

Income 3D – No Proof of Income – 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 how to document when a family is unable to provide proof of income in WINNIE the MN WIC Information System.

Date

All dates in this module are based on today's date being November 22, 2023.

Overview 1

In rare instances, families may be in a situation whereby they have an income, but they are unable to provide any proof of income when being certified.

We use the Multi-purpose Affidavit to document when this occurs.

We also must scan or import the affidavit into all members' folders who are being certified.

<Transition Slide>

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

Scenario 1

We are the income assessor for Cindie Rella who is breastfeeding, and her infant Gus Guss, both of whom were just prescreened.

We've started the certification for Cindie and opened the Income page.

Scenario 2

When we ask Cindie about her income and insurance.

Cindie lives with her stepmother.

Her stepmother provides medical insurance through her employer.

Other than that, Cindie pays rent and part of the utilities to her stepmother and she buys her own groceries.

WIC STAFF: Can you tell me about...?

PARTICIPANT: “I live with my stepmother and am on her medical insurance through her work.”

PARTICIPANT: “But otherwise, I pay rent to her and part of the utilities and buy my own groceries.”

Scenario 3

Cindie tells us that she works odd jobs for cash that she finds on the student boards at school, so she doesn't have any proof of income.

She tries to make at least \$300 per week to cover her expenses and doesn't usually make more than that.

Let's get started by adding the new income contact and household size of 2.

<no audio> Add the new income contact and household size of 2.

WIC STAFF: How do you...?

PARTICIPANT: “I work odd jobs for cash that I find on the student boards at school, so I don't have paychecks or anything like that.”

PARTICIPANT: “My goal is to make \$300 per week to cover everything but that's the most I usually make each week.”

No Proof 1-2

<no audio> Add the new income contact and household size of 2.

No Proof 3

We are adding a weekly income of \$300. Go ahead. Click anywhere for a hint.

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

No Proof 4

<no audio> Add 300 per week. Click anywhere for a hint.

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

No Proof 5

<no audio> Add 300 per week. Click anywhere for a hint.

<audio – hint> Type 300.

No Proof 6

Although we don't have proof, we still must select from the dropdown.

Click the dropdown.

<no audio> Click the Proof of Income dropdown.

No Proof 7

Policy requires that we document no proof of income using the Multipurpose Affidavit, a type of waiver.

So, we are going to select Waiver Signed as our proof.

Select Waiver Signed and click OK.

No Proof 8

<no audio> Select Waiver Signed and click OK.

No Proof 9

Save the income record.

<no audio> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

No Proof 10

Our next step is to complete the affidavit.

Do you remember where to find that? Click anywhere for a hint.

<no audio> Open the Multipurpose Affidavit. Click anywhere for a hint.

<audio – hint> Select Documents from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Affidavit 1

Notice that we are no longer in Cert mode or Cindie's folder since selecting from Clinic Actions always exits the folder.

Go ahead and select then generate the Multipurpose Affidavit.

Affidavit 2

<no audio> Select then generate the Multipurpose Affidavit.

Affidavit 3

<screen description – no audio> Affidavit displays then slide transitions to display browser tab.

Affidavit 4

If we have an electronic means to sign the affidavit, we can use that and then import it into WINNIE.

Or we can print it, fill it out, and scan the document.

Either way, we must ensure the document is saved to all members' folders that are being certified today.

We're going to print it. Go ahead and click the button.

<no audio> Click the Print icon.

Affidavit 5

The document is sent to our agency's network printer.

Click Print.

Affidavit 6

Close this browser tab to return to WINNIE.

<no audio> Close the browser tab.

<Transition Slide>

<screen description – no audio> Slide transitions to WINNIE without browser tabs.

<Transition Slide>

<screen description – no audio> Slide transitions to printed Multipurpose Affidavit.

Affidavit 7

The Multipurpose Affidavit should be completed after reviewing the Rights and Responsibilities with the participant or representative, along with the purpose for this document.

Affidavit 8

We should complete the Household Information section with the date, Household ID, and State WIC ID(s), and can choose to either complete the Waiver of Proof section or have the participant or representative complete that section before they sign the document.

<Transition Slide>

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

Affidavit 9

The last step is to insert the signed document into the appropriate members' folders.

Return to the search page.

<no audio> Select Search from the sidebar.

Scan/Import 1

Double-click on Gus's card to open his folder.

<Waiting>

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

Scan/Import 2

Regardless of whether we scan or import...where do we go? Click anywhere for a hint.

<audio – hint> Select Document Imaging from the sidebar.

Scan/Import 3

Depending on our agency, we may scan or upload the waiver as an electronic document.

Click Scan or Upload File depending on whichever process seems more likely for your agency.

- Select Scan – go to Scan 1
- Select Upload File – go to Upload File 1

Scan Document

<Waiting>

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

Scan 1

SWIPE is already on, and we've inserted the document front side down and document title first into the scanner.

Click Scan.

<no audio> Click the Scan button.

Scan 2

Click the Document Type dropdown.

Scan 3

The only type that really applies is Cert Info/Nutrition Education.

Select that.

<no audio> Select Cert Info/Nutrition Education

Scan 4

Click into the Description field and type: Signed Waiver-ID

Scan 5

<no audio> Click into the Description field and type: Signed Waiver-ID

Make sure to type it exactly as shown.

Scan 6

Click Save.

<no audio> Click the Save button.

<Waiting>

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

Upload File

Upload File 1

Click the Choose File button.

Upload File 2

In general, this type of document should be stored in the Downloads folder.

Double-click on it to open the file.

Upload File 3

Click the Document Type dropdown.

Upload File 4

The only type that really applies is Cert Info/Nutrition Education.

Select that.

<no audio> Select Cert Info/Nutrition Education

Upload File 5

Click into the Description field and type: Signed Waiver-ID

Upload File 6

<no audio> Click into the Description field and type: Signed Waiver-ID

Make sure to type it exactly as shown.

Upload File 7

Click Save.

<no audio> Click the Save button.

<Waiting>

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

Adding to Other Members' Folders

Scan/Import 4

Now we need to add it to Cindie's folder as well.

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

<no audio> Add the waiver to Cindie's folder. Click anywhere for a hint.

<audio hint> Click the row to select it.

Scan/Import 5

<no audio> Add the waiver to Cindie's folder. Click anywhere for a hint.

<audio hint> Click the Copy Document button.

Scan/Import 6

<no audio hint>

Scan/Import 7

<audio – hint> Click the Save button or press the Enter key.

Scan/Import 8

As a double-check...

<screen description – no audio> Slide transitions to Cindie's Document Imaging page.

Scan/Import 9

...Cindie is good to go too.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

We must select **Waiver Signed** as the Proof of Income if the household is unable to provide proof of income when being certified.

Answer #1

The answer is True.

The only applicable Proof of Income if the household cannot provide it when being certified is the Waiver Signed option.

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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