Income 2B – Pending Adjunctive – 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 documenting pending proof for adjunctive programs in WINNIE, the MN WIC Information System.

Documenting Pending Proof

Date

All dates in this section of the module are based on today's date being October 23, 2023.

Overview 1

If we are unable to verify adjunctive eligibility for the certification, we can certify the participant or household as temporarily eligible for **30 days**.

WINNIE limits benefit issuance to one month until the proof has been verified and documented within the system.

There are no circumstances in which more than one month of benefits may be provided before adjunctive eligibility is verified.

Scenario 1

Jack Kett is due for a cert.

He's already received his October benefits but is due in early November for his next set.

Click on Mark's card to view his details.

Scenario 2

Mark is certified until next April but due for a Mid-Certification Assessment next month.

Since he's here with Jack we will complete that as well.

His next benefit set will also be for November.

<Transition Slide>

We have started Jack's cert and opened his income page.

<screen description – no audio> Slide transitions to Jack's income page in Certification Mode.

Scenario 3

We are the income assessor for Jack's certification.

Mom informed us that there are 6 in their household and the only adjunctive program they participant in is MN Care.

Unfortunately, the system we use is down so we can't verify this (which never happens, but could) and mom doesn't have any "proof" other than an MHCP card, which we can't use as proof.

> PARTICIPANT: "There are still 6 of us and the only other program we are part of is MN Care."
>
> WIC STAFF (INCOME ASSESSOR): I am so sorry but we can't double-check Jack's participation in MN Care because their system is down…
>
> PARTICIPANT: "I have his health card but you haven't been able to use it before…"
>
> WIC STAFF (INCOME ASSESSOR): No. We can't. But we'll keep trying to get this confirmed…

Scenario 4

Until we can verify his participation in MN Care, we can only certify Jack with temporary eligibility.

Go ahead and create the new income contact. Click anywhere for a hint.

<audio – hint> Click the Add button in the Contacts panel.

> WIC STAFF (INCOME ASSESSOR): Until we can double-check with MN Care, we can only provide one month of benefits…

Pending Proof 1

Let's enter the household size of 6.

Pending Proof 2

<no audio> Enter the household size of 6.

Pending Proof 3

Pending Proof **must be toggled on** if we can't verify the adjunctive participation before or during the certification.

Toggle it on.

Pending Proof 4

Create the pending adjunctive (MN Care) income record. Click for anywhere for hints.

<audio – hint> Click the Add button in the Adjunctive Eligibility card.

Pending Proof 5

<no audio> Create the pending adjunctive (MN Care) income record. Click anywhere for a hint.

<audio – hint> Click the Program dropdown.

Pending Proof 6

<no audio> Create the pending adjunctive (MN Care) income record. Click anywhere for a hint.

<audio – hint> Select MHCP-MN Care.

Pending Proof 7

<no audio> Create the pending adjunctive (MN Care) income record. Click anywhere for a hint.

<audio – hint> Click the Proof dropdown.

Pending Proof 8

<no audio> Create the pending adjunctive (MN Care) income record. Click anywhere for a hint.

<audio – hint> Select Pending Proof - 30 Day.

Pending Proof 9

<no audio> Create the pending adjunctive (MN Care) income record. Click anywhere for a hint.

<audio – hint> Click the Update button.

Pending Proof 10

<no audio> Create the pending adjunctive (MN Care) income record. Click anywhere for a hint.

<audio – hint> Click the Save button.

\<Waiting\>

\<screen description – no audio\> Spin icon displays.

Pending Proof 11

When the pending proof record is saved, it is the Pending Proof toggle that "flags" each household member's record and limits their next benefit issuance to one month.

Since the adjunctive income record is household, anyone that is eligible based on the household-level adjunctive eligibility is impacted.

Pending Proof 12

Once we let Cass know that we'll keep trying to confirm the MN Care, we turn the appointment over to the certifier.

