

Completing the *FY 2023 Household Report:* Long Form Version

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

October 25, 2023

Welcome:

Megan Meadows (OCS)

Presenters:

Melissa Torgerson (Verve Associates)

Dan Bausch (APPRISE)



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Webinar Overview

- **Purpose of this Webinar**

- To review the key requirements for completing the *FY 2023 Household Report – Long Form*.
- To explain changes made to the report for FY 2023.
- To review the data you need to prepare the report.
- To review the process for submitting and updating the report.

- **Audience for this Webinar**

- LIHEAP Coordinators (States and applicable Territories that complete the Long Form).
- Staff and contractors that assist with completing the report.

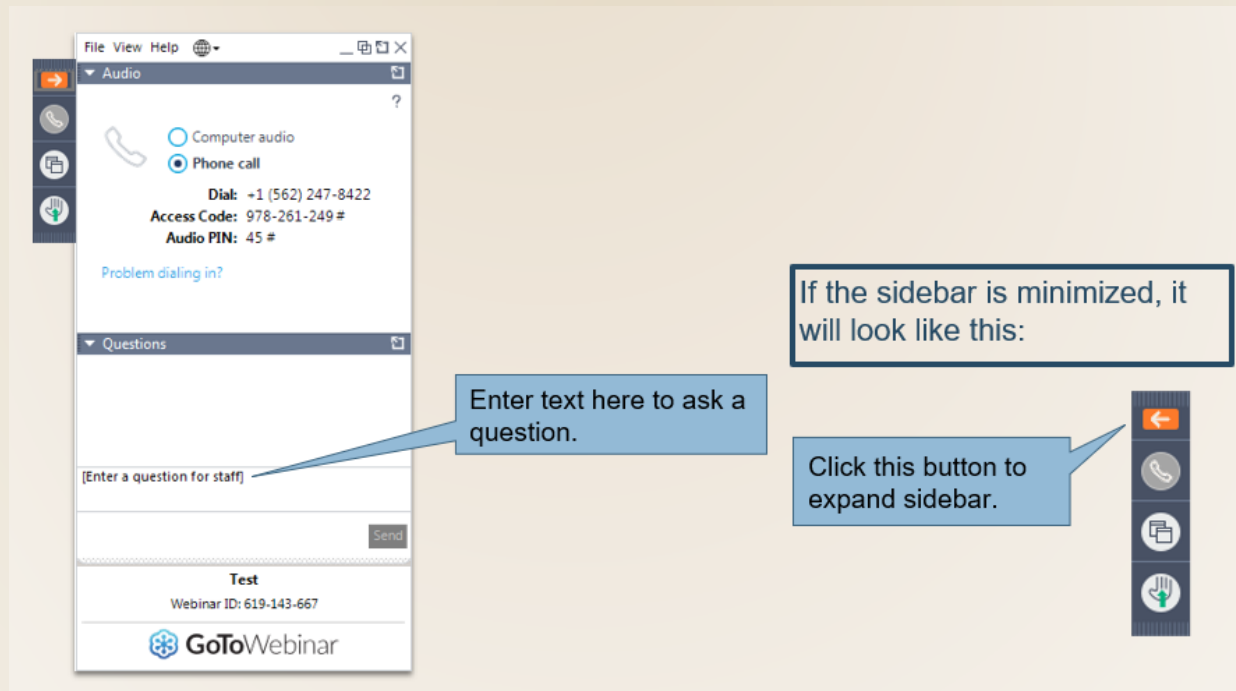
- **NOTE:** Today's webinar will be repeated on December 5th (Registration Pending)

Webinar Overview

- **Structure of the Webinar**
 - 60-minutes.
 - **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.
 - Handouts includes key resources for you.

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.



