MPSC
MICHIGAN PUBLIC SERVICE COMMISSION

Michigan Energy Assistance Program

Policy and Procedure Manual v2.0

Effective October 1, 2026, for Fiscal Year 2027

LARA
LICENSING AND REGULATORY AFFAIRS

Table of Contents

Section 1.0 MEAP Program Overview 1

1.1 History of the Michigan Energy Assistance Program 1
1.2 MEAP Goals and Objectives 3
1.2.1 Legislative Goals 3
1.2.2 Program Objectives 4
1.3 Funding Sources 5
1.4 Key Energy Assistance Definitions and Dates 6
1.4.1 Key Definitions in the Michigan Energy Assistance Act 6
1.4.2 Definitions for Self-Sufficiency Services 7
1.4.3 Key Program Dates 11
1.5 Geographic Distribution of Funding 15
List of Appendices Related to Section 1 17

Section 2.0 Program Administration Standards 18

2.1 Non-Discriminatory Policy 18
2.1.1 Non-Discrimination in Providing Benefits 18
2.1.2 Non-Discrimination in Employment 18
2.1.3 Religious Preference 18
2.2 Accessibility Guidelines 18
2.2.1 Web Content Accessibility Guidelines 19
2.2.2 Meaningful Language Access to State Services Act 19
2.3 Data Security Policy 20
2.3.1 Data Breach / Loss of Data 20
2.3.2 Data Security Internal Audit 21
2.3.3 Data Security by the State of Michigan, MPSC 21
2.3.4 Termination Due to Data Security Deficiencies 22
2.3.5 Employee Background Checks 22
List of Appendices Related to Section 2 23

Section 3.0 MEAP Eligible Benefits and Services 24

3.1 State Emergency Relief (SER) 24
3.1.1 SER Co-Payment 25
3.2 Covered Services 25
3.3 Non-Covered Services 27

3.4 MEAP Payment Caps....29
3.4.1 Exceptions....32
3.4.2 Crisis and Energy Security Assistance Interaction....34
3.4.3 Bill Transfers....34
3.5 Home Energy Suppliers....35
3.5.1 Revisions or Corrections....35
3.5.2 Vendor Payments Tax Reporting....36
3.6 Energy Assistance Underpayments, Overpayments, and Refunds....36
3.6.1 Underpayments....36
3.6.2 Overpayments....36
3.6.3 Refunds....36
3.6.4 Reconciling the Validation Tool....37
List of Appendices Related to Section 3....38
Section 4.0 The Application Process....39
4.1 Applicant Income Eligibility....39
4.1.1 Eligibility Considerations....39
4.1.2 Categorical Eligibility Sources....40
4.1.3 Validating Income Eligibility for Those Not Categorically Eligible....41
4.2 Eligibility for Crisis Assistance....46
4.3 Eligibility for Home Energy Security Assistance....47
4.3.1 APP Terms and Conditions....49
4.3.2 Home Energy Security Allowance (HESA)....52
4.4 Determination Notice....55
4.4.1 Missing Documents....55
4.4.2 Approval Process....56
4.4.3 Denial Process....56
4.4.4 Reasons for Ineligibility, Denial, and Additional Options....56
4.5 Standard of Promptness....58
4.5.1 Standard of Promptness – Crisis Assistance....58
4.5.2 Standard of Promptness – Energy Security Services....58
4.6 Prioritization of Vulnerable Households for Services....58
4.6.1 Methods of Prioritizing Vulnerable Households in the MEAP....59
4.7 Re-establishing Eligibility for Additional Assistance....60
4.8 The Applicant File....60

4.8.1 The Application 61
4.8.2 Eligibility Verification 61
4.8.3 Documentation of Financial Assistance 62
4.8.4 Documentation of Self-Sufficiency Services 63
4.8.5 Comprehensive Documentation of Services 63
List of Appendices Related to Section 4 64
Section 5.0 Guidelines on the Provision of Self-Sufficiency Services 65
5.1 Promoting Self-Sufficiency and Energy Security 65
5.2 Requirements of MEAP Providers 66
5.2.1 Michigan Energy Assistance Act (MEAA) Required Services 67
5.2.2 LIHEAP Assurance 16 Services 67
5.2.3 Self-Sufficiency Services Provided through MEAP 67
5.3 Foundational Services 68
5.3.1 Energy Security Planning 69
5.3.2 Needs Assessment/Referral Service 69
5.3.3 Vendor Advocacy 70
5.4 Education and Skill-building Services 70
5.4.1 Budgeting Services 71
5.4.2 Energy Conservation Services 72
5.4.3 Short Term Case Management 73
5.4.4 Longer Term Case Management 73
5.5 Reporting of Self-Sufficiency Services 73
5.5.1 LIHEAP Assurance 16 or MEAP Energy Assistance Program 74
5.6 Examples of Self-Sufficiency Services 74
5.6.1 Examples of Vendor Advocacy - Type 1 74
5.6.2 Examples of Financial Discussion 75
5.6.3 Examples of Energy Savings Discussion 75
5.6.4 Examples of Conservation Resources Provision 75
5.6.5 Examples of Weatherization Referral 75
5.6.6 Examples of Case Management Services 76
List of Appendices Related to Section 5 78
Section 6.0 Energy Security through Affordable Payment Plans 79
6.1 Home Energy Supplier APP Participation Parameters 79

6.2 Establishing an Affordable Payment Plan 79
6.3 Home Energy Supplier and Grantee APP Coordination 80
6.3.1 APP Outreach 81
6.3.2 APP Projections 81
6.3.3 APP Payments 81
6.3.4 APP Reporting 81
6.4 MPSC Contract Guidance for APP Relationships 81
6.4.1 APP Program model 82
6.4.2 APP Communication plan 84
6.4.3 Eligibility Verification and Enrollment in APPs 84
6.4.4 APP Payment application 85
6.4.5 Disenrolling APP customers 86
6.4.6 Program year funds must be applied within the program year 86
6.4.7 APP Contract term 87
6.4.8 Energy Waste Reduction services for APP customers 87
6.4.9 APP Reporting 87
6.5 APP Participant Communications from the Home Energy Supplier 89
6.5.1 APP Enrollment 90
6.5.2 APP Budget Review / Reconciliation 90
6.5.3 Revalidation Notice for APP Customers 90
6.5.4 Past Due Notice for APP Customers 90
6.5.5 Removal for Non-Pay 91
6.5.6 APP Plan Conclusion (enrolling on a budget plan): 91
6.6 The Home Energy Supplier APP Benefit Matrix 91
List of Appendices Related to Section 6 92
Section 7.0 Grant Expenditures 93
7.1 Grantee Registration 93
7.2 Grant Payment Schedule 93
7.3 Personnel 93
7.3.1 Disallowed Personnel Expenditures 94
7.3.2 Fringe Benefits 94
7.3.3 Opting Out of Insurance Coverage 95
7.4 Supplies, Materials, and Equipment 95
7.5 Contractual Services 95

7.6 Travel Expenditures 96
7.7 EAP Other Expenses 96
7.8 EAP Direct Assistance Expenses 97
7.9 Indirect Costs 97
7.10 Budget Revisions 97
7.10.1 Updates Within Budget Categories 98
7.10.2 Updates Between Budget Categories 98
7.10.3 Grantee Employee Turnover and Leave of Absence 99
List of Appendices Related to Section 7 101
Section 8.0 Program Monitoring and Reporting 102
8.1 Reporting and Metrics 102
8.1.1 Service Output Metrics 102
8.1.2 Households Served Data and Documentation List 103
8.1.3 Household File Sampling 103
8.2 Monitoring 104
8.2.1 Financial Status Reports 104
8.2.2 Project Status Reports 104
8.2.3 Site Visits 105
8.2.4 Internal Monitoring 105
8.3 Program Year 2027 Reporting Dates 106
List of Appendices Related to Section 8 109
Section 9.0 Program Performance Metrics 110
9.1 Grantee Task Completion 110
9.1.1 Promote Collaboration and Coordination of MEAP 110
9.1.2 Provide Assistance to Low-Income Households 110
9.1.3 Promote Access to MEAP In the Geographic Regions Served 111
9.2 Legal Compliance 112
9.3 Self-Sufficiency Services in MEAP Performance Metrics 113
9.4 Performance Deficiencies 114
9.4.1 Identification of Deficiencies 114
9.4.2 Corrective Action Plan (CAP) 114
9.4.3 Corrective Action Requirements 114
9.5 Legislative Goal Achievement 115

List of Appendices Related to Section 9 117
Section 10.0 Coordination of Services 118
10.1 Promote Education and Outreach 118
10.2 Coordinate with Michigan 2-1-1 118
10.3 Become a Navigator/Referral Partner 118
10.4 Coordinate with Home Energy Suppliers 119
10.5 Coordinate with the Organization's Other Program Services 120
10.6 Coordinate with Other Agencies / Grantees 120
10.7 Notification of Service Status 120
10.8 Coordination Through Participation 120
10.9 Regional Coordination 120
List of Appendices Related to Section 10 121
Appendices Section 122
Appendix 1-A Glossary of Terms 123
Appendix 7-D Examples of Allowable A-16 Services 129

Section 1.0 MEAP Program Overview

The Michigan Public Service Commission (MPSC) within the Department of Licensing and Regulatory Affairs (LARA) and the Michigan Department of Health and Human Services (MDHHS) are responsible for the administration of the Michigan Energy Assistance Program (MEAP). The Interagency Agreement/Memorandum of Understanding between MDHHS and LARA establishes the responsibilities of each party.

MPSC contracts with local non-profits, local governments, and public and private entities to administer the program by using a Request for Proposal (RFP) process. The RFP provides interested parties with sufficient information to enable them to prepare and submit a proposal including service projections, a budget, budget narrative, and timeline. Selected Applicants ("Grantees") are then awarded funding to assist eligible low-income households.

Residential utility customers may qualify for MEAP through various categorically eligible sources, income verification, or by being determined eligible for State Emergency Relief (SER). Households experiencing an energy crisis may apply for the SER program, either directly with MDHHS or with assistance from a Grantee/MI Bridges Navigator. For applicants at or below 150% of the Federal Poverty Level (FPL), MDHHS may determine eligibility for Low-Income Home Energy Assistance (LIHEAP) crisis component which funds SER, however, this determination is not guaranteed. Households who qualify for an SER energy payment will be deemed categorically eligible for MEAP payment assistance, including enrollment in an affordable payment plan (APP) where applicable. Applicants who have not been determined eligible by MDHHS will have their eligibility determined either through another categorical income source or through income verification by the MEAP Grantee.

Energy-based SER applicants will be eligible to receive self-sufficiency services funded by the Assurance-16 (A-16) component of the Federal Low-Income Home Energy Assistance Program (LIHEAP), including case management through MEAP Grantees. Applicants who are income-qualified or categorically eligible for MEAP may also receive self-sufficiency services funded through the Low-Income Energy Assistance Fund (LIEAF) and enroll in an APP.

Program information can be found here: michigan.gov/energyassistance on the MPSC website.

1.1 History of the Michigan Energy Assistance Program

The Michigan Energy Assistance Act (MEAA), Public Act 615 of 2012 (MCL 400.1231, et seq.) Michigan established the Michigan Energy Assistance Program (MEAP). The Act provides that the MEAP program may be funded by the federal LIHEAP Fund, funds received from the LIEAF, or any other money appropriated to the program. PA 615 included a September 30, 2016, sunset for the MEAP program. The sunset was extended by Public Act 147 of 2016 (extended until Sept. 30, 2019) and Public Act 87 of 2019 (extended until Sept. 30, 2023). Public Act 105 of 2023 eliminated the MEAP sunset.

Public Acts 170 and 198 of 2024 made several updates to the Michigan Energy Assistance Act. These updates:

- Expand eligibility to low-income households with incomes of not more than 60% State Median Income (SMI) (up from 150% FPL).
- Add or update several definitions including definitions for Eligible low-income households, Categorical eligibility, Commission, State median income, Vulnerable populations, and Crisis.
- Remove households whose electric utilities do not collect the LIEAF funding factor from eligibility for MEAP.
- Require the consideration of opportunities for incorporating categorical eligibility when establishing guidelines for verifying eligibility.
- Require that MEAP prioritize vulnerable populations (as defined in the Act) and, as appropriate for the household, include services that will enable participants to become or move toward becoming self-sufficient, which could include referral to weatherization or energy waste reduction programs and services.
- Require efforts to coordinate across programs to promote self-sufficiency and reduce energy insecurity.
- Require notification to participants of eligibility for other services for which they qualify including, but not limited to, energy waste reduction products and services offered by an energy provider or a home weatherization assistance program.
- Require the development of guidelines regarding self-sufficiency programs by Oct. 1, 2025, and the incorporation of those guidelines into grant performance metrics for the 2026/2027 program year.
- Provide flexibility regarding setting administrative cost caps.
- Modify the deadline of the annual MEAP report.

The MEAP Program is primarily funded through the LIEAF which was established in Public Act 95 of 2013 (MCL 460.9t). In addition to establishing the LIEAF, Public Act 95 authorizes the Commission to set the annual LIEAF funding factor and provides parameters related to the use of the LIEAF.

Recognizing the need to expand available assistance dollars consistent with the 2024 updates to The Michigan Energy Assistance Act, the legislature also amended the LIEAF statute. Public Acts 168 and 169 of 2024:

- Require that LIEAF is administered in such a way as to ensure promotion of statewide access to the MEAP program, with funds collected through the LIEAF being, to the extent possible, returned to the geographic area from which they are collected.

- To the extent possible, eligible low-income customers in a geographic area are receiving funds proportional to what customers in that geographic area are being assessed.
- For energy providers and entities that administer assistance programs, education and outreach on availability of the assistance programs and funding is required.
- Increase the maximum amount of the LIEAF funding factor that the Commission can establish. Public Act 95 of 2013 set the maximum funding factor at $1 per month calculated to collect no more than $50 million. The 2024 amendments allow the Commission to increase this monthly funding factor by $0.25 annually until it reaches a cap of $2/month. Beginning in 2029, the Commission may adjust the $2/month cap for inflation on an annual basis.
- Remove the $50 million cap on the fund and provide an up to 10% rollover of dollars in the fund from one program year to the next. The acts require a reduction in the funding factor if the balance at the end of a program year exceeds 10% of what was collected in that year. [1]
- Amend the utility opt-out provision. Utilities under 45,000 residential electric customers may continue to opt out of collecting the LIEAF. If they opt out, they are required to provide an assistance program for their customers, consistent with the requirements of the MEAP, to assist with both electric and home heating needs. Requirements regarding publication of information regarding the opt out program and reporting requirements are also included.

1.2 MEAP Goals and Objectives

As with any program, it is important to keep an eye on the program's goals and objectives to stay true to the intent of the program and to increase success in the attainment of goals.

1.2.1 Legislative Goals

Program goals for the MEAP can be found in its authorizing legislation, the MEAA and in MCL 400.1231 to 400.1235. Goals for the MEAP[2] are as follows:

- To provide energy assistance to eligible low-income households.

[1] .The 10% rollover of funds relates to setting the overall MEAP funding factor. Grantees are not allowed to rollover funds to the next program year, any unspent funds at the end of a program year must be returned. The act requires a reduction in the funding factor and thus lowers the fund for the next fiscal year if the total of all unspent MEAP funds exceeds 10% of what was collected in that year.

[2] MCL - Act 615 of 2012 - Michigan Legislature

"An act to provide energy assistance for low-income households; and to prescribe certain powers and duties of certain state departments and agencies,"

"Energy assistance" means a program to reduce energy insecurity by assisting eligible low-income households in meeting their home energy costs for their primary residence."

- To prioritize vulnerable populations for energy assistance.

  "Energy assistance must prioritize vulnerable populations…"

- To include services to assist low-income households in becoming or moving toward becoming self-sufficient and reducing energy insecurity.

  "…and, as appropriate for the household, include services that will enable participants to become or move toward becoming self-sufficient."

Additional goals for the LIEAF which funds the MEAP are addressed in PA 169 of 2024.[3] Subject to the limitations imposed in this section, the MDHHS shall expend money from the fund, on appropriation, as provided in the MEAA, 2012 PA 615, MCL 400.1231 to 400.1235.

- MDHHS, in consultation with the Commission, shall ensure that all money collected for the fund from a geographic area is returned, to the extent possible, to that geographic area.
- Ensure the fund is administered to promote statewide access to the Michigan Energy Assistance Program established in section 3 of the MEAA, 2012 PA 615, MCL 400.1233, and ensuring that funds collected from a specific geographic area are, to the extent possible, returned to eligible low-income customers in that specific geographic area. AND
- Ensure the fund is administered to promote collaboration between MDHHS the Commission, energy providers, and entities that administer assistance programs to ensure that eligible low-income customers in a geographic area are receiving funds proportional to what customers in that geographic area are being assessed. AND
- Ensure energy providers and entities that administer assistance programs promote education and outreach on the availability of the assistance programs and funding.

1.2.2 Program Objectives

- Determine eligibility and provide energy assistance to eligible low-income households.
- Prioritize vulnerable populations for energy assistance.

[3] 2024-PA-0169.pdf

- Assist low-income households as appropriate in becoming or moving toward becoming self-sufficient and reducing energy insecurity by including the following services:
    - Energy security planning.
    - Common needs assessment, aligning customer need with appropriate services and referrals for each household.
    - Vendor advocacy: Type 1 – Vendor Advocacy – non-APP., Type 2 – New APP enrollment Type 3 – APP reverification[4],
    - Budgeting services: Type 1 - Financial discussion, Type 2 - Budget review, Type 3 - Budget counseling (optional).
    - Energy conservation services: Type 1- Energy savings discussion, Type 2 - Conservation resources provision (optional), Type 3 - Energy education course (optional), Type 4 - Weatherization referral.
    - Short term case management.
    - Longer term case management (optional).
- Promote education and outreach on availability of assistance programs and funding.
- Promote the coordination of energy assistance funding streams.
- Provide a convenient, customer-friendly system for distribution of energy assistance.
- Encourage innovation through pilot projects that target underserved households or special populations. Examples include facilitation of weatherization services for higher-than-average energy usage, energy security for customers of non-metered fuels, outreach to vulnerable and/or low/fixed income populations.

1.3 Funding Sources

The MEAP is funded by the Low-Income Energy Assistance Fund (LIEAF), comprised of surcharge revenues collected from participating electric utility providers' customers and, when available, by the federal government through the Assurance 16 (A16) funds through the LIHEAP block grant, CFDA 93.568.

Public Act 95 permits the MPSC to annually approve a low-income energy assistance fund funding factor to fund the LIEAF. Formerly capped at a funding factor of $1.00 per meter per month and not collecting more than $50,000,000, Public Act 169 of the Michigan Public Acts of 2024 now grants the MPSC authority to increase the monthly per meter funding factor to $1.25 the first year in effect, and an additional

[4] Income reverification was not required after enrollment on an APP in prior program years; therefore, roll-over customers will not need to be verified prior to graduation. In FY27, plan lengths and the revalidation period will vary by income status. APP reverification expected to begin in FY29.

$0.25 annually thereafter up to a maximum of $2.00 so long as more than 10% of the fund balance does not remain unspent in the fund in the previous year. For fiscal year 2027, the MPSC adopted a monthly funding factor of $1.50 per retail electric billing meter for all Michigan electric utilities that have opted to participate in the funding of LIEAF, effective the September 2026 billing month.[5]

Beginning in 2029, and each year thereafter per Public Act 169 of Michigan Public Acts of 2024, the commission shall adjust the cap on the low-income energy assistance funding factor by the percentage increase in the United States Consumer Price Index for the immediately preceding calendar year.

A16 funds carry the federal LIHEAP reporting requirements as set forth in Section 8.0, Monitoring and Reporting Program Performance.

1.4 Key Energy Assistance Definitions and Dates

A full glossary of key terms and definitions can be found in Appendix 1-A.

1.4.1 Key Definitions in the Michigan Energy Assistance Act

1) "Crisis" * means one of the following:
   a. An individual or recipient has received a past due notice on an energy bill for the individual's or recipient's household.
   b. A residential fuel tank is estimated to contain not more than 30% of its heating fuel capacity.
   c. A stated need for deliverable fuel or a non-traditional fuel source in which there is no meter or regular energy bill provided.
   d. A notice that the balance in a prepayment account is below a minimum amount.

   *Although crisis is defined by PA 170 of 2024, the bill does not mandate a crisis season nor require an applicant to be in crisis to be eligible for MEAP.

2) "Categorical eligibility" means policies that make a household eligible for energy assistance based on the household's involvement in other low-income assistance programs that utilize similar eligibility criteria. Households which receive SER would be determined categorically eligible to receive MEAP and A-16 Services.

3) "Eligible low-income household" for MEAP purposes means a household with an income of 60% of the state median income or below and whose electric utility does not opt-out of collecting the low-income energy assistance funding factor under section 9t of 1939 PA 3, MCL 460.9t. For SER purposes, the term means a household with an income of 150% of the Federal Poverty Guidelines, or less.

4) "Energy assistance" means a program to reduce energy insecurity by assisting eligible low-income households in meeting their home energy costs for their

[5] Filing: U-17377-0284

primary residence through payment or partial payment of bills for 1 or more of the following: electricity, natural gas, propane, heating oil, any other deliverable fuel used to provide heat

"Federal Poverty Guidelines" means the poverty guidelines published annually in the federal register by the United States Department of Health and Human Services under its authority to revise the poverty line under section 673(2) of subtitle B of title VI of the Omnibus Budget Reconciliation Act of 1981, 42 USC 9902.See the LIHEAP Income Eligibility for States and Territories | The LIHEAP Clearinghouse[6] for tables that will be in effect for LIHEAP eligibility determinations in the grant year October 1st through September 30th..

5) "State median income" means the state median income promulgated by the secretary of the United States Department of Health and Human Services in accordance with procedures established under section 2002 of the social security act, 42 USC 1397a, and adjusted, in accordance with regulations prescribed by the secretary, to take into account the number of individuals in the household. See the LIHEAP Income Eligibility for States and Territories | The LIHEAP Clearinghouse for tables that will be in effect for MEAP eligibility determinations in the grant year October 1st, through September 30th.

6) "Vulnerable populations" means eligible low-income households that have at least 1 member that meets the following criteria:
   a. Is a child under 5 years of age.
   b. Is an individual with a disability.
   c. Is an individual who is 60 years of age or older.
   d. Is an individual who has experienced homelessness in the preceding 12 months and who needs energy assistance to secure housing.

1.4.2 Definitions for Self-Sufficiency Services

As required by the MEAA, energy assistance through MEAP must, as appropriate for the household, include services that will enable participants to become or move toward becoming self-sufficient. Services that assist participants in becoming self-sufficient include, but are not limited to, providing assistance to help participants in paying their energy bills on time, assisting participants in budgeting for and contributing to their ability to provide for energy expenses, and referral to weatherization or energy waste reduction programs and services. Through the MEAP grants, MPSC and MDHHS shall attempt to coordinate efforts with the efforts of other state departments or agencies to assist low-income households in becoming or moving toward becoming self-sufficient and reducing energy insecurity.

[6] liheapch.acf.gov/delivery/income_eligibility.html

"Self Sufficiency Services" are outlined in greater detail in the *Guidelines for the Provision of Self Sufficiency Services* Section of this Manual and are defined here:

1) "Assurance 16" (A-16) refers to the federal LIHEAP statute which requires states to adhere to 16 different requirements or assurances. A-16 allows states to spend up to 5% of their LIHEAP Block Grant funds on "services that encourage and enable households to reduce their home energy needs and thereby the need for energy assistance." A16 also requires states to report to the U.S. Department of Health and Human Services on the impact of such activities. MEAP recipients who are categorically eligible as a result of being approved for SER, will be considered eligible for A-16 services and only services to SER approved applicants may be charged against the federal funding in the MEAP grant.

2) "Energy Assistance Program (EAP)" refers to grant funds directly related to the delivery of energy assistance program services. EAP costs should include Program Costs, and Self-sufficiency Costs and Direct Energy Assistance Payments. EAP personnel costs will be reflected on time sheets for customers who have not been determined eligible for SER.

3) "Self Sufficiency Services" are outlined in the *Guidelines for the Provision of Self Sufficiency Services* Section 5.0 of this manual. In 2021, Self-sufficiency was defined in a subcommittee of the MEAP Workgroup as: *"A household's basic needs are being met while minimizing reliance on public assistance."* This definition is aligned with the LIHEAP A-16 which gives the option for states to provide: *"...services that encourage and enable households to reduce their home energy needs and thereby the need for energy assistance."*[4] Self-sufficiency services that may be provided under EAP or A-16 as outlined here:

   - Energy Security Planning
   - Needs Assessment/Referral*
   - Vendor Advocacy*
     - Type 1: Vendor advocacy not related to Affordable Payment Plans
     - Type 2: New Affordable Payment Plan enrollment
     - Type 3: Affordable Payment Plan reverification ✚
   - Budgeting services*
     - Type 1: Financial discussion
     - Type 2: Budget review
     - Type 3: Budget counseling
   - Energy conservation services*
     - Type 1: Energy savings discussion
     - Type 2: Conservation resources provision ✚
     - Type 3: Energy education course ✚
     - Type 4: Weatherization referral

- Short-term case management*
- Longer term case management* ✚

*These services are eligible for federal LIHEAP funding if the applicant has received SER in the current program year.
✚These services are optional for the grantee organization.

4) "Energy Security Planning" means creating a plan together with a MEAP applicant toward a goal of improving self- sufficiency or enhancing energy security. Energy Security Planning does not include working with the applicant to complete an application for energy assistance nor a determination of the amount of energy assistance benefits. The Energy Security Plan form is available to document an appropriate energy security plan for the applicant household. The plan should be based on an assessment of the applicant's needs. An assessment utilizing a common needs assessment/referral tool that aligns customer need with the services provided may be counted as an additional MEAP Self-Sufficiency service.

5) "Needs Assessment/Referral" means utilizing a common set of questions provided in the MEAP Manual in a relational format (be it in a virtual meeting, in-person, or by phone) to assess the needs of applicants and tailor services and/or referrals based on needs identified in the assessment.

6) "Vendor Advocacy" means going beyond identifying account numbers, determining the balance owed, and making a payment commitment on an account. Vendor advocacy includes helping the applicant to communicate effectively with the vendor and facilitating details for maintaining service. This can include support needed for HESA bill payment assistance and always applies when helping the applicant to enroll in a home energy supplier affordable payment plan. Vendor advocacy does not include working with an applicant to complete an application, and in many cases, it will not be necessary.[7] There are three distinct types of vendor advocacy identified for the MEAP. These include:
   - Type 1: "Vendor Advocacy – non-APP" means helping the applicant to communicate effectively with the vendor and facilitating details for maintaining service. This applies for both crisis assistance and HESA bill payment assistance to reduce energy insecurity.
   - Type 2: "New APP enrollment" means enrolling a customer in an APP for the first time with their electric of gas utility.

[7] See examples in Section 5.6.1

- Type 3: “APP reverification” means re-establishing income eligibility to retain APP enrollment.[8]

7) “Affordable Payment Plan” (APP) means a program that provides a household with a more affordable and predictable energy payment for an established period of time and includes a component for arrearage forgiveness when necessary.

8) “Budgeting Services” means providing financial coaching, financial literacy education, and/or financial management training based on the needs assessment/referral service. There are three distinct types of budgeting services identified for the MEAP:
   - Type 1: “Financial discussion” means a discussion in person, by phone or in a virtual meeting of income and expense strategies with the applicant and documenting the strategies in a case note.
   - Type 2: “Budget review” means assisting an applicant with completing a budget form including their monthly income and expenses or reviewing the applicants independently completed budget with them and coaching them on how they may increase income or reduce expenses. This service is evidenced by a copy of the budget form in the case file that has been signed by the applicant.
   - Type 3: “Budget counseling” means spending at least a total of 90 minutes meeting with an applicant individually or in a group class setting throughout one or more meetings with the specific purpose of providing coaching and advice on household budget management.

9) “Energy Conservation Services” (often referred to as “Energy waste reduction services”) means assisting an applicant, based on the needs assessment/referral service, to develop a better understanding of their energy bill, identify strategies to mitigate their usage thereby managing their energy expenses, and connecting households with weatherization and/or pre-weatherization services. There are four distinct types of energy education services:
   - Type 1: “Energy savings discussion” means a discussion in person, by phone, in a virtual meeting, or through approved digital learning formats, i.e., interactive videos with comprehension checks and follow-up discussion to ensure understanding.

[8] In order to reduce energy insecurity, APP participants may remain on APPs, without an automatic end date, as long as they are eligible. Reverification processes will be utilized to verify continued eligibility.

- Type 2: “Conservation resources” means providing the applicant with material energy conservation resources such as weather-stripping, low-energy use lights bulbs, outlet covers, etc.
- Type 3: “Energy education course” means spending at least a total of 90 minutes meeting with an applicant individually or in a group class setting throughout one or more meetings with the specific purpose of providing coaching and advice on energy conservation.
- Type 4: “Weatherization referral” means a referral to a weatherization, pre-weatherization, or energy waste reduction services home energy supplier program contact where it is known that the connection between the program and the applicant occurred.

10) “Short Term Case Management” means providing information and sharing materials about services available to MEAP applicants, developing an understanding of an applicant’s needs and offering guidance during the MEAP relationship. All MEAP providers are expected to offer the opportunity for Short Term Case Management as part of MEAP self-sufficiency services.

11) “Longer Term Case Management” means providing Short Term Case Management and additionally working with participants over the course of two or more meetings to accomplish any of the following services:
    - Budget counseling
    - Energy education
    - Meeting for APP monitoring and support
    - Support with goals toward becoming self-sufficient

1.4.3 Key Program Dates

October 1, 2025 – At the beginning of the FY 2026 program year, the following MEAP changes related to Public Act 170, Public Act 198, and Public Act 169 were in effect.

- Elimination of Crisis Season and transition to a focus on Energy Security.
- Crisis definition for deliverable fuels modified to read, “A residential fuel tank is estimated to contain not more than 30% of its heating fuel capacity” instead of the previous 25% capacity.
- Provision of Self-Sufficiency Guidelines.
- Prioritization of Vulnerable Populations.
- Requirement to provide referral to weatherization or energy waste reduction programs and services.
- Incorporation of Categorical Eligibility.
- Expansion of eligibility to 60% State Median Income.

- Elimination of LIEAF cap and funding factor raised to $1.25.
- To the extent possible, funds received by eligible low-income customers in a geographic area should be proportional to the LIEAF funds collected in that geographic area.
- Customers of opt-out utilities are no longer eligible to receive MEAP. Opt-out utilities must establish and fund an energy assistance program comparable to MEAP, in function and eligibility, for their residential customers' electric and home heating needs. Opt-out utilities may also now shut off customers from November 1 to March 31.[9]

November 1 to March 31 – The Winter Protection Plan protects low-income customers and senior citizens from shut off per MPSC rules and state law as set forth in MCL 460.9r(3)(d).

October 1, 2026 – Anticipated Program Start Date of the FY 2027 program year and the date when Self-sufficiency guidelines must be incorporated into the performance metrics, per Public Act 170 of 2024. On this date, the following policy changes also go into effect:

- Refined geographic distribution of LIEAF funding through MEAP – Addressed in the distribution of grant funds through the Request for Proposal (RFP) process.
- Indirect costs cannot be applied to the federal LIHEAP funds and funds will be reported separately in Financial Status Reports (FSRs).
- Accessibility Guidelines requirements – Section 2.2
- Clarification of crisis assistance parameters – Section 3.1
- Changes to maximum assistance levels (caps) – Section 3.4
- Documentation of need for energy security services based on energy burden - Section 4.3
- New APP benefit matrix foundations - Section 4.3.1
- APP re-validation cadences – Section 4.3.1
- A Home Energy Security Allowance (HESA) will be utilized to support home energy security needs outside of Affordable Payment Plans – Section 4.3.2
- Clarifications on standards of promptness – Section 4.5
- Updated guidance on prioritizing vulnerable households – Section 4.6
- LIEAF funding factor rose to $1.50

List of Opt-out Utilities for Program Year 2027

- Bayfield Electric Cooperative, Inc.
- City of Harbor Springs

[9] Opt-out utilities are not legally required to submit information on their programs to the MPSC. MEAP grantees will need to learn about the programs of opt-out providers through their local relationships. However, any direct referral information provided by opt-out utilities to the MPSC will be provided to MEAP grantees.

- City of Wakefield
- Coldwater Board of Public Utilities
- Grand Haven Board of Light & Power
- Holland Board of Public Works
- Lowell Light & Power
- Marquette Board of Light & Power
- Traverse City Light & Power
- Wyandotte Department of Municipal Service
- Zeeland Board of Public Works

September 30, 2027 – FY 2027 Grant year end

Chart 1: FY 2027 Reporting Dates

Report Due Date	Report Type	FSR #	Period Covered
November 24, 2026	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	1	October 1 – October 31, 2026
November 30, 2026	Financial Status Report w/ Support	1	October 1 – October 31, 2026
December 29, 2026	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	2	November 1 – November 30, 2026
January 4, 2027	Financial Status Report w/ Support	2	November 1 – November 30, 2026
January 26, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	3	December 1 – December 31, 2026
February 1, 2027	Financial Status Report w/ Support	3	December 1 – December 31, 2026
February 23, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	4	January 1 – January 31, 2027
March 1, 2027	Financial Status Report w/ Support	4	January 1 – January 31, 2027
March 25, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	5	February 1 – February 28, 2027
March 31, 2027	Financial Status Report w/ Support	5	February 1 – February 28, 2027
April 26, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	6	March 1 – March 31, 2027
April 30, 2027	Financial Status Report w/ Support	6	March 1 – March 31, 2027
April 30, 2027	Interim Project Status Report		October 1, 2026 – March 31, 2027
May 25, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	7	April 1 – April 30, 2027
May 31, 2027	Financial Status Report w/ Support	7	April 1 – April 30, 2027
June 24, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	8	May 1 – May 31, 2027
June 30, 2027	Financial Status Report w/ Support	8	May 1 – May 31, 2027

July 27, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	9	June 1 – June 30, 2027
August 2, 2027	Financial Status Report w/ Support	9	June 1 – June 30, 2027
August 25, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	10	July 1 – July 31, 2027
August 31, 2027	Financial Status Report w/ Support	10	July 1 – July 31, 2027
September 10, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	11	August 1 – August 31, 2027
September 15, 2027	Financial Status Report w/ Support	11	August 1 – August 31, 2027
October 5, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	12	September 1 – September 30, 2027
October 8, 2027	Financial Status Report w/ Support	12	September 1 – September 30, 2027
October 8, 2027	Final Project Report	October 1, 2026 – September 30, 2027	

1.5 Geographic Distribution of Funding

The December 2024 MEAP legislative revision package placed a renewed emphasis on how the funds are distributed across the state. Specifically, as amended, MCL 460.9t(5)(a) requires that the fund be administered to promote "Statewide access to the Michigan energy assistance program . . . ensuring that funds collected from a specific geographic area are, to the extent possible, returned to eligible low-income customers in that specific geographic area."

Grantees are asked to focus their education and outreach efforts in the assigned regions and ensure that MEAP service information provided to 2-1-1 or other organizations regarding their service areas focuses on the assigned regions. For agencies that have historically provided service in a geographic region but have not been assigned that region for 2027:

- Allow flexibility to address presenting need from region to region.
- Continue servicing existing APP customers regardless of the region in which the customer resides.
- Make clear on websites and in outreach efforts the service areas that are assigned.

- Consider opportunities for outreach and education in an area where a grantee notices that applications are not being received from an assigned region. Commission Staff stand ready to provide assistance in this as we are able.

During the 2027 program year, grantees are not expected to:

- Serve only customers from the assigned region or perfectly restrict funds to customers from assigned regions.
- Refuse service to a customer because they are a resident of a region not assigned to the Grantee.

List of Appendices Related to Section 1

Appendix 1-A Glossary of Terms

Section 2.0 Program Administration Standards

The MEAP is to be administered in compliance with Federal and State law. Of particular note are policies involving non-discrimination, policies to protect data security and privacy, and laws to make information accessible to those seeking information about assistance.

2.1 Non-Discriminatory Policy

As a recipient of federal and state funding, the MEAP provides all services and referrals relative to energy assistance to eligible households regardless of race, sex, color, national origin, ancestry, religious creed, disability or age.

2.1.1 Non-Discrimination in Providing Benefits

MEAP does not exclude, deny benefits to, or otherwise discriminate against any person on the grounds of race, color, or national origin, or on the basis of disability or age in admission to, participation in, or receipt of the services and benefits under any of its programs and activities, whether carried out by MEAP directly or through a Grantee, vendor, or any other entity with which MEAP arranges to carry out its programs and activities.

2.1.2 Non-Discrimination in Employment

Under the Elliott-Larsen Civil Rights Act, 1976 PA 453, MCL 37.2101, et seq., and the Persons with Disabilities Civil Rights Act, 1976 PA 220, MCL 37.1101, et seq., and Executive Directive 2019-09 each Grantee and its subgrantees agree not to discriminate against an employee or applicant for employment with respect to hire, tenure, terms, conditions, or privileges of employment, or a matter directly or indirectly related to employment, because of race, color, religion, national origin, age, sex (as defined in Executive Directive 2019-09), height, weight, marital status, partisan considerations, any mental or physical disability, or genetic information that is unrelated to the person's ability to perform the duties of a particular job or position. Breach of this covenant is a material breach of this Contract.

2.1.3 Religious Preference

Also in keeping with the Elliott-Larson Civil Rights Act, the MEAP Grantee shall not require applicants to divulge their religious preference in order to receive energy assistance utilizing MEAP benefits.

2.2 Accessibility Guidelines

The Americans with Disabilities Act (ADA)[10] provides protection to individuals with disabilities similar to those provided to individuals on the basis of race, color, sex, national origin, age and religion. It guarantees equal opportunity for individuals with disabilities in employment, state and local government services, public accommodations, and telecommunications.

[10] The Americans with Disabilities Act | ADA.gov

The MEAP Grantee shall not ask the cause of an applicant's disability or any other discriminatory question when determining eligibility for MEAP benefits.

2.2.1 Web Content Accessibility Guidelines

Title II of the ADA requires state and local government entities, including state government grant recipients, to make their services, programs, and activities offered through websites and mobile applications accessible to people with disabilities. This includes compliance with the Web Content Accessibility Guidelines (WCAG) 2.1, Level AA, which sets the technical standard for accessibility.[11]

Section 35.200 (b) Requirements. (1) states that, "Beginning April 24, 2026, a public entity, other than a special district government, with a total population of 50,000 or more shall ensure that the web content and mobile apps that the public entity provides or makes available, directly or through contractual, licensing, or other arrangements, comply with Level A and Level AA success criteria and conformance requirements specified in WCAG 2.1, unless the public entity can demonstrate that compliance with this section would result in a fundamental alteration in the nature of a service, program, or activity or in undue financial and administrative burdens."

On April 20, 2026, the deadline for compliance was extended by removing the text "April 24, 2026" and adding in its place the text "April 26, 2027".[12]

Standards for WCAG compliance may be found via the SOM Digital Standards website and an Accessibility Quick Start Guide is available as Appendix 2-A.

2.2.2 Meaningful Language Access to State Services Act

Per contract guidelines, grantees must comply with the Meaningful Language Access to State Services Act (MLASSA), MCL 37.21 et seq.,[13] in providing any services on behalf of the State or in creating any "vital documents" for the State. At a minimum, any "vital documents" (as defined in MLASSA) Contractor creates for the State must be available in the following languages: Spanish, Arabic, Bengali, and Chinese (including Mandarin, Cantonese, and Taiwanese). Vital documents must also be readily translatable by Contractor into additional languages upon request.

Vital Documents

Vital documents will be provided to grantees in the required languages. These include the following:

- Appendix 4-A MEAP Application
- Appendix 4-D Determination Notice
- Appendix 4-E Missing Documents Letter
- Appendix 4-F Appeal Form

[11] eCFR :: 28 CFR 35.200 -- Requirements for web and mobile accessibility.
[12] Federal Register: Extension of Compliance Dates for Nondiscrimination on the Basis of Disability; Accessibility of Web Information and Services of State and Local Government Entities
[13] MCL - Section 37.21 - Michigan Legislature

- Appendix 5-A Energy Security Plan form
- Appendix 5-B Needs Assessment Tool

2.3 Data Security Policy

The Grantee is responsible for establishing and maintaining a data privacy and information security program, including physical, technical, administrative, and organizational safeguards, that is designed to:

1) Ensure the security and confidentiality of the State Data

2) Protect against any anticipated threats or hazards to the security or integrity of the State Data; (c) protect against unauthorized disclosure, access to, or use of the State Data

3) Ensure the proper disposal of State Data

4) Ensure that all employees, agents, and subcontractors of Grantee, if any, comply with all of the foregoing. In no case will the safeguards of Grantee's data privacy and information security program be less stringent than the safeguards used by the State, and Grantee must at all times comply with all applicable State IT policies and standards, which are available to Grantee upon request.

