



**Wisconsin Shares**

**EBT CSAW User Guide**

**Authorizations**

**Processing Various Change Scenarios**

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Division of Early Childhood Education

**Contents**

Background Information ..... 3

Processing Various Changes to a Case/Authorization – Authorization Status is Pending or Completed..... 3

    Modifying Parent Approved Activity Schedule ..... 3

    Parent Approved Activity Record with a Begin Date in the ..... 4

    An Eligible Adult is added to the Case ..... 7

    An Eligible Adult leaves the Case ..... 8

    Child attends a Second Provider ..... 8

    Changing Providers ..... 8

    Child’s Copay Type or Special Needs Status Changes..... 9

    A New Child is added to the Case ..... 10

Processing Various Changes to a Case/Authorization – Authorization Status is Processed..... 11

    Modifying Parent Approved Activity Schedule ..... 11

    An Eligible Adult is added to the case ..... 14

    An Eligible Adult leaves the case..... 15

    Child attends a Second Provider ..... 16

    Changing Providers ..... 16

    Child’s Copay Type or Special Needs Status Changes..... 17

    NOTE: If the copay type is changed with an effective date in the past or current month, an  
 adjustment might be necessary using the PLBC module..... 19

    A child is added to the Case ..... 19

    Adding/Modifying Scheduled School Closed Hours after a Regular Authorization is in Processed status  
 ..... 20

Changes that do not require action in EBT CSAW ..... 21

## Background Information

This user guide explains how to process various changes in EBT CSAW that effect authorizations. The process differs based on the status of the authorization. If the authorization is in *Processed* status, the system restricts some modifications because the funds have already been loaded to the card. If adjustments that pertain to current or past months need to be made to authorizations that are in *Processed* status, those changes must be calculated using the *Post Load Benefit Calculation (PLBC)* module.

Below is a list of possible statuses for an EBT authorization.

- **Pending:** The system assigns this status when the *New Authorization – Basic Details* screen has been completed. Note that pending authorizations are not automatically deleted but remain in pending status indefinitely.
- **Pending Derive Hours:** When details pertaining to an authorization in *Completed* status are changed (such as parent schedule, begin and end dates of the authorization, etc.), the system changes the authorization status to *Pending/Derive Hours*. In order to mark the authorization to *Completed*, the child’s schedule must be reviewed and hours recalculated by clicking *Derive Hours* button on the *Child Schedule* screen. Note that pending authorizations are not deleted but remain in pending status indefinitely.
- **Completed:** Once all schedules (parents and child), child copay/special needs information and the authorization weekly hours have been calculated, the worker changes the status to *Completed*. Authorizations must be in complete status before the benefits can be calculated.
- **Processed:** Authorizations that are in *Completed* status and the benefits have been calculated at the end of the business day will be changed to *Processed* when the funds have been loaded onto the card (Phase 1 – October 1, 2016, Phase 2 – February 5, 2017).

## Processing Various Changes to a Case/Authorization – Authorization Status is **Pending** or **Completed**

This section gives guidance on how to process various changes to a case/authorization when the authorization is in either *Pending* or *Completed* status.

### ***Modifying Parent Approved Activity Schedule***

The parent’s approved activity can change for multiple reasons. Examples include, but not limited to:

1. Parent’s approved activity type changes (W2 to Employment)
2. Parent changes employment
3. Parent’s work schedule changes (reduced or increased hours)
4. A parent leaves the case or a new eligible adult is added

Every time any of the above circumstances change, the *Parent Approved Activities* record and the authorization with child's need must be updated.

Below are steps on how to process the change when the authorization status is *Pending* or *Completed* status when the funds have not been loaded onto the card yet.

## Parent Approved Activity Record with a Begin Date in the Future

If the begin date of the *Parent Approved Activity* record in EBT CSAW is in the future, the records must be deleted.

Click on the *Delete* icon next for the record that needs to be deleted.

Parent Approved Activity Schedule			
Parent's Name	Date of Birth	PIN	
Olivia October	01/01/1985	7585077157	<a href="#">Add Schedule</a>
CWW Approved Activity	Schedule Period	Status	
Employment	09/01/2016 - 08/31/2017	Completed	

On the *Delete Activity Schedule* screen, click on the *Confirm Delete* checkbox and then *Delete Activity Schedule* button.

Delete Activity Schedule	
<b>CWW Approved Activity</b>	Employment
<b>Effective Begin Date</b>	09/01/2016
<b>Effective End Date</b>	08/31/2017
<b>Status</b>	Completed
<b>Confirm Delete *</b>	<input checked="" type="checkbox"/>
<input type="button" value=" &lt; Back"/> <input type="button" value=" Delete Activity Schedule"/>	

You will receive a warning message stating that there are authorizations in *Completed* status and that those will be changed to *Pending (derive hours)* status. Proceed with deletion.

If the begin date of the current parent activity record in EBT CSAW is **before** the implementation date (Phase 1 – 10/1/16, Phase 2 – 2/5/17), the parent activity needs to be end dated and a new record created.

## Parent Approved Activity Record with a Begin Date in the Past

On the *Parent Approved Activity Schedule* screen, modify the record by clicking on the *Modify* icon.

Parent Approved Activity Schedule			
Parent's Name	Date of Birth	PIN	
Olivia October	01/01/1985	7585077157	<a href="#">Add Schedule</a>
CWW Approved Activity	Schedule Period	Status	
Employment	09/01/2016 - 08/31/2017	Completed	

On the *Modify Activity Schedule – Select Period* screen, enter the end date when the parent’s activity changed.

