



Home Energy Assistance Fund (HEAF)

Grants Management System User Manual

Table of Contents

| | |
|--|----|
| GMS Overview | 1 |
| Logging In | 1 |
| Creating a New User Account | 1 |
| Managing Your Account | 3 |
| Finding or Starting an Application | 3 |
| Creating an Application | 4 |
| General Information Section | 4 |
| Household Profile Section | 5 |
| Utility Account Details Section | 6 |
| Household Members Section | 7 |
| Income Section | 8 |
| Needs Assessment and Comments Section | 9 |
| Received Required Documents Verification Section | 9 |
| Income Eligibility Information Section | 10 |
| Application Status Section | 10 |
| Print Applicant Forms Section | 12 |
| Agency Administrator Functions | 13 |
| Monitoring Fund Balances | 13 |
| Monitoring Monthly Reimbursements | 15 |
| Running Reports | 16 |
| Monitoring User Accounts | 17 |
| Additional Information | 17 |

GMS Overview

The Wildfire Grants Management System (GMS) supports Wildfire’s efforts to monitor the need for utility assistance, manage the dissemination of grants from various fund sources, and measure their impact.

Partner agencies may use this system to determine client eligibility, input applications and grant requests, and monitor fund balances. Approved grant requests will be tracked by Wildfire staff and used to provide accurate reimbursement of funds guaranteed on behalf of clients.

Logging In

GMS may be accessed from any computer with an internet connection. Login page: <https://wildfire.datasilosolutions.com/Live/default.aspx>

If you have already been assigned a Username and Password by Wildfire, use the information given to you to log in (orange arrow). If you don’t have a Username, create your own account and submit it for approval, using the “Create New User Account” link (black arrow).

Creating a New User Account

wildfire
Igniting Community Action
to End Poverty in Arizona

Grants Management System (GMS)
Wildfire GMS LIVE DATABASE

Username

Password

[I Can't Remember My Username / Password](#)

[Create New User Account](#)

Make sure that you choose the correct "Intake Site Code" from the drop-down list (orange arrow) that corresponds with your agency. Once all your information is entered, click on the Save button (black arrow) at the bottom of the page to finalize your account creation. Then contact Wildfire at HEAF@wildfireaz.org to request activation of your account. Once activated, you will be able to log in using the Username and Password that you chose.

User Information

Intake Site Code

Organization Title

First Name MI Last Name

Address 1 Address 2 City

State Zip Code

Primary Phone Secondary Phone Mobile Phone

Manager Name Manager Email Address

Username Password Email Address

Comment

Entered By: _____ Last Modified By: _____

Managing Your Account

After your account is activated, you can modify the information associated with it, using the “My GMS Account” tab (orange arrow). You may also change your Password using the field provided (black arrow). When you are finished updating your information, click the “Save” button at the bottom of the window.

Application Portal **Administration** **Reports** **My GMS Account**

My GMS Account | [Skip to bottom](#)

User Information

Intake Site Code
Wildfire

Organization: Wildfire Title: Ms.

First Name: MI: Last Name: City: Address 1: 340 E. Palm Lane Address 2: Zip Code: State: AZ Primary Phone: Secondary Phone: Mobile Phone: Manager Name: Manager Email Address: Require Password Change: No
Failed Password Count: 0
Last Login: 04/17/25 12:49 PM

Username: Password: Email Address: Comment: Entered By: ctaylor on 01/22/2025 Last Modified By: ctaylor on 01/22/2025

Save

Finding or Starting an Application

When you first log in, you are taken to the Application Portal. This is where all applications for assistance and their corresponding grant requests are housed. To find a particular application or to start a new application, click on the “Application” tab (black arrow).

wildfire
Igniting Community Action
to End Poverty in Arizona

Application Portal **Administration** **Reports** **My GMS Account**

Fund Dashboard | Payment Queue(s) | **Application** | View ACAA Grants | [Skip to bottom](#)

Last Name: and SSN#: Application ID: COVID-19 Applications: Create Adjustment Application
Application Date: 4/17/2024 to Search
Show only integrations apps without payments: Show only apps with review rejected payments: Start New Application
Status: [Return to Top](#)

If you would like to start a completely new application click the “Start New Application” button (orange arrow).

