

Data Collection Procedures for Winter Heating Fuels Telephone Survey State Heating Oil and Propane Program (SHOPP)



Office of Energy Statistics

Office of Petroleum & Biofuels Statistics

Petroleum Marketing Statistics Team

October 8, 2014 | Washington, D.C.

Presentation Roadmap

- Survey Overview
- Getting Started
- Pricing Characteristics
- Collecting Additional Information
- Weekly Data Submission
- Weekly Data Collection Tips
- Data Confidentiality and Security



Overview: SHOPP

What is SHOPP?

- State Heating Oil and Propane Program (SHOPP)
- Cooperative data collection effort between the U.S. Energy Information Administration (EIA) and State Energy Offices (SEOs)
- The only survey like it within the EIA





Overview: The Survey

SHOPP's EIA-877 Winter Heating Fuels Telephone Survey

Purpose:

- Designed to collect data on state-level prices of residential propane and No. 2 heating oil during the heating season (October through March)

Who Uses Survey Data?

- Data used by state and federal governments, policymakers, industry analysts, press, and consumers
- Winter heating fuels price data continues to be one of the most requested datasets produced by EIA

Overview: Survey Data

Data collection

- EIA and states contact retail heating fuel outlets weekly via phone or email and obtain price data
- Data are due by Noon EST on Tuesday, except when Monday is a holiday in which case data are due on Wednesday
- Data from some of the larger propane companies are provided directly to EIA, which may reduce the number of calls SEOs have to make
- Prices entered into EIA's Internet Data Collection system
- Both EIA and SEOs have the responsibility to protect data at the respondent level



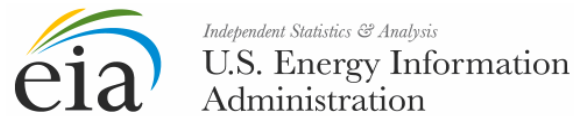
Getting Started



First Steps

- Contact the SHOPP Operator with your name, phone number, & email
- Make sure you have a valid login for the Internet Data Collection (IDC) system
- Confirm access to the IDC
- Review the list of respondents for your state

IDC: Login



Welcome to the EIA Single Sign On Login System

- All Internet Data Collection applications will be unavailable the first and third weekends of the month between 6:00 pm Eastern Time on Saturday and 6:00 am Eastern Time on Sunday.
- All Internet Data Collection applications are unavailable the third Thursday of the month from 8:00pm until 10:00pm Eastern Time.
- Due to recent software upgrades to the electricity surveys you may encounter warnings related to the "applications digital signature" or the "application requiring an earlier version of the Java plug-in". If you receive any of these warning please press the "Run" button to continue. We regret any inconvenience this may cause.
- The OE-781R survey is suspended temporarily due to recent reductions in appropriations for the U.S. EIA. EIA will seek authorization for a revised version of the Monthly Electricity Imports and Exports Report survey. EIA will notify you concerning your filing responsibilities under the revised form. Please contact the survey manager, Michelle Bowles, at Michelle.Bowles@eia.gov with any questions.
- The opening of the 2013 annual data collection cycle for the following annual forms has been delayed:
 - Form EIA-63B, Annual Photovoltaic Cell/Module Shipments Report
 - Form EIA-860, Annual Electric Generator Report
 - Form EIA-861, Annual Electric Power Industry Report
 - Form EIA-861S, Annual Electric Power Industry Report (Short Form)
 - Form EIA-923, Power Plant Operations Report (Annual Respondents)
- The following monthly forms continue to open on their regular schedule:
 - Form EIA-826 Monthly Electric Utility Sales and Revenue Report with State Distributions
 - Form EIA-860M Monthly Update to the Annual Electric Generator Report
 - Form EIA-923 Power Plant Operations Report (Monthly Respondents)

Userid:

Password:

Logon

[Register for a Userid](#) [Forgot your password?](#) [Forgot your Userid?](#)

- Open the Internet Data Collection (IDC) system: <https://signon.eia.doe.gov/ssoserver/login>.
- Sign into system with your Userid & Password

IDC: Login

[Surveys](#)

[EIA-877 Winter Heating Fuels Telephone Survey](#)

[Update](#)

[Update Your Account Profile](#)

[Enrollment](#)

[Add EIA Survey Reporting Capability \(New. Replaces all prior enrollment links\)](#)

- Select “EIA-877 Winter Heating Fuels Telephone Survey”

IDC: Login



EIA-877: Winter Heating Fuels Telephone Survey Notices

[Go to Main Form](#)

Welcome Board of Public Utilities, State of New Jersey

The current SHOPP reference period is Oct 20, 2014, and your submission is **due by Noon on Tuesday**

This week is a normal cycle, with data collection on Monday and price submission due by noon ET on Tuesday. Updates are still being made to the sample and will continue.

