

## Creating a New EBT CSAW-PLBC Client Adjustment Request

1. Conduct a Search on the Case Search screen using the client's case number, name, social security number or PIN. After searching the case, the client's *Case Summary* screen displays
2. Select the PLBC-Case plus (+) sign to expand the sub menu.
  - The **Case Search** functionality can be used to search for another client case other than the case that was initially entered
  - The **Correction of Case** can be used to initiate the PLBC adjustment request for this client case.
  - The **Ad hoc Case Adjustments** can be used to make adjustments to a case's subsidy amounts without using a *Correction of Case*.
3. Select the *Correction of Case* link to view the *List of Corrections-Case Attributes*.
4. Select the *New Correction* link to initiate a new request.
5. 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

6. Select the appropriate *Error Source* based on the descriptions below.
  - **Agency Error:** Utilized when an agency incorrectly processed eligibility or an authorization.
  - **Provider Error:** Utilized when an error was caused by a provider.
  - **Client Error:** Utilized when an error was caused by the client.  
Example: Untimely reporting of changes that effect eligibility or authorizations.
  - **System Error:** Utilized when the error was the result of a system issue.
  - **Client Fraud – IPV:** Utilized when a client has purposely and deliberately violated the program rules.
  - **Provider Fraud – IPV:** Used when a provider has purposely and deliberately violated the program rules.
  - **Collusion:** Used when there was an agreement between people to deceive, mislead, or defraud others which results in their gain or benefit.

NOTE: Selections of Client Fraud-IPV or Provider Fraud-IPV must be approved by BPI. For more information on what qualifies as an error, collusion, or IPV, please refer to Chapter 4 of the Wisconsin Shares Child Care Subsidy Policy Manual.

7. Select the appropriate *Responsible Party Indicator* based on the descriptions below. This indicator will determine which party will receive the adjustment.
  - **Client:** Utilized when a client is liable for the adjustment. ( most frequently selected field for client adjustments)
  - **Provider:** Utilized when a provider is liable for the adjustment.
  - **Client and Provider:** Utilized when client and providers are liable for adjustments. Example: In collusion or when funds are loaded to the client for the incorrect provider and the client partially paid the incorrect provider.
  - **DCF:** Utilized when the Department determines self-liability.
8. Select the appropriate Reason or Reasons based on the descriptions below.
  - **Authorization Error:** Utilized when authorization information needs to be updated (Begin and End dates, Schedule Type, School Closed Hours, Inclement Weather Hours, or Rate Type).
  - **Eligibility Error:** Utilized when eligibility information needs to be updated (eligibility status, child date of birth (DOB), copay type, income, or AG size)
  - **Correction to a Subsidy PLBC:** Utilized 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).
  - **Authorized to Wrong Provider:** Utilized when an authorization was made to the incorrect provider or provider location.

**NOTE: The primary reason is an important choice.** This dictates information that will be used on the "Updated Parent Notices". 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 an eligibility and authorization. For example, the client failed to report an eligible adult in the household (father), therefore corrections need to be made to the AG size, AG income, and authorized hours

9. Comments: In this field, enter any additional comments that are pertinent to why a PLBC adjustment is being made.
10. Select *Submit* when all *New Correction-Case Attributes* are completed.
11. 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 for the appropriate month**
12. Select the appropriate Correction Link in the EBT CSAW Navigation 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 at a time.
  - **Income/AG:** Utilized when income or child care assistance group information needs to be corrected.
  - **Eligibility/Copay/DOB:** Utilized when eligibility, copay type, or date of birth (DOB) needs to be corrected.
  - **Authorizations:** Utilized 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 is pulled by CARES Worker Web (CWW) each month and used in subsidy (benefit) calculations. In the screenshot below, EBT CSAW displays what income and AG size was used in the initial calculation (highlighted in yellow).

1. **Edit income and eligible member appropriately and then select *Add*.**
2. Modify Correction-Case Attributes At this time, the worker may:
3. Add another Correction to the Case (if needed); OR
4. If no other corrections need to be made, the correction can be **calculated by selecting the 'Calculate' link.**
5. 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. NOTE: Negative adjustment calculations are in parenthesis.
  - **Select *Reset Calculation*** to modify corrections for the PLBC request.
  - **Select *Confirm Benefit*** to apply the positive amounts to the Parent's MyWICChildCare account or select Confirm to acknowledge negative amounts will be entered into the Benefit Recovery (BV), and a BRITS referral created, if applicable.

### Eligibility/Copay/DOB Correction

1. **Select the child link** in which a correction to eligibility, copay, or date of birth need to be made. The Eligibility/Copay/DOB – Correction page will load. On this page you may either:
  2. Select the 'No' radio button for the *Eligibility Switch* if the child should not have been eligible for the month. And/OR
  3. Update the date of birth/copay type fields and select *Add*. This will return you to the *Eligibility/Copay/DOB – Correction* page.
  4. After an eligibility/copay/DOB correction has been made 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 EBT CSAW Navigation Menu to add or modify; OR
    - **Select *Calculate* link** in the EBT CSAW Menu if no other corrections need to be made for the PLBC adjustment request.

5. 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. NOTE: Negative adjustment calculations are in parenthesis.
  - **Select *Reset Calculation*** to modify corrections for the PLBC request.
  - **Select *Confirm Benefit*** to apply the positive amounts to the Parent's MyWICChildCare account or select Confirm to acknowledge negative amounts will be entered into the Benefit Recovery (BV), and a BRITS referral created, if applicable.

## Authorization Correction List

1. **Select the child link** in which a correction to an authorization needs to be made.

Correct the following information based on the descriptions below:

2. **Authorization is invalid for a month:** Utilized when the authorization is written to the incorrect provider.
3. **Begin Date:** Utilized when the begin date of the authorization needs to be corrected.
4. **End Date:** Utilized when the end date of the authorized month needs to be corrected.
5. **Schedule Type:** Utilized when there needs to be a correction to the schedule type of Single or Two/Four Weeks and the amount of weekly hours.
6. **Regular School Closed Hours:** Utilized when hours for scheduled school closures needs to be corrected.
7. **Inclement Weather School Closure Hours:** Utilized when hours for inclement weather need to be corrected.
8. **Rate Type:** Utilized 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.
9. **Comments:** Utilized to explain further details as to why the PLBC-Authorization Correction is being initiated.
10. **Select *Submit*** when all the authorization corrections are completed.
11. After an authorization correction has been made for a child, a yellow triangle with an exclamation point will appear next to their name. 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 EBT CSAW Navigation Menu to add or modify. OR
  - **Select *Calculate*** link in the EBT CSAW Menu if no other corrections need to be made for the PLBC adjustment request

12. Review information and **select *Calculate Benefit***.

13. 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. NOTE: Negative adjustment calculations are in parenthesis.
  - **Select *Reset Calculation*** to modify corrections for the PLBC request.
  - **Select *Confirm Benefit*** to apply the positive amounts to the Parent's MyWICChildCare account or select Confirm to acknowledge negative amounts will be entered into the Benefit Recovery (BV), and a BRITS referral created, if applicable.

NOTE: 'Apply To' functionality reflects if the correction is towards the client or family. This is automated based on Client Reason Code used and if the adjustment request results in a positive or negative amount.