

LIHEAP Performance Measures Data Collection Guide

Supplement: Electric Vendor Data Exchange Template

OVERVIEW

New LIHEAP Performance Measures require states to obtain annual main heating fuel and electric bill data from vendors for LIHEAP households. This document, one in a set that provides guidance for facilitating data transfers with all types of fuel vendors, provides guidance specifically for data transfers with electric vendors.

STEP 1 – List of Customer Accounts

We will compile and send you a list of households that have received benefits through the Low-Income Home Energy Assistance Program (LIHEAP). These program participants have indicated that your company furnishes electric service to their household and have signed an Authorization Form that allows you to release data to us.

STEP 2 – Prepare a Data File with Customer Charge Information

Please furnish an electronic data file with monthly electric billing and usage information for customers with matching records for the **reporting period**. The extract should furnish one record for each month for each customer. Alternatively, the extract can furnish one annual charge for each customer (if available).

You will also report for each household in the file we provided:

1. **Tenure in the Home.** Please indicate if the customer lived at the service address for the entire reporting period or just part of that period (or if you don't know).

STEP 3 – Return Data File via CD or FTP

The data can be delivered in a password-protected file via e-mail, on a password-protected CD, or via a secure FTP site.

FREQUENTLY ASKED QUESTIONS

1. Why are we collecting this data?

New LIHEAP Performance Measures require grantees to obtain annual main heating fuel and electricity bill data from vendors for LIHEAP households.

2. What data are to be reported and in what format?

The billing information should identify the account number, the account name, the service address, the date the meter was read, meter read code, days in the billing cycle, usage, tenure in the home, as well as the electric charges (for each month of the reporting period, or for the entire reporting period). See the attached forms for an example of how we would like the data formatted. We are most interested in the annual energy cost and usage of each household.

3. How do I know that this information request does not violate my customer's privacy?

All LIHEAP clients have signed authorization forms to release energy information. As part of that agreement, we ensure that your customers' data will be kept confidential. In addition, the information you provide will be protected and remain undisclosed. Results will be reported in the aggregate; cost information will not be associated with the housing units, account numbers, or the names of the clients in any way.

TEMPLATE - Grantee <u>ELECTRIC</u> Data Request (sent by grantee to vendor)								
Electric Account Number	ACCOUNT Last Name	ACCOUNT First Name	Site Number	Service Address Line 1	Service Address Line 2	City	State	Zip Code

SAMPLE - Grantee <u>ELECTRIC</u> Data Request (sent by grantee to vendor)								
Account Number	Account Last Name	Account First Name	Site Number	Service Address Line 1	Service Address Line 2	City	State	Zip Code
1	Smith	Amy		1 Main St.		PENDLETON	OR	97801
2	Smith	Bob		2 Main St.		BOARDMAN	OR	97818
3	Smith	Carrie		3 Main St.		BOARDMAN	OR	97818
4	Smith	David		4 Main St.		BOARDMAN	OR	97818
5	Smith	Erik		5 Main St.		HERMISTON	OR	97838

TEMPLATE - LIHEAP Household <u>ELECTRIC</u> Cost and Consumption Data (report populated by vendor then sent to grantee)									
Account Number	Account Name	Service Address Line 1	Service Address Line 2	City	State	Zip Code	Annual Electric Usage (kWh)	Annual Electric Charge (\$\$\$cc)	Full Year at Service Address? (Y/N/DK)

SAMPLE - LIHEAP Household <u>ELECTRIC</u> Cost and Consumption Data (report populated by vendor then sent to grantee)									
Account Number	Account Name	Service Address Line 1	Service Address Line 2	City	State	Zip Code	Annual Electric Usage (kWh)	Annual Electric Charge (\$\$\$cc)	Full Year at Service Address? (Y/N/DK)
1	A. Smith	1 Main St.		PENDLETON	OR	97801	8215	\$657.20	Y
2	B. Smith	2 Main St.		BOARDMAN	OR	97818	6172	\$493.76	Y
3	C. Smith	3 Main St.		BOARDMAN	OR	97818	7345	\$587.60	DK
4	D. Smith	4 Main St.		BOARDMAN	OR	97818	6402	\$512.16	N
5	E. Smith	5 Main St.		HERMISTON	OR	97838	7990	\$639.20	Y