

LIHEAP Performance Management Webinar: *Electric Baseload Expenditures Data Reliability Tool*

April 28, 2021 – 3:00 PM ET

Call-in Number (Audio): (562) 247-8422

Access Code: 981-634-683

Note:

Today's webinar will feature a hands-on activity. To participate in it, you will need to **log in** to the LIHEAP Performance Management Website using your username and password.

Recently, to improve website security, the log in process was updated to require two-factor authentication. All users who attempt to log in by entering their username and password will also need to enter a short code provided by a voice phone call.

To streamline your experience, please log in to the LIHEAP Performance Management Website in advance to set up two-factor authentication. Once you are logged in, please keep the Performance Management Website open in a separate tab of your browser:
<https://liheappm.acf.hhs.gov/user#login>

If you don't have an account yet, please create one by going to:
<https://liheappm.acf.hhs.gov/register>

LIHEAP Performance Management: *Electric Baseload Expenditures Data Reliability Tool*

LIHEAP Webinar hosted by the Office of Community Services (OCS), the Administration for Children and Families (ACF) presented by APPRISE under contract to OCS

April 28, 2021

Welcome: Sharnice Peters, OCS

Lorraine Portis (PMIWG, Mississippi)

Sheri Shepherd (PMIWG, Montana)

Casey Letran (PMIWG, Oklahoma)

Kinisha Floyd (PMIWG, Tennessee)

Jenni Sullivan (PMIWG, Montana)

Peter Edelman (OCS)

Mark Reichard (iData Technologies)

David Carroll, (APPRISE)

Connor Priest, (APPRISE)

Tom Hanes, (APPRISE)



ADMINISTRATION FOR
CHILDREN & FAMILIES

Welcome

Purpose of This Webinar

- To inform LIHEAP program coordinators about the new Data Reliability Tool for Electric Baseload Expenditures.
- To demonstrate the functionality of the Data Reliability Tool and to train attendees on its use.

Audience for This Webinar

- LIHEAP state grantees and their support staff who are responsible for collecting, reporting, and using LIHEAP Performance Measures Data. This includes:
 - ✓ *LIHEAP coordinators*
 - ✓ *LIHEAP program staff*
 - ✓ *LIHEAP information technology support*

PMIWG PM Data Reliability Team Overview

Members of the Performance Management Implementation Work Group (PMIWG) are working with the APPRISE team to develop the LIHEAP Data Reliability Tools.

Members of the PMIWG Data Reliability team include:

- **Lorraine Portis**, Mississippi Department of Human Services, (MS)
- **Casey Letran**, Oklahoma Department of Human Services, (OK)
- **Kinisha Floyd**, Tennessee Housing Development Agency, (TN)
- **Sheri Shepherd**, Department of Public Health and Human Services, (MT)
- **Jenni Sullivan**, IT Support for Department of Public Health & Human Services (MT)
- **Peter Edelman**, Division of Energy Assistance, Office of Community Services

The above team members developed the tool covered in this webinar

Webinar Overview

Webinar Agenda

- **Why Collect Electric Baseload Data?** – David Carroll, APPRISE
- **Understanding the Data Reliability Tools** – Sheri Shepherd, MT
- **Electric Baseload Expenditure Tool Navigation** – Connor Priest, APPRISE
- **Live Demonstration #1** – Overall Data Reliability Assessment – 2019 Data – Kinisha Floyd, TN
- **Live Demonstration #2** – Assessment #2B– Collecting Data – Jenni Sullivan, MT
- **Live Demonstration #3** - Assessment #3B – Processing Data – Casey Letran, OK
- **Next Steps** – Sheri Shepherd, MT
- **Note:** Slides available for download under “Handouts” in the GoToWebinar Sidebar.

Why Collect Electric Baseload Data?

Electric Baseload Data Reliability Tool: Purpose

“The term ‘home energy’ means a source of heating or cooling in residential dwellings.” - LIHEAP Statute, Section 2603 (6)

LIHEAP programs can be designed to assist households with home energy bills.

- Home energy costs include cooling as well as heating costs.
- Cooling costs are included in electric baseload costs for households that do not heat with electricity.

Electric Baseload Data Reliability Tool: Purpose

Region	Total Energy Expenditures	Percent Heating or Cooling	Percent Heating	Percent Cooling
All US	\$1,856	44%	29%	14%
Northeast	\$2,269	45%	37%	8%
Midwest	\$1,760	43%	34%	8%
South	\$1,917	45%	24%	20%
West	\$1,518	37%	23%	14%

Source: Residential Energy Consumption Survey

- Across the US, between one third and one half of household energy consumption goes towards heating and cooling.
- This means more than half of a household's energy expenditures go towards other things like lighting, appliances, cooking fuel, hot water, etc.

Electric Baseload Data Reliability Tool: Purpose

	Main Heating Fuel Type				
	All Households	Electric Heat	Natural Gas	Fuel Oil	Propane
Main Heating Bill	\$1,265	\$1,588	\$999	\$1,518	\$1,605
Electric Bill	\$669	\$0	\$724	\$760	\$898
Total Energy Bill	\$1,934	\$1,588	\$1,723	2,278	\$2,503
Home Energy Bill	\$870	\$715	\$775	\$1,025	\$1,126

Source: Massachusetts Performance Data Form, FY 2019

- For households that do **not** heat with electricity, the Home Energy Bill can be disproportionate to the main heating fuel bill.
- Collecting the main heating bill alone is **not** sufficient to accurately assess total household energy burden.

Electric Baseload Data Reliability Tool: Purpose

- **Heating Fuel Bill:** Using only the Main Heating bill, you would give high benefits to the electric main heat households.

Main Heating Fuel Bill	Electric	Natural Gas	Fuel Oil	Propane
	\$1,588	\$999	\$1,518	\$1,605

- **Home Energy Bill:** But, looking at home energy, you would give higher benefits to fuel oil and propane main heat households.

