

## HEAP Systems Quick Reference Tool

### WMS Data Entry

#### Case Transaction Type (Screen1)

- 02 - Opening (only on app/tad)
- 03 - Denial (only on app/tad)
- 09 - Open/Close
- 10 - Reopening

#### Undercare Maintenance (Screen 1)

- 05 - Change
- 07 - Closing (needs a reason code)
- 14 - Closed Case Maintenance

#### Case Reason (Screen1)

#### HEAP Approval Code

- A14 - Regular Grant Only (No Funding Available)
- A50 - HEAP Approval Benefits Authorized

#### Denial and Closing Reason Codes

- E10 - Failure to Keep/Complete Interview – No Scheduled Appointment
- F01 - HEAP Excess Income
- F02 - HEAP Previously Applied for/Automatic Payment Received
- F03 - HEAP Emergency Denial - Not Customer of Record
- F04 - HEAP Emergency Denial - Not Primary Residence
- F05 - HEAP Application Not Complete or Signed
- F06 - Ineligible Non-Citizen
- F07 - Failure to Document Non-Citizen Status
- F08 - Heap Application Received After Heap Program Year Closing Date
- G72 - Failure to Provide Documentation of Switching to a Participating Vendor
- G75 - Not a Resident of District
- H95 - Deceased (HH=01 Only)
- H97 - Receiving HEAP in Another Case
- M03 - Ineligible Living Situation for HEAP
- M04 - HEAP Emergency Denial
- M06 - Insufficient Information
- M07 - Failure to Provide a Valid SSN for Household Member(S)
- M08 - HEAP HERR Denial
- M09 - HEAP Cooling Assistance Component (CAC) Denial
- M14 - HEAP Clean and Tune Denial
- W73 - Resources Available to Meet an Emergency
- W74 - HEAP Heating Equipment Repair and Replacement Denial - Resources
- Y99 - Manual Notice (Manual Notice Required)

#### Social Security Number Codes (Screen 2)

- \*\* 1 SSN Present
- \*\* 2 SSN Applied For
- \*\*\* 8 SSA Validated SSN
- \* 9 SSN Failed SSA Validation
- \* A Validation Failed: SSN Not on SSA File
- \* B Validation Failed: No Match on Name
- \* D Validation Failed: No Match on DOB

#### Social Security Number Codes (Screen 2) (cont'd)

- \* E SSA Returned Different SSN
- \* X SSA Validated SSN/Deceased
- \* System Generated \*\* Worker Entered \*\*\* Can be data-entered or system-generated

#### Gender Codes (Screen 3)

- D – Different Identity
- M – Male
- P – Prefer Not to Say
- X – X
- F - Female
- N – Non-Binary
- T – Transgender

#### Race/Ethnicity Codes (Screen 3, enter Y/N/U for each field)

#### Ethnicity

- H – Hispanic or Latino

#### Race

- I – Native American or Alaskan Native
- A – Asian
- B – Black or African American
- M – Multi-race (enter Y for every race)
- P – Native Hawaiian or Pacific Islander
- W – White
- O – Other (enter U for every race)

#### Relationship Codes (Screen 3)

#### Additional codes can be found on the WMS Code Card Index

- 01 - Applicant/Payee
- 02 - Legal Spouse
- 03 - Non-Legal Union
- 04 - Son
- 05 - Daughter
- 06 - Step-son
- 07 - Step-daughter
- 09 - Grandson/Granddaughter
- 10 - Grandmother/Grandfather
- 13 - Other Eligible Relationship (CT11, 12)
- 14 - Other Relationship (**Not** CT 11, 12)
- 15 - Legal Guardian (**Not** CT 11, 12)
- 19 - Parent
- 30 - Non-Legal Union, Child in Common

#### Categorical Codes (Screen 3)

- 09 - Single Individual or Childless Couple Age 19-64, (Not Aged or Disabled)
- 10 - Aged only (over 60)
- 11 - Blind/Both Aged and Disabled
- 12 - Disabled, Includes Blindness

#### Veteran Status Code (Screen 3)

- 1 Special Disability Veterans (Disability of 30% or More)
- 2 Vietnam-era Veteran
- 3 Disabled Veteran
- 4 Combat Theater Veteran
- 5 Recently Separated Veteran
- 6 Other Veteran
- 7 Spouse or Dependent of a Veteran
- 9 Not a Veteran

#### Individual Disposition Codes (Screen 5)

- 07 - Active
- 10 - Ineligible or Sanctioned Incrementally
- 11 - Denied
- 13 - Deceased
- 15 - Deleted
- 20 - Case Closed

#### Local Action Codes (Screen 6)

- 1 Check/ATP Issued
- 2 Prepare and Issue Check/ATP
- 4 Release
- 5 Cancel
- 6 Other
- 7 Replacement Check/ATP Issued
- 8 Prepare and Issue Replacement Check/ATP
- 9 Void

#### Payment Type Codes (Screen 6)

- H0 - Heating Equipment Repair/Replacement Estimate
- HX - HEAP Regular Benefit Heat Included
- H1 - HEAP Regular Benefit Heater
- H2 - HEAP Cooling Benefit
- H5 - HEAP Emergency Benefit-Repair Heating Equip.
- H6 - HEAP Emergency Benefit-Shelter/Relocation
- H7 - HEAP Emergency Benefit-Replace Heating Equip.
- H8 - HEAP Emergency Benefit-Propane Tank Deposit
- H9 - HEAP Supplemental Benefit
- J1 - HEAP Emergency Benefit-Additional Benefit
- J2 - HEAP Reissue Benefit
- J3 - Clean & Tune
- J9 - HEAP Additional Benefit
- NX - HEAP Nominal Benefit
- 04 - HEAP Emergency Benefit-Non-Utility
- 16 - HEAP Emergency Benefit-Domestic Heat-Related Utility
- 17 - HEAP Emergency Benefit-Utility

