

## Children's Long-Term Support (CLTS) Parental Payment Limit User's Guide for the Automated Worksheet and the Printed Reference Tables

### Scope of This User's Guide

This document is intended to help Support and Service Coordinators (SSCs) (1) navigate and enter data into the automated CLTS Parental Payment Limit (PPL) worksheet and (2) make use of the printed reference tables. If you need guidance as to **what** or **whose** income is considered when calculating the CLTS PPL, **how** to determine the disability deduction, or other aspects of how to apply the PPL, please refer to the Frequently Asked Questions document at <https://www.dhs.wisconsin.gov/clts/waiver/clts-parent-limit-faq.pdf>.

### Overview of The Automated Worksheet

The worksheet is a Microsoft Excel spreadsheet. The spreadsheet is password-protected, and most cells are "locked" in order to prevent changes to information used in the calculation of the Parental Payment Limit.

We **strongly suggest** that you keep the spreadsheet **read-only**, and use it as a template. If you wish to save a specific fee calculation, use the *File - Save As* function and give the saved calculation a new file name.

The automated worksheet is intended to help SSCs to easily and accurately compute the CLTS Parental Payment Limit for the family of a CLTS Waiver or Children's Community Options Program (CCOP) participant. The SSC will work directly with the family to determine the necessary components of the formula: family size, income, allowable deduction, service cost, and so on. When the information has been gathered, the SSC enters it into the worksheet to automatically calculate the CLTS Parental Payment fee and provide the family with a printout of that calculated amount. See the following pages for detailed instructions.

An updated worksheet will be provided each year after the Federal Poverty Guidelines are published. Please continue to use the published worksheet until a new one is issued, even if updated Federal Poverty Guidelines have been published.

### Overview of the Reference Tables

The spreadsheet contains a separate tab with the formulas used for determining PPL. These formulas are based upon [Administrative Rule DHS 1](#), which defines the Parental Payment Limit requirements. This formulas page of the spreadsheet is formatted to be printed as a reference if desired, and is intended to help service coordinators and families get an estimate of what a family's CLTS Parental Payment Limit might be. These tables are **for reference only**, and not to be used as an official tool for calculating a CLTS Parental Payment Limit. See page 6 of this document for more information.

### Detailed Instructions for Using the Automated CLTS Parental Payment Limit Workbook

After collecting all the necessary information, open the Microsoft Excel spreadsheet named **PaymentLimitWorksheet.xls**. Be sure that you are using the most current workbook. The year appears on the formulas page of the worksheet.

The spreadsheet has a "Data Entry" tab and a "Formulas" tab. All information is to be entered on the "Data Entry" tab. As data is entered on the first tab, Excel refers to specified items on the "Formulas" tab to make the necessary calculations based upon the data entered.

**Special Notes About Data Entry:** Use the TAB key on your keyboard to move between fields. To navigate backwards, hold down the SHIFT key while pressing TAB. All fields that require a dollar amount are automatically formatted as currency fields, and dollar signs will be displayed automatically. Do not type the dollar sign in any field. A field whose value is **subtracted** in the underlying formula will be displayed in RED.

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DEPARTMENT OF HEALTH SERVICES  
Division of Medicaid Services  
F-01337 (01/2019) STATE OF WISCONSIN

### WORKSHEET FOR DETERMINATION OF PARENTAL PAYMENT LIMIT FOR CHILDREN'S LONG-TERM SUPPORT AND CHILDREN'S COMMUNITY OPTIONS PROGRAMS

Child's Name: \_\_\_\_\_

Parent/Guardian(s): \_\_\_\_\_

County Representative:

Date Completed: \_\_\_\_\_ (mm/dd/yyyy)

Parental Payment Start Date: \_\_\_\_\_ (mm/dd/yyyy)

Family Size:

12	1. Enter the Adjusted Gross Income as it appears on the most recent federal tax return.	
13	2. Enter either the Standard Deduction (\$3,300 per child with qualifying disability) or the total allowable medical expenses reported on the most recent federal tax return.	<b>\$3,300</b>
14	3. CLTS/CCOP Income for Determination of Payment Limit (computed automatically)	
15		
16		
17		
18	4. Enter the Daily Cost of all CLTS or CCOP Services for this Child. **	
19	5. Enter the Daily CLTS or CCOP Support & Service Coordination Costs. **	
20	6. Daily CLTS or CCOP Cost for Parental Payment Limit: (computed automatically)	<b>\$0.00</b>
21	7. Annual CLTS or CCOP Cost for Parental Payment Limit: (computed automatically)	<b>\$0.00</b>