Home Energy Bill	Electric	Natural Gas	Fuel Oil	Propane
	\$715	\$775	\$1,025	\$1,126

- **Supplemental Heat:** The electric bills for Propane households are higher than those for natural gas and fuel oil main heat households.

Electric Bill	Electric	Natural Gas	Fuel Oil	Propane
	~	\$724	\$760	\$898

- **Conclusion:** Collecting a household's main heating fuel bill alone is insufficient to assess the home energy bill.

Electric Baseload Data Reliability Tool: Background

Conclusion: The only way to determine home energy costs is to collect a household's entire energy bill.

- ***Targeting*** – Determining home energy costs is needed to successfully target benefits to higher burden households.
- ***Data Requirements*** – Determining home energy costs requires reliable data on Electric Baseload costs in your state.

Background: *Understanding the Data Reliability Tools*

LIHEAP Data Reliability Tools: Background

Requirement: Grantees are required to collect and report LIHEAP Performance Measures data each year.

Purpose: Grantees are expected to use the Performance Measures data to assess the performance of their program.

Question: As Grantees start to use their Performance Measures data, they ask *“How do I know that my Performance Data are reliable enough to support making changes in my program design or policies?”*

LIHEAP Data Reliability Tools: Background

Framework: PMIWG grantees worked with Melissa Torgerson (Verve) to develop a comprehensive assessment framework that includes...

- ***Defining*** – Making sure that you are clear about the data that need to be collected.
- ***Collecting*** – Assessing whether you are collecting enough data to meet the requirements.
- ***Recording and Processing*** – Ensuring that your procedures are designed to maximize data quality.
- ***Checking*** – Using a set of checking procedures that furnish feedback on data quality and consistency.

LIHEAP Data Reliability Tools: Background

- For more information on the Assessment Framework, see the Data Reliability Webinar from 9/19/2019
 - Video: https://www.youtube.com/watch?v=Xqd7_hq6ssg
 - Slides: <https://liheappm.acf.hhs.gov/pm-webinars>
- The slides for THIS webinar are also available right now from the GoToWebinar “handouts” section.

LIHEAP Data Reliability Tools: Background

Tools: PMIWG grantees worked with APPRISE and iData Technologies to develop a set of tools that...

- ***Prioritize*** – Help you to prioritize your review and assessment of data reliability.
- ***Benchmarks*** – Furnish benchmarks that alert you to data reliability issues.
- ***Identification*** – Show you how to identify the source(s) of your data reliability problem(s).
- ***Action Plan*** – Help you to develop an action plan for improving the reliability of your data.

LIHEAP Data Reliability Tools: Development

Format:

- ***Web-Based Tool Format*** –The Data Reliability Assessments are interactive online tools that:
 - Automatically access data from the Data Warehouse
 - Guide the grantee through a review of their data and reliability practices
 - Notify the grantee when there is a potential issue with their data
 - Generate an action plan which is automatically saved directly to the Performance Management Website

LIHEAP Data Reliability Tools: Main Heating Expenditures

- ***Main Heating Expenditures Tool***– The first Data Reliability Tool developed by the PMIWG and APPRISE was the Main Expenditures Tool that was published in August of 2020.
- *You can access the Main Heating Expenditures Tool here:*
 - https://liheappm.acf.hhs.gov/datawarehouse/data_reliability/
- *The PMIWG held a training webinar for the Main Heating Expenditures Tool on 8/12/2020. You can view it here:*
 - <https://www.youtube.com/watch?v=JkJiRa-Nc4A>

Data Reliability Tools: *Navigation and “Before You Begin”*

Electric Baseload Data Reliability Tool: Navigation

The Data Reliability Tool for Electric Baseload Expenditures is available at:

[https://liheappm.acf.hhs.gov/datawarehouse/electric baseload](https://liheappm.acf.hhs.gov/datawarehouse/electric%20baseload)

Note: The Data Reliability Tools are designed for grantees and support staff and are not accessible to the general public.

Electric Baseload Data Reliability Tool: Navigation



The screenshot shows the homepage of the LIHEAP Performance Management Website. At the top left is the logo for the Administration for Children & Families, LIHEAP Performance Management. To the right is the LIHEAP Website Navigator logo and a 'My Profile' link. Below these is a search bar with a 'Submit' button. A red arrow points from the text 'Click Here' to the 'LOG IN' link in the dark blue navigation bar. The main content area features a large heading 'Welcome to the LIHEAP Performance Management Website' followed by a paragraph describing the site's resources. To the right is a circular diagram with 'LIHEAP' in the center, surrounded by ten categories: Data Systems, Business Processes, Performance Management, Program Integrity, Vendor Agreements, Grantee Training, Stakeholder and Vendor Relationships, Subgrantee & Stakeholder Training, Subgrantee Contracts & Agreements, and Data Systems. Below the diagram is the text 'The LIHEAP Virtual Library'. Further down is a section titled 'Access Reports to Congress and 1-Page Grantee Profiles' with a paragraph and a list of data types.

ADMINISTRATION FOR
CHILDREN & FAMILIES
LIHEAP Performance Management

LIHEAP
WEBSITE NAVIGATOR

My Profile

Search this Site:
Submit

HOME PUBLICATIONS ▾ DATA WAREHOUSE PERFORMANCE MEASURES GRANTEE RESOURCES IMPORTANT LINKS WHAT'S NEW? DASHBOARD HELP LOG IN

Welcome to the LIHEAP Performance Management Website

This federal website provides resources, tools, and a dynamic Data Warehouse to help local program administrators, policymakers, and the public access performance management information and performance measurement data for the Low Income Home Energy Assistance Program (LIHEAP).



