

Correcting EAP Errors

Review, Verify, Document

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Before authorizing a service request/benefit, make sure to review the Eligibility Summary for the case:

Review the information/results under each column (Program, Eligibility service period, Benefit Amount, etc.).

EDG #	Program/TOA	Eligibility/Service Period	Family Unit Size	Net Benefit Amount	Eligibility Result	Eligibility Status	Eligibility Determination Date	Pending Reasons
								VCL Other
91716897	EAP-Crisis	08/24/2017 -	1	\$ 0.00	Closed	Authorized	08/24/2017	NA NA
91716897	EAP-Crisis	04/13/2018 -	2	\$ 500.00	Approved		04/13/2018	NA NA

If any error is found, navigate to the appropriate screen in the EAP Module and edit the data field, then click **Save+Continue**.

Re-run eligibility for the change/update to become effective.



Eligibility Summary tabs

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Click the [Eligibility/Service Period](#) hyperlink to review the Eligibility Determination Group (EDG) 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.
- 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.

EAP Crisis Eligibility ? ⓘ

Case Name: Eclipse, Luna Case #: 113315331 Case Mode: Ongoing Case Status: Approved

EDG #: 91716897 Program/TOA: EAP-Crisis Eligibility/Service Period: 04/13/2018-
Eligibility Result: Approved Eligibility Status:
Redetermination Date: Interim Report Date: N/A

Eligibility Summary

▶ EAP Application ID	▶ Service Request Date	▶ Service	▶ Vendor Name	▶ Total Benefit Amount	▶ Amount Requested	▶ Amount Authorized	▶ Service Result	▶ Service Status
E00030256	11/01/2017	Heating Equipment Repair	Project Homes	\$500.00	\$500.00	\$500.00	Approved	

Eligibility Summary

Make sure to add Case level comments to document case actions that require clarification.



When determining how to correct errors in VaCMS, IT'S ALL ABOUT THE TIMING

There are several errors types that can be corrected:

- **The wrong vendor was authorized for the case**
- **The incorrect amount was authorized for the service type**
- **Customer becomes ineligible for the service requested**

Consider all aspects of that particular service request:

- **Payment line,**
- **Client Notice of Action (NOA), and**
- **Vendor Credit Authorization (CA)**

so that all associated actions are completed.

Think of each service request singularly. An authorized service request must be completely closed when an error occurs.



Correcting Errors – ON THE DAY THE ERROR WAS MADE

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When you authorize payment to a Credit Authorization Bypass (CAB) vendor, the payment line is written.

The CAB vendors for the Cooling component are:

- AEP
- Dominion Energy
- Mecklenburg Electric Cooperative
- Old Dominion Power

The screenshot shows the 'EAP Credit Authorization Summary' page. On the left is a navigation menu with 'Benefit Issuance' and 'EAP' expanded. The main content area has search criteria for Case Number (113189082), EDG Number, Component (Cooling Assistance), Service, and Program Year (2017). Below the search criteria is a table with one entry:

Case Number	Component	Service	Vendor Name	Program Year	Authorization Date	Authorized Credit Amount	Total Issued Amount
113189082	Cooling Assistance	Payment of an electric bill to operate cooling equipment	Dominion Virginia Power	2017	06/08/2017	\$75.98	\$0.00

From the left Navigation select:

- **Benefit Issuance > EAP > EAP Credit Authorization**
- Search for the case
- Click on the pencil icon for the service request that was approved



Correcting Errors – ON THE DAY THE ERROR WAS MADE, cont.

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- On the **EAP Credit Authorization** screen, click the pencil icon of the **Pending Issuance**.
- Go to the **Close CA/Direct pay with no issuance field**
- Select “Yes” from the dropdown field

Credit Authorization Summary | **EAP Credit Authorization Detail/Issuance**

EAP Credit Authorization Detail/Issuance ? [] []

✓ EAP - 091287 This Credit Authorization/Direct Pay Issuance will permanently close. Please click Add/Update if you want to proceed further.

Type of Assistance Information

Case Number: [116527874](#) EDG Number: 103925662 Case Name: Nancy Drew
Component: Cooling Assistance Service: Payment of an electric bill to operate cooling equipment Total Issued Amount: \$0.00
Energy Year: 2017 Authorization Date: 06/06/2017

Credit Authorization/Issuance

Credit Authorization Amount: \$22.40 Vendor Name: Bobs Cooling Heating and Air Inc Vendor ID: 900100458
* Amount To Be Paid: \$22.40 * Confirm Amount: \$22.40 * Billed Amount: \$22.40
Who Paid: [] Additional Amount: \$ [] Date Paid: [mm]/[dd]/[yyyy]
* Trip Charge: [NO] Warranty Start Date: [mm]/[dd]/[yyyy] Warranty Length (Years): []
Close CA/Direct Pay without Issuance?: [YES]

Reset [] + Add/Update

Issuance Date	Issuance Amount	Payee Name	Check Number	Issuance Status
06/06/2017	\$22.40	Bobs Cooling Heating and Air Inc		Pending Issuance

