Correcting Class of 2022 CTE District Incentive Grant Claims

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Training Agenda

- Class of 2022 claims review & payment timeline

- Major changes for school districts

- A closer look: the new Review & Edit Phase and Resolution Phase

- School district responsibilities

- Demonstration on how to correct claims

- How to request technical assistance

Claims Review & Payment Timeline

- Claim submission deadline: Sept. 30, 2022

- Review & Edit Phase: October 2022 – March 2023

- Resolution Phase: May 2023

- Verification report: late May 2023

- Payment processing: June 2023

Major Changes for School Districts

CTE Incentive Grants claims portal improvements are expected to be rolled out to school districts in March 2023.

Please make sure that your CTE Incentive Grant staff members are aware of the changes and watch this pre-recorded webinar.
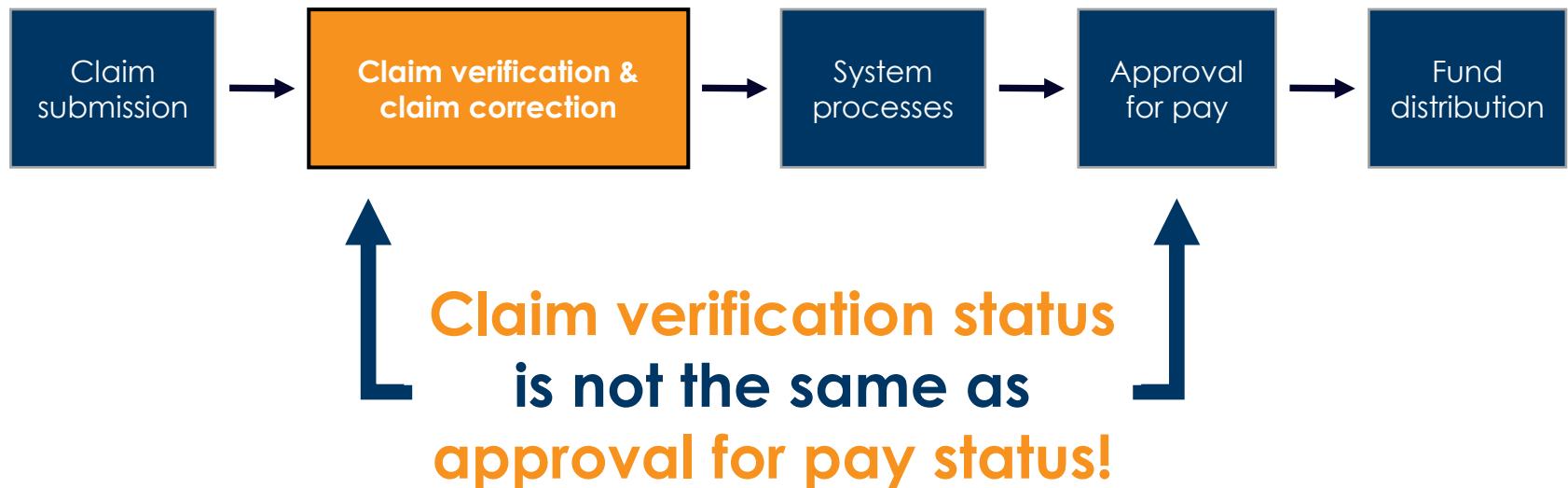
Major Changes for School Districts

The improvements are expected to:

- Increase transparency and communication between reviewers and district staff regarding claims with technical deficiencies.

- Reduce the number of claims not approved for pay due to technical issues.

- Reduce the use of email for resolving claim issues.

- Improve the user experience for district staff.

- Provide districts with more control over correcting claims that don't meet technical requirements.

Major Changes for School Districts

This training focuses on **claim verification status** and the process that school districts will use to correct technical issues with their claims.

| Claim submission | → | **Claim verification & claim correction** | → | System processes | → | Approval for pay | → | Fund distribution |

Claim verification status is not the same as approval for pay status!

Major Changes for School Districts

1. The last chance phase has been moved into the review phase timeline.

   - We'll now refer to it as the Review & Edit Phase

   - New features within the claims portal allow districts to be alerted to claims with technical issues earlier in the claims review cycle.

   - All claims that a district intends to have reconsidered need to be resolved prior to the Review & Edit Phase deadline (March 31, 2023).

Major Changes for School Districts

2. Guidance to district staff is within the claims portal.

   - When claim documentation cannot be verified due to technical issues, reviewers mark the claim as Changes Needed.

