



**eDEN**

Accountant **in** Bankruptcy

# **eDEN External Release Note v2.3**

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# eDEN Release v2.3

## 1. Payments Distributor

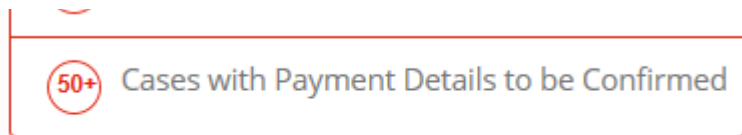
### 1.1 Automatic accept nomination of PD at point case is issued for AiB and CMAs

The process for cases being accepted by the Payments Distributor has changed so that when the money adviser in the case is also the same organisation as the payments distributor, there will no longer be a need to accept the case through the 'Applications Requiring Confirmation' task list, these will be automatically accepted.

If the money adviser is not the payments distributor then the case will still appear in the tasklist and require acceptance.

### 1.2 New Tasklist – Payment details need to be confirmed

AiB and Payments Distributor users now have an additional task list for cases requiring payment confirmation from the debtor:



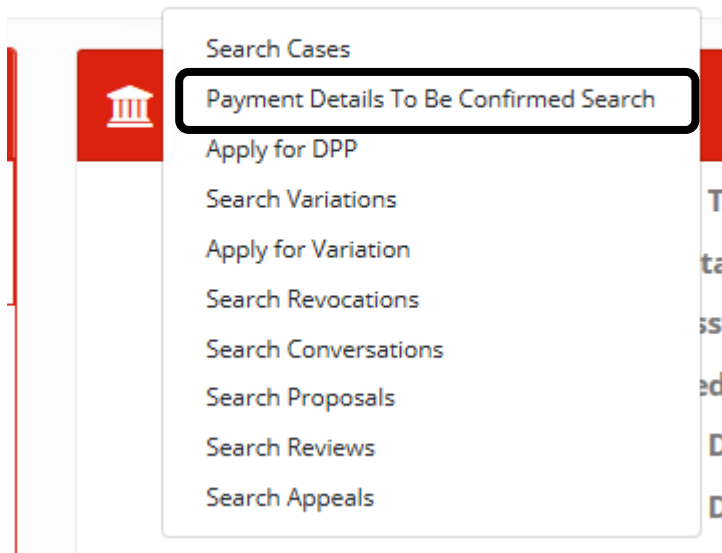
In addition to newly approved cases, if the case has been transferred from a different payment distributor, it will also appear within this task list.

The list contains the case reference number, debtor names and date of approval. The results can also be exported to a spreadsheet.

Once payment details have been confirmed in the case, the item is removed from the task list.

### 1.3 Ability to search for cases where payment details need to be confirmed

Within the 'Cases' drop down menu, there is now an entry for 'Payment Details To Be Confirmed Search':



This is available to AiB and Payments Distributor users.

When selecting the search, the user can either enter an 'Approved On' date range or carry out a blank search which will return all cases where payment details need confirmed:

A screenshot of a search interface. At the top, there is a red header with the word 'Search'. Below this, there is a form with two date input fields labeled 'From' and 'To', both with calendar icons. Above the 'From' field is the text 'Approved On'. Below the date fields are two buttons: 'Reset' on the left and 'Export' and 'Search' on the right. At the bottom of the form area, there is a grey bar with the text 'Debt Payment Programmes (53)'.

If the case has been transferred from a different payment distributor, it will also appear within this search so that payment details can be confirmed with the new PD.

The search results show the following fields for each case:

Case Reference	Case Type	Approval Date	Status	Debtor Name(s)	Payment Distributor
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The results can also be exported.

## 1.4 Search for Held Debt by Payments Distributor

Within the case search, there is now an option to select to allow all cases with held debts to be found:

 Has Held Debt

As this is within the 'Case Search', all other filters can also be applied, including searching by PD Name:

 Payment Distributor

## 1.5 'Please Wait.../Loading' prompt to appear when user confirms payment details

There were some instances where a user had clicked away from the screen too early after confirming the payment details resulting in the payment schedule populating but the option still being available to 'Confirm Payment Details'. To prevent this happening in future a prompt now appears to inform the user to wait until the process has completed.

