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State of Wisconsin
Governor Scott Walker



TO: **W-2 Agencies
Training Staff**

FROM: Janice Peters, Director
Bureau of Working Families
Division of Family and Economic Security
Department of Children and Families

BWF OPERATIONS MEMO

No: **BWF 14-03**

DATE: **JANUARY 29, 2014**

W-2 EA

JAL RAP

Other EP *

SUBJECT: Impact of the Affordable Care Act on Wisconsin Works

CROSS REFERENCE: DHS Operations Memo [13-32](#): *BadgerCare Plus Policy and System Changes*
DHS Operations Memo [13-43](#): *BadgerCare Plus Policy Updates*
DHS Operations Memo [14-02](#): *BadgerCare Plus Applications Received from and Sent to the Federally Facilitated Marketplace*
[BWF Partner Training Service Learning Center](#) – Coach's Corner

EFFECTIVE DATE: February 1, 2014

PURPOSE

The purpose of this Operations Memo is to explain the potential impact of the Affordable Care Act (ACA) on Wisconsin Works (W-2) participants and provide an overview of some of the ACA-related changes to CARES Worker Web (CWW).

BACKGROUND

Provisions in the federal ACA (also known as 'Obamacare') and the Governor's 2013-2015 Biennial Budget require changes in several policies used to determine BadgerCare Plus (BC+) eligibility.

There are now three ways for Wisconsin residents to acquire a Qualified Health Plan (QHP), which is health insurance:

1. **Employer Sponsored Insurance** – People who have health insurance through their employer do not need to do anything. If a person does not have health insurance

through a job, he or she may qualify for BadgerCare Plus (BC+) or buy insurance through the Health Insurance Marketplace.

2. **BadgerCare Plus (BC+)** – Most people who get BC+ now will continue to get BC+ in 2014 if their income stays the same. All adults at or below 100% of the Federal Poverty Level (FPL) are eligible for BC+. Child(ren) and pregnant women are eligible at or below 300% of the FPL.

2013 FPL Guidelines*

Family Size	Monthly Income Limit for Adults (100% FPL)	Monthly Income Limit for Children (300% FPL)
1	\$958	\$2,873
2	\$1,293	\$3,878
3	\$1,628	\$4,883
4	\$1,963	\$5,888
5	\$2,298	\$6,893

*Note: FPL limits are subject to change

In addition to the changes required by the ACA, the Governor's 2013-2015 Biennial Budget includes changes to BC+ income limits. To communicate these changes to affected households with income over the new income limits, the Department of Health Services (DHS) sent a letter to BC+ recipients in late September 2013. The letter informed recipients that their BC+ eligibility will be ending January 1, 2014, provided information on the Marketplace, and encouraged them to use the Marketplace to begin the process of choosing an alternative insurance plan. As outlined in detail in DHS [Operations Memo 14-01](#), the effective date of new income limits for existing BC+ members has since been changed to April 1, 2014.

3. **Health Insurance Marketplace** - The ACA established the Federally Facilitated Marketplace (FFM). The Marketplace is where individuals and families who do not qualify for Medicaid or BC+ can shop for and purchase a QHP, and find out what help is available to pay for health insurance. Individuals and families can use the Marketplace to apply for Advance Premium Tax Credits (APTCs). These tax credits will lower premium payments for people between 100% and 400% of the FPL if they purchase a QHP through the Marketplace. Individuals with household income under 250% of the FPL may also qualify for Cost-Sharing Reductions (CSRs) through the Marketplace. CSRs are discounts that lower the amount people have to pay out of pocket for deductibles, coinsurance, and copayments.

Applying for Health Insurance - An application to the Marketplace also serves as an application for BC+ and Medicaid. When an individual applies at the Marketplace and is determined eligible for BC+ or Medicaid, the Marketplace will transfer their application to the appropriate [Income Maintenance \(IM\) Consortia](#). IM agencies will begin processing BC+ application routed from the Marketplace in 2014, once Wisconsin begins receiving these applications. (See [Operations Memo 13-25](#) for processing timelines and DHS [Operations Memo 14-02](#) for details on how these applications will be processed.)

