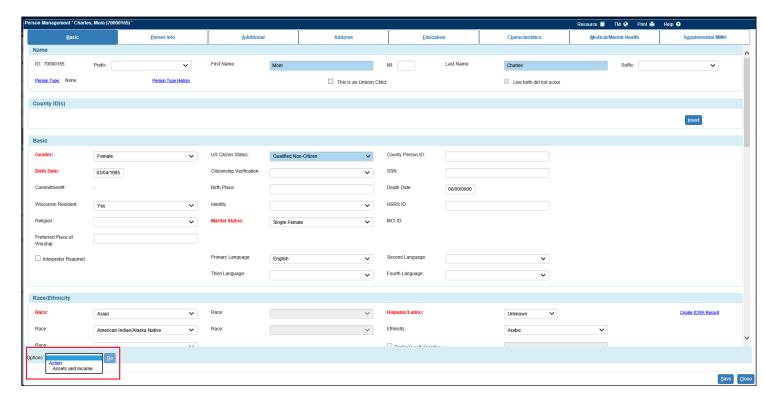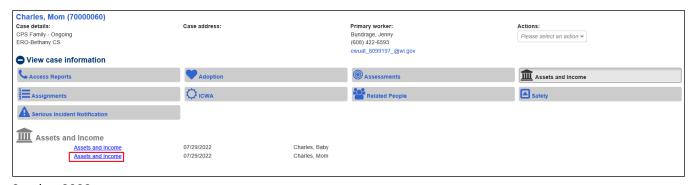# Assets and Income

Note: Asset and Income records are automatically created for all case participants when a case is created and when case participants are added to an existing case. An assignment to the case is not needed to update an asset and income record. However, additional security is needed for the Include checkbox to be enabled.

The Assets and Income page allows workers to view and document asset, income, expense, and employment information for a person. Additionally, view only SSI information displays on the SSI History tab, if applicable.
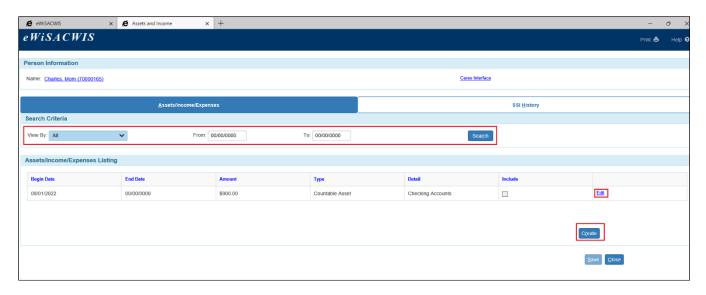
1. There are two ways to access the Assets and Income page:

   a. Select Assets and Income from the Options drop-down on any tab of the Person Management record (when Person Management is in edit mode), and click Go.

   b. From the desktop Cases tab, expand the Assets and Income icon for the case. Click on the appropriate hyperlink for the participant.

2. On the Assets and Income page, when an MCI ID exists on the person record, the Cares Interface hyperlink appears. When you click the hyperlink, eWiSACWIS will send a call to the CARES (Client Assistance for Re-Employment and Economic Support System) interface to request a matched individual based on the MCI ID. eWiSACWIS will immediately update the page with all fields returned from CARES.

3. The Assets/Income/Expenses tab displays a list of assets, income, and expenses. The Search Criteria group box allows worker to search by Record Type, as well as specific dates. Click Create to add a new asset, income, or expense record or Edit to modify an existing record. This will open the Maintain Assets/Income/Expense Record page.
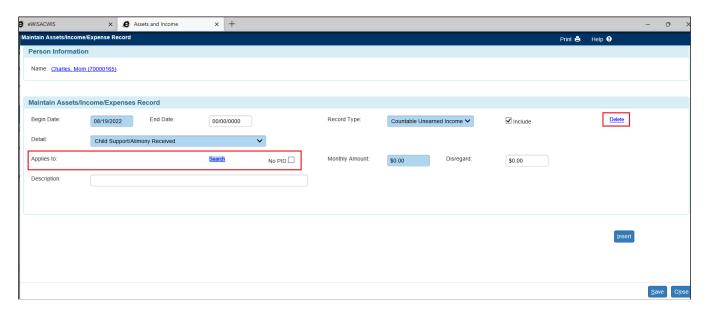

4. The Maintain Assets/Income/Expense Record page allows worker to view and document asset, income, and expense information for a person. Enter the Begin Date. If applicable, enter the End Date. Select a Record Type. The Include checkbox is only enabled for the eligibility unit and is used to designate the asset/income/expense is included in eligibility calculations. Select a value from the Detail drop-down – the options that appear in the list are based on the Record Type that was selected. If applicable, enter an amount in the Disregard field. Click Save. The Delete hyperlink only displays until the page is successfully saved. Once the record is saved, a Copy hyperlink appears in place of Delete.

