



**eDEN**

Accountant **in** Bankruptcy

# **eDEN External Release Note v2.1**

**Released 30/04/2020**

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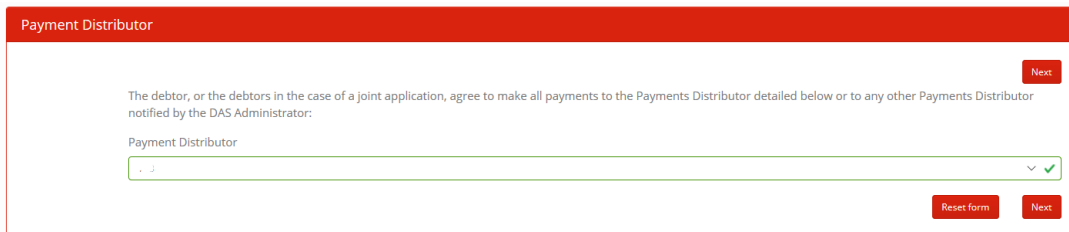
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# eDEN Release v2.1

## 1. Application

### 1.1 Preferred PD automatically populated on Application

If a Money Adviser (MA) Organisation has a Preferred Payment Distributor (PD), this can be updated on eDEN by AiB users, when an MA user is then completing an application the preferred PD will automatically populate onto the Payment Distributor section of the form:




The screenshot shows a form titled "Payment Distributor" with a red header. The main text reads: "The debtor, or the debtors in the case of a joint application, agree to make all payments to the Payments Distributor detailed below or to any other Payments Distributor notified by the DAS Administrator:". Below this is a label "Payment Distributor" and a dropdown menu with a green checkmark icon on the right. At the bottom right of the form are two buttons: "Reset form" and "Next".

Users can still select a different PD if required by selecting the dropdown on the page of the application form, a warning will show to let users know that this is not the preferred PD:

 Preferred Payment Distributor: (

but they will be able to continue with the form once they have confirmed the change to Payment Distributor:

---



### Update Payment Distributor

Are you sure you do not want to use your organisation's preferred payment distributor?

---

Preferred Payment Distributor:

## 1.2 Remove Debt Confirmation Letter from e-mail

When a Creditor organisation has their preferred contact method set as e-mail and debt confirmation has been requested on eDEN, the Creditor receives an e-mail to ask them to confirm the debt on eDEN. The e-mail had a document attached that was not needed therefore this has been removed.

The creditors now receives the below e-mail without a letter attached:

A debt on the case 2020/            requires your confirmation.

Sign into eDEN to view the details.

Yours sincerely

DAS Administrator

## 1.3 Re-request debt confirmation

When a user is re-requesting debt confirmation on an application, this was not working as expected. This release fixes debt confirmation so that, when a user selects re-request debt confirmation on an Accepted debt this extends the confirmation end period by 10 days, unless this exceeds the maximum confirmation period, which is 28 days from the original Confirmation Requested On date. Otherwise, this will set the confirmation period to the maximum confirmation period.

### Example 1

User requests confirmation for a debt on the **01/01/2020**.

System sets the confirmation period to end on the **22/01/2020**.

User confirms the debt on **15/01/2020**.

Money Adviser updates the debt and re-requests confirmation on the **16/01/2020**.

System sets the confirmation period end date to be **26/01/2020**.

### Example 2

User requests confirmation for a debt on the **01/01/2020**.

System sets the confirmation period to end on the **22/01/2020**.

User confirms the debt on **20/01/2020**.

Money Adviser updates the debt and re-requests confirmation on the **21/01/2020**.

System sets the confirmation period end date to be **28/01/2020**.

### Example 3

User requests confirmation for a debt on the **01/01/2020**.

System sets the confirmation period to end on the **22/01/2020**.

User confirms the debt on **05/01/2020**.

Money Adviser updates the debt and re-requests confirmation on the **11/01/2020**.

System does not change the confirmation period end date. It stays as **22/01/2020** as a 10 day extension from now would reduce the period.

#### 1.4 Debt status icon now showing on debt table

When an application is in draft and the debt section is showing as red it was sometimes difficult for users to know which debt is not complete:



The debt table now shows indicators to help users identify which debt still needs to be resolved, these indicators are now shown on the left of the debt table on the application form:

	Debtor(s)	Creditor
✓	[REDACTED]	[REDACTED]

x

#### 1.5 Attach mandate to Debt Payment Programme (DPP) proposal letters

When a new Personal Application is Issued, Proposal letters are generated for the Creditors on the case. If a Creditor has picked their preferred contact method as Post then letters are generated to be either be printed by the CMA or AIB, the Mandate of Authority that has been attached to the case also needs to be sent along with the Debt Payment Programme Proposal letters.

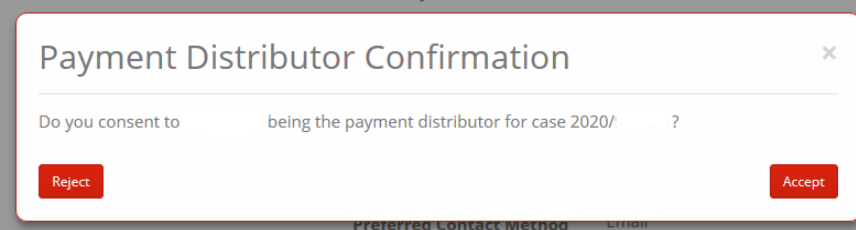
When eDEN now generates the Proposal letter the mandate that is attached to the case is also attached to the letter. If the debt is for joint debtors then both mandates will attach to the proposal letter, however, if the debt is for only one of the debtors on the case then the relevant mandate will be attached to the proposal letter.

