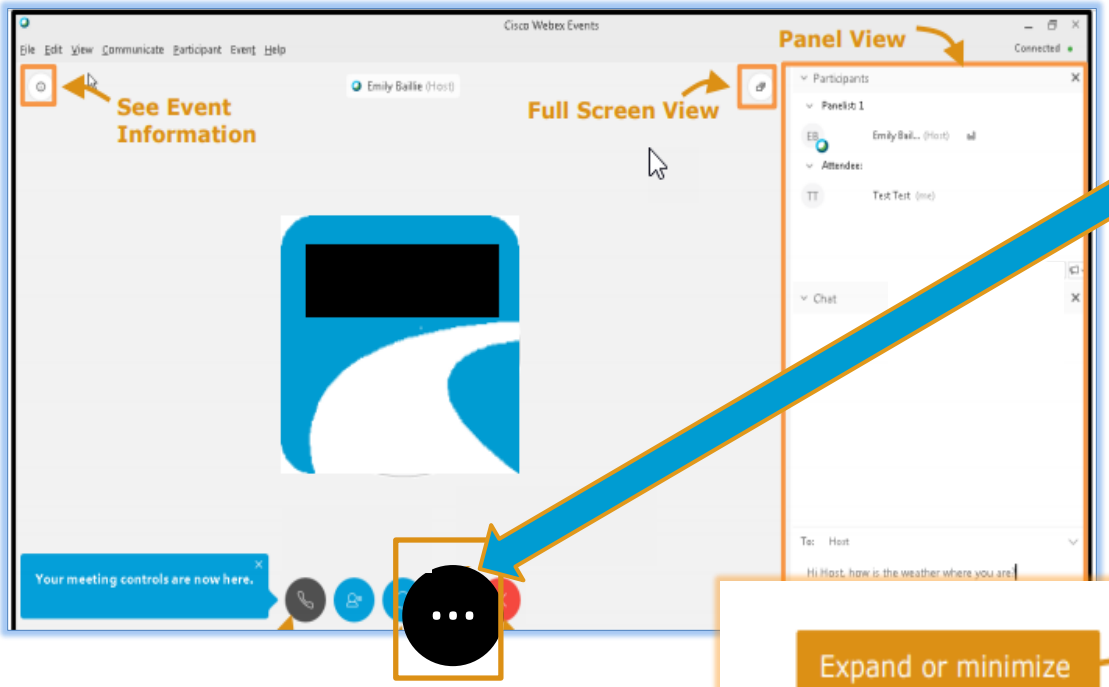
WebEx Event Attendee Quick Guide

- Attendees will not be able to unmute themselves
- **Please use the Q & A feature to ask questions**



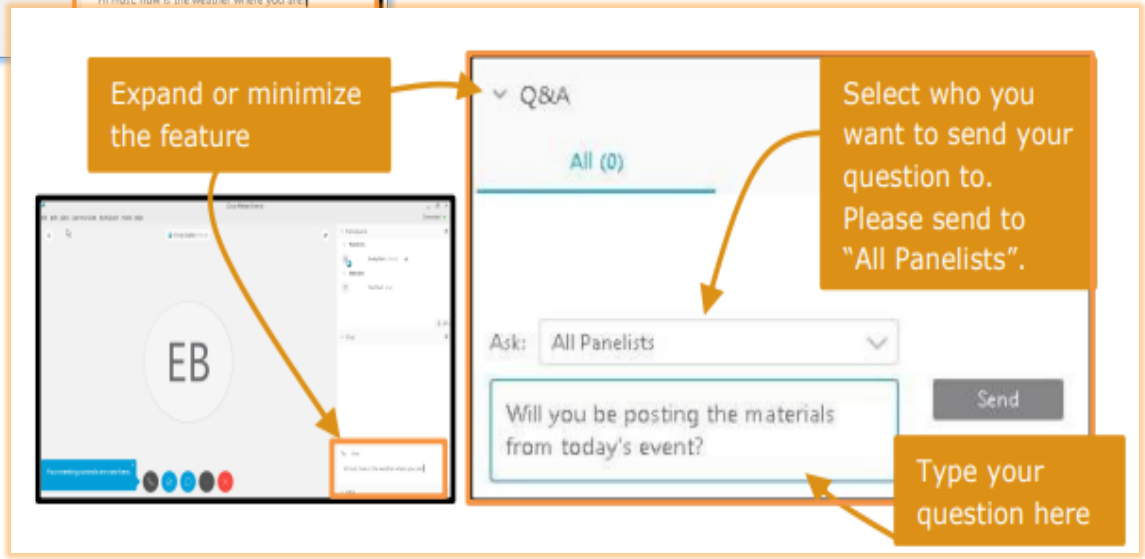
To display the Q&A feature:

- **Click the <u>More Options</u> bubble**

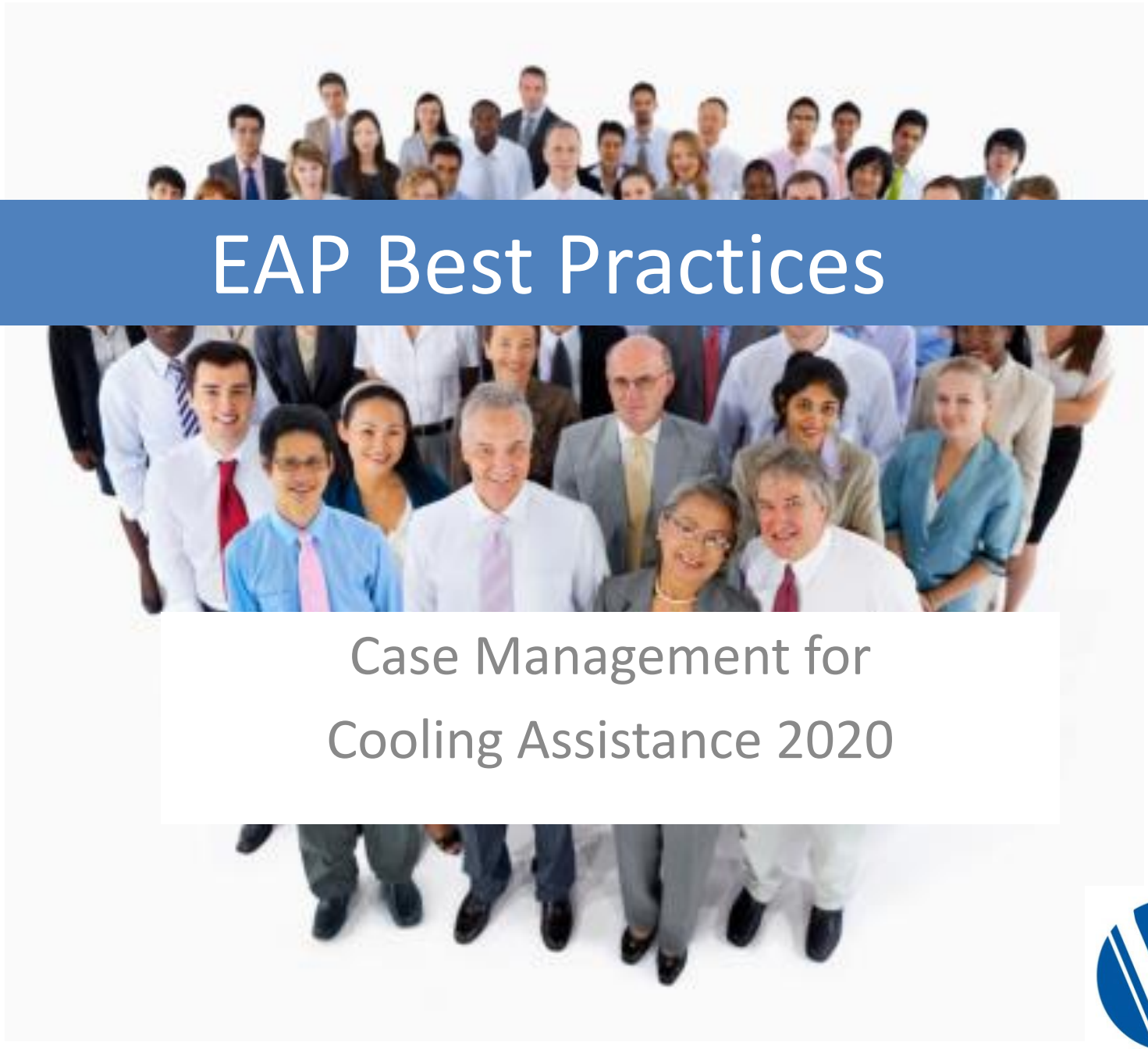
  (enlarged to show detail)
- **Then click the Q&A bubble icon**

The chat feature is not monitored for participant questions during virtual training events.

Q&A: In the Q&A box on the right-hand panel view, send your question to "All Panelists" and specify who you are.