Individual Details	
<b>Name</b>	Olivia October
<b>Date of Birth</b>	01/01/1985
Modify Activity Schedule	
<b>CWW Approved Activity</b>	Employment
<b>Effective Begin Date *</b>	9/1/2016
<b>Effective End Date *</b>	9/28/2016
<b>Status</b>	Completed
View Schedule Events	

Click *Modify* to proceed. You will receive a warning message stating that there are authorizations that use this activity schedule. Proceed with modification.

### Add New Approved Activity Record

After deleting or end dating the old record, create a new one by clicking on the *Add Schedule* link.

Parent Approved Activity Schedule			
Parent's Name	Date of Birth	PIN	
Olivia October	01/01/1985	7585077157	Add Schedule
CWW Approved Activity	Schedule Period	Status	
Employment	09/01/2016 - 09/28/2016	Completed	  

Add the effective dates for the new activity. On the *Collect Parent Schedule* screen, add the days and times for the new activity as explained in the *EBT CSAW User Guide – Authorizations*: <http://dcf.wisconsin.gov/publications/pdf/5117.pdf>.

### Derive Hours for the Authorization

After the parent’s schedule has been modified, the system automatically changes the status of all authorizations to *Pending (Derive Hours)* status.

To recalculate the authorization hours, click on the *Child Schedule* link.

List of Authorizations in Pending Status							
Child's Name	Date of Birth	Effective Period	Average Weekly Hours	Provider Location Details	Status	Child Schedule	
Olle October	01/01/2011	11/01/2016 - 05/31/2017	15:00	3800036563-001 Randy's Group Care-Do Not Modify 123 Main St , Anytown, WI	Pending (Derive hours)	Child Schedule	  

On the *Authorization – Collect Child Care Need* screen, review the schedule and make changes to the schedule if the child care need has changed. Then click on the *Derive Weekly Hours* button on the bottom of the screen.

On the *Authorization – Weekly Hours* screen, click on the *Review* button on the bottom of the screen.

Hours Based on Schedule		Week	
Hours Based on Schedule		15:00	
Travel Time		00:00	
Total		15:00	
Approved		15:00	

Full Time		Week	
Full Time		15:00	
Above Full Time (50)		00:00	

Average Weekly Hours (Full Time): 15:00  
 Average Weekly Hours (Above Full Time): 00:00

**Average Weekly Authorized Hours: 15:00**  
**Override Hours Related Comments**

0 of 500 characters.

**Location Category**  
 Licensed Group

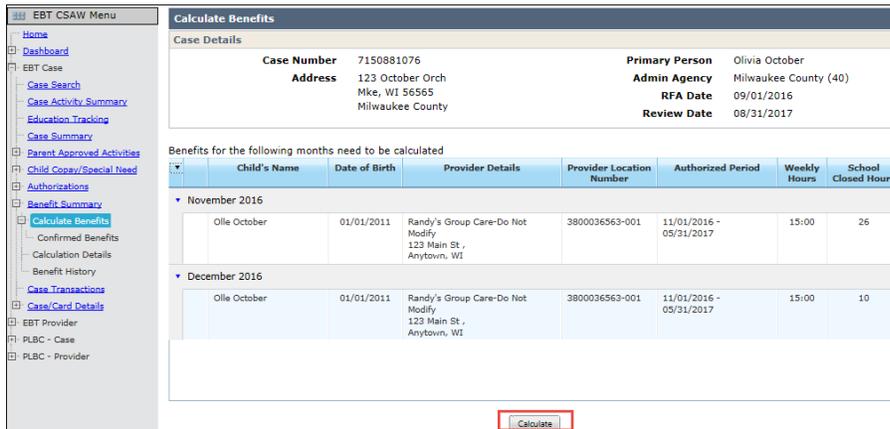
**Provider Price Type \***  
 Part-Time

On the *Authorization Summary* screen, change the authorization status to *Completed*.

### Calculate Benefit

Once the authorization has been marked *Completed*, access the benefit calculation module by clicking first on the *Benefit Summary* link and then on the *Calculate Benefits* link in the navigation menu.

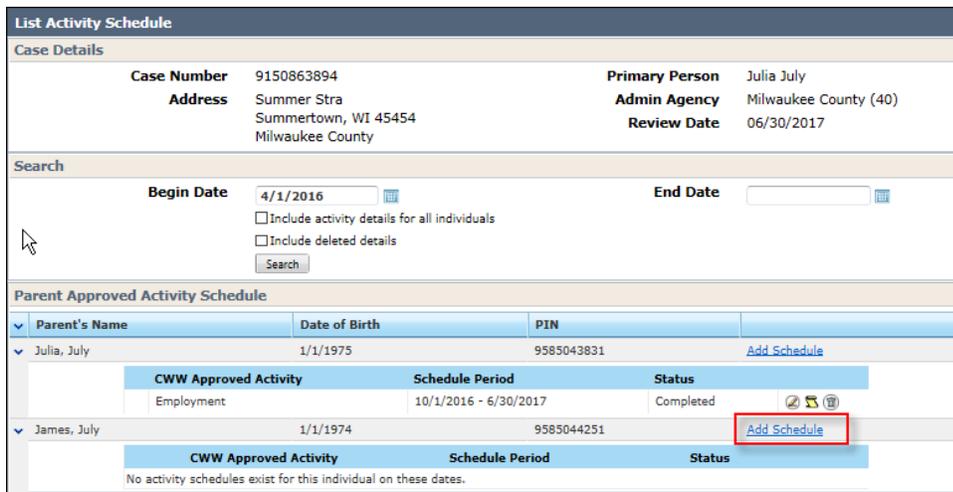
On the *Calculate Benefits* screen, click on the *Calculate* button on the bottom of the screen.



Benefits for authorizations in Phase 1 counties (WREA) will be loaded onto the card during the night. Authorizations in Phase 2 counties will remain in *Completed* status until Phase 2 is implemented in February 2017.

