



Vermont COVID-19 Arrearage Assistance Program Utility Reviewer User Guide

Prepared by MTX Group
V1.0 (Modified 8/28/2020)

Program Information	3
Login	3
Home Screen	3
Assigning Reviewers	5
Review Application - Verify	7
Review Application - Mark as Incomplete	9
Review Application - Mark as Rejected	11
Review Application - Remove from Queue	13
Account Number Search	14
Funding Dashboard	15

Login

Step 1: **Visit** <https://uat-vermont.cs32.force.com/UtilityArrearsBroadband/s/>

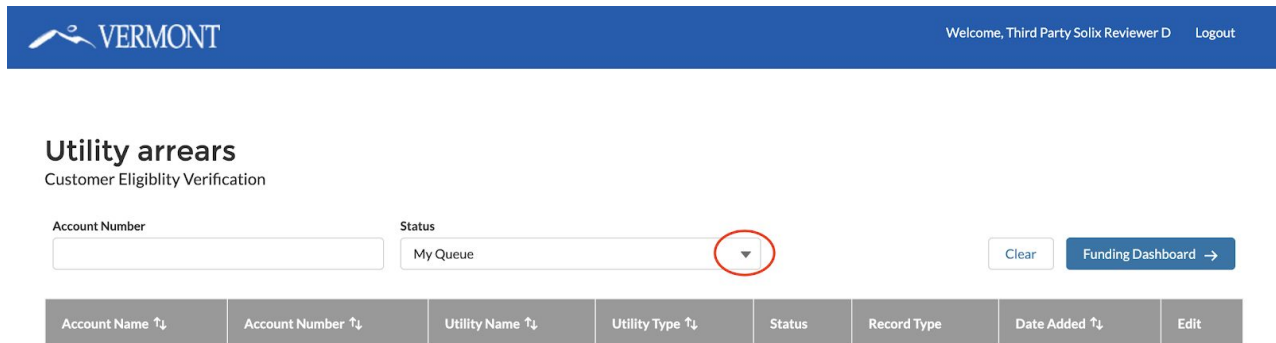
Step 2: **Enter** Username (email format, i.e. bob.smith@gmail.com) and **Password**.

Step 3: **Login** to Community

Home Screen

Upon login will be redirected to the utility dashboard.

Step 4: Click on the triangle next to “My Queue” under the Status, in order to see a view of the different queues.



The screenshot shows the 'Utility arrears' dashboard. At the top is a blue header with the Vermont logo on the left and 'Welcome, Third Party Solix Reviewer D Logout' on the right. Below the header, the title 'Utility arrears' is followed by 'Customer Eligibility Verification'. There are two input fields: 'Account Number' and 'Status'. The 'Status' field contains 'My Queue' and has a dropdown arrow highlighted with a red circle. To the right of the 'Status' field are 'Clear' and 'Funding Dashboard →' buttons. Below the search area is a table with the following headers: 'Account Name ↑↓', 'Account Number ↑↓', 'Utility Name ↑↓', 'Utility Type ↑↓', 'Status', 'Record Type', 'Date Added ↑↓', and 'Edit'.

Note: **Utility Name** is the name of the utility company. **Utility Type** is the entity type. **Record Type** reflects the type of application the user applied for: Residential Arrears, Non-Residential Arrears or the Temporary Broadband Subsidy Program

Step 5: Select “Utility Queue”

Utility arrears

Customer Eligibility Verification

Account Number
 Status

Account Name ↑↓	Account Number ↑↓	Status	Record Type	Date Added ↑↓	Edit
		<div style="border: 1px solid #ccc; padding: 5px;"> <p>My Queue</p> <hr/> <p>✓ My Queue</p> <p>Utility Queue</p> <p>Incomplete</p> <p>Verified</p> <p>Rejected</p> <p>All</p> </div>			

The different statuses you can select will take you to a different listview of the applications:

- **My Queue** - You will be able to edit and review the applications that are assigned to you in this list view. The status of the applications will be “Pending”.
- **Utility Queue** - Any applications that have been submitted and have a status of “Pending” will appear in this list view. This is also where you will assign the applications to either yourself or other reviewers.
- **Incomplete** - The applications that have been marked as “Incomplete” will appear in this list view.
- **Rejected** - The applications that have been marked as “Rejected” will appear in this list view.
- **All** - All applications, regardless of their status or who the application is assigned to, will appear in this list view. This is a useful place to find applications by searching the account number.

