# Presumptive Eligibility 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 Presumptive Eligibility, or PE, in HuBERT.

## Overview

Participants with a household income greater than the WIC standard guidelines, which are 185% of the poverty level, but within the MN Health Care Program, or MHCP, income guidelines can be Presumptively Eligible for WIC.

When ascertaining if a household is presumptively eligible, we must see proof of income, the participant cannot just tell us what their income is (or self-declare) and they must agree to apply for either MA or MN Care as soon as possible.

## Overview 1

With PE, we can issue up to 3 months of benefits while we wait to see if they will be eligible for MA or MN Care.

Documentation includes creating an alert to indicate the number of months benefits were issued for and a reminder that at the next nutrition visit, staff should determine the current status of the MCHP application.

As well as a PE note, which should include the household size, the income amount, and the type of income proof that was verified.

We'll just note that an SOD-Income note can be used for multi-purposes:  verify Separation of Duties and document PE.  But, as with all things SOD, we won't cover any more information about SOD in this training module.

## Scenario

Today is April 20th.

Ivan Ich is being newly certified...

## Open Calc

…and we've started the guided script.

Go ahead and open the income calculator.

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

## Transition Slide

<screen slides up to display entire screen>

## Income

Mama has brought in pay stubs indicating her gross pay is $1635 every other week.  She lives with her 10 year old son and Ivan.  Go ahead and enter this income information.

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

## Add Bi-Weekly

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

## Amt per Period

<no audio – failure hint> Click inside the **Amount per Period** text box.

## Amt per Period 1

<no audio – failure hint> Type 1635 into the **Amount per Period** field.

## Proof of Income

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

## Proof of Income 1

<no audio – failure hint> Select **Pay Stub.**

## Save Income Record

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

## HH Size

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

## HH Size 1

<no audio – failure hint> Their household size is 3.

## Save Income

<no audio – failure hint> Click OK or press the Enter key.

## Guidelines

As we mentioned before, when we click OK, HuBERT compares the yearly total to the current WIC Standard Income Guidelines to ensure the total amount does not exceed the limit based on the household size.

## Guidelines 1

In this instance, $42510 for a household of 3 would be considered over-income.

## Over-income Msg

Which is what this message says.

It also informs us that the participant will be terminated and asks if the information is correct.

Lastly, it warns us that any other members of the household will also be terminated.

## MHCP Guidelines

However, if we look at the MHCP/Insurance Affordability Programs guidelines, we can see that her income is less than the limit for these programs.

## MHCP Guidelines 1

If this occurs, and the participant is willing to apply for either MA or MN Care, we can put them on the program as presumptively eligible.

And, we would click No to indicate this is not the correct income information that we want to record.

## Documentation

Since we only record one type of income, which in this instance will be presumptive eligibility for MA, we need to delete this income.

However we will still need to document that we verified their income in a note.

For that, we will need the household size, yearly amount, and proof.

## Delete Income

OK.  Now we are ready to delete the income.  Go ahead and do that.

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

## Delete Income 1

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

### Select MHCP

Next, we need to select the MHCP program they will apply for.

Go ahead and do that.

<no audio – failure hint> Click the **MHCP-MA checkbox**.

### MA Proof

And click its drop-down.

<no audio> Click the **MHCP-MA proof** drop-down.

### PE – 90 Day

What proof are we going to select? Go ahead.

<no audio> Select **Presumptive Eligibility - 90 Day.**

### Save PE

Yep.  Presumptive Eligibility – 90 Day.

Go ahead and save the PE income record.

<no audio – failure hint> Click OK or press the Enter key.

### Finish Demo

We'll complete the Demographics requirements…

And go ahead and click OK.

<no audio> Click the **OK** button.

### Alert

Next, we need to complete the required documentation:  an alert and a note.

Go ahead and get the alert started.

<no audio – failure hint> Click the **Alert** icon (yellow triangle with exclamation point).

### Add Alert

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

### Add Alert 1

Click into the Alert Text field…

<no audio> Click into the Alert Text field.