### ***An Eligible Adult is added to the Case***

When an adult is added to the child care case, the approved activity schedule must be added for the newly added parent/adult. On the *Case Summary* screen, click on the *Add Schedule* next to the newly added adult.



Complete the steps listed under the *Creating New Authorizations, Step 1: Parent Approved Activities*, in the *EBT CSAW User Guide – Authorizations*: <http://dcf.wisconsin.gov/publications/pdf/5117.pdf>.

After the newly added adult’s schedule has been entered, review the children’s schedule and derive the hours on the *Collect Child Care Needs* screen for each child in the case. The system will recalculate the weekly hours for each child and will include the newly added parent/adult’s schedule when deriving hours. Follow the steps under *Modifying Parent Approved Activity Schedule* section above (Steps 3 and 4).

### ***An Eligible Adult leaves the Case***

If a parent/adult is no longer included in the child care case, the *Approved Activities* record is deleted if the begin date is in the future. If the begin date is in the past, enter an end date reflecting the date the adult left the case.

Review the schedules for each child in the case and derive hours to make sure the work schedule of the departed adult is no longer considered when calculating the authorized hours. Follow the steps under *Modifying Parent Approved Activity Schedule* section above (Steps 3 and 4).

### ***Child attends a Second Provider***

Sometimes a child needs authorizations to two different providers. Example: A child attends a group center during the week but needs care at a certified provider during weekends when the parent works.

To create an authorization to a second provider, click on the plus (+) sign next to the child who needs a second authorization.

List of Authorizations							
Child's Name	Date of Birth	Effective Period	Average Weekly Hours	Provider Location Details	Status	School Hours	
Calm (Sa) Day	01/01/2010	4/15/2016 - 6/15/2016	05:00	3800036563-001 Randy's Group Care-In-Out Mode 123 Main St, Anytown, WI 52222	Completed	<a href="#">School Hours</a>	

On the following screen, click on the *Search for New Location* link.

Currently Authorized Locations		
Location Name	Address	
*Randy's Group Care-In-Out Mode	123 Main St, Anytown, WI	<a href="#">New Authorization</a>

After that, follow the process described under Step 3 in the *Creating a New EBT Authorization* section of the *EBT CSAW User Guide – Authorizations*: <http://dcf.wisconsin.gov/publications/pdf/5117.pdf>.

### ***Changing Providers***

If the child's authorization from Provider A needs to be changed to a new Provider B, complete the following steps.

#### **Step 1:**

Delete the previously entered authorization by clicking on the *Delete* (trash) icon next to the child's name.

List of Authorizations								
Child's Name	Date of Birth	Effective Period	Average Weekly Hours	Provider Location Details	Status	School Hours	Child Schedule	
Jacob July	01/01/2009	10/1/2016 - 12/31/2016	12:30	3800036563-001 Randy's Group Care 123 Main St, Anytown, WI 52222	Completed	<a href="#">School Hours</a>	<a href="#">Child Schedule</a>	

On the following page, confirm the deletion.

## Step 2:

After the authorization to Provider A has been deleted, click on the *Add Authorization* link next to the child's name to create a new authorization.

Children Eligible with No Authorizations			
Child's Name	Date of Birth	PIN	
Jacob July	01/01/2009	9585043858	<a href="#">Add Authorization</a>
Jim July	01/01/2000	9585043840	<a href="#">Add Authorization</a>

Follow the process described under Step 2 in the *Creating a New EBT Authorization* section of the *EBT CSAW User Guide – Authorizations*: <http://dcf.wisconsin.gov/publications/pdf/5117.pdf>.

## Child's Copay Type or Special Needs Status Changes

If the child's copay type or special needs status needs to be changed, complete the following steps:

### Step 1:

To access the modify screen, click on the *Pencil* icon.

Child Copay/Special Need			
Child's Name	Date of Birth	PIN	
Jacob July	1/1/2009	9585043858	<a href="#">Add Details</a>
	<b>Effective Period</b>	<b>Copay Type</b>	<b>Special Needs</b>
	08/01/2016 -	Regular	Yes

On the *Modify* screen, make the changes.

Modify Child Copay/Special Need	
<b>Case Details</b>	
<b>Case Number</b>	9150863894
<b>Address</b>	Summer Stra Summertown, WI 45454 Milwaukee County
<b>Individual Details</b>	
<b>Name</b>	Jacob July
<b>Date of Birth</b>	01/01/2009
<b>Child Copay/Special Need</b>	
<b>Effective Begin Date *</b>	8/1/2016
<b>Copay Type *</b>	Regular
<b>Special Needs *</b>	<input type="radio"/> No <input checked="" type="radio"/> Yes
<b>Comments</b>	asd fasdfasdf asdfasdfasdf
26 of 500 characters.	
<input type="button" value="Back"/> <input type="button" value="Save and Continue"/>	

Click *Save and Continue* to save the changes.

When there are authorizations in place for the child, you will get the following warning message displayed below; however, you still can proceed.

There are authorizations for this child for this period affected by the change you made. Please make sure child copay/special need details are entered for the child for all the months child has an authorization.

**Step 2:**

Review the authorization for this child and make changes if applicable. To do this, follow the steps under *Modifying Parent Approved Activity Schedule* section (Steps 3 and 4) earlier in this user guide.

***A New Child is added to the Case***

If an eligible child is added to the case, take the following steps:

**Step 1:**

Complete the *Copay/Special Needs* details for the added child.

