CSAW
Post-Load Benefit Correction (PLBC)
User Guide

December 3, 2018

Division of Early Care and Education
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Background Information on the PLBC Module

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 changes that need to be made to a case after the rollout of MyWIChildCare. 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’ MyWIChildCare 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 corrections are needed when funds for either a prior or current month needs to be adjusted. For example, if a parent needs to increase their child’s authorization for this month after funds were already loaded to the parent’s EBT card, a post load 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 MyWIChildCare account, except in situations where a retraction request has been submitted and processed for a case.

When to Use PLBC

PLBC should be used in numerous scenarios to add positive adjustments and calculate negative adjustments. 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, retraction requests, voluntary repayment agreements, or intentional program violations)

PLBC is only used for adjustments to current or past month subsidy amount that have been loaded to the MyWIChildCare account and in which the funds are in a processed status. If the change(s) affect future subsidy amount, the authorization must be adjusted timely in CSAW.

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 correction creates a negative adjustment and it’s determined an overpayment per policy, that overpayment amount must be entered into the Benefit Recovery (BV). To create a claim in BV, the worker 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

Client and provider PLBC corrections that result in positive adjustments will be added to the client’s MyWIChildCare EBT card automatically the following business day after confirming a PLBC correction (this excludes YoungStar Rating increases for providers, however).

**PLBC Security Privileges**

The tables below describe the security privileges in PLBC for Client and Provider corrections. Workers must have Profile G (the Worker profile) to access PLBC. Profile G will still 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.

### Client

<table>
<thead>
<tr>
<th>Profile</th>
<th>Privilege Level</th>
<th>Ad Hoc</th>
<th>PLBC Correction</th>
<th>“Apply To” Override</th>
<th>Card Return</th>
<th>Offset</th>
<th>Over Payment (OP)</th>
<th>Refer OP to BV</th>
<th>Transfer OP To Provider</th>
</tr>
</thead>
<tbody>
<tr>
<td>Worker</td>
<td>View</td>
<td>X</td>
<td>X</td>
<td>-</td>
<td>X</td>
<td>-</td>
<td>-</td>
<td>-</td>
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<tr>
<td></td>
<td>Update</td>
<td>-</td>
<td>X</td>
<td></td>
<td></td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>Coordinator</td>
<td>View</td>
<td>X</td>
<td>X</td>
<td>-</td>
<td>X</td>
<td>X</td>
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<td>-</td>
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<tr>
<td></td>
<td>Update</td>
<td>X</td>
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<td>-</td>
<td>X</td>
<td>-</td>
<td>-</td>
<td>-</td>
<td>-</td>
</tr>
<tr>
<td>OCC</td>
<td>View</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
<tr>
<td></td>
<td>Update</td>
<td>X</td>
<td>X</td>
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<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
<td>X</td>
</tr>
</tbody>
</table>
Accessing CSAW - PLBC

To access the CSAW - PLBC module, click on the CSAW tab in the top navigation bar.

Creating a New CSAW - PLBC Client Adjustment Request

Conduct a search on the “Case Search” screen using the client’s case number, name, social security number, or PIN.

Case Summary Screen

After searching the case, the client’s “Case Summary” screen displays. In the left side navigation menu, select the arrow next to PLBC - Case to expand the sub menu. This will display links to Case Search, Correction of Case, Ad hoc Case Adjustment, and Benefit Return for the Case PLBC Module.

PLBC - Correction of Cases can only be done for authorizations that are in “Processed” status and for months where the client’s EBT card has been loaded (typically current or past month).
NOTE: For all of the client case examples, Julie will be the example client used.

**Left-Side Navigation Menu - PLBC**

The *Case Search* link can be used to search for a different client’s case than the case that was initially entered.

In this example, the correct case **number** for the Case PLBC Adjustment was entered; therefore this step can be skipped.
The *Correction of Case* link can be used to initiate the PLBC adjustment request for a client’s case. You can also select this link to view all PLBC corrections that have been created for the case (“List of Corrections - Case Attributes” page).

The *Adhoc Case Adjustments* link can be used to make adjustments to a case’s subsidy amounts without creating an adjustment in the “Correction of Case” screen.

Ad Hoc functionality can be used when PLBC is unable to accurately calculate a positive adjustment or negative adjustment. When using the Ad Hoc functionality, the worker 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.

Client Ad Hoc Adjustments may be made for the following reasons (but not limited to):

- 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, Ad Hoc 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.

Any positive client ad hoc adjustments will load to the EBT card overnight. If a negative adjustment should be applied according to policy, the negative adjustment must be entered in to the Benefit Recovery system.
List of Corrections - Case Attributes

This page is reached by clicking Correction of Case in the left-hand navigation menu. It displays any initiated PLBC corrections requests. This includes information on the Benefit Month, Error Source, Reasons, Requested Date, Status, Correction, and Benefits Changes.

Select the New Correction link to initiate a new request.

PLBC only allows one correction record 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 your corrections. Once the correction is listed as processed, a new one can be entered for the same month.

New Correction - Case Attributes

This page is reached by clicking the New Correction link at the bottom of the “List of Corrections - Case Attributes” page. See the following sections for information about the fields on this page.

New Correction - Case Attributes - Benefit Month

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

NOTE: PLBC displays the timeframe of processed subsidy (benefit) months and years. PLBC adjustment requests cannot be initiated to months prior or after this displayed timeframe.

