TDHCA -- Information Systems Division
LIHEAP Performance Measures Module External User Guide - Draft
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I. Navigating to the LIHEAP Performance Measures module.

1. Login to CA Contract System.
2. Click on "LIHEAP Modules".
3. Click on "LIHEAP Performance Measures".

If successful, you should be presented with LIHEAP Household Search screen.

From here, users can:
1. Search the LIHEAP Performance Measures database.
2. Upload LIHEAP Household data.

II. Searching the LIHEAP Performance Measures database.

1. Enter your search criteria.
2. Click "Search".

If successful, you should be presented with Search Results just below the search criteria.

From here, users can:
1. Upload LIHEAP Household data.
2. View LIHEAP Household data.

Important:
- The search defaults to current Federal Fiscal Year.
- The search requires at least one field to be entered.
- Provide more search criteria for a more focused and concise result set.

III. Uploading LIHEAP Household data.

1. Click on "LIHEAP Performance Measures".
2. Click on "Upload LIHEAP Household".
3. Click "Browse…"
4. Navigate and select the file to upload in the File Upload dialog.
5. Click "Open".
6. Click "Upload".

If the upload is successful, you should be presented with a success message.

Important:

- Upload file must be formatted as described in **LIHEAPFile_layout_v_1.4-draft.pdf**.
- All errors are considered fatal errors and will terminate the upload process.
- Upload files greater than 10 MB will be rejected.
- The larger the upload file the longer it may take to process.
- Household members are only "loaded" the first time a household is submitted.
- Updates to an existing household are performed via the upload process with the exception of household member updates, household member deletions and household benefit deletions.
- Household member updates, household member deletions and household benefit deletions must be performed manually by program area staff.

IV. Viewing LIHEAP Household data.

1. Search the LIHEAP Household database for the household you wish to view the details for. (See Searching the LIHEAP Household database.)
2. Click "View".

If successful, you should be presented with the View Household Details screen.

V. **File Upload validations**

File Header (FH) record

The following are applied to the FH record or some of the data items provided in the FH record of a submission file.

- If the submission file does not contain an FH record, the system will display the following error message:

  FHE-001 Error: File header (FH) record is missing. Please correct the error and resubmit the household data.

- If the organization ID provided in the FH record is not found, the system will display the following error message:

  FHE-002 Error: The organization (**[TDHCA Subrecipient Organization ID]**) identified in the FH record is invalid. Please correct the error and resubmit the household data.

- If the organization ID provided in the FH record is not that of a valid CA subrecipient, the system will display the following error message:

  FHE-003 Error: The organization (**[TDHCA Subrecipient Organization ID]**) identified in the FH record is not a valid Community Affairs subrecipient. Please correct the error and resubmit the household data.

<u>Household (HH) record</u>

The following are applied to each HH record or some of the data items provided in the HH records of a submission file.

- If the combination of city and zip provided in the HH record code is not found, the system will display the following error message:

  HHE-001 Error: The combination of city (**[Household City]**) and zip (**[Household Zip]**) for household (**[Subrecipient Household ID]**) is invalid. Please correct the error and resubmit the household data.

- If the household's primary heating fuel is not one of (1) Electric, (2) Natural Gas, (3) Propane, (4) Wood, or (5) Other, the system will display the following error message:

  HHE-003 Error: The primary heating fuel type (**[Primary Heating Fuel]**) for household (**[Subrecipient Household ID]**) is invalid. Please correct the error and resubmit the household data.

- If the household's heating cost is less than or equal to $0.00, the system will display the following error message:

  HHE-004 Error: The primary annual heating cost (**[Annual Heating Cost]**) for household (**[Subrecipient Household ID]**) must be greater than zero (0.00). Please correct the error and resubmit the household data.

- If the source of the household's primary heating fuel costs is not one of (1) 12 months actual bill data or (2) Alternative Data, the system will display the following error message:

  HHE-005 Error: The primary heating fuel cost source (**[Annual Heating Cost Source]**) for household (**[Subrecipient Household ID]**) is invalid. Please correct the error and resubmit the household data.

- If the household's electric cost is less than or equal to $0.00, the system will display the following error message:

  HHE-006 Error: The annual electric cost (**[Annual Electric Cost]**) for household (**[Subrecipient Household ID]**) must be greater than zero (0.00). Please correct the error and resubmit the household data.

