The implementation of the Affordable Care Act (ACA) has increased the need for modernized IT systems to verify eligibility for Medicaid and the federal government will pay for 90 percent of the IT development costs for Medicaid eligibility systems. The ACA also provides an opportunity for human services programs to update their IT systems while benefiting from a time-limited exception to usual cost-allocation rules. Under this exception human services programs would not need to share in the IT system investment costs provided that the IT system investments benefit the state’s Medicaid program. This opportunity was originally scheduled to end in December 2015 however, the Centers for Medicare and Medicaid Services (CMS) recently notified states that they now have an additional three years, until December 2018, to utilize this funding to build integrated eligibility systems that incorporate eligibility for Medicaid with other social programs such as the Supplemental Nutrition Assistance Program (SNAP), the Temporary Assistance for Needy Families Program (TANF) and the Low-Income Home Energy Assistance Program (LIHEAP).

State LIHEAP programs could stand to benefit from developing coordinated data systems with health programs because of the overlap in clients, especially in states with increased Medicaid eligibility due to the ACA. Access to LIHEAP beneficiaries gives CMS a potential source of recruits for the Affordable Care Act (ACA) and CMS’s efforts to verify eligibility for ACA supports IT systems that may contribute to LIHEAP’s efforts to strengthen IT capacity. Many LIHEAP Offices are working to enhance data systems for performance management and for third-party verification to improve program integrity. All states have access to this funding, regardless of whether or not they will be expanding Medicaid under the ACA.

The use of this funding and cost allocation exception come with conditions in terms of the uses of funds and the timing of their receipt. When considering the feasibility of utilizing this funding to improve LIHEAP IT systems, states should consider the current level of coordination of eligibility determination and data systems between health and human services programs and weigh these consideration when deciding whether or not to take advantage of this opportunity.

Some LIHEAP programs are already working to take advantage of the potential funding for IT development through ACA, notably Maryland, Missouri, and North Carolina.

Here are two ways in which human services programs like LIHEAP might benefit from this opportunity:

- Joint procurement or development of systems that can serve both Medicaid and human services programs.
- Development of an interface between Medicaid and human services programs that could serve the following two purposes:
  - Increase the efficiency of Medicaid eligibility verification for current or former human services benefit recipients.
  - Fast-track Medicaid enrollment for newly eligible adults among human services benefit recipients.

Continued on page 7
WHo is on the performance measures work group?

The Performance Measures Implementation Work Group consists of state coordinators, staff from the Administration for Families and Children, and the Applied Public Policy Research Institute for Study and Evaluation (APPRISE) team. The group has been meeting since 2010. Members have helped define terminology, identify processes, develop a computerized data collection tool, and communicate to states throughout Office of Budget and Management (OMB) approval process. The group has now turned its focus to assisting states with specific steps they need to take to begin collecting and analyzing data. Here’s a closer look at the members, where their states are with implementation, and how to contact them.

Jennifer Lee  
State of Alabama  
Tools/Guidance Committee  
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Alabama was invited to join the work group in March 2013 to provide input and feedback from a state that administered both a heating and a cooling program. I felt honored when Willie Whitehead, the State LIHEAP Program Manager, asked if I would represent the State and serve on the work group.

Although performance measures reporting will not be required until FY 2016, the State of Alabama has taken steps over the past 18 months in developing our action plan to collect and report data for the current fiscal year. We felt it would be beneficial to go through the process this year and give ourselves time to “work out any kinks.”

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Susan Marshall  
State of Alaska  
Communications Committee  
Susan.Marshall@alaska.gov

Alaska began using a centralized web-based system called FACSPro in 2010 for the LIHEAP, CSBG and Weatherization programs which are administered through the Alabama Department of Economic and Community Affairs (ADECA). All of our sub-grantees, which include 21 community action agencies and one non-profit organization, utilize FACSPro for customer intake, awards and batching.

At the beginning of FY 2014, we updated our system to provide a way for intake staff to capture when a LIHEAP award prevented a home energy crisis or restored home energy service. Clients are required to bring the current utility bill or give their account number for their fuel supplier; therefore our sub-grantees can make the determination of prevention or restoration of services by reviewing the bill and/or contacting the vendor at the time of application.

Up to this point, our program had not collected annual energy cost or usage data. During the summer months of 2014, State LIHEAP staff tackled one of our biggest challenges by identifying our top vendors and meeting with them individually to discuss the proposed performance measures, client waiver language and potential vendor agreement revisions. The meetings were very successful, due largely in part to the strong relationships we and our sub-grantees have developed with the vendors over the years, and they agreed to supply the requested data. We intend to generate a client list at the end of the year for each of our top vendors and they will provide energy costs for the previous 12 months in an electronic format that can be uploaded to FACSPro.

