

Income 4B – Presumptive Eligibility Follow-up – 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 documenting the Presumptive Eligibility, or PE, follow-up in WINNIE the MN WIC Information System.

Date

All dates in this module are based on today's date being November 20, 2023.

Overview 1

When a family is Presumptively Eligible, we must verify their current enrollment in one of the MN Health Care Programs (MHCPs), which are Medical Assistance or MN Care, and document the follow-up at their next Nutrition Visit.

Overview 2

We are required to document both the PE follow-up as well as an SOD-Income note to provide the auditable record ensuring we followed SOD requirements and someone other than the certifier verified the PE follow-up.

Again, we can combine the information into one note.

However, we can choose to write either a PE Update note, or an SOD-income note, and should follow our agency's guidelines.

As always, we add the follow-up note for each member certified as PE.

<Transition Slide>

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

Scenario 1

Sue and Callie Perr have a Nutrition Visit today and we are preparing for their appointment.

Callie was certified in August as presumptively eligible, based on the Priority Alert, and received three months of benefits.

Click on Sue's card.

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

Scenario 2

The information is the same for Sue.

Double-click to open Sue's folder.

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

<Waiting>

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

Alert 1

Based on the alert, we were their income assessor for their cert.

Since we were not the certifier, we can verify and document their enrollment in MA, which is the program indicated by the alert.

Using the online system, we are able to that they are currently enrolled in MA.

Alert 2

Since this alert is no longer applicable, we want to make sure to delete it.

Delete the alert then close the alert modal.

Alert 3-4

<no audio> Delete the alert then close the alert modal.

PE FU 1

The Presumptive Eligibility priority alert info in the header will resolve once we open another page.

We resolve PE by entering a new income record.

Open the income page.

<no audio> Select Income from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

PE FU 2

Go ahead and add the new income record: HH Size of 5, Medical Assistance, verified using the online system.

Click anywhere for hints.

<audio – hint> Click the Add button.

PE FU 3

<no audio> Add the new income record: HH Size 5, MA, online system.

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

PE FU 4

<no audio> Add the new income record: HH Size 5, MA, online system.

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

PE FU 5

<no audio> Add the new income record: HH Size 5, MA, online system.

<audio – hint> Click the Add button in the Adjunctive Eligibility card.

PE FU 6

<no audio> Add the new income record: HH Size 5, MA, online system.

<audio – hint> Click the Program dropdown.

PE FU 7

<no audio> Add the new income record: HH Size 5, MA, online system.

<audio – hint> Select MHCP-MA.

PE FU 8

<no audio> Add the new income record: HH Size 5, MA, online system.

<audio – hint> Click the Proof dropdown.

PE FU 9

<no audio> Add the new income record: HH Size 5, MA, online system.

<audio – hint> Select Phone/System Verification.

PE FU 10

<no audio> Add the new income record: HH Size 5, MA, online system.

<audio -hint> Click the Update button.

PE FU 11

<no audio> Add the new income record: HH Size 5, MA, online system.

<audio – hint> Click the Save button.

<Waiting>

<screen description – no audio> Spin icon displays.

PE FU 12

Adding the new income record is half the required documentation.

The other half is documenting the resolution for all members certified as PE in either a PE Update or SOD-Income Note.

Let's create an alert and copy to a note.

<no audio> Select Manage Alerts from the sidebar.

Document PE FU 1

Click the Add button.

Document PE FU 2

We're creating the alert as a shortcut for our note and then we'll delete it.

Because of this, we aren't going to bother selecting a Subject.

Click into the Alert Text field and we'll quickly type the alert.

Document PE FU 3

We're going to write that PE was resolved and that they are enrolled in MA, which we verified using the online system.

<screen description – no audio> ALERT TEXT: PE Resolved. Enrolled in MA per online system verification.

Document PE FU 4

We are keeping this very general, but best practice is to always be as specific as possible in our documentation.

Go ahead and click Save.

Document PE FU 5

Let's copy it to a note.

<no audio> Click the Copy to Note button.

Document PE FU 6

Click the Subject dropdown, then click below the scroll bar.

<no audio> Click the Subject dropdown.

Document PE FU 7

<no audio> Click below the scroll bar.

Document PE FU 8

For our follow-up, we can write either a PE Update or Separation of Duties (SOD)-Income Note as long as we are meeting the documentation requirements, which are that we indicate how we resolved PE and that someone other than the certifier has verified and documented the PE resolution.

Following our agency's guidelines, we're going to write a PE Update note.

<no audio> Select PE Update.

Document PE FU 9

Toggle on Copy, then click Save.

Document PE FU 10

<no audio> Toggle on Copy, then click Save.

Document PE FU 11

Delete the alert since we no longer need it.

Document PE FU 12

<no audio> Delete the alert.

Document PE FU 13

Since this is a training module, let's go ahead and verify the note in Sue's folder.

