

Income 1A – Overview & Assessment – 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 income, specifically using the Copy Income to Current function, in WINNIE the MN WIC Information System.

Income Assessment & Separation of Duties (SOD)

Assessing income eligibility is part of the certification process.

To ensure program integrity, certifications should involve two staff members.

One to determine income eligibility.

We'll call them the income assessor in these modules.

And one to assess medical and nutritional risks or the certifier.

Either the income assessor or certifier can issue benefits.

This requirement is called Separation of Duties or SOD and is Policy 1.18 Separation of Duties to Assure Program Integrity.

One-Person Certifications and SOD

For some agencies, one person certifications are unavoidable and agency processes for ensuring integrity are in place.

Most of what follows in these income modules assume SOD is being completed by two-person certifications, but the basic system concepts are the same.

Agency Policies

We should be familiar with our own agency's process for meeting SOD requirements and must always follow our agency's policies.

Documenting Income

Ideally, income should be entered while in Certification Mode or into the Participant Folder on the **same date** as the certification.

<Transition Slide>

As we saw in Certification History...

<screen description – no audio> Slide transitions to Certification History page for Beau Vine.

Cert History 1

...WINNIE will accurately document the staff person that entered the income, whether in Cert Mode or the Participant Folder, as long as the income is entered on the same date as the certification.

<Transition Slide>

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

Documenting Income 2

We can also enter the income on a different date from the cert, and we'll walk through this option in these training modules.

We should note that income provided through a secure electronic means shouldn't be imported or scanned into the folder.

The information should be entered into or documented in WINNIE and the electronic file deleted as appropriate to meet policy privacy standards.

Income Page Overview

Date

All dates in this section of the module are based on today's date being October 19, 2023.

<Transition Slide>

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

Scenario 1

Conn Doe and Doris Shutte are being certified today and we are the income assessor for their appointments.

Let's take a look at Wynne's card.

Scenario 2

Wynne was certified on 7/21, which was 92 days ago.

Click on Doris' card.

Scenario 3

Doris' pregnancy certification ended on 9/30/23.

But she was also certified on 7/21, again 92 days ago.

Why are 92 days significant?

Well, let's take a look at Doris' income page.

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

<Waiting>

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

Alert 1

Close the alert.

Income 1

Select Income from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Income 2

The Income page is the same whether we are working in Certification Mode or the Participant Folder, except that like most Add functions, the Add button in the Participant Folder is disabled if the participant is not in a current certification period.

Income 2A

Although everything else is disabled, since today is within 92 days of the most recent household-level income record on 7/21, we **can** use the Copy Items to Current Income function.

Income 3

Our previous income records display in the Contacts panel.

The information to the right is the income record for the selected date.

Click the 7/25/2013 record to view that income.

<no audio> Click the 7/25/2013 record in the Contacts panel.

Income 4

Everything, including the Copy button, is disabled for previous income records more than 92 days old.

Go ahead and return to the 7/21 record again.

<no audio> Click the 7/21/23 record in the Contacts panel.

Copy 1

MN WIC can copy an income contact within 92 days of its Original Screening Date, which is why the Copy Items to Current Income button is enabled.

Copy 2

The date the income was first recorded displays in the Original Screening Date field and cannot be changed.

This is the date associated with the income contact and once it's more than 92 days in the past, it cannot be copied.

Copy 3

The Created Date is the same as the Original Screening Date for an income record that has not been copied.

Let's click the Copy Items to Current Income button.

Copy 4

When we click the Copy button, a new contact record with today's date displays in the panel and the Created Date for the record we are copying changes to the current date.

The Household Size field also becomes enabled, as does the Pending Proof toggle.

Pending Proof 1

Let's address the Pending Proof toggle first.

We should never copy an income that has pending toggled on, nor should we ever toggle on pending for a record we've copied.

Household Size 1

Next Household Size.

We must always assess and enter the correct Household Size for the new income record.

We won't go into how to determine household size in these modules.

That information can be found in the MN Operations Manual (MOM), Section 5.2.4.

Household Size 2

If there are any changes to the household size, we cannot use the Copy Items to Current Income function.

Household Size 3

Since MN WIC includes the pregnant woman's fetus, or fetuses, in the household count, any time we certify a pregnant woman, our household size should increase by at least one.

This means, when certifying pregnant women, we cannot use the Copy function.

Copy 5

Although in this example we are copying a record in the Adjunctive Eligibility card, we could also copy an itemized income.

<Transition Slide>

However, we cannot copy...

<screen description – no audio> Slide transitions to individual Adjunctive Eligibility for Noah Zark.

Copy 6

...Adjunctive Eligibility for SSI or TEFRA since they can only be applied to the individual.

<Transition Slide>

<screen description – no audio> Slide transitions back to Doris Shutte's income page.

Copy 7

Since we are certifying a postpartum woman and her infant, who was already counted when mom was pregnant, and we've verified with Doris that the household size is still 5, we can use this previous income record for today's appointment.

Go ahead and save the income record.

WIC STAFF 1: How many people do you share your home with?

PARTICIPANT: "It's the 4 of us plus Conn. So, 5 now."

Copy 8

Notice that the Original Screening Date for the 10/21/23 income contact continues to be 7/21/23.

Once it's more than 92 days, in this instance tomorrow, we will not be able to copy this 10/21 record because it's Original Screening Date is too far in the past.

SOD & Copy 1

Separation of Duties (SOD) requirements must be followed even if using the Copy Items to Current Income function.

We've entered the income record for today's certifications.

Let's close the folder by returning to the Search page and let our other coworker complete the certs.

<no audio> Select Search from the sidebar.

<Transition Slide>

As we learned in the Certification modules...

<screen description – no audio> Slide transitions to Demographics page for Conn Doe in Certification Mode.

Copy & Cert 1

...the CPA assessing for medical and nutrition risks will have to open the Income page for Certification Mode to recognize the income.

We are now working as another staff person (the CPA assessing for risks).

Go ahead and open the Income page.

<no audio> Select Income from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Copy & Cert 2

Once the page is opened, the checkmark displays.

Since the record was copied today, a delete icon displays next to the new record.

We should not delete income records unless we are the income assessor, and we made a mistake that needs to be corrected.

<Transition Slide>

When the cert has been completed...

<screen description – no audio> Slide transitions to Conn Doe's Certification History page.

Copy & Cert History 1

...the Certification History shows that two people completed the assessments for this cert.

Next Module

In the next module, we'll look at how we can use the Copy function to help meet SOD requirements.

<Transition Slide>

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

Test Your Knowledge

T/F Q#1

True or False?

We can use the copy function to copy any Adjunctive Eligibility programs as long as they are within the past 92 days.

Answer #1

The answer is False.

Although WINNIE may allow us to, we cannot copy any individual Adjunctive Eligibility, which are SSI and TEFRA, since they can only be applied to the individual household member.

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.

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