

Traditional Income Screening 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 traditional income screenings in HuBERT.

Overview

Once we've ascertained there isn't a previous income that can be copied and that the household or individual is not participating in an adjunctive program, our next step is to perform a traditional income screening.

Transition Slide

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

Scenario

Today is March 26th.

Both Harry and Tedding are being recertified.

Harry is receiving SSI and we've completed documenting his individual adjunctive income.

Mom has also brought income information for the jobs that she and her husband work as proof of income for Teddy's certification.

Cursor

<cursor spins>

Open Inc Hx

Let's take a look at their Income History.

<no audio – failure hint> Click the **Income History** tab.

Income Hx

Harry's individual adjunctive record, and its proof displays, as well as the household size, which we documented earlier.

Go ahead and start the cert and open the income calculator.

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

Start CGS Msg

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

Open Demo

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

Open Calculator

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

Transition Slide

<display>Transitions from income calculator screen to overview slide.

Traditional

In general, we should review the gross income received by the household during the last 30 days.

However, there are situations whereby current income is more accurately determined by including income from the past 12 months, such as if self-employed or on temporary leave, or assessing income anticipated in the next 30 days, which may be appropriate if the sole supporter of the household has lost their job.

More information about assessing traditional income can be found in MOM, Section 5.2.4.

Transition Slide

<display>Transitions from overview slide to income calculator screen. Then income screen shifts up.

Add Item

Traditional income screening consists of entering the amount of pay during a specific time period.

We do this by clicking the **Add Item** button.

<no audio> Click the **Add Item** button.

Add Income

Our time periods consist of Hourly, Weekly, Monthly, Bi-Weekly or Semi-Monthly and Yearly, which is what we must first select in order to enter the amount and period of time.

Mom provided a pay stub for \$12 an hour for 15 hours a week.

What radio button do you think we click to enter this income? Go ahead.

<no audio – failure hint> Click the **Hourly** checkbox.

Add Amt

Yep. Go ahead and follow the screen hints to add this income.

<no audio> Click into the **Amount per Hour** field.

<no audio> Type **12** for the *Amount per Hour*.

Hours

<no audio> Click, or Tab, into the *Hours per Week* field.

Hrs/Week

<no audio> Type **15** for the *Hours per Week*.

Add Week

<no audio> Click, or Tab, into the *Number of Weeks* field.

Weeks

We can change from the standard 52 weeks to a different number say, for instance, if mom indicated that she doesn't work this job during the summer.

We need to make sure that we are getting an accurate income for each job per year because the system automatically annualizes each income entered.

52 Weeks

However, she works this every week of the year.

Next, we need to indicate what type of proof we verified for this income.

Go ahead and click on the Proof of Income drop-down.

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

Proof

Pending Proof will be discussed in another module.

Otherwise, go ahead and click below the scroll bar to see the available options.

<no audio> Click below the scroll bar to view available options.

Proof 1

<no audio> Click below the scroll bar to view available options.

Proof 2

We viewed a pay stub. Go ahead and select that.

<no audio> Click above the scroll bar.

Pay Stub

<no audio> Select **Pay Stub**.

Reviewed Proof

We are not required to copy or scan any documents for proof of income.

By selecting an option from the Proof of Income drop-down, we are indicating that the participant provided that proof of income and that we have reviewed it.

To save this income record, click OK.

<no audio> Click **OK** or press the Enter key to save this income.

Income Info

The income calculation displays in the Income Information grid.

Unlike adjunctive eligibility, we need to document all possible sources of household income.

Mom indicated she had brought a couple of pay stubs and a letter from her employer.

The next pay stub is a total amount paid every other week. Go ahead and add another income record.

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

Second Income

Let's click the semi-monthly radio button.

<no audio> Click the **Semi-monthly** radio button.

Semi vs. Bi

Semi-monthly has 24 paydays in a year. For example, always paid on the first and the 15th while Bi-weekly...

<no audio> Click the **Bi-weekly** radio button.

...is a payday every other Wednesday, for example, which has 26 paydays in a year.

This may sometimes require clarification.

Second Income 1

Mom has clarified that they get paid every other Friday.

Per the pay stub, their bi-weekly gross income is 1785. So let's add that.

<no audio> Click into the **Amount Per Period** field.

Amt/Period

<no audio> Type **1785** into the *Amounts per Period* field.

Second Proof

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

Second Proof 1

And select the proof we reviewed.

<no audio> Select **Pay Stub**.

Save Income

And save our new income record.

<no audio – failure hint> Click **OK** or press Enter to save the income record.

Calculation

The new income is added to our grid and the system calculates the total amount per year.

We have one more income to enter.

Mom's brought a letter from her employer indicating she gets paid 200 dollars every week of the year.

Go ahead and enter this income. (If you get stuck, click anywhere for a hint.)

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

Weekly

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

Amt/Week

<no audio> Click into the **Amount per Week** field.

<no audio – failure hint> Type **200** for the *Amount per Week*.

Third Proof

<no audio – failure hint> click the *Proof of Income* drop-down.

Third Proof 1

<no audio> Click below the scroll bar.

<no audio – failure hint> Select **Statement from Employer**.

Save Income 1

<no audio – failure hint> Click **OK** or press the Enter key to save the income record.

Edit/Delete

We can edit and delete income records but ONLY on the same date they are entered into HuBERT.

Let's say as we are giving the pay stubs and letter back to mom, we see that we had misread the gross bi-weekly income as 1785 when it was really 1765.

To edit **that** income record, we first need to highlight it by clicking on it in the grid. Go ahead and do that.

<no audio – failure hint> Click the **Bi-weekly record** in the Income Information grid to highlight it.

Edit

And click the Edit button.

<no audio> Click the **Edit Item** button.

Edit 1

The selected income info displays and is enabled for editing.

<no audio> Double-click inside the **Amount per Period** field to highlight the current amount.

Edit 1A

<no audio> Type **1765** into the *Amount per Period* field.

Edit 2

Notice the Total Amount per Year re-calculates based on the new amount.

Go ahead and save our edited income record.

<no audio – failure hint> Click **OK** or press Enter to save the income record.

Total Income

The income information grid updates along with the Total Amounts per Year.

Proofs Hover

Under Income Screening Contacts, all income proofs are recorded with the annual amount, which we can view if we hover over it.

<no audio> Hover over the household income.

<no audio> Click when ready to continue.

Delete

We can also delete income records on the same date they are created. What if we wanted to delete the last income record listed in the grid? What do we have to do first? Go ahead.

<no audio – failure hint> Click on the **Weekly row** in the *Income Information* grid to highlight it.

Delete 1

Yep. And then click the delete button.

<no audio> Click the **Delete Item** button.

Delete Msg

As usual, the validation message asking if we are sure displays.

We don't actually want to delete this income record, so click No.

<no audio> Click the **No** button or press the Enter key on the keyboard.

<no audio> Hover over the household income.

HH Size

The Household Size is required, once again, since this is a new income record.

Since Grandma came to live with them, their household size is 7.

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

HH Size 1

<no audio> Enter **7** into the *Household Size* field.

HH Size 2

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

Guidelines

When we click OK on a new traditional income record, HuBERT compares this total to the current income guidelines, which can be found in MOM, Exhibit 5A to ensure the total amount does not exceed the income limit for the number in the household.

Transition Slide

<demographics screen transitions to end slide>

End

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