

2024-2025 HEAP Social Services District Responsibilities

Complete and return the Information Form by September 27, 2024

- Check the NYS OTDA Local District Contacts & Heating Emergency Contacts After Hours list at <http://otda.ny.gov/programs/heap/HEAP-contacts.pdf> to verify that your local district information is up to date.

Develop, implement, and submit an Outreach Plan by September 27, 2024

Submit the 2023-2024 Denied Applicant Report after September 30, 2024, and no later than October 14, 2024.

- This report tracks denials during the previous program year by income level for cases that are denied using WMS Code Y99 – Manual Denial.
- Track manual denials for the upcoming year (2024-2025), an optional tracking tool has been provided for this purpose.

Note: The Information Request Form, Outreach Plan, and Denied Applicant Report are available in electronic fillable format. Completed forms may be returned to NYSHEAP@otda.ny.gov or directly to your HEAP Bureau liaison.

Track and submit a record of erroneous payments

- Submit the Erroneous Payment Report for last year (2023-2024) after September 30, 2024, and no later than October 14, 2024.
- The HEAP Erroneous Payment Report is completed and submitted electronically by accessing the eReports link in CentraPort.
- Track erroneous payments for the upcoming year (2024-2025).

Complete and provide electronic pending reports

- Pending reports for 2024-2025 Regular HEAP applications (including Early Outreach applications) will begin September 6, 2024.
- Include pending 2023-2024 Heating Equipment Repair and Replacement and Clean and Tune applications on the weekly HEAP Pending Case Reports until September 30, 2024.
- Beginning October 4, 2024, only report pending Heating Equipment Repair and Replacement and Clean and Tune applications received on or after October 1, 2024.
- Continue to report pending 2023-2024 Cooling applications on a weekly basis until all applications for the 2023-2024 program year are complete.
- The HEAP Pending Case Report is completed and submitted electronically by accessing the eReports link in CentraPort.

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- Make necessary updates to your district's eReports users (see HEAP eReports instructions)

Inventory and order the forms that you will need

- Forms assigned State LDSS numbers are available on E-Forms and may be ordered through the forms ordering process. Forms are not drop shipped and must be ordered by the district.
- Provide forms to all your certifiers and vendors as necessary.

Establish the certification network and coordinate processing between certifiers

- Please see 02-LCM-11, which outlines basic requirements for agreements with alternate certifiers.
- The district must have a written agreement with any alternate certifier that participates in HEAP application processing, even if the district does not pay for the services. Agreements must include, at a minimum, responsibilities regarding confidentiality, processing deadlines, the prohibition on subcontracting, supervisory sign off and required timeframes for accepting applications.
- Please note that the district must retain the lead and primary responsibility for administration of the program and may not subcontract this responsibility. All agreements must be directly administered by the district.

Participate in the Early Outreach process

- Processing applications during the Early Outreach period is mandatory.
- Administrative funds were provided to support activities during the Early Outreach period.

Conduct the emergency phone application process with staffed phone lines

- Districts must establish procedures so that calls are answered, and emergencies are resolved as required.
- Maintain phone log for emergency requests.

Establish a 24-hour emergency number and procedures

Maintain an application log

- All applications received must be logged manually or in myWorkspace.