Child's Name	Date of Birth	PIN							
Baby Lake	07/10/2016	6585059255	<a href="#">Add Details</a>						
<table border="1"> <thead> <tr> <th>Effective Period</th> <th>Copay Type</th> <th>Special Needs</th> </tr> </thead> <tbody> <tr> <td colspan="3">There is no copayment or special needs information for the selected period</td> </tr> </tbody> </table>				Effective Period	Copay Type	Special Needs	There is no copayment or special needs information for the selected period		
Effective Period	Copay Type	Special Needs							
There is no copayment or special needs information for the selected period									

**Step 2:**

Create an authorization for the new child.

Children Eligible with No Authorizations			
Child's Name	Date of Birth	PIN	
Baby Lake	07/10/2016	6585059255	<a href="#">Add Authorization</a>

**Step 3:**

Calculate the benefits. This will change the benefits for all children on the case because the FPL and copay amounts will change.

## Processing Various Changes to a Case/Authorization – Authorization Status is **Processed**

This section gives guidance on how to process various changes to a case/authorization when the authorization is in *Processed* status.

The funds are loaded onto the card the last business day of the month. For new authorizations that span past or current month, the funds are loaded daily. Once the funds have been loaded, the authorization status changes to *Processed*.

### **Modifying Parent Approved Activity Schedule**

The parent's approved activity can change for multiple reasons. Examples include, but not limited to:

1. Parent's approved activity type changes (W2 to Employment)
2. Parent changes employment
3. Parent's work schedule changes (reduced or increased hours)
4. A parent leaves the case or a new eligible adult is added

Every time any of the above circumstances change, the *Parent Approved Activities* record and the authorization with child's need must be updated.

Below are steps that need to be taken to process the change.

### **Step 1: Modify Parent Activity Record**

To access the modify screen, click on the *Modify* icon on the *Case Summary* screen.

Case Summary			
Case Details			
<b>Case Number</b>	9150868594	<b>Primary Person</b>	Vilma Western
<b>Address</b>	Western La Crosse, WI 45454 La Crosse County	<b>Admin Agency</b>	La Crosse County (32)
		<b>Review Date</b>	05/31/2017
Search			
<b>Begin Date</b>	<input type="text" value="5/1/2016"/>	<b>End Date</b>	<input type="text"/>
<input type="button" value="Search"/>			
Parent Approved Activity Schedule			
<b>Parent's Name</b>	<b>Date of Birth</b>	<b>PIN</b>	<a href="#">Add Schedule</a>
Vilma Western	1/1/1987	9585053411	
<b>CWW Approved Activity</b>	<b>Schedule Period</b>	<b>Status</b>	
Employment	6/1/2016 - 5/31/2017	Completed	  

On the *Modify Activity Schedule* screen, on the *Effective End Date* field, enter the date the change happened. You will see a warning message that there are authorizations using this schedule. Click *Modify* to proceed.

NOTE: If the activity changed in the past, the system allows you to enter the end date; however, if any adjustments to current or past month's benefits are needed, use the PLBC module to calculate the difference.

After the previous Activity Schedule has been modified, click on *Add Schedule* link.

Parent Approved Activity Schedule			
Parent's Name	Date of Birth	PIN	
Vilma Western	1/1/1987	9585053411	<a href="#">Add Schedule</a>
CWW Approved Activity	Schedule Period	Status	
Employment	6/1/2016 - 8/31/2016	Completed	  

After the new *Effective Begin* and *End Dates* have been entered, you have the option to use the latest schedule (displays schedules that have been in effect during last three months).

New Activity Schedule - Select Period			
<b>Case Details</b>			
<b>Case Number</b>	9150868594	<b>Primary Person</b>	Vilma Western
<b>Address</b>	Western La Crosse, WI 45454 La Crosse County	<b>Admin Agency</b>	La Crosse County (32)
		<b>Review Date</b>	05/31/2017
<b>Individual Details</b>			
<b>Name</b>	Vilma Western	<b>PIN</b>	9585053411
<b>Date of Birth</b>	01/01/1987		
<b>Add Activity Schedule</b>			
<b>Effective Begin Date *</b>	09/01/2016		
<b>Effective End Date *</b>	05/31/2017		
<b>CWW Approved Activity</b>	Employment		
<b>Use Latest Schedule</b>	<input type="radio"/> Yes <input type="radio"/> No		
<b>Comments</b>			

If Yes is chosen above, the previous schedule displays. Review the parent’s schedule and make modifications if the activity times have changed.

Parent Schedule							
Schedule Type: <input checked="" type="radio"/> Single Week <input type="radio"/> Two Weeks <input type="radio"/> Four Weeks							
Sunday - Saturday							W/Weekends
	Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
6:00am							
6:30am							
7:00am		Work Name of the employer					
7:30am							
8:00am							
8:30am							
9:00am							
9:30am							
10:00am							
10:30am							
11:00am							
11:30am							
12:00pm							
12:30pm							
1:00pm							
1:30pm							
2:00pm							
2:30pm							
3:00pm							
3:30pm							
4:00pm							

Click the *Complete* button when done or *Add Comment* if a comment is needed.

## Step 2: Modify Authorizations

Next step is to modify the authorization(s) for each child in the case.

First step is to end the current authorization as of the effective date of the change (if the change is in the future). If the change occurred in the past, end the authorization as of the last day of the current month. Click on the *Effective Period* link to access the *Basic Details* screen.

List of Authorizations								
Child's Name	Date of Birth	Effective Period	Average Weekly Hours	Provider Location Details	Status	School Hours	Child Schedule	
Vilbert Western	01/01/2016	<a href="#">6/1/2016 - 5/31/2017</a>	55:00	8800039778-001 Good Golly Miss Molly's Cc-LFAM-Cla 5660 Goody Pt, Golly, WI 55891	Processed	<a href="#">School Hours</a>	<a href="#">Child Schedule</a>	   

On the *Basic Details* screen, modify the authorization end date.

