Technical Assistance Training: Correcting and Verifying Claims

Career and Technical Education (CTE) Incentive Grants

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Training Agenda

- Claims Timeline and Overview
- Editing and Verifying Claims
- School District Responsibilities
- Live Demonstration on Correcting Claims
- Review Demonstration (Slides and Discussion)
- Q & A
- How to Request Assistance

Claims Timeline

Jan	Feb	Mar	Apr	May	Jun	Jul	Aug	Sept	Oct	Nov	Dec
					Districts submit claims				Reviewers review claims		
Reviewers review claims		Districts correct technical issues	Resolution (includes districts viewing verification reports)		Finalize approvals for pay						

Note: Timeline may be adjusted as program demands require.

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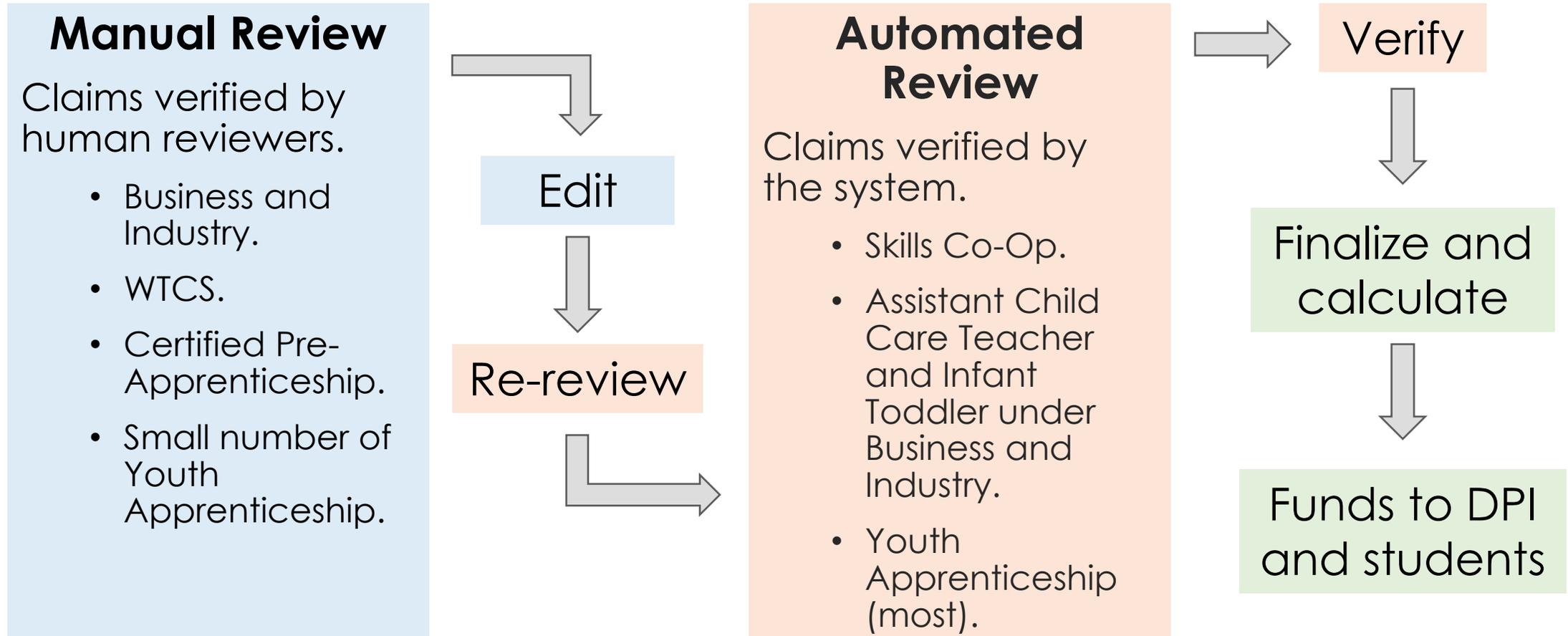Note: This timeline may be adjusted as program demands require.

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Editing and Verifying Claims

Manual Review

Claims verified by human reviewers.

