

**DSS ADMINISTRATIVE LETTER NO. PERFORMANCE
MANAGEMENT/REPORTING AND EVALUATION MANAGEMENT 03-2011
Instructions for the New Energy Programs System (November 16, 2011)**

TO: County Directors of Social Services
County Security Officers
Crisis Intervention Program (CIP) Users
LIEAP Staff

DATE: November 16, 2011

SUBJECT: Instructions for the New Energy Programs System

I. BACKGROUND

House Bill 57 requires the Low Income Energy Assistance Program (LIEAP) payments to be direct vendor payments effective 12/1/2011. LIEAP data must be entered by counties via the Crisis Intervention Program (CIP) system, using a different funding source, and new/different application and notices. The current CIP system has been renamed to the Energy Programs Systems and will now house both CIP and LIEAP data. The old EP01 (LIEAP System) will be available for inquiry only for prior years' data.

The LIEAP program will run beginning December 1st until March 31st of each year. Counties will be able to access their funding through Funding Authorizations issued and tracked within the County Administration Reimbursement System (CARS). Once county funding has been exhausted no additional funds will be available. Money remaining after the LIEAP program ends on March 31st will be carried forward to the next year.

Screens for the new LIEAP program will include the same fields as CIP and will also have the addition of a new Account Number field, a new DAAS indicator, and a new Resources field. Reports will no longer be available thru NCXPTR—they are located within Energy Programs (REPORTS tab) and in CSDW. The paper DSS-8114 application has been obsoleted as LIEAP applications will now be entered online via the Energy Programs system. A one time vendor payment of \$200 or \$400 (depending on the Fuel Type) per fiscal year will be issued and clients will no longer receive the check in February. The new LIEAP program will have the capability for adjustments to be made (currently available for CIP cases).

The training site will be available beginning Thursday, November 17, 2011. Please be aware that you may find some things not working correctly because this project is still in user acceptance testing. However, we felt the need to get it moved to the training site as soon as possible to allow counties time to get familiar with the new screens.

Please follow the instructions below for the **training site only**. These instructions will be obsolete when the new Energy Programs System goes live on 12/01/2011 and the online manual material has been published to the website.

II. LOG ON/OFF INSTRUCTIONS

A. Log On Procedures

1. To log on to the new Energy Programs System training site, go to the website address:

https://ciptest.dhhs.state.nc.us/cip_training/signonscreen.asp .

2. Enter the County Name followed by the word “train” as the User ID. The password is the County Name.

Contact your local Security Officer regarding any problems accessing this site.

B. Log Off Procedures

To log off the system, choose the “Log Off” selection at the top of the screen. The user will be exited from the system.

III. USER INSTRUCTIONS

Detailed instructions with screen shots are attached to this Administrative Letter.

If you have any questions, please contact the Information Support Unit at (919) 733-8938.

Sincerely,



Hank Bowers, Chief
Performance Management/
Reporting & Evaluation Management

HB:kb

PM-REM-AL-03-2011

Attachment

New Energy Programs Systems Training Instructions for LIEAP November 17, 2011

I. Accessing the Energy Programs Systems Training Website

A. Log On Procedures

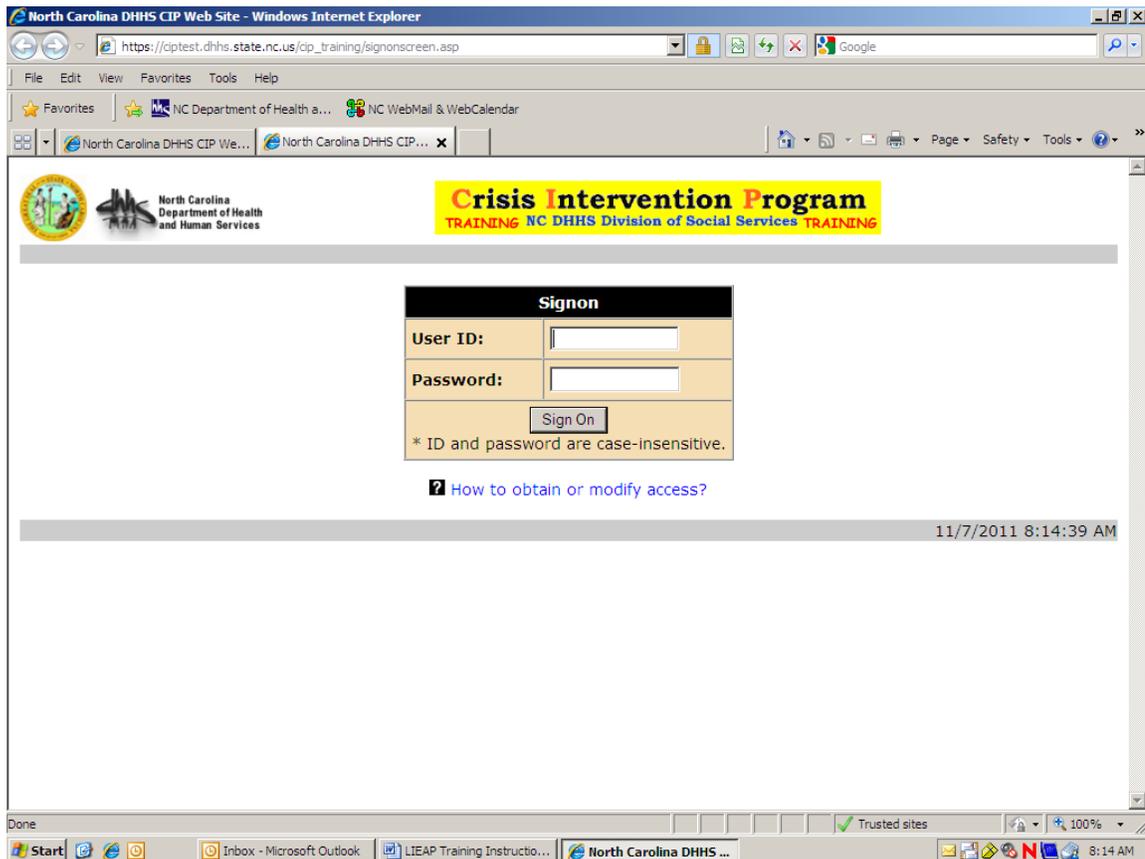
1. To log on to the new Energy Programs System training site, go to the website address:

The website still refers to this system as CIP. The name will be updated to Energy Programs prior to 12/1/2011.

https://ciptest.dhhs.state.nc.us/cip_training/signonscreen.asp .

2. Enter the County Name followed by the word “train” as the User ID. The password is the County Name.

Contact your local Security Officer regarding any problems accessing this site.

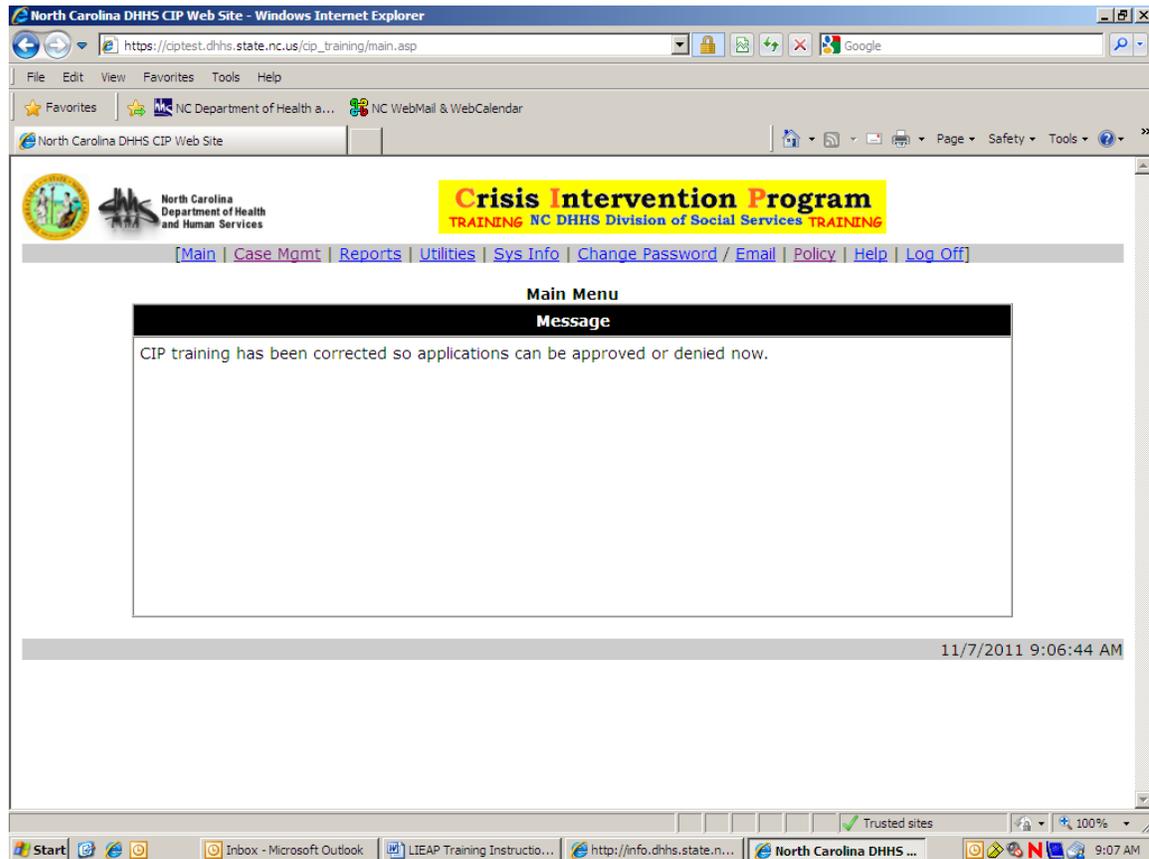


B. Log Off Procedures

To log off the system, choose the “Log Off” selection at the top of the screen. The user will be exited from the system.

