



# **2024-2025**

# LIHEAP Vendor

# Guidelines

Updated September 2024

LIHEAP Vendor Guidelines are derived from the 2023 LIHEAP Vendor Agreement. Guidelines are intended to provide vendors with policy and procedures for the Low Income Home Energy Assistance Program (LIHEAP), operated by Pennsylvania's Department of Human Services (DHS) through County Assistance Offices (CAOs). For additional information about LIHEAP, including a copy of these guidelines, see: <https://www.dhs.pa.gov/providers/Providers/Pages/LIHEAP-Vendors.aspx>

**Key points for the 2024-25 LIHEAP program year:**

- LIHEAP Season begins on 11/4/24, and is expected to end on 04/04/2025.
- To avoid a backlog of applications at the start of the season, COMPASS, the DHS online application system will allow 2023-24 LIHEAP Cash or Crisis grant recipients to apply online starting 8/26/24. Others who received LIHEAP last season will receive a pre-season application in the mail, prior to the official start of the season. Pre-season application processing will generate 2024-25 LIHEAP cash grants to vendors, starting October 16
- The minimum Cash benefit is \$200 and the maximum is \$1,000.
- The season maximum for Crisis is \$1,000 per household.
- If received on or before the date of the Crisis pledge (Treasury Pay Date), any credits from the LIHEAP Cash grant must be entered in the Crisis claims processing system, where they will be subtracted from the total cost of the delivery.
- Vendors must data-enter information into **PROMISE™**, the Commonwealth's claims management system, and submit proof of the termination or delivery/pickup before receiving a Crisis payment. The PROMISE™ website has been updated for the 2024/25 season: <https://LIHEAP.dhs.pa.gov>

**Important Vendor Information:**

- LIHEAP Vendor Agreements are typically updated every two years. The 2023 LIHEAP Vendor Agreement is active through June 30, 2025. **A new vendor agreement will be requested in the spring of 2025.**

**Vendor Agreement highlights:**

- A LIHEAP vendor must participate in both the Cash and Crisis components.
- Vendors must submit Crisis claims in PROMISE™ within 30 days of authorization to allow another Crisis to be authorized if necessary and to streamline the payment process.
- A vendor must agree to charge the lowest price for LIHEAP deliveries when it has a variable-pricing structure determined by factors such as when payment is received.
- Vendors must retain LIHEAP payment and delivery documents for at least four years.
- LIHEAP funds should NEVER be given or refunded to a customer, another vendor or to a local CAO. The money must be returned to LIHEAP headquarters in Harrisburg.

- Payment details (vouchers/RA) are posted in a PDF format to PROMISe™ 9 days before the Treasury pay date for vendors to credit customer accounts and schedule deliveries.

**The LIHEAP Cash Grant:**

Eligibility for a Cash grant is determined at the CAO based on type of heat, household size, heating region and annual income. The Pennsylvania Treasury sends Cash grants to vendors on a weekly basis by Electronic Funds Transfer (EFT/direct deposit) or by paper check.

- A household is eligible for only **one** Cash grant during the heating season.
- Current-year Cash grants can't be used to pay for oil, blended fuel, propane, coal, kerosene or wood that was delivered before Oct. 1, 2024, the first day of the federal fiscal year and the start of the 2024-25 heating season.
- LIHEAP Cash grant credits from the 2023-24 season should be used first and are available to the customer through June 30, 2025.
- Cash grants from the **current** season (2024-25) can be used for deliveries made through June 30, 2026.

**The LIHEAP Crisis Grant**

Eligibility for a Crisis grant is based on the existence of an emergency in which the household is without heat or in danger of being without heat.

Households must meet one of the following criteria to be considered in Crisis:

- The main or secondary heating source is a utility service that has been shut off or faces termination. (Only electricity is considered a secondary heating source, and electricity is only considered secondary if it's needed to power the main heating source.)
- Solid/liquid fuel is the main heating source and is completely depleted or is expected to be depleted within 15 days.

**Basic information about the Crisis grant:**

- Households that are without heat or are in danger of being without heat **within** 15 days may request help from their local county assistance office and be eligible to receive a Crisis benefit beginning 11/4/24 through the end of the LIHEAP season.
- The LIHEAP Cash grant is considered to be a credit and available for use toward a delivery **on the Treasury Pay Date it is received**. If the Cash grant has not been received by the vendor on the date the LIHEAP Crisis pledge is made, the CAO will pledge the entire delivery to be paid with Crisis funds. When submitting the claim in PROMISe, the vendor will not count the Cash grant. Instead, the Cash grant can be used toward a future delivery.

