



VIRGINIA DEPARTMENT OF
SOCIAL SERVICES

Walking in an EAP Spider Web: Rushmore, Reports, and Reviews

BPRO Fall 2025

Agenda

- Rushmore Basics and Reminders
- Navigating through Rushmore for Case Readings
- The Sub-Recipient Monitoring Review in Rushmore
- Generating and Utilizing Rushmore Reports
- Utilizing VaCMS Reports for EAP Components

Rushmore Basics



Introductory Checklist

- Make sure caseworkers have logged in to Rushmore using their LDAP username and password
- Supervisors – when completing a case reading in Rushmore, make sure caseworker/supervisor information is correct. If it needs to be updated, submit a SAMS form with the correct information.
- Review the Rushmore User Guide for additional instructions
- Review the recent Rushmore trainings in FUSION

Accessing and Logging into Rushmore



- Rushmore can be located via FUSION and accessed by the Quick Links tab at the top under category Applications
- Log in using LDAP username and password
- Save Rushmore application to favorites bar

A screenshot of a login form titled "Please Log On:". It contains two input fields: "Enter User ID:" and "Password:". An orange arrow points to the "Enter User ID:" field from the right. Below the input fields is a button labeled "OK".

Key Reminders with Using Rushmore

Make sure your information for the case in VaCMS is accurate with the case name, case number, etc.

VaCMS does not “talk” with Rushmore and populate information.

Entering the caseworker’s last name will generate the name and LDAP user ID, if they have accessed Rushmore before. Be mindful to check that the correct caseworker and LDAP ID are accurate.

The Edit button at the bottom allows you to add and update information on each tab, including the Main Review tab with the case information for the case reading.

If you make any errors or are new to Rushmore and want to practice, case readings can always be completed and deleted on the Main Review tab for the case reading.

Navigating Through Rushmore



Utilizing Menu Tabs in Rushmore

Main Review Tab – Enter/review main case information, component information, and agency caseworker/supervisor information

Review Elements Tab – Enter/review all elements or topics reviewed with the case reading

Program Specific/Other Tab - Enter/review benefit amount approved and/or authorized and any possible overpayment information. Additionally, this section can also be used to document eligibility or benefit errors identified outside of the Review Month or errors that are beyond the scope of the review type.

Review Action Tab – Access case reading comments, submit a rebuttal, and view deadlines for updating the case reading.

****Reminder**** - After the caseworker/agency reviews the case reading, the "Case Corrected" box must be checked for the case reading to be updated and completed.

The screenshot shows a horizontal navigation bar with the following elements from left to right: a 'Re-Assign Reviewer' button, a 'Main Review' tab (highlighted with a red box), a 'Review Elements' tab (highlighted with a red box), a 'Program Specific/Other' tab (highlighted with a red box), and a 'Review Action' tab (highlighted with a red box). Above the tabs, the text 'Enter Case Review' is on the left, 'Review ID: 192018' is in the center, and 'Review Date: 7/30/2025' is on the right.

Enter Case Review		Review ID: 192093	Review Date: 7/30/2025
Main Review	Review Elements	Program Specific/Other	Review Action
Reviewer <input checked="" type="checkbox"/> Validate For Batch 07/30/2025 <input checked="" type="checkbox"/> Reviewer Signature 08/01/2025		Response Response Received ▾ Rebuttal Due 8/8/2025 Correction Due 8/13/2025	
Supervisor <input type="checkbox"/> Rebuttal <input type="checkbox"/> Extension Requested		<input checked="" type="checkbox"/> Case Corrected 08/20/2025	
<input checked="" type="checkbox"/> Review Completed 08/20/2025			
Comments Add Edit Delete			



Make sure to check the Case Corrected box, once case reading is reviewed and corrected.



