

PY2025 IHCDA EAP Operations and Policy Changes

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Community Programs Manager**

July 16, 2024

PURPOSE OF TRAINING

The purpose of this training is to provide a broad overview of this year's EAP operational design and to inform you of major policy changes.

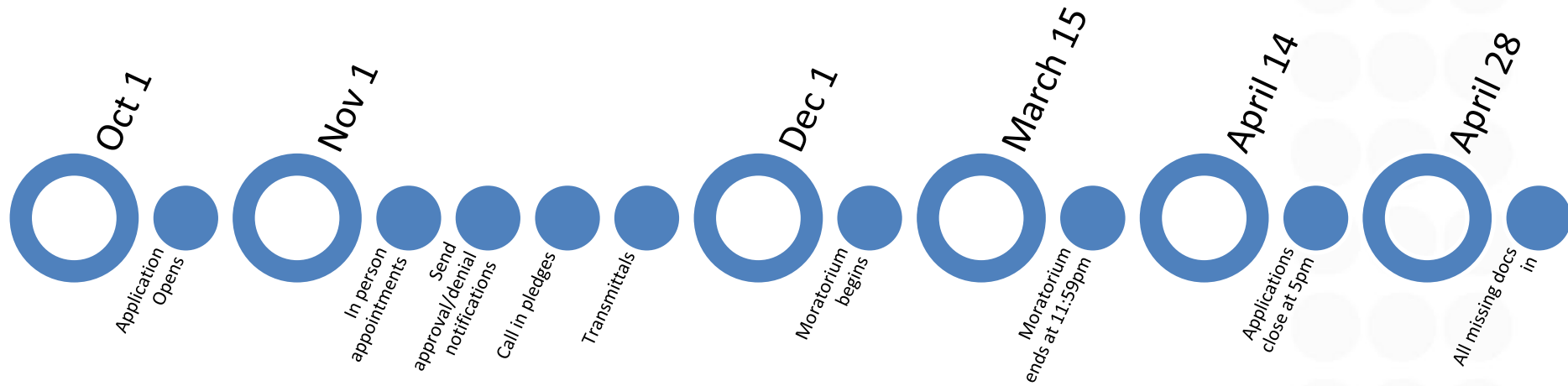
AGENDA

1. Operations Updates
2. Policy Changes
3. Changes to Forms

OPERATIONS UPDATES-WHAT'S NEW



PROGRAM OPERATIONS TIMELINE



PROGRAM OPERATIONS TIMELINE

Before Program Year 2025
Officially Starts:

LSPs may distribute applications
to their vulnerable population
households beginning Monday,
August 12, 2024.



PROGRAM OPERATIONS TIMELINE

Official start of federal program year is **October 01, 2024**.

Starting Tuesday, October 1, 2024:

- LSPs may distribute applications to any non-vulnerable population households beginning at 8:00am Eastern time
- The online application portal will open to all applicants at 8:00am Eastern time
- LSPs who conduct in-person appointments may start setting those appointments, provided the appointments are set for no earlier than **November 01, 2024**.

PROGRAM OPERATIONS TIMELINE

The official start of the statewide Energy Assistance Program is Friday, **November 01, 2024.**

What can begin starting November 1?

- In-person appointments or taking walk-in crisis.
- Benefit approval and/or denial notification letters to applicants can be issued
- Verbal or written pledges to utility vendors or fuel providers can be made
- Transmittals can be sent to utility vendors or fuel providers.
- Crisis checks in-house to biofuel households in crisis and/or wood vouchers for households purchasing biofuel from a vendor with whom the LSP has an MOA can be issued
- Executed transmittals can be submitted to IHCDCA Fiscal for payment.

PROGRAM OPERATIONS TIMELINE

Statewide utility shutoff moratorium begins Sunday, **December 01, 2024**.

- Applicants are granted protection from utility disconnect by non-bulk fuel utility vendors upon successful submission of an application for energy assistance, until such time as household eligibility has been determined.
- LSPs must notify utility vendors of a household's application if they are aware that a household is facing an imminent disconnection and they are not able to immediately determine eligibility.
- Documentation of such notification in a client file will count as crisis mitigation.