The LIHEAP Virtual Library

Access Reports to Congress and 1-Page Grantee Profiles

The [Reports to Congress](#) page includes the most recent published annual LIHEAP Reports to Congress and 1-page Grantee Profiles that provide a snapshot of each Grantee's LIHEAP program using 2014 Report to Congress Data.

The Report to Congress provides detailed national and state-level information on LIHEAP each year. This includes:

- Fiscal Data
- Home Energy Data
- Household Data
- Program Implementation Data

Click Here

Electric Baseload Data Reliability Tool: Navigation

LIHEAP Performance Management .

This federal website provides resources, tools, and a dynamic Data Warehouse to help local program administrators, policymakers, and the public access performance management information and performance measurement data for the Low Income Home Energy Assistance Program (LIHEAP).

UNAUTHORIZED ACCESS TO THIS COMPUTER SYSTEM IS PROHIBITED BY LAW You are accessing a U.S. Government information system, which includes: (1) this computer, (2) this computer network, (3) all computers connected to this network, and (4) all devices and storage media attached to this network or to a computer on this network. This information system is provided for U.S. Government-authorized use only. Unauthorized or improper use of this system may result in disciplinary action, as well as civil and criminal penalties. By using this information system, you understand and consent to the following: → You have no reasonable expectation of privacy regarding any communication or data transiting or stored on this information system. At any time, and for any lawful Government purpose, the Government may monitor, intercept, and search and seize any communication or data transiting or stored on this information system. → Any communication or data transiting or stored on this information system may be disclosed or used for any lawful Government purpose. → All content on this website is intended to be accessible to people with disabilities and is periodically reviewed for compliance with Section 508 of the Rehabilitation Act. Should you encounter any issues with accessing content, please contact webmaster@ncat.org.

Welcome back!
Sign in to continue.

Username

Enter your LIHEAP Performance Management username.

Password

Enter the password that accompanies your username.

[Log In](#)

Forgot Password? [Reset Now](#)

Don't have an account? [Create account](#)

Electric Baseload Data Reliability Tool: Navigation

The screenshot displays the LIHEAP Website Navigator interface. At the top left, the text reads "ADMINISTRATION FOR CHILDREN & FAMILIES". To the right, the LIHEAP logo is accompanied by the text "LIHEAP WEBSITE NAVIGATOR" and a "My Profile" link. A search bar labeled "Search this Site:" is visible. A modal window titled "Verify your identity" is centered on the screen. It contains a green highlighted box with the text "Please enter the OTP prompted on phone call.", followed by the instruction "Enter the passcode:". Below this is another instruction, "Please enter the OTP received on phone call", and a text input field with the placeholder "Enter OTP". At the bottom right of the modal are two buttons: "Verify" and "Cancel". The background shows navigation links for "HOME" and "LOG IN".

Electric Baseload Data Reliability Tool: Navigation

liheappm.acf.hhs.gov

ADMINISTRATION FOR
CHILDREN & FAMILIES
LIHEAP Performance Management

LIHEAP WEBSITE NAVIGATOR

NEED HELP WITH BILLS?

Search this Site:
Submit

HOME PUBLICATIONS DATA WAREHOUSE PERFORMANCE MEASURES GRANTEE RESOURCES IMPORTANT LINKS WHAT'S NEW? DASHBOARD HELP PMIWG GRANTEE FORUM LOG OUT

Welcome to the LIHEAP Performance Management Website

This federal website provides resources, tools, and a dynamic Data Warehouse to help local program administrators, policymakers, and the public access performance management information and performance measurement data for the Low Income Home Energy Assistance Program (LIHEAP).

The LIHEAP Virtual Library

What's New in January 2021

- APPRISE will be conducting two training Webinars for the FY 2020 Performance Data Form:
 - January 5, 2021 — FY 2020 Performance Data Form — Overview and Reminders for Module 2 (Performance Measures).** This webinar will provide a brief refresher on the important reporting guidelines and requirements for Module 2, including key reminders for avoiding common reporting issues.
 - January 19, 2021 — LIHEAP Performance Data Form Webinar — Step-by-Step Overview of Module 2 (Performance Measures).** This webinar will furnish an in-depth review of each reporting item for Module 2 (Performance Measures) of the FY 2020 Performance Data Form and also highlight resources available to assist with completion of the report.

What's New in December 2020

Electric Baseload Data Reliability Tool: Navigation

The screenshot shows the website liheappm.acf.hhs.gov/performance-measures. The header includes the logo for the Administration for Children & Families, LIHEAP Performance Management, and a search bar. A dark blue navigation bar contains the following links: HOME, PUBLICATIONS, DATA WAREHOUSE, PERFORMANCE MEASURES, GRANTEE RESOURCES, IMPORTANT LINKS, WHAT'S NEW?, DASHBOARD, HELP, PMIWG, GRANTEE FORUM, and LOG OUT. The main content area features a dark blue banner for "LIHEAP Performance Measures" with links to "LIHEAP Glossary" and "Site Feedback". Below this are five menu items, each in a light gray box with a dropdown arrow: "Grantee Profiles — One-page snapshots of state LIHEAP Programs.", "What are LIHEAP Performance Measures? — Information on the four LIHEAP Performance Measures.", "State Snapshots and Executive Summaries — Resources to help interpret Performance Measures data.", "Accessing Performance Measures Data through the Data Warehouse — Guidance for using the Data Warehouse.", and "Data Reliability Assessment Tools." A red arrow points to the last item.

ADMINISTRATION FOR
CHILDREN & FAMILIES
LIHEAP Performance Management

LIHEAP WEBSITE NAVIGATOR

NEED HELP WITH BILLS?

Search this Site:
Submit

HOME PUBLICATIONS DATA WAREHOUSE PERFORMANCE MEASURES GRANTEE RESOURCES IMPORTANT LINKS WHAT'S NEW? DASHBOARD HELP PMIWG GRANTEE FORUM LOG OUT

LIHEAP Performance Measures [LIHEAP Glossary](#) [Site Feedback](#)

Grantee Profiles — One-page snapshots of state LIHEAP Programs. ▾

What are LIHEAP Performance Measures? — Information on the four LIHEAP Performance Measures.

