

Low-Income Home Energy Assistance Program (LIHEAP) Performance Measures are important because they help us understand how well we are targeting bill payment assistance to households with the highest energy costs in relation to income (as required in Section 2605 (b)(5) of the LIHEAP statute).

New LIHEAP Performance Measures require us to obtain information on clients' energy burden and the effect of LIHEAP benefits in restoring home energy service and preventing loss of home energy service. This document provides guidance specifically for data transfers of information needed for the LIHEAP Performance Data Form from LIHEAP subgrantees.

STEP 1 – Collect Necessary Data at Client Intake

We will ensure that the LIHEAP application collects all necessary data for the LIHEAP Performance Data Form. Program participants must have signed an Authorization Form that allows you to release data to us.

STEP 2 – Prepare a Data File with Client Information

Please furnish an electronic data file with the specified information for customers for the **reporting period**. The extract should furnish one record for each separate LIHEAP benefit paid to a client with the following information:

- 1) **Household Information.** Please provide the client name, social security number (if applicable), address, number of household members, and annual income.
- 2) **Vulnerability Status.** You will indicate whether the household contained an elderly member (60+), a disabled member, or a young child (<6).
- 3) **Benefit/Assistance Information.** Please report the LIHEAP benefit payment date, LIHEAP benefit type, LIHEAP benefit amount, and fuel type where the benefit was applied.
- 4) **Main Heating Fuel.** Please provide each client's main heating fuel type, main heating fuel vendor name, and main heating fuel vendor account number.
- 5) **Electric.** If electric is not the client's main heating fuel, please provide the client's electric vendor name and electric vendor account number.
- 6) **Home Energy Status.** You will report whether the client is disconnected or out of fuel. You will also report if the client is past due, has received a shut-off notice, or is nearly out of fuel.
- 7) **Equipment Repair/Replacement.** You will report whether the equipment repair/replacement assistance provided to the household restored home energy service or was necessary to prevent the loss of home energy service.

STEP 3 – Return Data File via CD or FTP

The data can be delivered in a password-protected file via e-mail, on a password-protected CD, or via a secure FTP site.

Frequently Asked Questions

Why are we collecting this data?

New LIHEAP Performance Measures require grantees to obtain information on clients' energy burden and the effect of LIHEAP benefits in restoring home energy service and preventing loss of home energy service.

What format are the data to be reported?

See the attached form for an example of how we would like the data formatted.

How do I know that this information request does not violate my customer's privacy?

All LIHEAP clients should have signed a client waiver to release their information to the state. Results will be reported to the federal government in the aggregate; information will not be associated with the housing units, account numbers, or the names of the clients in any way.