   - Districts can filter their claims list to identify the claims marked as such.

   - Reviewers provide guidance to districts through comments saved to the claim so that the district knows what actions need to be taken for the claim to be reconsidered.

Major Changes for School Districts

3. District staff members correct their own claims through the claims portal.

    - District staff members may open and edit claims that have been marked as Changes Needed.

    - Districts may address the claims at their convenience until the Review & Edit Phase deadline (March 31, 2023).

    - Resubmission of an edited claim flags it and allows DWD reviewers to know that the district wants the claim to be reconsidered.

A Closer Look: Review & Edit Phase

Review & Edit Phase: October 2022 – March 2023

- The claims portal verifies Skills Co-op, Infant/Toddler, and Assistant Child Care Teacher completion status.

- Youth Apprenticeship (YA) staff uploads completion data, and the claims portal system verifies each YA claim against the data. YA staff reviews claims that need extra attention.

- DWD staff members manually verify that claim details and documentation meet the requirements for WTCS, Certified Pre-Apprenticeship, and most Business & Industry claims.

A Closer Look: Review & Edit Phase

- Reviewers and YA staff assign a verification status to each claim.
  - Yes, No, Changes Needed
  - All Changes Needed verifications include comments to guide districts on how to make corrections.

- Districts address technical issues for claims that indicate Changes Needed. **This process replaces the 'Last Chance' phase.**

A Closer Look: Review & Edit Phase

- Edits may include changing a certification category, uploading new documentation, and adding a registry number.

- DWD reviewers and YA staff will begin processing the resubmitted claims prior to the deadline but likely won't get through them all by March 31.

A Closer Look: Review & Edit Phase

After the Review & Edit Phase,

- Claims with the verification status of Changes Needed but _not resubmitted_ by the end of the Review & Edit Phase will be assigned a claim verification status of No.

  This status will be final unless an error was made by DWD or the claims portal system.

- YA staff will complete its review of resubmitted YA claims.

- DWD reviewers will complete their review of the other resubmitted claims (WTCS, Certified Pre-Apprenticeship, and Business & Industry except for Infant/Toddler and Assistant Child Care Teacher).

A Closer Look: Review & Edit Phase

- Once all claims have been assigned a claim verification status of either Yes or No, the claims portal will determine an approval for pay status for each claim based on claim verification status, graduation status, and any multiple certifications.

- **DETCTEGrants@dwd.Wisconsin.gov** will notify all roster submitters and district administrators that all resubmitted claims have been addressed and that the Resolution Phase has been opened.

A Closer Look: Resolution Phase

Resolution Phase: May 2023

- School districts can access their verification reports to see the approval for pay status assigned to each of its own claims.

- This phase gives districts a chance to notify DWD if there has been a mistake in evaluating a claim that had been addressed in the Review & Edit Phase or if a reviewer or the system had erroneously verified a claim as No.

- **Technical issues with claims should have been resolved in the previous phase.** This phase is _not_ to address claims that had been marked Changes Needed and should have been addressed in the Review & Edit Phase but weren't.

School District Responsibilities

School districts are responsible for:

- Adhering to program rules and requirements, including submitting proper documentation and filing claims under the correct categories and specific certifications.

- Contacting the DWD CTE lead with their questions.

- Checking their claims lists periodically during the Review & Edit Phase and cleaning up noted deficiencies <u>before</u> the phase closes.

- Promptly reviewing its verification report during the Resolution Phase and notifying DWD if an error has occurred.

Correcting Claims Demonstration

Summary of Review & Edit Phase System Changes

- Edit Phase filter section on Claims Portal Home page

  Currently in Edit Phase

  Filter List by Verification Status: **Verification Status Symbols**

  Changes Needed ⌄   🚩 = Changes Needed

  ✅ = Changes Submitted

  - View claim verification status: Changes Needed, Changes Submitted, Any Status
    - Default filter is to show claims with a claim verification status of Changes Needed
    - Select Any Status to view all saved claims
  - Symbol displays to indicate Changes Needed and Changes Submitted claim verification statuses.

Correcting Claims Demonstration

Summary of Review & Edit Phase System Changes

- Reviewer Comments on student claim pop-up
  - View of comments entered by claim reviewer which explain the changes needed to make the claim eligible for reconsideration

> **Reviewer Comments:** Please provide a signed copy of the certificate showing the student's name and date earned.