## 1.6 All Payment Distributor users can complete PD Confirmation

All Payment Distributor users can now complete PD Confirmation. When a personal application is issued to creditors the case then appears in a tasklist list for the PD to confirm that they accept the case. Users can accept this by access the task list Applications Requiring Confirmation:

1 Applications Requiring Confirmation

Users can press on the item in the task list and then either Reject or Accept the confirmation:










If a user Accepts the Confirmation the company then becomes the Payment Distributor for that case.

## 2. Variations

### 2.1 Variation Debt Comparison





A new Debt Comparison section has been added to the bottom of the Variation Details page. Once a debt change variation has been created the debt comparison screen will show what changes are included within the variation:

Debt	Starting balance	Remaining amount	Starting balance after variation	Remaining amount after variation	Variation to starting balance
EE Customer Care - 	£884.00	£884.00	£0.00	£0.00	-£884.00
Lending Stream -	£502.00	£502.00	£502.00	£502.00	£0.00
Lloyds Banking Group (HBOS) - Unsecured Products - 	£2,983.18	£2,983.18	£4,000.00	£4,000.00	£1,016.82
Lloyds Banking Group (HBOS) - Unsecured Products - 	£2,249.36	£2,249.36	£1,000.00	£1,000.00	-£1,249.36
Loans 2 Go Ltd - 	£78.50	£78.50	£78.50	£78.50	£0.00
Elevate Credit (Sunny Loans) -	£33.00	£33.00	£33.00	£33.00	£0.00
Elevate Credit (Sunny Loans) - 	£95.00	£95.00	£95.00	£95.00	£0.00
O2 -	£23.00	£23.00	£23.00	£23.00	£0.00
O2 - 	£336.00	£336.00	£336.00	£336.00	£0.00
1 Month Loan - 	£0.00	£0.00	£500.00	£500.00	£500.00
<b>Total</b>	<b>£7,184.04</b>	<b>£7,184.04</b>	<b>£6,567.50</b>	<b>£6,567.50</b>	<b>-£616.54</b>

Results per page:

The columns show the Creditor name and reference number, the starting balance of each debt, the remaining balance of each debt, the starting balance once the variation is approved, the remaining balance once the variation is approved and the last column shows the actual change that is taking place within the variation.

Each Debt also shows a symbol to indicate whether the debt is increasing, decreasing, being added or being deleted all together:

-  - Indicates a debt increasing
-  - Indicates a debt decreasing
-  - Indicates a debt being added
-  - Indicates a debt being deleted

This table shows while the variation is Submitted and Issued, however the table does not currently show after the Debt Change Variation is approved.

## 2.2 Variation queued status and Crisis Breaks

When a variation is submitted and there is already another variation either Submitted, Issued or Requires Fair and Reasonable the new variations will now become Queued:

---

Status
Issued
Queued

---

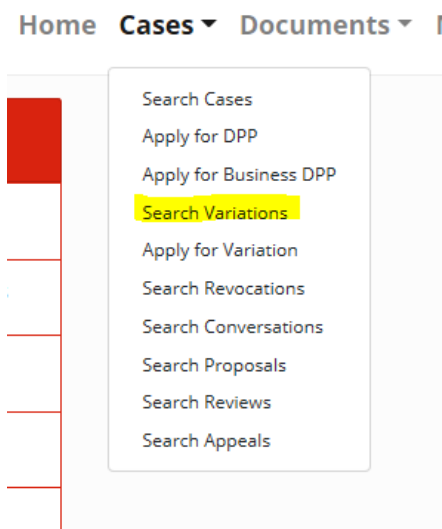
These Queued variations will await until the previous variation has been either Approved, Withdrawn or Rejected and then the next variation will Submit, Issue or Approve as appropriate.

If a Crisis break variation is submitted while another variation is in progress, the Crisis Break variation will ignore all other variations and take precedence over all of these:

Type	Status
Essential Credit	Issued
Contribution Change	Queued
Crisis Break	Approved

## 2.3 Variation Search Export

A user can search for Variations using the Variation search page, this can be found by selecting Cases from the main menu and then selecting Search Variations:



The user can then use the criteria to perform a search for variations:

DPP Reference

Statuses

Types

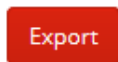
Created On  
From  To

Issued On  
From  To

Approved On  
From  To

Sort Order

Once the search has been performed the user can also then select the Export button on the search page:



This will open a spreadsheet with the following headings:

- Case Reference
- Variation Type
- Variation Status
- Created On
- Created By
- Issued On
- Decided On Date
- Last Updated Date
- Last Updated By
- Lead Debtor First Name
- Lead Debtor Surname
- Lead Debtor Date of Birth
- Lead Debtor Post Code
- Joint Debtor First Name
- Joint Debtor Surname
- Joint Debtor Date of Birth
- Joint Debtor Post Code

## 2.4 Cascade Variation Debt changes

Just now if a user submits a variation while another variation is in flight, once the first variation is accepted, the changes are not reflected in the second submitted variation. This was having an impact on the DPP, once the second variation was accepted all the changes made from the first variation were the being undone.

Now, once a variation is accepted this updates the case and any other variations that have been created on the case, meaning that no changes made by a variation will be undone once any subsequent variations are approved.

