



**CSAW**  
**Post-Load Benefit Correction (PLBC)**  
**User Guide**

September 13, 2019

Division of Early Care and Education

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## Contents

Background Information.....	6
When to Use PLBC.....	6
When to Use Adhoc.....	7
Interoperability-System Processes.....	7
Security Privileges for PLBC and Adhoc.....	7
Common Features.....	8
Accessing PLBC and Adhoc.....	8
PLBC and Adhoc Attributes.....	10
Benefit Month Field.....	10
Error Source Field.....	10
Responsible Party Indicator Field.....	11
Reason and Secondary Reason Codes Fields.....	12
Comments Field.....	14
Historical Information.....	15
PLBC Request and Adhoc Adjustment History.....	15
History of Benefit Changes.....	16
PLBCs and Adhocs on Parent Notices.....	17
Viewing the Effects of a PLBC or Adhoc on the Case Benefits.....	18
PLBC Features.....	20
PLBC Request Statuses.....	20
PLBC Calculations and Calculation Details.....	20
PLBC “Apply To” Functionality.....	25
Resetting the Calculation.....	26
Modifying or Deleting a PLBC Request.....	27
Correcting a Processed PLBC Request.....	28
Creating a New Case PLBC Request.....	29
Step One: Select New Correction.....	29
Step Two: Enter Attributes.....	30
New Concept: A Change in FPL for One Month can Affect Subsidy for Following Months.....	31

Reason Codes: “Eligibility Error” versus “Prior Income/AG Error – Copayment” ..... 32

**Step Three: Enter Correction Details** ..... 33

Income/AG Size Corrections ..... 34

Eligibility/Copay/DOB Corrections ..... 37

Authorization Corrections ..... 40

**Step Four: Calculate and Review** ..... 47

**Calculate Benefit Adjustment** ..... 47

**Review Benefit Adjustment** ..... 48

**Step Five: Confirm** ..... 49

**Confirm the Adjustment** ..... 49

**PLBCs and Retro Authorizations on the Same Day** ..... 50

    Offset ..... 54

**Creating a New Provider PLBC Request** ..... 56

    Step One: Select New Correction ..... 56

**Step Two: Enter Attributes** ..... 57

**Step Three: Enter Correction Details** ..... 58

**Accreditation/Star Level Corrections** ..... 59

        Price Corrections ..... 59

**Authorization End** ..... 62

**Step Four: Calculate and Review** ..... 63

**Calculate Benefit Adjustment** ..... 63

**Review Benefit Adjustment** ..... 64

**Step Five: Confirm** ..... 66

Adhoc Adjustments ..... 66

**Creating a New Adhoc Adjustment** ..... 67

        Step One: Select Add Adjustment ..... 67

**Step Two: Enter Adjustment Information** ..... 68

    Modifying or Deleting an Adhoc Adjustment ..... 69

**Adhocs and Overpayments** ..... 69

**Glossary of Terms** ..... 71

Appendix A: CCDBG Phase 3 Changes to PLBC..... 73

    Background ..... 73

    Automation Changes – November 2018..... 73

## Background Information

The Post-Load Benefit Correction module, known as PLBC, is located in Child Care Statewide Administration (CSAW). PLBC is used in place of the previous system, known as PIES, for any corrections that need to be made to a case after the rollout of MyWICChildCare. PLBC allows local agency workers to calculate and correct child care subsidy fund amounts and determine over/underpayments after funds have been loaded to a parents' MyWICChildCare account.

Child care subsidy funds are loaded on the last business day of each month for the following month. Authorization and subsidy changes can be made up to the last business day of the month and still be reflected on the consecutive month's subsidy load. For example, if a parent needs to increase their child's authorization for next month, there is no need for a PLBC. Changes can be made to the next month's authorization up to the last business day of the current month.

Post load benefit corrections are needed when funds for either a prior or current month need to be adjusted. For example, if a parent needs to increase their child's authorization for this month after funds were loaded to the parent's EBT card, a post load benefit correction is possible, if applicable per policy.

Positive post load benefit corrections are loaded to the parents' account the following business day. Negative post load benefit corrections will not be deducted from the parent's MyWICChildCare account, except in situations where a retraction request has been submitted and processed for a case.

### **When to Use PLBC**

PLBC is used when there is a reported or discovered change in circumstances that would have caused the client to receive additional subsidy funds. This is called a positive adjustment. PLBC is also used when there is a reported or discovered change in circumstance that would have caused the client to receive a lower subsidy amount or to be ineligible for the Wisconsin Shares program. This is called a negative adjustment.

PLBC is only used for adjustments to the current or past month subsidy amounts that have been loaded to the MyWICChildCare account and in which the funds are in a processed status. If the change(s) effect future subsidy amounts, the authorization must be adjusted timely in CSAW. Below is a list of examples when PLBC may be used:

- A change in eligibility that impacts previous month(s) and /or the current month(s) subsidy
- A change in an authorization that impacts previous month(s) and/or current month(s) subsidy
- Agency errors
- Over/underpayment calculations related to program integrity (e.g., agency errors, client errors, provider errors, retractions, voluntary repayment agreements, or intentional program violations)

## **When to Use Adhoc**

The *Adhoc Case Adjustments* and *Adhoc Provider Adjustment* links can be used to make direct adjustments without calculating an adjustment through a PLBC request.

Adhoc functionality should only be used when PLBC is unable to accurately calculate a positive or negative adjustment. When using the Adhoc functionality, you will need to enter an adjustment amount that was calculated manually. See the [Adhoc Adjustments](#) section of this guide for more information about this functionality.

Some examples of situations that would require a Case Adhoc Adjustments are:

- When eligibility was not determined in CARES Worker Web (CWW) due to a system error, and the client should have been eligible. There is no original authorization, so PLBC is unable to process a correction for that particular month. Therefore, Adhoc would have to be used.
- An Administrative Law Judge (ALJ) decides that a client was wrongfully denied eligibility. There is no original authorization, so PLBC is unable to process a correction for that particular month.

An example of a situation that would require a Provider Adhoc Adjustment is that the provider agrees to return funds through a Voluntary Repayment Agreement, but is only returning a portion of the calculated negative adjustment.

## **Interoperability-System Processes**

PLBC does not interface with any other systems. If a change is reported that impacts eligibility, the case must be updated in CARES Worker Web (CWW) and any changes to a future authorization must be made in CSAW.

If a PLBC request creates a negative adjustment and it's determined to be an overpayment per policy, that overpayment amount must be entered into Benefit Recovery (BV). To create a claim in BV, you will need to create and complete a referral within the Benefit Recovery Investigative Tracking System (BRITS). This BRITS referral number must be entered in the BVRF screen in the Investigative Reason field.

Common reasons for a calculated negative adjustment that do not result in an entry in BV include:

- Retraction Requests
- Voluntary Repayment Agreement Requests
- Timely reported changes that result in a negative adjustment
- YoungStar negative adjustments

Case and provider PLBC requests that result in positive adjustments will be added to the client's MyWICChildCare EBT card automatically the following business day after confirming the PLBC request (this excludes YoungStar Rating increases for providers).

## **Security Privileges for PLBC and Adhoc**

The tables below describe the security privileges in PLBC for Case and Provider corrections. Workers must have Profile G (the Worker profile) to access PLBC. Profile G will allow privilege to the PIES system.

OCC stands for “Office of Child Care,” and includes staff in the Wisconsin Shares Policy Unit and the Bureau of Program Integrity.

Case									
Profile	Privilege Level	Adhoc	PLBC	Change “Apply To”	Card Return	Offset	Over Payment (OP)	Refer OP to BV	Transfer OP To Provider
Worker	View	X	X	-	X	-	X	-	-
	Update	-	X		-	-	-		
Coordinator	View	X	X	-	X	X	X	-	-
	Update	X	X		-	X	-		
OCC	View	X	X	X	X	X	X	X	X
	Update	X	X		X	X	X		

Provider										
Profile	Privilege Level	Adhoc	PLBC*	Correction to Star Level and Accreditation	Change “Apply To”	Offset	Over Payment (OP)	Mark OP ready for ACH	Refer OP to BV	Transfer OP To Client
Worker	View	X	X	X	-	-	X	-	-	-
	Update	-	X	-		-	-			
Coordinator	View	X	X	X	-	X	X	-	-	-
	Update	-	X	-		X	-			
OCC	View	X	X	X	X	X	X	X	X	X
	Update	X	X	X		X	X			

\* Provider adjustments except Star Level and Accreditation Corrections

## Common Features

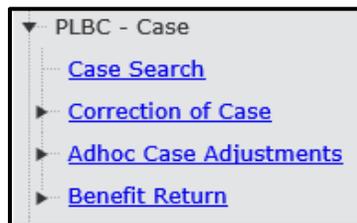
This section describes features that are used for more than one Post-Load Benefit Correction.

### Accessing PLBC and Adhoc

If you are already on a page for the case or provider you want to access corrections for, expand the *PLBC – Case* or *PLBC – Provider* section of the CSAW menu. The *Correction of Case/Provider*, *Adhoc Case/Provider Adjustments*, *Benefit Return (case only)*, and *Provider Overpayment Return (provider only)* links will be selectable and will take you to the correction page for that case or provider.

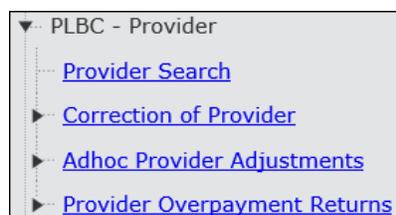
When the *PLBC – Case* section is expanded, it will display the *Case Search* link, a *Correction of Case* section, an *Adhoc Case Adjustments* section, and a *Benefit Return* section.

- Case Search: If you are not starting from a case page, such as Case Summary or Authorizations, you must use *Case Search* to find the case’s correction pages. Selecting the *Case Search* link brings you to a *Search for Case* page where you can search for and select a case. When you choose a case, you will be taken to that case’s *List of Corrections* page.
- Correction of Case: If you start from a case page, this will bring you to that case’s *List of Corrections* page. You can create case PLBC requests from this page and review previous case PLBC requests.
- Adhoc Case Adjustments: If you start from a case page this will bring you to the case’s *List of Adhoc Case Adjustments* page. You can enter positive or negative adhoc case adjustments from this page, or view past adhoc case adjustments.
- Benefit Return: If you start from a case page, this will bring you to the case’s *Benefit Returns* page. This page is used exclusively by BPI to complete Retraction requests submitted by local agencies.



If the *PLBC – Provider* section is expanded, it will display the *Provider Search* link, a *Correction of Provider* section, an *Adhoc Provider Adjustments* section, and a *Provider Overpayment Returns* section.

- Provider Search: Brings you to a *Search for Provider* page where you can search for and select a provider. When you choose a provider location, you will be taken to that provider’s *List of Corrections* page.
- Correction of Provider: If you start from a provider page, such as Provider Prices or Adjustments (YoungStar), this will bring you to that provider’s *List of Corrections* page. You can create provider PLBC requests from this page and review previous case PLBC requests.
- Adhoc Provider Adjustments: If you start from a provider page, this will bring you to the provider’s *List of Adhoc Provider Adjustments* page. You can enter positive or negative adhoc provider adjustments from this page, or view past adhoc case adjustments.
- Provider Overpayment Returns: If you start from a provider page, this will bring you to the provider’s *Provider Overpayment Returns* page.



## **PLBC and Adhoc Attributes**

Screen titles: *New Correction – Case Attributes, New Correction – Provider Attributes, Add New Adjustment – Case, Add New Adjustment – Provider*

After beginning a new PLBC request or Adhoc adjustment, you must enter “attributes.” This section describes the fields found on the attributes screens.

### **Benefit Month Field**

Select the calendar icon to enter the month and year of the request.

PLBC displays the timeframe of processed subsidy (benefit) months and years. PLBC requests cannot be initiated to months prior or after this displayed timeframe. **The first and last benefit month fields are not displayed on the Adhoc Add New Adjustment page.**

**Example:** In the screenshot below, a PLBC request cannot be completed for December 2017 or for October 2018 because benefits have not been processed or loaded to the EBT card for those time periods. PLBC requests can only be added for any months between January and September 2018.

### **Error Source Field**

Select the appropriate *Error Source* based on the descriptions below. **Identifying a party or parties as the error source does not necessarily mean that there was any kind of incompetence or fault. For example, if a parent requests more school closed hours due to a long snowstorm, the parent is not at fault, but the *Error Source* would be “Client Error.”**

- **Agency Error:** Choose this code if any eligibility or authorization information was entered incorrectly. This can also be used if a change was reported but not entered timely by the local agency.

- **Agency Worker Fraud – IPV:** Choose this code when an agency worker has purposely and deliberately violated the program rules as described in [Wis. Stat. s. 49.151\(2\)\(a\)](#).
- **Client Error:** Choose this code when the change being made is due to newly reported or discovered information and it is or was the responsibility of the client to inform the agency.
  - **Example:** Client requests an additional school closed day for the current month that can be authorized per policy.
- **Client Fraud – IPV:** Choose this code when a client has purposely and deliberately violated the program rules as described in [Wis. Stat. s. 49.151\(2\)\(a\)](#).
- **Collusion:** Choose this code when there was an agreement between two or more participants to deceive, mislead, or defraud others which results in their gain or benefit.
- **Provider Error:** Choose this code when the change being made is due to a provider violation or change in provider circumstances.
  - **Examples:** Overcapacity, YoungStar rating changes, provider closure, etc.
- **Provider Fraud – IPV:** Choose this code when a provider has purposely and deliberately violated the program rules as described in [Wis. Stat. s. 49.151\(2\)\(a\)](#).
- **System Error:** Choose this code when the error was the result of a system issue.

**NOTE:** Selections of *Agency Worker Fraud – IPV*, *Client Fraud – IPV*, *Provider Fraud – IPV*, or *Collusion* must be approved by BPI. For more information on what qualifies as an error, collusion, or IPV (Intentional Program Violation), please refer to [Chapter 4 of the Wisconsin Shares Child Care Subsidy Policy and Process Handbook](#).

New Correction - Case Attributes

Case Details

<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open

---

New Correction - Case Attributes

<b>Benefit Month *</b> <input type="text"/>	<b>First Benefit Month:</b> January, 2018
<b>Error Source *</b> <input style="border: 2px solid red;" type="text"/>	<b>Last Benefit Month:</b> September, 2018
<b>Responsible Party Indicator *</b> <input type="text"/>	
<b>Reason *</b> <input type="text"/>	
<b>Secondary Reason</b> <input type="text"/>	
<b>Comments</b>	

0 of 500 characters.

### Responsible Party Indicator **Field**

Select the appropriate *Responsible Party Indicator* based on the descriptions below.

- **Client:** Choose this code when there is a change in circumstances surrounding the client’s case or in the case of a client violation.
- **DCF:** Choose this code when the Department determines self-liability. This is in cases of agency error.
- **Provider:** Choose this code when there is a change regarding provider information or in the case of a provider violation.
- **Provider and Client:** Choose this code when clients and providers are liable for adjustments. This reason code must be used exclusively in cases of collusion.

New Correction - Case Attributes			
<b>Case Details</b>			
<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open
<b>New Correction - Case Attributes</b>			
<b>Benefit Month *</b>	<input type="text"/>	<b>First Benefit Month:</b>	January, 2018
<b>Error Source *</b>	<input type="text"/>	<b>Last Benefit Month:</b>	September, 2018
<b>Responsible Party Indicator *</b>	<input type="text"/>		
<b>Reason *</b>	<input type="text"/>		
<b>Secondary Reason</b>	<input type="text"/>		
<b>Comments</b>	<input type="text"/>		
	0 of 500 characters.		

### Reason and Secondary Reason Codes Fields

Different reason codes are available for different *Error Source* selections, so each of these choices will not be available for each error source. Select the appropriate reason code(s) based on the descriptions below.

- **Authorization Error:** Choose this code when authorization information needs to be updated (Begin and End dates, Schedule Type, School Closed Hours, or Rate Type).
- **Authorized to Wrong Provider:** Choose this code when an authorization was made to the incorrect provider or provider location.
- **Correction to PLBC Subsidy Adjustment:** Choose this code when a PLBC request has already been made for the month and is in processed status, and a second PLBC request needs to be made to correct the previous request, or alter a request due to a remand by an Administrative Law Judge (ALJ).
- **Eligibility Error:** Choose this code when eligibility information needs to be updated (child date of birth [DOB], copay type, income, AG [Assistance Group] size, or if the child should not have been eligible).

- For more information on choosing the correct reason code for an FPL (income or AG size) change, see the [Reason Codes: "Eligibility Error" versus "Prior Income/AG Error – Copayment"](#) section of this guide.
- **Out-Of-State Provider Accreditation Error:** Choose this code when a provider from out of state was inaccurately accredited.
- **Override Provider Price Type Error:** Choose this code when the incorrect provider price type was entered.
- **Prior Income/AG Error – Copayment:** Choose this code if there was no income and/or AG size error for the Benefit Month, but there was an income and/or AG size error for a prior month. See [Reason Codes: "Eligibility Error" versus "Prior Income/AG Error – Copayment"](#) section of this guide.
- **Provider Price Error:** Choose this code when an incorrect provider price was entered.
- **Violation - Provider Authorizing Payments Directly To Themselves:** Choose this code when a provider was inappropriately authorized to care for their child(ren) at their own center.
- **Violation Due To Overcapacity:** Choose this code when creating a PLBC request due to a provider overcapacity violation.
- **Youngstar Negative Adjustment Due To Rating Fraud:** Choose this code when a provider inaccurately reported information in order to fraudulently increase their Youngstar rating.
- **Youngstar Retroactive Positive Adjustment Rating Error:** Choose this this code when a Youngstar rating was lower than it should have been.