PROGRAM OPERATIONS TIMELINE

- Notifying the vendor does not relieve the LSP of the responsibility to prioritize eligibility determination of households that are presenting with an energy crisis.
- Unless service is already disconnected and the benefit is insufficient to restore service, LSPs must waive the requirement for a client contribution during moratorium, because continued service is guaranteed by moratorium protection. LSPs may, however, encourage a client contribution.
- Vendors who indicate they do not intend to observe moratorium protection should be reminded of their legislative requirement to do so. If a vendor continues to indicate it will not observe moratorium, please escalate to IHEDA.

PROGRAM OPERATIONS TIMELINE

Statewide utility shutoff moratorium ends at 11:59pm on **Saturday, March 15, 2025.**

- Utility vendors may disconnect households regardless of eligibility status, including households who were previously approved and who are now in arrears.
- LSPs may issue additional crisis to already-approved households who are now facing disconnect, pending availability of crisis funding.
- LSPs may require client contributions for new applicants if the eligible benefit is insufficient to provide continuing service.

PROGRAM OPERATIONS TIMELINE

Application deadline is
5:00pm Eastern time on
Monday, April 14, 2025.

- EAPConnect will no longer accept application submissions after this time.
- Applicants may submit incomplete applications, but will have a hard deadline of returning missing documentation by **April 28, 2025.**



PROGRAM OPERATIONS TIMELINE

- All outstanding applications must have final eligibility determined and in either approved or denied status by Monday, **April 28, 2025**.
- All outstanding transmittals must be submitted to IHEDA Fiscal by **Monday, May 12, 2025**.
- All vendors must be fully reconciled by **Monday, May 26, 2025**.
- The official closing date of federal program year 2025 is **September 30, 2025**.

BENCHMARK CHANGES

The benchmarks
will be adjusted
as follows:

Benchmark #1: 25%
of available benefit
funds obligated by
November 15, 2024

Benchmark #2: 50%
of available benefit
funds obligated by
January 15, 2025

Benchmark #3: 75%
of available benefit
funds obligated by
March 15, 2025

QUIZ!

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What is the last day for an applicant to submit an application for EAP 2025?



What is the last day for an applicant to submit an application for EAP 2025?

Quiz question 78 answers 78 participants

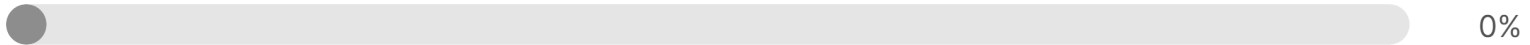
March 15, 2025 - 2 answers



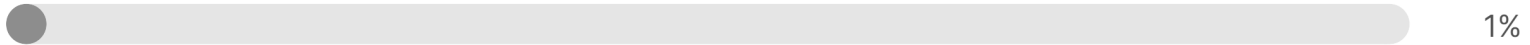
April 14, 2025 - 75 answers



May 19, 2025 - 0 answers



September 30, 2025 - 1 answer



QUESTIONS?



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EAPCONNECT



EAPConnect is Roeing's web-based interface. All eligibility determination and client tracking must be performed and documented in EAPConnect.

- We began in January working with Roeing on the Scope of Work for PY25, and we are still working with them to finalize the scope and schedule of the release of enhancements.

Roeing will train on these enhancements once the enhancements have been completed.

IN THE WORKS

We have decided it is in Indiana's best interest to publish a Request For Proposal, or to RFP the contract for our EAP Data system for PY26

- **The RFP was released June 10th and will be due July 22nd**
 - Roeing and other qualified providers are welcome to apply
 - This will have NO effect on EAPConnect in PY25
- This decision was made based on several factors including:
 - Consistent reporting issues
 - The noncompetitive pricing for the most recent Scope of Work
 - Wanting to make the application less burdensome on applicants
 - Better incorporate enhancements requested
 - Such as the desire from multiple stakeholder groups to view documents in the system without downloading them

YOUR FEEDBACK NEEDED

We want your feedback!