If you would like to search for an existing application, enter information into any of the the parameters provided and click the “Search” button. Notice the start date of your search (green box) defaults to one year before the current date, so your search will automatically be limited to applications created within the previous year. To change this, click on the field and choose a different date.

Your search results will appear at the bottom of the screen. You may choose to “Edit” or “View” an application, using the corresponding links, or you may choose to “Add” an application for a returning client. This will create a new application using the client’s existing demographic information.

Creating an Application

General Information Section

For new applications, you must begin with the General Information section, and your first step must be to check for previous funding (green box below). Enter the client’s Social Security Number and click the button below it.

The screenshot shows a web form titled "General Information" with a red close button in the top right corner. The form is organized into three columns. The first column contains "Application ID" (143980), "First Name" (text input), "Residential Address" (text input), and "Residential City" (text input). The second column contains "SSN" (text input with a green border and a "Check Previous Funding" button below it), "Residential Apt./Unit/Suite" (text input), "Residential State" (dropdown menu showing "AZ"), and "Residential Zip Code" (text input). The third column contains "Application Date (MM/DD/YYYY)" (04/17/2025), "Last Name" (text input), "Residential County" (dropdown menu), and "Residential Zip Code" (text input).

If the client has received any funds from Wildfire during the previous year, the corresponding information will appear in a table to the left of the screen (green box below). Depending on the fund source, clients may be limited to how many times they can receive funds during a 12-month period. In this case, the client has not received funds during the past year.



General Information X

Application ID: 143980 SSN: 853-51-0147 Application Date (MM/DD/YYYY): 04/17/2025

[Check Previous Funding](#)

Previous Funding from any ACAA partner within last 12 months

| Date | Funding Source | Amount |
|---|----------------|--------|
| There is no approved funding in the last 12 months for this SSN | | |

Funding sources with an asterisk allow for additional applications within 12 months. If amount is in red, then it has been adjusted by ACAA.

In the General Information section, all required fields (in red) must be correctly entered before the additional sections of the application can be accessed. In all sections, if any required fields are left blank or contain improper information, the section heading will be designated with a red X (black arrow above). Any sections with this red X must be addressed and the information must be corrected before the grant request can be processed.

Once all information has been entered correctly, proceed with the application by clicking on the Save button at the bottom of the screen, or by clicking anywhere on the Household Profile section heading (black arrows). While completing the application, if you click on any collapsed section heading, the system will automatically save your progress and expand the chosen section.

Household Profile X

[Return to Application Search](#)
[Delete Application](#)
[Save](#)

[Return to Top](#)

Household Profile Section

The Household Profile section tallies the household size and income makeup of the household. As additional household members and income sources are added to the application, this section will automatically update to reflect the profile of the household.

Household Profile X

Housing Type ▼

Family Type ▼

Household Size
1

of Sources of Household Income
0

of Household Members with Income
0

Referred From ▼

[Skip to bottom](#)

Utility Account Details Section

Enter information from the client’s utility bill into this section. The “Grant Amount Requested” field (green box below) will determine the amount of money the client receives from the fund source you choose (in the Application Status section). The amount entered here must be in accordance with the types of charges the fund source will cover, such as past due amounts, deposits, etc. (see the HEAF Policy Manual for details).

The screenshot shows a web form titled "Utility Account Details" with a close button (X) in the top right corner. The form is organized into several sections:

- Utility Information:** Utility Company (dropdown), Utility Type (dropdown), Account Status (dropdown), and Account Data Confirmation (dropdown).
- Comments:** A text area for "Comment".
- Utility Account Details:** Utility Account Number, Deposit Amount (if any), Past Due Amount (if any), Current Amount Due, and Grant Amount Requested (highlighted with a green border).
- Customer of Record:** Applicant is Customer of Record (checkbox), Customer of Record First Name, Customer of Record MI, and Customer of Record Last Name.
- Enrolled in Utility Programs:** A blue box containing a title and several checkboxes: Low Income Discount, Medical Discount, Energy Savings, Customer Bill Date Selection, Fixed Monthly Payments, Auto Bank Withdrawal of Payments, Agency Referrals, Pre-pay, Bill Print, Third Party Notification, and Financial Crisis Assistance.
- Actions:** Two buttons at the bottom: "Remove This Set of Information" and "Add Another Grant Request" (highlighted with a red border).
- Navigation:** A "Skip to bottom" link at the bottom right.

