

EHEAP REQUIRED DATA ENTRY IN CIRT S

1. An Emergency Home Energy Assistance for the Elderly (EHEAP) Application is required to be completed for individuals seeking energy assistance. If the applicant is not found in CIRT S, enter the applicant's demographic information from the EHEAP application. If the applicant already exists in CIRT S, skip to numbers 2 – 5 below. No new rows are added and the data is over-written.

ADD_CLIENT_INFO		20130618		C I R T S		Date	06/19/2013	User	CIRTADMIN
PSA	Owner ID	SSN	Client ID	First Name	Last Name	<input checked="" type="checkbox"/> Demographic Complete			
02	20009	201306194	1001140951	JANE	DOE	<input type="checkbox"/> PAS Complete			
						<input type="checkbox"/> Open Case			
						<input type="checkbox"/> Open Enrollment			
A. DEMOGRAPHIC SECTION									
SSN	Owner ID	First Name			M.I. Last Name				
201306194	20009	JANE			DOE				
Medicaid Number	Best Contact Telephone Number		Date of Birth		Date of Death	Sex			
			07/19/1919			FEMALE			
Race: (Mark all that apply):									
<input type="checkbox"/> White			<input type="checkbox"/> Black / African American			<input type="checkbox"/> Asian			
<input type="checkbox"/> American Indian/Alaskan Native			<input checked="" type="checkbox"/> Native Hawaiian/Pacific Islander			<input type="checkbox"/> Other			
Race Description									
Ethnicity		Primary Language		Primary Language Description					
HISPANIC / LATINO		ENGLISH							
Does client have limited ability reading, writing, speaking, or understanding English?						Marital Status			
N						WIDOWED			
Physical Location Home Address Mailing Address Contact Person(s)									
Home Address									
Copy Physical Location						Date of Last Change			
						06/19/2013			
Street		101 TEST AVENUE							
Street con't.									
ZIP		32301		ZIP 4					
City		TALLAHASSEE							
County		LEON		State		FL			
Telephone Number									
Is client's home address public housing?						N			
Address History									
Search LOC Referrals NHD Assessments Change Owner Change SSN Delete Client									
Change PSA									

2. Household Annual Income

- Go to Additional Client Information screen
- Enter Y to **"Incomes?"**
- Enter HAI = Household Annual Income for Type.
- Enter Household Annual Income for Amount. Do not enter "\$0.00" for the Amount unless the client's income is truly "\$0.00."

The screenshot shows the CIRCLES client information screen. The main window is titled 'CIRCLES' and has a menu bar with 'Action', 'Menu', 'Edit', 'Block', 'Field', 'Record', 'Query', and 'Help'. Below the menu bar is a toolbar with various icons. The main area is divided into several sections:

- Client Information:** Includes fields for 'PSA' (02), 'SSN' (201105061), 'Intake Date', 'Medicaid #', 'Client Id' (2001743817), 'First Name' (TEST), 'MI', and 'Last Name' (EHEAP).
- Addresses:** Includes a dropdown for 'Addresses?' (N), 'Birth Date' (04/17/1947), and 'DOBV'.
- Demographics:** Includes 'Sex' (F), 'Race' (B - BLACK), and 'Ethnicity' (O - OTHER).
- CLIENT INCOMES & ASSETS:** A sub-window with a table for recording income and assets.
- Summary:** Includes 'Incomes?' (Y), 'EHEAP?' (N), 'Earliest Intake Date', and 'PSA Codes?' (N).
- Footer:** Includes a text box for 'Enter Code for Income Type (F9 for List) - Required', a 'Record: 1/1' indicator, and a '<OSC>' button.

PSA	Type	Income/Asset Code	Amount	More?
02	HAI	N = \$2001 - \$5000	\$12,345.00	N

3. Child who is age 5 or younger living in the household

- a. On the Additional Client Information screen, enter Y to "PSA Codes?"
- b. Enter EHEAP for PSA Table.
- c. Enter the PSA code (F9 for a list of values). Choose from the following values:
 - i. HM5N = NO CHILD AGE 5 OR YOUNGER
 - ii. HM5Y = CHILD AGE 5 OR YOUNGER