- If the source of the household's electric costs is not one of (1) 12 months actual bill data or (2) Alternative Data, the system will display the following error message:

  HHE-007 Error: The annual electric cost source (**[Annual Electric Cost Source]**) for household (**[Subrecipient Household ID]**) is invalid. Please correct the error and resubmit the household data.

- If the household is found to exist in the database and the application date of the household in the upload file does not match the application date of the household on file, the system will display the following error message:

  HHE-008 Error: The household with Household ID (**[Subrecipient Household ID]**) and application date (**[Household Application Date from upload file]**) is in conflict with a existing entry with application date (**[Household Application Date from existing entry]**).

Important:

- If, during the processing of a household, the household (i.e. the "HH" record) is found in TDHCA's database, the household information provided in the current submission will be treated as an update to the existing household record.

- The criteria used to determine the existence of a household in TDHCA's database is the combination of TDHCA Subrecipient Organization ID, Subrecipient Household ID, and Household's Program Year.

- A household's Program Year is determined from the household's application date.

Household Member (HM) record

The following are applied to each HM record or some of the data items provided in the HM records of a submission file.

- If the household member's head of household flag is not one of "Y" or "N", the system will display the following error message:

    HME-001 Error: The head of household flag (**[Head of Household Flag]**) for household member (**[Subrecipient Member ID]**) of household (**[Subrecipient Household ID]**) must be either "Y" or "N". Please correct the error and resubmit the household data.

- If the household member's disabled flag is not one of "Y" or "N", the system will display the following error message:

    HME-002 Error: The disabled flag (**[Disabled Flag]**) for household member (**[Subrecipient Member ID]**) of household (**[Subrecipient Household ID]**) must be either "Y" or "N". Please correct the error and resubmit the household data.

- If the household member's annual income is less than $0.00, the system will display the following error message:

    HME-003 Error: The annual income (**[Annual Income]**) for household member (**[Subrecipient Member ID]**) of household (**[Subrecipient Household ID]**) must be greater than or equal to zero (0.00). Please correct the error and resubmit the household data.

Important:

- For each household, only one household member should be designated as the Head of Household.

- Household member information is only gathered upon initial submission of a household. Therefore, if, during the processing of a household, the household's record (i.e. "HH" record) is found in TDHCA's database, all household member information (i.e. "HM" records) in the current submission file will be ignored.

Household Benefit (HB) record

The following are applied to each HB record or some of the data items provided in the HB records of a submission file.

- If the household's benefit type is not one of (1) HCC-Household Crisis Component, (2) UAC-Utility Assistance Component, or (3) WAP-LIHEAP Weatherization, the system will display the following error message:

  HBE-001 Error: The benefit type (**[Benefit Type]**) for household (**[Subrecipient Household ID]**) is invalid. Please correct the error and resubmit the household data.

- If the contract provided with a benefit does not exist in the CA Contract System, the system will display the following error message:

  HBE-002 Error: The contract (**[Contract Number]**) for benefit type (**[Benefit Type]**) with benefit date (**[Benefit Date]**) of household (**[Subrecipient Household ID]**) is not a valid Community Affairs contract. Please correct the error and resubmit the household data.

- If the contract provided with a benefit is not assigned to the organization identified in the submission file, the system will display the following error message:

  HBE-003 Error: The contract (**[Contact Number]**) for benefit type (**[Benefit Type]**) with benefit date (**[Benefit Date]**) of household (**[Subrecipient Household ID]**) is not associated with the organization (**[TDHCA Subrecipient Organization ID]**) identified in this file. Please correct the error and resubmit the household data.

- If the contract provided with a benefit is an "unexpended balance" contract, the system will display the following error message:

  HBE-004 Error: The contract (**[Contract Number]**) for benefit type (**[Benefit Type]**) with benefit date (**[Benefit Date]**) of household (**[Subrecipient Household ID]**) is an unexpended balance contract and cannot be used with this benefit. Please correct the error and resubmit the household data.

- If a benefit's date does not fall within the contract term of the contract identified with the benefit, the system will display the following error message:

  HBE-005 Error: The benefit date (**[Benefit Date]**) does not fall within the contract term (**[Contract Begin Date] – [Contract End Date]**) of the contract (**[Contract Number]**) provided for benefit type (**[Benefit Type]**) of household (**[Subrecipient Household ID]**). Please correct the error and resubmit the household data.