**Method of Payment Codes (Screen 6)**

- 01 – Unrestricted
- 02 - Vendor as Authorized
- 04 - Vendor as Billed Subject to Limit
- 09 - Restricted
- 11 - Vendor Line of Credit – HEAP

**Issuance Code (Screen 6)**

Must always be 2 – Once only

**Pick Up Codes (Screen 6)**

- 1 - Mailed
- 6 - Other

**Special Claiming Code (Screen 6)**

H – is required for HEAP Prevention Payments  
 G – is required for HEAP Restoration Payments

**HEAP ABEL Budgeting**

**HEAP Budget**

From the WMS Main Menu or Application and Case Inquiry Screen, Hit "F1" to get to the WMS Budget Calculation (ABEL) Menu.

Enter Function 10 (for HEAP Budget) & Case # or Reg.#

If HEAP Budget (output) screen is displayed, hit F2-(Not Ctrl) to change or correct current budget

Ctrl/F3-To store a budget

Ctrl/F5-to go back to ABEL Menu with Case / Reg. Number Retained

Ctrl/F6 to go back to ABEL Menu without Case / Reg. Number

**WMS ABEL Codes Automated HEAP Benefit Calculation**

**Case Type 11, 12, 16, 17, 19, 31 & 60**

**Fuel Type:**

- 0 Heat Included
- 1 Natural Gas
- 2 Oil
- 3 PSC Electric
- 4 Coal
- 5 Wood
- 6 Kerosene
- 7 Propane
- 8 Municipal Electric
- 9 Other Fuel

**Benefit Type:**

- R - Regular
- E - Emergency
- B - Both Regular and Emergency
- D - (Dollar \$21) Heat & Eat
- C - Cooling

**Renter's Benefit Received (RECD)**

- X - Tier I
- W - Tier II
- D - \$21

**Vulnerable (VULN IND):**

- Y (Yes denotes a case member as under 6, 60 & over or disabled)
- N (No is used for all other situations)

**HEAP Categorical Eligibility Indicator (CE IND):**

- Y - Yes
- N - No

**Shelter Types (SHELT TYPE):**

**Eligible**

- 01 - Rent Private (Incl. Lot Rent or Commercial Room)
- 02 - Rent Public
- 03 - Own Home (Incl. Trailer)
- 05 - Hotel/Motel Permanent
- 07 - Migrant Labor Camp
- 10 - Congregate Care Level II-Drug/Alcohol Treatment Facility (Residential Treatment Center)
- 12 - Non-Level II Alcohol Treatment Facility (u)
- 13 - State Operated Community Residence (FS Only)
- 15 - Congregate Care Level I-Family Care
- 16 - Congregate Care Level II-Not Drug/Alcohol Treatment or Apartment-like
- 17 - Congregate Care Level II-Apartment-like (OMH/OPWDD Supportive/Supervised Apartments)
- 20 - Rental Supplement (u)
- 38 - Subsidized Housing (Non-Certificate)
- 39 - Section 8 Voucher (Up to Agency Max)
- 40 - Section 8 Voucher (30% Limit) (Districts 13, 28, 33, 37, 39, 47, 48, 51, 55 & 66 Only)
- 42 - Congregate Care Level III-Adult Home and Enriched Housing

**Not Eligible (continued)**

- 04 - Room & Board (PA Only)
- 06 - Hotel/Motel Temporary (u)
- 09 - Medical Facility (\$40 PNA only) (u) (PA Only)
- 11 - Non-Commercial Room Only
- 19 - Tier II Family Shelter (3 Meals/Day) (u)
- 21 - Shelter for Homeless (3 Meals/Day) (u)
- 22 - Residential Program for Victims of Domestic Violence (3 Meals/Day) (u)
- 23 - Undomiciled
- 33 - Homeless Shelter Tier II (Less Than 3 Meals/Day) (u)
- 36 - Shelter for Homeless (Less Than 3 Meals/Day) (u)
- 37 - Residential Program for Victims of Domestic Violence (Less Than 3 Meals/Day) (u)
- 44 - Supportive/Specialized Housing (District 55 Only) (PA Only)
- 98 - SSI Shelter Cost and SUA Unknown

**Income Frequency (FRQ):**

- W - If paid weekly (ABEL multiplies by 4.333333)
  - B - If paid bi-weekly (ABEL multiplies by 2.166666)
  - M - If paid monthly
  - S - If paid semi-monthly
- Last two digits are for cents. Use '00' for whole dollars (i.e. 14500 = \$145.00). ABEL doesn't support decimal points.

**Emergency Type:**

- A - Heat-Related Domestic
- B - Natural Gas-Heat Only
- C - Natural Gas-Heat & Heat Related Domestic
- D - Electric Heat
- E - Non Utility Fuel
- F - Non Utility Fuel & Heat Related Domestic
- G - Furnace Repair
- H - Propane Reconnect
- J - Furnace Replacement
- K - Municipal Electric Primary Heat Source
- L - Municipal Electric Heat Related Domestic
- M - Relocation
- N - Estimate

**HEAP Payment History (Tracking):**

From the main menu (Ctrl F6):  
 Selection 17 or (Ctrl F7 from other screen)  
 Then enter J  
 Then SSN or CIN