## 2.5 Next and previous variation buttons on variation details page

When a user is viewing the Variation details on a case they can move between the previous and next variations by using the arrow buttons rather than having to go back to the DPP screen. Users can access this by selecting a variation on the case page:

⇒ Variations	
Type	Status
Debt Change	Approved

And then using the arrows to navigate through the other variations on the case:

The screenshot shows the 'Variation Details' page. At the top, there is a header 'Variation Details'. Below it, a list of fields is displayed, including: Status, Type, Capacity (with a value of 'Money Adviser'), Created On, Created By, Created By - Organisation, Last Updated On, Last Updated By, Last Submitted On, Withdrawn On, Reason for Withdrawal, and Issued On. At the bottom of the page, there are three expandable sections: 'Type and Grounds', 'Composition', and 'Supporting Information', each with a right-pointing arrow. On the left and right sides of the page, there are navigation arrows (left and right) circled in red, indicating the ability to navigate between variations.

## 2.6 Variation Details screen - Created by Organisation field

When a user is creating a variation eDEN now records the organisation for that user. This field is now shown on the Variation details to make it clear which organisation has submitted a variation. Users can see this by accessing the variation on the case and viewing the variation details:

Created By

Created By - Organisation

## 2.7 Updated proposal amount applying to DPP

When a Money Adviser updates the Proposal Amount on a variation or on the Proposal on behalf of the Creditor these changes were recently not being reflected on the case once the Proposal or Variation was approved. These changes should now be reflected as appropriate in the DPP.

When making a change in a Variation the Money Adviser should now select to Modify the debt that they want to change:

Modify 

And then update the **Proposal Amount field** with the new Starting Balance for that debt, not the Amount Owed field:

Proposal Amount (£)


500.00

And then select to Update Debt:

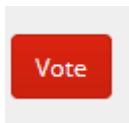
Update debt

## 2.8 Composition Proposal Creditor Letter Generation

When an offer of Composition Variation Type is Issued to Creditors, Creditor will see these cases in the task list 'Proposal Requiring Action'

 Proposals Requiring Action

If the user clicks on the item this will take them straight to the variation proposal page on the case. The user can click on the 'Vote' button next to the Debt they wish to vote on:



The Information shown on the Offer screen has changed so that all references of further payments have been removed:

## Offer

**Creditor Name**  
**Issued On**  
**Gross Remaining Debt**  
**Remaining AiB Fees**  
**Remaining PD Fees**  
**Total Fees Remaining**  
**Net Remaining Debt**  
**Percentage of Total Debt**

Also the information on the vote section has been changed to indicate that no further payments will be received if the creditor accepts the offer:

*This is an offer of composition, if accepted you will not receive any further payments and the remaining debt balance will be written off. Failure to respond to this proposal will result in your deemed acceptance of this proposal.*

The User can then vote on the Proposal in the same way that they would for any other variation.

Creditor – Composition Proposal letters also now generate to the Variation Proposal section of the case for each creditor with all the correct information.

## 2.9 Crisis Break Employer Letter Generation

On cases where the Debtors payment method is salary and a Crisis break Variation is approved an extra letter is generated for the Continuing Money Adviser or AiB to send to the employer.

Short Term Financial Crisis Payment Break - Approved - Letter To Employer - Cease Deductions for STFCPB Period - Post 04/11/2019_2020/11/2019/Madam.pdf	Short Term Financial Crisis Payment Break - Approved - Letter To Employer - Cease Deductions for STFCPB Period - Post 04/11/2019	A	Mc	06/04/2020	Details
---	--	---	----	------------	---------

This letter will show in the CMAs tasklist for Letters to Issue.

## 2.10 Weekly and Fortnightly Payment Break and Crisis Break

When a Payment Break or Crisis Break is approved for a case that doesn't have a monthly contribution this was not removing the correct amount of instalments from the Payment Schedule. This has now been updated and Payment and Crisis Breaks take into account the Payment frequency of the case when removing the instalments from the payment schedule.

Users will see a message when creating a Crisis Break to confirm the number of instalments they would like to apply for between 1 and 4 if the debtor is paying weekly:

### Crisis Break Length

Num of Instalments

Num of Instalments must be between 1 and 4

The user will also be asked for the number of instalments they are applying for when creating a payment break the user should enter the number of weeks they would like the payment break to be:

### Payment Break Length

Num of Instalments

The Payment Break and Crisis break variations do not take into account the first payment on the case, if the user would like to remove the first payment this will need

to be done manually through the Payment Schedule by selecting the first payment and then selecting to delete the payment at the bottom of the page:

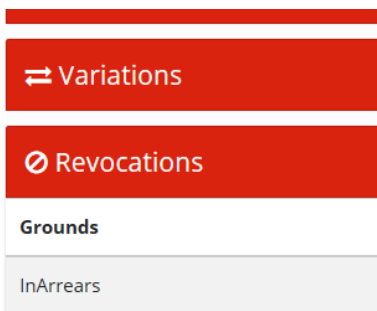
[Delete](#) | [Amend](#)

### 3. Revocations

#### 3.1 Revocations Decided On and Decided By

Within the Revocation details on a case a user can now see who made the revocation decision and when the decision was made.

Users can access this by selecting the appropriate Revocation from the list of revocations on the case:



The user is then taken to the Revocation Details page where they can view who made the decision on the Revocation and when the decision was made:

**Who Approved**

**Who Rejected**

**Approved On**

**Rejected On**

The summary screen on DPP details also now show the Decision date:

A red header bar with a white circle containing a diagonal slash icon and the text 'Revocations'. Below it is a table with five columns: 'Grounds', 'Status', 'Created By', 'Created On', and 'Decided On'.

Grounds	Status	Created By	Created On	Decided On
---------	--------	------------	------------	------------

### 3.2 Revocation Awaiting Issue status

If a revocation is submitted and there is already another revocation either Issued to Creditors, Awaiting Information or Awaiting Decision the new revocation will now become Awaiting Issue:

#### Status

Issued To Creditors

Awaiting Issue

The revocations Awaiting Issue will await until the previous revocation has been either Rejected or Withdrawn and then the next revocation will Issue to Creditors.