2.3.1 Data Breach / Loss of Data

In the event of any act, error or omission, negligence, misconduct, or breach that compromises or is suspected to compromise the security, confidentiality, or integrity of State Data or the physical, technical, administrative, or organizational safeguards put in place by Grantee that relate to the protection of the security, confidentiality, or integrity of State Data, Grantee must:

1) Notify the State (MPSC) as soon as practical but no later than 24 hours of becoming aware of such an occurrence.

2) Cooperate with the State (MPSC and MDHHS) in investigating the occurrence, including making available all relevant records, logs, files, data reporting, and other materials required to comply with applicable law or as otherwise required by the State.

3) In the case of Personally Identifiable Information (PII)[14] or Protected Health Information (PHI)[15], at the State's sole election,

[14] Personally Identifiable Information (PII) - information that can be used on its own or with other information to identify, contact, or locate a single person, or to identify an individual in context

[15] Protected Health Information (PHI) - any information about health status, provision of healthcare or payment for healthcare.

a. Notify the affected individuals as soon as practicable but no later than is required to comply with applicable law, or, in the absence of any legally required notification period, within five (5) calendar days of the occurrence.

b. Notify non-affected individuals and households of the data breach.

c. Reimburse the State for any costs in notifying the affected individuals.

4) In the case of PII, provide third-party credit and identity monitoring services to each of the affected individuals who comprise the PII for the period required to comply with applicable law, or, in the absence of any legally required monitoring services, for no less than 24 months following the date of notification to such individuals.

5) Perform or take any other actions required to comply with applicable law as a result of the occurrence.

6) Without limiting Grantee's obligations of indemnification as further described in the Grant Agreement, indemnify, defend, and hold harmless the State for any and all claims, including reasonable attorneys' fees, costs, and expenses incidental thereto, which may be suffered by, accrued against, charged to, or recoverable from the State in connection with the occurrence.

7) Be responsible for recreating lost State Data in the manner and on the schedule set by the State without charge to the State.

8) Provide the State with a detailed plan within 10 calendar days of the occurrence describing the measures Grantee will undertake to prevent a future occurrence.

a. Notification to affected individuals, as described above, must comply with applicable law, be written in plain language, and contain, at a minimum: name and contact information of Grantee's representative; a description of the nature of the loss; a list of the types of data involved; the known or approximate date of the loss; how such loss may affect the affected individual; what steps Grantee has taken to protect the affected individual; what steps the affected individual can take to protect himself or herself; contact information for major credit card reporting agencies; and, information regarding the credit and identity monitoring services to be provided by Grantee.

2.3.2 Data Security Internal Audit

No less than annually, Grantee must conduct a comprehensive independent third-party audit of its data privacy and information security program and provide such audit findings to the State.

2.3.3 Data Security by the State of Michigan, MPSC

Without limiting any other audit rights of the State, the State has the right to review Grantee's data privacy and information security program prior to the commencement of grant activities and from time to time during the term of the

Grant Agreement. During the grant term and without notice, the State at its own expense, is entitled to perform, or to have performed, an on-site audit of Grantees data privacy and information security program. In lieu of an on-site audit, upon request by the State, Grantee agrees to complete, within 45 calendar days of receipt, an audit questionnaire provided by the State regarding Grantee's data privacy and information security program.

2.3.4 Termination Due to Data Security Deficiencies

The Grantee must implement any required safeguards as identified by the State or by any audit of Grantee's data privacy and information security program.

The State reserves the right, at its sole election, to immediately terminate the Grant Agreement or a Statement of Work without limitation and without liability if the State determines that Grantee fails or has failed to meet its obligations.

2.3.5 Employee Background Checks

The Grantee must conduct background checks on all employees and subcontractors and its employees prior to their assignment.

The Michigan State Police provide the Internet Criminal History Access Tool, or ICHAT, which allows you to instantaneously access the criminal history records of individuals who have been convicted of a crime in Michigan, as well as for individuals who have pending criminal cases. ICHAT is an easy way to access this information, and the fee is waived for government agencies screening employees and volunteers.

To access ICHAT type michigan.gov/ichat in your browser. If you have not used ICHAT before you will need to register yourself and your agency. For each entry, you will need the subject's full name (including aliases and/or maiden names), sex, race, and date of birth. The response will provide all personal descriptors on file and a list of convictions and/or pending cases involving the subject.

Please note that this search will only include convictions recorded in Michigan and reported to the Michigan State Police. Suppressed records and warrant information are not available through ICHAT. Also not included are federal records, tribal records, and criminal history from other states. A search for a record that may be in another state requires that you correspond with that state directly.

To obtain a government/charitable Agency Code (necessary to perform the checks at no charge) you will need to fax the following information to the ICHAT Coordinator at 517-241- 0866:

- Agency name, address, and phone number
- Federal ID number
- Name and e-mail address of contact person
- Number of additional users
- Estimated number of annual searches
- 501(c)3 letter from the IRS documenting your non-profit status (if not a government agency). Please allow two to three weeks for a response.

List of Appendices Related to Section 2

Appendix 2-A Accessibility Quick Start Guide

Section 3.0 MEAP Eligible Benefits and Services

The MEAP provides an array of benefits that are outlined in this section including covered and non-covered benefits, payment limits or caps, eligible home energy suppliers or vendors, and handling payment adjustments and reconciliations.

3.1 State Emergency Relief (SER)

Households that are at 150% FPL or lower can and may seek SER either before or after receiving MEAP assistance. Eligible households can receive a SER payment if they meet the definition of crisis for SER. MEAP households may be determined categorically eligible for MEAP assistance if they are SER eligible. Grantees should take note that those who are income eligible and in energy crisis should be directed to SER for crisis resolution before processing MEAP assistance except in In limited situations where an SER application is not needed. Examples are as follows:

- When a household has received SER assistance during the current program year, they should not apply for second assistance for the same commodity and may be served instead by MEAP.
- When a household's income is MEAP eligible but exceeds the SER eligibility threshold, an SER application is discouraged.
- When the situation is acute, i.e., critically low on fuel or already shut off, and the MEAP grantee can provide a more expedient resolution, SER determination is not required.
- An SER eligibility determination is not required for MEAP Home Energy Security assistance through Affordable Payment Plans (APPs) or the Home Energy Security Allowance (HESA).

Categorical eligibility for SER qualifies a household for MEAP services for the entire fiscal year, and if a customer has a combined electric and natural gas account and is approved for only one commodity/service, the household will be considered MEAP eligible for both service types.

The maximum SER payment is based on fuel type; the minimum benefit amount is the amount needed to resolve the energy crisis. SER payment amounts exceeding the maximum require an exception and approval by the LIHEAP program office.

Maximum SER benefits for FY 2027 are set as follows:

- Natural gas, non-heat electric, wood, wood pellets, and other non-traditional heating fuels are $600.
- Deliverable fuel, fuel oil, coal and all-electric households are $900.

If a MEAP Grantee is assisting with an SER co-pay, the MEAP Grantee must notify MDHHS of a payment guarantee. Once MDHHS has verified the MEAP assistance for the co-pay, the SER payment will be authorized. Verifications should be sent to the MDHHS Central FAX # 517- 346-9888. The MEAP grantee can utilize fax confirmation

as receipt with the expectation that documentation will be uploaded into the applicant's electronic case file (ECF). If working with a DHHS Specialist who prefers the verifications to be sent directly to them, the verification must also be sent to the Central FAX number.

SER policy will only allow the issuance of one payment for heat and one payment for non-heat electricity, up to the fiscal year SER cap. Subsequent requests for SER for the same commodity would be denied. At the time of denial, by contacting 211 or via referral in MI bridges, the household would be referred to a MEAP grantee.

3.1.1 SER Co-Payment

If an applicant has a co-payment that results from an amount that is over the SER cap, MEAP funds can be used to assist with that amount. The household must complete a MEAP application in order to receive a direct assistance payment through MEAP.

Enrollment in an affordable payment plan is sufficient "proof" of co-payment for households with a shortfall, over-cap, and/or asset co-payment requirement. The proof of Affordable Payment Plan enrollment for SER copay form must be used to notify the MDHHS of the applicant's enrollment in an APP in lieu of making a co-payment.

See Appendix 3-A for the APP enrollment for SER co- payment form and Appendix 3-B for additional details and examples.

3.2 Covered Services

1) Assistance Payments for an eligible household's electric or primary heat service for their current residence may be covered. The household's account does not have to be in past due status, in threat of shut off, or already shut off for a payment to be authorized to the home energy supplier.

2) Payment may be made on a prepayment account for a household's natural gas or electric services may be covered when the balance remaining in the account does not exceed the equivalent of the average of one (1) month's billing cycle.

3) MEAP funds can be used to cover late fees associated with non-regulated utilities.[16] Any fees on an invoice for deliverable fuel must be clearly identified. Administrative fees (fees for processing paperwork for MEAP recipients) are not allowed and should be reported to MPSC.

4) MEAP funds may cover payments for all types of deliverable fuels.
   a. Grantees must not authorize payment before a service is provided, delivered, or before the household has made the required copayment.

[16] See the MPSC website for regulated and unregulated electric and natural gas utilities.

b. For MDHHS SER copayments, MEAP Grantees must inform the energy provider that they are committing to the SER co-pay and that delivery cannot be made until MDHHS has confirmed receipt of the SER co-payment commitment. *MDHHS will contact the energy provider to authorize delivery.*
c. For fuel oil and propane, the invoice must contain the date service was provided, cost of service and the provider must also confirm that the residential fuel tank did not contain more than 30% of its heating fuel capacity at the time of delivery. Exception may be made for customers participating in an approved pilot program.
d. For wood and other combustible heating types, the invoice must contain the date of the service provided, cost of service per unit and any delivery fees. Payments must not be released until the service has been provided and an invoice signed by the customer has been received. This process will avoid situations where payments are made without services being provided.
e. Deposits, special trip charges, pilot relights, pressure checks, reconnect fees, and related charges such as propane storage tank installation, delivery, or rental can be paid if they are required by an unregulated home energy supplier to prevent an emergency. Note: Payment to some regulated suppliers for reconnect fees may be authorized; please inquire with the Grant Administrator if this need is identified.
f. Deposits as a condition of providing new service, service to a previous customer or continuing service to a current customer, cannot be required by a regulated home energy supplier if the Department of Health and Human Services or MEAP is responsible for making payments to the supplier for the applicant/customer.

5) Common meter/service situations occur when one meter or heat/electric unit services more than one residential unit or residence. If the energy provider can verify the group's actual usage and the provider will accept the household's portion and maintain services, payment may be made in full for the household's portion of the bill.

6) Budgeted MEAP Self-sufficiency or A16 program costs can cover expenses directly related to the delivery of energy assistance self-sufficiency activities offered by MEAP. See Section 5.0 for Guidelines on the Provision of Self-Sufficiency Services.

7) Payments for applicants who are under suspicion of having committed fraud of assistance funding or unauthorized or illegal use of utilities, but have not been convicted, can be covered. These applicants cannot be denied MEAP assistance, however, home energy suppliers may flag the account for fraud/theft based on a

tip or complaint before a formal investigation takes place. See Appendix 3-F, Suspected Theft/Fraud Flow Chart.

a. Grantees who suspect fraud should alert the Office of Inspector General, either by completing the Welfare Fraud Online Complaint Submission or calling the Hotline: 855-MI-FRAUD (855-643-7283). Grantees should also inform the MPSC Grant Administrator once the form has been filed.

8) MEAP can cover past due or shut-off amounts for account with confirmed unauthorized or illegal usage in situations where the provider can identify the unauthorized or illegal usage separately.
   a. The household must meet all other eligibility requirements.
   b. The applicant must provide proof that they have paid the charges associated with unauthorized or illegal usage before the MEAP payment can be issued.

3.3 Non-Covered Services

Grantees must not authorize energy services to pay for the following as these will not be covered, and an example of non-covered services is provided as Appendix 3-C.

1) Confirmed unauthorized or illegal use.

2) Regulated utility/energy provider[17] late fees. Per 460.125(2), "[a] utility shall not assess a late payment charge against a residential customer whose payments are made by the department of human services or who is participating in a shut off protection program".[18] Example late fees are provided as Appendix 3-G.

3) Utility charges for opting out of AMI/Smart Meter programs

4) Optional services such as appliance repair or appliance protection programs.

5) Bankrupt accounts.
   a. In some cases, bankruptcy may be listed on the customer's account in ORA or CE Pass for historical purposes. Please confirm with the energy provider whether or not the bankruptcy status is current.
   b. Exception for a crisis application: If the home energy supplier knows the dollar amount that is NOT subject to bankruptcy, and that dollar amount that is not subject to bankruptcy would resolve the emergency for the next 30 days a crisis payment could be made if all other eligibility requirements have been met, and if the applicant would not exceed the cap.

[17] See the MPSC website for regulated and unregulated electric and natural gas utilities.
[18] See the MPSC website for Consumer Standards and Billing Practices for Electric and Natural Gas Service

c. For APPs and energy security payments, customers with a current or former bankruptcy can participate in the APP or receive energy security payment assistance. However, the account that is included in the bankruptcy cannot be enrolled or receive payment. Any balance that was part of the bankruptcy is kept separate and does not qualify for energy security assistance.

6) Cooking gas

7) Service used in businesses or non-residential buildings or facilities such as rental units, garages, stores, or non-residential farm uses.
   a. When a bill represents combined residential and nonresidential or business usage, pay only the residential portion if the home energy supplier can provide an approximate breakdown showing the residential use portion and the group applying for energy services pays the nonresidential costs.
   b. If an applicant who works in their own home, the bill is in the applicant's name, and the service address and the applicant's residential address are the same, the bill is considered residential and payment may be authorized.
   c. If the bill is in the name of the applicant's business, it is considered a commercial bill and payment cannot be authorized.

8) Payments to residential landlords, residential management companies, billing service agencies, or collection agencies are not eligible to receive emergency service or MEAP funds, as they are not the actual service provider. Examples of third-party billing companies who are not eligible providers include:
   a. Universal Utilities
   b. D & B Billing Services
   c. Electrical Inspection Company
   d. Infinity Billing Enterprises
      i. Exception: Accounts that have gone to collections can be paid if the collections department is one within the original home energy supplier, for example DTE's collections department. If the account has been turned over to an outside collection agency, then the bill is not able to be paid with MEAP funds.
      ii. Exception: Utility bills that are in the landlord's name only if the payment is made directly to the home energy supplier, and if there is documentation stating that the applicant is responsible for the utility bill.

9) Energy services when the usage is in violation of the federal law.
      i. Example: An applicant has requested assistance for an electric shut off which includes costs associated to manufacturing "medical" marijuana. The applicant is not eligible for MEAP since federal law, 21 U.S.C. 841(a) prohibits the manufacturing of marijuana.

10) Secondary household fuel types: Payment may be approved for a secondary household fuel type ONLY if the primary heating source is in disrepair/non-working, OR if secondary heating source is considered with the heating commodity cap. For example, in an especially cold winter an eligible customer has initially applied for MEAP crisis (past due notice) for natural gas (primary heat source). In February the household opts to supplement their heat with wood pellets (secondary heating source). The customer finds they still need assistance and returns for additional crisis assistance (stated need for deliverable fuel) for wood pellets. The request, now for a secondary heating source, is approved as it is still within the heating commodity cap (natural gas, non-heat electric, wood, wood-pellets, and other non-traditional heating fuels) for crisis assistance for this household.

11) Utility cut and cap fees/meter relocation fees.

3.4 MEAP Payment Caps

When determining eligibility for MEAP assistance, you must deduct any prior MEAP assistance benefits issued through the program during the fiscal year from the household's fiscal year caps for crisis assistance and/or home energy security assistance. Crisis assistance and energy security assistance are treated separately.

- Energy assistance payments issued through SER do not count toward the household's MEAP cap.
- Crisis caps remain consistent regardless of the amount of energy security assistance a customer has received.
- Current charges may be handled through a HESA once the past due amount is addressed via a crisis payment or through an APP with a payment of up to $600 toward arrears within the first 30 days.

MEAP Energy Security Benefits should be determined based on considerations of income, commodity, bill costs, and energy burden. Because income and energy burden is a determining factor, not every household will receive the maximum energy security benefit. Households with a balance exceeding the fiscal year commodity cap, as calculated by the FY 27 MEAP HES Benefit Calculator, should not be automatically denied or turned away but should be evaluated for an exception based on the exception policy in Section 3.4.1.

Energy providers may be asked to refund any benefits that exceed that cap amount if they do not follow the exceptions policy.

MEAP benefits for FY 2027 are as follows:

1) Maximum SER Co-Pay and Crisis Benefit

- Natural gas, non-heat electric, wood, wood pellets, and or non-traditional heating fuels: $600
- Deliverable fuel, fuel oil, coal or all-electric households: $900
- If the customer has applied for an SER co-payment from MEAP, the client is responsible for proving the co-payment has been taken care of. The MEAP Grantee will provide a commitment to MDHHS and will provide the MEAP payment once the MDHHS payment has been released. If an applicant requests crisis assistance without an SER per one of the situations outlined in Section 3.1, the MEAP grantee should discern whether there is an SER application in process. If there is no SER application, to expedite assistance, payment can be released without a customer contribution.
- A crisis payment must resolve the crisis for 30 days.
    i. If a customer is in crisis, the commodity cap will not resolve the crisis, and the customer is not energy burdened, an exception may be requested.
    ii. If a customer requires an SER co-pay, the commodity cap will not resolve the crisis, and the customer is not energy burdened, an exception may be requested.
    iii. If the applicant's crisis exceeds the cap amount, an APP enrollment or a HESA assistance can help resolve the crisis.

2) Maximum Energy Security Benefit
   - Assistance levels for APP and HESA are determined with consideration of customer energy burden. The energy security benefit amount will be set by the Excel-based MEAP Benefit Calculator tool known as the "FY 27 MEAP HES Benefit Calculator."[19] To determine the benefit amount a household will receive, the MEAP Benefit Calculator utilizes pre-set inputs (e.g. utility data, energy burden targets), in addition to information collected from the MEAP eligible household (e.g. income, name of utility company, commodity, average monthly bill for APPs). The MEAP Benefit Calculator will calculate the energy burden for single or dual commodities, depending on the information input into the calculator. While grantees are encouraged to facilitate energy security holistically, they should assist eligible households with the needs they are presenting.
   - The cap, or maximum annual benefit, is set according to energy burden and income tiers. Households within the same income tier and with similar usage will have the same cap, whereas households within the same income tier with different usage will experience different caps (i.e., high consumption vs. low consumption). Households in different income tiers will display different degrees of energy burden and thus have different caps.
   - Non-heat electricity: 4% target energy burden

[19] Reach out to the MEAP Grant Administrator for access to the MEAP Benefit Calculator tool.

- Natural gas, deliverable fuel such as propane and fuel oil, and coal, wood, wood pellets, and other non-traditional heating fuels: 2% target energy burden
- Combined gas and electric account, all-electric households: 6% target energy burden
    i. Combination customers are eligible for assistance to reduce their energy insecurity based on a 6% energy burden goal. However, households may receive an energy security benefit for commodities for which they are deemed to be energy burdened beyond 2% for gas or 4% for electric and may receive assistance with one commodity and not the other depending on income, usage, and commodity costs. A customer is not required to have a total energy burden exceeding 6% of household income to receive assistance with one commodity.
- In rare cases, an applicant may have a change in circumstances such as reduced income or changes in household membership impacting energy usage, or relocation to a new service address where the commodity changes. In these circumstances, a HESA would be recalculated, and an applicant may request to have their APP recalculated. These applicant requests may be considered once per program year per household.

3) Transitioning to energy burden-based APPs:

- A customer who disenrolls for a program year 2026 APP in the 2027 program year for reason of default will not be eligible to enroll in an APP or HESA for that commodity until the 2028 program year. The customer may, however, receive crisis assistance.
- A customer who disenrolls for a program year 2026 APP in the 2027 program year for reason of program completion or relocation to a new service address will be eligible to enroll in an APP or HESA for that commodity. If relocating and enrolling in a HESA for the commodity which they were previously enrolled in an APP, the MEAP APP energy security monthly credits that were applied during the grant year are to be deducted from the HESA amount.

4) Assisting with a Home Energy Security Allowance:

- For HESA, the "FY 27 MEAP HES Benefit Calculator.xls" tool will calculate a benefit based on the applicant's income and Michigan average usage by commodity. Grantees will be required to provide estimated usage data in the 2027 program year for HESA participants to determine whether they are energy burdened, however, benefits will be calculated based on commodity average pricing and usage. For metered fuels including electricity and natural gas, billed information may be used to estimate the monthly average. For deliverable fuels, an applicant may attest to the number of fills/deliveries to determine the monthly average. When an applicant returns for assistance with a HESA payment, the grantee will need to confirm factors on the application such as service address, commodity, household composition, and

income. If there have been no changes, the HESA will remain the same. The HESA calculation would be calculated at enrollment or initial calculation of the HESA. Each time a customer draws off that balance, the balance should be subtracted to calculate the remaining balance. The "FY 27 MEAP HES Benefit Calculator.xls" is a tool to support that process, however, the calculator is not essential in determining the balance. If a grantee has another way to keep track of the HESA benefit and what's been subtracted from it, the tool is not required as a tracking tool for the HESA. The benefit calculator is meant to support that process. If a grantee has an alternate method of calculating and tracking the remaining HESA benefit, an alternate method may be utilized.

- An applicant would remain eligible for the original HESA allowance calculation unless they indicate on a subsequent application form that they have had a change in income, household membership, or address of service. If there is a change that impacts the HESA calculation, previous HESA assistance provided during the program year would be subtracted from the new calculation.
- The HESA payment amounts are not set aside or reserved for the customer; therefore, a budget conversation may assist the applicant in planning the best strategy for applying for additional HESA assistance.

3.4.1 Exceptions

Exceptions may be made up to a household cap to resolve crisis, and exceptions may be made for the number of HESA applications as determined by an assessment of the applicant's situation or need for a household with extenuating circumstances. All exceptions should be documented and must follow the exceptions procedure below.

1) Crisis assistance caps: Exceptions to the fiscal year caps for crisis may be authorized by the Grantee up to combined total household assistance including arrears reduction for crisis resolution that do not exceed $2,500. Exceptions for greater than this amount require authorization by the MPSC MEAP Grant Administrator. This exception is distinct from the HESA and APPs.

   If applicant is in crisis and is also energy burdened with an arrears balance that exceeds one or both of the commodity caps, and the applicant declines energy security assistance, the Grantee should provide crisis assistance up to commodity caps and offer the APP or HESA options. The grantee should not provide or seek an exception when energy security programs are an option unless there are compelling extenuating circumstances.

2) Home Energy Security Allowance applications: Exceptions to the number of HESA applications, but not to the dollar amount, may be authorized by the

grantee for up to a total of 6 applications. To apply policy consistently, it will be important to track and limit the number of HESA instances of assistance per household.

3) Energy Security Assistance Amounts: To maintain the integrity of the energy burden framework, exceptions will not be made to the APP or HESA assistance amounts. APPs are now being designed using an energy burden framework to facilitate greater affordability of energy costs for MEAP eligible households. For those previously enrolled in the 2025 or 2026 program years, a one-time APP subsidy payment, i.e., a direct payment assistance with getting caught up on an APP is allowed. However, any payments beyond this for customers on an APP such as an APP fallen-off payment, i.e., a direct payment assistance for a household who has fallen off an APP during the current program year by missing at least two payments within 12 months, would be considered an exception and should be shared with the MEAP Grant Administrator for pre-approval.

4) Exceptions procedure: Grantees must utilize the following procedure when making exceptions to the household cap or to the number of applications:

   a. Begin by requesting the home energy supplier to waive any late fees.
   b. Require the household's participation in appropriate self-sufficiency/energy security service/activities.
   c. Document in the applicant's file the extenuating circumstances causing the crisis and reason for making the exception including all information in the exception request spreadsheet. For a copy of the exception request spreadsheet, contact the MEAP Grant Administrator.
   d. Review the case and exception request with a MEAP manager from Grantee organization.
   e. Have a MEAP manager from Grantee organization document the approval of the exception request in the applicant's file.

Consideration should be given to payment history, annual usage, and engagement in self- sufficiency/A16 services among other factors (e.g., balance transfers, hardship). A household must engage in appropriate self-sufficiency/A16 activities based on an assessment of the circumstances to have an exception considered.

If there are extenuating circumstances, assistance payments that will cause the household to exceed the exceptions cap should be forwarded to the MPSC MEAP Grant Administrator to be considered for an Administrative Exception, using the exception request spreadsheet. (Appendix 3-D)

3.4.2 Crisis and Energy Security Assistance Interaction

MEAP provides benefits to "reduce energy insecurity…"[20] This is accomplished through APPs, the HESA, and through assistance with energy crises. Energy security benefits and crisis benefits may be required or applied in various combinations. Examples are as follows:

- If an applicant IS NOT in crisis and IS NOT energy burdened, the applicant does not demonstrate need and should be denied MEAP bill payment assistance. If an applicant is denied due to their current circumstances, they may re-apply later if their circumstances change.
- If an applicant IS NOT in crisis but IS energy burdened, for customers of an APP utility, enroll in APP, and for customers of a non-APP utility, enroll in HESA. A customer may be offered both an APP for their APP utility provider and a HESA for a non-APP utility provider. For example, a customer may receive a HESA for their municipal electric account and an APP for their natural gas account if their gas provider is an APP provider (Consumers Energy, DTE Energy, or SEMCO).
- If an applicant IS in crisis and IS NOT energy burdened, the MEAP grantee is to address the crisis up to commodity caps and seek an exception if there are extenuating circumstances.
- If an applicant IS in crisis and IS energy burdened, customers of an APP utility may be enrolled in APP and have up to $600 arrears addressed by the MEAP grantee within 30 days of enrollment. In this case, they would not also be provided crisis assistance. For customer of a non-APP utility the procedure is to address crisis up to the amount to resolve the crisis within the available commodity caps outlined in Section 3.4 and then enroll in a HESA to reduce energy insecurity. The "FY 27 MEAP HES Benefit Calculator" accounts for the differences in these two programs.
- If applicant IS in crisis and IS energy burdened with a balance that is over the crisis commodity cap and the customer declines energy security assistance, the MEAP grantee is expected to provide crisis assistance up to commodity caps and offer the APP or HESA a second time. An exception to the crisis commodity caps should not be requested unless there are compelling extenuating circumstances.

3.4.3 Bill Transfers

Home energy suppliers and their customers each have rights and responsibilities. At times, high utility arrearages are the result of a previous unpaid bill being transferred to a customer's utility bill.

A home energy supplier may transfer an unpaid balance for gas or electric service from a previous address when a customer moves and opens a new account. A home energy supplier may also transfer all or a portion of an unpaid balance if a person with the delinquent account currently resides with a customer opening a new

[20] MCL - Section 400.1232 - Michigan Legislature

account and they have lived in the person with a delinquent account's residence during the past three years during which time all or part of a gas or electric debt was incurred.

Prior to approving any cap exceptions, the MPSC Grant Administrator will forward all instances of utility bill transfers with high arrears to MPSC's staff of regulation officers. The regulation officers will investigate to ensure that the bill transfer was made in compliance with MPSC consumer standards and billing rules.

If a Grantee has any other customer utility issues that need to be investigated or resolved, a call can be placed to MPSC's regulation officers. Identify that you are a MEAP Grantee working on behalf of a customer or ask the customer to call MPSC to resolve their utility issue. Regulation officers can be reached at 800-292-9555.

3.5 Home Energy Suppliers

Energy assistance payments are issued to a home energy supplier listed on the current month's Energy Provider List. Energy Provider Lists are distributed on a monthly basis by the MPSC Grant Administrator. All home energy suppliers must be registered in the State of Michigan's SIGMA Vendor Self-Service System (VSS) (michigan.gov/VSSLogin) and also be enrolled as an eligible supplier by MDHHS. Completion of a DHS-0355, Participation Agreement For Michigan's Low Income Home Energy Assistance Program, is required in order to be enrolled as an eligible LIHEAP home energy supplier. (Appendix 3-E)

Registration in SIGMA as well as enrollment as an eligible LIHEAP home energy supplier are requirements of all home energy suppliers and vendors receiving payments from MEAP Grantees on behalf of low-income households.

3.5.1 Revisions or Corrections

SIGMA Vendor Registration: Revisions or corrections to vendor registration through SIGMA should be done through the SIGMA Vendor Self-Service portal: michigan.gov/VSSLogin. Additional guidance and reference documents are available on the SIGMA VSS login page.

MDHHS Enrollment: Revisions or corrections to a supplier's MDHHS enrollment must be submitted in writing, by the supplier, on a DHS-0355 or their business letterhead and sent directly to the Provider Management Payments Unit.

Please submit provider enrollment or change requests to:

Mailing Address:
Michigan Department of Health and Human Services
Provider Management Unit
Grand Tower, Suite 1402
235 S. Grand Avenue Lansing, MI 48933-1802
Email: MDHHS-Provider-Management@michigan.gov
Fax: (517) 241-7508

3.5.2 Vendor Payments Tax Reporting

The Grantee is required to issue a 1099-Misc Form to each provider or vendor who receives $600 or more in MEAP funds.

See '*Specific Instructions*' IRS Instructions for the 1099-MISC.

3.6 Energy Assistance Underpayments, Overpayments, and Refunds

Grantees are responsible for correcting and resolving any overpayments or underpayments made in error to a home energy provider or vendor on behalf of a MEAP applicant household, regardless of when the error occurred or is discovered.

3.6.1 Underpayments

In the event of an underpayment, it is the responsibility of the Grantee to determine the amount and authorize a supplemental payment that will resolve the underpayment. The Grantee must provide the MPSC with supporting documentation that verifies all supplemental payments made to energy providers and vendors to resolve underpayments.

3.6.2 Overpayments

MEAP payments that result in account credit and are beyond what is required to address the presenting energy need are considered an overpayment and must be refunded by the provider. In the event of an overpayment, it is the responsibility of the Grantee to determine the amount that was overpaid and request that the energy provider or vendor return any overpayment. The request for a refund must be in writing, include the mailing address for the return, and identify the account that was incorrectly authorized or overpaid. Please allow the provider 14 days, from the date notified of the overpayment to refund the money.

The MEAP Grantee must provide the MPSC with supporting documentation that verifies all overpayment refunds received from energy providers and vendors. In instances where a provider fails to return funds or is not cooperative in returning funds, please notify the MEAP Grant Administrator at MPSC.

Exceptions to this apply for customers enrolled in an Affordable Payment Plan. In these plans, a credit balance may occur which will be applied to projected and budgeted costs and/or addressed in an account reconciliation. When a household is disenrolled in a MEAP-funded Affordable Payment Plan, and the account is credited with a MEAP payment after disenrollment that is considered an overpayment, and the credit amount must be refunded by the provider.

3.6.3 Refunds

If an energy supplier or vendor refunds an energy assistance payment to a Grantee during the grant term, the refund may be used to serve additional eligible households during the grant term.

However, if an energy provider or vendor refunds an energy assistance payment to a Grantee after the grant term has ended, the refund must be returned to the State of Michigan. Monies refunded after the grant term has ended cannot be used to provide services to additional eligible households. Any and all refunds received after the end date of the grant term must be returned to the State of Michigan.

The check should be made out to *State of Michigan* and mailed to:

State of Michigan
Department of Licensing and Regulatory Affairs
PO Box 30015
Lansing, MI 48909

Include the following information with the returned check:

- MEAP Grant No.
- Case No. U-17377
- Check No. and amount
- Original assistance amount and original date of assistance
- First and Last Name of account holder
- Note the specific MEAP grant on the memo line of the check to ensure funds are returned to the proper account. (e.g., FY 2026 MEAP Grant)

3.6.4 Reconciling the Validation Tool

The validation tool is an Excel worksheet. Grantees paste their applicant lists for energy payments and self-sufficiency services into the validation tool worksheet, ensuring the data is in the correct format and order. The tool checks data integrity and identifies high-level data entry errors early, helping users to correct issues prior to submission. By catching errors up front, the tool improves workflow efficiency, reduces the number of applicant lists that must be deleted from Salesforce due to data quality issues, saves users time, and provides greater confidence that the submitted information is accurate and complete.

In order to document an underpayment, overpayment, or refund of an energy payment during the current grant term, the Grantee must also correct the household assistance file in the Salesforce Validation Tool.

- Make the correction to the account holder information.
- Make the adjustment in the month the correction occurred.
- Also document in the applicant's individual file / assistance record.

For example, if the Grantee's household assistance file reflects $200.00 for the month of October, but the payment was refunded in full in December, the grantee must reflect an adjustment of ($200.00) to the household assistance file for the same applicant in the period that the adjustment is recorded (December).

List of Appendices Related to Section 3

Appendix 3-A APP Enrollment for SER Co-payment Form

(To be provided at a later date)

Appendix 3-B SER Co-Payment Details and Examples

Appendix 3-C Non-Covered Services - HPP Example

Appendix 3-D Sample Exception Request Spreadsheet

(To be provided at a later date)

Appendix 3-E DHS-0355

DHS-0355, Participation Agreement For Michigan's Low Income Home Energy Assistance Program

Appendix 3-F Suspected Theft/Fraud Flow Chart

Appendix 3-G Example Late Fees

Section 4.0 The Application Process

Eligibility for MEAP was broadened with the December 2024 MEAP reforms, and the process for determining eligibility can be complex. To be considered for MEAP eligibility, a MEAP application must be submitted (Appendix 4-A). A MEAP Application File Sampling Checklist is provided as Appendix 4-B.

Eligibility considerations and processes are provided in detail in this section. Questions regarding eligibility determination should be directed to the MEAP Grant Administrator for clarification.

4.1 Applicant Income Eligibility

Income guidelines for MEAP are legislatively mandated and are based on 60% State Median Income (SMI) as published each year by the Federal government.[21] An applicant may be determined eligible through the Grantee's use of the Excel-based Income Calculation Worksheet or determined eligible through participation in a categorical eligibility program. (Sample attached as Appendix 4-C) For example, SER Eligibility is based on income at or below 150% FPL.[22] If determined eligible for SER services, the applicant is categorically eligible for MEAP assistance.

4.1.1 Eligibility Considerations

When determining eligibility, Grantees will need to consider the following:

- Available funding levels
- Eligibility factors including Michigan residency
- Identity verification
- Household members – included and excluded members
- Income Guidelines and Categorical Income

The grantee must verify the identity of the applying individual. It is not necessary to verify the identity of all household members. The following are examples of acceptable documents for verifying identity:

- Driver's license. Include a copy of the back of the driver's license if an address change has been processed.
- State-issued identification.
- School-issued identification.
- Document indicating an applicant's receipt of benefits under a program which requires verification of identity (Supplemental Security Income, Retirement Survivor's Disability Insurance).
- Identification for health benefits.
- Voter registration card.

---

[21] FY27 State Median Income (SMI) by Household Size

[22] 100 Percent, 110 Percent and 150 Percent of the Federal Poverty Guidelines (FPG) for 50 states and the District of Columbia Published on January 15, 2026, by the U.S. Department of Health and Human Services; for mandatory use in FY 2027

- Birth certificate/record.
- U.S. military card or draft record.
- U.S. passport.
- Military dependent's identification card.
- Certificate of Degree of Indian Blood, or other U.S. American Indian/Alaska native tribal document.
- U.S. Coast Guard Merchant Mariner card.

4.1.2 Categorical Eligibility Sources

While categorical eligibility does not provide all of the information needed to determine energy security benefits, it does allow for a more streamlined path to determine eligibility for MEAP services. The Michigan Energy Assistance Act in "MCL 400.1234a Eligibility guidelines; exception for providers, Sec. 4a"requires that "The department may establish guidelines for verifying eligibility of all applicants to ensure assistance funds are provided only to eligible low-income households. In establishing guidelines under this subsection, the department shall consider opportunities to incorporate categorical eligibility."

In response, the Department has identified eight sources of categorical eligibility for MEAP crisis assistance and five sources for assistance with MEAP Home Energy Security services. While the demonstration of need for crisis assistance does not vary based on income, the demonstration of need for Home Energy Security services relies on energy burden per MEAP policy. Energy burden is calculated by utilizing annual income and annual home energy expenses, therefore, the income verified via the categorical eligibility source may be used to determine the income threshold. Alternately, an applicant may choose to provide income documentation if that would result in a lower income calculation and thereby a greater benefit. In the 2026 program year, self-attestation was used as a transitional policy but is not considered a verification method.

Approved categorically eligible income verification sources for program year 2027 include the following five sources for Home Energy Security assistance and an additional three for crisis assistance:

1) Approval of LIHEAP State Emergency Relief (SER) Income Eligible at 150% FPL or less for any energy commodity may be used to verify eligibility even if not necessarily fulfilled or received.
    - Documentation includes: MDHHS SER data share through Salesforce, MI Bridges navigation, applicant supplied screen shot from MI Bridges, or applicant supplied determination letter.

2) LIHEAP Home Heating Credit (HHC) with an income eligibility threshold of 110%FPL and approved for tax years 2025 or 2026.
    - Documentation includes: HHC Payment posted to a customer account verified through the energy provider's portal, applicant-supplied check

stub or payment documents, or applicant-supplied screenshot of the status of their HHC application on Treasury site.

The following income sources may be documented through an applicant supplied determination letter and several may also be verified through MI Bridges navigation or a screen shot from MI Bridges. WIC, HEADSTART & SSI are not available on MI Bridges for verification. Self-attestation can be utilized as a last resort.

3) Current Temporary Aid for Families (TANF) Recipient

4) Current Women, Infants, Children (WIC) Recipient which has an income eligibility threshold of 185%FPL

5) Head Start Participant Which has an income eligibility threshold of 130% FPL

These additional categorical eligibility sources may be used for crisis assistance:

6) Current Supplemental Nutrition Assistance Program (SNAP) Recipient which has an income eligibility threshold of 200% FPL.

7) State Disability Assistance (SDA) Recipient

8) Supplemental Security Income (SSI) Recipient

See Section 4.8 Applicant File for specific documentation requirements. Additional categorical eligibilities may be considered at the discretion of MDHHS and the MPSC.

4.1.3 Validating Income Eligibility for Those Not Categorically Eligible

When a household is not categorically eligible for MEAP, the household's income must be calculated using the MPSC provided income calculation worksheet and the income documentation supplied by the applicant seeking energy assistance. Given that households are the basic unit of eligibility, income should be determined for the house as a whole. Verify income of all household members.

When calculating household income, the following should be considered:

Residence: Presence in Michigan, not permanent residence, is required for MEAP eligibility. The utility service address must be in Michigan for MEAP Eligibility.

Household Composition: A single household consists of persons who occupy the same home. Home means the place where the members of the household keep their personal belongings and sleep. A home may be an apartment, a house, a mobile home, or a rented room. Consider a homeless family or group of individuals as a single household if they previously lived together in the same home and plan to do so again when they find permanent housing.

1) Included Household Member

a. Adults and dependent children who normally live together are in the same household.
b. Persons temporarily absent due to illness or employment are also in the same household.
   Note: Household members who are absent from the home for 90 consecutive days or more are not counted as part of the household.

2) Excluded Household Members - Do not include the following persons in the household income:
   a. Visitors in the home who do not normally live with the household.
   b. Renters who live with the MEAP household, provided a fair market rental rate is paid. Include the rental income in determining the household's eligibility.
      i. See HUD User Fair Market Rents by County located online at huduser.gov/portal/datasets/fmr.html
      ii. Verify the household's payment of fair market rent by cancelled checks, money order carbons, or landlord's federal or state tax return showing rental income.
   c. The household's landlord provided the household pays fair market rent to live in the home.

Income Eligibility: A household is income-eligible with an income of not more than 60% SMI. The Federal Guidelines for State Median Income are available online at FY27 State Median Income (SMI) by Household Size and the Federal Poverty Level Guidelines are available online at Federal Poverty Guidelines for FY27.

Documentation of income: Income of all household members must be thoroughly documented and verified using third-party documentation. The applicant must provide proof of all income for the past 30 days. The following items are examples of acceptable income verification documentation.

- Copies of checks or check stubs if dated within the last 60 days
- W-2; Federal tax forms (1040, 1040EZ, etc.); Michigan state tax forms (MI-1040, etc.).
- Written statements from employers. Written statements from the department, organization or person administering the payment, which show the monthly amount of the benefit, the amount of deductions, and confirm whether or not the deductions are mandatory.
- Written statements of persons paying money to an applicant household member in cases where the household member provides childcare, chore services, room and board, or other services for pay.
- Alimony or spousal support statements/letters.
- Interest, annuities or dividends statements/letters.
- DHHS-38 Verification of Employment
- Business receipts.
- Accounting and other business records for self-employed persons.

