

**DATE: August 26, 2024 OPERATIONS MEMORANDUM #24-08-01**

**SUBJECT:** 2024-2025 Low-Income Home Energy Assistance Program (LIHEAP) Policy, Procedures, and Form Changes

**TO:** Executive Directors LIHEAP Coordinators

**FROM:** Robert Hixson Director

Bureau of Operations

**PURPOSE**

To provide County Assistance Offices (CAOs) with LIHEAP policy, procedures, and form changes for the 2024-2025 program year.

**BACKGROUND**

As in previous years and prior to the start of LIHEAP, staff are provided with an Operations Memorandum (Ops Memo) that provides policy, guidance, procedures, and form changes that concern LIHEAP for the upcoming season.

Below is a timeline for this year’s LIHEAP:

* Week of August 26, 2024: Phase I mailing of bar-coded applications and the Commonwealth of Pennsylvania Access to Social Services (COMPASS) postcards to households who received LIHEAP during the previous program year. Pre-season COMPASS and paper applications will be accepted, and the Electronic Client Information System (eCIS) will be open for processing.
* Week of September 9, 2024: Phase II mailing of bar-coded applications and COMPASS postcards to households who received LIHEAP during the previous program year.
* Week of September 30, 2024: Phase III mailing of bar-coded applications and COMPASS postcards to households who received LIHEAP during the previous program year.

Department of Human Services

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* Week of October 15, 2024: Paper applications shipped to CAOs, vendors, and other organizations.
* November 4, 2024 – April 4, 2025: LIHEAP Cash & Crisis components open to all Pennsylvania residents.

Pre-season mailings are divided into three equal phases. Households are included in each phase depending on their approved program request date from the previous program year. For example, Phase I sends pre-season applications to the households that applied earliest last season.

Instead of receiving a bar-coded application, certain households will receive a postcard in the mail that enables them to apply for LIHEAP on COMPASS or the myCOMPASS PA mobile application. Households that receive a postcard will have a unique COMPASS registration number that, along with the Social Security Number of the payment name, will let them apply on COMPASS or myCOMPASS PA beginning August 26, 2024. The registration number can only be used to submit one application. The following groups will receive the COMPASS postcard instead of the bar-coded application:

* Households that have applied previously for any benefit through COMPASS or that have a myCOMPASS account and received LIHEAP during the previous program year.
* All households in the following counties that received LIHEAP during the previous program year:

|  |  |  |
| --- | --- | --- |
| Bradford | Lancaster | Tioga |
| Columbia | Pike | Washington |
| Cumberland | Susquehanna | Wayne |

Households who reside in one of the above-listed counties and do not wish to apply for LIHEAP on COMPASS can receive a paper application at any time. A paper application can be obtained from either the LIHEAP Helpline at 1-866-857-7095 or their CAO. The household’s bar-code number must be written on the application when it is provided to the applicant. This bar-code number, found on the mailing lists in DocuShare, will be used to register the completed application when it is received.

CAOs in these counties will be supplied with paper applications during the week of August 26, 2024, but staff should encourage applicants who come to the CAO to complete the application on the COMPASS mobile enabled website or COMPASS mobile app. A household’s COMPASS registration number can also be found on the mailing lists. For all other households in the state who receive a postcard, if they wish to have a paper application instead, they must wait until November 4, 2024, to apply.

Clients are instructed on the postcard to contact the LIHEAP Helpline if they have any questions completing the application. The LIHEAP Helpline will have access to the

mailing lists on DocuShare for both the postcards and bar-coded applications if the client misplaces the postcard or application and does not have their “COMPASS Registration Number”.

Households that receive bar-coded applications will also have a “COMPASS Registration Number” printed in the red box below the name and address. This allows them to apply on COMPASS or myCOMPASS PA if they choose.

**DISCUSSION**

LIHEAP has two main components: Cash and Crisis. The following is the specific information regarding this LIHEAP season:

1. **Parameters**

**Income Guidelines**

|  |
| --- |
| The income eligibility limit is set at 150 percent of the Federal Poverty Income Guidelines. |
| Household Size | Limit |
| 1 person | $22,590 |
| 2 persons | $30,660 |
| 3 persons | $38,730 |
| 4 persons | $46,800 |
| 5 persons | $54,870 |
| 6 persons | $62,940 |
| 7 persons | $71,010 |
| 8 persons | $79,080 |
| Each additional person | $ 8,070 |

**Minimum Cash Benefit Amount**

The benefit tables were revised to reflect the updated Cash component benefit amounts and income eligibility limits. The minimum Cash benefit is set at $200.

**Maximum Cash Benefit Amount**

The maximum Cash benefit amount is set at $1,000.

**Minimum Crisis Benefit Amount**

The minimum Crisis benefit is set at $25. Households who require less than $25 to resolve their home-heating emergency will not be eligible to receive a Crisis grant.

**Crisis Benefit Amount**

The maximum Crisis benefit amount is $1,000.