If a Revocation is submitted with the Grounds 'The debtor is deceased', 'The debtor has become Sequestrated' or 'The debtor has entered into a Protected Trust Deed' this revocation will show a status of Submitted to AiB regardless of any other outstanding revocations:

Grounds	Status
FalseStatement	Issued To Creditors
InArrears	Awaiting Issue
DebtorSequestrated	Submitted To Aib

### 3.3 Revocation change to layout of grounds

The layout of the grounds have changed to make it easier for users to see all options available. The criteria for the ground 'The debtor failed to satisfy a standard condition under regulation 27 or 28' is now shown when the user selects to create the revocation rather than the user having to select the ground before the criteria is available:

<input type="checkbox"/>	The debtor(s) failed to satisfy a standard condition under regulation 27 or 28.
<input type="checkbox"/>	The debtor(s) made a false statement in their application.
<input type="checkbox"/>	The debtor(s) failed to make the agreed instalment under the DPP and they are currently in arrears of an amount equal to the aggregate of payments due in a period of two months beginning after the last payment is made.
<input type="checkbox"/>	The condition for a joint DPP as specified in regulation 22(1) or (2) no longer apply.
<input type="checkbox"/>	The debtor (s) is deceased
<input type="checkbox"/>	The debtor has become Sequestered
<input type="checkbox"/>	The debtor has entered into a Protected Trust Deed

Revocation Ground is required

The debtor(s) failed to satisfy a standard condition under regulation 27 or 28.	
Failure Criteria	
Selected	Criteria
<input type="checkbox"/>	Failed to make first payment within 42 days of approval
<input type="checkbox"/>	Failed to make payments when due
<input type="checkbox"/>	Failed to pay continuing liability
<input type="checkbox"/>	Made additional payments to a creditor outwith DPP
<input type="checkbox"/>	Applied for/obtained unpermitted credit
<input type="checkbox"/>	Failed to notify change of address
<input type="checkbox"/>	Failed to notify change in material circumstances
<input type="checkbox"/>	Failed to provide requested information or evidence
<input type="checkbox"/>	Failed to make agreed permitted credit payments
<input type="checkbox"/>	Failed to give notice/intimations as required
<input type="checkbox"/>	Failed to complete tax or duty return
<input type="checkbox"/>	Failed to notify of Money Adviser ceasing to act
<input type="checkbox"/>	Failed to comply with a discretionary condition

If the user selects a Failure Criteria for this ground the Ground above will automatically be selected.

Grounds	
Selected	Criteria
<input checked="" type="checkbox"/>	The debtor(s) failed to satisfy a standard condition under regulation 27 or 28.
<input type="checkbox"/>	The debtor(s) made a false statement in their application.
<input type="checkbox"/>	The debtor(s) failed to make the agreed instalment under the DPP and they are currently in arrears of an amount equal to the aggregate of payments due in a period of two months beginning after the last payment is made.
<input type="checkbox"/>	The condition for a joint DPP as specified in regulation 22(1) or (2) no longer apply.
<input type="checkbox"/>	The debtor (s) is deceased
<input type="checkbox"/>	The debtor has become Sequestered
<input type="checkbox"/>	The debtor has entered into a Protected Trust Deed

The debtor(s) failed to satisfy a standard condition under regulation 27 or 28.

Failure Criteria	
Selected	Criteria
<input checked="" type="checkbox"/>	Failed to make first payment within 42 days of approval

### 3.4 Revocation grounds and failed criteria selected case check

The case will now check if certain Revocation grounds and failure criteria are true when they are selected.

If a user creates a revocation and selects the Failure Criteria 'Failed to make first payment within 42 days of approval' the case will check to make sure 42 days have passed since the case was approved and will also check to make sure the first payment has not been made. If neither of these are true there will be a warning shown on the bottom of the page and the create revocation button will be greyed out so that users cannot create the revocation:

The debt payment programme must be approved over 42 days ago with no payments since for this type of revocation. 

Create Revocation

If a user creates a revocation and selects the Failure Criteria 'Failed to make payments when due' the case will check to make sure that payments have either been missed or were not made on the date scheduled. If all payments have been made in line with the schedule there will be a warning shown on the bottom of the

page and the create revocation button will be greyed out so that users cannot create the revocation:

The debt payment programme must be missing payments for this type of revocation. ⓘ

Create Revocation

If a user creates a revocation and selects the Grounds 'The debtor(s) failed to make the agreed instalment under the DPP and they are currently in arrears of an amount equal to the aggregate of payments due in a period of two months beginning after the last payment is made.' The case will check to make sure the payments made are missing a total value of 3 months missed payments, if they are not a warning is shown on the bottom of the page and the create revocation will be greyed out so that users cannot create the revocation:

There must be 3 missed payments or underpayments that total 3 months worth of payments to select this revocation ground. ⓘ

Create Revocation

## 4. Tasklists

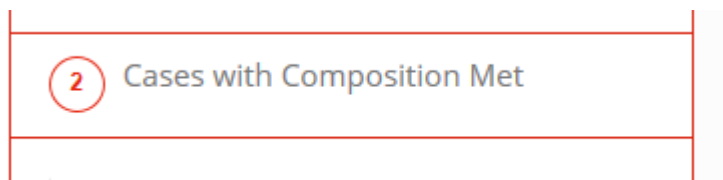
### 4.1 Approved Applications tasklist

#### Approved Applications

Once an application is approved the case will show on this list. When the Payment Distributor Confirms the Payment Details the case will then fall off this tasklist. Who sees this tasklist – AiB, Payment Distributors, Money Advisers, Creditors

### 4.2 Cases with composition met tasklist

Money Adviser and AIB users will be able to view a task list named Cases with Composition Met:



This task list will shows cases that meet the following requirements:

- Case is Live
- Case has been live for 12 years (Excluding Payment and Crisis Breaks)
- Seventy Percent of the Original Debt has already been paid.

