

COUNTY OF HIDALGO  
COMMUNITY SERVICE  
AGENCY

Service Delivery System

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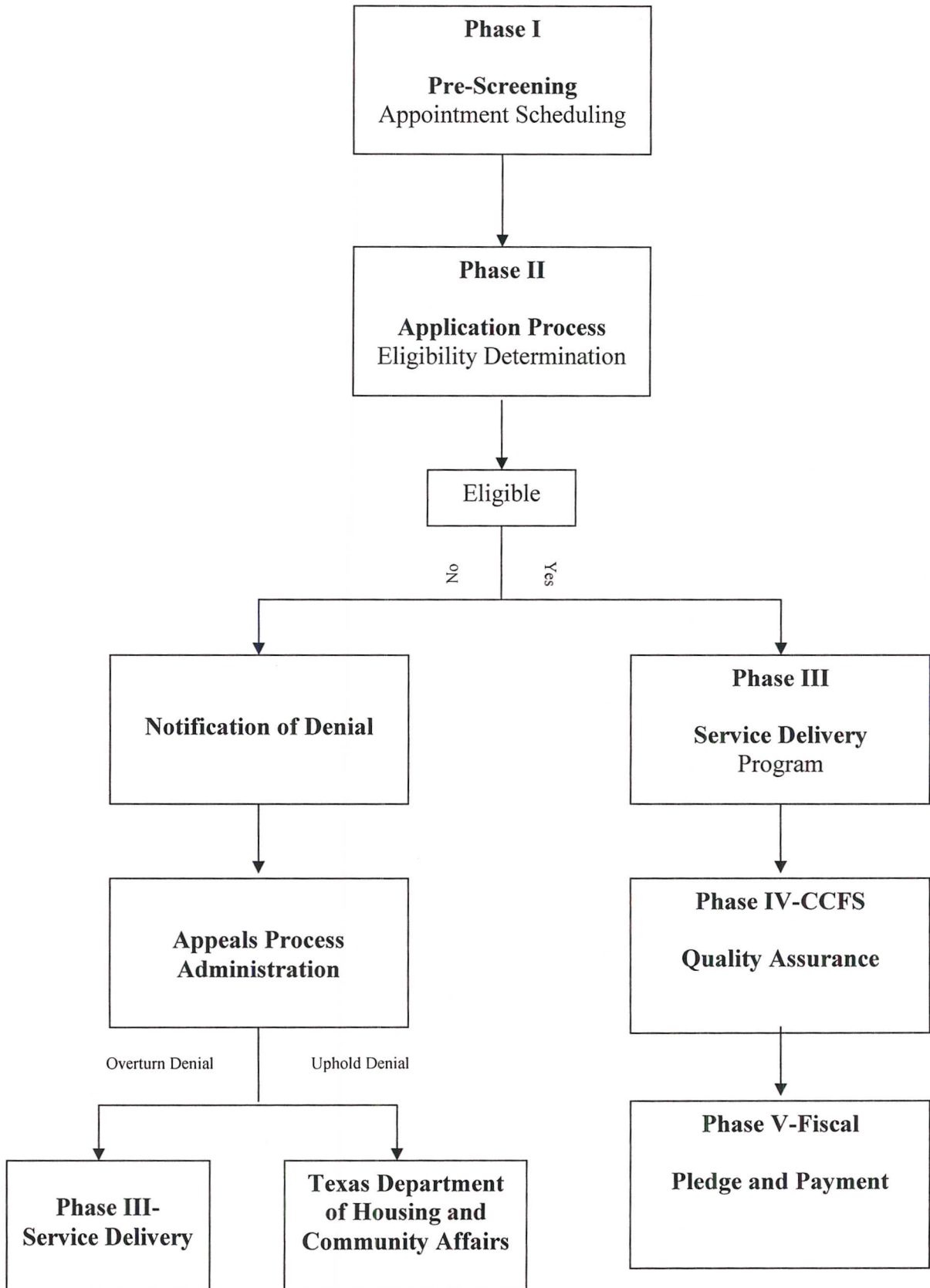
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Service Delivery System



The following procedures have been established in order to maintain compliance with the Texas Administration Code, Low Income Home Energy Program State Plan, Community Service Block Grant Contract, Migrant Seasonal Farm Worker Program Contract and Comprehensive Energy Assistance Contract.