- As part of the RFP, we are asking the Respondents to submit a 10-minute video demonstration of their software
- The demos will be shared along with a survey
- EAP staff can respond to a survey with their opinions of the software demos
- This will be optional, but is an opportunity to share your thoughts before we score the responses

ONLINE APPLICATIONS

Applicants will continue to be able to apply 24 hours a day, 7 days a week, from any computer or internet-connected mobile device through the online portal.

LSPs will be responsible for:

- Regularly monitoring the online application portal for new applications
 - Particularly for households in crisis
- Developing internal procedures to integrate online applications into their intake workflow

Online applicants are subject to the same rights and responsibilities as households who apply via any other method.

ONLINE APPLICATION LINK

All LSPs must provide a link to the online application portal on their website to facilitate equity of access.

This link shall lead applicants to <http://eap.ihcda.in.gov>.

Please ensure your website links to our landing page, and not directly to the application.

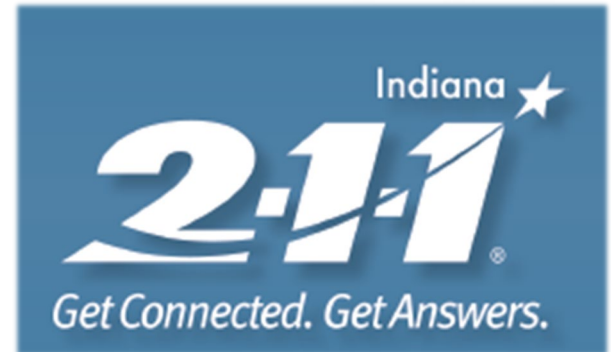
APPLICATION CHANGES

- The EAP application no longer collects information that is specific to the CSBG report, Module 4, Section C: All Characteristics Report.
 - The online application will likely still include this information due to changes in the Roeing Scope of Work.
 - For CSBG Module 4 reporting, subrecipients should either plan to collect the Module 4-specific data through its own methods or make use of the unknown/not reported field.
- Beginning in PY2025, applicants will identify household members who are not citizens or qualified non-citizens on the application and will self-certify to the citizenship status of all household members by signing and submitting the application.

TELEPHONIC APPLICATIONS

- IHCD will continue to partner with Protiviti contractors working with the state's 2-1-1 service to provide telephonic access to submit an application.
- The Protiviti contractors will submit an electronic applications through the portal on behalf of the applicant.
- Protiviti contractors will have a script instructing them to inform the applicant of their responsibility to submit documents to the LSP within 14 days.
- The LSP must follow up with a formal incomplete letter, as would be required with an incomplete application submitted via any other method.

Telephonic applicants, like online applicants, are subject to the same rights and responsibilities as households who apply via any other method.



SUBRECIPIENT AGREEMENTS

We currently have no insight into when we might expect the first release of PY2025 funds, nor what the amount of our award might be this year.

We do anticipate operating under a Continuing Resolution until at least after the 2024 Presidential Election, and so the initial release is likely to constitute 90% of the total amount appropriated in FY2024.

TRANSMITTALS

- We do not anticipate any changes to the way transmittals are run this year.
- IHCDAs asks that transmittals be sent to vendors electronically.
 - Avoid using regular mail to send transmittals, unless this is the only way a vendor can receive them.
 - Please ensure that you are notifying IHCDAs of these exceptions.
- All claims must be transmitted to vendors within fourteen (14) calendar days of claim approval.
- All transmittals must be corrected and sent to IHCDAs Fiscal within seven (7) calendar days of receipt of approval from vendor.
- IHCDAs strongly encourages all LSPs to adhere to a weekly schedule at minimum for both transmittals and submission of signed transmittals to IHCDAs Fiscal.

LSP EMAIL

Agencies are **required** to have a public-facing e-mail inbox where applicants can send questions, requests for information, and other correspondence.

IHCDA EMAIL

There is a generic e-mail for EAP. Agencies should use the IHCDA mailbox for general correspondence, questions about guidance, sending back budget modifications, questions, etc., rather than e-mailing the manager or analysts directly.