The screenshot shows the CIRT client information screen. The main window has a blue header with the CIRT logo and a title bar. Below the header is a menu bar with options: Action, Menu, Edit, Block, Field, Record, Query, Help. A toolbar with various icons is below the menu bar. The main content area displays client information for CIRCIENT_1226, VERSION 100.1, CIRT S, CLIENT DISPLAY AND LIMITED UPDATE, Date 05/06/2011, and User CIRTADMIN. The client information is organized into sections: PSA (02), SSN (201105061), Intake Date, Medicaid #, Client Id (2001743817), First Name (TEST), MI, Last Name (EHEAP), Address, PSA CODES, Cit, Hosp/E, Refr, Contacts, Handicaps, and Earliest Inta. A dialog box titled "PSA Unique Codes" is open, showing a list of PSA codes and their descriptions. The list has two columns: Description and Psa Code. The first row is "CHILD AGE 5 OR YOUNGER" with Psa Code "HM5Y". The second row is "NO CHILD AGE 5 OR YOUNGER" with Psa Code "HM5N". The dialog box also has a "Find %" field and buttons for Find, OK, and Cancel.

PSA	PSA Table	PSA Code	PSA Code Description	More?
02	EHEAP	HM5Y	CHILD AGE 5 OR YOUNGER	N

Description	Psa Code
CHILD AGE 5 OR YOUNGER	HM5Y
NO CHILD AGE 5 OR YOUNGER	HM5N

4. Number of persons living in the household

- a. On the Additional Client Information screen, enter Y to "PSA Codes?"
- b. Enter EHEAP for PSA Table.
- c. Enter the PSA code (F9 for a list of values). Choose from the following values:
 - i. HM1 = ONE HOUSEHOLD MEMBER
 - ii. HM2 = TWO HOUSEHOLD MEMBERS
 - iii. HM3 = THREE HOUSEHOLD MEMBERS
 - iv. HM4 = FOUR HOUSEHOLD MEMBERS
 - v. HM5 = FIVE HOUSEHOLD MEMBERS
 - vi. HM6 = SIX HOUSEHOLD MEMBERS
 - vii. HM7 = SEVEN HOUSEHOLD MEMBERS
 - viii. HM8 = EIGHT HOUSEHOLD MEMBERS
 - ix. HM9 = NINE HOUSEHOLD MEMBERS
 - x. HM10 = TEN HOUSEHOLD MEMBERS
 - xi. HM11 = ELEVEN HOUSEHOLD MEMBERS
 - xii. HM12 = TWELVE HOUSEHOLD MEMBERS

CIRTS

CICLIENT

Action Menu Edit Block Field Record Query Help

CICLIENT_1226
VERSION 10G.1

CIRTS
CLIENT DISPLAY AND LIMITED UPDATE

Date: 05/06/2011
User: CIRTSADMIN

PSA	SSN	Intake Date	Medicaid #
02	201105061		

Client Id	First Name	MI	Last Name
2001743817	TEST		EHEAP

Address

PSA CODES

PSA	PSA Table	PSA Code	PSA Code Description	More?
02	EHEAP	HM5Y	CHILD AGE 5 OR YOUNGER	Y
	EHEAP	HM5	FIVE HOUSEHOLD MEMBERS	N

Cit

Hosp/E

Refr

Contacts ? N Comments ? N Languages ? N

Handicaps ? N OAA ? N SSI ? N Medicaid Waiver ? N EHEAP ? N

Earliest Intake Date PSA Codes ? Y

Enter "Y" to Enter Another PSA Code, "N" to Return to Client Screen

Record: 2/2 ... <OSC>

Handicapped members living in the household

- a. On the Additional Client Information screen, enter Y to “EHEAP Codes?”
- b. Choose from the following values:
 - i. Y = Handicapped Household Member
 - ii. N = No Handicapped Household Member

CIRT S

CLIENT DISPLAY AND LIMITED UPDATE

PSA: 02 SSN: 201105061 Intake Date: Medicaid #: Client Id: 2001743817 First Name: TEST MI: Last Name: EHEAP

Addresses ? ☐ Birth Date: 04/17/1947 DOBV: Sex: F Race: B - BLACK Ethnicity: O - OTHER

Citizen: Marital Status: M - MARRIED

Hosp/Emerg: Emerg: Refri Src: Incomes ? ☐ N

Contacts ? ☐ N Comr: Handicaps ? ☐ N OAA ? ☐ N SSI ? ☐ N Medicaid Waiver ? ☐ N EHEAP ? ☐ Y

Earliest Intake Date: PSA Codes ? ☐ N

Enter Code for Most Often Used Fuel (F9 for List) - Required

Record: 1/1 ... List of Valu... <OSC>

EHEAP

Household Income - Monthly (EHEAP): Most Often Used Fuel: Handicapped Household Member(s): ☐ Y

5. EHEAP Client Enrollments

- Enter the program status of GOAH = GOAL ACHIEVED if the client is served.
- Enter the program status of TRNE = TERMINATED CLIENT NOT ELIGIBLE.
- Enrollment Date = CASEWORKER SIGNATURE DATE.

