Completing the
Federal Fiscal Year 2025 (FY25)
LIHEAP Quarterly Report

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

DECEMBER 17, 2024

WELCOME:
AKM RAHMAN (OCS)

PRESENTERS:
MELISSA TORGERSON (VERVE ASSOCIATES)
DAN BAUSCH (APPRISE)

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Welcome

- **Purposes of this Webinar**

  - To review the key requirements for completing the federal Fiscal Year 2025 (FY25) *LIHEAP Quarterly Performance and Management Report* (referred to as the *LIHEAP Quarterly Report*).

  - To review the data you need to prepare the report.

  - To review the process for submitting and updating the report.

- **Audience for this Webinar**

  - State, Territory, and Tribal LIHEAP Coordinators.

  - Program staff and contractors that assist with completing the report.

Presenter(s):
Akm Rahman

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Speakers

- Today's webinar is being conducted by APPRISE, a non-profit research institute that is contracted with ACF to provide LIHEAP training and technical assistance.

- APPRISE works with LIHEAP grant recipients by assisting with reviewing your *LIHEAP Quarterly Report* and providing one-on-one technical assistance for reporting or performance management.

Daniel Bausch

Senior Project Director – APPRISE

Melissa Torgerson

Owner – Verve Associates LLC

Applied Public Policy Research
APPRISE
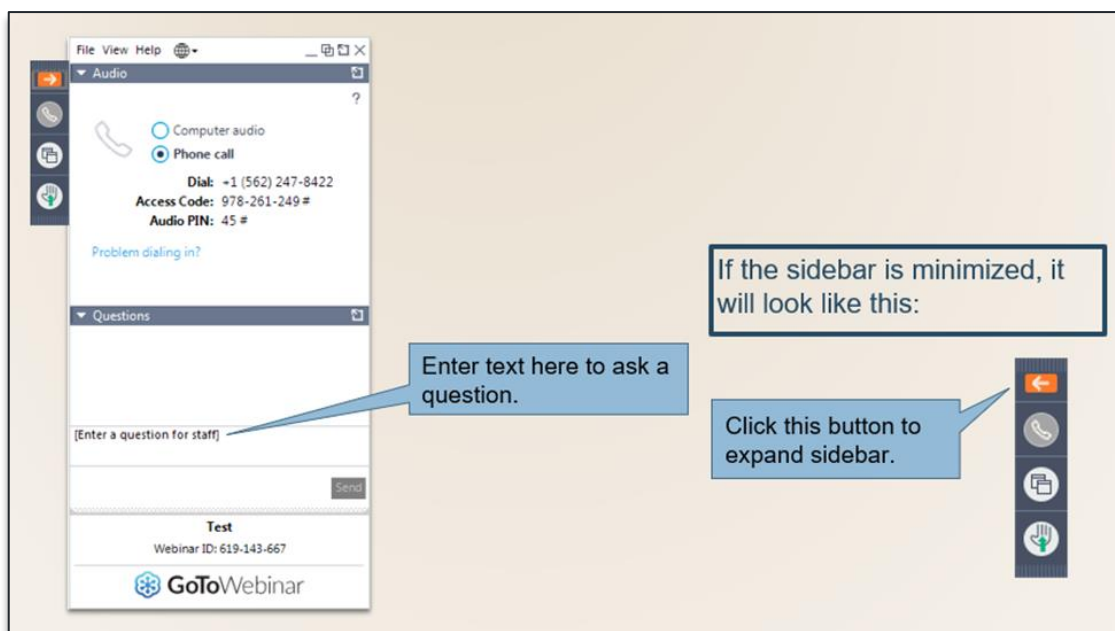Institute for Study and Evaluation

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Presenter(s):
Akm Rahman

Webinar Overview

- **Structure of the Webinar**

  - 60-minutes.

  - **Slides and other resources available for download now** under "Handouts" in the GoToWebinar Sidebar.

  - The webinar is being recorded and will be published on the ACF YouTube channel.