## Type Alert

…and we'll type a quick alert…

<Alert text> Presumptive Eligibility – issued 3 months benefits; verify MA application in July - SM

## Save Alert

… that includes the number of months that benefits will be issued for, 3, and that the next staff person should verify application for MA in July.

Go head, save the alert.

<no audio – failure hint>  Click the OK button or press the Enter key.

## Close Alert

<no audio>  Click the Close button.

## Note

Next is to complete our general note.  Go ahead and get that started.

<no audio – failure hint> Click the **Notes** icon (yellow square with settings wheel).

## Add Gen Note

<no audio – failure hint> Click the **Add General Note** button.

## Note Subject

And open the Subject drop-down.

<no audio – failure hint> Click the **Subject drop-down.**

## Subject

Our subject is PE or Presumptive Eligibility.  Click below the scroll bar until you reach it in the list.

<no audio – failure hint> Click below the scroll bar.

## Subject 1

<no audio – failure hint> Click below the scroll bar.

## Subject 2

<no audio – failure hint> Click below the scroll bar.

### PE Subjects

There are two PE subjects:  Presumptive Eligibility and PE Update.

The first one is for the initial documentation that were are completing now.

The PE Update is used for documenting their PE information at their next nutrition visit.

<no audio> Select **PE (Presumptive Eligibility).**

### Note Text

Click inside the Note Text field…

<no audio>  Click into the **Note Text** field.

### Type Note

…and we'll quickly type the note.

<no audio – note text> HH Size 3; $42510/year; Pay stub

### Note Requirements

The note documents the traditional income screening we verified but did not save in HuBERT.

We should note that if there were more than one household member being certified today, we would need to create this note in each member's Participant Folder.

Go ahead and save the note.

<no audio – failure hint> Click the OK button or press the Enter key.

### Close Note

<no audio> Click the **Close** button.

### Close Scenario

Based on how separation of duties is performed at our agency, we or another staff person would complete Ivan's certification and issue 3 months of benefits.

# PE Follow-up

### FU Overview

At the next nutrition visit, we must verify the current status of a participant's MN Health Care Program application, create a new income record, and document how their PE was resolved in a PE Update note,

(we can also use the SOD – Income note but again, as with all things SOD, this depends on how our individual agency performs Separation of Duties so we won't go into any further details).

## FU Overview 1

If their MHCP application is still pending, and we can verify this, we can provide an additional 3 months of food benefits.

In this instance, we would document that PE was still pending in a PE Update note and indicate if any more benefits were issued.  We would also want to make sure there is an appropriate alert to notify the staff person at their next nutrition visit that PE was still pending and that MHCP participation must be verified before any more benefits can be issue.

This is especially important since we cannot issue benefits beyond this second 3-month issuance extension without verifying they are actually on MA or participating in MN Care and creating a viable income record.

<Need transition slide>

## FU Scenario

Today is April 20th.

Clyde Zdale and Roe Zdale were certified in January and received three sets of benefits.

Mom is here for a nutrition visit and has brought in their MA Eligibility letter.

<no audio> Click on Roe's row to view his Show Details.

## FU Scenario 1

Go ahead and open Roe's folder.

<no audio – failure hint after 7 seconds> Double-click on Roe's row in the Participant List or click the Open Participant Folder icon.

## Cursor

<cursor spins>

## Alert

In this instance, the alert was saved to a note.  The alert was created documenting all information that must be included in the alert and note.  This can be a helpful shortcut when having to document in more than one household members' folders.

Since we no longer need the alert we can go ahead and delete it.

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

## Delete Alert

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

## Close Alert

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

## CPA Alert

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

## Cursor

<cursor spins>

## Open Income Hx

We're going to document the PE Follow-up in the Income History tab.

<no audio> Click the **Income History** tab.

## Income Hx

Per their income record in January, they were Presumptively Eligible.

Since this is a temporary type of income eligibility, we need to add a new income screening contact.

<no audio> Click the **Add Income Screening Contact** icon.

