

OPERATIONS MEMORANDUM #16-10-01
LIHEAP

DATE: October 20, 2016

SUBJECT: LIHEAP Season 2016/2017 Supervisor Review Targets and
CAO Supervisor Reviews

TO: Executive Directors

FROM: Inez Titus
Director
Bureau of Operations

PURPOSE

To announce the targets for the 2016-17 LIHEAP Supervisor Reviews and the minimum number of LIHEAP Supervisor Reviews to be completed for each CAO.

BACKGROUND/DISCUSSION**Case Review Targets**

The targeting tool to select cases to review for the 2016-17 LIHEAP season will be available on the BPE Website under the LIHEAP Review tab beginning in November 2016. Supervisors must use the targeting tool to select cases when completing LIHEAP reviews. Please refer to D-4016 for instructions on how to use the targeting tool database.

The LIHEAP Targets are:

- LIHEAP Cash Grant of \$700 or More
- No Social Security Number (SSN) Entered
- Zero Income Used in LIHEAP Cash Application
- Duplicate Members
- SSN with a Date of Death in CIS
- Direct Pay Applications
- Previously Rejected Applications Now Approved
- Crisis Application Within 48 Hours of Cash Application
- Crisis Benefit and Cash Grant Greater than \$500 Approved Same Day

Also available at this location are all approved and rejected Cash and Crisis LIHEAP applications. The targeting tool database, including instructions on how to download, and instructions on how to run reports are available at:

<http://mydhs/oim/bpe/liheapreview/index.htm>.

Rushmore Case Review System

All LIHEAP Supervisor reviews must be completed in the Rushmore Case Review System. This system provides the ability to run reports that can assist in identifying trends. The “Causal Factor Summary” report is particularly helpful to CAO staff in analyzing results and error trends identified by the LIHEAP Supervisor Reviews. If help is needed with the Rushmore Case Review System, please contact Mary Stoop at mstoop@pa.gov.

LIHEAP Supervisor Review Requirements for 2016-2017

The [attached document](#) details the required number of supervisor reviews by CAO to be performed during the 2016-2017 LIHEAP season. The number of required reviews for each CAO is based in part on a CAO's percentage of applications received statewide during the 2015-2016 LIHEAP season. However, there is a minimum requirement of 40 reviews per CAO. The 2016/2017 Supervisor Requirements will be included on the BPE Website under the LIHEAP Review tab.

Please note: All CAOs have an assigned number of cases to review. Area 7 does not have an assigned number of cases to review. It will be the responsibility of the CAO to work with the SWPC/RPC to ensure that review compliance is met, especially if an SWPC/RPC processes some of a CAO's applications.

Recommended Guidelines

It is recommended that 60% of the CAO requirement be completed prior to 01/31/2017 and that at least 15% of the files reviewed be rejected files. The rejected files should include crisis files and crisis scenarios where the cash and crisis benefits were processed simultaneously.

NEXT STEPS

1. Please share with LIHEAP Coordinators and Supervisors responsible to complete LIHEAP reviews.
2. If help is needed with the Rushmore Case Review System, please contact Mary Stoop at mstoop@pa.gov.
3. Implement upon receipt.
4. Questions may be referred to Jenny Gomez (jegomez@pa.gov) or Mary Stoop (mstoop@pa.gov) via e-mail.

[Attachment](#)