

# **FY 2021 Household Report Long Form**

## ***What's New for FY 2021 Reporting***

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

**November 4, 2021**

**Welcome:**

Sharnice Peters

**Presenters:**

Melissa Torgerson (Verve Associates)

Dan Bausch (APPRISE)



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# Welcome

- **Purpose of This Webinar**

- To furnish an overview of the FY 2021 Household Report.
- To explain the approach for reporting on households assisted with supplemental funds, including CARES Act or ARPA funds.
- To review examples of different reporting scenarios based on different uses of supplemental funds.
- To highlight key reminders and ways to avoid common reporting issues.

- **Audience for This Webinar**

- LIHEAP State and applicable Territory Coordinators.
- Staff that assist with completing the Household Report – Long Form.

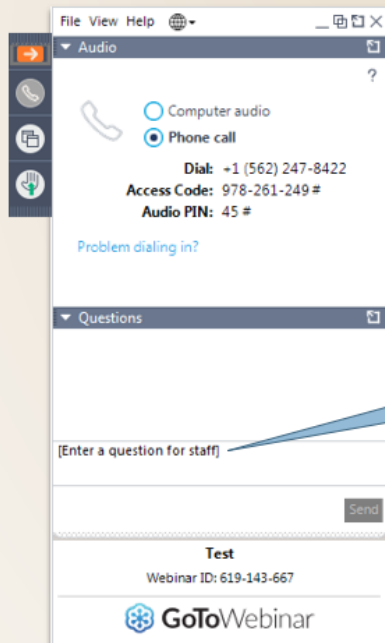
# Webinar Overview

- **Structure of The Webinar**
  - 60-minutes to review key information and provide a detailed review of the FY 2021 form changes.
  - **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.

# GoToWebinar Question Box

- **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.



Enter text here to ask a question.

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Click this button to expand sidebar.



Presenter(s):  
Melissa Torgerson

# Presentation Outline

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| 1. | Overview of the Household Report            | <b>Slide 7</b>  |
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# Audience Poll Question #1

## QUICKPOLL

**Which of the following best describes your role and experience with the LIHEAP Household Report (HHR)?**

Please select one:

- **LIHEAP Coordinator – Experienced with the HHR**
- **Newer LIHEAP Coordinator – Limited Experience with the HHR**
- **State LIHEAP Staff Member Who Works on the HHR**
- **Contractor Who Helps Complete the Report**
- **None of the Above (OCS staff, OCS contractors, etc.)**

# Overview of the Household Report

## *History and Purpose*

- The Household Report has been submitted by grantees since the 1980s.
- The Report allows OCS to report information to Congress about LIHEAP outcomes, as required by the statute.
- Two main types of data need to be reported:
  - Information on households that received LIHEAP assistance
  - Information on households that applied for LIHEAP assistance
- Data are...
  - Published in the annual *LIHEAP Report to Congress*
  - Published in the [LIHEAP Data Warehouse](#)
  - Used to respond to Congressional and White House inquiries

# New Updates to the Household Report

## *Changes Last Year for the FY 2020 Report*

- Last year, HHS revised the Household Report to include new lines for supplemental funding releases. These changes were made to allow HHS to separately identify the impact of supplemental federal LIHEAP funding.
- For each type of assistance, there were two lines required for reporting:
  1. Total Households
  2. The subset of households assisted with LIHEAP CARES Act funds

I. Number of Assisted Households		
Number of assisted households		
Type of LIHEAP assistance	A. Select if estimated data	B. Total Number of Households
1. Heating	<input type="checkbox"/>	<input type="text"/>
2. Heating (CARES Act funding only)	<input type="checkbox"/>	<input type="text"/>
3. Heating (Reserved for other supplemental funding)		

- A third line was reserved for other supplemental funding releases, but not open or editable in FY 2020's report.

# New Updates to the Household Report

## *Award of Supplemental ARPA Funds*

- In March of 2021, the President signed into law the American Rescue Plan Act of 2021 (ARPA) (Public Law No: 117-2). Pursuant to SEC. 2911 of H.R. 1319, as part of the American Rescue Plan Act of 2021, Congress appropriated approximately \$4.5 billion in supplemental funds for LIHEAP.
- HHS released the ARPA funds for LIHEAP in May 2021. Any portion of LIHEAP ARPA funds could be obligated in FFY 2021 or later during FFY 2022.
- The Dear Colleague Letter announcing the award of LIHEAP ARPA funds notified grantees that they “must track, account for, and report on” these funds.  
<https://www.acf.hhs.gov/ocs/policy-guidance/liheap-dcl-2021-05-supplemental-funding-release-fy-21>

# New Updates to the Household Report

## *Award of Supplemental ARPA Funds*

- The release of the ARPA funds meant that grantees *may* have provided assistance to households during FY 2021 with up three different types of federal LIHEAP funds:
  1. **Regular LIHEAP Funds**, including Block Grant funds or Reallotment Funds
  2. **LIHEAP CARES Act Funds**
  3. **LIHEAP ARPA Funds**

# New Updates to the Household Report

## *Updates for the FY 2021 Report*

- Because the ARPA funds were released during FY 2021, HHS has opened the third line on the report.
- For each type of assistance, there are now three lines required for reporting:
  - Total Households
  - The subset of households assisted with LIHEAP CARES Act funds
  - NEW: The subset of households assisted with LIHEAP ARPA funds**

I. Number of Assisted Households		
<u>Number of assisted households</u>		
<u>Type of LIHEAP assistance</u>	<u>A. Select if estimated data</u>	<u>B. Total Number of Households</u>
1. Heating	<input type="checkbox"/>	<input type="text"/>
2. Heating (CARES Act funding only)	<input type="checkbox"/>	<input type="text"/>
3. Heating (American Rescue Plan Act funding)	<input type="checkbox"/>	<input type="text"/>

- The reporting of this information assists HHS in identifying and reporting the impacts of supplemental LIHEAP funds on serving eligible households.

