Income Ineligible in CGS (Over-Income) Script

Introduction

This HuBERT on-demand training module…

Intro1

… is provided by the MN Department of Health WIC Program. It provides an overview of what to do if a participant is not income eligible or is over-income for WIC.

Overview

On occasion, a household's income circumstances may change so that when we reassess the income at a certification appointment, they may no longer be income eligible for WIC.

When this occurs, HuBERT automatically terminates all household members' certifications.

However, per Federal guidelines, those terminated household members are still eligible to receive some food benefits based on whether there are 90 days left in their certification period.

If a household member has more than 90 days in their cert period they are eligible to receive food benefits for 15 days, which is usually a half-package.

15 is the number of days required for notification of termination.

Why this partial package was issued must be documented in a note.

If they have less than 90 days, they are eligible to receive their remaining sets of food benefits.

Overview 1

For the participant being certified, if they are still eligible to receive a set of benefits through the regular issuance process, we'll want to issue that set to them.

An Ineligibility Letter will automatically print as part of the determination of ineligibility during the Cert Guided Script.

We will need to write the names of all other terminated household members on it, and document that it was provided, and why, in a general note for all household members.

In this module…

In this module, we will touch on screens and processes in HuBERT that are discussed in later training modules, such as Health Information and Benefit Issuance. The concepts, such as needing to update

Health Information and issue benefits, are the focus as opposed to the processes. We will have a better understanding of the screens and processes in HuBERT once we've reviewed the applicable training modules.

<display> Overview slide transitions to Participant List screen.

Scenario

Today is April 22nd.

Minnie has just turned one a couple of days ago and has an appointment to be recertified.

Let's look at Mama's info.

<no audio> Click on Mama's row to view her Show Details.

Mama is still breastfeeding Minnie and her cert ends on the last date of this month.

Next, let's take a look at Max.

<no audio> Click on Max's row to view his Show Details.

Scenario 1

Max's cert doesn't end for another 5 months.

Go ahead and double-click on Minnie's row to open her folder.

<no audio> Double-click on Minnie's row to open her Participant Folder.

Cursor

<cursor spins>

Open CGS

Go ahead and start Minnie's certification.

<no audio – failure hint> Click the **Certification** icon (blue certificate).

Valid Benefits Msg

This message is indicating that Minnie still has benefits that could be issued for her current certification period. Since we can issue them once we've completed the cert, we can generally ignore it. However, for this scenario, where we won't be completing the cert, it's an important message.

We would like to continue with the cert, so click the **No** button.

<no audio> Click the **No** button.

CGS

We want to enter the income. Go ahead and open the income screen.

<no audio – failure hint> Click the **Demographics** link.

Open Calculator

<no audio – failure hint> Click the **Income Calculator** icon in the *Yearly Income* section.

Income Scenario

<slide transitions upward>

Mom has brought her W2. She is the sole income provider, and got a raise about 7 or 8 months ago.
Her parents live with her, helping out with the children, so there is a total of 6 people in the household.

Add Item

Her W2s indicate she made a gross income of $102,522.00 last year.

Go ahead and add her income and then her household size, saving the income when done.

<no audio – failure hint> Click the **Add Item** button.

Yearly

<no audio – failure hint> Click the **Yearly** radio button.

<no audio – failure hint> Click or tab into the **Amount per Year** field.

Amount

<no audio – failure hint> Enter the yearly amount of 102522.

Proof

<no audio – failure hint> Click the **Proof of Income** drop-down.

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar.

<no audio – failure hint> Enter the yearly amount of 102522.

<no audio – failure hint> Click **OK** or press the Enter key.

HH Size

<no audio> Double-click inside the **Household Size** field.

<no audio – failure hint> Household Size = 6.

Save Income

<no audio – failure hint> Click **OK** or press the Enter key.

Guidelines

We've seen this message before.

With a household size of 6, HuBERT will assess this income as over the eligible limit based on the WIC Standard Income Guidelines.

We also need assess Presumptive Eligibility.

