Version 0.52.201.14855 | 50063 1 - Crossroads WIC TAB 100%

6. Caseload Restriction Details can be changed and the screen refreshed until the desired **Estimated #** is achieved.
7. When the definition is set, click **Save**. A status message indicates the caseload restriction criteria were saved.



The definition above shows the state is the target of the caseload definition. The caseload restriction has an effective date of February 25, 2013, includes children, aged three and older, and non-breastfeeding women.

Congratulations!

You have successfully completed the **Maintain Caseload Restriction Criteria** process.

Maintain Wait List Criteria

The establishment of a wait list is a way to manage caseload when a WIC program has reached a maximum caseload. Crossroads allows a wait list to be defined for the state, agency or clinic. Applicants belonging to the affected WIC defined wait list criteria as a result of passing through the certification process are put on the wait list instead of issued benefits.

This process includes the following tasks:

- Task A. Configuring the Wait List Criteria Settings 6-7**
- Task B. Creating the Wait List Definition 6-9**

Task A. Configuring the Wait List Criteria Settings

Complete the following steps to perform this task:

1. From the **Home** screen, go to **Finance → Caseload → Maintain Wait List Criteria**. The **Maintain Wait List Criteria** screen displays, listing any wait list definitions.

Maintain Wait List Criteria Ryan Buysse

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Level	Location	Effective Date	Priority	WIC Category	Risk Score	Active
CL14 - JACKSON COUNTY WIC PROGRAM		1/21/2013	V	Child	Yes	Yes
CL13 - OSAGE COUNTY WIC PROGRAM		1/8/2013	V	Non-Breastfeeding	Yes	Yes

Task A: Include Inactive ☐

Task B: Waiting List Definition

Settings

Online | Version 0.52.201.14855 | 50057 1 - Crossroads WIC TAB 100%



When a Wait List definition is 'deleted', by selecting the red X, it is marked as inactive. To include inactive, or 'deleted' definitions, select the Include Inactive checkbox.

2. Click **Settings**. The **Waiting List Criteria Settings** pop-up window displays.

Waiting List Criteria Settings

Active	Ranking	
<input checked="" type="checkbox"/>	1	Priority
<input checked="" type="checkbox"/>	2	Participant Category
<input type="checkbox"/>		Risk Score
<input checked="" type="checkbox"/>	3	Age
<input type="checkbox"/>		High Risk

Save Cancel

3. Under the **Active** column, check the boxes for the criteria categories that will apply to the wait list criteria.
4. For each **Active** box checked, assign a **Ranking** with the highest rank as 1.



In this example, Priority is selected to be ranked first, Participant Category 2nd, and Age 3rd. This means the priority status of a participant will be the first determinant of whether the participant is put on the wait list, etc.

5. Click **Save**. The waiting list criteria settings are now established.

Task B. Creating the Wait List Definition

Complete the following steps to perform this task:

1. After the waiting list criteria settings are established, click **Waiting List Definition**. The **Wait List Definition** screen displays.
2. Determine the scope of the wait list by selecting **State**, **Local Agency**, or **Clinic**.
3. To establish a wait list definition do the following (based on settings from Task A):
 - Enter the **Effective Date** – The date the wait list becomes effective.
 - Select the **Priority** level criteria – Participants with this priority and lower priorities will be put on the wait list.
 - Select the **Category** – This applies only to the **Priority** selected.
 - Enter the **Age** – Enter the age by **Year**, **Month**, and **Day** of children that would be put on the wait list if they are older than the age stated.
4. After the scope of the wait list is selected, click **Refresh**. The numbers of current enrollment for each of the criteria ranked as #1 are displayed in the **Current Enrollment** window.



The numbers of currently enrolled can be used to determine how to define the wait list criteria. If an agency manager determined that the agency was a certain number of enrollees over their maximum caseload, they could make a determination of where to set the wait list criteria to adjust their caseload to approximately match their maximum caseload.

Wait List Definition Ryan Buysse

Home Family Services Scheduling Vendor Operations Finance Administration Help Logout

Define Waiting List

Select Local Agency / Clinic

State: 1 - Crossroads WIC Local Agency: LA2 - Wichita Area Clinic: [Dropdown]

Current Enrollment

Priority VI	1
Priority V	8830
Non-Breastfeeding	0
Child	8830
Priority IV	7064
Non-Breastfeeding	1766
Breastfeeding	1766
Pregnant	1766
Infant	1766
Priority III	22958
Priority II	3532
Priority I	15895

Waiting List Details

Effective Date: 2/25/2013 Estimated #: 1766 Priority: IV Category: Non-Breastfeeding Age: Year: Month: Day:

Settings Refresh Save Cancel

Online | Version 0.52.201.14855 | 50063 1 - Crossroads WIC **TAB** 100%



The definition above is based on the selection and rankings of the criteria as defined in Task A. It would look different if different criteria or rankings were selected in Task A.