Modify Authorization - Basic Details	
<b>Case Details</b>	
<b>Case Number</b>	9150868594
<b>Address</b>	Western La Crosse, WI 45454 La Crosse County
<b>Primary Person</b>	Vilma Western
<b>Admin Agency</b>	La Crosse County (32)
<b>RFA Date</b>	06/01/2016
<b>Review Date</b>	05/31/2017
<b>Individual Details</b>	
<b>Name</b>	Vilbert Western
<b>Date of Birth</b>	01/01/2016
<b>PIN</b>	9585053446
<b>Child Care Provider Location Details</b>	
<b>Provider/Location#</b>	8800039778/001
<b>Provider Name</b>	Miss Molly
<b>Location Name</b>	Good Golly Miss Molly's Cc-LFAM-Cla
<b>Phone #</b>	(654) 654-6546
<b>Address</b>	5660 Goody Pt Golly WI 65891
<b>Months Open</b>	Jan-Dec
<b>Night Capacity</b>	0
<b>Day Capacity</b>	8
<b>Hours: MON-FRI</b>	6:00AM - 6:00PM
<b>SAT-SUN</b>	Closed
<b>Authorization Period</b>	
<b>Status</b>	Processed
<b>Begin Date *</b>	06/01/2016
<b>End Date *</b>	<input type="text" value="09/30/2016"/>

After the previous authorization has been ended, click on the plus icon next to the authorization that was ended to start a new one.

List of Authorizations								
Child's Name	Date of Birth	Effective Period	Average Weekly Hours	Provider Location Details	Status	School Hours	Child Schedule	
Vilbert Western	01/01/2016	<a href="#">06/01/2016 - 09/30/2016</a>	55:00	8800039778-001 Good Golly Miss Molly's Cc-LFAM-Cla 5660 Goody Pt , Golly, WI	Processed	<a href="#">School Hours</a>	<a href="#">Child Schedule</a>	   

On the *New Authorization – Select Child Care Provider* screen, click on the *New Authorization* link if the child continues attending the same center. Click on *Search for New Child Care Provider Location* if the child is going to be enrolled in a new center.

New Authorization - Select Child Care Provider Location			
<b>Case Details</b>			
<b>Case Number</b>	9150868594	<b>Primary Person</b>	Vilma Western
<b>Address</b>	Western La Crosse, WI 45454 La Crosse County	<b>Admin Agency</b>	La Crosse County (32)
		<b>RFA Date</b>	06/01/2016
		<b>Review Date</b>	05/31/2017
<b>Individual Details</b>			
<b>Name</b>	Vilbert Western	<b>PIN</b>	9585053446
<b>Date of Birth</b>	01/01/2016		
<b>Currently Authorized Child Care Locations</b>			
** Indicates child has an authorization in this provider location.			<a href="#">Search for New Child Care Provider Location</a>
<b>Location Name</b>	<b>Address</b>		
* Good Golly Miss Molly's Cc-LFAM-Cla	5660 Goody Pt , Golly, WI	<a href="#">New Authorization</a>	

Then continue as explained in the *Creating an Authorization (Step 3)* section in the *EBT CSAW User Guide – Authorizations*.

### ***An Eligible Adult is added to the case***

When an adult is added to the child care case, the approved activity schedule must be added for the newly added parent/adult.

#### **Step 1:**

On the *Case Summary* screen, click on the *Add Schedule* next to the newly added adult.

Case Summary			
<b>Case Details</b>			
<b>Case Number</b>	1150865318	<b>Primary Person</b>	Nina Nitton
<b>Address</b>	Main Mkee, WI 45454 Milwaukee County	<b>Admin Agency</b>	Milwaukee County (40)
		<b>Review Date</b>	06/30/2017
<b>Search</b>			
<b>Begin Date</b>	<input type="text" value="4/1/2016"/>	<b>End Date</b>	<input type="text"/>
<input type="button" value="Search"/>			
<b>Parent Approved Activity Schedule</b>			
Parent's Name	Date of Birth	PIN	
▼ Nina Nitton	1/1/1985	1585046655	<a href="#">Add Schedule</a>
<b>CWW Approved Activity</b>			
Employment	7/1/2016 - 7/31/2016	Completed	
Employment	8/1/2016 - 6/30/2017	Completed	
▼ Nils-Dad Nitton	1/1/1987	1585048844	<a href="#">Add Schedule</a>
<b>CWW Approved Activity</b>			
No activity schedules exist for this individual on these dates.			

Then complete the steps listed under the *EBT CSAW User Guide – Authorizations*: <http://dcf.wisconsin.gov/publications/pdf/5117.pdd>. Step 1: Parent Approved Activities.

#### **Step 2:**

After the newly added adult’s schedule has been entered, end date the authorizations for all children in the case with the last day of the current month if the change happened in the past. If the second adult is added with effective date in the future, then end the authorizations as of the date the second adult is added.

**Step 3:**

Create new authorizations with a new begin date that coincides with the date the new parent/adult was added to the case.

**NOTE:** If the new adult was added with effective date in the past or current month, an adjustment might be necessary using the PLBC module.

***An Eligible Adult leaves the case***

If a parent/adult is no longer included in the child care case, complete the following steps:

**Step 1:**

Access the *Modify Activity Schedule – Select Period* screen and enter an end date.