Example: In the screenshot below, a PLBC adjustment 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 adjustments can only be added for any months between January and September 2018 as shown in the below screenshot.

New Correction - Case Attributes

<table>
<thead>
<tr>
<th>Case Details</th>
<th>Admin Agency</th>
<th>Case Number</th>
<th>Dane County (15)</th>
<th>Primary Person</th>
<th>1150988312</th>
<th>Address</th>
<th>1202 Aberg Ave Madison, WI 53714 Dane County</th>
</tr>
</thead>
<tbody>
<tr>
<td>Error Source</td>
<td>Responsible Party Indicator</td>
<td>Reason</td>
<td>Secondary Reason</td>
<td>Comments</td>
<td>0 of 500 characters.</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**New Correction - Case Attributes - Error Source**

Select the appropriate *Error Source* based on the descriptions below.

- **Agency Error**: Choose this when an agency incorrectly processed eligibility or an authorization.
- **Agency Worker Fraud – IPV**: Choose this when an agency worker has purposely and deliberately violated the program rules
- **Client Error**: Choose this when an error was caused by the client.
  - o **Example**: Untimely reporting of changes that effect eligibility or authorizations.
- **Client Fraud – IPV**: Choose this when a client has purposely and deliberately violated the program rules.
- **Collusion**: Choose this 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 when an error was cause by a provider
- **Provider Fraud – IPV**: Choose this when a provider has purposely and deliberately violated the program rules.
- **System Error**: Choose this 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 - Responsible Party Indicator

Select the appropriate Responsible Party Indicator based on the descriptions below. This indicator identifies the party the adjustments should be applied to.

- **Client**: Choose this when a client is liable for the adjustment.
- **DCF**: Choose this when the Department determines self-liability. This is in cases of agency error.
- **Provider**: Choose this when a provider is liable for the adjustment.
- **Provider and Client**: Choose this when clients and providers are liable for adjustments. This reason code must be used exclusively in cases of collusion.
New Correction - Case Attributes - Reason and Secondary Reason Codes

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 when authorization information needs to be updated (Begin and End dates, Schedule Type, School Closed Hours, Inclement Weather Hours, or Rate Type).
- **Authorized to Wrong Provider**: Choose this when an authorization was made to the incorrect provider or provider location.
- **Correction to PLBC Subsidy Adjustment**: Choose this when a PLBC correction has already been made for the month and is in processed status, and a second PLBC correction needs to be made to correct the previous correction, or alter a correction due to a remand by an Administrative Law Judge (ALJ).
- **Eligibility Error**: Choose this when eligibility information needs to be updated (child date of birth [DOB], copay type, income, AG [Assistance Group] size, or 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 below.
- **Out-Of-State Provider Accreditation Error**: Choose this when a provider from out of state was inaccurately accredited.
- **Override Provider Price Type Error**: Choose this when the incorrect provider price type was entered.
- **Prior Income/AG Error – Copayment**: Choose this 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 below.
- **Provider Price Error**: Choose this when an incorrect provider price was entered.
- **Violation - Provider Authorizing Payments Directly To Themselves**: Choose this when a provider was inappropriately authorized to care for their child(ren) at their own center.
- **Violation Due To Overcapacity**: Choose this when making an adjustment based on a provider overcapacity violation.
- **Youngstar Negative Adjustment Due To Rating Fraud**: Choose this when a provider inaccurately reported information in order to fraudulently increase their Youngstar rating.
- **Youngstar Retroactive Positive Adjustment Rating Error**: Choose this 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 PLBC – Updated 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 in a situation where a correction adjustment request would need to be added for a case’s eligibility and
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 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.

<table>
<thead>
<tr>
<th>Copay Period</th>
<th>Capped FPL?</th>
<th>Effect on Future Months</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stabilization (0-189% FPL)</td>
<td>Yes. Capped FPL is set as the lowest FPL in the family’s eligibility period so far.</td>
<td>A decrease in income can set a new, lower Capped FPL for following months</td>
</tr>
<tr>
<td>Gradual Phase Out (190-199% FPL)</td>
<td>Maybe. If the current month’s FPL is above 200% FPL, the Capped FPL for the current month will be 200% FPL.</td>
<td>A decrease to below 190% FPL will move the family to the Stabilization period</td>
</tr>
</tbody>
</table>
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. Due to an error, the system does not consider the new, decreased income. 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. Due to an error, the May decrease is not accounted for in the system, 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 correction 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 correction for June, too. The worker must use the “Prior Income/AG Error – Copayment” Reason Code for the June correction. 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 an error occurs 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 corrections 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 corrections for August and September using the “Prior Income/AG Error – Copayment” Reason Code.

**New Correction - Case Attributes - Comments**

In this field, enter comments that document the justification for the PLBC adjustment.

Select *Submit* when the appropriate fields on the “New Correction - Case Attributes” page are completed.

**NOTE:** If the PLBC 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.

**List of Corrections - Case Attributes - Status and Add Corrections**

After Case Attributes are submitted, the “List of Corrections - Case Attributes” screen shows the PLBC Case adjustment request status as *Pending*. Now, additional correction information needs to be added. To add correction information, select the pencil icon that corresponds to the initiated PLBC correction month.
Modify Correction - Case Attributes

Select the corresponding correction link from the left side CSAW Menu based on the descriptions below. Multiple corrections can be added for a month to the correction request, but only one correction request can be in pending, in progress, or calculated status at a time.