Many clients will qualify for low-income utility programs that can significantly reduce their utility costs and help them manage their funds. If the client is already enrolled in any of these programs, select the corresponding checkbox (blue section above). If clients are not enrolled, please help them contact their utility services and enroll in any programs that they may qualify for.

If the client is seeking assistance with additional utility bills, you can create another grant request using the “Add Another Grant Request” button (red box above). If an additional grant request is created by mistake, use the “Remove This Set of Information” button to delete the grant request.

Household Members Section

In this section, you will add additional household members (if any) to the application. It is important to check each household member's Social Security Number to determine if they have received funds from Wildfire during the previous 12 months (green box below). If any household members have received funds from a particular fund source during that time, the client is ineligible to receive funds from that fund source.

To add household members, use the "Add Another Household Member" button (red box below). If an additional household member record is added by mistake, use the "Remove This Household Member" button to delete it.

Household Members

SSN

Previous Funding from any ACAA partner within last 12 months

| Date | Funding Source | Amount |
|---|----------------|--------|
| There is no approved funding in the last 12 months for this SSN | | |

Fund sources with an asterisk * allow for additional applications within 12 months. if amount is in red, then it has been adjusted by ACAA

First Name MI Last Name

Same as Applicant's Residential Address

Residential Address Residential Apt./Unit/Suite

Residential City Residential State Residential Zip Code

Date Of Birth (MM/DD/YYYY) Marital Status

Health Insurance Gender

Ethnicity Veteran

Race Disability

American Indian / Alaskan Native
 Asian
 Black / African American
 Native Hawaiian/Pacific Islander
 White
 American Indian / Alaskan Native AND White
 Asian AND white
 Black / African American AND white
 American Indian / Alaskan Native AND Black / African American
 Other Multi-Racial
 Prefer not to answer

Deaf/Hearing
 Mobility
 Speech/Language
 Learning Disability
 Blind/Visual Disability
 Chronic Health
 Housebound
 Other
 Yes
 No

[Skip to bottom](#)

Income Section

In this section, enter the types and amounts of income for each household member. In the “Income Information for:” drop-down field (green box), you will find the names that you entered in the previous sections for the client and each household member. Choose one of the names from the list and add the applicable income information. If the person you selected has an additional source of income, select the “Add Another Income Source” button (red box) and select that person’s name again in the new section. Repeat this process for each household member and source of income.

Be sure to use gross amounts of income and not net amounts; do not include any excludable sources of income on this application (see the HEAF Policy Manual for details). If an income record was added by mistake, use the “Remove This Set of Income Information” button (red box) to delete it.

If no one in the household has any countable income, choose the client’s name in the “Income Information for:” drop-down field and use approximate information for the other required fields, then use \$0.00 for the “30-day Gross Amount” field.

The screenshot shows a web form titled "Income" with a red close button in the top right corner. The form is organized into three columns. The first column contains a dropdown menu labeled "Income Information for:" (highlighted with a green box), a text input field for "Source - Name", and another dropdown menu for "Income Source Confirmation". The second column contains a dropdown menu for "Income Type Description", a text input field for "Source - Phone Number", and a text input field for "Comment". The third column contains a text input field for "30-day Gross Amount" and a text input field for "Source - email". At the bottom right, there is a red-bordered box containing two buttons: "Remove This Set of Income Information" and "Add Another Income Source". A "Skip to Bottom" link is visible at the bottom right of the form.

Needs Assessment and Comments Section

This section measures the impact that high utility bills have on each household’s quality of life. Recording this information is optional. If you elect to skip this section, check the box next to “This section has been intentionally left blank” (red box).

If the fund source requires a crisis reason, use the “Crisis Reasons” and “Comments” fields in this section to document that reason (green boxes).

