



ENERGY OUTREACH COLORADO

2018-2019 Bill Payment Assistance Grant Administration Requirements

Summary

Energy Outreach Colorado's (EOC) Bill Payment Assistance Grant helps low-income individuals and families afford their home energy costs through a network of assistance agencies. Payments are made directly to energy vendors on behalf of customers. The qualifying energy sources are electricity, natural gas, coal, firewood, kerosene, propane, oil, and pellets.

Eligibility

- Gross monthly household income (i.e. income before taxes or deductions) at or below 80% of area median income (AMI). Refer to the table on the [Partner Login](#) page to determine percentage of AMI.
- During the [Low-Income Energy Assistance Program](#) (LEAP) season (November 1 - April 30) all eligible applicants are required to apply for LEAP before receiving EOC funds. If the applicant has not yet applied for LEAP, your agency may assist with that process and EOC at the same time.
- Applicants must be directly responsible for the energy bill. However, the applicant does not have to be the account holder. In cases where the applicant is not the account holder or a member of the household, proof of responsibility for the bill must be present.
- To qualify, applicants must be at least 30 days past due on their energy bill or low on bulk fuel.
- EOC bill payment assistance is available no more than once per energy source (up to two energy sources) during the grant year, which runs from October 1, 2018 through September 29, 2019.

Process

- Clients must complete the paper EOC application. The application must include the applicant's signature and date of application.
- Applicants must sign the Consent to Disclose Utility Customer Data form if they are requesting assistance with one of the four regulated utilities: Atmos Energy, Black Hills Energy, Colorado Natural Gas, and Xcel Energy. *Note: Only the primary account holder may sign the Consent to Disclose. If the primary account holder is not available, you may not request account data from the utility. In that case, use the information on the most current bill and make a note in the database explaining why the form was not signed.* If the applicant is not requesting assistance with a regulated utility, the consent on the EOC client application is sufficient.
- Applicants must provide a photo ID to be copied for their file.
- Your agency must either obtain written verification of application for LEAP or obtain verification via HEAT HELP's LEAP verification line at 800-787-1824. If you use HEAT HELP, make a note in the database of the date, phone number you called from and the name of the representative with whom you spoke.

- If the applicant has not yet applied for LEAP but is eligible for the program, you may assist with the process. Retain a copy of the sent email/fax as written documentation of the LEAP application's submission.
- If the applicant doesn't qualify for LEAP, (s)he does not need to apply. In that case, make a note in the Case Worker Notes section of the database indicating the reason that the client doesn't qualify.
- Enter applications into the Energy Assistance Database within three business days of funds being committed to the energy vendor. The database is a critical tool that allows EOC network agencies to determine eligibility as well as collection information for reporting purposes.
- Contact the vendor by phone or email to verify current amount owed and commit funds based on the guidelines in Payments. Current balance can also be verified through the utility's online portal if it is an Atmos, Black Hills or Xcel account.
- Your organization must offer energy saving information and counsel to applicants who receive assistance. This may include review of the Energy Savings Guide, workshops, referrals to energy efficiency/weatherization programs, etc.
- If your agency is unable or unwilling to assist a client, s(he) must be referred to another EOC partner agency. **Do not refer clients directly to EOC.** To find another agency, call 866-432-8435 or visit <http://www.energyoutreach.org/get-help/find-local-agency>.
- Complete the Utility Payments process within two weeks of entering client applications if EOC does not write the vendor checks on your agency's behalf.
- If your agency writes the checks to vendors, send them along with the Payment Details Report or other listing of accounts to be credited and amounts to be applied.

Payments

All Energy Sources

- The maximum allowable assistance is \$500 per energy source. Clients who pay a combined gas and electric bill may receive a maximum of \$1000 in assistance. If the client is seeking assistance with a bulk fuel, provide the amount of assistance specified below.
- Payments must guarantee service for at least 30 additional days from the date funds were committed. If you are not sure whether your payment will guarantee 30 days of service, contact the vendor.
- Payments must be for actual amounts owed. EOC assistance cannot create a credit in the applicant's account.
- Payments must go to energy vendors. They cannot be made to individuals or landlords.
- EOC funds cannot be used to pay any fee that may be returned to the client, such as deposits or insurance coverage.

Energy-Specific Documentation of Need & Payment Requirements

Depending on the type of energy that the client needs assistance with, there are different requirements for documentation and payments. Below is a description of those requirements broken down by category.

