

# ENERGY ASSISTANCE PROGRAM (EAP) UPDATES

Quarterly EAP BPRO meeting 6/6/18

Meet

and

Greet

Hola!

Bonjour!

Guten tag!


Hello!

Marhaba!

Hi!

A series of three parallel white lines of varying lengths, slanted diagonally from the bottom right towards the top right, located in the lower right quadrant of the image.

# AGENDA

- General Cooling information/reminders
  - Handling Changes
  - Household Data & Case Comments in VaCMS
  - Credit Authorizations
  - DMIS
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# COOLING ASSISTANCE


APPLICATIONS ARE ACCEPTED FRIDAY JUNE 15 THROUGH WEDNESDAY AUGUST 15, 2018

- New Income Limits are on the Information sheet on Fusion
- There are minor formatting changes to the Cooling Application. It's available now on FUSION.
- Common Help [www.commonhelp.Virginia.gov](http://www.commonhelp.Virginia.gov) and the Enterprise Customer Service Center 1-855-635-4370, begin taking applications 6/15/18
- Applications entered into the EAP Inbox with an application date prior to 6/15/18 will be denied as "Outside of the component time frame" when eligibility is run.
- The maximum benefit amount for an electric bill will be announced via Broadcast before June 15.

# Changes

Cooling Assistance is the third and last component in the federal fiscal year. A customer may report new/different information from what is in VaCMS from the Fuel or Crisis component, which needs to be updated.

Common changes reported are:

- Household composition
  - Significant income changes
  - Vendor change
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- A decorative graphic consisting of several parallel white lines of varying lengths and orientations, located in the bottom right corner of the slide.

# Household Composition Changes

Household composition change may be one of the most common changes.

- To **add** a household member, from the EAP Client Details screen, you would type in the customer's demographic information and click Add, then the system will File Clear to see if the customer has an existing Client I.D.
- To **remove** someone from the household, on the EAP Client Additional Information screen, you must change their Household Status to "Out of the Household" and complete the Absent Reason.
  - If they are returning to the home, input the Estimated Date of Return.

# Disability Indicator

- The customer's disability status must be coded correctly on the EAP Client Additional Information screen.
- If the customer is disabled and is not coded as disabled, the household may fail eligibility and an underpayment may occur.
- Conversely, if a household member is coded as disabled and they are not disabled; the household may be approved for benefits when they were not ineligible.
- Disability status is read from the EAP Client Additional Information screen, not the income screen. Keying a customer's income as SSA or SSI does not tell the system they are disabled.

The screenshot displays the 'EAP Client Additional Information' web form. At the top, it shows the application/case number (113189662), case name (Men, Ultra), program (Crisis), and case status (Closed). Below this is a 'View VACMS Data' button and navigation buttons for 'Previous' and 'Next'. The main section is titled 'EAP Additional Information' and contains several fields. The 'Disabled' field is highlighted in yellow and is currently set to 'No'. Other fields include 'Name' (Men, Ultra 42M), 'Relationship To Case Name', 'US Citizen' (YES), 'Alien Status', 'Household Status' (In Household), and 'Estimated Date of Return'. There are also input fields for Medicare Part B and D premium amounts and payment methods.

# Income Changes

- Workers should always utilize the New Data button to view and populate income that has already been verified by other Public Assistance.
- If a household member's income changes, the worker should end date the income on the EAP Income Details screen.
- New income can be added by selecting the household member from the Name drop down box, adding the income information and clicking Update.
- If the household's income change is not significant from the Fuel/Crisis component, meaning it will not result in a change in the household's overall eligibility status, the income does not need to be changed.
  - If there is a significant change, click the pencil to update the income record; then click save and continue.