State Snapshots and Executive Summaries — Resources to help interpret Performance Measures data. ▾

Accessing Performance Measures Data through the Data Warehouse — Guidance for using the Data Warehouse. ▾

Click Here → Data Reliability Assessment Tools. ▾

Electric Baseload Data Reliability Tool: Navigation

liheappm.acf.hhs.gov/performance-measures

ADMINISTRATION FOR
CHILDREN & FAMILIES
LIHEAP Performance Management

LIHEAP WEBSITE NAVIGATOR

NEED HELP WITH BILLS?

Search this Site:
Submit

HOME PUBLICATIONS ▾ DATA WAREHOUSE PERFORMANCE MEASURES GRANTEE RESOURCES IMPORTANT LINKS WHAT'S NEW? DASHBOARD HELP PMIWG GRANTEE FORUM LOG OUT

LIHEAP Performance Measures

[LIHEAP Glossary](#) [Site Feedback](#)

Grantee Profiles — One-page snapshots of state LIHEAP Programs. ▾

What are LIHEAP Performance Measures? — Information on the four LIHEAP Performance Measures.

State Snapshots and Executive Summaries — Resources to help interpret Performance Measures data. ▾

Accessing Performance Measures Data through the Data Warehouse — Guidance for using the Data Warehouse. ▾

Data Reliability Assessment Tools. ▾

- [Main Heating Expenditures](#) - Assessing the reliability of main heating fuel billing data for your LIHEAP-assisted households.
- [Electric Baseload Expenditures](#) - Assessing the reliability of electric baseload billing data for your LIHEAP-assisted households. Step-by-step guidance on using the Data Warehouse.

Then Click Here



Electric Baseload Data Reliability Tool: Navigation

LIHEAP Data Reliability Assessment Tool - Electric Baseload Expenditures

Overview

PURPOSE OF THIS TOOL:

This tool is designed to help you assess the reliability of your electric baseload expenditures data collected in Section V of the LIHEAP Performance Measures Form. To begin, click **Start New Assessment** below.

TOOL LAYOUT:

The **Data Reliability Assessment Tool for Electric Baseload Expenditures** consists of the Overall Reliability Assessment and four in-depth assessments (one for each step of the data reliability framework). This web application is designed to guide you through each assessment, helping you identify common data reliability issues and their potential causes.

The first step in the process is to complete the Overall Reliability Assessment, which is designed to conduct a preliminary screening of your data and alert you to where your data look reliable and where you might want to dig deeper into potential issues using one of the other assessments.

After completing the Overall Assessment, the tool will direct you to focus your attention on the in-depth assessments where data reliability issues are most likely to be present. When potential data issues are identified, the tool will prompt you to address plans to remedy those issues in the **Data Reliability Action Plan**. When you have finished working through the tool, you will be able to print your results along with an aggregated Action Plan.

Your progress will be saved as you work through each assessment. After completing the assessments, you can view or print a summary of your results and your aggregated Data Reliability Action Plan. To begin an assessment, click the Start New Assessment button. To view or edit a previous assessment, select it from the list below.

START A NEW ASSESSMENT:

[Start New Assessment](#)

← Click Here

VIEW/PRINT PREVIOUS ASSESSMENT RESULTS:

Date Created	Fiscal Year	Grantee	Assessment	Action
2021-3-31	2019	New Jersey	Overall	View Action Plan Edit Delete

Electric Baseload Data Reliability Tool: Navigation

LIHEAP Data Reliability Assessment Tool - Electric Baseload Expenditures

Start a New Assessment

CHOOSING AN ASSESSMENT:

This is the screen from which you can start a new assessment.

Before you begin an assessment, you will need to click the corresponding **Before You Begin** button for that assessment in the table below to download a PDF of the data items you will need. These PDFs can be given directly to your database programmers so that they can pull the data you will need to complete the assessment.

One you have all of the necessary data you can click on the **Start Assessment** button to begin working through the assessment.

Important Note: The Overall Reliability Assessment is designed to conduct a preliminary screening of your data and alert you to where your data look reliable and where you might want to dig deeper into potential issues using one of the assessments. Therefore, you should always complete the Overall Reliability Assessment first whenever you are beginning to use the tool for a program year that you have not analyzed before.

Select an Assessment:

Assessment #	Assessment Name	Action
Overall	Overall Reliability Assessment	Before You Begin Begin Assessment
1	Defining Data Requirements	Before You Begin Begin Assessment
2A	Data Dollection - Vendors	Before You Begin Begin Assessment
2B	Data Collection - Households	Before You Begin Begin Assessment
3A	Data Recording & Processing - Vendor Assignment	Before You Begin Begin Assessment
3B	Data Recording & Processing - Account Matching	Before You Begin Begin Assessment
4	Data Checking Routines	Before You Begin Begin Assessment

Back

Electric Baseload Data Reliability Tool: Navigation

Assessments: PMIWG grantees worked with APPRISE to develop a series of Assessments, each with a specific purpose. The previous page gave you access to each type of Assessment.

- **Overall Assessment** – Helps you complete a quick assessment of your data to prioritize what you should look at first.
- **Assessment 1** – Furnishes benchmarks to assess whether your values for electric baseload expenditures are in the expected range.
- **Assessments 2A & 2B** – Review possible issues with collecting expenditure data from a sufficient number of vendors and households.
- **Assessment 3A & 3B** – Review possible issues with maintaining and matching account information on clients.
- **Assessment 4** – Asks you questions to assess whether you have a comprehensive set of data checking routines in place.

