

# **FPL Assist Web Portal Modifying Commitments**

## Introduction

At the end of this module, you will be able to perform the following tasks in the FPL Assist Web Portal:

- Modify active commitments on a customer's account
- Request a commitment extension for an active commitment from your agency



## Modifying Active Commitments

Once a commitment is entered, there are two ways that it can be modified. Commitments can be modified by:

- Funding type or amount by retrieving a customer's account or
- Expiration date by retrieving all commitments made by your agency

Let's first review the steps for viewing and modifying an active commitment on a customer's account.



## Modify Commitment on an Account

The following table provides the steps for modifying the commitment on an account.

Step	Action
1	<b>Retrieve</b> customer's account
2	<b>Click</b> View Commitment History <b>Result:</b> Commitment History window displays
3	<b>Click</b> blue Active commitment link for commitment that needs to be modified <b>Result:</b> Modify Commitment window displays

**Retrieve Bill Account**  
Please enter the information below. Do not enter dashes in the bill account number.

1

Enter last name.

Account Number (10 digits)

By entering account retrieval data, you confirm that you have the customer's authorization for release of information.

**CONTINUE**

CANCEL

Retrieve Account View Bill Enter Commitment Review

Account Information

Bill Account: 9876543210 Account Name: FPL Customer Service Address: 123 Customer Ln

View Commitment History >

Payment Extens >

Commitment History

Funding Type	Status	Setup Date	Expire Date	Amount	Details
EHEAP	ACTIVE	Oct 24, 2017	Apr 18, 2016	\$231.61	⌵

**Important:** A commitment can only be **modified one time**. If it has already been modified, the message below will appear after clicking on the blue active link. This commitment will **not be able** to be modified. Contact your area manager for assistance.

This commitment has already been modified - no additional changes can be made

Let's first review the steps for viewing and modifying an active commitment on a **customer's account**.

## Modify Commitment on an Account (cont.)

### Modify Commitment

Existing Commitment Amount is \$100.00

<b>SETUP DATE</b> 2/29/2016	<b>EXPIRE DATE</b> Dec 18, 2017
<b>AGENCY NAME</b> IM FPL Test Agency	
<b>SETUP REP</b> Test Rep	<b>AGENCY REP</b> Test Rep

**Funding Type:** EHEAP

Total Amount Due	\$1,976.67
Total Past Due	\$1,976.67
Total Collectibles	\$1,919.78
<b>Other</b>	

Other: \$ 200.00

**Commitment Total** \$200.00

changing to 200

**UPDATE**

CANCEL

### Review Commitment

<b>SETUP DATE</b> 2/29/2016	<b>EXPIRE DATE</b> 12/18/2017
<b>AGENCY NAME</b> IM FPL Test Agency	<b>AGENCY REP</b> Test Rep
<b>SETUP REP</b> Test Rep	<b>FUNDING TYPE</b> EHEAP
<b>AMOUNT</b> \$200.00	

**SUBMIT**

CANCEL

Use the following steps to modify a commitment in the FPL Assist Web Portal.

Step	Action
1	<b>Revise</b> funding type, if needed
2	<b>Revise</b> commitment amount, if needed
3	<b>Enter</b> reason for editing commitment
4	<b>Select</b> Update to update commitment and move to the next step
5	<b>Review</b> commitment and <b>click</b> Submit
6	<b>Print</b> Commitment Agreement letter

### Commitment Agreement

Please print this commitment agreement for your records. An automatic email will be sent to this customer with this agreement. Please note this agreement letter will be accessible from the Active Commitment page as long as the commitment is active on the account.

**PRINT**

Subject Re: Payment Assistance Commitment for FPL Account

Dear

This letter is to confirm the creation of a payment assistance agreement on your behalf for the referenced FPL account number. The agreement commits the agency to make a payment to Florida Power & Light Company according to the commitment details outlined below.

FPL Bill Account Data : the commitment is for this bill account only  
 FPL Bill Account Number :  
 Service Address :

Agency Information : provides detail on the agency making the commitment on your behalf  
 Agency Name : IM FPL Test Agency  
 Agency Rep :  
 Setup Date : 2/29/2016  
 Commitment Amt : \$200.00  
 Commitment Expiration Date : 12/18/2017  
 Funding Type : EHEAP

Your FPL bill account is exempt from collection action only for the amount of this commitment. Any other outstanding balances remain due and must be paid on time to avoid collection action.

If you have any questions about the status of your assistance payment, please call the agency.

