

Income 5B Part 1 – Over-Income in Folder – 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 what to do if a household is determined to be income ineligible after entering income into the Participant Folder in WINNIE the MN WIC Information System.

Date

All dates in this module are based on today's date being November 7, 2023.

Overview 1

There are instances whereby an income record is entered into the Participant Folder that results in income ineligibility for the household.

Whether they are found ineligible during a cert or when the income is entered into the Participant Folder, the requirements are the same.

We must provide written notification of ineligibility by generating the Official Notification and issue benefits based on the number of days left in each member's certification.

Overview 2

The following is a review of the Federal Regulations already provided in the previous training modules.

When ready, click the Continue button.

<no audio> Federal Regulations require 15 days' notice of termination for those members in a current cert.

<no audio> Any members with **more than** 90 days left in their certification are eligible to receive a half package of food benefits for those 15 days.

<no audio> Any members with less than or equal to 90 days left can receive all their remaining sets of food benefits.

Overview 3

MN WIC policy is also the same.

We must document ineligibility in other terminated household members' folders and offer Nutrition Education and Referrals, and document those as appropriate.

Overview 4

We must also meet Separation of Duties (or SOD) requirements.

Someone other than the certifier must verify and document the income.

Since entering income into the Participant Folder is how we resolve temporary eligibility, we must also meet the requirements of a follow-up and enter an SOD-income note into the certified member(s)' folder(s).

<Transition Slide>

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

Scenario 1

Bristol England was certified as temporarily eligible, and coincidentally, we were the income assessor.

The household was issued one month of benefits, and we created a priority alert.

Click on Chester's card.

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

Scenario 2

Chester's cert ends in January, which is less than 90 days from today.

Click on York's card.

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

Scenario 3

York's cert ends in February next year, which is more than 90 days from today.

Mom has submitted her last two paychecks electronically and we've jotted down the details.

She gets paid \$2647.53 every other Friday.

Since we certified Bristol, double-click on his card to open his Participant Folder.

<no audio> Double-click on Bristol's card to open his Participant Folder.

<Waiting>

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

Alert 1

According to the alert, Mom got a raise, and we need to verify pay stubs before issuing more benefits.

It also says that all children have insurance through Mom’s job and that Mom was not receptive to applying to an MN Health Care program, so Presumptive Eligibility (or PE) is not an option.

We can delete this alert since it will no longer be applicable after today.

Go ahead and do that then close the Alerts modal.

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

Alert 2-3

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

Income PF 1

Go ahead and enter the income. Follow any cues that display. Click anywhere for hints.

<audio – hint> Select Income from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Income PF 2

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

Income PF 3

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

Income PF 4

<audio – hint> The Household Size is 5. Type 5.

Income PF 5

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

Income PF 6

<audio – hint> Click the Bi-Weekly tab.

Income PF 7

<audio – hint> Click into the Bi-Weekly Amt 1 field.

Income PF 8

Don't use a comma when entering the income amount.

<audio – hint> Enter the income amount: 2647.53

Income PF 9

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

Income PF 10

<audio – hint> Select Pay Stub.

Income PF 11

<audio – hint> Click the OK button.

Income PF 12

<audio – hint> Click the Save button.

Not Eligible Msg 1

Just like when we enter an income while in Certification Mode, when entered into the Participant Folder WINNIE will assess whether the income meets the Standard WIC Income Guidelines (185% of Federal Poverty Level), and it displays the same message informing us the participant isn't eligible and will be terminated along with any other household members.

We should also see if Presumptive Eligibility (or PE) could be applied, which we know isn't an option for this family as per the Priority Alert, Mom was not receptive to applying to MA or MN Care, which is a condition of PE.

Not Eligible Msg 2

Unlike during certification, we click "Yes" the first time we see this message because until we have a valid income record, no one in the household can be issued more benefits.

Go ahead and click Yes.

Official Notification 1

<screen description – no audio> Spin icon displays.

Notice that the Official Notification was not automatically generated.

We'll address that in a minute.

There are a number of steps to completing the income ineligibility.

We need to provide written Official Notification; create an SOD-income note in certified members folders; reinstate terminated members still eligible for benefits; issue benefits based on Federal Regulations; re-terminate reinstated members; document ineligibility in the folders of all members whose certifications were terminated; and offer nutrition education and referrals and document those if provided.