Presenter(s):
Melissa Torgerson

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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

Presenter(s):
Melissa Torgerson

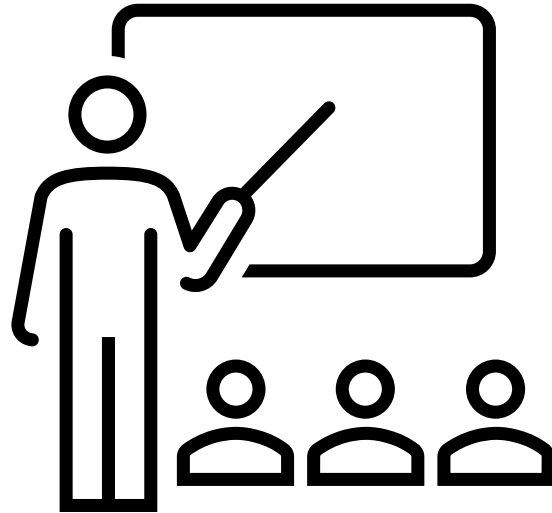ADMINISTRATION FOR
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Audience Poll Question #1

How prepared do you think your team is for correctly completing the *LIHEAP Quarterly Report* for Quarter 1 of FY25*?*

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)

Presenter(s):
Melissa Torgerson

Overview of the *LIHEAP Quarterly Report*

Overview on the LIHEAP Quarterly Report
Background

- Since the beginning of LIHEAP, the Department of Health and Human Services (HHS) has collected important LIHEAP information from grant recipients to administer and report on the program.

- Historically, these reports collected information on:

    1) Planned or estimated program activities **for the next fiscal year**, or

    2) Outcomes and summary information from **the prior fiscal year**.

- To provide more timely information on LIHEAP activity, in 2022, HHS created the *LIHEAP Quarterly Report*, which was approved by the Office of Management and Budget after public comment.

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Presenter(s):
Dan Bausch

Overview of the LIHEAP Quarterly Report
Background

**Reports Looking Forward
(Next Fiscal Year)**

"Real-time" Report

**Reports Looking Back
(Prior Fiscal Year)**

LIHEAP Model Plan

- Provides information on what you plan to do during the upcoming fiscal year.
- Specifies the characteristics of your programs.

LIHEAP Quarterly Report

- Provides key "real time" indicators on your LIHEAP program each quarter.

Carryover Report & SF-425

- Information on how much funding was obligated and/or expended in the past fiscal year.

Household Report

- Summarizes households served with each type of assistance and the household member demographics for the prior fiscal year.

Performance Data Form (States Only)

- Provides information on uses of funds and impacts of assistance

Presenter(s):
Dan Bausch

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Overview on the LIHEAP Quarterly Report
History of Report

- 2022:
  - HHS announced the report in a Federal Register Notice and solicited public comment.
  - OMB approved the report though October 31, 2025.
  - HHS required all grant recipients to submit the first *LIHEAP Quarterly Report* in 2022 and provided training and assistance on the report requirements.

- 2023:
  - Based on public comments, HHS made changes to the report, including making some items optional for tribal grant recipients awarded less than $50,000 in regular LIHEAP funds.

- 2024:
  - The *LIHEAP Quarterly Report* became available for submission on the Online Data Collection System (OLDC).

Presenter(s):
Dan Bausch

Overview of the LIHEAP Quarterly Report
Key Purposes

The *LIHEAP Quarterly Report* collects limited key information on grant recipients' programs each quarter, including:

Program Outcomes – How many households were assisted? How much funding was obligated so far and is the grant recipient on track to obligate 90% of funding in the current fiscal year?

Program Impacts – How many instances occurred where assistance prevented service loss or restored lost energy service?

Program Changes, Challenges, and Needs – What recent changes have been made to program design or implementation? What challenges or training needs currently exist?

Presenter(s):
Dan Bausch

Overview of the LIHEAP Quarterly Report
Why is this Collected?

The information you report is used to…

Track important LIHEAP indicators closer to "real-time".

Demonstrate LIHEAP activity levels during different times of year.

Respond to inquires from Congress, the Administration, and others about LIHEAP funds and activities taking place during the most recent quarter.

Inform where and how OCS should target additional training and technical assistance to aid grant recipients.

Communicate information to the public about LIHEAP via the *LIHEAP Data Dashboard*.

