

Fall, Fuel & Crisis, Oh My!!

Join us as we navigate through the whirlwind of the Fall Fuel & Crisis Season. Case management tips, final bill process & more. Let's help our citizens feel like there's no place like home this season!

The Road We'll Travel....



Case Management Tips



Fuel Preapproval Changes



Crisis Repairs, Replacements & Security Deposits



Navigating Changes & The Final Bill Process



The Manual Payment Process

Case Management Tips

The Fuel & Crisis Components can be an intense time for Energy Workers.

Having to navigate multiple components simultaneously can be stressful and overwhelming.

Over the next few slides we will look at different case management tools to assist you in managing and balancing your workload during the fuel & crisis seasons.

Application overload: Managing your Pending list

To ensure you have an accurate pending list, pend applications by the end of each week.

Pull your Pending by Component report each day and work from it

Have a way to track applications that have pending verifications.

A running document or spreadsheet with due dates

Put tasks in your outlook calendar on date the verifications are due

What strategies do you use to keep track of your pending applications?

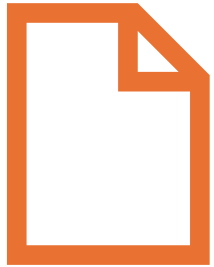
Accessing the Pending By Component Report

- From the Left Navigation
 - Select Inquiry
 - Select EAP/PIPP
 - Select Pending by Component
 - Select your locality from the dropdown menu
 - Select the component (Fuel/Crisis)
 - Hit Search
- *You can sort your pending applications by date to see which have been pending the longest.

The screenshot displays the 'Pending by Component Search' interface. On the left is a navigation tree with 'Inquiry' expanded and 'EAP/PIPP' selected. The main area shows search filters: 'Locality' set to 'Central Office (999)' and 'EAP Component/Program' set to 'EAP - Fuel Assistance'. Below the filters are 'Reset' and 'Search' buttons. The search results are displayed in a table with the following columns: FIPS, Worker, Last Name, First Name, Middle Initial, Case/Application #, Application Date, and Days.

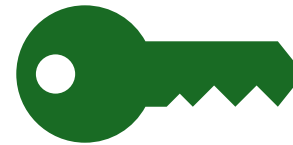
FIPS	Worker	Last Name	First Name	Middle Initial	Case/Application #	Application Date	Days
------	--------	-----------	------------	----------------	--------------------	------------------	------

Additional Case Management Tips



Consider using different color paper for your Crisis & Fuel Paper Applications so they are easily identified.

For Example: Use Pink Paper for all Fuel Apps & Yellow for Crisis



Ensure you are keying in Crisis Credit Authorizations as they come in.

If you are unable to key them in as they arrive, pick one or two days per week to key in any CA's that need payment.

Have your own Case Management Tips?

Let's take a moment to share what does work for you....

What hasn't worked for you?

History Case Info

Navigation Organizer

- Redetermination
- Interfaces
- Inquiry
- Replacement Cards
- DMIS
- Maintain LDSS Resources
- Vendor Management
- Ad Hoc Reports
- Reports Search
 - Child Care
 - Medicaid
 - DMIS
 - Asset
 - Verification
 - Multi Program
 - EAP**
 - Finance
 - Fraud Management
 - SNAP
 - VDSS
 - TANF
 - PIPP Reports
 - Quality Control
 - SNAP Aptrack
 - Conversion
 - Appeals
 - Useful Links

EAP

EAP Reports ? ⓘ

Search Criteria

Report ID:

Report Name:

Search Results


- ▶ Report ID
- Funds Encumbered and Paid by Fuel Type
- Households Served by Vulnerability, Race, and Income
- LIHEAP Effectiveness in Virginia - Crisis and Cooling
- LIHEAP Effectiveness in Virginia - Fuel
- LIHEAP Year End Household Report
- Number and Amount of Payments by Payment Method
- Number of Payments and Amount by Service Type
- PIPP Renewal Due Date Report
- Pending by Component - State
- Performance Measure All Households Raw Data Report
- Performance Measure Bill Payment Raw Data Report
- Performance Measure Restoration and Prevention Raw Data Report
- Referral to Weatherization Assistance Program Report
- Returned EAP Payments Report
- Statewide EAP Claim Report
- Statewide Household Size Served and Living Arrangement
- Statistical reports produced as part of Benefit Determination
- Unpaid by Component**
- Vendor Data Report - Crisis Cooling
- Vendor Data Report - Fuel

Unpaid By Component Report:

- From the Left Navigation scroll down to Reports Search
 - Select EAP
 - Select Unpaid by Component from the Report Name Dropdown menu
 - Run Report

- *Unpaid by Component reports are updated overnight. They are not in real time but is a useful tool for managing your unpaid Credit Authorizations.