- If a benefit's payment amount is less than or equal to $0.00, the system will display the following error message:

  HBE-006 Error: The benefit payment amount (**[Benefit Payment Amount]**) for benefit type (**[Benefit Type]**) with benefit date (**[Benefit Date]**) of household (**[Subrecipient Household ID]**) must be greater than zero (0.00). Please correct the error and resubmit the household data.

- If a benefit's payment type is not one of (1) Electric, (2) Natural Gas, (3) Propane, (4) Wood, (5) Other, or (6) Weatherization Measure, the system will display the following error message:

  HBE-007 Error: The benefit payment type (**[Benefit Payment Type]**) for benefit type (**[Benefit Type]**)

with benefit date (**[Benefit Date]**) of household (**[Subrecipient Household ID]**) is invalid. Please correct the error and resubmit the household data.

- If a benefit's payment reason is not one of (1) Disconnect, (2) Out of Fuel, (3) Past Due/Shut off notice, (4) Nearly out of Fuel, (5) Repair/Replacement of Operable Energy Equipment, (6) Repair/Replacement of Inoperable Energy Equipment, or (7) Other, the system will display the following error message:

  HBE-008 Error: The benefit payment reason (**[Benefit Payment Reason]**) for benefit type (**[Benefit Type]**) with benefit date (**[Benefit Date]**) of household (**[Subrecipient Household ID]**) is invalid. Please correct the error and resubmit the household data.

- If a benefit's type is (2) UAC-Utility Assistance Component then the benefit payment reason must be one of (1) Disconnect, (2) Out of Fuel, (3) Past Due/Shut off notice, (4) Nearly out of Fuel, or (7) Other; otherwise, the system will display the following error message:

  HBE-009 Error: The combination of benefit type (**[Benefit Type]**) and benefit payment reason (**[Benefit Payment Reason]**) for benefit type (**[Benefit Type]**) with benefit date (**[Benefit Date]**) of household (**[Subrecipient Household ID]**) is an invalid combination of benefit type and benefit reason. Please correct the error and resubmit the household data.

- If a benefit's type is (3) WAP-LIHEAP Weatherization then the benefit payment reason must be one of (5) Repair/Replacement of Operable Energy Equipment, (6) Repair/Replacement of Inoperable Energy Equipment or (7) Other; otherwise, the system will display the following error message:

  HBE-010 Error: The combination of benefit type (**[Benefit Type]**) and benefit payment reason (**[Benefit Payment Reason]**) for benefit type (**[Benefit Type]**) with benefit date (**[Benefit Date]**) of household (**[Subrecipient Household ID]**) is an invalid combination of benefit type and benefit reason. Please correct the error and resubmit the household data.

Important:

- If a benefit's type is (1) HCC-Household Crisis Component then the benefit payment reason can be any of (1) Disconnect, (2) Out of Fuel, (3) Past Due/Shut off notice, (4) Nearly out of Fuel, (5) Repair/Replacement of Operable Energy Equipment, (6) Repair/Replacement of Inoperable Energy Equipment or (7) Other.

- If a benefit's type is (3) WAP-LIHEAP Weatherization, the household's current address is stored as the unit address receiving weatherization services.

- If, during the processing of a household's benefit, the benefit (i.e. the "HB" record) is found in TDHCA's database, the benefit information provided in the current submission will be treated as an update to the existing benefit record.

- The criteria used to determine the existence of a household's benefit in TDHCA's database is the combination of Household ID, Benefit Type, and Benefit Date.

File Trailer (FT) record

The following are applied to the FT record or some of the data items provided in the FT record of a submission file.

- If the submission file does not contain an FT record, the system will display the following error message:

  FTE-001 Error: File trailer (FT) record is missing. Please correct the error and resubmit the household data.

Miscellaneous Validations

Some additional validations that are performed can result in the following error tags:

- Unset Field Value (FWE-001)

- Configuration Value (FWE-002)

- File Not Found (FWE-003)

- Invalid Record (FWE-004)

- Input Line Length (FWE-005)

- Conversion (FWE-006)

All other errors are considered uncategorized and will be marked as:

- UNK-001