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Presenter(s):
Dan Bausch

Overview of the LIHEAP Quarterly Report
LIHEAP Data Dashboard

- HHS has published a **LIHEAP Data Dashboard** that included *LIHEAP Quarterly Report* data for all grant recipients, including states, territories, and tribes.

- This tool is publicly available and allows you to see your own quarterly data from FY24, as well as national statistics.

- The tool also summarizes program information from the Model Plans.

- Link to Dashboard: https://liheap-fy24-data-dashboard-hhs-acf.hub.arcgis.com/

FY24 Quarterly Reports with States and Tribes		SELECT A TYPE National	GRANT RECIPIENT ALL
Quarter 1	**Quarter 2**	**Quarter 3**	**Quarter 4**
LIHEAP FY24 Q1 Obligated Funds **$2.1B**	LIHEAP FY24 Q2 Obligated Funds **$2.7B**	LIHEAP FY24 Q3 Obligated Funds **$3.4B**	Coming Soon
Total Number of Assisted Households 🏠 3.1M	Total Number of Assisted Households 🏠 1.9M	Total Number of Assisted Households 🏠 1.2M	

Restored Home Energy	Prevented Loss of Home Energy	Restored Home Energy	Prevented Loss of Home Energy	Restored Home Energy	Prevented Loss of Home Energy		
146k Occurrences	466k Occurrences	140k Occurrences	722k Occurrences	98k Occurrences	493k Occurrences		

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Presenter(s):
Dan Bausch

What's New for FY25 Reporting

What's New for FY25 Reporting
Report Announcements and Due Date

- **Report Announcement** – OCS released the [Action Transmittal](#) with Instructions and the report form example.

- **Due Date** – The report for Quarter 1 of FY25 is due February 28th.

- **Report Availability** – The Q1 report is available on the Online Data Collection System (OLDC) for submission.

- **Submission** – The report must be submitted in OLDC and must be validated and certified by the designated authorized official.

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Presenter(s):
Dan Bausch

What's New for FY25 Reporting
Report Due Dates

Schedule for FY25 LIHEAP Quarterly Report:

Report	Reporting Period	Report Due Date
Quarter 1	October 1 – December 31, 2024	February 28th, 2025
Quarter 2	January 1 – March 31, 2025	April 30th, 2025
Quarter 3	April 1 – June 30, 2025	July 31st, 2025
Quarter 4	July 1 – September 30, 2025	October 31st, 2025

Presenter(s):
Dan Bausch

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What's New for FY25 Reporting
Report Changes

- ==Good News:== There are no changes to the *FY25 LIHEAP Quarterly Report* from last year's FY24 report.

- The forms have the same layout and requirements as last year.

- Please remember to 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 you may contact the OLDC Help Desk to resolve issues.

Presenter(s):
Dan Bausch

What's New for FY25 Reporting
Resources to Assist With Completing the Report

The Q1 report is due on Feb 28, 2025. The handouts for this webinar include resources to help you submit the report:

- *FY25 Action Transmittal (AT):* Included is the AT published by OCS that confirms the deadlines and shares the form template and instructions.

- *FY25 Quarterly Report Instructions:* Included are the instructions for completing the FY25 Quarterly Report.

- *Template:* Included is an Excel spreadsheet showing the FY25 report layout.

- *Check Before You Submit:* Included in the handouts is a "Check Before You Submit" document to help you confirm your report is ready to be submitted.

Presenter(s):
Dan Bausch

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Data Needed to Complete the Report

Data Needed to Complete the Report
Types of Data

To complete the *LIHEAP Quarterly Report*, you need four different types of data and information.

1. Assisted Household Data

2. Household Energy Status Information*

3. Fiscal Data on Obligations*

4. Program Implementation Information*

* Items 2, 3 and 4 are optional for tribal grant recipients awarded less than $50,000 in FY25 regular non-supplemental LIHEAP Funds.

Presenter(s):
Melissa Torgerson

Data Needed to Complete the Report
#1 - *Assisted Household Data*

- **Data Source** = <u>Program Records</u> of assistance recipients or awarded benefits

- **Data Population** = All households assisted with regular LIHEAP, crisis, and Weatherization or equipment services.