**Policy Clarifications and Alignments**

LIHEAP Handbook 604.1 has been updated to clarify if an application is unsigned but contains the name and address of the applicant, it must be accepted and held pending the return of the certification page. Additionally, the CAO must not accept a paper HSEA 1 that is for the incorrect program year as it is not considered a valid application and should not be entered into eCIS.

LIHEAP Handbook 604.14 has been updated to clarify that e-signatures on COMPASS applications submitted by registered COMPASS Community Partners are acceptable signatures.

LIHEAP Handbook 604.2 has been updated to clarify applications received via email, fax, and uploaded as a document to a COMPASS account must be date-stamped.

LIHEAP Handbook 604.3 has been updated to clarify a request for Crisis benefits must come from the applicant. A vendor cannot request Crisis benefits for an applicant unless it is through the Utility File Transfer process. The CAO must not process a Crisis request on behalf of an applicant if they become aware of a crisis through a vendor without first speaking to the applicant and obtaining their consent to apply for a Crisis benefit.

LIHEAP Handbook 604.36,609.4, and 638.1 have been updated to clarify that a life- threatening situation is defined as a documented medical emergency. This documentation must come from a medical professional and should be related to a specific medical condition of a household member; documentation should be retained in imaging or case comments using collateral contact narration guidelines.

LIHEAP Handbook 605.2 has been updated. Roomers and households that rent with heat included will receive the full LIHEAP Cash benefit for which they qualify.

LIHEAP Handbook 609.1 has been updated to clarify that if no crisis exists or if a household resolves a crisis prior to a crisis pledge being made, a crisis application must be rejected using rejection codes in Chapter 677, Appendix A.

LIHEAP Handbook 610.1 has been updated to clarify the definition of a household. A *household* is defined as a person or group of persons, including related roomers, who live together in the same unit or structure as one economic unit that pays for its home-heating energy.

LIHEAP Handbook 610.2 has been updated to clarify that roomers should not have any utility bills in their name. If they do, they are not considered roomers.

LIHEAP Handbook 610.3 has been updated to clarify that individuals being cared for in domiciliary care or an individual providing domiciliary care are not counted as LIHEAP household members, based on the household for which the care is provided.

LIHEAP Handbook 614.1 has been updated to clarify college students who are unrelated roommates must be considered together as one LIHEAP household; if a roommate is not a resident of Pennsylvania, they and their income would be excluded from eligibility.

LIHEAP Handbook 619.2 has been updated to clarify if two households share a fuel tank, furnace, or meter, both households may be eligible for LIHEAP benefits if they can prove they have separate addresses or heating accounts.

LIHEAP Handbook 619.3 has been updated to clarify that if a LIHEAP applicant has a free primary heating source, they are not eligible for LIHEAP Cash benefits but may be eligible for Crisis Weatherization services for their primary heating source.

LIHEAP Handbook 619.4 has been updated to clarify a written statement from the account holder detailing the applicant’s responsibility for a heating bill in another person’s name is an acceptable example of proof of the applicant’s heating responsibility.

LIHEAP Handbook 619.5 has been updated to clarify that the CAO should discuss the advantages of choosing a participating vendor and the requirements to receive a Crisis benefit if they do not choose a participating vendor.

LIHEAP Handbook 619.6 has been updated to clarify that if a household on automatic delivery is within 15 days of running out of fuel, will not be able to pay for their next scheduled delivery, and therefore the vendor will not deliver to them, they would be considered to be in a Crisis situation.

LIHEAP Handbook 619.8 has been updated to clarify if the applicant does not have a heating bill in their name and it is paid by someone outside of the household because the household has zero/minimal income, they are not considered to have a heating responsibility and are ineligible for LIHEAP benefits.

LIHEAP Handbook 623.13 has been updated to clarify a household living in a tent or other mobile structure must meet the same verification requirements as a household living in a Camper or Recreational Vehicle.

LIHEAP Handbook 650.2 and 650.6 have been updated. AmeriCorps income is now excluded income for LIHEAP.

LIHEAP Handbook 650.2 has been updated to clarify that the CAO may accept proof other than tax returns to verify self-employment.

LIHEAP Handbook 650.8 and 678.2 have been updated. When a household reports zero or minimal income, and zero income has not already been verified, the CAO must ask the household to complete the HSEA 6 to explain how the household pays for basic living costs. The CAO is not required to request the HSEA 6 if zero-income has already been verified and documented in the case record for Supplemental Nutrition Assistance Program or Medical Assistance benefits. To be verified and documented, there must be a valid explanation on file of how the household pays for basic living costs. In response to the HSEA 6 request, in lieu of returning the form, the household can provide a written or verbal statement to explain how they pay for basic living costs. A verbal statement should be thoroughly narrated.

LIHEAP Handbook 678.3 has been updated to reflect that time no longer needs to be narrated when verifying heating responsibility through collateral contact.

LIHEAP Handbook 679.2 has been added to provide clarification for LIHEAP reconsiderations.