## 1.6 Disclaimer regarding payments made showing on system

Within the Payment Schedule, there is now a disclaimer at the top of the schedule advising that it can take up to 5 working days for funds to clear:

Payment Schedule

Please note that it can take up to 5 working days for funds to clear and your payment schedule to be updated on eDEN.

It is visible for AiB, Payments Distributors, Money Adviser and Debtor Users.

Within the Creditor Payments, there is now a disclaimer at the top of the page advising that it can take up to 10 working days for the creditor to receive the payment:

Creditor Payments

Please ensure you have provided correct bank account details for receipt of funds.  
Distribution will be made within 10 working days of the scheduled payment date to allow time for client payments to clear.

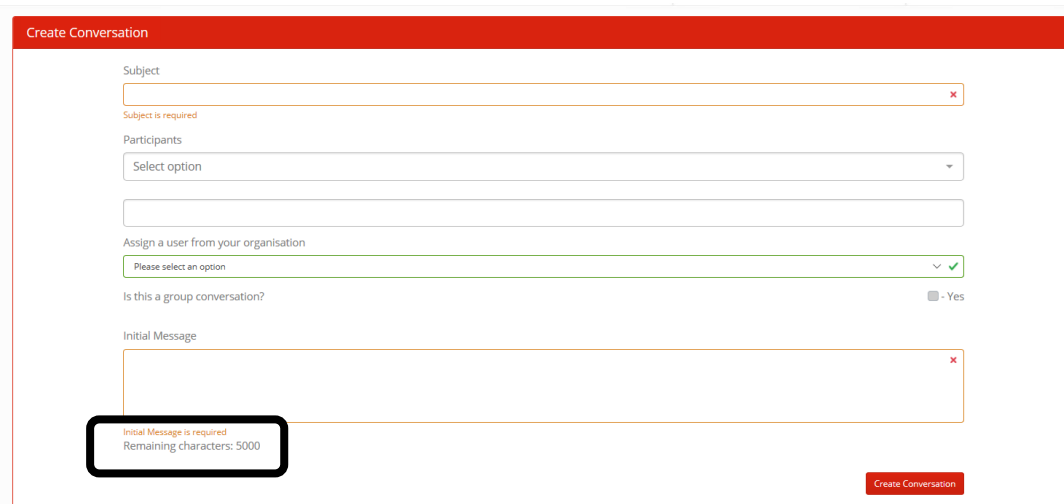
This is visible for AiB, Payments Distributors, Money Advisers and Creditors.

**\*\*These messages should only be visible for cases where AiB but is currently showing in all cases. This will be rectified in a future release.\*\***

## 2. General

### 2.1 Increase word count on first conversation

When creating a conversation the character limit of the first conversation previously was 250 characters. This has now been adjusted to allow the first conversation as well as subsequent replies to contain 5000 characters each:



The screenshot shows the 'Create Conversation' form. The 'Initial Message' field is highlighted with a black box, and a tooltip indicates 'Initial Message is required' and 'Remaining characters: 5000'. Other fields include 'Subject', 'Participants', 'Assign a user from your organisation', and 'Is this a group conversation?'.

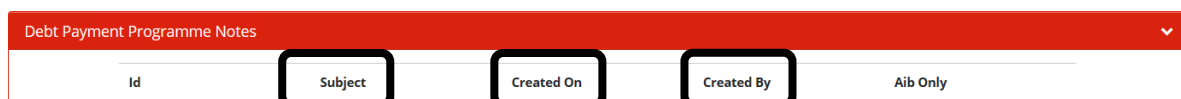
### 2.2 Joint Debtor details not migrated from DASH on some cases

In some DASH cases, the user had not confirmed that it was a joint case within the case page but had added in details for joint debtors. As a result these did not migrate to eDEN as joint cases. All cases identified have now been amended in eDEN to show joint details.