DataEntry Formulas

1. Open the worksheet and select the "Data Entry" tab. A worksheet will be displayed (see Figure 1).

2. Enter the name of the child, the parents or guardians, and SSC; date the worksheet was completed; and date the Parental Payment Limit is due to begin. (Use the TAB key on your keyboard to move between fields.)
3. Enter the Family Size.
4. Enter the information required in Lines 1 through 3 as described below:
  - Line 1:** Enter the Adjusted Gross Income and press TAB or ENTER on your keyboard.
  - Line 2:** Leave the \$3,300 standard deduction which is already entered, OR type over it to enter a different allowable deduction amount. Press TAB or ENTER on your keyboard.
  - Line 3:** The **CLTS Income for Determination of Payment Limit** will be automatically displayed.

If the CLTS Income is **less than the minimum required** for a CLTS Parental Payment to apply, the total will appear in red and a box will be displayed indicating that the process should stop (see Figure 2).

Print the page for the record and the process is concluded.

The screenshot shows an Excel spreadsheet with the following data:

4	Parent/Guardian(s):	Mr. and Mrs. Doe
5	County Representative:	Support and Service Coordinator
6	Date Completed:	1/31/2019 (mm/dd/yyyy)
7	Parental Payment Start Date:	3/1/2019 (mm/dd/yyyy)
8		
9		
10	Family Size:	5
11		
12	1. Enter the Adjusted Gross Income as it appears on the most recent federal tax return.	\$75,000
13	2. Enter either the Standard Deduction (\$3,300 per child with qualifying disability) or the total allowable medical expenses reported on the most recent federal tax return.	\$3,300
14	3. CLTS/CCOP Income for Determination of Payment Limit (computed automatically)	\$71,700
15	<b>STOP! There is no Parental Payment</b>	
16		
17		
18	4. Enter the Daily Cost of all CLTS or CCOP Services for this Child. **	
19	5. Enter the Daily CLTS or CCOP Support & Service Coordination Costs. **	
20	6. Daily CLTS or CCOP Cost for Parental Payment Limit: (computed automatically)	\$0.00
21	7. Annual CLTS or CCOP Cost for Parental Payment Limit: (computed automatically)	\$0.00
22	** Do NOT include Administrative Costs or Child Care Costs.	
23		
24		
25	Monthly Payment Limit	Annual Payment Limit
26		

Figure 2. The CLTS Income on Line 3 is less than the minimum required for a Parental Payment Limit to apply, so you may stop the process here. Print this page for the record.

If the CLTS Income is **equal to or greater than the minimum required** for a CLTS Parental Payment Limit to apply, the total will appear in blue and a box will be displayed prompting you to continue to the next step (see Figure 3).

