

Income 4A – Presumptive Eligibility – WINNIE Online Training Module

NOVEMBER 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 Presumptive Eligibility, or PE, in WINNIE the MN WIC Information System.

Date

All dates in this module are based on today's date being November 12, 2023.

Overview 1

Households that are over-income using the standard WIC Income Guidelines, but whose income is less than the MN Health Care Programs (MHCP) guidelines, and who are not currently participating in any other Adjunctive Programs can be Presumptively Eligible for WIC.

<screen description – no audio> > 185% OF FEDERAL POVERTY GUIDELINES (STANDARD WIC)
and <= 275% OF FEDERAL POVERTY GUIDELINES (MHCP)

Overview 2

Presumptive Eligibility, or PE, gives families time to apply for a MN Health Care Program, either Medical Assistance or Medicaid or Minnesota Care and receive 3 months of WIC benefits while their application is pending.

Overview 3

PE households must be able to provide proof of income at the time of the certification.

Families providing self-reported income cannot be presumptive eligible.

We must have proof of income.

The family must also agree to apply for a MN Health Care Program.

We should note that even if the family has insurance through an employer, they can still apply for an MHCP and may be able to receive health care assistance.

Overview 4

Policy requires that we document PE in both an alert and a note.

The note must include household size, income amount, and the proof provided.

We must also enter the note into the folder for each member being certified as PE.

If we are also writing a Separation of Duties (SOD) – Income note, we can combine the PE and SOD information into the SOD-Income note.

If we are not writing an SOD-income note for the certification(s), we can just write a PE note.

<Transition Slide>

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

Scenario 1

We are the income assessor and are completing the income for Colly, a new pregnant woman, and May Flower, her two-year-old daughter.

Scenario 2

Colly has told us that she doesn't have a job and is currently living with her mom.

She brought her mom's W-2s, or tax forms, for proof of the household's income.

PARTICIPANT: "I don't currently have a job, so we moved back in with my mom. She gave me her tax forms from the past year."

WIC STAFF: Thank you for coming in today and bringing this information with you! I'm going to get your appointment started for today.

Scenario 3

She and her daughter do not have medical insurance and aren't participating in any other adjunctive programs.

We'll just jot down the income information: HH Size of 4 which includes her baby, \$68,529 per year and tax forms as proof.

PARTICIPANT: "We also don't have any medical insurance and I was told you can help with that?"

WIC STAFF: We'll make sure you have the website link so that you can apply for Medical Assistance and information about other programs that may help...

Add Income 1

Go ahead and add the income record. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the Add button.

Add Income 2

<no audio> Add the income record. Follow any cues that display. Click anywhere for a hint.

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

Add Income 3

<no audio> Add the income record. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Household Size is 4. Type 4.

Add Income 4

<no audio> Add the income record. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the Add button in the Itemized Income Information card.

Add Income 5

<no audio> Add the income record. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the Yearly tab.

Add Income 6

<no audio> Add the income record. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click into the Yearly Amt 1 field.

Add Income 7

<no audio> Add the income record. Follow any cues that display. Click anywhere for a hint.

<no audio> Do not type a comma in the dollar amount.

<audio – hint> Type: 68529

Add Income 8

<no audio> Add the income record. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the Proof of Income dropdown.

Add Income 9

<no audio> Add the income record. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Select Tax Form.

Add Income 10

<no audio> Add the income record. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the OK button.

Add Income 11

<no audio> Add the income record. Follow any cues that display. Click anywhere for a hint.

<audio – hint> Click the Save button.

Not Eligible Msg 1

If the income we enter is greater than the standard WIC income guidelines, this message displays indicating the participant is not eligible and will be terminated along with any other household members.

Not Eligible Msg 2

At this point, we want to assess for Presumptive Eligibility.

If the income is within the higher PE guidelines and the family is willing to apply for a MN Health Care Program, we click No on this message.

Go ahead and click the No button.

PE 1

MN WIC does NOT enter more than one income into the system.

If the household is Presumptively Eligible, we must delete the income record and document that information in our alert and note instead.

Let's delete the income.

Click the income row to highlight it, then click the Delete button.

PE 2

<no audio> Click the income row to highlight it, then click the Delete button.

PE 3

And click Yes.

<no audio> Click the Yes button.

PE 4

Since the household will ultimately be adjunctively eligible, we need to add an income record for the MN Health Care Plan they intend to apply for.

The Flowers are going to apply for MA.

Let's add an adjunctive record for MA, selecting the appropriate proof. Click anywhere for hints.

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

PE 5

<no audio> Add an adjunctive record for MA, selecting the appropriate proof. Click anywhere for hints.

<audio – hint> Click the Program dropdown.

PE 6

<no audio> Add an adjunctive record for MA, selecting the appropriate proof. Click anywhere for hints.

<audio – hint> Select MHCP-MA.

PE 7

<no audio> Add an adjunctive record for MA, selecting the appropriate proof. Click anywhere for hints.

<audio – hint> Click the Proof dropdown.

PE 8

<no audio> Add an adjunctive record for MA, selecting the appropriate proof. Click anywhere for hints.

