

EMERGENCY WORKSHEET INSTRUCTIONS

All applicable sections of the Worksheet must be completed to fully document a Household's heating situation, determine if they are in an Energy or Life Threatening Crisis and determine the actions taken by the CAA to avert a crisis within the required timeframe.

To meet federal reporting requirements the CAA must assess the Household's Home Energy status at the time of Application by fully completing the Home Energy Status section of Worksheet.

1. General Information

- 1.1. CAA (agency name)
- 1.2. Primary Applicant Name
- 1.3. Phone (Primary Applicant)
- 1.4. HEAP Client Number
- 1.5. Create/Intake Date
- 1.6. Date of Emergency request
- 1.7. Time of Emergency request

2. Status of Home Energy Service

- 2.1. Is the Household disconnected (e.g. electricity, natural gas)?
- 2.2. Does Household have a past due or shut-off notice?
- 2.3. Determine what (if anything) the Household is using for heat. How is the household staying warm?
 - 2.3.1. Does the Household have an operable Heating System or Heating Source? Check "yes" if the Household has an operating Heating Source, such as a portable space heater, or an operating Heating System.
 - 2.3.1.1. Operable means the Heating System or Heating Source is safe to operate and there is a supply of Home Energy for the Heating System or Heating Source.
 - 2.3.1.2. "Heating System" means a permanently installed system that is used to heat the Dwelling Unit. A portable space heater is not considered to be a Heating System.
 - 2.3.1.3. "Heating Source" means **any device** used to provide heat to a Dwelling Unit.

EXAMPLES:	Does household have an operable Heating System or Heating Source?
Has electric space heater and electric service (i.e. has not been disconnected).	Yes. Household has an operable Heating Source.
Oil furnace not working. Has wood stove and firewood on hand.	Yes. Household has an operable Heating System.
Oil furnace not working. Has a wood pellet stove, but is out of wood pellets. Does not have any other Heating Sources or Heating Systems.	No. Household is out of wood pellets; therefore, does not have an operating Heating System. There are no operable Heating Sources or Heating Systems in the home.

- 2.4. Complete the table to document information about **permanently installed Heating Systems**.
 - 2.4.1. How much fuel does the Household currently have for their primary, secondary, and any other Heating Systems?
Indicate the amount of fuel by checking the appropriate box/column for each Heating System.
 - 2.4.2. Heats **X % of home**: Estimate the heating capacity of each Heating System by asking the Applicant how many rooms the Heating System heats.
Example: Applicant says the wood stove heats two rooms; home has 4 rooms. The wood stove heats 50% of the home.
- 2.5. Is the Household on autofill?
- 2.6. If yes, Household is on autofill, when is the next scheduled automatic delivery?

3. Type of Crisis

Check/select the appropriate box (i.e. **Energy Crisis** or **Life Threatening Crisis**)

Type of Crisis:	Check if Household:	Crisis must be averted within:
Energy Crisis	Has Heating Source or Heating System that is safe to operate, and a supply of Home Energy for the Heating Source or Heating System.	48 hours of certification
Life Threatening Crisis	Does not have an operable Heating Source or Heating System, includes no Home Energy situations.	18 hours of certification

NOTE: Use of the **Provisional Worksheet** is required when using Space Heaters, or Temporary Relocation measures to address crisis situations.

4. Fuel Emergency: Complete this section if the Applicant is experiencing a fuel emergency.

Ask the Applicant for information about their primary and secondary Heating Systems. The CAA will verify last delivery information with the applicable Vendor(s).

- 4.1. Date of last delivery
- 4.2. # Units delivered
- 4.3. Fill (Did last delivery fill tank?)
- 4.4. Vendor Name (last delivery)
Indicate the name of the Vendor who made the last delivery for the primary and secondary fuel types. If the last delivery was made by a HEAP Vendor, call the Vendor to confirm the information provided by the Applicant.
- 4.5. Amount of Fuel Available: Enter the amount of Fuel left in tank for Primary and Secondary
- 4.6. Tank Size
Enter whether an Upfront or ECIP will remedy the emergency. If the CAA is to authorize an Upfront, see Upfront Delivery Request Instructions and Form.
- 4.7. Vendor Delivering Emergency Fuel
Name of Vendor who will make the Emergency delivery
- 4.8. Fuel Type
Indicate the type of fuel being delivered
- 4.9. Wood Type (if applicable). Indicate the size and type of wood requested.
- 4.10. **HEAP Balance:** Any HEAP funds remaining on an Applicant's fuel account **must** be used in lieu of or in conjunction with the ECIP.
Balance: Call the Applicant's HEAP Vendor to confirm the amount of any remaining HEAP funds on their account. Enter the amount of any HEAP balance in the table. If no funds remain, **must** enter 0.
Cash Price: Ask the Vendor to confirm the Cash price per unit and enter it in the table.
Units: The table will calculate/auto-populate the number of units that will be covered by the remaining HEAP funds.
- 4.11. **TANF Supplemental Balance:** Any remaining TANF Supplemental Benefit credits on an Applicant's fuel account must be used in lieu of or in conjunction with the ECIP.