- **Data Time Period Needed** = 3-month quarter

- **Important Note**: Focus is Households (NOT benefits issued or all household members)

<u>*Example of Program records:*</u>

ID	Primary Applicant Name	Benefit Type Received	Benefit Award Date
██████	██████	Heating	11/2/2024
██████	██████	Crisis	11/16/2024

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Presenter(s):
Melissa Torgerson

Data Needed to Complete the Report
#2 – *Household Energy Status Information*

- **Data Source** = <u>Application or intake information and Program Records</u>

- **Data Population** = All households assisted with regular LIHEAP, crisis, and Weatherization or equipment services *who had energy service restored or imminent loss of service prevented*.

- **Data Time Period Needed** = 3-month quarter

Note for Tribal Grant Recipients: It is optional for Tribal Grant Recipients awarded less than $50,000 in FY25 LIHEAP Funds to report this information.

- **Important Note**: Focus is occurrences

- *Example of Program records:*

ID	Primary Applicant Name	Benefit Type Received	Benefit Award Date	Disconnected or Out of Fuel? (Restoration)	Past Due or Almost Out of Fuel? (Prevention)
▮▮▮▮	▮▮▮▮	Heating	11/2/2024	No	No
▮▮▮▮	▮▮▮▮	Crisis	11/16/2024	Yes	No

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Presenter(s): Melissa Torgerson

Data Needed to Complete the Report
#3 – *Fiscal Data on Obligations*

- **Data Source** = <u>Fiscal Records</u> on Obligation of Awarded Funds

- **Data Population** = Funds awarded by HHS for LIHEAP for the fiscal year

- **Data Time Period Needed** = Report amount as of last day of quarter

- **Important Note**: Focus is cumulative Obligation amount (which may differ from expenditures)

Example of Fiscal Records

CAN	Award Amount	Obligation Amount	Obligation Date
Block Grant	$5 million	$4 million	10/5/2024
IIJA	$1 million	$200,000	10/20/2024
Total FY25 Awards	$6 million	$4.2 million	Obligated as of end of Q1

Note for Tribal Grant Recipients: It is optional for Tribal Grant Recipients awarded less than $50,000 in FY25 LIHEAP Funds to report this information.

Presenter(s): Melissa Torgerson

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Data Needed to Complete the Report
#4 – Program Implementation Information

- **Data Source** = <u>Administrative and Documentation Records</u>

- **Data Time Period Needed** = Report changes / developments to program made since prior *LIHEAP Quarterly Report.*

- **Important Note**: Providing this information is <u>very valuable</u> to OCS as it is used to inform training and technical assistance. Grant recipients are encouraged to highlight policy and programmatic changes or developments to their programs.

> <u>Note for Tribal Grant Recipients</u>: It is optional for Tribal Grant Recipients awarded less than $50,000 in FY25 LIHEAP Funds to report this information.

Presenter(s):
Melissa Torgerson

Section-By-Section Instructions

Section-by-Section Instructions
Report Sections

- **Section I: Total Households Assisted**

- **Section II: Performance Management**

- **Section III: Estimated uses of LIHEAP Funds**

- **Section IV: LIHEAP Program Implementation and Support**

- **Section V: Remarks**

Presenter(s):
Melissa Torgerson

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Section-by-Section Instructions
Section I (Total Households Assisted)

- This section asks you to report one data point.

- All Grant Recipients must complete this section.

- What to Report:

  - **Line 1:** Report the total count of households assisted by LIHEAP during the three-month quarter.

I. Total Households Assisted		
	A. Total Households Q1	
1. Number of assisted households		

Presenter(s):
Melissa Torgerson

Section-by-Section Instructions
Section I (Total Households Assisted)

- **This should include**:

  - Households issued or awarded a benefit during the quarter that was paid in full or in part with federal LIHEAP funds.
  - Households who received equipment or weatherization during the quarter that was paid in full or in part with federal LIHEAP funds.