Needs Assessment and Comments

This section has been intentionally left blank

Due to high energy bills in the last 90 days, have any of the household members...

| | | |
|--|--|--------------------------------------|
| Skipped Meals ▼ | Skipped or reduced medications ▼ | Forgone medical care ▼ |
| Forgone purchasing essential goods ▼ | Delayed or skipped mortgage/rent ▼ | Delayed or skipped car payments ▼ |
| Delayed or skipped insurance payments ▼ | Delayed or skipped child support ▼ | Delayed or skipped tuition ▼ |
| Left household repairs undone ▼ | Reduced or eliminated utility use ▼ | Other - Specify _____ |

Are there special or extenuating circumstances that occurred in the past 30 days that should be considered?
▼

Crisis Reasons
▼

Comments

[Skip to bottom](#)

Received Required Documents Verification Section

This section is used to record the date that each piece of required documentation has been received and placed in the client’s file (digital or hard copy).

When you check the corresponding box for each document, the current date is automatically populated in the date field.

Received Required Documents Verification

| Document Title | Received | Date Received (MM/DD/YYYY) |
|--|--------------------------|----------------------------|
| ID Verification for the Applicant | <input type="checkbox"/> | |
| Citizenship/Residency Status (if applicable) | <input type="checkbox"/> | |
| Address Verification for the Applicant | <input type="checkbox"/> | |
| Proof of Identity for Each Household Member | <input type="checkbox"/> | |
| Current Utility Statement | <input type="checkbox"/> | |
| Proof of Income for the Household | <input type="checkbox"/> | |
| Proof of Crisis (if applicable) | <input type="checkbox"/> | |

* Hard copy of all documentation must be kept on file

Income Eligibility Information Section

In this section, verify whether the client’s household qualifies for assistance from a fund source, based on applicable income criteria (see the HEAF Policy Manual for criteria).

| Income Eligibility Information | | |
|---------------------------------------|---------------------------------------|-----|
| Poverty Level Percentage (FPG) | | |
| HouseholdSize | Household Income | % |
| 1 | \$0.00 | n/a |
| Income Level Percentage (SMI) | | |
| HouseholdSize | Household Income | % |
| 1 | \$0.00 | n/a |
| Energy Burden | | |
| Most Recent Utility Bill Total | Total Household Income (last 30 days) | % |
| \$200.00 | \$0.00 | n/a |

Application Status Section

In this section, finalize the application and approve any grant request(s) corresponding to the Utility Account Details section. If there are multiple grant requests in the Utility Account Details section, they will be reflected here.

- You must choose a fund source for each grant request using the “Fund Source” drop-down field (blue arrow below). Contracted fund sources for your agency along with their available balances are listed here.
- The “Date Approved” field will automatically populate with the current date once the application is approved in the “Application Status” drop-down field (green box below).
- The “Grant Amount Requested” field populates with the amount requested in the Utility Account Details section.
- The “Service Type” drop down list (red arrow) contains types of assistance associated with the selected fund source. Choose the type of service funds are being used for (e.g., utility assistance, utility deposits, appliance repair, or appliance replacement).

Application Status X

Utility Company: ABC Appliance Repair
Utility Account Number: 16578

→ Fund Source:

Date Approved (MM/DD/YYYY):

Grant Amount Requested: \$550.00

→ Service Type:

| Compliance Status | |
|-------------------|--|
| Non-Compliant | Funding source must be selected. |
| Compliant | Grant requested must not exceed maximum allowed by funding source. |
| Compliant | Service Type must be valid for selected fund source. |
| Compliant | Applicant must not have received a prior grant from the selected fund source in the last 12 months (determined by SSN of all household members). |
| Compliant | Income must not exceed Federal Poverty Guidelines for household size. |
| Compliant | Income must not exceed State Median Income guideline for household size. |
| Compliant | Applicant must be U.S. Citizen or Legal Resident, if required by funding source. |
| Compliant | Applicant must be Customer of Record, if required by funding source. |
| Non-Compliant | Grant Amount must not exceed Annual Fund Source Allocation |

Application Status

Application Denial Reason

The “Compliance Status” table reviews the requirements to approve a grant request. If any of the items in this table are Non-Compliant, you must remedy the problem before you can approve the application.