EAP Best Practices



Case Management for

Cooling Assistance 2020

Agenda

- Processing every electric bill payment request for the entire maximum benefit amount of $300.
- Allowing a credit on an electric bill account
- No co-pay requirement for disconnections
- Timely processing of Cooling requests
- Common vendor and customer-service concerns will be reviewed.
- Open Forum / Question and Answer session to discuss any concerns or issues.

New for 2020

Electric Bill requests

Process Cooling Assistance payment of the electric bill for the maximum benefit amount ($300.00) regardless of the amount owed on the account.

The vendor will apply the benefit to the customer's account, even if it causes a credit.

If the customer submits a subsequent electric bill for payment during the component, the service request should be added to the case and processed through VaCMS.

- The subsequent request will be denied with "Already received maximum benefit for this type of assistance."

When entering a subsequent bill request in VaCMS, add it as a brand new service request using the date that the customer submitted the bill as the new application date.

Processing electric bill payments

4

On the Cert/Auth page, a comment could be added:

New for 2020

"Your application/case has been approved for the maximum benefit for electric bill payment this season. No additional funding is available for electric bill payments through Cooling Assistance this year. New electric bills do not need to be submitted.

If needed, please contact the following community resources that may have benefits available: such as dialing 2-1-1 and visiting AuntBertha.com."

Incorrect Denial Reason: "Difference between Service Request and Maximum benefit has not been paid."

Several tickets have been submitted for the incorrect denial reason being given when processing electric bill payment requests on cases that have been previously approved, the incorrect denial reason. The tech team is working to quickly resolve this issue. In the meantime, workers may add a comment to the notice on the cert/auth page with the correct denial reason "already received maximum benefit for the service type".

Processing electric bill payments

A total of 11 vendors are Credit Authorization Bypass (CAB) vendors for Cooling 2020.

Payments to CAB vendors are processed automatically by VaCMS after the service request has been authorized. The payment line will display as "Pending Issuance" under the **EAP Credit Authorization** screen. No additional payment actions are required for CAB vendor payments.

Vendor #	Vendor Name	Contact information
900100235	Central Virginia Electric Cooperative	jyancey@mycvec.com
900100430	City of Danville	scottjb@ci.danville.va.us
900100148	Community Electric Cooperative	bmansfield@comelec.coop
900101014	Craig Botetourt Electric Cooperative	betty@cbec.coop
900100040	Prince George Electric Cooperative	codonnell@pgec.coop
900100018	Rappahannock Electric Cooperative	vjohnson@myrec.coop
900100398	Shenandoah Valley Electric Cooperative	tmullins@svec.coop
900100393	Southside Electric Cooperative	kyle.rainwater@sec.coop
900100392	Dominion Energy	eao@domenergy.com
900100394	American Electric Power	(304) 562-4551
900100403	Mecklenburg Electric Co-operative	(434) 372-6212

Processing electric bill payments

New for 2020

After the electric bill payment approval is authorized for a non-CAB vendor, the worker will immediately key payment for the maximum benefit under the **EAP Credit Authorization** screen rather than waiting for the completed electric bill payment to be returned.

- Unpaid service requests will display on the Report Search > EAP > EAP Unpaid Report until the payment has been keyed and the check has been issued.
- The paper credit authorization is generated by the system and mailed to the vendor for their records.

All other service types (equipment-related requests and non-security deposit option (SDOP) deposits require the fully-executed CA (and itemized bill for equipment/repair) to be returned prior to the payment being keyed in the system.

Subsequent Electric bills

As a customer courtesy, a new application is not required if an additional electric bill payment is needed after initial application for that service request (EAP Manual, VOLUME IX, CHAPTER J, PAGE 1). However, a subsequent electric bill should be treated as a new request for assistance and processed through the EAP Module.

Because the maximum benefit for electric bill payments are being paid at initial application this year, when subsequent electric bills are submitted, the request should be registered and processed through the EAP Module and a denial notice will be generated.

On the Cert/Auth page, a comment could be added:

> "Your application/case was previously approved for the maximum benefit for electric bill payment this season. No additional funding is available for electric bill payments through Cooling Assistance this year. New electric bills do not need to be submitted.
>
> If needed, please contact the following community resources that may have benefits available: such as dialing 2-1-1 and visiting AuntBertha.com."

Copay Requirements Waived

New for 2020

Let's say our customer has a disconnection amount that is higher than the maximum benefit amount that can be paid for electric bills.

- Due to the pandemic, the case will be processed for the maximum benefit for electric bill payments.