Additional Reminders

- Information is provided on the deadline to update/correct any findings from a case reading in Rushmore
- A rebuttal can be submitted, if you are not in agreement with the case reading outcome and/or findings.
- Comments/feedback can be entered on the Review Action tab for the case reading. This may include information not provided in the Case Narrative that needs clarification or updates with any findings discovered.
- The Edit button at the bottom will allow access in each tab to update and provide comments in the Review Action tab
- After the case reading is completed and there are findings, upon request, any missing documents from DMIS should be uploaded and any case documentation should be entered in the Case Narrative section of VaCMS for the case.

Sub-Recipient Monitoring Review with Rushmore



What is the Sub-Recipient Monitoring Review?

The purpose of the SRM is to ensure that federal and/or state funding is being used for the correct purpose and in compliance with Federal and State laws and regulations.

VDSS used program eligibility requirements as the compliance measure to test the accuracy through these case readings from the SRM review.

Your SRM case readings are completed by an EAP Consultant, but not your specific Regional Consultant. The case reading results are discussed with your Regional Consultant, and this is to ensure consistency with case reading findings, along with EAP information that we relay to all of our LDSS agencies.

The Sub-Recipient Monitoring Review is conducted every three years for agencies.

The case numbers and ID requests reviewed are selected through an EAP Sample Report in VaCMS that selects case numbers and ID requests at random for the selected component time period.



Housekeeping Items in Rushmore

- » The EAP consultant will contact your agency, ahead of the Sub-Recipient Monitoring Review (SRM), reminding to have EAP caseworkers access Rushmore, uploaded case-related documents like paper applications, manual notices, and verification items.
- » The caseworker listed on the Main Review tab should have access to update the case reading in Rushmore, but if there are issues, the EAP supervisor should be able to make any necessary updates.
- » Once the case readings are completed, the EAP consultant will contact your agency with the case numbers and request ID's reviewed, allowing access to view any findings and review any comments from the review.
- » A virtual debrief meeting will be scheduled, which will include the EAP team member, LDSS agency director, along with your EAP Regional Consultant and Program Manager.

Common Findings with the SRM

Findings

- Missing documentation in the Case Narrative
- Missing applications in DMIS
- Unverified income entered in VaCMS
- Populated unearned income entered incorrectly
- Fuel Assistance benefit not exhausted, prior to Crisis Assistance approval
- Missing Credit Authorization forms in DMIS

Resolutions

- Document information such as vendor selection, account disconnection status, exhaustion of Fuel Assistance benefit, etc.
- Upload appropriate documents such as applications, credit authorization forms, manual notices, etc. Into DMIS and have a scanning procedure in place for your agency.
- Use New Data, when possible, to populate income. Active Public Assistance income can be used as a verification source. If income entered differs from active Public Assistance income at the time of application processing, include documentation in the Case Narrative, if System Inquiry is used as a verification source.
- When populating SSA/SSI income, make sure to only include the most current month/year and gross amount. The older year amounts can be deleted, after populating the data for the income being entered.

Connecting Your Case with Documentation

Helpful documentation in the Case Narrative includes...

- ✓ Online application T numbers
- ✓ Client vendor selection
- ✓ Exhaustion of Fuel Assistance benefit for Crisis Assistance requests
- ✓ Disconnection amounts and information
- ✓ Confirming information entered in VaCMS, but not declared on the application
- ✓ Actions taken with vendors for repair and replacement requests
- ✓ Correspondence to a vendor related to updates with requests
- ✓ Information entered in real time, after discussions with clients and vendors

Generating Rushmore Reports

With the SRM, there are three reports generated from the case reading results, which include the following below:

- **Case Review** – provides the case reading information from specific search criteria and date range that includes the case name, case number, correct or incorrect status, etc.
- **Accuracy Summary** – provides information on accuracy rate for the case readings from the date range selected, including dollar amounts from benefits authorized correctly or incorrectly
- **Causal Factor** – outlines any findings, positive or negative, that were indicated in the case reading

Tip: After completing case readings with your EAP team, you can utilize the reports to relay information and statistics to your staff.