And we can see that her income is also too high for PE.

Over-income Msg

The message also warns us that all members will be terminated.

At this point, in the CGS, we want to click the **NO** button on the message even though the income is correct.

The reason is two-fold. Remember the message that informed us Minnie could still be issued a set of benefits for her current cert?

Well, if we click Yes on this message, we will be unable to issue benefits for the member being certified, which in this case, is Minnie. And per Federal Regs, we can still issue some benefits to the other household members before they are terminated.

Go ahead and click No.

<no audio> Click the **No** button or press the Enter key.

No Save

We will need to Cancel out of this screen…

<no audio> Click the **Cancel** button.

Cancel Demo

…as well as out of Demographics.

Close CGS

We have to close the CGS, not end the cert.

<no audio> Click the **Close Certification** icon.

Locked PF

Since we started a cert without finishing it, the Participant Folder is locked, or disabled.

To unlock it, we need to remove the incomplete certification. Remember how to do that? Go ahead. Click anywhere if you need a hint.

<no audio – failure hint> Click the **Certification** menu.

<no audio – failure hint> Select **Remove Incomplete Certification.**

Remove Cert

<no audio – failure hint> Click the **Yes** button.

Disabled Icon

We want to issue benefits before terminating the household for over-income.

But, the Issue Benefits icon is disabled.

In order to re-enable it, we need to close Minnie's folder and re-open it. Go ahead and do that.

<no audio – hint after 5 seconds> Click the **Close Participant Folder** icon (yellow folder with purple arrow) or the X in the far right corner of the title bar.

Open PF

<no audio – hint after 5 seconds> Double-click on Minnie's row in the Participant List or click the Open Participant Folder icon.

Cursor

<cursor spins>

Issue Icon

Go ahead and click the Issue Benefits icon now that it is enabled.

<no audio> Click the **Issue Benefits** icon>

Benefits Msg

As we'll learn in the Benefits Management modules, the system performs validations to assess issuance eligibility and displays messages informing us of anything that must be updated before it can suggest benefits.

We'll also learn to be proactive and that if there are breastfeeding infants, we will need to update their Breastfeeding status in Health Information before being able to issue benefits.

However, in this instance, if we were to do that by canceling out of this screen…

<display only> Red cursor moves to Cancel button and clicks on it.

Open HI

…and clicking the Health Information tab…

<no audio> Demographics screen displays.

<display only> Red cursor moves to Health Information tab and clicks on it.

Health Info

<Display only> More detailed information about breastfeeding checkboxes will be provided in the Benefit Management modules.

…since Minnie is still breastfeeding and is over one year old, we would have to select the Breastfeeding beyond One Year checkbox…

<display only> Red cursor moves to Breastfeeding beyond One Year checkbox and clicks it.

Term BF Msg

…and we would get this message informing us that the system will auto-terminate Mama's cert, which would result in us not being able to provide Mama with her last set of benefits.

Issuance

<slides transition back to Issue Benefits screen>

So, first we have to issue to Mama before updating Minnie's breastfeeding information. And we might as well issue to Max also.

Remember, issuance is based on the number of days left in each member's cert period.

If less than 90 days, like Mama, whose cert ends at the end of this month, we can issue their remaining sets of benefits.

If more than 90 days, a household member, like Max whose cert ends in about 6 months, is only eligible to receive a half package.

Edit Set

This means that we need to edit Max's first set to a half package.

Follow the steps that display on the screen to do this.

 <Display only> More detailed information about editing sets will be provided in the Benefit Management modules.

<no audio> Click on the first set of benefits to highlight it and enable the **Edit First Set** button.

Edit Set 1

<no audio> Click the **Edit First Set** button.

Edit Set 2

<no audio> Click the **Edit First Set** button.

<no audio> Click the **Reason for Editing** drop-down.

<no audio> Select **CPA Discretion (See Notes).**

<no audio> Click **OK** or press the Enter key.

Issue Ben Sets

<display on screen> More detailed information about issuing benefits to the WIC Card will be provided in the Benefit Management modules.

