

Income 5A Part 2 – Over-income in Cert – WINNIE Online Training Module

OCTOBER 2023

Introduction

Intro

This WINNIE online training module is provided by the Minnesota (MN) Department of Health WIC Program. It provides a continued overview of what to do if a household is determined to be income ineligible during a certification in WINNIE the MN WIC Information System.

Date

All dates in this module are based on today's date being October 26, 2023.

<Transition Slide>

<screen description – no audio> Slide transitions to Laurel Greene's income page in his Participant Folder.

Scenario Overview

In the last module, we determined that the Greene family was over-income while certifying Laurel, and we had removed his cert unlocking his folder and re-enabling Issue Benefits.

Issue Benefits 1

There are a few steps to completing the income ineligibility: issue benefits based on Federal Regulations, re-enter income to terminate household members, provide written Official Notification, document ineligibility in the folders of other members whose certifications were terminated, and offer nutrition education and referrals and document those if provided.

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.

Go ahead and select Issue Benefits from the sidebar.

<Waiting>

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

Issue Benefits 2

Let's just note, that anything required to issue benefits, such as updating Hunter's Food Prescription III Verified Date or creating new food packages, was already taken care of behind the scenes.

Issue Benefits 3

We recognize that we may not yet be familiar with issuing benefits in WINNIE, but we are going to touch on **what** we issue more than **how** we issue in this module.

Let's click below the scroll bar so that we can view all the suggested benefit sets.

Issue Benefits 4

Since there are fewer than 90 days left in Laurel's cert, he can receive the rest of his benefits, which is a $\frac{3}{4}$ package for this month.

So, Laurel is set.

Issue Benefits 5

There are more than 90 days left in Fern's cert, so she is only eligible to receive the 15 days-worth of benefits, or a half-package, which means we have to edit her suggested benefit set.

Click the Edit button.

Edit Benefits 1

Click the Package Size dropdown.

Edit Benefits 2

In general, we shouldn't decrease the package size when editing, but this the one instance where we are actually required to do so.

Select $\frac{1}{2}$ Package.

Edit Benefits 3

The reason is required.

Click the Reason for Editing dropdown.

Edit Benefits 4

We have only one option and although we **are** issuing late that is not really why we are decreasing the package size, but that's all we have to select.

If we feel we need to document why, we can always create a note.

Go ahead and select our reason.

Edit Benefits 5

Save our change.

<no audio> Click the Save button.

<Waiting>

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

Issue Benefits 6

Let's click below the scroll bar again.

Issue Benefits 7

Since neither of the future benefits sets are toggled on, they won't be issued, so Fern is set with receiving just the half package.

Like Laurel, Hunter has fewer than 90 days left in his cert, so he can receive the rest of his food benefits.

To do that, we toggle on the future sets.

Toggle on the November set.

Issue Benefits 8

Toggle on the December set.

Issue Benefits 9

Hunter is now good to go also.

We are done correcting the suggested benefits based on allowed amounts when terminating certifications and are ready to issue benefits.

<Transition Slide>

Since the benefit issuance process is always the same, we'll just issue behind the scenes.

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

Issue Benefits 10

After successfully issuing benefits, we have to start the cert again and re-enter the income record.

Click the Close button.

<Waiting>

<screen description – no audio> Spin icon displays.

Cert 2-1

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

Cert 2-2

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

<screen description – no audio> Demographics in Participant Folder, select Begin Certification on sidebar, “Are you sure you want to start a certification?”, click Yes, spin icon, Demographics page in Certification Mode, select Income from the sidebar, spin icon, opens to Income page in Certification Mode.

Cert 2 Income 1

We have to re-add the same income record.

Since we’ve already done that once in this module, we’ll enter it behind the scenes.

Go ahead and start the process by clicking the Add button to create the new contact.

<Transition Slide>

<screen description – no audio> Slide transitions to completed Income page: HH Size 5, Annual Income = \$99,950.71.

Cert 2 Income 2

Go ahead and save the income record.

Not Eligible Msg 2

This time we click Yes on the Warning message.

<no audio> Click the Yes button.

<Waiting>

<screen description – no audio> Spin icon displays.

Not Eligible Msg 3

The next message informs us that the participant is ineligible due to being over income.

We click the Mark as Ineligible button to indicate that is correct.

Go ahead and do that.

<no audio> Click the Mark as Ineligible button.

Capture Signature 1

Two things happen at once.

First, WINNIE opens the Capture Electronic Signature modal.

Official Notification 1

Second, it simultaneously opens another tab in our current browser with the Official Notification document.

This is temporary data that can either be printed or downloaded.

Click below the scroll bar.

Official Notification 2

Remember, another requirement is notification of the right to a fair hearing, which is included (as well as the Nondiscrimination Statement).