- **This should NOT include:**

  - Households served entirely with other funds besides federal LIHEAP funds.
  - Households who applied, but were denied and did not receive a benefit during the quarter.
  - Households who applied but were not assisted until after the quarter (they would be counted in the next quarter).
  - Households who only received a nominal benefit to assist with SNAP eligibility (commonly called Heat and Eat households).

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Melissa Torgerson

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Section-by-Section Instructions
Section I (Total Households Assisted)

- **Guidance for Calculating**

  - *Counting Unit:* Count households, not benefits issued or total household members.

  - *Multiple benefits*: If a household received multiple benefits during the same quarter, count the household only once when counting the total households assisted that quarter.

- **Do I count a household in the report if they were counted in a prior Quarter?**

  - Yes, report on all households assisted with LIHEAP funds during the specified quarter, even if they were assisted in a prior quarter and reported in that previous quarter's report.

- **What about LIHEAP Weatherization and Equipment?**

  - The intention of the report is to include all assisted households in the quarter. You should work with program partners to obtain information on a quarterly basis to identify and include households assisted with these services during the quarter.

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Melissa Torgerson

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Section-by-Section Instructions
Section II (Performance Management)

- <u>Section I:</u> **Total Households Assisted**

- <u>Section II:</u> **Performance Management**

- <u>Section III:</u> **Estimated uses of LIHEAP Funds**

- <u>Section IV:</u> **LIHEAP Program Implementation and Support**

- <u>Section V:</u> **Remarks**

Presenter(s):
Melissa Torgerson

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Section-by-Section Instructions
Section II (Performance Management)

- This section asks you to report two data points.

- This section is optional for Tribal Grant Recipients who were awarded less than $50,000 in FY25 LIHEAP funds.

- What to Report:

    - **Line 1:** Report the <u>total number of times during the three-month quarter that a LIHEAP benefit or LIHEAP assistance *prevented* the imminent loss of home energy service.</u>

    - **Line 2:** Report the <u>total number of times during the three-month quarter that a LIHEAP benefit or LIHEAP assistance *restored* home energy service to a household without energy service.</u>

II. Performance Management	A. Total Occurrences Q1	
1. Number of Occurences of households where LIHEAP prevented the loss of home energy.		
2. Number of Occurences of households where LIHEAP restored home energy.		

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Presenter(s): Melissa Torgerson

Section-by-Section Instructions
Section II – Line 1: *Prevention of Loss*

- **This should include**:

  - All instances where a benefit during the quarter that was paid in full or in part <u>with federal LIHEAP funds</u> prevented the imminent loss of energy service.

- **This should <u>NOT</u> include:**

  - Instances where no federal LIHEAP funds were used.
  - Instances where LIHEAP assistance was provided to assist households that did NOT face imminent loss of energy service.

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Presenter(s):
Melissa Torgerson

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Section-by-Section Instructions
Section II – Line 1: *Prevention of Loss*

Examples of Preventions

- Households with a disconnection/shut-off notice who received a LIHEAP benefit that applied to that account, preventing their service from being disconnected.

- Households low on delivered fuel who received a LIHEAP fuel payment or fuel delivery.

- Households who had working, but failing equipment that was repaired or replaced with LIHEAP federal funds.

Presenter(s):
Melissa Torgerson

Section-by-Section Instructions
Section II – Line 1: *Prevention of Loss*

- **Guidance for Calculating**

  - *Counting Unit:* Count instances of prevention.

  - *Multiple instances*: If a household was assisted multiple times that prevented imminent loss of service, count all instances.

- **What constitutes an "imminent loss" of home energy service?**

  - Each Grant Recipient determines what constitutes an "imminent" loss of service to characterize assistance as a prevention of loss.

  - For more information, view the Supplement on Determining At-Risk Households.

- **Is this just for Crisis/Emergency Assistance?**

  - This depends on your program design. Some programs will automatically provide crisis assistance for households facing imminent loss of service. Others may provide regular assistance in some instances. The intention is to count all instances where any benefit type prevented the imminent loss of service.

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Presenter(s):
Melissa Torgerson

Section-by-Section Instructions
Section II – Line 2: *Restoration of Service*

- **This should include**:

  - All instances where a benefit during the quarter that was paid in full or in part <u>with federal LIHEAP funds</u> restored energy service to a household that had lost service.