Assigning Reviewers

Step 1: Once the “Utility Queue” has been selected, you will be able to assign the applications to reviewers. In order to do this, select the icon for the application you would like to assign under the “Assign” column.



Utility arrears

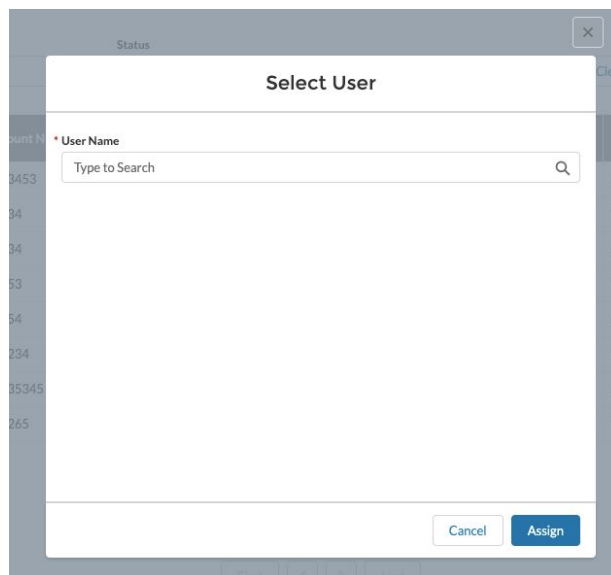
Customer Eligibility Verification

Account Number Status

Account Name ↑↓	Account Number ↑↓	Utility Name ↑↓	Utility Type ↑↓	Status	Record Type	Date Added ↑	Assign
Test 1	123432425	BCN Telecom	Landline Telephone	Pending	Residential Arrears	Aug 27, 2020	
test 434	34534535	Broadwing Communications	Landline Telephone	Pending	Residential Arrears	Aug 27, 2020	

Page 1 of 1

Step 2: Search the appropriate name you would like to assign the application to. In this case, assign the application to yourself. Select Assign.




Step 3: Once you have selected “Assign”, the application will no longer appear in the “Utility Queue” Select the “My Queue” status in order to view the applications that are assigned to yourself. The application will appear in the queue.

Utility arrears

Customer Eligibility Verification

Account Number Status

Account Name ↑↓	Account Number ↑↓	Utility Name ↑↓	Utility Type ↑↓	Status	Record Type	Date Added ↑↓	Edit
Test 1	123432425	BCN Telecom	Landline Telephone	Pending	Residential Arrears	Aug 27, 2020	

Review Application- Verify Application

Step 1: Once the application has been assigned to yourself and is now appearing in “My Queue”, you will next select the pencil icon under edit in order to review the application.

Utility arrears

Customer Eligibility Verification

Account Number Status My Queue Clear Funding Dashboard →

Account Name ↑↓	Account Number ↑↓	Utility Name ↑↓	Utility Type ↑↓	Status	Record Type	Date Added ↑↓	Edit
Test 1	123432425	BCN Telecom	Landline Telephone	Pending	Residential Arrears	Aug 27, 2020	

Page 1 of 1

Step 2: The review page will appear. If you are reviewing a telecommunications application, in order to see the most recent utility bill, select the Attached File. You will need this bill in order to verify that the applicant is a current customer, and to enter the Total Arrears and the Eligible Arrears.