- When a CAO representative contacts a vendor to authorize a Crisis delivery of fuel and refers to Cash grant credits, vendor representatives must check the customer's account to **make sure those funds haven't already been delivered.**
- Every authorization is good for a **one-time-only** delivery or pickup of fuel.
- A vendor should **NOT** provide LIHEAP Crisis fuel to a customer until authorized to do so by a CAO representative. Deliveries made without a Crisis "pledge" won't be paid by LIHEAP.
- A Crisis grant can't be used to pay for fuel that was already provided to a customer before the LIHEAP crisis pledge was made.
- A Crisis authorization is not paid until data entry is completed by the vendor on PROMISe at <https://LIHEAP.dhs.pa.gov> and documentation of the delivery or the termination/reconnection notice is submitted by online upload, fax or mail.

#### **Crisis issuances:**

- The minimum Crisis benefit is typically \$25. The maximum Crisis grant is 'up to' \$1,000.
- **A household could qualify for more than one Crisis authorization during the season – but the season limit is \$1,000.**

#### **Crisis policy and procedures:**

Customers must make a request to a CAO for Crisis consideration if they face a heating emergency caused by being without fuel or being in imminent danger of being without fuel (within 15 days of running out), or because of utility termination or threat of termination.

When a customer makes a request for help with LIHEAP Crisis funds, a CAO representative will review the case record and contact the vendor to see if the LIHEAP cash grant was already delivered or if the vendor thinks LIHEAP credits already on the customer's account are sufficient to resolve the emergency by filling the tank. LIHEAP credits should be used first if funds have been received. IF needed to resolve the crisis, the CAO will issue a Crisis authorization number and provide the vendor with an "up-to" amount, with consideration of the crisis season maximum.

Unused LIHEAP Cash grants received prior to the Crisis pledge must be entered in PROMISe™, where they will be subtracted from the total cost of the delivery.

**If the LIHEAP Cash grant was approved but not yet received by the vendor,** those funds will not be part of the Crisis pledge.

Customers who are on **automatic delivery** may receive help from LIHEAP Crisis, but they must make a request for help to the CAO, and the CAO must contact the vendor to make a LIHEAP Crisis pledge, before the automatic delivery is made.

## The CAO representative will talk with the vendor to:

- provide the solid/liquid fuel dealer with an “up-to” amount that is available to the customer for a one-time delivery or pickup, not to exceed the season maximum. If funds are sufficient, the vendor should fill the customer’s tank.
- Ask a natural gas or electricity provider for the minimum amount needed to reconnect service or stop termination proceedings. The CAO representative may authorize no more than the season maximum of \$1,000.

**REMEMBER:** Every Crisis authorization to a solid/liquid fuel vendor is good for a **one-time-only** delivery or pickup of fuel. If a customer needs another Crisis delivery or pickup, and the household has not reached the season limit, the customer must ask the CAO for a new authorization. A CAO representative will contact the vendor if a new Crisis authorization is approved. An exception will be made if a customer needs to pick up fuel every few days/several times a month. In this case the vendor may combine/tally invoices and submit several pickups on the same Crisis authorization number **as long as the claim is submitted in PROMISe™ within 30 days of the authorization date.**

## **Time frames and other compliance with CAO:**

1. When a CAO representative determines a household is without heat, the representative will contact the vendor to request a delivery or have service reconnected within 48 hours. If the representative determines that a household member’s life is at risk, the deadline is 18 hours.
2. A household may contact the CAO to request help with a Crisis delivery **when it is within 15 days of being without heat.**
3. The CAO representative will ask the vendor to accommodate the request for a delivery/service restoration within a designated time frame, established by discussion with the customer (see #1 and #2 above). If the vendor is not able to respond within the designated time frame, the vendor must advise the CAO representative so that alternative measures can be taken. This could include authorizing a delivery by another vendor.
4. After authorization from a CAO representative, the vendor **must contact the customer to make arrangements for delivery/reconnection.** The discussion should include confirming the address, referencing the date of the previous delivery, evaluating how much fuel exists in the tank, and determining whether the customer has enough fuel to last until the next time the vendor is in their area (to avoid off-route delivery charges if possible). A delivery must be scheduled to accommodate the customer’s need. The vendor must make the customer aware of any fees associated with off-route or urgent deliveries.

## **Product Delivery:**

- Resolving a solid/liquid fuel heating emergency is defined as filling the tank (if sufficient LIHEAP funds are available to the customer).
- Fuel delivery must be for no more than the amount agreed upon with the CAO representative unless the customer (or other agency) agrees to pay for the overage.
- The delivery may be for a lesser amount if the energy product doesn’t fit into the customer’s tank or storage space.