Conversely, an application for BC+ is also an application to the Marketplace. Starting February 2014, Wisconsin's DHS will transfer applications determined ineligible for BC+ to the Marketplace for APTC and CSR determinations.

The ACA requires that Wisconsin use the Marketplace's tax-based rules to determine eligibility for BC+. These rules, called Modified Adjusted Gross Income (MAGI) rules, use tax filing rules and relationship rules to determine household composition and income calculations for BC+.

Impact on W-2 Applicants and Participants - The new MAGI rules and 2013-2015 Biennial Budget BC+ income limit changes will affect a small number of current W-2 participants. Most will continue receiving health insurance through BC+. However, adult participants with incomes above 100% of the FPL will lose BC+ eligibility April 1, 2014, and must find new insurance through the Marketplace. These participants must complete the Marketplace application process, including any premium payments by March 15, 2014, in order to be covered under a QHP by April 1, 2014. As a reminder, W-2 agencies may not use W-2 funds to pay for premium payments.

Financial Employment Planners (FEPs) are encouraged to refer applicants and participants to <http://www.dhs.wisconsin.gov/health-care/> or <http://badgercareplus.org/> for information about BC+ eligibility, and healthcare.gov for information about the Marketplace.

Impact on Refugees - Newly arriving refugees will be eligible for BC+ upon arrival, even if they do not have dependent children. Refugee adults on BC+ who become employed and whose income is above 100% of the FPL will transition to Refugee Medical Assistance (RMA) without a means test for the duration for the eight-month RMA eligibility period. Child(ren) will also be automatically enrolled in RMA for the duration of the eight-month eligibility period if the family's income is above 300% of the FPL.

SUMMARY OF CWW CHANGES

To accommodate the MAGI rules and 2013-2015 Biennial Budget BC+ income limit changes, several changes will be made to CARES Worker Web (CWW).

The changes with light grey shading are informational only, and will not impact W-2 applications, reviews, person adds, person delete, or changes.

Changes to the remaining pages will impact W-2 applications, person adds, person delete, or change reports. Additional details regarding these changes are provided in the **DETAILED DESCRIPTION OF CWW PAGE CHANGES IMPACTING W-2** section of the memo.

CWW Page	Description of Change
Individual Name Display across Certain CWW Pages	Adds new indicators to the display of the individual's name, age, and relationship to the primary person if an individual is 1) a tax dependent/co-filer living outside the household, or 2) a deceased tax dependent. (See Household Members page example)
Household Members	Adds two new questions to determine if an individual is relevant to the BC+ case.

Application/ Review Interview Details	Allows Health Care and Family Planning Wavier (FPW) renewals to be initiated independently from other programs, including W-2. For more information about changes that impact W-2 reviews, see Operations Memo 14-J1.
Household (HH) Relationships	Renames the existing field Is Tax Dependent of to Is LTC Tax Dependent of . This field is only used for long-term care programs.
Relevance Results	Changes CWW logic to make tax dependents and tax co-filers who live outside the household relevant to the BC+ case. These individuals will not be relevant to the W-2 case.
Current Demographics	Adds a question that is pre-populated at application based on the new questions added to the Household Members page. This information is necessary to correctly establish the proper living arrangement. After the field is populated, FEPs will have to manually update the information.
School Enrollment	Requires BC+ workers to verify High School Graduation Status and Enrollment Status for individuals between 16 1/2 and 19 years old. BC+ workers must also verify Expected Date of High School Graduation for 18 year olds to determine if they are dependent 18 year olds. NOTE: This is not automated for W-2. A similar change will be made for W-2 in the next CWW release.
Individual Non- Financial Gatepost	Changes the question, Is there anyone in your household under 21 who is receiving out of home care when s/he turned 18? , to “. . . under age 26 . . . ” to explore BC+ eligibility for Former Foster Care Youth.
Pregnancy	Changes logic to no longer require pregnancy verification for BC+ unless questionable.
Employment Summary	Adds new columns to reflect the collected data for the Monthly MA Gross Amount and the Monthly BC+ Taxable Amount .
Employment	Adds a new employment type to the drop-down list and a new subsection to the page.
Self-Employment	Adds a new business type to the drop-down list.
Unearned Income Gatepost	Adds two new unearned income types and reorders the list.
Unearned Income Details	Adds two new unearned income types to the drop-down list. Adds a new field, BC+ Taxable Amount to the Details section.
Educational Aid	Counts or disregards education aid as unearned income for W-2, depending on the type of aid received.
BC+ Tax Deductions	Adds a new tab in the Navigation Menu. The BC+ Tax Deductions tab contains links to Summary , Gatepost , and Detail pages.