# New Updates to the Household Report

## *Summary*

- There are no changes to the form structure or sections for the FY 2021 Household Report.
- For each type of assistance, grantees still report on total households (first line) and the subset of households that were assisted with CARES Act funds (second line).
- **The only change from last year's FY 2020 report is that grantees must now report information on the subset of households that were assisted with LIHEAP ARPA funds during FY 2021 (third line).**
- As with last year's report, the report must be submitted via OLDC.

# Key Concepts for Reporting



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# Key Concepts for Reporting *Data Needed*

Grantees need the following information for each household:

- **Types of Assistance Received and Funds Used**
  - Regular Assistance Types (heating, cooling)
  - Crisis Assistance Types (winter, summer, year-round, other)
  - Weatherization
  - Nominal Benefits (SNAP)
- **Household Poverty Interval**
  - Assigned Poverty Interval based on household poverty level
- **Vulnerable Member Information**
  - Elderly household member (60+ years old)
  - Disabled household member
  - Young children under age six
  - OPTIONAL – Young children under age 3
  - OPTIONAL – Young children age 3 to 5

# Key Concepts for Reporting *Assisted and Applicant Households*

- **Assisted Households (Sections I to III and VI to VII)**
  - Households where a client received LIHEAP assistance using **federal LIHEAP funds during the federal fiscal year** (October 1 to September 30).
  - Report on households, not total persons or the head of household.
  - Do not count “approved” households that did not receive assistance.
- **Applicant Households (Section IV and V)**
  - Households where a client applied for LIHEAP assistance during **the federal fiscal year** (October 1 to September 30).
  - The definition of “applicant” is not defined by the LIHEAP statute. Grantees should report applicant households according to their definitions.

# Key Concepts for Reporting *Counts of Households, Not Counts of Benefits*

- For the Household Report, you are always reporting households, not individual benefits.
- **For each line of the report, a household is only counted once in that line.**
  - Example: The Johnson household received two year-round crisis benefits (one in the winter, one the spring). While they received two benefits, they are one household and should be counted once when reporting the count of households that year-round crisis assistance.
- **Households should be reported for each applicable type of assistance they receive (i.e., reported in each applicable line).**
  - Example: The Lee household received one heating benefit and one cooling benefit. Report the Lee household under both the applicable “heating assistance” lines and under “cooling assistance” lines.

# Key Concepts for Reporting

## Reporting “Any Type of Assistance” and “Bill Payment Assistance”

- The Household Report requires grantees to report an unduplicated count across different categories of assistance.
- Bill Payment Assistance** = Report the count of households that received at least one benefit used to pay a share of the household’s energy bills and utility deposits. This does not include assistance for weatherization or equipment assistance.
- Any Type of Assistance** = Report the total count of households that received any LIHEAP assistance, including bill payment assistance, weatherization, or equipment assistance.

**Example with three households that received assistance:**

Household Scenarios	Number of Assisted Households by Type of LIHEAP Assistance		
	Heating	Cooling	Wxz.
Household A receives a heating benefit	1	0	0
Household B receives a heating benefit and a cooling benefit	1	1	0
Household C receives weatherization	0	0	1
Any Type of Assistance	3		
Bill Payment Assistance	2		

# General Reporting Reminders



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# Reminder #1:

## *Reporting for Each Type of Assistance*

- Report households that received assistance during the Federal Fiscal Year 2021 (October 1, 2020 to September 30, 2021). This includes households served with prior year funds.
- If a grantee indicated that it planned to provide a particular type of assistance in their FY 2021 Model Plan, we would expect to see households reported under that type of assistance in their FY 2021 Household Report.
- In Section II, we would expect grantees to only report households that fall within the gross income thresholds specified in their Model Plans.
- **REMINDER:** Grantees should assign each household to a poverty interval using the 2020 HHS Poverty Guidelines. They are available here:
  - <https://www.acf.hhs.gov/ocs/policy-guidance/liheap-im-2020-01-hhs-poverty-guidelines-optional-use-ffy-2020-and-mandatory>

# Reminder #2:

## *Collecting and Matching Data from Program Partners*

- Some grantees may not directly capture information for Crisis or Weatherization Assistance in their primary LIHEAP data tracking systems.
  - Examples:
    - Your Weatherization Department administers your LIHEAP Weatherization component.
    - A subgrantee administers an emergency equipment program.
- **In this situation, Grantees need to obtain household-level data from their subgrantees or program partners who record this information.**
- Household-level data is needed to confirm an accurate count of households that received “Any Type of LIHEAP Assistance” by matching households that received Crisis/Weatherization Assistance to households that received other types of LIHEAP assistance.
- Please contact APPRISE if you need assistance with this.

# Reminder #3:

## Reporting “Any Type of Vulnerability”

- In Section III, Column D, “Elderly, Disabled, or Young Child”, grantees must report an unduplicated count for each type of assistance with **at least one vulnerable member**.