<audio – hint> Select Presumptive Eligibility - 90 Day.

PE 9

<no audio> Add an adjunctive record for MA, selecting the appropriate proof. Click anywhere for hints.

<audio -hint> Click the Update button.

PE 10

<no audio> Add an adjunctive record for MA, selecting the appropriate proof. Click anywhere for hints.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

PE 11

By selecting the Presumptive Eligibility – 90 Day Proof we are assuming that the family will be adjunctively eligible for WIC and are providing the family with 3 months to apply and become enrolled in a MN Health Care Program.

We are **not** pending proof for someone already enrolled in MA or MN Care.

PE 12

We need to make sure we inform the participant or representative that they should apply for the MN Health Care Program as soon as possible and that we can issue 3 months of benefits today but will have to double-check their enrollment the next time we see them.

As the income assessor, we are also responsible for documenting PE in an alert and note.

Go ahead and open the Alerts page. Click anywhere for a hint.

<audio – hint> Click the Participant Menu (the participant’s name in the header).

Document PE 1

<audio – hint> Select Manage Alerts.

Document PE 2

The alert is essential since it informs the staff person assisting the family at their next nutrition visit to follow-up the PE and verify enrollment in the MN Health Care Program.

Let’s click Add.

<no audio> Click the Add button.

Document PE 3

We are going to make this a Priority alert. Toggle it on, then click the Subject dropdown.

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

Document PE 4

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

Document PE 5

Click below the scroll bar.

Document PE 6

There are two PE options.

We select PE (Presumptive Eligibility) to document the initial PE.

Go ahead and select it.

<no audio> Select PE (Presumptive Eligibility).

Document PE 7

We include everything in our alert that we have to include in our note because we're going to copy our alert to a note to save some time.

Let's grab our sticky with the income info we jotted down.

OK. Go ahead and click into the Alert Text field and we'll type the alert.

Document PE 8

Our note must include household size, the income amount, and the proof we verified.

Our alert might let the next staff person know the number of months we issued, what they are applying for, and when it should be verified.

Document PE 9

Go ahead and save the alert.

<no audio> Click the Save button.

Document PE 10

Our next step is to copy our alert to a note.

Go ahead and get that started.

<no audio> Copy the alert to a note.

Document PE 11

Click the Subject dropdown and then click below the scroll bar.

Document PE 12

<no audio> Click below the scroll bar.

Document PE 13

If we also have to write a Separation of Duties (SOD) - Income note, we should select that as our Subject.

If we don't have to write an SOD-Income note, as is the case here because we, as the income assessor entered the income for the certification, then we select the PE (Presumptive Eligibility) note.

Select our subject.

<no audio> Select PE (Presumptive Eligibility).

Document PE 14

We're certifying both Colly and May, so we want to copy the note to both of their folders.

Toggle on Copy then click Save.

Document PE 15

<no audio> Toggle on Copy then click Save.

<Transition Slide>

Just to verify...

<screen description – no audio> Slide transitions to Colly's Note's page.

Document PE 16

...the note in Colly's folder...

<Transition Slide>

...as well as in...

<screen description – no audio> Slide transitions to May's Note's page in her participant folder.

Document PE 17

...May's folder.

<Transition Slide>

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

Issue Benefits PE 1

Once the certifier completes the certifications and benefits are being issued either by the income assessor or the certifier, we issue tri-monthly benefits to our Presumptively Eligible households.

Next Module 1

In the next module, we'll review how to follow-up and document PE when the family returns for their next Nutrition Visit.

<Transition Slide>

<screen description – no audio> Slide transitions to Test Your Knowledge page.

Test Your Knowledge

T/F Q#1

True or False?

We must see proof of income if a family is going to be Presumptively Eligible.

Answer #1

The answer is True.

In order for a household to be Presumptively Eligible, we must review their income to ensure it is between the Standard WIC Guidelines and the MN Health Care Program Guidelines. We cannot accept self-declared income for PE.

T/F Q#2

True or False?

We should record both the traditional and adjunctive income records on the Income page for Presumptively Eligible households.

Answer #2

The answer is False.

MN WIC only ever records one income record or one adjunctive program.

For PE households, once they are determined over-income based on the Standard WIC Guidelines and to have income within the MN Health Care Program guidelines, we should delete the income record and document this information in an alert and note.

On the Income page, we should record the adjunctive program (MA or MNCare) the household has agreed to apply for and select Presumptive Eligibility – 90 Day as proof.

Multiple Choice Q#3

Which statement is NOT true?

For a household to be Presumptively Eligible...

- A. Their income must be more than 185% and less than or equal to 275% of the Federal Poverty level.
- B. They cannot have other medical insurance.
- C. They should not be participating in any other Adjunctive Programs.
- D. They must be willing to apply for one of the MN Health Care Programs (MA or MNCare) as soon as possible.
- E. None. All of these statements are true.

Answer #3

The answer is B.

Families that already have insurance can still apply for a MN Health Care Program and may be eligible for further health care assistance (such as helping to pay premiums, etc.).

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.

INCOME 4A – PRESUMPTIVE ELIGIBILITY

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