The primary reason is an important choice. This dictates information that will be used on the updated parent notices. See the [PLBCs and Adhocs on Parent Notices](#) section of this guide for more information.

The secondary reason is optional and, in most scenarios, will not be used. The secondary reason cannot be identical to the primary reason. An example of using a secondary reason would be a situation where corrections need to be made to a case's eligibility and authorization(s). For example, the client failed to report an eligible adult in the household, therefore corrections need to be made to the AG size, AG income, and authorized hours.

New Correction - Case Attributes			
<b>Case Details</b>			
<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open
<b>New Correction - Case Attributes</b>			
<b>Benefit Month *</b>	<input type="text"/>	<b>First Benefit Month:</b>	January, 2018
	<input type="text"/>	<b>Last Benefit Month:</b>	September, 2018
<b>Error Source *</b>	<input type="text"/>		
<b>Responsible Party Indicator *</b>	<input type="text"/>		
<b>Reason *</b>	<input type="text"/>		
<b>Secondary Reason</b>	<input type="text"/>		
<b>Comments</b>	<input type="text"/>		
	0 of 500 characters.		

### Comments Field

In this field, enter comments that document the justification for the PLBC request or Adhoc Adjustment.

**NOTE:** If the PLBC request or Adhoc Adjustment is a result of a BRITS investigation, please enter the BRITS referral number in the *Comments* for tracking purposes. For more information on BRITS, and where to locate the BRITS referral number, please see the BRITS User Guide located in the BRITS login Help button.

New Correction - Case Attributes			
<b>Case Details</b>			
<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open
<b>New Correction - Case Attributes</b>			
<b>Benefit Month *</b>	<input type="text"/>	<b>First Benefit Month:</b>	January, 2018
	<input type="text"/>	<b>Last Benefit Month:</b>	September, 2018
<b>Error Source *</b>	<input type="text"/>		
<b>Responsible Party Indicator *</b>	<input type="text"/>		
<b>Reason *</b>	<input type="text"/>		
<b>Secondary Reason</b>	<input type="text"/>		
<b>Comments</b>	<input type="text"/>		
	0 of 500 characters.		

## **Historical Information**

### **PLBC Request and Adhoc Adjustment History**

Screen Titles: *Correction History - Case Attributes; Income/AG Size - Correction History; Eligibility/Copay/DOB - Correction History; Authorization Correction History; Adhoc History For Case Adjustments; Star Level/Accreditation Correction History; Correction Prices; Authorization End Correction History; Adhoc History For Provider Adjustments; Updated Information*

PLBC and Adhoc store details of each correction made. The yellow scroll icon  indicates viewable history for that page; you may view the history of corrections any time by clicking on the icon.

<b>On This Page</b>	<b>Clicking  Brings You to</b>	<b>And You Can See These History Details</b>
List of Corrections - Case Attributes	Correction History - Case Attributes	Status; Error Source; Reasons; Comments; Updated Date*
Income/AG Size – Correction	Income/AG Size - Correction History	Determination Month; Income Amount; Eligible Members; Comments; Updated Date*
Eligibility/Copay/DOB - Correction	Eligibility/Copay/DOB - Correction History	Date of Birth; Copay Type; Eligible; Comments; Updated Date*
Authorization Correction	Authorization Correction History	Begin Date; End Date; Schedule Hours; New Average Weekly Hours; New Average Weekly Hours(Full Time); New Average Weekly (Above Full Time); Scheduled School Closed Hours; Rate Type; Override Rate Type; Override Rate; Comments; Updated Date*
List of Adhoc Case Adjustments	Adhoc History For Case Adjustments	Status; Category Type; Reasons; Benefit; Applied Benefit; Comments; Updated Date*
Star Level/Accreditation- Correction	Star Level/Accreditation Correction History	Star Level; Accreditation; Comments; Updated Date*
List of Correction Prices	Correction Prices	From Age; To Age; Price; Type; Comments; Updated Date*
Authorization End – Correction	Authorization End Correction History	Is Location invalid?; Valid until; Reasons; Comments; Updated Date*
List of Adhoc Provider Adjustments	Adhoc History For Provider Adjustments	Status; Category Type; Reasons; Benefit; Due Balance; Comments; Updated Date*

\* Clicking the *Updated Date* link on any history page brings you to the *Updated Information* page which displays the Updated Date, Worker ID for the worker who made the update, and Worker Name for the worker who made the update.

Updated Information	
Updated Date	11/20/2018 1:35:21 PM
Worker ID	1806
Worker Name	Rachel Holmaas

If the system made the update, "Worker ID" will be "0," and "Worker Name" will be "Data Not Found."

### History of Benefit Changes

Screen Titles: *Case Benefit Quarterly Summary; Benefit History*

A history of the effects of a PLBC or Adhoc request on the case's subsidy amount can be viewed in CSAW under *Benefit Summary*. To view a correction, select the *Benefit Summary* link on the Navigation Menu. Then select the appropriate month to review. Next, locate the authorization for the month of interest and select the yellow scroll icon.

**Case Benefit Quarterly Summary**

**Case Details**

<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open

<< Previous      1st Quarter 2018 (return to 2018 Q4)      Next >>

January 2018

Click the Excel icon above to download the data in Excel format.

Child's Name	Provider Details	Provider Location Number	Authorized Hours	Benefit	Recalculate
Leo [REDACTED]	Nordic Wonderland 123 Modified Address Rd, Northwoods, WI	9800039909-001	81	\$328.05	[Icon]

Child's Name	Provider Details	Provider Location Number	Authorized Hours	Benefit	Recalculate
Leo [REDACTED]	Nordic Wonderland 123 Modified Address Rd, Northwoods, WI	9800039909-001	93	\$376.65	[Icon]
Tara [REDACTED]	Nordic Wonderland 123 Modified Address Rd, Northwoods, WI	9800039909-001	93	\$376.65	[Icon]

Child's Name	Provider Details	Provider Location Number	Authorized Hours	Benefit	Recalculate
Leo [REDACTED]	Nordic Wonderland 123 Modified Address Rd, Northwoods, WI	9800039909-001	93	\$376.65	[Icon]
Tara [REDACTED]	Nordic Wonderland 123 Modified Address Rd, Northwoods, WI	9800039909-001	93	\$376.65	[Icon]

This will display the initial amount loaded for the month, as well as any adjustments that were made to the case's subsidy for the identified month.

Benefit History					
Case Details					
<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)		
<b>Primary Person</b>	Julle [REDACTED]	<b>RFA Date</b>	01/01/2018		
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018		
		<b>CC AG Status</b>	Open		
Individual Details					
<b>Name</b>	Leo [REDACTED]	<b>PIN</b>	1585283738		
<b>Date of Birth</b>	01/01/2015				
Child Care Provider Location Details					
<b>Provider/Location#</b>	9800039909/001	<b>Months Open</b>	Jan-Dec		
<b>Provider Name</b>	Nordic Wonderland	<b>Night Capacity</b>	0		
<b>Location Name</b>	Nordic Wonderland	<b>Day Capacity</b>	50		
<b>Phone #</b>	(555) 555-5555	<b>Hours: MON-FRI</b>	6:00AM - 6:00PM		
<b>Address</b>	123 Modified Addrss Rd Northwoods WI 45454	<b>SAT-SUN</b>	Closed		
Benefit History for a Month					
January 2018					
Calculation Updated on	Benefit	Change in Benefit	Benefit Loaded to Account	Status	Type
10/29/2018 11:24 AM	\$291.60	(\$36.45)	(\$36.45)	Pending	Post Load Benefit Correction
10/26/2018 10:26 PM	\$328.05	(\$48.60)	(\$48.60)	Processed	Post Load Benefit Correction
10/11/2018 09:55 PM	\$376.65	\$376.65	\$376.65	Processed	Initial Benefit

**PLBCs and Adhocs on Parent Notices**

PLBC will generate updated Parent Quarterly Subsidy Authorization Notices to parents for adjustments made to their subsidy for current or past months. PLBC requests and Adhoc adjustments need to be confirmed and then processed prior to parent notices being sent. The adjustment type (positive or negative) and the Apply To programming logic will dictate parent notice language. Providers will not be sent any information.

This information will appear towards the bottom of the notice and it explains the adjustments to the subsidy amount(s):

### Monthly Subsidy Amount Change Information

There has been a change in your child or children’s authorized subsidy amount for a previous month due a change you reported or that was discovered.

This will display for additional funds loaded to the EBT Card initiated by PLBC requests, Adhoc adjustments, or Retro Authorizations written in CSAW:

Added Subsidy Amount to MyWICChildCare Card				
Month	Child	Provider Name Provider/Location Num	Amount Added to Card	Reason

This will display for any negative adjustments:

<b>Overpayment</b>				
Overpayments will not be recouped from your MyWICChildCare card subsidy amounts. You will get a repayment agreement in the mail that will give you an overview of how to pay the amount back.				
Month	Child	Provider Name Provider/Location Num	Overpayment Amount	Reason

**Viewing the Effects of a PLBC or Adhoc on the Case Benefits**

Screen Titles: *Case Benefit Quarterly Summary; Calculation Details*

Confirmed PLBC requests, offset amounts and adhoc adjustments will process overnight and can be seen in the *Case Benefit Quarterly Summary* screens found by clicking the *Benefit Summary* link in the CSAW navigation menu.

Adhoc adjustments do not become part of the monthly benefit calculation since they are direct adjustments to the subsidy amount. Adhoc adjustments display on the *Case Benefit Quarterly Summary* page as a separate row. The Authorized Hours column for an Adhoc adjustment will be "N/A (Ad Hoc)."

Child's Name	Provider Details	Provider Location Number	Authorized Hours	Benefit	
[Redacted]	Nordic Wonderland 123 Modified Addrss Rd, Northwoods, WI	9800039909-001	161	\$603.45	[Icon]
[Redacted]	Nordic Wonderland 123 Modified Addrss Rd, Northwoods, WI	9800039909-001	N/A (Ad Hoc)	\$20.00	[Icon]

PLBC requests become part of the monthly benefit calculation. In order to see the effects of a PLBC request, click the *Benefit* amount link to open the *Calculation Details* page.

January 2018					
					<a href="#">Recalculate</a>
Child's Name	Provider Details	Provider Location Number	Authorized Hours	Benefit	
Leo [REDACTED]	Nordic Wonderland 123 Modified Addrss Rd, Northwoods, WI	9800039909-001	81	\$328.05	
February 2018					
					<a href="#">Recalculate</a>
Child's Name	Provider Details	Provider Location Number	Authorized Hours	Benefit	
Leo [REDACTED]	Nordic Wonderland 123 Modified Addrss Rd, Northwoods, WI	9800039909-001	93	\$376.65	
Tara [REDACTED]	Nordic Wonderland 123 Modified Addrss Rd, Northwoods, WI	9800039909-001	93	\$376.65	
March 2018					
					<a href="#">Recalculate</a>
Child's Name	Provider Details	Provider Location Number	Authorized Hours	Benefit	
Leo [REDACTED]	Nordic Wonderland 123 Modified Addrss Rd, Northwoods, WI	9800039909-001	66	\$267.30	
Tara [REDACTED]	Nordic Wonderland 123 Modified Addrss Rd, Northwoods, WI	9800039909-001	109	\$441.45	

Then double-click the Net Subsidy Change green field to expand. This will display any post-load adjustments including PLBC requests and offset amounts. PLBC requests and offset amounts are reflected in the "Subsidy Change" row.

Case Subsidy Calculation Details		
Child's Name	Leo [REDACTED]	Tara [REDACTED]
Date of Birth	01/01/15	01/01/15
Provider-Location	9800039909-001	9800039909-001
Status	Processed	Processed
Authorized Hours	66	109
Regular Subsidy Hours	66	109
Provider Price Type	Full-time	Full-time
Hourly Rate Used	\$4.20	\$4.20
Capped Subsidy	\$277.20	\$457.80
Hourly Copay	(\$9.90)	(\$16.35)
Net Full Time Amount	\$267.30	\$441.45
Above Full Time Subsidy	\$0.00	\$0.00
Subtotal	\$267.30	\$441.45
Provider Amount	\$66.83	\$110.37
YoungStar Adjustment	\$0.00	\$0.00
Total Subsidy Amount	\$267.30	\$441.45
Previous Applied Amount	\$376.65	\$376.65
Subsidy Change	(\$109.35)	\$64.80
OffSet Amount	\$64.80	(\$64.80)
Subsidy Applied Mode	Apply to family	Apply to family
Net Subsidy Change	(\$44.55)	\$0.00

Confirmed PLBC requests, offset amounts and adhoc adjustment amounts can also be viewed in the [Parent Portal My Account](#) page.

WISCONSIN DEPARTMENT OF CHILDREN AND FAMILIES ChildCare

Welcome, [Redacted] Logo

Case Number - 7150855270

### My Account

Primary Person: Sandy [Redacted]  
 Card Number: XXXX-XXXX-XXXX-1685  
 Card Status: Inactive

Child	Provider	FIS Provider ID	Balance
Sammy [Redacted] (child #1)	Anna's Kid Care, 4-Star, Dually Reg (regulation & quality) ★★★★★	D205263	\$200.00
Sammy [Redacted] (child #1)	Randy's Group Care-Do Not Modify (regulation & quality) ★★★★★	D205258	\$6,142.94

Total Child Care Balance on Card \$6,342.94

## PLBC Features

This section describes features that are shared between Case PLBC requests and Provider PLBC requests.

### PLBC Request Statuses

A PLBC request is assigned a status by the system.

- Pending: Assigned when the Case/Provider Attributes page is completed, but no further action has been taken
- In-Progress: Assigned when the Case/Provider Attributes and Correction Detail pages are added
- Calculated: Assigned when you Calculate the PLBC request
- Confirmed: Assigned when you confirm the PLBC request calculation. If a PLBC is in Confirmed status, it will automatically change to Processed status overnight.
- Processed: Assigned when the system has applied the PLBC benefit adjustments according to the Apply To value

A PLBC request's status determines whether or not it can be changed or deleted. For more information, see the [Modifying or Deleting a PLBC Request](#) section of this guide.

If a PLBC request is in Calculated status (has not been changed to Confirmed), the system will reset the calculation and change the PLBC's status to In Progress overnight.

### PLBC Calculations and Calculation Details

Screen Title: *Calculation Correction and Confirm Benefit Changes by Case; Calculation Correction and Confirm Benefit Changes by Provider; Calculation Details*

Once attributes and correction details are entered for a PLBC request, you can calculate the PLBC request. Calculating the PLBC request brings you to the *Calculation Correction and Confirm Benefit Changes by Case/Provider* page.

To view **PLBC adjustment calculation details**, select the “Calculated Change” amount link for the applicable child. **Here is an example for a Case PLBC request. Provider PLBC requests will generally have more rows on this page, since all affected children are displayed.**

Calculation Correction And Confirm Benefit Changes By Case							
<b>Case Details</b>							
<b>Case Number</b>	1150988312			<b>Admin Agency</b>	Dane County (13)		
<b>Primary Person</b>	Julie [REDACTED]			<b>RFA Date</b>	01/01/2018		
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County			<b>Review Date</b>	12/31/2018		
				<b>CC AG Status</b>	Open		
<b>Correction Request Details</b>							
<b>Benefit Month</b>	January 2018			<b>Correction Type</b>	Client Error		
<b>Reasons</b>	Eligibility Error,Authorization Error			<b>Correction Status</b>	Calculated		
<b>Requested Date</b>	10/18/2018						
 Click the Excel icon above to download the data in Excel format.							
<b>Benefit Change Details</b>							
Child's Name	Date of Birth	Provider Details	Previous Benefit	Current Benefit	Calculated Change	Remaining Balance	
Leo [REDACTED]	<del>06/05/2010</del>	<del>000000000-001</del> Nordic Wonderland 123 Modified Addrss, Northwoods , WI 45454	<del>1075.00</del>	<del>1100.00</del>	(\$186.93)	\$376.65	Apply To Family ▾

The screenshot below shows the calculation **details for the PLBC benefit adjustment**. Two columns appear when selecting the *Calculated Change*. The “Previous” column displays the variables that were used for the initial calculation and the “New” column displays the variables that were used for the new calculation. The system highlights changes in red, as shown in the screenshot below.

**Note:** For help in understanding CSAW subsidy calculations, see the [Benefit Calculations User Guide](#).

**Calculation Details**

Case Details

Admin Agency: Dane County (13)

**The System highlights, in red, all of the subsidy calculation variables that were affected by the corrections done to the case.**

**The corrections made to the Income and Assistance Group for the month of January put the family in a higher FPL bracket, which therefore raised the Family Copay and the Total Copay**

Benefit Comparison

	Previous	New
Month	January 2018	January 2018
Capped FPL	65	85
Family Copay	\$13.95	\$24.48
Child's Name	Leo [REDACTED]	Leo [REDACTED]
Date of Birth	01/01/15	01/31/15
Provider-Location	9800039909-001	9800039909-001
Status	Processed	Pending
Authorized Hours	93	51
Regular Subsidy Hours	93	51
Provider Price Type	Full-time	Full-time
Hourly Rate Used	\$4.20	\$4.20
Capped Subsidy	\$390.60	\$214.20
Total Copay	(\$13.95)	(\$24.48)
Subtotal	\$376.65	\$189.72
Above Full Time Subsidy	\$0.00	\$0.00
Subtotal	\$376.65	\$189.72
YoungStar Adjustment	\$0.00	\$0.00
Subsidy Amount	\$376.65	\$189.72
Calculated Change		(\$186.93)

**The corrections made to Eligibility, Copay, and DOB for January can be seen, but had no effect on the calculation because the child remained in the same Maximum Reimbursement Bracket.**

**Changes to the year of the DOB would most likely have a more substantial effect**

**The corrections made to the Authorization (total number of authorized days reduced) for the month of January lowered the monthly authorized hours to 51.**

**The system calculates this number by taking the average weekly hours, multiplying them by 4.348125, and rounding the result to the nearest whole number.**

< Back

Green row titles are section headers. Clicking these green rows will expand that section and display all rows in that section.

