



Report #1: Authorization Number Report

This report prints out detailed data about your applicants and program. The data fields are defined below. Here you will see if you have incorrect authorization numbers including C#'s and duplicate numbers, applications on HOLD, applications reaching its due date, if your pledge log matches OPUS, etc. This report can be saved in Excel and sorted as needed.

This report should be ran weekly at least.

Authorization Report

Make selections, Click Submit button.
Reports provided as .pdf files. All fields marked * are required.

LCHSD-LP19-LIHEAP 2019 *Select APC

Intake Date - From: 10-01-2018 *(mm-dd-yyyy)

Intake Date - To: 09-30-2019 *(mm-dd-yyyy)

Additional Report Options

*Select Sort Option:

Applicant Last Name
 Intake Worker
 Vendor
 Authorization Number
 Payment Status
 Intake Date

Submit

Note: Reports will open in a new window.

Authorization Number Report						
LCHSD-LP19-LIHEAP 2019						
10/01/18 to 09/30/19						
Sorted by Payment Status and Last Name						
Auth Number	Applicant	Status	Vendor Name	Amount	Intake Worker	Intake Date
D193936		Agency Paid	LANE ELECTRIC COOPERA	320.00		03/27/19
D191982		Batched	EWEB	255.00		06/28/19
D190006		Deny	AGENCY	0.00		12/21/18
D194010		Hold	VILLAGE GREEN CHEVROI	250.00		06/17/19
D192010		Pending	SUB	285.00		07/18/19
D194076		Void	PACIFIC POWER	385.00		11/06/18
July 22, 2019		2:23 PM		Version 8.3 authnumber.rpt		Page 1 of 1
Data Classification: 2						

Report #14: Energy Program Monitoring

This report prints out detailed notes and energy types of all payments. Use this report to catch incorrect vendor payments (e.g., gas payment to electric utility) and to verify comments are in correct payment types (e.g., comments for bulk fuel payment and/or roomer boarder payments).

When OHCS monitors HSD, this is the report they pull to make sure all required comments are entered into OPUS and that all payments are going to the correct vendors.

If this report is run before delivering applications to HSD, your agency could catch potential errors resulting in a HOLD status once HSD authorizes the applications.

Energy Program Monitoring Report						
LCHSD-LP19-LIHEAP 2019						
10/01/2018 to 09/30/2019						
A191666	[REDACTED]	Roomer/Boar	Agency Paid	EMERALD PUD	125	ELECTRIC LP19: THIS IS A ROOMER/BOARDER PAYMENT. RENTAL AGREEMENT ATTACHED FOR VERIFICATION. 1/18/19 Proof-rental agreement. Appvd MEB
A194262	[REDACTED]	Fuel	Agency Paid	LANE FOREST PRO	400	WOOD 01-25-19 LPMO19 Chose FUEL payment type. Wood fee \$350 plus \$50 delivery. Spoke with vendor, contact person Tim.
D190309	[REDACTED]	Standard	Agency Paid	EWEB	250	ELECTRIC
D190310	[REDACTED]	Combo	Agency Paid	EWEB	415	ELECTRIC 03-25-2019 .. Customer meets crisis criteria, see attached health jeopardy form. Last payment of \$105 made on 3-25-19. Per Zu, at EWEB, total past due is \$414.43 after customer payment and DG program. After \$250 regular LP payment, customer owes \$164.43, pledging a crisis payment of \$165 . 04/19/19 payment made in last 60 days, meets crisis criteria: health jeopardy, crisis ok, BNA

Self-Monitoring Your Own Applications

Before submitting your application, you should double check all required information. Here is a quick check list to use. A full auditor check list is also available from HSD.

<input type="checkbox"/> Adult ID for 18 and older, SS#'s for all who have one	<input type="checkbox"/> NOA's attached if applicable
<input type="checkbox"/> Vendor info verified and updated	<input type="checkbox"/> Correct energy type for payments (electric type for electric payment)
<input type="checkbox"/> Physical address matches vendor info EXACTLY	<input type="checkbox"/> Household type is accurate
<input type="checkbox"/> Education listed as DK (don't know) for 22 and younger – NOT UNKNOWN this prints as UK	<input type="checkbox"/> Disability checked yes ONLY if receiving benefits
<input type="checkbox"/> Income is same date range for all household members	<input type="checkbox"/> Income for all 18 and older for same time range
<input type="checkbox"/> Employer info is entered for all wages	<input type="checkbox"/> Corrections made in GREEN pen and initialed
<input type="checkbox"/> Gross amounts are entered into OPUS	<input type="checkbox"/> Social Security docs for CURRENT year
<input type="checkbox"/> SS#'s and bank account #'s are redacted	<input type="checkbox"/> Notes on paper match what's in OPUS and are initialed
<input type="checkbox"/> All required signatures and dates	<input type="checkbox"/> Time stamp on application matches on all pages

HSD Correction Request Log

HSD keeps a log of all correction requests that are sent to agencies. Because of the volume of corrections needed throughout a season for all programs and agencies, keeping a detailed log is necessary for timeliness in processing applications.

Correction Requests: Program Year 19

Auth No	Program	Agency	Intake Date	Today's Date	Due Date	Date Completed	First Name	Last Name	Correction Category	Action Needed	Intake Worker	Internal Auditor	HSD Staff
D 123456	LP	Agency A	7/22/19	7/23/19	8/10/2019		John	Doe	Income	Current SS BVL	ABC		BNA
D 456789	LP	Agency A	7/22/19	7/23/19	8/10/19	7/25/19	Jane	Jones	Adult ID	Adult ID needed for Jane	LMN		BNA

Each agency is urged to keep a log of applications that have been placed on HOLD internally or by HSD. A log specific to your agency could look like this:

HOLD Applications: Program Year XX

Auth No	Program	Intake Date	Today's Date	Due Date	Date Completed	Applicant First Name	Applicant Last Name	Correction Category	Action Needed	Intake Worker	Internal Auditor
	if your agency has more than one EA program		7/22/19	8/6/2019				e.g., income, adult ID, vendor info			if applicable to your agency

Tip: Use a formula to auto calculate due date. "Today's date" is cell E4, due date is 15 days later: due date cell formula would be =E4+15. The formula can be dragged down the column so you don't need to enter it every time.