Presenter(s):
Melissa Torgerson

Presentation Outline

- | | | |
|----|---|-----------------|
| 1. | Reporting Overview | Slide 7 |
| 2. | What's New for FY 2023 Reporting | Slide 9 |
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| 4. | Steps to Take Now to Prepare to Submit the Report by December | Slide 20 |
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Audience Poll Question #1

QUICKPOLL

How prepared do you think your team is for completing the *FY 2023 LIHEAP Household Report – Long Form*?

Please select one:

- **Not at all prepared** (i.e. haven't turned attention to this)
- **A little prepared** (i.e. aware, but haven't planned yet)
- **Mostly prepared** (i.e. planning and working out nuances)
- **Very prepared** (i.e. working on it and understand it)

LIHEAP Federal Reports

Upcoming Schedule

Report	Due Date	Focus of Report
Model Plan (FY 2024)	09/1/2023	Application and plans for the fiscal year
Quarterly Report (Quarter 4 of FY 2023)	10/31/2023 (Quarter 4)	Summary of activity in the last quarter
Household Report (FY 2023)	12/15/2023	Households Served in past fiscal year
Carryover & Reallotment Report (FY 2023)	09/29/2023 (Estimated) 12/29/2023 (Final)	Funds being carried over or returned
SF-425	12/31/2023	Federal financial reporting
Performance Data Form (FY 2023): Module 1 – Grantee Survey	1/31/2024	Sources/Uses of Funds , Average Benefits, Maximum Income Cutoffs
Performance Data Form (FY 2023): Module 2 – Performance Measures	1/31/2024	Energy Burden Data, Restoration/Prevention Data

Presenter(s):
Dan Bausch

Overview of the Household Report

History & Purpose

- The *Household Report* has been submitted by grant recipients since the 1980s. States and applicable territories complete the Long Form and tribal recipients complete a Short Form version.
- Three main types of data need to be reported:
 1. Count of households that received each type of LIHEAP assistance.
 2. Count of total households served (Any Type of LIHEAP assistance).
 3. Demographic information on who is served.
- Data are...
 - Used to communicate to the public about LIHEAP.
 - Used to respond to Congressional and White House inquiries.
 - Published in the annual LIHEAP Report to Congress.
 - Published in the [LIHEAP Data Warehouse](#).

In FY 2022, state grant recipients assisted **6.07 million** households with LIHEAP. This figure comes directly from data reported in the *Household Report – Long Form*.

What's New for FY 2023 Reporting



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What's New for FY 2023 Reporting

Report Announcements and Due Date

- **Report Announcement** - On June 9th, 2023, OCS published an Action Transmittal with the instructions and due date for the FY 2023 report (the AT and instructions are included as handouts).
- **Due Date** - Final data is due December 15.
- **Report Availability** – OCS will be making the report available in OLDC in the coming weeks.
- **Submission** – The report must be submitted in OLDC and must be validated and certified by the designated authorized official.

What's New for FY 2023 Reporting

Report Changes

The report has two main changes from the past.

Change 1 – **The report no longer collects the count of applicants for each type of assistance.** It only collects data for recipient households and members who received LIHEAP during the fiscal year.

- *Rationale:* This data was not being used because grant recipients have varying definitions of “applicant households”, making the data challenging to interpret.

Change 2 – **The report now includes new demographic items on assisted households, including tenure (own/rent, race, ethnicity, and gender).** Some of the new items are required for FY 2023, and some are optional until FY 2024 reporting.

- *Rationale:* Household demographic information, along with information on income levels and owner/renter status, will be critical for assessing the success of efforts to conduct outreach and distribute resources equitably.

Presenter(s):
Dan Bausch

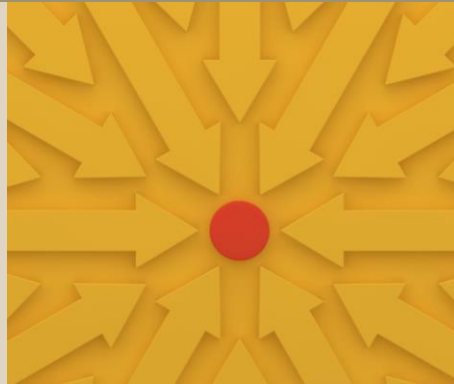
What's New for FY 2023 Reporting

Report Preparations and Resources

Because the due date is December 15, it is important to plan your schedule and resources accordingly to submit the report by this due date.

