

Income 3B – Pending Income – WINNIE Online Training Module

NOVEMBER 2023

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides an overview of documenting pending proof of income and how to resolve pending proof, in WINNIE the MN WIC Information System.

Documenting Pending Proof

Date

All dates in this section of the module are based on today's date being November 5, 2023.

Overview 1

If we are unable to verify income for the certification and have determined the household's income falls within the standard WIC Income Guidelines, or within 185% of the Federal Poverty Level, we can certify the participant or household as temporarily eligible for **30 days**.

WINNIE limits benefit issuance to one month until the proof has been verified and documented within the system.

There are no circumstances in which more than one month of benefits may be provided before income is verified.

<Transition Slide>

<screen description – no audio> Slide transitions to Search page.

Scenario 1

Enid and Otto Mattick both have appointments.

Enid is being certified as pregnant and...click on Otto's card...

<no audio> Click on Otto's card to view his details.

Scenario 2

Otto is due for a cert.

Click on Oz's card.

Scenario 3

Oz is only due for a nutrition visit.

<Transition Slide>

We are the income assessor for their certifications...

<screen description – no audio> Slide transitions to Otto's income page in Certification Mode.

Scenario 3

...and have started the cert and opened the income page.

Enid told us that her husband got a new job 3 months ago, he makes 82,000 a year, and there are still 6 in their household.

She forgot his paychecks for last month on the kitchen counter.

Since we can't verify their income during the appointment, we will have to certify them as temporarily eligible.

Let's enter their income and make sure they're eligible based on the WIC Standard Guidelines.

Go ahead and create the new income contact.

<audio - hint> Click the Add button in the Contacts panel.

Pending Proof 1

Enter their household size.

Remember, Enid is pregnant and per Enid their household size is 6.

<no audio> Enter their household size. (Enid is pregnant and per Enid HH Size = 6.)

<audio – hint> Click into the Household Size field.

Pending Proof 2

<no audio> Enter their household size. (Enid is pregnant and per Enid HH Size = 6.)

<no audio> If their household size is 6 and Enid is pregnant, we should add 1 person. Enter 7.

Pending Proof 3

It is the Pending Proof toggle that “flags” each member’s record and limits benefit issuance for everyone in the household to one month.

Since we do not have income proof, we **must** toggle on Pending Proof.

Toggle it on.

<no audio> Toggle on Pending Proof.

Pending Proof 4

Add the Yearly income of \$82000, following any cues that display. Click anywhere for hints.

<audio – hint> Click the Add button in the Itemized Income Information card.

Pending Proof 5

<no audio> Add the Yearly income of \$82000. Follow any cues that display. Click for anywhere for hints.

<audio – hint> Click the Yearly tab.

Pending Proof 6

<no audio> Add the Yearly income of \$82000. Follow any cues that display. Click for anywhere for hints.

<no audio> Click into the Yearly Amt 1 field.

Pending Proof 7

Type the amount without a comma.

<no audio> Add the Yearly income of \$82000. Follow any cues that display. Click for anywhere for hints.

<audio – hint> Type: 82000 without a comma.

Pending Proof 8

We still have to select a proof.

Click the Proof of Income dropdown.

Pending Proof 9

When pending proof of income, the only option we should ever select is PENDING PROOF.

Although Enid told us she would be providing paychecks, we never select that proof until we've actually viewed it.

Select ****PENDING PROOF****.

Pending Proof 10

Finish saving the income record.

<audio – hint> Click the OK button.

Pending Proof 11

<no audio> Finish saving the income record.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Pending Proof 12

After explaining to Enid how she can provide the income documentation, either by bringing it in next month or submitting it electronically, and that we can only provide one month of benefits until we are able to verify proof of income, we turn the appointment over to the certifier.

WIC STAFF (INCOME ASSESSOR): OK. You can either bring the paychecks in to clinic next month or use the WIC App to send them to us. We can issue one month of benefits today and can issue the rest once we see the paychecks.

WIC STAFF (INCOME ASSESSOR): This is Enid and Otto. Enid is going bring or send proof of income for the next nutrition visit.

WIC STAFF (CERTIFIER): Hi! We're so glad you came in today! I'll be doing the rest of your appointment with you...

<Transition Slide>

Once the certifications for Enid and Otto have been completed...

<screen description – no audio> Slide transitions to Issue Benefits page.

Pending Benefits 1

...when we issue benefits, since we toggled on Pending Proof, WINNIE limits all household members to one month of benefits.