Verification

Verify Customer Account - Residential Arrears

Service Address
test
test, Vermont 32423

Phone Number
(543) 534-5345

Secondary Phone Number
(543) 534-5345

* Account Name

* Account Number

* Total Arrears

* Eligible Arrears

* Notes

I certify that the information provided is verified

Attached Files
[Most Recent Bill test](#)

Remove From Queue

Mark Rejected
Mark Incomplete
Verify

Step 3: The “Total Arrears” and “Eligible Arrears” will need to be entered. See Desk Aid.

Note: You will not be able to verify the application if the Eligible Arrears is greater than the Total Arrears and if the values that are entered reflect they are, you will be prompted with an error message to update the values.

Step 4: Once you are able to verify the customer’s account, you will need to select the checkbox to attest that the information is accurate and verified before you can select “Verify”.

The screenshot shows a web form titled "Verify Customer Account - Residential Arrears". The form contains several input fields and a checkbox. On the left side, there are labels for "Service Address", "Phone Number", and "Secondary Phone Number" with their respective values. The main form area has four fields: "Account Name" (Test 1), "Total Arrears" (\$1,400.00), "Eligible Arrears" (\$800.00), and "Account Number" (123432425). There is also a "Notes" field which is currently empty. Below the "Account Number" field, there is a checked checkbox with the text "I certify that the information provided is verified". To the right of this checkbox is a section for "Attached Files" with a link to "Most Recent Bill test". At the bottom of the form, there are three buttons: "Remove From Queue" (with a red flag icon), "Mark Rejected", and "Mark Incomplete". A blue "Verify" button is located at the bottom right of the form.

Step 5: Once the application has been verified, it will be removed from “My Queue”. The application will now appear under the “Verified” listview and under the “All” listview.

Review Application - Mark as Incomplete

Step 1: Marking an application as “Incomplete” will reopen the application and allow the applicant to make any changes or updates that are necessary. If for any reason you need to mark the application as incomplete, you will select “Mark Incomplete” on the review page.

Step 2: You will next have to select the reason why you are marking the application as incomplete.

Note: An important note is that whichever selection you make, it will then trigger an email to the applicant with the reason why you are marking the application as incomplete. Below is a table that defines the message that will be sent to the applicant based on the selected reason.

Reason of Incomplete	Notification sent to applicant
No Telecomm Bill Uploaded	A determination of eligible arrears from telecommunications services could not be made. Please upload an electronic version of the most recent telecommunications invoice of bill.
Customer Info Not Verified	The account holder’s contact information or service location could not be verified. Please confirm the email address, physical service address in Vermont, or mailing address.
Account Info Not Verified	The account information provided for {insert utility sector} could not be found. Please confirm the utility company provider, the full name of the account holder on a recent bill, the service address and the account number.

Step 3: Once you have selected a reason why you are marking the application as incomplete, select “Save”. The application will now be removed from “My Queue” and will appear in the “Incomplete” listview and the “All” listview.

Review Application - Mark as Rejected

Step 1: Marking an application as “Rejected” will result in the rejection of the application and the applicant will be notified. If you need to reject the application, you will select “Mark Rejected”

The screenshot shows a web form titled "Verify Customer Account - Residential Arrears". The form contains several input fields and a checkbox. The "Account Name" field contains "Test 1", and the "Account Number" field contains "123432425". There are empty fields for "Total Arrears" and "Eligible Arrears". A "Notes" field is also present. A checkbox labeled "I certify that the information provided is verified" is unchecked. To the right, there is an "Attached Files" section with a link for "Most Recent Bill test". At the bottom of the form, there are three buttons: "Remove From Queue" (with a red flag icon), "Mark Rejected" (circled in red), "Mark Incomplete", and "Verify".

Step 2: You will next have to select the reason why you are marking the application as rejected.

