NEW YORK STATE OF OPPORTUNITY. | **Office of Temporary and Disability Assistance**

DATE: June 6, 2018

TO: Subscribers

SUGGESTED DISTRIBUTION: Commissioners, TA and SNAP Directors, HEAP Coordinators, WMS Coordinators, Accounting Supervisors

FROM: Jeffrey Gaskell, Assistant Deputy Commissioner
Employment and Income Support Programs

SUBJECT: 2018-2019 Home Energy Assistance Program (HEAP) TA/SNAP Pre-Autopay Vendor Information Report

EFFECTIVE DATE: Immediately

CONTACT PERSON: HEAP Bureau at: (518) 473-0332

The purpose of this GIS message is to inform social services districts (districts) that in preparation for the 2018-19 HEAP Autopay, OTDA will provide two sets of reports listing potentially eligible Temporary Assistance (TA) and Supplemental Nutrition Assistance Program (SNAP) recipients so Welfare Management System (WMS) vendor information can be reviewed and updated. These reports will be produced for the 2018-19 HEAP program year in June and August.

These reports identify those TA and SNAP recipients that meet the criteria to be included in the Autopay. The reports provide current vendor information and identify those cases missing vendor ID and/or account numbers. An Automated Budgeting and Eligibility Logic (ABEL) flat file will be used to generate these lists.

REPORTS

Each of the two sets of reports will include three reports: **UPSHEAP-D**, **UPSHEAP-V**, and **UPSHEAP-NVD**. The first set is scheduled to be sent to the Benefits Issuance Control System (BICS) queue no later than the week of June 4, 2018. The second set of reports will be sent no later than the week of August 6, 2018.

The reports provide the following information:

- District
- Office/Unit/Worker
- Case name
- Case number
- Fuel type
- Vendor ID
- Customer account number
- TA and or SNAP Auth To Date
- Identification of CO-OP cases

UPSHEAP-D will be sorted by district/office/unit/worker.

UPSHEAP-V will be sorted by district/vendor/office/unit/worker.

UPSHEAP-NVD will be sorted by district/office/unit/worker and will provide districts with a list of cases having no vendor data.

Please contact your BICS operator in order to access and print these reports.

Districts must use these reports to:

- Obtain and verify current Vendor IDs and Customer Account Numbers, and make any needed corrections. Districts **must** send the appropriate sections of the *UPSHEAP-V* report to vendors to assist in verification of account numbers.

- Verify that the vendors listed have Statewide Financial System (SFS) data in the BICS system and are active on the HEAP participating vendor list in their district, and are properly linked to an active SFS vendor ID.

- Review potentially eligible cases in the reports to determine if the TA or SNAP budget correctly reflects HEAP status; i.e., correct shelter, fuel types and Standard Utility Allowance (SUA) indicator(s).

TA/SNAP PRE-AUTOPAY REQUEST FOR VENDOR INFORMATION

The attached **TA/SNAP PRE-AUTOPAY REQUEST FOR VENDOR INFORMATION** outreach tool may be reproduced locally and mailed out to recipients based on the Pre-Autopay Report. Districts may choose a return date to accommodate local processes.

ENTRY OF INFORMATION

Vendor ID and Account data should be entered in the HVnd/Acct fields ("Occurrence 1") on WMS screen 06 prior to the Mass Authorization. Active cases not in Pending status at the time of the run will be evaluated in the Autopay. The Autopay is scheduled for September 8, 2018, (TA cases) and September 15, 2018, (SNAP cases).

Note: For record keeping purposes, and to facilitate the use of the correct billing procedures, many utilities assign new account numbers to TA recipient households on direct voucher or utility guarantee. It is recommended that districts look specifically at these accounts to ensure that the correct account number is being used.

SFS VENDOR DATA

Districts must print and review the SFS Vendor Processing Report (print file: *SFSVENREPORT*), and update SFS vendor data in BICS, if necessary. Use selection 05, Vendor Operations, from the LDMIP Menu to access BICS vendor data.

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PARTICIPATING VENDOR LISTING

Districts must review the vendors listed in the reports against the HEAP Participating Vendor List on Centraport to verify the vendor's participation status and the presence of a local vendor ID. If a vendor is not on the HEAP Participating Vendor List **or** does not have a local vendor ID listed, districts should provide that information to their HEAP Bureau liaison for updating.

Please contact your HEAP Bureau liaison at: (518) 473-0332 with any questions.

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2018-19 HOME ENERGY ASSISTANCE PROGRAM
TA/SNAP PREAUTOPAY REQUEST FOR VENDOR INFORMATION

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<INSERT MAIL OUT DATE>
<INSERT LOCAL DISTRICT NAME, ADDRESS AND PHONE NUMBER>

<INSERT RECIPIENT NAME, ADDRESS AND CASE NUMBER>

Dear Temporary Assistance (TA) or Supplemental Nutrition Assistance Program (SNAP) Recipient:

In preparation for the 2018-19 Home Energy Assistance Program (HEAP), we need updated information about your heating situation.

Please call the number listed at the top of this letter if you have any questions.

Please answer the questions below and return this form NO LATER THAN *<insert return date>*, to the address above. If you pay for heat, ENCLOSE A COPY OF YOUR MOST RECENT BILL.

Daytime phone number _____ Best time to be contacted _____

What is your current heating situation? Please select one of the three options listed below.

☐   **1. My heat is included in my rent.**

    Do you live in subsidized housing?   ☐ YES ☐ NO
    If yes, do you receive a HUD utility allowance? ☐ YES ☐ NO If yes, how much? _____

    Do you pay an electric bill?   ☐ YES ☐ NO
    If yes, enter your electric company's name and your account number:
        Company Name _____
        Account Number _____

    Is the electric bill in your name?   ☐ YES ☐ NO
    If no, enter the name on the bill _____

☐   **2. I live in someone else's household, rent a room, or live in a hotel/motel**

☐   **3. I pay for heat directly to a vendor.**

    Is the bill in your name?   ☐ YES ☐ NO
    If no, enter the name on the bill _____

    What is your **main type** of heat? ☐ Natural Gas ☐ Electric ☐ Propane ☐ Oil
                                ☐ Kerosene   ☐ Coal   ☐ Wood or Wood Pellets
                                ☐ Other, list fuel type _____

    For your main type of heat checked above, list your vendor's name and address, and your
    account number:
        Company Name _____
        Address   _____
        Account Number _____

    If you heat with oil or kerosene, do you have a written service contract? ☐ YES ☐ NO