

# Income 3A – Traditional 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 traditional income eligibility in WINNIE the MN WIC Information System.

### Date

All dates in this module are based on today's date being November 2, 2023.

### Overview 1

If a household is not adjunctively eligible, we perform an income assessment and review the current gross (or total) income received by the household during the 30 days prior to the WIC appointment.

### Overview 2

However, there may be situations where a household's current income is more accurately determined by assessing income from the past year or income that is anticipated for the next 30 days.

We should contact our State Consultant if we have an income situation not addressed by these timeframes.

### Overview 3

Income assessment can be complex and our focus in this module is how to enter an income record in WINNIE.

We should refer to MOM, Section 5.2.4 for more detailed information about income assessment and determination.

### <Transition Slide>

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

## Scenario 1

We are the income assessor and are completing the income for Sadie Werd who was just prescreened as Pregnant.

She isn't participating in any adjunctive programs and still has insurance through her parents.

Go ahead and collapse Clinic Actions, start the Cert, and open the Income page.

WIC STAFF: Thank you for coming in today and bringing this information with you! I'm going to get your appointment started for today.

## Income 1-2

<no audio> Collapse Clinic Actions, start the Cert, and open the Income page.

<Waiting>

<screen description – no audio> Spin icon displays.

## Income 3

<no audio> Collapse Clinic Actions, start the Cert, and open the Income page.

<Waiting>

<screen description – no audio> Spin icon displays.

## Income 4

Go ahead and start the new income contact.

## Income 5

With traditional income, household size can directly impact eligibility and should be carefully assessed.

Sadie lives by herself.

Go ahead and add her Household Size.

<no audio> Add Sadie's Household Size.

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

WIC STAFF: How many people live in your home?

PARTICIPANT: "It's just me."

## Income 6

<no audio> Add Sadie's Household Size.

<audio – hint> We count pregnant women as 2. Type 2.

## Income 7

Sadie works part-time as a school tutor and as a nanny.

She brought her four most recent paychecks from the school and a letter of employment from the family for whom she nannies.

We'll jot down the information and return the documents to her.

PARTICIPANT: "I work part-time at school as a tutor and also as a nanny."

PARTICIPANT: "I brought my four most recent paychecks from the school for last month and Mrs. M gave me a letter that tells how much I make on the 1st and 15th each month for being her nanny."

WIC STAFF: That's perfect. Let me jot this down and I can give these back to you.

## Income 8

For tutoring, she was paid \$15.65/hour and the first two paychecks were for 12 hours; the second two for 15 hours, which she says is typical.

The letter of employment for nannying states she is paid \$400 on the 1<sup>st</sup> and 15<sup>th</sup> each month.

WIC STAFF: Do you usually work different hours every week?

PARTICIPANT: "Yep. I usually work 12 to 15 hours each week tutoring."

## Income 9

Unlike adjunctive eligibility where we only ever document **one** program, we are required to document all household incomes.

We are adding a record to the Itemized Income Information grid.

Click that Add button.

## Income Line Item 1

The Income Line Item modal opens.

We are able to enter income frequency by Hour, Week (which it defaults to), Bi-Weekly (which is payment every other week, like Friday for example), Twice Monthly (which is like Sadie's paychecks on the 1<sup>st</sup> and 15<sup>th</sup>), Month and Year.

Each income frequency tab, except for yearly, has a Method dropdown.

## Income Line Item 2

The default is constant and that mean that only one income can be entered for that frequency.

We should use Constant when they are paid the same amount every time.

Go ahead and click the Method dropdown.

## Income Line Item 3

Our other option is variable.

Select that from the dropdown.

<no audio> Select Variable from the Method dropdown.

## Income Line Item 4

When we select variable, we can enter a different amount for the **same** income record.

We are NOT entering different weekly incomes from multiple people in the household.

We use variable to enter different amounts paid to the same person for one job.

## Income Line Item 5

WINNIE will average the weekly amount based on the number of weeks we enter income for.

For instance, if we were provided 3 weekly paychecks for the same job and they were paid 100 dollars for the first week, 200 for the second, and 300 for the third, the system will sum those values and divide by the number of Weekly Amounts to determine the average weekly amount for that income record.

## Income Line Item 6

We should only enter values into those fields necessary to record the income.

Only the first field is required.

## Income Line Item 7

WINNIE considers 0 to be a valid amount.

So, if we enter zeroes into each field, they will be included in the average and result in an incorrect total weekly amount.

## Income Line Item 8

Since 0 is considered a valid amount, we should never enter “0” into fields just because they are empty.

## Income Line Item 8A

We can enter a 0 to indicate an unpaid time period that should be included when calculating the average.

## Income Line Item 9

The number of variable incomes we can enter differs based on the selected frequency tab. Let’s select each frequency tab, starting with Bi-Weekly, moving right, and ending with Yearly. Select Variable on each tab to view the number of available fields.