- ***Updated Resource*** - Included in the handouts is a recently updated [“Check Before You Submit” document](#) to help you confirm the report is ready to be submitted.
- ***New Resource: Examples of Data Calculations and Reporting*** – Included in the handouts is a new spreadsheet resource with examples of the data needed for the Household Report and how to report it.

Key Points for Reporting



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Key Points for Reporting

#1 – *Need Data for Each Household Assisted*

For the Household Report, you need to have the following data for each household assisted in FY 2023:

- Types of Assistance Received during FY 2023 (October 1, 2022 to September 30, 2023)
- Type of Funds used to Provide Each Type of Assistance (Regular / ARPA / CARES)
- Household Poverty Interval/Level
- Yes / No Indicators for whether Household includes Different Vulnerable Member Types (Older Adult Age 60+, Member with a disability, Young Child Under 6)
- **NEW FOR FY 2023:**
 - Housing Tenure (e.g. Own or Rent home)
 - Race of Primary Applicant
 - Ethnicity of Primary Applicant
 - Gender of Primary Applicant

Key Points for Reporting

#1 – *Need Data for Each Household Assisted*

The following are additional data you can use to report **OPTIONAL** items in the report (if you so choose):

- Yes / No Indicator for whether Household includes a young children under age 3
- Yes / No Indicator for whether Household includes a young children aged 3 to 5
- Race of all household members (will be required next year for FY 2024 reporting)
- Ethnicity of all household members (will be required next year for FY 2024 reporting)
- Gender of all household members (will be required next year for FY 2024 reporting)

Key Points for Reporting

#2 – *Report Counts of Assisted Households*























- For the Household Report, the focus is on reporting how many households received the assistance or have a demographic characteristic.
- If your program issues supplemental benefits or can give the same household multiple heating benefits, remember to *not* report the total benefits issued. Instead, you need to use your household indicator or ID to count up the total unique households.
- Example:
 - You provided 10,000 different households with heating assistance in the early winter.
 - Later, you had funds remaining and you issued a supplemental heating benefit of \$100 dollars to the same 10,000 households. That means you issued or paid 20,000 heating benefits but served 10,000 households.
 - In the Household Report, you would report 10,000 households on the Heating Assistance line.

Key Points for Reporting

#3 - Reporting Total Households Served across Assistance Types

- The Household Report requires grant recipient 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 only weatherization, equipment assistance, or nominal SNAP assistance.
- Any Type of Assistance** = Report the total count of households that received any LIHEAP assistance, including bill payment assistance, weatherization, or equipment assistance. Exclude nominal SNAP assistance.

Example:

HEATING	 Jones  Smith  Rodriguez  Jones (2 nd Heating Benefit)	   = 3 households (Jones, Smith, Rodriguez)
COOLING	 Jones  Rodriguez	  = 2 households (Jones, Rodriguez)
WX	 Lee  Rodriguez	  = 2 households (Lee, Rodriguez)
ANY TYPE OF ASSISTANCE		    = 4 households (Jones, Smith, Rodriguez, Lee)
BILL PAYMENT ASSISTANCE		   = 3 households (Jones, Smith, Rodriguez)

Presenter(s):
Melissa Torgerson

Key Points for Reporting

#4 - Reporting “Any Type of Vulnerability”

- In Section III, Column D, you report the count of households with **at least one vulnerable member**.



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. Heating (Reserved for other supplemental funding)				

- A household with multiple members with the same vulnerability type 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.