- **EAP@IHCDA.IN.GOV**

STATEWIDE APPLICATION

- New application forms will be made available to LSPs shortly.
 - We have enhanced the language in the application's certification statement so applicant's signature functions as self-attestation of the identity and eligibility to receive benefits.
- IHCD encourages fillable EAP applications to be made available.
- We will allow LSPs to fill out applications over the phone without obtaining a client signature, but notes must be made in the Statewide database.
- Must have the subrecipient's logo and contact information at the top. At a minimum, this must include address and phone number, and e-mail address.

DETERMINATION DATES

The LSP must make a timely and accurate determination of the household's eligibility for benefits within the timeline below:

For appointments: Fourteen (14) calendar days of the application's completion.

For mail-ins: Fifty-five (55) calendar days of received date. The time frame starts November 1.

- Any application received before November 1, 2024 would have to be processed within 55 calendar days of November 1, or December 26.

DATES

Received date: The date an application is received by the LSP.

LSPs must date stamp all incoming mail-in applications when received.

These applications should be processed on a first-received, first-served basis, crisis notwithstanding.



DATES IN EAPCONNECT

Application Date: the date stamp of the application.

Application Entered: the day that the application was entered into the database.

Completion date: The day that the application was completed. This will be mandatory when the client has a claim pending.

Application	Household	Members	Income	Dwelling	Benefits	Status	Crisis	Claims	Documents	Reports
Application Date	<input type="text" value="8/1/2020"/>									
Application Entered Date	<input type="text" value="8/23/2020"/>									
Application Completed Date	<input type="text" value="8/23/2020"/>									
Application Taken	<input type="text" value="Online"/>									
Site if not Office	<input type="text"/>									

CLOSED ACCOUNTS

- An EAP benefit **can** be applied to a closed account **if the client received the pledge or benefit before the account was closed.**
- An EAP benefit **cannot** be applied **if the funds are pledged or transmitted to the vendor after the client has closed the account.**
- Vendors **may not** apply EAP benefits to closed accounts with an outstanding balance.
- Benefits may only be awarded to accounts that are scheduled for closure or in “final bill” status if such a benefit will result in the account being reinstated and service continued at the address of record.

CLOSED ACCOUNT EXAMPLE

A client closed an electric account and declared bankruptcy after submitting a mail-in application.

The LSP transmitted a benefit five (5) days after the account was closed.

The utility vendor didn't catch that the account was closed when checking the transmittal and the transmittal was approved.

When the funds were paid to the utility vendor, it applied the funds to the outstanding balance.

The vendor should have rejected the benefit on the transmittal. If it got through the transmittal process and was paid out, the vendor will have to send the entire benefit back to IHCDA.

INDIVIDUAL CHECKS

- LSPs should make every effort to have clients who receive a direct payment benefit sign up for ACH/Direct Deposit, or to waive their direct benefit to a utility that they pay separately.
- IHCD's banking institution will continue to print and mail the checks and initiate direct deposits.
- If a biofuel client is in crisis and needs an immediate benefit, and the LSP does not enter into MOAs with biofuel vendors, the LSP should issue the client an immediate crisis benefit and submit a claim for reimbursement. The LSP must include a list of clients who received a crisis benefit with the claim submission.
- For clients who have utilities included in their rent, the threshold of monthly rent paid required in order to be eligible for a benefit is \$1.00.

HOUSEHOLD ELIGIBILITY VS. BENEFIT ELIGIBILITY

If a household has a circumstance that is preventing the awarding of a benefit (e.g., inoperable equipment, outstanding deposit on account, etc.), this **does not** impact the determination of overall household eligibility.

- Intake staff must take care to distinguish between household eligibility and benefit eligibility.
- Household eligibility may be used to determine eligibility for other resources and can qualify households for moratorium protection.
- When household resolves issues preventing benefit payment, household eligibility must not be redetermined.
- Households **must not be denied** on the basis of not submitting utility bill documentation.