Even if the electric company is disconnecting due to non-payment, the co-payment requirement has been waived for Cooling 2020

Vendor payment review

Take a moment to make sure you have entered:

- the correct case number,
- the correct vendor,
- the correct account name,
- the correct account number,
- the correct amount.

Security Deposit information

- Security deposit may only be paid if included in the active disconnection status of the account or needed to start or reconnect service.
  - Always consider the total amount of deposit owed on the account – not just an installment amount.
  - Applicants that have no physical address may be able to receive help with security deposit to get cooling started at their new address.

❖ If the total security deposit is higher than the maximum benefit $200, a co-payment may be required by the electric company.

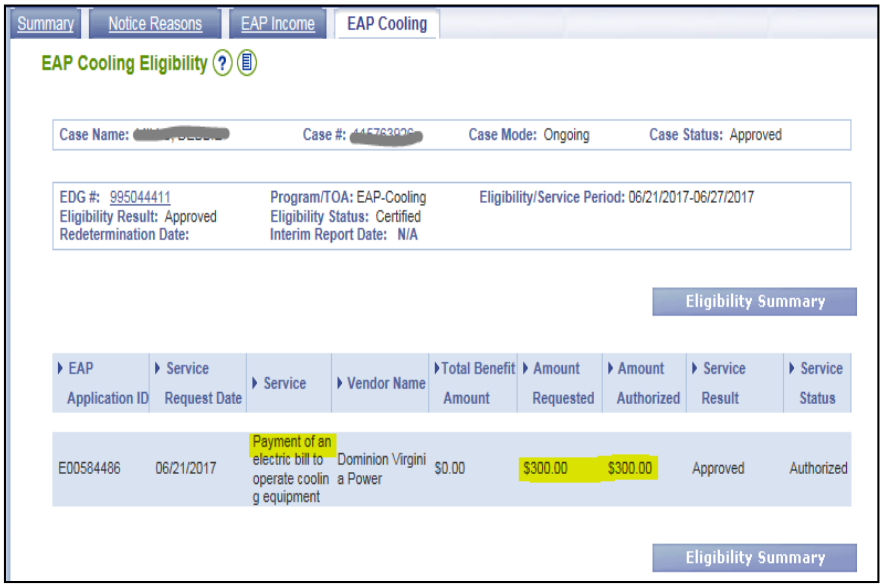
- When processing a security deposit credit authorization (CA) and making a payment in Benefit Issuance, enter any co-payment that was made in the Other Paid Amount fields. As mentioned, it is unlikely that a co-pay would be required for any of your requests.

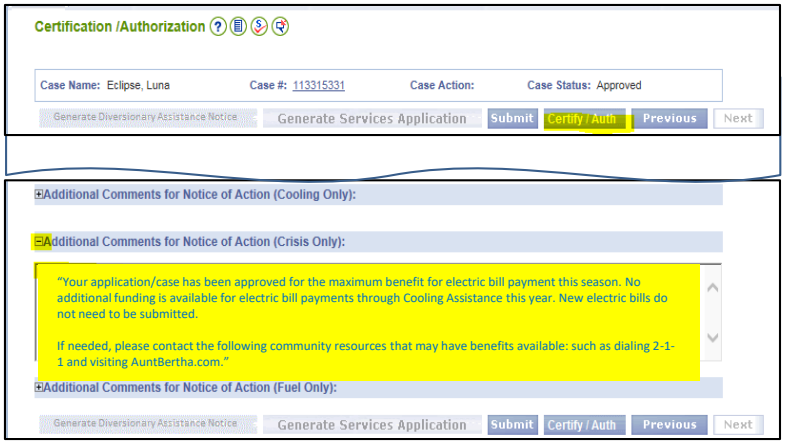
If the customer had received deposit help for their electricity from EAP in the past the request will be denied. Refer the customer to other community resources that may help with a security deposit.

Reviewing Eligibility Summary Tabs

Click the Eligibility/Service Period hyperlink to review the eligibility for the case.

- Click on the Summary tab to review household member detail.
- The Notice Reasons tab will display the denial/closure reason for the service request.
  - Be sure to review that the correct denial reason is displayed.
- The EAP Income tab will show the income used/calculated for the service request.
- Use the EAP component tab to review the service request that was processed, the vendor, and the benefit amount.





General Information

The LDSS cannot ask for more from the customer than EAP policy requires.

- Face to face interviews are not required for EAP.
- Home visits are not required, but can be done.
  - They are time consuming and use agency resources.
  - Possibly dangerous and outside of the scope of training for most Energy Assistance staff.