# Cooling Payments

- The amount keyed in the Service Request Amount field on the Cooling Assistance screen should not be left blank and is the amount that will be approved.
- Many agencies have vendors that bypass the Credit Authorization (CA) process, by allowing local agency staff to view their customer portal, to verify account information and balances.
- When you approve a customer who uses a CAB (Credit Authorization bypass) vendor, the payment is not immediately sent to the vendor.
- VaCMS and vendor's computer systems do not "talk" to each other.
- Regardless if you pay a Credit Authorization through the EAP Credit Authorization screen, or if the system does it automatically if you approve a CAB vendor, a paper check is sent to the vendor.
- It is important to make pledges to the vendor, if a customer is in a disconnection status or is on a budget plan because even with CAB vendors, the paper check may not get to the vendor until 7-10 days after the case has been approved, then the vendor needs time to process and apply the payments.
- A pledge should be done if there is a disconnection, reconnection or budget removal notice.

# Credit Authorization Bypass (CAB) Process

Certain vendors allow LDSS workers to access and view their online system to verify a customer's account information/status.

Current CAB vendors are:

- Dominion Energy
- Appalachian Electric Power
- Old Dominion Power
- Mecklenburg Electric

What happens when you approve an electric bill payment for a CAB vendor?

- When you authorize payment to a CAB vendor, the payment line is written on the EAP Credit Authorization Details/Issuance screen under Benefit Issuance and states pending issuance.
- It's essential to make sure you choose the correct vendor and payment method.

# Non-Eligibility related Household information

## Heating Data

- If the customer reports their heating data on their Cooling Assistance application, enter that information on the Cooling Assistance screen under Heating Data.
- Heating Data information is used to prepopulate pre-printed Fuel Assistance application or to pre-approve households for Fuel Assistance.

## Performance Measures

- Questions 15 and 23-25 on the Cooling Assistance application correlate with the Performance Measures section on the Cooling Assistance screen in VaCMS. Completing this information is helpful for federal reporting purposes. Cooling Assistance is federally funded. However, if the customer does not complete this information, you do not need to contact them to obtain the information.

# Check your work to prevent errors

- Always review Eligibility Tabs before you Certify/Authorize the case
- To review the tabs, click on the hyperlink of the EDG you want to review

**EAP - Eligibility Summary** ? 📄

Case Name: Man, Ultra      Case #: [113189662](#)      Case Action:      Case Status: Pending

[Waitlist Communication Form](#)   [Client Communication Form](#)   [Verification Checklist](#)   [Next](#)

▶ EDG #	▶ Program/TOA	▶ Eligibility/Service Period	▶ Family Unit Size	▶ Net Benefit Amount	▶ Eligibility Result	▶ Eligibility Status	▶ Eligibility Determination Date	Pending Reasons	
								<a href="#">VCL</a>	<a href="#">Other</a>
91145839	EAP.Crisis	<a href="#">11/03/2016</a>	0	\$ 0.00	Closed	Authorized	11/03/2016	NA	NA
103925661	EAP-Cooling	<a href="#">06/05/2017</a>	1	\$ 75.98	Approved		06/06/2017	NA	NA

[Waitlist Communication Form](#)   [Client Communication Form](#)   [Verification Checklist](#)   [Next](#)

## Click on each tab across the top of the screen

- Under **Notice Reason** - if the service request has been denied, make sure the correct denial notice reason displays
- Under **EAP Income** confirm the correct income amount and medical deductions (if applicable) were calculated

The screenshot shows the 'EAP EDG Summary' screen with four tabs at the top: 'Summary', 'Notice Reasons', 'EAP Income', and 'EAP Cooling'. The 'EAP Cooling' tab is currently selected. The main content area includes an 'Eligibility Summary' button, a case information box with fields for Case Name, Case #, Case Mode, and Case Status, and another box with EDG #, Program/TOA, Eligibility/Service Period, Eligibility Result, Eligibility Status, Redetermination Date, and Interim Report Date. Below this is an 'EDG Information' section with 'Eligibility Begin Date' and 'Eligibility / Patient Pay End Date'. A verification table shows 'Non Financial: Pass', 'Resource: N/A', 'Financial: Pass', and 'Verification: Pass'. At the bottom, a table lists EDG details: Name (Man\_Ultra), Certified Group (Y), Relationship (Self), and Participation Status (Eligible Adult). An 'Eligibility Summary' button is also located at the bottom right of the screen.

Name	Certified Group	Relationship	Participation Status	
EDG	Man_Ultra	Y	Self	Eligible Adult

- The **EAP Cooling** tab will show the vendor and amount approved.
- Click **Eligibility Summary** to return to the summary screen where you can authorize the result(s).