### **Hidalgo County residents may seek utility bill assistance for current utility bills**

#### **Phase I-Pre Screening**

1). A Pre-Screening Application Packet (PSA) is utilized to inform the client of all required documentation, capture basic household data, inform the client of charges that will not be considered and to obtain client consent to contact their respective utility company.

\*Note: A PSA is not a guarantee of assistance.

##### A). Telephone Contact

1). Client is informed of all required documentation needed. This information is provided in an effort to prepare the client for the Pre-Screening process conducted when visiting the Agency.

2). Upon client request, a PSA may be mailed to the client's home.

##### B). Face – To – Face Contact

2). County of Hidalgo Community Service Agency (CHCSA) operates under a Numbering and Appointment System.

##### A). Numbering System

1). As the client arrives, the client is asked to take a number and is informed that they will be called based on the number taken.

a). PSA's are readily available.

i). PSA's may be completed in the lobby while the client waits to be called. .

2). PSAs are reviewed by worker for completeness and required signatures.

a). Required documentation deemed primary (absolute) must be submitted.

i). Emphasis is placed on the current utility bill due date

aa). A utility bill that comes due prior to appointment is considered to be past due.

\*Next available appointment is posted on Bulletin Board and updated frequently. This information is also provided during telephone contact.

ii) Proof of income must be presented for all household members 18 years of age or older.

aa). All household members (related and not related residing in the household) 18+ must provide proof of earned and/or unearned income.

bb). Anyone claiming zero income is required to register with Texas Workforce Commission.

\*Proof of registration must be presented.

b). Copies of primary documentation is made by worker.

## B). Appointment System

\*Appointments are reserved for clients who have not received assistance in the previous 90 days.

- 1). An appointment is given to clients who present a current utility bill that coincides with the next available appointment and presents all income documentation.
  - a). Documentation deemed secondary in nature may be submitted at time of appointment. Such documentation may include social security numbers and/or birth certificates.
- 2). Appointments are scheduled at 30 minute intervals
  - a). Main Office appointments commence at 8:15 am until 3:30 pm.
  - b). Satellite Office appointments commence at 8:15 am until 3:30pm.
- 3). An appointment form is provided to the client.
  - a). Appointment forms include:
    - 1). Date and time of appointment
    - 2). Secondary documentation required at appointment time
    - 3). Signature of worker scheduling appointment
    - 4). Client signature acknowledging appointment provided and secondary documentation required.
- 4). All PSAs accepted and scheduled are maintained under lock and key until day of scheduled appointment.

**DETAILED INSTRUCTIONS ARE PROVIDED TO WORKERS DURING ANNUAL STAFF TRAINING AT THE COMMENCEMENT OF THE PROGRAM YEAR AND THROUGHOUT THE YEAR AS NEW OR UPDATED INFORMATION IS MADE AVAILABLE.**

**STAFF ACKNOWLEDGE RECEIPT AND RESPONSIBILITY OF TRAINING MATERIALS AND INSTRUCTIONS PROVIDED OF EACH PHASE DESCRIBED HEREIN.**

## Phase II-Application Process

- 1). Computerized Application is completed by agency staff.  
Manual process in place in the event of computer and/or technical problems.
- 2). Individual Demographics and Household Characteristics are gathered.
- 3). Income eligibility is determined based on countable income received in the 30 days prior to application. The 30 day income is the basis for determining the household's annual income as required by funding source..

\*Income includes but is not limited to the following:

### Countable:

#### Earned Income:

- Employment
- Self-Employment
- Rental Income
- Interest

#### Unearned Income

- Social Security Benefits
- Pension
- TANF
- Workers Compensation
- Unemployment Insurance

### Non-Countable

Identified as a resource(s) used in addition to earned income to provide for the household's living expenses.

