

## MyNCWIC Participant Portal Guide for NC WIC Staff

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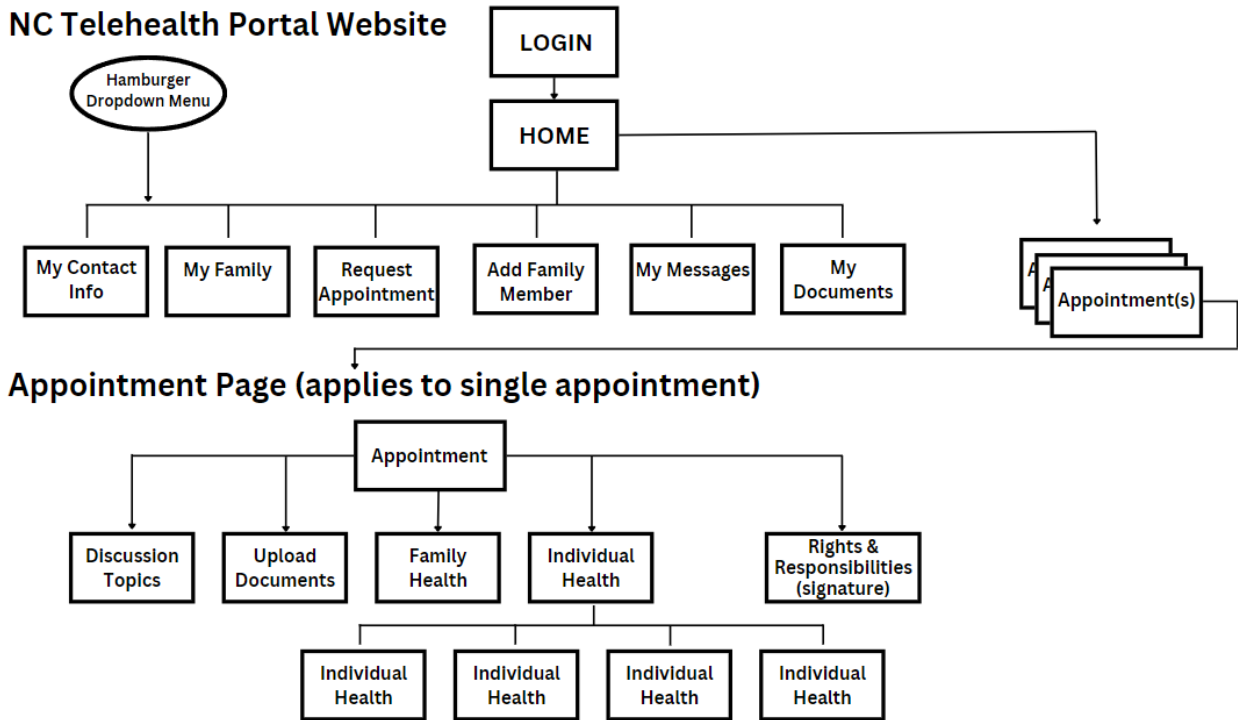
The Community Nutrition Services Section (CNSS) has developed **MyNCWIC**, a participant-facing web portal solution that interfaces seamlessly with Crossroads, for streamlining the WIC certification process and gathering client assessment information prior to appointments. This Participant Portal Guide provides an overview of the portal so that staff can familiarize themselves with its functionality and assist participants as needed.

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General Overview

The following diagram shows the navigational flow of the MyNCWIC website.



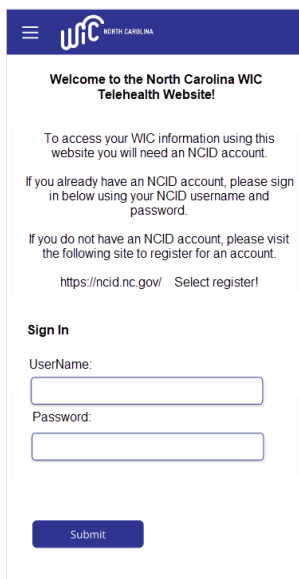
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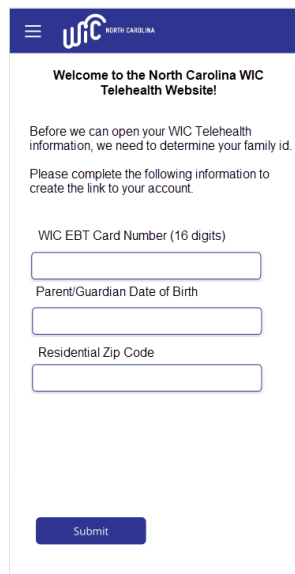
## Logging In and Navigational Menu

