

Using **Microsoft Edge**, search for a customer or authorization # using the Worklist link.

NOTE: Other search engines; Firefox, Safari, Google Chrome can be incompatible w/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. The Worklist is refreshed with the submission of every claim.

If you receive an error when requesting an Attachment Control Number stating the ACN Exists, click on the Search button.

Data Entry Accuracy is essential.

- **ALWAYS enter the energy PRODUCT as the first Service Code.**
- Don't 'round' the cost of the delivery. If you delivered \$783.42 in fuel oil, indicate \$783.42 in PROMISE™ as the total delivered for that authorization. Not \$783, not \$784 and not \$1000.
- Check the customer account number. You can change it if it is incorrect!
- Decimals are required when entering Units of Measure, Price Per Unit, and Amt billed to LIHEAP.
- Y9012 Service Code allows a vendor to include LIHEAP Cash grant credits or other payments made by the customer or other agency towards a minimum delivery. Credits/payments must be data entered in PROMISE™ where they will be subtracted from the total amount of the delivery. The remaining balance will be paid in LIHEAP Crisis funds.

Example: Total delivery is \$462.32. There's a \$125 LIHEAP Credit on the customer's account. Enter the \$125 LIHEAP credit with Service Code Y9012 in PROMISE. PROMISE™ will subtract the credits.

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

- The popup message will say: "*Leave site? Changes you made may not be saved*"
- Before leaving the claims page, correct the fields and resubmit the claim

Submitting documentation within 30 days:

- Crisis claims aren't paid until legible documentation is received.
- To ensure prompt payment, submit documentation (metered delivery ticket or utility termination notice) within 30 days of CAO authorization.

Preparing documents for submission:

- **VERY IMPORTANT:** The last name of the person listed on the cover sheet must exactly match your delivery ticket. If it doesn't, write the name of the individual listed on the cover sheet OR the 10-digit authorization number on your documentation before you submit it.
- NEVER write on the LIHEAP Cover Sheet.
- Make sure your documents are legible (delivery ticket/utility termination). If too light, grainy, smudged, blurry or too dark, make them legible before you submit them to prevent your supporting documentation from being rejected.
- Use only 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 use staples or copy the documentation onto the bottom of the cover sheet.

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 uploading delivery tickets/termination notices 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:

- Click on *Choose files*. Search and select a PDF file for this Crisis Auth #. Click the *Open* button, then click the *Add* button.
- Attach additional PDF files for this Crisis Auth # by repeating Step 1 (max 3 PDF files).
- Confirm the PDF files you added relate to this specific customer and Authorization #.
- Click the *Submit Attachment(s) or Re-Submit Attachment(s)* button.
- The message *Successfully Uploaded Attachments* will confirm the success of the upload process

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 clicking SUBMIT. Without submitting the documentation, 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".

Tips for submitting documentation by other methods:

- Only submit documentation one way! Don't upload and fax documentation for the same claim
- Make sure documentation is in this sequence when you fax or mail:
 - First, LIHEAP Cover Sheet for recipient #1;
 - Second, documentation: metered delivery ticket/termination notice for recipient #1;
 - Third, any additional supporting document to validate the delivery/termination.
 - Repeat this sequence for every Crisis Authorization # up to 30 total 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.
- NEVER 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 or upside-down documents.
- Taking a photo of a delivery ticket with your phone uses .jpeg format. When uploading in PROMISE or when emailing a delivery ticket to the vendor unit, be sure to put the .jpeg onto a word document and convert it to a PDF.