

# Let's Chat About PIPP Changes

*Percentage of Income Payment Program*

BPRO Fall 2024 Conference

# Agenda

VaCMS Releases

PIPP Assistance screen

Processing help

Transaction report

Communication with vendors

Tickets

Eligibility Segments

Enrolled, Not Enrolled, and Case Status

Renewals

# March 2024 Release

## CR847: PIPP Phase II

1. The EAP/PIPP Inbox has been updated with a PIPP Enrollment Status column.
2. EAP/PIPP Application Details screen was enhanced so user cannot enter new PIPP application or change while the prior application is pending enrollment.
3. VaCMS will auto-process the denial, closure, or pending of cases that appear on the Transaction Report because they could not be enrolled by the vendor.
4. VaCMS will auto-close PIPP applications/cases that have pending VCLs with an overdue date.

## June 2024 Release CR854: PIPP (Phase III)

1. Effective June 29, 2024, customers of APCo-AEP may be eligible for PIPP participation.
2. VaCMS will add new living arrangement values for PIPP, “Renter, with electricity included in the rent” (ineligible) and “Renter, with the heat included in the rent” (eligible).
3. VaCMS will update language on the Verification Checklist (VCL) for PIPP applications for “your vendor is unable to enroll your electricity account in PIPP. Please contact your vendor for additional information.”
4. Client Management Reports (State, Local) for PIPP will be generated

# Application Processing

- As a best practice, workers should always thoroughly review the PIPP application prior to processing in VaCMS.
- Staff is strongly encouraged to monitor and utilize the vendor's customer portals to confirm account information prior to processing the case in VaCMS.

## Remember:

- The LDSS determines PIPP Eligibility
- The PIPP vendor determines PIPP Enrollment

Although the case has been processed and approved in VaCMS, the Approval Notice will **NOT** go out to the customer until PIPP has been enrolled on the account.

# PIPP Assistance screen

PIPP ASSISTANCE

PIPP Assistance ? ⓘ ⓘ ⓘ ⓘ ⓘ ⓘ

Application/Case #: 114583082 Case Name: Branch, Olive Program: PIPP Case Status: Pending

New Data + Previous + Continue

PIPP Request

PIPP Application ID: E00105354 PIPP Application Status: Pending

\* Fuel used to Heat Home?: Electricity \* Equipment to Heat Home: Baseboard Heat

\* Living Situation: Homeowner, pays heating

PIPP Assistance

Are you responsible for paying to heat your home? YES Fuel Tank Size (gallons):

Is Fuel delivered to your home?

PIPP Billing Information

Name on the account: Branch, Olive 74F

First: Middle: Last:

\* Account number on the Bill: 4044044044

PIPP Vendor Details

\* Vendor: 900204858 \* Vendor Name: Vanun PIPP

Reset Add

| PIPP Application ID | PIPP Application Type | Fuel Type for PIPP | Vendor Name | PIPP Application Status |
|---------------------|-----------------------|--------------------|-------------|-------------------------|
|---------------------|-----------------------|--------------------|-------------|-------------------------|

- When processing the case in VaCMS, the Billing Information section is for the electricity provider rather than the heating vendor i.e. Washington Gas, Tiger Fuel, etc., which may be different.
- The Electric Provider information should **NOT** be left blank or completed with made-up information like “0s” or 1111111.
- For PIPP eligibility, the name on the electric bill does not have to be the Case Name.

Take a moment to make sure you have entered:

- the correct case number,
  - the correct vendor,
  - the correct account name,
  - the correct account number
- *This is especially important for agencies that have both APCo-AEP and Dominion customers.*

**Reminder:** Be sure to review the customer's account information in the vendor's portal and enter the account name and the account number **EXACTLY** as it appears there!



NOTE: for non-PIPP vendors, the EAP/PIPP Program Denial screen can be used rather than going through all the screens in the EAP/PIPP data collection module.

## EAP/PIPP Income screen

The screenshot displays the 'EAP Income Details' screen for a PIPP case. The case information includes Application/Case #: 190002015, Case Name: McGomicie, Gomicie, Program: PIPP, and Case Status: Pending. The 'Income Information' section contains the following fields:

- Name: McGomicie, Gomicie 28M
- Begin Month: 08 / 2020
- Income Category: Unearned Income
- Employer Name: (empty)
- Pay Received Date: 08 / 01 / 2020
- End Month: (empty)
- Income Type: Supplemental Security In
- Pay Frequency: Monthly
- Gross Pay Amount 1: \$ 783.00
- Gross Pay Amount 2: \$ (empty)
- Gross Pay Amount 3: \$ (empty)
- Gross Pay Amount 4: \$ (empty)
- Gross Pay Amount 5: \$ (empty)
- Monthly Pay Amount: \$ 783.00
- Monthly Pandemic Unemployment Assistance Amount: \$ (empty)
- Pay Verification: Award letter

At the bottom of the form, there are 'Reset' and 'Add' buttons. A purple arrow points to the 'Add' button. Below the form is a table header with columns for Program, Name, Begin Month, End Month, Income Category, Income Type, Employer Name, and Monthly Pay Amount.

