Certifying a Participant – Frontline
Effective August 2023

Eligibility Determination (Proofs required: Income, ID, and Residency):
Proofs must be reviewed at time of service
Refer to PM CS 5.2 for physical presence exceptions
Review *PPS Secure and Confidential Communications with WIC Participants* if proofs are obtained prior to WIC appointment

Step 1
State Search
	1. **Explain** to participant what to expect (certification/re-cert appointment and length of time).
	    a. If <u>existing</u> record is found: select that record. Move to **Step 2 Record Found** below.
	    b. If <u>no existing</u> record: Move to **Step 2 No Record Found** below

	Precertification Screen can be completed and verified prior to the scheduled appointment	
Step 2 **Precertification Screen** Refer to *PPS Secure and Confidential Communications* – preferred communication	**Record Found / Update Information:** 1. Access the **Precertification screen**: update address, phone, etc. as applicable. 2. Select the participant from the applicant grid that needs an appointment. a. Add **new applicant(s)** to the grid, if needed.	**No Record Found / Add New Household:** 1. Access the **Precertification screen**. 2. Complete required fields (*) for the Head of Household **(HoH)**. 3. Verify the **assigned clinic** is correct. **Add Applicant(s) Information** 1. Only add those that are applying for WIC, this includes the Head of Household if she is an eligible applicant. **Complete Phone Grid** 1. Click the 'Add' button to add a row to the phone grid. Enter the phone number and phone type. You can enter multiple phone numbers. Indicate "preferred" contact method. **Primary Language of Household** 1. Select the primary language of the household. Mark the Translator Required checkbox as appropriate. 2. **Save** screen.

Step 3 **Mark On-Site or Schedule**	**Scheduling / Participant to be seen today (Walk-In):** 1. Click the **Mark on Site** button. A popup "How may I help you today" will display. 2. Click the "Service" column to select the appropriate appointment type from the drop down for each applicant. Click **Close** to save the screen and close the popup. 3. An appointment will auto-generate on the Daily Schedule and client is added to onsite list.	**Scheduling / Making an appointment for a later time / date:** 1. Click **Next** to schedule an appointment for a later date. 2. Select **New Appointment** type from the drop down. 3. Enter a start and end date to search and schedule the appointment.

	If proofs were obtained prior to the visit, enter in Step 4a below.
Step 4a **Household Information** *Refer to Understanding Roles in WIC* **30 day shortened cert:** available to participants missing 1 of the required 3 proofs	1. **Mark on Site** all applicant(s) to be seen. 2. Access the **Household Information** a. This screen consists of 2 tabs (household information and income information) that must be completed. 3. **Household information** tab – complete all required fields, including proxy. 4. Select **Proof of Residency** provided**.** a. If HoH is homeless, follow IL WIC PM CS 2.1-2.2 5. Click the **Next** button to save the Household Information tab and to automatically advance to the **Income Information** tab.
Step 4b **Income information** *Use Approved Adjunctive Eligibility Resources document*	**Income information** tab – complete all required fields: a. **Include in Verification** column will be automatically checked for each person marked onsite for a certification appointment in the household. <table><tr><td>**Adjunct Eligibility –** Applicant has Title 19 Medicaid, SNAP, or TANF: 1. Using the boxes at the top of the grid, indicate whether or not the Household is participating in the listed programs, this will autofill the REP checkboxes with either a "Yes" or a "No". 2. **Verify "VER"** only <u>one</u> program to determine adjunctive eligibility. Click VER to verify documentation used as proof. 3. Add a blank row to the household income grid. Using only **verbal income** reported by the HoH, complete the required fields. a. Select **adjunctive eligibility** for documentation proof. b. <u>Foster Child</u>- Select **DCFS Custody** for documentation proof and use the monthly stipend received by foster family.</td><td>**Traditional Income** 1. Mark "not participating in Medicaid, SNAP, or TANF". 2. Add a blank row to the household income grid. Each type of income available in the last 30 days to the household must be added one row at a time. 3. Complete all required fields based on income documentation provided by the HoH. 4. If "zero income": a. Ask the applicant to describe in detail their living circumstances and how they are supported and pay for necessities, such as food, clothing, housing and medical care. b. Enter amount of support and documentation "Zero Income". If no consistent support enter "0" for amount. c. Document information provided about living circumstances in General Note and make appropriate referrals to Medicaid and SNAP.</td></tr></table> 5. Enter **household size**. a. Pregnant woman includes herself & fetus(es), in addition to anyone else in the household. b. Foster child would be a household of 1. 6. Review **Rights and Responsibilities**. a. Capture signature of HoH. b. **Toggle** from the household level to the **Participant Level** and click **Next** to save the screen and advance to the **Participant Info Screen.**

Step 5	1. Enter Second Parent information, otherwise mark declined (Infant/Child categories).
Participant Information To be completed for each applicant.	a. Screen to see if HOH would like the other parent listed under Second Parent, so they may bring to subsequent WIC visits.
	2. Verify **Birth Date** and **save**.
	3. If infant or child, and Mother is on WIC enter **Mother's ID**.
	a. If foster child, indicate Mother Not in HH.
	4. Foster Care – check box, if applicable
	5. Ethnicity: Hispanic/Latino: answer Yes or No
Refer to PPS National Voter Registration Requirements, for details	6. Race: Select all that apply to applicant.
	7. Select **Proof of Identity** provided.
	8. The Special Needs field is available as relevant.
	9. Print and complete the **Voter Registration Information** (VRI) and **Application**, as applicable.
	10. **Save** and repeat process for each applicant, if applicable.

If participant is interested in registering to vote, and does not require assistance,
provide URL for on-line registration by applicant.

Step 6	**Note: it is essential the HoH's date of birth (DOB) and zip code are entered accurately in the MIS as this is used when setting the eWIC card PIN**
eWIC Card Set-Up (New household / those without an EBT card only)	1. On the menu bar, click **Benefits**, then **eWIC Card Account Maintenance**.
	2. Cardholder type is always HoH and the Card Holder Name is the HoH. If the name is not correct, go to the Household Info screen to correct before proceeding.
Use: "eWIC Card Brochure"	3. Obtain an **unassigned** eWIC card from inventory.
	4. Select the Head of Household row in the EBT Accounts grid, then click the **Account Setup** button.
HoH must set up a PIN before leaving the clinic.	5. A popup opens with Card Issued To, Card Holder Name and Head of Household DOB. If information is not correct, cancel popup and go to the Household Info screen and correct the information before proceeding.
	6. If information in popup is correct, swipe the new card in the EBT reader or enter the EBT card number. Click **Submit**.
	7. You will receive the message "account successfully established".
	8. If submit was not successful, contact the State WIC Staff for assistance by completing an I-WIC Issue Report form with your supervisor.

Step 7	1. Participant record must be closed for CPA to continue the Certification.
Close Participant Record	2. **Close** record by selecting **Search.**