I encourage you to see how much of the performance measure data you can currently collect to get a baseline of where you stand. And also to take advantage of the existing process guides available on the performance measurement website and visit it frequently for updates.

Susan began meeting with vendors two years ago to introduce the subject of performance measures, explain what we are trying to accomplish, and gather input from the vendors. She found vendors who preferred to automate the process and others who still keep track of sales manually. It was determined that Alaska would develop a vendor portal that would allow the automatic transfer of data with an option for vendors to sign in and manually input the information. Unfortunately, the state’s IT Governance Committee denied Heating Assistance’s request for a vendor portal, citing the age of their software. Alaska will generate an Excel spreadsheet to mail out to
vendors to collect usage data until LIHEAP is included in the new eligibility software system that will include multiple programs.

Susan is interested in talking to any other states that are currently going through the same process or who have already gone through this process so she can learn about things she should be aware of, for example, tracking a filing unit (individual person) versus a household.

Susan got involved with the work group because she knew Alaska had a lot of work to do and wanted to be part of shaping the measures instead of having them just handed to her. She feels her involvement on the work group has been beneficial to the overall group as well as Alaska.

Kathleen Cruz  
State of Arizona  
Tools/Guidance Committee  
KCruz@azdes.gov

Arizona is in the process of identifying what changes they need to make and how to proceed with developing a plan to report on the new performance measures. The biggest challenge for Arizona is it does not have a statewide data base system to collect the data. Kathleen is working with APPRISE and OCS to develop strategies to collect the LIHEAP Performance Measures data.

Kathleen joined the LIHEAP Performance Measures Work Group to learn how other states are preparing to collect the needed data. While Kathleen will be leaving us in February we wanted to make sure we acknowledged her work and efforts. Good luck Kathleen!

Shirley Mason  
State of Arkansas  
Communications Committee  
Shirley.Mason@dhs.arkansas.gov

Arkansas has begun to take steps to implement performance measures data collection. They have made revisions on their LIHEAP application, sub-grantee agreements, and vendor agreements; and have corresponded with their energy partners to provide information regarding the requirements for the new performance measures data. Arkansas’s IT unit has also modified the LIHEAP client data intake information to reflect changes made to the application for data collection.

The bigger challenge for Arkansas will be the collection of data from propane dealers around the state. Some of the smaller propane businesses may not have the capabilities to collect the required information electronically. To address this challenge, Arkansas has built indicators into the application process to capture the information so clients may self-declare their cost and usage of propane.

Some of the lessons Shirley has learned include create a plan, keep it simple, and work with your energy partners to solicit input; don’t hesitate to ask questions; and to utilize all available resources including the Performance Measures Work Group, other state coordinators, and the APPRISE team.

Shirley joined the PMIWG for the hands on experience offered and the ability to take advantage of the unlimited resources available in working directly with OCS, APPRISE and other states that have advanced in the data collection process. Shirley hopes to offer her experiences to her peers and other states who are in the beginning stages of their data collection efforts.

Lynell Westbrook  
State of Indiana  
Tools/Guidance Committee  
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Indiana is well on their way to full implementation of data collection for the new LIHEAP performance measures. Indiana has updated vendor agreements, they've trained their sub-grantees, met and developed working relationships with vendors, and have worked with consultants to upgrade their data systems.

Sub-grantees collect client information, such as addresses, account numbers, disconnect/low/out of fuel status and whether LIHEAP prevented disconnection or assisted with reconnection. Gas and electric vendors have begun compiling cost and usage data. Beginning in April 2015, these vendors will begin to report that information to the State office on a quarterly basis. Indiana's office has staff in place to aggregate and analyze the data. Their biggest challenge will be working with the deliverable fuel and wood vendors to develop a system to track and report annual usage information. Most of these vendors presently have no systematic way of tracking client usage and cost information.

When asked why Lynell joined the work group, she responded, "I've always been a driver! I truly enjoy looking at a challenge and dissecting it. I also feel that my expertise in LIHEAP management is a value."
Minnesota is well-positioned to collect and report the required data. Thanks to a significant investment in time and money nearly a decade ago, Minnesota has a relatively robust online data system. Our system is aging quickly, so additional investments will be required in the near term. These investments will both ensure the state’s continued capacity to smoothly operate its program and build additional capacity for data collection, reporting, and analysis.

The biggest challenge Minnesota faces is ensuring the consistency of data entered at the local level. Minnesota typically serves over 145,000 households per year at 31 service providers throughout the state. With the large number of households and different service providers, some inconsistency is expected. Minnesota plans to overcome this challenge through the implementation of hard controls in our data system and through training. The biggest lesson Minnesota has learned is it requires strategic investments and planning to build the capacity to collect and report the required data over time.