Tax Filing Information	Adds a new tab in the Navigation Menu. The Tax Filing Information tab contains links to Summary and Detail pages.
Generate Summary	Adds new Health Care program information to the Case Summary PDF that prints from this page.
BC+ Core Plan	This page will no longer be used to determine eligibility for childless adults. It will be used to complete renewals for childless adults through December 2014.
Budget and Post Eligibility Changes	Adds new budget pages specific to MAGI rules based on the eligibility determination for BC+ and FPW.
Driver Flow Changes	Schedules new CWW pages in the driver flow when a FEP processes a mixed case at intake, program add, person add, or person delete.

DETAILED DESCRIPTION OF CWW PAGE CHANGES IMPACTING W-2

This section contains detailed descriptions of changes that W-2 workers must be aware of due to the potential impact on W-2.

Individual Name Display across Certain CWW Pages

On certain CWW pages that display individual household member's names, the following new indicators have been added to identify when someone may be living outside of the home, but counted in the BC+ Group.

MAGI Indicator	Description of Indicator
OTX	Tax Dependent/Tax Co-Filer living outside of the household
DEC	Deceased Individual that will remain on the case for the tax year
DTX	Deceased Tax Dependent that will remain on the case for the tax year

These new indicators will help FEPs identify which individuals have been added to the case because they are tax co-filers or tax dependents living outside the home. FEPs must not delete these individuals from the case without checking tax filing or tax dependency status.

Process Reminder When Removing the Primary Person from the Home

When the Primary Person (PP) on the case moves out of the home or dies, the process has not changed. The FEP must close the case. If the PP is part of a two-parent case, the FEP must close and the second parent must apply and become the PP. The PP will not have a new indicator and may not be deleted from the case.

Below is an example of a household member's name with the new MAGI indicator from the **Household Members** page.

Household Members Cancel Reset

Total: 5

Current Household Members		
AMBER ROMANCE 33F PP	TIMOTHY ROMANCE 17M SON	LILLY ROMANCE 3F DAU
KARI ROMANCE 0F DAU	GEORGE ROMANCE 37M FRD (OTX)	BLUE ROMANCE 18F NOT
IVY ROMANCE 18F NOT		

Household Members

Household Members Cancel Reset

Total: 5

Current Household Members		
AMBER ROMANCE 33F PP	TIMOTHY ROMANCE 17M SON	LILLY ROMANCE 3F DAU
KARI ROMANCE 0F DAU	GEORGE ROMANCE 37M FRD (OTX)	

Birth Date: 03/27/1980 Communication: INQUIRY STATUS: UNEMPLOYABLE

Estimates for Relevance Determination

Age Category: 22 and older Serves as Alien Sponsor:

* Does this individual meet any of the following criteria:

- Tax dependent of someone in the household
- Tax co-filer with someone in the household
- Claiming their adult child and both are living in the household

Is this individual living outside of the household or deceased?

The following new questions have been added to the **Household Members** page:

1. **Does this individual meet any of the following criteria:**
 - **Tax dependent of someone in the household**
 - **Tax co-filer with someone in the household**
 - **Claiming their adult child and both are living in the household**
2. **Is this individual living outside of the household or deceased?**

FEPs are not able to answer these new questions. The response fields are enabled only for IM workers processing cases with household level Health Care requests. However, when an individual moves in or out of the home or dies, the FEP must be aware of the individual's tax status and take the proper steps when removing or adding the individual to the case.

Process Reminder Regarding W-2 Case Closure, Person Add, and Person Delete

The W-2 case closure, person add, and person delete process has not changed when the individual is not part of the W-2 Group. When a FEP adds or deletes a person from the W-2 Group, the FEP must refer to [Operations Memo 13-09](#) for procedural steps.