CIENROLL		CIRTS				Date	06/19/2013		
20130606		CLIENT ENROLLMENTS				User	CIRTSADMIN		
(Press Ctrl+Page Down to access Waitlist)									
PSA	02	SSN	201306194	Client Id	1001140951	DOB	07/19/1919	Owner ID	20009
First Name			MI	Last Name					
JANE				DOE					

PSA	Program Comp.	Status	Enrollment		Elig. Code	Provider	Loc	Worker
			Start	End				
02	EHEAP	GOAH	06/19/2013	06/19/2013	AGE	20009	01	CIRTSADMIN

EHEAP ENROLLMENTS AND EXCEPTIONS REPORT

This report can be found at [Enterprise Application Services, CIRT Reports, Monitoring section](#).

When running this report, select the following:

1. PSA: Enter the PSA
2. Provider: Enter ALL PROVIDERS or a specific provider
3. Location: Enter ALL LOCATIONS or a specific location
4. Program: Enter EHEAP or EHEAW (for Weather-Related, when available)
5. City: Enter ALL CITIES
6. Poverty Line: Enter **11,490 (for 2013)**
7. Poverty Line Increment for each additional household member: Enter **4,020 (for 2013)**
8. Start and End Date: Enter the start and end dates for the reporting period

The Annual Poverty Level must be entered when you run the EHEAP Enrollments and Exceptions report. The current income limits can be found at the Poverty Guidelines website:
<http://www.aspe.hhs.gov/poverty/index.shtml>

The screenshot shows a web browser window titled "CIRT Report - Mozilla Firefox". The address bar displays the URL: https://199.250.26.79/reports/cirts/pf_eheap_exceptions.jsp?cmdkey=cirts_pf. The page content includes the "DEPARTMENT OF ELDER AFFAIRS STATE OF FLORIDA" logo and the heading "CIRT Reports". Below this is the title "EHEAP Enrollments and Exceptions". The "Report parameters:" section contains the following fields:

- PSA: 01
- Provider: ALL PROVIDERS
- Location: ALL LOCATIONS
- Program: ALL PROGRAMS
- City: ALL CITIES
- Poverty Line: 11490
- Poverty Line Increment for each additional household member: 4020
- Start Date(MM/DD/YYYY): 04/01/2013
- End Date(MM/DD/YYYY): 06/30/2013
- Include SSN or Client ID?: Client ID
- Output Format: PDF

At the bottom of the form are two buttons: "Run Report" and "Reset". The status bar at the bottom of the browser window shows "Done".

Highlights of the EHEAP report include the following:

1. Annual Household Income is displayed.
2. The Adjusted Poverty Line (using the EHEAP PSA codes HM% to determine the household size) and the percent of poverty line are shown.

For example, if a client has a four member household with household annual income of \$10,000, the annual poverty line is \$11,490 and the additional amount per person is \$4,020, then the adjusted poverty level is $11,490 + (4,020 \times 3) = 23,550$. The percent of poverty line will then be $(10,000/23,550) = 42.46$ percent.

The provider must obtain a statement from the client as to how basic expenses are met for any client whose income is less than 50 percent of the Poverty Guidelines.

Household gross income must be 150 percent or below the Poverty Level in order to be "GOAH". Clients whose income is over 150 percent of the Poverty Level must be "TRNE."

If a client is missing the Household Annual Income or the number of persons living in household, they are counted in the "No Income Data" total at the report end and "*****" is shown in the column where the data is missing. "*****" is shown in the column where other required data is missing. The data will need to be corrected prior to submission of the report.

SAMPLE REPORT DETAIL - TO BE SUBMITTED AS THE REQUIRED HOUSEHOLD REPORT

EHEAP Enrollment and Exception Statistical Report
for Period 01/01/2011 - 06/30/2011

All Providers
All Locations
All Programs
All Cities

PSA: 02

Annual Poverty Line: \$10,890 \$3,820 for each additional household member

County: BAY

Provider Location	Client Name	Client ID	Program Status	End Enrollment	Age	HAI	Handicap Member	Child Under 5	# in House	Adjusted Poverty Line	% of Poverty Line
20001 01	EHEAP, TEST	2001743747	GOAH	01/11/2011	66	FS	*****	*****	HM4	22350	> 150%
20001 01	TESTING, MORE	2001743532	GOAH	02/01/2011	60	*****	Y	*****	*****		NO DATA