- Electronic data exchange verifying income with reliable sources.

Income Considerations: Household income refers to total cash receipts before taxes from all sources and for all household members.

1) Countable Earned Income
   a. Earnings from work as an employee (wages, salary, college work-study, commissions, tips).
   b. Earnings from self-employment (includes USDA PIK income).
   c. Training allowances paid to persons enrolled in sheltered workshops.
   d. Rental income, room and board.
   e. Child Development and Care (CDC) and Chore services payments to providers paid by MDHHS
2) Allowed Expenses for Earned Income - Net income from employment or self-employment must be determined by deducting allowable expenses of employment from the gross amount received. Expenses of employment are limited to the following:
   a. Mandatory withholding taxes (25 percent of the gross for employment and 50 percent for self-employment and room and board).
   b. Deductions required by the employer as a condition of employment.
   c. Deductions for health insurance
   d. Court-ordered child support paid, including arrears. Expense amount cannot exceed the court ordered amount; no deduction is made for paid, voluntary child support.
   e. The cost of dependent care for either of the following:
   f. A dependent child who is less than 13 years old.
   g. A person who is 13 years old or older who needs care due to mental or physical impairment.
      - Deduct the unsubsidized cost of care or $200, whichever is less for each qualifying individual. The cost of dependent care must not be allowed as a deduction from the earnings of more than one member of the SER (i.e., State Emergency Relief) group.
      - Do not deduct the cost of childcare if caregiver is any of the following persons:
        - A member of the SER (i.e., State Emergency Relief) group.
        - A responsible relative of the employed person or of the person who needs care. A dependent relative of the employed person.
        - A person who is not a member of the SER (i.e., State Emergency Relief) group, if the care can be provided reasonably and safely by one of the following persons living in the home:
        - A member of the SER (i.e., State Emergency Relief) group.
        - A responsible relative of the employed person or the person who needs care.

- A dependent relative of the employed person.

3) Countable Unearned Income
   a. FIP (Family Independence Program).
   b. SDA (State Disability Assistance).
   c. Social Security benefits – use the gross amount received.
   d. RSDI - Retirement Survivor's Disability Insurance.
   e. SSI - Supplemental Security Income. Note: Do not count reimbursement of Medicare premiums.
   f. SSI State Supplemental payments.
      Note: Budget the actual amount if it is expected to be received in the countable income period. (For example, do not budget $14 per month as a prorated amount when the $42 check is received quarterly.)
   g. Alimony, child support and child support participation payments.
   h. VA benefits, except clothing allowance or the court ordered amount for aid and attendance.
   i. Lump sum payments of accumulated monthly benefits.
   j. Payments from sick and accident insurance plans.
   k. Pensions and retirement benefits.
   l. Unemployment benefits, railroad unemployment benefits, and other governmental unemployment benefits.
   m. Worker's compensation.
   n. Strike benefits.
   o. Income received from the sale of property.
   p. Military allotments.
   q. Investment income, such as dividends, interest and royalties paid directly to the applicant.
   r. Income from annuities, bonds, stocks and trusts.
   s. Adoption assistance payments.
   t. Refugee Resettlement Funds. If an applicant receives resettlement funds, email the policy mailbox at Policy-SER@michigan.gov.
   u. Guardianship Assistance Program (GAP) payments.

4) Allowable Expenses for Unearned Income - Net unearned income must be determined by deducting all of the following from the gross amount received:
   a. Mandatory withholding taxes
   b. Court-ordered child support paid, including arrears, but not more than the amount ordered by the court. No deduction is made for paid, voluntary child support.
   c. Payments for health insurance.
   d. Medicare premiums that will not be reimbursed.

5) Do not count or verify income from the following sources:
   a. AmeriCorps income.
   b. Income of non-responsible group members in burial cases.

c. Reimbursement of Medicare premiums.
d. Income in kind (not in the form of cash).
e. Earned income of a dependent child when both of the following conditions are met:
    - The accumulated earnings are held in a savings account of which the dependent child who earned the money is the sole owner.
    - The accumulated earnings are not commingled with money from any other source; see ERM 205, Assets.
f. Michigan Homestead Property Tax Credit and Home Heating Credit.
g. Earned Income Credit.
h. All services program benefits paid by the department on behalf of a SER (i.e. State Emergency Relief) group member (such as foster care payments).
i. Income of the SER applicant's spouse when the applicant is in an emergency shelter as a victim of domestic violence.
j. Reimbursement for past, current or future training-related, medical or volunteer expenses.
k. Compensation awarded for a particular use (such as Victim's Compensation Award).
l. Disaster relief assistance.
m. Childcare payments and allowances made by DHHS.
n. Housing assistance that is paid pursuant to any state or federal law. Examples include:
    - Title II of the Uniform Relocation and Real Property Acquisition Act of 1970.
    - U.S. Housing Act of 1937.
    - Experimental Housing Allowance Program made under Annual Contribution Contracts entered into prior to January 1, 1975.
    - National Housing Act.
    - Section 101 of the Housing and Urban Development Act (HUD) of 1965.
o. Educational grants, scholarships and benefits.
p. Family support subsidy payments.
q. WIC program benefits.
r. Title VII nutrition program for the elderly.
s. LIHEAP energy assistance benefits.
t. Child nutrition and school lunch benefits.
u. Food assistance benefits.
v. Guaranteed Income Program (GIP)- GIP is also known as Universal Basic Income Program (UBI). These payments are funded by private and public funds. Examples include:
    - Detroit Jump Start.
    - RX Kids.
    - Grow Ann Arbor (GIG 2).
    - Washtenaw County Community Housing Prioritization.

Income Computations: Establish the household's income computation period and determine the household's countable income for the period.

- Computation Period – the computation period is 30 days. This is referred to as the countable income period. The 30-day period begins the date the agency receives a signed application for energy assistance.
- Countable income: verify and determine all non-excluded gross income the household expects to receive during the income computation period.

Reverification of Eligibility: Household eligibility must be re-verified if a change in the household is reported each time energy assistance is requested. Household changes include but are not limited to the following: change of address, income, or household composition or no longer categorically eligible.

4.2 Eligibility for Crisis Assistance

Although crisis is defined by PA 170 of 2024, the legislation does not mandate a crisis season nor require an applicant to be in crisis to be eligible for MEAP. To be eligible for crisis assistance under MEAP, an applicant must meet the definition of "Crisis" which means one of the following:

- An individual or recipient has received a past due notice on an energy bill for the individual's or recipient's household.
  - Include an account statement showing the past due charges in the applicant file.
- A residential fuel tank is estimated to contain not more than 30% of its heating fuel capacity.
  - Grantees should include in the applicant file a quote for deliverable fuel. The quote may be a verbal estimate over the phone, but the following information is required:
    - Date of the quote,
    - Applicant name (and name on account if different),
    - Customer number,
    - Amount needed to resolve the emergency or tank at 30% or less,
    - Name of the person at the home energy supplier who provided the information,
    - Signature of the grantee's staff person obtaining the information.
    - Any other pertinent account information,
- A stated need for deliverable fuel or a non-traditional fuel source in which there is no meter or regular energy bill provided.
- A notice that the balance in a prepayment account is below a minimum amount.
  - Payment may be made on a prepayment account for natural gas or electric services when the balance remaining in the account does not exceed $100. If the prepayment account does not have a balance, the amount of assistance

cannot exceed the equivalent of the MEAP Customer's average of one month's billing cycle.

A household can apply for crisis assistance as many times as needed until they reach the crisis benefit caps listed in Section 3.4. However, subsequent crisis applications should be considered an opportunity to encourage enrollment in an APP or be utilized as part of a Home Energy Security Allowance as outlined in the next section. These programs are intended to reduce energy insecurity and reduce the frequency of crisis situations.

Crisis and energy security assistance can be applied in various combinations as illustrated below:

- Example 1: A MEAP eligible household IS in crisis and IS energy burdened; the crisis is resolved up to the crisis payment cap noted in section 3.4, and the household agrees to a HESA.
- Example 2: A MEAP eligible household IS in crisis and IS energy burdened; an arrears forgiveness payment up to $600 is applied in lieu of crisis assistance and the household is enrolled in an APP.
- Example 3: A MEAP eligible household IS in crisis but IS NOT energy burdened; a crisis payment is applied up to the caps outlined in Section 3.4, and the crisis is resolved. If the crisis is not resolved, an exception may be requested.
- Example 4: A MEAP eligible household IS in crisis and IS energy burdened, the crisis payment is applied up to the cap, and the crisis is resolved but the household has elected not to enter a HESA or an APP.
    - If the customer elects not to enter a HESA or an APP, and the crisis assistance will not resolve the crisis, an exception would not be requested, and crisis assistance would not be provided.*

4.3 Eligibility for Home Energy Security Assistance

MEAP bill payment assistance can be thought of as achieving two distinct goals: 1) addressing energy crisis, and 2) reducing energy insecurity.[23] These should be offered to an applicant to prevent future energy crises. MEAP eligible households deemed energy burdened may also qualify for home energy security assistance. "Energy burden" is defined for LIHEAP as "the expenditures of the household for home energy divided by the income of the household." and is represented by the following formula:

$$\frac{Total\ Energy\ Costs}{Household\ Income}$$

[23] While MEAP eligible households that are not in crisis, and not energy burdened are not eligible for direct payment assistance, they remain eligible for self-sufficiency services.

National resources and leaders in the energy sector indicate 6% as a critical energy affordability threshold.[24] Based on findings from benefit matrix analyses, MEAP identifies energy burden as a foundational factor in home energy security assistance and aims to bring all participants towards the following energy burden target goals: 6% for dual electric and natural gas commodity or all electric customers, 4% for electric customers, and 2% for natural gas customers.

In contrast to crisis assistance, which is more acute in nature, households eligible for home energy security assistance may receive more prolonged relief in the form of a Home Energy Security Allowance or an Affordable Payment Plan (See Section 4.3.1 and 4.3.2 respectively). APPs are now being designed using an energy burden framework to facilitate greater affordability of energy costs for MEAP eligible households.

Energy insecurity is addressed through an Affordable Payment Plan (APP), where available, or a Home Energy Security Allowance (HESA) when an APP is not available through the applicant's home energy provider. An APP can be accessed per utility commodity by the applicant once in a program year and carries on past year end. The HESA may be accessed by the applicant up to 4 times in a program year up to the amount of the allowance.

If a home energy supplier offers an APP, the MEAP applicant would not be eligible for a HESA for the commodity for which an APP is offered. However, if for example their electric supplier offers an APP, they would be eligible for a HESA for their heating source provided their heating supplier does not also offer an APP.

When determining household eligibility for home energy security assistance, the following steps should be taken:

1) Determine MEAP eligibility. Households must be eligible for MEAP to qualify for MEAP Home Energy Security Assistance.

2) Compile or collect the following information:
   a. Countable Income
   b. Energy Provider(s) Name
   c. Commodity Type(s)[25]
   d. Energy Bill Costs for APP utilities
      - Grantee's have generally received the annual energy usage information from the utilities, either when establishing APPs, providing energy conservation, or budgeting services. The information may also be obtained

[24] See the US Department of Energy 2024 and the American Council for Energy-Efficient Economies 2024

[25] The MEAP Benefit Calculator calls for an average of monthly costs (annual energy costs divided by 12 months). If annual costs cannot be demonstrated, a note should be placed in the client file. A single month's cost can be substituted for the energy burden calculation when other means have been exhausted.

from having access to the utilities online portal and a screenshot would be acceptable documentation to maintain in the file.

3) Determine the household's energy burden using the MEAP Benefit Calculator.
   a. If household is energy burdened, proceed to next step.
   b. If household is not energy burdened, consider crisis assistance, where applicable.[26] If household does not qualify for crisis or home energy security assistance, the household should be deemed ineligible for MEAP direct assistance. Self-sufficiency services may still be provided.

4) Determine if the household's energy provider offers an Affordable Payment Plan.
   a. For energy providers that do offer an Affordable Payment Plan, enroll the household. If an APP is not available, such households should be offered a HESA.
   b. For energy providers that do not offer an Affordable Payment Plan, assess the household's energy burden and determine their home energy security allowance. The home energy security allowance is an annual amount the household can request up to four times a year. Households cannot be enrolled in a HESA if their utility for that commodity offers an APP. The HESA can be accessed by submitting an abbreviated application form. Exceptions may be requested. For exception policy, see section 3.4.1.

See Section 4.1. for guidance on eligibility determination and 4.1.3 for income verification.

4.3.1 APP Terms and Conditions

The APP Terms and Conditions including the customer's payment expectation, true-ups, disenrollment criteria, and the duration of enrollment must be provided along with the determination notice indicating approval. It is recommended to include the Terms and Conditions with the enrollment letter.

APP Enrollment Process

To enroll in an APP, a customer must meet general MEAP eligibility criteria, have no unaddressed theft or fraud on their account, and be a residential customer of an APP participating home energy supplier. The enrollment process outlines the steps required for an applicant to receive MEAP services after initial contact:

1) Application Submission: The applicant submits a completed MEAP application along with all required documentation. For applicants who are categorically

[26] An applicant may request assistance to reduce their energy insecurity without being in crisis, may experience energy crisis without having an energy burden that warrants assistance per MEAP policy or may be in crisis and qualify for on-going assistance to reduce energy insecurity. Applications for crisis and the reduction of energy insecurity may not always be sequential.

eligible (e.g., participation in qualifying assistance programs), income verification must be completed to determine the benefit level. Otherwise, a customer may be enrolled in the highest benefit tier with the lowest monthly credit amount. The MEAP Benefit Calculator, which facilitates the energy burden calculation, allows for categorical income to be entered based on a chart available within the Income Calculator worksheet.

2) Application Review: The Grantee reviews the application for completeness and verifies eligibility criteria, including income, Michigan residency, household composition, and crisis status (if applicable).
3) Eligibility Determination: A determination is made based on program guidelines. Additional documentation may be requested if needed.
4) Determination Notification: The applicant receives a written notice outlining approval or denial, including services to be provided or reasons for ineligibility.
5) Self-Sufficiency Service Provision: As applicable for the household, applicants may be provided with MEAP self-sufficiency services, which may include energy assistance payments, energy education, or budget counseling.
6) Vendor Coordination: Payments are coordinated with the applicant's home energy supplier to resolve the energy need. Each home energy supplier will have a preferred method of communication regarding agency payments. The home energy supplier may offer an agency portal with specific instructions for notifying the vendor of enrollment or may have a designated email box for payment coordination.
7) Follow-Up and Case Management (if applicable): Ongoing support may be provided to ensure energy stability, including additional services or referrals.

APP Customer Payments

All available MEAP Affordable Payment Plans are modeled after the Modified Budget Affordable Payment Plans. Under a Modified Budget APP, a customer will receive a consistent monthly bill subsidy applied to their energy account throughout the course of their enrollment in the APP. Customer payments are set on a flat monthly budget amount, which is calculated based on usage and income tiers. This monthly budget amount could change after periodic budget review and may be impacted by their usage in prior months. If a customer uses more energy than usual, the customer will experience a true-up and the bill amount the customer is responsible for will be adjusted. Budgets will be reviewed at six, twelve, and eighteen months and at least annually thereafter. Monthly payments are adjusted only for a minimum of plus or minus five dollars (+/- $5.00).

To participate in an APP, the minimum customer obligation is ten dollars ($10.00) per month.

APP Arrears Forgiveness

APPs include an arrearage forgiveness component. Crisis payments should not be used to assist households for commodities in which the household is enrolled on an

APP. Within 30 days of enrollment, a customer may have their arrears forgiven up to an initial cap. At the completion of one year on the APP, up to an additional amount may be forgiven. If a customer still has arrears remaining at the end of year two or beyond, up to an additional amount may be forgiven as needed.

FY 2027 Cap Amounts for APP Arrears Forgiveness

1) Initial arrears forgiveness not to exceed: $600
2) Annual arrears forgiveness, as needed: $600

APP Annual Reconciliation

At the completion of one year on the program, a reconciliation credit will be applied to the customer's account if the reconciliation amount is greater than zero. To promote self-sufficiency, in year two of enrollment and beyond, the customer will be responsible for any difference resulting from reconciliation.

APP Term

APPs are not term-limited as long as a customer remains eligible to participate, which is determined through a revalidation process. APP revalidation periods vary based on household income status. Households not on fixed incomes, who have the opportunity or likelihood of employment income, may remain enrolled for two years until revalidation is required. A household with fixed income in the form of regular, predictable payments such as retirement or disability income without household members who have income from employment may remain enrolled for four years until revalidation is required.

APP Plan Conclusion

A plan will be considered to have concluded if a customer voluntarily disenrolls, has a lapse in eligibility, or if the account closes for any reason including the customer moving out of the energy provider's service area. If a customer voluntarily disenrolls or has a lapse in eligibility, the energy supplier will issue a disenrollment letter, and the customer will automatically be enrolled in a budget plan. A customer then has the option of disenrolling in the budget plan at any given time.

APP Communication

See Section 6.4.2 for details on APP communication protocols.

Disenrollment Processes and Credits

If a customer misses the equivalent of two monthly payment amounts, the customer will be disenrolled. When a customer is disenrolled, previously applied MEAP credits will remain on the customer's account and do not need to be reversed upon program default. At that point, the customer will be responsible for any remaining arrears balance and/or past due monthly payments. A customer may apply to re-enroll in the following program year.

APPs are now being designed using an energy burden framework to facilitate greater affordability of energy costs for MEAP eligible households. For new APP

participants any additional payments for customers to prevent disenrollment from an APP would be considered an exception and should be shared with the MEAP Grant Administrator for pre-approval. If a household falls off an APP, they cannot be offered a HESA in its place. For customers who have fallen off, assess their eligibility for a crisis payment.

For the 2027 program year, an APP participant who enrolled in an APP prior to October 1st, 2026 and is at risk of default, a one-time crisis payment may be used to prevent default. However, for those enrolling on October 1, 2026 or after, if an applicant defaults on an APP in one program year the applicant household must wait until the next program year to re-enroll. Depending on eligibility, SER or MEAP crisis assistance may help bridge the gap until the customer can re-enroll in the subsequent grant year.

If a customer disenrolls in an APP due to a move from an area with access to APPs to an area without access to an APP, the customer may transfer over to a HESA provided the MEAP APP energy security monthly credits received during the grant year are subtracted from the HESA for the same commodity. In the current grant year, they can also access crisis assistance, up to the cap if still eligible, and self-sufficiency services as needed. The APP arrears forgiveness is not counted toward the crisis cap.

Transfer of Service

Benefit formulas and calculations including gap credit amount and breakpoints for tiers are provided by the MPSC, via the MEAP Benefit Calculator. However, the gap credit amount is dependent, in part, on individual energy provider data, which means that gap credit amount can vary due to each provider having a different rate and cost structure.

During transfer of service with the same home energy supplier, the customer budget should be treated the same as if they did not move so that their reconciliation credit is not impacted.

If an APP customer moves and establishes an account with a different home energy supplier participating in Affordable Payment Plans, they may apply with a MEAP grantee to be enrolled in an APP with their new home energy supplier. However, if they have received a HESA (Section 4.3.2), they would continue with the HESA for the remainder of the program year and may seek assistance within their home energy security allowance with the new home energy supplier. The customer would be eligible to participate in the new home energy supplier's APP in the following program year.

4.3.2 Home Energy Security Allowance (HESA)

The Home Energy Security Allowance offers an alternative energy security assistance option for customers without access to Affordable Payment Plans.[27] A HESA provides

[27] If a home energy supplier offers an APP, the MEAP applicant would not be eligible for a HESA for the commodity for which an APP is offered. However, if for example their electric

the customer with an opportunity to access assistance funds more easily and in a proactive manner, with the goal of preventing utility disconnection and prolonging household energy security. MEAP HESA eligibility is valid for the fiscal year.

Upon determination of eligibility, the HESA can be accessed by households up to four times a year not including initial crisis assistance. Unlike APPs, HESA does not contain an arrearage forgiveness component. MEAP eligible HESA households ARE eligible to seek initial crisis assistance through SER and/or MEAP to help with arrears on metered fuel accounts.[28] While a single HESA request can seek assistance for more than one commodity, each application is counted toward the maximum of four applications. Applicants are encouraged to proactively plan and budget for the optimal time to utilize their HESA. For example, a customer seeking a HESA request for both their electric and natural gas would count as one HESA request. If they came back, and sought HESA only for electric, this would count as their second HESA request.

The HESA is determined by an annual benefit matrix. The annual benefit matrix for the HESA considers applicant income, energy burden, and usage. The benefit matrix determines the maximum amount each household can apply for in subsequent applications within the fiscal year. Please refer to the MEAP Benefit Calculator for this year's HESA benefit matrix.

Applicants may apply for electric and heating assistance in a single HESA request; households are allowed up to four requests a year, regardless of commodity. While HESA allows for up to four eligible household requests, HESA requests are subject to MEAP fund availability and households are not guaranteed that all requests will be met.

To access the HESA, households must meet general MEAP eligibility criteria, have no unaddressed theft or fraud on their account, and be a residential customer of an opt-in electric utility. The enrollment process outlines the steps required for an applicant to receive MEAP HESA services after initial contact:

1) Submit a MEAP Application: The applicant submits a completed MEAP application along with all required documentation. For applicants who are categorically eligible (e.g., participation in qualifying assistance programs), income verification must be completed to determine the benefit level. Otherwise, a customer may be enrolled in the highest income tier allowed for the categorical eligibility source and receive credit amount associated with that threshold. For

---

supplier offers an APP, they would be eligible for a HESA for their heating source provided their heating supplier does not also offer an APP.

[28] An applicant can receive both a crisis payment and the first of four HESA payments with an initial MEAP application, however, eligible customers are limited to four HESA applications a fiscal year and this should be considered when recommending coupled benefits. For example, if a customer is seeking assistance and the crisis payment is sufficient to address the crisis and resolve the urgency, it may be beneficial to postpone their first HESA payment for a future time.

example, if a customer qualifies through Home Heating Credit Categorical Eligibility, their income would be entered at the level of 110% FPL for their household size. The MEAP Benefit Calculator, which facilitates the energy burden calculation, allows for self-attested income to be entered. This feature should only be utilized for categorically eligible households.

2) Application Review: The Grantee reviews the application for completeness and verifies eligibility criteria, including income, Michigan residency, household composition, and crisis status (if applicable).
3) Eligibility Determination: A determination is made based on program guidelines. Additional documentation may be requested if needed.
4) Determination Notification: The applicant receives a written notice outlining approval or denial, including services to be provided or reasons for ineligibility.
5) Self-Sufficiency Service Provision: As applicable for the household, applicants may be provided with MEAP self-sufficiency services, which may include energy assistance payments, energy education, or budget counseling.
6) Vendor Coordination: Payments are coordinated with the applicant's home energy supplier or fuel provider to resolve the energy need. Each home energy supplier will have a preferred method of communication regarding agency payments. The home energy supplier may offer an agency portal with specific instructions for notifying the vendor of enrollment or may have a designated email box for payment coordination.
7) Expedited Access to HESA: As needed, the applicant can submit an abbreviated application form to draw down from the HESA up to four times a year. The application will contain language confirming that no major changes have occurred since their last application within the program year (e.g., household service address, household income, etc.). Given that the applicant has been previously determined eligible for the MEAP HESA, the request should be reviewed for confirmation of the following criteria prior to payment processing:
    a. Applicants' continued eligibility for MEAP and HESA
    b. Applicant's HESA amount remains the same
    c. The request falls within the four-request limit
    d. The request falls within the commodity caps[29]
8) Additional Determination Notice: The applicant receives a written notice outlining approval or denial of the home energy security allowance request, including services to be provided or reasons for ineligibility. Unless approval

[29] The commodity caps will be included in the MEAP Benefit Calculator. The HESA benefit amounts take income, energy burden, and commodity into account. The MEAP Benefit Calculator will illustrate how much to the customer in the grant year (their commodity cap) and will indicate how much is remaining by inputting the sum of prior requests.

confirmation of the application is received, the applicant is responsible for payment.

The Home Energy Security Allowance does not contain an arrearage forgiveness component. In addition to seeking MEAP HESA Assistance, MEAP Applicants may seek crisis assistance through SER and MEAP to help with arrears on their metered fuel accounts. If a participant fully expends their HESA and subsequently experiences an energy crisis, they are eligible for crisis assistance up to their remaining annual crisis commodity caps.

A Home Energy Security Allowance is available to an applicant to draw from up to the allowance amount as long as funding remains available to serve them. To prevent program-year funding from remaining unspent, the HESA is not set aside for the applicant. Grantees might provide budgeting services to applicants to plan the best strategy for the use of this resource.

4.4 Determination Notice

A determination notice indicating eligibility status should be given to all applicants notifying whether the application was approved or denied. If the application is approved, the notice should include any contributions the household must make to resolve the emergency. If the application is denied, the notice should include the reason for denial. All eligibility notices must include information on how to request a review of denial.

Grantees may have a generic letter available that should be given to applicants upon determination. A copy of the letter is not required as part of the file documentation. A determination notice form is provided as Appendix 4-D.

4.4.1 Missing Documents

If required documentation is not provided at the time of application, the applicant must be notified of all missing items needed to complete the eligibility determination. The notification must include:

- A clear and detailed list of all missing documents required to process the application (e.g., proof of income, applicant identification, energy bill copy, crisis verification, etc.)
- The deadline for submission of the requested documents is within 8 business days of application submission. Applicants are responsible for submitting complete and accurate documentation within the specified timeframe. Failure to provide required documents may result in denial of assistance.
- Instructions on acceptable methods for submitting documentation (e.g., in-person, email, mail, or electronic upload). Applicants may resubmit missing documentation using any of the approved submission methods provided by the Grantee. Upon receipt, the Grantee must review the documentation and proceed with the eligibility determination. If documentation remains incomplete, additional follow-up may be required before a final determination is made.

Expectations for Resubmittal: Applicants are responsible for submitting complete and accurate documentation within the specified timeframe. Failure to provide required documents may result in denial of assistance.

Resubmission Process: Applicants may resubmit missing documentation using any of the approved submission methods provided by the Grantee. Upon receipt, the Grantee must review the documentation and proceed with the eligibility determination. If documentation remains incomplete, additional follow-up may be required before a final determination is made.

A missing documents letter is provided as Appendix 4-F.

4.4.2 Approval Process

Households who are approved for MEAP payment assistance must receive a written determination notice indicating approval. The notice should include any contributions the household must make. If the household is approved for a home energy supplier's affordable payment plan, the terms of the program including the customer's payment expectation, true-ups, disenrollment criteria, and the duration of enrollment must be provided along with the determination notice indicating approval.

4.4.3 Denial Process

Households who are denied MEAP benefits must receive a written determination notice indicating denial including the reason for the denial. This notice must include information on how to request a review of the decision to deny and an appeal form (Request for Review, Appendix 4-F). If the applicant is denied assistance due to lack of Grantee funding, the notice should also include a referral to another Grantee that has remaining funding.

4.4.4 Reasons for Ineligibility, Denial, and Additional Options

Applicants may be determined ineligible for MEAP assistance for reasons including, but not limited to:

1) Grantee is out of funds

2) Household is a customer of an electric provider that has opted out of the LIEAF surcharge. For the 2027 Program Year, the following providers have opted out:
   - Bayfield Electric Cooperative, Inc.
   - City of Harbor Springs
   - City of Wakefield
   - Coldwater Board of Public Utilities
   - Grand Haven Board of Light & Power
   - Holland Board of Public Works
   - Lowell Light & Power
   - Marquette Board of Light & Power
   - Traverse City Light & Power

- Wyandotte Department of Municipal Service
- Zeeland Board of Public Works

3) Household income exceeds 60% of State Median Income (SMI)

4) Not providing verification of income, identity, or residency

5) Failure to provide required documentation within the designated timeframe

6) When applying for crisis assistance, not demonstrating a qualifying crisis[30]

7) Household is not in crisis and energy burden does not meet MEAP criteria[31]

8) Duplicate benefits or assistance already received exceeds program limits

9) Non-residency in the State of Michigan

10) Household is seeking assistance for non-covered services

11) Fraudulent or inconsistent information provided during the application process

Additional Options: As applicable, applicants who are determined ineligible must be provided with information on alternative resources and next steps, which may include:

- Referral to other assistance programs such as State Emergency Relief (SER)
- Budget counseling or energy conservation services
- Payment plan options with their home energy supplier
- Reapplication guidance if circumstances change
- Information on other community-based assistance programs

[30] If an applicant applies for crisis assistance and does not provide evidence that they meet the definition of crisis found in Section 1.4.1 of the MEAP 2027 Policy Manual, for example, does not have a past-due notice or need for deliverable fuel, the applicant will not qualify for MEAP crisis assistance. However, if an applicant is requesting services to reduce their energy insecurity, their energy burden would serve as a demonstration of need and evidence of a crisis is not required to demonstrate the need for APP enrollment or a HESA.

[31] The MEAP legislation prioritizes crisis and reducing energy insecurity as goals for MEAP. Beginning FY 2027, energy burden is the metric by which energy insecurity is assessed for the MEAP. If a household is not in crisis and they are not energy burdened, the household will be ineligible for MEAP direct energy assistance payments. They can, however, still receive self-sufficiency services.

4.5 Standard of Promptness

The MEAP has specific requirements for the Standard of Promptness in the eligibility determination process. These standards refer to the quality of being quick and timely in response to applications that are submitted for energy assistance. The standards require the ability to act without delay and ensure that tasks are completed to determine eligibility within a timeframe that meets a policy standard. The requirements are designed to ensure that applications are processed in a timely manner, which is crucial for households facing energy emergencies and energy insecurity.

- Do not use the standard of promptness as a basis for denial of MEAP applications.
- Continue an application if the household is cooperating within their ability to provide verification.
- Deny the application if the household is not cooperative.

4.5.1 Standard of Promptness – Crisis Assistance

When an applicant meets the definition of crisis, Grantees shall observe a 10-business day standard of promptness starting when the signed application is received by the MEAP Grantee to determine eligibility for assistance. There is no standard of promptness adjustment for holidays, weekends or non-business days; an eligibility determination must be finalized within a 30-day calendar period. The applicant file must include documentation for any delay in processing the application beyond the standard of promptness.

As a reminder, "Crisis" means one of the following: (i) An individual or recipient has received a past due notice on an energy bill for the individual's or recipient's household. (ii) A residential fuel tank is estimated to contain no more than 30% of its heating fuel capacity. (iii) A stated need for deliverable fuel or a non-traditional fuel source in which there is no meter or regular energy bill provided. (iv) A notice that the balance in a prepayment account is below a minimum amount.

4.5.2 Standard of Promptness – Energy Security Services

When an applicant requests assistance to reduce energy insecurity but does not meet the definition of crisis for the energy commodity requested, Grantees shall observe a 30-calendar day standard of promptness from date of application to determine eligibility for assistance. There is no standard of promptness adjustment for holidays, weekends or non-business days. The applicant file must include documentation for any delay in processing the application beyond the standard of promptness.

4.6 Prioritization of Vulnerable Households for Services

There is a history of prioritizing benefits and services to those deemed most vulnerable or who have the highest need. "LIHEAP statutory amendments based on Public Law 103-252 require that states consider a household's energy need and energy burden at three programmatic points: outreach activities, eligibility

determination, and provision of assistance."[32] "Energy burden" is defined for LIHEAP as "the expenditures of the household for home energy divided by the income of the household." The phrase "highest home energy needs" is described as "taking into account both the energy burden of such household and the unique situation of such household that results from having members of vulnerable populations, including very young children, individuals with disabilities, and frail older individuals."[33]

Similarly, the MEAP defines and requires prioritization of vulnerable populations. PA 170 of 2024[34] indicates that "Vulnerable populations" means eligible low-income households that have at least one member that meets the following criteria:

- Is a child under 5 years of age.
- Is an individual with a disability.
- Is an individual who is 60 years of age or older.
- Is an individual who has experienced homelessness in the preceding 12 months and who needs energy assistance to secure housing.

PA 198 of 2024[35] further indicates for MEAP that "energy assistance must prioritize vulnerable populations and, as appropriate for the household, include services that will enable participants to become or move toward becoming self-sufficient… and energy secure." Depending on the household's characteristics, the goal of becoming self-sufficient may not be suitable. For example, while self-sufficiency goals may be appropriate for households with young children and an able adult, in households comprised of individuals with a disability or who are 60 years of age or older, MEAP may be a vital safety net, year after year, to support home energy security.

4.6.1 Methods of Prioritizing Vulnerable Households in the MEAP

In Fiscal Year 2026, MEAP began prioritizing vulnerable households with the use of categorical eligibility sources in which vulnerable households participate. MEAP grantees were also required to track and report on household vulnerabilities.

For Fiscal Year 2027, MEAP will utilize a combination of approaches to prioritize vulnerable households. The MEAP will continue to utilize categorical eligibility sources outlined in Section 4.1.2 that serve many vulnerable households combined with priority processing and undergirded by priority outreach. Grantees are encouraged to implement all three of these strategies in their approach to prioritizing vulnerable households.

The MEAP suggests that grantees consider funding that is available and complete the applications that are mid-process prior to prioritizing new applications. When considering a new batch of applications, priority could be given by considering first the acuity of crisis and then the vulnerability of the household. As general guidance,

[32] liheapch.acf.hhs.gov/pubs/510targ.html
[33] Targeting LIHEAP Benefits | The LIHEAP Clearinghouse
[34] PA 170
[35] PA-198

prioritization could be considered and applied, as Grantee systems can support, through ranking or priority levels like the following:

- First Priority: Acute crisis - Those shut off, without combustible fuel sources, or below 20% of fuel in a tank (requires safety inspection)
- Second Priority: Moderate crisis - Those with shut-off date or below 30% of fuel in a tank
- Third Priority: Mild crisis - Those past due without a shut-off notice
- Fourth Priority: Energy insecure - Not past due with vulnerable household members
- Fifth Priority: Energy insecure - Not past due without vulnerable household members

4.7 Re-establishing Eligibility for Additional Assistance

If an applicant reapplies for energy assistance during the grant year, some forms of eligibility determination may suffice for the full term of the grant year, and other forms must be re-verified.

Eligibility verification for households enrolled in home energy supplier affordable payment plans is valid for the term of the program while the customer maintains timely payments.

SER eligibility determinations for energy services can be used as categorical eligibility for the fiscal/program year. SSI, SDA, and HHC eligibility determinations will also remain valid for the full grant year.

- In seeking additional assistance, applicants are required to self-attest to the accuracy of all information on file. Eligibility may have to be re-verified if applicant attests that changes to household income, household members, or service address have occurred since the last application.

For Food Assistance Program (SNAP/FAP), Family Independent Program (TANF/FIP), Women Infants and Children (WIC), and Head Start, current participation should be verified.

MEAP applicants are encouraged to complete one or more self-sufficiency services appropriate to the applicant's household prior to receiving additional assistance.

4.8 The Applicant File

The Grantee must maintain a file for each household receiving MEAP funds. At a minimum, the file must include documents used to verify eligibility including the MEAP Application, eligibility verification, documentation of financial assistance, documentation of self-sufficiency services, documentation of previous services within the grant year, and any checklists or other documentation used by the

Grantee to ensure that all required applicant information is gathered, documented, and retained in the household's file

4.8.1 The Application

The MEAP Application must include:

- Full name and birthdate of the applicant and all members of the household
- MDHHS Case Number or alternate applicant identification number as applicable
- Household and contact information
- Service address of the primary residence, City, Zip Code, and County
- Both heating and electric provider information (Reminder: customers of opt-out electric utilities are not eligible for MEAP.)
- Categorical eligibility information, if applicable
- Income and deductible expenses if not categorically eligible
- Signatures of the applicant and of the agency representative processing the application. Applicant signatures may also be provided electronically or obtained via verbal consent.
- The grantee must verify and document need for crisis assistance per the MEAA and/or need for energy security assistance based on the energy burden thresholds in the MEAP credit calculator.

4.8.2 Eligibility Verification

Documents that verify eligibility for energy services and the household's percentage of State Median Income must be retained in the household's file. Documents may be originals or copies of the original document. Facsimiles are acceptable documents.

- Acceptable proof of SER eligibility includes DHS-1419 SER Decision Notice, Navigator screen print of SER eligibility, or documentation of collateral contact with MDHHS which must include date, signature of the agency representative, along with the name of the MDHHS staff person who provided the information or email communication between MEAP grantee and MDHHS. Additionally, a note indicating the week that the SER data file was accessed on Salesforce will be acceptable.
- The "Dates Covered" must include a starting date equal to October 1st of the new program year or later. Households applying in September with an October eligibility period will be considered eligible during their 30-day eligibility window.

Eligibility Documentation for Categorically Eligible Sources

The numbered items below indicate the eligibility documentation that will be accepted for categorically eligible programs.

1) Approval of LIHEAP State Emergency Relief (SER) Income Eligible at 150% FPL or less for any energy commodity may be used to verify eligibility even if not necessarily fulfilled or received.
    - Documentation includes: MDHHS SER data share through Salesforce, MI Bridges navigation, applicant supplied screen shot from MI Bridges, or applicant supplied determination letter.

2) LIHEAP Home Heating Credit (HHC) with an income eligibility threshold of 110%FPL and approved for tax years 2025 or 2026.
    - Documentation includes: HHC Payment posted to a customer account verified through the energy provider's portal, applicant-supplied check stub or payment documents, or applicant-supplied screenshot of the status of their HHC application on Treasury site.

The following categorically eligible income sources for Home Energy Security and additional sources for crisis assistance may be documented through an applicant supplied determination letter and several may also be verified through MI Bridges navigation or a screen shot from MI Bridges. WIC, HEADSTART & SSI are not available on MI Bridges for verification. Self-attestation can be utilized as a last resort.

3) Current Temporary Aid for Families (TANF) Recipient

4) Current Women, Infants, Children (WIC) Recipient which has an income eligibility threshold of 185%FPL

5) Head Start Participant Which has an income eligibility threshold of 130% FPL

These additional categorical eligibility sources may be used for crisis assistance:

6) Current Supplemental Nutrition Assistance Program (SNAP) Recipient which has an income eligibility threshold of 200% FPL.

7) State Disability Assistance (SDA) Recipient

8) Supplemental Security Income (SSI) Recipient

4.8.3 Documentation of Financial Assistance

To document financial assistance that is provided for energy needs, include the energy type and dollar amount of assistance, and retain a copy of the utility bill or estimate for deliverable fuel (LP Gas/Propane, Fuel Oil, and Coal), wood or other non-traditional fuel. If the address on the utility bill is different than the address of the

applicant, an explanation must be included in the household file. If the name on the utility bill is different than the applicant's name, an explanation must be included in the file. Grantees are encouraged to assist the applicant in correcting or updating account information.

When assistance is provided for deliverable fuel, approval should be based on an estimate provided by the service provider, however, the Grantee must obtain a copy of the service invoice prior to issuing payment. The amount issued to the provider cannot exceed the estimated amount which was used for the eligibility determination. Retain a copy of the invoice which documents the amount of deliverable fuel provided and the amount of the deliverable fuel in the tank prior to delivery. If the fuel tank capacity was above 30% at the time of delivery, no MEAP payment should be made, except for customers participating in an approved pilot program.

4.8.4 Documentation of Self-Sufficiency Services

When providing self-sufficiency services, grantees should document services as LIHEAP Assurance 16 ("A16") if the customer has received SER or a Home Heating Credit. If a customer has not received SER or HHC, grantees should document services as MEAP-Energy Assistance Program Self-sufficiency ("EAP SS") activities. Documentation must be clearly recorded in the applicant's file, may or may not be recorded on the Energy Security Plan form, and will include:

- The name of the utility account holder
- The date of application receipt
- Indication of whether service is provided under "EAP SS" or "A16"
- MDHHS Case Number or alternate applicant identification number
- Signatures or documented verbal consent of the applicant and of the agency representative acknowledging the provision of relational self-sufficiency services
- Which self-sufficiency/energy security services were provided as outlined in the Guidelines on the Provision of Self-Sufficiency Services, Section 5.0
- The documents must contain a date on which the activity occurred, what the activity included, and documentation of that activity on paper or in an electronic household file.

4.8.5 Comprehensive Documentation of Services

Document information for all services during the program year including the date, assistance amount, A16 activities, home energy supplier, and MEAP grantee that provided the assistance. Grantee is responsible for monitoring MEAP assistance levels within cap amounts, including assistance that may have been provided by another Grantee. See Appendix 4-B and Appendix 4-G for key auditing compliance checklists.