The scenarios below provide the step-by-step process of how FEPs must now remove or add tax dependent or tax co-filer individuals who are a part of the W-2 Group:

Scenario	Tax Dependent or Tax Co-filer	Not a Tax dependent or tax Co-filer
<p>Moving out of the home</p>	<ol style="list-style-type: none"> 1. On the Current Demographics page, change the answer to the question: Is this a tax dependent or a tax co-filer living outside of the household? to Yes. 2. Run eligibility and confirm the results removing the individual from the W-2 Group. 3. Add a case level comment describing the change. 	<p>No change in processing.</p>
<p>Deceased</p>	<ol style="list-style-type: none"> 1. Complete the Date of Death and Verification fields on the Permanent Demographics page. 2. Change the response to the question Is this individual a tax dependent or tax co-filer living outside of the household? to Yes on the Current Demographics page. Do not change the Living Arrangement type. 3. Run eligibility and confirm W-2. 4. Add a case level comment describing the change. <p>The individual will be coded with a DTX indicator and removed from all assistance groups except BC+.. FEPs must not delete individuals coded as DTX from the case.</p> <p>At the end of the tax year, the</p>	<p>No change in processing.</p>

	<p>primary worker will receive an alert informing him or her that the deceased individual can now be deleted from the case.</p>	
<p>Person Add</p>	<p>When the FEP adds an individual to the household, the FEP must document the details including name, age, and relationship to the Primary Person in case level comments. The new questions on the Household Members page will default to No. CWW will generate Alert 500 - Person Moved into Household to the primary worker so that that the primary worker can collect the tax information, if necessary.</p>	

Current Demographics

Current Demographics Cancel Reset

Individual Demographic Information

Effective Period
 * Begin Month: 10 / 2013 Last Updated: 10/02/2013

Individual Details

* Individual: AMBER ROMANCE 33F PP

Child Out of Home Details

* Is this a child living outside this home and in Foster Care or court-ordered Kinship Care?

Are the parents / caretakers cooperating to re-unite with this child? Verification:

Tax Dependent / Tax Co-Filer Out of Home Details

* Is this individual a tax dependent or tax co-filer living outside of the household?

Enter New Begin Month: MM / YYYY

In order to allow tax dependents and co-filers living outside of the home to exist on a case, but not open for benefits, the **Tax Dependent / Tax Co-Filer Out of Home Details** section was added to the **Current Demographics** page to indicate the actual living arrangement of these individuals. CWW will pre-populate the new question **Is this individual a tax dependent or a tax co-filer living outside of the household?** based on the information entered on the **Household Members** page.

When a tax dependent or tax co-filer moves out of a home, FEPs must not change the living arrangement code. Instead, they must change the pre-populated answer. (See Scenario chart under **Household Members**).

Policy and Process Reminder Regarding Temporary Absence of a Child

The Temporary Absence of a Child policy and process has not changed. When a FEP learns that a child in the W-2 Group is temporarily out of the home, the FEP must follow the policy in W-2 Manual [2.8.2](#) and refer to [Operations Memo 07-20](#) for procedural steps.

Pregnancy

BC+ no longer requires pregnancy verification unless deemed questionable. The **Pregnancy Verification** fields will be defaulted to NQ - Not Questionable.

Questionable Pregnancy Verification for W-2 Only Cases

FEPs must verify pregnancy for an individual whose **Target Type** on the **W-2 Request** page is P – PREGNANT WOMAN. To request verification of pregnancy, the FEP must enter the verification code PN - NOT YET VERIFIED FOR W-2 OR CHILD CARE in the **Pregnancy Verification** field and allow the individual seven working days from the date the verification request is made to provide the needed verification (See W-2 Manual [4.1.3](#)). If the individual does not return the required pregnancy verification, the FEP must enter the verification code FN – NEVER VERIFIED FOR W-2 OR CHILD CARE in the **Pregnancy Verification** field and deny and or close the case for the W-2 program.