Generating Rushmore Reports...

NAGLE, SEAN **Case Review(Eligibility) v 5.3.2** Monday, September 8, 2025 [User Guide](#)

Case Review Menu:

Reports

Select a report:

- Accuracy Summary
- Accuracy Trend
- Case Reviews
- Causal Factor Summary
- Correction Accuracy
- Correction Timeliness
- Element Overview
- Element Overview Trend
- Element Summary
- Program Count Summary
- Re-Review Accuracy Summary
- Re-Review Element Overview
- Response Due Summary
- Reviewer Case Count
- Reviewer Case Status
- Unsubmitted Reviews
- Element Comments

Filter (* indicates required) To select/enter criteria, click on filter button(s)

Review Date	
Region	
Locality	
Display Groups	Yes
Supervisor	
Worker	
Program*	
Medicaid Group	
Category	
Reviewer Type	
Review Month	
Review Classes	
Review Types	
Program Status	
Breakdown Medicaid Groups	Yes

Report Description

Summarizes the total number of reviews completed and the number and percentage of those cases that have an overall status of Incorrect or Correct. The summary provided is based on the management level selected in the criteria.

Accessing Report Statistics

Case Review (v 5.3) Date Printed: 8/14/2025 2:42:18 PM (sm4900)

Accuracy Summary: Energy Assistance

From Review Date: 08/01/2025 **To:** 08/14/2025

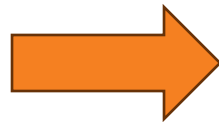
Report Description: Summarizes the total number of reviews completed and the number and percentage of those cases that have an overall status of Incorrect or Correct. The summary provided is based on the management level selected in the criteria.

Selected Criteria

Locality: ██████████ **Display Groups:** No
Program: Energy Assistance **Review Month:** From: 08/2025 To: 08/2025
Reviewer Type: Case Reader, Consultant, State Level Case Reader
Review Classes: Probationary, Regular
Review Types: Cooling Approval, Cooling Closure, Cooling Denial, Crisis Approval, Crisis Closure, Crisis Denial, Fuel Approval, Fuel Closure, Fuel Denial, Energy Assistance

EASTERN
Prince George

Name	Total	Total Incorrect	Total Correct	Accuracy Rate	Dollar Cases	Dollars	Dollars Incorrect	Accuracy Rate	Total Invalid	Total Valid	Validity Rate
██████████	10	0	10	100%	9	\$3,955	50	100%	0	1	100%



Case Review (v 5.3.2) Date Printed: 9/10/2025 3:53:47 PM (sm4900)

Accuracy Summary: Energy Assistance

Row: ██████████
Column: Total

Review ID	Case Number	Date Entered	Worker	Element Error	Dollar Difference	Validity
193090	116600203	8/6/2025	██████████	No	--	Valid
193231	118665589	8/7/2025	██████████	No	\$0	n/a
193242	115837998	8/7/2025	██████████	No	\$0	n/a
193247	115847242	8/7/2025	██████████	No	\$0	n/a
193304	117022333	8/8/2025	██████████	No	\$0	n/a
193313	115743429	8/8/2025	██████████	No	\$0	n/a
193323	115780483	8/8/2025	██████████	No	\$0	n/a
193329	129509682	8/8/2025	██████████	No	\$0	n/a
193334	130783693	8/8/2025	██████████	No	\$0	n/a
194016	116058301	8/14/2025	██████████	No	\$0	n/a
Total Records: 10						