- **Income/AG**: Use this when income or child care assistance group size information needs to be corrected.
- **Eligibility/Copay/DOB**: Use this when eligibility, copay type, or date of birth (DOB) needs to be corrected.
- **Authorizations**: Use this when the following authorization information needs to be corrected:
  - Authorization is invalid for a month
  - Begin and end dates
  - Schedule Type (Single, Two/Four Weeks)
  - Regular School Closed Hours
  - Inclement Weather School Closure Hours
  - Rate Type
Income/AG Size Correction

Income/AG information from CARES Worker Web (CWW) is used each month in the subsidy (benefit) calculations.

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 the worker entered a Reason Code of Prior Income/AG Error – Copayment on the Case Attributes page.

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 the worker calculates an Income/AG Size correction, a soft-stop validation will remind workers 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 of this guide.

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 of this guide.

⚠️ 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.
Months 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.”

- **Determination Month**: Enter the month for which the income and/or AG size was incorrect.
  - If the worker enters 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).

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**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. Due to an error, the system does not change Dia’s May income to 160% FPL.
The error is discovered in late June. The worker creates a PLBC correction for May using the Eligibility Error reason code, and corrects the May income. The worker then creates a PLBC correction using the “Prior Income/AG Error – Copayment” Reason Code for June.

For the June correction, 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%.

Modify Correction - Case Attributes
At this time, the worker may:

- Add another Correction to the Case (if needed);

  OR

- If no other corrections need to be made, the correction can be calculated by selecting the Calculate link.
**Eligibility/Copay/DOB Correction**

Select the link **for the child(ren)** in which a correction to eligibility, copay, or date of birth needs to be made.

The “Eligibility/Copay/DOB – Correction” page will load. On this page you may either:

- Select the no radio button for the **Eligibility Switch** if the child should not have been eligible for the month.

  And/Or

- Update the date of birth/copay type fields and select **Add**. This will return you to the “Eligibility/Copay/DOB – Correction” page. If changing the copay type, please see the **Note** below.

<table>
<thead>
<tr>
<th>Case Details</th>
<th>Admin Agency</th>
<th>Admin Agency</th>
</tr>
</thead>
<tbody>
<tr>
<td>Case Number</td>
<td>1150998312</td>
<td>Dane County (13)</td>
</tr>
<tr>
<td>Primary Person</td>
<td>Julia</td>
<td>RFA Date</td>
</tr>
<tr>
<td>Address</td>
<td>1202 Aberg Ave</td>
<td>01/01/2018</td>
</tr>
<tr>
<td></td>
<td>Madison, WI 53714</td>
<td>Review Date</td>
</tr>
<tr>
<td></td>
<td>Dane County</td>
<td>12/31/2018</td>
</tr>
<tr>
<td></td>
<td>Open</td>
<td>CC AG Status</td>
</tr>
</tbody>
</table>

**Correction Request Details**

<table>
<thead>
<tr>
<th>Benefit Month</th>
<th>Correction Type</th>
<th>Correction Status</th>
</tr>
</thead>
<tbody>
<tr>
<td>January 2018</td>
<td>Client Error</td>
<td>In Progress</td>
</tr>
</tbody>
</table>

**Reasons**

- Eligibility Error, Authorization Error

**Requested Date**

- 10/18/2018

**Children with benefit in January, 2018**

<table>
<thead>
<tr>
<th>Child’s Name</th>
<th>Pin</th>
<th>Date of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leo Frederick</td>
<td>1585283738</td>
<td>01/01/2015</td>
</tr>
</tbody>
</table>

- Indicates that corrections details exist.
Select *Add* after all correction details have been entered on this screen. After an eligibility/copay/DOB correction has been entered for a child, a yellow triangle with an exclamation point will appear next to their name on this page.

The following options are then available:

- Make Eligibility/Copay/DOB corrections to other applicable children on the case by selecting the child’s name link.
  
  OR

- Select another correction type link 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 adjustment request.

**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.
Authorization Correction List

Select the link for the child(ren) in which a correction to an authorization needs to be made.

Authorization Correction

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.
- **Begin Date**: Use this when the begin date of the authorization needs to be corrected.
- **End Date**: Use this when the end date of the authorized month needs to be corrected.

When using PLBC to calculate a partial overpayment for a month, enter the dates the authorization should have been in these fields - NOT the overpayment period dates.

- **Schedule Type**: Use this 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, so 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 will have to manually calculate the corrected amount of weekly hours that will need to 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.

- **Regular School Closed Hours**: Use this when hours for scheduled school closures needs to be corrected.
- **Inclement Weather School Closure Hours**: Use this when hours for inclement weather need to be corrected.
- **Rate Type**: Use this 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.
  
  o **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 to explain further details as to why the PLBC - Authorization Correction is being initiated.

**NOTE**: The following fields cannot be modified because these are system updates that are generated automatically with any changes performed in the Schedule Type Hours field.

- **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.
Adding or Deleting Average Weekly Hours

When the average weekly authorized hours need to be adjusted in the current month, begin and end dates for the authorization period must remain the same. To add or subtract hours for one week for the month:

- Adjust the Schedule Type to Two/Four Weeks (if necessary), and
- Override the hours/minutes for the applicable week(s).

For example, Julie worked an extra 10 hours in week 3 and in week 4 in the month of January 2018, which was reported timely.

Select the Schedule Type Two/Four Weeks
Override week two to **21:15 hours** and then override week 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.