   Note: When Countable Asset or Exempt Asset is selected from Record Type, the Monthly Amount field is disabled and the Market Value field displays.
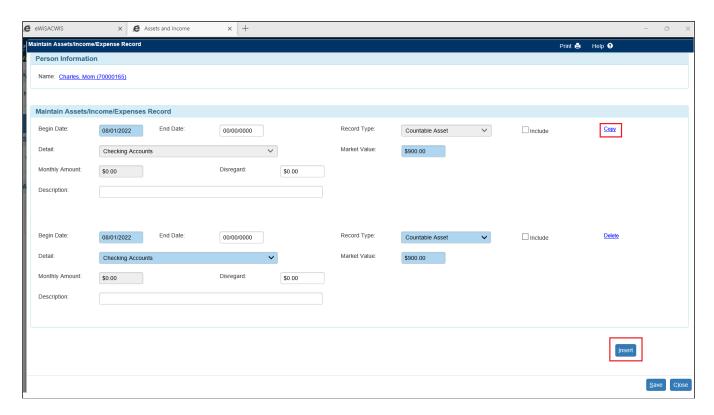
   Note: When Child Support/Alimony Received is selected from the Detail drop-down (Type = Countable Unearned Income), the "Applies to" field and a Search hyperlink displays. Selecting the Search hyperlink will launch the Person Search page for worker to search and select the existing person record of the child that the child support applies to.

   Note: When you select Child Support/Alimony Paid from the Detail drop-down (Type = Expense), the "Applies to" field and a Search hyperlink displays. Selecting the Search hyperlink launches the Person Search page to search and select the existing person record of the payee. Selecting the No PID checkbox will remove the Search hyperlink

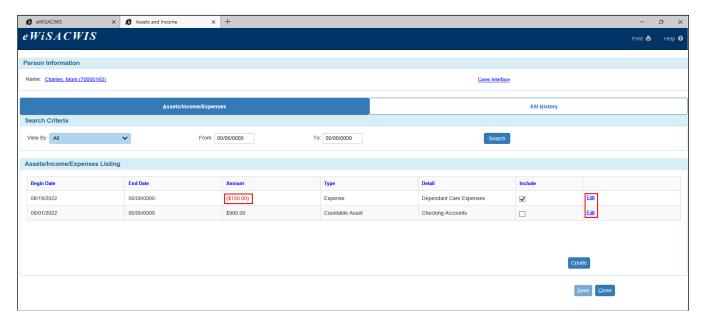indicating no eWiSACWIS person record exists for the payee.

5. Additional records can be created on the Maintain Assets/Income/Expense Record page by selecting the Insert button or by selecting the Copy hyperlink that displays once the page is successfully saved. Selecting the Copy hyperlink inserts a new record on the page, copying information from the existing record. The new record will be identical to that of the record it was copied from, but fields are enabled allowing worker to make modifications.
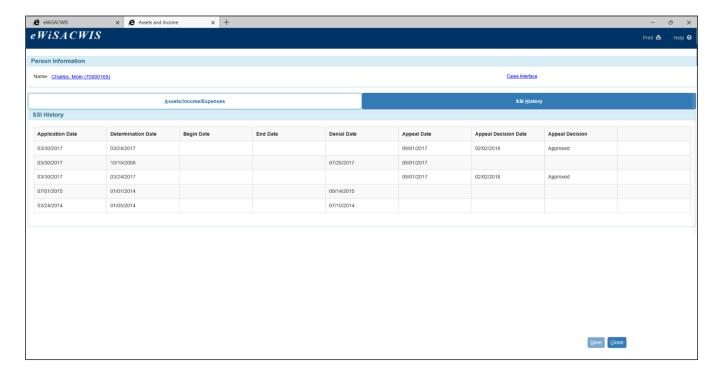

6. Click Close to return to the Assets and Income page where the Assets/Income/Expenses tab now displays the newly inserted records. The Search Criteria section allows worker to control the display of results based on the Record Type, as well as date parameters. The

Assets/Income/Expenses Listing group box displays the retrieved records in sortable columns. To change existing information, select the [Edit](#) hyperlink to access the Maintain Assets/Income/Expense Record page.

Note: The Amount field displays in red for any expenses entered as a negative amount on the Maintain Assets/Income/Expense Record page indicating a deduction on the Title IV-E Eligibility Financial Worksheet.

7. The SSI History tab is used to view SSI application and benefits history. The tab displays information pertaining to SSI data received from the CARES Interface. A SSI History row will be complete once an End Date is received from the CARES Interface.

To view the details of a specific SSI history record, select the Assets/Income/Expenses tab and click the associated [View](#) hyperlink.