### 4.3 Closure Task Lists

#### Cases Due to Complete

Cases will show in this task list when the Projected End Date is within 2 months of today's date. Once the case has a remaining balance of £0 the case then falls out of this tasklist and will show in the Cases that can be closed tasklist.

Who can see this task list – AiB and Payment Distributor

#### Cases That Can Be Closed

Cases will show in this task list when the Remaining Balance is £0 and the case is ready to be closed. Once the case has been closed the case then fall out of this tasklist and will show in the Completed Cases tasklist.

Who can see this tasklist – AiB and Payment Distributor

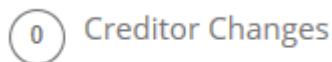
#### Completed Cases (Previously names Cases Recently Closed)

Cases will show in this tasklist when the case has been closed within the last month. Once the case has been closed for longer than a month the case then falls out of this tasklist.

Who can see this tasklist – AiB and Payment Distributor

### 4.4 Creditor Changes Tasklist Removal

User will no longer see the Creditor Changes tasklist on their home screen.:



0 Creditor Changes

---

All creditor changes made after the case is Approved will create a Conversation on the case and now show in the Conversation task list instead:



35 Conversations

---

### 4.5 Appeal tasklists

#### Open Appeals

When an appeal is created on a Review this shows in the Open Appeal tasklist. The case falls off once the appeal outcome has been recorded.

Who can see this tasklist – AiB, Money Adviser and Creditor

## Appeal Outcome

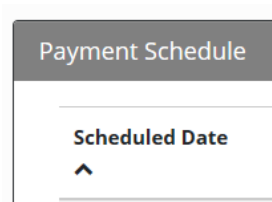
Once a Decision has been recorded on an Appeal the case will show in the appeal Outcome tasklist. Known issue - tasklist shows all appeals outcomes at present, in a future release there will be an acknowledge function to allow users to mark the appeal as seen and this will then fall off the tasklist.

Who can see this tasklist – AiB

## 5. Payments

### 5.1 Sort function for Payment Schedule

The Payment Schedule now has a sort function on the 'Scheduled Date' users can sort the payments into ascending or descending order by pressing on the arrow on the screen:

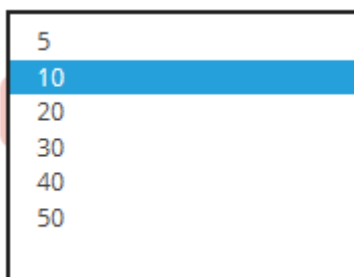


The Payment Schedule has also be filtered to only show the first 10 payments on the schedule. Users can change the payments shown on a page to 5,20,30,40 or 50 by selecting the 'Results per Page' from the bottom of the screen:

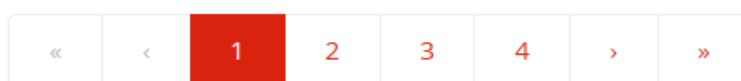
Results per page:

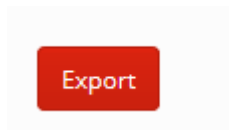
And then selecting the amount they would like to see:



Users can also see more payments by using the page navigation at the bottom of the screen:

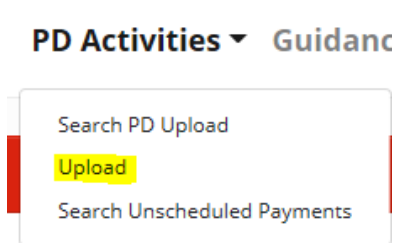


The Export button can also be used on this page to export a full list of all payments within the schedule:

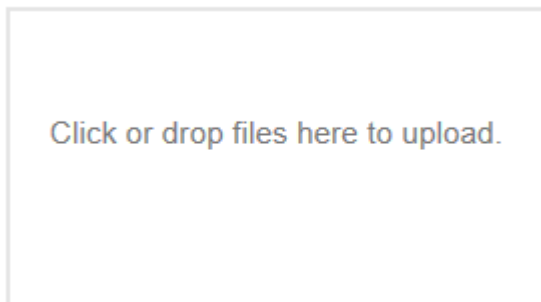


## 5.2 PD payment upload more than 101 rows

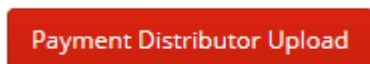
Payment Distributor users were having difficulty uploading payments that had more than 100 rows in the spreadsheet. This has now been updated so that more rows can be uploaded when completing the PD Upload (over 1,000 rows). Payment Distributor users can upload payments by selecting PD Activities from the top menu and selecting Upload:



Users can then upload a spreadsheet onto the upload box:



and select Payment Distributor Upload button:




The spreadsheets must have the following columns:

- Case Ref
- PD Ref
- Client Name
- Payment Value
- Payment Date Payment Type

And saved as a Microsoft Excel Comma Separated Values File.