Intake Worker Comments

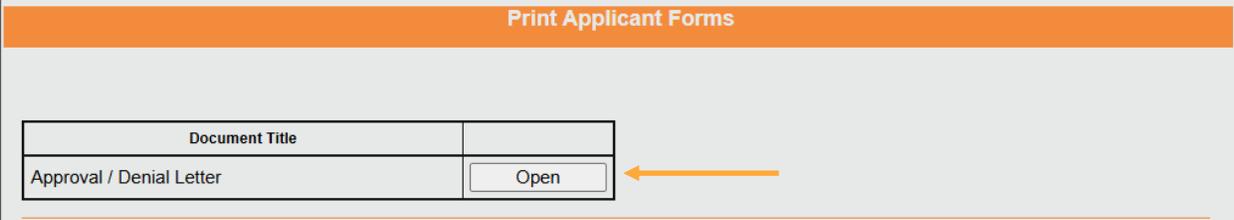
The Intake Worker Comments is available for documenting a crisis reason (if not already documented in the Needs Assessment and Comments section) or other notes, such as

communication with Wildfire about a particular case.

Once all items in the table are Compliant for all grant requests, approve the application by changing the “Application Status” drop-down list (green box above) to “Approved.”

Print Applicant Forms Section

After an application has been approved or denied, print the “Approval/Denial Letter,” which also contains a statement of truth and a release of information for the client to review and approve with a signature. Click on the “Open” button (orange arrow below) to download a printable .pdf version of the form. After the client signs the form, sign it and keep a copy in the client’s file (digital or hard copy). The client should also receive a copy of the signed form.



