



BPRO – EAP Quarterly Meeting

September 19, 2018
Central Regional Office



- ❑ EAP End of Program Year activities
- ❑ Client Management Reports
- ❑ Fuel Assistance case processing flow
- ❑ Questions, comments, concerns



VaCMS is set to “inquiry – only” for changes to EAP cases.

- Only address changes should be entered.
 - EDBC should not be run
- Cases that had pending or unpaid service requests will be closed with “Closed End of Season” reason and no notice will be sent to the customer.
- Income for cases active during the program year will be end-dated.



Use these reports to examine and track service requests/applications to aid in case processing and for informational purposes to assist with staffing needs, board of directors' data, etc.

- The reports can be pulled up by the Report ID or the Report Name
- Both reports are generated in PDF format
- Fuel/Crisis will run between October 1 and May 1. Cooling will run June 14-September 30.



Accessing CMRs

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In VaCMS, from the Left Nav, go to:

- Report Search / EAP
- select RP077B or Client Management Report – Local from the dropdown

The screenshot displays the VaCMS Virginia Case Management System interface. The top navigation bar includes the VaCMS logo, the system name, and user options like Help and Logout. A search bar is set to 'APPLICATION' with a 'Go' button and the date '27 April 2018'. The left sidebar contains a navigation menu with categories like 'History', 'Case Info', and 'Navigation'. The 'Reports Search' category is expanded, showing a list of report types including 'EAP'. The main content area is titled 'EAP Reports' and features a search criteria section with dropdown menus for 'Report ID' (set to 'RP-077B') and 'Report Name' (set to 'Client management report - Local'). Search buttons are present. Below the search criteria is a 'Search Results' section with a table header containing columns for 'Report ID', 'Report Name', 'Frequency', and 'Create Date'. A 'Rectangular Snap' button is visible at the bottom of the search results area.



- The CMR provides counts of total cases being processed for the active component(s).
- The report also provides counts of approved, denied, closed, or pending service requests for Fuel, Crisis, and Cooling Assistance applications.
 - The report will display these counts as of the report run date for the active component(s).
- For all components, the report will break down the counts by Denial and Closure reasons.
- The report also provides the details on the EAP Crisis/Cooling service requests and Fuel Assistance applications at the time of the report run.



- Weekly report runs every Sunday morning that will pick up cases that have approved, denied, closed or pending service request for the component.
 - The locality report can be sorted by locality.



Accessing Reports

After selecting the Client Management Report – Local, the Report I.D. and Name will appear. Click the blue hyperlink.

The screenshot displays the 'EAP Reports' interface. On the left is a navigation menu with categories like 'History', 'Case Info', and 'Organizer'. The main area shows search criteria for 'Report ID' (RP-077B) and 'Report Name' (Client management report - Local). Below this is a table of search results with columns for Report ID, Report Name, Frequency, and Create Date. The first result is highlighted in yellow, and a yellow arrow points to the 'RP-077B' link.

Report ID	Report Name	Frequency	Create Date
RP-077B	Client management report - Local	Weekly	04/06/2018



Accessing Reports, continued

Select your locality, then click the pdf icon next to the most recent report begin date.

The screenshot shows the 'Report History' page in the VaCMS system. The left sidebar contains a navigation menu with categories like 'History', 'Case Info', 'Navigation', and 'Organizer'. The main content area is titled 'Report History' and includes a 'Report Filter Criteria' section with a 'Locality' dropdown menu set to 'All'. Below this is a table titled 'RP-077B Client management report - Local'. The table has columns for 'Report Period Begin Date', 'Report Period End Date', and 'Create Date'. The most recent report is highlighted in blue and has a PDF icon next to its begin date. The table is paginated, showing 'Record Set 1 of 2'.

