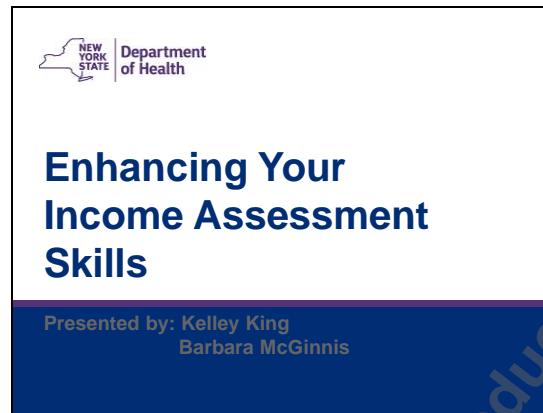


Slide 1



Audio


Good morning everyone and thank you for joining us today!

- Today's topic is Enhancing Your Income Assessment Skills
- Before we get started with the topic, I just want to go over some logistics with you.

2

Important Notice

- This GotoWebinar/GotoMeeting service includes a feature that allows audio and any documents and other materials exchanged or viewed during the session to be recorded
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Audio

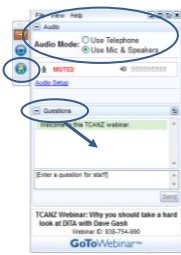
Basically this notice explains to you that this webinar is being recorded and by joining you agree to this recording.

3


Logistics

- Typed questions
- Poll Questions
- Raise hand
- Audio
- Tech Difficulties

1-888-259-8414



The screenshot shows a GoToWebinar interface. At the top, there are two radio buttons for 'Audio Mode': 'Use Telephone' and 'Use Mic & Speakers'. Below this is a 'MUTED' status indicator. A 'Questions' section is visible, containing a text input field with the placeholder text '(Enter a question for staff)'. A 'Send' button is located to the right of the input field. At the bottom of the interface, there is a message: 'TCANZ Webinar: Why you should take a hard look at DSA with Dave Gade' followed by 'Webinar ID: 838-754-880' and the 'GoToWebinar' logo.



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Audio

- Some logistic information

4

Training Goal

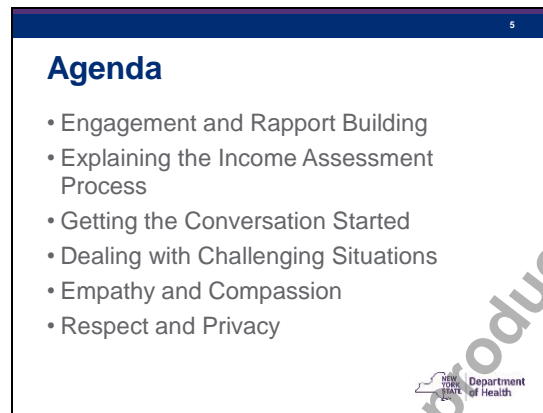
- To provide WIC support staff with increased confidence to conduct a successful and effective income assessment

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Audio

Good morning everyone!

- So our goal for today's webinar is to provide you, WIC support staff, with increased confidence to conduct a successful and effective income assessment for our WIC participants.
- As support staff you play a pivotal role in the certification process and one of your primary responsibilities is assessing income eligibility for our WIC participants.
- In order to conduct an effective income assessment, you must first have a thorough knowledge of eligibility for the WIC program which includes an in depth understanding of the WIC income policy.
- I want to be clear before we get started, the purpose of this webinar is NOT to go over every piece of the income policy with you because we just don't have time.
- You have two very good resources, the WIC Program Manual section #1130-Income Eligibility and Policy Supplement which can help you with specific topics.
- Today's goal is to enhance your confidence with the skills that are necessary to accomplish this, sometimes very challenging, task.



Audio


The topic areas that we will be discussing today include:

- Engagement and Rapport Building with our applicants and participants. **Just so you are aware, we will be using participants and applicants interchangeably throughout this training.**
- Explaining the Income Assessment and Certification Process so they have a good understanding of what will be covered during the appointment
- Getting the Conversation Started and Keeping questions Open-ended and asking Tough Questions
- How to help deal with some Challenging Situations
- Providing Empathy and Compassion to all of our participant
- And last, Respecting WIC participants and keeping their personal information private

6

Learning Objectives

- As a result of this webinar, WIC support staff will:
 - Develop enhanced communication skills to support the income assessment process
 - Receive helpful techniques to use when presented with challenging situations
 - Understand when personal biases play a role when conducting an income assessment

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Audio

Next are today's Learning Objectives

As a result of this webinar, WIC support staff will:

- Develop enhanced communication skills that support the income assessment process.
 - How do you ask personal questions in a supportive way?
- Offer some helpful techniques for handling challenging situations.
- Examine the role that personal biases play in the process.



Audio


Before we get into the training, we would like launch a poll asking you, on a scale of 1-5 (1 being the least and 5 being the most),

- How comfortable/knowledgeable do you feel in providing an income assessment?:
 - 1 (least)
 - 2
 - 3
 - 4
 - 5 (most)

8

Let's Chat!

