Energy Assistance Program

Sub-recipient Monitoring

Common Findings and Best Practices

Application Evaluation

Benefit Program staff uses VaCMS during application evaluation.

Evaluate at the case level, process at the service request level

Energy staff can add and approve multiple service requests in VaCMS, but there are many factors to consider:

- During Cooling, there is no system edit to prevent an installation of an a/c unit and a self pick-up of a unit during the same EDBC run.

- Cooling Assistance can only provide one air-conditioner unit during the component.

Timeliness

- Applications that are faxed and time-stamped anytime on the last day of the application period must be processed as received timely. CH., A, pg. 5
  - CommonHelp applications submitted after 5 p.m. the last day of the application period populate with the next business day. If the application was received before Midnight on the deadline, it would be considered received as timely.
- We're working with the tech team on Energy applications submitted through CommonHelp (CH).
- For now, CH applications that populate the next business day/outside the application period should be denied, and then re-processed like a paper application.

Case management

- Each type of assistance requested on the application must be evaluated for eligibility.
- The customer should be contacted, if there is a discrepancy between the type of assistance requested and the type of assistance needed.
  - For example, if the customer selects repair on the application and attaches an electric bill with a disconnection.
- There is no need to print VaCMS screenshots or documents scanned into DMIS.

Common Findings during case readings

- Below are a few common findings to consider:
  - Date stamp on application does not match what is entered into VaCMS.
  - The Additional Client Details screen isn't coded when there are disabled household members.
  - Household members are paying the Medicare Part B and D Premiums out of pocket and it isn't reflected in VaCMS.
  - Documentation or clarification is written on Post It notes or utility bills, rather than using Case Comments or Page Comments.

Best Practices

In-House Training

EAP refresher training should be taken prior to the beginning of each component.

- Classroom training is very basic and should be reserved for workers that have no prior EAP VaCMS experience.
- Many training tools and component specific materials are available.
  - VaCMS training environment
  - Virginia Learning Center online training modules
  - EAP page on Fusion
  - Helpful Hints
  - FAQ's and 101's

Customer service is key

- Refer to other programs and services in the locality (such as EnergyShare , 2-1-1 Virginia, and Weatherization)
- Use colored paper for applications to distinguish the different components.
- Return customer calls promptly.
- Process applications/second electric bills chronologically by the date received/submitted.

Working with Vendors

- Workers should develop an ongoing relationship with vendor in their locality.
- Consider hosting a meet and greet with established and new/potential vendors.
- If possible, reach out to vendors prior to the component to determine the EAP point of contact.

Comments
Concerns
Compliments