- **This should <u>NOT</u> include:**

  - Instances where no federal LIHEAP funds were used.
  - Instances where LIHEAP assistance was provided to assist households that still had energy service.

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Presenter(s):
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Section-by-Section Instructions
Section II – Line 2: Restoration of Service

Examples of Restorations:

- Households shut off from utilities via disconnection who received a LIHEAP benefit that resulted in restored service.

- Households without any amount of a delivered fuel who received a LIHEAP fuel payment or fuel delivery.

- Households with non-working Equipment that had it repaired or replaced with LIHEAP federal funds.

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Melissa Torgerson

Section-by-Section Instructions
Section II – Line 2: *Restoration of Service*

- **Guidance for Calculating**

  - *Counting Unit:* Count instances of restoration of service.

  - *Multiple instances*: If a household was assisted multiple times that restored service, count all instances.

- **What constitutes a restoration of home energy service?**

  - A restoration should be an instance where you know that energy service was lost, and you have an assurance that LIHEAP assistance resulted in service being regained.

  For more information, view the Supplement on Determining Service Restoration.

- **Is this just for Crisis/Emergency Assistance?**

  - Most programs will automatically provide crisis assistance for households who have lost service. The intention is to count all instances where any benefit type restored service, even if that was not done via your primary crisis component.

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Presenter(s):
Melissa Torgerson

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Section-by-Section Instructions
Section III (Estimated Obligations)

- **Section I:** Total Households Assisted

- **Section II:** Performance Management

- **Section III:** Estimated uses of LIHEAP Funds

- **Section IV:** LIHEAP Program Implementation and Support

- **Section V:** Remarks

Presenter(s):
Melissa Torgerson

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Section-by-Section Instructions
Section III (Estimated Obligations)

- This section asks you to report one data point.

- This section is optional for Tribal Grant Recipients who were awarded less than $50,000 in FY25 regular non- supplemental LIHEAP funds.

- What to Report:

  - **Line 1 Column A:** Report the total **cumulative** amount of your FY25 funds that have been **obligated** as of the end of the quarter

  - Note: Column B is Not Applicable for Quarter 1.

III. Estimated Use of LIHEAP Funds

	Obligations by LIHEAP Funding Source (if applicable)	
	A. LIHEAP FY 2024 Allotment	B. {Reserved, if applicable} Other Supplemental Allotment
1. Amount of funds obligated		

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Section-by-Section Instructions
Section III (Estimated Obligations)

Guidance on Obligations

- The LIHEAP statute provides grant recipients with flexibility in defining what constitutes the obligation of funds. As a result, the definition for "obligation" varies across grant recipients.

- **Obligations are <u>not always</u> the same as expenditures.**
  - Expenditures generally include benefits that are issued/paid.
  - In some cases, obligated funds are not actually expended until after the end of the FY.

- Examples of Obligations (as defined by some grant recipients):
  - Approval letters issued to clients
  - Credit lines established with vendors
  - Contracts to Perform Services

- For more information, view the IM on LIHEAP Obligations, Expenditures, and Refunds.

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Presenter(s):
Melissa Torgerson

Section-by-Section Instructions
Section III (Estimated Obligations)

- **This should include**:

  - All Obligations of FY25 funds, including for regular LIHEAP funds and the supplemental Infrastructure and Investment Job Act (IIJA) LIHEAP funds.

  - Report the cumulative (total obligated in the whole fiscal year) amount as of the end of the quarter.

    - NOTE: For Q2, Q3, and Q4, this means that you are not just reporting funds obligated in the 3-month quarter. You are reporting the total amount obligated "to-date", which includes the amounts obligated during the prior quarters.

- **This should NOT include:**

  - Any non-federal LIHEAP funds.

  - Any prior funds you carried into FY25.

  - Expenditure amounts if you define "obligation" differently from expenditures.

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Presenter(s):
Melissa Torgerson

Section-by-Section Instructions
Section III (Estimated Obligations)

Example of Reporting

- In FY25, you were awarded $5 million by HHS for LIHEAP.
  - In Quarter 1, you obligated $3 million of these funds.
  - In Quarter 2, you obligated an additional $1 million of these funds.
  - In Quarter 3, you obligated $0 additional funds.
  - In Quarter 4, you obligated $800,000 of the remaining funds. You decided to carry over the remaining $200,000 for obligation later in FY26.