Again, we won't look at providing and documenting Nutrition Ed and Referrals because that is like any other nutrition visit, but we'll walk through an overview of the rest.

Let's start with providing the Official Notification.

Go ahead and generate it for Bristol.

<no audio> Generate the Official Notification for Bristol. Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

Official Notification 2

<no audio> Generate the Official Notification for Bristol. Click anywhere for a hint.

<audio – hint> Select Generate Official Notification.

Official Notification 3

<screen description – no audio> Official Notification displays.

Official Notification 4

Another tab opens in our current browser with the generated document.

We'll need to either download or print, depending on how we will be communicating this status change and providing the documentation to the family.

A couple of things...

If only providing one document, we need to add the other terminated members' names.

We also need to...if we click below the scroll bar...

Official Notification 5

Sign and date the document since our signature was not collected by the system when the family was determined ineligible.

<Transition Slide>

Closing this tab returns us to WINNIE.

<screen description – no audio> Slide transitions to York’s Demographics page.

Ineligible 1

Requirement one – done.

Next we need to create an SOD-Income Note.

SOD-Income Note 1

We know that anytime we record a follow-up income, we must create an SOD-Income note in the folder of any member who was certified with temporary eligibility.

Let’s open the Notes page.

<no audio> Select Manage Notes from the sidebar.

Document Ineligibility 1

<screen description – no audio> Spin icon displays.

Before we add our SOD-Income note...

We can also check off documenting ineligibility in Bristol’s folder.

When we generated the Official Notification, a System Note was created as well.

SOD-Income Note 2

Since only Bristol was certified as temporarily eligible, we only have to add the SOD-Income note to his folder.

Go ahead and do that. Follow any cues that display. Click anywhere for a hint.

<no audio> Add the SOD-Income Note. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the Add General Note button.

SOD-Income Note 3

<no audio> Add the SOD-Income Note. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the Subject dropdown.

SOD-Income Note 4

Click below the scroll bar.

<no audio> Add the SOD-Income Note. Follow any cues that display. Click anywhere for a hint.

SOD-Income Note 5

<no audio> Add the SOD-Income Note. Follow any cues that display. Click anywhere for a hint.

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

SOD-Income Note 6

Click into the Note Text field and we'll quickly type the note.

SOD-Income Note 7

Our note includes the household size, the bi-weekly income, that we verified paystubs, and also that Mom was not receptive to applying to MHCPs so PE was not an option.

<screen description – no audio> Note Text: Household Size 5; Bi-weekly income of \$2647.53 – verified paystubs. Mom not receptive to applying to MHCPs; PE not an option. Over-income. - ST

SOD-Income Note 8

Save the note.

SOD-Income Note 9

<screen description – no audio> Spin icon displays.

<pause for highlighting of note>

Requirement two is done.

Before we continue, let's take look at Bristol's Certification History.

<Waiting>

<screen description – no audio> Spin icon displays.

Certification History 1

There is no indication that the cert has been terminated because Certification History only displays what actually occurs during the cert itself.

Bristol has already been issued the one month of benefits he can receive with his temporary eligibility, and when the system terminates his certification, Issue Benefits becomes disabled.

Go ahead and hover over Issue Benefits to view the tooltip.

Click the button to continue.

<screen description – no audio> Tooltip: The Issue Benefits menu option is disabled because the participant is not currently in a valid certification.

<no audio> Hover over Issue Benefits to view the tooltip then click the button to continue.

Status Information 1

Open Bristol's Status Information.

<audio – hint> Click the Participant Menu.

Status Information 2

<no audio> Open Bristol's Status Information.

<audio – hint> Select Status Information.

Status Information 3

Instead of ineligibility as we saw when over-income during the certification, Bristol's certification has been terminated.

Close the modal.

Next Steps

All of the next steps are for other household members who are currently certified.

So we'll complete the requirements for this household's income ineligibility in the next training module.

Test Your Knowledge

T/F Q#1

True or False?

A Separation of Duties (SOD) - Income note only has to be added if the participant/household is pending proof and determined to be **over-income** at the follow-up.

Answer #1

The answer is False.

A Separation of Duties (SOD) – Income note must be added any time an income record is added as a follow-up to Pending Proof to ensure there is an auditable record that SOD requirements were met.

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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