

Income Ineligible (Over-Income) in Participant Folder Script

Introduction

This HuBERT on-demand training module...

Intro1

... is provided by the MN Department of Health WIC Program. It provides an overview of what to do if an income entered into the Participant Folder is over the income guidelines.

Overview

On occasion, a participant who was temporarily eligible due to pending proof of income returns with an income that is above the presumptive and/or standard income guidelines.

Since proof of income is usually provided at the next nutrition visit, the income record is entered into the Participant Folder.

Just like in the CGS, if the participant is over-income, HuBERT automatically terminates all household members.

Overview 1

These other members are eligible to receive benefits per Federal guidelines: a half package if there are more than 90 days left in their cert period or their remaining benefit sets if less than 90 days are left.

We will have to print the eligibility letter or the Official Notification, write the names of all terminated members on the Ineligibility Letter we provide to them, and document that it was provided, and why, in a general note.

In this module...

Like in the previous module, we will touch on screens and processes in HuBERT that are discussed later. The concepts are important and should be what we focus on.

<display> Transitions to Participant List from overview slide.

Scenario

Today is April 23rd.

Isolde House was certified in March and has brought pay stubs from her new job as proof of income.

Go ahead and open her participant folder.

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

Cursor

<cursor spins>

Alert

Since we’ll be verifying her income today we can delete the alert. Go ahead.

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

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

<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 are going to enter an income record. Go ahead and get us started.

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

Add Income Icon

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

Add Item

<screen slides up to display entire screen>

We double-checked with Isolde and there are still 4 people living in her home.

Per her pay stubs, she is paid \$2957 every other week..

Go ahead and add her income.

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

Payment Freq

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

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

<no audio> Type **2957** into the *Amount per Period* field.

Proof

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

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

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

HH Size

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

<no audio – failure hint> Their household size is 4.

Save Income

Go ahead and save the income record.

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

Standard Guidelines

With a household size of 4, HuBERT will assess this income as over the eligible limit based on the WIC Standard Income Guidelines.

PE Guidelines

At this point, we need to also assess Presumptive Eligibility.

And we can see that her income is also too high for PE.

Over-Income Msg

Remember, this message tells us the participant is not income eligible based on the current income information and that the system will automatically terminate Isolde and any other currently certified members of the household.

However, when over-income is determined in the Participant Folder, HuBERT will not automatically print an ineligibility letter like it did when a participant was over-income while in the Cert Guided Script.

So we handle over-income in the Participant Folder a little differently.

Over-Income Msg 1

Since Isolde was pending proof of income and only temporarily eligible, she isn't eligible for any more benefits so it will be OK if HuBERT terminates her.

For other members who will be terminated, we will need to assess their eligibility for benefit issuance, re-instate them so that we can issue, then re-terminate them.

When we terminate them, we will be able to select the reason of over-income and generate an Official Notification letter of ineligibility.

Then, per policy, we'll need to ensure there is documentation that the Ineligibility Letter was provided.

Yes Over Income

So, all that said, when entering income into the Participant Folder, we click Yes on this message.

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

Save Income Record

And save the income record.

Yet to Do

Our next steps?

Assess issuance for other members and re-instate them.

Let's minimize Isolde's folder and open her child, Madd's folder.

<no audio> Click the **Minimize** icon.

Show Details

And click on Madd's row to view his Show Details.

<no audio> Click on Madd's row.

Open PF

We can see that Madd's cert, which ended in June, has been terminated but based on policy, he is still eligible for more benefits.

Go ahead and open his folder.

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

Cursor

<cursor spins>

Reinstate

In order to issue benefits to Madd, we need to reinstate his cert. Do you remember how to do that?

Go ahead. (Click anywhere if you need a hint.)

<no audio – failure hint> Click the **Participant Activities** menu.

Reinstate 1

<no audio – failure hint> Select **Reinstate Terminated Participant**.

Reinstate 2

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

Issue Benefits

Next, we need to issue his benefits. Click the icon.

<no audio> Click the **Issue Benefits** icon.

<cursor spins>

Not Eligible

Isolde, who was temporarily eligible and was issued one set of benefits when her income proof was pending, is not eligible for any more benefits.

Issuance

However, Madd, whose certification ends on June 30th, is still eligible for his remaining sets of benefits since there are less than 90 days left in his cert.

Issue

So, to issue, let's click the **Issue Benefits to Selected Members** button.

<no audio> Click the **Issue Benefits to Selected Members** button.

Send EBT Data

And click the Send EBT Data button.

<no audio> Click the **Send EBT Data** button.

Sending

<display> Sending EBT Issuance

Close Issuance

And close the issuance screen.

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

Re-Terminate

Now that we've issued, we need to re-terminate Madd's cert.

Go ahead and do that. (Click anywhere if you need a hint.)

<no audio – failure hint> Click the **Participant Activities** menu.

Term

<no audio – failure hint> Select **Manually Terminate Participant**.

Term Reason

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

Select Reason

Our reason is Income No Longer Meets Requirements. Go ahead and select it.

<no audio> Select **Income No Longer Meets Requirements**.

Notification

We are going to print the Official Notification so we can just leave the checkmark and click OK.

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

Letter

<display> Letter of Ineligibility displays.

The Letter of Ineligibility includes private information, of which we always needs to be aware.

It also includes the reason for their ineligibility.

Since the letter was printed from Madd's folder, his name is printed on it. Since it applies to Isolde also, we will simply write her name on it as well.

<no audio> Click when ready to continue.

Letter 1

<transition to bottom half of letter>

The letter also has the long version of the Non-Discrimination statement printed on it.

<no audio> Click when ready to continue.

Open Notes

One of the policy requirements when providing an ineligibility Letter is that it is documented in notes.

Let's take a quick look at Madd's notes.

<no audio> Click the **Manage Notes** icon.

System Note

The system creates a note when the Official Notification is printed, which takes care of our requirement in Madd's folder.

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

Document Req.

Since the system note is only created in Madd's folder, where the letter was printed from, we need to document that a Letter of Ineligibility was provided to other household members as well. So, let's go back to Isolde's folder.

<display> Isolde's folder displays open to the Income History screen.

And write a note.

<no audio> Click the **Manage Notes** icon.

Add General Note

We'll add a general note.

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

Subject

Our subject is going to be Income Information.

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

Hot Key

Instead of using the scroll bar, let's type the hot key, "I", to jump down the list to that topic and select it.

<no audio> Type an “1” to jump to Income Information in the list.

Income Info

And press the Enter key to select it.

<no audio> Press the Enter key on the keyboard to select Income Information.

Note Text

Click inside the note text field and we’ll type a quick note.

<no audio> Click inside the Note Text field.

<displays on screen> Participant terminated due to over-income (\$76882/yr; HH size 4). Ineligibility letter has been provided.

Go ahead and save our note.

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

Close Notes

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

Open Demo

Go ahead and open the Demographics AdditionalInfo2 tab.

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

Demo

<no audio – failure hint> Click the **AdditionalInfo2 tab**.

AddInfo2

When a participant is terminated due to over-income in the Participant Folder, the **termination reason and date** (instead of Ineligibility reason and date) display in the Demographics AdditionalInfo2 tab.

Go ahead and close Isolde’s folder.

Term in Details

It also displays in the Show Details panel.

<no audio> Click on Isolde’s row.

Term in Details

<displays> Income No Longer Meets Requirements displays for Termination Reason and 4/23/2020 for the Termination Date in Isolde’s Show Details panel.

End

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