If, instead, Julie reported untimely that her child care need dropped from **21:15 hours** per week to **11:15 hours** for week three and four in January, then select the Schedule Type Two/Four Weeks again.
Override week two to **21:15 hours** and then override week 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.

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

When the school closed hours need to be adjusted in the current month, do not change begin and end dates for the authorization period. To add or subtract hours for the month:

Override the Scheduled School Closed Hours for the month by adding or subtracting from the hours that are already listed.

For example, **Julie** reported timely that she needs 16 school closed hours for the month of **January** for time when her son **Leo** is on spring 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.
Another example is Julie reported timely that she needed 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. She has weekly average hours of 7.5 for her five days of work. That equals 1.5 hours per day, which includes travel. She 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 hours need to be added to the 4 hours already listed for the month (7.5 + 4 = 11.5; this is rounded up. The system will not allow you to enter a decimal in this field.

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

Most often, the authorization begin or end dates will not be changed for a PLBC - Authorization correction for the authorized hours. However, there are instances where begin and end dates may need to be changed.

For example, Julie’s RFA date was 1/1/2018 and, therefore, an authorization was written starting 1/1/2018. It was discovered that the child did not start attending the child care until 1/15/2018, therefore the begin date was incorrect for the authorization for the month of January.

To correct the begin date, select the calendar icon or enter the corrected date as shown in the example below.

<table>
<thead>
<tr>
<th>Child's Name</th>
<th>Date of Birth</th>
<th>Effective Authorization Period</th>
<th>Average Weekly Hours</th>
<th>Average Weekly Full Time Hours</th>
<th>Average Weekly Above Full Time Hours</th>
<th>Provider Location Details</th>
</tr>
</thead>
<tbody>
<tr>
<td>Leo</td>
<td>01/01/2015</td>
<td>01/01/2018 - 01/31/2018</td>
<td>21:15</td>
<td>21:15</td>
<td>09:00</td>
<td>Nordic Wonderland</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>123 Modified Address Rd,</td>
</tr>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td>Northborough, WI 45454</td>
</tr>
</tbody>
</table>

**Authorization Correction**

Is this authorization Invalid for this month?  Yes  No

Begin Date * 01/15/2018 (01/01/2018)
End Date * 01/31/2018 (01/31/2018)

Schedule Type
- Single Week
- Two/Four Weeks

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)

When changing begin and/or end dates of an Authorization Correction, PLBC will calculate benefits for only the period entered instead of the original authorization dates.

**Authorization Correction List - Correction**

After an authorization correction has been made for a child, a yellow triangle with an exclamation point will appear next to their name to indicate that a change 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 type 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 adjustment request.

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

A PLBC cannot be calculated if the subsidy amount for a retro-authorization is in Confirmed status. This happens when a retro authorization has been calculated, but is not Processed yet. A validation will prevent workers from calculating PLBC corrections when a retro authorization is in Confirmed status for the same case.

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

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

- Review calculations for Previous Benefit, Current Benefit, or Calculated Change information by selecting amount links. For example, by selecting $186.93 for Leo, it will show how the change was calculated.
  
  **NOTE:** Negative adjustment calculations are in parenthesis.

- Select *Reset Calculation* 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*.

- 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 (see **Note** below).

**Note:** It is the workers responsibility to ensure that the “Apply To” field is correct before confirming the PLBC correction. 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
• Select Confirm Benefit to apply the positive amounts to the Parent’s MyWIChildCare account or select confirm to acknowledge negative amounts will be entered into Benefit Recovery (BV), and a BRITS referral created, if applicable.

**Calculation Details for Calculated Change Link**

To view calculations done for Calculation Change, select the Calculated Change Amount link for the applicable child.

The screenshot below shows the calculated change for the authorization below. 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 pink, as shown in the screenshot below.
### Calculation Details

#### Case Details

<table>
<thead>
<tr>
<th>Previous</th>
<th>New</th>
</tr>
</thead>
<tbody>
<tr>
<td>Capped FPL</td>
<td>65</td>
</tr>
<tr>
<td>Family Copay</td>
<td>$13.95</td>
</tr>
<tr>
<td>Child's Name</td>
<td>Leo</td>
</tr>
<tr>
<td>Date of Birth</td>
<td>01/01/15</td>
</tr>
<tr>
<td>Provider Location</td>
<td>9800039909-001 9800039909-001</td>
</tr>
<tr>
<td>Status</td>
<td>Processed</td>
</tr>
<tr>
<td>Authorized Hours</td>
<td>03</td>
</tr>
<tr>
<td>Regular Subsidy Hours</td>
<td>03</td>
</tr>
<tr>
<td>Provider Price Type</td>
<td>Full-time</td>
</tr>
<tr>
<td>Monthly Hourly Rate</td>
<td>$4.20</td>
</tr>
<tr>
<td>Capped Subsidy</td>
<td>$390.60</td>
</tr>
<tr>
<td>Total Copay</td>
<td>($13.95)</td>
</tr>
<tr>
<td>Subtotal</td>
<td>$376.65</td>
</tr>
<tr>
<td>Above Full Time Subsidy</td>
<td>$0.00</td>
</tr>
<tr>
<td>Subtotal</td>
<td>$376.65</td>
</tr>
<tr>
<td>YoungStar Adjustment</td>
<td>$0.00</td>
</tr>
<tr>
<td>Subsidy Amount</td>
<td>$376.65</td>
</tr>
<tr>
<td>Calculated Change</td>
<td>($186.93)</td>
</tr>
</tbody>
</table>

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.