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. Heating (CARES Act funding only)				
3. Heating (American Rescue Plan Act funding)				
4. Cooling				
5. Cooling (CARES Act funding only)				
6. Cooling (American Rescue Plan Act funding)				

- A household with multiple vulnerabilities should only be counted once under each column.
- You should NOT add across the Elderly + Disabled + Young Child columns, because households can have more than one type of vulnerability. This count should be *less than* the sum of elderly, disabled, and young child households in each row/type of assistance.

## Reminder #4: *Include Notes to Explain Reporting*

- The Household Report includes a **Notes section**.
- If you receive a Warning message in OLDC, you can explain the issue in a note.
- Notes are reviewed and provide useful context. Please do not hesitate to leave notes to explain information that is out of the ordinary or to provide clarification.
- Notes allow for an accurate understanding of the reported data, and OCS uses information from these notes in the Report to Congress.

8. Weatherization			
9. Weatherization (CARES Act funding only)			
10. Weatherization (American Rescue Plan Act funding)			
Notes			
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# Reporting Guidance for Supplemental Funding



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# Reporting Guidance for Each Type of Assistance Overview

I. Number of Assisted Households		
Number of assisted households		
Type of LIHEAP assistance	A. Select if estimated data	B. Total Number of Households
1. Heating	<input type="checkbox"/>	<input type="text"/>
2. Heating (CARES Act funding only)	<input type="checkbox"/>	<input type="text"/>
3. Heating (American Rescue Plan Act funding)	<input type="checkbox"/>	<input type="text"/>

- **First Line** - Submit data on *total households regardless of funding source*. This is consistent with what grantees were required to report in the past.
- **Second Line** - Submit data on *the subset of households that were assisted with LIHEAP CARES Act funding.*
- **Third Line** - Submit data on *the subset of households that were assisted with LIHEAP ARPA funding.* This is new for FY 2021 reporting.

# Reporting Guidance for Each Type of Assistance

## *First Line for Each Assistance Type*

### I. Number of Assisted Households

Number of assisted households		
Type of LIHEAP assistance	A. Select if estimated data	B. Total Number of Households
1. Heating	<input type="checkbox"/>	<input type="text"/>
2. Heating (CARES Act funding only)	<input type="checkbox"/>	<input type="text"/>
3. Heating (American Rescue Plan Act funding)	<input type="checkbox"/>	<input type="text"/>

- The first line under each type of assistance is used to report total households that received that type of assistance from any federal LIHEAP funds.
    - **Include** all households that received this type of assistance with federal funds. This includes households assisted with regular funds, CARES funds, or ARPA funds, or a mixture of those funds.
    - **Note:** The federal funding type used does not matter for this line.
- **Key Point:** This is consistent with what grantees were required to report in the past (counting all households assisted with federal LIHEAP funds).

# Reporting Guidance for Each Type of Assistance

## *Second Line for Each Assistance Type*

### I. Number of Assisted Households

Number of assisted households		
Type of LIHEAP assistance	A. Select if estimated data	B. Total Number of Households
1. Heating	<input type="checkbox"/>	<input type="text"/>
2. Heating (CARES Act funding only)	<input type="checkbox"/>	<input type="text"/>
3. Heating (American Rescue Plan Act funding)	<input type="checkbox"/>	<input type="text"/>

- The second line under each type of assistance is the subset of households that received that assistance from LIHEAP CARES Act funds.
  - Include** households who received a benefit for that particular type of assistance that was fully **or** partially funded with LIHEAP CARES Act funds.
  - Exclude** households whose benefit for that type of assistance was paid without any LIHEAP CARES Act funds (e.g. only regular LIHEAP funds or LIHEAP ARPA funds were used to provide that assistance to the household).
- Key Point:** The same households reported here need to be included in the first line as well. The second line is a subset of households in the first line.

Presenter(s):  
Dan Bausch

# Reporting Guidance for Each Type of Assistance

## *Third Line for Each Assistance Type*

### I. Number of Assisted Households

Number of assisted households		
Type of LIHEAP assistance	A. Select if estimated data	B. Total Number of Households
1. Heating	<input type="checkbox"/>	<input type="text"/>
2. Heating (CARES Act funding only)	<input type="checkbox"/>	<input type="text"/>
3. Heating (American Rescue Plan Act funding)	<input type="checkbox"/>	<input type="text"/>

- The third line under each type of assistance is the subset of households that received that assistance from LIHEAP ARPA funds.
  - **Include** households who received a benefit for that particular type of assistance that was fully **or** partially funded with LIHEAP CARES Act funds.
  - **Exclude** households whose benefit was paid without any LIHEAP ARPA funds (e.g. only regular LIHEAP funds or LIHEAP CARES funds were used to provide the assistance to the household).
- **Key Point:** The same households reported here need to be included in the first line as well. The third line is a subset of households in the first line.

# New LIHEAP ARP Act Reporting Requirements *Relationship of Lines*

I. Number of Assisted Households		
<u>Number of assisted households</u>		
<u>Type of LIHEAP assistance</u>	<u>A. Select if estimated data</u>	<u>B. Total Number of Households</u>
1. Heating	<input type="checkbox"/>	<input type="text"/>
2. Heating (CARES Act funding only)	<input type="checkbox"/>	<input type="text"/>
3. Heating (American Rescue Plan Act funding)	<input type="checkbox"/>	<input type="text"/>

- The household counts in the first line should be...
  - Greater than or equal to the counts reported in Line 2.
  - Greater than or equal to the counts reported in Line 3.
- If you combined CARES and ARPA funds to provide a type of assistance to households, the household should be reported in all three lines.
- We will review examples later in the presentation.

