P-2914 CALCULATION OF BENEFITS (continued)

P-2914D Manual Budget Calculations (7/1/25, 25-16)

Fuel Program Budget Worksheet (Form 203SF)

Vermont Department for Children and Families
Economic Services Division

203SF

Fuel Program Budget Worksheet

Name ____________________ **SSN** ________________

Household Heating Information

Pay for Heat (y/n) ________

Housing Type ________

# of Bedrooms ________

Fuel Type ________

Subsidy (y/n) ________

Annual Heat cost Part II #1

Maximum gross income for a household size of ______ = ________ **185 % FPL**

Line of credit (Percentage of Benefit) based on date application received: circle one & enter on Part II #4

Date of Application	Season %
Ongoing Elig Review	100 %
March 1 thru November 30	100 %
December	80 %
January	60 %
February	40 %

☐ **HEAT INCLUDED paid to applicant**

☐ **WOOD/PELLET paid to applicant**

☐ **EFT to FUEL DEALER**

Fuel Dealer Name: ____________________

Vendor No: ____________________

Check One if Applicable:*

☐ **$21 Roomer** ☐ **$21 heat incl subsidy benefit**

* If they pass the Maximum Gross Income test no further calculation is needed.

I. Maximum gross income test

a. Total earned income for past 30 days $ ________

b. Total unearned income for the past 30 days $ ________

c. Public assistance (Reach Up, EP, or PSE) $ ________

d.. Total income (a. + b. + c.) $ ________

If household passes maximum gross income test (I), complete section (II) to determine benefit amount.

II. Benefit Amount Determination

Household Income % of poverty range : __________

1	**Annual heating fuel cost (Heat Cost Tables)**	$ ________
2	**Heat Cost Percentage (Fuel Pgm Table II)**	X ________
3	**Base Benefit**	= ________
4	**Season % (date of appl left)**	X ________
5	**Reduced Benefit**	= ________
6	**Benefit % = 100% unless: Housing is subsidized = 55% Heat incl in housing = 30%**	X ________
7	**Reduced Benefit**	= ________
8	**Current Rateable Percent**	X ________
9	***Net Benefit (drop cents)***	= ________

IMPORTANT! The manual budget MUST be done based on correct client information in the month the benefit was paid!

Form 203SF has three main parts:

A. Household Heating Information: (primarily gathered from application)

B. Maximum Gross Income Test: All income and income calculations follow 3Squares VT rules.

C. Benefit Amount Determination: This information is gathered from the four Fuel Income Guidelines & Tables updated annually. You will need to refer to them while using the budget worksheet.

1. Seasonal Fuel Program Income Guidelines (P-2913)

    - This is the 185% of federal poverty line (FPL) income test.

2. Heat Cost Percentage Tables (P-2915)

    - Once the total income is determined, use the Percentage of Poverty Table (P-2914A) to find what range the client falls in, and then find the range on the chart and its corresponding Heating Cost Percentage.

3. Standard Heating Cost Tables (P-2916)

    - This chart provides an estimate of the annual heating cost based on housing type, number of bedrooms, and fuel type.

    - It will be used in the Benefit Determination section of the manual budget with information listed in the Household heating information on the 203SF.

4. Percent of Poverty Table (P-2914A)

    - This table provides income ranges and percentages and is used in conjunction with the “Heat Cost Percentage Table” in P-2915.

    - Once you find the Gross Income in the Maximum Gross Income section, use the total income from line D to look the percentage up on this chart.

Complete the Household Heating Information Section

Household Heating Information		
Pay for Heat (y/n)	a	
Housing Type	b	**Annual Heat cost Part II #1**
# of Bedrooms	c	
Fuel Type	d	
Subsidy (y/n)	e	
Maximum gross income for a household size of	f	= f **185 % FPL**

a. Does the client pay for heat or is it included in the rent?

- This information is gathered from question 5 on the 201SF application or question 42 on Form 202.

b. What type of housing?

- Single Family (1), Mobile Home (2), or Multi-Family (3). This can be found on question 6 of Form 201SF or question 42 of Form 202.

c. How many Bedrooms?