Modify Activity Schedule - Select Period			
<b>Case Details</b>			
<b>Case Number</b>	9150863894	<b>Primary Person</b>	Julia July
<b>Address</b>	Summer Stra Summertown, WI 45454 Milwaukee County	<b>Admin Agency</b>	Milwaukee County (40)
		<b>Review Date</b>	06/30/2017
<b>Individual Details</b>			
<b>Name</b>	James July	<b>PIN</b>	9585044251
<b>Date of Birth</b>	01/01/1974		
<b>Modify Activity Schedule</b>			
<b>CWW Approved Activity</b>	Employment		
<b>Effective Begin Date *</b>	10/1/2016		
<b>Effective End Date *</b>	7/31/2016		
<b>Status</b>	Completed		
<b>Comments</b>	View Schedule Events		
	0 of 500 characters.		

**Step 2:**

End authorizations for all children in the case effective the date the adult is leaving the case (if future). If the adult left the case in the current or past month, end the authorization as of the last day of the current month.

**Step 3:**

Recreate the authorizations with a new begin date that coincides with the date the parent/adult will leave the case (if in the future). If the adult left the case in the current or past month, create the new authorization with the first day of the following month as the begin date. The new authorization will use the remaining parent's approved activity schedule when deriving hours.

**NOTE:** If the adult/parent left the case in the past or current month, an adjustment might be necessary using the PLBC module.

### Child attends a Second Provider

The process is the same for authorizations in *Processed* status as it is for authorizations in *Pending* or *Completed* status.

NOTE: Authorizations cannot exceed 75 hours per week per child on any case.

### Changing Providers

If the child’s authorization from Provider A needs to be changed to a new Provider B, complete the following steps.

#### Step 1:

First step is to end the current authorization as of the effective date of the change (if in the future). To access the *Modify Authorization – Basic Details* page, click on the date range of the authorization that needs to be ended.

Ville Western	01/01/2009	08/12/2016 - 05/31/2017	15:00	8800039818-001 Daisy Duck-Suspended 5/5-08/12/16 341 5Th Street St , Anytown, WI 54310	Processed	<a href="#">School Hours</a>	<a href="#">Child Schedule</a>			
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Enter the end date. If the authorization needs to be ended the current or past month, enter the last day of the month.

Modify Authorization - Basic Details			
<b>Case Details</b>			
<b>Case Number</b>	9150868594	<b>Primary Person</b>	Wilma Western
<b>Address</b>	Western La Crosse, WI 45454 La Crosse County	<b>Admin Agency</b>	La Crosse County (32)
		<b>RFA Date</b>	06/01/2016
		<b>Review Date</b>	05/31/2017
<b>Individual Details</b>			
<b>Name</b>	Ville Western	<b>PIN</b>	9585053438
<b>Date of Birth</b>	01/01/2009		
<b>Child Care Provider Location Details</b>			
<b>Provider/Location#</b>	8800039818/001	<b>Months Open</b>	Jan-Dec
<b>Provider Name</b>	Daisy Duck	<b>Group Size</b>	6
<b>Location Name</b>	Daisy Duck-Suspended 5/5-08/12/16	<b>Children under Age of Seven</b>	3
<b>Phone #</b>	(123) 865-7309	<b>Hours: MON-THUR</b>	6:00AM - 6:00PM
<b>Address</b>	341 5Th Street St Anytown WI 54310	<b>FRI</b>	4:00PM - 11:59PM
		<b>SAT</b>	12:00AM - 7:00AM
<b>Authorization Period</b>			
<b>Status</b>	Processed		
<b>Begin Date *</b>	08/12/2016		
<b>End Date *</b>	09/30/2016		

#### Step 2:

After the previous authorization has been ended, click on the plus icon next to the authorization that was ended to start a new one.

Ville Western	01/01/2009	08/12/2016 - 09/30/2016	15:00	8800039818-001 Daisy Duck-Suspended 5/5-08/12/16 341 5Th Street St , Anytown, WI 54310	Processed	<a href="#">School Hours</a>	<a href="#">Child Schedule</a>			
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On the *New Authorization – Select Child Care Provider* screen, click on the *Search for New Child Care Provider Location* link to conduct a search.

New Authorization - Select Child Care Provider Location			
<b>Case Details</b>			
<b>Case Number</b>	9150868594	<b>Primary Person</b>	Vilma Western
<b>Address</b>	Western La Crosse, WI 45454 La Crosse County	<b>Admin Agency</b>	La Crosse County (32)
		<b>RFA Date</b>	06/01/2016
		<b>Review Date</b>	05/31/2017
<b>Individual Details</b>			
<b>Name</b>	Ville Western	<b>PIN</b>	9585053438
<b>Date of Birth</b>	01/01/2009		
<b>Currently Authorized Child Care Locations</b>			
** Indicates child has an authorization in this provider location.			
			<a href="#">Search for New Child Care Provider Location</a>
<b>Location Name</b>	<b>Address</b>		
* Daisy Duck-Suspended 5/5-08/12/16	341 5Th Street St , Anytown, WI	<a href="#">New Authorization</a>	

Then continue as explained in the *Creating an Authorization (Step 3)* section in the *EBT CSAW User Guide – Authorizations*: <http://dcf.wisconsin.gov/publications/pdf/5117.pdf>.

NOTE: Changing providers in the current month is not allowed by policy, except in certain situations. Please review the *Draft Chapter 2 Policy Manual, 2.2.6 Authorizations in Situations of Hardship* for further details.

### Child's Copay Type or Special Needs Status Changes

Below are steps explaining the process when a child's copayment or special needs information changes:

#### Step 1:

If the child's copay type or special needs status changes, click on the *Modify* (pencil) icon next to the child on the *Case Summary* screen.

Child Copay/Special Need			
<b>Child's Name</b>	<b>Date of Birth</b>	<b>PIN</b>	
Color Yellow	01/01/2009	5585079085	<a href="#">Add Details</a>
<b>Effective Period</b>	<b>Copay Type</b>	<b>Special Needs</b>	
10/01/2016 -	LearnFare	No	  

On the *Modify* screen, enter an end date in the *Effective End Date* field. This date must be a last day of the month.