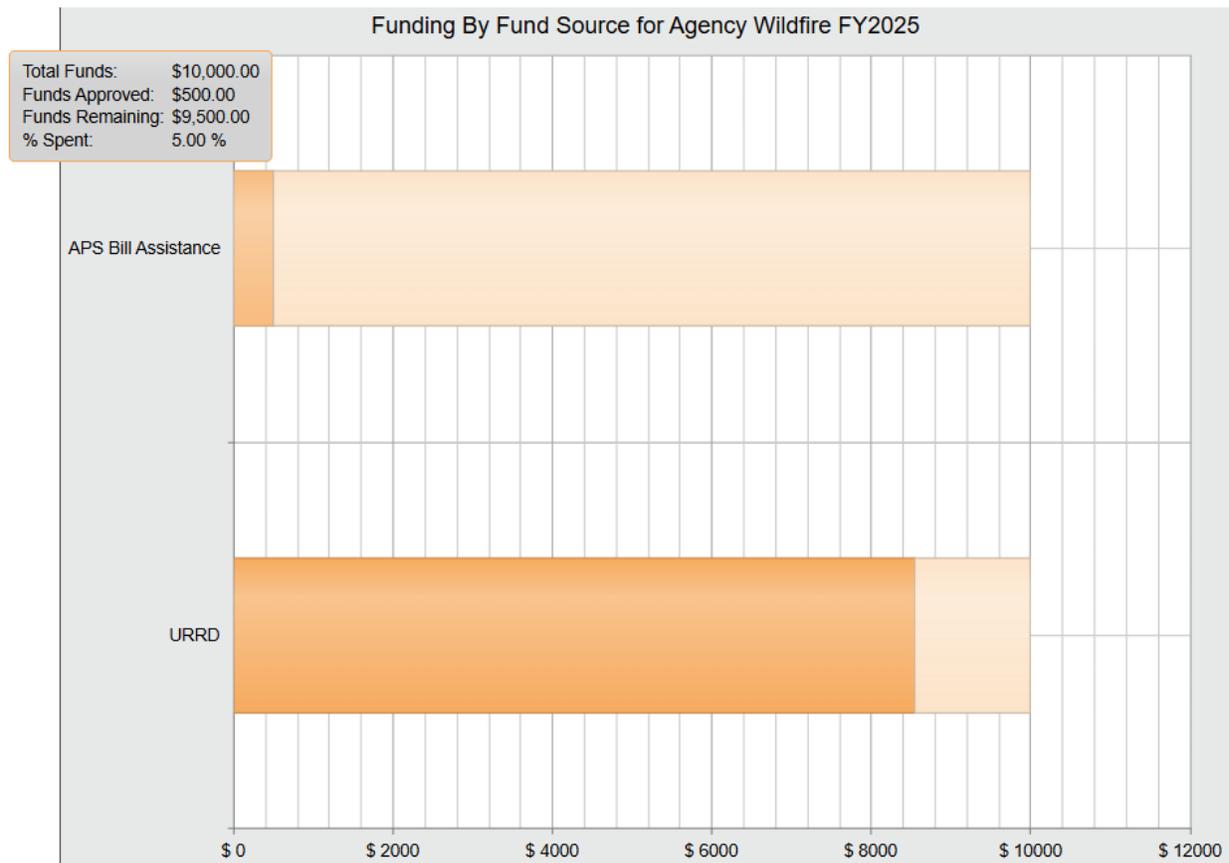
Agency Administrator Functions

Monitoring Fund Balances

Administrators at partner agencies have the responsibility of monitoring expenditure of the agency's allocated funds and ensuring the funds are being expended at a reasonable pace. The Fund Dashboard is an excellent tool to assist with this process. Access it by clicking on the "Fund Dashboard" tab (green box) in the "Application Portal."



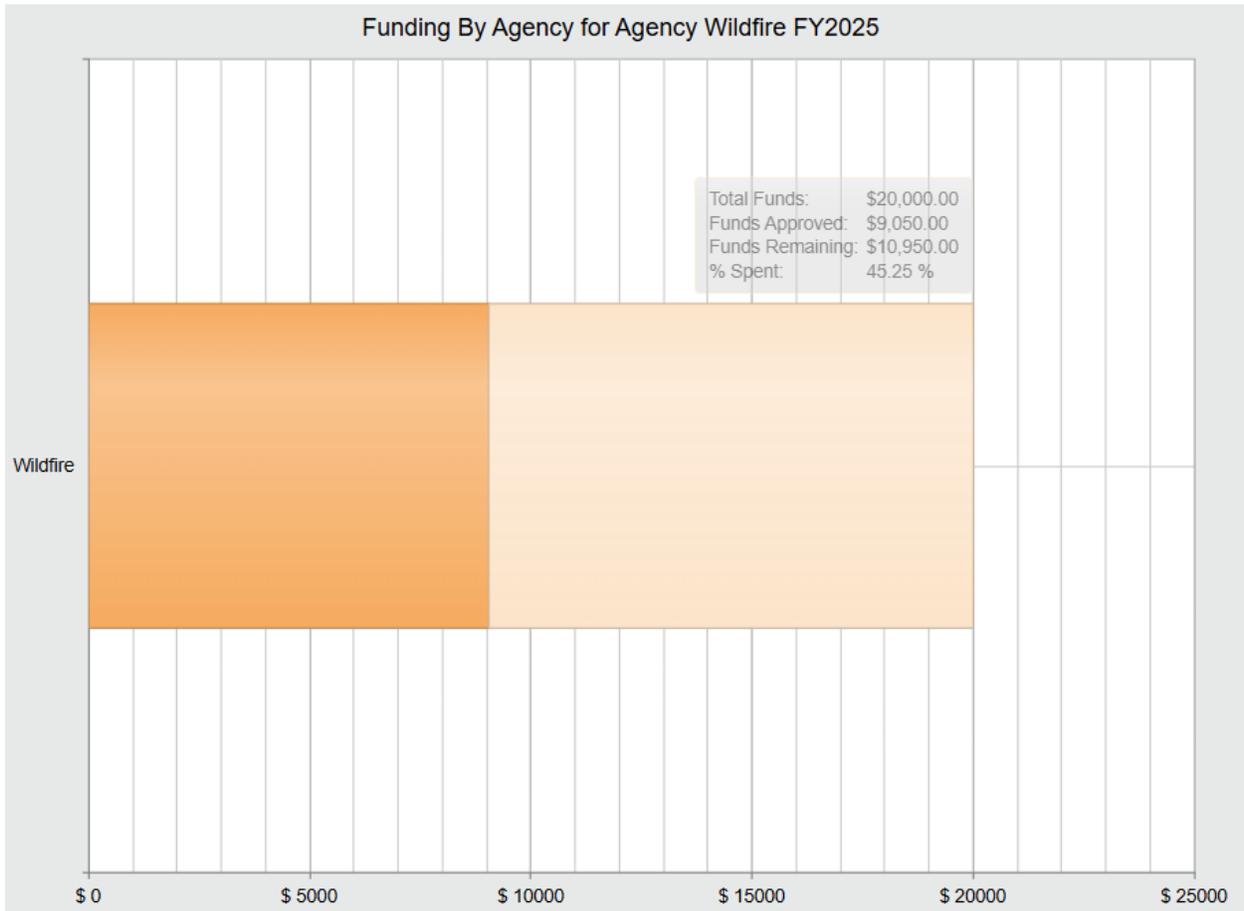
Each allocated fund source for your agency is represented in the graph. The dark orange area of each bar represents the current expenditure of the allocation and the light orange area represents the funds remaining. For a detailed view of a particular fund source, click anywhere on the bar itself.