	Report Period Begin Date	Report Period End Date	Create Date
	03/18/2018	03/24/2018	04/06/2018 04:22:31 PM
	03/25/2018	03/31/2018	04/05/2018 09:03:43 PM
	03/25/2018	03/31/2018	04/05/2018 05:42:09 PM
	03/25/2018	03/31/2018	04/03/2018 06:08:09 PM
	03/25/2018	03/31/2018	04/02/2018 11:12:27 PM
	03/18/2018	03/24/2018	03/30/2018 03:44:21 PM
	03/18/2018	03/24/2018	03/28/2018 11:12:28 PM
	03/04/2018	03/10/2018	03/28/2018 04:07:38 PM
	03/04/2018	03/10/2018	03/28/2018 11:22:18 AM
	03/18/2018	03/24/2018	03/27/2018 08:53:45 PM
	03/18/2018	03/24/2018	03/26/2018 10:29:41 PM



Accessing Reports, continued

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After clicking the hyperlink, the report will display as a pdf. Use the Right scroll bar or the page up and down keys to navigate.

The screenshot shows the VaCMS web application interface. On the left is a navigation menu with categories like History, Case Info, and Navigation. The main area displays the 'Report History' for user BROOKE HICKS. A report for 'RP-077B Client management' is selected, showing a list of dates from 03/18/2018 to 03/18/2018. A detailed report window is open, titled 'Commonwealth of Virginia Department of Social Services CLIENT MANAGEMENT LOCAL REPORT'. It specifies the week of 3/18/2018, locality of Accomack County (001), and report ID RP-077B. The report contains a table with the following data:

Fuel	Number of Cases	Number of Fuel Applications
Total Number of Cases	1590	
Total Approved Applications		1458
Total Closed Applications		24
1. Administrative Error		1
2. Already Receiving Benefits		1
3. Duplicate Application		1
4. Household is ineligible due to gross income over limit		7
5. Individual not in group		9
6. Ineligible Alien status		1
7. No eligible members		4
Closed-Issued		0
Closed without issuance		0
Closed - End of Season		0
Total Denied Applications		126
1. Administrative Error		1
2. Duplicate Application		5
3. Failed to provide income verification		1
4. Failed To Provide Information Needed To Determine Eligibility		3
5. Failed to provide non-financial verification		3
6. Household is ineligible due to gross income over limit		77
7. Individual not in group		16
8. Ineligible Alien status		5
9. Member of another household		1
10. No eligible members		12
11. Requested assistance not offered		1
12. Worker Filed In Error		1
Total Pending Applications		2

The report may be saved or printed.



Management Activities

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- Past staffing history should provide a good indication of staffing needs.
 - Consider economic changes that effect local demand.
- VaCMS access
 - Encourage workers to do their own data entry and ensure they have the needed security clearance.
- Individual email & Internet access
 - Send new names and email addresses to your assigned Regional Consultant to update the local distribution list from the Home Office.
 - Provide names of people that need to be deleted from the list.



- Establish who will take applications from walk in clients.
- Set up procedures for date stamping all applications & verifications.
- Arrange a method for filing undeliverable applications.
- Close undeliverable Pre-approval letters upon receipt.
- Create procedures for applications that need additional information before they can be processed.
- Develop case monitoring procedures to ensure that applications are being processed accurately and will be processed in a timely manner.



Available for review on the EAP Fusion page

- 2018 Fuel Assistance FAQs
- Helpful Hints
- EAP Manual
- EAP Implementation Schedule
- Fuel Assistance 2018

Support staff should review Fuel Features and Fuel System Inquires found in Fusion. <http://spark.dss.virginia.gov/divisions/bp/ea/index.cgi>



Fuel Assistance Flow

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Application is received at the LDSS.



LDSS date-stamps paper application. CH and RDE apps already time stamped.