List of Appendices Related to Section 4

Appendix 4-A MEAP Application

Appendix 4-B MEAP Application File Sampling Checklist

Appendix 4-C Sample Income Calculation Worksheet

Appendix 4-D Determination Notice (To be provided at a later date)

Appendix 4-E Missing Documents Letter (To be provided at a later date)

Appendix 4-G MEAP Energy Security Plan File Sampling Checklist

Appendix 4-F Appeal Form, Request for Review
(To be provided at a later date)

Section 5.0 Guidelines on the Provision of Self-Sufficiency Services

Since Public Act 615 of 2012[136], the Michigan Energy Assistance Act (MEAA), created the Michigan Energy Assistance Program (MEAP)[237] it has permitted the Michigan Department of Health and Human Services (department), in consultation with the Michigan Public Service Commission (commission) to contract with public or private entities to provide energy assistance. In doing so, the legislature required the department to include clear performance metrics in any contract with any contracting entity. The MEAA also required services that will enable participants to become or move toward becoming self-sufficient.

Public Act 170 of 2024 in Sec. 5. (4) amended the MEAA, requiring that by October 1, 2025, the department, in consultation with the commission, provide guidelines on the provision of self- sufficiency services. Beginning with the program year that begins on October 1, 2026 (FY 2027), the guidelines must be incorporated into the performance metrics developed under subsection (2).

This Section fulfills this requirement by providing guidelines for service providers contracting under the MEAP regarding the requirements to provide self-sufficiency services.

5.1 Promoting Self-Sufficiency and Energy Security

In 2021, Self-sufficiency was defined in a subcommittee of the MEAP Workgroup as:

"A household's basic needs are being met while minimizing reliance on public assistance."

This definition is aligned with the Low-Income Home Energy Assistance Program (LIHEAP) Assurance 16 which gives the option for states to provide:

"...services that encourage and enable households to reduce their home energy needs and thereby the need for energy assistance."[438]

The MEAP encourages self-sufficiency through building financial management skills and by reducing the energy required to meet household needs via optimizing energy usage through energy conservation and the reduction of energy waste. The program includes relationally based education and skill-building services which can promote participant budgeting success and increased knowledge in relation to energy conservation. The provision of weatherization resources and referrals for weatherization services can enable households to reduce their energy consumption by preventing energy from being lost through inefficient housing.

[36] MCL - Act 615 of 2012 - Michigan Legislature
[37] Michigan Energy Assistance Program
[38] LIHEAP Assurances | The LIHEAP Clearinghouse

The Energy Affordability and Accessibility Collaborative (EAAC), an initiative of the commission, in its Definitions Subcommittee drafted a definition of home energy security in 2024 as follows:

"Home Energy Security is the reliable access to and availability of energy for meeting diverse and varied household needs. Home energy security is driven by several factors including but not limited to energy infrastructure, energy efficiency of housing stock, predictability and fairness of charges, and energy affordability. It can be improved through measures to address system reliability, home weatherization, energy education, consumer protection plans, and affordability strategies."

The MEAP encourages home energy security through a strategic framework which includes support for energy expenses through bill payment assistance and the offer of predictable payment patterns through budget-based "Affordable Payment Plans (APPs)." Affordability strategies can include reducing household expenses through financial management strategies, reducing energy expenses through energy conservation techniques and home remediation, and can include payment subsidy plans. By promoting energy security for households and coordinating services to address energy inefficiencies in the home, health and safety risks can be mediated.

Together these self-sufficiency and energy security services promote the applicant's short-term goal achievement and on-going household success.

5.2 Requirements of MEAP Providers

For the purposes of the MEAP, the term "self-sufficiency services" will refer to services that assist income-eligible low-income households in becoming or moving toward becoming self-sufficient and/or reducing energy insecurity for households applying for assistance from the MEAP.

In its review of the MEAA, the Michigan legislature in Public Act198 of 2024[39] further amended the MEAA in Sec. 3 (3) as follows:

> *Energy assistance must prioritize vulnerable populations and, as appropriate for the household, include services that will enable participants to become or move toward becoming self-sufficient. Services that assist participants in becoming self-sufficient include, but are not limited to, providing assistance to help participants in paying their energy bills on time, assisting participants in budgeting for and contributing to their ability to provide for energy expenses, and referral to weatherization or energy waste reduction programs and services. By October 1, 2014, each entity that carries out a contract with the department under this section shall provide or coordinate these services. The department shall attempt to coordinate its efforts with the efforts of other state departments or agencies to assist low-income households in becoming or moving toward becoming self-sufficient and reducing energy insecurity.*

[39] 2024-PA-0198.pdf

A primary consideration is to provide referrals *"as appropriate"* for the customer. The program is required to offer self-sufficiency services, but to be considerate of what is appropriate, a grantee is neither required nor prohibited from providing self-sufficiency services to each applicant. The services provided should be appropriate to the customer's household.

A second consideration is to report on measures in a way that will provide a consistent measurement of services across Grantees.

5.2.1 Michigan Energy Assistance Act (MEAA) Required Services

As outlined in the MEAA, the MEAP requires services appropriate for the household that will enable participants to become or move toward becoming self-sufficient. Specific MEAA examples are:

1) Providing assistance to help participants in paying their energy bills on time,
2) Assisting participants in budgeting for and contributing to their ability to provide for energy expenses, and
3) Referral to weatherization or energy waste reduction programs and services.

5.2.2 LIHEAP Assurance 16 Services

In Michigan, MDHHS oversees the federal Low-Income Home Energy Assistance Program (LIHEAP) funds. Under LIHEAP, a provision called Assurance 16 is an option that allows state and tribal grantees to use up to five percent of their block grant "to provide services that encourage and enable households to reduce their home energy needs and thereby the need for energy assistance, including needs assessment/referral, counseling, and assistance with energy vendors, and report to the Secretary concerning the impact of such activities on the number of households served, the level of direct benefits provided to those households, and the number of households that remain unserved."[40]

MDHHS has elected to budget an allowable amount of LIHEAP funding for Assurance 16 activities to be paired with and provided through the MEAP. The pairing of these services supports serving low-income households in becoming or moving toward becoming self-sufficient and reducing energy insecurity as required by the MEAP. The pairing also encourages and enables households to reduce their home energy needs and thereby the need for energy assistance as supported by the LIHEAP.

5.2.3 Self-Sufficiency Services Provided through MEAP

The self-sufficiency services provided under the MEAP include the following services, and services required by MEAP providers are outlined here:

- Energy Security Planning
- Needs Assessment/Referral*

[40] LIHEAP Assurances | The LIHEAP Clearinghouse

- Vendor Advocacy*
  - Type 1: Vendor advocacy not related to Affordable Payment Plans
  - Type 2: New Affordable Payment Plan enrollment
  - Type 3: Affordable Payment Plan reverification ✚
- Budgeting services*
  - Type 1: Financial discussion
  - Type 2: Budget review
  - Type 3: Budget counseling
- Energy conservation services*
  - Type 1: Energy savings discussion
  - Type 2: Conservation resources provision ✚
  - Type 3: Energy education course ✚
  - Type 4: Weatherization referral
- Short-term case management*
- Longer term case management* ✚

*These services are eligible for federal LIHEAP funding if the applicant has received SER in the current program year.
✚These services are optional for the grantee organization.

Although it is a goal for MEAP applicants to receive more in-depth services that are responsive to both household needs and legislative intent, it is not anticipated that every applicant household will receive these relationally based services through MEAP.

5.3 Foundational Services

Services that support the MEAP goals of helping low-income households in moving toward becoming self-sufficient, reducing energy insecurity, and in encouraging and enabling households to reduce their home energy needs begin with a relationship between the MEAP provider and the applicant. Helping relationships are processes that underpin each stage of a change process.[41] Three of these services, energy security planning, needs assessment/referral and vendor advocacy, are foundational services for building trust and understanding the needs of the applicant.

Building a trusting relationship with the applicant provides a platform for understanding what services may be most appropriate for the applicant's household. Resolving the energy crisis through energy security planning builds trust, reduces stress, and creates an opening to assess contributing factors to energy insecurity and to identify and address the applicant's needs.

Establishing rapport by advocating for the household with their energy vendor also opens the door to the provision of other services.

[41] Prochaska, J.O., & Norcross, J.C. (2014). Changing for Good: A Revolutionary Six-Stage Program for Overcoming Bad Habits and Moving Your Life Positively Forward.

While energy security planning and needs assessment/referral are expected as a foundation for education and skill building services, vendor advocacy will only be expected as appropriate or where necessary. MEAP providers are required to offer all three of these services to applicants, though applicant households may elect not to pursue one or all such offerings.

5.3.1 Energy Security Planning

"Energy Security Planning" means creating a plan together with a MEAP applicant toward a goal of improving self- sufficiency or enhancing energy security. Energy Security Planning does not include working with the applicant to complete an application for energy assistance nor a determination of the amount of energy assistance benefits.[42] Energy security planning services are part of the MEAP program objectives and the required offering of MEAP providers. Energy security planning is expected as a foundation for education and skill building services. Development of an energy security plan is required as evidence of case management, and energy security planning is part of program performance metrics.

The Energy Security Plan form is available to document the relationally based services that are part of an appropriate energy security plan for the applicant household (Appendix 5-A). The plan should be based on an assessment of the applicant's needs. An assessment, utilizing a common needs assessment/referral tool (Appendix 5-B) that aligns customer need with the services provided, may be counted as an additional MEAP Self-Sufficiency service. Whether utilizing the Energy Security Plan form to ensure required data elements are captured or providing required documentation within the applicant record, the plan documentation must be clearly recorded in the applicant's file and will include:

- The name of the utility account holder
- The date of application receipt
- Indication of whether service is provided under "EAP SS" or "A16"
- MDHHS Case Number or alternate applicant identification number
- Signatures or documented verbal consent of the applicant and of the agency representative acknowledging the provision of relational self-sufficiency services
- Which self-sufficiency/energy security services were provided as outlined in the Guidelines on the Provision of Self-Sufficiency Services, Section 5.0
- The documents must contain a date on which the activity occurred, what the activity included, and documentation of that activity on paper or in an electronic household file.

5.3.2 Needs Assessment/Referral Service

To be counted as a MEAP service, "Needs Assessment/Referral Service" (NARS) means utilizing a common set of questions provided in the MEAP Manual in a relational format together with the applicant (be it in a virtual meeting, in-person, or by phone) to assess the needs of applicants and tailor services and/or referrals based

[42] Carroll, David, APPRISE (2017). Understanding LIHEAP Assurance 16.

on needs identified in the assessment. See Appendix 5-B for the Needs Assessment Tool.

All seven of the needs assessment questions should have a documented response. Acceptable responses could include "N/A" for questions that do not apply, for example asking about childcare for a household without children, or "refused" for questions a participant is not comfortable answering.

The assessment of need, referrals made, and notations of known outcomes of referrals are to be documented in the case file. Referrals may be internal for services provided by the MEAP provider and/or external with referral to other service providers based on the household's unique needs. Outcomes are to be documented if and when they are known.

5.3.3 Vendor Advocacy

"Vendor Advocacy" means going beyond identifying account numbers, determining the balance owed, and making a payment commitment on an account. Vendor advocacy includes helping the applicant to communicate effectively with the vendor and facilitating details for maintaining service. This can include support needed for HESA bill payment assistance and always applies when helping the applicant to enroll in a home energy supplier affordable payment plan. Vendor advocacy does not include working with an applicant to complete an application, and in many cases will not be necessary.[43] There are three distinct types of vendor advocacy identified for the MEAP. These include:

Type 1: "Vendor Advocacy – non-APP" means helping the applicant to communicate effectively with the vendor and facilitating details for maintaining service. This applies for both crisis assistance and HESA bill payment assistance to reduce energy insecurity.

Type 2: "New APP enrollment" means enrolling a customer in an APP for the first time.

Type 3: "APP reverification" means re-establishing income eligibility to retain APP enrollment.

Vendor Advocacy is evidenced by email communication, documentation of phone calls with the vendor, an APP approval letter, and/or the completion of an APP Proof of Enrollment Form or HESA Benefit Calculation.

5.4 Education and Skill-building Services

Once rapport has been established, household needs are more clearly understood, and energy crises are in the process of resolution, then additional services may be offered in support of program goals. At this point, the applicant may be more open to receiving the support offered.

[43] See examples in Section 5.6

Education and skill-building services can come in varying forms. They may include brief conversational interventions that provide tips, explore resources, and respond to questions or concerns in a conversational fashion. We refer to these brief interventions as a "financial discussion" or an "energy savings discussion." Skill building can also be enhanced through modelling. An example of this is a review of the household budget. Some applicants have never looked at their income and expenses in black and white on a budget form. The process of modelling the detailing of income and expenses in a budget tool can be eye-opening for some and can help to build additional motivation and skills.

Providing supplies for insulating a home or coordinating referrals to address leaky house issues can empower customers to conserve energy and resultant energy expenses. Other more involved approaches to education and skill building may include one-on-one coaching sessions for budget counseling and/or energy conservation or a group course to provide information and enhance skills. Whichever approach is used to achieve program goals, the relationship between the assistance worker and the applicant is key.

All MEAP providers are expected to, at minimum, offer Type 1 and Type 2 Budgeting Services and Type 1 and Type 4 Energy Conservation Services as described below. An array of examples is also provided for reference in Section 5.6.

5.4.1 Budgeting Services

"Budgeting services" means to provide financial coaching, financial literacy education, and/or financial management training based on the needs assessment / referral service. the goal is to assist a household in budgeting for their energy expenses and paying energy bills on time, as well as contributing to their overall ability to provide for in-home energy expenses long-term. There are three distinct types of budgeting services identified for the MEAP:

Type 1: "Financial discussion" means a discussion in person, by phone or in a virtual meeting walking through income and expense strategies with the applicant and documenting the strategies in a case note.[44]

Type 2: "Budget review" means assisting an applicant with completing a budget form including their monthly income and expenses or reviewing the applicant's independently completed budget with them and coaching them on how they may increase income or reduce expenses. This service is evidenced by a copy of the budget form in the case file that has been signed by the applicant.

Type 3: "Budget counseling" means spending at least a total of 90 minutes meeting with an applicant individually or in a group class setting throughout one or more meetings with the specific purpose of providing coaching and advice on household budget management. This service will be evidenced in one of three ways, 1) by case notes in the applicant's file, 2) participant virtual attendance logs or 3) sign-in sheets for in-person group sessions.

[44] See examples in Section 5.6.2

5.4.2 Energy Conservation Services

"Energy conservation services" means assisting an applicant, based on the needs assessment / referral service, to develop a better understanding of their energy bill, identify strategies to mitigate their usage thereby managing their energy expenses, and connecting households with weatherization and/or pre-weatherization services. There are four distinct types of energy education services:

Type 1: "Energy savings discussion" means a discussion in person, by phone, in a virtual meeting, or through approved digital learning formats, i.e., interactive videos with comprehension checks and follow-up discussion to ensure understanding. The discussion will include providing tips on varied ways to conserve energy or demonstrating paper or on-line resource tools. These discussions may take place at any time during the assistance process including during a needs assessment / referral service or budget review. The discussion date and content covered are to be documented in a case note.[45]

Type 2: "Conservation resources" means providing the applicant with material energy conservation resources such as weather-stripping, low-energy use lights bulbs, outlet covers, etc. as documented in the case file.[46]

Type 3: "Energy education course" means spending at least a total of 90 minutes meeting with an applicant individually or in a group class setting throughout one or more meetings with the specific purpose of providing coaching and advice on energy conservation. This service will be evidenced in one of three ways, 1) by case notes in the applicant's file, 2) participant virtual attendance logs or 3) sign-in sheets for in-person group sessions.

If a grantee utilizes a video component as part of the 90-minute energy education, the applicant must: a) fully engage with the content, b) the grantee must verify completion, and c) the grantee must discuss the material to ensure understanding.

Type 4: "Weatherization referral" means an internal or external referral to a weatherization, pre-weatherization, or energy waste reduction services home energy supplier program contact where it is known that the connection between the program and the applicant occurred. This referral and the connection between the customer and weatherization service provider confirming that communication or an appointment has been established can be evidenced in a variety of ways including notation in case notes that a connection has been confirmed via communication with the applicant or the weatherization provider, email communication, or appointment confirmation screen shots in the case file. MEAP providers may broadly provide more generic referrals by offering contact information for weatherization service providers; however, this service is to be counted only when it can be demonstrated that the applicant and the weatherization service provider established a connection.

[45] See examples in Section 5.6.3
[46] See examples in Section 5.6.4

Goals for “weatherization referrals” are to have a consistent measure for reporting services and to identify opportunities for improving the connection between energy assistance and weatherization services. For example, if each household receives a piece of jewelry, something of value, but for some households that jewelry is an expensive diamond ring, if all the household who have received jewelry are counted, but households who have received diamond rings are included in the count, it will not be known how many of the households receiving jewelry received diamond rings. Similarly, if all households who are provided a phone number to a weatherization provider are counted and some households have their needs further assessed and possibly, in time, met by connecting them directly with a weatherization provider, it the number of households who were given a phone number will only be known, but not how many made a connection. Therefore, the method is to count the object of our goal, households receiving “diamond rings,” the customers who connect with weatherization providers to have their needs appropriately met.

5.4.3 Short Term Case Management

“Short term case management” means providing information and sharing materials about services available to MEAP applicants, developing an understanding of an applicant’s needs and offering guidance during the MEAP relationship. Short-term case management is evidenced, at minimum, by the provision of each of the following services and may include additional services:

- Needs Assessment/Referral Service (NARS)
- Development of an Energy Security Plan

All MEAP providers are expected to offer the opportunity for Short Term Case Management as part of MEAP self-sufficiency services.

5.4.4 Longer Term Case Management

While Long-term Case Management is valued as a tool to enhance self-sufficiency and home energy security, it is not an expectation that each MEAP provider will offer this service.

“Longer term case management” means providing short term case management and additionally working with participants over the course of two or more meetings to accomplish any of the following services:

- Budget counseling
- Energy education
- Meeting for APP monitoring and support
- Support with goals toward becoming self-sufficient

5.5 Reporting of Self-Sufficiency Services

Public Act 170 of 2024 requires the inclusion of clear performance metrics for contracted agencies providing MEAP assistance. Beginning with the program year that begins on October 1, 2026, guidelines on the provision of self-sufficiency services

must be incorporated into the performance metrics. These guidelines outline definitions and examples of various self-sufficiency services required or supported by the MEAP to support self-sufficiency and the reduction of energy insecurity.

The measures defined in this section are detailed to provide consistency in measuring the services being reported so that services reported under one category by grantee A are comparable to the services provided under the same category by grantee B. Without consistent measures, evaluation of performance metrics would be unworkable.

5.5.1 LIHEAP Assurance 16 or MEAP Energy Assistance Program

Self-sufficiency services under the MEAP may be funded and reported in two ways: 1) the LEAF funded Energy Assistance Program (EAP) costs, and 2) through federal LIHEAP funded Assurance 16 (A16) grant allocations. The determination of whether a particular self-sufficiency service is to be reported as EAP and accounted for on the State Financial Status Report (FSR) form C-108 or as A16 and accounted for on the federal FSR is dependent on whether the energy customer being served was approved for SER within the current grant year. If a customer was approved for SER within the current grant year, the self-sufficiency service they received is to be counted as A16, if the customer has not been approved for SER in the current year, the service provided the customer is to be counted as EAP.

When self-sufficiency services are provided for an applicant whose MEAP eligibility is unverified, the grantee should not report these services on the client list until MEAP eligibility is verified. Self-sufficiency services provided to applicants with unverified income must not be billed on the FSR for federal funding. This applies regardless of whether the grantee bills by time or piece-rate. Billing for federal funding can only occur once income has been verified and the household is deemed eligible under federal LIHEAP requirements.

Additional detail on reporting processes can be found in Section 8.0 of this program manual.

5.6 Examples of Self-Sufficiency Services

Following are a variety of examples of self-sufficiency services through the MEAP. These examples illustrate but are not all-inclusive of the means by which MEAP self-sufficiency services may be applied.

5.6.1 Examples of Vendor Advocacy - Type 1

Vendor Advocacy services other than APP or HESA enrollment or reverification may include activities like the following:

- Assisting a customer to transfer an account into their own name instead of the name of a person no longer in the household or of a minor child.
- Coordinating with a deliverable fuel vendor regarding fuel levels and delivery information.
- Researching pricing for combustible fuel purchases such as cord wood or pellets.

- Communicating with a metered vendor to sort out confusing or complicated billing details.

5.6.2 Examples of Financial Discussion

A "resource budgeting" discussion would be a common example. For instance, "I notice you're struggling with expenses month to month. Sometimes the use of food pantry assistance can reduce grocery bills and free up funds to do things like put gas in your car so you can continue to work."

Another example could include a conversation about not making ends meet and providing a referral to Michigan Works for assistance with seeking better employment.

5.6.3 Examples of Energy Savings Discussion

There is a myriad of energy saving tips that are available for a low-income applicant to deploy. Here are just a few suggestions that could be woven into a conversation:

- Suggest adjusting the thermostat during the day when no one is home.
- Suggest turning off lights and appliances when not in use.
- Suggest using dishwashers and clothes washers/dryers at night to keep the home cooler during the day.
- Suggest replacing furnace filters regularly to ensure the furnace runs efficiently.
- Educate on how to understand the energy bill.

5.6.4 Examples of Conservation Resources Provision

Energy efficiency resources or kits may include materials like LED lightbulbs, LED night-lights, a furnace filter whistle, weather-stripping, a low-flow shower head and other components.

5.6.5 Examples of Weatherization Referral

"Energy waste reduction services" (sometimes called energy optimization or, more generically, weatherization) means energy conservation or energy efficiency services that are demonstrated to produce measurable savings to help a household to achieve a greater degree of energy self- sufficiency. These services are typically funded through energy companies who utilize contractors to perform the work.

"Weatherization" means a program supported by funds provided by the U.S. Department of Energy Weatherization Assistance Program (WAP) and/or LIHEAP funds to provide low cost and cost- effective energy related home repairs. In Michigan, these programs are provided by Community Action Agencies (CAAs) and coordinated through the department's Bureau of Community Action and Economic Opportunity (BCAEO). These weatherization programs have the following goals:

WAP: to increase the energy efficiency of dwellings owned or occupied by low-income persons, reduce their total residential energy expenditures, and improve the health and safety, especially low-income persons who are particularly vulnerable such as elderly, the handicapped, and children.

LIHEAP: provide low-cost residential weatherization and other cost-effective energy-related home repairs.

Below are examples of case notes that would demonstrate that a connection between the applicant and the weatherization provider was made:

- 11.24.2026 – (Worker) talked to (applicant) on the phone and gave her the phone number to (provider) for weatherization services.
  12.07.2026 – (Provider) confirmed working with (applicant) on their monthly service list.

- 11.24.2026 – (Worker) talked to (applicant) on the phone and gave her the phone number to (provider) for weatherization services.
  12.07.2026 – (Applicant) called back, reported receiving additional information (or services) from (provider), and thanked this worker for the referral.

- 11.24.2026 – (Worker) talked to (applicant) on the phone and gave her the phone number to (provider) for weatherization services.
  12.07.2026 - (Worker) followed up with (provider) who reported talking with the applicant, but services are not being pursued.

- 11.24.2026 – (Worker) emailed (applicant) the contact information for (provider) in Scottville for the home weatherization program and copied the program contact. (Name) responded to (applicant) via email and (applicant) replied to the email, thus confirming a connection was made.

- 11.24.2026 – (Worker) emailed (applicant) the contact information for (provider) in (area) for the home weatherization program and copied the program contact.
  12.07.2026 (Worker) emailed (name) at (provider) who confirmed working with this applicant.

5.6.6 Examples of Case Management Services

Short-term case management: An example of short-term case management would include meeting with an applicant at least once in person, by phone or in a virtual meeting. During the meeting the service provider would establish rapport with the applicant, explore and assess the needs of the applicant, and tailor services and/or referrals based on needs identified in the assessment. Additional services may include other MEAP self-sufficiency services, APP enrollment, and/or services and referrals outside of the MEAP program.

Documentation of service: MEAP services will be adequately documented in the applicant file, and the Energy Security Plan is supported for use in collaboration with the applicant. While the service provider will provide a written or electronic signature, the applicant may provide verbal consent, or a written or electronic

signature to signify agreement with the services that were provided during the meeting and/or further services recommended in the plan.

Long-term case management: Once a second meeting with the participant occurs to accomplish any of the following services, the service is then categorized as long-term case management instead of short-term case management:

- Budget counseling
- Energy education
- Meeting for APP monitoring and support
- Support with goals toward becoming self-sufficient

List of Appendices Related to Section 5

Appendix 5-A Energy Security Plan form

Appendix 5-B Needs Assessment Tool

Section 6.0 Energy Security through Affordable Payment Plans

Affordable Payment Plans were established and evolved through the MEAP. APPs are an effective means of reducing the number of Michigan households with unsustainable energy burdens. The plans promote personal responsibility and partnership with the customer's home energy supplier as well as regularity and greater predictability in payment behaviors. Enhancing home energy security for customers also provides a more stable basis for customers to strive for increased self-sufficiency. Utilities participating in or exploring the option of offering an APP may acquire program guidance in this section.

6.1 Home Energy Supplier APP Participation Parameters

In order to participate as a home energy supplier offering a MEAP Affordable Payment Plan (APP) to support Home Energy Security for its customers, a home energy supplier must comply with the following:

1) Offer monthly budget plan to its customers.

2) Utilize a benefit matrix as outlined in this manual.

3) Adhere to a communication plan.

4) Coordinate with MEAP Grantees as the authorized enrollment agencies.

5) Offer participation only to those customers whose electric utility participates in the LIHEAP funding factor.

6) Participate in quarterly (or as scheduled) meetings with MPSC and other APP utilities.

6.2 Establishing an Affordable Payment Plan

Home energy suppliers interested in establishing an affordable payment plan through MEAP are invited to target implementation for the first quarter of a program year and follow the series of steps outlined here in preparation for implementation:

1) Confirmation of Interest: To establish an APP the home energy supplier would formally confirm its interest in participating as a MEAP APP utility partner. Within three days, the MPSC confirms receipt and shares review timeline/process, including proposed dates for the MEAP Program Orientation.

2) MEAP Program Orientation & Home Energy Supplier Feedback: MPSC staff provide the home energy supplier with an overview of the MEAP program, including:
   a. Program goals,
   b. Statutory requirements,
   c. Compliance and reporting expectations,
   d. The role of APPs within the program,
   e. The home energy supplier also provides an overview of their current programs and the company's goals related to support for income-qualified customers. and the population and geographic service area the home energy supplier intends to serve through the APP.

3) Operational and Systems Discussion: MPSC staff will lay out APP Design Requirements, eligibility criteria, and payment structures. The home energy supplier will provide information on the operational logistics that will support the program, including billing systems, data management, and how customer information will be shared with MEAP partners.

4) Submission of APP Program Package: The home energy supplier is then provided guidance for the submission of a formal program design package outlining the APP structure, operational processes, and required documentation (e.g., default processes, customer communications, and program policies).

5) Staff Review and Evaluation: MPSC staff will review the home energy supplier's submission using a standardized evaluation framework to determine whether the proposed program meets MEAP standards and demonstrates readiness for implementation. MPSC and the home energy supplier engage in dialogue on the submitted materials.

6) Participation Agreement: If approved, the MEAP Grantee and the home energy supplier will execute an APP Participation Agreement outlining program roles, responsibilities, and reporting expectations.

7) Stakeholder Communication and Coordination: Once approved, the home energy supplier will coordinate with MEAP grantees within their service area to communicate participation and establish referral processes.

6.3 Home Energy Supplier and Grantee APP Coordination

It is essential that energy suppliers and grantees serving customers in the energy supplier's service territory coordinate effectively to serve MEAP customers. Coordination is required from initial outreach to program reporting.

6.3.1 APP Outreach

Energy providers and grantees coordinate clear and consistent messaging to engage customers in APPS. Outreach may be conducted through a variety of methods that can include:

- Webpage advertising by the energy company and/or grantee
- Bill inserts
- Michigan 211
- Word of mouth
- Grantee promotion to customers facing energy crisis
- Engaging local media
- Assistance fairs or similar events

6.3.2 APP Projections

Energy providers provide crucial data for projecting the cost of APP enrollments. Grantees then utilize these projections in their grant budgets to project service to customers. Coordinating to determine the funding levels required to serve customers at various income thresholds and differing usage patterns is a necessary function of offering an APP.

6.3.3 APP Payments

Energy providers are responsible for providing monthly invoices to grantees to cover APP account subsidies. Working together to ensure appropriate contacts as well as accurate and efficient processes can smooth payment processing.

6.3.4 APP Reporting

Grantees and energy providers work together to ensure accurate reporting on APP program metrics, ensuring compliance with MEAP program parameters.

6.4 MPSC Contract Guidance for APP Relationships

MEAP grantees are expected to place contractual requirements on home energy suppliers that provide the APP option, aligned with state requirements. The state requirements provide consistent foundations and program design elements across participating utilities, ensure that MEAP funds are used only for authorized purposes, and undergird the achievement of program goals.

Fully executed contract agreements must be in place by the start of the program year (October 1) when possible, but no later than December 1 of the program year. No APP invoices may be paid in the program year until an executed contract has been submitted to MPSC. MPSC and MDHHS must approve any programmatic stipulations not outlined in this manual prior to contract execution. The contract requires acceptance on or before October 1 of the program year, and both partners, the MEAP grantee and the home energy supplier, must have signatures from the authorized negotiators.

Agreements between home energy suppliers and MEAP grantees must include the following language/components to ensure program compliance and reporting requirements are met in alignment with the expectations set forth in legislation governing the LIEAF and the MEAP. (See Sections 1.1 and 1.2.)

6.4.1 APP Program model

Enrollments in APPs utilizing MEAP funds are required to follow the parameters of the aligned modified budget plan that has been approved by the MPSC. The aligned modified budget plan parameters are outlined below. Households enrolled in FY2025 or FY 2027 that have not defaulted from the program (or have not completed the 24-month term, as applicable) will be considered enrolled until their graduation or for their remaining months in FY 2027, whichever comes first. A household may continue enrollment in an APP after 24 months of participation provided income is re-verified.

Aligned Modified Budget Plan Parameters[47]

- Plan Term
  - APPs are not term-limited as long as a customer remains eligible to participate, which is determined through a revalidation process. APP revalidation periods vary based on household income status.
    - The standard revalidation cadence for households not on fixed incomes, who have employment or the opportunity or likelihood of employment income, may remain enrolled for two years with a full revalidation every two years.
    - The exception to this cadence is for households with fixed income in the form of regular, predictable payments such as retirement or disability income without household members who have income from employment. These households are subject to a full re-validation every four years. The assignment of a four-year APP revalidation period should be based on two criteria: 1) The household's current documented income source is considered stable and predictable, for example, SSI, RSDI, or stable retirement income, and 2) The household consists only of senior and/or disabled group members and/or children who will not reach age 18 within the next two years.
    - Household eligibility must be re-verified if a change in the household is reported each time energy assistance is requested. Household changes include but are not limited to the following: change of address, income, or household composition or no longer categorically eligible.
    - To determine whether a household would qualify for the exception of a four-year validation cadence, consider the following:

[47] APP participants enrolled in the 2025 or 2026 program year may continue on their current plan until they graduate or until the close of the 2027 program year, whichever comes first.

    - Does the household have income? If zero income, the household would be revalidated every 2 years.
    - Is all household income acquired from fixed sources such as retirement income or disability income? If not, the household would be revalidated every 2 years.
    - Does the household contain any household members who would be eligible for work in the next two years? If the household contains members who would be eligible for work within the next 2 years, the household would be revalidated every 2 years.
    - If the household's income is acquired only from fixed sources such as retirement income or disability income and the household does not contain any household members who would be eligible for work in the next two years, the household would be put on a four-year validation cadence.
- Tiers by Monthly Income & Energy Burden
  - For Affordable Payment Plans serving electric and combined electric and natural gas customers (8 tiers)
    - Tier 1: $500 monthly income or less ($6,000 Annual)
    - Tier 2: $501-$1,000 monthly income ($12,000 Annual)
    - Tier 3: $1,001-$1,500 monthly income ($18,000 Annual)
    - Tier 4: $1,501-$2,000 monthly income ($24,000 Annual)
    - Tier 5: $2,001-$2,500 monthly income ($30,000 Annual)
    - Tier 6: $2,501-$3,500 monthly income ($42,000 Annual)
    - Tier 7: $3,501-$4,500 monthly income ($54,000 Annual)
    - Tier 8: $4,501 monthly income or more ($66,000 Annual)
  - For Affordable Payment Plans serving natural gas customers only (6 tiers)
    - Tier 1: $1,000 monthly income or less ($12,000 Annual)
    - Tier 2: $1,001-$1,500 monthly income ($18,000 Annual)
    - Tier 3: $1,501-$2,000 monthly income ($24,000 Annual)
    - Tier 4: $2,001-$2,500 monthly income ($30,000 Annual)
    - Tier 5: $2,501-$3,500 monthly income ($42,000 Annual)
    - Tier 6: $3,501 monthly income or more ($54,000 Annual)
- No Consumption Cap
- Arrears Forgiveness[48]
  - Initial arrears forgiveness payment up to $600. An additional $600 may be forgiven per year as necessary (See section 4.3.1 APP Arrears Forgiveness)
- Monthly Gap

[48] For customers enrolled in an APP prior to FY2027, a final arrears payment of up to $1800 may be applied at the conclusion of 2 years on the APP. Customers enrolled in an APP in FY2027 or going forward may receive up to $600 arrearage forgiveness upon enrollment and annually as needed for the duration of their participation.

  - A flat monthly credit is provided to subsidize the customer's plan amount to make it more affordable. This monthly credit is determined by using utility consumption data, utility bill data, and income and energy burden considerations.
- Plan Calculation
  - The customer's plan amount is based on their average monthly consumption and reduced by a monthly gap credit adjusted to the customer's income
  - The customer's plan amount is re-evaluated every 6 months and can change based on the customer's consumption behavior (See Section 4.3.1 APP Reconciliation and 6.5.2 APP Budget Review / Reconciliation)

6.4.2 APP Communication plan

Households who are approved for MEAP direct payment assistance must receive a written determination notice indicating approval. The notice should include any contributions the household must make. If the household is approved for a home energy supplier APP, the terms of the program including the customer's payment expectation, true-ups, disenrollment criteria, and the duration of enrollment must be provided along with the determination notice. Components of an APP communication plan are outlined in Section 6.4.2 of this manual.

6.4.3 Eligibility Verification and Enrollment in APPs

The Grantee will verify that customers are income eligible and will notify the home energy provider of enrollment when an APP is part of the household's Self-Sufficiency/Energy Security Plan. To be eligible for MEAP Assistance the household must be determined income eligible through participation in a categorically eligible program or by having their income verified by the grantee as at or below 60% of the state median income (SMI).

1) Applying for State Emergency Relief: Households are not required to apply for SER prior to applying for MEAP home energy security services. However, to assist with arrears resolution, potential APP customers at or below 150% FPL who present with an energy crisis may initially apply for the State Emergency Relief (SER) program.
   a. Applicants may either apply directly with Michigan Department of Health and Human Services (MDHHS) or be assisted by a MI Bridges Navigator/ MEAP Grantee. MDHHS will determine eligibility for SER. Households who qualify for an SER energy payment will be deemed categorically eligible for MEAP payment assistance, including enrollment in an APP with a participating home energy supplier.
   b. Once a household has been determined eligible by MDHHS for SER, the customer may seek or be referred to a MEAP grantee for additional help, including self-sufficiency services.
   c. Enrollment into an APP can be used to satisfy the household's SER shortfall and/or applicant contribution, per the Michigan State Emergency Relief

Manual ERM 208 (Budget Procedures Section) and ERM 301 (Energy Services Section). The Proof of Affordable Payment Plan Enrollment for SER Copay notice, Appendix 3-B, is to verify that the applicant's household is being enrolled in an Affordable Payment Plan (APP) and satisfies the SER copayment requirement.

2) Account eligibility: Only residential accounts are eligible for enrollment for their residential heating and/or electric costs.

3) Applicant/account alignment: If the name on the utility bill is different than the applicant's name, an explanation must be included in the applicant file as to why the responsible party listed on the utility bill is not the one applying for MEAP assistance. Grantees are encouraged to assist the applicant in correcting or updating account information.

4) Assistance amounts: Assistance benefit matrices are designed to move households towards an overall energy burden threshold of 6% of annual household income, 4% for electric service and 2% for home heating. Customers have a minimum payment of $10 per month, and a maximum credit allowance has been incorporated into the benefit calculator.

5) Customer payment obligations: Customer payments are calculated based on usage and income tiers and payment amounts could be changed after periodic budget plan review. Home energy supplier budget plans will be reviewed at six, twelve, and eighteen months and at least annually thereafter. Monthly payments are adjusted only for a minimum of plus or minus five dollars.

6) Consumption or arrears caps: To reduce barriers to home energy security, MEAP APPs have no consumption or arrears caps.

7) Reconciliation credit: At the completion of year one on the program, a reconciliation credit will be applied if the reconciliation amount is greater than zero. No reconciliation credit is applied after year two on the program. -

6.4.4 APP Payment application

Home energy suppliers must apply the approved MEAP APP benefit amount directly to the eligible customer account. On a monthly basis, will payments applied will have to be reconciled with the participant list.

6.4.5 Disenrolling APP customers

Home energy suppliers must disenroll any household who has missed the equivalent payment amount of an accumulated two monthly participant payments. These missed payments do not need to be consecutive.

- If a participant paid regularly then missed two consecutive monthly payments, the participant would be disenrolled.
- If a participant missed a payment, made regularly scheduled payments without addressing the missed payment then missed a second payment, the participant would be disenrolled.
- If a participant missed a payment, caught up on their payment plan obligations then missed another, the second missed payment would only count as one payment in arrears and the participant would remain enrolled.

When a customer is disenrolled, MEAP credits that were previously applied will remain on the customer's account and should not be reversed upon program default. At that point, the customer will be responsible for any remaining arrears balance and/or past due monthly payment plan obligations. A sample disenrollment communication is provided in Appendix 6-A.

In the 2027 program year the APP model is shifting to an energy burden-based benefit. This model may work better for smaller households with very low incomes. Higher income households with a lower energy burden may see a decrease in the benefit that will be allotted to them.

With the 2027 enrollments moving forward, customers will no longer graduate from an APP but will have their eligibility recertified and may continue on the APP. For an APP participant who concluded their APP prior to October first of this year, they may apply to enroll in an energy burden-based APP. For a roll-over APP customer, meaning they enrolled in the 2025 or 2026 program year, prior to October first of the 2027 program year but have not completed 24 months on the program, if they are at risk of default, a one-time APP subsidy payment, a direct payment assistance with getting caught up on an APP, may be used within the 2027 program year to prevent default. For example, a household enrolled in an APP in January 2026 and is still within the 24-month APP period during the 2027 program year. The household has fallen behind on APP payments and is at risk of default. This payment does not require an exception or prior approval.

For those enrolled October first, 2026, or later, if an applicant defaults on an APP in one year, they must wait until the next grant year to re-enroll. If they default, depending on their eligibility, they may still be eligible for crisis assistance which can help bridge the gap until they can re-enroll.

6.4.6 Program year funds must be applied within the program year

No payment using MEAP program-year funds will be made for any household's APP subsidy payments outside of the program year beginning October 1st.

6.4.7 APP Contract term

Language must be included to state that the contract will be in place until the next program year's contract is signed and fully executed.

Note: The MPSC and MDHHS reserve the right to review contracts to ensure compliance and intent of program and service delivery.

6.4.8 Energy Waste Reduction services for APP customers

Home energy suppliers must coordinate with grantees, whenever possible, the availability of home energy kits, home energy audits, and other energy waste reduction services.

6.4.9 APP Reporting

Consistent practices and standardized reports as outlined below, including invoices, must be provided to the grantees and include all data necessary for the Grantee to comply with Michigan Public Service Commission (MPSC) reporting requirements while implementing appropriate data privacy and cyber security measures. Home energy suppliers must report to grantees at agreed-upon time intervals when a customer has fallen off the plan, so that agencies may intervene with the household and provide additional services, and that reports are accurate

1) Projections: Home energy suppliers must report projections for costs of APP enrollment for the program year at least monthly, to grantees and MPSC staff and acknowledge that MEAP funds may not be available when actuals are higher than the initial projection. In the case that actual program costs are higher than projected, all parties should agree to recognize that the inability to provide a forecast or inaccuracies in forecasting due to matters outside of a party's control, for example, extreme weather, and/or force majeure events, may ultimately lead to actual usage being higher or lower than anticipated.