- What areas do you need more clarification when it comes to the WIC income policy?



Audio

So let's talk about this for a minute.

- We would love for you to talk with us, you can raise your hand and we can unmute you or you can type in your responses in the chat box.
- So the question is, "What areas do you need more clarification when it comes to the WIC income policy?" What is confusing for you?
- (ANIMATE) Please use your chat box to type in an answer or raise your hand so that we may open your mic.

9



I. Engagement and Rapport Building



Audio

Good Morning everyone! Thank you so much for joining us today!

- So we are going to begin today's webinar with a discussion regarding Engagement and building Rapport with our participants.

10

Engagement

- Is an establishment of a trusting and mutually respectful working relationship
- Engaging with our participants from the very first phone call is vital
- Requires effective and balanced use of skills to produce an ongoing worker-client relationship

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Audio

So let's first talk about Engagement

And of course there are many different definitions out there but one definition of "Engagement" is *"an establishment of a trusting and mutually respectful working relationship"*.

- As support staff you are basically the gate keepers of WIC program integrity which means, you are responsible for ensuring that only WIC participants, who are truly eligible, receive benefits.
- So engaging with our participants from the very first phone call is vital.
- You are required to ask some very personal questions regarding different areas of their lives. Their household income, who lives in their household, how they are meeting their expenses, and so forth.
- This requires the effective and balanced use of different skills to produce an ongoing worker-client relationship.
- I am sure, if you have been conducting income assessments long enough, you have found some participants that are very comfortable and open when sharing details about their lives.
- I would also guess that more often though, you deal with individuals that are hesitant to reveal their personal information to a total stranger.

11

Let's Chat!

- How do you become a trusted partner with your WIC participants?

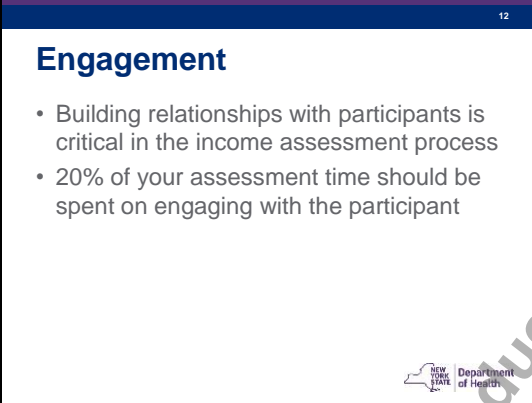


 Department of Health

Audio

- So let's talk about this...
- How do you, in the limited amount of time that you have, become less of a stranger and more of a trusted partner with your WIC participants?
- Are you someone that participants are comfortable opening up to and comfortable sharing information with?


(ANIMATE) Please use your chat box to type in an answer or raise your hand so that we may open your mic.



12

Engagement

- Building relationships with participants is critical in the income assessment process
- 20% of your assessment time should be spent on engaging with the participant

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Audio

So based on those responses, this is where engagement is a critical piece of the income assessment process.

- Taking those few minutes at the beginning of the appointment to build rapport is so incredibly essential to build trust with a participant!
- If you take the time to engage with them and build rapport, not only will it set the stage for the entire certification, but for any future encounters you may have with them.
- Having an established sense of trust can certainly be helpful especially when you have to start asking those personal questions.

(ANIMATE) The rule of thumb is that for each interaction that you have with a participant, you should spend 20% of your time on engagement.

So what does that mean for you?

- Well basically it means that if you have a 30 minute appointment scheduled with applicants/participants that roughly 6 minutes of that time should be spent on engaging with them and building rapport.
- I know that 30 minutes is not always realistic, so if the appointment is a 15 minutes appointment, then about 3 minutes should be spent on getting to know that person, having a conversation and getting them to connect with you.

- So engagement means the participant understands the purpose, the steps and the expectations of the appointment! And they feel comfortable asking questions, and express their comments or concerns anytime throughout the appointment.


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13

Rapport

- Definitions:
 - A close and harmonious relationship in which the people or groups concerned understand each other's feelings or ideas and communicate well
 - A good sense of understanding and trust

Sources: Oxford dictionary and Vocabulary.com

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Audio

Now lets talk about rapport

In searching the internet, again, of course there are several definitions for the word rapport,

- The definition from Oxford Dictionaries states *Rapport* is defined as “A close and harmonious relationship in which the people or groups concerned understand each other’s feelings or ideas and communicate well.
- (ANIMATE) Vocabulary.com also had a definition that resonated with me as well and says *Rapport* is a good sense of understanding and trust.
 - It goes on to provide an example which states “if you have good rapport with your neighbors, they won't mind if you kick your ball onto their property every now and then”. There will be no issues.

So, how might this relate to the work that you do at WIC?

- Sometimes we have to dig deep into our participant’s lives and they may perceive this as we are invading their privacy!
- However, if rapport and trust have been established and participants know that WIC staff have their best interest at heart, then, hopefully, they will feel comfortable with us when we have to ask these very personal questions.