II. Main Menu

Once logged in, the Main Menu appears:



A. Tabs Across the Top

Access to different functions is obtained by selecting a tab on the gray toolbar (i.e., CASE MGMT tab, REPORTS tab, etc.) at the top of the Main Menu screen (see above). Each screen contains navigation buttons with options shown below. Clicking on an option takes a user directly to that screen.

Note: Depending on the user's access privileges, some of the Main Menu options may not be available.

1. **CASE MGMT** tab contains all CIP cases and allows for entry of new CIP/LIEAP applications.
2. **REPORTS** tab is used to retrieve reports.

3. **UTILITIES** tab is where adjustments (refunds from vendors) are entered using Application Adjustments Corrections.
4. **EMAIL** tab is used to enter your email address to receive messages.
5. **POLICY** tab provides access to the online policy manual.

The **POLICY** tab currently refers users to the CIP online manual (for both CIP and LIEAP) until the LIEAP online manual section is completed and posted to the web.

6. **LOG OFF** is used to log off. It is also used for those employees who key for more than one county and need to log off as one USER ID and log back on with another USER ID.

B. Search Fields

Select the **CASE MGMT** tab to display the Energy Programs (EP) Case Search screen and enter the following:

The screenshot shows a web browser window titled "North Carolina DHHS CIP Web Site - Windows Internet Explorer". The address bar shows the URL: https://cip.test.dhhs.state.nc.us/cip_test/request.asp?task=GO. The page content includes the North Carolina Department of Health and Human Services logo, a yellow banner for "Energy Programs" with "TEST NC DHHS Division of Social Services TEST" below it, and a navigation menu with links: [Main | Case Mgmt | Reports | Utilities | Sys Info | Change Password / Email | Policy | Help | Log Off].

The main form is titled "EP Case Search" and contains the following fields:

EP Case #:	<input type="text"/>		
SSN:	<input type="text"/>	Birth Date:	<input type="text"/>
First Name:	<input type="text"/>	Last Name:	<input type="text"/>
Note: Entering "Don" will return "Don", "Donna", "Donald" etc.		Note: Same as left.	
Maximum List Limit:	<input type="text" value="20"/> (Max : 100)		
<input type="button" value="List"/>			

Below the form is a link: [How to search?](#)

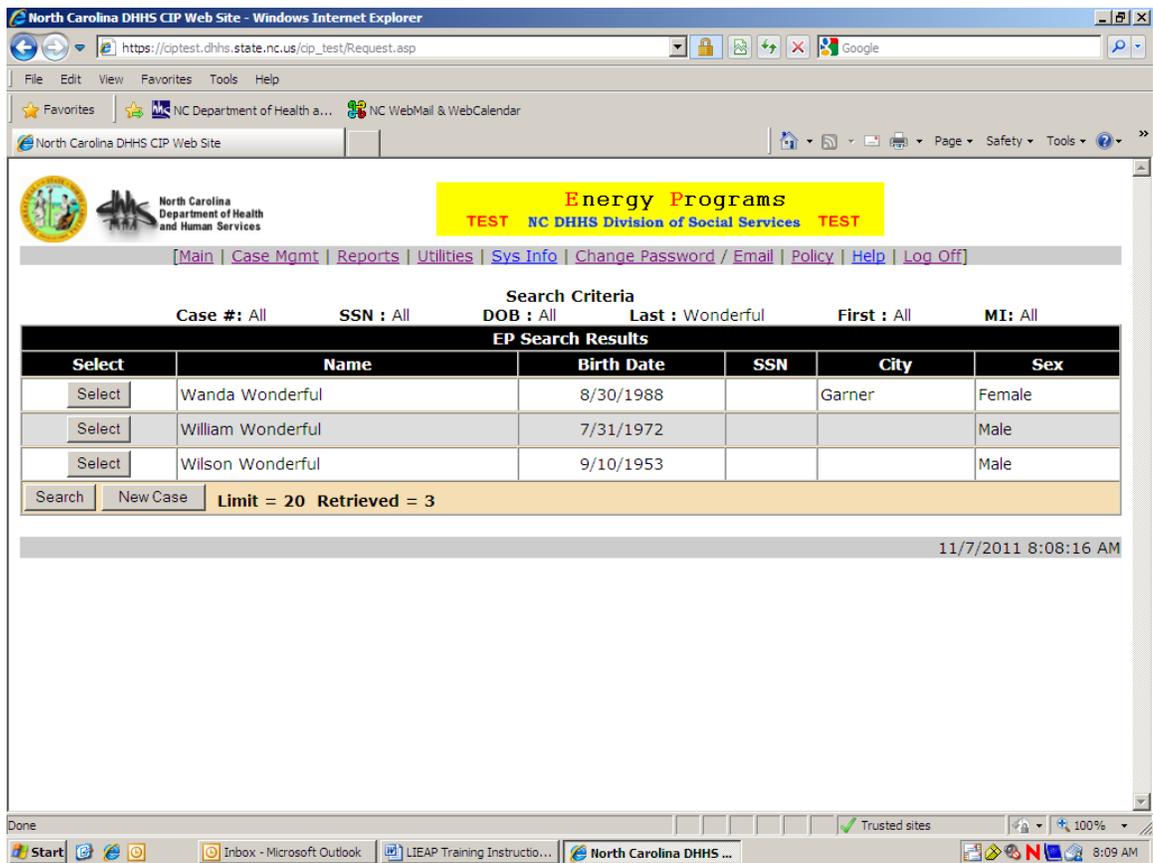
The bottom right corner of the page shows the date and time: 11/4/2011 2:06:28 PM.

1. **EP Case #:** (System Assigned) A full case number may be entered to find a case.
2. **SSN:** Social Security Number
 - a. 9-digit SSN must be entered. (If the individual does not have an SSN, zeros must be entered.)

- b. Hyphens (-) are optional.
 - c. The input is automatically formatted when tabbing to another field.
3. Birth Date:
- a. Requires a complete date entry in mmddccyy, mm/dd/ccyy or mm-dd-ccyy format.
 - b. The input is automatically formatted when tabbing to another field.
 - c. First Name (up to 20 characters)
 - d. Last Name (up to 20 characters)
 - e. Maximum List Limit: Maximum number of cases returned in EP Case List. The maximum number of cases that can be returned at any one time is 100. There is no minimum.

It is required to enter the SSN number for each member of the household and to perform a name search prior to entering new cases or applications to prevent duplication of cases and benefits.

C. EP Search Results Screen



Individuals found by the search are displayed in the EP Search Results screen. A search on a name, or partial name, will return everyone in the EP System who matches the criteria entered. For example, a search on Rob Smith will return Rob

Smith, Rob Smithy, Robert Smith, Roberta Smith, etc. The results will also show all Rob Smiths in the system with different dates of birth and social security numbers.

1. Review the results on this screen. If the individual needed does not appear in the results, you must search again by the individual's social security number and/or name and date of birth.
2. If the individual has not received benefits in the EP System, click on NEW CASE to set up a new EP case for this individual.
3. If the individual does appear in the results, click on SELECT by his/her name to proceed to the EP Individual List screen.

D. EP Individual List Screen

North Carolina DHHS CIP Web Site - Windows Internet Explorer

https://cip.test.dhhs.state.nc.us/cip_test/Request.asp

North Carolina Department of Health and Human Services

Energy Programs
TEST NC DHHS Division of Social Services TEST

[Main | Case Mgmt | Reports | Utilities | Sys Info | Change Password / Email | Policy | Help | Log Off]

Search Criteria
SSN : All DOB : 9/10/1953 Last : Wonderful First : Wilson

EP Individual List								
Case	App.	Case#	App.#	Name	Birth Date	SSN	City	Sex
View	List	50448643	31154257	Wilson Wonderful	9/10/1953			Male

Search Limit = 20 Retrieved = 1

11/7/2011 8:10:21 AM

1. The EP Individual List screen lists cases and applications in which the person selected on the EP Search Results screen has received benefits or made an application. (The most recent case/application is at the top.)
2. Click on VIEW beside the individual's name to view case information about that individual such as SSN, DOB, Address, etc.
3. Click on LIST beside any application number to proceed to the Application List screen to view the details of that application.

