### WMS Data Entry

#### Case Transaction Type (Screen 1)
- 02-Opening (only on app/tad)
- 03-Denial (only on app/tad)
- 09-Open/Close
- 10-Reopening

#### Undercare Maintenance (Screen 1)
- 05-Change
- 07-Closing (needs a reason code)
- 14-Closed Case Maintenance

#### Case Reason (Screen 1)

#### HEAP Approval Code
- A14-Regular Grant Only (No Funding Available)
- A50-HEAP Approval Benefits Authorized

#### Denial and Closing Reason Codes
- E10-Failure to Keep/Complete Interview
- F01-HEAP Excess Income
- F02-HEAP Previously Applied for/Automatic Payment Received
- F03-HEAP Emergency Denial - Not The Customer of Record
- F04-HEAP Emergency Denial - Not Primary Residence
- F05-HEAP Application Not Complete or Signed
- F06-Ineligible Alien
- F07-Failure to Document Alien Status
- F08-Heap Application Received After Heap Program Year Closing Date.
- G72-Failure to Provide Documentation of Switching to a Participating Vendor
- G75-Not a Resident of District
- H95-Deceased (HH=01 Only)
- M03-Ineligible Living Situation for HEAP
- M04-HEAP Emergency Denial
- M06-Insufficient Information
- M07-Failure to Provide a Valid SSN for Household Member(S)
- M08-HEAP HERR Denial
- W73-Resources Available to Meet Emergency
- W74-Resources Available to Meet HERR
- Y99-Manual Notice

#### Authorization Period (Screen 1)
Cases for the 2016-2017 HEAP Program year may not be authorized on WMS before 08/15/16. The authorization period may not be back dated prior to 10/1/16 and the Authorization "TO DATE" must = 9/30/17. HEAP budgeting changes for the 2016-17 HEAP season will be effective for budgets calculated as of August 22, 2016, with an application date (APP DATE) of 10/1/2016 or later.

#### HEAP Income Level Code (Screen 1)
For federal reporting purposes, a one character field on screen 1 of WMS collects the poverty level income grouping based on household size. The HEAP benefit calculation output screen displays the appropriate HEAP income level code.

#### Social Security Number Codes (Screen 2)
- **1** SSN Present
- **2** SSN Applied For
- **3** 8 SSA Validated SSN
- **4** 9 SSN Failed SSA Validation
- **5** A Validation Failed: SSN Not on SSA File
- **6** B Validation Failed: No Match on Name
- **7** D Validation Failed: No Match on DOB
- **8** E SSA Returned Different SSN
- **9** X SSA Validated SSN/Deceased

#### Relationship Codes (Screen 3)
- 01-Applicant/Payee
- 02-Legal Spouse
- 03-Non-Legal Union
- 04-Son
- 05-Daughter
- 06-Stepson
- 07-Stepdaughter
- 08-Niece/Nephew
- 09-Grandson/Granddaughter
- 10-Grandmother/Grandfather
- 11-Aunt/Uncle
- 12-Essential Person
- 13-Other Eligible Relationship (CT11, 12)
- 14-Other Relationship (Not CT 11, 12)
- 15-Legal Guardian (Not CT 11, 12)
- 16-Ward (Not CT11, 12)
- 17-Cousin
- 18-None
- 19-Parent
- 20-Sister/Brother
- 21-Stepparent
- 22-Stepsis/Stepbrother
- 30-Non-Legal Union, Child in Common

#### Categorical Codes (Screen 3)
- 09-Other, not aged or disabled
- 10-Aged only (over 60)
- 11-Blind/Both Aged and Disabled
- 12-Disabled, Included Blindness

### HEAP Systems Quick Reference Tool

#### Individual Disposition Codes (Screen 5)
- 07-Active
- 10- Ineligible or Sanctioned Incrementally
- 11-Denied
- 13-Deceased
- 15-Deleted
- 20- Case Closed

#### Local Action Codes (Screen 6)
- 1 Check/ATP Issued
- 2 Prepare and Issue Check/ATP
- 4 Release
- 5 Cancel
- 6 Other
- 7 Replacement Check/ATP Issued
- 8 Prepare and Issue Replacement Check/ATP
- 9 Void

#### Payment Type Codes (Screen 6)
- H0-Heating Equipment Repair/Replacement Estimate
- HX-HEAP Regular Benefit Heat Included
- H1-HEAP Regular Benefit Heater
- H2-HEAP Cooling Benefit
- H6-HEAP Emergency Benefit-Shelter/Relocation
- H7-HEAP Emergency Benefit-Replace Heating Equip.
- H8-HEAP Emergency Benefit-Propane Tank Deposit
- H9-HEAP Supplemental Benefit
- J1-HEAP Emergency Benefit-Additional Benefit
- J2-HEAP Reissue Benefit
- J3-Clean & Tune
- J9-HEAP Additional Benefit
- 04-HEAP Emergency Benefit-Non-Utility
- 16-HEAP Emergency Benefit-Domestic Heat-Related Utility
- 17-HEAP Emergency Benefit-Utility

