

Income 5B Part 2 – Over-Income in Folder – 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 is a continued overview of what to do when a household is determined to be income ineligible after entering income into the Participant Folder in WINNIE the MN WIC Information System.

Date

All dates in this module are based on today's date being November 7, 2023.

Scenario Overview 1

In the last training module, we followed-up with Bristol England who was certified with pending proof as temporarily eligible.

When we entered the income into the Participant Folder, he was determined income ineligible.

We provided the written Official Notification and created an SOD-Income Note for the pending proof follow-up.

Scenario Overview 2

In this module, we'll complete the income ineligibility process for the household members who were currently certified and terminated as a result of the income ineligibility.

Reinstate 1

When Bristol was terminated, Chester and York were also terminated, but they are eligible for more benefits based on the number of days left in their certs.

Go ahead and open Chester's folder.

<audio – hint> Click the Participant Menu.

Reinstate 2

<no audio> Open Chester's folder.

<audio – hint> Select England, Chester from the Other Household Members list.

Reinstate 3

To be able to issue to Chester, we need to reinstate him.

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

<audio – hint> Click the Participant Menu.

Reinstate 4

<no audio> Reinstate Chester. Click anywhere for a hint.

<audio – hint> Select Reinstate Terminated Participant.

Reinstate 5

<no audio> Reinstate Chester. Click anywhere for a hint.

<audio – hint> Click the Yes button.

Reinstate 6

Once re-instated, Issue Benefits is re-enabled.

Based on Chester's Cert End Date, what benefits can we issue him?

- A half package.
- The rest of the sets of benefits he's eligible to receive.

<screen description – audio when button clicked> A half package – Incorrect. Click the button to continue.

<screen description – audio when button clicked> The rest of the sets of benefits he's eligible to receive. – Correct. Click the button to continue.

Reinstate 7

Go ahead and reinstate York.

<audio – hint> Click the Participant Menu.

Reinstate 8

<no audio> Reinstate York.

<audio – hint> Select England, York from the Other Household Members list.

Reinstate 9

<no audio> Reinstate York.

<audio – hint> Click the Participant Menu.

Reinstate 10

<no audio> Reinstate York.

<audio – hint> Select Reinstate Terminated Participant.

Reinstate 11

<no audio> Reinstate York.

<audio – hint> Click the Yes button.

Reinstate 12

Issue Benefits is re-enabled.

Based on York's Cert End Date, what benefits can we issue him?

- A half package.
- The rest of the sets of benefits he's eligible to receive.

<screen description – audio when button clicked> A half package – Correct. Click the button to continue.

<screen description – audio when button clicked> The rest of the sets of benefits he's eligible to receive. – Incorrect. Click the button to continue.

Issue Benefits 1

Re-instating termed members. Done.

Next, let's issue benefits.

<no audio> Select Issue Benefits from the sidebar.

Issue Benefits 2 (Waiting first)

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

Again, in this module, we'll touch on **what** we issue more than **how** we issue.

Click below the scroll bar.

Issue Benefits 3

Chester who has less than 90 days left in his cert will be issued the rest of his sets and York, who has more than 90 days left in his cert, will receive a half package.

Chester is good to go as-is but we have to correct York's suggested issuance.

Toggle off York's December set.

Issue Benefits 4

Which automatically toggles off the January set as well.

Go ahead and edit York's November benefits to provide a half package. Click anywhere for a hint.

<audio - hint> Click the Edit button.

Issue Benefits 5

Edit York's November benefits to provide a half package. Click anywhere for a hint.

<audio - hint> Click the Package Size dropdown.

Issue Benefits 5A

Edit York's November benefits to provide a half package. Click anywhere for a hint.

<audio - hint> Select ½ Package.

Issue Benefits 5B

Edit York's November benefits to provide a half package. Click anywhere for a hint.

<audio - hint> Click the Reason for Editing dropdown.

Issue Benefits 5C

Edit York's November benefits to provide a half package. Click anywhere for a hint.

<audio - hint> Click the Package Size dropdown.

Issue Benefits 5D

Edit York's November benefits to provide a half package. Click anywhere for a hint.