Select the *Expand all* link to expand all section headers and display all calculation rows (see screenshots below).

Calculation Details		
<b>Case Details</b>		
<b>Case Number</b>	1150988312	
<b>Primary Person</b>	Julie [REDACTED]	
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	
<a href="#">Collapse all</a>	<a href="#">Expand all</a>	
<b>Benefit Comparison</b>		
	<b>Previous</b>	<b>New</b>
<b>Month</b>	January 2018	January 2018
<b>Capped FPL</b>	65	85
<b>Family Copay</b>	\$13.95	\$24.48
<b>Child's Name</b>	Leo [REDACTED]	Leo [REDACTED]
<b>Date of Birth</b>	01/01/15	01/31/15
<b>Provider-Location</b>	9800039909-001	9800039909-001
<b>Status</b>	Processed	Pending
<b>Authorized Hours</b>	93	51
<b>Regular Subsidy Hours</b>	93	51
<b>Provider Price Type</b>	Full-time	Full-time
<b>Hourly Rate Used</b>	\$4.20	\$4.20
<b>Capped Subsidy</b>	\$390.60	\$214.20
<b>Total Copay</b>	(\$13.95)	(\$24.48)
<b>Subtotal</b>	\$376.65	\$189.72
<b>Above Full Time Subsidy</b>	\$0.00	\$0.00
<b>Subtotal</b>	\$376.65	\$189.72
<b>YoungStar Adjustment</b>	\$0.00	\$0.00
<b>Subsidy Amount</b>	\$376.65	\$189.72
<b>Calculated Change</b>		<a href="#">(\$186.93)</a>
<a href="#">Collapse all</a>	<a href="#">Expand all</a>	

To view how the corrections made to Provider Price and Capped Subsidy affected previous and new benefit calculations, click on the green “Capped Subsidy” row to expand the section, which includes rows for “Initial Amount,” “Provider Price” and “Agency Ceiling.”

Benefit Comparison		
	Previous	New
Month	January 2018	January 2018
↗ Capped FPL	65	85
↗ Family Copay	\$13.95	\$24.48
Child's Name	Leo [REDACTED]	Leo [REDACTED]
Date of Birth	01/01/15	01/31/15
Provider-Location	9800039909-001	9800039909-001
↗ Status	Processed	Pending
Authorized Hours	93	51
↗ Regular Subsidy Hours	93	51
Provider Price Type	Full-time	Full-time
↗ Hourly Rate Used	\$4.20	\$4.20
Initial Amount	\$390.60	\$214.20
Provider Price	\$1,087.04	\$1,087.04
Agency Ceiling	\$639.18	\$639.18
↗ Capped Subsidy	\$390.60	\$214.20
↗ Total Copay	(\$13.95)	(\$24.48)
Subtotal	\$376.65	\$189.72
↗ Above Full Time Subsidy	\$0.00	\$0.00
Subtotal	\$376.65	\$189.72
↗ YoungStar Adjustment	\$0.00	\$0.00
Subsidy Amount	\$376.65	\$189.72
↗ Calculated Change		(\$186.93)

Reducing the number of authorized days did not change the Provider Price Type, however it did lower the Initial Amount

The previous Subsidy Amount was \$376.65.

All the corrections made for the child PLBC adjustment reduced the subsidy amount to \$189.72, resulting in an overpayment of \$186.93.

The parenthesis shows that the Calculated Change is a negative amount.

To view how the corrections affected the copay calculations, click on the green "Total Copay" row to expand the section which includes rows for "Copay Type," and "Share of Family Copay."

Benefit Comparison		
	Previous	New
<b>Month</b>	January 2018	January 2018
<b>Capped FPL</b>	65	85
<b>Family Copay</b>	\$13.95	\$24.48
<b>Child's Name</b>	Leo [REDACTED]	Leo [REDACTED]
<b>Date of Birth</b>	01/01/15	01/31/15
<b>Provider-Location</b>	9800039909-001	9800039909-001
<b>Status</b>	Processed	Pending
<b>Authorized Hours</b>	93	51
<b>Regular Subsidy Hours</b>	93	51
<b>Provider Price Type</b>	Full-time	Full-time
<b>Hourly Rate Used</b>	\$4.20	\$4.20
<b>Capped Subsidy</b>	\$390.60	\$214.20
<b>Copay Type</b>	Regular	Regular
<b>Share of Family Copay</b>	(\$13.95) (100%)	(\$24.48) (100%)
<b>Total Copay</b>	(\$13.95)	(\$24.48)
<b>Subtotal</b>	\$376.65	\$189.72
<b>Above Full Time Subsidy</b>	\$0.00	\$0.00
<b>Subtotal</b>	\$376.65	\$189.72
<b>YoungStar Adjustment</b>	\$0.00	\$0.00
<b>Subsidy Amount</b>	\$376.65	\$189.72
<b>Calculated Change</b>		(\$186.93)

Increasing the Capped FPL to 85 resulted in an increase to Leo's Share of Family Copay and Total Copay.

### ***PLBC "Apply To" Functionality***

The "Apply To" value defaults according to the Reason Code and whether the adjustment is positive or negative. It cannot be changed by workers or agency coordinators. If you find that the PLBC request is applying an adjustment incorrectly, reevaluate the Reason Code that was used. If the Reason Code is appropriate, but the adjustment is being applied incorrectly, see **Note** below.

**Note:** It is the worker's responsibility to ensure that the "Apply To" field is correctly applying adjustments per policy before confirming the PLBC request. If the "Apply To" field is incorrect, the worker must send the issue to:

- The Wisconsin Shares Child Care Subsidy and Technical Assistance Line, for positive adjustments
- The Bureau of Program Integrity TA Mailbox, for negative adjustments

The Apply To value determines which party to apply the adjustment to. Positive adjustments should always be coded Apply To Family or Do Not Apply. If the positive adjustment is coded Apply To Family,

the funds will be loaded to the client's EBT Card overnight. If it is coded as Do Not Apply, the funds calculated for the positive adjustment will not be distributed to anyone.

Negative adjustments that are created while assessing for an overpayment can be coded as Apply To Family, Apply To Provider, or Do Not Apply. If the negative adjustment is being calculated as part of a client overpayment, then the adjustment should be coded Apply to Family. If the negative adjustment is being calculated as a part of a provider overpayment, then the adjustment should be coded as Apply To Provider. If the negative adjustment that was created will not result in an overpayment being issued to any party, the adjustment should be coded as Do Not Apply.

In addition to the standard Apply To modes, there are also additional system generated Apply To vaules that will populate if the adjustment meets specific criteria:

- Not Applied Due to Cut Off: The subsidy adjustment is greater than -\$1 and less than \$1
- Not Applied Due to Positive Amount: The PLBC calculated a positive adjustment that the system determined should not be applied due to policy requirements or the specific reason code and error source that were listed.
- Not Applied Due to Negative Amount: The PLBC calculated a negative adjustment that the system determined should not be applied due to policy requirements or the specific reason code and error source that were listed.

### **Resetting the Calculation**

Screen Title: *Reset Calculate Correction – Case Attributes; Reset Calculate Correction – Provider Attributes*

To modify or delete a PLBC request in Calculated or Confirmed status, you must first reset the calculation. Reset the calculation by selecting the magnifying glass icon next to the request. Then, on the left side Navigation Menu, select the *Reset Calculation* link. You will then be prompted to confirm that you want to reset the calculation.

**Reset Calculate Correction - Case Attributes**

**Case Details**

<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	N/A
		<b>CC AG Status</b>	Closed

**Reset Calculate Correction - Case Attributes**

<b>Benefit Month</b>	February 2018
<b>Status</b>	Calculated
<b>Error Source</b>	Agency Error
<b>Responsible Party Indicator</b>	DCF
<b>Reason</b>	Authorization Error
<b>Secondary Reason</b>	
<b>Comments</b>	Incorrect number of hours authorized, correcting per request.

**Reset Calculation**

⚠ Resetting this correction will reset all future month Calculated/Confirmed corrections within eligibility period.

## **Modifying or Deleting a PLBC Request**

Screen Titles: *Modify Correction – Case Attributes; Delete Correction – Case Attributes; Modify Correction – Provider Attributes; Delete Correction – Provider Attributes*

Any PLBC requests that are listed as Pending or In Progress on the *List of Correction – Case/Provider Attributes* page may be modified. For more information, see the [PLBC Request Statuses](#) section of this guide.

If the request is in Calculated or Confirmed status, you can return the request to In Progress status by resetting the calculation. For instruction on resetting the calculation, see the [Resetting the Calculation](#) section of this guide (above).

To modify a previously made PLBC request, select the pencil icon. You can then modify the entries on the Case/Provider Attributes and correction details pages.

**List of Corrections - Case Attributes**

**Case Details**

<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open

**List of Corrections - Case Attributes**

Benefit Month	Error Source	Reasons	Requested Date	Status	Corrections	
February 2018	Client Error	Eligibility Error	10/22/2018	In Progress	<a href="#">Authorization</a>	
January 2018	Client Error	Eligibility Error, Authorization Error	10/18/2018	Calculated	<a href="#">Authorization</a> <a href="#">Income/AG Size</a> <a href="#">Eligibility/Copay/DOB</a>	<a href="#">Benefit Changes</a> 

To delete a PLBC request, select the trash can icon. This will take you to the *Delete Correction – Case/Provider Attributes* page. Select the checkbox next to “Confirm Delete” and click the Delete button.

**EBT CSAW Menu**

- Home
- Dashboard
- Assignments Search
- Inbox Search
- EBT Case
- EBT Provider
- PLBC - Case
  - Case Search
  - Correction of Case**
  - Request - Add
  - Request - Modify
  - Request - History
  - Request - Delete

**List of Corrections - Case Attributes**

**Case Details**

<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open

**List of Corrections - Case Attributes**

Benefit Month	Error Source	Reasons	Requested Date	Status	Corrections	
January 2018	Client Error	Eligibility Error, Authorization Error	10/18/2018	In Progress	<a href="#">Authorization</a> <a href="#">Income/AG Size</a> <a href="#">Eligibility/Copay/DOB</a>	

**EBT CSAW Menu**

- Home
- Dashboard
- Assignments Search
- Inbox Search
- EBT Case
- EBT Provider
- PLBC - Case
  - Case Search
  - Correction of Case
    - Request - Add
    - Request - Modify
    - Request - History
    - Request - Delete**
    - Calculate
    - Reset calculation
    - Benefit Changes
    - Offset Changes
    - Benefit Comparison
  - Adhoc Case Adjustments
  - Benefit Return
  - PLBC - Provider
  - Case Overpayments

**Delete Correction - Case Attributes**

**Case Details**

<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open

**Delete Correction - Case Attributes**

<b>Benefit Month</b>	January 2018
<b>Status</b>	In Progress
<b>Error Source</b>	Client Error
<b>Responsible Party Indicator</b>	Client
<b>Reason</b>	Eligibility Error
<b>Secondary Reason</b>	Authorization Error
<b>Comments</b>	Client untimely reported that the father was in he household. A correction for Income/AG/DOB and Authorizations needs to be made

**Confirm Delete? \***

**Delete >**

### ***Correcting a Processed PLBC Request***

If an agency confirmed an incorrect PLBC request and it processed overnight, they need to correct it by doing another PLBC request for the same month. For the new PLBC request, choose “Correction to Plbc Subsidy Adjustment” for the Reason code. The Secondary Reason code must be the same as the Reason code for the PLBC request which is being corrected.

For example, an Authorization Error - Case Correction was processed for January 2018 and it was incorrect.

List of Corrections - Case Attributes							
Case Details							
<b>Case Number</b>	1150988312			<b>Admin Agency</b>	Dane County (13)		
<b>Primary Person</b>	Julie [REDACTED]			<b>RFA Date</b>	01/01/2018		
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County			<b>Review Date</b>	12/31/2018		
				<b>CC AG Status</b>	Open		
List of Corrections - Case Attributes							
Benefit Month	Error Source	Reasons	Requested Date	Status	Corrections		
February 2018	Agency Error	Authorization Error	10/26/2018	In Progress	<a href="#">Authorization</a>		  
January 2018	Client Error	Authorization Error	10/26/2018	Processed	<a href="#">Authorization</a>	<a href="#">Benefit Changes</a>	 

Another PLBC request needs to be entered and completed for January 2018. Workers must use “Correction to Plbc Subsidy Adjustment” for the Reason code and the initial reason for the correction for the Secondary Reason code, as shown below:

**New Correction - Case Attributes**

**Benefit Month \***  

**First Benefit Month:** January, 2018

**Last Benefit Month:** September, 2018

**Error Source \***

**Responsible Party Indicator \***

**Reason \***

**Secondary Reason**

**Comments**  
 The correction to the authorization was previously done incorrectly. Another PLBC needs to be entered to correct the total average weekly hours.  
 144 of 500 characters.



## Creating a New Case PLBC Request

The basic steps to creating a new case-level PLBC Request are:

- Step One: Select “New Correction”
- Step Two: Enter information into the Case Attributes page
- Step Three: Enter Correction Details
- Step Four: Calculate and Review
- Step Five: Confirm (if Correct)

### Step One: Select New Correction

Screen Title: *List of Corrections - Case Attributes*

This page is reached by clicking *Correction of Case* in the left-hand navigation menu. For information about finding the *Correction of Case* link, which will bring you to the *List of Corrections* page, see the [Accessing PLBC and Adhoc](#) section of this guide.

The *List of Corrections – Case Attributes* page displays any initiated PLBC requests. This includes information on the Benefit Month, Error Source, Reasons, Requested Date, Status, Correction, and Benefits Changes.

PLBC only allows one PLBC request per month in Pending, In Progress, Calculated, or Confirmed Status. If you need to make an additional correction to the month and the existing correction is in Pending or In Progress status, you can add the additional correction details. If it is in Calculated or Confirmed Status, you can reset the calculation and add the additional correction details. Once the correction is listed as processed, a new one can be entered for the same month.

Select the *New Correction* link to initiate a new request.

**List of Corrections - Case Attributes**

**Case Details**

<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open

**List of Corrections - Case Attributes**

Benefit Month	Error Source	Reasons	Requested Date	Status	Corrections	
February 2018	Client Error	Authorization Error	10/17/2018	Confirmed	<a href="#">Authorization</a>	<a href="#">Benefit Changes</a>
January 2018	Client Error	Authorization Error	10/17/2018	Confirmed	<a href="#">Income/AG Size</a>	<a href="#">Benefit Changes</a>
					<a href="#">Authorization</a>	<a href="#">Benefit Changes</a>

[New Correction](#)

### ***Step Two: Enter Attributes***

Screen Title: *New Correction - Case Attributes*

Selecting “New Correction” on the *List of Corrections – Case Attributes* page will bring you to the *New Correction – Case Attributes* page. For information about the fields on this page, see the [PLBC and Adhoc Attributes](#) section of this guide.

When all attributes are entered, click the “Submit” button. This will return you to the *List of Corrections – Case Attributes* page.

**New Concept: A Change in FPL for One Month can Affect Subsidy for Following Months**

On November 1, 2018, Wisconsin Shares implemented the concept of Copayment Periods (see the [Wisconsin Shares Child Care Policy and Process Handbook](#) Section 2.5.3 and all subsections). The Copayment Period defines the family’s “Capped FPL,” which is the Federal Poverty Level (FPL) that CSAW uses to determine the correct Copayment per Hour in the Stabilization and Gradual Phase Out periods. A family’s FPL is based on both their income and their assistance group (AG) size.

The family’s Copayment Period is determined according to their FPL at Initial Application for new cases, or at Renewal for ongoing cases. The Copayment Period cannot increase until the family’s next renewal. For example, if a family is placed into Gradual Phase Out at their renewal, they cannot move into the Exit period during that eligibility period, even if their income increases to above 200% FPL. However, if a family’s FPL decreases, their Copayment Period can decrease at any time.

Copay Period	Capped FPL?	Effect on Future Months
Stabilization (0-189% FPL)	Yes. Capped FPL is set as the lowest FPL in the family’s eligibility period so far.	A decrease in income can set a new, lower Capped FPL for following months
Gradual Phase Out (190-199% FPL)	Maybe. If the current month’s FPL is above 200% FPL, the Capped FPL for the current month will be 200% FPL.	A decrease to below 190% FPL will move the family to the Stabilization period
Exit (200% FPL and above)	No	A decrease to below 200% will move the family to the Gradual Phase Out period  A decrease to below 190% FPL will move the family to the Stabilization period

We already know that correcting an error in a family’s FPL can change the subsidy amount for the month of the error. But now, because of the Copayment Periods and how they determine the Capped FPL for the Copayment per Hour, an error in a family’s FPL can change the subsidy calculation for following months by either:

1. Moving them to a lower Copayment Period, or
2. If they were already in Copayment Stabilization, setting a lower Capped FPL.

If the months following the error have processed subsidy, they need to be recalculated too, even if there is no error for those following months. If everything had worked correctly, that temporary change in the FPL might have moved the family to a lower Copayment Period or, if they were already in Stabilization period, it could have set a new Capped FPL.

A new Reason Code, “Prior Income/AG Error – Copayment,” was created for the months which have no error, but need to be recalculated because of an Income/AG error for a previous month.

**Example 1: Income/AG Corrections Affect Months Following a Change**

At her Wisconsin Shares renewal in January, Dia is at 190% FPL. CSAW places her in the Gradual Phase Out Copayment Period and calculates her copay at the 190% FPL level. In May, Dia reports that her income has decreased to 160% FPL. The new, decreased income is not entered timely. The system keeps Dia in Gradual Phase Out and continues to calculate her copayment at the 190% FPL level. In June, Dia’s income returns to 190% FPL. The error for the May income is discovered in late June.