Key Concepts for Reporting

#4 - Reporting “Any Type of Vulnerability”

❑ Example:

- ❑ Household A has an older member age 60+ and a member with a disability
- ❑ Household B has a member with a disability and a young child under age 6
- ❑ Household C has an older member age 60+
- ❑ Household D has no vulnerable members

Household Scenarios	Older member Age 60+	Member with Disability	Young Child Under Age 6	Any Type of Vulnerability
Household A	Yes	Yes	No	Yes
Household B	No	Yes	Yes	Yes
Household C	Yes	No	No	Yes
Household D	No	No	No	No
Total Households to Report	2	2	1	3

Steps to Take Now to Prepare to Submit the Report by December



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Steps Now to Prepare to Submit the Report by December

#1: Getting Data Extracts/Working with IT

- To complete the report, staff need household-level data on each assisted household during FFY 2023. That data may come from one system, or it can come from several systems or sources.
- Staff and/or IT Contractors need to understand the report requirements and should be informed of the report changes for FY 2023's report.

Example Schedule:

Task	Date
Receive file from Weatherization Dept. on households assisted with LIHEAP Weatherization	October 31
Update system Household Report Queries to add in new Demographic items	November 17
Generate Draft Report	November 24
Review Report and send questions to IT	November 30
Review Updated Report	December 8
Enter report in OLDC and validate/review warnings	December 11-13
Add notes as needed and submit in OLDC	December 15

Presenter(s):
Dan Bausch

Steps Now to Prepare to Submit the Report by December

#2: Collecting & Matching Data from Program Partners

- Some grant recipients 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 sub-grant recipient administers an emergency equipment program.
- **In this situation, you 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.

Steps Now to Prepare to Submit the Report by December

#3: *Confirming Access to OLDC*

- The OLDC system requires credentials to access and submit reports.
- We recommend you confirm your access to OLDC and that you locate and initiate the report before the due date. Your OCS Program Specialist can assist you with obtaining OLDC access or contacting the OLDC Help Desk to resolve issues.
- The report will be found in this location:
 - Program Name: Low Income Home Energy Assistance
 - Grantee Name: *State Abbreviation [Code] (Reporting Years) Name of Department – No. 01*
 - Report Name: Household Report – Long Form (ACF - 121)
 - Reporting Period: 10/01/2022 – 09/30/2023

Steps Now to Prepare to Submit the Report by December

#4: Review APPRISE Emails from FY22 Review

- APPRISE reviews the reports each year and send questions about any items identified as potential reporting issues or items for clarification.
- We recommend you review any emails regarding the FY22 Household Report to make sure the items are addressed in the FY23 report submission.
- APPRISE can assist you with addressing issues or confirming issues found in FY 2022.

Reporting Guidance for New Demographic Items



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Reporting Guidance for New Demographic Items

Overview

- The Household Report now includes **new demographic items**.
- These are reported in Sections V to IX of the report.
- These have been added by HHS to help better understand the composition of households assisted by LIHEAP.
- HHS added these following an open comment period and approval of the report changes by the Office of Management and Budget (OMB).

Reporting Guidance for New Demographic Items

Overview

- There are varying viewpoints on how to collect demographic information and what categories to use.
- For the Household Report, OCS based the demographic categories and questions on what was approved and used for the LIHWAP program.
- HHS is asking all grant recipients to report using these categories for consistency.
- Recognizing the diversity in demographic categories and reporting approaches grant recipients may use, the demographic items include an “Other” category and/or an “Unknown/not reported” category to assist you.

Reporting Guidance for New Demographic Items

Tenure

V. Number of Assisted Households Owner/Renter Status

- Report on whether the household owns, rents, or has a special living arrangement (occupies without rent).
- In general, this information is self-reported on the application. If you vary benefits based on tenure, the benefit amount can also help in coding this.
- Report each household only once. We recommend using the earliest record if a household had a change in status during the year..