### Login Screen

**MyNCWIC** uses NCID as its secure authentication solution. Issuance of the NCID username and password maintenance will be handled by the NCID system. Prior to using the **MyNCWIC**, the user/parent/guardian will need to set up their NCID. The first time a user signs into the Telehealth portal, the login screen will ask the user to provide information necessary to locate their WIC family record. If they successfully provide this information, the portal will 'link' their NCID username to their WIC Family ID in Crossroads. The first screenshot is an example of how the login screen will appear. The second screenshot shows if the NCID has not been linked to a WIC family.



The screenshot shows the 'Welcome to the North Carolina WIC Telehealth Website!' header. Below the header, there is a message: 'To access your WIC information using this website you will need an NCID account.' This is followed by instructions for users who already have an NCID account: 'If you already have an NCID account, please sign in below using your NCID username and password.' For users without an NCID account, it says: 'If you do not have an NCID account, please visit the following site to register for an account. https://ncid.nc.gov/ Select register!'. There is a 'Sign In' section with two input fields: 'UserName:' and 'Password:'. A blue 'Submit' button is at the bottom.



The screenshot shows the 'Welcome to the North Carolina WIC Telehealth Website!' header. Below the header, there is a message: 'Before we can open your WIC Telehealth information, we need to determine your family id. Please complete the following information to create the link to your account.' There are three input fields: 'WIC EBT Card Number (16 digits)', 'Parent/Guardian Date of Birth', and 'Residential Zip Code'. A blue 'Submit' button is at the bottom.

When the user selects the 'Submit' button, the system will search for the family and create the record that links the NCID username to the WIC family id.

After the user has successfully logged in, the home page will display.

- For more information about registering for NCID and linking the NCID to the Family ID on **MyNCWIC** see the resource [Signing up for the MyNCWIC Portal: Summary for Staff](#).

## Navigational Menu

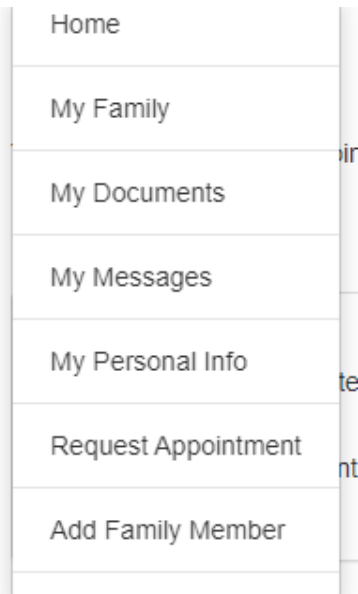
On every page of **MyNCWIC** there is a hamburger dropdown menu on each screen which allows the user to go directly to non-appointment specific screens.



Home

The dropdown menu will display as shown below and have the options of:

- Home
- My Family
- My Documents
- My Messages
- My Personal Info
- Request Appointment
- Add Family Member



Two icons on the home page represent My Messages and My Documents. Selecting either of these options will open the corresponding portal page.



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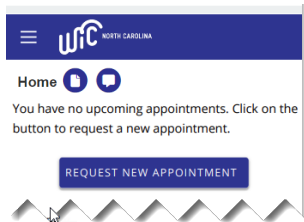
## Home Screen

The Home screen will contain areas for:

- My upcoming appointments
- A button to request a new appointment
- My Family 'card'
- A button to add a new family member

## My Upcoming Appointments section of Home Page

If the family has no upcoming appointments currently scheduled, the My Upcoming Appointments section will display the statement "You have no upcoming appointments. Click on the button to request a new appointment" as shown below.

