

## *LIHEAP Household Report:*

### List of Checks to Complete Before Submission

This document provides a list of items for state grant recipients to check before submission of the annual *LIHEAP Household Report* (long form). If you can answer “yes” to all of the following questions, then you are ready to certify and submit their final *LIHEAP Household Report*.

<b><u>General Checks</u></b>			
<b>1.</b>	<b>Does the information you reported represent annual data for the entire federal fiscal year (October 1<sup>st</sup> to September 30<sup>th</sup>)?</b>  The data you used to complete this report should be data for the 12-month federal fiscal year period (October 1 <sup>st</sup> to September 30 <sup>th</sup> ), even if your program operates according to a different fiscal year schedule.	YES	NO
<b>2.</b>	<b>Does the data you reported represent households?</b>  The unit for LIHEAP counting is the household, rather than the number of persons in the household or home. The information you report on assisted households should represent households assisted with any LIHEAP funds.	YES	NO
<b>3.</b>	<b>Is the information you reported <u>final</u> data, rather than preliminary estimated data?</b>  Your preliminary Household Report may contain non-final or estimated data, but your final Household Report should contain final data derived and calculated from your data tracking system and program records.	YES	NO
<b>4.</b>	<b>If you have verified that all reported data are final, have you indicated in the report that all data are final?</b>  Once you have verified that all data are final, you should select “no” in response to the question: “Do the data below include estimated figures?” and should not have any checkboxes indicating estimated data throughout the report.	YES	NO
<b>5.</b>	<b>Have you included any important information for understanding or interpreting your data in the “Notes”?</b>  The “Notes” portion of the form should contain your responses to any warning messages you received when submitting your report, as well as descriptions of any data anomalies or important program changes or characteristics relevant to the data. Any figures that are estimated should be identified in the form and explained in the “Notes” section.	YES	NO

<b><u>Section I “Number of Assisted Households”</u></b>			
<b>6.</b>	<p><b>Have you reported the number of assisted households for each type of LIHEAP assistance that you provided during the fiscal year, and does this match the types of assistance you indicated you would provide in your Model Plan for the fiscal year?</b></p> <p>You should report the number of assisted households for each type of assistance you provided during the fiscal year. If you indicated in your Model Plan that you would provide a type of assistance, but did not actually provide that type of assistance, you should revise your Model Plan so that the reports are consistent.</p>	YES	NO
<b>7.</b>	<p><b>Is the number of households you reported for <i>Any Type of LIHEAP Assistance</i> the <u>unduplicated</u> number of households that received any kind of LIHEAP assistance, excluding nominal payments?</b></p> <p>If your program allowed households to receive multiple types of LIHEAP assistance during the fiscal year (such as by allowing the same household to receive both heating and weatherization assistance), the number you report for <i>Any Type of LIHEAP Assistance</i> should be less than the sum of households for each separate type of assistance, (excluding households receiving only nominal benefits). If your program allowed households to receive only one type of LIHEAP assistance each year (or only one benefit), the number you report for <i>Any Type of LIHEAP Assistance</i> should be the number of households calculated by adding together each separate type of assistance, and you should include an explanatory note in the “Notes” section to explain this. Additionally, the number of households you report for <i>Any Type of LIHEAP Assistance</i> should never be less than the number you report for Bill Payment Assistance.</p>	YES	NO
<b>8.</b>	<p><b>Is the number of households you reported for Bill Payment Assistance the <u>unduplicated</u> number of households that received any heating, cooling, crisis, or supplemental assistance used to help pay household energy bills?</b></p> <p>If your program allowed households to receive multiple types of bill payment assistance (such as by allowing the same household to receive both heating and crisis assistance), the number you report for Bill Payment Assistance should be less than the sum of households for each separate type of bill payment assistance. If some households only received equipment repair and replacement, weatherization assistance, or nominal payments, the number you report for Bill Payment Assistance should be less than the number you report for <i>Any Type of LIHEAP Assistance</i>. The number of households you report for Bill Payment Assistance should never exceed the number you report for <i>Any Type of LIHEAP Assistance</i>.</p>	YES	NO

9.	<p><b>If your state provided nominal benefits, have you reported the number of households that received nominal payments, and have you included a note which describes the nominal payments program and the amount of assistance each household receives?</b></p> <p>Grant Recipients that provided nominal payments to SNAP households should report the number of households that received a nominal payment and include details in the “Notes” portion of the form to explain this component of your program and to provide the nominal payment amount each household received.</p>	YES	NO
10.	<p><b>Did you report all types of crisis assistance?</b></p> <p>You should report the number of households assisted with your primary bill payment crisis assistance under one of the following lines: Year-Round Crisis assistance, Winter Crisis assistance, and/or Summer Crisis assistance. If you provided emergency equipment assistance, report this under the Emergency Furnace Repair &amp; Replacement line. Report any additional distinct crisis assistance you provided under “Other Crisis” Assistance with an explanation about this assistance in the “Notes” portion of the form.</p>	YES	NO