14

Rapport

- Establish rapport before expecting anyone to listen to you
 - Leads to successful communication
 - Mutually respectful way of being with others
 - A successful way of conducting business
- Essential to making a participant feel comfortable and supported during the income assessment process

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Audio

So the establishment of rapport is necessary before expecting anyone to listen to you.

- This is actually the case with anyone and in any situation.
 - It could be an acquaintance, a friend, a co-worker, but especially when it comes to a business relationship.
- (ANIMATE) Establishing rapport is essential to making a participant feel comfortable and supported during the income assessment process

15

Rapport

- Establishing rapport with a participant is an essential ingredient to successful communication
- You know you have established rapport when you:
 - Experience a genuine sense of trust and respect with another person
 - Engage comfortably with another person
 - Know you are listening and being listened to

Source: Neuro-linguistic Programming for Dummies (Ready and Burton, 2004)

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Audio

- Establish rapport is an essential ingredient that leads to successful communication.

(ANIMATE) You know you have established rapport when you:

- Experience a genuine sense of trust and respect with another person
- (ANIMATE) When you engage comfortably with someone no matter how different they are from you
- (ANIMATE) When you know that you are listening and being listened to.

Rapport makes getting things “done” much easier

- Take the time to engage with them and create good rapport. I promise, it will be rewarding for both you and the participant!

From Neuro-linguistic Programming for Dummies (Ready and Burton, 2004) page 101

16

Tips for Establishing Rapport

- Try to find common ground
- Make eye contact
- Present open body language
- Be aware of your facial expressions
- Mirror the person you are speaking to
- Be happy and friendly
- Make them feel good about themselves
- Greeting participants by name

Source: Women's Agenda Seven tips for building rapport and establishing relationships

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Audio

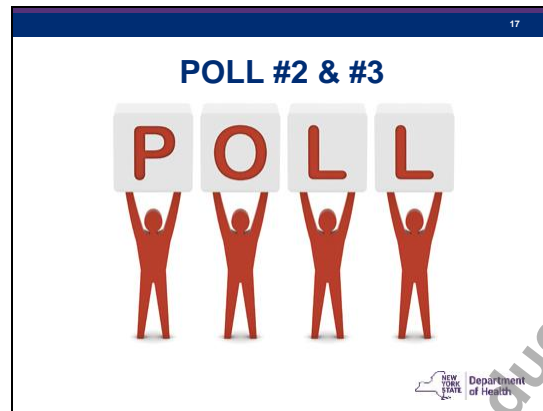
This is from *Women's Agenda Seven tips for building rapport and establishing relationships*

Here are a few tips for establishing good rapport with another person

- When you talk with someone, try to find a common ground. Something that you may have in common with them. Like attracts like, and conversations are always more positive when the person you are talking to views you as being similar to them. Maybe it's about their child, sports, anything you may find in common with them.
- (ANIMATE) When you're speaking to someone, your eye contact will let them know you are interested and listening. If you're looking around the room or at others, they won't feel like you are paying attention to them.
- (ANIMATE) Another way to let the person you're speaking to know you're interested is to have open body language. Face your body towards them and at times even lean in when they are talking, this will show them you're engaged.
- (ANIMATE) Be aware of your facial expressions when people are talking to you. If you're yawning they may think you're bored or disengaged (even if you are just tired), if you're frowning they may think that you disagree with them and if you're smiling and nodding they will think you agree or are telling them to continue on with what they are saying.
- (ANIMATE) Mirroring or matching the body language, speech and tone of the person you are talking to can be a great way to build rapport quickly. Casually make the same gestures they do and if they talk slow, you talk slow or if they talk fast, you talk fast.
- (ANIMATE) People are naturally attracted to warm, bubbly people so make sure you are happy and friendly. Not only will it make you more likeable, you will also help those who are nervous to feel more relaxed around you.

- (ANIMATE) And if you get the opportunity, pay the person you are talking to a genuine compliment, emphasis on genuine. When we make others feel good about themselves, they naturally warm to us and remember us more positively.
- (ANIMATE) Greeting participants by name is also very important.
- So starting off by building rapport will not only impact your relationship with the participant, but it will also help other staff members when they interact with this participant. Again, remember rapport building is not something that happens just once. It's essential continuously.

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Audio

So let's conduct our next polls!

POLL #2

- I always make a good first impression and good rapport is never a problem for me.
 - Agree
 - Disagree
- Do you agree or disagree with this statement?
- "Here are the results --- of course there are no right or wrong answers to this question."

PROCEED TO POLL #3

- Building good rapport from the first time I meet someone can help later if problems arise.
 - **Agree**
 - Disagree

Do you agree or disagree with this statement?

- Based on your poll results, it appears that (many or all) of you recognize the value of building good rapport and the impact that it can have on your relationship with participants.

WIC Participant Rights and Responsibilities (4369)

WIC Participant Rights and Responsibilities

I have received information on my rights and responsibilities as a WIC participant. I understand I have the right to:

- Receive fair and respectful treatment from WIC staff and grocery store employees.
- Have the information I have given to WIC staff stay private. It will not be released to anyone outside the WIC Program without my permission.
- Get nutrition education and information about health care and other helpful services.
- Use any grocery store or pharmacy in New York State (NYS) that is allowed to accept WIC.
- Get a food package that meets my nutritional needs, or those of my child.
- Ask for a transfer to another WIC local agency.
- Be told in writing when and why my WIC Program benefits will end.
- Ask for a fair hearing if I do not agree with decisions about my eligibility.