## Save Message 1

Because we can only enter the income for one job at a time, and we made a change to the Weekly tab, this message displays asking if we are sure we want to work with another frequency.

Click Yes or press Enter.

<no audio> Select each frequency, starting with Bi-Weekly, moving right, and ending with Yearly. Select Variable on each tab to view the number of available fields.

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

## Income Line Item 10

<no audio> Select each frequency, starting with Bi-Weekly, moving right, and ending with Yearly. Select Variable on each tab to view the number of available fields.

<no audio> Select Variable from the Method dropdown.

## Income Line Item 11

<no audio> Select each frequency, starting with Bi-Weekly, moving right, and ending with Yearly. Select Variable on each tab to view the number of available fields.

<no audio> Select the Twice Monthly tab.

<screen description – no audio> There are four Bi-Weekly Amt fields.

## Save Message 2

<no audio> Select each frequency, starting with Bi-Weekly, moving right, and ending with Yearly. Select Variable on each tab to view the number of available fields.

<screen description – no audio> Confirm: You have unsaved changes. Are you sure you want to work with another frequency? Yes or No.

## Income Line Item 12

<no audio> Select each frequency, starting with Bi-Weekly, moving right, and ending with Yearly. Select Variable on each tab to view the number of available fields.

<no audio> Select Variable from the Method dropdown.

## Income Line Item 13

<no audio> Select each frequency, starting with Bi-Weekly, moving right, and ending with Yearly. Select Variable on each tab to view the number of available fields.

<no audio> Select the Monthly tab.

<screen description – no audio> There are four Twice Monthly Amt fields.

## Save Message 3

<no audio> Select each frequency, starting with Bi-Weekly, moving right, and ending with Yearly. Select Variable on each tab to view the number of available fields.

<screen description – no audio> Confirm: You have unsaved changes. Are you sure you want to work with another frequency? Yes or No.

## Income Line Item 14

<no audio> Select each frequency, starting with Bi-Weekly, moving right, and ending with Yearly. Select Variable on each tab to view the number of available fields.

<no audio> Select Variable from the Method dropdown.

## Income Line Item 15

<no audio> Select each frequency, starting with Bi-Weekly, moving right, and ending with Yearly. Select Variable on each tab to view the number of available fields.

<no audio> Select the Yearly tab.

<screen description – no audio> There are two Monthly Amt fields.

## Save Message 4

<no audio> Select each frequency, starting with Bi-Weekly, moving right, and ending with Yearly. Select Variable on each tab to view the number of available fields.

<screen description – no audio> Confirm: You have unsaved changes. Are you sure you want to work with another frequency? Yes or No.

## Income Line Item 16

The Yearly tab has only one constant field since we would never assess more than one year. Select the Hourly tab.

## Income Line Item 17

Hourly has two fields for constant: one for Hourly Amount and the other for the number of Hours Per Week.

Select Variable from the Method dropdown.

## Income Line Item 18

<no audio> Select Variable from the Method dropdown.

## Income Line Item 19

Once the Hourly Amt is entered, the corresponding Hours Per Week field is also required.

Let's grab our sticky note and start entering Sadie's income.

Her first two paychecks are for 15.65 per hour for 12 hours.

Click into the Hourly Amt 1 field.

## Hourly 1

Type 15.65.

## Hourly 2

Click into the Hours Per Week 1 field and type 12.

## Hourly 3

<no audio> Click into the Hours Per Week 1 field and type: 12

## Hourly 4

Sadie's second set of paychecks were the same hourly amount and both for 15 hours.

Let's add our second paycheck.

Click into the Hourly Amt 2 field.

## Hourly 5

Notice that once we click out of the calculable fields, the system calculates our Weekly Amount.

Continue entering the second amount of 15.65 for 15 hours.

## Hourly 6

<no audio> Type 15.65, click into Hours Per Week 2, and type 15.

## Hourly 7

<no audio> Type 15.65, click into Hours Per Week 2, and type 15.

## Hourly 8

If the other two paychecks we reviewed were for different pay or hours, we would want to add those also.

Since they were the same as the first two we entered, and the system calculates the average, we only have to enter the two.

Go ahead and click the Proof of Income dropdown.

## Average Income 1

Again, having clicked out of the calculable fields, the system has now calculated her **average** weekly income.

## Proof of Income 1

We must always select a Proof of Income.

By selecting a proof, we are indicating that the participant or representative has provided that proof of income and that we have reviewed it.

This is all the documentation that is required.

## Proof of Income 2

Most proofs are self-explanatory.



We'll see how PENDING PROOF, Self Declaration, and Waiver Signed are used in other training modules.

If documenting income for migrants, please contact your State Consultant with questions.

Go ahead and select Pay Stub, which we reviewed as proof for this income record.