# Reporting Guidance for Each Type of Assistance

## *Grantee Uses of Supplement Funds*

- Grantees could have used CARES or ARPA funds during FY 2021 to provide households with assistance in several ways, including:
  1. Providing extra supplemental benefits to households who already received benefits for that assistance from regular LIHEAP funds or other supplemental funds (i.e., increasing the benefit level provided to recipient households)
  2. Serving more households by providing additional households with an existing type of assistance (i.e., serving more eligible households with a particular type of assistance)
  3. Furnishing new assistance that was not previously offered (i.e., creating a new program component)

# Reporting Guidance for Each Type of Assistance

## *Identifying LIHEAP ARPA Households*

### Assisted Households (Applicable to Sections I, II, III, and VI)

- If a grantee expended any LIHEAP ARPA funds to provide households with benefits during FFY 2021 for a type of assistance, the grantee needs to count and report those households.
  - This should include the households that received a benefit that was fully or partially funded with ARP Act funds.
- If a grantee did not expend any of their LIHEAP ARPA funds to provide benefits during FFY 2021 for a type of assistance, the total number reported should be zero.

# Reporting Guidance for Each Type of Assistance

## *Identifying LIHEAP ARPA Households*

### Applicant Households (Applicable to Sections IV and V)

- If a grantee expended any LIHEAP ARPA funds to provide households with benefits during FFY 2021 for a type of assistance, you need to count and report the number of LIHEAP ARPA applicant households.
- Grantees can use different approaches to report this:
  - ❖ If a grantee had a separate application form or process for a household to apply to receive an ARPA-funded benefit, grantees can report the number of households that used that form or process.
  - ❖ If a grantee did not have a distinct application form or process to apply to receive an ARPA-funded benefit, the grantee can:
    - Report the total number of households that applied for that type of assistance, repeating the information reported for the first line; or
    - Report the number of households that applied for that type of assistance after it began issuing ARPA-funded benefits.

# Scenario #1

## Grantee X Provides Supplemental Benefits



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# Scenario #1

## *Grantee X Provides Supplemental Benefits*

### Heating Assistance

- Grantee X provided 5,000 households with Heating Assistance using their regular LIHEAP funds.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	
2. Heating (CARES Act funding only)	
3. Heating (American Rescue Plan Act funding)	
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	
c. Year Round (American Rescue Plan Act funding)	
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	
10. Weatherization (American Rescue Plan Act funding)	
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	

# Scenario #1

## Grantee X Provides Supplemental Benefits

### Heating Assistance

- ❑ Grantee X provided 5,000 households with Heating Assistance using their regular LIHEAP funds.
- ❑ When the LIHEAP ARP Act funds were issued, Grantee X decided to use those funds to provide all 5,000 households that got Heating Assistance with a supplemental ARP Act Heating Assistance benefit.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	
2. Heating (CARES Act funding only)	
3. Heating (American Rescue Plan Act funding)	5,000
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	
c. Year Round (American Rescue Plan Act funding)	
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	
10. Weatherization (American Rescue Plan Act funding)	
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	

# Scenario #1

## Grantee X Provides Supplemental Benefits

### Heating Assistance

- ❑ Grantee X provided 5,000 households with Heating Assistance using their regular LIHEAP funds.
- ❑ When the LIHEAP ARP Act funds were issued, Grantee X decided to use those funds to provide all 5,000 households that got Heating Assistance with a supplemental ARP Act Heating Assistance benefit.
- ❑ Grantee X also carried some of their CARES Act LIHEAP allotment over to FY 2021. They decided to use those funds to provide a *second* supplemental payment to the 500 households with highest pre-LIHEAP energy burdens

I. Number of Assisted Households	B. Total Number of Households
1. Heating	
2. Heating (CARES Act funding only)	500
3. Heating (American Rescue Plan Act funding)	5,000
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	
c. Year Round (American Rescue Plan Act funding)	
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	
10. Weatherization (American Rescue Plan Act funding)	
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	

# Scenario #1

## Grantee X Provides Supplemental Benefits

### Heating Assistance

- ❑ Grantee X provided 5,000 households with Heating Assistance using their regular LIHEAP funds.
- ❑ When the LIHEAP ARP Act funds were issued, Grantee X decided to use those funds to provide all 5,000 households that got Heating Assistance with a supplemental ARP Act Heating Assistance benefit.
- ❑ Grantee X also carried some of their CARES Act LIHEAP allotment over to FY 2021. They decided to use those funds to provide a *second* supplemental payment to the 500 households with highest pre-LIHEAP energy burdens
- ❑ Because the supplemental benefits were offered *in addition to* the regular LIHEAP benefit for each household, the unduplicated count of households receiving heating assistance is 5,000.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	5,000
2. Heating (CARES Act funding only)	500
3. Heating (American Rescue Plan Act funding)	5,000
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	
c. Year Round (American Rescue Plan Act funding)	
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	
10. Weatherization (American Rescue Plan Act funding)	
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	