The information I have given to use if I am eligible for the WIC Program is correct, to the best of my knowledge, I understand that:

- WIC Program staff may check the information I have given them to see that it is correct. They may contact my doctor or other sources for my income. They may get my tax records from the NYS Department of Revenue and Finance. When checking if I am participating in WIC, they won't ask for information from more than 10 months before I request. If they are checking to see if my WIC info was broken, they may request information for any period during which I received WIC benefits.
- I must notify my WIC local agency if I plan to move, my phone number changes, the income changes for anyone in my household, or if I want to change to another WIC local agency.
- If I do not tell the truth or if I hide information or answer to get WIC benefits, I may have to pay the State back for the benefits I did not qualify for. I may also be taken to court by New York State or Federal officials.
- I may enroll in only one WIC Program. I confirm that I am not currently enrolled in any other WIC Program.
- WIC foods are only for the enrolled baby member. I cannot sell, offer to sell, or give away WIC benefits to any one.
- If my food package needs to be changed or stopped for a short time, I will call my WIC local agency.

I am aware that the WIC local agency will make health services and nutrition education available to me, and I am encouraged to take part in these services.

I am aware that rules for eligibility and participation in the WIC Program are the same for everyone, regardless of race, color, national origin, age, handicap, or sex.


Audio

- In addition to making sure participants understand the certification process, and all the wonderful benefits of the WIC program, it is also important for them to be aware of their Rights and Responsibilities of being a WIC participant.
- This is a copy of the current WIC Participant Rights and Responsibilities document, form number 4369 which is available in the WIC library.
- I know you can't read it but I wanted you to have a visual of what it looks like.

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WIC Participant Rights and Responsibilities

- A printed copy of the document in the appropriate language must be provided to a participant at the beginning of each certification
- Informs the participant the information provided to WIC staff will remain private and will not be released to anyone outside of WIC without the participant's permission



Audio

- (ANIMATE) A printed copy of the WIC Participants Rights and Responsibilities document in the appropriate language must be provided to a participant at the very beginning of each income assessment appointment.
- Staff must:
 - allow the participant to read it or summarize the content using the short script. ('The Rights and Responsibilities Script for Local Agency Staff' is located in the WIC Library at the Enrollment > Rights and Responsibilities Script folder.)
 - ask open-ended questions to ensure the participant understands prior obtaining a signature and collecting eligibility information
- The participant must electronically sign in NYWIC that they were informed of this information.
- (ANIMATE) The document informs the participant-the information provided to WIC staff will remain private and will not be released to anyone outside of WIC without the participant's permission. Having participants read the Rights and Responsibilities statement before beginning the assessment process and understanding their information will be kept private will hopefully help to increase their comfort level in sharing information as it places emphasis on confidentiality and hopefully this will help them open up to you.

20

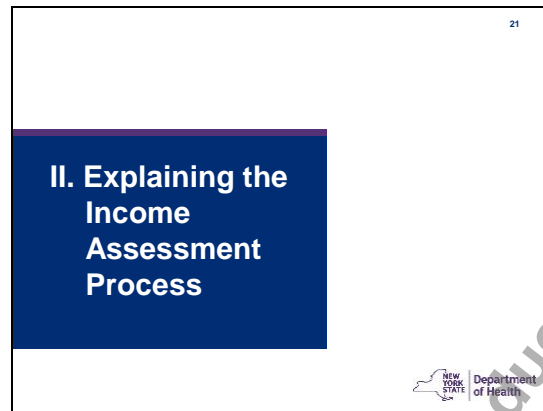
WIC Participant Rights and Responsibilities

- Informs the WIC Program can verify with other agencies the information the participant has provided is accurate and true
- Provides information on fair hearing rights if the participant disagrees with a decision of being turned down for WIC benefits

 Department of Health

Audio

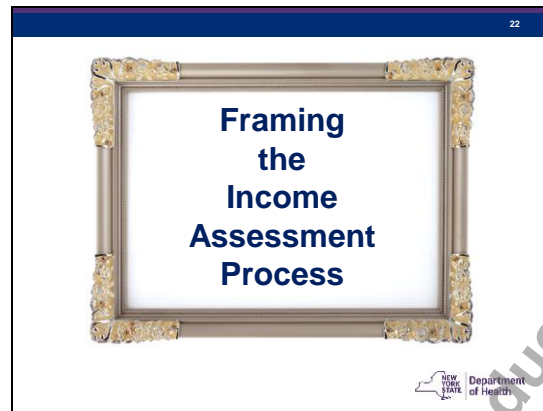
- Also, the statement stresses the importance of providing correct information and the fact that local agency staff have the right to verify income sources by contacting employers, income sources and the NYS Department of Taxation and Finance, etc.
 - This document really informs a participant that the information they provide must be accurate and the consequences of not telling the truth.
- (ANIMATE) And it also provides information on fair hearing rights if they disagree with a decision of being turned down for WIC benefits



Audio

The next section we will discuss is, preparing participants for the Income Assessment process.