Electricity and Natural Gas

Documentation of Need:

- Client must provide the most recent bill for an active utility account showing a past due balance. The bill should say past due, previous balance, balance forward, or something along those lines. Accounts not belonging to the address at which the client resides are not eligible for assistance.
- If the client does not have the most recent bill, written verification of past due balance and total due must be obtained from the utility. A printout from the utility's energy assistance portal is an acceptable form of written verification. The following utilities have energy assistance portals: Atmos Energy, Black Hills Energy and Xcel Energy.

Payment:

- Pay the past due or any amount up to \$500 for a single energy source or pay the past due or any amount up to \$1000 for combined gas and electric accounts.
- If the maximum payment of \$500 per energy type will not restore service or continue service for 30 days, do not approve.

Prepay Electricity

Documentation of Need:

- Clients must provide proof of having a low balance (within 5 days of running out) or being out of funds in their account.

Payment:

- Multiply the average monthly usage of the applicant by three and pay that amount or up to \$500, whichever is lesser.

Propane, Fuel Oil and Kerosene

Note: The smallest size tank EOC can provide assistance with is 100 gallons.

Documentation of Need:

- Applicants must indicate the Emergency Type on their application for assistance: running low on fuel (30% or below) or empty tank.
- Invoice from vendor to be paid.

Payment:

- Call the vendor to find out how much fuel is needed to fill the tank in a single delivery, up to \$500.

Firewood, Pellets and Coal

Documentation of Need:

- Clients must indicate the Emergency Type on their application for assistance: running low on fuel or out of fuel.
- Vendor contact information if the agency does not have a list of preferred vendors.
- Invoice from vendor to be paid. If the fuel is delivered, a delivery receipt must also be provided.

Payment:

The maximum payment for firewood, pellets and coal is \$500. Refer to the table below for minimum and maximum allotments.

Fuel Type	Minimum Allotment	Maximum Allotment
Firewood	One Cord	Two Cords
Pellets	Half Ton	One Ton
Coal	Half Ton	One Ton

Documentation

All applicant files must be retained for 7 years. They can be stored in hard copy or electronically and must contain at a minimum:

- A completed paper application
- The bill or invoice that was paid
- Signed Consent to Disclose Utility Customer Data if applicable (see p. 1)
- Copy of a photo ID
- The LEAP letter of approval or denial or other written proof of application from LEAP if during LEAP season (Nov. 1 – April 30). Verbal verification may be substituted if obtained through HEAT HELP’s LEAP verification line (800-787-1824). In that case, the date of the call, phone number from which the caseworker called and the HEAT HELP representative’s name must be noted in the database Case Worker Notes section.
- A copy of the check to the energy vendor must be made available in case of audits unless EOC writes the checks on behalf of your agency.

EOC Assistance for Agency Network Staff, Volunteers and Board Members

Agencies receiving the Bill Payment Assistance Grant cannot assist their own staff, volunteers or board members with EOC funds. Those applications must be referred to Discover Goodwill for assistance and should be submitted to LEAPHELP@discovermygoodwill.org. Applications must be reviewed by the agency’s EOC program contact for completeness before submission. Agency staff, volunteer and board applications must meet the same requirements as the applications completed by your clients. They must include:

- EOC paper application
- Copy of the bill or invoice to be paid
- Copy of a photo ID
- Signed Consent to Disclose Utility Customer Data if a regulated utility (see p. 1)

Agency Point of Contact

Each agency is required designate a point of contact for the Bill Payment Assistance Grant. This person will fulfill the following functions:

- Attend annual Training and Orientation.
- Serve as a liaison between the agency and EOC. All communications between the agency and EOC should go through the Program Contact unless it is a high-level matter that requires direct communication with the agency's Executive Director.
- Be responsive to program-related communications.
- Read and understand the Grant Administration Requirements prior to using the database and administering the EOC program and confirm that all caseworkers have done so as well.
- Understand how to use the Energy Assistance Database regardless of whether (s)he uses it for entering client applications or other purposes on a regular basis.
- Ensure timely and accurate data entry of online client applications as well as Utility Payments (if applicable).
- Ensure that all database users complete and sign the Energy Assistance Database Access Request form. A copy must be submitted to EOC via email or fax and the hard copy should be retained with the agency's program files.
- Inform EOC immediately of any program-related staff changes. This includes changes at the Executive Director and program levels. In the event that the Program Contact leaves the agency or no longer works on EOC, a new contact must be designated and a new Program Contact form must be submitted to alert EOC of the change.
- Alert EOC in advance of change of address.

Questions?

If a situation arises that is not covered in this document or clarification is needed, your agency's EOC Program Contact can reach the Energy Assistance staff at energyassistance@energyoutreach.org.