2) Mis-projections: In the event, that actuals come in higher or lower than forecasts due to matters outside a party's control both parties should agree to:
   a. Prioritize continued participation of currently enrolled households in the Affordable Payment Plan, whenever financial resources are available in the grantee's MEAP budget.
   b. Pause APP enrollment and explore solutions to allow households to remain active on the plan when grantees' MEAP budgets are forecasted to be depleted. Both grantee and provider should agree to present such solutions to MPSC/MDHHS for approval.
   c. If the grantee and provider cannot reach an agreement or solution to funding APP-enrolled households, then some households will be removed from the APP program or enrollment closed for the year. Given Public Act 169 of 2024, to the extent possible, agreements or solutions to funding APP-enrolled

households should draw funding from the geographic parameters of the home energy suppliers' service territories.

d. If agreement cannot be reached on a solution to fund APP-enrolled households, any additional costs caused by an under-projection of energy forecasts will not be borne by the MPSC or MDHHS.

3) Monthly reconciliation: A monthly reconciliation report must be provided with budget summaries of all direct assistance expenditures with source documentation. Accounts must be flagged when the account holder has moved and has a new account number so that the grantee is reporting the accurate account and address to the MPSC. All payment reconciliations must be completed and reconciled to ensure that the Grantee's Final FSR can be submitted by October 8th.

4) Payment receipts: Home energy suppliers must provide monthly reports and receipts to agencies for APP payments and arrearage payments that include:
   a. Total amount applied to customers' accounts during the reporting period.
   b. Customer names, account numbers, energy type, arrearage at time of enrollment, APP enrollment date, APP gap payment, APP arrearage payment, payment date, disenrollment date, disenrollment reason, 12-month energy usage (at time of enrollment), etc. A complete list of required fields will be provided by MPSC.
   c. Arrears Forgiveness: Affordable Payment Plans include an arrearage forgiveness component as detailed in section 4.3.1 of this manual. The grantee and the home energy supplier with coordinate application of the arrearage forgiveness to APP customer accounts.
   d. APP Plan Conclusion: A plan will be considered to have concluded if a customer voluntarily disenrolls, has a lapse in eligibility, or if the account closes for any reason including the customer moving out of the energy provider's service area. If a customer voluntarily disenrolls or has a lapse in eligibility, the customer will automatically be enrolled in a budget plan. A customer then has the option of disenrolling in the budget plan at any given time. Payments must not include late fees, unauthorized/illegal use, unregulated charges (e.g., Home Protection Plan, Appliance Service Plan) or any other disallowed costs as outlined in this manual.

5) Non-compliance: If the Home energy suppliers reporting requirements are not met, non-compliance must be remedied by the following methods:
   a. Disallowing all or part of the cost of the activity.
   b. Increased monitoring of the home energy supplier.
   c. A corrective action plan could include, among other actions, increased communication with the grantee or increased progress reporting.

d. Sub-recipient agreements will be suspended or terminated if corrective actions do not resolve the non-compliance.

6) Tracking system: Home energy suppliers and MEAP grantees must establish a tracking system to ensure timely reporting of payments:
   a. Grantees cannot include APP payments that have not been reconciled. on their monthly Financial Status Reports (FSR).
   b. The Grantee is responsible for correcting and resolving any overpayments or underpayments made in error to an energy provider or vendor on behalf of a low-income household regardless of when the error occurred or is discovered.
   c. MEAP payments that result in an account-credit are considered an overpayment and must be refunded by the provider. In the event of overpayment, it is the responsibility of the Grantee to determine the amount and request that the energy provider or vendor return any overpayment. The request for a refund must be in writing, including the mailing address for the return and identify the account that was incorrectly authorized or overpaid. Please allow the provider 14 days, from the date notified of the overpayment to refund the money.
      - The agency must provide the MPSC with supporting documentation that verifies all overpayment refunds received from energy providers and vendors. In instances where a provider fails to return funds or is not cooperative in returning funds, please notify MPSC. Exceptions to this apply when a household is enrolled in a MEAP-funded Affordable Payment Plan. If the household disenrolls in the APP and has an account credit as a result of MEAP payments. That is considered an overpayment, and the credit amount must be refunded by the provider.
        - As described in Section 8.1.3, Household Applicant File Sampling, the MPSC will review and perform an attribute-sampling of the applicant lists, and request that the Grantee provide applicant/household energy payment and self-sufficiency/A16 documentation collected during the reporting period. The MEAP grantee is expected to clearly note in the applicant file the reason for any credits on the billings statement.
        - Once APP payments are reconciled this amount must also be reconciled with the applicable participant list.

6.5 APP Participant Communications from the Home Energy Supplier

Households who are approved for MEAP direct payment assistance must receive a written determination notice indicating approval. The notice should include any contributions the household must make. If the household is approved for a home energy supplier APP, the terms of the program including the customer's payment expectation, true-ups, disenrollment criteria, and the duration of enrollment must be

provided along with the determination notice. Components of an APP communication plan are included as follows.

6.5.1 APP Enrollment

Upon enrollment, a new participant may expect to receive communication regarding these plan elements:

- Program Description
- Budget Review Process
- Impacts of Usage on future bills
- Plan Start/End Date
- Plan Amount
- Benefits
- Arrears forgiveness process

See Appendix 6-B for Sample Enrollment Communication

6.5.2 APP Budget Review / Reconciliation

When the customer's budget plan is reviewed at six or twelve months or following, communication will be sent to the customer detailing the following:

- The new plan amount or confirmation of the existing plan amount
- Details on how usage impacts their budget
- Energy Waste Reduction resource information
- If customer indicates they are no longer able to meet the payment obligation upon plan increase, the home energy supplier may refer the customer to the MEAP grantee for additional self-sufficiency services and/or service referrals.

See Appendix 4-C for a Sample Budget Review / Reconciliation Communication.

6.5.3 Revalidation Notice for APP Customers

When a customer is due for their income revalidation, communication will be sent to the customer detailing the following:

- A brief explanation of revalidation
- Information on how to revalidate
- The deadline for revalidation
- The consequences for failing to revalidate

A sample revalidation letter can be found in Appendix 6-D.

6.5.4 Past Due Notice for APP Customers

When a customer's account is in past due status due to late or incomplete payments, the following information will be provided to the customer:

- Customer information

- Past due amount
- How to contact the home energy supplier to pay
- Impact on APP participation

6.5.5 Removal for Non-Pay

If a customer misses the equivalent of two monthly payments and is disenrolled from the APP, notice will be sent including:

- Notice of removal
- The home energy supplier will advise steps for additional support which could include a home energy supplier's payment plan, SER, or referral to a MEAP grantee.

See Appendix 4-E for a Removal for Non-Pay Communication form.

6.5.6 APP Plan Conclusion (enrolling on a budget plan):

At the conclusion of an APP plan when the participant remains a customer of the APP home energy supplier, the home energy supplier will provide information as follows:

- Details of the transition
- Details of the new plan
- How to opt out of budget plan

Appendix 6-F illustrates a sample plan conclusion communication.

6.6 The Home Energy Supplier APP Benefit Matrix

A benefit matrix tool, referred to throughout as the MEAP Benefit Calculator, has been developed by the MPSC to facilitate consistency in benefit matrix foundations and customer outcomes. The tool contains a calculator function that grantees may use to more easily discern and communicate the appropriate benefit for customers' needs.

List of Appendices Related to Section 6

Appendix 6-A Sample Disenrollment Communication
Appendix 6-B Sample Enrollment Communication
Appendix 6-C Sample Budget Review / Reconciliation Communication
Appendix 6-D Revalidation Letter (To be provided at a later date)
Appendix 6-E Sample Removal for Non-Pay Communication
Appendix 6-F Sample APP Plan Conclusion Communication

Section 7.0 Grant Expenditures

In this section, grantees are provided with guidelines for expenses that are charged to the MEAP Grant. This section will outline budget and process parameters for expenses charged to the MEAP grant.

7.1 Grantee Registration

The MEAP Grantee will be directed to the State of Michigan's SIGMA Vendor Self Service (VSS) website- michigan.gov/sigmavss. The Grantee must register as a vendor on this website to receive distributions from the MEAP and will not receive payment until they are registered as a vendor with the State of Michigan.

The Grantee must ensure that the name and address on the grant contract matches the registered name and address for vendor registration.

The Grantee must also be registered in SAM.gov and provide a Unique Entity ID (formerly DUNS number). Since MEAP grantees are Non-Federal Users of SAM.gov, full registration is not required. Click on "Get Unique Entity ID." Visit SAM.gov or the link above for more information.

For instructions on how to begin the process please see Appendix 7-A, Vendor Registration Guide.

7.2 Grant Payment Schedule

Two separate initial advances of 50% of the grant awards for each of the federal and state portions of the grant awards will be made to the selected applicant after Grant Agreements are fully executed.

Two subsequent advances of 20% will be provided upon submission of a Financial Status Report/Payment Request for each of the state and federal portions of the grant award accompanied by documentation showing that at least 50% of the prior advance has been expended.

Ten percent (10%) of the total grant awards will be held back pending verification and approval of submitted financial status reports as well as an Interim Project Status Report.

Funds will be received by an Electronic Fund Transfer based on the information that the Grantee has entered into the State of Michigan's SIGMA Vendor Self Service (VSS). If no banking information is entered, payment will be sent by paper check.

7.3 Personnel

Personnel include all administrative and Energy Assistance Program personnel.

Timesheets and payroll registers must be submitted along with the monthly FSR for all staff for that reporting period. Hours worked on the grant will be calculated and reimbursed based on actual hourly rates, not budgeted amounts. Personnel costs can only include wages and fringe benefits for employees on the Grantee's payroll.

Note: Documentation of Self-Sufficiency/A16 services provided by workers employed by the grantee should include a time sheet itemizing time spent on Self-Sufficiency/A16 services.

The description should indicate which "type" of Self-Sufficiency/A16 service occurred.

Appendix 7-B is a sample time sheet for hourly individuals working on the grant and Appendix 7-C is a sample time sheet for salaried individuals working on the grant. The time sheets are provided as a guide; a time sheet used by the Grantee to track grant-related hours is also acceptable but must include all information requested in the sample time sheet. Please note the sample time sheets include columns for hours worked on the Grantee's MEAP grant and hours worked on other MEAP Projects. If your organization has a MEAP grant and is also providing services to another MEAP Grantee, it is required that those hours are reported on the time sheet.

See Appendix 7-D for examples of allowable A16 services and Appendix 7-E for a sample timecard for breaking down time spent on different tasks.

Overtime at a rate of time and a half of compensation for hours over 40 is allowable for LIEAF Personnel.

7.3.1 Disallowed Personnel Expenditures

Disallowed costs include but are not limited to the following:

- Bonuses
- Tuition Reimbursement/Remission
- Vehicle Allowance
- Seminars
- Conferences
- Meetings
- Subscriptions
- Dues and Memberships

7.3.2 Fringe Benefits

Fringe benefits may not exceed 35% of the employee's salary. Fringe benefits will be reimbursed based on actual expenditures up to 35%, not on budgeted amounts. Allowable benefits include:

- Health, dental, and optical insurance,
- Employer-paid Social Security and Medicare tax,
- Michigan and Federal unemployment tax,
- Other miscellaneous fringe benefits (life insurance, long- and short-term disability insurance, worker's compensation, and retirement program contributions up to 4%).

The fringe benefits that are charged to the program should not be more than what the Grantee is reported as paying on the actual paystub, for example some fringe benefits are calculated after pre- tax deductions are taken out. The Grantee must submit documentation that supports actual expenditures including invoices and proof of payment for all insurances; worker's compensation documentation with employee classification codes; unemployment statements that include current employer rate; invoices with all documentation supporting employer paid contributions to retirement and 401k programs.

A copy of the organization's policies and procedures (employee handbook etc.) regarding fringe benefits must also be provided to the MPSC.

7.3.3 Opting Out of Insurance Coverage

If the Grantee offers a program that compensates employees for opting out of insurance coverage, the Grantee must provide details regarding the opt-out program, and a breakdown of costs for each individual working on the grant that has chosen to participate. Payments made to employees who participate in the insurance opt-out program will be included in payroll and/or fringe benefit calculations.

7.4 Supplies, Materials, and Equipment

The Grantee will only be reimbursed for supplies, materials, and equipment included in the budget and/or detailed in the budget narrative. Documentation supporting the expenditures must be submitted with the FSR, including invoice and/or receipt, and proof of payment. The Grantee must also submit a summary page that details the items charged to this category during the reporting period that includes the budget line number the item is being charge to, the portion being charged to the grant, and the total being charged to the grant which must match the expenditures reported on the FSR under this budget category. See example below:

Chart 2: Supplies, Materials, and Equipment Summary Page Example

Item(s) Purchased	Budget Line No.	Amount Charged to Grant
Postage	94	$150
Outreach Brochures	96	$1,250
Total	N/A	$1,400

The cost of each individual equipment purchase must be preapproved by MPSC Staff or will result in the disallowance of that individual expenditure.

7.5 Contractual Services

All contracts must be competitively bid. In the event a competitive bid is not feasible or practical, the Grantee must obtain the written approval of the MPSC Grant Administrator before making a sole source selection. The Grantee must provide a

copy of contracts, memoranda of understanding, or agreements signed by the Grantee and all contractors listed in the budget under Contractual Services. All contracts and 1099 vendors must be executed and uploaded to Salesforce with FSR #1 no later than two months after the signed MEAP agreement between the grantee and MPSC/LARA.

The Grantee will only be reimbursed for services performed by contractors included in the budget and/or detailed in the budget narrative. Documentation supporting expenditures must be submitted with the FSR including an invoice/statement providing a detailed explanation of all services performed, the dollar amount charged for each, and proof of payment. All receipts must include only expenses incurred by the contractor and must not include expenses (e.g., meal receipts, lodging, etc.) incurred by individuals on the Grantee's payroll.

Note: Documentation for Self-Sufficiency/A16 services provided by workers contracted by the grantee should include a breakdown of time spent on Self-Sufficiency/A16 services. The description should indicate which "type" of Self-Sufficiency/A16 service occurred. One way to complete this would be by using a time study to apply a standard breakdown for workers completing multiple tasks that fall into separate reporting categories. Contact the grant administrator with any questions regarding this documentation.

See Appendix 7-D for examples of eligible Self-Sufficiency/A16 services and a sample break down of time spent on different tasks.

7.6 Travel Expenditures

The Grantee will only be reimbursed for travel-related expenses included in the budget and/or detailed in the budget narrative at the rates set forth in Appendix 7-E. Appendix 7-F, Mileage Log, also provides a sample form to utilize for mileage expenditures. The following are additional travel guidelines that must be followed during the grant term:

Travel expenses listed in the travel budget category are strictly for individuals listed on the budget under Personnel.

- All travel must originate at the individual's assigned workstation. In cases where an individual working on the grant leaves from home, the reimbursement is the lesser of mileage from the official workstation to the assignment or from home to the assignment; however, Grantee must provide details including the individual's assigned workstation and the home address.

7.7 EAP Other Expenses

For services performed by subunits or internal agencies within the organization Grantees will only be reimbursed for those services included in the budget and/or detailed in the budget narrative. Documentation supporting expenditures must be submitted with the FSR including an invoice providing a detailed explanation of the services performed and per-case fee/dollar amount charged, and proof of payment.

7.8 EAP Direct Assistance Expenses

Grantees will be reimbursed for all verifiable energy assistance payments made to home energy suppliers. Grantees should establish a clear, consistent system for supporting documentation that will be remitted for Direct Energy Payments (e.g., Electronic Funds Transfer [EFT] and/or check, etc.) Documentation supporting expenditures must be submitted including a list of applicants served during the reporting period, cancelled check or check copy and bank statement, documentation supporting EFT transactions, and general ledgers. Ensure that all proof is provided for reversals to the General Ledger and provide a detailed explanation for the transaction(s).

If line items other than energy assistance payments are included under this category, documentation supporting expenditures must be submitted including invoice and/or receipt, and proof of payment.

7.9 Indirect Costs

Grantees will be reimbursed on monthly FSRs for the proportional share of indirect costs based on the indirect cost percentage indicated in the budget for LIEAF funding. Federal expenses will no longer be included in the calculation of State Indirect charges to LIEAF.

Documentation supporting indirect costs is not required; however, documentation verifying the costs must be retained by the Grantee in the event of an on-site audit.

If additional funds are awarded, the Grantee's indirect cost percentage must remain the same as originally approved at the beginning of the grant term. For example, if a grantee is awarded an additional sum of grant funding within the program year, and their original indirect rate was 0.012345, the indirect rate on the new funding amount must remain at 0.012345.

7.10 Budget Revisions

Revisions to the Grantee budgets are often necessary during the grant term as estimates become actual costs. Budget revisions require the MPSC Grant Administrator's approval and may require the approval of the Department of Licensing and Regulatory Affairs (LARA). A revised budget and budget narrative with revisions in a format agreed upon with the grant auditor should be submitted for approval to the MEAP Grant Administrator along with the reason for revision prior to the Grantee making the actual changes.

Any modification to the budget requires the Grantee to submit an updated detailed budget and obtain written approval from the Grant Administrator prior to expending any funds. A formal amendment to this Agreement is required if cumulative changes to direct costs within any budget category total ten percent (10%) or more of that category's original amount. Formal amendments will be accepted through August 31, 2027. Budget modification requests to reallocate funding into Direct Assistance Payments only are allowable between September 1,

2027, and September 15, 2027, with written approval by the Grant Administrator prior to expending any funds.

- The Grantee must submit all budget amendment requests no later than 30 calendar days prior to the end of the grant period. Requests submitted within the final 30 days of the grant period may not be accepted.
- Budget modifications after the grant period end date may not be accepted.
- Grantor may disallow any expenditure not in the approved budget or made without prior written authorization.

7.10.1 Updates Within Budget Categories

Grantees may reallocate funds within a budget category provided it does not change the total amount of funding allocated to the budget category. Grantees must obtain written permission from the MPSC Grant Administrator before these changes are instituted. The total amounts contained in Attachment B to the grant contract must not change.

For example, a Grantee may move $500 from one salary line item to another salary line item without a formal grant amendment because the total dollar amount allocated to the Personnel budget category will not change.

Chart 3: Updates Within Budget Categories

Personnel	Old Budget	Change	New Budget
Employee 1	$1,500	($500)	$1,000
Employee 2	$1,000	$0	$1,000
Employee 3	$500	$500	$1,000
Total Personnel	$3,000	$0	$3,000

7.10.2 Updates Between Budget Categories

Formal Amendment NOT needed

Grantees may reallocate funds between budget categories (e.g., from Personnel to Contractual Services) without a formal grant amendment if, and only if, the change is less than 10% of the total line-item amount. However, a revised budget and budget narrative should be submitted to the revision request for approval of the Grant Administrator.

The Grantee must obtain written permission from the MPSC Grant Administrator before these changes are instituted. Informal revisions may not generally be requested/approved outside of the grant period. However, exceptions may be made between October 1- October 15 to allow the move unspent funds from other State-

funded categories to Direct Assistance to serve additional households based on final APP invoices.

Formal Amendment Needed

Criteria for formal budget amendments that require approval by LARA.

- Cumulative budget changes equal to, or greater than, 10% of the total line-item amount require formal Budget Amendments.
- Reallocating funds from Direct Assistance to any other category is prohibited unless extenuating circumstances exist.

A formal budget amendment constitutes a renegotiation of contract terms and must be signed by the organization and the Director of LARA's Bureau of Finance and Administrative Services.

The following documents must be collected or generated by the MPSC Grant Administrator to initiate the grant amendment:

1) Request from Grantee:
   a. The Grantee must make a formal request to amend the budget. Such a request can be made via e-mail or on company letterhead. The request should explain why the budget amendment is being made and provide a detailed explanation of the changes being requested by line item.
   b. Attached to the request there should be an updated budget and budget narrative with changes highlighted in the budget narrative and three columns used in the updated budget (e.g., old budget, change, new budget). The updated budget and budget narrative should include all the proposed changes requested by the Grantee. The Grantee will prepare the updated budget and budget narrative and submit it to the MPSC Grant Administrator.

2) Preparation from Grant Administrator:
   a. The Grant Amendment is the official request to change contract terms. The Grant Amendment form should outline the proposed changes to the budget, and it should include a chart displaying the old and new budget category totals.
   b. The MPSC Grant Administrator will prepare the Grant Amendment form. The form prepared will be signed by a representative of the Grantee's organization and the Director of LARA's Bureau of Finance and Administrative Services. The effective date on the Grant Amendment will be based on the date LARA approves. However, LARA generally does not approve requests for effective dates that are greater than thirty days prior to the current date.

7.10.3 Grantee Employee Turnover and Leave of Absence

When grantee experiences employee turnover or an extended absence in leadership role such as CEO, Executive Director, CFO, or COO or any MEAP funded grant

management/leadership role, notification to MEAP staff must be timely and include a succession plan.

1) Procedure for Grantee Employee Turnover – Expected/Planned: Grantee will notify MEAP Staff (assigned auditor, grant administrator, and MEAP Manager) as soon as possible, prior to the departure of the MEAP-funded staff member, including naming the replacement member. If a replacement is not in place prior to departure, grantee must identify a key contact during the interim. Once a replacement is hired, grantee must communicate the replacement as soon as possible, prior to their start date. Follow the steps in 7.10.1 and 7.10.2 to request a budget amendment/revision.

2) Procedure for Grantee Employee Turnover – Unexpected/Unplanned: If the vacancy is unexpected and/or unplanned, Grantee will notify MEAP staff as soon as possible, but no later than two business days after the event. A key contact during the vacancy must be identified no later than five business days after the event. Once a replacement is hired, Grantee must communicate the replacement as soon as possible, prior to their start date. Include the name, position, effective date, pay rate and expected hours per week. Follow the steps in 7.10.1 and 7.10.2 to request a budget amendment/revision.

3) Procedure for Grantee Extended Leave of Absence: Grantee will notify MEAP Staff (assigned auditor, grant administrator, and MEAP Manager) as soon as possible, no later than two business days after the start of any extended absence greater than two weeks from a MEAP-funded position. Grantee must identify the expected duration of the absence as well as identify a key contact for the duration of the absence.

   A Grantee Turnover Checklist is provided as Appendix 7-G.

List of Appendices Related to Section 7

Appendix 7-A	Vendor Registration Guide
Appendix 7-B	Sample Hourly Time Sheet
Appendix 7-C	Sample Salary Time Sheet
Appendix 7-D	Examples of Allowable A16 services
Appendix 7-E	Travel Rates [To be added]
Appendix 7-F	Sample Mileage Log
Appendix 7-G	Grantee Turnover Checklist

Section 8.0 Program Monitoring and Reporting

The MEAP is accountable to the Michigan Legislature and to the Federal Department of Health and Human Services for LIHEAP A16 funding. To ensure program integrity and promote legislative goals, Grantees will be subject to a series of monitoring and reporting activities.

8.1 Reporting and Metrics

MEAP will track monitoring and reporting metrics as follows:

- Grantees will provide service outputs, household served data, and Financial Status Reports (FSRs, Appendix 8-A) monthly, as well as progress toward timeline, objectives, and milestones set forth in the Grantee's work plan,
- Grantee performance metrics will be based on tasks outlined in the RFP.
- Outcome measures will monitor program impacts and track achievement of legislative goals.

To assist with envisioning program impacts, a logic model is attached as Appendix 8-B.

8.1.1 Service Output Metrics

Service outputs measure the quantity and depth of services. More specifically, service outputs quantify how much or how many of a service was provided and the type of services provided.

Output measures are required for reporting on federal LIHEAP Assurance 16 funding. For purposes of MEAP grant reporting, in Fiscal Year 2027 the following outputs including the number of households served will be tracked regarding each of these self-sufficiency services:

- Needs Assessment/Referral Service
- Vendor Advocacy Type 1: non-APP
- Vendor Advocacy Type 2: New APP enrollment
- Vendor Advocacy Type 3: APP reverification
- Budgeting Services Type 1: Financial discussion
- Budgeting Services Type 2: Budget review
- Budgeting Services Type 3: Budget counseling
- Total number of unduplicated households served with Budgeting Services
- Energy Conservation Services Type 1: Energy savings discussion
- Energy Conservation Services Type 2: Conservation resources provision
- Energy Conservation Services Type 3: Energy education course
- Type 4: Weatherization referral
- Total number of unduplicated households served with Energy Conservation Services
- Short-term Case Management

- Longer-term Case Management
- Total number of unduplicated households receiving any type of self-sufficiency services

8.1.2 Households Served Data and Documentation List

The Grantee must adhere to standardized reporting requirements uniform lists of values and parameters when submitting low-income household information to MPSC, e.g., program year, Grantee ID, organization ID, MDHHS Case ID, income level, state, county, energy provider, assistance program, service type, etc., into selected applicant's low-income household tracking/database system. An MPSC Validation Tool spreadsheet is provided via Salesforce. The validation tool is an Excel worksheet. Grantees paste their applicant lists for energy payments and self-sufficiency services into the validation tool worksheet, ensuring the data is in the correct format and order. The tool checks data integrity and identifies high level data entry errors early, helping users to correct issues prior to submission. By catching errors up front, the tool improves workflow efficiency, reduces the number of applicant lists that must be deleted from Salesforce due to data quality issues, saves users time, and provides greater confidence that the submitted information is accurate and complete. The most recent version of the Tool is available for download on Salesforce.

The Grantee will provide two monthly Household Assist Files/Applicant Lists (using the two separate tabs on the Validation Tool template) that reflect every household served during each reporting period for each FSR and should include corresponding household information. One list will include any direct assistance payments, and the second list will include any households that received Self-Sufficiency/A16 services. An optional tab is available to track disenrolled households monthly, if desired.

Households served include those that received an energy assistance payment or participated in a self- sufficiency activity during the reporting period.

The Household Assist Files/Applicant Lists must be initially submitted by the Grantee in Salesforce to the Financial Status Report tab using the Validation Tool template. Once the file has been reviewed and verified by MEAP staff, the grantee will submit using the CSV format along with the corresponding FSR to the Household Assist tab.

A complete list of households that have been disenrolled from an APP during the reporting period must be submitted with the Grantees' Interim and Final Reports using the third tab on the Validation Tool template.

8.1.3 Household File Sampling

The MPSC will review and perform an attribute-sampling of the applicant lists, and request that the Grantee provide applicant/household energy payment and self-sufficiency/A16 documentation collected during the reporting period. All sample requests are due within 10 business days from the date of request. High-risk grantees may have additional requirements including, but not limited to, payment tracing documentation. Additional information related to payment tracing will be provided with such requests.

8.2 Monitoring

8.2.1 Financial Status Reports

Financial progress is reported on LARA Form C-108 Financial Status Report (FSR) (Appendix 8-A), one for state LIEAF funds and one for federal LIHEAP funds. FSRs are used to report expenditures, request advances of funding, and request reimbursement.

The Grantee will submit signed and dated FSRs to the MPSC Grant Administrator, through the online platform, Salesforce, indicating the amount of funds expended in each line-item category of the budget.

Monthly FSRs must include source documentation that supports all reported expenditures including, but not limited to, general ledgers, time sheets, payroll registers, invoices, check copies and bank statements, or cancelled checks. Expenses will be verified based on actual expenditures incurred within the grant period that are supported by source documentation, not the budgeted amounts. FSRs will be completed on Form C-108, which will be provided to the Grantee by the MPSC Grant Administrator. The C-108 provided will be formatted in accordance with the Grantee's approved budget. See Section 8.3 for the current year's Reporting Schedule. If the grantee cannot comply with the monthly reporting schedule, a request for an extension should be submitted to the MEAP Grant Administrator.

For the Final Financial Status Report, each Grantee must submit a signed and dated final FSR, Form C-108, to the MPSC Grant Administrator via Salesforce indicating the amount of funds expended in each line-item category of the budget by October 8th of the next fiscal year. The Final FSR must include source documentation that supports all reported expenditures including, but not limited to, general ledgers, time sheets, payroll registers, invoices, check copies and bank statements, or cancelled checks. Expenses will be verified based on actual expenditures incurred within the grant period that are supported by source documentation, not the budgeted amounts.

8.2.2 Project Status Reports

Interim and Final Project Status Reports are used to update MPSC on the programmatic progress of grant activity at specific intervals throughout the grant term. MPSC will use these reports to monitor performance and determine if time schedules are being met, delays are encountered, and the Grantee is meeting program objectives.

Grantee must submit Interim and Final Project Status Reports via Salesforce based on the current fiscal year's MEAP Reporting Schedule; see Section 8.3 for the current fiscal year's Reporting Schedule. The Interim Project Status Report Template is provided as Appendix 8-C and the Final Project Status Report Template is provided as Appendix 8-D.

8.2.3 Site Visits

The MPSC will conduct an initial site visit early in the program year . An initial site visit will be held with each Grantee; additional meetings will be scheduled as needed or requested. Site visits are utilized to meet the Grantee, discuss grant expectations, explain reporting requirements, and answer questions posed by the Grantee. As a substitute for the initial site visit, the Grantee may visit staff at the MPSC office in Lansing or hold a virtual site visit.

The MPSC will perform ongoing and regularly scheduled site visits, remotely or at the grantee's physical location, to monitor grant recipients. Site visits will be utilized to educate the Grantee about the grant process, assess project progress, observe project deliverables, and address problems, delays, or other issues that may arise during the grant term.

The MPSC will use a risk-based approach for scheduling and conducting site visits. Each grant poses a unique risk therefore requires a unique level of oversight by the MPSC. Throughout the grant term, corrective action plans (CAPs) will be implemented as needed. Corrective action plans will provide detail for any issues noted during the review period and the timeline in which the identified issues are required to be remedied.

8.2.4 Internal Monitoring

The Grantee must provide fiscal control and financial accounting procedures that will ensure that grant funds will be accounted for and properly dispersed in a way that will allow the Issuing Office to clearly review and verify all grant related expenditures. The Grantee must provide written and detailed internal control procedures, including a list of segregation of duties and a summary of your organization's whistle blower policy.

Chart 4: Example of Segregation of Duties

Duty	Responsibility of Duty	Name of Staff 1 Performing Duty	Name of Staff 2 Performing Duty
Cash	Responsible for receiving, securing, and depositing cash or check payments. Duties include verifying amounts received, preparing deposits, maintaining secure custody of funds until deposit, and ensuring all payments are recorded accurately in the organization's financial system. This role must follow internal controls to prevent loss, misappropriation, or errors.	Robert Allen	Susan Clark
Purchasing	Responsible for procuring goods and services allowable under MEAP (e.g., supplies, materials, equipment, contracted	Betty Smith	Jessica Bloom

	services) in accordance with approved budgets, state rules, and grant guidelines. Purchasing staff should not process vendor payments or reconcile bank accounts.		
Billings & Receivables	Responsible for generating and issuing invoices for amounts owed to the organization. This includes sending billing statements, logging receivables, tracking outstanding balances, and posting payments once received. This function maintains accurate receivable records but does not handle or deposit physical payments.	Kyle Kelly	Anna Perry
Accounts Receivable	Responsible for recording payments received, applying payments to appropriate accounts, monitoring ageing reports, and following up on overdue balances. This role ensures financial records accurately reflect incoming revenue. Accounts receivable staff may verify deposits but should not physically handle cash or conduct bank reconciliations.	Cathy Jones	Sierra Cole
Payroll	Responsible for processing employee payroll, including entering timesheet data, calculating wages, verifying hours against submitted documentation, and preparing payroll for approval. This duty includes managing payroll adjustments, deductions, and maintaining payroll records. Payroll staff should not have authority to add new employees to HR systems without reviewing or approving their own timesheets.	Elaine Mims	Kimberly Curtis

Each grantee should evaluate their administrative and program structure to determine process improvements and staffing changes that are needed to handle additional services and distribution activities prior to and during the grant term.

8.3 Program Year 2027 Reporting Dates

Grantees will be expected to submit reports in compliance with the timeline below.

Chart 1: FY 2027 Reporting Dates

Report Due Date	Report Type	FSR #	Period Covered
November 24, 2026	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	1	October 1 – October 31, 2026
November 30, 2026	Financial Status Report w/ Support	1	October 1 – October 31, 2026
December 29, 2026	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	2	November 1 – November 30, 2026
January 4, 2027	Financial Status Report w/ Support	2	November 1 – November 30, 2026
January 26, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	3	December 1 – December 31, 2026
February 1, 2027	Financial Status Report w/ Support	3	December 1 – December 31, 2026
February 23, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	4	January 1 – January 31, 2027
March 1, 2027	Financial Status Report w/ Support	4	January 1 – January 31, 2027
March 25, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	5	February 1 – February 28, 2027
March 31, 2027	Financial Status Report w/ Support	5	February 1 – February 28, 2027
April 26, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	6	March 1 – March 31, 2027
April 30, 2027	Financial Status Report w/ Support	6	March 1 – March 31, 2027
April 30, 2027	Interim Project Status Report		October 1, 2026 – March 31, 2027
May 25, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	7	April 1 – April 30, 2027
May 31, 2027	Financial Status Report w/ Support	7	April 1 – April 30, 2027
June 24, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	8	May 1 – May 31, 2027
June 30, 2027	Financial Status Report w/ Support	8	May 1 – May 31, 2027

July 27, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	9	June 1 – June 30, 2027
August 2, 2027	Financial Status Report w/ Support	9	June 1 – June 30, 2027
August 25, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	10	July 1 – July 31, 2027
August 31, 2027	Financial Status Report w/ Support	10	July 1 – July 31, 2027
September 10, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	11	August 1 – August 31, 2027
September 15, 2027	Financial Status Report w/ Support	11	August 1 – August 31, 2027
October 5, 2027	Project Milestones and Household Assist Files 1) Payments and 2) A16 / Self Sufficiency	12	September 1 – September 30, 2027
October 8, 2027	Financial Status Report w/ Support	12	September 1 – September 30, 2027
October 8, 2027	Final Project Report	October 1, 2026 – September 30, 2027	

List of Appendices Related to Section 8

Appendix 8-A Financial Status Report (FSR) Form C-108
Appendix 8-B MEAP Logic Model
Appendix 8-C Interim Project Status Report Template
Appendix 8-D Final Project Status Report Template

Section 9.0 Program Performance Metrics

Grantee performance will be monitored in accordance with tasks outlined below and consistent with the Request for Proposals (RFP), and grant contracts. The Grantee is required to assume responsibility for program monitoring and reporting utilizing the methods outlined in the RFP and in this manual.

9.1 Grantee Task Completion

Tasks required by MEAP Grantees include the following:

9.1.1 Promote Collaboration and Coordination of MEAP

1) Promote Education and outreach on availability of the assistance programs and funding.
2) Partner with MDHHS to become a Navigator/Referral Partner to support households in applying for energy assistance through SER; comply with MI Bridges established referral timeframes.
3) Ensure the organization's Michigan 2-1-1 Profile/Database Listing(s) is maintained throughout the grant year. Note: Applicants must be listed in the Michigan 2-1-1 Provider Database.
4) Coordinate availability of this low-income energy assistance program with home energy suppliers.
5) Coordinate energy assistance payments with energy suppliers, municipal owned utilities, cooperatives, distributors of deliverable fuels, and other energy assistance providers to more efficiently serve the needs of low-income households.
6) Coordinate availability of this low-income energy assistance program with other program services currently provided by the organization (e.g., budgeting or energy conservation, other wrap-around self-sufficiency/energy security services).
7) Coordinate availability of this low-income energy assistance program with other Applicants/ agencies to provide energy crisis prevention programs, weatherization, and education focused on reducing energy consumption.
8) Notify MEAP staff when organization's funding or availability of services has changed or is limited.
9) Participate in the MEAP Workgroup and provide representation on various subcommittees or ad-hoc committees.

9.1.2 Provide Assistance to Low-Income Households

This includes energy bill payment and services to assist low-income households in becoming or moving toward becoming self-sufficient and reducing energy insecurity.

1) Ensure that customers whose electric provider has opted out of collecting the LIEAF surcharge are redirected to the program required of their electric provider to provide similar assistance to MEAP for both electric and home heating needs.

2) Provide services that are accessible to customers in the geographic regions being served.

3) Prioritize vulnerable households per program protocols.

4) Determine eligibility utilizing categorical eligibility and the MEAP income calculation worksheet, complying with a standard of promptness.

5) Conduct needs assessments and make appropriate referrals for utility customers seeking assistance.

6) Develop and implement energy security plans as appropriate for each MEAP household. Energy security plans must outline the services to be provided, and may include enrollment in an APP.

7) Provide self-sufficiency services as outlined in the MEAP Manual.

8) Coordinate availability of home energy audits and home energy kits with home energy suppliers' energy waste reduction service implementors.

9) Provide referrals if Grantee is not able to assist low-income households due to exhausting MEAP funds before the end of the grant cycle.

9.1.3 Promote Access to MEAP In the Geographic Regions Served

1) Ensure that all household personally identifiable information (PII) and personal health information (PHI) collected, used, processed, stored or generated during the process of serving the applicant process is secured and maintained in a secure manner in compliance with II-FF, Confidentiality.

2) Ensure MDHHS information, including provider enrollment lists, is not used (or distributed) for any purpose other than administering MEAP.

3) Evaluate the organization's administrative and program structure to determine process improvements and staffing changes that are needed to handle household services and distribution activities beginning October 1, 2026.

4) Establish and implement quality control measures to ensure funds are used for the intended purpose. Quality control measures should be documented in the Applicant's workplan.

5) Work with MPSC and MDHHS to define and objectively evaluate the success of the program, including participating meaningfully in data capacity technical assistance activities.

6) Collect and document standardized reporting measures at prescribed intervals as requested.

7) Maintain data and metrics as specified in Section 8.0, Program Monitoring and Reporting.

8) Using the Salesforce database system, maintain and share household information with the MPSC. Adhere to standardized reporting requirements, including uniform lists of values and parameters when submitting low-income household information to the MPSC.

9) Participate in training opportunities as recommended by the MPSC or MDHHS.

9.2 Legal Compliance

Grantees are contractually obligated to comply with all applicable State and Federal laws, MEAP program guidelines, and contractual obligations. Specific expectations for the MEAP are outlined here:

1) For applicants who were eligible through SER approval prior to seeking MEAP assistance, issue energy assistance services to households in compliance with the Michigan LIHEAP State Plan and Program Integrity Assessment. Issue energy assistance to all households in compliance with the MEAP Policy Manual, OMB Uniform Guidance, and applicable state and federal law. This includes the tracking of self-sufficiency services and expenditures.

2) Ensure that energy payments are released only to eligible home energy suppliers. All home energy suppliers must be registered in the State of Michigan's SIGMA Vendor Self- Service System (VSS) (michigan.gov/VSSLogin) and be enrolled as an eligible supplier by MDHHS.

3) In compliance with R460.125(2) of the Michigan Administrative Rules, ensure that MEAP funds are not used to pay late payment fees assessed by regulated utilities and included on applicants' monthly heating bills. R460.125(2) states, "A utility shall not assess a late-payment charge against a residential customer whose payments are made by the department of health and human services or who is participating in a shutoff protection program described in Part 9 of these rules, R 460.145 to R 460.153."

4) In compliance with R460.126 of the Michigan Administrative Rules, ensure that MEAP funds are not used to pay for unregulated service charges, such as appliance repair or appliance protection programs, that may be included in a utility's monthly electric or gas bill. R460.126 states, "A utility may include charges for unregulated non-energy services, such as appliance repair or appliance protection programs, together with charges for natural gas and electric service on the same monthly bill if the charges for the unregulated nonenergy services are designated clearly and separately from the charges for the natural gas or electric service and it is noted that it is an unregulated service. Failure to pay for unregulated non-energy service charges may result in the termination of that service but not the shut off of the natural gas or electric service. If partial payment is made, the utility shall first credit payment to the balance outstanding

for natural gas or electric service pursuant to the provisions of R 460.123(7) and R 460.123(8) where applicable."

5) Issue a 1099-MISC Form to each vendor (provider)[49] who received $600 or more in MEAP funds, see 'Specific Instructions.' State of Michigan's guide for 1099 Reporting; IRS Instructions for the1099-MISC.

6) Ensure that assistance caps for MEAP as outlined in the MEAP Policy Manual are not exceeded. Cap exceptions are also outlined in the MEAP Policy Manual. Assistance payments that will cause the household to exceed caps must be approved by the Grant Administrator. Where possible, late fees for over-cap households should be waived by the energy provider.

7) Ensure APP guidelines and reporting deadlines set forth in the grant agreement are met, and the standardized reporting template for APP payments (provided by MPSC) is implemented.

8) Ensure APP contracts with energy suppliers, as guided by the MPSC contract template, are fully executed by the beginning of October 1st programming year. Additional stipulations must be approved by the MPSC and MDHHS prior to contract execution.

9) Ensure that the Affordable Payment Plan (APP) structure is followed by participating home energy suppliers. Notify the MSPC and MDHHS upon discovering contractual non-compliance.