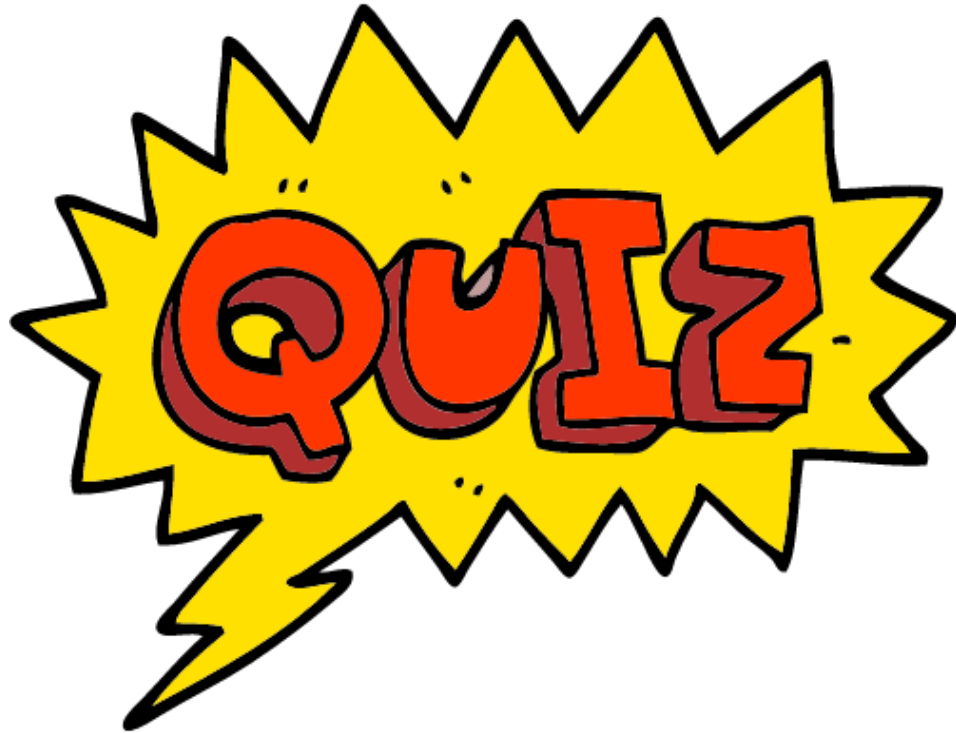
LSP ADMINISTRATION

For PY2025, the Administrative line item in LSP budgets is unchanged from last year's level of 7.5%.

For PY2025, the Outreach and Eligibility Determination line item is unchanged from last year's level of 4.5% of total award.

These will be reviewed in greater detail in another module.





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**What is the benchmark
schedule for PY2025?**



What is the benchmark schedule for PY2025?

Quiz question 72 answers 72 participants

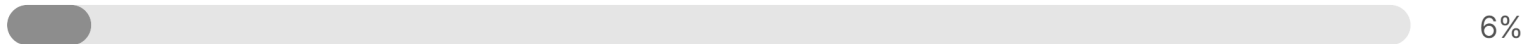
30% obligated by December 1, 2024; 60% by February 1, 2025; 75% by April 1, 2025 - 1 answer



30% obligated by November 15, 2024; 60% by January 15, 2025; 75% by March 15, 2025 - 0 answers



25% obligated by December 1, 2024; 50% by February 1, 2025; 75% by April 1, 2025 - 4 answers



25% obligated by November 15, 2024; 50% by January 15, 2025; 75% by March 15, 2025 - 67 answers





QUESTIONS?

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POLICY CHANGES



APPLICATION AND FORM SUBMISSIONS

- An application form may only be signed and submitted by a household member or a person legally authorized to sign on a person's behalf (e.g., a power of attorney).
 - If a third party is signing/submitting on a household's behalf, documentation of legal authority is required.
- This applies to physical paper applications as well as online submissions.
 - This does not apply to telephonic applications, in which LSP intake staff or Protiviti staff are obtaining verbal consent to the terms of the certification statement.
- This applies not just to applications but to all supporting documentation and forms.
- Intake must take care to check signatures on submitted documents.

PHOTO IDENTIFICATION

Beginning PY25, photo identification will no longer be required.

