

LIHEAP Performance Measures Data Collection Guide

Supplement: Criteria for Determining Service Restoration

To report when a LIHEAP benefit restored home energy service—grantees should be collecting information about Home Energy status at the time of client application. This includes whether or not:

- a. Household had service disconnected by natural gas or electric company
- b. Household is out of fuel oil/kerosene, propane, or other delivered fuel
- c. Household's heating or cooling equipment is inoperable. *[This includes situations where the equipment is operating at the time of an audit, but must be "red-tagged" as a health or safety risk].*

VALIDATING DATA

For grantees to report that a LIHEAP benefit restored service, ***they must have some assurance that the benefit was actually successful in restoring home heating or cooling service.*** Most states have one or more of the following policies in place to confirm restoration of service:

- **A copy of the most current bill is required to authorize benefit.** This confirms “disconnected” or “out of fuel” status, and indicates the amount necessary for restoration of home energy.
- **Interfacing with the vendor or utility is required to authorize benefit.** For example, to confirm current account status and amount due—many grantees will call the vendor, utilize a vendor data portal, or obtain up-to-date information from a vendor data exchange.
- **Data Exchanges are conducted with fuel vendors after delivery.** Some grantees use data exchanges to confirm fuel status at time of delivery. This helps the grantee accurately identify whether or not a fuel benefit restored home energy or prevented home energy loss.
- **Vendor contract explicitly requires that LIHEAP benefits will result in restoration of service.** For example, both Alaska and Pennsylvania have language that requires energy service to be restored for at least 30 days after a LIHEAP benefit is authorized.
- **Home Audits** are required to confirm that home energy equipment is inoperable or red tagged prior to authorizing work. **Final inspections** are conducted to confirm that equipment repair and replacement actually resulted in restoration of home energy.

SPECIAL CONSIDERATIONS

In some cases, collecting account status at the time of application may not be sufficient to report that the LIHEAP benefit successfully restored home heating or cooling service.

Example 1: Length of Time between Client Application and Benefit Authorization

There are some cases where a considerable amount of time may lapse between the time of LIHEAP application and benefit authorization. This means that the account status reported by the household at

the time of application may no longer be accurate. Under these circumstances, grantees may consider the following options:

- Confirm (update) account status with household prior to benefit authorization. This could include submission of updated utility or vendor bill.
- Contact Vendor to confirm account status prior to authorizing benefit. This may be done through a call with the vendor, a vendor data portal, or automated vendor data exchange.

If account status information is outdated and cannot be confirmed—the household should not be counted in Part VI of the Performance Data Form. For some states this may result in only reporting “crisis program” households (where in most cases, home energy status is verified prior to benefit or after fuel delivery).

Example 2: Benefits that Don't Result in Restoration

In rare cases, LIHEAP benefits may not be sufficient to restore home energy (even if the household is disconnected at the time of application or intake). In these cases, grantees may consider the following options:

- Many states supplement LIHEAP with other resources to restore home energy service. If LIHEAP is used in conjunction with other funding to restore home energy, it should still be counted on the Performance Data Form as restoring service.
- Some states may authorize benefits that are not sufficient to restore services (e.g., less than the amount due), but only do so after verifying the household has a "feasible plan" for restoring service. This may include proof of other obligated or pledged assistance. The grantee should only report that LIHEAP restored home energy in cases where they are confident energy was actually restored.

Some states authorize benefits that are not sufficient to restore home energy. In these cases, even if the household is disconnected or out of fuel at the time of application, the household should not be counted as a restoration on the Performance Data Form.

Example 3: Household Reported Equipment Status

Although many grantees ask households the status of their home energy equipment on the LIHEAP application, this data is generally not reliable enough to use for reporting cases where LIHEAP repaired or replaced inoperable equipment. For example:

- Inoperable equipment may be found during a home energy audit, even though the household reported their equipment as operating at the time of LIHEAP application.
- Households may report inoperable equipment on their LIHEAP application, however, an audit identifies user error (or other minor issues).
- Since equipment repair and replacement is conducted by contractors—some verification is needed that the equipment is operable after repair or replacement. This usually includes a final inspection report.

| Supplemental Resources | |
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| Performance Measures Data Collection Guide | Vendor Agreement Supplement |
| Criteria for Determining “At-Risk” Clients | Subgrantee Data Exchange Templates |
| Vendor Data Exchange Templates | Vendor Selection Supplement |
| Client Waiver Supplement | LIHEAP Performance Management Website |