V. Number of Assisted Households Owner/Renter Status	
A. Owner/Renter Status	Total Number of Households
1. Own	
2. Rent with utilities billed separately	
3. Rent with utilities in rental fee	
4. Other	
5. Unknown/not reported	
6. TOTAL (Auto Calculated)	0

Presenter(s):
Dan Bausch

Reporting Guidance for New Demographic Items

Ethnicity

VI. Number of Assisted Household Applicants by Race and Ethnicity - Section A. Ethnicity

- Report the self-reported ethnicity of the primary applicant.
- For each household, you should only be reporting this for one primary applicant.
- If the information was not self-reported by the applicant, include them in “Unknown/Not Reported”.

A. Ethnicity	Total Number of Households
1. Hispanic, Latino, or Spanish Origins	
2. Not Hispanic, Latino, or Spanish Origins	
3. Unknown/not reported	
4. TOTAL (Auto Calculated)	0

Reporting Guidance for New Demographic Items

Race

VI. Number of Assisted Household Applicants by Race and Ethnicity - Section B. Race

- Report the self-reported race of the primary applicant.
- For each household, you should only be reporting this for one primary applicant.
- If an applicant selected more than one applicable category, count them in category 6.
- If the information was not self-reported by the applicant, include them in “Unknown/Not Reported”.

B. Race	Total Number of Households
1. American Indian or Alaska Native	
2. Asian	
3. Black or African American	
4. Native Hawaiian or Other Pacific Islander	
5. White	
6. Multi-race (two or more of the above)	
7. Other	
8. Unknown/not reported	
9. TOTAL (Auto Calculated)	0

Presenter(s):
Dan Bausch

Reporting Guidance for New Demographic Items

Gender

VII. Number of Assisted Household Applicants by Gender

- Report the self-reported gender of the primary applicant.
- For each household, you should only be reporting this for one primary applicant.
- If the information was not self-reported by the applicant, include them in “Unknown/Not Reported”.

VII. Number of Assisted Household Applicants by Gender	Total Number of Households
1. Self Identified Male	
2. Self Identified Female	
3. Other	
4. Unknown/not reported	
5. TOTAL (Auto Calculated)	0

Presenter(s):
Dan Bausch

Reporting Guidance for New Demographic Items

Optional Items for FY23 Reporting

- Sections VIII and IX on household member demographics are optional until next year's FY 2024's report.
- These ask for the count of ALL household members by ethnicity, race, and gender.
- ***Note:** You should be collecting this data for current households assisted during FY 2024 in order to report it next year.

VIII. Assisted Household Members by Race and Ethnicity*	
A. Ethnicity	Number of Household Members
1. Hispanic, Latino, or Spanish Origins	
2. Not Hispanic, Latino, or Spanish Origins	
3. Unknown/not reported	
4. TOTAL (Auto Calculated)	0
B. Race*	Number of Household Members
1. American Indian or Alaska Native	
2. Asian	
3. Black or African American	
4. Native Hawaiian or Other Pacific Islander	
5. White	
6. Multi-race (two or more of the above)	
7. Other	
8. Unknown/not reported	
9. TOTAL (Auto Calculated)	0

IX. Assisted Household Members by Gender*	Number of Household Members
1. Self Identified Male	
2. Self Identified Female	
3. Other	
4. Unknown/not reported	
5. TOTAL (Auto Calculated)	0

Final Reminders



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Final Reminders

Due Dates and Final Data

- **The report is due in OLDC on December 15, 2023.** Grant recipients should be planning to complete by this date.
- The final Household Report must contain final data from grant recipient tracking systems and program records.
- If you need technical assistance in completing the report, please contact APPRISE as soon as possible (do not wait until the report is due).

Final Reminders

Household Report Long Form Changes

- There are two main changes to the Household Report – Long Form for FFY 2023:

Change #1 - The report no longer collects the count of applicants for each type of assistance.

Change #2 - The report now collects new demographic information on assisted households. Some of the new items are required for FY 2023, and some are optional until FY 2024 reporting.

- If you need assistance with understanding or implementing the report changes, please contact APPRISE.