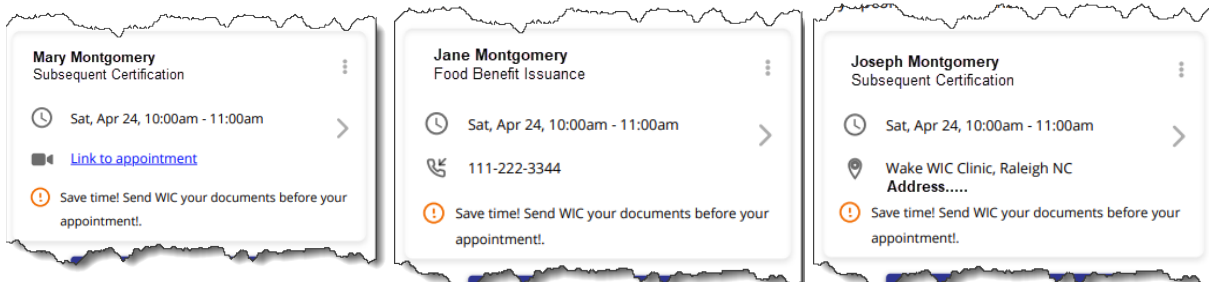


If the family has upcoming appointments, each appointment will have a separate "card" with:

- Participant Name
- Appointment Type
- Date and Time of Appointment
- Method of Appointment
- 3 vertical ellipses with a drop down selection to Cancel/Reschedule the appointment
- Right Arrow leading to Preparing for Appointment screens
- A message indicating if there is still data to be collected for the appointment.  
"Save time! Send WIC your documents before your appointment!"

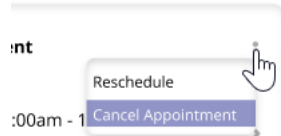
## Method of Appointment

- If the method of appointment is video conference, it will list a link to the Google Meet appointment. The link is active within 15 minutes before the appointment time.
- If the method of appointment is telephone, it will list the telephone number of the clinic
- If the method of appointment is onsite at the clinic, it will list the clinic address

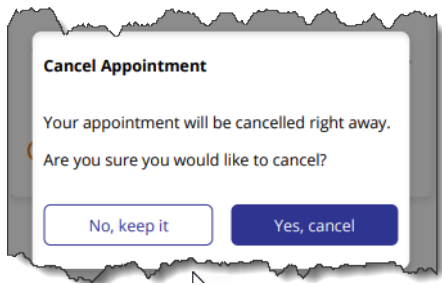


### Reschedule or Cancel Appointment

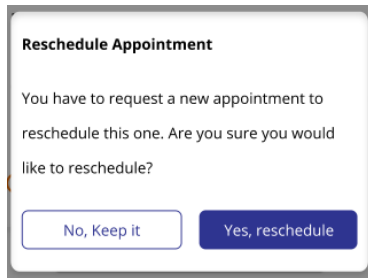
The 3 vertical ellipses will open a drop down selection:



If Cancel Appointment is selected, the following popup will appear to confirm the cancellation request. If the user selects “No, keep it” no action is taken and the popup closes. If the user selected “Yes, cancel” the cancellation is confirmed.



If Reschedule is selected, the following popup will appear to confirm the reschedule request. If the user selects “No, keep it” no action is taken and the popup closes. If the user selects “Yes, cancel” the user is directed to the Request New Appointment functionality.

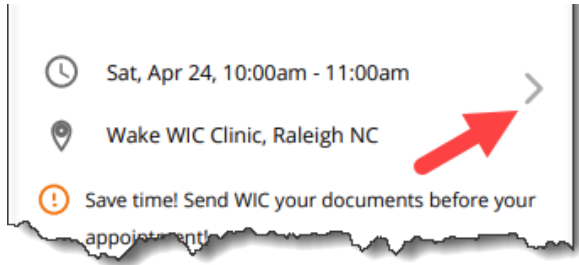


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### Right Arrow leading to Preparing for Appointment Screens

Selecting the right arrow in the appointment box will open that appointment for preparation.



