

HEAP Systems Quick Reference Tool

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 – No Scheduled Appointment
- F01 - HEAP Excess Income
- F02 - HEAP Previously Applied for/Automatic Payment Received
- F03 - HEAP Emergency Denial - Not Customer of Record
- F04 - HEAP Emergency Denial - Not Primary Residence
- F05 - HEAP Application Not Complete or Signed
- F06 - Ineligible Non-Citizen
- F07 - Failure to Document Non-Citizen 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)
- H97 - Receiving HEAP in Another Case
- 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
- M09 - HEAP Cooling Assistance Component (CAC) Denial
- M14 - HEAP Clean and Tune Denial
- W73 - Resources Available to Meet an Emergency
- W74 - HEAP Heating Equipment Repair and Replacement Denial - Resources
- Y99 - Manual Notice (Manual Notice Required)

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

Social Security Number Codes (Screen 2) (cont'd)

- * E SSA Returned Different SSN
- * X SSA Validated SSN/Deceased
- * System Generated ** Worker Entered *** Can be data-entered or system-generated

Gender Codes (Screen 3)

- D – Different Identity
- M – Male
- P – Prefer Not to Say
- X – X
- F - Female
- N – Non-Binary
- T – Transgender

Race/Ethnicity Codes (Screen 3)

Race

- I – Native American or Alaskan Native
- A – Asian
- B – Black or African American
- H – Hispanic or Latino
- M – Multi-race (enter Y for every race)
- P – Native Hawaiian or Pacific Islander
- W – White
- O – Other (enter U for every race)

Relationship Codes (Screen 3)

Additional codes can be found on the WMS Code Card Index

- 01 - Applicant/Payee
- 02 - Legal Spouse
- 03 - Non-Legal Union
- 04 - Son
- 05 - Daughter
- 06 - Step-son
- 07 - Step-daughter
- 09 - Grandson/Granddaughter
- 10 - Grandmother/Grandfather
- 13 - Other Eligible Relationship (CT11, 12)
- 14 - Other Relationship (**Not** CT 11, 12)
- 15 - Legal Guardian (**Not** CT 11, 12)
- 19 - Parent
- 30 - Non-Legal Union, Child in Common

Categorical Codes (Screen 3)

- 09 - Single Individual or Childless Couple Age 19-64, (Not Aged or Disabled)
- 10 - Aged only (over 60)
- 11 - Blind/Both Aged and Disabled
- 12 - Disabled, Includes Blindness

Veteran Status Code (Screen 3)

- 1 Special Disability Veterans (Disability of 30% or More)
- 2 Vietnam-era Veteran
- 3 Disabled Veteran
- 4 Combat Theater Veteran
- 5 Recently Separated Veteran
- 6 Other Veteran
- 7 Spouse or Dependent of a Veteran
- 9 Not a Veteran

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
- NX - HEAP Nominal 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 – is required for HEAP Prevention Payments
 G – is required for HEAP Restoration Payments

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 a 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
- C - Cooling

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)
- 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 SSN or CIN