9.3 Self-Sufficiency Services in MEAP Performance Metrics

Self-sufficiency guidelines are clarified in Section 5.0 this document. MEAP providers may conceptualize these metrics as a percentage of the total number of households served under the MEAP who receive various types of self-sufficiency services. For example, performance could be represented by the following equation for each type of service and for total self-sufficiency services:

$$\frac{\text{\# households receiving "weatherization referral"}}{\text{\# of households served by MEAP}}$$

[49] For purposes of the MEAP grant, "vendors" generally include entities or individuals providing contractual services that are not employees of the Grantee. This may include service providers, consultants, independent contractors, temporary workers, or companies providing project-related services or deliverables. Examples may include: A database or software service provider performing contracted services; or A company providing distribution or implementation services related to energy kits. Whether a Form 1099 must ultimately be issued is determined by applicable IRS requirements and the nature of the payment. Grantees are responsible for ensuring compliance with all federal tax reporting requirements and should consult their finance office, tax professional, or IRS guidance as needed.

9.4 Performance Deficiencies

Grantees will be monitored for contract compliance and performance. If and when deficiencies are identified corrective action steps will be implemented.

9.4.1 Identification of Deficiencies

Performance deficiencies may be identified through, but are not all inclusive of the following:

- Monitoring activities and file reviews
- Failure to complete required grantee tasks outlined in Section 9.1
- Non-compliance with MEAP Policy Manual, grant agreement, or applicable laws
- Data reporting discrepancies (e.g., Salesforce reporting, standardized metrics)
- Failure to meet performance metrics, including self-sufficiency service benchmarks
- Complaints from collaborators (e.g., MPSC, MDHHS, energy suppliers) or applicants resulting in findings

9.4.2 Corrective Action Plan (CAP)

The Corrective Action Plan (CAP) process ensures that MEAP Grantees comply with all programmatic, administrative, and legal requirements. The CAP framework provides a structured approach to identify, address, and resolve performance deficiencies in a timely and consistent manner.

9.4.3 Corrective Action Requirements

1) Identification of Deficiencies: Performance deficiencies may be identified through, but are not all inclusive of the following:
    - Monitoring activities and file reviews
    - Data reporting discrepancies (e.g., Salesforce reporting, standardized metrics)
    - Failure to complete required grantee tasks outlined in Section 9.1
    - Non-compliance with MEAP Policy Manual, grant agreement, or applicable laws
    - Failure to meet performance metrics, including self-sufficiency service benchmarks
    - Complaints or findings from stakeholders (e.g., MPSC, MDHHS, energy suppliers)

2) Initial Notification: Grantees will receive written notification outlining:
    - Nature of the deficiency
    - Required corrective actions
    - Submission deadlines
    - Potential consequences for non-compliance

3) Timelines for Corrective Actions, unless otherwise specified:
    - Level 1 Deficiencies:

- Correction required within 1–5 business days
- These are low risk minor /administrative issues that do not impact program integrity. that have that would affect the program integrity.
- Example: FSRs, missing or incomplete, no signatures, incorrect budget amount, Late report submission, and possibly formatting errors.

- Level 2 Deficiencies:
  - CAP submission required within 5 business days, full resolution within 10–15 business days
  - These are issues that may affect compliance or service quality but not imminent danger.
  - Example: Applicant is not shut off but has received a notice of shut off and the grantee delays in delivering an application for eligibility. Not meeting training of staff. Or not following the policies and procedures that were created in their grant proposal.
- Level 3 Deficiencies:
  - CAP submission required within 3–5 business days, immediate corrective steps may be required within 24–72 hours, and full resolution timeline determined by MPSC/MDHHS based on severity.
  - These issues can pose a significant risk to the participants of the MEAP.
  - Example: Utility disconnection, health and safety issues, failure to provide services, fraud, misuse of funds, and may also include breach of confidentiality.

9.5 Legislative Goal Achievement

As with any program, it is important to keep an eye on the program's goals to stay true to the intent of the program and to increase success in the attainment of goals. Several goals may be derived from legislation authorizing the MEAP and the LIEAF. MDHHS together with MPSC will monitor program performance according to legislative goals and, as required by Public Act 198 of 2024, will issue an annual report to the Michigan Legislature.

Program goals for the MEAP can be found in its authorizing legislation, the MEAA and in MCL 400.1231 to 400.1235. Goals for the MEAP[50] are as follows:

1) To provide energy assistance to eligible low-income households. This is inferred from the legislative language, *"An act to provide energy assistance for low-income households; and to prescribe certain powers and duties of certain state departments and agencies,"*

2) To reduce home energy insecurity as stated in the MEAA, *"Energy assistance" means a program to reduce energy insecurity by assisting eligible low-income households in meeting their home energy costs for their primary residence."*

[50] MCL - Act 615 of 2012 - Michigan Legislature

3) To prioritize vulnerable populations for energy assistance as required in statue and stated, *"Energy assistance must prioritize vulnerable populations…"*

4) To include services to assist low-income households in becoming or moving toward becoming self-sufficient and reducing energy insecurity. This is also required as stated, *"…as appropriate for the household, include services that will enable participants to become or move toward becoming self-sufficient."*

Additional goals for the Low-Income Energy Assistance Fund (LIEAF) which funds the MEAP are addressed in PA 169 of 2024.[51] Subject to the limitations imposed in this section, the department of health and human services shall expend money from the fund, on appropriation, as provided in the Michigan energy assistance act, 2012 PA 615, MCL 400.1231 to 400.1235.

5) The department of health and human services, in consultation with the commission, shall ensure that all money collected for the fund from a geographic area is returned, to the extent possible, to that geographic area.

6) Ensure the fund is administered to promote Statewide access to the Michigan energy assistance program established in section 3 of the Michigan energy assistance act, 2012 PA 615, MCL 400.1233, and ensuring that funds collected from a specific geographic area are, to the extent possible, returned to eligible low-income customers in that specific geographic area. AND

7) Ensure the fund is administered to promote Collaboration between the department of health and human services, the commission, energy providers, and entities that administer assistance programs to ensure that eligible low-income customers in a geographic area are receiving funds proportional to what customers in that geographic area are being assessed.

8) Ensure the fund is by administered entities that administer assistance programs as well as energy providers to promote Education and outreach on availability of the assistance programs and funding.

[51] 2024-PA-0169.pdf

List of Appendices Related to Section 9

There are currently no appendices associated with this section.

Section 10.0 Coordination of Services

Per PA 198 of 2024, the MDHHS shall "attempt to coordinate its efforts with the efforts of other state departments or agencies to assist low-income households in becoming or moving toward becoming self-sufficient and reducing energy insecurity." Grantees are expected to promote energy security and self-sufficiency by coordinating availability of this low-income energy assistance program with other program services currently provided as well as with other Grantees/agencies that provide energy assistance, weatherization, and education focused on reducing energy consumption and by coordinating services to address needs identified in the Needs Assessment/Referral process. A list of grantees with key contacts may be found attached as Appendix 10-A.

10.1 Promote Education and Outreach

PA 169 of 2024 requires that MDHHS, in consultation with MPSC, shall ensure that all money collected for the fund from a geographic area is returned, to the extent possible, to that geographic area and ensure the fund is administered to promote education and outreach on availability of the assistance programs and funding. The Grantee should conduct outreach activities designed to ensure eligible households, especially households with vulnerable populations, and households with high home energy burdens, are made aware of the assistance available under this program and any other energy related assistance programs.

10.2 Coordinate with Michigan 2-1-1

Grantees are expected to ensure the organization's Michigan 2-1-1 Profile/Database Listing(s) is maintained throughout the grant year. Applicants must be listed in the Michigan 2-1-1 Provider Database (Find Help - Michigan 2-1-1). Grantees and service providers can be connected through mi211.org/providers.

10.3 Become a Navigator/Referral Partner

The Grantees are expected to partner with MDHHS to become a Navigation and Referral Partner to support eligible households in applying for energy crisis assistance through SER and comply with MI Bridges established referral timeframes. MI Bridges training is required to become a Navigation Partner.

A Navigation Partner is an agency that agrees to promote MI Bridges by displaying promotional materials, providing a computer(s), tablet(s), or mobile device(s) to be utilized to access MI Bridges and providing one-on-one technical and navigation assistance to potential MI Bridges applicants. The assistance provided may vary from simply answering applicant questions to helping them complete a needs survey and application online. This typically includes teaching persons how to use the system themselves, such as those without computer knowledge or literacy skills.

A Referral Partner is an agency that agrees to receive referrals sent directly from applicants using MI Bridges. Applicants can identify a need using the "Help Me Find Resources" feature, and the referral agency will be listed if it can help meet that need.

The Referral Partner will receive referrals on their MI Bridges dashboard and contact the applicant to provide services within two business days.

Expectations for MI Bridges coordination:

- Promote MI Bridges to your organization's applicants, including making available MI Bridges educational materials and incorporating the use of MI Bridges into organizational processes where applicable.
- Ensure that your organization's lead point of contact actively manages all MI Bridges user accounts associated with your organization, including routinely confirming all user information is accurate and up-to-date and immediately terminating users that no longer need access to MI Bridges (e.g., as a result of a staff person leaving the organization or moving to a position which no longer requires MI Bridges access).
- Ensure that all agency staff and volunteers who are utilizing MI Bridges are registered as users and complete all required MI Bridges training(s) provided by the MDHHS for their community partner role/permission level prior to providing MI Bridges assistance.
- Ensure that your organization never charges a fee to provide MI Bridges assistance.

10.4 Coordinate with Home Energy Suppliers

Grantees are expected to coordinate availability of the MEAP and energy assistance payments with energy suppliers including municipal owned utilities, cooperatives, distributors of deliverable fuels, and other energy assistance providers to more efficiently serve the needs of low-income households. Grantee communication and coordination with energy suppliers / energy vendors is essential to addressing the reduction of energy insecurity for Michigan's income-qualified customers. Grantees coordinate with energy suppliers in a variety of ways. The following are example of various ways grantees may support coordination efforts:

- Educating vendors on MEAP parameters, grantee referral and triage protocols, and providing guidance on enrollment as a vendor
- Ensuring that customer electric providers are participating in the LIEAF funding factor
- APP projection, enrollment, and payment coordination
- Vendor advocacy to clarify and resolve account complexities
- Scheduling account holds and making payment commitments through various methods as preferred by the energy supplier
- Notification of availability or lapses in availability of assistance
- Referring customers to energy supplier energy waste reduction services

- Providing data on the number of customers and level of funding provided by the grantee to the vendor's customers

10.5 Coordinate with the Organization's Other Program Services

The Grantees are expected to coordinate the availability of the MEAP low-income assistance program with other program services currently provided by the grantee. This includes self-sufficiency/energy security services outlined in the Guidelines for Self-Sufficiency Services found in Section 5.0 of this manual and other services offered by the Grantee such as food assistance, and housing assistance, for example.

10.6 Coordinate with Other Agencies / Grantees

Coordinate availability of this low-income energy assistance program with other Agencies/Grantees to provide energy assistance programs, weatherization, and education focused on reducing energy consumption.

Grantees are expected to encourage households to pursue potential resources to promote home energy security which includes providing information to potentially eligible households (at or below 110% FPL) of the availability of the Home Heating Credit. Applications for the Home Heating Credit can be filed from January 1 through September 30 of each program year.[52]

10.7 Notification of Service Status

Grantees must notify MEAP staff when organization's funding or availability of services has changed or is limited. The Grantee must notify MPSC before funds have been exhausted or the availability of services has changed or is limited. When notifying the MPSC, the grantee must indicate the date by which funds will be exhausted or paused and then notify Michigan 2-1-1 and the MI Bridges Referral Portal have been updated to reflect the organization's service status. The organization's Michigan 2-1-1 Profile/Database Listing(s) must be maintained throughout the grant year.

10.8 Coordination Through Participation

Grantees are expected to participate in training opportunities as recommended by the MPSC or MDHHS, including the MEAP Workgroup, and provide representation on various subcommittees or ad-hoc committees. Contact the MEAP Grant Administrator to enquire about meeting notifications.

10.9 Regional Coordination

Grantees are expected to coordinate with other grantees to serve the regions for which they are allocated funds. Coordination may take many forms from informal and unscheduled communications to regularly scheduled and structured meetings. Coordination may be done as practical in conjunction with coordination activities for other service types.

[52] TAX ACT OF 1967 Act 281 of 1967, section 206.527a: (9)

List of Appendices Related to Section 10

Appendix 10-A MEAP Grantees and Key Contacts List

APPENDICES SECTION

APPENDIX 1-A GLOSSARY OF TERMS

Terminology	Description
ADA	The Americans with Disabilities Act (ADA) protects people with disabilities from discrimination.
APP	Affordable Payment Plan, a program that provides a household with a more affordable and predictable energy payment for an established period of time and includes a component for arrearage forgiveness when necessary.
Assurance 16 (A-16) Services	The LIHEAP statute which requires states to adhere to 16 different requirements or assurances. Assurance 16 (A16) allows states to spend up to 5% of their LIHEAP Block Grant funds on "services that encourage and enable households to reduce their home energy needs and thereby the need for energy assistance.
BCAEO	Bureau of Community Action and Economic Opportunity, created by the Michigan Economic and Social Opportunity Act of 1981, Act 230 of 1981 as amended by Public Act 123 of 2003. Operating under MDHHS, BCAEO provides the designation of community action agencies in Michigan.
Budget Counseling	Budgeting Service Type 3 - spending at least a total of 90 minutes meeting with an applicant individually or in a group class setting throughout one or more meetings with the specific purpose of providing coaching and advice on household budget management.
Budget Review	Budgeting Service Type 2 - assisting an applicant with completing a budget form including their monthly income and expenses or reviewing the applicants independently completed budget with them and coaching them on how they may increase income or reduce expenses.
Budgeting Services	Providing financial coaching, financial literacy education, and/or financial management training based on the needs assessment/referral service.
CAA	Community Action Agency, a local private or public non-profit organization in the United States and its territories created by the federal government in 1964 to combat poverty in geographically designated areas.
CAP	Corrective Action Plan, a structured approach to identifying, addressing, and preventing recurring issues within an organization, ensuring long-term improvements and compliance.

Terminology	Description
Cap	A limit on the amount of money that can be spent during the grant year to assist a household.
Categorical Eligibility	Policies that make a household eligible for energy assistance based on the household's involvement in other low-income assistance programs that utilize similar eligibility criteria. Households which receive SER would be determined categorically eligible to receive MEAP and A-16 Services.
Commission	Michigan Public Service Commission whose mission is to serve the public by ensuring safe, reliable, and accessible energy and telecommunications services at reasonable rates.
Conservation Resources	Energy Conservation Services Type 2 - providing the applicant with material energy conservation resources such as weather-stripping, low-energy use lights bulbs, outlet covers, etc.
Crisis	• An individual or recipient has received a past due notice on an energy bill for the individual's or recipient's household. • A residential fuel tank is estimated to contain not more than 30% of its heating fuel capacity. • A stated need for deliverable fuel or a non-traditional fuel source in which there is no meter or regular energy bill provided. • A notice that the balance in a prepayment account is below a minimum amount.
Department	Michigan Department of Health and Human Services (MDHHS), a principal department of state of Michigan that provides public assistance, child and family welfare services, and oversees health policy and management.
EAP	"Energy Assistance Program" refers to grant funds directly related to the delivery of energy assistance program services. EAP costs should include Program Costs, and Self-sufficiency Costs and Direct Energy Assistance Payments.
Eligible Low-Income Household	A household with an income of 60% of the state median income or below and whose electric utility does not opt-out of collecting the low-income energy assistance funding factor under section 9t of 1939 PA 3, MCL 460.9t.
Energy Assistance	A program to reduce energy insecurity by assisting eligible low-income households in meeting their home energy costs for their primary residence through payment or partial payment of bills for 1

Terminology	Description
	or more of the following: electricity, natural gas, propane, heating oil, any other deliverable fuel used to provide heat
Energy Conservation Services	Assisting an applicant, based on the needs assessment/referral service, to develop a better understanding of their energy bill, identify strategies to mitigate their usage thereby managing their energy expenses, and connecting households with weatherization and/or pre-weatherization services.
Energy Education Course	Energy Conservation Services Type 3 - spending at least a total of 90 minutes meeting with an applicant individually or in a group class setting throughout one or more meetings with the specific purpose of providing coaching and advice on energy conservation.
Energy Savings Discussion	Energy Conservation Services Type 1 - means a discussion in person, by phone, in a virtual meeting, or through approved digital learning formats, i.e., interactive videos with comprehension checks and follow-up discussion to ensure understanding.
Energy Security Plan Form	A form available to document an appropriate energy security plan for the applicant household.
Energy Security Planning	Creating a plan together with a MEAP applicant, based on an assessment of the applicant's needs, toward a goal of improving self-sufficiency or enhancing energy security. Energy Security Planning does not include working with the applicant to complete an application for energy assistance nor a determination of the amount of energy assistance benefits.[53]
EWR	Energy Waste Reduction services (sometimes called energy optimization or, more generically, weatherization) means energy conservation or energy efficiency services that are demonstrated to produce measurable savings to help a household to achieve a greater degree of energy self- sufficiency. These services are typically funded through energy companies who utilize contractors to perform the work.
Federal Poverty Guidelines	The poverty guidelines published annually in the federal register by the United States Department of Health and Human Services under its authority to revise the poverty line under section 673(2) of subtitle B of title VI of the Omnibus Budget Reconciliation Act of 1981, 42 USC 9902.

[53] Carroll, David, APPRISE (2017). Understanding LIHEAP Assurance 16. neuac.org/wp-content/uploads/2023/10/2D-DavidCarrol.pdf

Terminology	Description
Financial discussion	Budgeting Service Type 1 - a discussion in person, by phone or in a virtual meeting of income and expense strategies with the applicant and documenting the strategies in a case note.
FSR	A LARA Form C-108 Financial Status Report (FSR) used to report expenditures, request advances of funding, and request reimbursement.
HESA	Home Energy Security Allowance is an alternative energy security assistance option for customers without access to Affordable Payment Plans. A HESA provides the customer with an opportunity to access assistance funds more easily and in a proactive manner, with the goal of preventing utility disconnection and prolonging household energy security.
LARA	Michigan Department of Licensing and Regulatory Affairs (LARA).
LIEAF	Low-Income Energy Assistance Fund, a monthly surcharge on each retail billing meter to assist low-income, at-risk residents with their utility bills created by Public Act 95 of 2013.
LIHEAP	Low Income Home Energy Assistance Program, a United States federal social services program first established in 1981 and funded annually through Congressional appropriations. The mission of LIHEAP is to assist low-income households, particularly those with the lowest incomes that pay a high proportion of household income for home energy. The program, part of the United States Department of Health and Human Services, is funded by grants appropriated from the federal government.
Longer Term Case Management	Providing Short Term Case Management and additionally working with participants over the course of two or more meetings to accomplish any of the following services: • Budget counseling • Energy education • Meeting for APP monitoring and support • Support with goals toward becoming self-sufficient
MDHHS	Michigan Department of Health and Human Services, a principal department of state of Michigan that provides public assistance, child and family welfare services, and oversees health policy and management.
MEAA	Michigan Energy Assistance Act, PA 615 of 2012, requiring the Department of Health and Human Services to establish and administer the Michigan Energy Assistance Program.

Terminology	Description
Navigation Partner	A Navigation Partner is an agency that agrees to promote MI Bridges by displaying promotional materials, providing a computer(s), tablet(s), or mobile device(s) to be utilized to access MI Bridges and providing one-on-one technical and navigation assistance to potential MI Bridges applicants.
Needs Assessment/ Referral Service (NARS)	Utilizing a common set of questions provided in the MEAP Manual in a relational format (be it in a virtual meeting, in-person, or by phone) to assess the needs of applicants and tailor services and/or referrals based on needs identified in the assessment.
PII	Personally Identifiable Information (PII) - information that can be used on its own or with other information to identify, contact, or locate a single person, or to identify an individual in context.
PHI	Protected Health Information (PHI) - any information about health status, provision of healthcare or payment for healthcare.
Referral Partner	A Referral Partner is an agency that agrees to receive referrals sent directly from applicants using MI Bridges. Applicants can identify a need using the "Help Me Find Resources" feature, and the referral agency will be listed if it can help meet that need.
Short Term Case Management	Providing information and sharing materials about services available to MEAP applicants, developing an understanding of an applicant's needs and offering guidance during the MEAP relationship.
State median income	The state median income promulgated by the secretary of the United States Department of Health and Human Services in accordance with procedures established under section 2002 of the social security act, 42 USC 1397a, and adjusted, in accordance with regulations prescribed by the secretary, to take into account the number of individuals in the household.
Vendor Advocacy	Going beyond identifying account numbers, determining the balance owed, and making a payment commitment on an account. Vendor advocacy includes helping the applicant to communicate effectively with the vendor and facilitating details for maintaining service. This can include support needed for HESA bill payment assistance and always applies when helping the applicant to enroll in a home energy supplier affordable payment plan. Vendor advocacy does not include working with an applicant to complete an application, and in many cases vendor advocacy will not be necessary.
Vendor Advocacy Type 1: Non-APP	Helping the applicant to communicate effectively with the vendor and facilitating details for maintaining service. This applies for both

Terminology	Description
	crisis assistance and HESA bill payment assistance to reduce energy insecurity.
Vendor Advocacy Type 2: New APP Enrollment	Enrolling a customer in an APP for the first time with their electric or gas utility.
Vendor Advocacy Type 3: APP Reverification	Re-establishing income eligibility to retain APP enrollment.
Vital Documents	Vital documents means printed or electronic documents that provide important information necessary to access or participate in services, programs, and activities of a covered entity, including, but not limited to, applications, outreach materials, and written notices of rights, denials, losses, or decreases in benefits or services
Vulnerable populations	Eligible low-income households that have at least 1 member that meets the following criteria: • Is a child under 5 years of age. • Is an individual with a disability. • Is an individual who is 60 years of age or older. • Is an individual who has experienced homelessness in the preceding 12 months and who needs energy assistance to secure housing.
WAP	Weatherization Assistance Program, a program supported by funds provided by the U.S. Department of Energy to provide low cost and cost-effective energy related home repairs.
Weatherization	A program supported by funds provided by the U.S. Department of Energy Weatherization Assistance Program (WAP) and/or LIHEAP funds to provide low cost and cost- effective energy related home repairs. In Michigan, these programs are provided by Community Action Agencies (CAAs) and coordinated through the department's Bureau of Community Action and Economic Opportunity (BCAEO).
Weatherization Referral	Energy Conservation Services Type 4 - a referral to a weatherization, pre- weatherization, or energy waste reduction services home energy supplier program contact where it is known that the connection between the program and the applicant occurred.

APPENDIX 3-B SER CO-PAYMENT DETAILS AND EXAMPLES

Understanding the DHS-1419, State Emergency Relief Decision Notice

SERVICE REQUESTED

An MDHHS SER crisis assistance payment can occur for one or more of the following energy services:

- Heat- Natural Gas/Wood/Other
- Heat – Deliverable Fuel
- All Electric Household
- Non-Heat Electricity
- Heat Deposit/Reconnect Fees
- Non-Heat Electric Deposit/Reconnect Fees

DHHS PAYS

This is the maximum payment the MDHHS will issue. If the client pays more than their required copayment, the MDHHS payment will be reduced.

YOUR PAYMENT

This is the cumulative amount the client must pay in order for the SER payment to be issued. As noted in the Decision Notice, MDHHS must have proof that the client payment(s) has been made by the required date in order for the payment(s) to be approved. Note: When a client copay is required, MDHHS will refer to the request as being "pseudo-certified" or "pseudo authorized". This means the payment amount has conditionally been approved but will not be made unless the client copay requirement has been satisfied.

TOTAL

This is the total amount required to resolve the crisis for the 30 day period.

DATES COVERED

The Dates Covered field identifies the SER 30 Day period. The first date of the 30-day period is the application date; the end date is the last day that the client has to provide verification that a required copayment has been made.

Here is an example of a decision notice:

BAY COUNTY DHS
1399 W CENTER RD
ESSEXVILLE MI 48732

Case Name: [redacted]
Case Number:
Date: **09/05/2025**
MDHHS Office: **BAY COUNTY DHS**

Specialist: **M. Client-connection**
Phone: **(844) 464-3447**
Fax: **(517) 346-9888**
Specialist ID: **MDHHS-ab**

STATE OF MICHIGAN
Department of Health and Human Services

If you do not understand this, call an MDHHS office in your area. MDHHS employees are prohibited by law from providing legal advice.
Si usted no entiende esto, llame a una oficina de MDHHS en su área. La ley prohíbe a los empleados de MDHHS proporcionar asesoría legal.
إذا واجهت صعوبة في فهم هذا الطلب، فاتصل بمكتب MDHHS الموجود في منطقتك. يحرم القانون على موظفي MDHHS إعطاء النصيحة القانونية.

[redacted]

BAY COUNTY DHS
1399 W CENTER RD
ESSEXVILLE MI 48732

STATE EMERGENCY RELIEF DECISION NOTICE

We have made a determination on your request for assistance.

Eligibility Group Number: [redacted]

SERVICE REQUESTED	DHS PAYS	YOUR PAYMENT	TOTAL	DATES COVERED
Heat - Natural Gas/Wood/Other	$ 265.16	$ 0.00	$ 265.16	09/05/2025 – 10/04/2025
Non-Heat Electricity	$ 16.09	$ 103.40	$ 119.49	09/05/2025 – 10/04/2025

1121930470000000

BAY COUNTY DHS
1399 W CENTER RD
ESSEXVILLE MI 48732

Case Name: [redacted]
Case Number:
Date: **09/05/2025**
MDHHS Office: **BAY COUNTY DHS**

Specialist: **M. Client-connection**
Phone: **(844) 464-3447**
Fax: **(517) 346-9888**
Specialist ID: **MDHHS-ab**

STATE OF MICHIGAN
Department of Health and Human Services

If you do not understand this, call an MDHHS office in your area.
MDHHS employees are prohibited by law from providing legal advice.
Si usted no entiende esto, llame a una oficina de MDHHS en su área.
La ley prohíbe a los empleados de MDHHS proporcionar asesoría legal.
إذا واجهت صعوبة في فهم هذا الطلب، فاتصل بمكتب MDHHS الموجود في منطقتك.
يحرم القانون على موظفي MDHHS إعطاء النصيحة القانونية.

[redacted]

BAY COUNTY DHS
1399 W CENTER RD
ESSEXVILLE MI 48732

STATE EMERGENCY RELIEF DECISION NOTICE

We have made a determination on your request for assistance.

Eligibility Group Number: [redacted]

SERVICE REQUESTED	DHS PAYS	YOUR PAYMENT	TOTAL	DATES COVERED
Heat - Natural Gas/Wood/Other	$ 265.16	$ 0.00	$ 265.16	09/05/2025 – 10/04/2025
Non-Heat Electricity	$ 16.09	$ 103.40	$ 119.49	09/05/2025 – 10/04/2025

1121930470000000

If you request assistance for a shelter-related item, energy (heating fuel and/or electricity) or other utilities, you must prove you have paid the amount(s) listed below before receiving emergency assistance.

All Shelter Obligations, including all your rent, mortgage or land contract payments and property taxes,

Energy Payment Obligations, Heating Fuel $ 53.00 and Electricity $ 29.00 every month. In addition to these amounts, you must pay any special heating and/or electric allowances, home heating credit, payments or vouchers received from a governmental agency.

Water and/or cooking gas $ 9.00 every month.

1121930470000000

HEARING RIGHTS

You have the right to request a hearing if you do not agree with any action or decision the department makes (including failure to act with reasonable promptness). You can ask for a hearing for FAP by phone. Hearings for all other programs must be requested in writing. At the hearing you can explain why you disagree with the action or decision and present evidence.

The request should include your name, address and case number. Attach a copy of this notice if possible. Go to http://www.michigan.gov/-/media/Project/Websites/mdhhs/Forms/DHS-18.dotx to download a form to use or contact local MDHHS office shown on the first page of this notice to request a form.

- Keep a copy of the request and any other document you attach for yourself.
- MDHHS must receive your request for appeal within 90 days of the mailing date of this notice. Your request must be received on or before 12/04/2025 or you will not be granted a hearing.
- MDHHS must receive your request for an appeal within 10 days of the mailing date of this notice to continue receiving your benefits. Return your request on or before 09/16/2025.

You may be required to repay any assistance that you receive while your appeal is pending if 1) the department's proposed action is upheld in the hearing decision, or 2) your request for appeal is withdrawn, or 3) you or your authorized representative do not attend this hearing.

You may choose anyone to represent you. If that person is not a lawyer or is not appointed by a court, you must give us your signed authorization. Attach a copy of the court's order if the person is court appointed to help you. The Michigan Administrative Hearing System (MAHS) will deny the request for an administrative hearing made by the representative if you do not provide proof of authorization. The authorized hearing representative needs to be authorized before they can make the request.

The Michigan Department of Health and Human Services (MDHHS) will not discriminate against any individual or group because of race, sex, religion, age, national origin, color, height, weight, marital status, sexual orientation, political beliefs or disability. If you need help with reading, writing, hearing, etc., under the Americans with Disabilities Act, you are invited to make your needs known to a MDHHS office in your area.



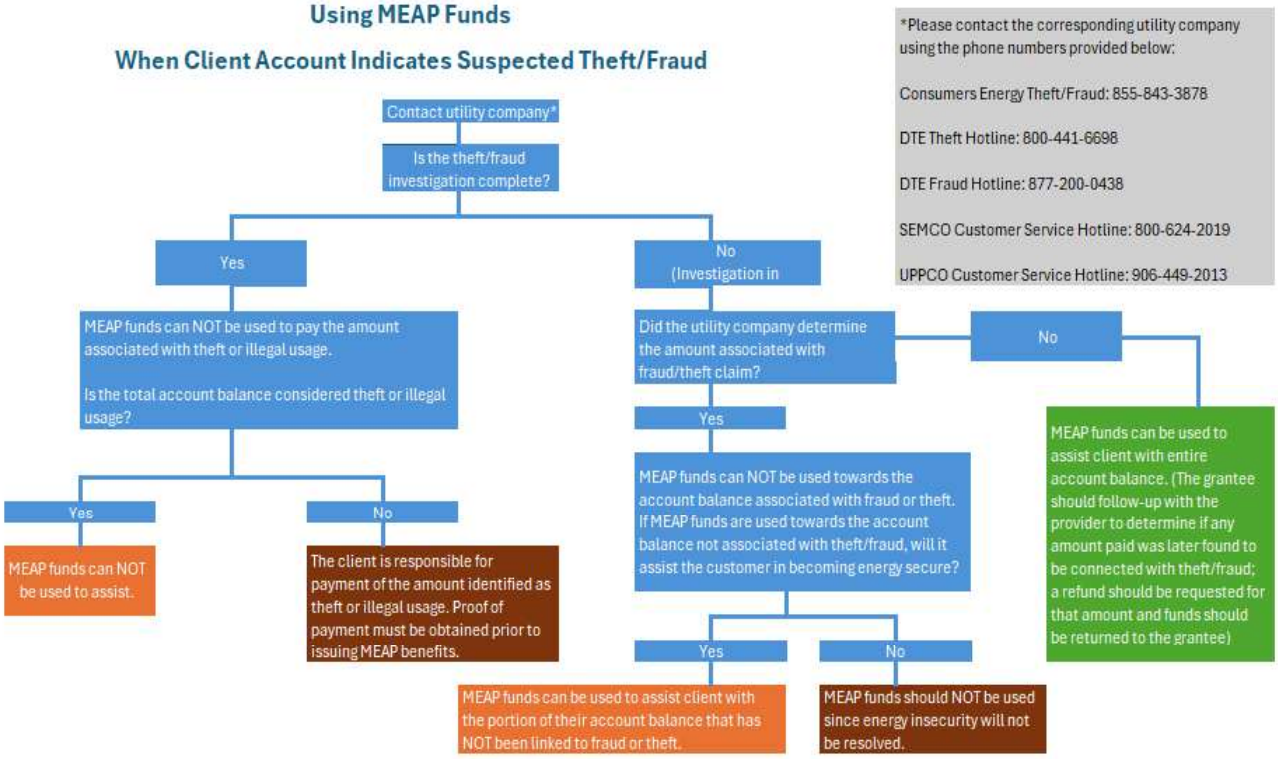
APPENDIX 3-C NON-COVERED SERVICES -DTE

Home Protection Plan (HPP- Non-Covered Service)
Example Screenshot: HPP charges and no Late Fees

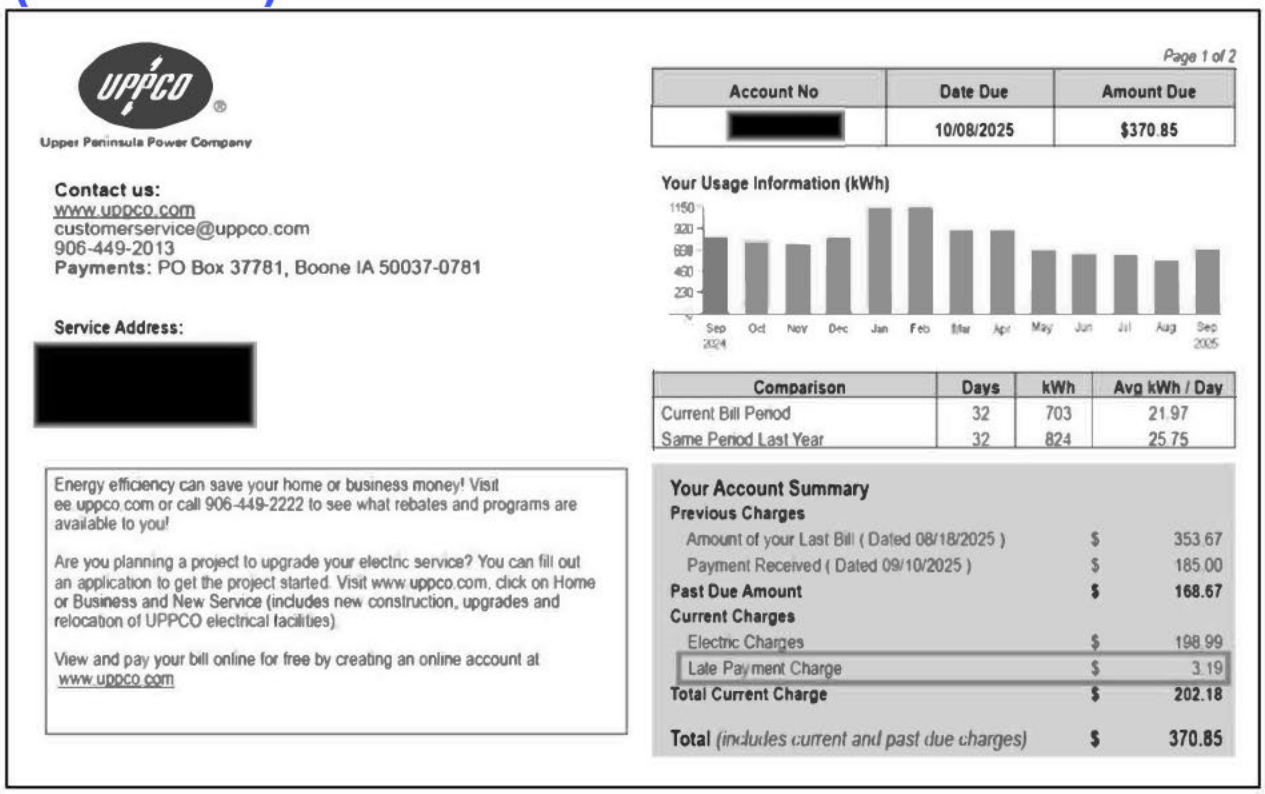
Account Balance Details

TYPE	CURRENT BALANCE	PAST DUE BALANCE	TOTAL BALANCE
Electric	$193.16	$350.72	$543.88
Gas	$118.67	$0.00	$118.67
HPP	$63.9●	$191.70	$255.60
SUBTOTAL			$918.15
Electric Late Fees			$0.●0
Gas Late Fees			$0.00
Deposit			$0.●●
Unbilled Charges			$0.0●
Other Charges			$0.00
Written Off			$0.00
ACCOUNT BALANCE TOTAL			$918.15

APPENDIX 3-F SUSPECTED THEFT/FRAUD FLOWCHART



APPENDIX 3-G LATE FEE EXAMPLES FOR UTILITIES (Condensed)



Upper Peninsula Power Company

Page 1 of 2

Account No	Date Due	Amount Due
[redacted]	10/08/2025	$370.85

Contact us:
www.uppco.com
customerservice@uppco.com
906-449-2013
Payments: PO Box 37781, Boone IA 50037-0781

Service Address:
[redacted]

Your Usage Information (kWh)

Comparison	Days	kWh	Avg kWh / Day
Current Bill Period	32	703	21.97
Same Period Last Year	32	824	25.75

Energy efficiency can save your home or business money! Visit ee uppco com or call 906-449-2222 to see what rebates and programs are available to you!

Are you planning a project to upgrade your electric service? You can fill out an application to get the project started. Visit www.uppco.com, click on Home or Business and New Service (includes new construction, upgrades and relocation of UPPCO electrical facilities).

View and pay your bill online for free by creating an online account at www.uppco.com

Your Account Summary

Previous Charges		
Amount of your Last Bill (Dated 08/18/2025)	$	353.67
Payment Received (Dated 09/10/2025)	$	185.00
Past Due Amount	**$**	**168.67**
Current Charges		
Electric Charges	$	198.99
Late Payment Charge	$	3.19
Total Current Charge	**$**	**202.18**
Total *(includes current and past due charges)*	**$**	**370.85**

For **Consumers Energy**, the late payment charges appear in the Account Summary section of a Consumers Energy Bill.

Late Payment Charge	$6.34

Those who have access to CE PASS can find these charges under the Details tab.

Electric Late Fee	$0.00	$0.00	$5.81
Gas Late Fee	$0.00	$0.00	$0.53

SEMCOENERGY
GAS COMPANY

Natural Gas *works for* Michigan

Account Information

Account Number	[redacted]
Name	
Service Address	
Account Type	Residential

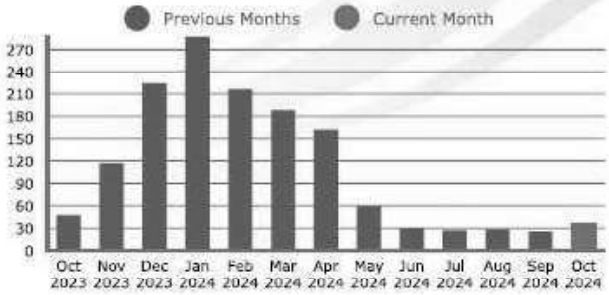
Account Summary

Balance Forward	**$32.48**
Current Charges	$39.03
Total Amount Due by **11/13/24**	**$71.51**
If Paid After 11/13/24	$72.86

SEMCO ENERGY News

TAKE US WITH YOU! Download the SEMCO Energy mobile app and manage your account from anywhere. Available on the Apple App Store or Android Google Play Store.

Usage History



Oct 2023 47 THM

Oct 2024 37 THM

Please return bottom portion with your payment.

See Back for Details

SEMCOENERGY
GAS COMPANY
PO BOX 5004 PORT HURON, MI 48061-5004

Make the natural choice choose eBill Today!

Account Number [redacted]
Service Address

Current Charges Due	11/13/24
TOTAL AMOUNT DUE	**$71.51**
If Paid After 11/13/24	$72.86

[redacted]

Amount Paid (if different than total)

Usage Detail

Meter Number:	Usage Period:	Previous Read:	Current Read:	Meter Factor:	Therm Factor:	Usage:
[redacted]	09/17/24-10/16/24	3898 (Actual)	3934 (Actual)	1.000	1.049	37.764 THM

Important Messages

The MICHIGAN PUBLIC SERVICE COMMISSION (MPSC) regulates SEMCO ENERGY Gas Company.

IF GAS SERVICE HAS BEEN SHUT OFF, ANY ATTEMPT TO RESTORE SERVICE BY ANYONE OTHER THAN AN AUTHORIZED SEMCO EMPLOYEE IS ILLEGAL AND DANGEROUS.

Any inquiry or complaint about the bill must be made before the due date. Call Customer Service at 1-800-624-2019 or mail inquiries and complaints directly to SEMCO ENERGY Gas Company at PO Box 5004, Port Huron, MI 48061-5004.

To report a Gas Leak or Emergency, call 1-888-GAS-1-GAS (888-427-1427).

SEMCO ENERGY Gas Company will pay interest at a rate as ordered by the MPSC on all deposits. Interest will be credited semi-annually on the customer's gas bill. Upon termination of service or satisfactory payment by the customer for a period of 12 successive months, the deposit with the remaining interest will be refunded to the customer of record.