Worker

- Reviews application
- Pends application in VaCMS (in some agencies, pending of application may be done by a support person)
- Send checklist (if verifications are needed)
- Process application, runs EDBC, and certify/authorize

Worker makes updates/changes to cases, if needed (account number, fuel type, etc.), re-run EDBC, and certify/authorize

Changes made after BD initiate the 10-Day Final Bill process

VaCMS

- Determines eligibility on EDBC run
- Issues Client Notice of Action on cert/auth of eligibility results
- Issues Client Notice of Action (immediately for denials)
- Benefit Determination mid-December
- Generates/mails Fuel Credit Authorizations (CA) to vendors

Clients approved for direct pay receive direct pay checks

Vendor receives Fuel CA showing

- Client name and address
- Type of fuel
- Maximum benefit amount
- Vendor provides fuel
- Returns Fuel CA to Central Payment Processing Unit (CPPU)

CPPU processes payment requests received from vendors by date order



The Fuel Assistance component begins the new Energy Assistance Program year.

2019

Staff processing EAP cases should review every screen/field and make adjustments to the data.

If changes/updates are made, re-run EDBC and cert/auth to have the changes saved.

EAP follows the Federal Fiscal Year October 1 – September 30



Fuel Assistance Processing, cont.

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EAP Client Additional Information

Application/Case #: [REDACTED] Case Name: [REDACTED] Program: Crisis, Cooling Case Status: Closed

View VACMS Data Previous Next

EAP Additional Information

* Name: [REDACTED] Relationship To Case Name: [REDACTED]

Disabled: NO Disabled Verification: [REDACTED]

* US Citizen: YES Alien Status: [REDACTED]

Alien Status Verification: [REDACTED] * Household Status: In Household

Absent Reason: [REDACTED] Estimated Date of Return: mm / dd / yyyy

Medicare Part B Premium Amount: \$ 134.00 Medicare Part B Payment Method: Self payment

Medicare Part D Premium Amount: \$ Medicare Part D Payment Method: [REDACTED]

Community Based Care Patient Pay Amount: \$

Reset Add

Name	Relationship To Case Name	Disabled	US Citizen	Household Status	Medicare Part B Premium Amount	Medicare Part D Premium Amount	Community Based Care Patient Pay Amount
[REDACTED]	[REDACTED]	NO	YES	In Household	134.00		

- Make sure the value for the Disabled field is correct. If the customer is not disabled, the value should be updated to “no” rather than leaving the field blank.
- Review the application to see if Medicare Part B and/or Part D premium payment has been declared by the customer.



Fuel Assistance Processing, cont.

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EAP Income Details

EAP Income Details ? [Icons]

Screen is opened in read-only mode

Application/Case #: [Redacted] Case Name: [Redacted] Program: Crisis, Cooling Case Status: Closed

New Data Previous Next

Income Information

* Name: [Dropdown]
* Begin Month: [mm / yyyy] End Month: [mm / yyyy]
* Income Category: [Dropdown] * Income Type: [Dropdown]
Employer Name: [Text] * Pay Frequency: [Dropdown]
* Pay Received Date: [mm / dd / yyyy] * Gross Pay Amount 1: \$ [Text]
Pay Received Date: [mm / dd / yyyy] Gross Pay Amount 2: \$ [Text]
Pay Received Date: [mm / dd / yyyy] Gross Pay Amount 3: \$ [Text]
Pay Received Date: [mm / dd / yyyy] Gross Pay Amount 4: \$ [Text]
Pay Received Date: [mm / dd / yyyy] Gross Pay Amount 5: \$ [Text]
* Monthly Pay Amount: \$ [Text] * Pay Verification: [Dropdown]

Reset Add

Program Year	Name	Begin Month	End Month	Income Category	Income Type	Employer Name	Monthly Pay Amount	
2018	[Redacted]	02/2018	09/2018	Unearned Income	Social Security (SSA)		1206.00	

Because the year-end activities will end-date all income records, workers will have to **add new income records** for customers on the EAP Income screen.



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

- ✓ Don't know who your contact is or their email address is?
 - ❖ Contact information and regional assignments are found at:
<http://spark.dss.virginia.gov/divisions/bp/ea/contacts.cgi>
 - ❖ Include Case Name and Case Number in your e-mail.