This is the 'tracker' page for this appointment. It will show who the appointment is for and the type of appointment and will track the main areas of preparation for the appointment:

- Upload Document
- Health Questions
- Rights & Responsibilities (signature)

The status of each section will be shown as "Not Started", "In Progress", and "Complete", as shown below.

## < Octavia October

### Subsequent Certification

🕒 Friday, 24 February 2023  
08:30 AM - 09:00 AM

📺 [Open Google Meet Appointment](#)

📌 Save time! Send WIC your documents before appointment.

### Please complete the following steps

**Upload Documents**  
NOT STARTED

**Discussion Topics**  
NOT STARTED

**Family Health Questions**  
NOT STARTED

**Individual Health Questions**  
IN PROGRESS

**Rights and Responsibilities**  
(signature)  
NOT STARTED

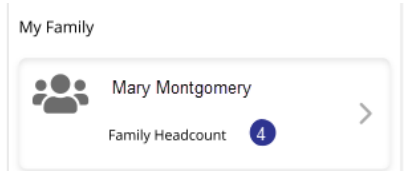
For more information about preparing for appointments, see page 13.

### My Family Card on the Home Screen

The My Family section will display the Parent/Guardian Name and a Family Headcount listing the number of certified participants in the family. Note that the Parent/Guardian may or may not be a participant. Selecting the right arrow in the My Family box will open the My Family screen. For more information about the My Family Screen see page 9.



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## Request New Appointment Button

The home screen will contain a button for “REQUEST NEW APPOINTMENT”. When this button is selected, a screen will open to gather information to be used by the clinic staff to schedule an appointment with the participant.



**MyNCWIC Portal** LogOut

**< New Appointment**

When would you like this appointment?

- Within this week
- Within this month
- Schedule for next month

What kind of appointment would you like?

- Telephone
- TeleWIC/Video
- In the agency

Have you moved since your last appointment?

- Yes, within my county
- Yes, to a new county in North Carolina
- Yes, to a new state
- No, I have not moved.

What is your preferred day(s) of the week?

- Monday
- Tuesday
- Wednesday
- Thursday
- Friday
- Saturday

What time of day would you like your appointment?

- Early morning 8:00AM - 10:00AM
- Late morning 10:00AM - 12:00 Noon
- Early afternoon Noon - 2:00PM
- Late afternoon 2:00PM - 5:00PM

**Submit**

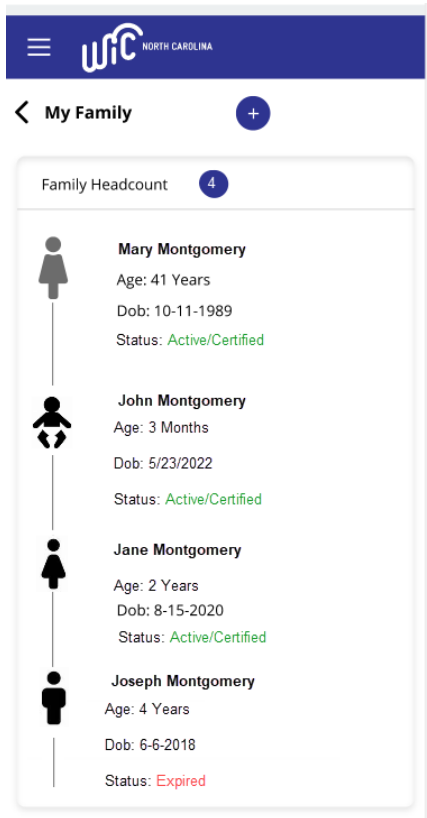
Cancel

## My Family Screen and Add Family Member

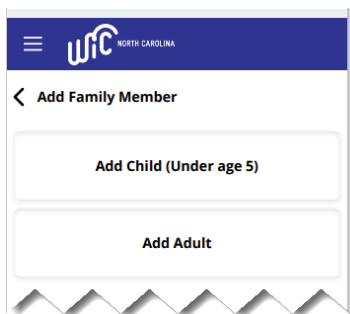
The My Family screen lists all family members, as shown below. Each Family member is shown with their name, age, date of birth, and current status in the WIC program.