Fuel Preapproval Changes



Fuel Assistance Pre-approval Changes

- These changes include the following:
 - Change for a different heat source
 - An updated vendor and/or account number
 - Adding or removing household members
 - Updating income
 - Closing a Fuel Assistance case (client moved out of locality or no longer wants to receive assistance)

Crisis
Repair/Replacement &
Security Deposits

Crisis Assistance
services offered
on/after
November 1

Repair of primary heating system – up to \$800

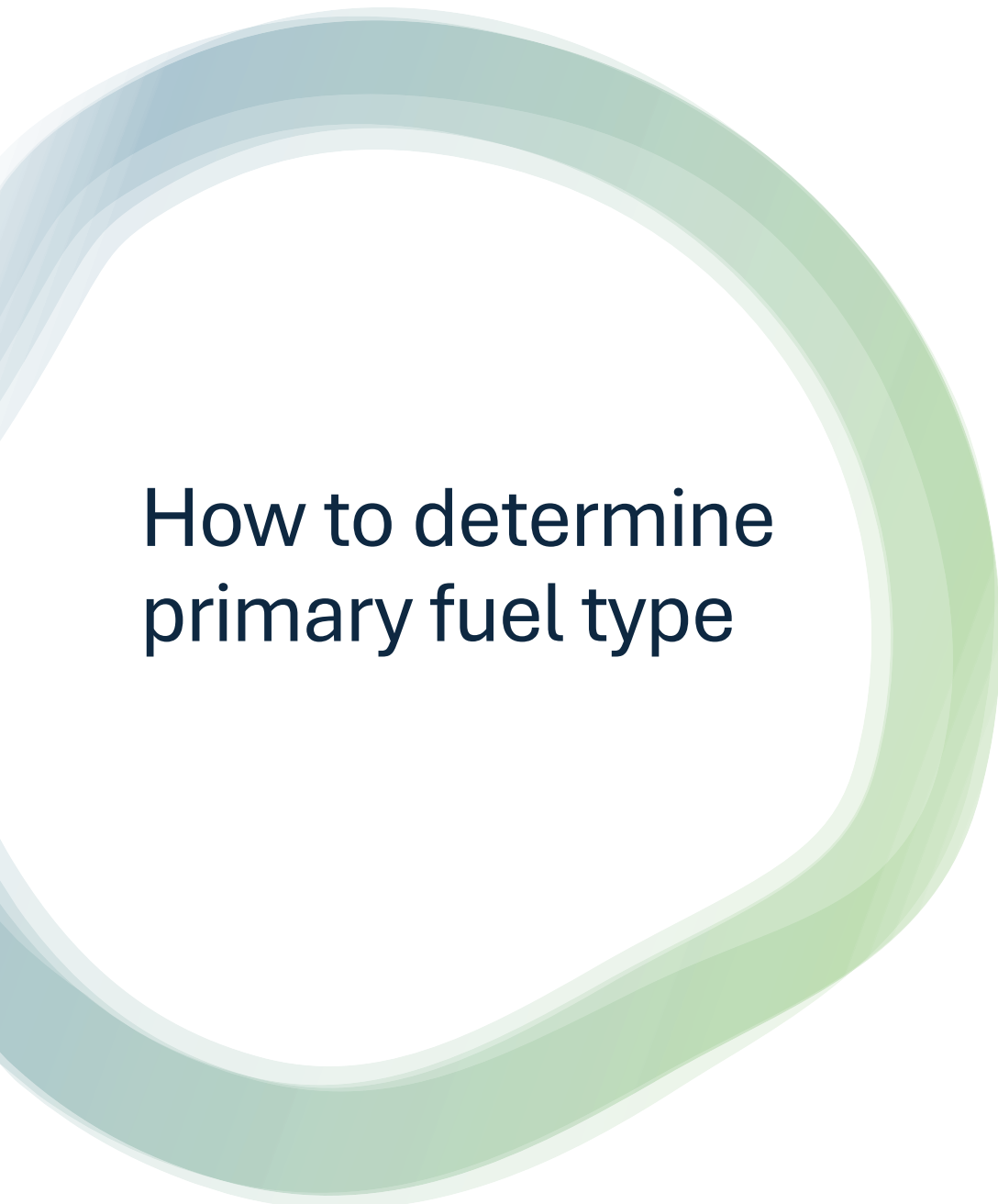
Maintenance or supplemental equipment – up to \$1,200