As we learned in the certification modules, benefits must be issued when a participant is certified, and as we'll learn (or have learned) in the Issue Benefits modules the partial set starting today syncs Enid's benefits with the household cycle.

Since both sets start in the same month, they are considered one month's worth of benefits, and should always be issued together.

<Transition Slide>

Once one month of benefits is issued...

<screen description – no audio> Slide transitions to Issue Benefits with action-required messages.

Pending Benefits 2

...Until we resolve the pending proof, WINNIE follows policy and does not allow us to issue any more benefits.

Best practice is to write an alert when pending proof.

Go ahead and open the Alerts page.

<no audio> Select Manage Alerts from the sidebar.

Pending Alert 1

We can use the alert to inform the next staff person assisting the family what needs to be verified before issuing again.

Click the Add button.

Pending Alert 2

It's up to us, or our agency, whether this is a priority alert or not.

We're going to make it a priority.

Toggle it on, select Benefit Issuance for the Subject, and click into the text field.

Pending Alert 3-5

<no audio> Toggle on Priority, select Benefit Issuance for the Subject, and click into the text field.

Pending Alert 6

We're going to quickly type our alert.

<no audio – alert text> Need to verify paychecks before issuing any more benefits.

Pending Alert 7

Go ahead and save it.

<no audio> Click the Save button.

Pending Alert 8

And close Otto's folder.

<audio – hint> Select Search from the sidebar.

Pending Alert 9

When we toggle on Show Details...

Pending Alert 10

...our priority alert displays.

Open Enid's folder by double-clicking on her participant card.

<Waiting>

<screen description – no audio> Working...please wait and spin icon displays.

Pending Alert 11

Along with our alert, which provides what needs to be verified, the system also displays a general alert indicating that proof of income is required for each of the currently certified family members.

Click the button to continue.

Resolving Pending Proof

Date 3

All dates in this section of the module are based on today's date being November 6, 2023.

Overview Resolve 1

We can resolve the pending proof at any time.

To resolve it, we enter a new income record into the Participant Folder.

We must continue to follow SOD requirements, which means the staff person who enters this new income record must be someone other than the certifier.

Overview Resolve 2

MN WIC Policy requires we create an SOD-Income Note so that there is an auditable record of who entered the new income and how the pending proof was resolved.

The note should be added to all household members who were certified with pending proof.

Reference is MOM, Section 1.18 (Pending Eligibility and Presumptive Eligibility)

<Transition Slide>

<screen description – no audio> Slide transitions to Search page for the Mattick family.

Scenario 5

We were the income assessor for Enid and Otto's certs yesterday.

Enid submitted the paychecks electronically.

So, we can resolve the pending proof, issue their future benefits, and contact Enid to let her know that she has more benefits and to schedule Oz's cert in February.

WIC STAFF (INCOME ASSESSOR): Oh, wow! Enid already submitted the paychecks electronically.

WIC STAFF (INCOME ASSESSOR): We can resolve the pending proof, issue their future benefits, and notify Enid that she has more benefits and to schedule Oz's cert in February.

Scenario 5A

We'll just jot down the info from the paychecks, which are both for the same amount: \$3154 every other week.

Double-click on Enid's card to open her participant folder.

<Waiting>

<screen description – no audio> Working...please wait and spin icon displays.

Pending Alert 12

We no longer need our Priority Alert once we add our income record.

Go ahead and delete it then close the alert.

<no audio> Delete the Priority Alert then close the Display Alerts modal.

Pending Alert 13-14

<no audio> Delete the Priority Alert then close the Display Alerts modal.

Resolve Pending 1

Go ahead and resolve the pending income. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Select Income from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Resolve Pending 2

<no audio> Resolve the pending income. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the Add button in the Contacts panel.

Resolve Pending 3

<no audio> Resolve the pending income. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click inside the Household Size field.

Resolve Pending 4

<no audio> Green arrow points to Household Size = 7.

<no audio> Resolve the pending income. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Their Household Size is 7. Type 7.

Resolve Pending 5

<no audio> Resolve the pending income. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the Add button in the Itemized Income Information card.

Resolve Pending 6

<no audio> Resolve the pending income. Follow any cues that display. Click anywhere for a hint.

<audio – hint> The paychecks are for every other week, which is Bi-Weekly. Select the Bi-Weekly tab.

Resolve Pending 7

<no audio> Resolve the pending income. Follow any cues that display. Click anywhere for a hint.