### 2.3 Debt Payment Programme Note Sorting

Within the 'Debt Payment Programme Notes' and the 'Personal Application Notes', as well as the notes section of the Personal Application, the note sort function has been fixed.

Notes can be sorted into ascending or descending order based on either the Subject, Created On date or Created By fields. In order to sort, the relevant header should be selected:



The screenshot shows the header for 'Debt Payment Programme Notes'. The 'Subject', 'Created On', and 'Created By' headers are highlighted with black boxes, indicating they are the available sorting options.

### 2.4 Missed Payment Counter on payment schedule screen

Within the Payment Schedule, there is now a counter for the number of missed payments:

Payment Schedule	
Remaining Debt	£11,753.06
Number of Regular Payments	55
Instalment Amount	£211.30
Final Payment Amount	£131.56
Debtor Payment Schedule Status	Ahead Of Schedule
Number of Missing Payments	1

If a payment has been recorded as missed, the counter increases by one, if that missed payment is later disregarded, the counter will then reduce. This shows the total number of payments that have been missed but not yet disregarded.

Where there have been under payments or missed payments, a total arrears amount shows below the number of missed payments. The total arrears will only show if there are arrears in the case, so if the debtor misses payments but then makes ad-hoc payments to cover the missed payments, there will be no arrears. This also takes into consideration any overpayments:

Payment Schedule	
Remaining Debt	£24,081.65
Number of Regular Payments	78
Instalment Amount	£308.44
Final Payment Amount	£23.33
Debtor Payment Schedule Status	Behind Schedule
Number of Missing Payments	1
Total Arrears	£308.44

### 3. Financial Details

#### 3.1 Financial details not held when provided by a creditor debt confirmation

Previously when a creditor provided financial details in their debt confirmation, the details were not held, this has now been amended so that when a creditor provides a sort code and account number when confirming their debt level, the details are stored and move over to the proposal and the DPP after approval.

#### 3.2 Financial details available for completion when rejecting proposals

When voting to reject a proposal offer, previously creditor did not get the option to confirm their financial details that should be used if the DPP is approved. This has now been amended so that the sort code and account number are available to be updated by a creditor or AiB/money adviser on behalf of the creditor:

Do you accept the Proposal offer of £39.00 every Month as a payment of the debt amount owed to you? Please choose from the voting options below:

Vote  
Reject

Does another company now manage this debt?  - Yes

Debt Reference Number  
124

Sort Code  
10

Account Number  
20

Please provide any voting related comments below:

Comments

Comments is required

Cast Vote

Any details provided within the vote will be transferred to the DPP if the application/variation is approved

### 3.3 Restrict sort code and account number fields to 6 and 8 characters

The sort code and account number fields within the debts and within organisation financial details have now been restricted. A sort code must not contain spaces or characters other than numbers to allow a full sort code of 6 numbers to be entered. An account number has been restricted to 8 characters:

#### Sort Code

Sort Code cannot have more than 6 characters

#### Account Number

Account Number cannot have more than 8 characters

## 4. Tasklists

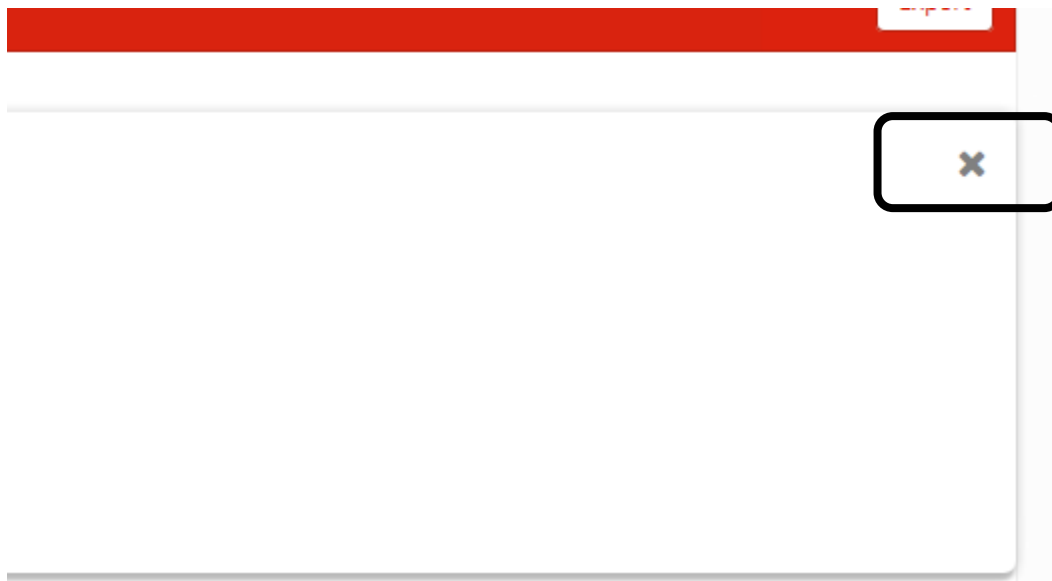
### 4.1 Acknowledge function to remove cases from Tasklist

Within the task lists of eDEN, there are some lists which are just for information. Previously the item within the list would remain until the time period had lapsed or the case expired.

The task lists where items can now be removed are:

- Approved Variations (AiB/MA/CMA/PD/Creditor)
- Approved Revocations (AiB/MA/CMA/PD/Creditor)
- Approved Applications (AiB/MA/CMA/PD/Creditor)
- Rejected Revocations (MA/CMA/Creditor)
- Received Reviews (AiB/Creditor)
- Action Required due to review (AiB/MA/CMA/PD/Creditor)
- Payment Break Ending (AiB/MA/CMA/PD/Creditor)
- Cases requiring annual review (CMA)

There is a cross in the top right hand corner of the item within the list:



Once the cross has been selected the item will be removed from the list. **This action is permanent and cannot be undone.** Please also note that sometimes the item will not disappear until the page has been refreshed.

#### 4.2 Discretionary Condition Tasklist

The discretionary condition task list was not showing all conditions due and would retain the discretionary conditions that had been met. This has now been updated so that when AiB mark a discretionary condition as met, it is no longer visible in the task list. All discretionary conditions due in the past that have not been met will appear within the list along with all discretionary conditions due in the next month.

## 5. Variations

### 5.1 Partial Settlement status approved even when all creditors reject

All partial settlement variations were being set to 'Approved' at the end of the voting period/when last vote was cast regardless of the votes. This has now been changed so that if all creditors reject the partial settlement variation:

Vote Status	Actions
Reject	<a href="#">View</a>
Reject	<a href="#">View</a>
Reject	<a href="#">View</a>
Reject	<a href="#">View</a>
Reject	<a href="#">View</a>
Reject	<a href="#">View</a>


The variation status will change to 'Rejected':

Partial Settlement	Rejected
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If there is a single accepted vote, the variation status will show as 'Approved' as a payment is required to be taken by the Payments Distributor.

## 5.2 Freeze Variation Table

Prior to approval of a debt change variation, there is a debt comparison table to show what changes have been made to that variation. Going forward, the debt comparison table will remain within the variation after approval of the variation and will remain frozen with the remaining balances from the date of approval of the variation:

Debt Comparison					
Debt	Starting balance	Remaining amount	Starting balance after variation	Remaining amount after variation	Variation to starting balance
Creditor 1	£17,731.68	£14,951.26	£17,731.68	£14,951.26	£0.00
Creditor 2	£10,257.11	£8,648.70	£10,257.11	£8,648.70	£0.00
Creditor 3	£4,012.27	£3,383.07	£4,012.27	£3,383.07	£0.00
Creditor 4	£3,148.29	£2,654.61	£3,148.29	£2,654.61	£0.00
Creditor 5	£1,013.28	£854.43	£1,013.28	£854.43	£0.00
Creditor 6 	£467.00	£393.85	£0.00	£0.00	£-467.00
Creditor 7	£2,031.40	£1,712.86	£2,031.40	£1,712.86	£0.00
Total	£38,661.03	£32,598.78	£38,194.03	£32,204.93	£-467.00

This is visible to AiB users, Money Adviser users as well as the Payments Distributor users.