- This can be found on question 7 of Form 201SF or question 42 of Form 202.

d. What is the fuel type?

- (Wood, Pellets, Oil, Kerosene, Propane (gas), Natural Gas, Electricity and Coal.) This can be found on question 8 of Form 201SF or question 42 of Form 202.

e. Is the housing subsidized?

- This can be found on question 9 of Form 201SF or question 39 of Form 202.

f. What is the Maximum gross income for their household size?

- List the number of household members in the first blank and the income limit in the second blank. Household members can be determined by who is listed on the first page of Form 201SF or question 6 of Form 202. The income limit can be found on the Fuel Program Income Guidelines (P-2913).

g. "Line of Credit"

- Circle the appropriate "Season %" (100%, 80%, 60%, 40%) based on the application date. (We will be putting the circled percentage on Section II line 4.)

Line of credit (Percentage of Benefit) based on date application received: circle one & enter on Part II #4

Date of Application	Season % g
Ongoing Elig Review	100 %
March 1 thru November 30	100 %
December	80 %
January	60 %
February	40 %

h. Check off if heat is included, if applicant has a wood/pellet benefit, or if it will be an electronic fund transfer (EFT) to the fuel dealer. (If it is EFT indicate dealer name and vendor number.)

i. If the client is a roomer or has heat included AND subsidized rent, check the appropriate $21 benefit box.

☐ **HEAT INCLUDED paid to applicant** h

☐ **WOOD/PELLET paid to applicant**

☐ **EFT to FUEL DEALER**

Fuel Dealer Name: ______________________________

Vendor No: ______________________________

Check One if Applicable:* i

☐ **$21 Roomer** ☐ **$21 heat incl subsidy benefit**

* If they pass the Maximum Gross Income test no further calculation is needed.

If you check off one of these two options AND the client is income eligible, you're done. Complete the bottom portion of form, submit to your supervisor for review, and then e-mail to Fuel and Utility Team: ahs.dcfesdfuelmgmt@vermont.gov.

Complete Maximum Gross Income Test Section (Section I Parts a-d)

I. Maximum gross income test

a. Total earned income for past 30 days $ ________

b. Total unearned income for the past 30 days $ ________

c. Public assistance (Reach Up, EP, or PSE) $ ________

d. Total income (a. + b. + c.) $ ________

If household passes maximum gross income test (I), complete section (II) to determine benefit amount.

a. Calculate the total earned income for the past 30 days and put it on line **a**. All calculations follow 3SquaresVT income process. Ex: Weekly income is averaged and then multiplied by 4.3.

b. Enter total gross unearned on line **b**.

c. Enter the monthly amount of public assistance income on line **c**.

d. Total all types of income for a gross monthly amount, and enter that amount on line **d**.

e. Compare line **d**. to the maximum gross income for the household size.

   - This information was entered in the household heating information section line **f**.
   - Remember, this is all income received for <u>all mandatory household members</u> the month the benefit was paid! This could easily be different than 3Squares.

If the household is over income, the household is ineligible, and you are done.

If the household is income eligible, continue to Section II of the manual budget sheet, Benefit Amount Determination.

Benefit Amount Determination (Section II)

a. Fill in the first blank Household income % poverty range by using the percentage of poverty table.

   - For Example: a household of 1 with $893.04 total income would be in the 75%-84% range.

B. Household Income per

Household Size	0% TO <75%	75% TO 84%
1	0 TO $839	$ 840 TO $ 952

II. Benefit Amount Determination
Household Income % of poverty range : 75-84%

b. Enter the “Annual heating fuel cost” by using the Standard Heating Cost Table and the household heating information section on line 1. (This will use Fuel type, housing type, and number of bedrooms)

- For Example, a household living in an apartment (multi-family) with 3 bedrooms that heats with propane has an expected heating cost of $2,347/year.

Multi Family Homes

Fuel Type	1 Bedroom	2 Bedrooms	3 Bedrooms
Natural Gas	$ 923	$ 1,148	$ 1,373
Propane	$ 1,109	$ 1,728	$ 2,347

II. Benefit Amount Determination
Household Income % of poverty range : 75-84%

1	**Annual heating fuel cost (Heat Cost Tables)**	$ $2,347

c. Enter the “Heating Cost Percentage” on line two by using the range listed on the top line and the Heat Cost Percentage Tables.

