Reminders for Completing the FY 2019 Household Report

LIHEAP Webinar hosted by the Office of Community Services (OCS) in the Administration for Families and Children (ACF) presented by APPRISE under contract to OCS

November 19, 2019

Welcome:
Patrice West (OCS)

Presenters:
Melissa Torgerson (Verve Associates)
Dan Bausch (APPRISE)

ADMINISTRATION FOR
CHILDREN & FAMILIES

Welcome

- **Purpose of This Webinar**
  - To provide a refresher on the requirements for the Household Report– Long Form.
  - To provide LIHEAP Coordinators and staff with key reminders.

- **Audience for This Webinar**
  - Coordinators who have previously completed the Household Report- Long Form.
  - Staff that assist with completing the Household Report.

Presenter(s): Patrice West

Webinar Overview

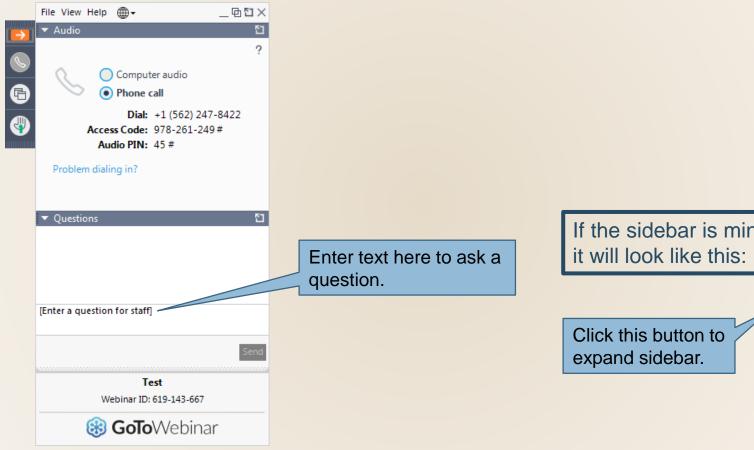- **Structure of The Webinar**
  - 30-minutes to review key information.
  - Slides available for download now under "Handouts" in the GoToWebinar Sidebar.
  - The webinar is being recorded and will be published on the ACF YouTube channel.

- **Have a question?**
  - You are encouraged to ask questions as you have them by typing them into the GoToWebinar "Question" box.
  - Submitted questions will be reviewed and responded to at the end of the webinar or via an e-mail from APPRISE.

Presenter(s):
Melissa Torgerson

Before We Begin
What Questions Do You Have on Completing the Household Report?

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Presenter(s):
Melissa Torgerson

Presentation Outline

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Overview of the Household Report

- The Report allows OCS to report information to Congress about LIHEAP outcomes, as required by the statute.

- Grantees must…
  - Submit preliminary data in September as part of their application for LIHEAP funds. Data can be estimated.
  - Submit final non-estimated data by **December 16th.**

- **There are no changes to the FY 2019 Household Report. The requirements are the same as those for the FY 2018 Report.**

- Grantees can review the prior instructions for reporting each item in the Household Report – Long Form

  https://www.acf.hhs.gov/ocs/resource/liheap-at-2019-02-household-report-short-form-and-long-form-for-fy-2018

Presenter(s):
Dan Bausch

Reminders of Reporting Rules for the Household Report

Reminders of Reporting Rules

- Grantees should…

  1. Review the instructions on correctly reporting each item.

  2. Utilize a *data reporting system* to identify and count households for each reporting item using data tracking systems and program records.

  3. Add to the **Notes section** to explain any reported information that is out of the ordinary, generates a warning in OLDC, or requires clarification.

  4. Report on Households that *Received Assistance During FY 2019* in Section I, II, III & VI; Report Households that *Applied for Assistance* During FY 2019 in Sections IV and V.

Presenter(s): Melissa Torgerson

Data Validation and Checks

Data Validations and Checks
How Do I Check My Report Before Submitting?

- Compare your report to your prior year report.
- Use the "Check Before You Submit" Document:
  https://liheappm.acf.hhs.gov/sites/default/files/private/grantee_tools/best_practices/Household-Report-Check-Before-You-Submit-Document.pdf

Section II "Number of Assisted Households by Poverty Interval"

11.	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? 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.	YES	NO
12.	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? 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.	YES	NO

Presenter(s):
Dan Bausch

Data Validations and Checks
OLDC Messages and Review Process

Checks in OLDC Prior to Submission

- Validation checks are programmed into OLDC, and a warning or error message will appear if a check fails. Please review these before you submit.
  - Warning Messages indicate data that may be correct, but require confirmation and additional explanation in the "Notes" section of the form.
  - Fatal Error Messages indicate inconsistent data that must be corrected before grantees are able to submit their Household Report in OLDC.