E. VIEW EP Case Screen

The screenshot shows a web browser window displaying the 'VIEW EP Case' screen. The page header includes the North Carolina Department of Health and Human Services logo and the text 'Energy Programs TEST NC DHHS Division of Social Services TEST'. A navigation menu contains links for Main, Case Mgmt, Reports, Utilities, Sys Info, Change Password, Email, Policy, Help, and Log Off. The main content area is a table with the following information:

VIEW EP Case					
Case #:	50448643	SSN:		DOB:	8/30/1988
Name:	(First,MI,Last,Suffix) Wanda Wonderful				
Gender:	Female	Ethnicity:	U - Unreported		
Race:	American Indian or Alaska Native:	No	Asian:	No	
	Native Hawaiian or Other Pacific Islander:	No	White:	Yes	
	Black or African American:	No	Unreported:	No	
Language:	EN - English				
Disabled:	No				
Address:	1340 Big Oak Drive Garner NC 27529			Phone:	919-303-3333
[Search Case List Edit Case Application List]					

The date and time '11/7/2011 8:11:57 AM' are displayed at the bottom right of the page content. The browser's taskbar shows the Start button, Internet Explorer, Microsoft Outlook, LIEAP Training Instructo..., and North Carolina DHHS ...

1. The case information is displayed for the individual selected.
2. The case can be edited using Edit Case.
3. Application List will display information for the application(s) associated with the case, and includes the status and the Funding Type for each application.
4. Case List returns you to the EP Search Results screen.
5. Search returns you to the EP Case Search screen.

F. EP Application List Screen

North Carolina DHHS CIP Web Site - Windows Internet Explorer

https://cip.test.dhhs.state.nc.us/cip_test/Request.asp

North Carolina Department of Health and Human Services

Energy Programs
TEST NC DHHS Division of Social Services TEST

[Main | Case Mgmt | Reports | Utilities | Sys Info | Change Password / Email | Policy | Help | Log Off]

Case ID: # 50448643

EP Application List									
App.	App. #	Case #	Funding Type	Head of Household	County	Date of Application	Status	Amt Requested	Amt Approved
View	31154257	50448643	Lieap Funding	Wanda Wonderful	Wake	11/2/2011	Pending	\$0.00	
View	31154256	50448643	Wake Electric Round Up	Wanda Wonderful	Wake	11/1/2011	Denied	\$200.00	

Search Case List New CIP Application New LIEAP Application Retrieved = 2

11/7/2011 8:12:45 AM

1. The EP Application List screen lists all the applications associated with a case, and include the status and Funding Type for each application.
 - a. Status is approved, denied, or pending.
 - b. Funding Type is listed for each application.
2. New CIP Application allows you to key a new CIP application.
3. New LIEAP Application allows you to key a new LIEAP application.

If there is already an approved LIEAP application for the current fiscal year, there will not be a New LIEAP Application button.

4. Select View (Under App.) to view information for an application. Either a VIEW Application screen (for CIP application) or a VIEW LIEAP Application screen (for LIEAP application) is displayed depending on the Funding Type listed.

III. Entering a New Case

A. New EP Case Screen

Once a name search has been performed for each member of the household and it is determined a new case needs to be entered, select New Case (from the EP Search Results screen).

The screenshot shows a web browser window displaying the 'NEW EP Case' form on the North Carolina DHHS CIP Web Site. The form is titled 'NEW EP Case' and contains the following fields and values:

Case #:	*** New ***	SSN:	010-10-1111	DOB:	09/08/1950 *
Name:	(First,MI,Last,Suffix)	Wanda *	Wonderful *		
Gender:	Female *	Ethnicity:	U - Unreported *		
Race: (* Select one or more that apply)		American Indian or Alaska Native:	<input type="checkbox"/>	Asian:	<input type="checkbox"/>
		Native Hawaiian or Other Pacific Islander:	<input type="checkbox"/>	White:	<input checked="" type="checkbox"/>
		Black or African American:	<input type="checkbox"/>	Unreported:	<input type="checkbox"/>
Language:	EN - English *				
Disabled:	<input type="checkbox"/>				
Address:	Address 1: 410 Penny Lane *			Phone:	919-303-8111
	Address 2:				
	City: Gamer * State: NC * Zip: 27529 *				

Buttons: Add Case, Cancel

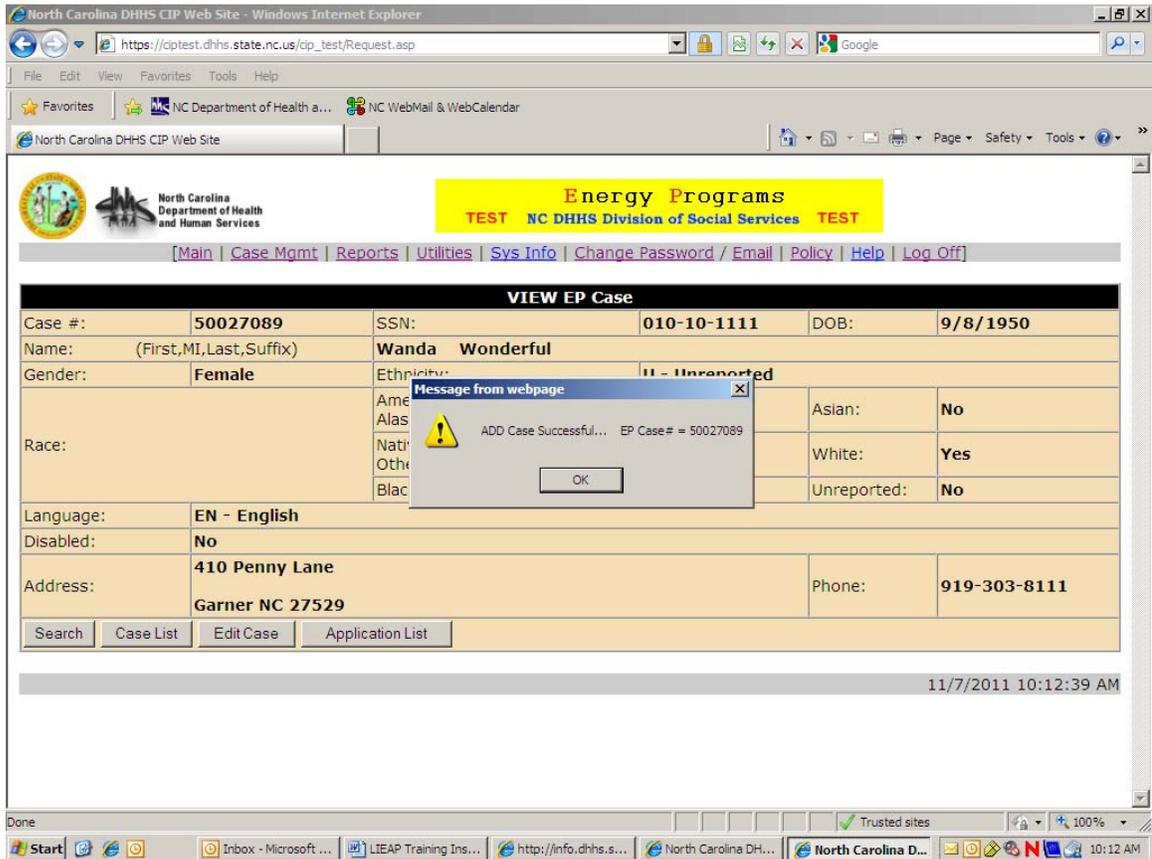
Timestamp: 11/7/2011 9:45:05 AM

Keying Instructions:

- Required fields are indicated with red asterisks.
- SSN requires entry for the head of household.
- Key information for each field and tab to the next field. Some fields have a drop-down menu (i.e., Gender and Language fields). Clicking on the drop-down allows you to make a selection with your cursor.

The system automatically inserts dashes for SSN and phone number and slashes for DOB once you tab to the next field.

- After keying all the case information, select Add Case.
- The message "ADD Case Successful" is displayed along with the case #.



B. VIEW EP Case Screen

The following navigation buttons will be displayed on the bottom of the screen:

1. **Search** returns you to the EP Case Search screen.
2. **Case List** returns you to EP Search Results screen.
3. **Edit Case** can be used to make corrections.
4. **Application List** takes you to the EP Application List screen where you will key the new application.

C. EP Application List Screen

Select the New CIP/New LIEAP Application button to display a New CIP/New LIEAP Application screen.