# DMIS AND CASE READING

- Regional Consultants monitor/read Fuel, Crisis and Cooling cases from each agency, about every 1-3 years depending on the size of your agency.
- Instead of requesting paper/physical case records from local agencies, consultants are now reading applications by viewing the information in the EAP Module in the read-only mode and by viewing case-related documents in DMIS.
- It is important for local agencies to scan applications and supporting documentation in DMIS timely. Common Help pdfs do not need to be scanned because they can be retrieved from Myworkspace.
- For a list of items that EAP requires to be scanned into DMIS, go to FUSION / VoCMS/ DMIS- Document Management Imaging System, then click on **Documents Required to be Scanned for DMIS**. EAP information is on page six.

# CASE COMMENTS AND PAGE COMMENTS

- EAP Case Comments can be accessed from the Left Navigation under the EAP module. The worker must first enter the case from the EAP Inbox by clicking on Update Application/case, before clicking on EAP Case Comments under EAP.
- Case comments can be added to a case in any status (even closed).
- Case comments should be used by anyone working on the case to explain case actions that cannot be understood by viewing the EAP screens. Correspondence with the customer and the vendor should be documented.
- Page comments are available on every page in the EAP module to explain case actions on individual pages.

# Information sheet

- The information sheet is updated in May, each year.
- It contains general Energy Assistance Program information, with descriptions of Fuel, Crisis and Cooling Assistance.
- The information sheet should be given to any customer who asks for an EAP application, or information on Energy Assistance.
- A best practice would be to give a copy of the Information form to every Benefit Program and Service worker in your agency, so they can know the general program requirements, so they can give their customers the information.
- The EAP Manual and information sheet have been updated with the new/current income guidelines. Income guidelines may increase yearly. The Information sheet can be found on FUSION.



# Change Requests (CR)

## **What is a Change Request?**

- A formal document in which the Program Area requests a change to be made in VaCMS. Anything that is not a defect that needs to be changed, has go to through a CR. Changes must be approved and prioritized.

## **How does a Change Request begin?**

- Most CRs begin with a VCCC ticket.

## **What affects how quickly a Change Request gets completed?**

- Every Benefit Program has Change Requests. CRs are released monthly or bimonthly with other CRs in other programs. Medicaid expansion will impact future CRs for the foreseeable future.

## **Before a CR can be released**

- There are design sessions, testing and reviews with Deloitte, DES and the Business (EAP or other Benefit Program).

# Client Management Reports

- The CMR is similar to the paper report that used to be sent weekly to local agencies, from the EAP Legacy system.
- Most LDSS staff will use the CMR – Local report to view/obtain information about their own locality's statistical information for the current/active EAP component (Fuel/Crisis or Cooling).
- The CMR – State report can be pulled/viewed to see statewide summaries.
- This report 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 county by Denial and Closure reasons.

\*\*Please reference the May Readiness powerpoint on FUSION for additional information including screenshots

## CMR info continued...

- The report runs on Sunday mornings - Fuel/Crisis will run between October 1 and May 1. Cooling will run June 15-September 30.
- Detailed instructions on how to find/view/use both State and Local reports were emailed to the EAP Distribution. If you did not receive the email, contact your assigned EAP Regional Consultant.
- Although the pdf/reports should be available in VaCMS, you may want to save a copy of the report at the end of each component, to your documents on your computer.

# Reminders and Recommendations

- Check Pending by Component and Unpaid Reports throughout the Cooling season to stay on track.
- Some of the most effective **Outreach** you can do as an EAP worker is within your local agency. Make sure all Benefit Program, front desk and Service worker staff are aware of general program information and application dates.
- Have a plan within your agency regarding VCCC tickets. Some agencies have one person, or a small group of supervisors in charge of monitoring tickets. Other agencies allow workers to file tickets. Home Office will not necessarily know if a VaCMS issue/defect, unless a VCCC ticket is logged and reported to a Regional Consultant.
- Cross-train and have back-up workers for EAP. There needs to be at least one person in your agency at all times that can respond to EAP-related questions and process applications.