Rate Class

1-Residential Customers	3-GS2	6601-28500 Therms
2-GS1 0-6600 Therms	4-GS3	28501 Therms and above

A complete set of rules, regulations, and rate schedules for gas service are available upon request and can be reviewed with company assistance.

811 Know what's below. Call before you dig.

211 Get Connected. Get Answers. Dial 211 to access programs and services in your community

Account Detail

Days Billed: 29

Previous Balance	$31.23
Previous Penalties	$0.65
Current Penalties	$0.60
Balance Forward	***$32.48***

Current Charges

SEMCO Cost of Gas (0.276590)	$10.45
Customer Charge	$12.25
MRP Charge	$0.72
IRIP Charge	$0.79
Distribution Charge (0.258600)	$9.77
Balance & Demand Charge (0.093900)	$3.55
Sales Tax	$1.50
Total Current Charges	**$39.03**

Total Amount Due by **11/13/24**

$71.51

Example **DTE** Screenshot: Late Payment Charges appear at the bottom of the bill the month they are issued

Other Charges and Credits	
Late Payment Charge	1.36
Total Other Charges and Credits	**1.36**

Example DTE Screenshot: Late fees and no HPP charges

Account Balance Details

TYPE	CURRENT BALANCE	PAST DUE BALANCE	TOTAL BALANCE
Electric	-$7.14	$105.18	$98.04
Gas	$53.14	$504.38	$557.52
SUBTOTAL			$655.56
Electric Late Fees			$8.06
Gas Late Fees			$21.38
Deposit			$0.00
Unbilled Charges			$0.00
Other Charges			$0.00
Written Off			$0.00
ACCOUNT BALANCE TOTAL			$678.05

MEAP Application

For Office Use ONLY. Please leave it blank. MDHHS Case ID/NO ID

Instructions

Submit your completed application and documents to your MEAP agency by mail, fax, online, or in person. Make sure that all requested documents are included, such as, utility bills, notices, quotes, and pay stubs or documents indicating your income. If your application is not complete, it will be delayed or returned.

For more information about the Michigan Energy Assistance Program and eligibility criteria, please visit the MPSC Get Help web page (Michigan.gov/MPSC/consumer/get-help/utility-customers).

◯ **This is my first time applying for MEAP assistance since October 1.**
- Please complete all sections within the application (Sections 1 - 8).

◯ **I have applied for MEAP assistance at least once since October 1.**
- Please complete sections 1 and 8 and any other sections that have changed in your household since your last MEAP application.

Section 1: Contact Information

Service Address | Apt./Unit # | City | Zip Code

County

Is this your primary residence? ◯ Yes ◯ No

If no, please explain

Mailing Address (if different from above) | P.O. Box # | City | Zip Code

Email | Phone #

Preferred Contact Method
◯ Email ◯ Phone ◯ Mail

People with disabilities may request this material in an alternate format by emailing LARA-MPSC-ADA-Requests@Michigan.gov or calling 517-284-8090.

Section 2: Household Member Information

List everyone who lives in your household, including their date of birth, starting with yourself. Household members include adults, children, members temporarily absent due to illness or employment, and anyone who sleeps and keeps their belongings in your home. Attach extra pages if needed.

	Relationship to You	Date of Birth	Disability?
1. First and Last Name			○ Yes ○ No
2. First and Last Name			○ Yes ○ No
3. First and Last Name			○ Yes ○ No
4. First and Last Name			○ Yes ○ No
5. First and Last Name			○ Yes ○ No

Have you or anyone in your household experienced homelessness in the past 12 months and need energy assistance to secure housing? ○ Yes ○ No

Section 3: Housing Information

What type of home do you live in (check one)?

○ Multi-unit (apartment, condo, duplex, etc.) ○ Single Family House ○ Mobile Home

What is your housing status (check one): ○ Own ○ Rent ○ Other

Do you have problems with any of the following (you may check more than one):

○ Concerns about faulty wiring
○ Holes in my walls, ceiling, or roof
○ Lead paint or lead pipes or mold problems
○ Major appliances not working
○ Pests, bugs, ants, or mice that may impact the structure of the home
○ Problems with plumbing, well, or septic
○ Smoke detectors missing or not working
○ Water leaks
○ None of the above.

Do you have any of the following heating/cooling issues (you may check more than one):

○ My heating is not working right.
○ There are drafts near doors or windows in my home.
○ None of the above.
○ I don't have a good way to cool my home.
○ The temperature is different throughout the house.

Section 4: Utility Service Information

How do you heat your home? ○ Natural Gas ○ Propane ○ Fuel Oil ○ Wood/Pellets
○ Electric (does not include space heaters) ○ Coal ○ Off-grid ○ Utility included in rent

Electric Provider's Name (**Required**) | Name on Account | Account #

○ My estimated electricity needs for the next 30 days amount to: $

○ I have received a past due notice.

○ My electric has been or is scheduled to be shut off. Date has/will be shut off

○ I received a notice that my prepayment account balance is below a minimum amount. Account balance

○ I have not received a notice, but would like help to pay my electricity bill. (Assistance may take up to 30 days).

Heating Provider's Name | Name on Account | Account #

○ My estimated heating needs for the next 30 days amount to: $

○ I have received a past due notice.

○ My heat has been or is scheduled to be shut off. Date has/will be shut off

○ My fuel tank is at 30% or less of its heating fuel capacity. Current percentage

○ I need a fill for a deliverable or a non-metered fuel source. Days remaining

○ I received a notice that my prepayment account balance is below a minimum amount. Account balance

○ I have not received a notice, but would like help to pay my heating bill. (Assistance may take up to 30 days).

Section 5: Current Benefits

Please check all benefits you receive and provide proof such as an approval letter or MI Bridges Screenshot (image must include your name, services and eligibility dates).

○ Family Independence Program (TANF/FIP)
☐ Food Assistance Program (SNAP/FAP)
○ Head Start
○ Home Heating Credit (HHC)
○ State Disability Assistance (SDA)
○ State Emergency Relief (SER)
○ Supplemental Security Income (SSI)
○ Women Infants Children (WIC)

Have you been approved for State Emergency Relief with MDHHS or MI Bridges for energy assistance, since October 1? ○ Yes ○ No

Have you been approved for a Home Heating Credit through the Department of Treasury for the current or previous tax year? ○ Yes ○ No

Section 6: Household Income

Does your household have any income? ○ Yes ○ No Monthly Total $

Have there been any changes or do you expect a change in your household income in the next 30 days? ○ Yes ○ No

If yes, please briefly explain.

Please check all sources of income that your household expects to receive in the next 30 days.

- ○ Child support
- ○ Disability benefits
- ○ Employment/earned income
- ○ Money from family/friends
- ○ Rental income or a land contract, mortgage or other payment payable to a household member
- ○ Pension/retirement benefits
- ○ Self-employment income
- ○ Social Security benefits
- ○ Supplemental Security Income (SSI)
- ○ Tribal payments (Energy Assistance / LIHEAP, tribal GA, casino/gambling profit sharing, land claims, etc.)
- ○ Unemployment
- ☐ Veteran's benefits/Military allotments
- ○ Worker's Compensation
- ○ Other, please list (ex: lottery winnings)

Complete the following for each income source your household receives. Provide supporting documents such as pay stubs, income and receipts for self-employment, benefit letters, etc. for the last 30 days.

1. First and Last Name

Gross Monthly Income (Before taxes/expenses)

Type of Income/Name of Employer

Received (Weekly, biweekly, monthly, etc.)

2. First and Last Name

Gross Monthly Income (Before taxes/expenses)

Type of Income/Name of Employer

Received (Weekly, biweekly, monthly, etc.)

3. First and Last Name

Gross Monthly Income (Before taxes/expenses)

Type of Income/Name of Employer

Received (Weekly, biweekly, monthly, etc.)

4. First and Last Name

Gross Monthly Income (Before taxes/expenses)

Type of Income/Name of Employer

Received (Weekly, biweekly, monthly, etc.)

Section 7: Deductible Expenses

Check all expenses your household pays and attach proof for each checked item.

- ○ Health Insurance Premium $ _____ Paid how often? _____
  Covered time period (1 mo., 3 mos., etc.) _____
- ○ Court Ordered Child Support (amount paid per month) $ _____
- ○ Actual Childcare Costs (Paid by the employed person, not MDHHS) $ _____
- ○ Unusual Employment Related Expenses $ _____

Explain expense _____

Section 8: Application Terms

Check the box to each statement below to indicate agreement.

- ○ I agree to provide all necessary documents within eight calendar days of submitting this application and understand that my application may be denied if I do not provide the required documents.
- ○ I give permission for my application and payment information to be shared with the Department of Health and Human Services, its affiliates and/or contracted agencies, to help improve Michigan's energy assistance programs and the Low-Income Home Energy Assistance Program (LIHEAP) and the Michigan Energy Assistance Program (MEAP).
- ○ I give the energy provider(s) listed in this application the permission to release all available information about my account by phone, fax, email and/or the energy providers website.
- ○ I give permission for my information to be shared with the local weatherization operator, so they can contact me about services that may help lower my energy costs, as part of the Weatherization Referral system.
- ○ I have read and examined the application, or had it read and examined by the MEAP representative. I understand the penalties for providing false information and certify that the statements and information contained in this application are true to the best of my knowledge and belief.

Signature of Applicant _____ Date Signed _____

Signature of MEAP Representative _____ Date Signed _____

For Office Use ONLY: Verbal Consent

- ○ I have completed and reviewed my MEAP Application form with a MEAP representative and authorize them to execute this application with my verbal consent in place of my signature.

Signature of MEAP Representative _____ Date Consent Received _____

APPENDIX 4-B MEAP APPLICATION CLIENT FILE SAMPLING CHECKLIST

State of Michigan
Department of Licensing and Regulatory Affairs
Michigan Public Service Commission (MPSC -CAD Division - MEAP Section)
Michigan Energy Assistance Program
MEAP APPLICATION CLIENT FILE SAMPLING CHECKLIST

MINIMUM INFORMATION TO COLLECT, VERIFY, SCAN AND RETAIN IN THE CLIENT FILE	CHECK IF APPLICABLE	ISSUES FOUND/RESOLVED AND/OR COMPLIANCE NOTED AND DATED BY APPLICABLE PARTY
Copy of **MEAP Application** Attached	Yes ☐ No ☐	
MEAP Application Dated	Yes ☐ No ☐	
MDHHS Case Number or alternate applicant identification NO ID provided	Yes ☐ No ☐	
Confirmed that Household is applying for the first time or reapplying for MEAP Assistance since October 1	Yes ☐ No ☐	
Documents support that household is not an opt-out electric provider such as: Bayfield Electric Cooperative; City of Harbor Springs; City of Wakefield; Coldwater Board of Public Utilities; Grand Haven Board of Light and Power; Holland Board of Public Works; Lowell Light and Power; Marquette Board of Light & Power; Wyandotte Department of Municipal; and Zeeland Board of Public Works	Yes ☐ No ☐	
Section 1: Contact Information -- all applicable areas for are completed on the application.	Yes ☐ No ☐	
Section 2: Household Member Information -- all applicable areas for are completed on the application	Yes ☐ No ☐	
Section 3: Housing Information -- all applicable areas for are completed on the application.	Yes ☐ No ☐	
Section 4: Utility Service Information -- all applicable areas for are completed on the application.	Yes ☐ No ☐	
Section 5: Current Benefits -- all applicable areas for are completed on the application.	Yes ☐ No ☐	
Section 6: Household Income -- all applicable areas for are completed on the application.	Yes ☐ No ☐	
Section 7: Deductible Expenses -- all applicable areas for are completed on the application.	Yes ☐ No ☐	
Section 8: Application Terms -- all applicable areas for are completed on the application.	Yes ☐ No ☐	

MINIMUM INFORMATION TO COLLECT, VERIFY, SCAN AND RETAIN IN THE CLIENT FILE	CHECK IF APPLICABLE	ISSUES FOUND/RESOLVED AND/OR COMPLIANCE NOTED AND DATED BY APPLICABLE PARTY
Direct Energy Payments have been uploaded to Salesforce with the Financial Status Report (FSR) as follows: • Spreadsheet with names of all the clients who are receiving assistance (if the check or EFT is for more than one client). • Check Request Form • Cleared check or EFT paperwork • Bank statement that links to the check or EFT/ACH cleared date • General Ledger • Additionally, APP payment support should include: • Utility Partner's client file and monthly enrollments	Yes ☐ No ☐	
Direct Energy Payments have been uploaded to Salesforce for client file sampling process as follows: • Eligibility Determination Documents • Quote for deliverable fuel -- Quote may be a verbal estimate over the phone, but the following information is required: Date; client name (and name on account if different) and case number; amount needed to resolve the emergency or tank at 30% or less; any other pertinent account information; name of the person at the utility company who provided the information; signature of the grantee's staff person obtaining the information. • Grantee letter committing to pay specified amount • Invoice or screenshot of amount paid using the utility provider's online portal or other verifiable documentation.	Yes ☐ No ☐	

Appendix 4-G MEAP ENERGY SECURITY PLAN FILE SAMPLING CHECKLIST

State of Michigan
Department of Licensing and Regulatory Affairs [LARA]
Michigan Public Service Commission (MPSC – CAD Division MEAP Section)
Michigan Energy Assistance Program
2027 MEAP Energy Security Plan Client File Sampling Checklist

MINIMUM INFORMATION TO COLLECT, VERIFY, SCAN AND RETAIN IN THE CLIENT FILE	CHECK IF APPLICABLE	ISSUES FOUND/RESOLVED AND/OR COMPLIANCE NOTED AND DATED BY APPLICABLE PARTY
Copy of **MEAP Energy Security Plan** in client file	Yes ☐ No ☐	
Full name of the applicant in household	Yes ☐ No ☐	
Confirmed that Household is applying for LIHEAP or EAP	Yes ☐ No ☐	
MEAP Application Dated	Yes ☐ No ☐	
MDHHS Case Number or alternate applicant identification NO ID provided	Yes ☐ No ☐	
Part A Energy Bill Payment Actions-- all applicable areas are completed in the Security Plan.	Yes ☐ No ☐	
1) **Vendor advocacy to help resolve issues with your utility provider (includes HESA or APP enrollment).**		
Part B – MEAP Services – Short Term -- all applicable areas are completed in the Security Plan.	Yes ☐ No ☐	
1) **Needs Assessment/Referral** questions reviewed	Yes ☐ No ☐	
2) **Financial discussion** of income and expense strategies	Yes ☐ No ☐	
3) **Budget Review** of income and expense categories	Yes ☐ No ☐	
4) **Energy savings discussion** with energy saving tips	Yes ☐ No ☐	
5) **Conservation Resources Provision** as supplies are available.	Yes ☐ No ☐	
Part C- Customer Actions – Steps to take for future challenges with managing energy bills: -- all applicable areas are completed in the Security Plan.	Yes ☐ No ☐	
1)		
2)		
3)		
Part D - MEAP Services-Long Term: all applicable areas are completed in the Security Plan.	Yes ☐ No ☐	
1) **Budget Counseling** as appointment or class times are available.	Yes ☐ No ☐	
2) **Energy Education Course** as times are available.	Yes ☐ No ☐	
3) **Meeting for APP monitoring and support** if enrolled and scheduled.	Yes ☐ No ☐	
4) **Additional Interactions** as agreed upon to support goals toward becoming self-sufficient	Yes ☐ No ☐	
Part E: Agreements -- all applicable areas are completed in the Security Plan.	Yes ☐ No ☐	

MEAP Energy Security Plan

A requirement of the MEAP Program is that MEAP agencies provide services that support participants in moving toward greater self-sufficiency and energy security. These services should be appropriate for your household. This Energy Security Plan (ESP) is used to discuss and confirm the services that we agree on together, and a copy will be provided to you.

Name of Participant	MEAP Application Date	Case No.

Part A

Your household received the following energy bill payment actions:

- ○ Placed a hold on your account.
- ○ Determined that you are eligible and can assist you.
- ○ Advocated with your utility provider to help resolve the following issues (VA-1):
  - ○ Ordered fuel delivery.
  - ○ Requested payment. You can expect to see that on your account within 30 days.
  - ○ Re/enrolled in an Affordable Payment Plan (VA 2 or 3). Provider 1:
  - ○ Re/enrolled in an Affordable Payment Plan (VA 2 or 3). Provider 2:
  - ○ Calculated a Home Energy Security Allowance for heating.
  - ○ Calculated a Home Energy Security Allowance for electric.

Part B

To support your energy security we talked about:

- ○ Whether you have additional needs and provided referrals. (NA/R, STCM)
- ○ Income and expense strategies. (B-1)
- ○ Your income and expense categories for budget planning. (B-2)
- ○ Energy savings and energy saving tips. (C-1)
- ○ We provided you with conservation resources or an energy conservation kit. (C-2)

Notes on Services Provided

Part C

Together we identified goals and/or steps to take for future challenges with managing energy bills:

1.

2.

3.

Part D

To support your goals toward self-sufficiency or energy security, we scheduled the following services:

- ○ Budget counseling as appointment or class. (B-3) Date
- ○ Energy education course. (C-3) Date
- ○ Meeting for APP monitoring and support if enrolled. (LTCM) Date
- ○ Additional interactions to support identified goals. (LTCM) Date

Services Plan Notes

Part E: Agreements

As part of this MEAP Energy Security Plan:

- ○ I understand that I may be referred to or requested to participate in additional services such as budgeting assistance, energy audits, or other programs that will help my household pay energy bills and understand energy use. Participation in the activities outlined in this plan/agreement may be required to receive additional energy assistance benefits.
- ○ I affirm that the Energy Security Plan Agreement has been reviewed with me by a MEAP Representative and agree with the outlined services listed in Parts A – D.

Signature of Participant

Date Signed

Signature of MEAP Representative

Date Signed

Verbal Consent (to be read to the participant): "Do you authorize me to review the MEAP Energy Security Plan with your verbal consent instead of a formal signature? yes or no?"

Date Consent Received

○ LIHEAP ○ EAP

Signature of MEAP Representative

Date Signed

APPENDIX 5-B MEAP NEEDS ASSESSMENT TOOL

Michigan Energy Assistance Program

Needs Assessment Tool

Date: _____ Staff Completing Assessment: _____

Case ID: _____ Applicant Name: _____

1. **Are you worried or concerned that in the next two months you may not have stable housing?**
   a. Yes
   b. No

2. **Within the past 12 months, did you worry that the food you bought wouldn't last and you wouldn't have money to get more?**
   a. Yes
   b. No
   c. I would like to talk about my food situation.

3. **Does anyone in your household need help finding a job or finding a better job?**
   a. Yes
   b. No

4. **Do you want help with school or training? For example, starting or completing job training or getting a high school diploma, or GED.**
   a. Yes
   b. No

5. **Does lack of reliable transportation keep you from appointments or work?**
   a. Yes
   b. No

6. **Do problems getting childcare make it difficult for you to work or study?**
   a. Yes
   b. No

7. **Do you have someone to help you if you need help with day-to-day activities such as bathing, preparing meals, shopping, caring for family members, managing finances, etc.?**
   a. I don't need any help.
   b. I get all the help I need.
   c. I could use a little more help.
   d. I need a lot more help.

People with disabilities may request this material in an alternate format by emailing LARA-MPSC-ADARequests@Michigan.gov or calling 1-517-284-8090.

Appendix 6-A Sample Disenrollment Communication

Month 1, 20XX

Customer
Address Line 1
Address Line 2

Account # 103012341234
Service Address 123 MAIN ST. JACKSON MI 49201
Enrollment Date: xx/xx/20xx

Dear [Customer First Name],

You have missed one or more CARE program payments. We want to help you stay in the program and keep your benefits.

To continue your benefits, please make a payment of $[xxx.xx] by [xx/xx/20xx].*

With the CARE program, you get:

- Lower monthly bills
- Help with past-due amounts
- Protection from shut-off while you are enrolled on the program

If we do not receive your payment by the due date, you may lose these benefits and be removed from the program. If you are removed from the CARE program because you do not pay, you will owe the full balance on your account, including any past-due amounts that were delayed while you were in the program.

If you can't make a payment right now, please contact the agency that helped you sign up for CARE. They can help find options.

Thank you for choosing us for your energy needs.

Sincerely,

Energy Assistance Team
ConsumersEnergy.com/assistance

Appendix 6-A Sample Disenrollment Warning Communication

Month 1, 20XX

Customer
Address Line 1
Address Line 2

Account # 103012341234
Service Address 123 MAIN ST. JACKSON MI 49201
Enrollment Date: xx/xx/20xx

Dear [Customer First Name],

We see that you missed one or more payments on your CARE program account. To stay in the program and keep your benefits, **please make payment today**. *

- You can pay:
  - Online at ConsumersEnergy.com
  - By phone at 800-477-5050

If you cannot pay right now, please contact the agency that helped you sign up for CARE. They may be able to help you find other support.
With the CARE program, you are getting:

- Lower monthly payments
- Help to reduce your past-due balance
- Protection from shut off while you are in the program

We want you to keep these benefits, so please make your payment.

Thank you for trusting us with your energy needs.

Sincerely,

Energy Assistance Team
ConsumersEnergy.com/assistance

*If you are removed from the CARE program because you do not pay, you will owe the full balance on your account, including any past-due amounts that were delayed while you were in the program. You must also keep paying any non-energy charges (like Oncourse Home Solutions), even while in CARE.

AA

[redacted] DDDDDDD B

DTE

Appendix 6-B Sample Enrollment Communication

03/24/2025

H

LS1**T015*2*P00**********MIXED ADC 480

[redacted]

Hello [redacted],

Welcome to DTE's Low-Income Self-Sufficiency Program, which will help you stay current on your energy bills and budget for your energy needs for the next 24 months.

Account Number: [redacted]
Service Address:
Monthly Payment: $146.00

Your fixed monthly bill payment amount in this program is $146.00 and is based on your income and energy usage. The past-due balance that you had upon enrollment, up to $3,000, will be gradually forgiven. Up to $600 will be forgiven now that you are enrolled in the Low-Income Self-Sufficiency Program. We will forgive more – up to an additional $600 – after you complete one year in the program. Plus, up to $1,800 of your remaining arrears will be forgiven when you successfully complete the program.

We will review your account twice a year to make sure your monthly payment reflects your actual usage. This helps to ensure you're paying down your account balance appropriately and makes your end-of-year settlement as low as possible.

Here's how it works:

- Every six months we review an average of your current energy usage and compare it to the last 12 months to determine your new average usage.
- If the new average is $5 higher or lower than your current payment amount, we'll adjust your payment amount.
- If there's a change to your payment amount, it will show in your next bill.

Your monthly plan amount does not include any non-energy charges, such as a Home Protection Plan.

If you have questions, please contact our Energy Advocacy Group at 800.317.9073 during business hours Monday through Friday, 8:30 a.m. to 5 p.m.

We look forward to working with you during your participation in our Low-Income Self-Sufficiency Plan.

Sincerely,

Your DTE Customer Service Team

15-20250324-CLA-7196-0050569252D91FD0829A558C221D66BD
15-20250324-LS1-7196

Appendix 6-B Sample Enrollment Communication

Month 1, 20XX

Customer
Address Line 1
Address Line 2

Account # 103012341234
Service Address 123 MAIN ST. JACKSON MI 49201
Enrollment Date: xx/xx/20xx

Welcome to the Consumers Energy CARE Program!

We're glad you're here. As part of the CARE program, you'll get these benefits:

- A monthly payment of **$[00.00]**
- Help lowering your past-due balance

Here's how the past due balance help works:

- Up to **$600** removed when you join
- Up to **$600 more removed each year**

What you need to know

Your monthly bill
Each month, your bill will show:

- Your actual energy use
- Your CARE payment amount- DUE EACH MONTH

Every 6 months
We will review your account. If your energy use is higher or lower, your CARE payment amount may go up or down.

Every 12 months
We will check your account balance:

- If you used more energy than you paid for, the difference will be added to your total bill balance
- If you used less, you will get a credit

If you have a credit when you finish CARE, it will be used on future bills until it is gone. Every 12/24 months revalidation is required.

You will see these changes on your first bill after joining CARE.

To keep your benefits:

- **Pay your bill on time each month**

Important:
CARE does not cover non-energy charges (like Oncourse Home Solutions). You will still need to pay these on top of your CARE monthly payment amount

If you are having trouble paying your bill, please contact the agency that helped you enroll, they may have additional help available.

We're here to support you and help you succeed in the CARE Program.

Sincerely,
Energy Assistance Team
ConsumersEnergy.com/assistance

[redacted] 0000000 8

DTE

Appendix 6-C Reconciliation Communication

08/04/2026

H

LS6.. T011·2•po1····· AuTO··scH 5-DIGIT 48214

[redacted]

Low-Income Self-Sufficiency Plan Annual Review

Account Number: [redacted]
Service Address: [redacted]

Hello [redacted]

Great news! Your monthly payment is lowering, based on our annual review of your Low-Income Self-Sufficiency Plan.

You used less energy than we budgeted for during your last review, so your monthly payment will be lower.

Current monthly payment:	$255.00
New monthly payment:	**$219.00**

You still have a reconciliation balance of $54.86, but don't worry. As a Low-Income Self-Sufficiency Plan participant, we are covering the cost.

At the end of your Low-Income Self-Sufficiency Plan, if you have a remaining reconciliation balance, we will connect you with an agency partner to help you pay down that balance.

Your monthly plan amount does not include any non-energy charges, such as a Home Protection Plan.

If you have questions, visit **dteenergy.com/lsp** for assistance.

Thank you for being a valued DTE customer.

Sincerely,

Your DTE Energy Customer Service Team

02-20260804-CLA-11851-00505692 52D91FE1A48C4114A610A269

02-20260804-LS6-11851

Appendix 6-C Sample Budget Review Communication

Month 1, 20XX

Customer
Address Line 1
Address Line 2

Account # 103012341234
Service Address 123 MAIN ST. JACKSON MI 49201
Enrollment Date: xx/xx/20xx

Dear [Customer First Name],

Thank you for being part of the CARE program.

Every 6 months, we review your account to make sure your monthly payment matches how much energy you use. After your recent review, we need to update your payment.

Starting next month, your new monthly payment will be **$[00.00]**. You will see this amount on your next bill.

You may find these options helpful for managing energy costs:

- **Helping Neighbors Program No cost home energy check:** You can get a free home energy assessment. You may also receive free energy-saving products and learn simple ways to lower your energy use. Call 877-448-9433 or visit ConsumersHelpingNeighbors.com.
- **Michigan Home Heating Credit:** You may be able to get money back for your heating costs from last winter. You can apply from January through September.
    - Free help to apply: You do not need to file taxes to apply. For help, call 2-1-1 or visit MichiganFreeTaxHelp.org.

Thank you for being on the CARE Program.

Sincerely,

Energy Assistance Team
ConsumersEnergy.com/assistance

[redacted] 0000000 8

DTE

Appendix 6-E Sample Removal for Non-Pay Communication

08/04/2026

H

77P**T033*2*P00**********MIXED ADC 480

[redacted]

Missed Payment - Low-Income Self-Sufficiency Plan

Account Number: [redacted]
Service Address: [redacted]

Dear [redacted]

We did not receive or process your payment by 2 p.m. on the due date. As a result, you are no longer covered by our Low-Income Self-Sufficiency Plan.

--- Please call us at **(800) 477-4747** to discuss payment options or you will be subject to service interruption.

Sincerely,

Your DTE Customer Service Team

01-20260803-CLA-926-0050569203CD1FE1A3F54FC917M62B8

01-20260803-TTP-926

[redacted] 0000000 8

DTE

Appendix 6-F Sample APP Plan Conclusion Communication – DTE Rollover BWB

08/31/2026

H

LSPR**T052*2*P00**********MIXED ADC 480

[redacted]

Low-Income Self-Sufficiency Plan Important Information

Account Number: [redacted]
Service Address: [redacted]

Dear [redacted]

Thank you for participating in our Low-Income Self-Sufficiency Plan. Your enrollment in this program ended on 08/31/2026. Moving forward, you will be responsible for your total monthly energy usage.

If you need further energy assistance, please visit **newmibridges.michigan.gov** to explore whether you qualify for State Emergency Relief. If you have trouble applying on the MI Bridges website, please call **(844) 799-9876.**

If the Michigan Department of Health & Human Services determines you are eligible for State Emergency Relief, we encourage you to reach out to one of our agency partners at **dteenergy.com/agencies** to discuss re-enrollment into our Low-Income Self-Sufficiency Plan.

Thank you for being a valued DTE customer.

Sincerely,

Your DTE Customer Service Team

20-20260831-CLA-5-0050569203CD1F D1A8F2A54C6D6B79C3

20-20260831-LSPR-5

Appendix 6-F APP Plan Conclusion Communication-Rollover Customer

Month XX, 20XX

Customer
Address Line 1
Address Line 2

Dear [Customer First Name],

Congratulations you have successfully completed the Consumers Energy CARE program. As a CARE member, you received the following benefits while enrolled:

- A portion of your energy bills were paid by CARE, totaling **$[xxx.xx]**.
- Your past due balance at the time of enrollment was paid in the amount of **$[xxx.xx]**.
    - Please be advised this program allows for up to $3,000 in arrears forgiveness, any balance exceeding that will be applied to your first bill after graduation.

To support your continued success, we recommend the following services:

- Schedule a FREE home energy assessment and learn about various energy efficiency upgrades that will help reduce your energy costs by calling 877-448-9433 or visiting ConsumersHelpingNeighbors.com.
- Change your bill due date to better fit your schedule. To qualify, you must have an upgraded electric meter on your home. Visit ConsumersEnergy.com/smartenergy.com to selectyour new bill due date.
- Enroll in Billing and Payment Alerts to receive notifications when your bill is ready, or payment is due, by visiting ConsumersEnergy.com/alerts or by calling 800-477-5050.
- Our Budget Plan provides the option to spread out your energy costs into equal monthly payments. For more information or to sign up, please visit ConsumersEnergy.com/budgetplan.

Thank you for being a valued customer and your successful participation in our CARE Program.

Sincerely,

Energy Assistance Team
ConsumersEnergy.com/assistance

[redacted] 0000000 8

DTE

Appendix 6-F Sample APP Plan Conclusion Communication – DTE Rollover

08/31/2026

H

LSBWB**T049*2*P00**********MIXED ADC 480

[redacted]

Low-Income Self-Sufficiency Plan Graduate

Account Number: [redacted]
Service Address: [redacted]

Dear [redacted]

Congratulations, you have graduated from our Low-Income Self-Sufficiency Plan!

To help make your bills more manageable moving forward, we automatically enrolled you in our BudgetWise Billing program. BudgetWise Billing allows you to pay your annual energy bill in equal monthly installments to avoid the seasonal ups and downs of your bill. Your monthly payment is calculated by averaging your energy usage and bill amount at your current residence for the last 12 months.

You will receive an enrollment letter in the mail providing more details, including your monthly plan amount. For more information about the program, please visit **dteenergy.com/bwb.**

If you choose to unenroll from BudgetWise Billing, please sign in to your online account at **dteenergy.com** and go to the My Payment Programs section of our website or call us at **(800) 477-4747.**

Thank you for being a valued DTE customer.

Sincerely,

Your DTE Customer Service Team

20-20260831-CLA-6-0050569203CD1FD1A8F2A582881339C3

Appendix 6-F Sample Pre-Plan Conclusion

October 1, 20xx

Customer
Address Line 1
Address Line 2

Dear [Customer First Name],

Congratulations you are on track to successfully complete the Consumers Energy CARE program on [Sept. XX, 20XX]. As a CARE member, you received the following benefits while enrolled in the program:

- A portion of your monthly energy bills were paid totaling **$[xxx.xx]** through your most current bill.
- Your past due balance at the time of enrollment in the amount of **$[xxx.xx]** has been forgiven.
    - Please be advised that any past due balance you had at the time of enrollment into CARE greater than $3,000 will be applied to your next bill following graduation.

To support your continued success, we recommend the following services:

- Schedule a FREE home energy assessment and learn about various energy efficiency upgrades that will help reduce your energy costs by calling 877-448-9433 or visiting ConsumersHelpingNeighbors.com.
- Apply for the Michigan Home Heating Credit (HHC) to recover some of last winter's heating costs. The applications can be submitted from January through September. You do not have to file income taxes to qualify or apply for an HHC. To find out more or to get help, dial 2-1-1 or visit MichiganFreeTaxHelp.org .
- Change your bill due date to better fit your schedule. To qualify, you must have an upgraded electric meter on your home. Visit ConsumersEnergy.com/smartenergy to selectyour new bill due date.
- Enroll in Billing and Payment Alerts to receive notifications when your bill is ready, or payment is due, by visiting ConsumersEnergy.com or by calling 800-477-5050.

Thank you for being a valued customer and your successful participation in our CARE Program.

Sincerely,

Energy Assistance Team
ConsumersEnergy.com/assistance

SIGMA Vendor Self Service – Registration Guide

Overview

This guide has been developed to provide an overview of an account setup in the SIGMA Vendor Self Service (VSS) application. You should follow this guide if:

- You have an **existing** vendor account and wish to **activate your account on this website.** If you have more than one vendor account and cannot activate your desired account, please contact the SIGMA Help Desk via the following email address: SIGMA-Vendor@michigan.gov or at the following phone number: 517-284-0540.

  OR

- You are a **new** payee or vendor that is interested in conducting business with the State of Michigan for the first time and need **to create a new payee/vendor account.**

Note: Please remember your User ID and Password when you create them as you will need them to log back into the SIGMA Vendor Self Service (VSS) application. Both the User ID and Password are case sensitive.

© State of Michigan 2023

Section 1: Begin the Registration Process

A. Select the **Sign Up** button to start the vendor registration process.

1. You may begin the registration process by selecting the **Sign Up** button located in the top right corner.

   OR

2. You may begin the registration process by selecting the **Register Your Vendor Account** link located on the carousel and then selecting the **Sign Up** button from the registration tile.

B. Enter information on the Sign Up page.

1. At a minimum, you must populate all required fields, which are marked with a red asterisk (*) on the Sign Up page. Information on some of the fields is provided below.

   - **Password** - As soon as you begin typing in the Password field, a Password Criteria pop-up appears that provides the password requirements. When a password requirement is met, a green check mark appears next to the requirement. If a password requirement is not yet met, a red x appears next to the requirement. You will not be able to continue with registration until all password requirements are met.

     A Password Grader is displayed underneath the Password field, which provides the Password strength. A password may be graded as weak, medium or strong. The Password Grader is used to encourage a secure password, but regardless of the grade given, if a Password meets all of the password requirements, it will be accepted.

   - **Confirm Password –** Re-enter the same password you entered in the Password field.

   - **Email –** An Email Verification is done as part of the registration process, to verify you're entering a valid email address that you can access. After you finish typing a valid email address in the Email field, a Send Email Verification Code to your Email button appears. After selecting this button an email is immediately sent to the email entered in the Email field and a Confirmation window appears indicating that the email was sent successfully. Select Continue and then copy the Verification Code from the email message and paste it into the Email Verification Code field. If the Verification Code is correct a green check mark will

© State of Michigan 2023

appear. If the Verification Code is incorrect a red x will appear. You will not be allowed to proceed with the registration process until the Verification Code has been entered correctly.

If an email is not received, after selecting the Send Email Verification Code to your Email button, then please verify you have entered your email correctly. If entered correctly, you should also check your junk mail folder. If you still do not see the email, then select the Resend Email Verification Code to Your Email Address button. This will send another verification code email. If no email is received, please contact the Help Desk.

NOTE:

- Please remember the User ID and Password, because you will need them to log back into the SIGMA Vendor Self Service (VSS) application.
- After the Sign Up page, the Registration process is saved after every step, so if you lose your session or close your browser, you can return to where you left off by signing back in with your User ID and Password.

2. Click the **User Agreement Policy** link to view the policy statement. At the bottom of the page, click the check box next to – **I agree with User Agreement Policy –** to confirm that you have read and agree with the policy.
3. Select **Sign Up** to continue.
4. The *Completed: User Sign Up* window appears, which provides an overview of the next steps.
5. Select **Continue** to proceed.

© State of Michigan 2023

Section 2: Search for an Existing Account

This search page helps you determine if you have an existing vendor account. If there is an existing vendor account that has not been activated yet, you will have the option to activate the already existing vendor instead of creating a new one. If no vendor account exists, you will then proceed with a new registration.

A. Initiate the Search Process

1. To initiate the search process, you will choose to search by **Company** or by **Individual**, depending on your type of business. The distinction between these two is that a Company's Taxpayer Identification is generally their **Federal Employer Identification Number (EIN)**, whereas an Individual's Taxpayer Identification Number is his/her **Social Security Number (SSN)** or alternative identifier.
    a. If Company has been selected enter the **Taxpayer Identification Number** or the **Legal Business Name** and select **Search.**
    b. If **Individual** has been selected, enter the **Last Name** and the **Last 4 Digits of SSN** and
2. Click **Search.**
    a. If no record has been found, click New Registration, and proceed with registering a new vendor, then continue onto Section 3: Registration.
    b. If a record has been found for a Vendor that is not activated and you would like to activate that vendor, select the Vendor from the grid, and then select **Activate Your Account.**

        NOTE:
        If you choose to **Activate** an already existing Vendor, bypass Section 3: Registration and proceed to Section 4: Activating a Vendor.

© State of Michigan 2023

Section 3: Registration

Registration is a four-step process, from this point forward you may, select **Save and Close** and exit out of the browser. All information will be saved for you to continue with the registration at a different time. If you have any questions or need assistance, then select **Submit Question** at the top of the page. If you no longer wish to create an account and want to discard the information provided, then select **Cancel Registration** at the top of the page.

NOTE: This process includes a **dynamic display** where the information required is determined by the information populated as the form is filled out. Certain fields may appear or disappear depending on the values entered. To reduce repetitive manual entry, certain values entered on previous pages, will infer to the current step, and can be updated or changed as needed.

A. Enter Account Information

1. At a minimum, you must populate all required fields, which are marked with a red asterisk (*) on the Account Information page. Additional information is provided below:
    - **Organization Type –** Select whether you are registering as a company or as an individual. The distinction between these two is that an Individual's Taxpayer Identification Number is his/her Social Security Number (SSN) or alternative identifier, whereas a Company's Taxpayer Identification is generally their Federal Employer Identification Number (EIN).
    - **1099 Classification –** Select the "Entity Type" you provided on your W-9 form. You must select from the available classifications in the list provided. Some examples of Classification are Individual, Profit Corporation, Partnership, and so forth. If you have an SSN for your W-9 Tax ID, your Entity Type is Individual. If you have an EIN, you may fall under any of the other Entity Types provided.
    - **Taxpayer ID Number Type –** Select SSN/ITIN/ATIN if registering as an individual or select EIN if registering as a company. The IRS recognizes the following types of TIN:
        - Employer Identification Number (EIN),
        - Social Security Number (SSN),
        - Individual Taxpayer Identification Number (ITIN)
        - Adoption Taxpayer Identification Number (ATIN).
    - **Detailed TIN Type –** This field appears if you selected SSN/ITIN/ATIN as the Taxpayer ID Number Type. Select a valid value.
    - **Taxpayer ID Number** - Enter the number associated with your Taxpayer

© State of Michigan 2023

Identification Type in the Taxpayer ID Number.

- **Healthcare Provider** – Select **Yes** if you are a Healthcare Provider. Select No if you are not a Healthcare Provider.

  Note: A health care provider is an individual health professional, or a health facility organization licensed to provide health care diagnosis and treatment services.

- **Tax Return Address** - Enter the address associated with the Taxpayer Identification Number used for 1099 reporting purposes. This should match what is indicated on your W-9 form.
- **EFT Information –** This section only appears if you selected **No** for Healthcare Provider and is available to enter banking information (but not required). Healthcare Providers must complete the Financial Institution Information section.
- **The Healthcare Provider EFT Enrollment** sections are used to enter information required by Federal Law specifically for healthcare providers enrolling in EFT. If you are choosing to enroll in EFT as part of your registration, you should fill out the Financial Institution Information section.

2. Select **Continue** to transition to the Address Information step of the registration process.

B. Enter Address Information

1. At a minimum, you must populate all required fields, which are marked with a red asterisk (*) on the Address Information page. Additional information is provided below:

   - **Primary Address –** By default, the Tax Return Address provided as part of the Account Information step is populated as the Primary Address and is used as the Ordering, Payment, and Billing address. However, you can change each address by clearing the appropriate check box and entering a different address.
     - The Administrative Address tells us where the main administrative functions for your organization take place besides Ordering, Payment, and Billing.
     - The Ordering Address tells us where a department may send orders. These would include purchase orders and contract information.
     - The Payment Address tells us where to send your payments.
     - The Billing Address tells us where to send information for any payment you may owe us.