The screenshot shows a web browser window titled "North Carolina DHHS CIP Web Site - Windows Internet Explorer". The address bar shows the URL "https://ciptest.dhhs.state.nc.us/cip_test/Request.asp". The page content includes the North Carolina Department of Health and Human Services logo, a yellow banner for "Energy Programs" with "TEST NC DHHS Division of Social Services TEST" below it, and a navigation menu with links like "Main", "Case Mgmt", "Reports", "Utilities", "Sys Info", "Change Password / Email", "Policy", "Help", and "Log Off". Below the navigation menu, the text "Case ID: # 50027089" is displayed. The main content area features a table titled "EP Application List" with the following columns: "App.", "App. #", "Case #", "Funding Type", "Head of Household", "County", "Date of Application", "Status", "Amt Requested", and "Amt Approved". Below the table, there are buttons for "Search", "Case List", "New CIP Application", and "New LIEAP Application", followed by the text "Retrieved = 0". The page footer shows the date and time "11/7/2011 10:23:31 AM". The Windows taskbar at the bottom shows the Start button and several open applications, including "Inbox - Microsoft...", "LIEAP Training Ins...", "http://info.dhhs.s...", "North Carolina DH...", and "North Carolina D...".

North Carolina DHHS CIP Web Site - Windows Internet Explorer
https://ciptest.dhhs.state.nc.us/cip_test/Request.asp

North Carolina Department of Health and Human Services

Energy Programs
TEST NC DHHS Division of Social Services TEST

[Main | Case Mgmt | Reports | Utilities | Sys Info | Change Password / Email | Policy | Help | Log Off]

Case ID: # 50027089

EP Application List										
App.	App. #	Case #	Funding Type	Head of Household	County	Date of Application	Status	Amt Requested	Amt Approved	
Search	Case List	New CIP Application	New LIEAP Application	Retrieved = 0						

11/7/2011 10:23:31 AM

D. NEW LIEAP Application Screen

North Carolina DHHS CIP Web Site - Windows Internet Explorer

https://cip.test.dhhs.state.nc.us/cip_test/requestLieap.asp

North Carolina DHHS CIP Web Site

Energy Programs
TEST NC DHHS Division of Social Services TEST

[Main | Case Mgmt | Reports | Utilities | Sys Info | Change Password / Email | Policy | Help | Log Off]

How to enter a new EP application form?

NEW LIEAP Application			
Application #:	*** New ***	Date of Application:	11/7/2011 *
Status:	Pending	Status Date:	11/7/2011
Denied Reason:		Fuel Type:	<input type="text"/>
County:	Rowan	County Case#:	<input type="text"/>
Assistance Type:	Heat	Worker/ District:	<input type="text"/>
Funding Type:	LIEAP FUNDING	DAAS:	<input type="radio"/> Yes <input type="radio"/> No *
Head of Household			
Case #:	50027089	SSN:	010-10-1111
Name:	(First,MI,Last,Suffix)	Wanda *	Wonderful *
Gender:	Female *	Ethnicity:	U - Unreported *
Race:	(* Select one or more that apply)	American Indian or Alaska Native:	<input type="checkbox"/>
		Native Hawaiian or Other Pacific Islander:	<input type="checkbox"/>
		Asian:	<input type="checkbox"/>
		White:	<input checked="" type="checkbox"/>

(This is the top half of the Application Screen.)

1. The NEW LIEAP Application screen is green (the NEW CIP Application screen is tan).
2. Required fields are indicated with red asterisks.

No Amount Requested is needed because the Amount Approved (either \$200 or \$400) is determined by the Fuel Type entered. Both the Amount Requested and Amount Approved fields will be populated after the application is approved on the Eligibility Worksheet (will be displayed on the VIEW LIEAP Application screen).

3. There are three fields that appear on the NEW LIEAP Application screen that do not appear on the NEW CIP Application screen: DAAS (click on “yes” or “no”), Account Number (from the bill), and Resources (4-digit field with no dollar and cents). The Resources field will populate with zero if nothing is entered.
4. Some fields are pre-populated with information brought forward from the New EP Case screen.

The screenshot shows a web browser window displaying the North Carolina DHHS CIP Web Site. The browser's address bar shows the URL: https://cip.test.dhhs.state.nc.us/cip_test/requestLieap.asp. The page title is "North Carolina DHHS CIP Web Site".

The form contains the following fields and values:

- Black or African American:
- Unreported:
- Language: EN - English *
- Relationship: Eligible *
- Medical Deduction:
- Disabled:
- Earned Income: 0.00
- SSA Income: 0.00
- SSI Income: 0.00
- WF Income: 0.00
- Other Income: 0.00
- Resources: 0
- Child Support Paid: 0.00
- Address 1: 410 Penny Lane *
- Address 2: [Empty]
- City: Garner * State: NC * Zip: 27529 *
- Phone: 919-303-8111
- Home Directions: at Hwy 70 Garner Exit, turn right on Vandora Springs Rd. At 2nd stop light turn left and it is the 3rd house on the right.
- Benefit Payee/Vendor: Progress Energy Carolinas, Inc. *
- Account Number: 1234-123-1334-02 *
- Comments: [Empty text area]

At the bottom of the form, there are two buttons: "Add Application" and "Cancel". The timestamp "11/7/2011 11:30:26 AM" is visible in the bottom right corner of the form area.

(This is the bottom half of the Application Screen.)

5. Income fields are dollars and cents (except for the Resources field which is a 4-digit field with no decimal or cents).
6. Key the vendor name and client's account number from the bill.
7. After keying all application information, select Add Application.

8. A message displays asking you to select “ADD” to bring forward members to this application from an existing case’s last application, or select “CANCEL” to add the application without household members (and there won’t be household members to be brought forward since you are keying a new application). Select CANCEL.

The screenshot shows a web browser window titled "North Carolina DHHS CIP Web Site - Windows Internet Explorer". The address bar displays "https://ciptest.dhhs.state.nc.us/cip_test/requestlieap.asp". The browser's Favorites bar includes "NC Department of Health a..." and "NC WebMail & WebCalendar". The main content area is a green-themed form with the following fields and values:

- Black or African American:
- Unreported:
- Language: EN - English *
- Relationship: Eligible *
- Medical Deduction:
- Disabled:
- Earned Income: 1,000.00
- SSA Income: 0.00
- SSI Income: 0.00
- WF Income: 0.00
- Other Income: 0.00
- Resources:
- Child Support Paid:
- Address 1: 11 Lakeside
- Address 2:
- City: Garner *
- Phone:
- Home Directions:
- Benefit Payee/Vendor: CP&L *
- Account Number: 123-44444-22 *
- Comments:

A modal dialog box titled "Message from webpage" is overlaid on the form. It contains the following text:

Select "OK" to bring forward household members for this Application from the last-added case Application (if available).
Select "Cancel" to add Application without household members.

The dialog box has "OK" and "Cancel" buttons.

At the bottom of the form, there are "Add Application" and "Cancel" buttons. The system clock in the bottom right corner shows "11/15/2011 4:56:18 PM". The taskbar at the bottom shows the Start button, several application icons, and the system tray with the time "4:57 PM".

- A VIEW LIEAP Application screen is displayed. An ADD Successful message is also displayed with the application #. Click on OK to clear the message.

North Carolina DHHS CIP Web Site - Windows Internet Explorer

https://cipctest.dhhs.state.nc.us/cip_test/requestLieap.asp

File Edit View Favorites Tools Help

North Carolina DHHS CIP Web Site

North Carolina Department of Health and Human Services

Energy Programs
TEST NC DHHS Division of Social Services TEST

[Main | Case Mgmt | Reports | Utilities | Sys Info | Change Password / Email | Policy | Help | Log Off]

? How to determine eligibility?

VIEW LIEAP Application

Application #:	31154395	Date of Application:	11/15/2011	Amount Requested:	\$0.00
Status:	Pending	Status Date:	11/15/2011 5:02:22 PM	Amount Approved:	
Denied Reason:				Fuel Type:	Electricity
County:	Wake			Worker/ District:	A77
Assistance Type:	Heat				
Funding Type:	LIEAP FUNDING				

Message from webpage

ADD Successful... Application # = 31154395 EP Case # = 50448667

OK

Case #:	50448667	SSN:	000-00-0000	DOB:	4/30/1972
Name: (First,MI,Last,Suffix)	Tina Morris				
Gender:	Female	Ethnicity:	U - Unreported		
Race:	American Indian or Alaska Native:	No	Asian:	No	
	Native Hawaiian or Other Pacific Islander:	No	White:	No	
	Black or African American:	Yes	Unreported:	No	
Language:	EN - English				
Relationship:	Eligible	Medical Deduction:	No	Disabled:	No
Earned Income:	\$1,000.00	SSA Income:	\$0.00	SSI Income:	\$0.00
WF Income:	\$0.00	Other Income:	\$0.00	Resources:	\$0

Done

Trusted sites

100%

Start | Inbox - Microsoft Outlook | LIEAP Admin Letter 201... | North Carolina DHHS... | LIEAP Admin Letter 201... | 5:02 PM

- The Other Household Member List section is displayed after Head of Household.