By Fund Source By Agency
 Fiscal Year:

If you would like an overall view of your agency's expenditures for the fiscal year, click on the "By Agency" button and then on the "Refresh" button.

The resulting bar graph shows you a combined total of all your agency's allocations for the fiscal year. To see a three-year, historical record of your agency's expenditure patterns, click anywhere on the corresponding bar.



Monitoring Monthly Reimbursements

As each application is approved, a link to that application’s corresponding grant request(s) is created in the “Payment Queue” (green box).



Grant requests are reimbursed by Wildfire monthly and by fund source, so it’s a good idea to filter the queue by month, using the monthly selection buttons and the fund source drop-down field. In this case, no fund source is selected, so all this agency’s grant requests approved in the month of May will be visible.

The filter controls include a 'Fund Source' dropdown menu, a radio button for 'By Month' (which is selected), and a date selector for 'Approved Date' showing '< May 2025 >'. There is also a radio button for 'By Date Range' and a 'Refresh' button.

To see a list of applications from a timeframe other than one month, use the “By Date Range” button, and filter the queue using the starting and ending date fields that will be available.

In the queue itself, you will see the progress that Wildfire has made in the reimbursement process for each grant request.

Payment Queue

| Application ID | Date of Approval | Last Name | First Name | Amount Paid | P/D Amount | Status | Review Date | Reimbursement Date | Other Payments? | |
|----------------|------------------|-----------|------------|-------------|------------|----------------|-------------|--------------------|-----------------|---------------------------|
| 22347 | 5/12/2025 | Rabbit | Jessica | \$550.00 | \$110.00 | Pending Review | N/A | N/A | | Edit View |

Number of Payments: 1
Total of Payments: \$550.00
Total P/D Amount: \$110.00
Total of Direct Service + P/D Amount: \$660.00
Number of Adjustments:

To access an individual application, use the “Edit” or “View” links in the right column. The “Other Payments?” column (green box) uses an asterisk to denote grant requests that are one of multiple grant requests in a single application.

Below the queue is the total number of grant requests (Number of Payments) for the month or date range selected, as well as the total dollar amount for direct service and program delivery fees. Each month, make sure these figures match the amount you are expecting for reimbursement from Wildfire.

Running Reports

To see a list of applications created by your agency over a certain period of time, use the “Application Detail” (black arrow) report under the “Reports” tab.