> WIC STAFF (INCOME ASSESSOR): This is Cass, Jack, and Mark. I haven't been able to verify MN Care because of the system issue but I'll keep trying...
>
> WIC STAFF (CERTIFIER): Hi! We're so glad you came in today! I'll be doing the rest of your appointment with you...

\<Transition Slide\>

Once the certification for Jack (and MCA for Mark) have been completed by our co-worker…

\<screen description – no audio\> Slide transitions to Issue Benefits page.

Pending Benefits 1

…when we issue benefits after toggling on Pending Proof, the system displays the pending proof message for both Jack and Mark and suggests only one month of benefits.

\<Transition Slide\>

Once one month of benefits is issued…

\<screen description – no audio\> Slide transitions to Issue Benefits with action-required messages.

Pending Benefits 2

…until we resolve the pending proof, WINNIE follows policy and does not allow us to issue any more benefits.

Best practice is to write an alert when pending proof.

Go ahead and open the Alerts page.

<no audio> Select Manage Alerts from the sidebar.

Pending Alert 1

We can use the alert to inform the next staff person assisting the family what needs to be verified before issuing again.

Click the Add button.

Pending Alert 2

It's up to us, or our agency, whether this is a priority alert or not.

We're going to make it a priority.

Toggle it on and click the Subject dropdown.

<no audio> Toggle on Priority an click the Subject dropdown.

Pending Alert 3

<no audio> Toggle on Priority an click the Subject dropdown.

Pending Alert 4

There may be a number of subjects that would work for us, but we want to address their next benefit issuance, so we'll select that for our subject.

Select Benefit Issuance and click into the text field.

Pending Alert 5

<no audio> Select Benefit Issuance and click into the text field.

Pending Alert 6

We'll just type a quick alert.

<no audio – alert text> Need to verify MN Care for Jack before issuing more benefits.

Pending Alert 7

And save the alert.

<no audio> Click the Save button.

Pending Alert 8

Go ahead and close Jack's folder.

<audio – hint> Select Search from the sidebar.

Pending Alert 9

Open Jack's folder again by double-clicking on his participant card.

<Waiting>

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

Pending Alert 10

Along with the alert we created which informs future staff of what needs to be verified, the system also displays a general alert indicating that proof of income is required for each of the impacted family members.

Click the button to continue.

Resolving Pending Proof

Date 3

All dates in this section of the module are based on today's date being October 24, 2023.

Overview Resolve 1

We can resolve pending proof at any time.

To resolve it, we enter a new adjunctive record into the Participant Folder.

We must continue to follow SOD requirements.

The staff person who enters this new adjunctive record must be someone other than the certifier.

Overview Resolve 2

Per MN WIC policy we must also create an SOD-Income Note so that there is an auditable record of who entered the new adjunctive income and how it was resolved.

The note should be added to the participant folders of all household members who were certified as temporarily eligible.

Reference is MOM, Section 1.18.

<Transition Slide>

<screen description – no audio> Slide transitions to Search page for the Kett household.

Scenario 5

We were the income assessor for Jack's cert yesterday when the system was down for verifying his participation in MN Care.

We made a note to ourselves to double-check today, and we were able to use the system to verify his participation.

So, we can resolve the pending proof, document the follow-up, issue Jack and Mark's future benefits, and notify their representative that the next nutrition visit will be in February.

Double-click on Jack's card.

<no audio> Double-click on Jack's card to open his participant folder.

<Waiting>

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

Pending Alert 12

We no longer need our Priority Alert once we add our income record.

Go ahead and delete it then close the alert.

<no audio> Delete the Priority Alert then close the Display Alerts modal.

Pending Alert 13-14

<no audio> Delete the Priority Alert then close the Display Alerts modal.

Resolve Pending 1

Go ahead and resolve the adjunctive pending proof by adding a new adjunctive record for MN Care. Household Size is 6. Click anywhere for a hint.