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.
To see further calculation details for the previous and new columns, select *Expand all* or click on the individual green fields that you would like more information on (see screenshots below).

To view how the corrections made to Provider Price and Capped Subsidy affected previous and new benefit calculations, click on the green *Capped Subsidy* field.
To view how the corrections affected the copay calculations, click on the green **Total Copay** field.
Reducing the Regular Subsidy Hours to 51 also reduced the Family Copayment.

**Offset**

Corrections made to one child or one authorization on a case with multiple children or authorizations can result in subsidy amount changes 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 amount for one child and a larger negative amount for the other. This also may occur with changes 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 case correction with 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.
Offset: Benefit Change Details
To initiate an offset, subsidy amounts must first be confirmed.

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

After benefit confirmation, the PLBC system driver will display the Calculation Correction and Offset Changes by Case page. Click on the “Distribute” button located under 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/ altered manually by a worker. Then select Apply.
After it is applied, the offset amount will be displayed on the *Calculation Correction and Offset Changes by Case* page.

### Offset Deletion

Agencies 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 adjustment request. **You will then be directed back to the Correction of Case screen where you can either edit or delete the PLBC.**

**Offset - Case Benefit Quarterly Summary**

Confirmed PLBC Adjustment amounts and offsets will be processed the following day and can be seen in the *Case Benefit Quarterly Summary* screens found by clicking the *Benefit Summary* link in the CSAW navigation menu.
Click the Benefit amount link to see the calculation details.

Then double-click the Net Subsidy Change green field to expand. This will display the PLBC adjustment amount and offset amount.
PLBC - Updated Parent Notices

PLBC will generate updated Parent Quarterly Subsidy Authorization Notices to participants for case corrections made to current or past months. Corrections 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 updated information.

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

![Table: Monthly Subsidy Amount Change Information]

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

![Table: Added Subsidy Amount to MyWIChildCare Card]

This will display for any negative adjustments calculated in PLBC:

![Table: Overpayment]

Modifications to a PLBC Correction

Any PLBC corrections that are listed as Pending, In-progress, Calculated, or Confirmed on the List of Correction - Case Attributes page may be modified.

To modify a previously made PLBC Correction, select the magnifying glass icon for the Correction that you would like to update. If the calculation is In Progress or Pending status, then you will need to select the pencil icon instead.
If the PLBC Correction you would like to edit is in Calculated or Confirmed Status, you need to reset the calculation and add your corrections. Confirmed Status corrections can only be reset (and then modified), if completed on the same day the request was created.

**Calculated Status – Modification**

To modify a case in calculated or confirmed status, reset the calculation by selecting the magnifying glass icon next to the correction.

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.
Modify Correction – Case Attributes

For information on making additional PLBC modifications, see the previous “Modify Corrections – Case Attributes” section of this guide.

Deleting a PLBC Correction

Any PLBC corrections that are listed as Pending, In-progress, Calculated, or Confirmed on the List of Correction - Case Attributes page may be deleted. If the correction is in Calculated or Confirmed status, you will need to reset the calculation to delete the correction.

To delete a previously made PLBC Correction, select the trash can icon for the correction that you would like to delete.

If the PLBC Correction you would like to delete is in Calculated or Confirmed Status, you must first reset the calculation and then delete the correction request. Confirmed Status corrections can only be reset (and then deleted) if completed on the same day the request was created.
Delete Correction – Case Attributes

Selecting the trash can icon on the List of Corrections - Case Attributes screen will bring you to the Delete Correction – Case Attributes page. To delete the correction, select the Confirm Delete check box, and then the Delete button.

After 'Delete' is selected, you will be returned to the List of Corrections – Case Attributes. The deleted correction will no longer be displayed.
### Summary of Modification and Deletion Actions

<table>
<thead>
<tr>
<th>PLBC Status</th>
<th>Explanation</th>
<th>How to Modify/Delete</th>
<th>How to Proceed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Pending</td>
<td>Pending status occurs when you only submit Case/Provider Attributes for a New Correction.</td>
<td>Use pencil icon to modify. Use the garbage icon to delete the correction on the <em>List of Corrections - Attributes</em> page.</td>
<td>When this is in the Case Attributes, select the type of Case correction request and enter information to proceed to an “In-progress” status.</td>
</tr>
</tbody>
</table>
| In-Progress | In-progress status occurs when Case/Provider Attributes and Correction Information is submitted. | To Modify:
1. Select the pencil icon from the *List of Corrections* page, and then the correct change screen from the Navigation Menu.
2. Or click on “Authorization Link” in the “List of Corrections - Case Attributes” page to modify information.
   To Delete:
   Use the trash can icon in the *List of Corrections* page to delete Case Attributes and Correction information. | Click on the “Calculate” link in the CSAW Navigation Menu. |
| Calculated  | Calculation occurs when you hit the “Calculate Benefit” button. | Select the “Reset Calculation” button to go back to the “In-progress” status. Follow the In-Progress status steps above. | Confirm Benefits |
| Confirmed   | Confirming Benefits occurs when the “Confirm Benefits” button is selected. | Select the “Reset Calculation” button to go back to the “In-progress” status. This can only occur when you do it in the same day. | Wait until the next day for the Correction to be Processed. |
| Processed   | Processed status occurs the day following the Confirmation of the correction. | May not be deleted or modified. You will need to do another PLBC Correction request to modify. | N/A |
Correcting a Processed PLBC Correction

If an agency confirmed an incorrect PLBC Correction and it processed overnight, they need to correct it by doing another PLBC Correction for the same month.