- In other words, helping them understand the income assessment process.





Audio

- That leads us to our next slide which is Framing the income assessment process with a participant.
- It is critical to take the time to provide a clear explanation the income assessment process from the very first contact with an individual.
- They may call to set up their first appointment, or maybe they came right to your office directly from their doctor's appt. so you may not be scheduling them for the same day.
- Regardless of how they first contacted you, it's important to set the stage for the entire certification so they have an idea of what to expect.
- Think about how you would feel if you were scheduled for an appointment but you didn't know what to expect.
- Especially if they are brand new to the WIC program. Framing the income assessment will assist with any confusion, concern, anxiety they may have by participating in the program and hopefully will get the appointment off to a good start.

23

Let's Chat!

- How do you explain to a new applicant the income eligibility requirements for the WIC Program?




Audio

- How do you explain to a brand-new applicant the income eligibility requirements for the WIC Program?

24

Some Common Comments

- “I didn’t know you were going to ask me so many questions”
- “Why do you need my partner’s paystubs? Natasha is not his/her child”
- “Why do I have to come back next month with more paystubs?”

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Audio

- Participants may have many comments and concerns when first meeting with them.
 - (ANIMATE) “I didn’t know you were going to ask me so many questions”
 - (ANIMATE) “Why do you need my partner’s paystubs? Natasha is not his/her child”
 - (ANIMATE) “Why do I have to come back next month with more paystubs?”
- Framing the income process upfront may help participants understand that these questions are common and must be asked of all participants

25

Framing

- A communication technique when focusing attention within a broader context
- Form of agenda setting
- Important when introducing the Income Assessment process

The logo of the New York State Department of Health, featuring a small map of New York State and the text "NEW YORK STATE Department of Health".


Audio

- A communication technique when focusing attention within a broader context
- (ANIMATE) Form of agenda setting
- (ANIMATE) And is extremely important when introducing the Income Assessment process

26

Framing Example

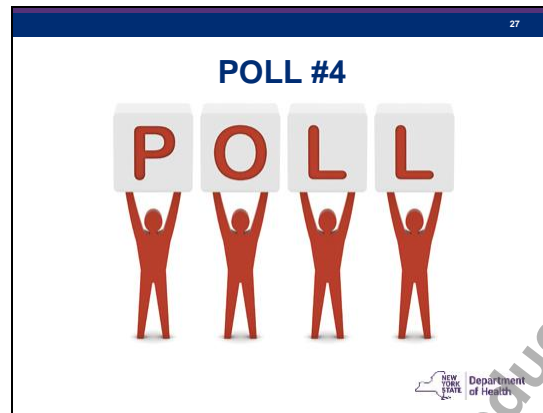
In a few minutes, I'm going to ask you some questions about your income. I do this with all new participants to determine if they are eligible for the WIC Program. I know it may be awkward and I will do my best to make this as easy as possible for you.



Audio

Here is an example of a framing statement for the income assessment process.

- “In a few minutes, I'm going to ask you some questions about your income. I do this with all new participants to determine if they are eligible for the WIC Program. I know it may be awkward and I will do my best to make this as easy as possible for you.”



Audio

So let's conduct our next poll!

- What are your reactions to this statement?


How often do you frame the conversation before the income assessment begins?

- Never
- Sometimes
- Often
- No right or wrong answer

28

Initial Contact

- Critical to provide a clear explanation of the income assessment process and what proof is needed to determine eligibility
- Explanation of the Income Assessment process includes:
 - Determining their economic unit
 - Assessing for adjunct program participation
 - Assessing household income



Audio

- So we've just established it's critical for staff to take the time to provide a clear explanation of the income assessment process right from the very first contact and what proof will be needed to determine eligibility.

(ANIMATE) So it's very important is to explain

- Who must be included so determining their economic unit
- This is because it will determine if adjunct program participation or income proof will be needed for the appointment.
- (ANIMATE) Assessing if anyone is participating in an adjunct program
- (ANIMATE) and if not eligible for an adjunct program, then assessing the household income
- Again, if you don't take the time at the initial contact to explain how WIC determines who is part of the economic unit, then the participant may not come to the appointment with all of the necessary income documentation for all the members of their economic unit

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Initial Contact

- Also explaining the proof that must be provided at the appointment includes (not an all-inclusive list):
 - Identity for the Authorized Rep
 - Photo ID card, birth certificate, citizenship/immigration document
 - Residency
 - Current rent receipt, pay stub, utility bill
 - Active adjunct program participation
 - CBIC, eligibility letter for SNAP or TANF benefits
 - Household income if not eligible for an adjunct program

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Audio

Additional information that should be explained at initial contact includes explaining what proof needs to be brought to the appointment:

- (ANIMATE) First is Proof of Identity for the authorized rep. Items that could be provided include Photo ID card, birth certificate, citizenship/immigration document
- (ANIMATE) Proof of Residency could be current rent receipt, pay stub, utility bill
- (ANIMATE) Proof of adjunct program participation includes CBIC (Common Benefit Identification Card), eligibility letter for SNAP or TANF benefits
- (ANIMATE) And if they are not eligible with an adjunct program, then all income for the economic unit must be verified
- This participant may have taken time off from work to come to the appointment only to find they don't have everything they need and will need to come back for a later date so take the time to talk about how income eligibility is assessed.
- Talk about the economic unit and who is included for a participant and when explaining they must provide their income, they usually just think about wages; however, there are many different sources of income that is counted and explaining what is counted as income can be very helpful. If you take the time to explain who is included and what income counts, this will help set them up for a successful appointment.