Because the customer's PIPP amount is directly income-driven, be very careful when keying the income records for the household.

Pay attention to lines for 2024 and 2025 income records. Do not count the same income twice.

If a customer or household member claims zero income, an income record is not created. Be sure to add case notes to document the methods used to verify the zero income statement (notarized statement, system searches, etc.)



# Processing help is available

## PIPP Guidance Manual

Questions and concerns regarding eligibility (including household composition, income, etc.) should be referred to staff in your agency first (senior worker, supervisor) and then to your PIPP consultant.

## PIPP Procedural Guide

Step-by-Step instructions for common case actions

## PIPP Training in VLC

PIPP page on Fusion has additional training resources

## PIPP Consultant Advice

Asking for help – when received – not using it

Asking for help – when they are not getting a response in a time they want it – they do the opposite or what they think is best

Remember: PIPP is not an emergency payment or benefit program.

1. Add the case # in the email subject line.
2. Include only one case per email. Unless multiple cases have the same issue.
3. When emailing about an ongoing issue, include the original email chain and ticket information, if applicable.
4. Include the exact actions taken.
5. If screenshots are included, be sure to blank out any customer PII.

## PIPP email questions and concerns

# PIPP Transaction Report

After the case is approved and authorized, it is included in the daily demographic file to the PIPP vendor.

The vendor will take one of two actions:

- Enroll the account
- Reject the account

If the PIPP enrollment is rejected, it will be listed on the Transaction Report under Report Search > PIPP reports.

VaCMS will auto-process the Pending or Denial of cases on the Transaction report.

The cases that are placed in a Pending status during the automated process will:

- Display on the Pending by Component Report
- Auto-generate a Verification Checklist (VCL)

**NOTE:** The EAP/PIPP Application ID will also auto-process to Pending or Denied.

## Approvals flipped to Pending

When the PIPP enrollment is rejected by the vendor and the EAP/PIPP Application ID has flipped from Approved to Pending, the following actions can be taken by the worker:

- Process the case through the data collection module.
- Make the necessary updates to the account information on the PIPP Assistance screen
- (re)Run Eligibility.
- Cert/Auth the results.
- The case will go over with the regular daily demographic file.

| Enrollment Transaction Rejects |  |           |
|--------------------------------|--|-----------|
| Reject Codes                   | Description                            | VCL - Y/N |
| 101                            | Account number does not exist          | Y         |
| 105                            | Account name does not match            | Y         |
| 117                            | Customer enrolled with another account | Y         |

**NOTE:** For PIPP, an *update* can be done if the EAP/PIPP Application ID is in a Pending status. A PIPP *change* is sent to the vendor on a different schedule.

| Enrollment Transaction Rejects |  |              |
|--------------------------------|--|--------------|
| Reject Codes                   | Description                            | Denial - Y/N |
| 102                            | Account is inactive                    | Y            |
| 103                            | Account holder flag as deceased        | Y            |
| 106                            | Account number is already enrolled     | Y            |
| 107                            | Account number is not residential      | Y            |
| 108                            | Account number is collective bill      | Y            |
| 109                            | Account number is master meter         | Y            |
| 110                            | Location is not valid (non-VA account) | Y            |

When the PIPP enrollment rejection is a denial/drop code from the vendor, VaCMS will perform the following actions:

- Update the Case Status and EAP/PIPP Application ID to Denied
- Update the PIPP Enrollment status to Not Enrolled
- End-date the EDG-Eligibility/Service Period
- Generate and send a denial notice to the applicant.

PIPP does not currently have a Reinstate function. If a case that has been denied incorrectly and needs to be reprocessed, the following worker actions are required:

- Add/register a new “Apply” EAP/PIPP ID on the EAP/PIPP Application Details page.
  - Use the original application date.
- Process the case through the data collection module.
- Run Eligibility.
- Cert/Auth the results.

# How not to fix a case:

- If a case is in an Approved (and Authorized) status but has not been enrolled by the vendor, re-running EDBC will not “make” it go over to the vendor.
- Creating a new case number will not fix “errors” on the original case.
  - PIPP customers/households should use the same case # throughout the application and enrollment process.
  - If the case is denied for ‘already received the benefit,’ do a deep dive on ALL clients in the HH.