Balance: To determine the amount of any remaining TANF Supplemental Benefit credits:

- Review HEAP Cloud, which indicates the date a \$300.00 credit was issued to the Vendor and the amount MaineHousing has paid to the Vendor for any deliveries made against the TANF Supplemental Benefit credit, if applicable.
- CAA will need to ask the Vendor to confirm the TANF Supplemental credit balance remaining. Does the Vendor have outstanding invoices that have not been submitted to or paid by MaineHousing?
- Enter the amount of any TANF Supplemental balance in the table. If no credits/funds remain, **must** enter 0.

Cash Price: Ask the Vendor to confirm the cash price per unit and enter it in the table.

Units: The table will calculate/auto-populate the number units that will be covered by the remaining TANF Supplemental credits.

- 4.12. **ECIP:** When determining the ECIP benefit amount, the CAA must take into account the amount of any remaining HEAP Benefits and/or TANF Supplemental credits on the Household's fuel account with the Vendor. Any remaining HEAP Benefits and/or TANF Supplemental credits must be exhausted – i.e. used to cover part or all of the emergency Home Energy delivery.

Cash Price: Ask the Vendor to confirm the cash price per unit and enter it in the table.

Units: The number of ECIP units being purchased. Remember any units being purchased with remaining HEAP and/or TANF Supplemental funds must be deducted.

Delivery/Service: Ask the Vendor if there will be a delivery or restart charge for the ECIP. If the applicant has indicated their fuel tank is on empty the Vendor may have to restart the system or in the case of LP Gas a system safety check may be required.

Example: Household's approved fuel type is oil.

Verifications/Considerations:

- Household has not received any ECIP benefits in PY2024.
- Household has not received TANF Supplemental Benefits.
- Vendor's cash price is \$3.10 per gallon.
- Applicant has a HEAP credit balance of \$98.00. Vendor's cash price is \$3.10 per gallon. HEAP will cover 31.613 gallons.
- The total amount of the emergency delivery would be at the CAA's discretion.+ Options:
1.) 100 gallons (31.613 funded by HEAP and 68.387 gallons funded by ECIP) **or**
2.) Emergency delivery of up to \$800.00 (HEAP \$98.00 + ECIP \$702.00).
- An emergency delivery of 100 gallons will be covered by:
 - HEAP: 31.613 gallons
 - ECIP: 68.387 gallons
- There will be a \$100.00 restart/service charge.
- CAA enters the cash price, units, and service charge into the table on Worksheet. The ECIP PO Amount will be auto-filled/auto-calculated.

	Cash Price x Units + Delivery/Service = ECIP PO Amount			
ECIP	\$3.10	68.687	\$100	\$337.93*

* DOES NOT include the dollar amount being paid by the HEAP balance.

- 4.13. **ECIP PO #**

Enter the PO # generated from HEAP Cloud PO number.

- 4.14. **Date/time certified**

This is the date and time the ECIP was certified and the PO generated in HEAP Cloud.

5. Non-Contracted Vendor: Complete this section if one of the following is applicable:

5.1.1. CAA is unable to find a contracted HEAP Vendor.

5.1.2. Household's Requested Fuel Type is wood.

5.1.3. Heating System vendor is not contracted

5.2. Name of non-contracted vendor completing the emergency delivery.

5.3. Address of the non-contracted vendor.

5.4. Phone number of the non-contracted vendor.

5.5. Fax number of the non-contracted vendor.

5.6. Email Address of the non-contracted vendor.

5.7. Name of the contact person spoken with at the non-contracted vendor company.

6. Utility Disconnect (electricity or natural gas): ECIP can be used for electricity and natural gas disconnection only if the Household's Heating System requires electricity or natural gas for operation.

6.1. Name of the utility vendor

6.2. Name on Account

6.3. Account Number

6.4. Date of disconnection

6.5. Amount of disconnection

6.6. Check the applicable factors:

6.6.1. Heating will fail

6.6.2. In a payment arrangement

6.6.3. Broken payment arrangement

6.6.4. Has the ability to pay

6.6.5. ECIP will remedy

6.7. ECIP PO amount approved

6.8. ECIP PO #

6.9. Date/time certified.

This is the date and time the ECIP was certified and the PO generated.