- Verification Report
  - New Approved For Pay status
    - All claims will show a status of Undetermined during the Review & Edit Phase

Correcting Claims Demonstration

- Changes permitted during Review & Edit Phase
  - Edit Existing Claim
    - Change Certification Type, Entity, Specific Certification for select claims
      - Note: changes to Skills Co-op, Assistant Child Care Teacher, and Infant/Toddler claims are not allowed
    - Add or edit a Registry or Program number
    - Upload new documentation
    - Add/Edit student address for Student Award Claims

- Only claims with Changes Needed claim verification status can be edited

Correcting Claims Demonstration

- Changes NOT permitted during Review & Edit Phase
  - Add a new claim
  - Delete a claim
  - Delete documentation in an existing claim
  - Import new claims from State-Certified Co-op

Correcting Claims Demonstration

Correcting Claims: Step-by-Step

- Login to CTE – Technical Incentive Grant application via WISEhome

Correcting Claims Demonstration

Correcting Claims: Step-by-Step

- Verify Currently in Edit Phase filter section displays on District Home page and verification status filter is set to Changes Needed
  - If there are no claims set to Changes Needed, the claims list will be empty. Change the filter to Any Status to view all saved claims.

2022 Student Graduate CTE Technical Certification Roster

Currently in Edit Phase

Filter List by Verification Status:

[Changes Needed ⌄]

Verification Status Symbols

🚩 = Changes Needed

☑ = Changes Submitted

Correcting Claims Demonstration

Correcting Claims: Step-by-Step

- Click the Edit button to the right of the first claim with the Changes Needed flag
  - This is the same edit button you would use to edit a claim during the original submission phase

Date Last Submitted		Student WISEid	Student Last Name	Student First Name	Certification Category	Certification Entity	Specific Certification	Registry # or State-Approved Program #	Certification Documentation		
09/15/2022	🚩	1010101010	STUDENT	THIS	Business & Industry	International Fire Service Accreditation Congress (IFSAC)	Fire Fighter 1	10000-23		✎	✖

Correcting Claims Demonstration

- Carefully read Reviewer Comments at the top of the claim pop-up to determine changes needed

Edit Student For: School District

Reviewer Comments: Registry number is invalid - please provide current registry number for this student.

1010101010 - THIS STUDENT

Certification Category:	Business & Industry ▼
Certification Entity:	International Fire Service Accreditation Congress (IFSAC) ▼
Specific Certification:	Fire Fighter 1 ▼

Reminder: Enter a separate claim for EACH certificate program completed so that the student is appropriately identified for student funding.

Registry #

10000-23

Correcting Claims Demonstration

- Make necessary changes to the claim; upload new documentation if necessary, following student privacy guidelines (no SSN, student ID, birth date, address or other PII)

- When all requested changes are complete, click the Save button at the bottom of the pop-up to save your changes

  - Note: This does not "submit" your changes; you will submit all changes together once all claims have been corrected

Correcting Claims Demonstration

When all flagged claims have been corrected, check the District Acknowledgement box at the bottom of the page and click the Submit button to submit all changes back to the reviewers

District Acknowledgment

By checking this acknowledgment box, I certify that the student certification information I am submitting, on behalf of my district, is accurate to the best of my knowledge. By selecting the Submit button, I am requesting that the information provided be reviewed for program eligibility.

☐   Submit

Correcting Claims Demonstration

- Once changes are submitted, the claim verification status changes from Changes Needed to Changes Submitted

- To see resubmitted claims, select Changes Submitted in the verification status filter list; to see all claims originally submitted, select Any Status

 - Claims that were resubmitted will show a new Date Last Submitted

Resolution Phase Demonstration

Summary of Resolution Phase System Changes

- Visibility of reviewer comments on Verification Report

Approved For Pay
No - Program not completed See Comments

- Click the See Comments link to view comments relating to documentation issues.

Reviewer Comments	✕
Reviewer Comments	

Date	Comments
2/6/23 05:35 PM	Name on the certificate does not match student name; revised certificate not provided by district

Close

Request Technical Assistance

If you have questions about correcting a claim through the claims portal or any other CTE Incentive Grant topic, please feel free to reach out to us in the following ways.

- Email: **DETCTEGrants@dwd.Wisconsin.gov**

- Phone: Nancy Kargel, CTE Lead 608-733-3887

- Help Ticket for problems with the CTE portal: **help ticket (https://dpi.wi.gov/wisedata/help/request)**

Thank you!

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