Since this is a New LIEAP application, there are no members brought forward from an existing case's last application in the Other Household Member List section. Select New Member to display the New Member screen and add members.

North Carolina DHHS CIP Web Site - Windows Internet Explorer

https://cip.test.dhhs.state.nc.us/cip_test/requestLieap.asp

File Edit View Favorites Tools Help

North Carolina DHHS CIP Web Site

Name: (FIRST, MI, LAST, SUFFIX) **Tina Morris**

Gender:	Female	Ethnicity:	U - Unreported		
Race:	American Indian or Alaska Native:	No	Asian:	No	
	Native Hawaiian or Other Pacific Islander:	No	White:	No	
	Black or African American:	Yes	Unreported:	No	
Language:	EN - English				
Relationship:	Eligible	Medical Deduction:	No	Disabled:	No
Earned Income:	\$1,000.00	SSA Income:	\$0.00	SSI Income:	\$0.00
WF Income:	\$0.00	Other Income:	\$0.00	Resources:	\$0
Child Support Paid:	\$0.00				
Address:	11 Lakeside Avenue			Phone:	
	Garner NC 27529				
Home Directions:					

Other Household Member List								
Mem.	Member#	Member Name	Birth Date	SSN	Relation ship	Earned Income	Unearned Income	Resources
None								
New Member								

Benefit Payee/Vendor: **CP&L** Account Number: **123-44444-22**

Comments:

Search Case List Application List New CIP Application New LIEAP Application Edit Application Eligibility

Signature Page

11/15/2011 5:02:22 PM

Done

Start Inbox - Microsoft Outlook LIEAP Admin Letter 201... North Carolina DHHS... LIEAP Admin Letter 201... 5:08 PM

E. New Member Screen

North Carolina DHHS CIP Web Site - Windows Internet Explorer

https://cip.test.dhhs.state.nc.us/cip_test/requestLieap.asp

North Carolina Department of Health and Human Services

Energy Programs
TEST NC DHHS Division of Social Services TEST

[Main | Case Mgmt | Staff Mgmt | Send Msg | Reports | Utilities | Sys Info | Change Password / Email | Policy | Help | Log Off]

How to enter a new member?

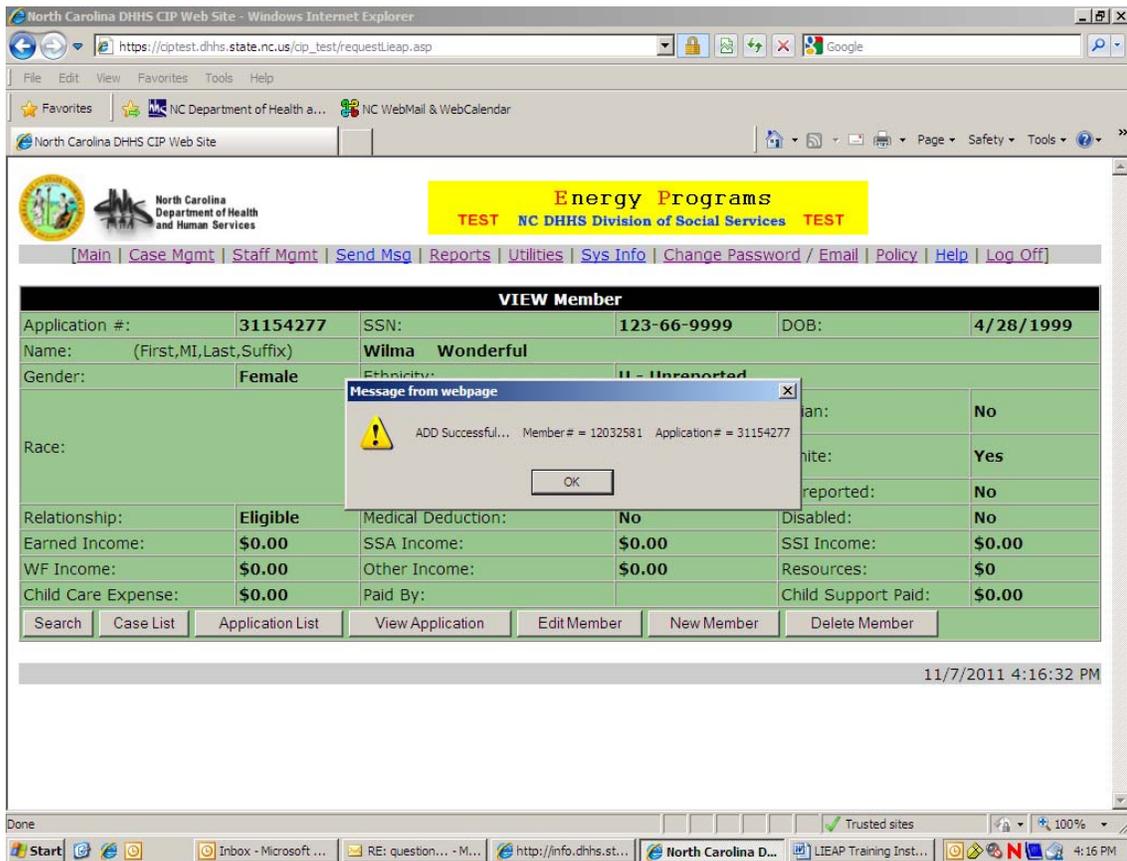
NEW Member

Application #:	31154277	SSN:	<input type="text"/>	DOB:	<input type="text"/>
Name:	(First, MI, Last, Suffix) <input type="text"/> * <input type="text"/> * <input type="text"/>				
Gender:	<input type="text"/>	Ethnicity:	<input type="text"/>		
Race: (* Select one or more that apply)	American Indian or Alaska Native:	<input type="checkbox"/>	Asian:	<input type="checkbox"/>	
	Native Hawaiian or Other Pacific Islander:	<input type="checkbox"/>	White:	<input type="checkbox"/>	
	Black or African American:	<input type="checkbox"/>	Unreported:	<input type="checkbox"/>	
	Relationship:	<input type="text"/>	Medical Deduction:	<input type="checkbox"/>	Disabled:
Earned Income:	<input type="text"/>	SSA Income:	<input type="text"/>	SSI Income:	<input type="text"/>
WF Income:	<input type="text"/>	Other Income:	<input type="text"/>	Resources:	<input type="text"/>
Child Care Expense:	<input type="text"/>	Paid By:	<input type="text"/>	Child Support Paid:	<input type="text"/>

Add Member Cancel

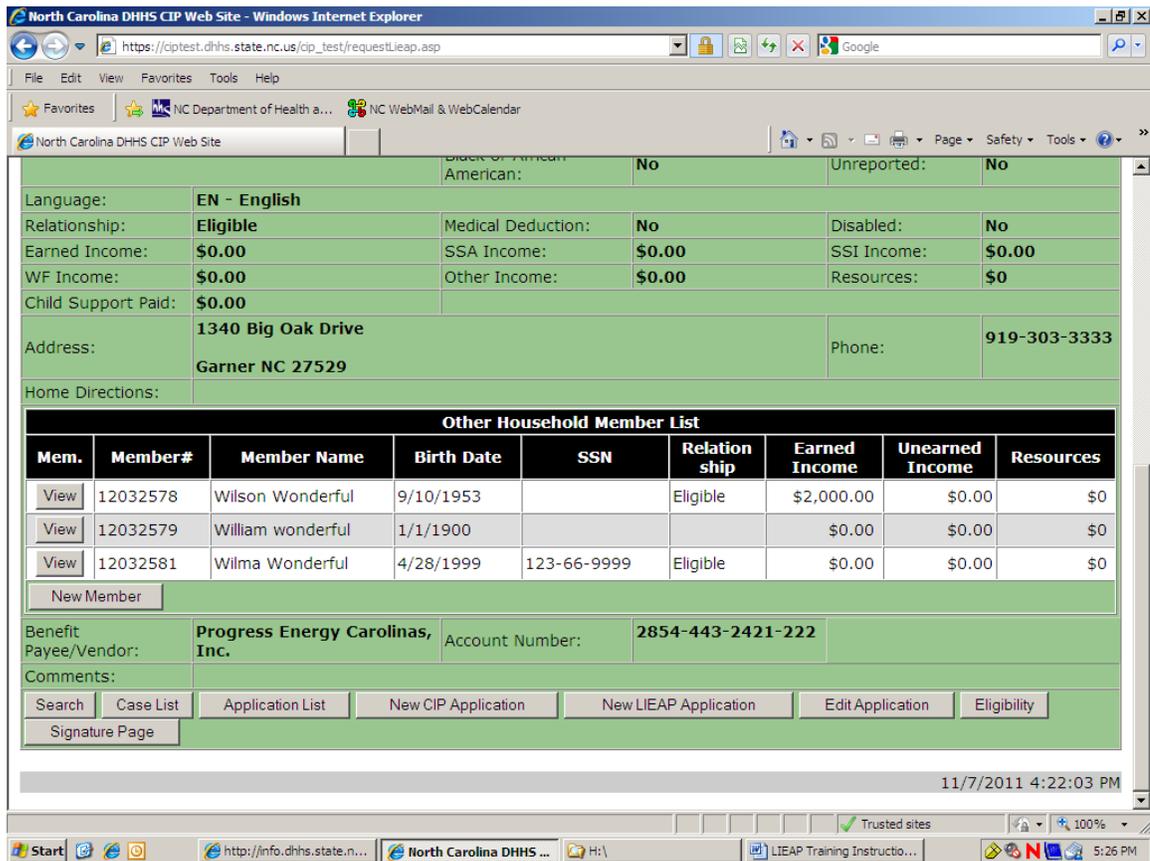
11/7/2011 4:12:38 PM

1. A New Member screen must be keyed for each member of the household to be added. Upon completion of entering information for each member, press the ADD Member button and the View Member screen is displayed.