Modify Child Copay/Special Need			
<b>Case Details</b>			
<b>Case Number</b>	9150868594	<b>Primary Person</b>	Vilma Western
<b>Address</b>	Western La Crosse, WI 45454 La Crosse County	<b>Admin Agency</b>	La Crosse County (32)
		<b>Review Date</b>	05/31/2017
<b>Individual Details</b>			
<b>Name</b>	Vilbert Western	<b>PIN</b>	9585053446
<b>Date of Birth</b>	01/01/2016		
<b>Child Copay/Special Need</b>			
<b>Effective Begin Date *</b>	6/1/2016	<b>Effective End Date</b>	7/31/2016
<b>Copay Type *</b>	Regular		
<b>Special Needs *</b>	<input checked="" type="radio"/> No <input type="radio"/> Yes		

Click the *Save and Continue* button to save the data. You will see a warning message stating that there are authorizations using this record. Proceed with the modification.

**Step 2:**

Add new copay/special needs details record by clicking on the *Add Details* link next to the child. Complete the screen.

**Step 3:**

Access the *Case Benefit Quarterly Summary* screen. In the case below, the child’s copay type was change with effective 8/1/16 date. The change was made in August, so the August benefits were not affected because the funds are already on the card. The September benefits need to be recalculated.

Case Benefit Quarterly Summary				
Case Details				
<b>Case Number</b>	9150868594	<b>Primary Person</b>	Vilma Western	
<b>Address</b>	Western La Crosse, WI 45454 La Crosse County	<b>Admin Agency</b>	La Crosse County (32)	
		<b>Review Date</b>	05/31/2017	
<a href="#">&lt;&lt; Previous</a>		3rd Quarter 2016		<a href="#">Next &gt;&gt;</a>
<input type="text" value="July 2016"/>				
July 2016				
Child's Name	Provider Details	Provider Location Number	Authorized Hours	Benefit
Vilbert Western	Good Golly Miss Molly's Cc-LFAM-Cla 5660 Goody Pt, Golly, WI	8800039778-001	240	\$509.30
August 2016				
Child's Name	Provider Details	Provider Location Number	Authorized Hours	Benefit
Ville Western	Daisy Duck-Suspended 5/5-08/12/16 341 5Th Street St, Anytown, WI	8800039818-001	43	\$57.01
Vilbert Western	Good Golly Miss Molly's Cc-LFAM-Cla 5660 Goody Pt, Golly, WI	8800039778-001	240	\$509.30
September 2016 <span style="border: 1px solid red; padding: 2px;">Changes for this month require a new calculation.</span>				
Child's Name	Provider Details	Provider Location Number	Authorized Hours	Benefit
Ville Western	Daisy Duck-Suspended 5/5-08/12/16 341 5Th Street St, Anytown, WI	8800039818-001	76	\$99.11
Vilbert Western	Good Golly Miss Molly's Cc-LFAM-Cla 5660 Goody Pt, Golly, WI	8800039778-001	240	\$509.30

**Step 4:**

Click on the *Benefit Calculation* link in the left side navigation menu to access the *Calculate Benefits* screen.

**Calculate Benefits**

**Case Details**

Case Number: 9150868594  
 Address: Western, La Crosse, WI 54544, La Crosse County  
 Primary Person: Vilma Western  
 Admin Agency: La Crosse County (32)  
 Review Date: 05/31/2017

Benefits for the following months need to be calculated

Child's Name	Date of Birth	Provider Details	Provider Location Number	Authorized Period	Weekly Hours	School Closed Hours
<b>September 2016</b>						
Ville Western	01/01/2009	Daisy Duck-Suspended 5/5-08/12/16 341 5Th Street St, Anytown, WI	8800039818-001	8/12/2016 - 5/31/2017	15:00	10
Vilbert Western	01/01/2016	Good Golly Miss Molly's Cc-LFAM- Cla 5660 Goody Pt, Golly, WI	8800039778-001	6/1/2016 - 5/31/2017	55:00	0
<b>October 2016</b>						
Ville Western	01/01/2009	Daisy Duck-Suspended 5/5-08/12/16 341 5Th Street St, Anytown, WI	8800039818-001	8/12/2016 - 5/31/2017	15:00	0
Vilbert Western	01/01/2016	Good Golly Miss Molly's Cc-LFAM- Cla	8800039778-001	6/1/2016 - 5/31/2017	55:00	0

Calculate

Click on the *Calculate* button to proceed.

NOTE: If the copay type is changed with an effective date in the past or current month, an adjustment might be necessary using the PLBC module.

### ***A child is added to the Case***

If an eligible child is added to the case, take the following steps:

#### **Step 1:**

Complete the *Copay/Special Needs* details for the added child.

Oskar October      01/01/2011      7585079249      Add Details

Effective Period	Copay Type	Special Needs
There is no copayment or special needs information for the selected period		

#### **Step 2:**

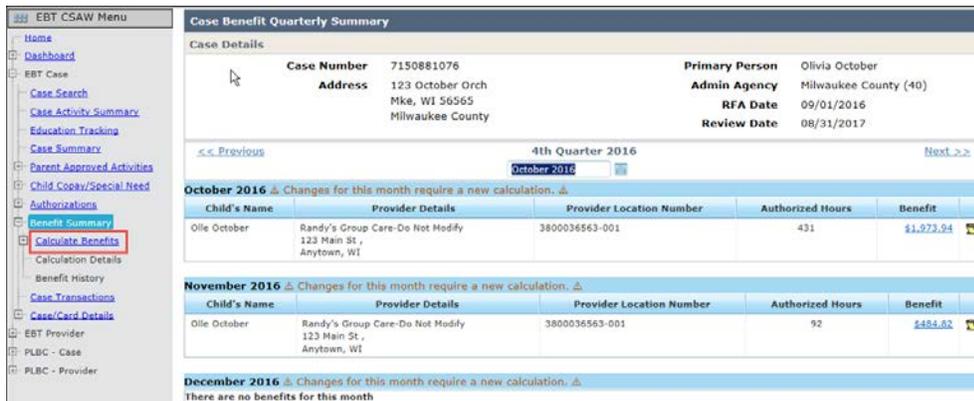
Create new authorizations for the child that was added to the case as explained in the *EBT Authorizations* user guide.