A correction needs to be completed for May: the May calculation used 190% FPL, but Dia’s actual FPL for May was 160%. A correction also needs to be completed for June even though there is no error in June (the June calculation used 190% FPL, and Dia’s actual FPL for June was 190%). The May correction will move Dia to the Stabilization period, and set her Capped FPL at 160% FPL. The June correction will recalculate the June subsidy according to the new Copay Period of Stabilization, and the new Capped FPL of 160%.

**Reason Codes: “Eligibility Error” versus “Prior Income/AG Error – Copayment”**

Workers must use the “Eligibility Error” Reason Code for months which have an error in the income and/or AG size.

Workers must use the “Prior Income/AG Error – Copayment” Reason Code for months that have no income and/or AG size error, but follow a month which did have a income and/or AG size error.

**Example 2: “Prior Income/AG Error – Copayment” Correction for Months Following an Income/AG Correction**

In Example 1, Dia is at 190% FPL and in the Gradual Phase Out Copayment Period. Her income decreases in May, and places her at 160% FPL; then her income increases again to the 190% FPL level for June. The new information is not entered timely and CSAW keeps Dia in Gradual Phase Out period with her Copayment per Hour at the 190% FPL level. The error is discovered in late June.

May Correction

The worker creates a PLBC request for May using the “Eligibility Error” reason code. This is because there is an error in the income for May: CSAW thought the actual FPL was 190%, but it should have been 160%. The worker enters Dia’s correct income for May, and PLBC places Dia in the Stabilization period for May and recalculates the May Copayment per Hour according to 160% FPL. CSAW will automatically use the corrected period and 160% Capped FPL for any new subsidy calculations. However, the subsidy amount for June was already issued and is in Processed status.

June Correction

There is no error in the June FPL: CSAW used 190% FPL, and Dia’s actual FPL for June is 190%. However, there was an error in the FPL for May. This means that the worker must create a PLBC request for June,

too. The worker must use the “Prior Income/AG Error – Copayment” reason code for the June request. CSAW will recalculate the June subsidy amount using the corrected Copayment Period of May, and the Capped FPL of 160% FPL.

**Example 3: “Prior Income/AG Error – Copayment” Correction for a Determination Month with No Processed Subsidy**

Francisco has a renewal in June and his income places him at 150% FPL, which means he is in the Stabilization Copayment Period with a Capped FPL of 150% FPL. Francisco requests authorizations for his son, Miguel. Miguel will be staying with relatives for the entire month of July, and Francisco tells the authorization worker that Miguel does not need an authorization for July.

Francisco’s income drops to 130% FPL for July. Francisco calls and reports the loss of income, but **the new information is entered incorrectly** and the system continues to calculate according to the Capped FPL of 150%. Since Francisco is in the Stabilization period, the drop in income should have reset his Capped FPL to the lower 130% FPL.

In August, Francisco calls and reports that his income is back up to 150% FPL. The July income error is not discovered.

In September, the income error for July is discovered. There is no error in the actual FPL for August and September: the calculation used 150% FPL, and Francisco’s actual FPL was 150%. However, these months follow an Income/AG error, so the worker must create PLBC requests for them.

Normally, the worker would create an “Eligibility Error” PLBC for July; however, the worker cannot create a correction for July since there was no authorization or subsidy amount for July. The worker creates PLBC requests for August and September using the “Prior Income/AG Error – Copayment” Reason Code.

**Step Three: Enter Correction Details**

**Screen Title: Modify Correction – Case Attributes**

After Case Attributes are submitted, the *List of Corrections - Case Attributes* screen shows the Case PLBC request status as *Pending*. Now, correction details need to be added. To add correction information, select the pencil icon that corresponds to the initiated PLBC request month.

**List of Corrections - Case Attributes**

Case Details

Case Number: 1150988312  
 Primary: Julie Frederick  
 Address: 1202 Aberg Ave, Madison, WI 53714, Dane County

Admin Agency: Dane County (13)  
 RFA Date: 01/01/2018  
 Review Date: 12/31/2018  
 CC AG Status: Open

Benefit Month	Error Source	Reasons	Requested Date	Status	Corrections
January 2018	Client Error	Eligibility Error, Authorization Error	10/18/2018	Pending	

[New Correction](#)

You will be taken to the *Modify Correction – Case Attributes* page, where you can modify the case attributes and navigate to the appropriate correction pages. Select the corresponding correction link from the left side CSAW Menu based on the descriptions below. Multiple corrections can be added to the PLBC request for a month, but only one PLBC request can be in Pending, In Progress, or Calculated status at a time.

- **Income/AG:** Use this page to enter corrections to the case’s income or assistance group size
- **Eligibility/Copay/DOB:** Use this page to enter corrections to eligibility (marking a child ineligible), copay type, or date of birth.
- **Authorizations:** Use this page to enter the following corrections:
  - Authorization is invalid for a month (for example, it was made to the incorrect provider)
  - Begin and end dates
  - Schedule Type (Single, Two/Four Weeks)
  - Scheduled School Closed Hours
  - Rate Type

**Modify Correction - Case Attributes**

Case Details

Case Number: 1150988312  
 Primary Person: Julie Frederick  
 Address: 1202 Aberg Ave, Madison, WI 53714, Dane County

Admin Agency: Dane County (13)  
 RFA Date: 01/01/2018  
 Review Date: 12/31/2018  
 CC AG Status: Open

**Modify Correction - Case Attributes**

Benefit Month: January 2018  
 Status: Pending  
 Error Source \*: Client Error  
 Responsible Party Indicator \*: Client  
 Reason \*: Eligibility Error  
 Secondary Reason: Authorization Error  
 Comments: Client untimely reported that the father was in he household. A correction for Income/AG/DOB and Authorizations

### Income/AG Size Corrections

Screen Title: *Income/AG Size - Correction*

On this page, you can correct the Income/AG information from CARES Worker Web (CWW) which was used for that month’s benefit calculations. This screen looks slightly different depending on the Reason Code selected on the *Modify Correction – Case Attributes* page. See the following sections for instructions on using either version of the page.

For either version, when you click the “Add” button on this page you will be taken back to the *Modify Correction – Case Attributes* page. From the *Modify Correction – Case Attributes* page, you can:

- Select another correction detail page link (*Income/AG* or *Authorizations*) in the CSAW Navigation Menu ; or
- If no other corrections need to be made, the PLBC request can be calculated by selecting the *Calculate* link.

**If Reason Code is NOT “Prior Income/AG Error – Copayment”**

In the screenshot below, CSAW displays the income and AG size that was used in the initial calculation in parenthesis to the right of the fillable boxes (highlighted in yellow). Enter the income and eligible member quantity (assistance group size) appropriately and then select *Add*.

This screen is slightly different if you entered a Reason Code of *Prior Income/AG Error – Copayment* on the *Case Attributes* page.

- **Determination Month:** The system will enter the Benefit Month
- **Income Amount for Month:** Enter the correct income for the Benefit Month.
- **Eligible Members for Month:** Enter the correct number of eligible assistance group (AG) members for the Benefit Month.

Due to Copayment Period rules (see the [Wisconsin Shares Child Care Policy and Process Handbook](#) Section 2.5.3 and all subsections), a change to the FPL for one month can affect following months by changing the AG's Copayment Period and/or Capped FPL. When you calculate an Income/AG Size correction, a soft-stop validation will remind you to create PLBCs for following months with Processed subsidy. For more information on how a correction to one month can affect the subsidy calculations for following months, see [the \*New Concept: A Change in FPL for One Month can Affect Subsidy for Following Months\*](#) section of this guide.

Please review the following warning

 Corrections to Income and/or AG Size may affect the copays for subsequent months. PLBCs should be completed for each subsequent month with processed benefits to recalculate the copay. There are processed benefits for July 2018, June 2018, May 2018.

### If Reason Code is “Prior Income/AG Error – Copayment”

The “Prior Income/AG Error – Copayment” reason code is used when there is no error in the actual income and/or AG size for the Benefit Month, but there was an income and/or AG error in a prior month. For more information on how a correction to one month can affect the subsidy calculations for following months, see the [New Concept: A Change in FPL for One Month can Affect Subsidy for Following Months](#) section of this guide. For more information on when to use the “Prior Income/AG Error – Copayment” reason code, see the section of this guide titled *Reason Codes: “Eligibility Error” versus “Prior Income/AG Error – Copayment.”*

**Note:** Remember that the Determination Month and the Benefit Month are different for the “Prior Income/AG Error – Copayment” scenario. The income/AG for the Benefit Month are correct; you are telling the system to reconsider the copayment for the Benefit Month because the income/AG was incorrect in a *previous* month, the “Determination Month.”

- **Determination Month:** Enter the month for which the income and/or AG size was incorrect.
  - If you enter the Benefit Month as the Determination Month, a hard-stop validation will remind workers that these months cannot be the same. Remember, the “Prior Income/AG Error – Copayment” code is used for months which do not have an income and/or AG size error, but follow a month which did have an income and/or AG size error.
- **Income Amount for Determination Month:** Enter the correct income for the Determination Month (the month for which the Income/AG was incorrect).
- **Eligible Members for Determination Month:** Enter the correct number of eligible assistance group (AG) members for the Determination Month (the month for which the Income/AG was incorrect).

**Example 4: Using the *Income/AG Size – Correction* Screen with the *Prior Income/AG Error – Copayment* Reason Code**

This is an extension of Example 2 in the [Reason Codes: “Eligibility Error” versus “Prior Income/AG Error – Copayment”](#) section. Dia is at 190% FPL and in the Gradual Phase Out Copayment Period. Her income decreases in May, and places her at 160% FPL; then her income increases again to the 190% FPL level for June. **The new information is not entered timely and** the system does not change Dia’s May income to 160% FPL.

The error is discovered in late June. The worker creates a PLBC request for May using the “Eligibility Error” reason code, and corrects the May income. The worker then creates a PLBC request using the “Prior Income/AG Error – Copayment” Reason Code for June.

For the June PLBC request, the worker navigates to the *Income/AG Size - Correction* page. The worker enters May in the “Determination Month” field, enters the correct May income in the “Income for Determination Month” field, keeps the same number of members in the “Eligible Members for Determination Month” field, and enters comments. PLBC calculates subsidy amount for June with the corrected copayment period of Stabilization and the Capped FPL of 160%.

**Eligibility/Copay/DOB Corrections**

**Screen Title: *Eligibility/Copay/DOB - Correction***

Select the link for the child(ren) for whom **eligibility should be switched to No, or a correction needs to be made to the** copay or date of birth.

**Eligibility/Copay/DOB - Correction**

**Case Details**

<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open

**Correction Request Details**

<b>Benefit Month</b>	January 2018	<b>Correction Type</b>	Client Error
<b>Reasons</b>	Eligibility Error, Authorization Error	<b>Correction Status</b>	In Progress
<b>Requested Date</b>	10/18/2018		

**Children with benefit in January, 2018**

Child's Name	Pin	Date of Birth
Leo [REDACTED]	1585283738	01/01/2015

▲ - Indicates that corrections details exist.

The child's *Eligibility/Copay/DOB – Correction* page will load. Enter the correction details.

- **Eligibility Switch:** Change the “Eligibility Switch” radio button to No if the child should not have been eligible for the month; and/or
- **Date of Birth:** Enter the child’s correct Date of Birth
- **Copay Type:** If it is appropriate to change the child’s copayment type (see Note below), choose the child’s correct Copayment Type from the drop-down menu

**Note:** Workers must only enter a new Copay Type in PLBC if it positively affects that child’s subsidy amount (changing from Regular to any other type, or changing from a Minimal Type to a \$0 Type). If the change will negatively impact the child’s subsidy amount (changing from any other type to Regular, or changing from a \$0 type to a Minimal type), see the [Processing Various Change Scenarios User Guide](#) for entering that change. See the [Wisconsin Shares Child Care Policy and Process Handbook](#) section 2.5.2 for information on Regular and Reduced (\$0 and Minimal) Copayment Types.

**Eligibility/Copay/DOB - Correction**

**Case Details**

<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open

**Individual Details**

<b>Name</b>	Leo Frederick	<b>PIN</b>	1585283738
<b>Date of Birth</b>	01/01/2015		

**Correction Request Details**

<b>Benefit Month</b>	January 2018	<b>Correction Type</b>	Client Error
<b>Reasons</b>	Eligibility Error,Authorization Error	<b>Correction Status</b>	In Progress
<b>Requested Date</b>	10/18/2018		

**Children with benefit in January, 2018**

**Eligibility Switch**  Yes  No

**Date Of Birth \*** 1/1/2015 (01/01/2015)

**Copay Type \*** Regular (Regular)

**Comments**

0 of 300 characters.

**Add >**

When the correction details are entered, selecting the “Add” button. This will return you to the case *Eligibility/Copay/DOB – Correction* page.

After an eligibility, copay or DOB correction has been entered for a child, a yellow triangle with an exclamation point will appear next to their name on the *Eligibility/Copay/DOB – Correction* page.

The following options are then available:

- Make Eligibility/Copay/DOB corrections to other applicable children on the case by selecting that child’s name link; or
- Select another correction detail page link (*Income/AG* or *Authorizations*) in the CSAW Navigation Menu to add or modify; or
- Select the *Calculate* link in the CSAW Menu if no other corrections need to be made for the PLBC request.

**Eligibility/Copay/DOB - Correction**

**Case Details**

<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open

**Correction Request Details**

<b>Benefit Month</b>	January 2018	<b>Correction Type</b>	Client Error
<b>Reasons</b>	Eligibility Error,Authorization Error	<b>Correction Status</b>	In Progress
<b>Requested Date</b>	10/18/2018		

**Children with benefit in January, 2018**

Child's Name	Pin	Date of Birth
Leo [REDACTED]	1585283738	01/01/2015

▲ - Indicates that corrections details exist.

**Calculate**

## Authorization Corrections

Screen Titles: *Authorization Correction List; Authorization Correction*

On the *Authorization Correction List* page, select the link for the child(ren) for whom a correction to an authorization needs to be made.

**Authorization Correction List**

**Case Details**

<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open

**Correction Request Details**

<b>Benefit Month</b>	January 2018	<b>Correction Type</b>	Client Error
<b>Reasons</b>	Eligibility Error, Authorization Error	<b>Correction Status</b>	In Progress
		<b>Requested Date</b>	10/18/2018

**List of Authorizations for Initial benefit in January, 2018**

Child's Name	Date of Birth	Effective Authorization Period	Average Weekly Hours	Average Weekly Full Time Hours	Average Weekly Above Full Time Hours	Provider Location Details
Leo [REDACTED]	01/01/2015	01/01/2018 - 01/31/2018	21:15	21:15	00:00	9800039909-001 Nordic Wonderland 123 Modified Address Rd, Northwoods, WI 45454

⚠ - Indicates that corrections details exist.

Selecting the child's link will open the child's *Authorization Correction* page.

On the child's *Authorization Correction* page, correct the necessary information based on the descriptions below:

- **Authorization is invalid for a month:** Use this when the authorization should not have been given for the month or if the authorization was not utilized for the month. Note that if the child should have been ineligible for Wisconsin Shares that month, the *Eligibility/Copay/DOB* page should be used.
- **Begin Date:** Use this field when the begin date of the authorization needs to be corrected. The authorization begin date should not be changed in most circumstances. Please see the [When to Change Begin and End Dates for an Authorization](#) section for further details.
- **End Date:** Use this field when the end date of the authorized needs to be corrected. The authorization end date should not be changed in most circumstances. Please see the [When to Change Begin and End Dates for an Authorization](#) section for further details.
- **Schedule Type:** Use this radio button when there needs to be a correction to the schedule type of Single or Two/Four Weeks and the amount of weekly hours. This will default to single week, regardless of the actual schedule type of the children. Changes can still be made to children with Two/Four Week Schedule types.
  - The PLBC system does not have functionality to calculate the amount of authorized hours needed. Below are the three options that can be used to calculate this amount:
    - Often, the CSAW future authorization (calculation) has the correct number of weekly hours, so that information can be used for this field, if applicable.
    - Another option to find the corrected number of authorized hours is to create a future authorization filling out the Case Summary screens with past information and deriving weekly hours without confirming the Authorization.

- Workers manually calculate the corrected amount of weekly hours that will be used. The Child Care Authorization Worksheet ([DCF-F-2742](#)) is recommended. The system will then take the corrected weekly amount and automatically arrive at an average monthly amount.
- **Scheduled School Closed Hours:** Use this field when hours for scheduled school closures need to be corrected.
- **Rate Type:** Use this drop-down to correct a Regular, Part-Time, Override (Discount), Override (In-Home), Override (Special Need) provider price. This field also may need to be changed when Schedule Type hours are corrected and a corresponding Full or Part-Time provider price should be used for the correct subsidy calculation.
  - **Example:** When Schedule Type hours are lowered from 40 hours to 19, then the Provider Price type of "Part-Time" must be used.
- **Comments:** Use this field to explain further details as to why the PLBC - Authorization Correction is being initiated.

**NOTE:** The following fields cannot be modified because these values are generated automatically when corrections are entered in the Hours field under *Schedule Type Hours*.

- **New Average Weekly Hours:** Displays the updated Schedule Type weekly hours. Numbers in parenthesis display the original weekly hours used for the previous calculation.
- **New Average Weekly Hours (Full Time):** Displays the updated *Schedule Type* weekly hours used for the subsidy benefit calculation (up to 35).
- **New Average Weekly Hours (Above Full Time):** Displays the updated *Schedule Type* weekly hours higher than 50. For example, if the New Average Weekly Hours was 75, the New Average Weekly Hours (Above Full Time) would be 25. This is due to the subsidy calculation, which is designated to calculate amounts for 0-35 hours a week, and again for 50-75 hours a week.