1. **Cash Component**

**Application of the Cash Grant**

A household can only receive one Cash benefit during the LIHEAP program year. The Cash benefit will be applied to the primary heating source by default, or the household can choose to have the Cash grant applied to a secondary heating source.

1. **Crisis Component**

**LIHEAP Crisis Policy**

**CAOs may begin issuing Crisis Payments to households when the LIHEAP Cash component opens on November 4, 2024. A household is in a home- heating crisis if:**

* + it is out of fuel;
	+ it will run out of fuel within 15 days;
	+ it has had its utility service stopped; or
	+ it has received a written notice that its utility service will be shut off within the next 60 days.

**To apply and be eligible for a LIHEAP Crisis benefit, a household must:**

1. Meet the general LIHEAP eligibility requirements of income limit, responsibility for heating costs, Pennsylvania residency, and citizenship (or lawfully admitted non-citizen status).
2. Be without heat or in imminent danger of being without heat because of a weather-related or energy-supply-shortage emergency.
3. Be eligible for a Crisis benefit that, alone or combined with other resources available to the applicant household, will resolve the home-heating emergency. Any existing credit on file with the vendor is considered available and must be used first for the resolution of the crisis.
4. Provide proof of the home-heating emergency.

NOTE: When LIHEAP Crisis is requested for a vendor prior to a LIHEAP Cash grant being received by that vendor, including a Cash grant that has been authorized and not yet received, a Crisis will be initiated for the full amount needed to resolve the Crisis situation if the household is otherwise eligible, regardless of whether the Cash grant would be sufficient to resolve the Crisis. The Cash benefit will be applied as a credit on the account if they are issued to the same vendor.

**Application of the Crisis Grant**

A household may receive more than one Crisis benefit during the program year, subject to the minimum and maximum amounts allowed under the current LIHEAP State Plan. The amount of a Crisis grant cannot exceed the amount necessary to resolve the crisis.

**Crisis Contractors**

This season Luzerne and Wyoming counties will not be using a crisis contractor.

**Weatherization Referrals**

CAOs can begin making Crisis referrals for the Weatherization Assistance Program when LIHEAP opens on November 4, 2024. Please refer to Section II (K) of the LIHEAP User Manual for procedures related to weatherization referrals.

When referring an applicant for Crisis Weatherization services, CAOs will scan both the HSEA 40 and fax the confirmation sheet to verify the CAO acted timely.

**Off-Hour Coverage**

Federal policy mandates that the Crisis component must be available seven days a week, 24 hours daily. For procedures related to after-hours Crisis requests, please refer to Section III (G) of the LIHEAP User Manual.

1. **Forms**

**HSEA 1 and HSEA 1.1 - LIHEAP Application Forms**

Only applications from this season will be accepted; applications must have a form date of “June 2024” and the season date range of “2024-25” in the title to be valid.

The Voter Registration section of the application has been updated to match the PA 600.

Question 16 has been added to the application. Applicants will answer “Yes” or “No” to whether they would like the Department of Human Services to share their information with their utility to help enroll their household in a utility or energy assistance program. On the Cash Provider Selection: Utility / Fuel Provider screen in eCIS, the worker should select “Yes” or “No” whether the applicant has given consent to datashare with utilities.

The HSEA 104 is a new form that will be mailed with every LIHEAP Cash approval notice. It explains the Crisis program and instructs households on how to apply.

**HSEA 104 – LIHEAP Crisis Flyer**

The HSEA 104 is a new form that will be automatically mailed with every LIHEAP Cash approval notice. It explains what the Crisis program is and instructs households on how to apply if they are experiencing a heating emergency.

1. **Vendors**

**LIHEAP Vendor Unit**

The LIHEAP Vendor Unit is available to help CAOs and vendors resolve any issues pertaining to LIHEAP payments. The vendor helpline can be reached by email at RA-LIHEAPVendors@pa.gov or by calling 1-877-537-9517, Monday through Friday from 8:00 AM to 4:00 PM.

Participating LIHEAP vendors have the option to receive Treasury payments and/or Remittance Advices (Vouchers) electronically. Vendors wishing to sign up for Electronic Funds Transfer (EFT) to initiate direct deposit must complete the PWEA 41, which is available on DocuShare. If vendors have any questions concerning EFT or wish to sign up for Electronic Remittance Advice, please instruct them to contact the LIHEAP Vendor Unit.

Payments to vendors are made by Treasury on the 13th calendar day after the close of the Voucher. Vouchers close on Thursday evening; therefore, LIHEAP payments should normally be received by vendors on a Wednesday. In addition to the option of receiving the Voucher by mail or electronically, Vouchers are also posted to each vendor’s Provider Reimbursement and Operations Management Information account where they are available for view on Monday, four days after the close of the Voucher.

**NEXT STEPS**

1. Implement the policy, procedures, and form instructions in this Ops Memo for the 2024-2025 program year.
2. This Ops Memo will become obsolete on June 30, 2025.