The “Plus” at the top of the screen will open the Add Family Member as described below.

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When the Add Family Member is selected on the Home screen or the plus sign is selected on the My Family screen, the following screen will open to gather information to be used by the clinic staff to add a new participant to the family. Note that this new participant will not be served in the current appointment.



There are 2 different screens to add a family member, one for adding an adult and one for adding a child.

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The screenshot shows the 'Add Family Member' form for an adult. At the top, there is a blue header with the WIC North Carolina logo and a hamburger menu icon. Below the header, the title 'Add Family Member' is followed by a back arrow. The section is titled 'Add Adult'. A blue checkmark icon is next to the text: 'Adding an adult allows that individual to bring children in for appointments and change/pick up their WIC benefits.' Below this, there are three input fields: 'First Name', 'Last Name', and 'Date of Birth'. The 'Date of Birth' field has a calendar icon. At the bottom, there is a checkbox labeled 'This person will participate in the WIC Program.' and two buttons: 'Save' and 'Cancel'.

The screenshot shows the 'Add Family Member' form for a child. At the top, there is a blue header with the WIC North Carolina logo and a hamburger menu icon. Below the header, the title 'Add Family Member' is followed by a back arrow. The section is titled 'Add Child (under age 5)'. Below this, there are three input fields: 'First Name', 'Last Name', and 'Date of Birth'. The 'Date of Birth' field has a calendar icon. At the bottom, there are two buttons: 'Save' and 'Cancel'.

If the family member being added is a participant (checkbox is marked), there is an additional question to be asked to determine the category of the participant.

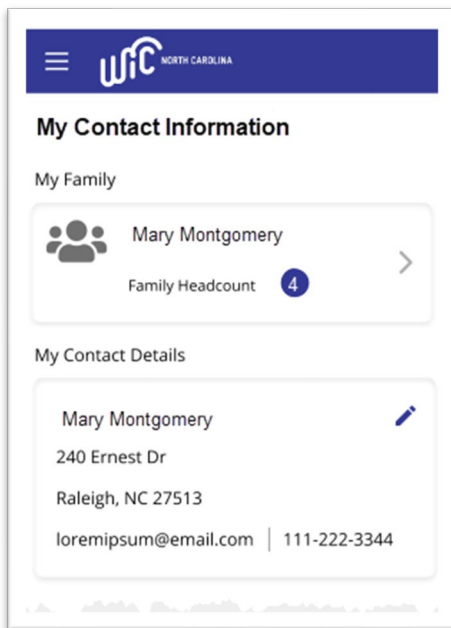
The screenshot shows a dialog box titled 'Participant Status' with a close button (X) in the top right corner. The text inside reads: 'The WIC program serves adult women who are pregnant, non-breastfeeding and/or breastfeeding. Which of these applies to the new family member?' Below this, it says 'The new family member is:' followed by four radio button options: 'Pregnant', 'Non-breastfeeding (up to 6 months after end of pregnancy)', 'Breastfeeding (infant up to 1 year old)', and 'Pregnant and breastfeeding (infant up to 1 year old)'. At the bottom, there are two buttons: 'Select' and 'Cancel'.

On the Add Child screen there will be a validation on the Date of Birth to verify the child is less than 5 years old.

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## My Contact Information Screen

The My Contact Information screen provides the opportunity to update the parent/guardian information and address of the family. Screen examples are shown below. Selecting the pencil icon will open the Contact Details edit area. Note that this is the Parent/Guardian information. The parent/guardian may or may not be a participant.



The screenshot shows the 'My Contact Details' edit form. It includes a 'CANCEL' button and a 'SAVE' button at the top right. The form fields are: 'First Name' (Mary), 'Last Name' (Montgomery), 'Street Address Line 1' (Raleigh, NC 27513), 'Street Address Line 2' (empty), 'City' (Raleigh), 'State' (North Carolina), 'Zip' (27513), 'Email Address' (loremipsum@email.com) with a checkbox for 'Yes, I prefer emails', and 'Phone Number' (111-222-3344) with a checkbox for 'Yes, I accept text messages'.