What does this mean?

- Regarding both identity and SSN, we have enhanced the language in the application's certification statement so applicant's signature functions as self-attestation of the identity and eligibility to receive benefits.
- There will not be an additional form for the applicant or any applicant household member to sign.

SOCIAL SECURITY CARDS

Beginning in PY2025, Social Security Cards or any other proof of SSN will no longer be required of any household members.

- The applicant will provide all Social Security Numbers on the application and will certify their accuracy by signing the certification statement.
- The applicant will affirm the SSNs of all household members on the application form.

INCOME CALCULATION AND ELIGIBILITY

- This year, income eligibility will continue to be based on 60% of State Median Income only. We **will not** switch over to 150% of Federal Poverty Guidelines once FPG outpaces SMI.
- The most recent SMI for a household of four is \$103,324.

HH size	1 month	3 months	12 months
1	\$ 2,686	\$ 8,059	\$ 32,237
2	\$ 3,513	\$ 10,539	\$ 42,156
3	\$ 4,339	\$ 13,018	\$ 52,075
4	\$ 5,166	\$ 15,498	\$ 61,994
5	\$ 5,992	\$ 17,978	\$ 71,913
6	\$ 6,819	\$ 20,458	\$ 81,832
7	\$ 6,974	\$ 20,923	\$ 83,692
8	\$ 7,129	\$ 21,388	\$ 85,552
9	\$ 7,284	\$ 21,852	\$ 87,412
10	\$ 7,439	\$ 22,317	\$ 89,272

BENEFIT CHANGES

- The average benefit amount per household will decrease
- This was done so we can serve more households, and alleviate the funding issues we saw in PY24
- The electric benefit will be stratified based on income in order to better target higher benefit levels to those households with the lowest income.

BENEFIT CHANGES

- Income Matrix Points

Criteria	PY 2024 Points	PY 2024 Award	PY 2025 Points	PY2025 Award
0-30% SMI	8	\$200.00	6	\$150.00
30-45% SMI	6	\$150.00	4	\$100.00
45-60% SMI	4	\$100.00	2	\$50.00
Heat in rent	0	\$0.00	2	\$50.00

BENEFIT CHANGES

- Dwelling Matrix Points

Criteria	PY 2024 Points	PY 2024 Award	PY 2025 Points	PY2025 Award
Site-Built Single Home	2	\$50.00	3	\$75.00
Mobile Home	2	\$50.00	2	\$50.00
Multi-Unit	1	\$25.00	1	\$25.00
Heat in rent	0	\$0.00	0	\$0.00

BENEFIT CHANGES

- Heating Fuel Matrix Points

Criteria	PY 2024 Points	PY 2024 Award	PY 2025 Points	PY2025 Award
Deliverable bulk fuel	12	\$300.00	6	\$150.00
Biofuel	12	\$300.00	6	\$150.00
Electricity	3	\$75.00	0	\$0.00
Natural Gas	3	\$75.00	0	\$0.00
Any fuel included in rent	0	\$0.00	0	\$0.00

BENEFIT CHANGES

- **Vulnerable Population Matrix Points**

Criteria	PY 2024 Points	PY 2024 Award	PY 2025 Points	PY2025 Award
Vulnerable Household	4	\$100.00	2	\$50.00
Nonvulnerable Household	0	\$0.00	0	\$0.00

BENEFIT CHANGES

- **Electric Adder Benefit**

Criteria	PY 2024 Points	PY 2024 Award	PY 2025 Points	PY2025 Award
0-30% SMI	N/A	\$150.00	N/A	\$100.00
30-45% SMI	N/A	\$150.00	N/A	\$75.00
45-60% SMI	N/A	\$150.00	N/A	\$50.00
Heat in rent	N/A	\$150.00	N/A	\$50.00

CRISIS BENEFIT CHANGES

- Maximum crisis amounts will be **decreasing**
 - **\$400** per utility per household, for a total of **\$800** per household
- Crisis shall continue to be administered based on the utility bill **at the time of application**
- If a household goes into crisis while the application is in process, the application should be expedited, but **you shall continue to award crisis benefit based on bill at the time of application**
- A household may return for additional crisis benefit **once** if they are experiencing an energy crisis **between March 01, 2025 and April 14, 2025**