# Scenario #1

## Grantee X Provides Supplemental Benefits

### Crisis & Weatherization

- ❑ Grantee X did not issue any Crisis or Weatherization Assistance using CARES or ARPA funds.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	5,000
2. Heating (CARES Act funding only)	500
3. Heating (American Rescue Plan Act funding)	5,000
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	

# Scenario #1

## Grantee X Provides Supplemental Benefits

### Crisis & Weatherization

- ❑ Grantee X did not issue any Crisis or Weatherization Assistance using CARES or ARPA funds.
- ❑ However, they did serve 2,000 households with Crisis Assistance and 500 households with Weatherization assistance using regular LIHEAP funds. So, we can fill in Lines 7a and 8 accordingly.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	5,000
2. Heating (CARES Act funding only)	500
3. Heating (American Rescue Plan Act funding)	5,000
7. Crisis	
a. Year Round	2,000
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	500
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	

# Scenario #1

## *Grantee X Provides Supplemental Benefits*

### Any Type of Assistance

- ❑ After de-duplicating households that received Heating Assistance, Crisis Assistance, and Weatherization Assistance, Grantee X indicates that 6,000 households received ANY Type of Assistance.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	5,000
2. Heating (CARES Act funding only)	500
3. Heating (American Rescue Plan Act funding)	5,000
7. Crisis	
a. Year Round	2,000
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	500
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	6,000
12. Any type of LIHEAP assistance (CARES Act funding only)	500
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	5,000

# Scenario #1

## Grantee X Provides Supplemental Benefits

### Any Type of Assistance

- ❑ After de-duplicating households that received Heating Assistance, Crisis Assistance, and Weatherization Assistance, Grantee X indicates that 6,000 households received ANY Type of Assistance.
- ❑ However, since ARPA and CARES funds were only used to provide supplemental benefits, and were not used for Crisis or Weatherization, we know the counts on Lines 12 and Line 13 should match Line 2 and Line 3 respectively.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	5,000
2. Heating (CARES Act funding only)	500
3. Heating (American Rescue Plan Act funding)	5,000
7. Crisis	
a. Year Round	2,000
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	500
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	6,000
12. Any type of LIHEAP assistance (CARES Act funding only)	500
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	5,000

# Scenario #2

## *Grantee Y Serves New Households*



ADMINISTRATION FOR  
**CHILDREN & FAMILIES**

# Scenario #2

## Grantee Y Serves New Households

### Heating Assistance

- ❑ Like Grantee X, Grantee Y also provided 5,000 households with Heating Assistance using their regular LIHEAP funds.
- ❑ However, Grantee Y decided to use their CARES and ARPA funds to provide additional households with Heating Assistance.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	
2. Heating (CARES Act funding only)	
3. Heating (American Rescue Plan Act funding)	
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	
c. Year Round (American Rescue Plan Act funding)	
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	
10. Weatherization (American Rescue Plan Act funding)	
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	

# Scenario #2

## Grantee Y Serves New Households

### Heating Assistance

- ❑ Like Grantee X, Grantee Y also provided 5,000 households with Heating Assistance using their regular LIHEAP funds.
- ❑ However, Grantee Y decided to use their CARES and ARPA funds to provide additional households with Heating Assistance.
- ❑ 3,000 new households received Heating Assistance from the LIHEAP CARES funds and;

I. Number of Assisted Households	B. Total Number of Households
1. Heating	
2. Heating (CARES Act funding only)	3,000
3. Heating (American Rescue Plan Act funding)	
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	
c. Year Round (American Rescue Plan Act funding)	
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	
10. Weatherization (American Rescue Plan Act funding)	
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	

# Scenario #2

## Grantee Y Serves New Households

### Heating Assistance

- ❑ Like Grantee X, Grantee Y also provided 5,000 households with Heating Assistance using their regular LIHEAP funds.
- ❑ However, Grantee Y decided to use their CARES and ARPA funds to provide additional households with Heating Assistance.
- ❑ 3,000 new households received Heating Assistance from the LIHEAP CARES funds and;
- ❑ 2,000 new households received Heating Assistance from the ARP Act funds.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	
2. Heating (CARES Act funding only)	3,000
3. Heating (American Rescue Plan Act funding)	2,000
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	
c. Year Round (American Rescue Plan Act funding)	
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	
10. Weatherization (American Rescue Plan Act funding)	
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	

# Scenario #2

## Grantee Y Serves New Households

### Heating Assistance

- ❑ Like Grantee X, Grantee Y also provided 5,000 households with Heating Assistance using their regular LIHEAP funds.
- ❑ However, Grantee Y decided to use their CARES and ARPA funds to provide additional households with Heating Assistance.
  - ❑ 3,000 new households received Heating Assistance from the LIHEAP CARES funds and;
  - ❑ 2,000 new households received Heating Assistance from the ARP Act funds.
- ❑ Because the households served with each of type of funds are mutually exclusive groups, we see that the total number of households served with heating assistance is 10,000.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	10,000
2. Heating (CARES Act funding only)	3,000
3. Heating (American Rescue Plan Act funding)	2,000
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	
c. Year Round (American Rescue Plan Act funding)	
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	
10. Weatherization (American Rescue Plan Act funding)	
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	

# Scenario #2

## Grantee Y Serves New Households

### Crisis & Weatherization

- Like Grantee X, Grantee Y did not issue any Crisis or Weatherization Assistance using CARES or ARPA funds.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	10,000
2. Heating (CARES Act funding only)	3,000
3. Heating (American Rescue Plan Act funding)	2,000
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	