## Save Income 1

Click OK to save the income.

<no audio> Click the OK button.

## Income 10

The new income record, with today as the Create Date, displays in the grid.

Just like adjunctive programs, we can select the row and edit or delete on the same date the record is created.

## Income 11

If only one income record is entered, for instance if Sadie's only job was tutoring, the total is the average for the selected income frequency, which in this case was Weekly.

## <Transition Slide>

<screen description – no audio> Slide transitions to topic slide.

## Income Guidelines 1

The standard WIC Income Guidelines are based on 185% of the Federal Poverty level.

The limits are added to the back end of WINNIE, and it compares the income entered against the guidelines to ensure income eligibility.

It will compare the total based on the payment frequency, in this case Weekly, for her household size.

WIC Income Guidelines are available in MOM, Exhibit 5A.

## <Transition Slide>

If we entered a second income...

<screen description – no audio> Slide transitions to Income page with two income records.

## Income 12

...that was the same frequency, meaning Hourly per week, WINNIE would maintain the **Weekly** Income Total.

<screen description – no audio> Slide transitions to Income page with once income record.

## Income 13

We do have another income record to enter but it's a different frequency.

Go ahead and enter the income for Sadie's nanny job. Click anywhere for hints.

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

## Income 2-1

<audio – hint> Select the Twice Monthly tab.

## Income 2-2

<audio-hint> There is only one amount to enter. Click into the Twice Monthly Amt 1.

## Income 2-3

<no audio> Enter a whole number. Do not type a decimal.

<audio – hint> Type 400.

## Income 2-4

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

## Income 2-5

<audio – hint> Select Statement from Employer.

## Income 2-6

<audio – hint> Click the OK Button.

## Income 12

If a second income record is entered using a different frequency, the system annualizes both incomes.

We can view the annualized equation by hovering over the Description column in each row.

Go ahead and do that then click the Continue button.

<no audio> Hover over each row's Description to view the tooltip then click the Continue button.

### <Transition Slide>

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

## Non-Standard Durations 1

When two incomes of a different frequency are entered and the system annualizes them, the frequencies are automatically multiplied by 12 if months, 24 if twice monthly, 26 if bi-weekly, and 52 if weeks.

So, what do we do if the standard amount of time isn't worked?

## Non-Standard Durations 2

It's important we accurately assess and determine a household's income.

Unfortunately, as WINNIE works now, we will have to perform any non-standard calculations outside of the system.

If the amount of time worked isn't standard, we should calculate the income based on the appropriate number of weeks, months, or time periods, annualize it, and then enter the amount into WINNIE as a Yearly income.

## Non-Standard Durations 3

If an income is calculated outside of the system, we must document the calculations in a general note with the subject of Income Information.

Review the detailed contents that should be included when documenting then click the button to continue.

### <Transition Slide>

<screen description – no audio> Slide transitions back to Sadie's income page.

## Income 2-7

Let's finish adding Sadie's income. Click Save.

<no audio> Click the Save button.

### <Waiting>

WINNIE compares the income against the guidelines...

<screen description – no audio> Spin icon displays.

## Income 2-8

...and displays the green saved banner if the income is within the Standard WIC Income Guidelines.

This completes our review of how to enter a traditional income into WINNIE.

Click the button to continue.

## Test Your Knowledge

### T/F Q#1

True or False?

When assessing household income, we should review the total income after deductions and taxes are taken out.

### Answer #1

The answer is False.

We must assess household income based on the gross, or total, income prior to deductions and taxes.

### T/F Q#2

True or False?

The system will always annualize the income if more than one income record is entered.

### Answer #2

The answer is False.

The system always annualizes the income if more than one income is entered, and they each have a different frequency (such as weekly and monthly). However, if more than one income is entered and they are both the **same** frequency the system will maintain the income frequency instead of annualizing.

### Multiple Choice Q#3

We have two different amounts for an income that is paid on the 1<sup>st</sup> and 15<sup>th</sup> each month. Which statement is incorrect?

- A. We should select the Twice Monthly tab.

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- B. We should enter the income values into the Twice Monthly Amt 1 and Twice Monthly Amt 2 fields.
- C. We should enter zeroes into the Twice Monthly Amt 3 and 4 fields.
- D. The system will average the incomes entered.
- E. The system does not annualize the income but maintains the income based on the selected frequency.

### Answer #3

The answer is C.

When selecting Variable for the Method, we should only enter values into the appropriate number of fields based on the income we have been provided.

We should never enter zeroes into blank fields. Since zero is considered a valid amount, and the system averages based on the number of completed fields, adding zeros would result in an incorrect average calculation.

### 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](mailto:health.wic@state.mn.us), [www.health.state.mn.us](http://www.health.state.mn.us); to obtain this information in a different format, call: 1-800-657-3942.*

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