Final Reminders

OLDC Resources

- To complete this reporting requirement, you need to **submit** your form in the OLDC System.
- 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 GrantSolutions Help Desk:
 - (866) 577-0771
 - help@grantsolutions.gov

Final Reminders

Submission Process

- To complete this reporting requirement, you need to **submit** your form in the OLDC System.
- 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.
- 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 displays 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 contains 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 the following stages: Initialized (with a checkmark icon), 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.

Final Reminders

OLDC Warning & Error Messages

- Several validation checks are programmed into OLDC, and a warning or error message will appear if a check fails.
 - 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 Grant Recipients are able to submit their Household Report in OLDC.
- **If either a warning or error message appears and you are unable to resolve it, contact APPRISE for assistance.**

Final Reminders

Updating & Revising the Report

- After you submit your report...
 - APPRISE will e-mail grant recipients to alert them to any issues or questions based on a review of the submitted Household Report.
 - Grant recipients should provide a response and make any corrections to the report.
 - When the report is confirmed to be 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.

Final Reminders

Household Report Resources

- **FY 2023 Household Report AT & Instructions**
 - <https://www.acf.hhs.gov/ocs/policy-guidance/liheap-household-report-short-form-and-long-form-federal-fiscal-year-2023>
- **2022 HHS Poverty Guidelines to use for Poverty Intervals:**
 - <https://www.acf.hhs.gov/ocs/policy-guidance/liheap-im-2022-03-federal-poverty-guidelines-optional-use-ffy-2022-and>
- **State Median Income Estimates**
 - <https://www.acf.hhs.gov/ocs/policy-guidance/liheap-im-2023-02-state-median-income-estimates-optional-use-ffy-2023-and>
- **Updated “Check Before You Submit” Document:**
 - <https://liheappm.acf.hhs.gov/sites/default/files/private/reports/Household-Report-Check-Before-You-Submit.pdf>
- **Required Reports Support on the LIHEAP PMW:**
 - <https://liheappm.acf.hhs.gov/required-reports/>

Final Reminders

Upcoming Training Webinars – Registration Coming Soon

- *Repeat of Today's Webinar* – December
- *Performance Data Form – Module 1 Grantee Survey Webinar*
 - November
 - Repeat of Webinar in January
- *Performance Data Form – Module 2 Performance Measures Webinar*
 - November
 - Repeat of Webinar in January
- *Quarterly Report Webinar*
 - February

Presenter(s):
Melissa Torgerson

Final Reminders

Reminder to Begin Vendor Outreach for Performance Data Forms

- Because the FY 2023 Performance Measures is due in January, **each state should be planning to request and collect energy expenditure data from your top vendors now.**
- OCS expects each state to target collecting data from the...
 - Top five electric companies (include cases **with and without** electric main heat)
 - Top five natural gas companies
 - Top ten propane vendors
 - Top ten fuel oil vendors
- **We recommend targeting the vendors with the most clients and requesting data by December to have time for data review and preparing the report.**

Audience Poll Question #2

QUICKPOLL

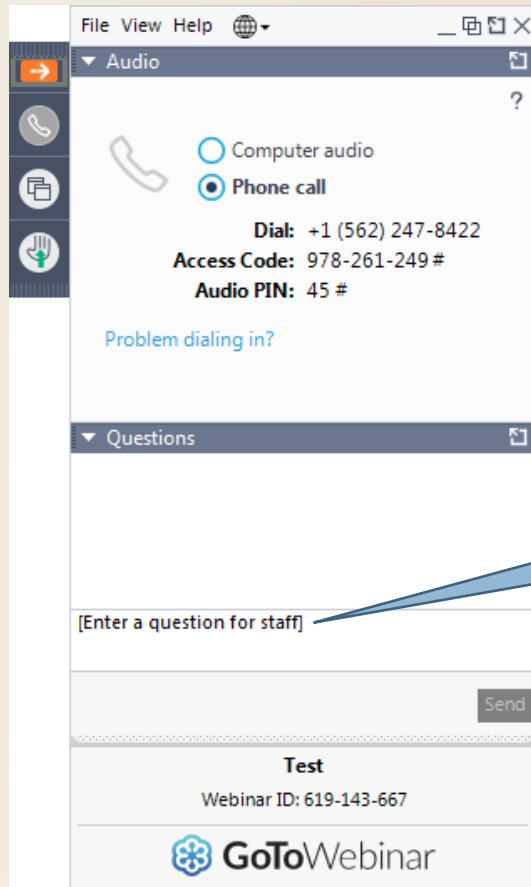
How helpful was this webinar in understanding what is needed to complete the FY 2023 Household Report – Long Form?