- Now, we are very aware that time is of the essence and that you may be thinking that this is way too much information to explain over the phone.
 - However, if you don't take the time here, then the applicant may come to the appointment unprepared which can be problematic. This may lead to you having to reschedule that appointment or the applicant might just leave frustrated enough and not want to return at all.
 - This being the worst outcome because this person, or family, probably really needs WIC services.

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30

What Staff Need to Know

- Adjunct program (Medicaid, SNAP, TANF) participation is the preferred method to document WIC income eligibility
- The majority of WIC participants is adjunctively eligible
- The intent of using adjunct programs:
 - Makes it easier for the participant and reduces administrative burdens for staff
 - Expedites WIC eligibility by removing potential barriers



Audio

Some important information for staff.

Adjunct program (Medicaid, SNAP, TANF) participation is the preferred method to document WIC income eligibility.

(ANIMATE) We know the majority of participants will fall under this category.


(ANIMATE) The intent of using adjunct programs is to:

- Make it easier for the participant and reduces administrative burdens for staff
- Expedite WIC eligibility by removing potential barriers

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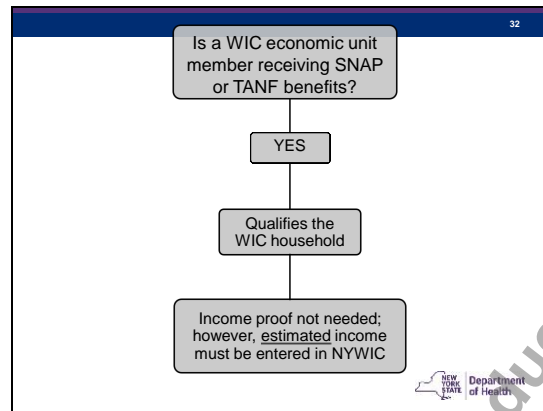
What Staff Need to Know

- When adjunctively eligible, the household's estimated income must be documented; but, proof of the income is not required
- Estimated income is used to assess how participants are meeting their needs and to provide any potential health or social services referrals
 - HEAP, Medicaid, SNAP, TANF, etc.
 - A basic understanding of eligibility for referrals is necessary



Audio

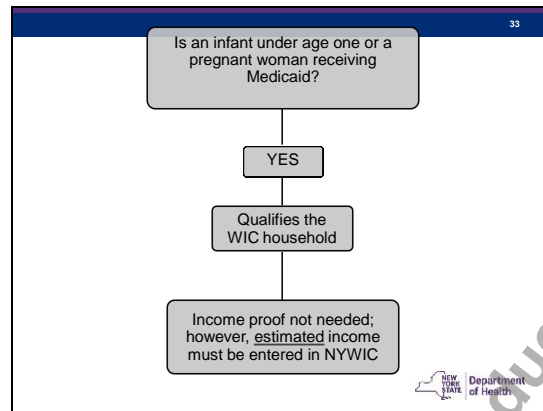
- When active participation for Medicaid, TANF or SNAP is verified, income documentation is not required
- (ANIMATE) However, estimated income for the economic unit is entered into NYWIC to assess how participants are meeting their needs and to provide any potential health or social services referrals
 - HEAP, Medicaid, SNAP, TANF, etc.
 - A basic understanding of eligibility for referrals is necessary



Audio

So we know it can be confusing on whether or not we need to see proof of income for a participant, so we have a flow chart for you to help make that decision

- (ANIMATE) After assessing the economic unit, we first look to see if they are actively enrolled for an adjunct program. So is anyone that is included in the economic unit receiving SNAP or TANF benefits?
- (ANIMATE) If their participation in SNAP or TANF is verified, this will qualify all eligible members in the household for the WIC program.
- (ANIMATE) When adjunctively eligible, income proof is not needed, and the participant can provide you with a verbal estimate of their current income broken down by sources of income in the household.



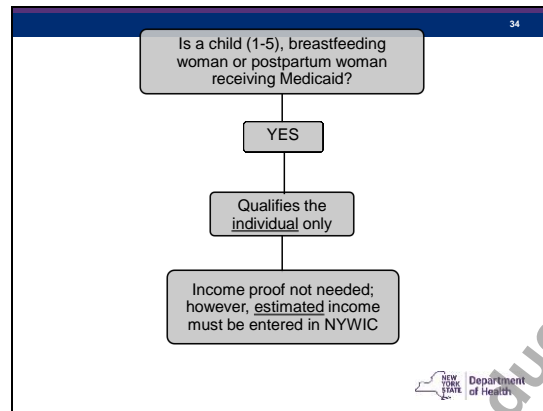
Audio

(ANIMATE) The same goes for an infant under age one or a pregnant woman who is receiving Medicaid or presumptively eligible for Medicaid.