# Scenario #2

## Grantee Y Serves New Households

### Crisis & Weatherization

- ❑ Like Grantee X, Grantee Y did not issue any Crisis or Weatherization Assistance using CARES or ARPA funds.
- ❑ However, they did serve 2,000 households with Crisis Assistance and 500 households with Weatherization assistance using regular LIHEAP funds. So, we can fill in Lines 7a and 8 accordingly.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	10,000
2. Heating (CARES Act funding only)	3,000
3. Heating (American Rescue Plan Act funding)	2,000
7. Crisis	
a. Year Round	2,000
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	500
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	

# Scenario #2

## Grantee Y Serves New Households

### Any Type of Assistance

- ❑ After de-duplicating households that received Heating Assistance, Crisis Assistance, and Weatherization Assistance, Grantee X indicates that 10,500 households received ANY Type of Assistance.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	10,000
2. Heating (CARES Act funding only)	3,000
3. Heating (American Rescue Plan Act funding)	2,000
7. Crisis	
a. Year Round	2,000
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	500
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	10,500
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	

# Scenario #2

## Grantee Y Serves New Households

### Any Type of Assistance

- ❑ After de-duplicating households that received Heating Assistance, Crisis Assistance, and Weatherization Assistance, Grantee Y indicates that 10,500 households received ANY Type of Assistance.
- ❑ However, since ARPA and CARES funds were only used to provide heating benefits, and were not used for Crisis or Weatherization, we know the counts on lines 12 and 13 should match Lines 2 and Line 3 respectively.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	10,000
2. Heating (CARES Act funding only)	3,000
3. Heating (American Rescue Plan Act funding)	2,000
7. Crisis	
a. Year Round	2,000
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. _____	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	500
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	10,500
12. Any type of LIHEAP assistance (CARES Act funding only)	3,000
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	2,000

# **Scenario #3**

## ***Grantee Z Offers New Assistance Component***



ADMINISTRATION FOR  
**CHILDREN & FAMILIES**

# Scenario #3

## Grantee Z Offers New Assistance Component

### Heating Assistance

- Unlike the previous two examples, Grantee Z decided to carry all their ARPA funds over to FY 2022. So, all ARPA lines can be left blank or entered as 0.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	
2. Heating (CARES Act funding only)	
3. Heating (American Rescue Plan Act funding)	0
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	
c. Year Round (American Rescue Plan Act funding)	0
m. <u>COVID CRISIS PROGRAM</u>	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	0
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	0

# Scenario #3

## Grantee Z Offers New Assistance Component

### Heating Assistance

- ❑ Unlike the previous two examples, Grantee Z decided to carry all their ARPA funds over to FY 2020. So, all ARPA lines can be left blank or entered as 0.
- ❑ Grantee Z also did NOT use their CARES funds to provide standard Heating Assistance. So, Line 2 is also 0.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	
2. Heating (CARES Act funding only)	0
3. Heating (American Rescue Plan Act funding)	0
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	
c. Year Round (American Rescue Plan Act funding)	0
m. <u>COVID CRISIS PROGRAM</u>	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	0
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	0

# Scenario #3

## Grantee Z Offers New Assistance Component

### Heating Assistance

- ❑ Unlike the previous two examples, Grantee Z decided to carry all their ARPA funds over to FY 2022. So, all ARPA lines can be left blank or entered as 0.
- ❑ Grantee Z also did NOT use their CARES funds to provide standard Heating Assistance. So, Line 2 is also 0.
- ❑ Grantee Z provided all standard Heating Assistance with regular LIHEAP funds only. They served 7,000 households with Heating Assistance, so we know that Line 1 should be 7,000.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	7,000
2. Heating (CARES Act funding only)	0
3. Heating (American Rescue Plan Act funding)	0
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	
c. Year Round (American Rescue Plan Act funding)	0
m. <u>COVID CRISIS PROGRAM</u>	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	0
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	0

# Scenario #3

## Grantee Z Offers New Assistance Component

### Crisis & Weatherization

- Grantee Z did NOT use CARES or ARPA funds to provide Year-Round Crisis or Weatherization.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	7,000
2. Heating (CARES Act funding only)	0
3. Heating (American Rescue Plan Act funding)	0
7. Crisis	
a. Year Round	
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. <u>COVID Crisis Program</u>	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	0

# Scenario #3

## Grantee Z Offers New Assistance Component

### Crisis & Weatherization

- ❑ Grantee Z did NOT use CARES or ARPA funds to provide Year-Round Crisis or Weatherization.
- ❑ However, they did serve 3,000 households with Crisis Assistance and 500 households with Weatherization assistance using regular LIHEAP funds. So, we can fill in Lines 7a and 8 accordingly.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	7,000
2. Heating (CARES Act funding only)	0
3. Heating (American Rescue Plan Act funding)	0
7. Crisis	
a. Year Round	3,000
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. <u>COVID Crisis Program</u>	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	500
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	0

# Scenario #3

## Grantee Z Offers New Assistance Component

### Crisis & Weatherization

- ❑ Grantee Z did NOT use CARES or ARPA funds to provide Year-Round Crisis or Weatherization.
- ❑ However, they did serve 3,000 households with Crisis Assistance and 500 households with Weatherization assistance using regular LIHEAP funds. So, we can fill in Lines 7a and 8 accordingly.
- ❑ Additionally, Grantee Z used their CARES Funds to create and provide a new Crisis Assistance component in FY 2021 – **COVID Crisis Program**