Please select one:

- **Not at all helpful**
- **Not too helpful**
- **Somewhat helpful**
- **Very helpful**

Presenter(s):
Melissa Torgerson

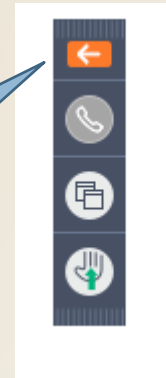
GoToWebinar Question Box



Enter text here to ask a question.

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

Click this button to expand sidebar.



Presenter(s):
Melissa Torgerson

Final Reminders

Support Resources

- OCS liaisons
 - <http://www.acf.hhs.gov/programs/ocs/resource/division-of-energy-assistance-federal-staff>
- LIHEAP Map State and Territory Contact Listing
 - <https://www.acf.hhs.gov/ocs/map/liheap-map-state-and-territory-contact-listing>
- LIHEAP Map Tribal Contact Listing
 - <https://www.acf.hhs.gov/ocs/map/liheap-map-tribal-contact-listing>
- APPRISE Team
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 - Melissa Torgerson, melissa@verveassociates.net; 503-706-2647
 - Daniel Bausch, Daniel-Bausch@appraiseinc.org; 609-252-9050

Extra Slides on Using OLDC




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Submitting the Report

Accessing OLDC

- OLDC is accessed through Grant Solutions, accessed at <https://www.grantsolutions.gov/gs>
 - Once logged in, click “OLDC” in the top taskbar to access the OLDC homepage.
 - Click “Report Form Entry”
 - Select, “Low Income Home Energy Assistance” as the program, your state/agency as the grant recipient, and “Household Report” as the report.
 - Click the plus sign icon under the **10/01/2022 - 09/30/2023** to access the report.

Reporting Period ▾	Type ▾	Report Status ▾	Actions ▾
10/01/2022 - 09/30/2023	Annual		+
10/01/2021 - 09/30/2022	Annual		+
10/01/2020 - 09/30/2021	Annual		+











Submitting Your Final Report

- If the preliminary form status is “Submitted” (not yet accepted by your liaison):
 - In the Report Status page screen, click “Unsubmit Report”.

Report Form Status				
<u>Report Submissions:</u>	<u>Report Status:</u>	<u>Status Date:</u>	<u>Report Action:</u>	<u>Print:</u>
View Original	Submitted	07/31/2019	Unsubmit Report Review	HTML Print Form <input type="button" value="Go"/>

- Then you will have to click “View Original” to go into your report and click “Uncertify”. At that point, the fields in your report will become editable again. The system will not keep a copy of your old report.
- If the preliminary form status is “Submission Accepted by CO” (i.e. accepted by your liaison):
 - In the Form Selection Page, click the icon that resembles a blank sheet of paper:

Reporting Period ▾	Type ▾	Report Status ▾	Actions ▾
10/01/2020 - 09/30/2021	Annual		+
10/01/2019 - 09/30/2020	Annual	Submission Accepted by CO	   
10/01/2018 - 09/30/2019	Annual	Submission Accepted by CO (Revision #1)	   

- This will create a new, editable version of your report. A copy of the old one will be kept in the system.