

This desk guide provides information to ensure payment and avoid Crisis rejections.

1. Accurate Data Entry in PROMISE™ and subsequent Documentation:

- When Crisis funds are authorized for a fuel delivery or utility termination and the Crisis will be resolved by using both Cash and Crisis funds, data entry in PROMISE™ should be **only the amount being paid with Crisis funds**. Indicate LIHEAP Cash and Supplement funds by subtracting them on the documentation and the balance paid with Crisis funds.
 - For example: The delivery total is \$562.32. LIHEAP Cash grant is \$125. On the delivery ticket, indicate and subtract \$125 from the total delivery (write Cash Grant next to the \$125). Indicate Crisis next to the remaining balance of \$437.32 and data enter \$437.32 for payment in PROMISE™.
- **Don't round off the cost of the delivery.** If you delivered \$483.42 in fuel oil, indicate \$483.42 in PROMISE™ for that authorization. Not \$483, not \$484 and not \$500.
- The 2016/17 LIHEAP Crisis Benefit has a season maximum of \$500 per household.

2. Timely Submission within 30 days:

- Remember to submit documentation with a metered delivery ticket or utility termination/restoration within 30 days of authorization by the CAO. This will help to ensure prompt payment and will allow the CAO to authorize another Crisis if requested.

3. Preparing Documents for Submission:

- Write the first/last name of the individual who was authorized for Crisis OR the Authorization Number OR the Attachment Control Number on the documentation to ensure that the authorization in PROMISE™ is linked to your delivery ticket/utility termination notice. This is especially important when the names do not match.
- Do not write on the LIHEAP Cover Sheet.
- Make sure the documentation you submit (delivery ticket/utility termination) is legible. If the document is illegible (too light, blurry, too dark) take appropriate steps to make them legible before you submit them to prevent the claim from being rejected.
- Only use Black or Dark Blue ink. (Red ink is too light and is illegible when sent by fax.)
- Don't use a highlighter as it can cover up the text that was intended to be highlighted.
- Submit attachments on a full 8 ½ X 11 sheet of paper by either photocopying the delivery tickets or by taping them onto the 8 ½ X 11 sheet. Submitting documents in this manner will ensure that they are safely/accurately scanned upon receipt.
- Do not staple, tape or paper clip attachments to the Cover Sheet.

Failure to follow this guidance may cause you to receive a rejection letter.

4. Submitting Documentation Using the Upload Feature in PROMISE™:

- Crisis Payments are queued based on receipt of documentation. The quickest way to submit the paperwork is by attaching delivery tickets/termination documentation to PROMISE that you have stored on your computer or flash drive as a PDF file.
- The Upload screen displays the following:

Upload instructions:

1. Click the Browse button. Search and select a PDF file for this Crisis Auth # and click *Add*.
 2. Attach additional PDF files for this Crisis Auth # by repeating Step 1 (max of 3 PDF files).
 3. Confirm that the PDF files you added relate to this specific customer and Authorization #.
 4. The message *Successfully Uploaded Attachments* will confirm that the upload process has been completed.
- Another enhancement to PROMISE is the addition of 'pop-up' warning messages. These messages will appear when data entry on either the Claim Submission Page or Upload Page is not complete.
 - The first line of the message will say, "*Are you sure you want to leave this page*".
 - On the *Upload page* a 2nd line will state, "*PDF file(s) was not successfully submitted*".
 - On the *Claim Submission Page* a 2nd line will state, "*Claim was not successfully submitted*".

5. Submitting Document by Mail or Fax:

- Only submit documentation one way! Do not fax and also mail LIHEAP Crisis paperwork for the same authorization. This causes confusion and duplication of work.
- **Sequence:** Make sure documentation is in this sequence when sending by fax or mail:
 - **First:** LIHEAP Cover Sheet for recipient #1
 - **Second:** Documentation: Metered Delivery Ticket/Termination Notice for recipient #1
 - **Third:** any supporting document to validate the delivery/termination

Repeat this sequence for every Crisis Authorization #

- **When faxing attachments:**

- Avoid sending blank pages by making sure all of the documents are facing the same way and are placed face-up or down depending on your fax machine
- The maximum fax per transmission is 30 unique Crisis Authorizations. The fax machine identifies 30 authorizations by reading 30 separate LIHEAP Cover Sheets.
- Be sure that a Crisis Cover Sheet, specific to the delivery or termination, is in-between each documentation.