Heating Equipment replacement/purchase - up to \$3,000

Security Deposit – up to \$200 for primary heat source

Purchase of a portable space heater for temporary use – up to \$200

Payment for Emergency Shelter- up to \$200



How to determine primary fuel type

- Primary Heat System – The primary heating system is the equipment that is currently used to heat the *majority* of the house.
- Primary Fuel Type – The primary fuel type is the main fuel used to operate the primary heating equipment. Think of the primary fuel as what creates the heat, not what moves the heat around.

Example – the household has a furnace that uses natural gas. The furnace requires electricity to operate, however, the gas creates the heat. The primary fuel type would be natural gas.

Combining Supplemental and Repair

Renters can receive potentially receive repair and supplemental/maintenance if the responsibility for the upkeep/maintenance of the heating equipment has been verified with a lease or landlord statement.

When approving both supplemental and repair for any household, it's imperative that the combination approved for both services does not exceed \$1200. Be mindful of the amounts you enter in the 'service request amount' field on the Crisis Assistance screen.



How to process purchase/replacement requests

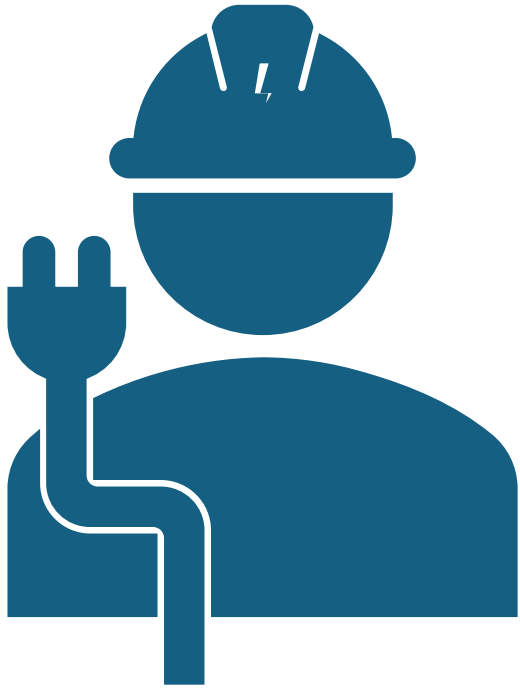
- Only homeowners can potentially receive replacement heating equipment. Renters are ineligible for purchase/replacement of heating equipment.
- Unless they have no heating equipment at all, a household must first be approved for a repair so the vendor can go to the home to determine if the heating equipment can be fixed.
- Leave the purchase/replacement service request pending until the vendor has assessed the equipment under the repair authorization.
- A household can automatically considered and approved for supplemental, if the household meets the eligibility requirements for replacement, even if the customer does not request it on the application.



Vendor Selection

- The household must always select the vendor.
- The local agency must remain impartial.
- Unless the household indicated their preferred vendor on the application, documentation of how the customer selected the vendor should be added to the case narrative.
- Your agency's **Approved Vendor list** can be found in VaCMS under Inquiry / EAP PIPP / Approved Vendors. Then search by your locality and the component (Crisis) to view and sort your list.
- *After* approving/authorizing the service in VaCMS, complete and email or fax the **Notification of eligibility for Crisis Assistance form** to the vendor.

Changing vendors and closing Credit Authorizations



There may be times when the customer needs to change vendors.

- Crisis Assistance does not have a final bill process, like Fuel Assistance does.
- To change the vendor, the first authorization must be closed.
- Credit Authorizations are closed by making a payment or using the 'close without issuance' feature.
- The guide with instructions for closing a Credit Authorization is located on the EAP Training Documents page on FUSION called "**Closing a Credit Authorization 2019**".
- After an authorization is paid or closed, the status will update overnight from Approved to Closed. If the vendor needs to be changed, the service can be registered and approved again, after the status has updated to Closed.