2. An “ADD successful” message appears with the Member # and Application #.
Click OK to clear the message.
 - a. Click on **New Member** if there are other members to add.
 - b. If there are no more members to add, click on **View Application** to return to the application screen

Delete Member can be used to delete a member and not have them included in the application.



3. Review the application to determine if any corrections need to be made. Select **Edit Application** to make corrections.
4. Select **Signature Page** at the bottom of the application, and print the forms. Have the client sign the forms.
5. Select **Eligibility** to go to the Eligibility Worksheet screen for application approval or denial.

IV. Eligibility Worksheet Screen

North Carolina DHHS CIP Web Site - Windows Internet Explorer
 https://cip.test.dhhs.state.nc.us/cip_test/approve.asp

North Carolina Department of Health and Human Services
Energy Programs
 TEST NC DHHS Division of Social Services TEST

[Main | Case Mgmt | Staff Mgmt | Send Msg | Reports | Utilities | Sys Info | Change Password / Email | Policy | Help | Log Off]

Eligibility Worksheet

Application #: 31154277 Case #: 50448643 Date of Application: 11/7/2011
 Case Head Name: Wanda Wonderful

Household Members

Name	DOB	Rel	Earned	Unearned	Stand Ded	Child Sup	Med Ded	Child Care
Wanda Wonderful	8/30/1988	E	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Wilson Wonderful	9/10/1953	E	\$2,000.00	\$ 0.00	\$ 400.00	\$ 0.00	\$ 0.00	\$ 0.00
Wilma Wonderful	4/28/1999	E	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

3 Household Members

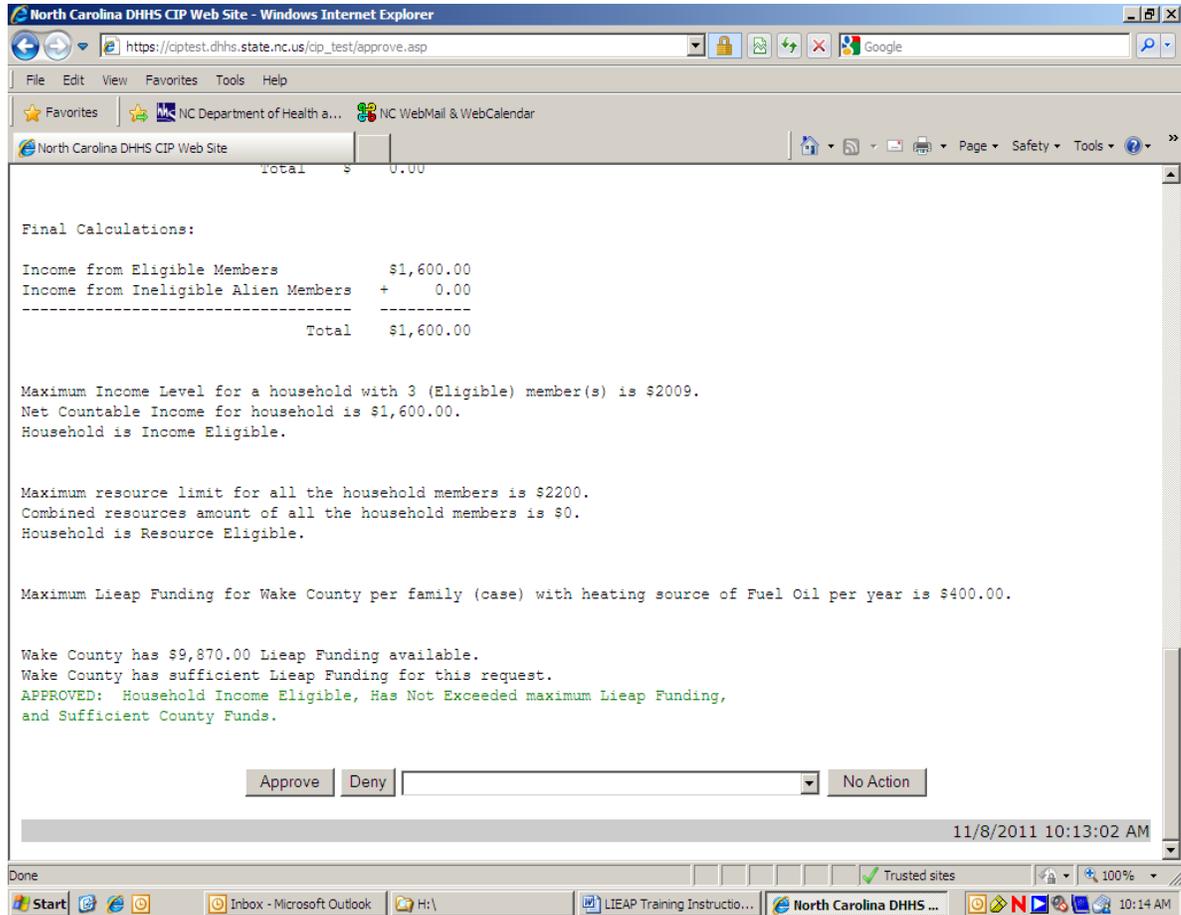
Eligible Members

Name	Earned	Unearned	Stand Ded	Child Sup	Med Ded
Wanda Wonderful	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00
Wilson Wonderful	\$2,000.00	\$ 0.00	\$ 400.00	\$ 0.00	\$ 0.00
Wilma Wonderful	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00	\$ 0.00

(This is the top half of the Eligibility Worksheet Screen.)

- A. The Eligibility Worksheet screen shows the system calculations performed based on the income and resources entered, and eligibility is determined.
 1. System calculations are made on Eligible and Ineligible Alien household members' earned and unearned income, standard deductions, medical deductions, child care expenses, and child support expenses.
 2. After final calculations, the system checks the net countable income for the size of the household and compares it against the 130% poverty level table for LIEAP. A determination is made if the household is Income Eligible.
 3. Next the combined resources of the household are measured against the resource limit of \$2200. A determination is made if the household is Resource Eligible.
 4. If the household is found eligible, the system determines the vendor payment amount of \$200 or \$400 (based on the heating source).
 5. The system checks on the county's LIEAP funding allocation balance to see if sufficient funding is available.

6. With all this criteria having been met/not met, the application comes back as either APPROVED or DENIED.



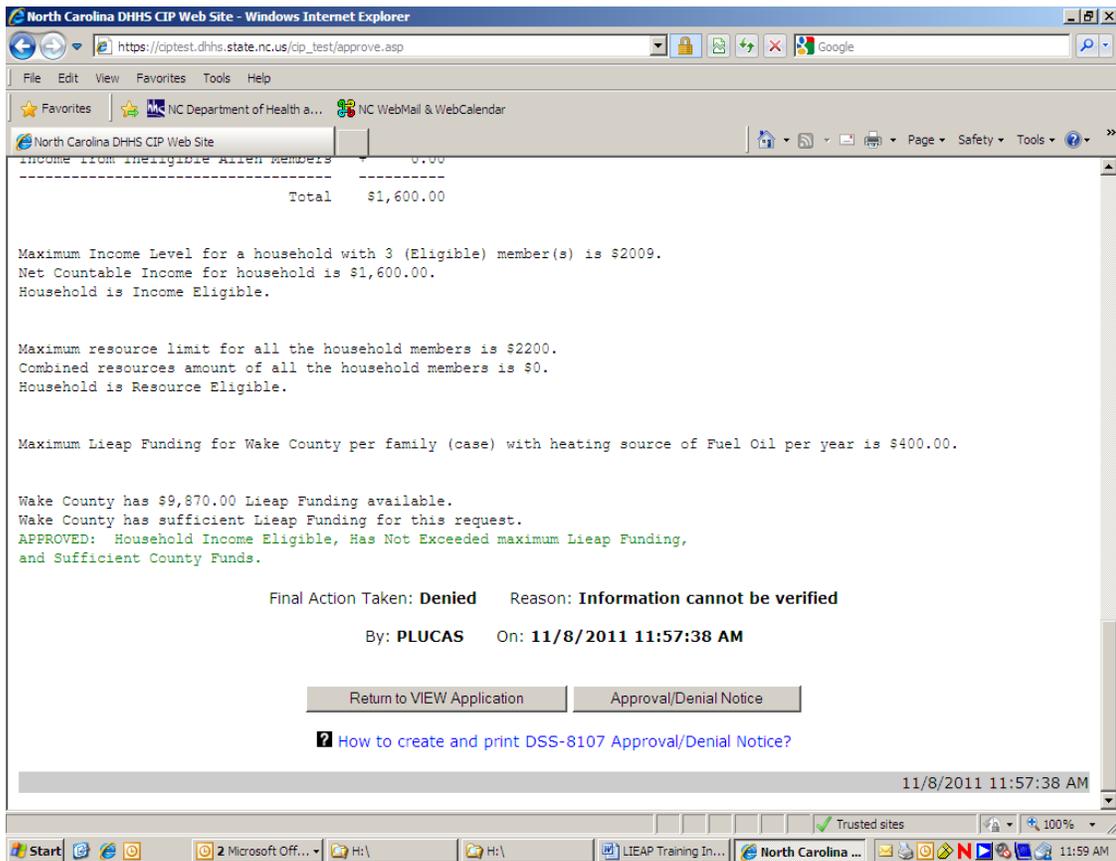
(This is the bottom half of the Eligibility Worksheet Screen.)

