

## WMS Data Entry

### Case Transaction Type (Screen1)

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 (Screen1)

#### 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  
\*\*\* 8 SSA Validated SSN  
\*\*\* 9 SSN Failed SSA Validation  
\* A Validation Failed: SSN Not on SSA File  
\* B Validation Failed: No Match on Name  
\* D Validation Failed: No Match on DOB  
\* E SSA Returned Different SSN  
\* X SSA Validated SSN/Deceased  
\* System Generated \*\* Worker Entered \*\*\* Can be data-entered or system-generated

### 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-Stepsister/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

### 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  
H5-HEAP Emergency Benefit-Repair Heating Equip.  
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  
O4-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

**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            5 Wood
- 1 Natural Gas              6 Kerosene
- 2 Oil                         7 Propane
- 3 PSC Electric            8 Municipal Electric
- 4 Coal                        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
- 07-Migrant Labor Camp
- 10-Congregate Care Level II-Drug/Alcohol Treatment Facility (Residential Treatment Center)
- 12-Non-Level II 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, 39, 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) (u) (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 Homeless 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/Specialized Housing (District 55 Only) (PA Only)
- 98 SSI Shelter Cost and SUA Unknown

**Income Frequency (FRQ):**

- W-If paid weekly (ABEL multiplies by 4.333333)
- B-If paid bi-weekly (ABEL multiplies by 2.166666)
- 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
- J-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 #