- Business and Industry.
- WTCS.
- Certified Pre-Apprenticeship.
- Small number of Youth Apprenticeship.

Edit

Re-review

Automated Review

Claims verified by the system.

- Skills Co-Op.
- Assistant Child Care Teacher and Infant Toddler under Business and Industry.
- Youth Apprenticeship (most).

Verify

Finalize and calculate

Funds to DPI and students

Editing – Technical Issues

Technical issues:

- Make the claim ineligible as it was submitted.
- may be able to be corrected to change claim eligibility.

Examples:

- Unsigned certificate.
- Incorrect document type.
- Incorrect program number.
- Incorrect category, certification entity or specific certification.
- Missing registry number.
- Wrong student's documentation.

Editing – Back and Forth

Strong advice:

Correct and resubmit your claims well in advance of the deadline so that there is time for back-and-forth resolution before the deadline.

Editing – Back and Forth

- Monitor all flagged claims even after resubmitting.

- Contact the program lead with questions.

- Work collaboratively with the program lead.

- Give the program lead a heads up if the issues can't be resolved so that the claims can be cleared from the list.

Edit & Verify Notifications

- When:
  - March for Edit.
  - May for Verify.
- How:
  - On the [DWD CTE web page](#).
  - By email using the program lead's email distribution list.
- Who receives email:
  - Claim submitters, district administrators, and others requested to be on the list.

Important Notice

Deadlines are firm!

The editing deadline – usually in March:

> Claims with the verification status of Changes Needed but <u>not resubmitted</u> by the corrections deadline will be assigned a claim verification status of No and will not be approved for pay. The status will be final.

Verification Report review deadline – usually in May:

> Districts must notify the CTE program lead of any errors on the verification report before the posted deadline.

School District Responsibilities

- Resubmit claims that adhere to program rules and requirements.

- Take action before deadlines.

- Follow guidance provided in comments.

- Ask questions when in doubt.

- Notify the program lead when changes in contact information.

- Review verification report and promptly report errors.

Live Demonstration

Demo Content:

- Verified statuses and claims filter.

- Viewing changes needed.

- Reviewer comments.

- Documentation reminders.

- Types of changes accepted, submitting changes.

- Viewing status for all claims.

- Resolution phase: Verification Report.

Review Demonstration

Review steps for correcting claims.

- Login to CTE – Technical Incentive Grant application via WISEhome.

Review Demonstration

- Edit Phase filter section on Claims Portal Home page.

o Symbol displays to indicate Changes Needed and Changes Submitted claim verification statuses.
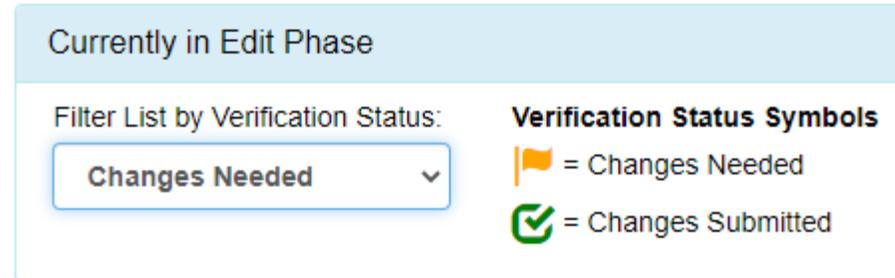
o View claim verification status: Changes Needed, Changes Submitted, Any Status.

- Default filter is to show claims with a claim verification. status of Changes Needed.

- Select Any Status to view all saved claims.

Review Demonstration

- 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.

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Review 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

Review 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.

Review 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.

Review 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.

Review 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

Review 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, and to see all claims originally submitted, select Any Status.

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

Resolution Phase Demonstration

Review of Resolution Phase Verification Report

• Select Verification Report on District tab,

• Approved for Pay shows Undetermined until reviews are complete, then Yes or No with reason and comments,

Approved For Pay
No - Program not completed See Comments

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

Question & Answer

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How to Request 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.

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

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

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

Thank you!

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