Income 1B – Copy to Current & SOD – 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 an overview of using the Copy Items to Current Income function to help meet Separation of Duties (SOD) requirements, in WINNIE the MN WIC Information System.

Overview

We can use the Copy Items to Current Income function for households that have a member still in a current certification period and whose income is being entered prior to the scheduled appointment.

SOD Income Notes 1

If income cannot be entered on the same date as the certification, the income assessor can write a Separation of Duties – Income note up to 21 days before the scheduled certification.

This note must be added to each household member's folder that is being certified.

Date

Dates in this section of the module are based on today's date being October 20, 2023.

<Transition Slide>

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

Scenario 2-1

The Trees family have cert appointments on the 25th.

We are the income assessor.

We have received their income information via a secure electronic format and verified through secure communications the number in their household.

We're going to jot down the information for later reference.

Scenario 2-1A

Birch will be one year old on the 24th so can be certified as a child.

Click on Magnolia's card.

<no audio> Click on Magnolia's card to view her details.

WIC STAFF 1: I'm going to jot this down and then I can just delete the file from my Downloads folder…

Scenario 2-2

Magnolia also has an appointment, most likely to certify as Pregnant.

Click on Willow's card to view her details.

Scenario 2-3

Willow also has an appointment.

Go ahead and double-click on Willow's card to open her participant folder.

Scenario 2-4

Today isn't the date of the appointment, so we need to create a Separation of Duties – Income note, which we can add up to 21 days prior to the appointment.

Since we have to add that note to all members being certified, we are going to create an alert then save it to a note.

Let's open the Alerts page…

<no audio> Select Manage Alerts from the sidebar.

Alert 1

…and add an alert.

<no audio> Click the Add button.

Alert 2

We're not going to make this a priority alert, but we want to add a Subject.

Click the Subject dropdown.

Alert 3

Click below the scroll bar.

Alert 4

There are two SOD topics.

The Reviewed subject is used for agency management and chart auditing to ensure that SOD requirements are being met.

We always want to use the Separation of Duties (SOD) – Income topic.

Go ahead and select it.

<no audio> Select Separation of Duties (SOD) – Income.

Alert 5

Click into the Alert Text field.

Alert 6

As a general guideline, we are documenting the income information we are going to enter into the system.

For adjunctive eligibility, we include household size, the program, how we verified participation in the program, and our initials.

For traditional income, again, we include household size, then dollar amount, frequency or how often they're paid, the proof we viewed, and our initials.

Alert 7

We'll type our alert based on what we jotted down earlier and add that we entered the income into the Participant Folder on 10/20, which we are going to do in a couple of minutes.

Alert 8

Click Save.

<no audio> Click the Save button.

Copy to Note 1

Next, we want to copy this alert to a note, which allows us to easily add it to all household members' folders that will be certified.

Our name, as the income assessor, must be associated with both the alert and the note.

Click the Copy to Note button.

Copy to Note 2

Go ahead and select the appropriate subject.

Copy to Note 3

<no audio> Click below the scroll bar.

Copy to Note 4

<no audio> Select the appropriate subject.

Copy to Note 5

Toggle on Copy in the Household Members grid header.

Copy to Note 6

And save.

<no audio> Click the Save button.

Copy to Note 7

Let's verify our note.

Open Manage Notes.

<no audio> Select Manage Notes from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Copy to Note 8

As we said before, as the income assessor, we must be the creator of both the alert and the note.

We're good to go.

Our next step is to use the Copy function to meet our SOD requirements.

Go ahead and open the Income page.

<no audio> Select Income from the sidebar.

Copy for SOD 1

As long as we have one household member in a current certification, which in this instance we do, we can enter the income information into the Participant Folder.

We haven't reviewed adding income yet, so we are going to do most of the steps behind the scenes for now since our focus is the Copy function.

Let's get our verified household size and income info that we jotted down and click the Add button to start.

<Transition Slide>

<screen description – no audio> Slide transitions to completed income contact.

Copy for SOD 2

We've added the household size, frequency, income, and proof.

That's all that we, the income assessors, are going to do.

The rest is up to the certifier.

<Transition Slide>

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

Date 3

Dates in this section of the module are based on today's date being October 25, 2023.

<Transition Slide>

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

Copy for SOD 3

We are now the other co-worker who will be certifying the Trees family.

We've already viewed the details and their folders when preparing for their appointments.

Double-click to open Birch's folder.

WIC STAFF 2: Good morning! Thanks so much for coming in today...

<Waiting>

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

Copy for SOD – Alert 1

The income assessor's alert displays indicating the income was entered into the Participant Folder on 10/20.

After today, the alert isn't applicable, so let's delete it.

Copy for SOD – Alert 2

<no audio> Delete the alert.

Copy for SOD – Alert 3

And close the display alerts modal.

Copy for SOD 4

When on the Income page in Certification Mode…

<screen description – no audio> Slide transitions to Demographics in Certification Mode.

Copy for SOD 5

…we won't receive a checkmark because the system doesn't recognize the 10/20 income record for the certification because it wasn't entered on the same date as the cert.

That is, until we copy it.

Go ahead and click the Copy button.

<no audio> Click the Copy Items to Current Income button.

Copy for SOD 6

And Save.

<no audio> Click the Save button.

Copy for SOD 7

We now have our certification income requirement met, along with the SOD requirements, and our Income checkmark.

Click the button to continue.

Test Your Knowledge

Multiple Choice Q#1

Which statement is true?

    A.   We should use the Copy Items to Current Income function when certifying a pregnant mom whose child was just certified 35 days ago.

    B.   It's OK to copy an income record that has Pending Proof toggled on since the system will allow us to do so.

    C.   If an alert documenting income is saved to a note, both the alert and the note must be added by the income assessor.

    D.   If we copy an income item entered by another staff person on a different date, the system will display the staff who entered the original income in Certification History.

    E.   All of these are true.

Answer #1

The answer is C.

The income assessor must create the alert documenting the income, as well as copy the alert to a note to meet SOD requirements. The certifier, or medical and nutrition risk assessor, cannot save the alert to a note and still meet the SOD requirements.

Correction for other answers:

    A. The Copy function cannot be used when certifying pregnant women because MN WIC counts the fetus (or fetuses) as part of the household. If the household size changes, we cannot use the Copy function.

    B. We should never copy a Pending Proof nor copy an income and toggle Pending Proof on.

    C. The person who copies the income is the person who is recorded in Certification History as having completed the income.

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, www.health.state.mn.us; to obtain this information in a different format, call: 1-800-657-3942.

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