<audio – hint> The paychecks are for the same amount (or constant). Click into the Weekly Amt 1 field.

Resolve Pending 8

<no audio> Resolve the pending income. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Type: 3154 without a comma.

Resolve Pending 9

<no audio> Resolve the pending income. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the Proof of Income dropdown.

Resolve Pending 10

<no audio> Resolve the pending income. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Select Pay Stub.

Resolve Pending 11

<no audio> Resolve the pending income. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the OK button.

Resolve Pending 12

<no audio> Resolve the pending income. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Resolve Pending 13

Just like while in Certification Mode, the system ensures the income record entered into the Participant Folder meets the standard WIC income guidelines.

SOD Note 1

Our next step is to create the SOD-Income note for all members certified with pending proof.

Since both Enid and Otto were certified, let's create an alert and copy it to a note.

Open the Alerts page.

<no audio> Select Manage Alerts from the sidebar.

SOD Note 2

Click the Add button.

SOD Note 3

Click into the Alert Text field and we'll type a quick note.

SOD Note 4

<screen description – no audio> ALERT TEXT: Pending proof resolved. HH Size = 7; Bi-weekly; \$3154.00; verified paystubs. – ST

SOD Note 5

Our note informs that pending proof is resolved, their household size, the amount entered and that we verified paystubs. <need to add boxes>

Go ahead and save the alert.

<no audio> Click the Save button.

SOD Note 6

Copy the alert to a note for Enid and Otto then delete the alert. Click anywhere for hints.

<audio – hint> Click the Copy to Note button.

SOD Note 7

<no audio> Copy the alert to a note for Enid and Otto then delete the alert. Click anywhere for hints.

<audio – hint> Click the Subject dropdown.

SOD Note 8

Click below the scroll bar.

<no audio> Copy the alert to a note for Enid and Otto then delete the alert. Click anywhere for hints.

SOD Note 9

<no audio> Copy the alert to a note for Enid and Otto then delete the alert. Click anywhere for hints.

<audio – hint> Select Separation of Duties (SOD) - Income.

SOD Note 10

<no audio> Copy the alert to a note for Enid and Otto then delete the alert. Click anywhere for hints.

<audio – hint> Toggle on Otto.

SOD Note 11

<no audio> Copy the alert to a note for Enid and Otto then delete the alert. Click anywhere for hints.

<audio – hint> Click the Save button.

SOD Note 12

<no audio> Copy the alert to a note for Enid and Otto then delete the alert. Click anywhere for hints.

<audio – hint> Click the Delete button.

SOD Note 13

<no audio> Copy the alert to a note for Enid and Otto then delete the alert. Click anywhere for hints.

<audio – hint> Click the Yes button.

SOD Note 14

We don't have to verify our alert is now a note, but this is a training module so we will.

Open the Notes page.

<no audio> Select Manage Notes from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

SOD Note 15

Enid's note...

<Transition Slide>

<screen description – no audio> Slide transitions to Otto's Notes page.

SOD Note 16

...and Otto's note.

<Transition Slide>

When we issue benefits...

<screen description – no audio> Working...please wait and spin icon display.

Issue after Resolve 1

...WINNIE suggests the next sets they are all eligible to receive.

<Transition Slide>

WINNIE also...

<screen description – no audio> Slide transitions to Display Alerts modal for the Mattick household.

Alert after Resolve 1

...will remove the proof of income system alerts the next time their folders are opened.

In the next module, we'll take a look at what to do if the family doesn't have an income.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

We could have used the Copy Items to Current Income function to resolve Enid and Otto's income Pending Proof.

Answer #1

The answer is False.

Although WINNIE will allow us to, we should never copy an income that has pending toggled on, nor should we ever toggle on pending for a record we've copied.

We also should never make changes when copying and in this instance, the Pending Proof toggle, income frequency and amount, as well as Proof of Income would have had to be changed.

End

End Slide

Thank you for reviewing this WINNIE online training module presented by the Minnesota Department of Health WIC Program.

If you have any feedback, comments, or questions about the information provided, please submit the [WINNIE Questions for the State WIC Office](#) form.

Minnesota Department of Health - WIC Program, 625 Robert St N, PO BOX 64975, ST PAUL MN 55164-0975; 1-800-657-3942, health.wic@state.mn.us, www.health.state.mn.us; to obtain this information in a different format, call: 1-800-657-3942.

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