

1. **Search for a customer or authorization # using the Worklist feature on PROMISE™.** The Worklist contains all active and in-progress Crisis Authorizations. Vendors can navigate from the Worklist to the data-entry screen in PROMISE™ and then return to the Worklist to locate another customer. Refer to the [Worklist Desk Guide](#) for screen shots and instructions.

2. Accurate data entry in PROMISE™

- Customer credits must be data-entered in PROMISE™ where they will be subtracted from the total amount of the delivery or termination.

Example: The delivery total is \$462.32. The LIHEAP Cash grant of \$125 is a credit on the customer's account. On the delivery ticket, indicate and subtract \$125 from the total delivery. **NEW in 2020**, enter the \$125 LIHEAP credits in PROMISE. **PROMISE™ will subtract the credits and submit the remainder to be paid in LIHEAP Crisis funds.**

- **Don't 'round' the cost of the delivery.** If you delivered \$783.42 in fuel oil, indicate \$783.42 in PROMISE™ for that authorization. Not \$783, not \$784 and not \$800.

NOTE: Check the customer account number. You can change it if it is incorrect!

1. **IMPORTANT:** A 'pop-up' warning message will appear if you attempt to leave the Claim Submission Page when the claim is in a DENIED status. **Look for these messages within the 'pop up':**

- The first line of the message will say "Are you sure you want to leave this page?"
- A 2nd line will say "Claim was not successfully submitted."

Only claims with accurate supporting documentation will be paid. **For DENIED claims**, correct the fields in error and then resubmit the claim.

3. Submitting documentation within 30 days:

- Crisis claims aren't paid until legible documentation is received.
- To ensure prompt payment, remember to submit documentation (metered delivery ticket or utility termination notice) within 30 days of CAO authorization.
- The CAO can't initiate another Crisis Auth # until the previous one is in PAID status.

4. Preparing documents for submission:

- **IMPORTANT:** To ensure the documentation links to the data entry in PROMISE™, write the name of the individual on the cover sheet OR the 10-digit authorization number OR the Attachment Control Number on the documentation before you submit it. **This is especially important when the names do not match.**
- **NEVER write on the LIHEAP Cover Sheet.**
- Make sure the documents you submit (delivery ticket/utility termination) are legible. If too light, grainy, smudged, blurry or too dark, take steps to make them legible before you submit them to prevent your supporting documentation 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.
- **Don't attach or copy the documentation onto the bottom of the cover sheet.**

- 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.

5. Submitting documentation using the upload feature in PROMISE™:

- Crisis payments are queued based on receipt of documentation. The quickest way to submit documentation is by attaching delivery tickets/termination notices to PROMISE™ that are stored on your computer or flash drive as a PDF file.
NOTE: Establish a file-naming convention that includes the Auth # and customer name. This will help you locate the correct file. Keep a separate file for each LIHEAP season.
- The Upload screen displays these **upload instructions:**
 1. Click the *Browse* button. Search and select a PDF file for this Crisis Auth #. Click the *Open* button, then click the *Add* button.
 2. Attach additional PDF files for this Crisis Auth # by repeating Step 1 (max 3 PDF files).
 3. Confirm the PDF files you added relate to this specific customer and Authorization #.
 4. Click the *Submit Attachment(s) or Re-Submit Attachment(s)* button.
 5. The message *Successfully Uploaded Attachments* will confirm that the upload process has been completed.
 6. **IMPORTANT:** A 'pop-up' warning message will appear if you attempt to leave the Upload page after adding one or more files to the staging area without transmitting them. Without successfully processed LIHEAP attachments to support your claim, **the claim will not be paid. Look for these messages within the 'pop up':**
 - The first line of the message will say, "Are you sure you want to leave this page".
 - A 2nd line will state, "PDF file(s) was not successfully submitted".

6. Tips for submitting documentation by other methods:

- **Only submit documentation one way!** Don't fax and mail the same documentation.
- **Mail or fax sequence:** Make sure documentation is in this sequence:
 - **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 #.

- **Faxing attachments:**
 - **Do not use your company's fax cover sheet when sending LIHEAP documents.**
 - **Make sure all documents are facing the same way** and are placed face-up or face-down depending on your fax machine to avoid sending blank pages.
 - **The maximum fax per transmission is 30 pages.** The fax machine will read and separate claims by each LIHEAP Cover Sheet. So, be sure that a LIHEAP Cover Sheet, specific to the delivery or termination, is placed in-between each documentation.
- **SeGOV/MOVEit:** If you receive LIHEAP vouchers (remittance advice) by SeGOV (MOVEit), you can now upload Crisis documentation to SeGOV, which will convey it to PROMISE. Contact the Vendor Unit at RA-LIHEAPvendors@pa.gov to set up this process.