Questionable Pregnancy Verification for Mixed Cases

When the W-2 verification due date is before the IM verification due date and verification is not received:

1. Follow the directions listed above when requesting verification of pregnancy.
2. The FEP must run eligibility with a date, confirm, and coordinate with the IM worker to confirm the case for other programs. (See [Operations Memo 13-09](#))
3. The IM worker will then need to re-pend the case for IM programs and suppress the Verification Checklist (VCL) that is generated.

When the IM verification due date is before the W-2 verification due date:

1. If a FEP needs pregnancy verification and the IM worker has already entered ?-NOT YET VERIFIED or Q?-QUESTIONABLE NOT YET VERIFIED in the **Pregnancy**

Verification field, the FEP must leave the ? or Q? and must not change the verification code to PN.

2. The FEP must review the Verification Checklist for the due dates. If the IM due date is sooner than the W-2 due date, the FEP must provide the applicant with the [Request for Verification form \(2303\)](#), manually track the due date, and add a case level case comment stating the W-2 verification due date.
3. If the individual fails to submit verification by the IM due date, the IM worker will enter NV-NOT VERIFIED or QV-QUESTIONABLE NOT VERIFIED in the **Pregnancy Verification** field and fail BC+.
4. W-2 and IM will need to coordinate confirming the case closure on the same day. After the IM worker confirms the failure for BC+, then the FEP will need to re-pend W-2 for pregnancy verification by entering PN in the **Pregnancy Verification** field and suppress the VCL. The W-2 due date remains the initial date established on the [Request for Verification form \(2303\)](#).

Temporary New Verification Codes for Employment, Self Employment, and Unearned Income pages

Because of ACA rules, DHS must allow BC+ eligibility without verifying income for certain health care applications received from the FFM with application dates of October 1 through December 31, 2013. Therefore, DHS created two new verification codes that pend or fail all other programs without impacting eligibility for health care.

These new codes are:

- FP - Federally Facilitated Marketplace Pend; and
- FF - Federally Facilitated Marketplace Fail.

When a FEP adds W-2 to an existing BC+ case and the verification code **FP** is in the verification field on the **Employment, Self Employment, or Unearned Income** pages, then the FEP must retain the existing FP code, which will pend W-2 for income verification. The FEP must allow seven working days from the date the verification request is made to provide the needed verification (See W-2 Manual, [4.1.3](#)). If verification is received, the FEP must enter the appropriate verification code. If verification is not received by the due date, the FEP must change the **FP** code to **FF** to fail W-2 for lack of verification. The FEP must coordinate with the IM worker to confirm the case.

When a W-2 case is created before a BC+ case, the IM worker will not remove verification codes from shared verification fields. The IM worker will use the BC+ taxable override field to add the income reported by the FFM. When Self Employment is being reported through the FFM, the IM worker will use the BC+ Tax Deductions to adjust the BC+ Self Employment income if it differs from the income verified with W-2.

For ongoing cases, when participants report new income or income changes, the FEP must not use the **FP** code because the BC+ worker will also need to verify this new or pend income.

Please refer to DHS [Operations Memo14-02](#) that provides more direction on the new verification codes.

Employment

The screenshot shows a software interface for entering employment data. It is divided into three main sections:

- Employment Information:** Contains fields for 'Effective Period' (Begin Month: 10 / 2013, End Month: MM / YYYY, Last Updated:), and 'Delete Reason:'.
- Employer Information:** Contains fields for 'Individual:' (AMBER ROMANCE 33F PP) and 'Sequence: 0'.
- Employment Description:** Contains multiple rows of fields:
 - Employee Type: PE - Permanent
 - Job Title for Health Insurance: MA - Manager
 - Employment Type: M - AMERICORPS** (highlighted with a green circle)
 - Verification: AF - AGENCY FORM
 - Begin Date: MM / DD / YYYY
 - First Pay Check Date: MM / DD / YYYY
 - Employment Ended?: No
 - Employment End Date: MM / DD / YYYY
 - Date Of Last: MM / DD / YYYY

The M-AMERICORPS employment type has been added to the **Employment Type** drop down list because BC+ now counts income from the AmeriCorps program as earned income.