Energy Assistance (EAP) Reports

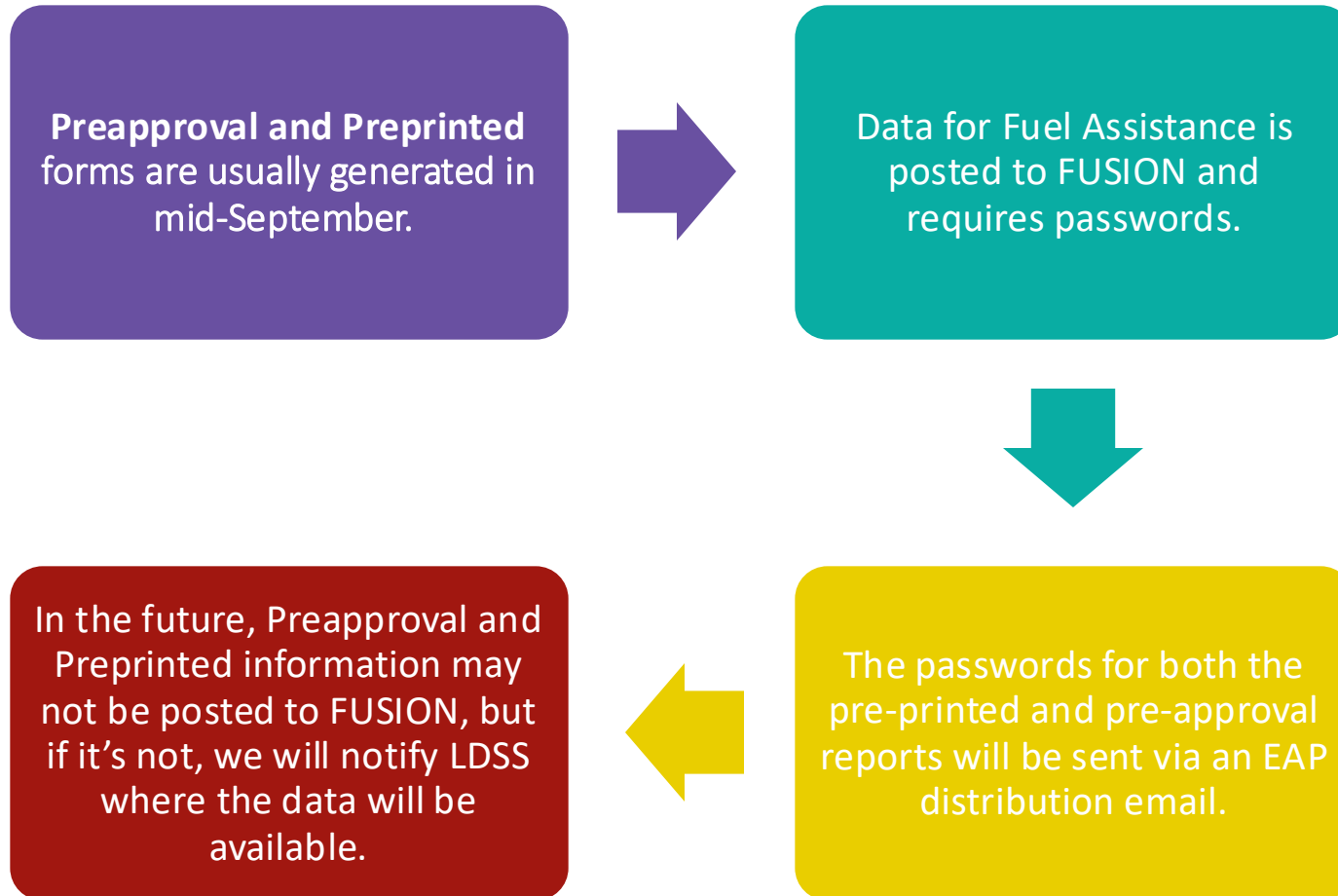
For every EAP component
- Fuel, Crisis, and Cooling
Assistance, there are
various reports available.





Reports for Fuel Assistance Pre-approvals and Cooling Assistance Pre-approvals

Fuel Assistance Preprinted Applications and Preapproval Notices



Cooling Assistance

Pre-approval Reports

RP -197 – EAP Cooling Evaluation Letter Report

This report lists the households who were mailed an evaluation letter, notifying them that they are being evaluated for potential eligibility for Cooling Assistance (electric bill payment). These letters are usually sent to households in mid-May.