Next, let's issue the benefits. Again, follow the steps…

<no audio> Click the **Issue Benefits to Selected Members** button.

Send EBT Data

<display> Status: Awaiting Command…

<no audio> Click the **Send EBT Data** button.

<cursor spins>

<display> Status: Issuance Received. Success!

<no audio> Click **Close** or press the Enter key on the keyboard.

Minimize

Since we decreased the size of Max's food package and selected CPA Discretion (see notes) as the reason, we need to write a note in Max's folder.

Go ahead and minimize Minnie's folder…

<no audio> Click the Minimize icon.

Open PF 1

…and open Max's.

<no audio> Double-click on Max's row to open his Participant Folder.

Cursor

<cursor spins>

Add Note

We are going to write a general note about Benefit Issuance. Go ahead and get it started.

Click anywhere for a hint.

<no audio – failure hint> Click the **Manage Notes** icon (the yellow sticky note with settings wheel).

General Note

<no audio – failure hint> Click the **Add General Note** button.

Note Subject

<no audio – failure hint> Click the **Subject** drop-down.

<no audio – failure hint> Select **Benefit Issuance**.

Click inside the text field and we'll quickly type our note.

<no audio> Click inside the **Note Text** field.

Type Note

<Typed note: ½ package issued due to household terminated for over-income.>

Save Note

Save the note and close Manage Notes.

<no audio – failure hint> Click OK or press the Enter key.

Close Notes

<no audio> Click the **Close** button.

OK. Mama and Max are taken care of. Now we need to issue benefits to Minnie.

To do that, we must first update her breastfeeding status in Health Information.

<no audio> Click the **Health Information** tab.

BF Info

Go ahead and click the **Breastfeeding beyond One Year** checkbox since Minnie is over a year old and breastfeeding.

<no audio> Click the **Breastfeeding beyond One Year** checkbox.

Term BF Msg 1

Again, the message informs us that mom's cert will be terminated. Since we already issued Mama's benefits, we can go ahead and click Yes.

<no audio> Click Yes or press the Enter key.

BF Verified

Next, we need to update the Date Breastfeeding Verified to today's date.

<no audio> Click the **Date Breastfeeding Verified** drop-down.

<no audio> Click the **Today** button.

Supp Feeding

The system will also require us to complete the **Date Supplemental Feeding Began.** Since our mom never provided formula, we are just going to type today's date into the field.

<no audio> Click into the **Date Supplemental Feeding Began** field.

<no audio> Type: 4/22/20

Issue Icon 1

And now we are ready to issue benefits to Minnie as well.

<no audio> Click the **Issue Benefits** icon.

Save HI Msg

<no audio – failure hint> Click Yes or press the Enter key.

Cursor

Issue Ben Sets 1

Since Minnie's cert ends at the end of this month, we can issue her remaining benefit set to her.

Start Cert Again

OK. We are now ready to start Minnie's cert again and re-enter her income. Go ahead and do that. Click anywhere if you get stuck and need a hint.

<no audio – failure hint> Click the **Certification** icon (blue certificate).

Start Cert Msg

<no audio – failure hint> Click the **Yes** button.

Open CGS Demo

<no audio – failure hint> Click the **Demographics** link.

Open Calculator

<no audio – failure hint> Click the **Income Calculator** icon in the *Yearly Income* section.

Add Item 1

Add her income and then her household size. Save the income when done.

<display – on sticky note: W2; HH size 6; $102522/yr>

<no audio – failure hint> Click the **Add Item** button.

Yearly 1

<no audio – failure hint> Click the **Yearly** radio button.

<no audio – failure hint> Click or tab into the **Amount per Year** field.

Amount 1

<no audio – failure hint> Enter the yearly amount of 102522.

Proof 1

<no audio – failure hint> Click the **Proof of Income** drop-down.

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar.

<no audio – failure hint> Enter the yearly amount of 102522.

<no audio – failure hint> Click **OK** or press the Enter key.