Checks After You Submit

- APPRISE checks data following submission in OLDC and will e-mail grantees to alert them to any issues or questions based on their review.

- When your report is confirmed as complete, your liaison will accept it in OLDC.

- If you later identify a correction or change is needed, you will need to submit a revision in OLDC.

Presenter(s):
Dan Bausch

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Common Reporting Issues & Reminders

Common Reporting Issues
Reminder #1 – Indicating Data are Final

- The preliminary Household Report (due in September) may contain non-final or estimated data. However, <u>the final Household Report must contain final data</u> from grantee data tracking systems and program records.

- **Once all data in the Household Report are final, grantees must:**

  - Select "no" in response to the question in the Instructions Section: *"Do the data below include estimated figures?"*

  - Uncheck any "estimated data" checkboxes in Sections I and IV.

Presenter(s):
Melissa Torgerson

Common Reporting Issues
Reminder #2 – Consistency with Model Plan

- If a grantee indicated that it planned to provide a particular type of assistance in their FY 2019 Model Plan, we would expect to see households reported under that type of assistance in their FY 2019 Household Report.

- We would expect grantees to only report households that fall within the gross income thresholds specified in their Model Plans for each type of assistance.

  - **REMINDER**: Grantees should assign each household to a poverty interval using the 2018 HHS Poverty Guidelines, which were in effect at the beginning of FY 2019. They are available here: https://www.acf.hhs.gov/ocs/resource/hhs-poverty-guidelines-for-optional-use-in-ffy-2018

- Grantees should add notes to explain any inconsistencies with their Model Plan.

Presenter(s):
Melissa Torgerson

Common Reporting Issues
Reminder #3 – Reporting Unduplicated Counts

Grantees should report an <u>unduplicated count</u> for each data element.

- **If a household received *multiple benefits for the same type of assistance…***
  - That households is only counted <u>once</u> when reporting the count of households that received that type of assistance.
    - For example, a household receiving Heating Assistance at two separate times during the fiscal year should only be included <u>once</u> in the Heating Assistance lines.

- **If a household receives *more than one type of assistance…***
  - That household should be included in the unduplicated count for each type of assistance.
    - For example, if a household received both Heating Assistance and Cooling Assistance, it should be included in <u>both</u> the Heating Assistance lines and the Cooling Assistance lines.

- **When you are calculating the number of households that received *Bill Payment Assistance* or *Any Type of LIHEAP Assistance…***
  - Each household should only be counted only <u>once</u>.
    - For example, if a household received three different types of assistance, you should only include the household once in the "Any Type of LIHEAP Assistance" lines.

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Presenter(s):
Dan Bausch

Common Reporting Issues
Reminder #3 – Reporting Unduplicated Counts

- **If a household has *more than one type of vulnerable member*…**
  - That household should be included in the unduplicated count for each applicable vulnerability.
    - For example, if a household has an elderly member and a young child, that household should be included in <u>both</u> the count of households with an elderly member and the count of households with a young child.

- **When you are calculating *the number of households that have Any Type of Vulnerable Member (Elderly, Disabled, or Young Child)***
  - Each household should only be counted only <u>once</u>.
  - You should NOT simply add Elderly + Disabled + Young Child because households can have more than one type of vulnerability.
    - For example, if a household has an elderly member and a young child, that household should be included only once in the count of households with any type of vulnerability.

III. Number of Assisted Households by Vulnerable Population

Number of assisted households with at least one member of the following target groups

Type of LIHEAP assistance	A. 60 years or older (elderly)	B. Disabled	C. Age 5 years or under (young child)	D. Elderly, disabled, or young child
1. Heating	2	3	1	4
2. Cooling				

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Common Reporting Issues
Reminder #4 – Weatherization and Crisis

- Some grantees may not directly capture information about weatherization assistance or crisis assistance in their primary LIHEAP data tracking systems.

- In this situation, Grantees do need to obtain household-level data from their subgrantees or program partners who record this information. Grantees need this to identify which households received other types of LIHEAP assistance in order to calculate and report the count of households that received Any Type of LIHEAP Assistance.

- Please contact APPRISE if you need assistance with this.

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FY 2019 Household Report
Reporting Reminders Cheat Sheet

Here are key reminders for you and your staff to successfully complete the FY 2019 Household Report.