<b><u>Section II “Number of Assisted Households by Poverty Interval”</u></b>			
11.	<p><b>Do all households that received LIHEAP assistance have incomes at or below the poverty threshold for income-eligible households that you indicated in your Model Plan?</b></p> <p>If not, you should either modify your Model Plan to reflect the way your program operated during the fiscal year or include a note which explains the discrepancy.</p>	YES	NO
12.	<p><b>Do the “By Poverty Interval” Counts for assisted households (Section II) add up to the Total Number of Households that are reported in Section I for each type of assistance, and did all households have poverty interval information?</b></p> <p>If any household were missing poverty interval information, you should include a note in the “Notes” portion of the form to explain the issue and how you accounted for these households.</p>	YES	NO

<b><u>Section III “Number of Assisted Households by Vulnerable Populations”</u></b> <b><u>and Optional Section IV “Number of Assisted Households by Young Child</u></b> <b><u>Age Category (Optional)”</u></b>			
13.	<p><b>For each type of assistance, is the <u>unduplicated</u> count of households with an elderly member, disabled member, or young child (Column D) greater than the count of households reported for each separate vulnerable category in Columns A, B, and C?</b></p> <p>For each row in Section III, verify that the count for Column A (number of elderly households), Column B (households with a disabled member), and Column C (households with a young child) are each less than the count in Column D. If the number of households reported in Column D is equal to the number of households reported in Column A, Column B, or Column C, please include an explanatory note in the “Notes” section.</p>	YES	NO
14.	<p><b>For each type of assistance, is the <u>unduplicated</u> count of households with an elderly member, disabled member, or young child (Column D) less than the sum of the count of households reported for each separate vulnerable category in Column A, B, and C?</b></p> <p>For each row in Section III, add up the counts in Columns A-C (households with an elderly member, households with a disabled member, and households with a young child), and verify that the sum is greater than the count in Column D (households with any vulnerable member). If the number of households reported in Column D is equal to the sum of households reported in Columns A-C this means that no household had more than one type of vulnerable member; please include an explanatory note in the “Notes” section if this is the case.</p>	YES	NO
15.	<p><b>For each type of assistance, is the number of households with a vulnerable member reported in Section III less than the total number of assisted households reported in Section I?</b></p> <p>Vulnerable households should be a subset of the population reported in Section I, so for each type of assistance, the number of vulnerable households should be less than the total number of households served. This means that for each type of assistance, the number of households reported in Column A (households with an elderly member), Column B (households with a disabled member), Column C (households with a young child), and Column D (households with any vulnerable member), should be less than the number of households reported in Section I. If this is not the case and there is an explanation for this, please make sure there is a note in the “Notes” section or an explanation in your Model Plan.</p>	YES	NO
16.	<p><b>Is the number of households you reported for <i>Any Type of Assistance</i> for each vulnerable category the <u>unduplicated</u> number of households that received any kind of LIHEAP assistance?</b></p>	YES	NO

	<p>If your program allowed households to receive multiple types of LIHEAP assistance (such as by allowing a household to receive both heating and weatherization assistance), the number you report for <i>Any Type of Assistance</i> should be less than the number of households calculated by adding each separate type of assistance for each vulnerable category (Columns A-D), unless households can only receive one type of LIHEAP assistance each year. For each vulnerable category, if the sum of households receiving each type of LIHEAP assistance equals the number of households reported for <i>Any Type of Assistance</i>, please include a note in the “Notes” section.</p>	
17.	<p><b>If you reported the optional information on the number of assisted households by young child category for Section IV:</b></p> <p><b>For each type of assistance, is the <u>unduplicated</u> number of assisted households with a young child (Section III, Column C) less than the sum of the counts in Column A and B of Section IV?</b></p> <p>The sum of the unduplicated number of households with a child less than 2 years old (Section IV, Column A) and the unduplicated number of households with a child aged 3-5 (Section IV, Column B) should be greater than the unduplicated number of households with a child that is 5 years or younger (Section III, Column C). This should occur because a portion of households should have both children under 2 years old and children that are 3-5 years old.</p>	YES NO

**Section V “Number of Assisted Households Owner/Renter Status, Section VI “Number of Assisted Household Applicants by Race and Ethnicity,” and Section VII “Number of Assisted Household Applicants by Gender,”**

18.	<p><b>Did you report information based on the main applicant for each assisted household?</b></p> <p>Sections V-VII ask you to report households according to the demographic information of the main applicant. Report households in Section V depending on the main applicant’s owner/renter status. Report households in subsections A and B of Section VI depending on the main applicant’s self-reported race and ethnicity. Report households in Section VII depending on the main applicant’s self-reported gender.</p>	YES NO
19.	<p><b>Did you include households with unknown demographic information for the main applicant under “Unknown/not reported”?</b></p> <p>If you are missing the demographic information of the main applicant, report the household under the “Unknown/not reported” line in Sections V-VII.</p>	YES NO

<b><u>Section VIII “Assisted Household Members by Race and Ethnicity” and Section IX “Assisted Household Members by Gender”</u></b>	
<b>20.</b>	<p><b>Did you include household members with unknown demographic information under “Unknown/not reported”?</b></p> <p>If you are missing the demographic information of household members, report them under the “Unknown/not reported” line in Sections VIII and IX.</p>
	<div style="text-align: right;"> YES      NO </div>