Our signature is not required on this document if we find them ineligible during the Certification because our signature is captured by the system.

We are going to print this. Click the Print button.

Official Notification 3

The document will be sent to our network's printer.

Click the Print button.

Capture Signature 2

Returning to our WINNIE tab in the browser...

We capture only our signature to indicate we have determined their ineligibility.

Go ahead and finish capturing our signature.

<no audio> Capture the electronic signature.

Capture Signature 3

<screen description – no audio> “Some Trainer” signature displays, and the Save Signature button becomes enabled.

<no audio> Capture the electronic signature.

<Waiting>

<screen description – no audio> Spin icon displays.

<Transition Slide>

We printed the document for Laurel...

<screen description – no audio> Slide transitions to Official Notification.

Official Notification 4

...but we have to also provide written notification for Hunter and Fern because their certs were terminated as well.

We can do this by simply adding their names to the document.

Since our signature was captured by the system, we do not need to sign the document before giving it to their representative or proxy.

Remember, we should also offer both nutrition education and referrals, and document as appropriate.

Click the button to continue.

Certification History 1

Let’s take a look at Certification History.

<no audio> Select Certification History from the sidebar.

Certification History 2

Our certification attempt displays the reason why it wasn’t completed and our signature.

Now let’s take a look at notes.

<no audio> Select Manage Notes from the sidebar.

Documenting 2

When we generated the Official Notification, a System Note was added to Laurel's folder, but the note only displays in the member's folder for whom the notification was generated.

MN WIC policy requires that we also document ineligibility for other members whose certifications were terminated, and we have a couple of options for documenting.

Alert to Notes 1

We already know that we can create an alert with the reason for the ineligibility, in this case over-income, copy it to a note, select the subject of Cert Info/Nutrition Education, select the desired members, and save the note then delete that alert.

Documenting 3

Our other option is to have WINNIE create the notes for us by generating the Official Notification for each terminated member.

We're going actually do that instead.

Select Fern from the Participant Menu.

Documenting 4

<no audio> Select Fern from the Participant Menu.

Documenting 5

We want to generate the Official Notification while in Fern's folder.

Go ahead and do that. Click for hints.

<no audio> Generate the Official Notification for Fern.

<audio – hint> Click the Participant Menu.

Documenting 6

<no audio> Generate the Official Notification for Fern.

<audio – hint> Select Generate Official Notification.

Documenting 7

When the document automatically opens in another browser tab on top of our WINNIE tab, we can simply close it since we already printed the notification for Laurel and added both Fern's and Hunter's names.

Go ahead and close the browser tab.

Documenting 8

Since the note was added to the page we're currently viewing, we have to refresh it to view the new System Note.

We can do that by clicking the Reset button.

Documenting 9

We would then repeat this for Hunter.

Either process for documenting works and it is up to us which we do.

A couple of other things to look at, starting with Status Information.

Go ahead. Click anywhere for hints.

<no audio> Open the Status Information modal. Click anywhere for a hint.

<audio – hint> Click the Participant Menu.

Status Information 1

<no audio> Open the Status Information modal. Click anywhere for a hint.

<audio – hint> Select Status Information.

Status Information 2

The system also documents the terminations and ineligibility in the Status Information.

However, since this only provides their current status and is over-written if a new cert were to be started, it doesn't meet the documentation requirement met by adding the note, which provides a history.

Fern's information is a termination.

Now let's look at Laurel's.

<no audio> Open Laurel's Status Information modal.

<audio – hint> Open the modal's Participant Menu by clicking Fern's name.

Status Information 3

<no audio> Open Laurel's Status Information modal.

Status Information 4

Laurel's status is Ineligibility due to over-income, instead of a termination.

In general, it's the same difference, except when viewing the Show Details on the Search page.

<screen description – no audio> Slide transitions to Search page with Fern’s Show Details.

Show Details 1

Fern’s details show the termination date and reason.

Click on Hunter’s card.

Show Details 2

As does Hunter’s.

But, when we click on Laurel’s card...

<no audio> Click on Laurel’s card to view his details.

Show Details 3

Laurel’s Details have been cleared because his cert information no longer applies.

It doesn’t display termination information because he was determined ineligible, which although the end result is the same, is different in the database.

Click the button to continue.

Knowledge Test

T/F Q#1

True or False?

When a participant is determined ineligible during a certification, we must always sign the Official Notification document before providing it to the participant or representative.

Answer #1

The answer is False.

Since our signature is captured by the system when a participant is determined ineligible during a certification, we do not have to sign the Official Notification before providing it to the family.

End

End Slide

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

INCOME 5A PART 2 – OVER-INCOME IN CERT

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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