1. **Update your preliminary report to use <u>final data derived from your data system</u>**. *Once your report is updated, uncheck the estimated data boxes.*

2. **Report on <u>all</u> types of assistance you provided**. *If your report differs from what was indicated in your FY 2019 Model Plan, please explain this in the notes.*

3. **Report <u>unduplicated</u> household counts.** *The focus of the report is the count of households that received or applied for each type of assistance.*

4. **Obtain data/information from <u>partners</u>**. *Report on each LIHEAP program component and request household-level data if needed.*

5. **Report Households by Poverty Interval Using the <u>FY 2018 HHS Poverty Guidelines</u>.** *The report asks all grantees to report using these guidelines for consistency in reporting.*

6. **<u>Add notes </u>to explain unique program features or provide responses to OLDC warning messages.** *Notes help with understanding the report and minimizing report follow-up.*

Final Reminders

Final Reminders
FY 2019 Report Status

- There are <u>no changes</u> to the FY 2019 Household Report. The requirements remain the same as those for last year's FY 2018 Report.

- The final Household Report is due in OLDC on **December 16th.**

- Remember that the Household Report must be:
  - Entered in OLDC
  - Saved in OLDC
  - Certified by the appropriate person
  - Submitted by the appropriate person

Presenter(s):
Dan Bausch

Final Reminders
OLDC Resources

- OLDC is accessed through Grant Solutions.

- Log-in to Grant Solutions at https://www.grantsolutions.gov/gs

- Once logged in, click "OLDC" in the top taskbar to access the OLDC homepage.

- If you need assistance, please contact Grants Center Of Excellence Systems Help Desk:

  - (202) 401-5282 or (866) 577-0771

  - help@grantsolutions.gov

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Final Reminders
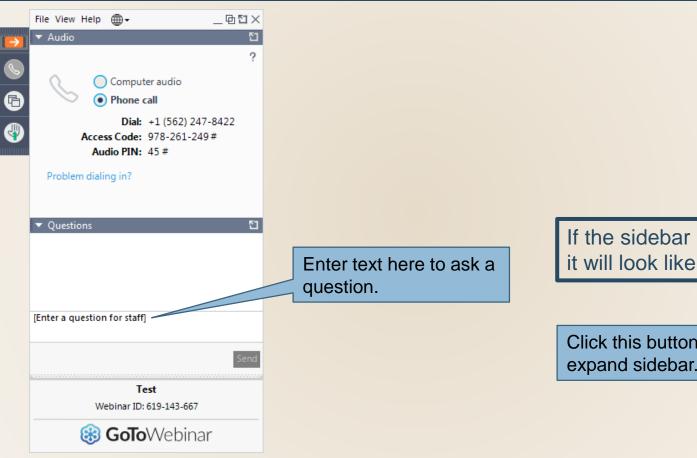## *Support Resources*

OCS liaisons

http://www.acf.hhs.gov/programs/ocs/resource/division-of-energy-assistance-federal-staff

APPRISE Team

- Daniel Bausch, Daniel-Bausch@appriseinc.org; 609-252-9050
- Jorge Mancilla, Jorge-MancillaUribe@appriseinc.org; 609-252-9009
- Elena Rubino, Elena-Rubino@appriseinc.org; 609-252-8011
- Georgios Anagnostopoulos, g-Anagnostopoulos@appriseinc.org; 609-252-9055
- Pragya Chauhan, Pragya_Chauhan@appriseinc.org; 609-252-9057
- Melissa Torgerson, melissa@verveassociates.net; 503-706-2647

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GoToWebinar Question Box

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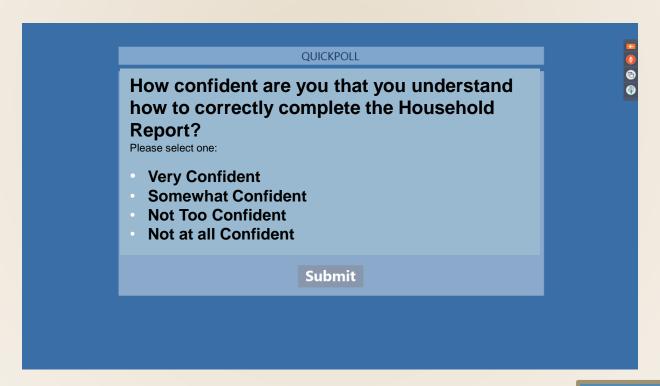If the sidebar is minimized, it will look like this:

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Audience Poll Question #1

- How confident are you that you understand how to correctly complete the Household Report?

QUICKPOLL

How confident are you that you understand how to correctly complete the Household Report?
Please select one:

- **Very Confident**
- **Somewhat Confident**
- **Not Too Confident**
- **Not at all Confident**

Submit

Presenter(s):
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Audience Poll Question

- Review Audience Responses

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