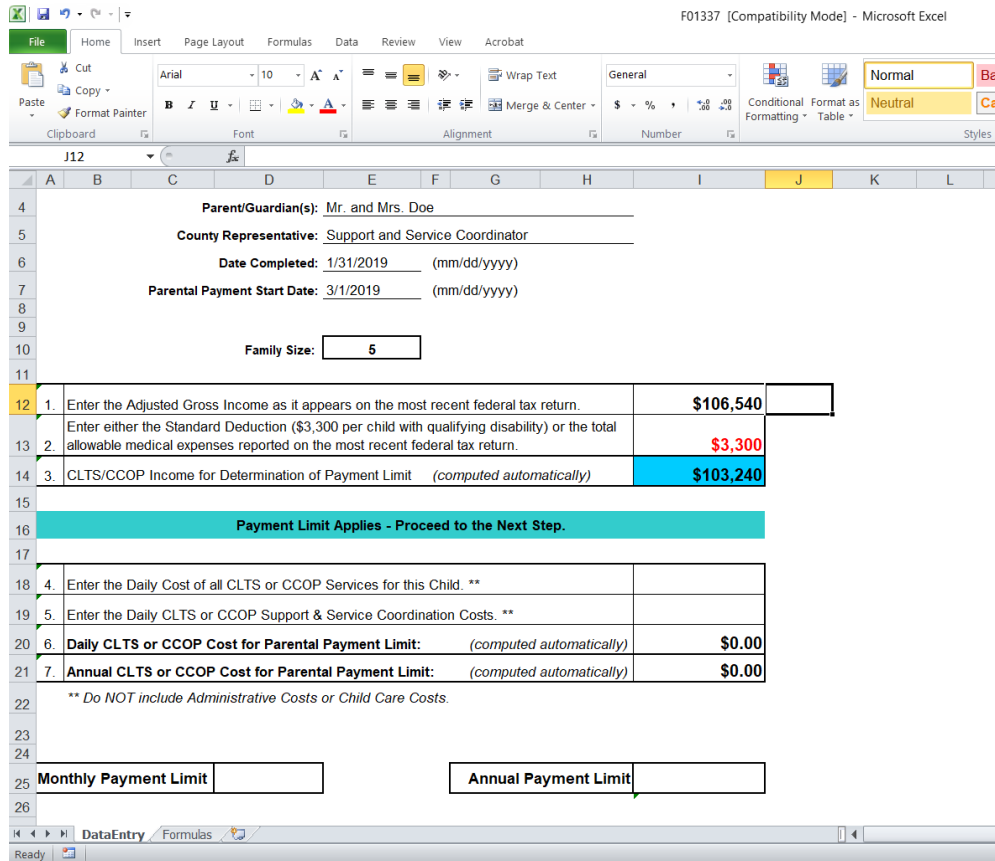


Figure 3. You are prompted to continue if the CLTS Income is equal to or greater than the minimum required.

5. Enter the information required in Lines 4 and 5 as described below:

- Line 4:** Enter the Daily Cost from the ISP and press TAB or ENTER on your keyboard. *Note: do NOT include your admin costs or child care costs in this amount.*
- Line 5:** Enter the Daily Support and Service Coordination Cost and press TAB or ENTER on your keyboard. (This amount will appear in RED, and it will be deducted from the Daily Cost.) *Note: do NOT include your admin costs in this amount.*
- Line 6:** The Daily CLTS Cost for Parental Payment Limit will be displayed.
- Line 7:** The Annual CLTS Cost for Parental Payment Limit will be displayed (this is the Daily Service cost multiplied by 365).

After the entry is complete, the Monthly Payment Limit and the Annual Payment Limit will be displayed in the boxes provided at the bottom of the screen. (See Figure 4.)

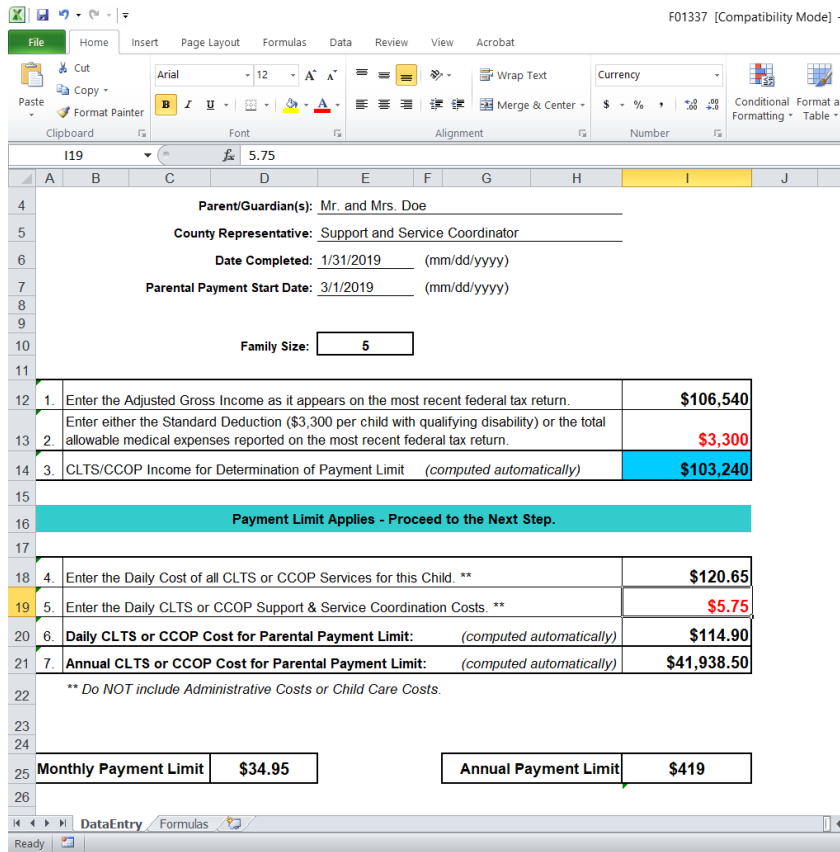


Figure 4. After entering the required information, the Month and Annual Payment Limits are displayed in the boxes provided. This page should be printed on agency letterhead for the record.