For APPROVED applications, an Approve and a Deny button are displayed at the bottom of the Eligibility Worksheet. The Deny button is displayed in the event the worker needs to deny the case because of other factors.

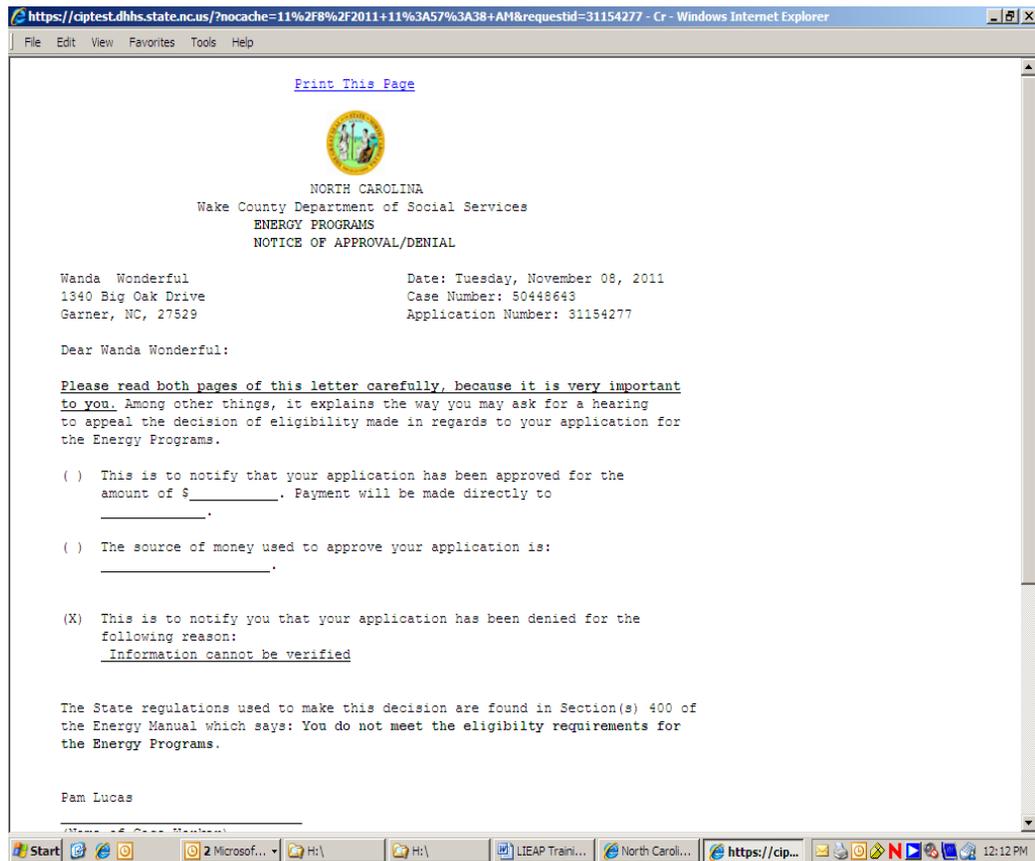
For DENIED applications, a Deny button and a drop-down (for the denial reason) are displayed at the bottom of the Eligibility Worksheet.

- a. Click on **No Action** if you wish to go back and make any corrections or you are not ready to approve or deny the application at this time;
OR
- b. Click **Approve** to approve the application; OR
- c. Click on the denial drop-down to select a denial reason, if you choose to deny the application. Then click **Deny**.

If the system displays the message that the household meets eligibility criteria, but you deem the case ineligible, click on the denial drop down button to select a denial reason and Deny the application.



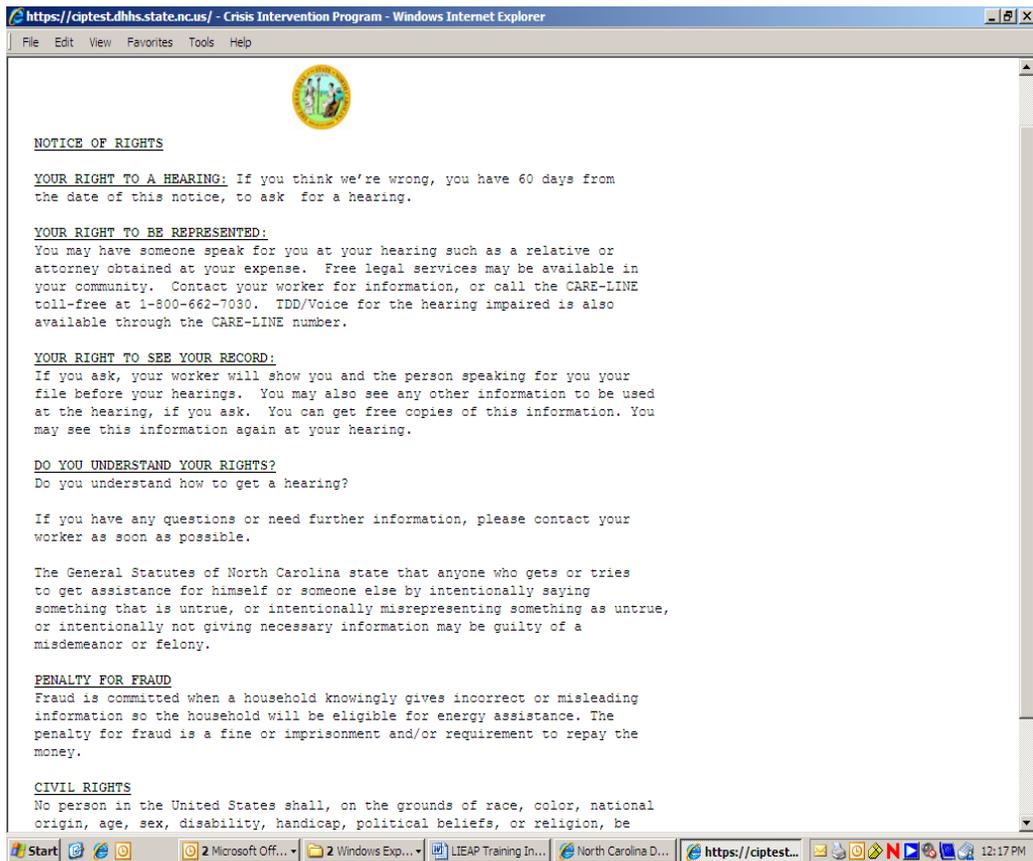
- d. The final action along with the date and worker's name is displayed at the bottom of the Eligibility Worksheet.
- e. Click on Approval/Denial Notice to print the notice.



(This is the first page of the Notice.)

- f. The Notice is displayed on the screen. Click on the “Print This Page” hyperlink at the top of the page. It prints the first side of the notice. Then the second page with the rights to appeal is displayed. Print the second side of the notice.

Some computers require you to print Page 1, click on “X” at the top right-hand corner of the screen, and then print Page 2.