| Sub ID | HH Information | | | | | | | | Vulnerable in HH (Y/N) | | | Benefit/Assistance Information | | | | Main Heating Fuel Type | | | Electric (if not main heating fuel) | | Home Energy Status | | Equipment Repair/Replace | |
|----------------|-------------------|-------------|--------------------------|------------------|---------------|-------|---------|---------------|------------------------|----------|------------|--------------------------------|-------------------|----------------|---------------------------------------|------------------------|-----------------|-------------|-------------------------------------|-------------|------------------------------------|---|-----------------------------|--|
| CAA Name or ## | HH Name | SSN | Street Address 1 | Street Address 2 | City | ZIP | # in HH | Annual Income | Elderly (60+) | Disabled | Child (<6) | Payment Date | Benefit Type | Benefit Amount | Fuel type (where benefit was applied) | Main Heating Fuel Type | Vendor | Acct Number | Electric Vendor | Acct Number | Disconnected or Out of Fuel? (Y/N) | Past Due, Shut-off Notice, Nearly Out of Fuel (Y/N) | Restored Home Energy? (Y/N) | Necessary to prevent home energy loss? (Y/N) |
| CCAP | Charlotte Lucas | 444-44-4444 | 678 Collins Way | APT 2 | LucasLodge | 33333 | 2 | \$ 3,000 | N | N | N | 3/14/2015 | WX | N/A | Gas | Gas | P&P Gas | 78787 | Austen Electric | 3451 | N | N | N | Y |
| CCAP | Charlotte Lucas | 444-44-4444 | 678 Collins Way | APT 2 | LucasLodge | 33333 | 2 | \$ 3,000 | N | N | N | 11/14/2014 | Heating | \$ 200 | Gas | Gas | P&P Gas | 78787 | Austen Electric | 3451 | N | N | N | N |
| CCAP | Charlotte Lucas | 444-44-4444 | 678 Collins Way | APT 2 | LucasLodge | 33333 | 2 | \$ 3,000 | N | N | N | 1/9/2015 | Winter Crisis | \$ 400 | Gas | Gas | P&P Gas | 78787 | Austen Electric | 3451 | N | Y | N | N |
| CCAP | Tom Watson | 101-11-1010 | 367 Hamilton Drive | | LucasLodge | 33333 | 2 | \$ 2,000 | N | N | N | 11/23/2014 | Heating | \$ 200 | Electric | Electric | Austen Electric | 61616 | N/A | N/A | N | N | N | N |
| CCAP | William Collins | 131-31-1313 | 111 Alexander Drive | | Westerham | 0 | 3 | \$ 1,500 | Y | N | N | 1/3/2015 | Year Round Crisis | \$ 300 | Propane | Propane | Jane Propane | 14141 | Austen Electric | 41414 | Y | N | N | N |
| CCAP | William Collins | 131-31-1313 | 111 Alexander Drive | | Westerham | 0 | 3 | \$ 1,500 | Y | N | N | 5/6/2015 | Cooling | \$ 200 | Electric | Propane | Jane Propane | 14141 | Austen Electric | 41414 | N | N | N | N |
| CCAP | Carl Harris | 080-08-0808 | 999 Druid Drive | | Kympton | 6060 | 4 | \$ 5,000 | Y | Y | N | 4/25/2015 | Summer crisis | \$ 350 | Electric | Electric | Austen Electric | 21212 | N/A | N/A | N | Y | N | N |
| HCAA | Jeremy Edwards | 666-66-6666 | 88 Thomas Street | UNIT 1 | Hertfordshire | 77777 | 1 | \$ 1,000 | N | Y | N | 10/26/2014 | Heating | \$ 250 | Electric | Electric | Austen Electric | 89898 | N/A | N/A | N | N | N | N |
| HCAA | Jeremy Edwards | 666-66-6666 | 88 Thomas Street | UNIT 1 | Hertfordshire | 77777 | 1 | \$ 1,000 | N | Y | N | 2/5/2015 | Year Round Crisis | \$ 150 | Electric | Electric | Austen Electric | 89898 | N/A | N/A | Y | N | N | N |
| HCAA | Hannah Scott | 999-99-9999 | 222 Pecan Street | | LucasLodge | 33333 | 2 | \$ 6,000 | N | N | Y | 4/3/2015 | Cooling | \$ 250 | Gas | Gas | P&P Gas | 32323 | Austen Electric | 95959 | N | N | N | N |
| HCAA | George Wickham | 151-15-1515 | 363 Elm Street | | Lambton | 10101 | 1 | \$ 1,000 | N | Y | N | 12/10/2014 | Winter Crisis | \$ 200 | Oil | Oil | J.A. Oil | 15151 | Austen Electric | 51515 | N | Y | N | N |
| HCAA | George Wickham | 151-15-1515 | 363 Elm Street | | Lambton | 10101 | 1 | \$ 1,000 | N | Y | N | 2/10/2015 | Equipment | N/A | Oil | Oil | J.A. Oil | 15151 | Austen Electric | 51515 | N | N | N | Y |
| HCAA | Dexter Gordon | 020-02-0202 | 171 Blue Bossa Boulevard | FRNT | Westerham | 0 | 3 | \$ 2,000 | N | N | N | 1/5/2015 | Heating | \$ 150 | Gas | Gas | P&P Gas | 18181 | Austen Electric | 81818 | N | N | N | N |
