2023- 2024 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)

- HEAP payments may be made for the previous program year (10/01/22 – 09/30/23) and the current program year (10/01/23-09/30/24).
- 2022-2023 previous program year HEAP payments must have a payment line 'TO DATE' equal to 9/30/23.
- 2023-2024 current program year HEAP benefits must have payment line "FROM DATE' equal to or greater than 10/01/23 and must have a payment line 'TO DATE' equal to 9/20/24.

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)
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 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)

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 SSN or CIN