Child's Name	Date of Birth	PIN
Oskar October	01/01/2011	7585079249

Add Authorization

#### **Step 3:**

Calculate the benefits. The system will recalculate the benefits for all children in the case effective on the first day of the following month.



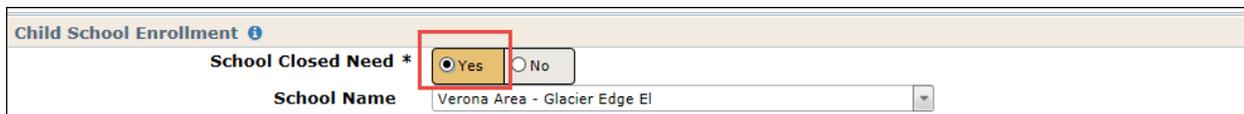
NOTE: If a child who does not need an authorization is added to a case, the system will automatically adjust the FLP level for the other children in the case effective on the first day of the following month.

### ***Adding/Modifying Scheduled School Closed Hours after a Regular Authorization is in Processed status***

If the scheduled school closed hours need to be added after the regular authorization has been completed, the hours can be added for future months.

#### **Step 1:**

If the *School Closed Need* indicator on the *Basic Details* screen is marked *No*, change it to *Yes*.



Note that this will automatically add inclement weather hours for the winter months if the authorization spans over November-March.

#### **Step 2:**

Add/modify scheduled school closed hours to future months as explained in the *EBT CSAW User Guide – Authorizations, Manage Scheduled School Closed Hours* section:

<http://dcf.wisconsin.gov/publications/pdf/5117.pdf>.

Scheduled School Closed Hours			
Add New Scheduled School Closed Hours			
Date *	Hours *	Comments	
01/16/2017	8	ml king day	  
11/25/2016	8		  
11/01/2016	8	parent/teacher conferences	  
12/05/2016	0	schoolmates have additional hours on this day	
11/24/2016	0	schoolmates have additional hours on this day	
10/31/2016	0	schoolmates have additional hours on this day	

### Step 3:

Calculate the benefits for future months by clicking on the *Calculate* button on the *Calculate Benefits* screen. EBT CSAW will add the hours to the future month and adjust the monthly amounts.

EBT CSAW Menu

- Home
- Dashboard
- EBT Case
  - Case Search
  - Case Activity Summary
  - Education Tracking
  - Case Summary
- Parent Approved Activities
- Child Copay/Special Need
- Authorizations
  - Benefit Summary
  - Calculate Benefits**
  - Calculation Details
  - Benefit History
  - Case Transactions
- Case/Card Details
- EBT Provider
  - PLBC - Case
  - PLBC - Provider

#### Case Benefit Quarterly Summary

**Case Details**

<b>Case Number</b>	7150881076	<b>Primary Person</b>	Olivia October
<b>Address</b>	123 October Orch Mke, WI 56565 Milwaukee County	<b>Admin Agency</b>	Milwaukee County (40)
		<b>RFA Date</b>	09/01/2016
		<b>Review Date</b>	08/31/2017

4th Quarter 2016

[<< Previous](#)
October 2016
[Next >>](#)

October 2016				
Child's Name	Provider Details	Provider Location Number	Authorized Hours	Benefit
Olle October	Randy's Group Care-Do Not Modify 123 Main St , Anytown, WI	3800036563-001	431	\$1,973.94
Oskar October	January Care- PROC 444 5TH St , Monthville, WI	5800039215-001	261	\$464.92

November 2016 <span style="color: red;">▲ Changes for this month require a new calculation. ▲</span>				
Child's Name	Provider Details	Provider Location Number	Authorized Hours	Benefit
Olle October	Randy's Group Care-Do Not Modify 123 Main St , Anytown, WI	3800036563-001	92	\$484.82
Oskar October	January Care- PROC 444 5TH St , Monthville, WI	5800039215-001	261	\$464.92

December 2016 <span style="color: red;">▲ Changes for this month require a new calculation. ▲</span>				
Child's Name	Provider Details	Provider Location Number	Authorized Hours	Benefit
Olle October	Randy's Group Care-Do Not Modify 123 Main St , Anytown, WI	3800036563-001	76	\$399.96
Oskar October	January Care- PROC 444 5TH St , Monthville, WI	5800039215-001	261	\$464.92

NOTE: If school closed hours are needed for current or past months, PLBC must be used to create an adjustment.

## Changes that do not require action in EBT CSAW

EBT CSAW will automatically calculate the following changes effective on the first day of the following month:

1. Income is changed in CWW
2. Change in child's age
3. Eligibility loss. For example one child in the case turns 13. The authorizations for the other children in the case are automatically recalculated.
4. Provider price change
5. Provider star rating change. For example a 2 Star provider is rated 3 Star.
6. Provider category change. If a certified provider becomes licensed, the agency needs to enter provider's prices into EBT CSAW. If the prices are entered timely, the system will recalculate all authorizations for the provider.

NOTE: In some of the change scenarios above, it might be necessary to calculate the subsidy amounts for current and/or past month using the PLBC module.