See following sections for instructions on adding or deleting average weekly hours, adding or deleting scheduled school closed hours, and when to change begin and end dates for an authorization.

Select the “Submit” button when all of the authorization corrections are completed. **Selecting the “Submit” button will take you to the *Authorization Correction List* page** and a yellow triangle with an exclamation point will appear next to their name to indicate that a correction has been made.

The following options are then available:

- Make Authorization corrections to other applicable children on the case by selecting the child’s name link; or
- Select another correction detail page link (*Income/AG* or *Eligibility/Copay/DOB*) link in the CSAW Navigation Menu to add or modify; or
- Select *Calculate* link in the CSAW Menu if no other corrections need to be made for the PLBC request.

**Authorization Correction List**

**Case Details**

<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open

**Correction Request Details**

<b>Benefit Month</b>	January 2018	<b>Correction Type</b>	Client Error
<b>Reasons</b>	Eligibility Error, Authorization Error	<b>Correction Status</b>	In Progress
<b>Requested Date</b>	10/18/2018		

**List of Authorizations for Initial benefit in January, 2018**

Child's Name	Date of Birth	Effective Authorization Period	Average Weekly Hours	Average Weekly Full Time Hours	Average Weekly Above Full Time Hours	Provider Location Details
Leo [REDACTED]	01/01/2015	01/01/2018 - 01/31/2018	21:15	21:15	00:00	9800039909-001 Nordic Wonderland 123 Modified Address Rd, Northwoods, WI 45454

⚠ - Indicates that corrections details exist.

### Adding or Deleting Average Weekly Hours

When the average weekly authorized hours need to be modified for the currently authorized period within the month, begin and end dates for the authorization period must remain the same. Changing the begin and end dates tell the system that the child should only have been authorized for the period between the new begin and end dates.

**Example:** Joe has an authorization for May 1 – May 31. Joe’s dad has a schedule increase for the last two weeks of the month and requests additional hours prior to the change on May 10. If the worker changes the begin and end dates for the authorization, CSAW will think that Joe should have only been authorized for two weeks instead of four, and will create an overpayment instead of adding an additional payment. Rather than changing the begin and end dates, the worker should change the authorization to a four-week schedule and add the additional hours to weeks three and four.

First, change the “Schedule Type” radio button to “Two/Four Weeks”. This will cause four fields to display below. These fields represent the hours and minutes for week one, week two, week three and week four.

Second, override the hours/minutes for the applicable week(s). Notice that the current weekly authorized hours will only be filled in for week one. You must manually enter the current weekly authorized hours for each week that does not need a correction to the number of authorized hours. The override hours field(s) format is two digits for hours, a colon, then two digits for minutes (HH:MM).

#### Example: Adding Hours

Julie worked an extra 10 hours in week 3 and in week 4 in the month of January 2018, which was reported timely. The worker selects the Schedule Type Two/Four Weeks (see screenshot below).

Latest Authorization Details						
Child's Name	Date of Birth	Effective Authorization Period	Average Weekly Hours	Average Weekly Full Time Hours	Average Weekly Above Full Time Hours	Provider Location Details
Leo [REDACTED]	01/01/2015	01/01/2018 - 01/31/2018	21:15	21:15	00:00	9800039909-001 Nordic Wonderland 123 Modified Addrss Rd, Northwoods, WI 45454

Authorization Correction	
Is this authorization Invalid for this month?	<input checked="" type="radio"/> No <input type="radio"/> Yes
Begin Date *	01/01/2018 (01/01/2018)
End Date *	01/31/2018 (01/31/2018)
Schedule Type	<input type="radio"/> Single Week <input checked="" type="radio"/> Two/Four Weeks
	21:15! 00:00! 00:00! 00:00!
New Average Weekly Hours	5:19 (21:15)
New Average Weekly Hours(Full Time)	5:19 (21:15)
New Average Weekly Hours(Above Full Time)	0:00 (00:00)

Then the worker overrides week two to 21:15 hours (21 hours and 15 minutes). The worker also overrides weeks three and four to 31:15 hours, which is adding the weekly average of 21:15 to the additional 10 hours each as shown in the screenshots below.

Latest Authorization Details						
Child's Name	Date of Birth	Effective Authorization Period	Average Weekly Hours	Average Weekly Full Time Hours	Average	Provider Location Details
Leo [REDACTED]	01/01/2015	01/01/2018 - 01/31/2018	21:15	21:15		

Authorization Correction	
Is this authorization Invalid for this month?	<input checked="" type="radio"/> No <input type="radio"/> Yes
Begin Date *	01/01/2018 (01/01/2018)
End Date *	01/31/2018 (01/31/2018)
Schedule Type	<input type="radio"/> Single Week <input checked="" type="radio"/> Two/Four Weeks
	21:15! 21:15! 31:15! 31:15!
New Average Weekly Hours	26:15 (21:15)
New Average Weekly Hours(Full Time)	26:15 (21:15)
New Average Weekly Hours(Above Full Time)	0:00 (00:00)

Originally the system used 21:15 multiplied by 4.348125 to make a monthly hourly amount of 92.39, rounded up to 93 hours.

When changing the schedule type to Two/Four Weeks, those hours need to be maintained by overriding the 0's to 21:15 and then adding on any extra hours that the parent needs that are reported timely.

**Example: Subtracting Hours**

In February, the agency discovers that Julie’s child care need dropped from 21:15 hours (21 hours, 15 minutes) per week to 11:15 hours (11 hours, 15 minutes) for week three and four in January. The worker considers several factors and determines that a PLBC is correct per policy. The worker creates a PLBC request, then selects the Schedule Type of “Two/Four Weeks”. Then the worker overrides Week Two to 21:15 hours and overrides Weeks Three and Four to 11:15 hours, which is subtracting ten hours from the weekly average of 21:15, as shown in the screenshot below.

Latest Authorization Details						
Child's Name	Date of Birth	Effective Authorization Period	Average Weekly Hours	Average Weekly Full Time Hours	Average Weekly Above Full Time Hours	Provider Location Details
Leo [REDACTED]	01/01/2015	01/01/2018 - 01/31/2018	21:15	21:15	00:00	9800039909-001 Nordic Wonderland 123 Modified Addrsss Rd, Northwoods, WI 54544

Authorization Correction	
Is this authorization Invalid for this month?	<input checked="" type="radio"/> No <input type="radio"/> Yes
Begin Date *	01/01/2018 (01/01/2018)
End Date *	01/31/2018 (01/31/2018)
Schedule Type	<input type="radio"/> Single Week <input checked="" type="radio"/> Two/Four Weeks
	21:15! 21:15! 11:15! 11:15!
New Average Weekly Hours	16:15 (21:15)
New Average Weekly Hours(Full Time)	16:15 (21:15)
New Average Weekly Hours(Above Full Time)	0:00 (00:00)

### Adding or Deleting Hours for Scheduled School Closed Hours

When the Scheduled School Closed Hours need to be modified for the current month, you must not change begin and end dates for the authorization period. Changing the begin and end dates tells the system that the child should only have been authorized for the period between the new begin and end dates.

To add or subtract hours for the month, enter the new total Scheduled School Closed Hours for the month in the "Scheduled School Closed Hours" field. The system will not allow you to enter a decimal in this field, so the new total Scheduled School Closed Hours must be rounded up. The currently authorized Scheduled School Closed Hours are listed in parenthesis to the right.

#### Example: Adding Scheduled School Closed Hours to a Zero Hour Authorization

Julie reported timely that she needs 16 school closed hours for the month of January for time when her son Leo is on break from 4K. This is for two days when she is working seven hours per day and needs one hour of travel. Julie has no before or after school care, but a zero hour authorization is already in place for the month to the correct provider (see screenshot below).

Latest Authorization Details						
Child's Name	Date of Birth	Effective Authorization Period	Average Weekly Hours	Average Weekly Full Time Hours	Average Weekly Above Full Time Hours	Provider Location Details
Leib [REDACTED]	01/01/2011	08/01/2019 - 08/31/2019	42:30	35:00	00:00	3800036563-001 Randy's Group Care 205 Corporate Dr, Madison, WI 53714-2408

Authorization Correction	
Is this authorization Invalid for this month?	<input checked="" type="radio"/> No <input type="radio"/> Yes
Begin Date *	08/06/2019 (08/01/2019)
End Date *	08/31/2019 (08/31/2019)
Schedule Type	<input checked="" type="radio"/> Single Week <input type="radio"/> Two/Four Weeks
	42:30
New Average Weekly Hours	42:30 (42:30)
New Average Weekly Hours(Full Time)	35:00 (35:00)
New Average Weekly Hours(Above Full Time)	0:00 (00:00)
Scheduled School Closed Hours	16 (0)
Rate Type *	Full-Time (Full-Time)

Add or Delete Scheduled School Closed Hours from the hours already listed.

For example, no scheduled school hours were added for the month January, as shown by the (0) to the right of the box, but the parent reported timely that 16 hours are need. Therefore, the worker needs to override 0 to 16.

**Example: Adding Scheduled School Closed Hours to a Before and After School Authorization**

Julie reported timely that she needs additional care for an in-service day in September for her school-age child. Her child already has an authorization for before and after school care. Currently, the child has average weekly hours of 7.5 for Julie’s five days of work. That equals 1.5 hours per day, which includes travel. The child needs a total of 9 hours for the day, but since she already has 1.5 hours per day, she only needs an additional 7.5 hours. Those 7.5 hours need to be added to the 4 Scheduled School Closed hours already listed for the month (7.5 + 4 = 11.5; which is rounded up to 12).

**When to Change Begin and End Dates for an Authorization**

Most often, the authorization begin or end dates will not be changed in a PLBC request. The authorization begin and/or end date must only be changed if the original authorization period is incorrect. To correct the begin and/or end date, select the calendar icon or enter the corrected date in the appropriate field.

When you change an authorization’s begin and/or end dates, PLBC considers authorization days outside of the new authorization period to be invalid and subtracts them from the benefit calculation.

**Example: Correcting the Begin Date**

Julie’s RFA date was 1/1/2018. Therefore the authorization begin date is 1/1/2018. On 1/25/18, the parent reports that the child did not start attending the child care until 1/15/2018, therefore the authorization begin date was incorrect. The worker determines that a PLBC request is necessary.

The worker navigates to the *Authorization Correction* page, chooses the child’s name, and changes the authorization begin date from 1/1/2018 to 1/15/2018 (see screenshot below).

Latest Authorization Details						
Child's Name	Date of Birth	Effective Authorization Period	Average Weekly Hours	Average Weekly Full Time Hours	Average Weekly Above Full Time Hours	Provider Location Details
Leo [REDACTED]	01/01/2015	01/01/2018 - 01/31/2018	21:15	21:15	00:00	9800039909-001 Nordic Wonderland 123 Modified Address Rd, Northwoods, WI 45454

Authorization Correction	
Is this authorization Invalid for this month?	<input checked="" type="radio"/> No <input type="radio"/> Yes
Begin Date *	01/15/2018 (01/01/2018)
End Date *	01/31/2018 (01/31/2018)
Schedule Type	<input checked="" type="radio"/> Single Week <input type="radio"/> Two/Four Weeks
	21:15
New Average Weekly Hours	21:15 (21:15)
New Average Weekly Hours(Full Time)	21:15 (21:15)
New Average Weekly Hours(Above Full Time)	0:00 (00:00)

**Step Four: Calculate and Review**

**Calculate Benefit Adjustment**

Screen Title: Calculate Correction - Case Attributes

Review the attributes information. If all correction information has been entered for the month, select the "Calculate Benefit" button. PLBC will use the attributes and corrections for that PLBC request to calculate a benefit adjustment.

Calculate Correction - Case Attributes			
<b>Case Details</b>			
Case Number	1150988312	Admin Agency	Dane County (13)
Primary Person	Julie [REDACTED]	RFA Date	01/01/2018
Address	1202 Aberg Ave Madison, WI 53714 Dane County	Review Date	12/31/2018
		CC AG Status	Open
<b>Calculate Correction - Case Attributes</b>			
Benefit Month	January 2018		
Status	In Progress		
Error Source	Client Error		
Responsible Party Indicator	Client		
Reason	Eligibility Error		
Secondary Reason	Authorization Error		
Comments	Client untimely reported that the father was in he household.  A correction for Income/AG/DOB and Authorizations needs to be made		
		 <input type="button" value="Calculate Benefit"/>	

Because a correction to one month can affect the subsidy calculations for subsequent months, workers must calculate PLBC requests in sequential order. For example, if an income decrease occurred in March and it is now May, you must enter PLBC requests for March, April, and May. These PLBC requests must be calculated in chronological order: first March, then April, then May. A hard-stop validation will stop workers from calculating out of order.

**The following error has occurred**

✘ PLBC corrections must be calculated in sequential order according to the calendar: earlier months must be calculated before later months. Reset calculations for the following month(s), then calculate the PLBC corrections in sequential order: December 2017.

**Important:** If you calculate a PLBC request, but do not intend to Confirm it before the end of the day, reset the calculation (see the [Resetting the Calculation](#) section of this guide). This will return the PLBC request to In Progress status and ensure it does not impact a family's subsidy amount prematurely.

## Review Benefit Adjustment

**Screen Titles:** *Calculation Correction and Confirm Benefit Changes By Case*; *Calculation Details*

After a PLBC request has been calculated for a child, the following options are available:

- Review calculation totals for Previous Benefit, Current Benefit, or Calculated Change information.
  - **NOTE:** Negative adjustment calculations are shown in parenthesis.
- Select the *Reset Calculation* link if you need to make any additional modifications to the PLBC. This will take you back to the *Correction of Case* screen and reset the PLBC's status to "In Progress".
- Review the "Apply To" value to ensure it is correct. For information on "Apply To" functionality, how to determine if it is correct, and what to do if it is not, see the [PLBC "Apply To" Functionality](#) section.

**Important:** If the PLBC case also has a retro authorization in Completed or Calculated status for the same Benefit Month, PLBC will incorporate that authorization's details in the PLBC calculation. Selecting the "Confirm Benefit" button will also confirm the authorization benefits. This is correct functionality and will allow the PLBC changes and retro authorization changes to occur on the same night.

To view PLBC adjustment calculation details, select the "Calculated Change" amount link for the applicable child. For further information on viewing the calculation details, see the [PLBC Calculations and Calculation Details](#) section of this guide.

Calculation Correction And Confirm Benefit Changes By Case							
<b>Case Details</b>							
<b>Case Number</b>	1150988312			<b>Admin Agency</b>	Dane County (13)		
<b>Primary Person</b>	Julie [REDACTED]			<b>RFA Date</b>	01/01/2018		
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County			<b>Review Date</b>	12/31/2018		
				<b>CC AG Status</b>	Open		
<b>Correction Request Details</b>							
<b>Benefit Month</b>	January 2018			<b>Correction Type</b>	Client Error		
<b>Reasons</b>	Eligibility Error,Authorization Error			<b>Correction Status</b>	Calculated		
<b>Requested Date</b>	10/18/2018						
 Click the Excel icon above to download the data in Excel format.							
<b>Benefit Change Details</b>							
Child's Name	Date of Birth	Provider Details	Previous Benefit	Current Benefit	Calculated Change	Remaining Balance	
Leo [REDACTED]	01/04/2010	0000000000-001 Nordic Wonderland 123 Modified Addrss, Northwoods , WI 45454	1186.93	1373.86	(\$186.93)	\$376.65	Apply To Family ▾

**Step Five: Confirm**

**Confirm the Adjustment**

Screen Title: Calculation Correction and Confirm Benefit Changes by Case

If all details are correct, select the "Confirm Benefit" button.

What happens to the Benefit Adjustment when you Confirm			
If Calculated Change is	And Apply To is	PLBC Will	Follow-up Actions Are
Positive	Family or Provider	Apply the adjustment to the party indicated	None
Negative	Family or Provider	Not apply the adjustment directly	Enter the adjustment into Benefit Recovery (BV), and create BRITS referral if applicable
Positive or Negative	Not Apply	Not apply the adjustment	None

**Calculation Correction And Confirm Benefit Changes By Case**

**Case Details**

Case Number: 1150988312      Admin Agency: Dane County (13)  
 Primary Person: Julie [REDACTED]      RFA Date: 01/01/2018  
 Address: 1202 Aberg Ave      Review Date: 12/31/2018  
 Madison, WI 53714      CC AG Status: Open  
 Dane County

**Correction Request Details**

Benefit Month: January 2018      Correction Type: Client Error  
 Reasons: Eligibility Error, Authorization Error      Correction Status: Calculated  
 Requested Date: 10/18/2018

Click the Excel icon above to download the data in Excel format.

**Benefit Change Details**

Child's Name	Date of Birth	Provider Details	Previous Benefit	Current Benefit	Calculated Change	Remaining Balance	
Leo [REDACTED]	01/01/2015	9800039909-001 Nordic Wonderland 123 Modified Address, Northwoods, WI 45454	\$376.65	\$189.72	(\$186.93)	\$376.65	Apply To Family ▼

Confirm Benefit

In some circumstances, confirming the PLBC will bring you to the Offset page. For more information on the Offset function, see the following [Offset](#) section of this guide.

If a child's subsidy amount is reduced due to a negative adjustment, the reduction in the corresponding YoungStar adjustment will be applied automatically to the provider's next YoungStar bonus.

### PLBCs and Retro Authorizations on the Same Day

#### Allowing Monthly Load

As of April 26, 2019, a PLBC request in Calculated or Confirmed status on the last business day of the month will no longer cause the monthly benefit load to fail for cases associated with that PLBC request. This is true for both **Case** and **Provider** PLBC requests.