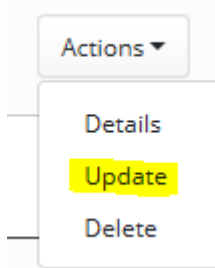
Once the File has been uploaded the user will see a screen with all the details, the screen will highlight if there are any details that eDEN does not recognise:

Status	Case Ref	PD Ref	Client Name	Payment Value	Payment Date	Payment Type	Errors	Actions
Valid	2019/01/01	2019X01/01	Testing Payment	300	28-01-2020	UnScheduled		Actions ▾
Invalid	2019/01/01	23456	Confirm format	100.5	21-01-2020	UnScheduled		Actions ▾

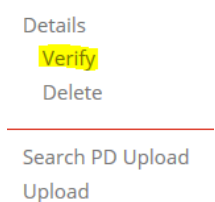
Users can find out what the errors are by clicking on the red warning sign on the right of the item:



Users can then update the details by selecting Actions from the right of the screen and selecting update:




This will allow the fields to be changed and updated. Once all items no longer have any warning users can then press the Verify button on the top left of the screen:



And confirm that the PD Upload has been verified. This changes the status to Unprocessed Verified. All unprocessed files get picked up overnight and will be processed.

The upload will then change status to either Processed All Successful or Processed Some Failures. If there have been some failures the details of the failures can be found on the upload details:

Payment Type	Errors
Scheduled	
Scheduled	
Scheduled	
Scheduled	
Scheduled	
Scheduled	

Any Scheduled payment should now successfully show on the case. Any unscheduled payments should then be updated by accessing the Search Unscheduled Payments, each item can then be selected and the user can pick to:

- Paid As Scheduled Payment
- Paid As Ad Hoc Payment
- Paid As Partial Settlement Payment

The payment is then shown on the case.

### 5.3 Amend and Delete Debtor Payments

AiB and Payment Distributor users can amend and delete debtor payments from the payment schedule. Users can select the payment and then select the Amend or Delete button from the bottom of the page:

[Delete](#) | [Amend](#)

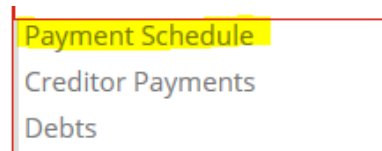
If the payment is deleted the Creditor Payments that go along with that payment is also deleted. If the user selects to amend they can update:

- Paid Amount
- Marked as Paid
- Paid Date
- Scheduled Amount
- Scheduled Date
- Marked as Missed
- Marked as Disregarded

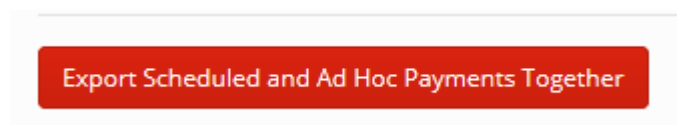
If a payment is marked as Paid the relevant Creditor payments will then show relating to that payment. If the paid field is unticked the relevant creditor payments will no longer show on the case.

## 5.1 Export both Scheduled and Ad Hoc Payments

Users can now export all payments made to a case. If the user accesses the Payment Schedule from the left side of the screen:



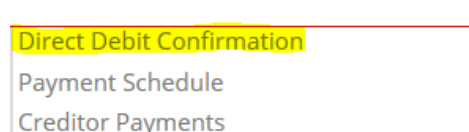
They can see all Payments in the Payment Schedule and any ad hoc payments that have been made. At the bottom of this screen there is now a button visible to Export Scheduled and Ad Hoc Payments Together:



If a user selects this an Excel document then opens showing all scheduled payments and also all ad-hoc payments at the bottom of the sheet.

## 5.2 Direct Debit confirmation for AIB as PD cases

If a case has AiB as the Payment Distributor and the Debtor has selected Direct Debit as their payment method, once the debtor has confirmed their payment details, they can view the Direct Debit Confirmation from the left side of the case:

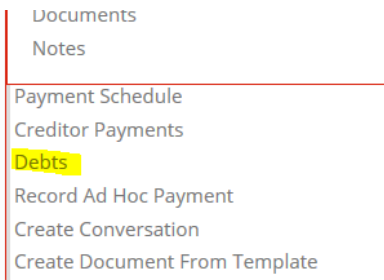


The debtor can select the Direct Debtor Confirmation link and view the details of the confirmation at any point.

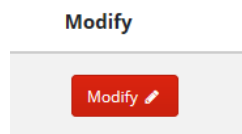
## 6. General

### 6.1 Held debt Update screen link not showing for some users

If a Payment Distributor has to hold a debt on a case for any reason, the functionality is available on the Update Debt section. The user should access the debt section on the case:



Then press the Modify button next to the specific Debt:



This will show a screen where you can tick if the debt is a the Held Debt:



A screenshot of a form titled 'Update debt'. The form contains the following fields:

- Creditor Sort Code:  ✓
- Creditor Account Number:  ✓
- Creditor Reference Number:  ✓
- Held Debt:  - Yes (circled in red)
- Held Funds Reason:  ✓

At the bottom right of the form is a red button labeled 'Update debt'.

Once this has been ticked a Held Debt Reason must be entered:

Held Debt

- Yes

Held Funds Reason

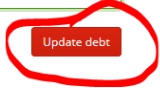
Held Funds Reason ✕

Held Funds Reason is required

Once a Reason has been entered the Update Debt button can then be selected.

Held Funds Reason

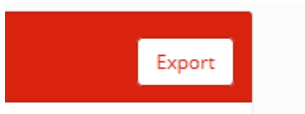
Wrong Bank Account Details ✔



The user will then be able to see any cases that have been marked with a held debt on their home screen:

13	Cases With Held Debts
50+	Completed Cases
50+	Cases Due To Complete
3	Cases That Can Be Closed

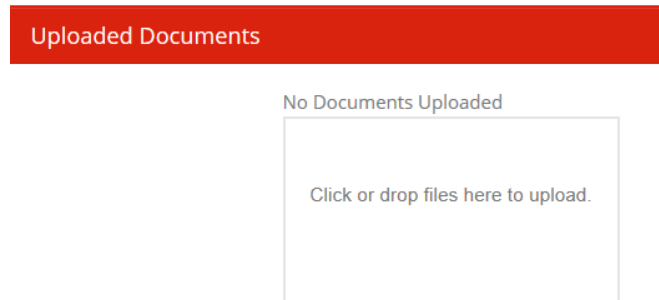
Users will be able to click on each item within the task list to be taken to the relevant Case. Users can also export a spreadsheet of this tasklist by pressing Export on the top right corner of the task list:



## 6.2 Bulk Transfer uploaded Documents

When a user Creates a Bulk Transfer they have the ability to add a document. Users can now download the document that has been attached to the Bulk Transfer so that they can view the content within the document.