## Income Calc

<slides transitions upward>

## Add MA

Mom brought the MA eligibility letter.  Go ahead and complete the income record.  (Click anywhere if you need a hint to continue.)

<no audio – failure hint>  Click the **MHCP-MA** checkbox.

## Add Proof

<no audio – failure hint>  Click the **Proof** drop-down.

## Select Proof

<no audio – failure hint>  Select **Eligibility Letter.**

### FU HH Size

<no audio – failure hint>  Double-click inside the **Household Size** field.

### FU HH Size 1

<no audio – failure hint> According to the January income record, there are 11 people in the household.

### FU Save Income

<no audio – failure hint> Click OK or press the Enter key.

### FU Income Hx After

Our next step is to document how their PE was resolved in a general PE Update note.  Go ahead and get that started.

<no audio – failure hint> Click the **Notes** icon (yellow square with settings wheel).

### FU Add Gen Note

<display only> Alert copied to Note when PE first recorded at cert.

<no audio – failure hint> Click the **Add General Note** button.

### FU Note Subject

And open the Subject drop-down.

<no audio – failure hint> Click the **Subject drop-down.**

### FU Subject

Our subject is PE Update.  Click below the scroll bar until you reach it, then select it from the list.

<no audio – failure hint> Click below the scroll bar.

### FU Subject 1

<no audio – failure hint> Click below the scroll bar.

### FU Subject 2

<no audio – failure hint> Click below the scroll bar.

### PE Subjects

<no audio> Select **PE Update**

### FU Note Text

Click inside the Note Text field…

<no audio>  Click into the **Note Text** field.

## FU Type Note

…and we'll quickly type the note.

<no audio – note text> PE resolved – MA Eligibility Letter

## FU Note Requirements

This is an example of a straightforward resolution.

There may be some presumptively eligible participants whose income circumstances have changed or are unable to follow through with applying to a MN Health Care Program.

If they return to WIC, since PE is a form of temporary income eligibility, we need to always write a PE Update with whatever resolution occurs.

## All HH Mbrs

OK. Since both Roe and Clyde were certified in January, like the PE note, the PE Update note must also be documented in both their folders.  For this, we have a couple of different options:

We could have written this as an alert, copied it to a note, then deleted the alert.

We could copy the note text and paste it into a note in Clyde's folder.

Or we could just re-type our short note, which is what we will do in this instance.

Go ahead and save the note.

<no audio – failure hint> Click the OK button or press the Enter key.

## Close Note

<no audio> Click the **Close** button.

## Close PF

Let's close Roe's folder and open Clyde's.

<no audio> Click the **Close Participant Folder** icon.

## Open Other PF

<no audio – failure hint after 7 seconds> Double-click on Clyde's row in the Participant List or click the Open Participant Folder icon.

## Cursor

<cursor spins>

## Other PF

Let's take a look at Income History.

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

## Other Income Hx

As expected, since income is household-level, and Clyde's folder WAS NOT OPEN, the income we already entered into Roe's folder displays in Clyde's.

So all we have to do is add our PE Update note. Go ahead and get that started.

<no audio – failure hint> Click the **Notes** icon (yellow square with settings wheel).

## Other Add Gen Note

<display only> Alert copied to Note when PE first recorded at cert.

<no audio – failure hint> Click the **Add General Note** button.

## FU Note Subject

Click the drop-down and we'll scroll to our subject.

<no audio – failure hint> Click the **Subject drop-down.**

## Scroll

Scroll through drop-down list.

## Other Subject

Select our Subject.

<no audio> Select **PE Update**

## Other Note Text

And one more time, click into the Note text field and we'll quickly type our short note.

<no audio>  Click into the **Note Text** field.

## Other Type Note

<no audio – note text> PE resolved – MA Eligibility Letter

### Other Save Note

And save the note.

<no audio – failure hint> Click the OK button or press the Enter key.

### Other Close Note

<no audio> Click the **Close** button.

### End PE

And we've completed our PE follow-up.

<Income Hx screen displays>

# End

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