#### Resetting Calculation for PLBCs Left in Calculated Status

PLBC requests enter Calculated status when a worker calculates the request, but does not confirm the PLBC request calculation. Each night, the system will automatically reset the calculation for **Case** and **Provider** PLBC requests left in Calculated status. The PLBC status will return to In Progress. This functionality prevents unconfirmed PLBC requests from affecting the family's future benefit amounts.

#### Summary of PLBC-Retro Auth Changes

(See chart on following page)

PLBC Request Type	PLBC Status	Can Calculate Retro Auth?	Worker Action	Resulting Status (after overnight batch run)
Case	Calculated OR Confirmed	Yes	Click "Confirm" on <i>Confirm/Apply Case Benefit Changes</i> page*	PLBC & retro auth = Processed
Provider	Calculated	Yes	Click "Confirm" on <i>Confirm/Apply Case Benefit Changes</i> page	<ul style="list-style-type: none"> <li>• PLBC <b>not</b> confirmed before end of day: PLBC = In Progress; retro auth = Processed</li> <li>• PLBC confirmed before end of day: PLBC &amp; retro auth = Processed</li> </ul>
	Confirmed	No	Wait until PLBC is processed, then calculate retro auth	PLBC = Processed; Retro auth = Completed

\* If the **Case** PLBC was in Calculated status, clicking "Confirm" on the *Confirm/Apply Case Benefit Changes* page will change the PLBC status to Confirmed

Allowing Retro Authorization Calculation

CSAW will no longer prevent workers from calculating retro authorizations (authorizations for a current or past month) when there is either a **Case** PLBC request in Calculated or Confirmed status or an associated **Provider** PLBC request in Calculated status.

However, CSAW will continue to prevent the worker from calculating retro authorizations if there is an associated **Provider** PLBC request in Confirmed status. If the worker tries to calculate benefits for a retro authorization, and there is an associated Provider PLBC request in Confirmed status, the worker will receive a validation. The worker must wait overnight to allow the Provider PLBC request to process before calculating the retro authorization.

**The following error has occurred**

 Benefits for this case cannot be calculated because there is a Provider PLBC in Confirmed status. Please wait until tomorrow to calculate benefits.

Confirm/Apply Case Benefit Changes Page

If there is a **Case** PLBC request in Calculated or Confirmed status, or a **Provider** PLBC request in Calculated status, and the worker calculates a retro authorization, CSAW will redirect the worker to a new *Confirm/Apply Case Benefit Changes* page. The page will show the effect of processing both the PLBC request and the retro authorization changes at the same time.

There are one or more PLBCs in Calculated or Confirmed status. The PLBC changes are automatically included in the calculations below.

Confirm/Apply Case Benefit Changes
Test Case

**Case Details**

<b>Case Number</b>	4150998647	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Tony Wonder	<b>RFA Date</b>	11/01/2017
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	N/A
		<b>CC AG Status</b>	Closed

**Retro/PLBC Benefit Details**

	Child's Name	Date of Birth	Provider Details	Previous Benefit	Current Benefit	Calculated Change	Remaining Balance	
▼	May 2018							
	Tonya Wonder	01/01/2011	9800039909-001 Nordic Wonderland 123 Modified Addrss, Northwoods , WI 45454	\$306.30	\$450.58	\$144.28	\$0.00	Apply To Family ▼
	Tonya Wonder	01/01/2011	0800039980-001 Lip Sticks House 201 East Johnson, Madison , WI 53704-9877	\$0.00	\$172.88	\$172.88	\$0.00	Apply To Family ▼

If the PLBC request is a **Case** PLBC request and worker chooses the “Confirm Benefits” button, both the retro authorization and the Case PLBC request will process overnight. If the Case PLBC request’s status was previously Calculated, choosing the “Confirm Benefits” button will change the PLBC request status to Confirmed.

If the PLBC request is a **Provider** PLBC request and the worker chooses the “Confirm Benefits” button, and the PLBC request is still in Calculated status at the end of the day since nobody has changed the status to Confirmed, the system will automatically reset the calculation for that PLBC. The PLBC will return to In Progress status. In this situation, the system will remove the PLBC request details from the calculation before the retro authorization benefits are loaded that night. This functionality prevents provider adjustments from affecting the family’s retro authorization amount.

If the worker determines that the Case or Provider PLBC should process before the retro authorization benefits are calculated, there is now a “Reset Authorization” button on the Authorization Summary page for cases with authorizations in Completed status.

Schedule Details [Edit](#) [Review Schedules](#)

Weekly Hours		Hours Used for Benefit Calculation	
	Week		Week
Hours Based on Schedule	07:30	Full Time	10:00
Travel Time	02:30	Above Full Time (50)	00:00
Total	10:00	Average Weekly Hours (Full Time):10:00	
Approved	10:00	Average Weekly Hours (Above Full Time):00:00	

**Average Weekly Authorized Hours:10:00**  
**Override Hours Related Comments**

---

School Closed Hours [Edit](#)

This authorization indicates no need for school closed hours.

Status Completed

If the worker determines that the PLBC should process before benefits are loaded for the retro authorizations, the next steps are:

1. Click the “Reset Authorization” button on the Authorization Summary page
  - a. This will remove the retro authorization(s) from consideration in the next calculation
2. Calculate Benefits
3. Calculate and Confirm PLBC(s)
4. Allow PLBC(s) to process overnight
5. Complete the Authorization again on the Authorization Summary page
6. Calculate Benefits for retro authorization(s)

**EXAMPLES:**

**Case PLBC Request Example**

Margaret is the daughter of single father, Jacque. Margaret is authorized to Cat’s Pajamas Daycare from January 1 to February 20. On January 30, Jacque begins working more hours and Margaret’s child care need increases.

On February 4, Jacque requests an increase to Margaret’s authorization hours. The worker determines that all requirements are met, and that an increase to the authorization hours is correct per policy. The worker creates a Case PLBC request to increase Margaret’s authorization hours for February. The worker calculates and confirms the PLBC request.

On the same day, Jacque requests a retro authorization for Margaret to Cat’s Pajamas for February 21 to February 28. The worker creates the authorization. When the worker completes the retro authorization and calculates benefits, they are taken to the *Confirm/Apply Case Benefit Changes* page. The page combines the increased hours from the PLBC with the new hours from the retro authorization, and shows the total effect to the benefit amount. The worker clicks “Confirm Benefits.”

Overnight, the amount from the *Confirm/Apply Case Benefit Changes* page loads and both the retro authorization and the PLBC request move into Processed status.

**Provider PLBC Request in Calculated Status Example**

Tyler is the son of single mother, Charisa. Tyler is authorized to Bee's Knees Daycare from February 22 to February 28.

On March 29, the Department of Children and Families (DCF) determines that Bee's Knees was overcapacity for two days in February. DCF creates a Provider PLBC request to recover funds for the two days when the provider was overcapacity. DCF calculates the PLBC request, but does not confirm it. The negative adjustment from this Provider PLBC request defaults to "Apply to Provider."

Also on March 29, Charisa calls her Wisconsin Shares agency to report that Tyler's authorization start date was supposed to be February 8, not February 22. The worker determines that an agency error was made and Charisa is correct. The worker completes a retro authorization to Bee's Knees for February 8 to February 21. When the Wisconsin Shares worker calculates benefits, they are taken to the *Confirm/Apply Case Benefit Changes* page. The page combines the negative adjustment from the Provider PLBC request (even though it should be applied to the provider) with the new hours from the retro authorization, and shows a new benefit amount. The worker clicks "Confirm Benefits."

At the end of the day, the PLBC request for Bee's Knees is still in Calculated status, and has not been Confirmed. The system resets the calculation for the Provider PLBC request and the PLBC status becomes "In Progress." The system loads the benefit amount for the new hours from the retro authorization without including the Provider PLBC details. The retro authorization moves into Processed status.

**Offset**

Corrections made to one child or one authorization on a case with multiple children or authorizations can result in subsidy amount adjustments for all authorized children because the family copayment is distributed across all children and all authorizations in the group. This can result in a smaller positive adjustment for one child and a larger negative adjustment for the other. This also may occur with corrections to AG/Income, which may affect the Federal Poverty Level (FPL), and therefore affect the Capped FPL, Copayment per Hour and Copayment Period.

This occurred with the PLBC request for Julie for the month of February. Tara had a positive adjustment amount of \$64.80. The other child on the case (Leo) had a negative adjustment amount of \$109.35. These amounts can be "Offset" against each other, so the parent has a smaller overpayment entered into the Benefit Recovery System. The subtraction of \$64.80 from \$109.35 results in a reduced overpayment amount of \$44.55 is shown in the screenshots below.

**Applying an Offset**

Screen Title: *Benefit Change Details; Calculation Correction and Offset Changes by Case*

To initiate an offset, subsidy amounts must first be confirmed.

Benefit Change Details							
Child's Name	Date of Birth	Provider Details	Previous Benefit	Current Benefit	Calculated Change	Remaining Balance	
Leo [REDACTED]	01/01/2015	9800039909-001 Nordic Wonderland 123 Modified Addrss, Northwoods , WI 45454	\$376.65	\$267.30	(\$109.35)	\$376.65	Apply To Family ▼
Tara [REDACTED]	01/01/2015	9800039909-001 Nordic Wonderland 123 Modified Addrss, Northwoods , WI 45454	\$376.65	\$441.45	\$64.80	\$376.65	Apply To Family ▼



Click on the "Offset Link" on the right side of the screen as shown below.

Offset Changes						
Child's Name	Date of Birth	Provider Details	Change In Benefit	Offset Amount	Balance	
Leo [REDACTED]	01/01/2015	9800039909-001 Nordic Wonderland 123 Modified Addrss, Northwoods , WI 45454	(\$109.35)	\$0.00	(\$109.35)	
Tara [REDACTED]	01/01/2015	9800039909-001 Nordic Wonderland 123 Modified Addrss, Northwoods , WI 45454	\$32.40	\$0.00	\$32.40	<input type="button" value="Offset"/>

After benefit confirmation, the PLBC system driver will display the *Calculation Correction and Offset Changes by Case* page. Click on the "Distribute" button located in the Offset Details section of this screen. This will auto populate the positive amount in the "Offset Amount" field. This field can also be entered/alterd manually by a worker. Then select the "Apply" button.

Offset Details			
<b>Child Name</b>	Tara [REDACTED]	<b>Change in Benefit</b>	\$64.80
<b>Date of Birth</b>	01/01/2015	<b>Offset Amount</b>	(\$64.80)
<b>Provider Details</b>	9800039909-001 Nordic Wonderland 123 Modified Addrss Rd Northwoods, WI 45454	<b>Balance</b>	\$0.00

Amounts From Current Month							
Child's Name	Date of Birth	Provider Details	Month	Status	Overpayment	Offset Amount	Net Remaining balance
Leo [REDACTED]	01/01/2015	9800039909-001 Nordic Wonderland 123 Modified Addrss, Northwoods , WI 45454	March 2018	Confirmed By Worker	(\$109.35)	64.80	(\$109.35)

Amounts From Other Months							
Child's Name	Date of Birth	Provider Details	Month	Status	Overpayment	Offset Amount	Net Remaining balance
Leo [REDACTED]	01/01/2015	9800039909-001 Nordic Wonderland 123 Modified Addrss, Northwoods , WI 45454	January 2018	Ready To Refer To Benefit Recovery	(\$48.60)	\$0.00	(\$48.60)

After it is applied, the offset amount will be displayed on the *Calculation Correction and Offset Changes by Case* page. **The Calculation Correction and Offset Changes by Case page can be reached by clicking the Offset Changes link in the CSAW Menu, or by clicking the Offset Changes link on the Calculation Correction And Confirm Benefit Changes By Case page.**

Offset Changes						
Child's Name	Date of Birth	Provider Details	Change In Benefit	Offset Amount	Balance	
Leo [REDACTED]	01/01/2015	9800039909-001 Nordic Wonderland 123 Modified Addrss, Northwoods , WI 45454	(\$109.35)	\$64.80	(\$44.55)	
Tara [REDACTED]	01/01/2015	9800039909-001 Nordic Wonderland 123 Modified Addrss, Northwoods , WI 45454	\$64.80	(\$64.80)	\$0.00	Offset

### Undoing an Offset

You can undo an offset, if needed, by clicking on the *Reset Calculation* link in CSAW Menu. This also will undo the calculations of the PLBC request. You will then be directed back to the *Correction of Case* screen where you can either edit or delete the PLBC.

## Creating a New Provider PLBC Request

Corrections can also be made to child care providers. The search functions are the same for the PLBC Provider Module as the Case Module. For instructions on finding a provider’s PLBC pages, see the [Accessing PLBC and Adhoc](#) section of this guide.

The basic steps to creating a new Provider PLBC Request are:

- Step One: Select “New Correction”
- Step Two: Enter information into the Provider Attributes page
- Step Three: Enter Correction Details
- Step Four: Calculate and Review
- Step Five: Confirm (if Correct)

### ***Step One: Select New Correction***

**Screen Title:** *List of Corrections - Provider Attributes*

This page is reached by clicking *Correction of Provider* in the left-hand navigation menu. For information about finding the *Correction of Provider* link, which will bring you to the *List of Corrections* page, see the [Accessing PLBC and Adhoc](#) section of this guide.

The *List of Corrections - Provider Attributes* page displays any initiated PLBC requests. This includes information on the Benefit Month, Error Source, Reasons, Requested Date, Status, Correction, and Benefits Changes.

PLBC only allows one PLBC request per month in Pending, In Progress, Calculated, or Confirmed Status. If you need to make an additional correction to the month and the existing correction is in Pending or In Progress status, you can add the additional correction details. If it is in Calculated or Confirmed Status, you can reset the calculation and add the additional correction details. Once the correction is listed as processed, a new one can be entered for the same month.

Select the *New Correction* link to initiate a new request.

List of Corrections - Provider Attributes							
Child Care Provider Location Details							
<b>Provider/Location#</b>	9800039909/001	<b>Months Open</b>	Jan-Dec				
<b>Provider Name</b>	Nordic Wonderland	<b>Night Capacity</b>	0				
<b>Location Name</b>	Nordic Wonderland	<b>Day Capacity</b>	50				
<b>Phone #</b>	(555) 555-5555	<b>Hours: MON-FRI</b>	6:00AM - 6:00PM				
<b>Address</b>	123 Modified Addrss Rd Northwoods WI 45454	<b>SAT-SUN</b>	Closed				
List of Corrections - Provider Attributes							
Benefit Month	Error Source	Reasons	Requested Date	Status	Corrections		
December 2018	Agency Error	Youngstar Retroactive Positive Adjustment - Rating Error	12/19/2018	Processed	<a href="#">Accreditation/Star Level</a>	<a href="#">Benefit Changes</a>	
February 2018	Agency Error	Authorization Error	11/19/2018	In Progress	<a href="#">Authorization End</a>		 
September 2016	Agency Error	Provider Price Error	10/20/2016	In Progress	<a href="#">Accreditation/Star Level</a>		 
					<a href="#">Authorization End</a>		
<a href="#">New Correction</a>							

### **Step Two: Enter Attributes**

Screen Title: *New Correction - Provider Attributes*

Selecting “New Correction” on the *List of Corrections – Provider Attributes* page will bring you to the *New Correction – Provider Attributes* page. For information about the fields on this page, see the [PLBC and Adhoc Attributes](#) section of this guide.

Enter information for all fields with an asterisk, and then select the “Submit” button.

Selecting the “Submit” button will return you to the *List of Corrections – Provider Attributes* page.

For the example correction below, Nordic Wonderland submitted incorrect provider prices for the month of January 2018.

### Step Three: Enter Correction Details

Screen Title: *Modify Correction – Provider Attributes*

After provider attributes are submitted, the *List of Corrections – Provider Attributes* screen shows the PLBC Provider request status as “Pending.” Now additional correction details need to be added. To add correction details, select the pencil icon.

Benefit Month	Error Source	Reasons	Requested Date	Status	Corrections	Icons
January 2018	Provider Error	Override Provider Price Type Error	11/12/2018	Pending		
March 2017	Agency Error	Youngstar Retroactive Positive Adjustment - Rating Error	03/22/2017	Processed	<a href="#">Accreditation/Star Level</a> <a href="#">Benefit Changes</a>	
February 2017	Provider Error	Youngstar Negative Adjustment Due To Rating Fraud	03/22/2017	Processed	<a href="#">Provider Prices</a> <a href="#">Benefit Changes</a>	
January 2017	Provider Error	Youngstar Negative Adjustment Due To Rating Fraud	01/10/2017	Calculated	<a href="#">Accreditation/Star Level</a> <a href="#">Benefit Changes</a>	
September 2016	Agency Error	Provider Price Error	10/20/2016	In Progress	<a href="#">Accreditation/Star Level</a> <a href="#">Authorization End</a>	

You will be taken to the *Modify Correction – Case Attributes* page, where they can modify the attributes and navigate to the appropriate correction pages. Select the appropriate correction link in the CSAW Menu based on the descriptions below. Multiple corrections can be added for the Provider PLBC request month but only one PLBC request can be in Pending, In Progress, or Calculated status at a time.

- **Accreditation/Star Level:** Department staff use this page to enter corrections to a provider’s out-of-state provider’s accreditation information or a provider’s YoungStar Star Level Rating.

This functionality is only accessible by Department staff. If you have to make an accreditation or Star Level correction, please contact the Department for assistance.

- If a YoungStar rating change is made to reduce the provider's rating, the YoungStar funds that were inappropriately issued to the center will be recovered from future YoungStar issuances as detailed in Chapter 4.11.1.2.1 and Chapter 4.11.1.2.2 of the [Wisconsin Shares Child Care Policy and Process Handbook](#).
- **Prices:** Use this page to enter corrections to a provider's prices.
- **Authorization End:** Use this page when all authorizations at a facility need to be ended on the same date. This is most commonly used in situations of provider closures.