© State of Michigan 2023

Note: During registration you can only enter one address per Address Type; however, once your activation is completed, you can add additional addresses via My Account after logging into VSS.

- **Primary Contact** – By default, the contact provided during the Account Information step is **populated** as the Principal Contact for the Ordering, Payment, and Billing address. You can change the contact information by clearing the appropriate check box and entering a different address.

2. Click **Continue** to proceed.

C. Enter Business Information

1. At a minimum, you must populate all required fields, which are marked with a red asterisk (*) on the Business Information page. Information on some of the fields is provided below:

   - **Location Verification** - This section allows you to set the verification method by which your organization can claim additional accounts . For example, if one of your locations wanted to also register and link their account to yours, they would first have to input the correct verification information established here. Verify My Locations by allows you to select Create My Own and decide what will be used for the verification information.
   - **Organization Information** - There are no required fields within this section, though the more information you provide for our Purchasing Department will help to identify you for any forthcoming business opportunities.
   - **Commodities** - Adding the appropriate commodities to your company's profile ensures you are kept up to date on business opportunities that might apply to your organization. You will automatically be notified about published solicitations and business opportunities based on the commodities that your account has registered for and that you have chosen in this section.
   - **Business Types** - This information is used to indicate specific information about your organization. It's important to enter all applicable business types because they help establish your eligibility for various programs. (Michigan Principal Location, Qualified Opportunity Zone by Principal Location, HUBZone Business. Etc.)
   - **Service Areas** - Buyers may choose to notify all vendors registered for a specific Service Area about a solicitation being published. Therefore, you should register for specific service areas that are applicable to your business.
   - **Attachments** - Supporting Documentation and Files can be added to your company's profile to provide additional information and documents associated with your vendor account. Adding attachments to your account enables you to

© State of Michigan 2023

store and track all supporting vendor documents directly in the application and alleviates the need to fax or mail supporting documentation to the supporting agency.

- **Discount Information** - The Discount Information section should be populated if your business offers discounts for the prompt payment of invoices.
    - Number of Days 1, Number of Days 2, Number of Days 3, and Number of Days 4 - The maximum number of days that can elapse between the voucher date and check date and still have the discount apply.
    - Discount Percent 1, Discount Percent 2, Discount Percent 3, and Discount Percent 4 – Enter the percentage of credit received when payment is received within the specified number of days in the corresponding Number of Days 1 field.

      For example, if your business offers a 2% discount for payments within 10 days and 1% discount for payments within 15 days, enter:

      - Number of Days 1: 10
      - Discount Percent 1: 2.00
      - Number of Days 2: 15
      - Discount Percent 2: 1.00

2. Select **Continue** to proceed.

D. Summary Information

1. Review all information and verify it is correct.
2. Select **Edit** next to any section where you need to make changes.
3. Click **Print Summary** to print a copy for your records. This is not required.
4. Once all information is correct, select **Submit Registration**.

E. Confirmation

1. After reviewing the W-9-Form Certification statement, check **I Accept** on the perjury statement. Registrations for foreign vendor will see the W-8-form Certification section.
2. Select **Submit** to complete registration.

F. Congratulations

© State of Michigan 2023

After successfully submitting your registration, you are taken to a Congratulations page.

1. Copy the **Vendor Code** listed on this page, so you can reference it in the future.
2. Click the **Print** button to print this page, which includes your Vendor Code.
3. Click the **Go to Homepage** button to navigate to the homepage in the VSS application. Refer to page help for information about the Vendor Self Service application.

© State of Michigan 2023

Section 4: Activating a Vendor

If there is already a vendor record in the system that you would like to activate, follow the steps below:

A. Select the Record
   1. Select the Vendor record you wish to activate.
   2. Select **Activate Your Account** from the **three-dot menu** for your vendor.

B. Account Verification

   Your existing account will have a Verification Password associated with it, which is a custom password assigned to your account. Instructional text at the top of the page will explain what verification password needs to be entered.

   Before activating an existing account, an Activation Code must be requested and entered. After entering a properly formatted email address, a Request Activation button appears.

   Note: By default, the email address field is populated with the email address entered and verified on the sign- up page. However, you can change the email address to a different value. After selecting the Request Activation button, based on your site's settings, one of the following occurs:

   - When the email matches an existing contact, an email is immediately generated and sent to the email address you entered along with the Activation Code.

     OR

   - You are taken to a Request Activation Code page where additional information is entered/verified and then after selecting Submit, an email is sent to an administrator to approve your activation request. The verification process can take a number of days, based on the site's approval process. Once approved, an email is sent to the email address you provided with an Activation Code.

   After entering a valid email address and the valid Activation Code sent to your email, the **Activate Account** button navigates you to the Account Verification page for the Existing User.

   Note: SIGMA limits the number of attempts a user has to enter the correct Activation Code. If the number of unsuccessful attempts reaches the limit the system will end the user's current session. The user must request a new activation code again.

C. User Information Verification

© State of Michigan 2023

Please review that your user information provided is correct. You may update any information that is not correct at this time.

1. Select **Verify** located in the top right corner to complete the activation process and be taken to the Vendor Homepage.

© State of Michigan 2023

APPENDIX 7-B HOURLY EMPLOYEE TIMESHEET EXAMPLE - Minimum Requirements for MEAP

Hourly Employee: _____
Employee's Signature: _____

MEAP Grant No: _____
Month/Year: _____

Payroll Period(s) – From: _____
Payroll Period(s) – To: _____

Day of the Month	Hours Worked - State Funded MEAP Grant (Administrative)	Hours Worked - State Funded MEAP Grant EAP	Hours Worked Federal - Funded Assurance 16	Description of Activity only needed for MEAP Grant Assurance 16 Services	Paid Time Off (PTO) according to Organization's policy	Hours Worked Non-MEAP	Overtime Hours Worked Non-MEAP	Total Hours Worked
1								
2								
3								
4								
5								
6								
7								
8								
9								
10								
11								
12								
13								
14								
15								
16								
17								
18								
19								
Total								

Required Authorized Signature:

APPENDIX 7-C SALARIED EMPLOYEE TIMESHEET EXAMPLE -Minimum Requirements for MEAP

Salaried Employee: _____ MEAP Grant No: _____ Payroll Period(s) – From: _____

Employee's Signature: _____ Month/Year: _____ Payroll Period(s) – To: _____

Day of the Month	% of Time Worked - State Funded MEAP Grant (Administrative)	% of Time Worked - State Funded MEAP Grant EAP	% of Time Worked - Federal Funded Assurance 16	Description of Activity only needed for MEAP Grant Assurance 16 Services	Paid Time Off according to Organization's policy	% of Time Worked Non-MEAP Grant	Total % of Time
1							
2							
3							
4							
5							
6							
7							
8							
9							
10							
11							
12							
13							
14							
15							
16							
17							
18							
19							
Total							

Required Authorized Signature:

APPENDIX 7-D EXAMPLES OF ALLOWABLE A16 SERVICES

ACTIVITY	ASSURANCE 16 & Self-Sufficiency Services	ADMINISTRATIVE/ PROGRAM COST
Managing, planning, and budgeting for energy assistance program		X
Supervising intake staff		X
Determining household's crisis status		X
Calculating the household's benefit amounts		X
Energy vendor intervention on behalf of clients	X	X
Assist in setting up utility payment arrangements	X	X
Assessing client's need for agency services & referral	X	X
Weatherization needs assessment & referral	X	X
Referral to other sources of utility assistance	X	X
Cost of household energy kit with counseling	X	X
One-to-one energy education with household	X	X
Budget counseling related to energy cost budget	X	X
Program public information, brochures, materials		X
Operation of outreach application sites		X

Caseworker Daily Time Sheet *(tracked in ¼ hour segments)*	ASSURANCE 16 & Self- Sufficiency Services	ADMINISTRATIVE/ PROGRAM COST
Taking application for energy assistance (MDHHS)		3:30
Determining household's crisis status (MDHHS)		0:30
Calculating the household's benefit amounts (MDHHS)		1:00
Intervening with an energy company to maintain service	0:15	
Assisting in setting up utility payment arrangements (including APPs)	0:30	
Referring family to other sources of assistance	0:15	
Assessing the family's need for Weatherization	0:15	
Educating family on use of energy kit materials	0:00	
Delivering energy education to the family	0:00	
Counseling family on energy cost budgeting	1:00	
Providing program brochures, outreach materials		0:15
Staffing an outreach application site		0:00
TOTAL	**2:15**	**5:15**

DEPARTMENT OF TECHNOLOGY, MANAGEMENT & BUDGET,
VEHICLE AND TRAVEL SERVICES
SCHEDULE OF TRAVEL RATES FOR CLASSIFIED AND UNCLASSIFIED EMPLOYEES
FY 2026 – Effective July 1, 2026

MICHIGAN SELECT CITIES*

	Individual	Group Meeting (pre-arranged and approved)
Lodging**	$98.00	
Breakfast	$14.00	$17.00
Lunch	$16.00	$19.00
Dinner	$31.00	$34.00

MICHIGAN IN-STATE ALL OTHER

	Individual	Group Meeting (pre-arranged and approved)
Lodging**	$98.00	
Breakfast	$12.00	$15.00
Lunch	$14.00	$17.00
Dinner	$27.00	$30.00
Lodging	$66.00	
Breakfast	$12.00	
Lunch	$14.00	
Dinner	$27.00	
Per Diem Total	**$119.00**	

OUT-OF-STATE SELECT CITIES*

	Individual	Group Meeting (pre-arranged and approved)
Lodging**	Contact FROSCH Travel	
Breakfast	$22.00	$25.00
Lunch	$23.00	$26.00
Dinner	$36.00	$39.00

OUT-OF-STATE ALL OTHER

	Individual	Group Meeting (pre-arranged and approved)
Lodging**	Contact FROSCH Travel	
Breakfast	$16.00	$19.00
Lunch	$19.00	$22.00
Dinner	$28.00	$31.00
Lodging	$66.00	
Breakfast	$16.00	
Lunch	$19.00	
Dinner	$28.00	
Per Diem Total	**$129.00**	

Incidental Costs Per Night: $5.00

Mileage Rates	Current
Premium Rate	$0.76 per mile
Standard Rate	$0.47 per mile

Reimbursable Meal	Travel Begins Before	Travel Extends Past
Breakfast	6:00 a.m.	8:30 a.m.
Lunch	11:30 a.m.	2:00 p.m.
Dinner	5:30 p.m.	8:00 p.m.

* See Select Cities Listing
** Lodging available at State rate, or call FROSCH Travel at 877-654-2179 or www.concursolutions.com

SELECT CITY LIST
SCHEDULE OF TRAVEL RATES FOR CLASSIFIED AND UNCLASSIFIED EMPLOYEES
Effective October 1, 2025

Michigan Select Cities/Counties		
	CITIES	**COUNTIES**
	Ann Arbor, Auburn Hills, Beaver Island, Detroit, Grand Rapids, Holland, Leland, Mackinac Island, Midland, Muskegon, Petoskey, Pontiac, South Haven, Traverse City	Grand Traverse, Oakland, Wayne
Out of State Select Cities/Counties		
STATE	**CITIES**	**COUNTIES**
Alaska	All locations	
Arizona	Phoenix, Scottsdale, Sedona	
California	Antioch, Arcata, Barstow, Belmont, Concord, Eureka, Foster City, Fresno, Gualala, Mammoth Lakes, McKinleyville, Mill Valley, Monterey, Napa, Novato, Oakland, Ontairio, Palm Springs, Palo Alto, Point Arena, Sacramento, San Diego, San Francisco, San Jose, San Luis Obispo, San Mateo, San Rafael, Santa Barbara, Santa Cruz, Santa Monica, Santa Rosa, South Lake Tahoe, Sunnyvale, Tahoe City, Truckee, Victorville, Yosemite National Park	Los Angeles, Mendocino, Orange, Ventura
Colorado	Aspen, Aurora, Breckenridge, Colorado Springs, Crested Butte, Denver, Grand Lake, Gunnison, Silverthorne, Steamboat Springs, Telluride, Vail	
Connecticut	Bridgeport, Danbury, Groton, New London	
District of Columbia	Washington DC (See also Maryland & Virginia)	
Florida	Boca Raton, De Funiak Springs, Delray Beach, Ft Lauderdale, Fort Walton Beach, Jupiter, Key West, Miami, Sarasota	
Georgia	Atlanta, Brunswick, Jekyll Island	
Hawaii	All locations	
Idaho	Boise	
Illinois	Chicago, East St. Louis, Fairview Heights, O'Fallon	Cook, Lake
Kentucky	Kenton	
Maine	Bar Harbor, Kennebunk, Kittery, Rockport, Sandford	
Maryland	Baltimore City, Columbia	Montgomery, Prince George
Massachusetts	Boston, Burlington, Cambridge, Falmouth, Hyannis, Martha's Vineyard, Nantucket, Pittsfield, Woburn	Suffolk
Minnesota	Duluth, Minneapolis, St. Paul	
Missouri	St. Louis	
Nevada	Las Vegas	
New Jersey	Eatontown, Freehold, Newark, Princeton, Trenton	
New York	Albany, Floral Park, Garden City, Glens Falls, Great Neck, Kingston, Lake Placid, Melville, New Rochelle, New York City, Riverhead, Ronkonkoma, Tarrytown, White Plains	Bronx, Kings, Queens, Richmond, Suffolk
Ohio	Cincinnati	
Oregan	Bend, Lincoln City, Portland, Seaside	
Pennsylvania	Philadelphia	
Puerto Rico	All locations	
South Carolina	Charleston	
Tennessee	Brentwood, Franklin, Nashville	
Utah	Moab, Park City	
Vermont	Burlington, Manchester, Stowe, White River Junction	
Virginia	Alexandria, Fairfax, Falls Church	Arlington, Fairfax
Washington	Everett, Lynnwood, Ocean Shores, Pasco, Port Angeles, Port Townsend, Richland, Seattle, Spokane, Tacoma, Vancouver	
Wyoming	Jackson, Pinedale	

APPENDIX 7-F SAMPLE MILEAGE/TRAVEL LOG

DAILY TRAVEL LOG
Grant No. PSC-27-XX

Period of Travel From: ____________________ To: ____ MEAP Staff:

Please complete all fields for each trip. Destination must include street address & city.

I certify that all mileage reported was driven for official MEAP grant business only.

TRAVEL DATE	TRAVEL TIMES		TRIP ODOMETER READING		DAILY TOTAL	MILEAGE	RENTAL CAR	OVER NIGHT STAY (YES/NO)	Starting Location (Complete Address)/ Ending Location (Complete Address)	REASON FOR TRAVEL
	START	END	START	END		(Daily Total x .470)	(See Expenditure Guidelines equal to miles traveled x .470)			
10/1/2027	6:00 AM	8:30 PM	11125	11485	360	169.2	$250	Yes	To and From Locations	Meeting
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
					0	0			To and From Locations	
			Total:		0	0	0		AUTHORIZED (Signature):	

APPENDIX 8-A FINANCIAL STATUS REPORT

C-108 (8/26)

FEDERAL FINANCIAL STATUS REPORT AND/OR PAYMENT REQUEST

Authorized by P.A. 380 of 1965, as amended, and appropriations approved by the Legislature. Completion is required for payment.

1. Name and Address of Vendor Organization	2. Agency (Bureau, Commission or Authority)	3.a Grant or Contract Number	3.b. Grants Given Document Number
Grantee Name Address	Michigan Public Service Commission	PSC-27-xx	GG 27*xxx
	4. Project Title: Michigan Energy Assistance Program Grant	5. Final Report ___ YES x NO	6. FSR/Payment Request #
		7. Duration of Contract/Grant From: 10/01/2026 TO: 9/30/2027	8. Current Report Period From: To:

9. Cost Categories (salary, fringes, equipment, etc.)	EAP Supplies, Materials, and Equipment - Assurance 16 *(Federal)*	EAP Other - Assurance 16 *(Federal)*				Total
a. Expenditures Previously Reported						0
b. Expenditures this Report Period						0
c. Expenditures to Date (line a. plus line b.)	0	0				0
d. Non-Federal Expenditures to Date						
e. Federal Share of Expenditures (line c. minus line d.)	0	0				0
f. Total Federal Funds Authorized						**0.00**
g. Unexpended Balance of Federal Funds	0.00	0.00				0.00
10. Request for Reimbursement or Advance						
h. Federal Share of Expenditures to Date (from line e. above)						0
i. Total Amount of Federal Advances Previously Requested and/or Received						
j. Advance Balance (line i. minus line h.)						
k. Request Advance						
l. Request Reimbursement (if applicable, line h. minus line i.)						
11. For State Use Only						

12. Remarks	13. Certification: I certify that to the best of my knowledge and belief this report is correct and complete and that all expenditures are for the purposes set forth in the grant award/contract documents.	14. Agency Approval
Authorized Funds: *Federal Funds:* *$0.00* *Unexpended Balance:* *Federal Funds:* *$0.00*		Program Manager's Signature Date
	Signature Date:	Finance Manager's Signature Date

C-108 forms are tailored for each grantee based on their approved budget categories and will be distributed individually.

C-108 (8/26)

STATE FINANCIAL STATUS REPORT AND/OR PAYMENT REQUEST

Authorized by P.A. 380 of 1965, as amended, and appropriations approved by the Legislature. Completion is required for payment.

1. Name and Address of Vendor Organization	2. Agency (Bureau, Commission or Authority)	3.a. Grant or Contract Number	3.b. Grants Given Document Number
Grantee Name Address	Michigan Public Service Commission	PSC-27-xx	GG 27*xxx
	4. Project Title: Michigan Energy Assistance Program Grant	5. Final Report ___YES x NO	6. FSR/Payment Request #
		7. Duration of Contract/Grant From: 10/01/2026 TO: 9/30/2027	8. Current Report Period From: To:

9. Cost Categories (salary, fringes, equipment, etc.)	Administrative Personnel	Administrative Travel	EAP Personnel Program Staff	EAP Supplies, Materials, and Equipment	EAP Contractual Services	EAP Travel	Direct Assistance	Indirect Costs		Total
a. Expenditures Previously Reported										0.00
b. Expenditures this Report Period										0.00
c. Expenditures to Date (line a. plus line b.)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		0.00
d. Non-State Expenditures to Date										
e. State Share of Expenditures (line c. minus line d.)	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		0.00
f. Total State Funds Authorized			**0.00**	**0.00**	**0.00**	**0.00**	**0.00**			**0.00**
g. Unexpended Balance of State Funds	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00		0.00
10. Request for Reimbursement or Advance										
h. State Share of Expenditures to Date (from line e. above)										0.00
i. Total Amount of State Advances Previously Requested and/or Received										
j. Advance Balance (line i minus line h.)										*0.00*
k. Request Advance										
l. Request Reimbursement (if applicable, line h. minus line i.)										
11. For State Use Only										

12. Remarks	13. Certification: I certify that to the best of my knowledge and belief this report is correct and complete and that all expenditures are for the purposes set forth in the grant award/contract documents.	14. Agency Approval
Authorized Funds: *State Funds:* *$0.00* *Unexpended Balance:* *State Funds:* *$0.00*	Signature Date	Program Manager's Signature Date Finance Manager's Signature Date

APPENDIX 8-B MEAP LOGIC MODEL

Goal [Problem]	FY 26 Strategy	Strategy for FY 27	Outputs	Short-Term Outcomes	Intermediate Outcomes	Long-Term Outcomes
Provide energy assistance to income-qualified households. [Need for affordable energy and stop-gap measures for crises.] MCL - Act 615 of 2012, MCL - Section 400.1232 Sec. 2 (f)	Offer as needed assistance and Affordable Payment Plans	Standardize benefit matrix foundations for improved home energy security and APP expansion to additional utilities	a) Households receive as-needed assistance b) Households enroll in Affordable Payment Plans	a) Households have energy service restored b) Households have energy crisis resolved c) Households avert energy crisis	a) Households have reduced energy burden b) Households experience home energy security	a) A reduction in shut-offs for the income-eligible population. b) A reduction in the duration of shut-offs for the income-eligible population.
Prioritize vulnerable populations for energy assistance. [Funds are limited, some customers have greater challenges with accessibility and system navigation, and some populations are more vulnerable to economic factors and to high and low temperatures.] MCL - Section 400.1233 Sec. 3 (3)	Use of categorical eligiblity sources that serve vulnerable populations	Use of categorical eligibility sources that serve many vulnerable households combined with priority processing and undergirded by priority outreach.	a) Triage methods address vulnerable households b) Vulnerable households are identified, processed accordin to the acuity of crisis and then the vulnerability of the household, and provided outreach c) Vulnerable households receive services	a) Greater percentages of MEAP funding are directed toward vulnerable households b) Greater numbers of vulnerable households receive MEAP	a) Greater numbers of vulnerable households have reduced energy burden b) Greater numbers of vulnerable households experience home energy security	a) Even greater numbers of vulnerable households have reduced energy burden b) Even greater numbers of vulnerable households experience home energy security c) Households experience energy security for greater lengths of time
Include services to assist low-income households in becoming or moving toward becoming self-sufficient and reducing energy insecurity. [Self-sufficiency and energy security are complex constructs, and support through services is often beneficial to attaining these household goals.] MCL - Section 400.1233 Sec. 3 (3)	Implement self-sufficiency services guidelines	Include self-sufficiency services in performance metrics	EAS and A16 self-sufficiency services are provided to MEAP applicants	a) Immediate crises are resolved for applicants b) Applicants access periferal resources to meet immediate needs c) Applicants increase knowldege and skills around financial management and energy conservation	a) Applicants experience greater self-sufficiency b) Applicants experience greater home energy security	Energy assistance supports improvements in population health and economic stability
Ensure that all money collected for the fund from a geographic area is returned, to the extent possible, to that geographic area. [Constituents have concerns about funding being redirected outside of their communities and service areas.] MCL - Section 460.9t (5)	Analyze geographic distribution and consider data in fund distribution	Incorportate requests to serve geographic areas into RFP process and allocate funding based on geographic area	a) Fund distribution is analyzed b) Funds are distributed considering the geography from which funds were collected	a) Some geographic areas receive a greater percentage of funding than in prior years b) Some geographic areas receive a lesser percentage of funding than anticipated	Administrators gain a greater understanding of the geographic presentation of need than previously	Fund distribution better reflects geographic contributions and need
Ensure the fund is administered to promote Statewide access to the Michigan energy assistance program. [As a State of Michigan Program, funds need to be available to customers state-wide; some areas of the state are not as well-covered with services.] MCL - Section 460.9t (5)(a)	Collect data on geographic areas served and compare to Census ACS data on income eligible populations and vulnerable populations	Continue data collection and comparision, address areas of concern and address accessibility in RFP process	a) Data is collected by geography and compared to Census data b) Funding allocations are made considering geographic distribution c) Accessibility considered in the grant allocation process	a) The number of grantees may increase to address geographic distribution b) Accessibility for applicants may increase c) MPSC may see an increased need for communication	a) Data monitoring provides insight into geograaphic coverage b) Accessability concerns are monitored and addressed c) Outreach is conducted as a result of learnings from data monitoring	Customer assistance data demonstrates evidence of state-wide access to LIEA Funds.

Ensure the fund is administered to promote Collaboration between the department of health and human services, the commission, energy providers, and entities that administer assistance programs to ensure that eligible low-income customers in a geographic area are receiving funds proportional to what customers in that geographic area are being assessed. [Concerns about lack of equity in fund distribution.] MCL - Section 460.9t (5)(b)	Continue collaboration in MEAP Workgroup	Regional convenings to build collaboration and educate on MEAP services.	a) MEAP workgroups are held and facilitated b) Regional meetings are organized and held c) Agendas include data on geographic distribution	a) Collaboration is facilitated b) Meeting cadences may change c) Workgroup participants may expand d) Workgroup agendas will be impacted e) Workgroup cultures may be impacted positiviely or negatively	Any changes in grantees/ providers are more easily intregrated into the collaborative system via regional approach	Customer assistance data as compared to LIEAF contribution data demonstrates proportionality in distribution.
Ensure the fund is administered by entities that administer assistance programs as well as energy providers to promote education and outreach on availability of the assistance programs and funding. [Concerns that there are customers in need who are not being reached.] MCL - Section 460.9t (5)(c)	Facilitated MEAP Outreach and Communication Sessions. Provision of MPSC MEAP resources and materials	Monitor data and consider addressing in regional group meetings	a) Collaborative workshops are held b) Materials are created and shared	a) Education and outreach receive greater attention than in past years b) Strategies for education and outreach may shift	Improved data tracking facilitates targeted interventions & strategic scaling of successful approaches	There is anecdotal and/or survey evidence that income-qualified households, particularly those with vulnerable household members, are aware of the availability of MEAP funding.

APPENDIX 8-C INTERIM PROJECT STATUS REPORT

Interim Project Status Data Report (2027)

Project Identification

Grantee Name:	
Grantee Number:	
Reporting Period:	October 1, 2026– March 31, 2027
Grant Term:	October 1, 2026 – September 30, 2027

Project Milestones

Provide the number of unduplicated households or total amounts, including percent to projections where indicated. Please only include the number/amount for the response and not any narrative in this section. Any details about the milestones should be reported in the Project Progress section.

a. Number of households served and percent to projected households served (direct energy assistance):

# of HH served:	
% to projected:	

b. Number of households served and percent to projected households served (self-sufficiency):

MEAP # of HH served:	
MEAP % to projected:	
LIHEAP # of HH served:	
LIHEAP % to Projected:	

c. Number of unduplicated households served and percent to projected households served (any type):

# of HH served:	
% to projected:	

d. Amount of direct energy assistance funding spent and percent to projected assistance (C-108-line 9e, Direct Assistance column):

Funding $:	
% to projected:	

e. Amount of grant funds spent (C-108 line 10h):

State $:	
Federal $:	

f. Number of unduplicated households served by county (Complete table below beginning on row 31)

g. Assistance dollars distributed by county (Complete table below beginning on row 31)

County	MEAP # of unduplicated households	LIHEAP # of unduplicated households	Assistance $ distributed
ALCONA			
ALGER			
ALLEGAN			
ALPENA			
ANTRIM			
ARENAC			
BARAGA			
BARRY			
BAY			
BENZIE			
BERRIEN			
BRANCH			
CALHOUN			
CASS			
CHARLEVOIX			
CHEBOYGAN			
CHIPPEWA			
CLARE			
CLINTON			
CRAWFORD			
DELTA			
DICKINSON			
EATON			
EMMET			
GENESEE			
GLADWIN			
GOGEBIC			
GRAND TRAVERSE			
GRATIOT			
HILLSDALE			
HOUGHTON			
HURON			
INGHAM			
IONIA			
IOSCO			
IRON			
ISABELLA			
JACKSON			
KALAMAZOO			
KALKASKA			
KENT			
KEWEENAW			
LAKE			

LAPEER			
LEELANAU			
LENAWEE			
LIVINGSTON			
LUCE			
MACKINAC			
MACOMB			
MANISTEE			
MARQUETTE			
MASON			
MECOSTA			
MENOMINEE			
MIDLAND			
MISSAUKEE			
MONROE			
MONTCALM			
MONTMORENCY			
MUSKEGON			
NEWAYGO			
OAKLAND			
OCEANA			
OGEMAW			
ONTONAGON			
OSCEOLA			
OSCODA			
OTSEGO			
OTTAWA			
PRESQUE ISLE			
ROSCOMMON			
SAGINAW			
SAINT CLAIR			
SAINT JOSEPH			
SANILAC			
SCHOOLCRAFT			
SHIAWASSEE			
TUSCOLA			
VAN BUREN			
WASHTENAW			
WAYNE			
WEXFORD			

Eligibility Determination

a. Number of households receiving SER:

b. Number of households determined categorically eligible using a program other than SER:

Home Heating Credit:	
SNAP:	
TANF:	
SDA:	
WIC:	
Head Start:	
SSI:	

c. Number of households for whom income was validated by the grantee:

d. Total households whose eligibility was determined:

Household Metrics

Provide the number of unduplicated households for each item. Please only include the number for the response and not any narrative in this section. Any details about the metrics should be reported in a narrative section (Assurance 16, Project Progress, Noteworthy Accomplishments, etc.).

a. Number of unduplicated households that presented for MEAP Self-Sufficiency Services:

b. Number of unduplicated households that presented for LIHEAP Assurance 16 Services:

c. Number of unduplicated households that received any type of MEAP Self-Sufficiency services (this number should match response *b.* in the Project Milestones section.):

d. Number of unduplicated households that received any type of LIHEAP Assurance 16 services (this number should match response *b.* in the Project Milestones section.):

e. Number of unduplicated households served with Vendor Advocacy Type 1 - Non-App:

MEAP:	
LIHEAP:	

f. Number of unduplicated households served with Vendor Advocacy Type 2 - New APP Enrollment:

MEAP:	
LIHEAP:	

g. Number of unduplicated households served with Vendor Advocacy Type 3 - APP Reverification:

MEAP:
LIHEAP:

h. Number of unduplicated households served with Needs Assessment/Referral:
MEAP:
LIHEAP:

i. Number of Budgeting Services Type 1: Financial discussions held:
MEAP:
LIHEAP:

j. Number of Budgeting Services Type 2: Budget review provided:
MEAP:
LIHEAP:

k. Number of Budgeting Services Type 3: Budget counseling sessions held:
MEAP:
LIHEAP:

l. Total number of unduplicated households served with Budgeting Services:
MEAP:
LIHEAP:

m. Number of Energy Conservation Services Type 1: Energy savings discussions held:
MEAP:
LIHEAP:

n. Number of Energy Conservation Services Type 2: Conservation resources provided to households:
MEAP:
LIHEAP:

o. Number of Energy Conservation Services Type 3: Energy education courses attended:
MEAP:
LIHEAP:

p. Number of Energy Conservation Services Type 4: Weatherization referrals confirmed:
MEAP:
LIHEAP:

q. Total number of unduplicated households served with Energy Conservation Services:
MEAP:
LIHEAP:

r. Number of unduplicated households served with Short-term Case Management:
MEAP:
LIHEAP:

s. Number of unduplicated households served with Long-term Case Management:
MEAP:
LIHEAP:

Program Metrics

a. Provide the number of households enrolled during this reporting period by your agency in any Affordable Payment Plan:

Metric	Consumers Energy CARE	DTE Energy LSP	Great Lakes Energy	SEMCO Energy MAP	UPPCO EASE
HH Enrolled FY 2025					
HH Enrolled FY 2026					
HH Enrolled FY 2027					
HH Successful*					
HH Removed**					

**A successful household would be a household that remained actively enrolled in the APP and was active at the end of the fiscal year (or until the end of the program if enrollment ended mid-year).*

**Include households that were removed from the program during the reporting period for any reason other than moving out of the service territory or successful completion of the program.

b. Provide the number of households enrolled during this reporting period by your agency in the Home Energy Security Allowance (HESA):
2 year 4 year

c. Provide the total dollars spent in providing HESA Direct Payment Assistance:

Vulnerable Households

a. Number of households with a child under 5 years of age at time of application.

b. Number of households with an individual with a disability.

c. Number of households with an individual age 60 or older at the time of application.

d. Number of households with an individual who has experienced homelessness in the preceding 12 months and who needs energy assistance to secure housing.

e. Number of unduplicated households identified as including an individual from a vulnerable population.

Interim Project Status Narrative Report | 2027

Project Identification

Grantee Name:

Grant Number:

Reporting Period: October 1, 2026 – March 31, 2027

Grant Term: October 1, 2026 – September 30, 2027

Project Progress

Provide a brief outline of the work accomplished during the reporting period and the work to be completed during the subsequent reporting period(s). Include progress toward timeline objectives.

Click or tap here to enter text.

Assurance 16

Describe how you have used LIHEAP funds to provide Assurance 16 services during this reporting period.
Click or tap here to enter text.

Noteworthy Accomplishments

Identify and describe any milestones reached or noteworthy accomplishments completed during the period.

Click or tap here to enter text.

Delays

Provide a brief description of problems or delays, real or anticipated, which should be brought to the attention of the Grant Administrator.

Click or tap here to enter text.

Project Deviations

State any significant deviation from the previously agreed-upon work plan developed in Part V: Information Required from Applicant. Include information about any Grant Amendments in this section.

Click or tap here to enter text.

Attachments and Other Materials

Provide project materials developed and implemented during the reporting period (e.g. newspaper articles, newspaper advertisements, forms, brochures, announcements, studies, reports, analyses, audits, etc.). In this section, also feel free to provide any customer feedback received during the reporting period.

Click or tap here to enter text.

APPENDIX 8-D FINAL PROJECT STATUS REPORT

Final Project Status Data Report (2027)

Project Identification

Grantee Name:	
Grantee Number:	
Reporting Period:	October 1, 2026– September 30, 2027
Grant Term:	October 1, 2026– September 30, 2027

Project Milestones

Provide the number of unduplicated households or total amounts where indicated. Please only include the number/amount for the response and not any narrative in this section. Any details about the milestones should be reported in the Project Implementation section.

a. Number of households served & percentage (direct energy assistance):

# of HH served:	
% to projected:	

b. Number of households served & percentage served (self-sufficiency):

MEAP # of HH served:	
MEAP % to projected:	
LIHEAP # of HH served:	
LIHEAP % to Projected:	

c. Number of unduplicated households served & percentage served (any type):

# of HH served:	
% to projected:	

d. Amount of direct energy assistance funding spent & percentage spent (C-108-line 9e, Direct Assistance column):

Funding $:	
% to projected:	

e. Amount of grant funds spent (C-108 line 10h):

State $:	
Federal $:	

f. Number of unduplicated households served by county (Complete table below beginning on row 31)

g. Assistance dollars distributed by county (Complete table below beginning on row 31)

County	MEAP # of unduplicated households	LIHEAP # of unduplicated ho	Assistance $ distributed
ALCONA			
ALGER			
ALLEGAN			
ALPENA			
ANTRIM			
ARENAC			
BARAGA			
BARRY			
BAY			
BENZIE			
BERRIEN			
BRANCH			
CALHOUN			
CASS			
CHARLEVOIX			
CHEBOYGAN			
CHIPPEWA			
CLARE			
CLINTON			
CRAWFORD			
DELTA			
DICKINSON			
EATON			
EMMET			
GENESEE			
GLADWIN			
GOGEBIC			
GRAND TRAVERSE			
GRATIOT			
HILLSDALE			
HOUGHTON			
HURON			
INGHAM			
IONIA			
IOSCO			
IRON			
ISABELLA			
JACKSON			
KALAMAZOO			
KALKASKA			
KENT			
KEWEENAW			
LAKE			
LAPEER			
LEELANAU			
LENAWEE			
LIVINGSTON			

LUCE			
MACKINAC			
MACOMB			
MANISTEE			
MARQUETTE			
MASON			
MECOSTA			
MENOMINEE			
MIDLAND			
MISSAUKEE			
MONROE			
MONTCALM			
MONTMORENCY			
MUSKEGON			
NEWAYGO			
OAKLAND			
OCEANA			
OGEMAW			
ONTONAGON			
OSCEOLA			
OSCODA			
OTSEGO			
OTTAWA			
PRESQUE ISLE			
ROSCOMMON			
SAGINAW			
SAINT CLAIR			
SAINT JOSEPH			
SANILAC			
SCHOOLCRAFT			
SHIAWASSEE			
TUSCOLA			
VAN BUREN			
WASHTENAW			
WAYNE			
WEXFORD			
Total	0	0	0

Eligibility Determination

a. Number of households receiving SER:

b. Number of households determined categorically eligible using a program other than SER:

Home Heating Credit:	
SNAP:	
TANF:	
SDA:	
WIC:	
Head Start:	
SSI:	

c. Number of households for whom income was validated by the grantee:

d. Total households whose eligibility was determined:

Household Metrics

Provide the number of unduplicated households for each item. Please only include the number for the response and not any narrative in this section. Any details about the metrics should be reported in a narrative section (Assurance 16, Project Progress, Noteworthy Accomplishments, etc.).

a. Number of unduplicated households that presented for MEAP Self-Sufficiency Services:

b. Number of unduplicated households that presented for LIHEAP Assurance 16 Services:

c. Number of unduplicated households that received any type of MEAP Self-Sufficiency services (this number should match response *b.* in the Project Milestones section.):

d. Number of unduplicated households that received any type of LIHEAP Assurance 16 services (this number should match response *b.* in the Project Milestones section.):

e. Number of unduplicated households served with Vendor Advocacy Type 1 - Non-App:
MEAP:
LIHEAP:

f. Number of unduplicated households served with Vendor Advocacy Type 2 - New APP Enrollment:
MEAP:
LIHEAP:

g. Number of unduplicated households served with Vendor Advocacy Type 3 - APP Reverification:
MEAP:
LIHEAP:

h. Number of unduplicated households served with Needs Assessment/Referral:
MEAP:
LIHEAP:

i. Number of Budgeting Services Type 1: Financial discussions held:
MEAP:
LIHEAP:

j. Number of Budgeting Services Type 2: Budget review provided:
MEAP:
LIHEAP:

k. Number of Budgeting Services Type 3: Budget counseling sessions held:
MEAP:
LIHEAP:

l. Total number of unduplicated households served with Budgeting Services:
MEAP:
LIHEAP:

m. Number of Energy Conservation Services Type 1: Energy savings discussions held:
MEAP:
LIHEAP:

n. Number of Energy Conservation Services Type 2: Conservation resources provided to households:
MEAP:
LIHEAP:

o. Number of Energy Conservation Services Type 3: Energy education courses attended:
MEAP:
LIHEAP:

p. Number of Energy Conservation Services Type 4: Weatherization referrals confirmed:
MEAP:
LIHEAP:

q. Total number of unduplicated households served with Energy Conservation Services:
MEAP:
LIHEAP:

r. Number of unduplicated households served with Short-term Case Management:
MEAP:
LIHEAP:

s. Number of unduplicated households served with Long-term Case Management:
MEAP:
LIHEAP:

Program Metrics

a. Provide the number of households enrolled during this reporting period by your agency in any Affordable Payment Plan:

Metric	Consumers Energy CARE	DTE Energy LSP	SEMCO Energy MAP	UPPCO EASE
HH Enrolled FY 2025				
HH Enrolled FY 2026				
HH Enrolled FY 2027				
HH Successful*				
HH Removed**				

**A successful household would be a household that remained actively enrolled in the APP and was active at the end of the fiscal year (or until the end of the program if enrollment ended mid-year).*

**Include households that were removed from the program during the reporting period for any reason other than moving out of the service territory or successful completion of the program.

b. Provide the number of households enrolled during this reporting period by your agency in the Home Energy Security Allowance (HESA):
2 year 4 year

c. Provide the total dollars spent in providing HESA Direct Payment Assistance:

Vulnerable Households

a. Number of households with a child under 5 years of age at time of application.

b. Number of households with an individual with a disability.

c. Number of households with an individual age 60 or older at the time of application.

d. Number of households with an individual who has experienced homelessness in the preceding 12 months and who needs energy assistance to secure housing.

e. Number of unduplicated households identified as including an individual from a vulnerable population.

Final Project Status Narrative Report | 2027

Project Identification

Grantee Name:

Grant Number:

Reporting Period: October 1, 2026 – September 30, 2027

Grant Term: October 1, 2026 – September 30, 2027

Project Implementation

Provide a brief outline of the work accomplished during the grant term. Include progress toward timeline objectives.

Click or tap here to enter text.

Assurance 16

Describe how you have used LIHEAP funds to provide Assurance 16 services during this reporting period as well as the impact such services had on households receiving Assurance 16 services.

Click or tap here to enter text.

Noteworthy Accomplishments

Describe accomplishments and problems experienced while carrying out project activities.

Click or tap here to enter text.

Coordinated Efforts

Describe coordinated efforts with other organizations to complete the project.

Click or tap here to enter text.

Project Impacts

Describe impacts, anticipated and unanticipated, experienced as a result of project implementation.

Click or tap here to enter text.

Next Steps

Describe the experience in applying the project products and anticipated "next steps."

Click or tap here to enter text.

Financial Summary

Summary of financial expenditures of grant funds. Include the basis or reason for any discrepancies. Include information about any formal Grant Amendments, including the award of additional funds or the reduction in your grant award.

Click or tap here to enter text.

Evaluation

Evaluate the success of the program. The program should be evaluated against the selected applicant's work plan and objectives. Provide an honest and objective assessment of the successes and failures of the project. The evaluation should have both quantitative and qualitative components. Provide the results from your customer satisfaction survey.

Click or tap here to enter text.

Attachments and Other Materials

Provide project materials developed and implemented during the reporting period (e.g. newspaper articles, newspaper advertisements, forms, brochures, announcements, studies, reports, analyses, audits, etc.). In this section, also feel free to provide any customer feedback received during the reporting period.

Click or tap here to enter text.