

LIHEAP Performance Measures Data Collection Guide

Supplement: Fuel Oil/Kerosene 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 fuel oil/kerosene 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 fuel oil and/or kerosene 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 fuel oil and/or kerosene billing and usage information for customers with matching records for the **reporting period**. The extract should furnish one record for each delivery for each customer. Alternatively, the extract can furnish one annual charge and annual consumption information 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).
2. **"12-Month" Customer.** You will indicate whether the household was a "12-month" customer during the reporting period (i.e., they purchased their fuel from your company only), a "periodic" customer (i.e., you know they purchased fuel from multiple fuel oil/kerosene companies during the reporting period), or you don't know the customer's fuel-purchase behavior.

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, usage, and fuel oil and/or kerosene charges (for each delivery made during the reporting period or for the entire reporting period), tenure in the home, and whether the household was a full-reporting period (12-month) customer. See the attached forms for an example of how we would like the data formatted. We are most interested in the annual energy cost 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>FUEL OIL/KEROSENE</u> Data Request (sent by grantee to vendor)							
Fuel Oil/Kerosene Account Number (if applicable)	ACCOUNT Last Name	ACCOUNT First Name	Service Address Line 1	Service Address Line 2	City	State	ZIP Code

SAMPLE - Grantee <u>FUEL OIL/KEROSENE</u> Data Request (sent by grantee to vendor)							
Fuel Oil/Kerosene Account Number (if applicable)	ACCOUNT Last Name	ACCOUNT First Name	Service Address Line 1	Service Address Line 2	City	State	ZIP Code
131313ABCD	David	James	1708 London Road	Apartment 1A	Ewing Township	NJ	08638
242424DCBA	Smith	Arlene	21 Columbia Avenue		West Trenton	NJ	08628
353535EFGH	Jones	Trayvon	627 Bear Tavern Road		Pennington	NJ	08534
464646HGFE	Brown	Gabriela	3 Doctors Lane		Hopewell	NJ	08525
575757IJKL	Lewis	Gena	226 Broadway	Unit 2	Princeton	NJ	08540
686868LKJI	Lopez	Camille	13 North Main Street		Lawrenceville	NJ	08648

TEMPLATE - LIHEAP Household FUEL OIL/KEROSENE Cost and Consumption Data (report populated by vendor then sent to grantee)

Fuel Oil/Kerosene Account Number	Account Name	Service Address Line 1	Service Address Line 2	City	State	Zip Code	Annual Fuel Oil/ Kerosene Usage (Gallons)	Annual Fuel Oil/ Kerosene Costs (in Whole \$)	Full Year at Service Address? (Y/N/DK)	Is This a 12-Month Client? (Y/N/DK)

SAMPLE - LIHEAP Household FUEL OIL/KEROSENE Cost and Consumption Data (report populated by vendor then sent to grantee)

Fuel Oil/Kerosene Account Number	Account Name	Service Address Line 1	Service Address Line 2	City	State	Zip Code	Annual Fuel Oil/Kerosene Usage (Gallons)	Annual Fuel Oil/Kerosene Costs (in Whole \$)	Full Year at Service Address? (Y/N/DK)	Is This a 12-Month Client? (Y/N/DK)
131313ABCD	James David	1708 London Road	Apartment 1A	Ewing Township	NJ	08638	625	\$1,331	Y	Y
242424DCBA	Arlene Smith	21 Columbia Avenue		West Trenton	NJ	08628	890	\$1,860	Y	Y
353535EFGH	Trayvon Jones	627 Bear Tavern Road		Pennington	NJ	08534	740	\$1,598	Y	Y
464646HGFE	Gabriela Brown	3 Doctors Lane		Hopewell	NJ	08525	1,025	\$2,060	N	Y
575757IJKL	Gena Lewis	226 Broadway	Unit 2	Princeton	NJ	08540	549	\$1,169	Y	DK
686868LKJI	Camille Lopez	13 North Main Street		Lawrenceville	NJ	08648	750	\$1,658	Y	Y