7. Heating System Emergency: ECIP can be used for emergency repairs to the Primary Heating System when it's inoperable or unsafe.

7.1. System Vendor

The contracted vendor approved to make the system repairs.

7.2. Check the appropriate box describing the condition of the Heating System.

7.3. Clean, Tune and Evaluate (CTE) Amount

7.4. Repair Amount

In most instances the vendor will not know what is wrong with the heating system therefore, they would not know the cost of repair. The CAA should take into account the amount of ECIP funds available and approve the purchase order for that amount.

Example: Applicant's oil furnace is not working, the applicant confirmed the tank gage is reading ½ tank. There are no other Heating Systems installed in the home and there are no Heating Sources available. The Vendor is unable to make a service call until the next afternoon. The CAA will:

1) Approve a purchase order and provide a space heater at a cost of \$98.63.

2) Approve and issue a Heating System Emergency purchase order for: \$701.37.

- 7.5. ECIP PO Amount approved
This is the total cost (CTE + Repair Amount).
- 7.6. ECIP PO #
- 7.7. Date/time certified
This is the date and time the ECIP was certified.

NOTE: Check the Provisional Measures Box on the Emergency Worksheet and complete the **Provisional Worksheet** when using Space Heaters, or Temporary Relocation measures to address crisis situations.

8. Space Heaters: ECIP can be used to purchase space heaters when the crisis cannot be resolved by a Home Energy delivery or Heating System repair within the required 18 or 48 hour timeframe.

- 8.1. Type of emergency: Check which type of emergency is being temporarily averted, fuel emergency or Heating System emergency.
- 8.2. Date fuel delivery or service will occur
What date will the fuel delivery be made or Heating System repaired?
- 8.3. Number of space heater(s)
How many space heaters are being provided?
There may be times when more than one space heater would be appropriate to keep the room at a reasonable temperature.
- 8.4. Model Number(s)
- 8.5. ECIP PO Amount
- 8.6. ECIP PO #
- 8.7. Date/time certified
This is the date and time the ECIP was certified.
- 8.8. Date/time space heater(s) provided
When did the Applicant take possession of the space heater(s)?

9. Temporary Relocation: ECIP can be used to provide temporary relocation if the Eligible Household is experiencing a Life Threatening Crisis when the crisis cannot be resolved within the required 18 hour timeframe.

- 9.1. Check which type of emergency is being temporarily averted, fuel emergency or Heating System emergency.
- 9.2. Date fuel delivery or service will occur
What date will the fuel be delivered or Heating System repaired?
- 9.3. Name of the hotel/motel and location
- 9.4. Reservation #
This number will be provided by the hotel/motel.
- 9.5. Number of rooms
In certain situations an Eligible Household may need more than one room to accommodate the Household composition.

Example 1: If the Eligible Household is a family of 8. This may require 2 rooms.

Example 2: If the Eligible Household is comprised of roommates who are not related. They may want two separate rooms.

- 9.6. Expected check-in date
- 9.7. Expected check-out date
- 9.8. ECIP PO Amount
- 9.9. ECIP PO #
- 9.10. Date/time certified

This is the date and time the ECIP was certified.

10. Case Notes: This area can be used to document information pertinent to the ECIP instance.

Example 1: No HEAP remaining on account. Called HEAP Vendor, ABC Oil; they will make the emergency delivery within 18 hours with a \$125.00 delivery fee. Called Best Oil who agreed to make the delivery within 18 hours with no delivery fee.

Example 2: Called Applicant's fuel Vendor, confirmed the applicant has a HEAP credit balance of \$87.00. The Vendor is unable to make the emergency delivery within the required timeframe. Best Oil was contacted and it was confirmed they can make the delivery within the required timeframe.

11. Intake/Certification

11.1 The intake worker and certifier must sign and date the form.

The ECIP worksheet must indicate all methods used to avert the immediate energy crisis.

It would be appropriate in some cases to use two separate measures to resolve the situation. This would require the intake worker and certifier signatures and date for each measure used to resolve the emergency.

Example: The Household is out of fuel and has no heat. The CAA is unable to find a fuel company that can make an emergency delivery within 18 hours. The Applicant's Vendor can deliver within 48 hours. The CAA will:

1. Approve and issue a purchase order for the fuel delivery.
2. Approve and issue space heaters to the Applicant.