

CBMS Adult Financial Wrap Up Updates

June 2021

Summary

This project will allow the eligibility user to clearly see countable Adult Financial Resources in Wrap Up so they can verify that all countable resources were calculated correctly for all individuals prior to authorizing benefits to the client. This will result in a better user experience and fewer payment errors.



Example

Application dated 12/10/2020 for Adult Financial (Client Only).
Client provides verifications for the following countable Resources:

Resource Type	Countable Amount
Checking Account	\$100.00
Life Insurance Policy	\$900.00
Personal Property	\$500.00
Annuity	\$100.00
Vehicle	\$300.00



Results

The Client meets eligibility for the Adult Financial program.

In Wrap-up the following will be displayed for the countable resources at the program level:

Adult Financial Eligibility Resource Test	
Countable Real Property Value	\$0.00
Countable Vehicle Net Market Value	\$300.00
Countable Liquid Assets Value	\$1100.00 (Checking Account + Life Insurance + Annuity)
Countable Personal Property Value	\$500.00

In Wrap-up the following will be displayed for the countable resources at an individual level:

Individual Summary	
Countable Real Property Value	\$0.00
Countable Vehicle Net Market Value	\$300.00
Countable Liquid Assets Value	\$100.00
Countable Personal Property Value	\$500.00
Countable Annuity/Promissory Value	\$100.00
Countable Life Insurance	\$900.00
Countable Burial	\$0.00