	What you Obligated During that time	Cumulative amount to report in the Quarterly Report
Quarter 1	$3 million	$3 million
Quarter 2	$1 million	$4 million
Quarter 3	$0	$4 million
Quarter 4	$800,000	$4.8 million

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Presenter(s):
Melissa Torgerson

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Section-by-Section Instructions
Section IV (Program Implementation)

- **Section I: Total Households Assisted**

- **Section II: Performance Management**

- **Section III: Estimated uses of LIHEAP Funds**

- **Section IV: LIHEAP Program Implementation and Support**

- **Section V: Remarks**

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Presenter(s):
Melissa Torgerson

Section-by-Section Instructions
Section IV (Program Implementation)

- Section IV asks you to answer questions and provide short descriptive responses about program changes, challenges, and needs. This section is optional for Tribal Grant Recipients awarded less than $50,000 in FY25 regular LIHEAP funds.

- There are some differences in the questions asked in this section by Quarter.

  - **Q1-Q3:** *Have you made changes to…*

  - **Q4:** *What were the result of those changes to…*

    - *…Income Eligibility Requirements*

    - *…Income Verification/Documentation Requirements*

    - *…Outreach Strategies*

    - *…Benefit Matrix and/or increased Crisis Maximum Amount*

    - *…Prioritizing Vulnerable Populations*

    - *…Arrearage Forgiveness Policies*

    - *…Other LIHEAP Policies*

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Presenter(s):
Melissa Torgerson

Section-by-Section Instructions
Section IV (Program Implementation)

Reporting Guidance

- Some questions require a "Yes" or "No" response.
  - If you answer "Yes" to any of these questions, you need to provide a brief explanation of **what, when** and **why** changes were made in the response space provided below each question.

- Other questions ask for a narrative response only.
  - Please provide a response for these narrative questions. <u>If the question does not apply to you, please put "N/A".</u>

- <u>Note</u>: This information is used by OCS to identify training and technical assistance needs and may be included in the future in the public LIHEAP Data Dashboard.

Presenter(s):
Melissa Torgerson

Section-by-Section Instructions
Section V (Remarks)

- **Section I:** **Total Households Assisted**

- **Section II:** **Performance Management**

- **Section III:** **Estimated uses of LIHEAP Funds**

- **Section IV:** **LIHEAP Program Implementation and Support**

- **Section V:** **Remarks**

Presenter(s):
Melissa Torgerson

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Section-by-Section Instructions
Section V (Remarks)

- Section V should be used to report any comments to explain items in the report, or to describe any concerns regarding the reliability or validity of the data provided in the *LIHEAP Quarterly Report*.

V. Remarks
1. Enter any explanation needed regarding the reliability and/or validity of the above-reported data.
Response:

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Presenter(s):
Melissa Torgerson

Final Reminders

Final Reminders
Due Dates and Final Data

- All Grant Recipients must submit the following *FY25 LIHEAP Quarterly Report*:

  - **Quarter 1** (October to December 2024): Due on <mark>Feb 28, 2025</mark>

  - **Quarter 2** (January to March 2025): Due on April 30, 2025

  - **Quarter 3** (April to June 2025): Due on July 31, 2025

  - **Quarter 4** (July to September 2025): Due on October 31, 2025

- If you need technical assistance in completing the report, please contact your OCS Program Specialist as soon as possible (do not wait until the report is due).

- If you are facing challenges in meeting the due date for a report, please contact your OCS Program Specialist <u>in advance</u> of the due date. You can find their contact information on the LIHEAP Contact Information webpage.

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<div style="border:1px solid">Presenter(s): Dan Bausch</div>

Final Reminders
Changes from Prior Report

- ==Good News:== There are no changes to the *FY25 LIHEAP Quarterly Report* from last year's FY24 report.

- The forms have the same layout and requirements as last year.

