Instructions to Complete the Assurance 16 Spreadsheet

This Excel template has been created for the purpose of providing agencies participating in Assurance 16 a means of tracking the services provided to help encourage and enable households reduce their home energy needs.

1. Input of data

General Principles:

1. It is essential that you do not deviate from the template. Please do not:
   (i) change the order of the column;
  (ii) delete any of the existing columns;
 (iii) change the title of the columns or
 (iv) merge any cells.

2. Please fill in the contact details of your agency
  (i) fill in all of the requested information

3. Please be mindful to avoid adding extra "invisible" characters (such as blank spaces or tabs after the text) to the cells that may cause problems when importing the data.

4. Please review tab 1.2 Column Definitions for explanations of the column headings on the Tracking Spreadsheet (tab 1.3).

How to fill in the cells in the Excel template:

1.1 Agency Info
Enter the information for your agency in the appropriate cells making sure that all of the requested infomation is filled in.

1.3 Tracking Sheet
Household ID
•Enter the clients household ID that was generated in THO.

Application Date
•Enter the application date. This is the date the signed application form is received in the LIHEAP office whether they are mailed, faxed, e-mailed, hand-delivered, or received as an online application

County of Residence
•Select the county from the drop-down list available in the spreadsheet

Client Type
•Select from the drop-down list whether er the client is receiving Crisis Assistance or Regular Assistance

Household Income
•Enter the LIHEAP recipient's households income

Household Size
•Enter the LIHEAP recipient's household size

Activity Date
•Select the date the Assurance 16 service/activity was provided

Type of Service Received
•Select from the drop-down list the type of Assurance 16 service that was provided to the LIHEAP recipient. If the service provided is not listed in the drop-down please type the service that was provided to the LIHEAP recipient.

Client Participaton
•Select from the drop-down list whether the LIHEAP recipient actually participated in the service that was provided/offered to them

Cost of Service
•Enter the cost of the service that was provided to the LIHEAP recipient

Data Usage Information
•Enter the baseline month. This is the starting month which will serve as the beginning of the baseline period.

•Enter the baseline usage amount which is the average energy costs from the 12 months billing history (or however long the LIHEAP recipient has lived at their address). This information is gathered during the intake process and is located in THO.

•Enter the final month which is the last month of energy consumption data collected for the Assurance 16 activity.

•Enter the final uasge amount. This is the end point of the baseline period at which the average energy costs are collected.

Autocalculated Fields
This spreadsheet contains two autocalcuated fields: Percent of Change and $ Amount of Change. These fields automatically calculate the percent of change and dollar amount of change in energy consumption from the baseline starting point to the final end period of the Assurance 16 activity.

Assurance 16

Tennessee Housing Development Agency (THDA) reserves up to 2% of a subgrantee's allocation for Assurance 16 services to encourgae innovative activities that aim to proactively reduce household energy need and enhance household security, . To track these services, subgrantees should use the tracking log on the tab labeled 1.3 Tracking Sheet.

Agency Information

LIHEAP Agency Name:	
LIHEAP Program Year:	
Agency Contact Name:	
Agency Contact Email:	
Agency Contact Phone #:	

Assurance 16 Client Information - Column Heading Definitions

Household ID: Unique ID number that is assigned automatically by THO

Application Date: The date the signed application form is received in the LIHEAP office whether they are mailed, faxed, e-mailed, hand-delivered, or received as an online application

County of Residence: County the household was living in at the time the service was provided

Client Type: Indicates whether the client has received Regular or Crisis Assistance

Household Income: Income refers to the total annual cash receipts before taxes from all sources, with the exceptions as noted in the State

Household Size: Any individual or group of individuals who are living together as one economic unit for whom residential energy is

Activity Date: The date that the Assurance 16 service was provided to the LIHEAP household

Type of Service Received: The type of Assurance 16 service that the LIHEAP household received

Client Participation: Indicates whether the LIHEAP household actually participated in the Assurance 16 service that was offered or provided to

Cost of Service: Cost of the Assurance 16 service provided to the household

Assurance 16 Household Usage Data - Column Heading Definitions

Baseline (Starting Point): The baseline serves as a starting point in which data is collected at the beginning of the Assurance 16 activity or before intervention has occurred.

Baseline Month: The starting month which will serve as the beginning of the baseline period

Baseline Usage Amount: The average energy costs for the past 12 months (or however long the client has lived at their address). This information is collected during the intake process.

Final (End Point): Serves as the final point/stage at which data is collected at the end period of the Assurance 16 activity or intervention.

Final Month: The last month of energy consumption data collected for the Assurance 16 activity.

Final Usage Amount: The end point of the baseline period at which the average energy costs are collected.

Increase/Decrease From Baseline to Final Usage: Calculates the percent of change and dollar amount of change in energy consumption from the baseline starting point to the final end period of the Assurance 16 activity.

Percent of Change: This is an autocalcuated field. It is a comparison between the baseline energy usage amount and the final energy usage amount. A negative percent of change indicates a decrease from the original value (baseline) to the second value (final/endpoint). A positive percent of change indicates an increase from the original value (baseline) to the second value (final/endpoint).

$ Amount of Change: This is an autocalculated field. It is a comparison between the baseline energy usage amount and the final energy usage amount. A negative dollar amount indicates a decrease from the orginal value (baseline) to the second value (final/endpoit). A positive dollar amount indicates an increase from the original value (baseline) to the second value (final/endpoint).

Household ID	Application Date	County of Residence	Client Type	Household Income	Household Size	Activity Date	Type of Service Received	Client Participation (Y/N)	Cost of Service	Baseline (Starting point)		Final (End Point)		Increase/Decrease (-) From Baseline to Final Usage	
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