Respectfully

FPL ASSIST Department

**FINISH**

Add another commitment to this account

## Request Commitment Extension for your Agency

Commitments can also be viewed and modified by your agency.

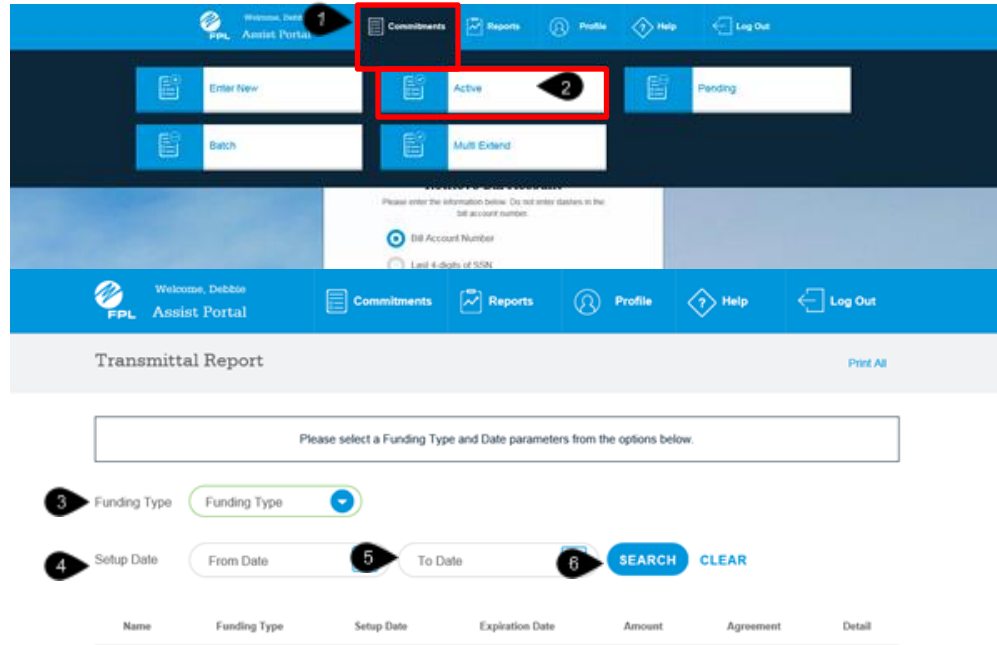
When you modify a commitment using this function, it will only allow the expiration date to be changed. If you need to change the funding type or amount of a commitment, you will need to modify the commitment by retrieving the account.

Let's review the steps for modifying active commitments for your agency.



## Modifying Active Agency Commitments

The following information provides steps for modifying commitments for your agency.



Step	Action
<b><i>Transmittal Report</i></b>	
1	<b>Select</b> Commitments from menu <b>Result:</b> Commitment menu is displayed
2	<b>Select</b> Active card <b>Result:</b> Transmittal Report is displayed
3	<b>Click</b> Funding type drop-down arrow to select funding type <b>Result:</b> Funding types will be displayed
4	<b>Select</b> Setup From Date from calendar <b>Note:</b> This is the starting setup date of commitments you want to view
5	<b>Select</b> Setup to Date from calendar <b>Note:</b> This is the ending setup date of commitments you want to view
6	<b>Click</b> Search to execute search <b>Result:</b> Active commitments for your agency are displayed

Let's review the window and results that will be displayed.

## Modifying Active Agency Commitments (cont.)

Use the steps on the following table to view the parts and functions and how to use the Transmittal Report window.

Transmittal Report Print All

To request a commitment extension, please click on the customer name. If customer is not eligible, you will not be able to click.

Funding Type: EHEAP

Setup Date: 07/30/2017 10/26/2017 SEARCH CLEAR

Displaying 32 records with \$9,364.67 in total commitments

Name	Funding Type	Setup Date	Expiration Date	Amount	Agreement	Detail
TYLER C MULLIS	EHEAP	Oct 19, 2017	Dec 18, 2017	\$600.00		▼
<a href="#">ABC CUSTOMER</a>	EHEAP	Oct 19, 2017	Dec 18, 2017	\$100.00		▼
ABC CUSTOMER	EHEAP	Oct 20, 2017	Dec 19, 2017	\$1,029.54		▼
ABC CUSTOMER	EHEAP	Oct 20, 2017	Apr 4, 2016	\$23.00		▼
ABC CUSTOMER	EHEAP	Oct 20, 2017	Apr 4, 2016	\$100.00		▼
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$100.00		▼
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$200.00		▼
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$300.00		▼
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$100.00		▼
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$899.99		▼

**Request Commitment Extension**

Are you sure you want to request a 30 day expiration date extension for this commitment?