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

<table>
<thead>
<tr>
<th>List of Corrections - Case Attributes</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Case Details</strong></td>
</tr>
<tr>
<td><strong>Case Number</strong></td>
</tr>
<tr>
<td><strong>Primary Person</strong></td>
</tr>
<tr>
<td><strong>Address</strong></td>
</tr>
<tr>
<td><strong>Admin Agency</strong></td>
</tr>
<tr>
<td><strong>RFA Date</strong></td>
</tr>
<tr>
<td><strong>Review Date</strong></td>
</tr>
<tr>
<td><strong>CC AG Status</strong></td>
</tr>
</tbody>
</table>

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

Authorization Correction List will not display the previous PLBC change, it will always show the original information used for the processed authorization.
The changes can be seen in the Authorization Correction page:

Next, follow the processes to modify, calculate, and confirm PLBC’s as described earlier in this guide.

**Client Correction History**

PLBC stores details of each correction made. The yellow scroll icon indicates there is a history; the workers may view the history of corrections any time by clicking on the icon.
Yellow scroll icons can be found on the following pages for clients:

- List of Corrections – Case Attributes
- Income/AG Size
- Eligibility/Copay/DOB
- Authorizations

**List of Correction – Client Attributes**

On the List of Corrections - Case Attributes page, there are yellow scroll icons located next to each correction. If you would like to know more about the correction, select the yellow scroll icon.

Selecting the yellow scroll icon will bring you to the Correction History - Case Attributes screen. This page displays the Case Details information and Correction Request Details for the request (including benefit month, the reasons, the correction type, the status, and the requested date). If a case has had more than one PLBC adjustment made, the page will list the most current corrections first.
If a modification request was submitted, the worker may click the *Updated Date* link to see information about the worker who created the change.

**Correction History - Client Changes**

Workers can also review correction detail history for any type of modification, no matter the status. To do so, navigate to that page and select the yellow scroll icon.
This will bring the user to the *Income/AG Size – Correction History* page. Here, the worker can review the history of the correction.

Select *Back to Case Detail Correction* or the *Updated Date* link for additional information.

The same steps can be followed any time a worker would like to view *Correction History* for client changes on the following pages:

- Income/AG Size
- Eligibility/ Copay/ DOB
- Authorizations

**Correction History - Benefit Calculation**

All PLBC Corrections can also 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.
This will display the initial amount loaded for the month, as well as any PLBC Corrections that were made to the case for the authorization for the identified month.
Provider PLBC Correction

Corrections can also be made to child care providers. The search functions are the same for the PLBC Provider Module as the Client Module.

Left-Side Navigation Menu - PLBC

The Provider Search functionality can be used to search for a provider other than the provider that was entered initially.

In this instance, we will search for a provider.

The Correction of Provider can be used to initiate the PLBC adjustment request for a provider.

Ad Hoc functionality can be used when PLBC is unable to calculate a positive adjustment or negative adjustment correctly. In the Ad Hoc functionality, a worker will have to enter the adjustment amount they calculated manually.
**Search for a Provider**

Search for the provider that requires a correction by entering any of the following information, and then select Search:

- Provider Number
- Location Number
- Tax ID Number
- Facility ID
- First Name (of the Provider)
- Last Name (of the Provider)
- Business Name
- Location Name
- Payee
- FIS Number

For this example, we know the provider’s number and location, so you can enter the information as shown below:

![Search for a Provider]

**List of Corrections - Provider Attributes**

This page displays any initiated PLBC correction requests. This includes information on the Benefit Month, Error Source, Reasons, Requested Date, Status, Correction, and Benefits Changes.

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

**New Correction - Provider Attributes**

All of the fields for this screen are the same as those found in the client corrections. Please see the *New Correction – Case Attributes* section for details on how to complete each field.

Enter information for all fields with an asterisk, and then select *Submit*.

For this correction, Nordic Wonderland submitted incorrect provider prices for the month of January 2018.
List of Corrections - Provider Attributes

After Provider Attributes are submitted, the List of Corrections shows the PLBC Provider adjustment request status as Pending. Now additional ‘Correction’ information needs to be added. To add “Correction” information, select the pencil icon.
Modify Correction – Provider Attributes

Select the appropriate Correction Link in the CSAW Navigation Menu based on the descriptions below. Multiple corrections can be added for the PLBC Provider adjustment request month. Multiple provider corrections can be made for the same month.

- **Accreditation/Star Level**: Use this when an out-of-state provider’s accreditation information or any provider’s YoungStar Star Level Rating needs to be corrected for the current and/or past month. This functionality is only accessible by Department staff. If you have to make an accreditation or Star Level change, please contact the Department for assistance.
- **Prices**: Use this when a provider’s prices need to be updated for the current and/or past month.
- **Authorization End**: Use this when all authorizations at a facility need to be ended on the same date. This is most commonly used in situations of mid-month provider closures.

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 parent’s EBT card. Negative amounts should not be applied to a parent’s EBT card, but towards the provider.