| MCAA | Elizabeth Bennett | 111-11-1111 | 123 Main Street | | Hertfordshire | 77777 | 7 | \$ 2,000 | Y | N | N | 11/4/2014 | Heating | \$ 250 | Gas | Gas | P&P Gas | 12345 | Austen Electric | 45768 | N | N | N | N |
| MCAA | Elizabeth Bennett | 111-11-1111 | 123 Main Street | | Hertfordshire | 77777 | 7 | \$ 2,000 | Y | N | N | 2/10/2015 | Year Round Crisis | \$ 500 | Gas | Gas | P&P Gas | 12345 | Austen Electric | 45768 | N | Y | N | N |
| MCAA | Peter Smith | 555-55-5555 | 100 Second Street | | Meryton | 88888 | 3 | \$ 4,000 | N | N | Y | 12/8/2014 | Heating | \$ 300 | Electric | Electric | Austen Electric | 33445 | N/A | N/A | N | N | N | N |
| MCAA | Peter Smith | 555-55-5555 | 100 Second Street | | Meryton | 88888 | 3 | \$ 2,000 | N | N | Y | 1/8/2015 | Winter Crisis | \$ 200 | Electric | Electric | Austen Electric | 33445 | N/A | N/A | Y | N | N | N |
| MCAA | Kate Stewart | 040-04-0404 | 188 Fourth Street | | Rosings | 5050 | 1 | \$ 7,000 | N | N | N | 5/5/2015 | Cooling | \$ 150 | Electric | Electric | Austen Electric | 20202 | N/A | N/A | N | N | N | N |
| MCAA | Charles Parker | 161-16-1616 | 1776 Washington Street | | Delaware | 11111 | 2 | \$ 4,000 | N | N | N | 1/17/2015 | Year Round Crisis | \$ 350 | Electric | Propane | Jane Propane | 16161 | Austen Electric | 61616 | N | Y | N | N |
| MCAA | Charles Parker | 161-16-1616 | 1776 Washington Street | | Delaware | 11111 | 2 | \$ 4,000 | N | N | N | 11/17/2015 | Heating | \$ 350 | Propane | Propane | Jane Propane | 16161 | Austen Electric | 61616 | N | N | N | N |
| VCAP | Charles Bingley | 222-22-2222 | 456 Jane Stree | | Derbyshire | 99999 | 2 | \$ 5,000 | N | N | N | 1/8/2015 | Heating | \$ 150 | Electric | Electric | Austen Electric | 22334 | N/A | N/A | N | N | N | N |
| VCAP | Charles Bingley | 222-22-2222 | 456 Jane Street | | Derbyshire | 99999 | 2 | \$ 5,000 | N | N | N | 3/17/2015 | Equipment | N/A | Electric | Electric | Austen Electric | 22334 | N/A | N/A | N | N | Y | N |
| VCAP | James Sanchez | 888-88-8888 | 202 First Street | | Derbyshire | 99999 | 4 | \$ 7,000 | N | N | N | 1/14/2015 | WX | N/A | Gas | Gas | P&P Gas | 36363 | Austen Electric | 74747 | N | N | N | N |
| VCAP | Mike Yates | 010-01-0101 | 333 Third Street | 5th Floor | Hunsford | 12121 | 5 | \$ 5,500 | N | N | Y | 2/20/2015 | WX | N/A | Oil | Oil | J.A. Oil | 17171 | Austen Electric | 71717 | N | N | N | Y |
| VCAP | Mike Yates | 010-01-0101 | 333 Third Street | 5th Floor | Hunsford | 12121 | 5 | \$ 5,500 | N | N | Y | 4/23/2015 | Cooling | \$ 300 | Electric | Oil | J.A. Oil | 17171 | Austen Electric | 71717 | N | N | N | N |
| VCAP | Ella Fitzgerald | 060-06-0606 | 444 Blue Skies Drive | | Longbourn | 3030 | 1 | \$ 3,500 | N | N | N | 3/2/2015 | Heating | \$ 200 | Gas | Gas | P&P Gas | 19191 | Austen Electric | 91919 | N | N | N | N |
| YCAP | George Wickham | 333-33-3333 | 123 Militia Way | | Meryton | 88888 | 1 | \$ 1,000 | N | N | N | 12/15/2014 | Heating | \$ 200 | Electric | Gas | P&P Gas | 44556 | Austen Electric | 65432 | N | N | N | N |
| YCAP | Fitzwilliam Darcy | 777-77-7777 | 98 Pemberley Drive | | Hertfordshire | 77777 | 2 | \$ 10,000 | N | N | N | 1/10/2015 | Heating | \$ 400 | Electric | Gas | P&P Gas | 98765 | Austen Electric | 11110 | N | N | N | N |
| YCAP | Fitzwilliam Darcy | 777-77-7777 | 98 Pemberley Drive | | Hertfordshire | 77777 | 2 | \$ 10,000 | N | N | N | 2/17/2015 | Year Round Crisis | \$ 250 | Electric | Gas | P&P Gas | 98765 | Austen Electric | 11110 | Y | N | N | N |
| YCAP | Lauren Thomas | 121-11-1212 | 555 Jones Street | APT 95 | Meryton | 88888 | 1 | \$ 2,000 | Y | N | N | 3/2/2015 | Year Round Crisis | \$ 300 | Electric | Electric | Austen Electric | 37373 | N/A | N/A | Y | N | N | N |
| YCAP | Paul Peterson | 232-23-2323 | 77 Arizona Ave | | Rosings | 5050 | 2 | \$ 500 | N | Y | Y | 11/11/2014 | Winter Crisis | \$ 200 | Propane | Propane | Jane Propane | 24242 | Austen Electric | 42424 | N | Y | N | N |
| YCAP | Paul Peterson | 232-23-2323 | 77 Arizona Ave | | Rosings | 5050 | 2 | \$ 500 | N | Y | Y | 5/11/2015 | Equipment | N/A | Propane | Propane | Jane Propane | 24242 | Austen Electric | 42424 | N | N | N | Y |

* Highlighted row = case where income changes between receipt of first and second benefit.