## Communication with PIPP vendors

Contact with the vendor should be limited to account information inquiries that cannot be found on the vendor's customer portal.

- Because the vendors are not familiar with VaCMS functionality:
  - avoid asking the vendor what need to happen in VaCMS to 'send' the case to them.
  - VaCMS instructions offered from the vendor should be referred to the PIPP consultants
- **Do not** ask the PIPP vendor to:
  - Manually enroll/manually un-enroll a client
    - This creates errors for the case in VaCMS and will impact payment of PIPP credits to the customer's electricity account and continued eligibility for the household.
  - Correct PIPP amounts due to errors made by the agency OR due to eligibility time frames.
    - Manual correction of the PIPP amount creates errors for the case in VaCMS and will impact payment of PIPP credits to the customer's electricity account.

# Enrolled, Not Enrolled, and Case Status

Get an idea of what is going on with the case will help you to decide the next steps. Read the story of the household.

If at all you are not sure, reach out to your PIPP Consultants. Especially if you have run the case more than two times and case is still not enrolled.

- ❖ *General quick tip for inquiry of a case if it is listed on either the Transaction Report or Pending By Component Report:*
  - Check the PIPP enrollment status: does it show 'Enrolled', 'Not Enrolled', or is it 'blank',
    - What is the case status,
    - **NOTE:** If the enrollment status is 'Not Enrolled' but case is 'Approved', you will not be able to make any changes to the case.
  - What is the status of the PIPP application id,
  - What does your eligibility summary show,
  - Are there any notices that were generated (check both history and pending).



# Tickets

There may be occasions when VaCMS doesn't provide the anticipated result or doesn't not function as expected.

- First, review the information in data collection for the case to ensure the correct data was keyed for the field,
- Next, confirm that the results are incorrect,
- Triage the issue within your agency,
- Reach out for guidance from the PIPP consultants before submitting ticket,
- Be sure to include the specific actions staff has taken in VaCMS and relevant screenshots,
- Complete and attach the [\*\*VCCC Help Desk Ticket Template for the VaCMS .docx\*\*](#) to the [vccc@vita.virginia.gov](mailto:vccc@vita.virginia.gov) email.

## PIPP Electric Account Number Changes/Updates are **NOT ALLOWED**

Because PIPP enrollment cannot be transferred from one account to another, essentially, account number changes are not allowed for PIPP

The PIPP enrollment on the first account has to be completely closed out in VaCMS and with the PIPP vendor. The VaCMS Case Status must be Closed (or Denied) and the PIPP status must be Not Enrolled.

Remember to check the effective date for the Eligibility/Service Period that is Closed.

Once the enrollment has ended on one account, the customer's application for PIPP on the new account number can be processed in VaCMS just like it's a new application.

Client Request Closure

Account Number/Name and  
Address Change

## Use EAP/PIPP Program Denial

- Go to the left nav and click **EAP/PIPP Program Denial**
- Select PIPP from the Component/Program drop-down
- Select the Denial (closure) Reason
  - Client Request would be the appropriate reason for account number changes because the customer is requesting that PIPP eligibility and enrollment be evaluated for a new electricity account.
- The Denial Date will be pre-populated with the date the case is being processed
  - Include any comments for the case. Language included in the comment box will print on the client notice.

The screenshot shows the 'EAP/PIPP Program Denial' web application interface. The left navigation pane is open, showing a tree view with 'EAP/PIPP Program Denial' selected. The main content area displays the form for creating a denial. The 'Application/Case #' is 114583491, 'Case Name' is Kind, Tayo, 'Program' is PIPP, and 'Case Status' is Approved. The 'Component/Program' dropdown is set to PIPP. The 'Denial Reason' dropdown is set to 'Client Request'. The 'Denial Date' is pre-populated with 12/20/2023. A comment box contains the text: 'PIPP enrollment on account # is now be closed. Submit a new PIPP application for your new electric account.' There are 'Submit', 'Reset', and 'Add' buttons. At the bottom, there is a table with columns: Program Year, Component/Program, EAP Appln ID, Crisis Or Cooling Request Type, Denial Reason, and Denial Date. A red box highlights the instruction: 'To complete the closure, go to the left nav Eligibility > Run Eligibility and cert/auth the closure'.

# Eligibility Segments

## Effective Date of Changes

### Effective begin dates and end dates

Cases with a change in the PIPP Amount and Closures/Denials are sent to the PIPP vendor once a month.

PIPP case changes are impacted by PIPP **Cut-off** which is scheduled for the **25<sup>th</sup> day of the month**.