Issue Benefits 5e

Edit York's November benefits to provide a half package. Click anywhere for a hint.

<audio - hint> Click the Save button.

Issue Benefits 6

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

Click below the scroll bar.

Issue Benefits 7

York is good to go so we can issue benefits, which we'll do behind the scenes.

Issue Benefits 8

Benefits issued.

Click the Close button.

<screen description – no audio> Slide transitions to Aggregated Issuance modal with successful transmission banner.

Termination 1

Now that the benefits have been issued, we have to re-terminate York and Chester's certs.

Go ahead and do that. Click anywhere for hints.

<audio – hint> Click the Participant Menu.

Termination 2

<no audio> Re-terminate York and Chester's certifications. Click anywhere for hints.

<audio – hint> Select Manually Terminate Participant.

Termination 3

<no audio> Re-terminate York and Chester's certifications. Click anywhere for hints.

<audio – hint> Click the Termination Reason dropdown.

Termination 4

<no audio> Re-terminate York and Chester's certifications. Click anywhere for hints.

<audio – hint> Select Income No longer Meets Requirements.

Termination 5

We want to toggle on Generate Official Notification so that we can have the system document their ineligibility for us, taking care of another requirement.

Do that then click Save.

<no audio> Toggle on Generate Official Notification then click the Save button.

Termination 5A

<no audio> Toggle on Generate Official Notification then click the Save button.

Official Documentation 3

Again, the document automatically opens in a new tab on top of the WINNIE tab.

We don't have to do with anything with it, except close it, which returns us to WINNIE.

Go ahead and close the tab.

Termination 6

We need to do the same for Chester as well.

Open Chester's folder and manually terminate his cert due to over-income.

<no audio hints>

Termination 7, 7A-&D

<no audio> Open Chester's folder and manually terminate his cert due to over-income.

Termination 7E

<no audio> Generate Official Notification already toggled on.

<no audio> Open Chester's folder and manually terminate his cert due to over-income.

Official Documentation 4

The Document displays in a new tab and again, we can simply close it.

Termination 8

By reinstating and generating the Official Notifications, we've completed the last requirements except for Nutrition Education and Referrals.

However, before crossing off our documentation requirement, let's verify in notes.

<no audio> Select Manage Notes from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Documenting Ineligibility 2

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

As expected, the System Note was added when we generated the Official Notification in both York's and Chester's folders so we can cross of that documentation requirement as well.

<screen transitions to Chester's Notes>.

<Transition Slide>

<screen description – no audio> Slide transitions to Search page with Bristol's Show Details.

Show Details 1

Since all three were terminations, the Show Details reflects that for Bristol...

And then click on Chester's card...

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

Show Details 2

...for Chester..

Click on York's card...

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

Show Details 3

...for York.

This concludes our overview of income assessment and ineligibility in WINNIE.

Click the button to continue.

Test Your Knowledge

Multiple Choice Q#1

Which statement is true?

- A. If there are more than 90 days left in the certification, and the participant is deemed income ineligible, we should issue another set of tri-monthly benefits.
- B. If over-income when the income is entered into the Participant Folder, the participant's record displays the Ineligible Date and Ineligible Reason in the Status Information modal.

- C. If over-income when the income is entered into the Participant Folder, we must sign and date the Official Notification document.
- D. Documentation of ineligibility only needs to be entered into the household member's folder who was determined ineligible during the cert or was temporarily eligible and pending proof and subsequently determined ineligible.
- E. If over-income when the income is entered into the Participant Folder, the system auto-generates the Official Notification.

Answer #1

The answer is C.

Since a signature is not collected by the system when a participant or household is found over-income after entering an income record into the Participant Folder, we must sign and date the Official Notification being provided to the family.

Corrections to Other Answers:

A – If more than 90 days left, the participant can only receive 15 days-worth of benefits, or a half-package.

B – The participant's record displays a **Termination** Date and Reason if determined ineligible after entering the income record into the Participant Folder.

D – Documentation of ineligibility must be entered into **all** household members' folders whose certs were terminated.

E – The system does **not** auto-generate the Official Notification when the participant is found over-income after entering the income record into the Participant Folder.

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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