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### Pre-Preparation for Appointments

Appointments in Crossroads have dynamic information requirements, based on the participant category and the type of appointment. **MyNCWIC** will support the pre-appointment preparation for all participant categories and the following types of appointments:

- Nutrition Education/Food Benefit Issuance appointments
- Mid-Certification Assessment appointments
- Subsequent Certification appointments for existing participants.
- Certification of new family members.

Note: **MyNCWIC** will not support the creation of a new family but will support the addition of a new participant to an existing family.

**MyNCWIC** will provide a combination of information verification (display what is currently recorded in Crossroads and ask for any updates), open questions in various formats (yes/no, multiple choice, open text), and the ability to upload document images normally provided and reviewed or scanned during an in-office appointment. **MyNCWIC** will also provide the functionality to capture an electronic signature from the participant to satisfy the signature requirements that exist in Crossroads and are currently captured via a signature pad.

Pre-preparation for an appointment is divided into separate sections, aligned with the screens within Crossroads. These sections include:

- What would you like to discuss?
- Family Health Information
- Individual Health Information
- Upload Documents
- Rights & Responsibilities

### Family Health

The questions for Family Health on **MyNCWIC** correspond to the questions on the Family Assessment Quick Link screen in Crossroads.

### Individual Health

Health information for the individual is divided into 4 sections. The Health Questions will be presented separately for each family member who is scheduled for an appointment. The appointment that was opened to reach these screens will determine which family member the questions refer to. The family member's name will be displayed in the header of the screens.

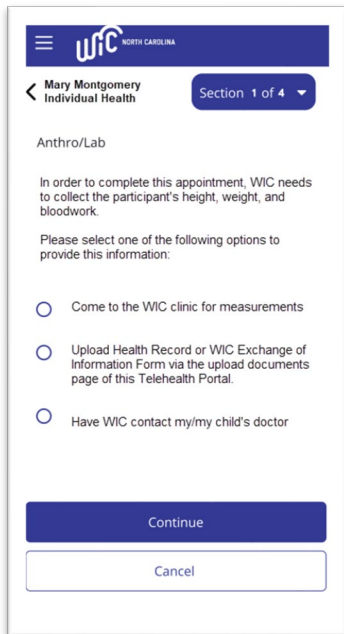
Note: Questions are based on the participant's category and age (for infants and children) and will vary from the following examples.

The 4 sections of Individual Health are:

- Data/Labs
- Individual Health
- Diet/Health
- Family Life

### Data/Labs for the Individual

MyNCWIC presents the user with several options to provide anthropometric and lab measurements.



The screenshot shows a mobile application interface for 'wfc NORTH CAROLINA'. The user is 'Mary Montgomery' and is in the 'Individual Health' section, which is 'Section 1 of 4'. The section is titled 'Anthro/Lab'. The text explains that WIC needs to collect the participant's height, weight, and bloodwork. It asks the user to select one of three options to provide this information:

- Come to the WIC clinic for measurements
- Upload Health Record or WIC Exchange of Information Form via the upload documents page of this Telehealth Portal.
- Have WIC contact my/my child's doctor

At the bottom, there are two buttons: a blue 'Continue' button and a white 'Cancel' button with a blue border.

### Individual Health

The questions for Individual Health on **MyNCWIC** correspond to the questions on the Health Information Quick Link screen in Crossroads.

### Diet/Health for the Individual

The questions for Diet/Health on **MyNCWIC** correspond to the questions on the Dietary & Health Quick Link screen in Crossroads.

### Family Life

The questions for Family Life on **MyNCWIC** correspond to the questions on the Ecosocial Quick Link screen in Crossroads.

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### What would you like to discuss?

The portal will give the participant an opportunity to tell the clinic staff what they would like to discuss during their appointment. Current choices include:

#### Pregnant

Recommended weight gain  
Pregnancy-related conditions  
WIC food package  
Other/open ended

#### Postpartum

“Fourth trimester” / taking care of myself  
Post-pregnancy body changes  
WIC food package  
Other/open ended

#### Child

How my child is growing  
Appropriate foods for my child’s age  
Child eating behaviors  
WIC food package  
Other/open ended

#### Infant

How my baby is growing  
Appropriate foods for my baby’s age  
Infant feeding behaviors  
WIC food package  
Other/open ended

The free-form text box will be available for the participant to enter any discussion topics.