- Print the finalized calculation worksheet on your agency's letterhead (Figure 5). When finished, close the Excel spreadsheet. If you need to save this specific calculation, do the *File - Save As* function and give the spreadsheet a new name. That way, your template will always remain blank and ready for new data.

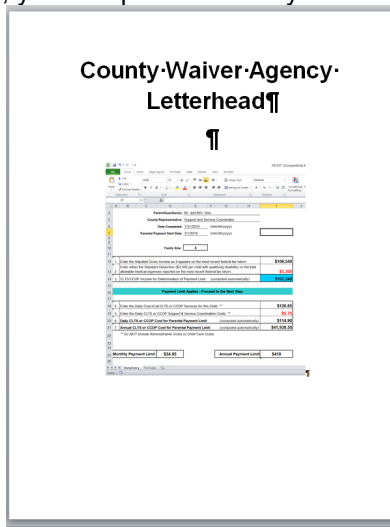


Figure 5

## Reference Tables / Formulas

The "Formulas" tab of the spreadsheet contains the formulas used for determining Parental Payment Limit. These formulas are based upon Administrative Rule DHS 1, which defines the Parental Payment Limit, and can be found online at [http://docs.legis.wisconsin.gov/code/admin\\_code/dhs/001/1.pdf#page=10](http://docs.legis.wisconsin.gov/code/admin_code/dhs/001/1.pdf#page=10).

The page is formatted to be printed as a reference if desired, and is intended to help service coordinators and families get an estimate of what a family's CLTS Parental Payment Limit might be. These tables are **for reference only**, and not to be used as an official tool for calculating a CLTS Parental Payment Limit. See page 6 of this document for more information

The page can be printed before any family-specific information has been entered on the Data Entry tab, in which case the formulas will show the Federal Poverty Guidelines for the current year as well Parental share of plan cost as a percentage based upon income range, as defined by Admin. Rule DHS 1 (see Figure 6).

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2019 Federal Poverty Level (FPL)		Adjusted Gross Income (% of FPL)		Parent Share of Plan Cost	Income Range	
Family Size	FPL	less than 330%		0.0%		\$99,560
1	\$12,490	330%	to less than 355%	1.0%	\$99,561	\$107,104
2	\$16,910	355%	to less than 380%	1.8%	\$107,104	\$114,646
3	\$21,330	380%	to less than 405%	2.6%	\$114,646	\$122,189
4	\$25,750	405%	to less than 430%	3.4%	\$122,189	\$129,731
5	\$30,170	430%	to less than 455%	4.2%	\$129,731	\$137,274
6	\$34,590	455%	to less than 480%	5.0%	\$137,274	\$144,816
7	\$39,010	480%	to less than 505%	5.8%	\$144,816	\$152,359
8	\$43,430	505%	to less than 530%	6.6%	\$152,359	\$159,901
9	\$47,850	530%	to less than 555%	7.4%	\$159,901	\$167,444
10	\$52,270	555%	to less than 580%	8.2%	\$167,444	\$174,986
ea addtl	\$4,420	580%	to less than 605%	9.0%	\$174,986	\$182,529
		605%	to less than 630%	9.8%	\$182,529	\$190,071
		630%	to less than 655%	10.6%	\$190,071	\$197,614
		655%	to less than 680%	11.4%	\$197,614	\$205,156
		680%	to less than 705%	12.2%	\$205,156	\$212,699
		705%	to less than 730%	13.0%	\$212,699	\$220,241
		730%	to less than 755%	13.8%	\$220,241	\$227,784
		755%	to less than 780%	14.6%	\$227,784	\$235,326
		780%	to less than 805%	15.4%	\$235,326	\$242,869
		805%	to less than 830%	16.2%	\$242,869	\$250,411
		830%	to less than 855%	17.0%	\$250,411	\$257,954
		855%	to less than 880%	17.8%	\$257,954	\$265,496
		880%	to less than 905%	18.6%	\$265,496	\$273,039
		905%	to less than 930%	19.4%	\$273,039	\$280,581
		930%	to less than 955%	20.2%	\$280,581	\$288,124
		955%	to less than 980%	21.0%	\$288,124	\$295,666
		980%	to less than 1005%	21.8%	\$295,666	\$303,209
		1005%	to less than 1030%	22.6%	\$303,209	\$310,751
		1030%	to less than 1055%	23.4%	\$310,751	\$318,294
		1055%	to less than 1080%	24.2%	\$318,294	\$325,836
		1080%	to less than 1105%	25.0%	\$325,836	\$333,379

