Temporary Eligibility Follow-up 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 the follow-up to Temporary Income Eligibility in HuBERT.

Temp Elig

When participants return with their proof of income, whether it is for adjunctive or traditional income, we enter a new income record into the Participant Folder.

Under no circumstances can temporary eligibility be extended another 30 days.

Proof must be shown before another set of benefits can be issued and HuBERT won't allow otherwise.

Adjunctive Follow-up

Scenario

<display> Slide transitions from overview to Participant List screen.

Today is April 8th and mom has returned to WIC with the MA eligibility letter for Erna Nichol.

Scenario A

She was certified on February 6th and received one set of benefits.

Open PF

Go ahead and open her folder.

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

Cursor

<cursor spins>

Alert

The alert created by the person who verified Erna's household income displays.

We can delete it since mom brought the MA proof. Go ahead.

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

Delete Alert

<no audio – failure hint> Click the **Yes** button (on the confirmation message).

Close Alert

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

CPA Alert

Next the CPA Review alert displays with a general reminder that Proof of Income is Required.

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

Cursor

<cursor spins>

Issue Ben

We said that the system won't allow us to issue more until we verify proof.

If we were to open the Issue Benefits screen before adding an income record…

<cursor clicks on Issue Benefits icon>

FU Issue Msg

The message displays that Erna has a proof pending and has already received the one month of benefits allowed.

Go ahead and click the Cancel button.

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

Open Income Tab

We enter the new income record in the Participant Folder in the Income History tab.

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

Double-check HH

The last income record occurred at Erna's cert in February and we can see that she is Pending Proof.

When we double-check her household size, mom confirms it is still just Erna, her partner and herself.

Add Income Record

To add a new income record in the Participant Folder, we click the Add Income Screening Contact icon.

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

Transition Slide

<screens slides up>

No Copy

Why can't we use the Copy Items to Current Income function? Select one answer.

A. We can?
B. It's not enabled.
C. This new record won't be exactly the same as the previous income record we would be copying.
D. It can only be used for traditional income screening.

Did you select C?

We can't use it, not because isn't enabled, since the button would become enabled if we clicked on the February income record in the grid <pause for graphics>, and it we can be used for adjunctive incomes.

But because the February record does not have the same proof we will be selecting for this income record, we cannot copy it.

MA

Go ahead and add the new income record.

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

MA Proof

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

Proof

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

HH Size

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

HH Size 1

<no audio> Enter the number of people in Erna's household into the Household Size field.

<no audio – failure hint> According to the February income record, there are 3 people in the household.

Save Income

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

New Record

<no audio> Well Done!

Now that the new income record has been added, when we go to issue benefits…

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

Benefits

The system suggests tri-monthly issuance.

When participants return with their proof of income for traditional income screening, the process is pretty much the same. Let's take a look.

Traditional Income

Scenario 1

Today is March 31st and June Bugg has returned with pay stubs for the last month as proof of income.

Open PF

She was certified on February 21st and received one set of benefits.

Go ahead and open her folder.

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

Cursor

<cursor spins>

Alert 1

The alert created by the person who verified June's household income displays.

We can delete it since June brought paystubs as proof. Go ahead.

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

Delete Alert 1

<no audio – failure hint> Click the **Yes** button (on the confirmation message).

Close Alert 1

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

CPA Alert 1

And the CPA Review reminder alert displays. Go ahead and close it.

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

Cursor

<cursor spins>

Issue Ben 1

As before, if we were to open the Issue Benefits screen before adding proof of income…

<cursor clicks on Issue Benefits icon>

FU Issue Msg 1

The message displays that June needs income proof before another month of benefits can be issued.

Go ahead and click the Cancel button.

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

Open Income Tab 1

Where do we enter the proof of income? Go ahead.

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

Income Hx 1

The PENDING PROOF income record was recorded at June's cert on February 21st.

When we double-checked her household size, June said that it is still just her.

Pay Stubs

June brought pay stubs for the last month. These are the two most recent pay stubs.

Write Pay

We'll write down the pertinent details.

Add Income Record 1

Go ahead and add June's proof of income. Click anywhere if you need a hint as to the next step.

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

Transition Slide

<screens slides up>

Add Item

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

Add Hourly

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

Amt per Hr

<no audio – failure hint> Press the Tab key or click inside the **Amount per Hour** text box.

Amt per Hr 1

<no audio – failure hint> Type 15 in the **Amount per Hour** field,

Hrs per Wk

<no audio – failure hint> Press the Tab key or click inside the **Hours per Week** text box.

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 2

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

HH Size 2A

<no audio – failure hint> It's just mom in the household but since she is pregnant, her household size as 2.

Save Income 1

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

New Record 1

<no audio> Well Done!

Now that the new income record has been added, when we go to issue benefits…

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

Benefits 1

The system suggests tri-monthly issuance.

That is all there is to temporary eligibility follow-up.

However, it is possible that when a participant returns with their pay stub, they turn out to be over-income. We will take a look at how to document this in the Participant Folder in the Over-Income module.

Transition Slide

<display> Transitions to end slide.

End

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