### Accreditation/Star Level Corrections

Screen Title: *Star Level/Accreditation-Correction*

This functionality is only accessible by Department staff. If you have to make an accreditation or Star Level correction, please contact the Department for assistance.

### Price Corrections

Screen Title: *List of Correction Prices; Location Prices Correction*

Please review [Chapter 2 and Chapter 4 policy](#) prior to initiating a provider price correction. PLBC must be used for this correction when agencies delay on updating provider prices timely. If this results in a positive amount, these should be applied to the family so the funds are added to the parent's EBT card. Negative amounts should not be applied to the family, but to the provider.

The screen will display the provider prices for the correction month for both full and part-time rates, and for each age group. It will also display any price corrections already made for the benefit month to both full and part-time rates. To make a price correction, select the appropriate link:

- **New Full-Time Price:** Select this link when the provider's price for full-time care (21+ hours a week) needs to be corrected.
- **New Part-Time Price:** Select this link when the provider's price for part-time care (<21 hours a week) needs to be corrected.

**List of Correction Prices**

**Child Care Provider Location Details**

**Provider/Location#** 9800039909/001 **Months Open** Jan-Dec  
**Provider Name** Nordic Wonderland **Night Capacity** 0  
**Location Name** Nordic Wonderland **Day Capacity** 50  
**Phone #** (555) 555-5555 **Hours: MON-FRI** 6:00AM - 6:00PM  
**Address** 123 Modified Addrss Rd **SAT-SUN** Closed  
 Northwoods WI 45454

**Correction Request Details**

**Benefit Month** January 2018 **Correction Type** Provider Error  
**Reasons** Override Provider Price Type Error **Correction Status** Pending  
**Requested Date** 11/12/2018

**Existing Full-time Prices**

From Age	To Age	Price
0 Year(s) 0 Months(s)	12 Year(s) 11 Months(s)	\$250.00

**Corrected Full-time Prices**

From Age To Age Price

There are no full-time price corrections available

[New Full-time Price](#)

**Existing Part-time Prices**

From Age	To Age	Price
0 Year(s) 0 Months(s)	12 Year(s) 11 Months(s)	\$150.00

**Corrected Part-time Prices**

From Age To Age Price

There are no part-time price corrections available

[New Part-Time Price](#)

Clicking the New Full-Time Price link or the New Part-Time Price link will take you to the *Location Prices Correction* page. The fields on this page are the same for both Full-Time price corrections and Part-Time price corrections.

- **Type:** This field is set by the system according to which link you chose from the *List of Correction Prices* page
- **From Ages Year:** Enter the first year in the effective age range for the corrected price
- **From Ages Month:** Enter the number of months for the first year in the effective age range for the corrected price
- **To Ages Year:** Enter the last year in the effective age range for the corrected price
- **To Ages Month:** Enter the number of months for the last year in the effective age range for the corrected price
- **Charged Price:** Enter the provider’s correct price

Location Prices Correction			
<b>Child Care Provider Location Details</b>			
<b>Provider/Location#</b>	9800039909/001	<b>Months Open</b>	Jan-Dec
<b>Provider Name</b>	Nordic Wonderland	<b>Night Capacity</b>	0
<b>Location Name</b>	Nordic Wonderland	<b>Day Capacity</b>	50
<b>Phone #</b>	(555) 555-5555	<b>Hours: MON-FRI</b>	6:00AM - 6:00PM
<b>Address</b>	123 Modified Addrss Rd Northwoods WI 45454	<b>SAT-SUN</b>	Closed
<b>Correction Request Details</b>			
<b>Benefit Month</b>	January 2018	<b>Correction Type</b>	Provider Error
<b>Reasons</b>	Override Provider Price Type Error	<b>Correction Status</b>	Pending
<b>Requested Date</b>	11/12/2018		
<b>Add Location Prices Correction</b>			
<b>Type</b>	Full-time weekly		
<b>From Ages Year *</b>	0 Year	<b>From Ages Month *</b>	0 Month
<b>To Ages Year *</b>	1 Year	<b>To Ages Month *</b>	11 Months
<b>Charged Price *</b>	\$250.00		
<b>Comments</b>	Adding provider price change that the provider forgot to report		
	63 of 300 characters.		
	<input type="button" value="Add &gt;"/>		

**Note on Price Age Ranges**

The year from a child's birth to their first birthday is considered year zero and the birthday month is month zero. If the provider reports that their new price is for birth to 2 years of age, meaning that the price is effective starting in the child's birth month and ending on the month before the child's second birthday, the age range would be 0 years and 0 months to 1 years and 11 months. Select the "Add" button when the price correction is complete.

When you select the "Add" button, you will be returned to the *List of Correction Prices* page. At this point, you can either:

- Select another correction detail page link in the CSAW Navigation Menu: *Authorization End* or *Accreditation/Star Level* (for OCC users) ; or
- If no other corrections need to be made, the correction can be calculated by selecting the *Calculate* link.

**List of Correction Prices**

**Child Care Provider Location Details**

**Provider/Location#** 9800039909/001 **Months Open** Jan-Dec  
**Provider Name** Nordic Wonderland **Night Capacity** 0  
**Location Name** Nordic Wonderland **Day Capacity** 50  
**Phone #** (555) 555-5555 **Hours: MON-FRI** 6:00AM - 6:00PM  
**Address** 123 Modified Address Rd **SAT-SUN** Closed  
 Northwoods, WI 45454

**Correction Request Details**

Benefit Month	Reasons	Correction Type	Correction Status
	Provider Error	Provider Error	In Progress

**Existing Full-time Prices**

From Age	To Age	Price
0 Year(s) 0 Months(s)	12 Year(s) 11 Months(s)	\$250.00

**Corrected Full-time Price**

From Age	To Age	Price
0 Year(s) 0 Months(s)	1 Year(s) 11 Months(s)	\$250.00

**Existing Part-time Prices**

From Age	To Age	Price
0 Year(s) 0 Months(s)	12 Year(s) 11 Months(s)	\$150.00

**Corrected Part-time Prices**

There are no part-time price corrections available.

## Authorization End

Screen Title: *Authorization End - Correction*

On this page, you can invalidate all authorizations for the entire Benefit Month, or define a period of time when all authorizations were invalid.

- **Is this location invalid for this month?:** Switch this radio button to No if the provider was not eligible for Wisconsin Shares authorizations for the entire month.
- **Valid Until:** Enter a date in this field to define a period of time (less than the entire month) for which the provider was not eligible for Wisconsin Shares authorizations. For example, if the provider was overcapacity for three days in March 2018 (which has 31 days total), you would enter 3/28/18 as the Valid Until date. Note that this would be the Valid Until date no matter which three days were actually overcapacity; entering 3/28/2018 simply indicates to the system that the provider was invalid to receive authorizations for three days of March.
- **Authorization End Reason:** The only Authorization End Reason currently selectable is "Provider Category Ended." Choose "Provider Category Ended."

Authorization End - Correction			
<b>Child Care Provider Location Details</b>			
<b>Provider/Location#</b>	6800039986/001	<b>Months Open</b>	Jan-Dec
<b>Provider Name</b>	Nancy Thompson	<b>Night Capacity</b>	150
<b>Location Name</b>	Sweet Dreams Day And Night Care	<b>Day Capacity</b>	150
<b>Phone #</b>	(608) 422-6138	<b>Hours: MON-SUN</b>	12:00AM - 11:59PM
<b>Address</b>	109 Elm St Madison WI 537263819		
<b>Correction Request Details</b>			
<b>Benefit Month</b>	January 2018	<b>Correction Type</b>	Provider Error
<b>Reasons</b>	Violation Due To Overcapacity	<b>Correction Status</b>	Pending
<b>Requested Date</b>	04/02/2019		
<b>Authorization End - Correction</b>			
<b>Is this location invalid for this month?</b>	<input type="radio"/> Yes <input checked="" type="radio"/> No		
<b>Valid Until</b>	<input type="text"/> <input type="button" value="Calendar"/>		
<b>Authorization End Reason *</b>	<input type="text"/> <input type="button" value="Dropdown"/>		
<b>Comments</b>	<input type="text"/>		
	0 of 300 characters.		
	<input type="button" value="Add &gt;"/>		

When the correction is entered, select the “Add” button. This will return you to the *Modify Correction – Provider Attributes* page. At this point, you can either:

- Select another correction detail page link in the CSAW Navigation Menu: *Authorization End* or *Accreditation/Star Level* (for OCC users); or
- If no other corrections need to be made, the correction can be calculated by selecting the *Calculate* link.

### **Step Four: Calculate and Review**

#### **Calculate Benefit Adjustment**

Screen Title: *Calculate Correction – Provider Attributes*

Review the attributes information. If all correction information (Price Correction, Authorization End, etc) has been entered for the month, select the “Calculate Benefit” button. PLBC will use the attributes and corrections for that PLBC request to calculate a benefit adjustment.

**Calculate Correction - Provider Attributes**

**Child Care Provider Location Details**

<b>Provider/Location#</b>	9800039909/001	<b>Months Open</b>	Jan-Dec
<b>Provider Name</b>	Nordic Wonderland	<b>Night Capacity</b>	0
<b>Location Name</b>	Nordic Wonderland	<b>Day Capacity</b>	50
<b>Phone #</b>	(555) 555-5555	<b>Hours: MON-FRI</b>	6:00AM - 6:00PM
<b>Address</b>	123 Modified Addrsss Rd Northwoods WI 45454	<b>SAT-SUN</b>	Closed

**Calculate Correction - Provider Attributes**

<b>Benefit Month</b>	January 2018
<b>Status</b>	In Progress
<b>Error Source</b>	Provider Error
<b>Responsible Party Indicator</b>	Provider
<b>Reason</b>	Override Provider Price Type Error
<b>Secondary Reason</b>	
<b>Comments</b>	Provider provided incorrect prices for the month of January 2018.

**Calculate Benefit**

**Important:** If you calculate a PLBC request, but do not intend to Confirm it before the end of the day, reset the calculation (see the [Resetting the Calculation](#) section of this guide). This will return the PLBC request to In Progress status and ensure it does not impact a family’s subsidy amount prematurely.

### Review Benefit Adjustment

Screen Titles: *Calculation Correction and Confirm Benefit Changes By Provider; Calculation Details*  
 Calculating the PLBC request will bring you to the *Calculation Correction and Confirm Benefit Changes By Provider* page. This page will list all of the children who are impacted by the corrections, what their previous benefit was, what the current benefit is (the calculated amount based on the corrections entered for the PLBC request), and the Calculated Change (what the difference is between the two amounts).

After a PLBC request has been calculated for the provider, the following options are available:

- Review calculations for Previous Benefit total, Current Benefit total, or Calculated Change total information.
  - **Note:** Negative calculations are shown in parenthesis.
- Review the “Apply To” value to ensure it is correct. For information on “Apply To” functionality, how to determine if it is correct, and what to do if it is not, see the [PLBC “Apply To” Functionality](#) section.
- Select the *Reset Calculation* link to be able to modify corrections for the PLBC request.

**Important:** If the PLBC case also has a retro authorization in Completed or Calculated status for the same Benefit Month, PLBC will incorporate that authorization’s details in the PLBC calculation. Selecting the “Confirm Benefit” button will also confirm the authorization benefits. This is correct functionality and will allow the PLBC changes and retro authorization changes to occur on the same night. See the [PLBCs and Retro Authorizations on the Same Day](#) section of this guide for more information.

EBT CSAW Menu

- [Home](#)
- [Dashboard](#)
- [Assignments Search](#)
- [Inbox Search](#)
- EBT Case
- EBT Provider
- PLBC - Case
- PLBC - Provider
  - [Provider Search](#)
  - [Correction of Provider](#)
    - [Request - Add](#)
    - Request - Modify
    - Request - History
    - Request - Delete
    - [Calculate](#)
    - [Reset calculation](#)
    - [Benefit Changes](#)
    - Benefit Comparison
  - [Adhoc Provider Adjustments](#)
  - [Provider Overpayment Returns](#)
  - Case Overpayments
  - Provider Overpayments
  - Pending Authorizations

### Calculation Correction And Confirm Benefit Changes by Provider

**Child Care Provider Location Details**

<b>Provider/Location#</b> 6800039986/001	<b>Months Open</b> Jan-Dec
<b>Provider Name</b> Nancy [REDACTED]	<b>Night Capacity</b> 150
<b>Location Name</b> Sweet Dreams Day And Night Care	<b>Day Capacity</b> 150
<b>Phone #</b> (608) 422-6138	<b>Hours: MON-SUN</b> 12:00AM - 11:59PM
<b>Address</b> 109 Elm St Madison WI 537263819	

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**Correction Request Details**

<b>Benefit Month</b> November 2018	<b>Correction Type</b> Provider Error
<b>Reasons</b> Violation Due To Overcapacity	<b>Correction Status</b> Calculated
<b>Requested Date</b> 03/27/2019	

Click the Excel icon above to download the data in Excel format.

**Benefit Change Details**

Case Details	Child's Name	Date of Birth	Previous Benefit	Current Benefit	Calculated Change	Remaining Balance	
3150936535 1819 Aberg Ave Madison, WI 53704-4201 Dane County	Wesley [REDACTED]	01/12/2014	\$0.00	\$807.33	\$807.33	\$0.00	Apply To Family ▼
4150998647 1202 Aberg Ave Madison, WI 53714 Dane County	Tonya [REDACTED]	01/01/2011	\$241.92	\$227.17	(\$14.75)	\$241.92	Apply To Provider ▼

To view PLBC adjustment calculation details, select the "Calculated Change" amount link for the applicable child. For example, by selecting \$23.70 for Shomma, it will show the calculation details for the correction.

EBT CSAW Menu

- [Home](#)
- [Dashboard](#)
- [Assignments Search](#)
- [Inbox Search](#)
- EBT Case
- EBT Provider
- PLBC - Case
- PLBC - Provider
  - [Provider Search](#)
  - [Correction of Provider](#)
    - [Request - Add](#)
    - Request - Modify
    - Request - History
    - Request - Delete
    - [Calculate](#)
    - [Reset calculation](#)
    - [Benefit Changes](#)
    - Benefit Comparison
  - [Adhoc Provider Adjustments](#)
  - Case Overpayments
  - Provider Overpayments
  - Pending Authorizations

### Calculation Correction And Confirm Benefit Changes by Provider

**Child Care Provider Location Details**

<b>Provider/Location#</b> 9800039909/001	<b>Months Open</b> Jan-Dec
<b>Provider Name</b> Nordic Wonderland	<b>Night Capacity</b> 0
<b>Location Name</b> Nordic Wonderland	<b>Day Capacity</b> 50
<b>Phone #</b> (555) 555-5555	<b>Hours: MON-FRI</b> 6:00AM - 6:00PM
<b>Address</b> 123 Modified Addrss Rd Northwoods WI 45454	<b>SAT-SUN</b> Closed

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**Correction Request Details**

<b>Benefit Month</b> March 2017	<b>Correction Type</b> Agency Error
<b>Reasons</b> Youngstar Retroactive Positive Adjustment - Rating Error	<b>Correction Status</b> Processed
<b>Requested Date</b> 03/22/2017	

Click the Excel icon above to download the data in Excel format.

**Benefit Change Details**

Case Details	Child's Name	Date of Birth	Previous Benefit	Current Benefit	Calculated Change	Remaining Balance	
5150871052 1 W Wilson St, Po Box 7850 Monroe, WI 53707-7850 Monroe County	Jaisi [REDACTED]	12/13/2014	\$441.02	\$464.23	\$23.21	\$0.00	Apply To Family
6150859266 254 W Wells St Milwaukee, WI 53203-1806 Milwaukee County	Shomma [REDACTED]	08/23/2010	\$450.48	\$474.00	\$23.70	\$0.00	Apply To Family

For information on viewing and understanding the calculation details, see the [PLBC Calculations and Calculation Details](#) section of this guide.

**Step Five: Confirm**

If all details are correct, select the “Confirm Benefit” button.

<b>What happens to the Benefit Adjustment when You Confirm</b>			
<b>If Calculated Change is</b>	<b>And Apply To is</b>	<b>PLBC Will</b>	<b>Follow-up Actions Are</b>
Positive	Family or Provider	Apply the adjustment to the party indicated	None
Negative	Family or Provider	Not apply the adjustment directly	Enter the adjustment into Benefit Recovery (BV), and create BRITS referral if applicable
Positive or Negative	Not Apply	Not apply the adjustment	None

If a child’s subsidy amount is reduced due to a negative adjustment, the reduction in the corresponding YoungStar adjustment will be applied automatically to the provider’s next YoungStar bonus.

**Adhoc Adjustments**

The purpose of this section is to explain adhoc benefit adjustments in the CSAW module. Adhoc is used to make positive or negative adjustments to cases and providers when the adjustment cannot be calculated or applied appropriately using a PLBC request. The payment adjustment amounts are manually calculated and entered as an Adhoc Adjustment.

**Note:** Adhoc should be used in rare instances and agencies are expected to use a traditional PLBC request in most cases.

In order to make an Adhoc Adjustment, there must be processed benefits for at least one benefit month.

Case Adhoc Adjustments allow for positive adjustments to be added to the family’s EBT cards, even during periods when no eligibility existed. Negative adjustments may also be entered. However, these amounts are not deducted from the EBT card. These are manually referred to the Benefit Recovery (BV) System.

Provider Adhoc Adjustments allows adjustments to be made to any child that has an authorization at a certain child care provider. Provider Adhoc adjustments are used primarily to enter manually calculated provider overpayments related to specific client(s) of a center. This system is also used by the Bureau of Program Integrity (BPI) to process Voluntary Repayment Agreements (VPAs) in certain situations. It is very unlikely that a local agency would be required to complete a Provider Adhoc adjustment.

