

Copying Income to Current Script

Introduction

This HuBERT on-demand training module...

Intro1

... is provided by the MN Department of Health WIC Program. It provides an overview of how to copy a previous income to current in HuBERT.

Documenting Income Overview

Overview

We are required to document income as part of the certification process.

Income should be entered into the Certification Guided Script, or CGS, on the date the participant is seen for their certification.

Detailed information about how to assess income is provided in MOM, Section 5.2.4.

SOD

As part of the Federal Separation of Duties (SOD) policy, income eligibility cannot be determined by the same staff person who determines medical or nutrition risk, and how this separation of duties occurs must be auditable within HuBERT.

The documentation process if income is assessed prior to the certification is dependent on our agency's SOD Plan. These modules will not review SOD. They will focus on how to enter income information into HuBERT to meet the certification requirement.

Further information about Separation of Duties is available in MOM, Section 1.18.

Assessing Income

When assessing income, in general, we should...

first verify whether there is a previous income determination within the past 92 days that we could use and copy to current; next we should check for participation in an adjunctive program. If neither of those apply, we can do a traditional income screening and enter their income based on information provided by the participant.

In this module, we'll look at copying a previous income to the current income record.

Transition Slide

<display>Transitions from overview slide to Participant List screen.

Scenario

Today is March 25th.

Will Power was certified on December 26th.

His mom, Lotta, is being certified today as a Pregnant woman. Double-click on Lotta's row to open her participant folder.

<no audio> Double-click on Lotta's row to open her Participant Folder.

Cursor

<cursor spins>

Open Hx Tab

Go ahead and click on the Income History tab.

<no audio> Click on the **Income History Tab**.

Previous Contacts

Previously documented income contacts for the household are available for review in the Income History tab, including the date, the amount, the income proof and the household size.

Adding Contacts

Income contacts are usually entered into the Certification Guided Script.

However, if proof of income can't be provided at the time of the cert, we may need to enter income into the Participant Folder at a subsequent nutrition visit.

The ability to add an income screening contact in the Participant Folder is disabled if a participant, like Lotta, is not in a current certification period.

Let's open the CGS. Go ahead.

<no audio – failure hint> Click the Certification Guided Script icon (blue certificate).

Category Msg

<no audio> Click the **Yes** button or press the Enter key.

Open Demo

The Income Contact is found within Demographics. Go ahead and click that link.

<no audio> Click the **Demographics** link.

Open Calculator

The calculator icon opens the Add Income Screening Contact function. Go ahead and click on it.

<no audio> Click the **Calculator** icon.

Income Calculator

When the Income Calculator opens, a place holder, with today's date displays as the top node.

Transition Slide

<screen slides up to display entire screen>

Previous

Like in the Participant Folder, we can see previous income contacts.

<no audio> Click to the right of the scroll bar.

Previous 1

<no audio> Click to the left of the scroll bar.

Hover

<no audio> Hover over the **8/30/2018** income record.

<no audio> Click when ready to continue.

92 Days

The last income record was created on December 26th, which we know was when Will was certified.

If today is March 25th, it has been 90 days since Will's income was entered.

As we said before, when documenting income, the first thing we want to check is if there is already an income that has been entered within the past **92 days**.

Can Copy

Because if there is, we don't need to reassess income and can copy it to our current income record.

Enable Copy

If the income was originally documented within 92 days, when we click on it and highlight it...

<no audio> Click on the **12/26/2019** income record to highlight it.

Copy

...the **Copy Items to Current Income** button becomes enabled and the Original Screening Date changes to the date the highlighted record was originally documented.

If the 12/26 income had been copied, this date would be more than 92 days from today, and the button would not enable, and we would not be able to copy this income record to current.

So, this is the actual date the system looks at when determining whether a record can be copied.

When we click the button...

<no audio> Click the **Copy Items to Current Income** button.

Copied

The income record from 12/26 also becomes the income record for March 25 and the original screening date for the March 25th income record continues to be 12/26/2019.

Do Not Modify

Notice the copied income record could be modified since everything is enabled.

But, we should **never** modify a copied income. If we need to modify it for some reason, we shouldn't copy it.

Go ahead and click OK to save our new income record.

<no audio> Click the OK button to save the new income record.

Income in Demo

And the annual income displays in the CGS's Demographics screen.

Since income is assessed for a household, if we were certifying other members today, once income has been added for one member, the certification income requirement has been completed for all household members.

Transition Slide

<display> Transition to end slide

End

Thank you for reviewing this HuBERT on-demand training module presented by the MN Department of Health WIC Program.