OVERALL BENEFIT CHANGES

Criteria	2024 Minimum	2024 Maximum	2025 Minimum	2025 Maximum
Income	\$100.00	\$200.00	\$50.00	\$150.00
Dwelling	\$0.00	\$50.00	\$0.00	\$75.00
Heating Fuel	\$0.00	\$300.00	\$0.00	\$150.00
Vulnerable Population	\$0.00	\$100.00	\$0.00	\$50.00
Electricity Adder	\$150.00	\$150.00	\$50.00	\$100.00
Matrix Total	\$250.00	\$800.00	\$100.00	\$525.00
Crisis	\$0.00	\$1,000.00	\$0.00	\$800.00
Total	\$250.00	\$1,800.00	\$100.00	\$1,325.00

CREDIT BALANCE CHANGES

Credit Balances

- If an approved applicant household member has a credit balance on a metered utility in excess of **\$250**, the household will be considered programmatically eligible, but **will not receive a benefit** on that utility for PY2025, even if the credit falls below \$250.
- If an approved applicant household has a credit balance on a deliverable heating fuel account in excess of **\$500**, the household will be considered programmatically eligible, but **will not receive a benefit** for that fuel **until the credit falls below \$500**.

ERR CHANGES

- Changes on how you select contractors
 - Less restriction
 - More alignment with internal LSP agency procurement policies
- Focus on repair
 - Replacements still allowed, but require a justification
 - All replacements will need an additional level of approval under the new policy.
 - The contractor or staff person performing the assessment must demonstrate why a repair is not feasible prior to any replacement work being approved.
- Monitored separately
 - Still impacts risk assessment, but is not a part/done at the same time as your EAP monitoring

ERR will be able to be administered from November 01, 2024, through April 14, 2025

ERR MONITORING CHANGE

ERR will be monitored as a separate process from EAP monitoring.

- This may mean agencies are monitored for ERR at a different time of year.
- The ERR monitoring will not impact an LSP's EAP monitoring; it will, however, impact the agency's risk assessment.

IHCDA reserves the right to do a technical monitoring of the work completed for ERR.

NOTIFICATIONS



- If an applicant has opted in to email communications, **LSPs will not be required to send paper notifications.**

UNUSUAL SITUATIONS? JUST ASK US!

Remember, the manual is intended to address the fundamental policies regarding EAP eligibility and the most common scenarios and issues subgrantees may encounter


- If intake or agency management encounters a situation that falls outside of the explicit guidance in this manual, they are encouraged to use the concepts contained in the manual and apply them to the specific situation.
- If the solution to the situation is still unclear, or if the subgrantee is unsure of their determination, they should reach out to IHCD via the LIHEAP inbox for clarification.
- If we see similar questions coming up multiple times, it may alert us that there is a need, and we can work on a policy guidance or a future manual revision to address it.



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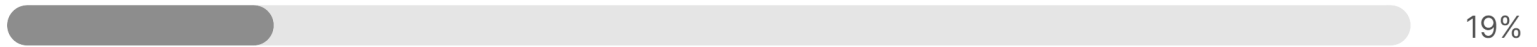


What total percentage of your sub-award may be allocated toward administrative and program costs in your program budget?

 What total percentage of your sub-award may be allocated toward administrative and program costs in your program budget?

Quiz question  69 answers  69 participants

4.5% - 13 answers



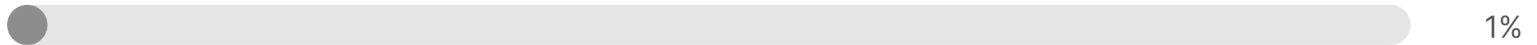
7.5% - 45 answers



12% - 10 answers 



5% - 1 answer



QUESTIONS?