Count by County: 2

County: LEON

Provider Location	Client Name	Client ID	Program Status	End Enrollment	Age	HAI	Handicap Member	Child Under 5	# in House	Adjusted Poverty Line	% of Poverty Line
20009 01	DOE, JJ	2001743671	GOAH	01/11/2011	98	\$14,000.00	*****	*****	*****		NO DATA
20009 01	EHEAP, TEST	2001743817	GOAH	05/06/2011	64	\$0.00	Y	HMSY	HM5	26170	0.00%
20009 01	TEST, TEST	2001743748	GOAH	01/11/2011	79	FS	*****	*****	*****		> 150%
20009 01	TEST, UNDER60	2001743819	TRNE	02/04/2011	***	\$13,102.00	N	HMSY	HM3	18530	70.71%

Count by County: 4

County: TAYLOR

Provider Location	Client Name	Client ID	Program Status	End Enrollment	Age	HAI	Handicap Member	Child Under 5	# in House	Adjusted Poverty Line	% of Poverty Line
20019 01	EHEAP, TEST	2001743839	GOAH	03/17/2011	87	\$12,345.00	Y	*****	HM9	41450	29.78%
20019 01	TRNE, TESTING	2001743818	TRNE	04/05/2011	79	*****	*****	*****	HM2	14710	NO DATA

Count by County: 2

Total by PSA: 8

Report run on: 13-MAY-11 04:34 PM

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Report run by: CIRTADMIN



EHEAP Enrollment and Exception Statistical Report
for Period 01/01/2011 - 06/30/2011

All Providers
All Locations
All Programs
All Cities

PSA: 02 Annual Poverty Line: \$10,890 \$3,820 for each additional household member

Assisted Household Report	BAY	CALHO UN	FRANK LIN	GADSD EN	GULF	HOLME S	JACKS ON	JEFFER SON	LEON	LIBERT Y	MADIS ON	TAYLO R	WAKUL LA	WASHI NGTON	TOTAL
1. # of Household Assisted	2	0	0	0	0	0	0	0	3	0	0	1	0	0	6
2. Households Assisted With Gross Income:															
A. Under 75% Poverty:	0	0	0	0	0	0	0	0	1	0	0	1	0	0	2
B. 75% - 100% Poverty:	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C. 100% - 125% Poverty:	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
D. 125% - 150% Poverty:	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
E. Over 150% Poverty:	1	0	0	0	0	0	0	0	1	0	0	0	0	0	2
F. No Income Data Avail. or Not Enough Info. :	1	0	0	0	0	0	0	0	1	0	0	0	0	0	2
3. Households with at least One member:															
A. 60 Years or older	2	0	0	0	0	0	0	0	3	0	0	1	0	0	6
B. Disabled	1	0	0	0	0	0	0	0	1	0	0	1	0	0	3
C. Age 5 years or under	0	0	0	0	0	0	0	0	2	0	0	0	0	0	2
D. Under 60 Years Old	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
4. Undup. Households Assisted	2	0	0	0	0	0	0	0	3	0	0	1	0	0	6
Applicant Household Report															
# of Applicant Households	2	0	0	0	0	0	0	0	4	0	0	2	0	0	8
A. Under 75% Poverty:	0	0	0	0	0	0	0	0	2	0	0	1	0	0	3
B. 75% - 100% Poverty:	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
C. 100% - 125% Poverty:	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
D. 125% - 150% Poverty:	0	0	0	0	0	0	0	0	0	0	0	0	0	0	0
E. Over 150% Poverty:	1	0	0	0	0	0	0	0	1	0	0	0	0	0	2
F. No Income Data Avail. or Not Enough Info. :	1	0	0	0	0	0	0	0	1	0	0	1	0	0	3

Report run on: 13-MAY-11 04:34 PM

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Report run by: CIRTADMIN

The report's last page summarizes the client information by county using the provider location county served (not the client's home address). It is the AAA's responsibility to ensure clients in all counties in the PSA receive EHEAP assistance.

Assisted Household Report, "2.E. Over 150% Poverty" row: With the elimination of automatic eligibility, this number should be zero. If there are numbers in this row, refer to the detailed report to correct the data prior to submission of the report.

Assisted Household Report, "2.F. No Income Data Available or Not Enough Info." row: If there are numbers in this row, refer to the detailed report to see which client(s) is missing data. The data will need to be corrected prior to submission of the report.

Assisted Household Report, Households with at least one member, "3.D. Under 60 Years Old" row: If there are numbers in this row, refer to the detailed report to see which client(s) is under 60. The data will need to be corrected prior to submission of the report.

If EHEAP and EHEAW are being reported for the same period, run the report twice, once for each program, and both submit to DOEA.