- For Example, the household from example **a** above, with income 75%–84% of the poverty range, would have 87% as their “Heating Cost Percentage.”

II. Benefit Amount Determination
Household Income % of poverty range : 75-84%

1	Annual heating fuel cost (Heat Cost Tables)	$ $2,347
2	Heat Cost Percentage (Fuel Pgm Table II)	X 87%

Table I *HH Income as Percentage of Poverty*	*Table II* *Heating Cost Percentage*
175-185%	27%
165-174%	30%
155-164%	33%
145-154%	66%
135-144%	69%
125-134%	72%
115-124%	75%
105-114%	78%
95-104%	81%
85-94%	84%
75-84%	87%

d. Determine the Base Benefit by taking Annual Heating Fuel Cost (line 1) and multiplying it by the Heat Cost Percentage (line 2).

- For Example: the $2,347 from **b** X the 87% from **c**.
  2347 * 0.87 = 2041.89

1	Annual heating fuel cost (Heat Cost Tables)	$ $2,347
2	Heat Cost Percentage (Fuel Pgm Table II)	X 87%
3	Base Benefit	= $2,041.89

e. Enter the Season % determined in the Heating Information section by the date applied chart.

application received: circle one & enter on Part II #4

Date of Application	Season %
Ongoing Elig Review	100 %
March 1 thru November 30	100 %
December	80 %
January	60 %
February	40 %

1	Annual heating fuel cost (Heat Cost Tables)	$ $2,347
2	Heat Cost Percentage (Fuel Pgm Table II)	X 87%
3	Base Benefit	= $2,041.89
4	Season % (date of appl left)	X 80%

f. Enter Reduced Benefit amount (Base Benefit [line 3] x Season % [line 4])

- From our example: $2,041.89 * 0.8 = $1,633.51

3	Base Benefit	= $2,041.89
4	Season % (date of appl left)	X 80%
5	Reduced Benefit	= $1.633.51
6	Benefit % = 100% unless: Housing is subsidized = 55% Heat incl in housing = 30%	X 100%

g. Enter the Benefit % 100% unless:

- Housing is subsidized= 55%
- Heat is included in housing = 30%

h. Calculate the Reduced Benefit and enter it. Line 5 X Line 6

- In this example, the client does NOT have subsidized housing, and he does NOT have heat included in rent, and so we use 100%.
  1633.51 * 100% = 1633.51

7	Reduced Benefit	= $1,633.51

i. Find the ratable reduction (P-2914B) and write it on Line 8.

- In ACCESS, under FNX: Code Mode: D, Blank SSN, leave month alone, and then in CMD, type FR. The ratable is always the top number.
- For training purposes, we are using 29% as the ratable reduction. This amount may fluctuate throughout the season depending on expected costs.

8	Current Rateable Percent	X 29%
9	*Net Benefit (drop cents)*	= $ 473

j. Calculate the Net benefit (Line 7 X Line 8)

- For this example, that would be $1,633.51 * 0.29 = 473.72
  Drop cents = $473

II. Benefit Amount Determination
Household Income % of poverty range : 75-84%

1	**Annual heating fuel cost (Heat Cost Tables)**	$ $2,347
2	**Heat Cost Percentage (Fuel Pgm Table II)**	X 87%
3	**Base Benefit**	= $2,041.89
4	**Season % (date of appl left)**	X 80%
5	**Reduced Benefit**	= $1,633.51
6	**Benefit % = 100% unless: Housing is subsidized = 55% Heat incl in housing = 30%**	X 100%
7	**Reduced Benefit**	= $1,633.51
8	**Current Rateable Percent**	X 29%
9	***Net Benefit (drop cents)***	= $ 473

Finally: Fill in the Bottom of Form 203SF

Net Benefit Amount (line 9 above):	$ 473
Benefit Paid To Date:	$ 21
Adjusted Amount Due:	$ 452

See Seasonal Fuel Assistance Rule 2914 for more information about the calculation of benefits.