**Changes** processed after cut-off are considered to be processed the following month. The effective Eligibility/Service period will be the first day of the second month.

**PIPP - Eligibility Summary** ? 📄

Case Name: ██████████ Case #: [128533407](#) Case Action: Case Status: Approved

[Waitlist Communication Form](#)
[Communication Form](#)
[Verification Checklist](#)
[Next](#)

| EDG #      | Program/TOA | Eligibility/Service Period              | Family Unit Size | Client Responsibility Amount | Eligibility Result | Eligibility Status | Eligibility Determination Date | Pending Reasons | Overridden |
|------------|-------------|---|------------------|------------------------------|--------------------|--------------------|--------------------------------|-----------------|------------|
|            |             |   |                  |                              |                    |                    |                                | VCL Other       |            |
| 1046203830 | PIPP        | <a href="#">02/01/2024 - 02/29/2024</a> | 2                | \$ 154.00                    | Approved           | Authorized         | 02/14/2024                     | NA NA           | NO         |
| 1046203830 | PIPP        | <a href="#">03/01/2024 -</a>            | 2                | \$ 154.00                    | Approved           | Authorized         | 02/14/2024                     | NA NA           | NO         |
| 1046203830 | PIPP        | <a href="#">04/01/2024 -</a>            | 2                | \$ 94.00                     | Approved           |                    | 02/27/2024                     | NA NA           | NO         |

[Waitlist Communication Form](#)
[Communication Form](#)
[Verification Checklist](#)
[Next](#)

| Denied in error  | Data entry error<br>Acct Name or Acct Number   | Income errors<br>Incorrect PIPP Amount   | Client Request closures  | Delays in processing                            | Disconnections  |
|--|--|--|--|---|---|
| Case Status must be Denied/Closed  | Case Status must be Approved and PIPP Enrolled.  | Case Status must be Approved and PIPP Enrolled.  | Case Status must be Approved and PIPP Enrolled.  | Approved but Not Enrolled not display           | Explain the Program, PIPP isn't a benefit program – it's a payment - billing plan |
| Add/Register a new PIPP Application  | Add/Register a "Change" PIPP Application   | Add/Register a "Change" PIPP Application   | Add/Register a "Change" PIPP Application   | Ensure case has been approved and authorized    | Refer to Dominion to request extension  |
| Process through data collection  | Process through data collection  | Process through data collection  | Use EAP/PIPP Program Denial with "Client Request"  | Confirm Case Status                             | Refer to Community Resources  |
| Run EDBC   | Make correction to the appropriate field(s)  | Make correction to the appropriate field(s)  | Run EDBC from the left nav – Eligibility > Run Eligibility                                 | Review the effective date of Eligibility Period |   |
| Cert/Auth the results  | Run EDBC   | Run EDBC   | Cert/Auth the Eligibility results  | Contact Consultant                              |   |
| Sent to Dominion according to the Eligibility/Service Period effective date for the change | Cert/Auth the Eligibility results  | Cert/Auth the Eligibility results  | Sent to Dominion according to the Eligibility/Service Period effective date for the change |   |   |
|  | Sent to Dominion according to the Eligibility/Service Period effective date for the change | Sent to Dominion according to the Eligibility/Service Period effective date for the change |  |   |   |

# When Things Go Sideways

# Renewals

Eligibility for continued PIPP participation must be renewed at least annually. A PIPP Renewal will be generated and sent to active Approved/Enrolled PIPP customers 60 days prior to the Renewal date for the case.

Training for PIPP Renewals will be scheduled in the next couple of months. Basically, renewals for PIPP will be handled like the renewals for other programs.

- There are no automatic renewals.
- Customer must submit a new application.
- LDSS staff will process the PIPP renewal in VaCMS with the PIPP application type of Case Change/Closure even if no information for the household has changed.
- Eligibility will be determined for the renewal, and a file will be sent over to the vendor.
- The PIPP vendor will review the renewal request and send back a file with the updated/new PIPP Enrollment renewal date for the case.

# Questions, Comments, Concerns



Questions can be submitted to the PIPP Consultants by email.

**Kisha Owens**

[Nakisha.Owens@dss.virginia.gov](mailto:Nakisha.Owens@dss.virginia.gov)

(804) 922-3305

**Angela Ector**

[Angela.C.Ector@dss.virginia.gov](mailto:Angela.C.Ector@dss.virginia.gov)

(804) 726-7392

## Helpful information to include in your email:

- ✓ Your agency name and your direct phone number, if it's not in your email signature
- ✓ Please complete the subject line and include the case # when sending an email