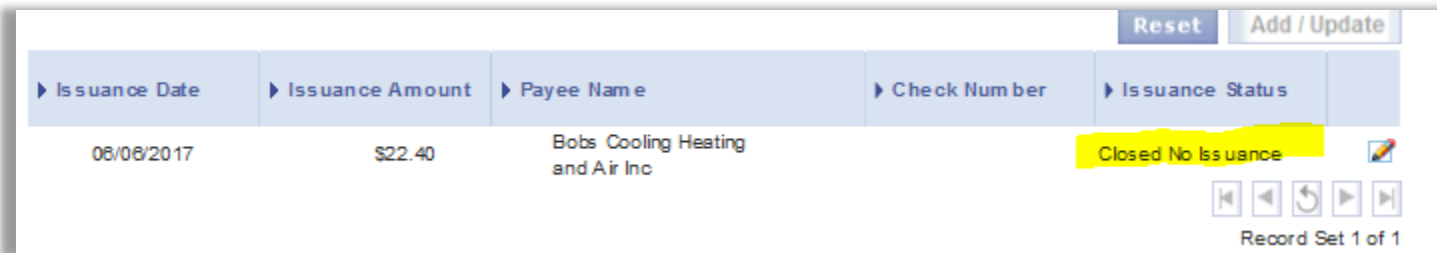
A **Pending Issuance** can be closed for any Cooling or Crisis payment type (utility bill payment, equipment-related service, etc.)



Correcting Errors – cont.

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- Click the **ADD/Update** button
- A green message will display at the top of the screen letting you know that the CA will be permanently closed.
- Click **ADD/Update** a second time to close the CA/pending issuance.



▶ Issuance Date	▶ Issuance Amount	▶ Payee Name	▶ Check Number	▶ Issuance Status
08/08/2017	\$22.40	Bobs Cooling Heating and Air Inc		Closed No Issuance

✓ You'll also want to suppress any correspondence that has been generated to the customer and vendor.

Remember: You can/should only suppress the correspondence on the day it is generated. After the overnight batch has run, the correspondence has been mailed and cannot be suppressed.

Once the CA/service request has been closed under the Benefit Issuance function, the service request will change to closed in the EAP Streamline flow after the overnight batch has been run.

Correcting Errors –

BEFORE PAYMENT HAS BEEN ISSUED

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Look at the **Benefit Issuance** screen to determine the status of the payment

If payment is “**pending issuance**”, you’ll be able to close the CA payment line without the check being sent.

However, if the overnight batch has run after the case has been authorized, the correspondence has been generated and issued (even if the payment is pending issuance).

- Contact the customer and let them know an error has occurred.
- Contact the vendor to request the CA be voided and returned to your agency
 - It will take a day or two for the vendor to receive the CA in the mail. The CA is an authorization to provide service and a “promise to pay” from the Program.
 - It’s important that you let the vendor know what’s going on, so that when they receive the CA they can void and return it to your agency.

NOTE: The payment line can be **closed without issuance** until the check status is changed from **pending issuance** to **issued** on the **EAP Credit Authorization Detail** screen.



Correcting Errors – *AFTER* PAYMENT HAS BEEN ISSUED

The CA and NOA have been sent to the customer.

The payment line has changed from “pending issuance” to “issued”. A check/warrant number has been assigned to the payment.

Contact the vendor and customer and let them know an error has occurred.

Request the vendor refund the payment made in error.

Contact your Regional Consultant if a payment needs to be made after a refund is issued.



EAP Security Deposit/Warranty errors

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If an error was made in authorization of a security deposit or keying equipment warranty, additional steps are needed to remove the associated coding/flags.

Make sure to review the applicable EAP Policy to determine if/when security deposit or warranty information should be removed/updated.

- On the Left Navigation Bar:
- Under **Benefit Issuance** > **EAP** > **Security Deposit/Warranty**
- Enter the search criteria (SSN, case #)
- Set the Locality field to blank
- Select security deposit or warranty from the dropdown field.

The screenshot displays the 'EAP Security Deposit/Warranty' system interface. The left navigation bar includes 'History', 'Case Info', 'Navigation', and 'Organizer'. The main area shows search criteria for 'EAP Security Deposit/Warranty'. The search criteria include fields for Prefix, First Name, Middle Name, Last Name, Suffix, SSN, DOB, Locality, Security Deposit/Warranty, and Case #. The Case # field is populated with '113250822'. Below the search criteria is a table with columns for Case #, Name, Component, Security Deposit/Warranty, Locality, and Status. The table contains one row with the following data: Case # 113250822, Name Sd, Second, Component Cooling, Security Deposit/Warranty Security Deposit, Locality Charlottesville City (540), and Status Approved.

Case #	Name	Component	Security Deposit/Warranty	Locality	Status
113250822	Sd, Second	Cooling	Security Deposit	Charlottesville City (540)	Approved

- Security Deposits with an Approved or Closed status from all program years will be displayed.
- Unexpired warranties with a closed/paid status will be displayed



This page is used to remove a security deposit from the case or to remove or update equipment warranty data.

Worker comments are required to be entered.

Click **Update** to save the data (and to update or remove the flag/coding).

EAP Security Deposit/Warranty Detail ? 🗑️ ↻

Security Deposit/Warranty Information

Case Number:	113250622	EDG Number:	91430985	Case Name:	Second Sd
Program	Cooling Assistance	Service:	Security Deposit for Electricity	Total Issued Amount	\$0.00
Program Year Start Date:	01/01/2017	Program Year End Date:	12/31/2017	Credit Authorization Amount	\$100.00
Vendor Name:	Dominion Virginia Power	Vendor ID:	900100392		

Security Deposit/Warranty Detail Update

Remove Security Deposit: ▼

Remove Warranty: ▼

Change Warranty: Warranty Start Date: 📅

Comments:

Warranty Length (Years):

Worker Making Change: aec540