Electric Baseload Data Reliability Tool: Navigation

Before You Begin: The Data Reliability Tool automates the assessments where possible. But you will have to input certain data and it is best to have that data ready *before you begin* the assessment.

Electric Baseload Data Reliability Tool: Navigation

LIHEAP Data Reliability Assessment Tool - Electric Baseload Expenditures

Start a New Assessment

CHOOSING AN ASSESSMENT:

This is the screen from which you can start a new assessment.

Before you begin an assessment, you will need to click the corresponding **Before You Begin** button for that assessment in the table below to download a PDF of the data items you will need. These PDFs can be given directly to your database programmers so that they can pull the data you will need to complete the assessment.

One you have all of the necessary data you can click on the **Start Assessment** button to begin working through the assessment.

Important Note: The Overall Reliability Assessment is designed to conduct a preliminary screening of your data and alert you to where your data look reliable and where you might want to dig deeper into potential issues using one of the assessments. Therefore, you should always complete the Overall Reliability Assessment first whenever you are beginning to use the tool for a program year that you have not analyzed before.

Select an Assessment:

Assessment #	Assessment Name	Action
Overall	Overall Reliability Assessment	Before You Begin Begin Assessment
1	Defining Data Requirements	Before You Begin Begin Assessment
2A	Data Dollection - Vendors	Before You Begin Begin Assessment
2B	Data Collection - Households	Before You Begin Begin Assessment
3A	Data Recording & Processing - Vendor Assignment	Before You Begin Begin Assessment
3B	Data Recording & Processing - Account Matching	Before You Begin Begin Assessment
4	Data Checking Routines	Before You Begin Begin Assessment

Click Here

Back

Electric Baseload Data Reliability Tool: Navigation

February 2021

Data Reliability Assessment Tool: Electric Baseload Expenditures

Overall Assessment of Data Reliability

The Overall Reliability Assessment includes screeners for each assessment to help you determine where it looks like your data are reliable and where you might want to dig deeper using one of the in-depth assessments. We recommend completing the Overall Assessment before moving on to the other assessments.

Here is what you will need:

Screener #1 – Are the average annual electric bills you reported for each fuel type close to the annual electric bills we would expect in your state?

1) Average Annual Electric Bill Among LIHEAP Households by Fuel Type:

- **Where:** If you are evaluating a fiscal year for which Performance Data have already been processed, then this information will be auto populated into the tool from the Data Warehouse. Otherwise, you will need to enter the data from *Section V, Part B, Line 5* of your Performance Data Form.
- **What:** The average annual electric bill for LIHEAP-assisted households by main heating fuel:
 - Natural Gas Primary Heat
 - Fuel Oil Primary Heat
 - Propane Primary Heat

Screener #2A – Do you have enough electric vendors supplying data?

1) Number of Electric Vendors Serving LIHEAP-Assisted Households by Vendor Type:

- **Where:** Request this information from your IT department.
- **What:** A count of the number of electric vendors that receive LIHEAP benefits on behalf of your LIHEAP-assisted households. If possible, sort the vendors into the following categories:
 - Investor-Owned Utilities (IOUs)
 - Public Municipal Utilities
 - Rural Electric Cooperatives
 - Unknown

2) Number of Vendors to Whom Your Office Sent a Data Request:

- **Where:** Request this information from your IT department.
- **What:** A count of the number of electric vendors from whom your office requested electric baseload expenditure data for LIHEAP-assisted households. If possible, sort the vendors into the following categories:
 - Investor-Owned Utilities (IOUs)
 - Public Municipal Utilities
 - Rural Electric Cooperatives
 - Unknown

1

February 2021

3) Number of Vendors Reporting Data for LIHEAP Households:

- **Where:** Request this information from your IT department.
- **What:** A count of the number of vendors that complied with your request and reported electric billing data back to you. If possible, sort the vendors into the following categories:
 - Investor-Owned Utilities (IOUs)
 - Public Municipal Utilities
 - Rural Electric Cooperatives
 - Unknown
- **Note:** For each utility type, the numbers entered here should be *less than or equal to* the corresponding number in data item #2 immediately above.

Screener #2B – Do you have data for enough LIHEAP Households?

1) Number of Households by Main Heating Fuel:

- **Where:** If you are evaluating a fiscal year for which Performance Measures Data have already been processed, then this information will be *auto populated* into the tool from the Data Warehouse, otherwise you will need to enter the data from *Section V, Part A* of your Performance Data Form.
- **What:** A count of the number of LIHEAP-assisted households by main heating fuel:
 - Electric Heat Households
 - Natural Gas Households
 - Fuel Oil Households
 - Propane Households

2) Number of Households with COMPLETE Electric Baseload Data Collected by Main Heating Fuel:

- **Where:** Request this information from your IT department or data staff.
- **What:** A count of the number households with each of the following main heating fuel types for whom you received 12 consecutive months of electric baseload billing data, *regardless* of whether or not you also received 12 consecutive months of billing data for their main heating fuel.
 - Electric Main Heat Households
 - Natural Gas Main Heat Households
 - Fuel Oil Main Heat Households
 - Propane Main Heat Households

Screener #3A – Do you have an electric vendor and account number on file for a large percentage of your assisted households?

1) Number of Households by Main Heating Fuel:

- **Where:** If you are evaluating a fiscal year for which Performance Measures Data have already been processed, then this information will be *auto populated* into the tool from the Data Warehouse, otherwise you will need to enter the data from *Section V, Part A* of your Performance Data Form.
- **What:** A count of the number of LIHEAP-assisted households by main heating fuel:
 - Electric Heat Households
 - Natural Gas Households

2

Electric Baseload Data Reliability Tool: Navigation

LIHEAP Performance Management x LIHEAP Reports x EBOA.pdf

pmwebdev.ncat.org/data_warehouse/doc/EBOA.pdf

EBOA.pdf

1 / 4 100%

February 2021

Data Reliability Assessment Tool: Electric Baseload Expenditures

Overall Assessment of Data Reliability

The Overall Reliability Assessment includes screeners for each assessment to help you determine where it looks like your data are reliable and where you might want to dig deeper using one of the in-depth assessments. We recommend completing the Overall Assessment before moving on to the other assessments.