Processing Tips

- If household received Fuel/Crisis and a Significant Change has not occurred, there is no need to re-verify income.
- Process applications in the order received.
  - The goal is to enter all applications into VaCMS so that it is at least pending. We know that it may difficult to enter applications into VaCMS by the Friday of the week when the component begins.
  - If the application is at least pending in the EAP Inbox, it is captured on reports and can be tracked.
- For electric bill payments, key the maximum benefit amount in the Service Request Amount field.
- Remember to key payments for non-CAB vendors immediately after the electric bill request has been authorized.

Processing Tips

- Do not fax Cooling Credit Authorizations (CAs) to vendors unless directed to do so by the Home Office.
  - For example, at the end of the component or the vendor states the original CA has been lost, etc.
- As a Best Practice review the following reports at least weekly throughout the component and more frequently after the end of the application period:
  - Pending By Component Report
  - Unpaid Reports
  - Client Management Report

DMIS Scanning

Develop best practices for your agency to scan documents into DMIS.

- Use the link below to review a list on Fusion of the required documents.

https://fusion.dss.virginia.gov/Portals/[DIS]/Files/Documents_Required_to_be_Scanned_for_DMIS_-_MASTER_LIST_-_8_24_17.pdf?ver=2018-12-04-144846-543

When scanning:

- Batch each request's paperwork.
- Consider how it is titled in DMIS, so it can be easily located.
- Determine a schedule for scanning, perhaps within 30 days of the end of the component, or devise a schedule that would work within your agency's guidelines.
- If a copy of the electric bill will not be scanned into DMIS, please document how the account information was verified in case comments.
  - Too often we've seen second/third bills processed with no bill and no documentation how the worker knew to pay a subsequent bill.

Please don't scan VaCMS or SPIDeR screenprints.

Vendor Matters

- Consider attaching a list of the approved vendors in your locality to the application packet is mailing to customers.
  - On the flip side of the approved vendors list could be a list of Community Resource numbers.
  - The list of approved vendors is located in VaCMS, under Inquiry > EAP > EAP Approved Vendors.
- CAs are not interchangeable.
  - For example, a credit authorization for vendor installation of a window air-conditioner cannot be used for self pick-up of a window air-conditioner.
- If there is no vendor in your area that provides the service requested, please contact Sandra Spady. (804) 726-7379, sandra.spady@dss.virginia.gov

Vendor Matters

- Due to the global health emergency, there may be vendors that are not providing in-home services for repair and installations.
  - As a best practice, contact the vendors in your locality to discuss the COVID-19 measures they are taking
- Vendors usually order a specific amount of window a/c units that they anticipate will be needed/sold during the summer.
  - If a vendor tells you that they have run out of window a/c units for approved households, please notify your regional consultant.
  - The household will be allowed to select a different vendor that has window a/c units available.

What do you need to do?

There's a transaction guide for that:

- EAP Documentation Guide
- Closing a Credit Authorization 2019
- Correcting EAP Errors 2019
- Security Deposit & Warranty Pages 2019
- Using EAP Program Denial 2019
- Using the EAP Unpaid Report 2019

Additional Cooling training materials available on the EAP Fusion Page:

- New Worker and Cooling Refresher training presentation
- The EAP Manual,
- Helpful Hints newsletter,
- FAQs, 101s, Q&A
- Supervisors Timeline, and
- Implementation Schedule

What should you do when questions arise?

- Look in the EAP Manual
- Review Cooling 101, Cooling FAQ, and Q&As.
- Look for an EAP Transaction Guide on the subject on the EAP Fusion page.
- New Worker training sessions
- Cooling Refresher training
- EAP Documentation Guide
- Check past issues of the Helpful Hints, which are found on the EAP FUSION page.
- Ask a co-worker or supervisor with EAP knowledge.
- If answer is still unknown, contact your Regional consultant.

Questions, Comments, Concerns

Questions should be submitted to your EAP Regional Consultant by email.

✓ Don't know who your contact is or their email address?

Catherine Pond catherine.pond@dss.virginia.gov (804) 726-7026 Central and ½ Eastern Regions	**Angela Ector** angela.c.ector@dss.virginia.gov (804) 726-7392 Piedmont and Western Regions	**Hagen Hicks** hagen.hicks@dss.virginia.gov (804) 726-7643 Northern and ½ Eastern Regions

❖ Please include the Case Number in your e-mail.

- Screenshots of the issue can also be helpful.