Mike is the program analyst for Minnesota who works with John Harvanko, the LIHEAP manager. Mike joined the work group because Minnesota wanted to ensure its compliance with the required measures and to provide any assistance it could to other grantees based on their experience.

Missouri provides a one-time Energy Assistance (EA) payment which is processed in a statewide computer system. We also provide crisis assistance for both winter and summer in a separate statewide LIHEAP contractor system. For the EA payment, we collect bill information and usage at the end of each program year. We can currently report on the benefit paid for EA by fuel type. We are in the process of adding the crisis households to a report so we may show the Total LIHEAP Benefit paid. Missouri income maintenance programs, including LIHEAP, will be added in the next few years to the Missouri Eligibility Determination Enrollment System (MEDES) which is being developed for the Affordable Care Act (ACA) requirements. MEDES will provide the opportunity to combine the EA and crisis components and include performance measurement data requirements.

The largest challenge for Missouri will be to ensure the inclusion of performance measurement data requirements in MEDES. MEDES will have competing program requests including Medicaid, Supplemental Nutrition Assistance Program (SNAP), Temporary Assistance for Families (TANF), and Child Care. To overcome this challenge, we have submitted business requirements that meet federal reporting mandates and have included the performance measurements.

Heather offers the following advice to her counterparts. Start with reviewing your program and systems to determine what information you currently are collecting. Next, review the LIHEAP Performance Measurement Report form and instructions and start identifying where you may have gaps or needs that should be addressed. Review guides, training materials, and call other states about where to get started. Sometimes it just starts with making a phone call or sending out an email. Start meeting with system staff to have high level discussions on business requirements including data needed to meet the performance measurements.

Heather was a member of the original Performance Measurement Work Group before assisting with the Program Integrity Work Group. She rejoined the Performance Measurement Work Group in April 2013 because she was interested in assisting Missouri meet the new requirements. Heather also values the relationships she's built with other state coordinators during this process.

Montana participated in the initial sample last year. They are able to provide electric and natural gas data for the majority of their participants and are currently working on getting data from their deliverable fuels vendors.

Montana is developing new vendor agreements and updating the current file the vendors use to send in consumption data. Vendors will have three options available to them to report the usage and consumption data including sending in an electronic file, sending the data in...
an Excel spreadsheet, or using a web portal or vendor system currently being designed and developed. By offering these three options, all vendors will be able to report their data.

The biggest challenge Montana is facing right now is getting actual data for deliverable fuels. They currently have a process where they estimate this data for households.

Montana’s advice to other states is to remember it takes time to design the systems and develop working relationships with vendors. The first step to collecting the data is to see what data you are already capturing. You may need to add fields to your current IT system and/or develop a system. There is a lot of information that can be gained from other states and what they are doing. Use all the tools that are available to you including the performance measurement website and T&TA.

Jenni got involved with the work group by first attending a meeting or two. She really believed in what the work group was doing and trying to accomplish. She wanted to help and hopes she has provided valuable insight and assistance to the group over the last couple of years.

Sheri Shepherd  
State of Montana  
Tools/Guidance Committee  
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Montana can report on the majority of the performance measures at this time, specifically related to natural gas and electricity. Montana has been collecting usage data, in dollars used, for several years and uses that data in their benefit amount determinations. The state is at the beginning stages of gathering fuel bill consumption data from all fuel vendors and utility companies.

The biggest challenge for Montana is the lack of available time, but we have overcome this challenge by making performance measures a priority.

Sheri got involved with the Performance Measures Implementation Work Group in July of 2014. She is thrilled to participate in the work group in order to add value to Montana’s Low Income Energy Assistance Program. She feels blessed to participate in a program (LIHEAP) that provides such important services to those in need.

Cari Crittenden  
State of Oklahoma  
Tools/Guidance Committee  
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Oklahoma is still in the beginning stages of the performance measures implementation process. The good news is Oklahoma can collect information from households on their application and have a reasonable number of vendors willing provide utility data. Their biggest challenge is their present ability to store and sort the data they receive from sub-grantees and vendors. Beyond the old household report data, they have no place in their current system to input or store additional information. Their next step is to develop a system that will allow them to store and report what they collect.

Cari's advice is, "Don’t be afraid to communicate your needs." There is likely someone else in the same position or that has just come through a similar situation. The PMIWG is here to listen and help as much as possible. It’s okay to say, “this is overwhelming” and ask for someone to help your state get started wherever you may be in the process.