5. Waiting List Details can be changed and the enrollment data refreshed until the desired **Estimated #** is reached.
6. Click **Save**. A status message indicates the wait list criteria were saved.

Congratulations!

You have successfully completed the **Maintain Wait List Criteria** process.

Task C. Submitting the TIP Report to Food and Nutrition Service (FNS)

Complete the following steps to perform this task:

1. While still on the **Vendor TIP Report** screen, select the file to be submitted by clicking on the row in the **TIP Report Results** grid.

The screenshot shows the 'Vendor TIP Report' interface for user FRANK RIZZO. The 'Generate Vendor TIP Report' section has the 'Federal Fiscal Year' set to 2013. Below this is a table titled 'TIP Report Results' with 63 total items. The table has columns for Federal Fiscal Year, File Name, Exported, Imported, Status, Submitted By, Submitted On, and Generated Date. The last row in the table is selected, showing a file named '2013_TIP.csv' with a status of 'Unsubmitted'.

Federal Fiscal Year	File Name	Exported	Imported	Status	Submitted By	Submitted On	Generated Date
2012	2012_1119aTIP.csv	Yes		Unsubmitted			11/19/2012 2:41:26 PM
2012	2012_1120_TIP.csv	Yes		Submitted			11/20/2012 10:25:44 AM
2012	2012_11_29_TIP.csv	Yes		Submitted			11/29/2012 8:04:56 AM
2012	2012_12_11_TIP.csv	Yes		Unsubmitted			12/11/2012 10:04:15 AM
2012	2012_12_11a_TIP.csv	Yes		Unsubmitted			12/11/2012 10:28:24 AM
2012	2012_12_11a_TIP.csv	Yes		Unsubmitted			12/11/2012 10:53:48 AM
2012	2012_12_11a_TIP.csv	Yes		Unsubmitted			12/11/2012 11:59:32 AM
2012	2012_12_11b_TIP.csv	Yes		Unsubmitted			12/11/2012 12:48:16 PM
2012	2012_12_17_TIP.csv	Yes		Unsubmitted			12/17/2012 2:19:06 PM
2012	2012_12_17_TIP.csv	Yes		Unsubmitted			12/17/2012 2:30:43 PM
2012	2012_12_17_TIP.csv	Yes		Unsubmitted			12/17/2012 2:37:38 PM
2012	2012_12_19_TIP.csv	Yes		Unsubmitted			12/19/2012 12:39:28 PM
2012	2012_12_19_TIP.csv	Yes		Unsubmitted			12/19/2012 12:53:15 PM
2012	_TIP.csv	Yes		Unsubmitted			12/19/2012 2:55:08 PM
2013	2013m_TIP.csv	Yes		Unsubmitted			1/11/2013 12:00:15 PM
2013	2013_TIP.csv	Yes		Unsubmitted			1/14/2013 2:57:45 PM
2012	2012a_TIP.csv	Yes		Unsubmitted			1/17/2013 9:15:15 AM
2012	2012_9_TIP.csv	Yes		Unsubmitted			1/28/2013 1:07:07 PM
2012	2012_9a_TIP.csv	Yes		Unsubmitted			1/29/2013 11:01:13 AM
2013	2013c_TIP.csv	Yes		Unsubmitted			1/29/2013 1:37:26 PM
2012	2012b_TIP.csv	Yes		Unsubmitted			1/29/2013 1:39:52 PM
2013	2013_TIP.csv	Yes		Unsubmitted			1/30/2013 9:04:27 AM
2013	2013a_TIP.csv	Yes		Unsubmitted			1/30/2013 10:31:52 AM
2013	2013_TIP.csv	Yes		Unsubmitted			1/31/2013 8:49:35 AM
2013	2013_TIP.csv		Yes	Unsubmitted			1/31/2013 8:59:50 AM

At the bottom of the screen, there are buttons for 'Import', 'Export', 'Generate FNS TIP File', and 'Cancel'. The status bar shows 'Mission - MISSION CLINIC' and a progress indicator at 100%.

2. Click **Generate FNS TIP File**. A standard Windows Create File screen displays. The file is saved as a TXT file.
3. Click **Save**. A success message displays and the **Status** column displays a status of **Submitted**.

Congratulations!

You have successfully completed the **Manage TIP Report** process.

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