Security Deposit Requests

- To be eligible for a security deposit benefit, the household's security deposit must be needed to:
 - Prevent disconnection of their primary heat
 - Restore service of their primary heat
 - Begin new service of their primary heat
- If the household does not meet one of these non-financial criteria, the agency should document that in the case narrative and deny the request using Program Denial.

Security Deposit Tips

- Contact the vendor to discuss the particulars of the security deposit service request and the current account status. Many things could have happened since the bill was printed, and the service request must be processed with the most up-to-date information.
- When contacting a vendor about the amount of deposit, be sure to ask the right questions to get the information needed.
 - 1) What is the amount of deposit in the disconnection notice?
 - 2) Is the deposit amount found in the disconnection notice just an installation amount or the total deposit due?
 - 3) What is the total amount of deposit still owed on the account?

Security Deposit / Warranty screen

01

There are certain circumstances where a security deposit or warranty needs to be removed from VaCMS.

02

Please review the "Security Deposit & Warranty pages 2019" guide on the EAP Training Document page on FUSION which contains step by step instructions for how to remove the indicators.

03

What situation(s) would it be appropriate to remove a security deposit indicator?



Portable Space Heaters and Emergency Shelter

- A household may be approved for a portable space heater if they are waiting for a repair or replacement of their heating equipment to be completed. The household will need to select a vendor from your agency's approved vendor list. After the space heater is picked up, the vendor will return the Credit Authorization to your agency for the payment to be keyed in VaCMS.
- Your agency may not have an Emergency Shelter vendor in your locality. To deny a request for that reason, from the Crisis Assistance screen, navigate to Program Denial and use the reason 'no vendor for this service type'.

Changes with Fuel and Crisis



Fuel Assistance changes and updates for pre-approved cases before Benefit Determination




Changes and updates after Benefit Determination for Fuel Assistance cases



Final Bill process with Fuel Assistance



Crisis Assistance changes with case processing



Steps for updating prior to Benefit Determination

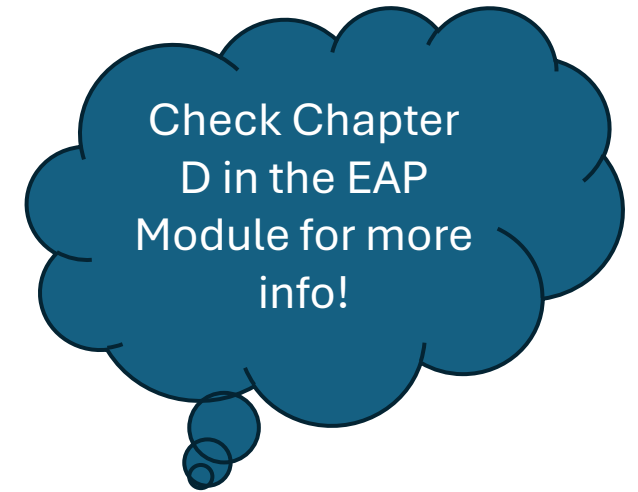
- Locate the correct case in the EAP Inbox and click update application
- Select the Fuel Assistance component page in VaCMS to make any updates (example: vendor and/or heat source change)
- Click update and save/continue to make sure that your data is saved in VaCMS
- Run eligibility and certify your results

*Note: if the pre-approved case needs to be closed (mail returned as undeliverable, only household member is deceased, etc.), then all household members can be updated in the Client Additional Information screen as "Out of the Household". Run eligibility and certify the results to close the case.

Navigating Changes & The Final Bill Process...

Fuel Assistance Changes After Benefit Determination (BD)

- These can include the following types:
 - Household moves out of the locality
 - Household has a vendor change (vendor to vendor)
 - Household has a vendor to direct pay change
 - Primary fuel type after BD
 - The household moves within the same locality and the new residence has a different fuel type
 - An LDSS error occurred
 - A client error occurred



*Note: a change from direct pay to vendor pay after BD is not allowed.