(ANIMATE) If their active participation in Medicaid is verified,

(ANIMATE) this will qualify all eligible members in the household for the WIC program

(ANIMATE) And again, income proof is not needed. Just a verbal estimate of the household income.



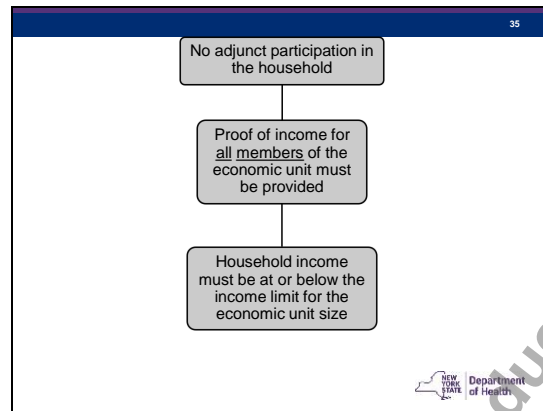
Audio

(ANIMATE) If the household has a child age 1 up until the child turns age 5, breastfeeding woman, or non-breastfeeding postpartum woman up to 6 months after birth,

(ANIMATE) and the child or the woman is receiving Medicaid

(ANIMATE) The child's or the woman's active participation in the Medicaid will qualify for that individual only.

(ANIMATE) but again, income proof is not needed, just an estimate of the household's income.



Audio

(ANIMATE) Now, when we have a household and nobody is participating in an adjunct program, there is no SNAP, TANF or Medicaid participation, then we have to see proof of household income. There are many sources of income as I'm sure you know


(ANIMATE) The participant must provide proof of all income

(ANIMATE) And that income must be at or below the income limit for their household size. If it is, they would be eligible for WIC benefits.

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Certification Appointment

- When the appointment begins, manage the participant's expectations by explaining:
 - What will take place during the visit
 - And the steps in the income assessment process which include assessing:
 - The economic unit
 - Adjunct program participation (Medicaid, SNAP, TANF)
 - Income if not eligible with an adjunct program

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(ANIMATE) So now that the participant is here and you are ready to begin the appointment, what is important to remember is that you should always begin by explaining what is going to take place during the visit. Again, back to framing. Inform them of what will happen over the next 15-30 minutes or an hour.

It's best to manage their expectations by providing a brief overview of:

- (ANIMATE) What will take place during the visit and what is your role in the income assessment process.
- You could say something like,
 - “You’re going to meet with me first and I’m going to ask you some questions. I just want you to know, these are questions I must ask all WIC participants. We are going to take a look at your information and determine if you meet the eligibility requirements for the WIC program.”
- Also explain what the Participant’s role is as well
 - And that they must provide the necessary documentation, agreeing to the rights and responsibilities and so forth.
- (ANIMATE) also explain the steps in the income assessment process which includes:
 - (ANIMATE) Assessing the household size/economic unit, so who is included
 - Next, and always first after assessing the household size, is determining and verifying if anyone included in the WIC household is eligible for an adjunct program.

- So again, is anyone that is included in the economic unit eligible for Medicaid, SNAP or TANF benefits
- And if they are not participating in an adjunct program, are they eligible based on the household's income?

It's also important to paint a picture of what the WIC program is all about.



- It's not just about providing WIC benefits; we want participants to understand we provide so much more.
- So another example you could say is
 - "We're here to help you,
 - we're here to provide you helpful referrals,
 - And we provide you with nutrition education"
- Again, explaining what the full process is and all the benefits of the WIC program.

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Income Reassessment

- Only necessary during a certification period when a change in income eligibility status is reported to WIC staff




Audio

An income reassessment is only necessary during a certification period when a change in income eligibility status is reported to WIC staff.

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Income Reassessment

- Participants are responsible to report any changes in:
 - Economic unit size
 - Adjunct program eligibility (Medicaid, SNAP or TANF)
 - Household income
 - Changed jobs
 - Loss of income
 - New income

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- Additional information for staff is making sure the participant understands that they are responsible to report changes to the agency of anything that could impact their eligibility for WIC.
- This information is included in the right and responsibilities form they sign at the beginning of the appointment.

Some changes they must report include:

- (ANIMATE) Is there a change in the household size?
 - Did someone move in, did someone move out?
 - And that person was or should be part of the WIC economic unit.
- (ANIMATE) If they lose eligibility for an adjunct program and this is the program that conferred eligibility to WIC.
 - So if they lose their Medicaid, SNAP or TANF benefits, they must report this change to the agency
- (ANIMATE) Did their household income change?
 - Did the participant or someone in their household start earning more?
 - Did they start a new job?
 - Did they change jobs?
 - Did they lose a job?
- When a participant signs the WIC Participant Rights and Responsibilities form that we discussed earlier today, they are clearly informed, and agree to, reporting any changes to the WIC agency that could impact their eligibility for the program.