5. Record retention: Vendors must save fuel-delivery documentation for four years regardless of whether it is a Crisis, Cash or Supplemental grant delivery.

### **Submitting Crisis claims for payment using PROMISe™:**

- Deliveries that require payment in full or in part with LIHEAP Crisis funds must be data-entered in PROMISe™ and should have been pledged by the CAO with a Crisis Auth #.
- A PowerPoint and Tip Sheet providing detailed information about PROMISe data entry, including screen shots, are available on the LIHEAP Vendor Website.
- Crisis claim data entry begins in PROMISe™ <https://LIHEAP.dhs.pa.gov> on Nov. 5, 2024.
- PROMISe™ is accessible to LIHEAP vendors 24 hours a day.
- PROMISe™ allows LIHEAP vendors to view all Crisis authorizations, submit Crisis claims and review all Crisis claims submitted during the heating season.
- The PROMISe™ system is designed to use Microsoft Edge. It may not be possible to file crisis claims using another web browser, i.e., Google Chrome, Firefox or Safari.

**IMPORTANT:** In addition to data entry in PROMISe™, vendors must submit proof of the Crisis delivery (shutoff notice, metered trip ticket, etc.) by using one of these methods:

- The preferred way to submit documentation is by scanning/uploading into PROMISe™
- Fax accompanied by a PROMISe™ Cover Sheet to **717-207-7997 or 717-207-7994**.
- Mail PROMISe™ Cover Sheet to: LIHEAP Crisis Documentation, PO Box 69028, Harrisburg, PA 17106.
- The commonwealth's secure document transfer: SeGov/MOVEit can be used to upload multiple Crisis cover sheets and documents. Contact the LIHEAP Vendor Unit for additional information to enroll in this program.

### **Helpful hints for successful PROMISe™ submissions:**

- Use the **Worklist** to manage Active and In-Progress Crisis authorizations. The *Worklist* provides information on the status of Crisis claims that have not yet been paid. Vendors can navigate from the *Worklist* to process a claim and return to the *Worklist* to process another claim. This seamless transition allows vendors to view and process claims quickly.
- If a CAO representative says the customer is eligible for up to \$1,000 in Crisis but the vendor finds the customer can only use \$200 worth of fuel, the vendor should submit a claim in PROMISe™ for \$200, not for \$1,000. The vendor is prohibited from filing a \$1,000 claim and then keeping the extra Crisis dollars for a future delivery.
- The customer's account number is displayed on the *Active Authorization* page and will automatically appear when the vendor processes a claim in PROMISe. **The vendor has the ability to change the account number if the one that displays is incorrect.** The corrected account number will appear on the vendor's remittance advice listing the payment.
- Remember to enter the LIHEAP Cash grant if it was received (Treasury Pay Date) on/before the date of the LIHEAP Crisis pledge. Credits are entered using Service Code Y9012.

- The amount of LIHEAP Crisis available to the customer is displayed on the vendor's Worklist in PROMISe. Submitting a LIHEAP Crisis claim for more than the customer has available will require the vendor to correct the data entry.
- **Vendors should use just one trip ticket for a delivery rather than splitting it into multiple tickets to reflect multiple funding sources.** Instead, write the amount of the Cash grant on the trip ticket and show the subtraction from the total amount of the delivery. Then, enter LIHEAP credits in PROMISe™, which will subtract the credits from the overall delivery costs and display the final amount that will be submitted for the Crisis payment.
- Vendors must click on the "Submit" button on the *Claim Submission Page* where the fuel type and delivery date are entered in PROMISe™. Failure to click on "Submit" means the claim has not been made even if the vendor faxes or mails in the documentation or uploads it.
- Documentation sent by FAX or US Mail requires the vendor to print the *PROMISe Cover Sheet* with the specific numbers pertaining to the authorization. Vendors must never hand-write anything on the cover sheet.

**NOTE:** if a Crisis authorization is not needed for the delivery or was issued in error, contact the Vendor Unit by email [RA-LIHEAPVendors@pa.gov](mailto:RA-LIHEAPVendors@pa.gov) or phone call **877-537-9517** and ask for the Crisis Auth to be retracted. Once retracted, the Crisis Auth will be removed from the vendor's Worklist the following day (overnight batch).