A document can be attached to the Bulk Transfer by either dragging and dropping the document into the box, on the create bulk transfer page, or by clicking on the box and then selecting the file from your computer:

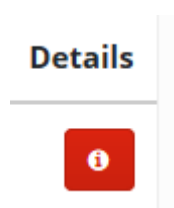


Once the Document is attached to the bulk transfer it can be viewed from the Bulk Transfer Details page:

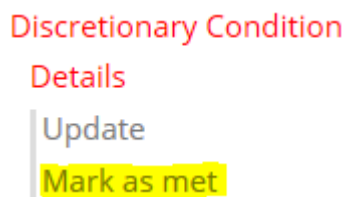
Uploaded Documents	
Name	Type
Blank.docx	Transfer Agreement

### 6.3 Removed MA ability to mark discretionary condition as met

AiB users have the ability to mark a Discretionary Condition as met. Users can mark a Condition as met by selecting the Details button beside the specific condition:



And then selecting 'Mark as met' from the left of the screen:



This ability has been removed from money adviser users. Money Advisers should create a conversation with AiB to indicate if a Condition has been met.

Create Conversation

#### 6.4 Organisation with more than one type

An organisation can now have more than one type attached to it. This means that users who complete both the Money Advice and Payment Distribution functions do not need to have more than one login. If users wish to change their login please contact [eDENenquiries@aib.gov.uk](mailto:eDENenquiries@aib.gov.uk).

#### 6.5 Parent and Child Organisations

Similar to above, there are some companies that have staff working for more than one branch of an organisation, which means they need to have different logins for the different branches. This new functionality means that an overarching Parent organisation can be added to eDEN allowing users for that organisation to see all child organisations attached to it.

Once set up correctly users can have one login which will allow them to see all cases for the Parent organisation and all the child organisations, or if users have been set up on the child organisation then the user only sees these cases.

If users wish to change their login please contact [eDENenquiries@aib.gov.uk](mailto:eDENenquiries@aib.gov.uk).

#### 6.6 Programme Start Date blank until Payments Details Confirmed

When a case is approved the Programme Start Date on the main case page was showing the same date as the Approved On date.

Application Issued	03/02/2020
Approved On	14/02/2020
Programme Start Date	14/02/2020

This has now been changed and the date will show as blank until the Payment Details have been confirmed on the case. Once details have been confirmed the start date will now show the First Payment Date.

## 6.7 Minor Creditor 'Other' option added back to Create and Update Debt

When a user selects to create a debt the Creditor Name now automatically populates with the name 'Other' this then allows the user to create a new creditor organisation where the user can enter the new details below:

Creditor Name

Name

Name is required

If the debt is for an organisation that is already stored in eDEN the user can select the dropdown option on the Creditor Name and either scroll to find the correct organisation or start typing the organisation name and then selecting the correct organisation:

Creditor Name

- New Age Fitness
- New College**
- New Easterhouse
- New Gorbals Hou

Users can also update the organisation by selecting the creditor name and then typing 'Other' and selecting this from the dropdown options, this then allows the user to enter the details to create a new organisation.

If a user enters new organisation details this then shows in a task list for AiB to check. If the organisation is approved this will now show in the dropdown list in eDEN. If the organisation is Rejected this does not show in the dropdown list and just shows on the one case it has been applied to.

## 6.8 Guidance page link on eDEN

A new link has been added at the top of the screen. If the user presses the Guidance link:

### Guidance

This then opens a new web page and directs the user to the AIB website guidance page:

<https://www.aib.gov.uk/guidance/debt-arrangement-scheme#guidance>

From here the user can then find Publications, Guidance, Legislation, Forms, Business DAS Information and eDEN information and release notes:

## Debt Arrangement Scheme

Publications

Guidance

Legislation

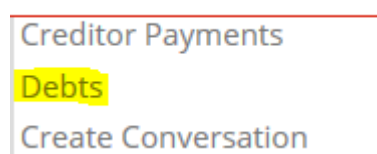
Forms

Business DAS

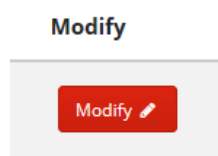
eDEN

### 6.9 Creditor access to update reference number

A creditor can now update the reference number of their debts on the DPP Case. Users can access this by pressing the Debt section on the left of the DPP Screen:



The User can then select the Modify button next to the debt that they would like to update:



On the Modify Debt page the Creditor user will then be able to update the Sort Code, Account Number or the Reference Number for that particular debt:

Creditor Sort Code

Creditor Account Number

Creditor Reference Number

Once they have entered the new details and press the update debt button on the page, the new detail are held on the debt on the case:

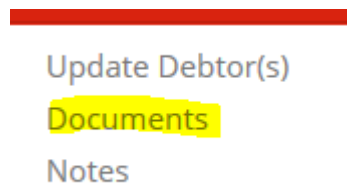


Once the creditor has made a change to the details a Conversation is created in the case and sent to the Payment Distributor. The Conversation holds the previous details and the updated details of the fields that have been updated:

The Creditor Details have been updated on a debt for case 2007/1 for Creditor  
- Unsecured Products. Previous Creditor Reference Number: .  
New Creditor Reference Number: Previous Creditor Sort Code : . New Creditor Sort Code :

### 6.10 Select Download more than one document

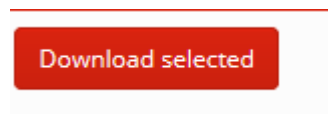
A user can now select to download more than one document at a time. Users can find the Documents section on the left of the DPP screen:



Users can then select the tick box next to any document that they wish to download:

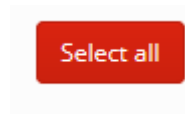
Actions	Selected
Details	<input checked="" type="checkbox"/>
Details	<input type="checkbox"/>

If the user wishes to download more than one document then they can tick all relevant documents and press the Download Selected button at the bottom of the page:

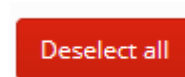


This will open up all selected documents on the case for the user to view.

If the user would like to download all documents on the case then they can press Select all from the bottom of the screen:



This will tick all documents on the case ready for the user to Download selected. The user can also then untick any document they don't wish to be downloaded or press the deselect all button if they don't want to see all documents:

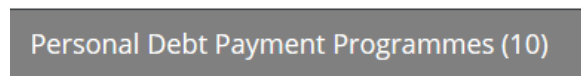


### 6.11 Quick search results for more than one case

The Quick search can be used to match cases on exactly matching any of the following individual fields on a case:

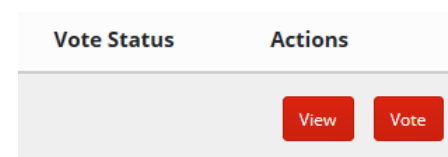
- Case Reference
- Lead Debtor Surname
- Joint Debtor Surname
- Lead Debtor Forename and Surname
- Joint Debtor Forename and Surname
- Lead Debtor Postcode
- Joint Debtor Postcode

If the surname is entered into the quick search and there is more than one case that matches, the user will be redirect to the Main search page where the results will show all cases that match the surname search:



### 6.12 Vote on Proposal button

Users can now request to Vote on a Proposal from the Details screen without having to select the view button and then the Vote option. Users can access the Proposal Offer page and under actions there is now a 'Vote' button on the right of the page:



If a User selects the Vote button they are taken to the full Proposal Offer details page and at the bottom of the page the voting options are available:

Vote on Proposal Offer

Do you accept the Proposal offer of £13.86 every Month as a payment of the debt amount owed to you? Please choose from the voting options below:

Vote

Please select an option

Vote is required

Please provide any voting related comments below:

Comments

Cast Vote

### 6.13 PD Notification of creditor change

If a Money Adviser, Creditor or AiB user update details on a debt there is a conversation created on the case and sent to the Payment Distributor. The conversation shows the user the Previous information and the new information on the conversation:

(AiB) 1:33 pm

UNREAD

The Creditor Details have been updated on a debt for case 2007/ for Creditor  
Unsecured Products. Previous Creditor Sort Code : . New Creditor Sort Code :  
Previous Creditor Account Number : . New Creditor Account Number :

### 6.14 Mark debtor as deceased

Money Adviser and AiB users can mark a debtor as deceased by selecting the Update Debtor link on the left side of the screen and selecting Mark As Deceased:



- Update Debtor(s)
- Details
- Contact
- Mark As Deceased
- Documents
- Notes

This will then let the user mark if the lead debtor or joint debtor is deceased. Once the user ticks this they are then asked to supply the date of death and shown a warning to indicate a revocation will be created:

**Debtor Deceased**

Marking the Debtor as deceased will create a deceased debtor revocation

Is Lead Debtor Deceased  - Yes

Lead Date Of Death   

Is Joint Debtor Deceased  - Yes

[Reset form](#) [Next](#)

Once this is completed a Revocation is created with the information and the user is taken to the revocation screen so that they can submit the revocation to AiB.

### 6.15 All Notes now show in DPP Notes Section

Notes can be added to different sections around eDEN and sometimes user don't know there is a note in a certain place on the system. The Notes section on the DPP screen has now been updated so that all notes can viewed in the same area. Users can access this by selecting Notes from the left of the DPP screen:

- [Update Debtor\(s\)](#)
- [Documents](#)
- [Notes](#)**

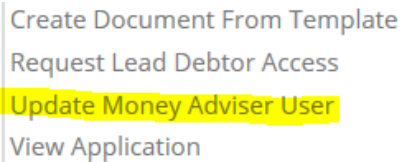
Users will then see the sections on eDEN where notes can be added and access all the notes from here:

- Notes
- [Debt Payment Programme Notes](#)
  - [Personal Application Notes](#)
  - [Variation Notes](#)
  - [Proposal Notes](#)
  - [Debt Notes](#)
  - [Review and Appeal Notes](#)
  - [Revocation Notes](#)

Each note will still be available from the specific section but will also now be available in this notes area.

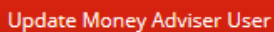
## 6.16 Update Money Adviser User

It is now possible for Money Adviser and AiB users to update the named Money Adviser on a case. Users can do this by clicking on the Update Money Adviser User link on the left of the DPP screen:



Create Document From Template  
Request Lead Debtor Access  
**Update Money Adviser User**  
View Application

The user can pick another money adviser from their organisation from the dropdown list. Once the correct Money Adviser has been selected the user can then select to Update Money Adviser User:



Update Money Adviser User

This new money adviser will now receive all e-mails regarding the specific case.

## 7. Business DAS

This release includes many changes to the Business DAS workflow. A user should now be able to complete a Business DAS Application, create users for the individuals, create variations on a Business DAS case and complete a Business DAS case.