

Income 5A Part 1 – Over-income in Cert – 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 what to do if a household is determined to be income ineligible during a certification in WINNIE the MN WIC Information System.

Date

All dates in this module are based on today's date being October 26, 2023.

Overview 1

Household incomes change and when we reassess it at a certification, they may no longer meet the WIC or Presumptive Eligibility Income Guidelines.

Federal Regulations require that we provide written notification of ineligibility, including the reason why, and of their right to a fair hearing.

This information is provided in the Official Notification – Letter of Ineligibility.

Overview 2

Since, in general, income is household-level, WINNIE will also terminate the current certification of all other household members.

Federal Regulations require 15 days' notice of termination for those members in a current cert.

Any members with **more than** 90 days left in their certification are eligible to receive a half package of food benefits for those 15 days.

Any members with less than or equal to 90 days left can receive all their remaining sets of food benefits.

Overview 3

Along with meeting Federal Regulations and requirements, MN WIC policy also requires that we document ineligibility in other terminated household members' folders and offer Nutrition Education and Referrals, and document those as appropriate.

<Transition Slide>

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

Scenario 1

We are certifying Laurel today.

Click on Fern's card.

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

Scenario 2

Fern's cert ends in March, which is more than 90 days from today.

She has a Midcertification Assessment today.

Click on Hunter's card.

<no audio> Click on Hunter's card to view his details.

Scenario 3

Hunter's cert ends in December, which is less than 90 days from today.

He also has an MCA today.

Click on Kelly's card.

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

Scenario 4

Kelly is no longer certified.

Double-click on Laurel's card to open his Participant Folder.

<Waiting>

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

Alert 1

Review then close the alert.

Income Cert 1

Let's start the certification for Laurel.

Collapse Clinic Actions and start the cert.

Income Cert 2

<no audio> Collapse Clinic Actions and start the cert.

Income Cert 3

Make sure to read this message, then continue.

<no audio> Collapse Clinic Actions and start the cert.

<message – no audio> Benefits are still available for issuance to this participant during their current certification. Are you sure you want to continue?

Income Cert 4

<no audio> Collapse Clinic Actions and start the cert.

<Waiting>

<screen description – no audio> Spin icon displays.

Income Cert 5

We are the income assessor for this appointment.

Mom told us that her partner moved in, and they now had two incomes, but there are still only 5 because her eldest child is now living with his dad.

She isn't sure if they are still eligible but since Hunter is receiving special formula, she thought she'd check to make sure.

Go ahead and open the Income page.

PARTICIPANT: "My partner moved in a couple of months ago and we now have two incomes, but there are still only five of us because my 5-year-old is living with his dad."

PARTICIPANT: "I wasn't sure if we could still be on WIC, but since Hunter is getting Similac Alimentum and it's expensive, I thought I'd check to make sure."

WIC STAFF: Absolutely! I'm glad you came in today. Either way, we should be able to provide some food benefits.

<Waiting>

<screen description – no audio> Spin icon displays.

Income Cert 6

Mom has provided pay stubs for the last month, and we already jotted down the details.

She told us there were 5 in her household.

She gets paid \$1855.23 every other week and both her paychecks were the same.

Her partner was paid \$1982.35 on the first and \$2327.22 on the 15th.

Mom says her partner's second check is always about \$350 higher.

Go ahead and add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for a hint.

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

WIC STAFF (Income Assessor): Is your partner's second check usually higher?

PARTICIPANT: "Yeah. That second check is always about 350 more than the first."

Income Cert 7

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

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

Income Cert 8

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> The Household Size is 5. Type 5.

Income Cert 9

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

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

Income Cert 10

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Click the Bi-Weekly tab.

Income Cert 11

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Click into the Bi-Weekly Amt 1 field.

Income Cert 12

Don't use a comma when entering the income amount.

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Enter the income amount: 1855.23.

Income Cert 13

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

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

Income Cert 14

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Select Pay Stub.

Income Cert 15

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Click the OK button.

Income Cert 16

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

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

Income Cert 17

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Click the Twice Monthly tab.

Income Cert 18

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Click the Method dropdown.

Income Cert 19

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Select Variable.

Income Cert 20

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Click or tab into the Twice Monthly Amount 1 field.

Income Cert 21

Don't use a comma when entering the income amount.

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Enter the income amount: 1982.35.

Income Cert 22

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Click or tab into the Twice Monthly Amount 2 field.

Income Cert 23

Don't use a comma when entering the income amount.

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Enter the income amount: 2327.22.

Income Cert 24

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

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

Income Cert 25

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Select Pay Stub.

Income Cert 26

<no audio> Add this income record, adding the household size first and the income in the order we jotted down. Follow any cues that display. Click anywhere for hints.

<audio – hint> Click the OK button.

Income Cert 27

Their annualized income exceeds the guidelines for a family of 5, even using the higher Presumptive Eligibility (or PE) guidelines.

Go ahead and click the Save button.

Not Eligible Msg 1

This warning message informs us that based on the standard WIC income guidelines, the participant is not eligible and will be terminated.

At this point, we should also make sure to assess for PE, which we already have, and know isn't an option.

The second part of the message tells us that all other household members, if not individually adjunctively eligible, will be terminated.

Not Eligible Msg 1A

<screen description – no audio> Slide transitions to Confirm message: Benefits are still available for issuance to this participant during their current certification. Are you sure you want to continue?

Remember when we started the certification?

The system warned us that Laurel still had benefits available for his current cert.

If we let the system terminate Laurel, we will be unable to issue the last set of benefits to him.

Not Eligible Msg 1B

Federal Regs require we issue the remaining set of benefits allowed for their current certification period.

To be able to do that, we must click the No button on this message.

<no audio> Click the No button.

Exit Cert 1

Once we've informed the representative that the household is no longer income-eligible...click the button to continue...

Exit Cert 1A

We need to exit the cert without saving the income.

Go ahead and do that. Click anywhere for a hint.

<no audio> Exit Certification Mode without saving the income. Click anywhere for a hint.

<audio – hint> Click the red Close button in the header.

Exit Cert 2

<screen description – no audio> Confirm message: You have unsaved changes. Are you sure you want to leave?

<no audio> Exit Certification Mode without saving the income. Click anywhere for a hint.

<audio – hint> Click the Yes button.

<Waiting>

<screen description – no audio> Spin icon displays.

Remove Cert 1

Laurel's folder is locked, and Issue Benefits disabled, until we remove the certification.

Collapse Clinic Actions and remove the cert. Click anywhere for hints.

<no audio> Collapse Clinic Actions.

Remove Cert 2

<no audio> Remove the incomplete certification. Click anywhere for hints.

<audio – hint> Select Remove Incomplete certification from the bottom of the sidebar.

Remove Cert 3

<no audio> Remove the incomplete certification. Click anywhere for hints.

<audio – hint> Click the Yes button.

<Waiting>

<screen description – no audio> Spin icon displays.

Unlocked Folder

Our folder is unlocked, which isn't that obvious on this page, but Issue Benefits is enabled.

Next Module

There are still a number of steps left to completing the income ineligibility process and we'll continue our review, beginning with issuing benefits when a family has been determined income ineligible, in the next training module.

Click the button to continue.

Knowledge Test

T/F Q#1

True or False?

We should click the No button on the Warning message indicating a participant or household is over-income, and asking if we want to continue, if we haven't issued benefits yet.

Answer #1

The answer is True.

The Warning Message informs us that the participant and other household members will be terminated if over-income.

We must click No to be able to exit the certification without saving the income record (since saving the income would result in terminating the certified members) so that we are able to issue the remaining benefits we are required by the Federal Regulations to provide.

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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