The screen will display the provider prices for the correction month for both full and part-time rates, 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 Regular Price**: Use this when the provider’s price for full-time care (21+ hours a week) needs to be updated.
- **New Part-Time Price**: Use this when the provider’s price for part-time care (<21 hours a week) needs to be updated.
**Prices Correction – Full-Time Weekly**

Add all relevant information for the new provider price. Define the age group by Years and Months, and the new price. Select *Add* when the price is complete.
In this example, the provider’s new full time price for ages 0-1 year and 11 months is $250.
**List of Correction Prices**

At this point, you can either:

- Make an additional correction for the current benefit month
- If no other corrections need to be made, the correction can be calculated by selecting the Calculate link.

---

**Prices Correction – Part-Time Weekly**

Add all relevant information for the new part-time provider price.

Define the age group by Years and Month, and the new price.

Select *Add* when the price is complete.
List of Correction Prices

If no other corrections need to be made, the correction can be calculated by selecting the Calculate link.

For this example, there are no additional changes so select Calculate.

Calculate Correction – Provider Attributes

Review Information and select Calculate Benefit.
A Provider PLBC cannot be calculated if the subsidy amount for a retro-authorization is in Confirmed status for any case connected to that Provider PLBC. The subsidy amount for a retro-authorization enters Confirmed status when the subsidy has been calculated, but is not Processed yet. A validation will prevent workers from calculating a Provider PLBC correction when a retro authorization is in Confirmed status for a connected case.

If there is an unprocessed PLBC for any case connected to the Provider PLBC, the case’s unprocessed PLBC will be reset. A validation will be triggered if this occurs:

**Calculation Correction and Confirm Benefit Changes by Provider**

This page will list all of the children who are impacted by the price changes, what their previous benefit was, what the current benefit is (the calculated amount based off of the changes entered in the correction), and the Calculated Change (what the difference is between the two amounts).

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

- Review calculations for Previous Benefit, Current Benefit, or Calculated Change information by selecting amount links. For example, by selecting $23.70 for Shomma, it will show the calculations for how the Calculated Change was done.
  - **NOTE:** Negative calculations are in parenthesis.
- Select **Reset Calculation** to be able to modify corrections for the PLBC request.
- Select **Confirm Benefit** to apply the positive amounts to the Parent’s MyWIChildCare account, or select **Confirm** to acknowledge negative amounts will be entered into the Benefit Recovery (BV), and a BRITS referral created, if applicable.

For information on how to read the Calculation Details for each case, see the Calculation Details for Calculate Change Link in the client section.
Modifying a Provider Correction

The process for modifying a provider correction is the same as the client modification process. See the “Modifications to a PLBC Correction” section of this document.

Deleting a Provider Correction

The process for deleting a provider correction is the same as the client deletion process. See the “Deleting a PLBC Correction” section of this document.

Correction History – Provider

PLBC stores details of each correction made. Workers may view the history of corrections any time they see a yellow scroll icon.

Yellow scroll icons can be found on the following screens:

- List of Correction – Provider Attributes
List of Correction Prices (Next to any correction requests)

Ad Hoc Adjustments
The purpose of this section is to manage ad hoc benefit changes in the CSAW module. Ad hoc is used for cases that cannot be adjusted appropriately using a Post-Load Benefit Correction (PLBC). The payment adjustment amounts are manually calculated and entered as an Ad Hoc adjustment. This should be used in rare instances and agencies are expected to use a traditional PLBC in most cases.
Client Ad Hoc allows for positive adjustments to be added to the clients’ EBT cards, even during periods when no eligibility existed. The Ad Hoc module can only be used for cases that have had at least one processed payment in CSAW. 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 Ad Hoc allows for adjustments to be made to any child that has an authorization at a certain child care provider. Provider Ad Hoc 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 to process Voluntary Repayment Agreements (VPA’s) in certain situations. It is very unlikely that a local agency would be required to complete a Provider Ad Hoc.

Ad Hoc adjustments can only be initiated and completed by CSAW users with the “C” Child Care Coordinator security profile. Workers with “G” profile privilege will have view only.

**Search for a Case/Provider**

Begin by searching for a case or provider in CSAW. On the corresponding summary screen, click on the drop down arrow next to the PLBC - Case link or the PLBC – Provider link, depending on the type of correction that needs to be made. You may have to use the Case Search link if you have not entered the information of the client or provider that the adjustment will be made for.

Choose the Adhoc Case Adjustments or Adhoc Provider Adjustments link in the Navigation Menu.

**List of Ad hoc Adjustments**

This will bring you to the “List of Ad hoc Adjustments” screen for the case or provider (depending on the type of ad hoc adjustment you are making). The case List of Ad Hoc Adjustments screen will show Ad Hoc adjustments and processed benefits for that case. The provider List of Ad Hoc Adjustments screen will show Ad Hoc adjustments and processed benefits for all cases authorized to that provider. Additionally, the provider “List of Ad Hoc Adjustments” screen has a field to search the Ad Hocs and benefits by Case Number.

