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

FROM: Margaret McMahon, Bureau Director mmm/ee  
Bureau of Working Families  
Division of Family and Economic Security  
Department of Children and Families

<b>BWF OPERATIONS MEMO</b>					
No:	19-07				
DATE:	02/25/2019				
W-2	<input checked="" type="checkbox"/>	EA	<input type="checkbox"/>	CF	<input type="checkbox"/>
JAL	<input type="checkbox"/>				
RAP	<input type="checkbox"/>	TMJ	<input type="checkbox"/>	TJ	<input type="checkbox"/>
Other EP	<input type="checkbox"/>				

**SUBJECT: Updates to the CARES Worker Web Liquid Assets Page**

**CROSS REFERENCE:** [DHS Operations Memo 19-07: Reasonable Compatibility for Assets for Medicaid](#)

**EFFECTIVE DATE:** March 2, 2019

**PURPOSE**

The purpose of this memo is to announce updates to the CARES Worker Web (CWW) Liquid Assets Page.

**BACKGROUND**

To comply with health care federal requirements, the Department of Health Services must make updates to the CWW Liquid Assets page. Asset verification is required for both Elderly, Blind, and Disabled (EBD) Medicaid and Wisconsin Works (W-2). The updates to the Liquid Assets page will impact W-2 when there is any medical assistance, including BadgerCare Plus, requested on the case.

**POLICY**

There are no policy changes associated with this memo.

**CARES WORKER WEB**

A new health care only **AVS Amount** field will be added to the Liquid Assets page.

For W-2, FEPs should consider asset verification system (AVS) data as information known to the agency when determining eligibility for W-2. However, since the overlap between individuals enrolled in both EBD Medicaid and W-2 is very small, and this information is not likely to be available in most situations.

The name of the current Asset Amount field will be changed to **Self-Reported Amount** to distinguish it from the AVS Amount.

The screenshot shows the 'Liquid Assets' form interface. At the top, there are 'Cancel' and 'Reset' buttons. The form is organized into sections: 'Effective Period' containing 'Begin Month', 'End Month', and 'Last Updated' fields; 'Delete Reason' with a dropdown menu; 'Additional Information' containing 'Individual', 'Type', 'Jointly Owned?', 'Burial?', 'Self-Reported Amount', 'Balance Date', and 'AVS Amount' fields. The 'Self-Reported Amount' field is highlighted with a red box and includes a 'Balance Date' field with a calendar icon. There are also 'Verification' and 'Available?' fields.

A new **Balance Date** field will be added in association with the Self-Reported Amount field. This field will be enabled only if there is a request for health care and will be used by IM workers to determine whether AVS information or asset verification provided by the individual is more recent.

The Balance Date field will be required for both FEPs and IM workers if there is a request for medical assistance on the case, the individual has provided proof of the asset amount, and a valid verification code has been selected for the Self-Reported Amount verification. Workers must enter the most recent balance date shown on the verification document provided.

**Example:** Tanisha provides a bank statement that was issued by her bank on February 5, 2019. The statement shows the transaction history for the month of January 2019, from January 1-31. The worker should enter a balance date of **01/31/2019**, even though the statement date is 02/05/2019.

**TRAINING**

The *CARES Worker Web (CWW) Application Entry Desk Aid* will be updated to reflect the changes described in this memo.

**CONTACTS**

For W-2 CARES Processing Questions: W-2 Help Desk

DCF/DFES/BWF/GS