- You should also do a check for understanding when you are done, just to make sure they understand what is happening. Make sure you are addressing any questions they may have.

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Scenario #1

- Fred is applying for WIC benefits for his 3-year-old daughter Wilma
- Fred provides you with Wilma's Medicaid card and you verify through MEVS that she is Medicaid eligible
- Fred also provides you with his estimated income and the amount he tells you he earns exceeds the income level for WIC



Audio

Let's review what we have just learned by taking a look at a scenario.

- Fred is applying for WIC benefits for his 3-year-old daughter Wilma
- Fred provides you with Wilma's Medicaid card and you verify through the MEVS system that she is Medicaid eligible
- Fred also provides you with his estimated income and the amount he tells you exceeds the income level for his household size of 2 for the WIC program



POLL #5

- So based on our last scenario, is Wilma eligible for WIC benefits?
 - **Yes**
 - No
- **Yes**, because her enrollment in Medicaid is verified active, she is eligible for the WIC program regardless of her father's monthly income amount.

Poll #6

- Should Fred be reported to BSI because his significant amount of income exceeds the WIC level for his household?
 - Yes
 - **No**
- **No**, Medicaid qualifies Wilma for the WIC program regardless of how much income her father makes.
- So again, **No** is the correct answer.



Audio

- Once you have worked through engagement and feel there is good rapport, as well as managing the participants expectations of the certification appointment, then it's time to begin the assessment.


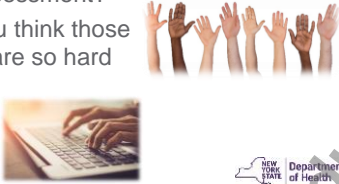
There's a certain amount of information, based on USDA requirements that must be gathered and we have to ask some very difficult questions.

- You could possibly start out by asking them if there are any other government programs they may be enrolled in where they have to answer these types of questions and they have had to provide proof of their income.
 - Maybe SNAP, HEAP, Section 8?

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Dealing With Tough Questions

- What are the most challenging questions for you to ask during an income assessment?
- Why do you think those questions are so hard for you?



Audio

As we begin this discussion on dealing with tough questions, we really want to look at this topic from two perspectives.

- WIC staff's perspective and the WIC participant's perspective

So first let's begin with you, WIC staff.

- (ANIMATE) What are the most challenging questions for you to ask during an income assessment?
 - Please use your chat box to type in an answer or raise your hand so that we may open your mic.


Second question

- (ANIMATE) Why do you think those questions are so hard for you?
 - Once again, please use your chat box or raise your hand.

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Dealing With Tough Questions

- What do you find to be the most difficult questions for participants to answer?
- Why are these questions difficult for a participant to answer?



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Audio

Now that we've identified those questions that are tough for you. We'd like you now to think about those questions that from your perspective are tough for the participant to answer.

So the next question is:

- (ANIMATE) What do you find to be the most difficult questions for participants to answer?
 - Please use your chat box to type in an answer or raise your hand so that we may open your mic.


Second question:

- (ANIMATE) Can you think of some reasons why these are difficult for the participant to answer?
 - Once again, please use your chat box or raise your hand to open the mic.

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Questions, Questions, Questions

- Some common questions that may be asked during an income assessment:
 - Who lives in your household?
 - Do you share income and expenses with anyone?
 - Does anyone participate in an adjunct program?
 - Does anyone in your household work?
 - Is there any other money coming in?
 - How are you paying your bills (if very low income)?



Audio

- The difficulty here is that you have a job to do, and that job requires getting answers to some very personal, specific questions.
- However, what I would also like you to do is to take a look at these questions. And think about how you might feel if someone just started firing away these questions to you.

Some common questions that must be asked during an income assessment include:

- (ANIMATE) Who lives in your household?
- (ANIMATE) Do you share income and expenses with anyone?
- (ANIMATE) Does anyone participate in an adjunct program?
- (ANIMATE) Does anyone in your household work?
- (ANIMATE) Is there any other money coming in?
- (ANIMATE) How are you paying your bills (if very low income)?

All of these questions can feel disarming and feels like an interrogation!

So the question is

- How do we get this information from participants without seeming like you are interrogating them?
- How do we help to make this interaction with our participants seem more like a conversation rather than an interrogation?


- Remember, at WIC, every interaction that you have with a participant should be participant-centered.

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Probing Questions

- To determine if an applicant is eligible for the WIC Program, many probing questions must be asked
- Explain these very personal questions must be asked of all participants and are necessary to determine their eligibility for the program
- All information is kept strictly confidential

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Audio

- To determine if an applicant is eligible for the WIC Program, these probing questions must be asked and that is what we will discuss next.

Set the stage for these questions

- (ANIMATE) Again, explain to every applicant or participant that these very personal questions must be asked of all participants and are necessary to determine the eligibility for the program
- (ANIMATE) Also try to ease their mind and explain that all of the information we obtain is kept strictly confidential
 - Hopefully this will help open them up to provide all of the necessary information that is needed to determine if they are eligible for the program.