****Reports related to the Cooling Assistance preapproval process are found in Reports Search / EAP in VaCMS****

Cooling Assistance Pre-approval Reports (continued...)

RP -162 Cooling Preapproval/Pending VCL Report -

This report is available yearly after the preapproval process run. The date will be provided annually. The report shows households who were successfully preapproved for Cooling Assistance payment of electric bill. It also displays cases that are pending worker action that were unable to be preapproved but were also not denied. Workers should review the cases and process those that were left pending within 15 days.

RP -198 – EAP Cooling Denial / Exception Report -

This report shows households who were not preapproved. You can view this report to see the code or reason why a household was denied or excluded from the preapproval process.

Note: If a household was denied due to a missing/incorrect disability verification code or an incorrect living situation, you can correct the information in the VaCMS, document the case narrative, and reevaluate it without the household having to reapply.

Pending by Component Report

The pending by component report is used in all EAP components - Fuel, Crisis, and Cooling Assistance.

This report is used so staff can track which applications are pending, to know what needs to be processed, and can sort the cases from oldest to newest and by worker ID.

The report is available in two forms:

- There is a daily report found in Reports Search, RP-070.
- There is also a sortable list version, located in VaCMS under Inquiry / EAP/PIPP. Select your locality and the EAP Component and click search to find pending applications and sort by various categories such as days pending. This version updates in real-time as applications are processed!

Client Management Report – Local
RP-077 B

Who has used the CMR-Local report?

- **Helpful for and available for ALL EAP Components!**
- Fuel and Crisis - On the CMR – Local report, the Fuel and Crisis components are on the same report.
- The summary of the Fuel component is first, then each individual case is listed, followed by Crisis data.
- If the Crisis component has not yet started, only Fuel data will be listed.
- The CMR-Local report also runs during the Cooling component, with the summary of all cases first, followed by each individual case.
- The report is cumulative and is in PDF format.
- There is also a CMR-State report available for statewide data.

Unpaid by Component Report – RP-069

RP-069 is mostly used during the Crisis and Cooling components and is located in VaCMS under Reports Search / EAP.

For the Cooling and Crisis component, this report needs to be monitored to ensure that Credit Authorizations are being paid timely in VaCMS for approved cases. After local agency staff approve certain services, they must follow up with vendors to ensure the service(s) has been performed and the vendors are returning completed Credit Authorizations/CA's and itemized invoices, receipts, documenting in the EAP case narrative regarding vendor correspondence.

Workers input/pay the CA's in VaCMS under Benefit Issuance / EAP Credit Authorization.

The Unpaid by Component report will show approved Fuel Assistance cases where no payments have been made at all. If just one payment has been made on a Fuel Assistance case (but the full Fuel benefit is not necessarily exhausted) the case will not be displayed on the report. Although local agencies do not key Fuel Assistance payments, they may view this report to see which Fuel cases have had no payments made on them.

Fuel payments are made from the VDSS Home Office.

LIHEAP Effectiveness Reports (Fuel – RP-66A and Crisis and Cooling - RP-66B)

These reports generate at the end of the components and show the number of households approved within certain poverty thresholds, total number of households paid, total amount paid, funds returned, households with more than one benefit, extra dollars (used) and excess income per locality.

This includes useful information and statistics for LDSS Board Meeting and EAP preparation for future components. You can look at data to determine staffing needs.



Knowledge Check



You're wrapping up the Crisis component and need to know which Credit Authorizations are outstanding and need payment.

Which report do you use to find this information?

- a. Pending by Component
- b. Unpaid by Component
- c. Client Management Report - Local

Where would you find this report?

Thank you for attending!

What did you learn today?

Questions?

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