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## 215.19

### Income Screening Over the Telephone

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- Introduction** Due to long travel distances to some WIC clinics, some applicants may ask WIC staff to screen their income eligibility over the phone before scheduling an appointment. This policy describes the basic process for screening income over the telephone.
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- Policy** This screening is not the same as eligibility determination because it is completed without review of income documents. Advise applicants to make an appointment if they would like to have a final eligibility determination.
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- Procedure** When a potential participant calls, follow the steps in the table below.

<b>Step</b>	<b>Action</b>						
1	Ask whether the applicant lives in Iowa.						
2	<p>Ask questions to determine adjunctive income eligibility including:</p> <ul style="list-style-type: none"> <li>• Do you receive Medicaid?</li> <li>• Do you participate in the Iowa Food Assistance Program or receive FIP payments?</li> </ul> <table border="1" data-bbox="280 411 1401 564"> <thead> <tr> <th data-bbox="280 411 651 447"><b>IF the applicant says ...</b></th> <th data-bbox="651 411 1401 447"><b>THEN ...</b></th> </tr> </thead> <tbody> <tr> <td data-bbox="280 447 651 520">Yes to any question</td> <td data-bbox="651 447 1401 520"> <ul style="list-style-type: none"> <li>• They are income eligible for WIC. Make an appointment for the family</li> </ul> </td> </tr> <tr> <td data-bbox="280 520 651 564">No to all questions</td> <td data-bbox="651 520 1401 564"> <ul style="list-style-type: none"> <li>• Continue to step 3 below.</li> </ul> </td> </tr> </tbody> </table>	<b>IF the applicant says ...</b>	<b>THEN ...</b>	Yes to any question	<ul style="list-style-type: none"> <li>• They are income eligible for WIC. Make an appointment for the family</li> </ul>	No to all questions	<ul style="list-style-type: none"> <li>• Continue to step 3 below.</li> </ul>
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3	Determine household gross income to the best of your ability.						
4	<p>Screen for eligibility by comparing household size and income to the current income guidelines or by using the income <b>guidelines reference</b> in the WIC data system.</p> <table border="1" data-bbox="280 753 1401 1100"> <thead> <tr> <th data-bbox="280 753 651 789"><b>IF reported income ...</b></th> <th data-bbox="651 753 1401 789"><b>THEN ...</b></th> </tr> </thead> <tbody> <tr> <td data-bbox="280 789 651 947">Exceeds the guidelines</td> <td data-bbox="651 789 1401 947"> <ul style="list-style-type: none"> <li>• Share the income guidelines with the applicant,</li> <li>• Tell them they don't appear to be eligible, and</li> <li>• Offer the option to make an appointment for review of their income documents.</li> </ul> </td> </tr> <tr> <td data-bbox="280 947 651 1100">Meets the guidelines</td> <td data-bbox="651 947 1401 1100"> <ul style="list-style-type: none"> <li>• Share the income guidelines with the applicant,</li> <li>• Tell them they appear to eligible, and</li> <li>• Encourage them to make an appointment for a final eligibility determination.</li> </ul> </td> </tr> </tbody> </table>	<b>IF reported income ...</b>	<b>THEN ...</b>	Exceeds the guidelines	<ul style="list-style-type: none"> <li>• Share the income guidelines with the applicant,</li> <li>• Tell them they don't appear to be eligible, and</li> <li>• Offer the option to make an appointment for review of their income documents.</li> </ul>	Meets the guidelines	<ul style="list-style-type: none"> <li>• Share the income guidelines with the applicant,</li> <li>• Tell them they appear to eligible, and</li> <li>• Encourage them to make an appointment for a final eligibility determination.</li> </ul>
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