#### Method of Payment Codes (Screen 6)
- 01-Unrestricted
- 02-Vendor as Authorized
- 04-Vendor as Billed Subject to Limit
- 09-Restricted
- 11-Vendor Line of Credit – HEAP

#### Issuance Code (Screen 6)
Must always be 2 – Once only

#### Pick Up Codes (Screen 6)
- 1-Mailed
- 6-Other

#### Special Claiming Code (Screen 6)
H-“HEAP” is required for all HEAP Payment Types

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Revised 9/12/16
HEAP ABEL Budgeting

HEAP Budget
From the WMS Main Menu or Application and Case Inquiry Screen, Hit “F1” to get to the WMS Budget Calculation (ABEL) Menu. Enter Function 10 (for HEAP Budget) & Case # or Reg. #. If HEAP Budget (output) screen is displayed, hit F2-Not Ctrl to change or correct current budget Ctrl/F3-To store budget Ctrl/F5-to go back to ABEL Menu with Case / Reg. Number Retained Ctrl/F6 to go back to ABEL Menu without Case / Reg. Number

WMS ABEL Codes Automated HEAP Benefit Calculation

Case Type 11, 12, 16, 17, 19, 31 & 60

Fuel Type:
- 0 Heat Included
- 1 Natural Gas
- 2 Oil
- 3 PSC Electric
- 4 Coal
- 5 Wood
- 6 Kerosene
- 7 Propane
- 8 Municipal Electric
- 9 Other Fuel

Benefit Type:
- R-Regular
- E-Emergency
- B-Both Regular and Emergency
- D-Dollar ($21) Heat & Eat

Renter’s Benefit Received (RECD)
X-Tier I
W-Tier II
D-$21

Vulnerable (VULN IND):
Y-Yes (denotes a case member as under 6, 60 & over or disabled)
N-No (is used for all other situations)

HEAP Categorical Eligibility Indicator (CE IND):
Y-Yes
N-No

Shelter Types (SHELT TYPE):
Eligible
- 01-Rent Private (Incl. Lot Rent or Commercial Room)
- 02-Rent Public
- 03-Own Home (Incl. Trailer)
- 05-Hotel/Motel Permanent
- 10-Congregate Care Level I-Drug/Alcohol Treatment Facility (Residential Treatment Center)
- 12-Non-Level I Alcohol Treatment Facility (u)
- 13-State Operated Community Residence (FS Only)
- 15-Congregate Care Level I-Family Care
- 16-Congregate Care Level II-Not Drug/Alcohol Treatment or Apartment-like
- 17-Congregate Care Level II-Apartment-like (OMH/OPWDD Supportive/Supervised Apartments)
- 20-Rental Supplement (u)
- 38-Subsidized Housing (Non-Certificate)
- 39-Section 8 Voucher (Up to Agency Max)
- 40-Section 8 Voucher (30% Limit) (Districts 13, 28, 33, 37, 47, 48, 51, 55 & 66 Only)
- 42-Congregate Care Level III-Adult Home and Enriched Housing
- 94-SSI High Shelter, SUA Eligible
- 95-SSI Low Shelter, SUA Eligible
- 96-SSI High Shelter, $21 HEAP/SUA Eligible if HEAP payment received
- 97-SSI Low Shelter, $21 HEAP/SUA Eligible if HEAP payment received
Not Eligible
- 04-Room & Board (PA Only)
- 06-Hotel/Motel Temporary (u)
- 09-Medical Facility ($40 PNA only) (PA Only)
- 11-Non-Commercial Room Only
- 19-Tier II Family Shelter (3 Meals/Day) (u)
- 21-Shelter for Homeless (3 Meals/Day) (u)
- 22-Residential Program for Victims of Domestic Violence (3 Meals/Day) (u)

Not Eligible (Continued)
- 23-Undomiciled
- 33-Houseless Shelter Tier II (Less Than 3 Meals/Day) (u)
- 36-Shelter for Homeless (Less Than 3 Meals/Day) (u)
- 37-Residential Program for Victims of Domestic Violence (Less Than 3 Meals/Day) (u)
- 44-Supportive/Victims of Domestic Violence (District 55 Only) (PA Only)
- 98-SSI Shelter Cost and SUA Unknown

Income Frequency (FRQ):
- W-If paid weekly (ABEL multiplies by 4.33333)
- B-If paid bi-weekly (ABEL multiplies by 2.16666)
- M-If paid monthly
- S-If paid semi-monthly

Last two digits are for cents. Use ‘00’ for whole dollars (i.e. 14500 = $145.00). ABEL doesn’t support decimal points.

Emergency Type:
- A-Heat-Related Domestic
- B-Natural Gas-Heat Only
- C-Natural Gas-Heat & Heat Related Domestic
- D-Electric Heat
- E-Non Utility Fuel
- F-Non Utility Fuel & Heat Related Domestic
- G-Furnace Repair
- H-Propane Reconnect
- I-Furnace Replacement
- K-Municipal Electric Primary Heat Source
- L-Municipal Electric Heat Related Domestic
- M-Relocation
- N-Estimate

HEAP Payment History (Tracking):
From the main menu (Ctrl F6):
Selection 17 or (Ctrl F7 from other screen)
Then enter J
Then Social Security # or CIN #