#### Earned Income

- Earned by family member under the age of 18

#### Unearned Income

- Veterans Disability Benefits
- Supplement Security Insurance
- Retired, Survivors, Disability Insurance
- Social Security Disability Insurance
- Child Support
- Pell Grants
- Work Study

Declaration of Income Statement (DIS) may be used when proof of income is not available and based on CHCSA policy. DIS form prescribed by funding source.

\*Current Federal Poverty Income Guidelines are utilized to determine income eligibility.

Household size is taken into account. A household's annualized income can not be greater than 125% of the Federal Poverty Income Guidelines in order to be determined income eligible.

4). Clients who neglect to submit all required income documentation are afforded an additional opportunity to provide this documentation through the Delay/Pending Process.

A). Delay Pending Process

1). Clients are given 5 business days in which to submit the missing documentation.

2). A Delay/Pending Form is provided to client with the following information

a). Appointment date and time to return

b). Documentation needed

c). Final day that documentation may be submitted

d). Client and Worker signature

3). In the event that the client does not return within the allotted time, the case is closed and advisement of such is mailed to the client.

5). Income ineligible households (households with annualized income greater than 125% of the Federal Poverty Income Guidelines) are denied services. The ineligible household is informed in writing of their ineligibility status and provided with information on the necessary steps to take if they choose to appeal the decision.

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## Phase III-Service Delivery

### Income eligible clients

- 1). Workers contact utility companies per client via telephone to ensure that the amount owed reflected on the current utility bill is accurate and that any fees that can not be considered are identified.
- 2). Clients are informed of the amount CHCSA will authorize for payment.
  - A). An Awareness Form is provided to the client detailing the authorized amount and client's portion, if any.
  - B). Lead time required for advising utility company.
  - C). Need for original bill
  - D). Advisement on changes to authorized amount, if any.
  - E). Client signature acknowledging information provided.
- 3). Notice of Payment is generated.

\*It is CHCSA's goal and obligatory assurance to funding source to prevent the clients utility service from being disconnected therefore if client owes more than CHCSA can authorize for payment, client is required to resolve the difference prior to CHCSA authorizing the identified amount.

- A). Client is offered an opportunity to resolve the issue through the Delay/Pending Process.

- 4). Upon completion of the Service Delivery Phase the case is consider complete and forwarded to the Central Client File Systems Department for Quality Assurance Review.

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## **Phase IV-Quality Assurance Review**

- 1). All completed cases under go a quality assurance (QA) review.
  - A) Quality Assurance review is conducted to ensure accuracy, completeness, and compliance to funding rules and regulations.
    - 1). QA includes review of income documentation, individual demographics, household characteristics, and amount authorized.
      - a). Notice of Payments for cases passing quality assurance review are forwarded to the Fiscal Department for pledging.
        - i). Pledging-Fiscal advises utility companies via fax of CHCSA's intent to submit payment on the clients behalf.
      - b). Cases not passing quality assurance review are returned to the worker to address items in question.
        - i). QA is conducted again once items in question are addressed.

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## **Phase V-Pledging and Payment**

The Fiscal Department receives the transmittal per daily services for payment. The pledge is a promisory notification via fax to the vendor in agreement of partnership to accept this notification as a binding fiduciary resolution of behalf of the client.

Payment will follow between the next ten to twenty days.

## Appeals Process

All households deemed ineligible are informed of the decision and are afforded an opportunity to appeal the decision. CHCSA provides a written Notification of Denial to all households that have been denied.

- 1). Notification of Denial
  - A). Reason for denial
  - B). Client signature for acknowledgment of receipt
  - C). Procedures to follow should household wish to appeal
- 2) Hearing Procedures
  - A). Upon written advisement of request to appeal, hearing is scheduled within ten business days of receiving advisement.
    - 1). Committee meets with client
      - a). Committee is comprised of agency Supervisors knowledgeable of program rules, regulations and requirements.
    - 2). Committee determines to sustain appeal or uphold denial
  - B). Client is advised of committee's decision
    - 1). Sustain appeal-verbal communication
    - 2). Uphold denial-written communication
      - a). Client has an opportunity to appeal the committee's decision
        - i). Written communication provides the client information on how to appeal to the funding source.

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