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### Upload Documents

**MyNCWIC** will list the documents needed for the appointment(s) schedule and will track which have been uploaded and which are still pending. The documents needed are based on the appointment type as shown in the table below.

+	Proof of Identification	Proof of Residence	Proof of Income	Ht/Wt/Blood work form from Dr	Food/Formula Rx	Other
<b>Appointment Type</b>						
Breastfeeding	N/A	N/A	N/A	N/A	N/A	Optional
Food Benefit Issuance	N/A	N/A	N/A	N/A	Optional	Optional
High Risk Follow-up	N/A	N/A	N/A	Optional	Optional	Optional
Initial Certification	Required	Required	Required	Required	Optional	Optional
Low Risk Follow-up	N/A	N/A	N/A	Optional	Optional	Optional
Mid-Certification Assessment	N/A	N/A	N/A	Required	Optional	Optional
Nutrition Education - Individual	N/A	N/A	N/A	N/A	N/A	Optional
Subsequent Certification	Required	Required	Required	Required	Optional	Optional
Walk-In	N/A	N/A	N/A	N/A	N/A	N/A

A document can be uploaded or the participant can take a photo of any documents using their camera and then upload the photo via the Upload Documents functionality. For security and storage reasons, uploaded documents will not be viewable through **MyNCWIC**. Because **MyNCWIC** is not a true mobile application, but instead is a mobile-accessible website, the portal is not able to control or access the camera directly.

When a document is required but has not yet been uploaded, “Pending” appears next to the document type in the list. When a document has been uploaded, “Pending” changes to “Complete.” If a document is not required, “Optional” appears when no document has been uploaded and “Complete” after a document has been uploaded.

### Rights & Responsibilities (Signatures)

The Rights and Responsibilities screen will present the rights and responsibilities verbiage from Crossroads and allow the participant to provide an electronic signature. Because **MyNCWIC** is not a true mobile application, the ability to capture a free-form signature on a touch screen is not possible. **MyNCWIC** uses an e-signature protocol and captures an electronic signature by displaying an “I accept” checkbox with the following statement:

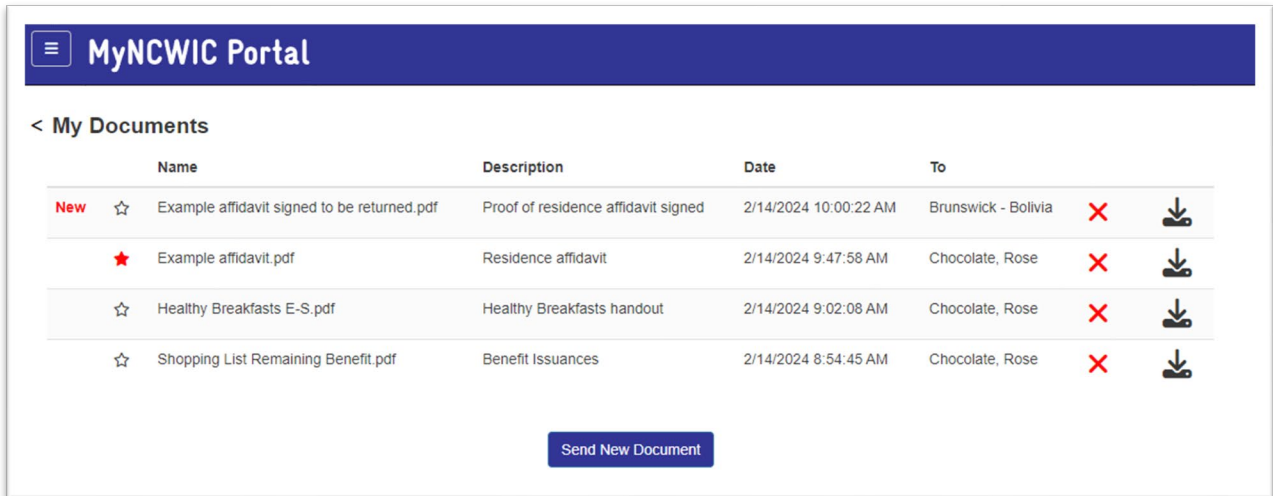
“By selecting the "I Accept" button, you are signing this Agreement electronically. You agree your electronic signature is the legal equivalent of your manual/handwritten signature on this Agreement.”