Current Family Size	5
Fed. Poverty Limit	\$30,170
Adj. Gross Income	\$103,240
% of FPL	342%
Liability Percentage	1.0%
Annual Plan Cost	\$41,939
Annual Liability	\$419
Monthly Liability	\$35

330% FPL for this family size is \$99,561

After entering data on the Data Entry page, the information for the specific family is displayed, as shown in Figure 7.

The screenshot shows a spreadsheet with two main tables. The left table is titled '2019 Federal Poverty Level (FPL)' and lists family sizes from 1 to 10, along with their corresponding FPL values. The right table is titled 'Adjusted Gross Income (% of FPL)' and lists income ranges from 'less than 330%' to '1105%' with corresponding percentages and income values. A callout box points to the right table with the text: 'Figure 7: After data has been entered on the Data Entry Fields, information specific to the family is displayed.'

2019 Federal Poverty Level (FPL)		Adjusted Gross Income (% of FPL)			Parent Share of Plan Cost	Income Range
Family Size	FPL					
1	\$12,490	330%	to less than	355%	0.0%	\$99,561 - \$107,104
2	\$16,910	355%	to less than	380%	1.0%	\$107,104 - \$114,646
3	\$21,330	380%	to less than	405%	1.8%	\$114,646 - \$122,189
4	\$25,750	405%	to less than	430%	2.6%	\$122,189 - \$129,731
5	\$30,170	430%	to less than	455%	3.4%	\$129,731 - \$137,274
6	\$34,590	455%	to less than	480%	4.2%	\$137,274 - \$144,816
7	\$39,010	480%	to less than	505%	5.0%	\$144,816 - \$152,359
8	\$43,430	505%	to less than	530%	5.8%	\$152,359 - \$159,901
9	\$47,850	530%	to less than	555%	6.6%	\$159,901 - \$167,444
10	\$52,270	555%	to less than	580%	7.4%	\$167,444 - \$174,986
ea addtl	\$4,420	580%	to less than	605%	8.2%	\$174,986 - \$182,529
		605%	to less than	630%	9.0%	\$182,529 - \$190,071
		630%	to less than	655%	9.8%	\$190,071 - \$197,614
		655%	to less than	680%	10.6%	\$197,614 - \$205,156
		680%	to less than	705%	11.4%	\$205,156 - \$212,699
		705%	to less than	730%	12.2%	\$212,699 - \$220,241
		730%	to less than	755%	13.0%	\$220,241 - \$227,784
		755%	to less than	780%	13.8%	\$227,784 - \$235,326
		780%	to less than	805%	14.6%	\$235,326 - \$242,869
		805%	to less than	830%	15.4%	\$242,869 - \$250,411
		830%	to less than	855%	16.2%	\$250,411 - \$257,954
		855%	to less than	880%	17.0%	\$257,954 - \$265,496
		880%	to less than	905%	17.8%	\$265,496 - \$273,039
		905%	to less than	930%	18.6%	\$273,039 - \$280,581
		930%	to less than	955%	19.4%	\$280,581 - \$288,124
		955%	to less than	980%	20.2%	\$288,124 - \$295,666
		980%	to less than	1005%	21.0%	\$295,666 - \$303,209
		1005%	to less than	1030%	21.8%	\$303,209 - \$310,751
		1030%	to less than	1055%	22.6%	\$310,751 - \$318,294
		1055%	to less than	1080%	23.4%	\$318,294 - \$325,836
		1080%	to less than	1105%	24.2%	\$325,836 - \$333,379
		1105%	to less than		25.0%	\$333,379 - \$340,921

This formula page is formatted for ease of printing as shown below:

The printed version of the spreadsheet shows the same data as Figure 7, but in a more compact, printer-friendly layout. The tables are smaller and the text is more condensed. The callout box is no longer present.