The screenshot shows a dialog box titled "Rejected Reason - Residential Arrears". It features a dropdown menu labeled "Reason for being rejected" with the text "Select Reason for being rejected". The dropdown is open, displaying a list of reasons: "Funding Exhausted", "Account Inactive", "Wrong Application Type (Residential or Non Residential)", and "No Arrears". At the bottom right of the dialog, there are "Cancel" and "Save" buttons.

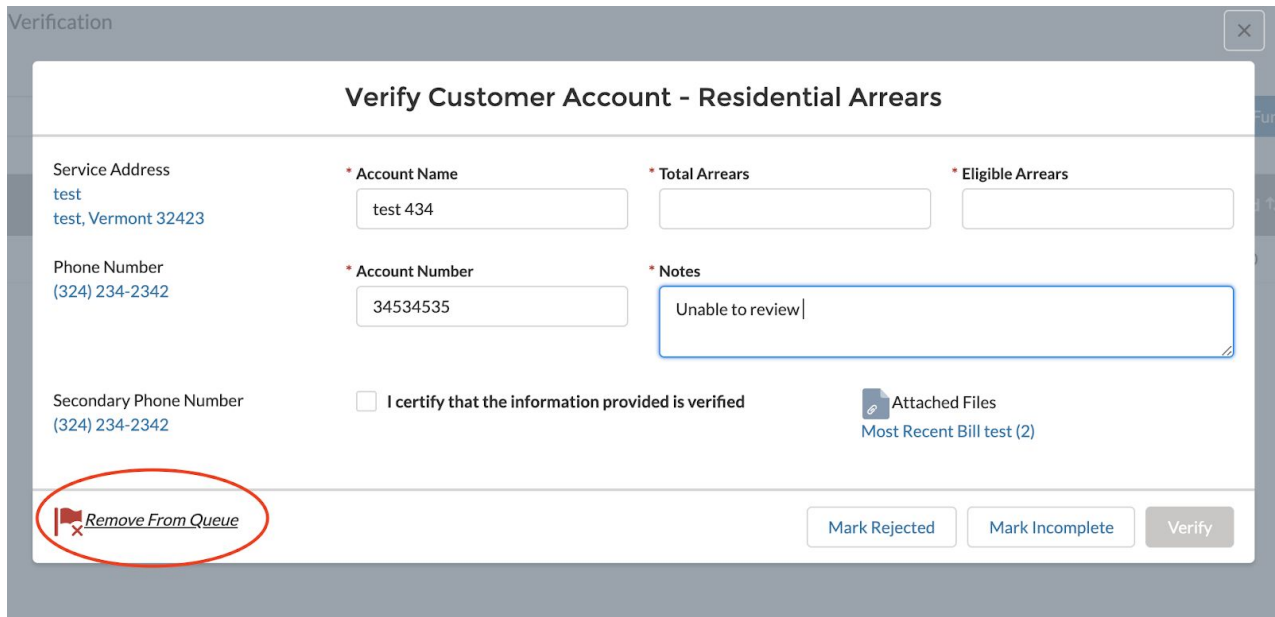
Note: An important note is that whichever selection you make, it will then trigger an email to the applicant with the reason why you are marking the application as rejected. Below is a table that defines the message that will be sent to the applicant based on the selected reason.

Reason for being rejected	Notification sent to applicant
Funding Exhausted	The funds available for VCAAP grant awards made available to customers of {insert utility name} have been exhausted.
Account Inactive	The account for {insert utility sector} service with {insert utility name} is no longer active.
Wrong Application Type (Residential or Non-Residential)	The account for {insert utility sector} service with {insert utility name} is a residential {non-residential} account that requires a distinct set of information and certifications from a non-residential {residential} application. The applicant must resubmit the application as a residential {non-residential} VCAAP application.
No Arrears	The account for {insert utility sector} service with {insert utility name} does not have qualifying arrears for services received on or after March 1, 2020 or more 60 days late.

Step 3: Once you have selected a reason why you are marking the application as rejected, select “Save”. The application will now be removed from “My Queue” and will appear in the “Rejected” listview and the “All” listview.