Presenter(s):
Dan Bausch

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

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Presenter(s):
Dan Bausch

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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

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Presenter(s): Dan Bausch

Final Reminders
Updating & Revising the Report

- After you submit your report...

  - **OCS and APPRISE will review the submitted report.** The purpose of the review is to provide technical assistance to help grant recipients submit complete reports; the review is NOT for compliance.

  - **APPRISE will e-mail each grant recipient** via e-mail to alert them to any issues or questions and assist with resolving any potential reporting issues.

  - **Grant recipients should respond to APPRISE** in a timely manner and work to make any needed corrections or clarifications.
    - Please ensure you "reply all" to APPRISE emails so that APPRISE can address any questions or issues as quickly as possible.

Presenter(s):
Dan Bausch

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Final Reminders
LIHEAP Quarterly Report Resources

- **OCS LIHEAP Forms**

  - https://www.acf.hhs.gov/ocs/form/liheap-forms-and-funding-applications

- **FY25 LIHEAP Quarterly Report AT**

  - https://www.acf.hhs.gov/ocs/policy-guidance/acf-ocs-liheap-2025-01-liheap-quarterly-report-submission-fy-2025

- **Updated "Check Before You Submit" Document**

  - https://liheappm.acf.hhs.gov/sites/default/files/private/grantee_tools/best_practices/Quarterly-Report-Check-Before-You-Submit.pdf

- **Required Reports Support on the LIHEAP PMW**

  - https://liheappm.acf.hhs.gov/required-reports/

Presenter(s):
Dan Bausch

Audience Poll Question #2

How helpful was this webinar in understanding what is needed to complete the *LIHEAP Quarterly Report* for FY25?

Please select one:

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

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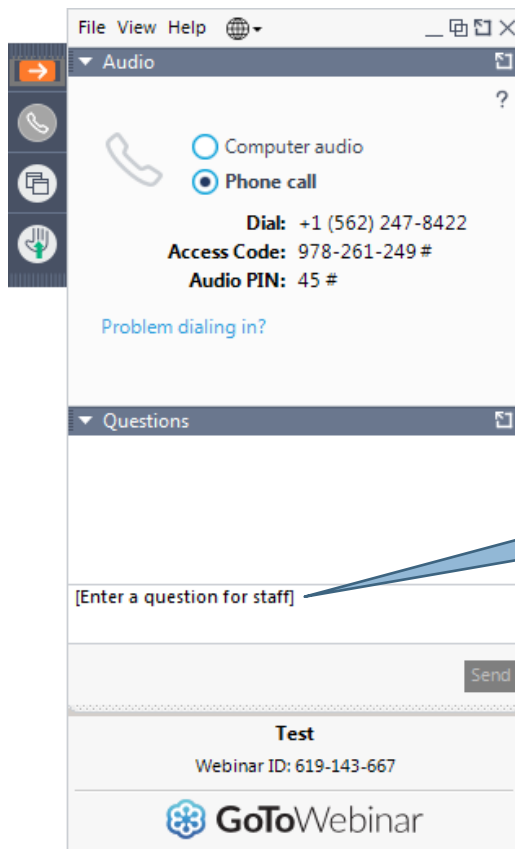
If the sidebar is minimized, it will look like this:

Click this button to expand sidebar.

Enter text here to ask a question.

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

  - Daniel Bausch, Daniel-Bausch@appriseinc.org; 609-252-9050

  - Melissa Torgerson, melissa@verveassociates.net; 503-706-2647

  - Nicolas Mititelu, nicolas-mititelu@appriseinc.org; 646-854-4982

  - Jeb Jacob, Jeb-Jacob@appriseinc.org; 609-252-0005

  - Luke Gooding, Luke-Gooding@appriseinc.org; 609-454-3777

Presenter(s):
Dan Bausch

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Extra Slides on Using OLDC

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 "LIHEAP Quarterly Performance and Management Report" as the report.

  - Click the plus sign icon under period for the report. For Q1, the period is **10/01/2024 - 12/31/2024** to access the report.

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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				
Report Submissions:	**Report Status:**	**Status Date:**	**Report Action:**	**Print:**
View Original	Submitted	07/31/2019	Unsubmit Report Review	HTML Print Form 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.

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