**THERESA A OMALLEY**  
7838037146

2 SUBMIT Cancel

Step	Action
1	<p><b>Click</b> on blue active link for account that will be modified</p> <p><b>Result:</b> Request Commitment Extension window is displayed</p>
2	<p><b>Select</b> submit to extend expiration date for 30 days</p>
3	<p><b>Print</b> Commitment Agreement Letter</p>

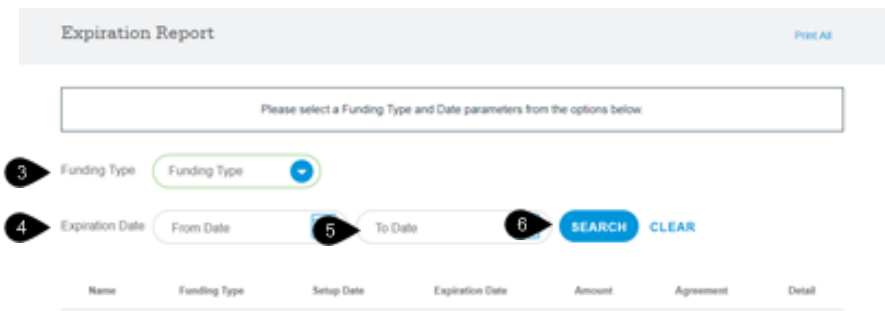
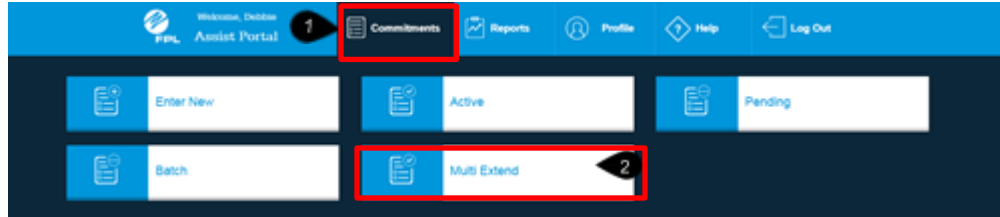
**Important:** A commitment can only be **modified once**. If it has already been modified, the link for the customer's name will be in grey and will not be an active link.

This commitment will **not be able** to be modified. Contact your Area Manager for assistance.





## Modifying Multiple Active Agency Commitments



The following information provides steps for viewing the Expiration Report.

Step	Action
1	<b>Select</b> Commitments <b>Result:</b> Commitment menu is displayed
2	<b>Select</b> Multi Extend <b>Result:</b> Expiration Report is displayed
3	<b>Click</b> dropdown arrow to select funding type <b>Result:</b> Funding types will be displayed
4	<b>Select</b> Expiration From Date from calendar <b>Note:</b> This is the starting expiration date of commitments you want to view
5	<b>Select</b> Expiration to Date from calendar <b>Note:</b> This is the ending expiration date of commitments you want to view
6	<b>Click</b> Search to execute search <b>Result:</b> Commitments for your agency are displayed in order of expiration date

Let's review the Expiration Report window and results that will be displayed.

## Modifying Multiple Active Agency Commitments (cont.)

Use the steps on the following table to view the steps for how to use the Expiration Report.

Name	Funding Type	Setup Date	Expiration Date	Amount	Agreement	Detail
ABC Customer	EHEAP	Oct 19, 2017	Dec 18, 2017	\$600.00		
<a href="#">ABC CUSTOMER</a>	EHEAP	Oct 19, 2017	Dec 18, 2017	\$100.00		
ABC CUSTOMER	EHEAP	Oct 20, 2017	Dec 19, 2017	\$1,029.54		
ABC CUSTOMER	EHEAP	Oct 20, 2017	Dec 19, 2017	\$23.00		

Step	Action
<b>Expiration Report</b>	
1	<b>View</b> commitment expiration dates and details
2	<b>Click</b> on blue active link for account that will be modified  <b>Result:</b> Request Commitment Extension window is displayed
3	<b>Select</b> submit to extend expiration date for 30 days  Successful commitment message is displayed
4	<b>Repeat</b> steps 1–3 until all commitments are complete

Your commitment was successfully extended.

**Important:** A commitment can only be **modified once**. If it has already been modified, the link for the customer's name will be in grey and will not be an active link.

This commitment will **not be able** to be modified. Contact your Area Manager for assistance.