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

**Add New Adjustment Screen – Case Ad Hoc Adjustment**

Add the required details. A description for each field is found in the table below.
### Field Descriptions

<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Month</td>
<td>Choose the month the adjustment is for. The ad hoc month does not have to be the same as the benefit month.</td>
</tr>
<tr>
<td>Type</td>
<td>Choose Positive or Negative as the type. If the adjustment is positive, the amount will be loaded onto the EBT card overnight. Negative amounts are not reduced from the amounts on the EBT card, but added to an overpayment table so they can eventually be referred to the Benefit Recovery (BV) System.</td>
</tr>
<tr>
<td>Amount</td>
<td>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”).</td>
</tr>
<tr>
<td>Apply Mode</td>
<td>Apply to Family: If the adjustment is positive, the funds are added to the EBT card.</td>
</tr>
<tr>
<td>Category Type</td>
<td>See the descriptions of category types in the “New Correction – Case Attributes – Reason and Secondary Reason” section of this document.</td>
</tr>
<tr>
<td>Reason</td>
<td>See the description of reason codes in the “New Correction – Case Attributes – Reason and Secondary Reason” section of this document.</td>
</tr>
</tbody>
</table>

### Case Adjustment Search Screen – Client Overpayments Page

If a negative Client Ad Hoc adjustment is made, the details of the adjustment will appear in the “Client Overpayment” screen.

If there was an error when entering the information in the Ad Hoc screen, and this adjustment should have been made as a negative adjustment for the provider, you can select the Transfer to Provider link on the right side of the screen for the adjustment that was made in error.
Add New Adjustment Screen – Provider Ad Hoc Adjustment

You may need to use the case search function in the top right hand corner of the screen to narrow your search results. You can also change the Begin and End Dates of the authorization period for the client that you are looking for. Select the Add Adjustment link for the appropriate case and month for the adjustment that needs to be made.

Add the required details. A description for each field is found in the table below.

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.
<table>
<thead>
<tr>
<th>Field</th>
<th>Description</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Month</td>
<td>Choose the month the adjustment is for. The ad hoc month does not have to be the same as the benefit month.</td>
</tr>
<tr>
<td>Type</td>
<td>Choose Positive or Negative as the type. If the adjustment is positive, the amount will be loaded onto the EBT card overnight. Negative amounts are not reduced from the amounts on the EBT card, but added to an overpayment table so they can eventually be referred to the Benefit Recovery (BV) System.</td>
</tr>
<tr>
<td>Amount</td>
<td>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”).</td>
</tr>
<tr>
<td>Category Type</td>
<td>See the descriptions of category types in the “New Correction – Case Attributes – Reason and Secondary Reason” section of this document.</td>
</tr>
<tr>
<td>Reason</td>
<td>See the description of reason codes in the “New Correction – Case Attributes – Reason and Secondary Reason” section of this document.</td>
</tr>
</tbody>
</table>

**List of Ad hoc Adjustments**

After the adjustment has been added, the *List of Ad Hoc Adjustments* will display the record in *Confirmed by Worker* status.

### List of Ad hoc Adjustments For The Period August 2018 - November 2018

<table>
<thead>
<tr>
<th>Benefit Month</th>
<th>Child’s Name</th>
<th>Pin Number</th>
<th>Provider Location Details</th>
<th>Benefit</th>
<th>Status</th>
<th>Apply To Family</th>
</tr>
</thead>
<tbody>
<tr>
<td>September 2018</td>
<td>[Redacted]</td>
<td>1585283738</td>
<td>Nordic Wonderland 123 Modified Address Rd, Northwoods, WI</td>
<td>($75.00)</td>
<td>Confirmed By Worker</td>
<td>[Redacted]</td>
</tr>
</tbody>
</table>
While in Confirmed by Worker status, the adjustment can be modified (by selecting the pencil icon) or deleted (by selecting the trash can icon). After the record is in Processed status, it cannot be changed.

To add an additional Ad Hoc Adjustment for that benefit month, select the + symbol.

The adjustment will be processed during the night and funds loaded onto the EBT card for a positive adjustment. If it is a negative adjustment, the overpayment must be entered in BV and a referral must be created.

**Case Benefit Quarterly Screen**

After the adjustment has been processed, any case adjustments can be viewed at Case Benefit Quarterly Summary screen in CSAW.

If a negative adjustment is created for a case, the adjustment is displayed on the Case Quarterly Summary screen so there is a record of the adjustment. The amount is not deducted from the benefit loads on the EBT card, and must be entered in the Benefit Recovery (BV) System for Clients.

**Parent Portal**

The amount can also be viewed in the Parent Portal My Account page.
<table>
<thead>
<tr>
<th>Child</th>
<th>Provider</th>
<th>FIS Provider ID</th>
<th>Balance</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sammy (Child #1)</td>
<td>Anna's Kid Care, 4-Star, Dually Reg (regulation &amp; quality)</td>
<td>D205263</td>
<td>$200.00</td>
</tr>
<tr>
<td>Sammy (Child #1)</td>
<td>Randy's Group Care-Do Not Modify (regulation &amp; quality)</td>
<td>D205258</td>
<td>$6,142.94</td>
</tr>
</tbody>
</table>

Total Child Care Balance on Card $6,342.94
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

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 PLBC 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 MyWICare 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 correction 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.
Sequential Calculation Hard-Stop Validation
Because a correction to one month can affect the subsidy calculations for subsequent months, workers must calculate PLBC corrections in sequential order. For example, if an income decrease occurred in March and it is now May, the worker 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.

PLBC and Retro-Authorization on Same Day Hard-Stop Validation
PLBCs can no longer be calculated when the subsidy amount for a retro authorization is in Confirmed status. This happens when a retro authorization has been calculated, but is not Processed yet. A new validation will prevent workers from calculating case-level PLBC corrections when a retro authorization is in Confirmed status for the same case.

A similar validation will prevent workers from calculating a provider-level PLBC corrections when a retro authorization is in Confirmed status for any case connected to that provider-level correction.
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 *Calculation Details for Calculated Change Link* section of this guide.

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