<no audio> Select Manage Notes from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Document PE FU 14

Click the button to continue.

<Transition Slide>

<screen description – no audio> Slide transitions to Callie's Notes page.

Document PE FU 15

The rest of the Nutrition Visit is as usual.

<Transition Slide>

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

Pending PE 1

In some instances, enrollment in a MN Health Care Program may be pending at the next Nutrition Visit.

If we can verify the family has applied and their enrollment is pending, they can be issued an additional 3 months of benefits.

After the second issuance, the family must be enrolled in an MHCP before any more benefits can be issued.

Pending PE Documentation 1

We follow the same documentation requirements as for resolved PE follow-ups.

We create an alert to inform future staff of what we issued today and that the family must be enrolled at the next Nutrition Visit to receive any more benefits.

We add a PE Update note indicating status at this nutrition visit, which must be written by staff other than the certifier to meet Separation of Duties requirements.

<Transition Slide>

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

Scenario 2-1

Viola Solo was certified in August as Presumptively Eligible and issued 3 months of benefits.

Double-click on Viola’s card to open her Participant Folder.

<Waiting>

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

Alert 2-1

The original PE alert informs us she is PE, applying for MA, and that 3 months of benefits were issued.

We can see this was written by one of our other coworkers.

This alert is no longer applicable and we’re going to create a new one, so let’s delete it then close the alert modal.

<no audio> Delete the alert then close the alert modal.

Alert 2-2 and 2-3

<no audio> Delete the alert then close the alert modal.

Verify Certifier 1

We are a large enough agency that we may not remember if we performed the cert.

What page should we view to see who completed the certification in August? Go ahead. Click anywhere for a hint.

<no audio> What page should we view to identify the August certifier? Click anywhere for a hint.

<audio – hint> Select Certification History from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Verify Certifier 2

Our other coworker completed both the cert and the income, which means there must be an SOD-income note written in August by the income assessor.

Regardless, we can be the income assessor for the PE Update and when verifying her enrollment, the online system indicates Viola's application is still pending.

We need to create an alert and can copy it to a note, as well as explain to the participant that we will be issuing 3 more months but that she will need to be actively enrolled in MA next time for us to be able to issue any more benefits.

Go ahead and add the alert.

<audio - hint> Select Manage Alerts..

WIC STAFF: Since I didn't certify Viola, I can do the PE Update today.

WIC STAFF: Her application is still pending... I'm going to have to create a new alert and note.

WIC STAFF: Your MA is still pending but we can issue benefits again for 3 months today.

When we see you again in February, you'll need to be actively enrolled in MA for us to be able to issue any more.

Document Pending 1

<no audio> Add the alert.

<audio – hint> Click the Add button.

Document Pending 2

Again, this will be a priority alert.

<no audio> Toggle on Priority.

Document Pending 3

Click the Subject dropdown then click below the scroll bar.

<no audio> Click the Subject dropdown.

Document Pending 4

<no audio> Click below the scroll bar.

Document Pending 5

This time, we want to select PE Update as our alert subject.

Document Pending 6

Click into the Alert Text field and we'll write our alert.

Document Pending 7

We want to include anything a future staffer should know, as well as meet documentation requirements for our note.

So, we'll indicate we verified MA using the online system and that it's still pending; that we issued 3 more sets of benefits today; to verify MA is active at the February Nutrition Visit; a reminder that no more benefits can be issued if Viola isn't enrolled in February; and that we've explained this to Viola.

Go ahead and click Save.

Document Pending 8

Let's copy it to a note. Click anywhere for a hint.

Document Pending 9

<no audio> Copy the alert to a note. Click anywhere for a hint.

<no audio> Click the Subject dropdown.

Document Pending 10

Click below the scroll bar.

Document Pending 11

<audio - hint> Our subject is PE Update.

Document Pending 12

<audio – hint> Only Viola was certified so we are only going to copy the note to her folder. Click the Save button.

Document Pending 13

Since we're training, we verify the note. Go ahead.

<no audio> Select Manage Notes from the sidebar.

<Waiting>

<screen description – no audio> Spin icon displays.

Document Pending 14

Yep. We're good to go.

When we issue benefits...

Select Issue Benefits from the sidebar.

<Waiting>

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

Issue Benefits 1

...we can provide 3 sets of benefits for this pending PE.

Click the button to continue.

Test Your Knowledge

T/F Q#1

True or False?

We can write either a PE Update or SOD-Income note when following up on PE as long as documentation requirements for both are met.

Answer #1

The answer is True.

At the initial PE, we must write an SOD-Income note as part of the audit process for certifications.

However, when following up PE at the next Nutrition Visit, we can write either a PE Update or SOD-Income note as long as the person who verifies and documents the follow-up PE is someone other than the certifier and we include how the PE was resolved.

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.

INCOME 4B – PRESUMPTIVE ELIGIBILITY FOLLOW-UP

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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