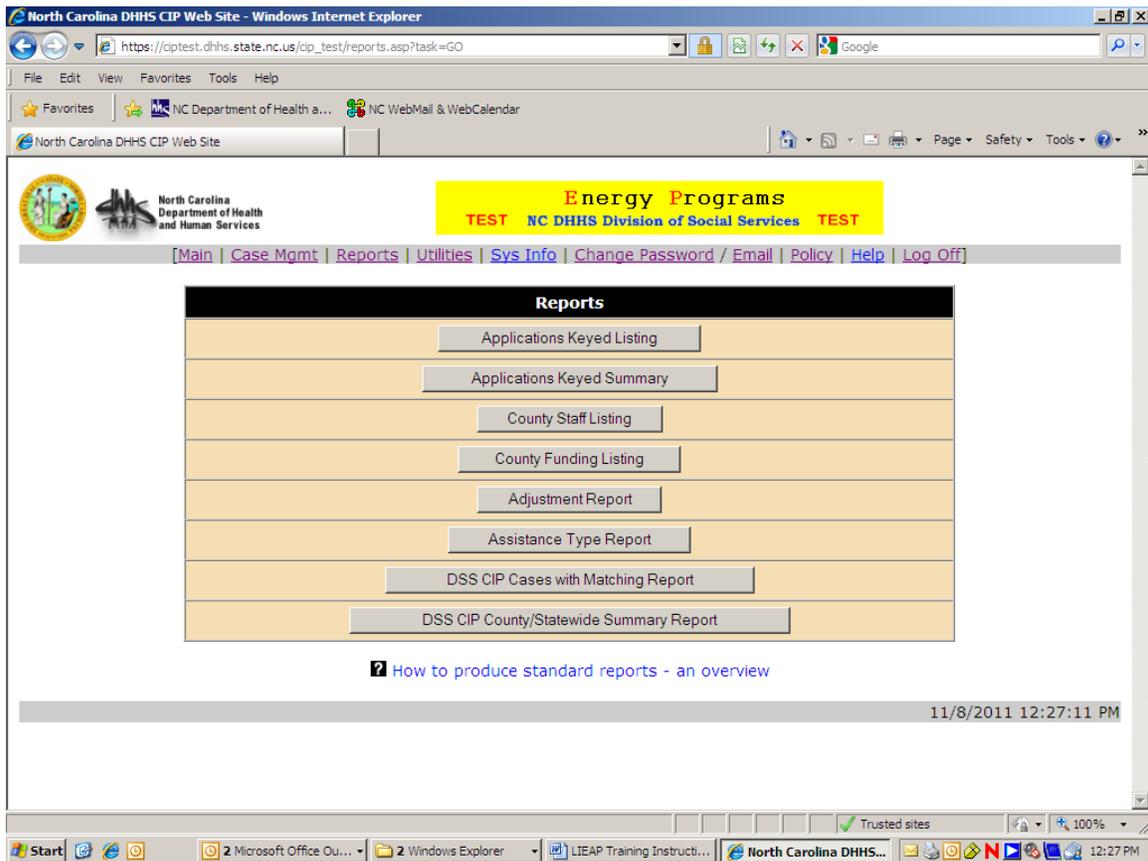


(This is the second page of the Notice.)

- g. From the Eligibility Worksheet, click on Return to VIEW Application. This returns you to the **VIEW LIEAP Application** screen and you can review what was entered for the application.

V. Reports Tab

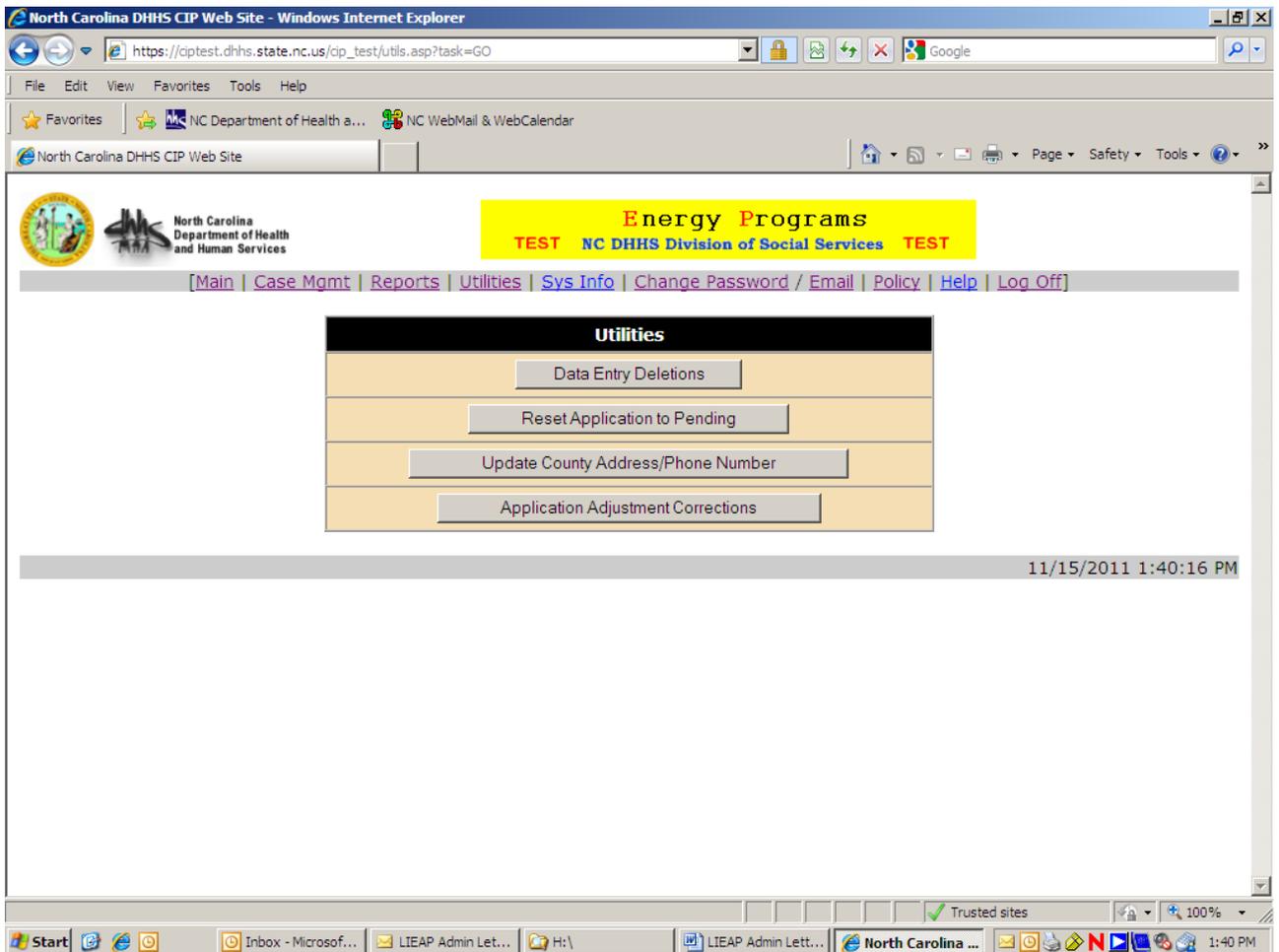
Clicking on the reports tab on the gray toolbar at the top of the screen takes you to the reports available for CIP/LIEAP.



1. **Applications Keyed Listing** report is used to track applications keyed for CIP and LIEAP. Click on Funding Type drop-down and select LIEAP Funding for LIEAP reports.
2. **Applications Keyed Summary** report is used to track a summary of all applications for LIEAP FUNDING. Click on Funding Type drop-down and select LIEAP Funding for LIEAP reports.
3. **County Staff Listing** is used by security officers to review security access for users.
4. **County Funding Listing** report is used to track the “LIEAP Funding” balances to ensure that county funds are not overspent. Click on Funding Type drop-down and select LIEAP Funding for LIEAP reports.
5. **Adjustment Report** is used to track adjustments (refunds) and the vendors. Click on Funding Type drop-down and select LIEAP Funding for LIEAP reports.
6. **Assistance Type Report** is used to track what type of assistance was approved, denied, or is pending by funding type. Click on Funding Type drop-down and select LIEAP Funding for LIEAP reports.

7. **DSS CIP Cases with Matching Report** matches on SSN, address, and name to assist in identifying duplicates. Currently this is only available for CIP. This report will be updated to include LIEAP cases once the report is moved from the Energy Programs System to the Client Services Data Warehouse (CSDW).
8. **DSS CIP County/Statewide Summary Report** is used by State Office staff to pull data from the Energy Programs System that gets reported to the State and Federal government upon request (moving to Client Services Data Warehouse (CSDW)).

VI. Utilities Tab



1. **Data Entry Deletions** function is used by supervisors/leadworkers to delete either a case or application that has been entered IN ERROR. Do not use this function to delete a case or an application that should have been denied, but was approved in error.

Deletions of a case or an application must be made within the current fiscal year.

2. **Reset Application to Pending** function is used by supervisors/leadworkers to allow an already approved/denied application to be reset back to pending for correction purposes (adding individuals, income corrections, etc.).
3. **Update County Address/Phone Number** function is used to update the county's address and phone number for DSS-8107 Approval/Denial notices.
4. **Application Adjustment Corrections** function is where adjustments (refunds from vendors or clients) are entered.