#### **LIHEAP Payments:**

- All payments for the LIHEAP are generated from the Pennsylvania Treasury in Harrisburg by U.S. mail or direct deposit on Wednesdays.
- Customer payments are included on one weekly check (or direct deposit), not as separate checks (or direct deposit) for each customer.
- Weekly payments include Cash grants approved during a designated 7-day period and the Crisis grants finalized during that period by vendor data entry and submission of documentation.
- **Direct Deposit/Electronic Funds Transfer** is an option for vendors, who are encouraged to sign up for direct deposit into a bank or financial institution of their choice. EFT eliminates mail time and prevents loss.
  - The EFT form can be downloaded from the LIHEAP Vendor Website: <https://www.dhs.pa.gov/providers/Providers/Pages/LIHEAP-Vendors.aspx>
  - Email the form w/a voided check to [RA-LIHEAPVendors@pa.gov](mailto:RA-LIHEAPVendors@pa.gov) or fax (717) 231-5516.

#### **Remittance Advice (RA)/Vouchers:**

- Remittance Advice documents are also referred to as RA's or vouchers. They are a list of customers posted weekly in PROMISe, where vendor representatives can access them as early as 9 days before the Treasury pay date.

- Vendors can access payment vouchers on PROMISe for the entirety of the LIHEAP season but should save the vouchers on their computer or USB drive for long-term keeping.
- Accessing LIHEAP vouchers in PROMISe in advance of the Treasury payment allows vendors to apply credits to individual customer accounts and arrange for deliveries.
- Vendors also have the option to receive RA's by U.S. mail or via the SeGOV (MOVEit) secure website. Vendors must have a static IP address to use SeGOV. If interested in receiving vouchers through one of these methods, call the LIHEAP Vendor Unit at (877) 537-9517.

**Important:** Record the **DHS individual (INDIV) number** associated with each customer listed on the RA, as these numbers are needed when LIHEAP funds are returned to DHS.

**Returning funds to DHS:** As noted on the LIHEAP Vendor Agreement, LIHEAP funds may need to be refunded. Sometime the need to submit a refund is discovered by the vendor and sometimes the LIHEAP Vendor Unit will request the return of LIHEAP funds.

Examples of refunds are:

- Customer moves to a location the vendor does not serve.
- Customer dies.
- Customer requests a vendor change.
- CAO representative sends LIHEAP funds to the wrong vendor.
- Vendor terminates participation in LIHEAP and customers have LIHEAP credit.
- Extended time frame for delivery of fuel/utility ends. (See Condition 7 of the LIHEAP Vendor Agreement.) **A LIHEAP Cash grant is available to the customer for 2 heating seasons. Grants must be used by June 30 of the year following the LIHEAP season for which the payment was made and if not – credit refunded.**

Vendors who need to return LIHEAP funds for any of these reasons must refund the money to DHS accompanied by a *LIHEAP Refund Form*, located on the vendor website:  
[www.dhs.pa.gov/providers/Providers/Pages/LIHEAP-Vendors.aspx](http://www.dhs.pa.gov/providers/Providers/Pages/LIHEAP-Vendors.aspx)

As noted in the examples above, the LIHEAP Vendor Unit may contact the vendor to discuss the need to return LIHEAP funds. As confirmation to that conversation, a dunning letter is generated by the LIHEAP system to confirm the request and will identify the customer and the dollar amount that must be returned.

The *LIHEAP Refund Form* and a check made payable to *Commonwealth of Pennsylvania* should be submitted to the address printed on the form. LIHEAP funds not returned by a vendor at the request of DHS will be recouped from a future treasury check. If that avenue is not available, the request will be referred to the Pennsylvania Office of Attorney General for collection.

**LIHEAP funds never should be sent to a customer or transferred to another vendor.**



**NOTE:** Vendors can opt for **Expedited Recoupment** that will allow the refund to be subtracted from the vendor's next payment, eliminating the need to submit a paper check. A form to request Expedited Recoupment is found on the LIHEAP Vendor Website.

**LIHEAP Vendor Helpline Contact Information:**

- LIHEAP Vendor Helpline: (877) 537-9517 Mon-Fri from 8:00 to 4:00
- Address: LIHEAP Vendor Unit, PO Box 2675 (WOB-224), Harrisburg, PA 17105
- E-mail address: [RA-LIHEAPVendors@pa.gov](mailto:RA-LIHEAPVendors@pa.gov)
- Fax: 717-231-5516
- web: <https://www.dhs.pa.gov/providers/Providers/Pages/LIHEAP-Vendors.aspx>

**Assistance provided by LIHEAP Vendor Helpline representatives:**

- Verify and retract Crisis authorizations.
- Provide information and assistance with connectivity to PROMISe™.
- Help vendors resolve LIHEAP Cash and Crisis payment issues.
- Answer all vendor policy and procedure questions.
- Facilitate communication between the County Assistance Office and the vendor.
- Help vendors with remittance advice (vouchers).
- Enroll vendors in direct deposit for their LIHEAP payments.
- Provide information regarding refunds and reissuance of payments.
- Enroll and deactivate companies as vendors.