<no audio> Resolve the MN Care Adjunctive Pending Proof. Household Size = 6. Click anywhere for a hint.

<audio – hint> Select Income from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Resolve Pending 2

<no audio> Resolve the MN Care Adjunctive Pending Proof. Household Size = 6. Click anywhere for a hint.

<audio – hint> Click the Add button in the Contacts panel.

Resolve Pending 3

<no audio> Resolve the MN Care Adjunctive Pending Proof. Household Size = 6. Click anywhere for a hint.

<audio – hint> Click inside the Household Size field.

Resolve Pending 4

<no audio> Resolve the MN Care Adjunctive Pending Proof. Household Size = 6. Click anywhere for a hint.

<audio – hint> Type 6.

Resolve Pending 5

<no audio> Resolve the MN Care Adjunctive Pending Proof. Household Size = 6. Click anywhere for a hint.

<audio – hint> Click the Add button in the Adjunctive Eligibility card.

Resolve Pending 6

<no audio> Resolve the MN Care Adjunctive Pending Proof. Household Size = 6. Click anywhere for a hint.

<audio – hint> Click the Program dropdown.

Resolve Pending 7

<no audio> Resolve the MN Care Adjunctive Pending Proof. Household Size = 6. Click anywhere for a hint.

<audio – hint> Select MHCP-MN Care.

Resolve Pending 8

<no audio> Resolve the MN Care Adjunctive Pending Proof. Household Size = 6. Click anywhere for a hint.

<audio – hint> Click the Proof dropdown.

Resolve Pending 9

<no audio> Resolve the MN Care Adjunctive Pending Proof. Household Size = 6. Click anywhere for a hint.

<audio – hint> We used the online system to verify Jack has MN Care.

Resolve Pending 10

<no audio> Resolve the MN Care Adjunctive Pending Proof. Household Size = 6. Click anywhere for a hint.

<audio – hint> Click the Update button.

Resolve Pending 11

<no audio> Resolve the MN Care Adjunctive Pending Proof. Household Size = 6. Click anywhere for a hint.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

Resolve Pending 12

Our next step is to add the SOD-Income note for all members certified with pending proof.

Since only Jack was certified, we can just add a note to his folder.

Let's write our note.

Go ahead and get us started. Follow any cues that display. Click anywhere for hints.

<audio – hint> Select Manage Notes from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

SOD Note 1

<no audio> Let's write our note. Get us started. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the Add General Note button.

SOD Note 2

<no audio> Let's write our note. Get us started. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the Subject dropdown.

SOD Note 3

Click below the scroll bar.

<no audio> Let's write our note. Get us started. Follow any cues that display. Click anywhere for a hint.

SOD Note 4

<no audio> Let's write our note. Get us started. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Select Separation of Duties (SOD) - Income.

SOD Note 5

Click into the Note Text field and we'll quickly add our note.

SOD Note 6

When we document our pending proof resolution, we want to include what we verified and how.

Go ahead and save it.

<no audio> Click the Save button.

<screen description – no audio> NOTE TEXT: Able to verify MN Care participation with online system. – ST

<Waiting>

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

Issue after Resolve 1

Now when we issue benefits… go ahead and select Issue Benefits from the sidebar.

<Waiting>

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

Issue after Resolve 2

The next two sets are auto-suggested for all eligible family members by the system.

<Transition Slide>

The next time we open one of their folders…

<screen description – no audio> Slide transitions to Display Alerts modal for the Kett household.

Alert after Resolve 1

…WINNIE has also resolved the System alerts about pending proof.

In the next module, we'll look at documenting traditional income.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

We could have used the Copy Items to Current Income function to resolve Jack's Adjunctive Pending Proof.

Answer #1

The answer is False.

Although WINNIE will allow us to, we should never copy an income that has pending toggled on, nor should we ever toggle on pending for a record we've copied.

We also should never make changes when copying and in this instance, both the Pending Proof toggle and the Proof selection would have to be changed.

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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