However, if there are multiple debt change variations processed on the same day with payments in between each, each debt comparison table will match the remaining debt values from before any payment was made.

## 5.3 Do not cancel DD message added at submit stage of crisis/payment break

Where AiB is PD and the debtor is paying by Direct Debit, a message appears within the submit page of a Crisis Break or Payment Break Application advising that the direct debit should not be cancelled:

By submitting this variation:

- I declare all information is accurate
- You do not need to cancel your direct debit. Once your payment break/crisis break is approved all future collections will be suspended until your payment break/crisis break ends and your DPP resumes.

Agree to Declaration?

 - Yes

This is visible for the money adviser, AiB and the debtor (payment break only for the debtor as they don't have the option to apply for a Crisis Break).

## 5.4 Payment Break Start Date

When applying for a payment break, the start date can be selected as the next day, however if the proposal waited the 21 day consultation period and then another short period whilst the application was considered at FR, the start date will have passed. This has been amended so that the start date of all payment breaks will be the date of approval of the payment break:

<b>Created By</b>	
<b>Created By - Organisation</b>	AiB
<b>Created On</b>	23-09-2020
<b>Last Updated By</b>	
<b>Last Submitted On</b>	21-09-2020
<b>Issued On</b>	21-09-2020
<b>Decision Made On</b>	23-09-2020

Type and Grounds

Criteria

Payment Break

Payment Break Length (Num of Instalments)

6

Payment Break Start Date

23-09-2020

Payment Break Frequency

Monthly

## 6. Searches

### 6.1 Hold Results until new search is complete or eDEN is closed

Previously, only the variation, revocation, conversations, proposals, reviews and appeals searches would retain the search filters and search results until the search was reset, a new search carried out or the user logged out.

All searches carried out through the Cases menu within eDEN now perform the same way. So, if a user enters details for the search to filter on, selects one of the results and then moves back to the search, all results will still be available without applying the filters again.

## 6.2 Search results show MA on case and when exported identify CMA

The case search, variation search and revocation search result exports now all contain the money adviser organisation name along with a column identifying whether the money adviser is a continuing money adviser or not.

The column shows as CMA True/False, so if the money advice organisation is registered as a continuing money adviser, this will show as True beside the case in the exported results.

## 6.3 Payments Distributor Case Search Changes

Previously when a full case search was carried out and the filter of the Payments Distributor name was added, the search results were filtered by the PD that was showing on the personal application, rather than the current PD which shows within the DPP.

This has now been amended so that, if there is only a draft DPP, the results will be filtered by the personal application, if the DPP is beyond the Draft status, the results will be filtered by the DPP details.

## 6.4 Case status added to the case search export

When carrying out a case search through the 'Search Cases' option in the Cases menu, the case status is now available within the search export, this was previously only available within the search results on screen:

Case Reference	Case Type	Application Status	Approval Date	Money Adviser	Created On	Case Status
2008/900001	Personal	Approved	22-Jan-08	Test Adviser	22-Jan-0	Revoked
2009/900002	Personal	Approved	22-Sep-08	Test Adviser	22-Sep-0	Live
2010/900003	Personal	Approved	18-Nov-08	Test Adviser	18-Nov-0	Completed
2011/900004	Personal	Withdrawn		Test Adviser	12-Jul-1	Draft
2012/900005	Personal	Rejected		Test Adviser	07-Apr-2	Draft
2013/900006	Personal	Draft		Test Adviser	17-Apr-2	Draft
2014/900007	Personal	RequiresFairAndReasonable		Test Adviser	02-Jul-2	Draft
2015/900008	Personal	Issued		Test Adviser	09-Jul-2	Draft
2016/900009	Personal	Submitted		Test Adviser	03-Aug-2	Draft