I. Number of Assisted Households	B. Total Number of Households
1. Heating	7,000
2. Heating (CARES Act funding only)	0
3. Heating (American Rescue Plan Act funding)	0
7. Crisis	
a. Year Round	3,000
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. <u>COVID Crisis Program</u>	
n. (CARES Act funding only)	
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	500
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	0

# Scenario #3

## Grantee Z Offers New Assistance Component

### Crisis & Weatherization

- ❑ Grantee Z did NOT use CARES or ARPA funds to provide Year-Round Crisis or Weatherization.
- ❑ However, they did serve 3,000 households with Crisis Assistance and 500 households with Weatherization assistance using regular LIHEAP funds. So, we can fill in Lines 7a and 8 accordingly.
- ❑ Additionally, Grantee Z used their CARES Funds to create and provide a new Crisis Assistance component in FY 2021 – **COVID Crisis Program**
- ❑ The **COVID Crisis Program** was only funded by CARES and only available to households that had already received a regular heating benefit. 1,000 household were ultimately served with this assistance. So, 7m and 7n are both 1,000.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	7,000
2. Heating (CARES Act funding only)	0
3. Heating (American Rescue Plan Act funding)	0
7. Crisis	
a. Year Round	3,000
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. <u>COVID Crisis Program</u>	1,000
n. (CARES Act funding only)	1,000
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	500
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	0

# Scenario #3

## Grantee Z Offers New Assistance Component

### Any Type of Assistance

- ❑ In order to receive any crisis or weatherization benefit from Grantee Z, a household must first have received a standard heating benefit. Thus, the number of households that received ANY Type of Assistance (Line 11) should match Line 1 at 7,000.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	7,000
2. Heating (CARES Act funding only)	0
3. Heating (American Rescue Plan Act funding)	0
7. Crisis	
a. Year Round	3,000
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. <u>COVID Crisis Program</u>	1,000
n. (CARES Act funding only)	1,000
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	500
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	7,000
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	0

# Scenario #3

## Grantee Z Offers New Assistance Component

### Any Type of Assistance

- ❑ In order to receive any crisis or weatherization benefit from Grantee Z, a household must first have received a standard heating benefit. Thus, the number of households that received ANY Type of Assistance (Line 11) should match Line 1 at 7,000.
- ❑ Since ARPA funds were all carried over to FY 2022, Line 13 remains 0.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	7,000
2. Heating (CARES Act funding only)	0
3. Heating (American Rescue Plan Act funding)	0
7. Crisis	
a. Year Round	3,000
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. <u>COVID Crisis Program</u>	1,000
n. (CARES Act funding only)	1,000
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	500
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	7,000
12. Any type of LIHEAP assistance (CARES Act funding only)	
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	0

# Scenario #3

## Grantee Z Offers New Assistance Component

### Any Type of Assistance

- ❑ In order to receive any crisis or weatherization benefit from Grantee Z, a household must first have received a standard heating benefit. Thus, the number of households that received ANY Type of Assistance (Line 11) should match Line 1 at 7,000.
- ❑ Since ARPA funds were all carried over to FY 2022, Line 13 remains 0.
- ❑ Since CARES were only used for the new **COVID Crisis Program** in FY 2021, Line 12 matches lines 7m and 7n at 1,000.

I. Number of Assisted Households	B. Total Number of Households
1. Heating	7,000
2. Heating (CARES Act funding only)	0
3. Heating (American Rescue Plan Act funding)	0
7. Crisis	
a. Year Round	3,000
b. Year Round (CARES Act funding only)	0
c. Year Round (American Rescue Plan Act funding)	0
m. <u>COVID Crisis Program</u>	1,000
n. (CARES Act funding only)	1,000
o. (American Rescue Plan Act funding)	
p. _____	
8. Weatherization	500
9. Weatherization (CARES Act funding only)	0
10. Weatherization (American Rescue Plan Act funding)	0
11. Any type of LIHEAP assistance	7,000
12. Any type of LIHEAP assistance (CARES Act funding only)	1,000
13. Any type of LIHEAP assistance (American Rescue Plan Act funding)	0

# Reporting Guidance for Each Type of Assistance

## *Recommendations for IT Staff*

- Confirm that you have fields to identify each type of benefit a household received and the type of funds used to provide that benefit.
- Check that your results agree with other information you know about how funds were used during FY 2021.
- **Example Approach**
  - Generate the statistics for all households – these are the figures for the first line of each assistance type.
  - Generate the same statistics for only the subset that received CARES to fill in the second lines (i.e., filter to only those marked as receiving CARES).
  - Generate the same statistics for only the subset that received ARPA to fill in the third lines (i.e., filter to only those marked as receiving ARPA).

# Report Versions, Submitting the Report in OLDC, and Final Reminders



ADMINISTRATION FOR  
**CHILDREN & FAMILIES**

# Report Versions

## *Preliminary and Final Reports*

- **Preliminary Report – due Friday, November 5, 2021**
  - This is the report grantees normally submit with their Model Plan.
  - Your preliminary Household Report may contain non-final or estimated data.
- **Final Report – due Friday, December 31, 2021**
  - The final Household Report must contain final data 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.
  - Grantees may submit revisions to their reports later if corrections are needed.