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CHANGES TO FORMS



LIST OF APPENDICES

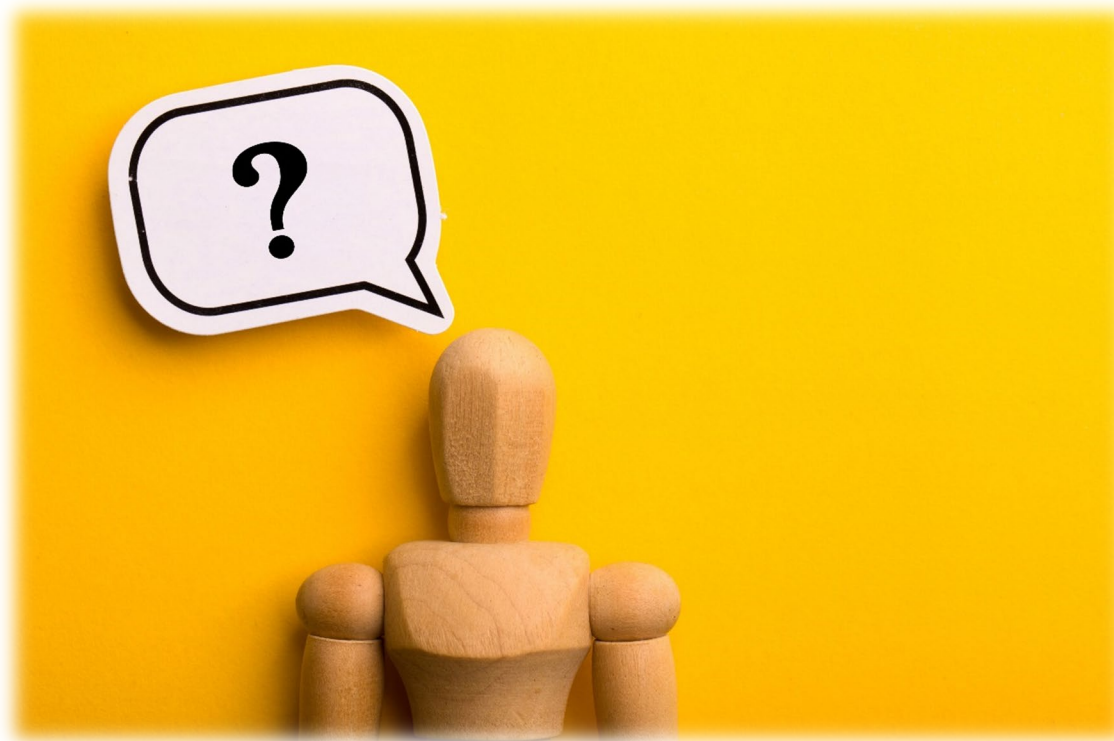
Appendix A	List of Manual Changes
Appendix B	Local Service Providers (LSPs)
Appendix C	IHCDA Community Programs Contacts
Appendix D	Federal LIHEAP Statute
Appendix E	Indiana Moratorium Legislation
Appendix F	Income Calculation Quick Reference Chart

LIST OF FORMS

Form ABS-2025	Declaration of Absent Household Members
Form ADDR-2025	Address Change Form
Form APPL-2025	EAP Application Form
Form DBPE-2025	Direct Benefit Payment Election Form
Form DIS-2025	Disability Medical Statement
Form DWD-2025	Department of Workforce Development Release of Information
Form EARN-2025	Request for Earnings Information
Form EBTR-2025	Energy Benefit Transfer Request
Form ERRCHECK-2025	Emergency Repair and Replace Checklist
Form ERRCON-2025	Emergency Repair and Replace Consent/Release of Liability Form
Form IVA-2025	Income Verification Affidavit
Form LLA-2025	Landlord Affidavit
Form MTRX-2025	EAP Benefit Matrix Form
Form UFACCT-2025	Request for Utility/Fuel Account Information
Form UTIL-2025	Utility Affidavit

CHANGES/UPDATES TO FORMS

- All forms and appendices have been updated and renamed.
- All LSPs should be sure to remove previous versions of forms and appendices from their websites and internal archives and recycle any existing hard copies of these forms. Please ensure only 2025 forms are being used this year.



QUESTIONS?