Here is what you will need:

Screener #1 – Are the average annual electric bills you reported for each fuel type close to the annual electric bills we would expect in your state?

1) Average Annual Electric Bill Among LIHEAP Households by Fuel Type:

- **Where:** If you are evaluating a fiscal year for which Performance Data have already been processed, then this information will be auto populated into the tool from the Data Warehouse. Otherwise, you will need to enter the data from *Section V, Part B, Line 5* of your Performance Data Form.
- **What:** The average annual electric bill for LIHEAP-assisted households by main heating fuel:
 - Natural Gas Primary Heat
 - Fuel Oil Primary Heat
 - Propane Primary Heat

Screener #2A – Do you have enough electric vendors supplying data?

1) Number of Electric Vendors Serving LIHEAP-Assisted Households by Vendor Type:

- **Where:** Request this information from your IT department.
- **What:** A count of the number of electric vendors that receive LIHEAP benefits on behalf of your LIHEAP-assisted households. If possible, sort the vendors into the following categories:
 - Investor-Owned Utilities (IOUs)
 - Public Municipal Utilities
 - Rural Electric Cooperatives
 - Unknown

2) Number of Vendors to Whom Your Office Sent a Data Request.

- **Where:** Request this information from your IT department.
- **What:** A count of the number of electric vendors from whom your office requested electric baseload expenditure data for LIHEAP-assisted households. If possible, sort the vendors into the following categories:

Click to Return to Assessment Selection

Click to Download

Click to Print

Electric Baseload Data Reliability Tool: Navigation

LIHEAP Data Reliability Assessment Tool - Electric Baseload Expenditures

Start a New Assessment

CHOOSING AN ASSESSMENT:

This is the screen from which you can start a new assessment.

Before you begin an assessment, you will need to click the corresponding **Before You Begin** button for that assessment in the table below to download a PDF of the data items you will need. These PDFs can be given directly to your database programmers so that they can pull the data you will need to complete the assessment.

One you have all of the necessary data you can click on the **Start Assessment** button to begin working through the assessment.

Important Note: The Overall Reliability Assessment is designed to conduct a preliminary screening of your data and alert you to where your data look reliable and where you might want to dig deeper into potential issues using one of the assessments. Therefore, you should always complete the Overall Reliability Assessment first whenever you are beginning to use the tool for a program year that you have not analyzed before.

Select an Assessment:

Assessment #	Assessment Name	Action
Overall	Overall Reliability Assessment	Before You Begin Begin Assessment
1	Defining Data Requirements	Before You Begin Begin Assessment
2A	Data Dollection - Vendors	Before You Begin Begin Assessment
2B	Data Collection - Households	Before You Begin Begin Assessment
3A	Data Recording & Processing - Vendor Assignment	Before You Begin Begin Assessment
3B	Data Recording & Processing - Account Matching	Before You Begin Begin Assessment
4	Data Checking Routines	Before You Begin Begin Assessment

← Click Here

Back

Electric Baseload Data Reliability Tool: Navigation

LIHEAP Data Reliability Assessment Tool - Electric Baseload Expenditures

Select State and Year

Overall Reliability Assessment:

INSTRUCTIONS FOR THE OVERALL ASSESSMENT:

The Overall Reliability Assessment is the starting place for using this tool. It includes the primary assessment checks for each step of the data reliability framework. For each of these primary data reliability assessment checks, you will be asked to enter specific information from your most recent performance measures data. Once you enter the requested information, this tool will assess the information and will alert you when a potential data reliability issue may be present by instructing you to proceed to one of the full assessments for further investigation.

To begin, select the year you would like to assess below. If you select a past year for which you submitted a PM Data Form, certain fields in this tool may auto-populate from the LIHEAP Data Warehouse. If you would like to conduct a reliability check on your FY 2019 data, which is currently being reported and processed, you will be given the opportunity to manually fill in the fields using your current FY 2019 PM Data Form.

Choose your state and year

Select your state: ▼

Select your year: ▼

Previous

Next

Electric Baseload Data Reliability Tool: Navigation

LIHEAP Data Reliability Assessment Tool - Electric Baseload Expenditures

Overall Reliability Assessment New Jersey, 2019

Assessment 1

Assessment 1 checks your low-income average electric expenditures against reasonable estimates of what low-income households are spending on baseload electric in your state using data from the American Community Survey (ACS).

If the PM data for the year you are trying to evaluate is available in the LIHEAP Data Warehouse, then it has been auto populated in the appropriate column below. If you are trying to evaluate a year for which data has not yet been added to the Data Warehouse, you will need to manually enter the **calculated average expenditures** for each fuel type, which can be found in "Section V, Part B, Line 5 of your Performance Data Form.

Main Heating Fuel	Average Annual Electric Bill from Performance Measures	Estimated Annual Electric Bill Based on ACS
Natural Gas	<input type="text" value="856"/>	\$1,200
Fuel Oil	<input type="text" value="1515"/>	\$1,295
Propane	<input type="text" value="1469"/>	\$1,295

- ◆ Auto-populated from the LIHEAP Data Warehouse or provided from your LIHEAP Performance Data Form.
- ◆ Auto-populated from an outside data source, such as the SEDS.
- ◆ Information that you will need to provide from your own records.
- ◆ No issue was found in the data entered for the corresponding fuel type.
- ◆ Issues were found in the data entered for the corresponding fuel type.

[Previous](#) [Next](#) [View Action Plan](#)
[Back to start](#)

Use these to navigate within the assessment

Use this button to jump to your action plan for assessments that have already been completed.