Final Bill Process with Fuel Assistance

- Once changes or updates are made to a Fuel Assistance case after BD, VaCMS initiates the Final Bill process with the initial vendor.
- The 10-day Final Bill letter is generated and sent to the original vendor notifying them that they are no longer the vendor for the case.
- The 10-day period gives the original vendor approved for the case the opportunity to bill the program for any outstanding balance the customer/household may owe.
- The Final Bill process can be shortened, if the local agency requests it and meets certain criteria.
- Helpful guide in EAP FUSION - "Final Bills – Shortening the 10-day Process"

Crisis Assistance – What changes can be made?

- The wrong vendor was approved for the case
- The customer needs a different service type
- The incorrect amount was approved for the service type

Think "case-wide"
Act "service-specific"

Consider all aspects of that particular service request:
Payment line, Client NOA, and Vendor CA/notification, so that all associated actions are completed.

The "Correcting EAP Errors" EAP transaction guide (found in the EAP FUSION Training Documents page) has additional instructions and screenshots for making changes to approved cases.

The Manual Payment Process...

Manual Payment Process


- Manual payments are needed when a payment cannot be processed within the processing timeframe in VaCMS for Fuel and Crisis Assistance
 - This could be discovered from case readings or local case monitoring
 - There may also be cases that are discovered by the LDSS after Benefit Determination or the component processing timeframe.
 - A local agency payment is needed, if it is discovered as an agency error. The LDSS makes a local agency payment, and then requests reimbursement from VDSS for that request.

Required Documents for Manual Payments

- COPE Form
- Matrix Calculation Screenshot (Fuel Assistance requests)
- Copy of local agency payment check (for agency reimbursements)
- W9 form (for direct pay cases)

Additional Tips:

- Notify your consultant with the case number and upload documents into DMIS
- Include a detailed summary in your COPE form
- Include social security number, printed and signed name of client, and address in W9 form



Please include
the case
number in your
email subject
line!

COPE Form Tips:

- Include accurate case information for case name and case number, component, amount paid, and correct benefit.
- Indicate correct fiscal year and component.
- Make sure to sign and date the document.
- Provide a detailed and clear explanation for error and/or payment request.
 - Example: "It was discovered after the Fuel component ended, that an application was not evaluated timely. The household was determined eligible, and a matrix calculation reflected that the client was eligible for \$550 to their Dominion Energy account. A manual payment is being requested for this amount."

COMMONWEALTH OF VIRGINIA DEPARTMENT OF SOCIAL SERVICES
CORRECTION OF PAYMENT ERRORS

LOCALITY []		FIPS CODE []		PROGRAM CATEGORY		
CASE NAME: []		CLIENT ERROR <input type="checkbox"/>		<input type="checkbox"/> FUEL ASSISTANCE		
CASE NUMBER: []		AGENCY ERROR <input type="checkbox"/>		<input type="checkbox"/> CRISIS		
				<input type="checkbox"/> COOLING		
MM/YR/SEASON	AMOUNT PAID	CORRECT BENEFIT	\$ UNDER PAID	LOCAL WAR/DATE	\$ OVER PAID	BALANCE DUE STATE
[]	[]	[]	[]	[]	[]	[]

ERROR DISCOVERED BY: LWA QUALITY ASSURANCE CENTRAL OFFICE

DETAILED EXPLANATION OF ERROR

[]

UNDERPAYMENTS - COPY OF CHECK CORRECTING THE ERROR MUST BE ATTACHED

OVERPAYMENTS - ATTACH REFUND CHECK.

[] _____ [] _____
Signature Of Person Completing Form Date

032-03-0201-09-eng (10/08)

Questions, Comments, Concerns

Hagen Hicks

Hagen.hicks@dss.virginia.gov

(804) 726-7643

EAP Consultant

Northern & ½ Eastern Regions

Sean Nagle

s.nagle@dss.virginia.gov

(804) 971-8248

EAP Consultant

Piedmont & Western Regions

Alex Patterson

Alexandria.patterson1@dss.virginia.gov

(804) 726-7171

EAP Consultant

Central & ½ Eastern Regions

Please make sure you are reaching out to your senior worker/supervisor for guidance prior to reaching out to your consultant

Sandra Spady

Sandra.spady@dss.virginia.gov

(804) 726-7379

EAP Vendor Coordinator

*Please include the VaCMS Case Number in your email