HH Size

<no audio> Double-click inside the **Household Size** field.

<no audio – failure hint> Household Size = 6.

Save Income

<no audio – failure hint> Click **OK** or press the Enter key.

Term Msg

This time we are going to click Yes. The income is correct and it's OK to terminate all household members.

<no audio> Click the **Yes** button.

Finish Demo

We will need to complete the required field in Demographics..

Then click OK.

<no audio> Click the **OK** button.

Ineligible Msg

The Mark Applicant as Ineligible message displays indicating Minnie has been determined ineligible during the certification for being over income.

The **Create Ineligibility Notice** checkbox is default-selected so that the system will automatically print an ineligibility letter when we click OK on this message.

Go ahead and do that.

<no audio> Click OK or press the Enter key.

Capture Sig

The system captures our signature as the staff member who has verified the accuracy of the information and made the final eligibility/ineligibility determination.

<no audio> Click the **Capture Electronic Signature** button.

Capture Sig 1

Capture Sig 2

<no audio> Click the **Save Signature** button.

Ineligibility Letter

The Notice of Ineligibility lists private information including the participant's name, address, telephone, and income.

We are going to write Mama's and Max's name on it as well.

The letter should be provided to the participant during the appointment.

 Read through the letter and click when ready to continue.

Document in Notes

One of the policy requirements when providing an ineligibility Letter is that it is documented in notes. Since we need to document it in all three folders, we are going to do a shortcut and create an alert to save as a note.

Go ahead and get us started by opening Alerts.

<no audio – failure hint> Click the **Manage Alerts** icon (yellow triangle with exclamation point).

Alerts

And let's add our alert.

<no audio> Click the **Add** button.

<no audio> Click inside the **Alert Text** field.

<display> Ineligibility Letter provided due to over-income.

<no audio> Click OK or press the Enter key.

Now let's copy it a to a note.

<no audio> Click the **Copy Alert to Note** button.

Our subject is Income Information. Go ahead and select it from the drop-down.

<no audio> Click the **Subject** drop-down.

<no audio> Click below the scroll bar.

<no audio> Click below the scroll bar.

<no audio> Select **Income Information.**

Select Participants

We want to save this note to Mama's and Max's folder as well. Select them from the Participants grid.

<no audio> Click the **Include** checkbox in Mama's row to insert a checkmark.

<no audio> Click the **Include** checkbox in Max's row to insert a checkmark.

And click OK to save our note.

<no audio> Click OK or press the Enter key.

Delete Alert

Last step is to delete our alert since we don't need it.

<no audio> Click the **Delete** button.

<no audio> Click the **Yes** button.

<no audio> Click the **Close button.**

Verify Notes

We don't verify that the note exists, but since this is a training module, we will.

Click on the Manage Notes icon.

<no audio – failure hint> Click the **Manage Notes** icon (yellow sticky note with settings wheel).

And we can assume, and rest assured, that the note is also in Mama's and Max folders as well.

Click close to exit the notes.

<no audio> Click the **Close** button.

Next, let's take a look at the Certification History tab.

<no audio> Click the **Certification History** tab.

Cert Hx

For our cert attempt today, it displays Over-income.

In the Demographics, AdditionalInfo2 tab…

<no audio> Click the **Demographics** tab.

<no audio> Click the **AdditionalInfo2** tab.

…it displays Over Income as the Ineligibility Reason and the Ineligibility Determined Date.

One last thing, let's close Minnie's folder and take a look at Show Details in the Participant List.

<no audio> Click the **Close Participant Folder** icon.

Participant List

Minnie doesn't have any cert information since she was determined ineligible.

While Mama…

<no audio> Click on Mama's row.

…shows the Termination Date of today and Termination Reason – Income No Longer Meets Requirements, just like Max.

<no audio> Click on Max's row.

Transition Slide

<display> Transition from Participant List to End Slide.

End

Thank you for reviewing this HuBERT on-demand training module presented by the MN Department of Health WIC Program.