Review Application - Remove from Queue

- Once you have selected an application to review, and if for any reason you need to remove it from “My Queue”, you will first need to input text in the “Notes” textbox, then select “Remove from Queue” and click “Save”. This will remove the application from your queue and will move the application back to the “Utility Queue”. Once the application is back in the “Utility Queue”, it can be reassigned to other reviewers. The notes that you entered will be saved so that the next reviewer who is assigned to the application will be able to see what was written in the textbox.



Verification

Verify Customer Account - Residential Arrears

Service Address
test
test, Vermont 32423

* Account Name
test 434

* Total Arrears

* Eligible Arrears

Phone Number
(324) 234-2342


* Account Number
34534535

* Notes
Unable to review|

Secondary Phone Number
(324) 234-2342

I certify that the information provided is verified

Attached Files
Most Recent Bill test (2)

 Remove From Queue

Mark Rejected Mark Incomplete Verify

Note: You are required to enter text in the notes field before you are able to remove the application from the queue. The text you enter can reflect the reason why you have removed the application from the queue or you can give instructions to the next reviewer.

Account Number Search

Step 1: You are able to search an account number by selecting the text box under “Account Number”. Once you have entered the numbers, you can either select “Tab” or click outside of the text field in order to load the applications.

Utility arrears

Customer Eligibility Verification

Account Number: Status:

Account Name ↑↓	Account Number ↑↓	Utility Name ↑↓	Utility Type ↑↓	Status	Record Type	Date Added ↑↓
Alisha	123586	Other	Landline Telephone	Verified	Residential Arrears	Aug 14, 2020
Test	1234566	Burlington Telecom	Broadband	Verified	Temporary Broadband Subsidy Program	Aug 14, 2020
Test One	123456234234	Burlington Telecom	Broadband	Verified	Temporary Broadband Subsidy Program	Aug 14, 2020
Home School	1235487444	Comcast Xfinity	Broadband	Pending	Temporary Broadband Subsidy Program	Aug 17, 2020
Test BCN	123123	BCN Telecom	Landline Telephone	Pending	Residential Arrears	Aug 24, 2020
Test	123123132123	BCN Telecom	Landline Telephone	Incomplete	Residential Arrears	Aug 26, 2020
connor mcgreggor	1234345565666655	Charter	Broadband	Pending	Temporary Broadband Subsidy Program	Aug 27, 2020
Test 1	123432425	BCN Telecom	Landline Telephone	Incomplete	Residential Arrears	Aug 27, 2020

Page 1 of 1

Note: Whichever list view you are currently Searching the account numbers under the “All” list view can be helpful because you are able to search every application regardless of the status or who the application is assigned to.

Funding Dashboard

Step 1: In order to track the total amount of awarded funds and track the amount of remaining funds, you can select “Funding Dashboard”.

Utility arrears

Customer Eligibility Verification

Account Number Status My Queue Clear Funding Dashboard →

Account Name ↑↓	Account Number ↑↓	Utility Name ↑↓	Utility Type ↑↓	Status	Record Type	Date Added ↑↓	Edit
test 434	34534535	Broadwing Communications	Landline Telephone	Pending	Residential Arrears	Aug 27, 2020	

Page 1 of 1

Step 2: You will be prompted to the below screen. Each time an application is verified, the “Award Amount” will be updated, along with the “Remaining Award Amount” and the “Exhausted (%)”. At any time to return back to the home screen, select “Back to Dashboard”.

Funding Sources

[← Back to Dashboard](#)

Name ↓	Total Award Cap ↑↓	Amount Awarded ↑↓	Remaining Award Amount ↑↓	Exhausted (%)
BCN Telecom - NonResidential - Funding Source	\$5,000.00	\$0.00	\$5,000.00	0%
BCN Telecom - Residential - Funding Source	\$5,000.00	\$62.00	\$4,938.00	1.24%