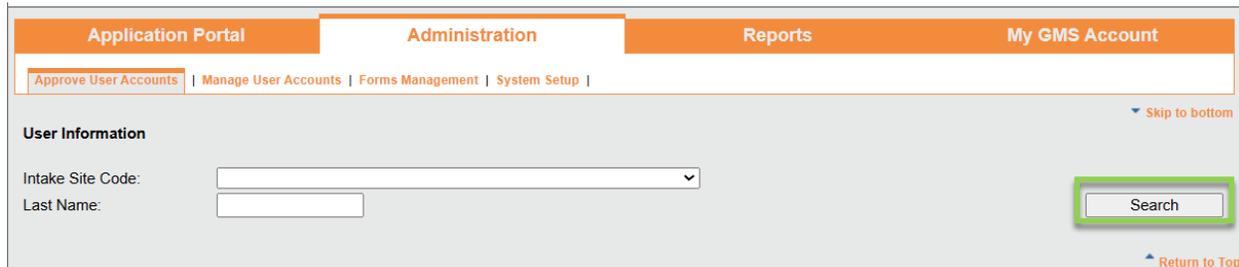


The Application Detail report allows you to customize your results by using filters such as fund source or client name. Use as many filters as you would like to narrow your results. When ready, you may open the report or export the results into Word or Excel (green box below). If you export the report to Excel, you will be able to customize it even further to fit your needs.

The screenshot displays the "Application Detail Report" configuration page. On the left, under the heading "Choose the filters for this report:", there is a list of filter categories: Application Status, Approval Date Between, Organization, Assistance Site, Fund Source, Utility Company, Utility Type, County, Zip, Application Date Between, Client First Name, Client Last Name, Account Number, Grant Amount, Review Status, Review Date Between, and Reimbursement Date Between. The right side of the page contains the corresponding input fields for these filters, including dropdown menus, date pickers, and text boxes. At the bottom left, there is a green-bordered box containing three buttons: "Go", "Word", and "Excel". On the right side, there are links for "Skip to bottom" and "Return to Top".

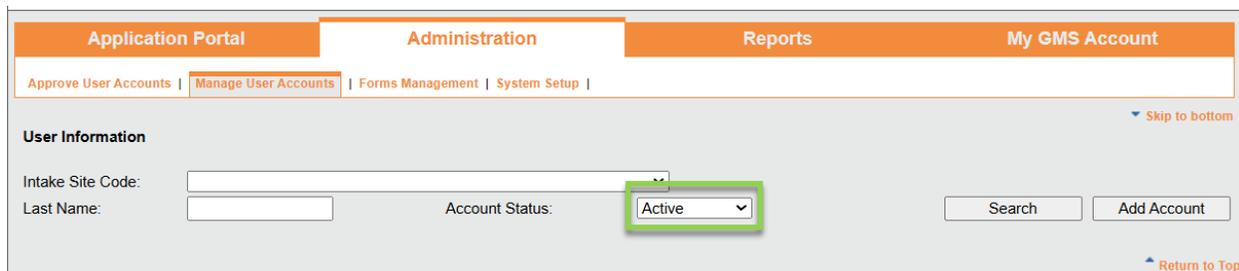
Monitoring User Accounts

There are two different lists you can access when monitoring user accounts in your organization. The first is a list of all users who have requested a new account and are awaiting activation from Wildfire. This list is in the “Approve User Accounts” category in the “Administration” tab. To view the entire list, leave the filters blank and click on the “Search” button (green box).



The screenshot shows the 'Administration' tab selected, with the 'Approve User Accounts' sub-tab active. The 'User Information' section contains two input fields: 'Intake Site Code' and 'Last Name'. A green box highlights the 'Search' button. Navigation links for 'Skip to bottom' and 'Return to Top' are visible.

The second list includes all user accounts associated with your agency. This list is in the “Manage User Accounts” category in the “Administration” tab.



The screenshot shows the 'Administration' tab selected, with the 'Manage User Accounts' sub-tab active. The 'User Information' section includes 'Intake Site Code', 'Last Name', and an 'Account Status' dropdown menu. The 'Account Status' dropdown is highlighted with a green box and shows 'Active' as the selected option. There are also 'Search' and 'Add Account' buttons. Navigation links for 'Skip to bottom' and 'Return to Top' are visible.

To view the entire list, leave the filters blank and click on the “Search” button. You can view the active or the inactive accounts, using the “Account Status” drop-down list (green box).

Contact Wildfire to request changes to user accounts.

Additional Information

Changes to this system may occur with advance notice from Wildfire. When changes are made to the system, this manual will be updated, but there may be a slight delay. If you have questions or you need additional assistance, please contact Wildfire at **HEAF@wildfireaz.org**.