When determining W-2 eligibility, income from the AmeriCorps VISTA program is counted if it is equal to or greater than the minimum wage equivalent. To ensure that CWW correctly counts this income, FEPs must use the M-AMERICORPS employment type for individuals employed by the AmeriCorps VISTA program. (See W-2 Manual [3.2.9.2](#))

A new subsection **BC+ Pre-Tax Deductions** has been added to the **Detailed Wage Information** section on this page to collect pre-tax deductions in order to calculate monthly income for BC+ This new subsection will not be required for FEPs.

Self-Employment

Self Employment
Cancel Res

Effective Period

* Begin Month: / End Month: / Last Updated: 10/14/2013

Delete Reason:

Additional Information

* Individual: **AMBER ROMANCE 33F PP** Sequence: **1**

Business Name: Business Tax ID:

* Business Type: **RO - ROYALTIES** Business Ownership Type: **OT - Other**

Business Start Month: / Significant Change Month: /

Most Recent Business Taxes Filed Year:

* Self-Managed? **Yes**

Monthly Hours: Verification: **AF - AGENCY FORM**

* Number of Months For Average:

Details

Gross Income: \$. Verification:

Gross Expenses: \$. Verification:

Depreciation Amount: \$.

Other Disallowed Expenses: \$. Delete

Gross Income	Verification	Gross Expense	Verification	Depreciation Amount	Other Disallowed Expense	Delete
10.00	AF - AGENCY FORM	0.00		0.00	0.00	<input type="checkbox"/>

Obsolete Information

* Income Discontinued? * Date Loss Of Income Reported: / /

Because of MAGI tax rules, if the individual is receiving royalty income, then this income must be captured on the **Self Employment** page by selecting **RO - ROYALTIES** from the **Business Type** drop down menu.

Royalties income will be counted as unearned income and display on the **Budget** page under unearned income. It is collected on the **Self Employment** page because it is counted as earned income for Medicaid for the Elderly, Blind, and Disabled.

Unearned Income Gatepost

Unearned Income Gatepost Cancel Reset

Effective Period
Last Updated: **10/02/2013**

Unearned Income

Does anyone in your household receive income from any of these sources?

* AA - Adoption Assistance:	<input type="text" value="N - No"/>	* AN - Annuities:	<input type="text" value="N - No"/>
* CH - Charitable Contributions:	<input type="text" value="N - No"/>	* CS - Child Support / Maintenance / Alimony:	<input type="text" value="N - No"/>
* DI - Sick / Disability Benefits:	<input type="text" value="N - No"/>	* DV - Dividends:	<input type="text" value="N - No"/>
* FO - Foster Care:	<input type="text" value="N - No"/>	* GR - General Relief:	<input type="text" value="N - No"/>
* IN - Interest:	<input type="text" value="N - No"/>	* KC - Kinship Care:	<input type="text" value="N - No"/>
* MA - Military Allotment:	<input type="text" value="N - No"/>	MN - Maintenance / Alimony:	N - No
* MO - Money From Other Person:	<input type="text" value="N - No"/>	* NA - National Refugee Relief:	<input type="text" value="N - No"/>
* OT - Other:	<input type="text" value="N - No"/>	* PA - Assistance In Another State:	<input type="text" value="N - No"/>
* PC - Personal Capital Gains:	<input type="text" value="N - No"/>	* PE - Other Pension / Retirement:	<input type="text" value="N - No"/>
* PS - Payments From Property Sold:	<input type="text" value="N - No"/>	RE - RNIP:	N - No
* RR - Railroad Retirement:	<input type="text" value="N - No"/>	* SI - Supplemental Security Income:	<input type="text" value="N - No"/>
* SS - Social Security:	<input type="text" value="N - No"/>	* TC - Tribal Per Capita Income:	Y - Yes
* TR - Trust Fund:	<input type="text" value="N - No"/>	* TT - Tribal TANF:	<input type="text" value="N - No"/>
* UN - Unemployment Insurance:	<input type="text" value="N - No"/>	* VE - Veteran Benefits:	<input type="text" value="N - No"/>
* WC - Workers Compensation:	<input type="text" value="N - No"/>		

Educational Aid

* Does anyone in your household receive educational aid?