# Data Validations and Checks

## 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.

# Submission Process

- To complete this reporting requirement, you need to **submit** your form in the OLDC System.
- To submit the form, first enter and save your report. When ready, **validate** it. Once the form is valid and correct, **certify and submit**.

Save ➡ Validate ➡ Certify ➡ Submit

The screenshot shows the 'Report Form Status' page in the OLDC system. At the top, there is a navigation bar with links: OLDC Home, Form Selection, Report, and Report Form Status. Below this, a box displays the following information: Program Name: Low Income Home Energy Assistance, Grantee Name: [REDACTED], Report Name: Household Report - Long Form, Report Period: 10/01/2020 - 09/30/2021, and Report Status: Initialized. Below this box is a 'Report Progress' section with a horizontal timeline showing seven stages: Initialized (with a green checkmark), Edit-Saved, Validated, Certified, Submitted, In Review, and C/O Approved. At the bottom of the page, there is a red-bordered box containing four buttons: Save, View/Add Attachments, Validate, and Print.

- The individuals who have permission to certify and submit may vary based on how you initially set up your OLDC account, but the user with the role "**Grant Administrator**" may perform all actions by default.

# Final Reminders

## *Household Report Changes*

- There are no changes to the form structure or sections for the FY 2021 Household Report.
- For each type of assistance, grantees still report on total households (first line) and the subset of households that were assisted with CARES Act funds (second line).
- **The only change from last year's FY 2020 report is that grantees must now report information on the subset of households that were assisted with LIHEAP ARPA funds during FY 2021 for each type of assistance (third line).**
- To complete the final report, grantees need to use their data reporting systems to identify households that received any LIHEAP ARP Act funds.
- Grantees facing challenges with understanding the reporting requirements should contact APPRISE.

# Final Reminders

## *Due Dates, Submission, Validation*

- The preliminary report with estimated data is due **Friday, November 5, 2021**.
- The final Household Report is due in OLDC on **Friday, December 31, 2021**.
- Remember that the Household Report must be:
  - Entered in OLDC
  - Saved in OLDC
  - Certified by the appropriate person
  - Submitted by the appropriate person
- The Household Report does include validation checks in OLDC. If you receive any messages that you are unsure about or which prevent you from submitting your report, please contact APPRISE.

# 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](mailto:help@grantsolutions.gov)

# Final Reminders

## *Household Report Resources*

- **2020 HHS Poverty Guidelines to use for Assigning Households to Poverty Intervals:**
  - ❑ <https://www.acf.hhs.gov/ocs/policy-guidance/liheap-im-2020-01-hhs-poverty-guidelines-optional-use-ffy-2020-and-mandatory>
- **Household Report AT and Instructions:**
  - ❑ <https://www.acf.hhs.gov/ocs/policy-guidance/liheap-2021-05-household-report-fy2021>
- **“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](https://liheappm.acf.hhs.gov/sites/default/files/private/grantee_tools/best_practices/Household-Report-Check-Before-You-Submit-Document.pdf)
- **Required Reports Support on the LIHEAP PMW:**
  - ❑ <https://liheappm.acf.hhs.gov/required-reports/>

# Audience Poll Question #2

QUICKPOLL

**How confident are you that you understand how to correctly complete the FY 2021 Household Report?**

Please select one:

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



# Final Reminders

## *Additional Household Report Training*

- FY 2021 Household Report – Step-by-Step Overview Webinar
  - A second webinar will take place on November 30<sup>th</sup>, 2021 at 3 PM ET.
  - This webinar will provide a detailed review of the report for new Coordinators or staff.
  - The registration link is:  
<https://attendee.gotowebinar.com/register/4089032485303652111>
  - Registration information for this upcoming webinar will be emailed shortly.

# Final Reminders

## *Support Resources*

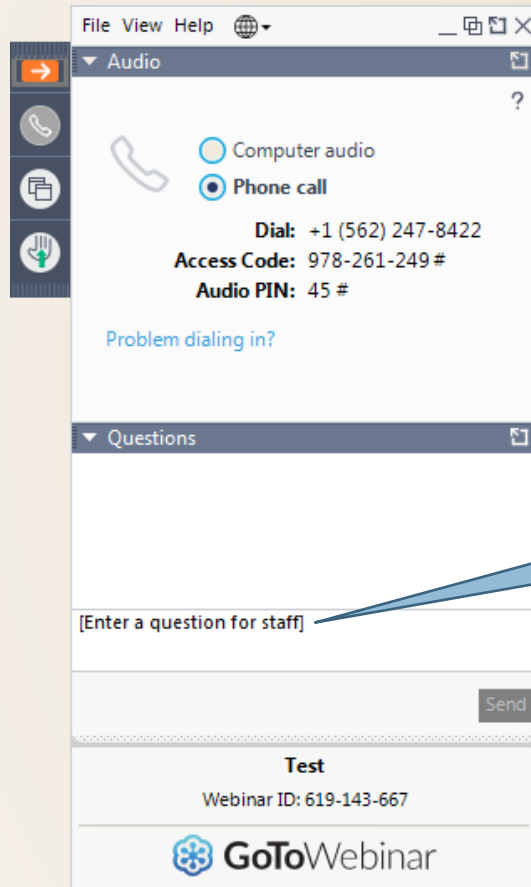
### OCS liaisons

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

### APPRISE Team

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