Temporary Income Eligibility 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 document Temporary Income Eligibility in HuBERT.

Overview

If proof of income is not available at the time of the certification, the participant can be temporarily eligible until proof can be provided.

Temporary eligibility can only be extended to participants participating in adjunctive programs or whose self-declared household income meets the WIC Standard Income Guidelines (185% of Poverty) defined in MOM, Exhibit 5A.

As part of the required documentation, we should create an alert indicating what proof is needed.

And HuBERT will assist us by limiting benefit issuance to one month for temporarily eligible participants.

Adjunctive Programs

Scenario

Today is April 1st.

Augusta is newly pregnant and forgot to bring her MA eligibility letter.

Since we don't use the phone or online authorization at our agency, we will need her to bring her MA eligibility letter next time she comes for a nutrition visit.

We're going to get her cert started…

Transition Slide

<slides transition from Participant Search to Augusta's CGS screen>

CGS

Go ahead and open the income calculator.

<no audio – failure hint> Click the **Demographics** link.

Open Calculator

<no audio – failure hint> Click the **Income Calculator** icon.

Transition Slide

<screen slides up to display entire screen>

MA

Since she forgot her proof of MA we are going to select the MA checkbox.

<no audio – failure hint> Click the **MHCP-MA checkbox**.

MA Proof

And click its drop-down.

<no audio> Click the **MHCP-MA proof** drop-down.

30 Day

For temporary eligibility with adjunctive programs, we select the Pending Proof - 30 Day option from the Proof drop-down. Go ahead and select it.

<no audio> Select the **Pending Proof – 30 Day** option for adjunctive program temporary eligibility.

Pending Proof

When income proof is pending, we must **always** select the **Pending Proof of Income** checkbox.

The checkbox is the system indicator that sets the issuance limit to one month.

Click the Pending Proof of Income checkbox.

<no audio> Click the **Pending Proof of Income** checkbox.

Two Persons

Lastly, let's enter the Household Size.

Although Augusta lives by herself, we count a pregnant woman as two persons.

<no audio> Double-click in the **Household Size** field.

HH Size

<no audio> Enter **2** into the *Household Size* field then click the **OK** button to save the Pending Proof income record.

Finish Demo

We've completed the Demographics requirements…

Go ahead and click OK.

<no audio> Click the **OK** button.

Alert

Our next required documentation for temporary eligibility is to add an alert.

Go ahead and get the alert started.

<no audio – failure hint> Click the **Alert** icon (yellow triangle with exclamation point).

Add Alert

<no audio – failure hint> Click the **Add** button.

Add Alert 1

Click into the Alert Text field…

<no audio> Click into the Alert Text field.

Type Alert

…and we'll type a quick alert.

<Alert text> Needs to bring proof of MA before issuing May benefits.

Save Alert

Save the alert.

<no audio – failure hint> Click the OK button or press the Enter key.

Close Alert

<no audio> Click the Close button.

Complete Cert

<slide transition to completed cert>

Once the cert has been completed (by another CPA to meet Separation of Duties standards ☺) we need to make sure we inform the participant of her temporary eligibility and that we can only issue one month until we see proof of MA.

Issue Benefits

When we issue benefits…

<transition to Issue Benefits screen>

…because we selected the Pending Proof of Income checkbox…

One Month

…the system will limit issuance to only one month.

Transition Slide

<display> Transitions from Issuance screen to Overview slide.

Traditional Income

Scenario 1

Today is April 1st.

Norma is newly pregnant and forgot to bring her proof of income, which means we can only provide temporary eligibility today.

We're going to get her cert started…

Transition Slide

<slides transition from Participant Search to Augusta's CGS screen>

Open Demo 1

Go ahead and open the income calculator.

<no audio – failure hint> Click the **Demographics** link.

Open Calculator 1

<no audio – failure hint> Click the **Income Calculator** icon.

Transition Slide

<screen slides up to display entire screen>

Add Income

Go ahead and add a yearly income of 36000 dollars.

<no audio – failure hint> Click the **Add Item** button.

Yearly

<no audio – failure hint> Click the **Yearly** radio button.

Amount

<no audio> Press the Tab key on the keyboard or click into the Amount per Year field.

Yearly Amt

<no audio> Type **36000** into the *Amount per Year* field.

Proof

<no audio> Click the **Proof of Income** drop-down.

Pending

For temporary eligibility with traditional income, we select the PENDING PROOF option from the Proof drop-down.

We never select a proof that we haven't actually seen.

So, if the participant is going to provide proof at their next visit, we always select PENDING PROOF and never what proof they are going to provide.

Go ahead and select it.

<no audio> Select the **PENDING PROOF** option for temporary eligibility.

Save Income

And save the new income record

<no audio – failure hint> Click the **OK** button or press the Enter key.

Pending Proof 1

Again, when income proof is pending, we must **always** select the **Pending Proof of Income** checkbox.

The checkbox is the system indicator that sets the issuance limit to one month.

Click the Pending Proof of Income checkbox.

<no audio> Click the **Pending Proof of Income** checkbox.

Two Persons 1

Lastly, let's enter the Household Size.

Norma lives with her husband. Remember, we count a pregnant woman as two persons, so go ahead and enter the household size.

<no audio> Double-click in the **Household Size** field.

HH Size 1

<no audio> Enter the number of people in Norma's household into the *Household Size* field.

<no audio – failure hint> Norma + Husband + Baby = 3

Save

And save the pending proof income record.

<no audio – failure hint> Click the **OK** button or press the Enter key.

Finish Demo 1

We've completed the Demographics requirements…

Go ahead and click OK.

<no audio> Click the **OK** button.

Alert 1

What's our next required documentation for temporary eligibility? Go ahead (click anywhere if you need a hint).

<no audio – failure hint> Click the **Alert** icon (yellow triangle with exclamation point).

Add Alert 2

<no audio – failure hint> Click the **Add** button.

Add Alert 3

Click into the Alert Text field…

<no audio> Click into the Alert Text field.

Type Alert 1

…and we'll type a quick alert.

<Alert text> Needs to bring proof of MA before issuing May benefits.

Save Alert 1

Save the alert.

<no audio – failure hint> Click the OK button or press the Enter key.

Close Alert 1

<no audio> Click the Close button.

Complete Cert 1

<slide transition to completed cert>

Once the cert has been completed (by another CPA to meet Separation of Duties standards ☺) we need to make sure we inform the participant of her temporary eligibility and that we can only issue one month until we see proof of income.

Issue Benefits 1

When we issue benefits…

<transition to Issue Benefits screen>

…because we selected the Pending Proof of Income checkbox…

One Month

…the system will limit issuance to only one month.

Transition Slide

<display> Transitions from Issuance screen to overview slide.

End

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