Two new unearned income types have been added to the **Unearned Income Gatepost** page: PC-PERSONAL CAPITAL GAINS and TI-TRIBAL PER CAPITA INCOME. W-2 policy is not changing and personal capital gains and tribal per capita income will continue to be treated as unearned income. (See W-2 Manual, [3.2.9.2](#))

Enhancements have been made to the **Educational Aid** page, automatically counting or disregarding various types of aid received. If a W-2 applicant or participant is receiving Educational Aid, then the question in the **Educational Aid** section must be answered Y-Yes to schedule the detail page.

Unearned Income Details

Unearned Income Cancel Reset

Effective Period

* Begin Month: / End Month: / Last Updated:

Delete Reason:

Income Information

Income Available? Yes No Monthly Contribution Amount: \$

Monthly MA Amount: \$

Monthly BC+ Taxable Amount: \$

Disregards, Expenses and Losses

SSI Pass Account Amount: \$

Disregards:

Monthly Personal Capital Losses: \$

Details

Delete	Gross Income Amount	Verification
<input type="checkbox"/>	\$ <input type="text"/>	<input type="text"/>
	BC+ Taxable Amount	Verification
	\$ <input type="text"/>	<input type="text"/>

Reset Add

Gross Income Amount	Verification	BC+ Taxable Amount	Verification	Delete
<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="checkbox"/>

Calculate

When the unearned income types are AN - ANNUITIES or PE - OTHER PENSION/RETIREMENT, the new **Monthly BC+ Taxable Amount** field will be enabled. If the amount is not available, the FEP should leave this field blank. After the FEP enters the **Gross Income Amount** and presses the **Calculate** button, the **Monthly BC+ Taxable Amount** field will populate with the gross income amount.

The **Disregards & Expenses** section has been renamed **Disregards, Expenses, and Losses**. Losses are not relevant to W-2 and this section does not apply to W-2.

Educational Aid

FEPs must use the **Educational Aid** page to record an applicant or participant’s educational aid income. The **Educational Aid** page will count or disregard the income entered based on each program’s policies. (See W-2 Manual, [3.2.9.1](#), #11)

Driver Flow Changes

The following new CWW pages will be scheduled in the driver flow when a FEP processes a mixed case at intake, program add, person add, or person delete:

1. **BC+ Tax Deductions Gatepost**
2. **Tax Filing Details**

Tax Filing Details Cancel Res

Household Tax Information

Effective Period

* Begin Month: 10 / 2013 Last Updated: 10/02/2013

Tax Year: 2013

Household Filing Status

* Is Anyone In The Household Filing Taxes? Y - YES Add Additional Tax Filer

Individual Tax Information Delete

Tax Filer Details

Tax Filer	Delete Reason
AMBER ROMANCE 33F PR	
WY ROMANCE 18F NOT	N - NO
	N - NO
	N - NO

Bypassing the BC+ Tax Deduction and Tax Filing Details Pages

If an IM worker begins processing a BC+ ACCESS application and stops prior to completing the **BC+ Tax Deductions** and **Tax Filing Details** pages in the driver flow and the FEP then tries to take action on the case, the FEP will be unable to move past these pages. To resolve this, the FEP must ask the IM worker to finish the driver flow past these pages.

Once the FEP is able to bypass these pages, the FEP must not change any verification entries already entered on these pages. If a verification entry is required, FEPs must enter ?-NOT YET VERIFIED. FEPs must document in case level case comments any actions taken to bypass these pages.

TRAINING

The [BWF Partner Training Service \(PTS\) Learning Center](#) will provide distance learning materials on the impact of the Affordable Care Act on W-2 in the PTS Coach's Corner. The W-2 Scenarios and Related Actions for MAGI (Modified Adjusted Gross Income) Desk Aid also provides instructions on entering a case in CWW in light of the new changes.

AGENCY ACTION

W-2 agencies must discuss the CWW changes with staff and update any relevant local agency procedures.

CONTACTS

For W-2 Policy Questions in the Balance of State: Bureau of Regional Operations, W-2 Regional Coordinators

For W-2 Policy Questions in Milwaukee: Milwaukee Operations Section Regional Administrators

For CARES Processing Questions: W-2 Help Desk

DCF/DFES/BWF/DVD