Use this button to save your work and return to the Data Reliability Tool Landing Page

Electric Baseload Data Reliability Tool: Navigation

LIHEAP Data Reliability Assessment Tool - Electric Baseload Expenditures

Overview

PURPOSE OF THIS TOOL:

This tool is designed to help you assess the reliability of your electric baseload expenditures data collected in Section V of the LIHEAP Performance Measures Form. To begin, click **Start New Assessment** below.

TOOL LAYOUT:

The **Data Reliability Assessment Tool for Electric Baseload Expenditures** consists of the Overall Reliability Assessment and four in-depth assessments (one for each step of the data reliability framework). This web application is designed to guide you through each assessment, helping you identify common data reliability issues and their potential causes.

The first step in the process is to complete the Overall Reliability Assessment, which is designed to conduct a preliminary screening of your data and alert you to where your data look reliable and where you might want to dig deeper into potential issues using one of the other assessments.

After completing the Overall Assessment, the tool will direct you to focus your attention on the in-depth assessments where data reliability issues are most likely to be present. When potential data issues are identified, the tool will prompt you to address plans to remedy those issues in the **Data Reliability Action Plan**. When you have finished working through the tool, you will be able to print your results along with an aggregated Action Plan.

Your progress will be saved as you work through each assessment. After completing the assessments, you can view or print a summary of your results and your aggregated Data Reliability Action Plan. To begin an assessment, click the Start New Assessment button. To view or edit a previous assessment, select it from the list below.

START A NEW ASSESSMENT:

[Start New Assessment](#)

VIEW/PRINT PREVIOUS ASSESSMENT RESULTS:

Date Created	Fiscal Year	Grantee	Assessment	Action
2021-3-31	2019	New Jersey	Overall	View Action Plan Edit Delete

← **Saved Assessment**

Electric Baseload Data Reliability Tool: Navigation

Hands-On Activity #1

Navigate to the *Before You Begin* page for the *Overall Reliability Assessment* and print or download the document.

Access the Data Reliability Assessment Tool:

https://liheappm.acf.hhs.gov/data_warehouse/index.php?report=datareliability_react#

Note: If you have problems getting the document to load, send us a comment with your name so that we can contact you for technical assistance.

Hands-On Activity #1—Audience Poll

QUICKPOLL

Were you able to successfully open or download the document?

Please Select One:

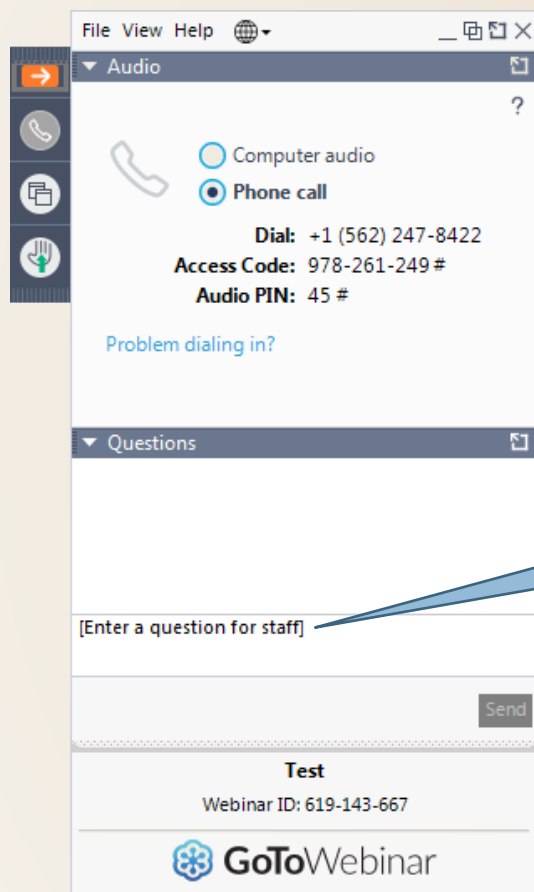
- **Yes!**
- **No, I couldn't figure it out.**
- **No, my browser didn't work / the tool didn't load.**
- **No, I had trouble with PMW log-in.**

Submit



Questions?

Q&A: GoToWebinar Question Box



Enter text here to ask a question.

If the sidebar is minimized, it will look like this:

Click this button to expand sidebar.

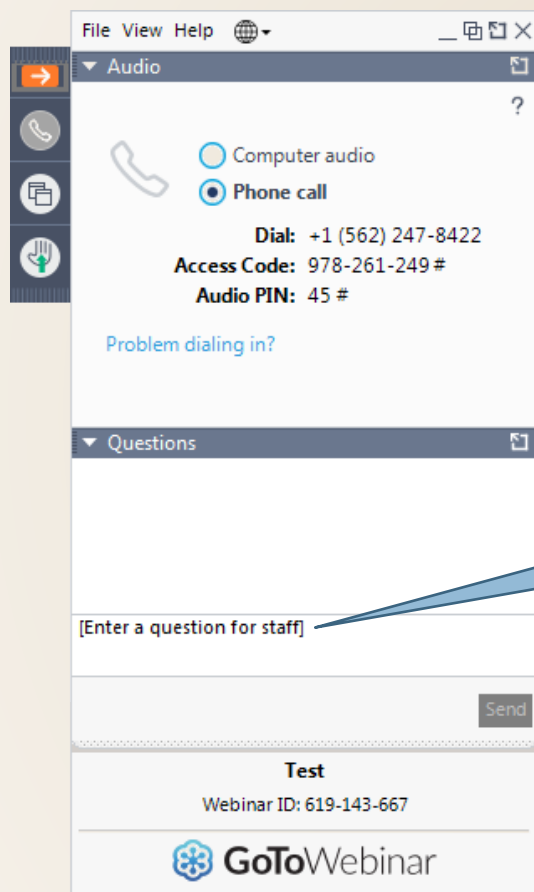


Data Reliability Tools

Demonstration of Overall Reliability Assessment for Tennessee

Questions?