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## My Documents

The My Documents screen allows the user to read documents sent from the WIC clinic and/or send documents to the WIC clinic.



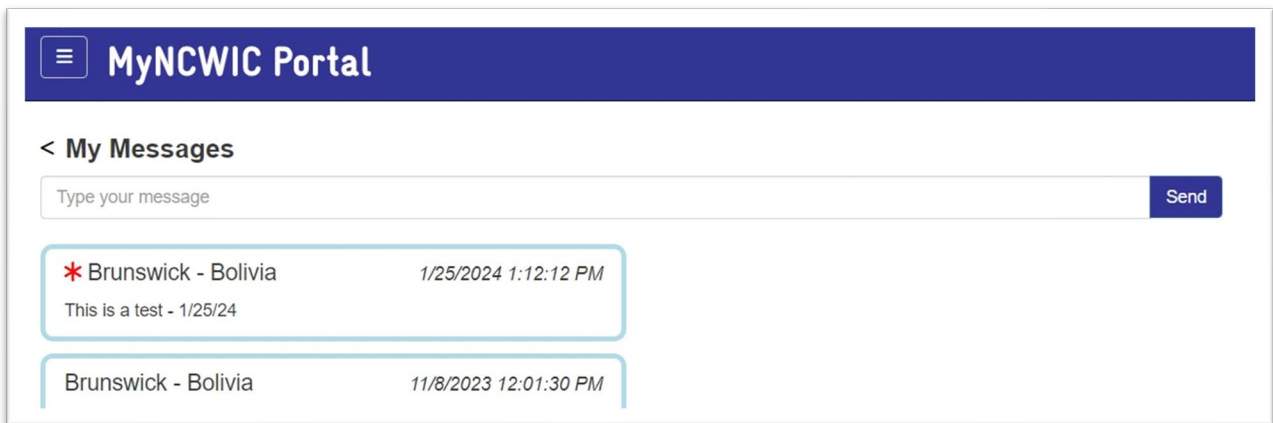
- Documents are displayed in date order of newest to oldest.
- The “New!” icon indicates items not yet opened.
- The “Star” is a way for the participant to mark important items (toggle on and off)
- Clicking on the Description will open the image in a new window
- Date is the date the message or file was saved in the portal
- Description helps identify the document without having to open and view it.
- Delete allows the participant to delete old messages and files.

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### My Messages

The My Messages screen allows the user to read messages sent from the WIC clinic and/or send messages to the WIC clinic. This communication functionality is not “real-time” or “instant,” nor will it provide alerts (email or text) to the participant when a new communication is sent by the clinic staff. The participant will need to open the portal to see the My Messages icon and view the communication.



The screenshot shows the MyNCWIC Portal interface. At the top is a dark blue header with a hamburger menu icon and the text "MyNCWIC Portal". Below the header is a section titled "< My Messages". Underneath this title is a text input field with the placeholder text "Type your message" and a blue "Send" button to its right. Below the input field are two message cards. The first card is highlighted with a light blue border and contains a red asterisk icon, the text "Brunswick - Bolivia", and the timestamp "1/25/2024 1:12:12 PM". Below this is the message content "This is a test - 1/25/24". The second card is also highlighted with a light blue border and contains the text "Brunswick - Bolivia" and the timestamp "11/8/2023 12:01:30 PM".

- Messages will be displayed by date of order created, from the top down.
- Date is the date the message was created.
- Messages to the participant from the clinic will be on the left side and messages to the clinic from the participant will be on the right side.
- The text box will be at the top for the participant to enter a new text message.