Cari volunteered to participate on the work group because she knew Oklahoma would have a lot of work to do to meet the new, required performance measures goals. She knew they had a lot of changes that needed to be made to their system. She didn’t want to ask for changes based on what she wanted to see, but rather on what she knew was going to be required in the future. LIHEAP is often low on the list of IT priorities in Oklahoma and she wanted to make sure LIHEAP made the most efficient use of Oklahoma’s IT staff’s time and budget.

Jane Blank  
State of Wisconsin  
Data & Analysis Committee  
Jane.Blank@wisconsin.gov

Wisconsin has collected annual energy cost information for over 15 years. In 2013, Wisconsin worked closely with the top five regulated utilities to build an interactive “portal” into the Wisconsin Home Energy Assistance Program (WHEAP) centralized database/web application. This portal allows intake workers to obtain real time account information including the collection of annual consumption data. Approximately 85% of the WHEAP
population is served by the top five utilities. Annual cost information continues to be collected on the approximate 15% not included in this system automation. The portal increased program integrity and allowed for the collection of data for performance measures.

Wisconsin also has a rate payer program (Public Benefits) which improves the ability to collect and report more data for ‘Households with 12 months of Bill Data’.

In October 2014, Wisconsin deployed an enhanced version of the web application. In addition to expanding program integrity measures and performance measures data elements, the next phase of this project is adding the Wisconsin Weatherization program to this centralized database/web application.

Wisconsin's biggest challenge is collecting consumption data (units of fuel) from delivered fuel vendors. While the Wisconsin Vendor Agreement includes a provision that annual consumption information be collected from all energy providers, WHEAP has yet to implement a process for collecting consumption information from deliverable fuel vendors. Since Wisconsin is positioned to report all of the required Performance Measures data elements, plans to develop a consumption data collection process will not be immediately pursued.

One lesson Wisconsin learned was the importance of building strong, positive, working relationships with their vendors. When Wisconsin recognized the need to more specifically identify crisis activities as restorative/preventative, we met with the top five utilities to discuss options. In addition to enhancing our partnership with the utilities, we learned that there were significant variances in how each of the utilities defined “past due” and “disconnect notice”. After several meetings, we determined that this information would be best obtained from the applicant at the time of intake. FY 2015 is the first program year that Wisconsin is collecting this specific data element; we will continue to evaluate the validity of this data and will consider re-engaging with the utilities if warranted.

Jane joined, in 2010, the workgroup because of her expertise with data collection, report development and data/program analysis. She recognized the ability to help others learn from the experiences of a state that is advanced in the ability to collect and report performance measures. Her passion for learning from other states has been fed by being an active member of this workgroup.

YOUR FEED BACK IS IMPORTANT TO US
It takes a village to successfully launch a new product that is a guaranteed success. We value your hard work and your efforts. With that said, we need your feedback. Tell us about your state, where you are with the LIHEAP Performance Measures data collection, how we can be of help to you, what resources you need for the implementation of your performance measures, and what you would like to see posted in the Performance Measures Implementation Work Group Newsletter. Let us help you with your journey, you’ll be glad you did!

Got Questions About Performance Measures? Other States' Best Practices?
The Discussion Forum on the performance measurement website has answers.
https://liheappm.ncat.org/
Click on the “Discussion Forum” Tab

If you have trouble signing in, contact Sherry Vogel at sherryv@ncat.org

Leave Your Question
View Responses
Find Out What Others Are Saying
If your state is also working toward using this opportunity, please let Susan Marshall (Alaska) know and we will see if these states are interested in forming a mini-work group.

States interested in exploring this opportunity should begin with the state’s Welfare Program. APPRISE can provide information and advice.

Data & Analysis

The Data & Analysis Committee is dedicated to helping states analyze and use the data we are collecting to answer questions, prepare reports, and review how effective the various components are of each state’s program. They are working with the APPRISE Team to develop user friendly tools that create graphs and visuals you can download and use. Using the performance measurement website you will be able to compare various components of your program such as the amount of funding versus clients served for the different program components as well as compare yourself to other states or an entire region. These efforts will enable states to showcase the data in a professional manner in reports and publications.

Tools/Guidance

The Tools/Guidance Committee is working on an interactive tool that will walk states through the various steps needed to establish performance measures along with links to samples, instructions and helpful hints. Look for more information and the rollout of this tool within the next several months.

What Are the Performance Measures Committees Working On?

Communications

The Communications Committee will send out a newsletter every other month to keep states informed about the latest and greatest performance measures news, best practices, trainings, and success stories. The Committee will send out e-mails regarding important news you need to know in between the newsletters. This committee is also responsible for monitoring the Discussion Forum on the Performance measurement website and assisting with presentations at meetings and conferences.

The Power Of Performance Measures

Supporting LIHEAP’s Purpose:
Keeping homes at an appropriate temperature throughout the year so residents can stay healthy, safe, and in their homes.