Q&A: GoToWebinar Question Box



Enter text here to ask a question.

If the sidebar is minimized, it will look like this:

Click this button to expand sidebar.



Data Reliability Tools

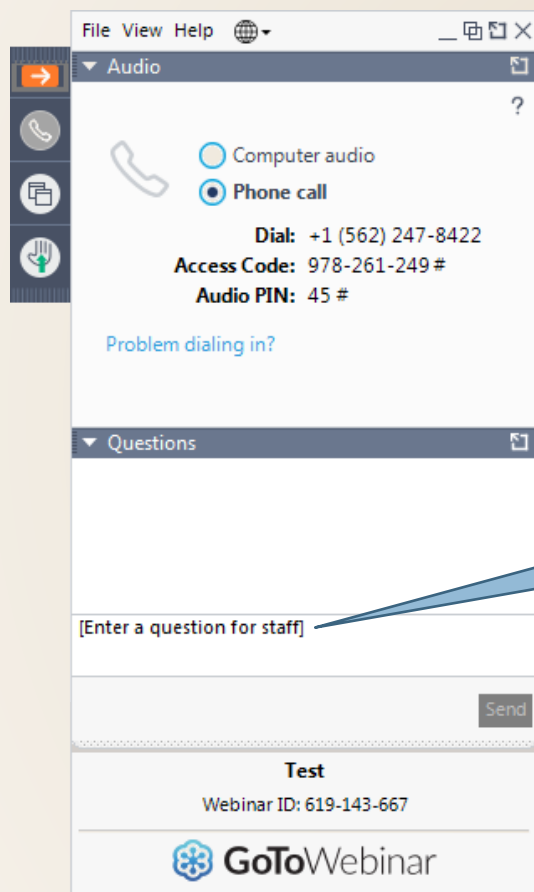
Demonstration of Assessment #2B for Montana

Data Reliability Tools

Demonstration of Assessment #3B for Oklahoma

Questions?

Q&A: GoToWebinar Question Box



Enter text here to ask a question.

If the sidebar is minimized, it will look like this:

Click this button to expand sidebar.



Data Reliability Tools *Next Steps*

Electric Baseload Data Reliability Tool: Next Steps

Using the modules: APPRISE will work with PMIWG members to continuously improve the tools based on user experience and feedback...

- **Main Heating Tool** – https://liheappm.acf.hhs.gov/datawarehouse/data_reliability/
- **Electric Baseload Tool** – https://liheappm.acf.hhs.gov/datawarehouse/electric_baseload

If you have comments or suggestions after using the tool, please send all feedback to connor-priest@appriseinc.org.

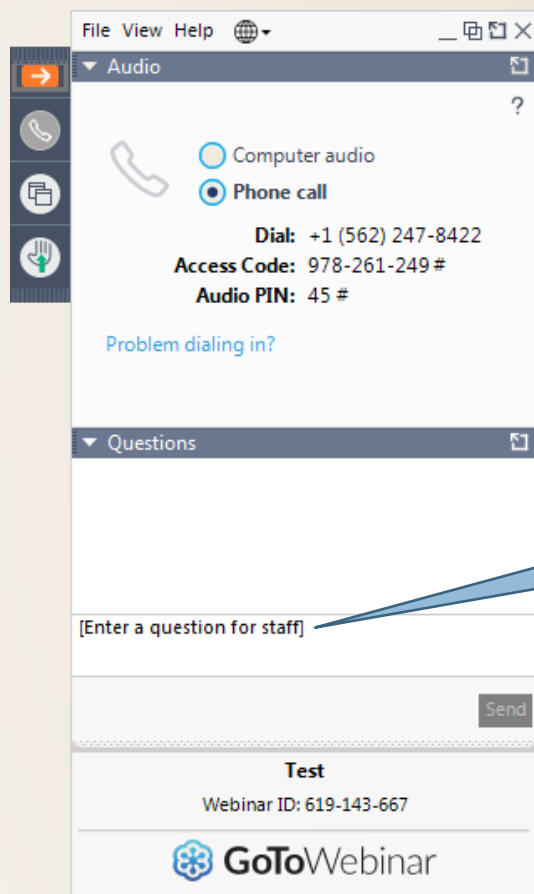
Electric Baseload Data Reliability Tool: Next Steps

Future Modules: the PMIWG Data Reliability Team plans to work with APPRISE to develop additional modules for other important data elements...

- ***Household Income*** – A tool to examine the reliability of the income data used to develop the Household Report and Performance Data Form.
- ***Household Benefits*** – A tool to examine the reliability of the household benefit data used to develop the Performance Data Form.
- ***Main Heating Fuel Type*** – A tool designed to help grantees explore and work on challenges with defining the main heating fuel for all clients.

Questions

Q&A: GoToWebinar Question Box



Enter text here to ask a question.

If the sidebar is minimized, it will look like this:

Click this button to expand sidebar.



Data Reliability Tool —Audience Poll

QUICKPOLL

Do you plan to use the Electric Baseload Expenditures Data Reliability Tool to assess your own data?

Please Select One:

- **Absolutely**
- **Probably**
- **Probably Not**
- **No, I don't need it**

Submit



Questions & Answers

If we do not respond to your question during the webinar, we will follow-up via e-mail.

If you have additional questions, please e-mail us:

- Connor Priest, connor-priest@appraiseinc.org
- Thomas Hanes, tom-hanes@appraiseinc.org
- David Carroll, david-carroll@appraiseinc.org
- Mark Reichard, mreichard@idatatechnologies.com
- Office of Community Services, Division of Energy Assistance - [Federal Staff Contact List](#)

Thank you for attending the webinar!