Adhoc adjustments can only be initiated and completed by CSAW users with the Coordinator or OCC security profile. Workers with “G” profile privilege will have view only.

### **Creating a New Adhoc Adjustment**

The basic steps to creating a new case-level PLBC Request are:

- Step One: Select “Add Adjustment”
- Step Two: Enter information into the *Add New Adjustment* page

#### **Step One: Select Add Adjustment**

Screen Title: *List of Adhoc Case Adjustments; List of Adhoc Provider Adjustments*

A new Adhoc Adjustment can be initiated by clicking *Add Adjustment* on the case or provider’s *List of Adhoc Adjustments* page. The *List of Adhoc Adjustments* page is reached by clicking *Correction of Case/Provider* in the left-hand navigation menu. For information about finding the *Correction of Case/Provider* link, which will bring you to the *List of Adhoc Adjustments* page, see the [Accessing PLBC and Adhoc](#) section of this guide.

If a case has processed payments within the current quarter, those will be displayed first. If an adjustment needs to be done for a past quarter, change the *Begin Date* field to the correct month. If processed payments exist for the case for the selected time frame, those will be displayed.

**List of Adhoc Case Adjustments**

**Case Details**

<b>Case Number</b>	1150988312	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Julie [REDACTED]	<b>RFA Date</b>	01/01/2018
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open

**Search**

**Begin Date** August 2018 **End Date** November 2018

**Adhoc Adjustments For The Period August 2018 - November 2018**

There are no adjustments for this case for this period

**Benefits For The Period August 2018 - November 2018**

Benefit Month	Child's Name	Pin Number	Provider Details	Provider Location Number	Benefit	
September 2018	Leo [REDACTED]	1585283738	Nordic Wonderland 123 Modified Addrss Rd, Northwoods, WI	9800039909-001	\$376.65	<a href="#">Add Adjustment</a>
September 2018	Tara [REDACTED]	1585289639	Nordic Wonderland 123 Modified Addrss Rd, Northwoods, WI	9800039909-001	\$376.65	<a href="#">Add Adjustment</a>
August 2018	Leo [REDACTED]	1585283738	Nordic Wonderland 123 Modified Addrss Rd, Northwoods, WI	9800039909-001	\$376.65	<a href="#">Add Adjustment</a>
August 2018	Tara [REDACTED]	1585289639	Nordic Wonderland 123 Modified Addrss Rd, Northwoods, WI	9800039909-001	\$376.65	<a href="#">Add Adjustment</a>

Click on the *Add Adjustment* link to create a new adjustment.

## Step Two: Enter Adjustment Information

Screen Title: *Add New Adjustment – Case; Add New Adjustment – Provider*

Selecting the *Add Adjustment* link on the *List of Adhoc Adjustments* page will bring you to the *Add New Adjustment – Case/Provider* page. Add the required details.

- Benefit Month: Choose the month the adjustment is for. The Adhoc month does not have to be the same as the benefit month.
- Type: Choose Positive or Negative as the type
- Amount: Enter the adjustment amount. This amount will need to be manually calculated. If the amount is negative, you will have to enter the amount with a – (minus) sign before it (e.g. “-75.00”).
- Apply Mode (for Case Adhoc Adjustments): This field defaults to Apply to Family. If the adjustment is positive, the funds are added to the EBT card.
- Category Type: Also known as the “Error Source.” See the descriptions of possible Error Source values in the [Error Source Field](#) section of this document.
- Reason: See the description of reason codes in the [Reason and Secondary Reason Code Fields](#) section of this [guide for more information on this field](#).

The screenshot shows a web form titled "Add New Adjustment For A Case". The form contains the following fields and values:

- Benefit Month \***: November 2018
- Type \***: Radio buttons for Positive and Negative, with Negative selected.
- Amount \***: (\$75.00)
- Apply Mode \***: Apply To Family
- Category Type \***: Client Error
- Reason \***: Authorization Error
- Secondary Reason**: (Empty)
- Comments**: (Empty text area)

A red callout box on the right side of the form points to the Amount field and contains the following text:

**This amount will need to be calculated manually.**  
**If you are making a negative adjustment, the amount will need to be entered as a negative number and will appear in parenthesis.**

At the bottom of the form is an "Add >" button.

Clicking the “Add” button at the bottom of the screen will take you back to the *List of Adhoc Adjustments* page.

For Case Adhoc Adjustments, clicking the “Add” button will place the adhoc in “Confirmed by Worker” status. For Provider Adhoc Adjustments, clicking the “Add” button will place the adhoc in “Ready To Refer To Benefit Recovery,” even if the adhoc amount is positive.

The Adhoc Status is now considered to be confirmed. If the adjustment is positive, it will be loaded to the family’s EBT card overnight. Negative amounts are not reduced from the amounts on the EBT card, but added to an overpayment table so they can be referred to Benefit Recovery (BV).

### **Modifying or Deleting an Adhoc Adjustment**

Screen Title: *List of Adhoc Case Adjustments; List of Adhoc Provider Adjustments*

While in “Confirmed by Worker” or “Ready To Refer To Benefit Recovery” status, the adjustment can be modified by selecting the pencil icon, or deleted by selecting the trash can icon. After the request is in *Processed* status, it cannot be changed.

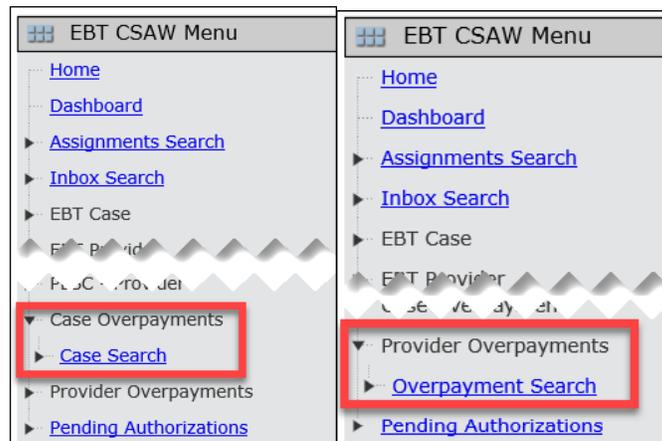
Adhoc Adjustments For The Period January 2019 - April 2019							
Benefit Month	Child's Name	Pin Number	Provider Location Details	Benefit	Status		
April 2019	Alan Zaveri-Test	7585326564	6800039986-001 Sweet Dreams Day And Night Care 109 Elm St, Madison, WI	\$150.00	Confirmed By Worker	Apply To Family	

### **Adhocs and Overpayments**

Screen Titles: *Case Adjustment Search; Provider Overpayments and Adjustments*

If a negative Adhoc adjustment is made, the details of the adjustment will appear on the Case Overpayment or Provider Overpayment screen.

The Case or Provider Overpayment page can be found by expanding the *Case/Provider Overpayments* section of the left-hand CSAW Menu, then selecting the *Case/Provider Search* link.



If a negative Case Adhoc Adjustment was created and incorrectly coded as “Apply to Family” rather than “Apply to Provider,” you can select the *Transfer to Provider* link on the right side of the screen for the adjustment that was made in error. The adjustment will transfer to the *Provider Overpayments* page.

**Case Adjustment Search**

**Search**

County ▼

Adjustment From Date

Adjustment To Date

Status ▼

Case Number

Search

You can search for the case number from this screen and edit the "Adjustment From Date" and/or the "Adjustment To Date" to narrow your search results.

**Case Adjustment Results**

Case Number	Primary Person	Child's Name	Provider Location Details	Amount	Remaining Balance	Status	
1150988312	Julie [REDACTED]	Leo [REDACTED]	9800039909-001 Nordic Wonderland 123 Modified Addrsss Rd, Northwoods, WI 45454	(\$75.00)	(\$75.00)	Ready To Refer To Benefit Recovery	<a href="#" style="border: 1px solid red; padding: 2px;">Transfer To Provider</a>
1150988312	Julie [REDACTED]	Leo [REDACTED]	9800039909-001 Nordic Wonderland 123 Modified Addrsss Rd, Northwoods, WI 45454	(\$44.55)	(\$44.55)	Ready To Refer To Benefit Recovery	<a href="#">Transfer To Provider</a>
1150988312	Julie [REDACTED]	Leo [REDACTED]	9800039909-001 Nordic Wonderland 123 Modified Addrsss Rd, Northwoods, WI 45454	(\$48.60)	(\$48.60)	Ready To Refer To Benefit Recovery	<a href="#">Transfer To Provider</a>

## Glossary of Terms

**Adhoc** – A module within PLBC. Adhoc can be used when a regular PLBC request cannot accurately calculate an adjustment. It relies on the worker to manually calculate the adjustment.

**Adhoc Adjustment** – An individual adhoc record

**Attributes** – The basic details for any correction: Benefit Month, Error Source or Category Type, Responsible Party, and Reason.

**Adjustment** – Sometimes also called “Benefit Change” or “Calculated Change,” it is a change to the previously applied subsidy amount. You can have either a positive or negative adjustment. An adjustment may be the result of calculating a PLBC request, or you can enter direct changes to the subsidy amount as an Adhoc Adjustment.

**Apply To** – A value which tells PLBC what to do with an adjustment amount. This value is automatically assigned based on the adjustment type (positive or negative) and the Reason Code which was entered on the Attributes page for that PLBC request. Only OCC (Office of Child Care) workers can change the Apply To value.

**Benefit Month** – The month(s) in which incorrect/incomplete details resulted in an incorrect/incomplete subsidy amount

**Benefit Recovery** – A subsystem of CARES in which client overpayment information is entered. Once the overpayment information is entered into Benefit Recovery, the overpayment amounts will start to be collected from the liable individual.

**BRITS** – The Benefit Recovery Investigation Tracking System is a web based fraud referral and investigation system that houses all client referrals related to the Wisconsin Shares program.

**Correction Detail** – The change made by the worker to case or provider information. For instance, if a worker enters an income change and an authorization change into a PLBC record, the new income information and the new authorization information are both corrections.

**Offset** – PLBC functionality which allows the worker to reduce a negative adjustment when there is a smaller positive adjustment. The positive amount is zeroed out and that amount is subtracted from the larger negative adjustment.

**Overpayment** – Sanction issued to either a provider or client participating in the Wisconsin Shares program when either party received subsidy funds which they were not eligible to receive and are now responsible to return those funds.

**PLBC** (aka “Post-Load Benefit Correction”) – A module within CSAW that allows corrections to subsidy funds which have already been issued. This term is used to refer to the entire Post-Load Benefit Correction module, including Adhoc.

**PLBC Request** – An individual PLBC record

**Retraction** – Process where funds that were inappropriately issued to a client participating in the Wisconsin Shares Program are recovered from the client's EBT Card

**VPA (aka "Voluntary Repayment Agreement")** – Process where funds that were inappropriately paid to a provider participating in the Wisconsin Shares program are recovered from the provider

## Appendix A: CCDBG Phase 3 Changes to PLBC

### **Background**

Wisconsin Shares' CCDBG Phase 3 project was implemented November 1, 2018. It included changes to Wisconsin Shares calculations (see Operations Memo [18-26](#)) and copayments (see Operations Memo [18-25](#)). Changes to the calculations and copayments are mirrored in PLBC to ensure that the system is able to correctly calculate adjustments. In addition, the creation of Copayment Periods required the creation of a new PLBC adjustment reason code.

Wisconsin Shares started using new logic to calculate an Assistance Group's (AG's) subsidy amount and copayment on November 1, 2018. In order to support the CCDBG goal of "continuity of care," Wisconsin Shares made automation changes to protect an AG's subsidy amount from decreasing due to certain reasons (see Operations Memo [18-26](#)). Additionally, Wisconsin Shares now uses a "Copayment (Copay) per Hour" method, rather than the previous "Base Plus Per Child" method (see Operations Memo [18-25](#)). Another change is that the Wisconsin Shares system now places AGs into one of three Copayment Periods (see Operations Memo [18-25](#)).

During the three Copayment Periods (Stabilization, Gradual Phase Out, and Exit), there are rules that determine whether a copay can increase and by how much (see Operations Memo [18-25](#)). AGs are placed into a copay period at initial application and renewal according to their percentage of the Federal Poverty Level (FPL) at that time. If their FPL increases, they can only move "up" to a higher copay period at their next renewal (e.g., from Stabilization to Exit). If an AG's FPL decreases, they can move "down" into a lower copay period (e.g., from Exit to Gradual Phase Out, etc.) at any time, regardless of whether or not they are doing a renewal. The creation of Copayment Periods means that a change to an AG's FPL in one month can affect how the copay is calculated in future months (see the *New Concept: A Change in FPL for One Month can Affect Subsidy for Following Months* of this guide).

**Note:** CSAW calculates an AG's Federal Poverty Level (FPL) percentage using both the AG size and the AG's income. A change in either the AG size or income can result in a change to the FPL.

### **Automation Changes – November 2018**

#### **CCDBG Phase 3 Calculations**

PLBC has been enhanced to use the new subsidy and copay calculation rules when calculating adjustments for November 1, 2018, and onward (see Operations Memos [18-26](#) and [18-25](#)). PLBC will continue to use pre-Phase-3 logic when calculating adjustments for months prior to November 2018.

#### **Automatic Application of Corrected FPL to Future Calculations**

When an Income/AG correction is processed and the FPL change affects the AG's copay for following months, CSAW will automatically consider this change for any new subsidy calculations: future months and new authorizations for months following the FPL change will automatically calculate correctly, but CSAW will not automatically recalculate monthly subsidy amounts that are in Processed status. A

subsidy amount moves to Processed status when the amount is loaded to the parent’s MyWICChildCare account. For more information how a change to one month can affect the subsidy calculations for following months, see the [New Concept: A Change in FPL for One Month can Affect Subsidy for Following Months](#) of this guide.

**Income/AG Correction Soft-Stop Validation**

A new soft-stop validation has been added when workers calculate an Income/AG correction. This soft-stop will remind workers that a correction to the income and/or AG size for one month can affect the subsidy amounts for following months.

**“Prior Income/AG Error – Copayment” Reason Code**

The creation of Copayment Periods means that a change to an AG’s FPL in one month can affect how the copay is calculated in following months. Due to this change, a new reason code has been added: Prior Income/AG Error – Copayment. For information on using the “Prior Income/AG Error – Copayment” reason code, see the [If Reason Code is “Prior Income/AG Error – Copayment”](#) section of this guide. For information how a change to one month can affect the subsidy calculations for following months, see the [New Concept: A Change in FPL for One Month can Affect Subsidy for Following Months](#) of this guide.

**Income/AG Screen for “Prior Income/AG Error – Copayment” Reason Code**

When the worker creates a PLBC request and chooses the “Prior Income/AG Error – Copayment” reason code, the Income/AG Size screen for that PLBC will be slightly different from Income/AG Size screen for other reason codes. It will contain a new field and some new text to emphasize that the Income/AG correction is for a *prior* month. The worker must specify the month in which the Income/AG changed by using the new “Determination Month” field (see screenshot below). For more information on using the “Prior Income/AG Error – Copayment” reason code, see the [If Reason Code is “Prior Income/AG Error – Copayment”](#) section of this guide.

Income/AG Size - Correction			
<b>Case Details</b>			
<b>Case Number</b>	9150987496	<b>Admin Agency</b>	Dane County (13)
<b>Primary Person</b>	Michael Bluth	<b>RFA Date</b>	11/01/2017
<b>Address</b>	1202 Aberg Ave Madison, WI 53714 Dane County	<b>Review Date</b>	12/31/2018
		<b>CC AG Status</b>	Open
<b>Correction Request Details</b>			
<b>Benefit Month</b>	January 2018	<b>Correction Type</b>	System Error
<b>Reasons</b>	Prior Income/Ag Error - Copayment	<b>Correction Status</b>	Pending
<b>Requested Date</b>	11/19/2018		
<b>Case Information Correction for Prior Month</b>			
<b>Determination Month</b>	January 2018		
<b>Income Amount for Determination Month *</b>	\$2099.20	(\$2,099.20)	
<b>Eligible Members for Determination Month *</b>	2	(2)	
<b>Comments</b>	<input type="text"/>		
	0 of 300 characters.		
	Add >		

### Sequential Calculation Hard-Stop Validation

Because a correction to one month can affect the subsidy calculations for subsequent months, workers must calculate PLBC requests in sequential order. For example, if an income decrease occurred in March and it is now May, you must enter corrections for March, April, and May. These corrections must be calculated in chronological order: first March, then April, then May. A new hard-stop validation has been added to stop workers from calculating out of order.

**The following error has occurred**

✘ PLBC corrections must be calculated in sequential order according to the calendar: earlier months must be calculated before later months. Reset calculations for the following month(s), then calculate the PLBC corrections in sequential order: December 2017.

### New Calculations on Benefit Comparison Screen

Workers will be able to see all of the new calculation details, including the copay period and capped FPL, on the PLBC Benefit Comparison Screen. For more information on the Benefit Comparison Screen, see the [PLBC Calculations and Calculation Details](#) section of this guide.

Benefit Comparison		
	Previous	New
<b>Month</b>	May 2018	May 2018
<b>Eligible Members</b>	2	2
<b>Actual Income</b>	\$2,610.00	\$2,200.00
<b>Actual FPL</b>	190	160
<b>Copayment Period</b>	Gradual Phase Out	Stabilization
<b>Capped FPL</b>	190	160
<b>Hourly Rate for FPL</b>	\$2.14	\$1.79
<b>Total Hours for Copay</b>	131	131
<b>Exit Copay</b>	\$0.00	\$0.00
<b>Family Copay</b>	\$280.34	\$234.49