Tips and reminders:

- If you are entering all your company data on a spreadsheet and then into this system, you might consider using this application as a CATI system instead. Upon making phone calls to companies, have the application open and on the record of the company you are calling. As you receive price data, enter them directly into the IDC. When you are finished, you can print out a report (Create MM/DD/YYYY Report) to link of all the prices obtained for the reference period, or you can generate a CSV file.
- Please remember that the Review 'Prices Before Submit' button at the bottom of the Main Form page enables you to see prices that are beyond the expected range, and must be pressed to get to the 'Submit' button itself. After you have reviewed any companies that have been flagged, please press the 'Submit' button to send your data.
- Changes to contact information for individual companies or your state office can be made through the Change Co. Contact Info. and Change State Contact Info. links on the Main Form. Email the SHOPP Operator any changes made to the system as well.

Contact Information

Technical problems using the system should be directed to EIA Technical Support at (202) 586-8959. Their hours of operation are 7 a.m. - 5 p.m. EST.

Data issues for this survey should be directed to David Dudley at (202) 586-6612 David.Dudley@eia.gov or Marcela Rourk at (202) 586-4412 or Marcela.Rourk@eia.gov.

Comments or suggestions about this system should be directed to OIT Development at OITDevelopment@eia.gov.

[Go To Main Form](#)

- Select “Go To Main Form”

IDC: Main Form Screen



EIA-877: Winter Heating Fuels Telephone Survey

Main Form Notices Instructions & Help

(CURRENT) Ref. Period: 10/13/2014 State: NJ Report Status: Incomplete Unsubmitted Data: Yes

Click to sort by header (>=Complete)

ID	Company
NJ05023	
NJ07001	
NJ00023	
NJ08012	
NJ95159	
NJ08013	
NJ07003	
NJ07004	
NJ07005	
NJ07002	
NJ04008	

Counts: Total=54 Complete=0 Incomplete=54

Address: [Redacted] ID=NJ05023

Contact: [Redacted] Phone: [Redacted]

E-mail: [Redacted] Fax: [Redacted]

Alt Contact: [Redacted] Alt Ph#: [Redacted]

Comments: [Redacted]

Propane Price (\$/gal) [Redacted] Category: Bulk Keep Full-Credit

- Bulk Keep Full-Credit
- Bulk Keep Full-Cash
- Will Call-Credit
- Will Call-Cash
- Other

[View/Update History](#) [Change Co. Contact Info](#)

[Add Survey Comments](#) [Change State Contact Info](#) [Create 10/13/2014 Report](#) State: NJ

[ADMIN HOME](#) [Review Prices Before Submit](#) OMB Number: 1905-0174 Form Expires: 09/30/2017

- Select desired reference period
- Source of respondents
- Sort outlets by completion status, ID, or by company name
- Data entered under "Price (\$/gal)"

Getting Started: Pre-Season Contact

- State Energy Office to contact respondents prior to the season's start
- Identify a contact person and back-up (if possible) who will provide data from week to week
 - Familiar with survey's weekly data requests
- Build a working-relationship with respondents (establish trust)
 - More likely to report the correct price
 - Improves data consistency from week to week
 - Reduces the amount of time it takes to complete calls
- Agree upon a method (or request) for collecting data
 - Improves data consistency from week to week
- Make notes in the IDC about contact person and method for collecting data



EIA-877: Winter Heating Fuels Telephone Survey

Main Form **Notices** **Instructions & Help**

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Click to sort by header (>=Complete)

ID	Company
NJ05023	
NJ07001	
NJ00023	
NJ08012	
NJ95159	
NJ08013	
NJ07003	
NJ07004	
NJ07005	
NJ07002	
NJ04008	

Counts: Total=54 Complete=0 Incomplete=54

ID=NJ95159

Address: 1 Main Street P.O. Box 7
Small Town, NJ 01001

Contact: _____ Phone: (100) 200-300 x 123
E-mail: _____ Fax: _____
Alt _____ Alt Ph#: _____
Contact: _____

Comments: Tier-level #7: price based on annual consumption 800-950g

Propane Price (\$/gal) _____ Category: Bulk Keep Full-Credit

Next **Cancel** [View/Update History](#)
[Change Co. Contact Info](#)

[Add Survey Comments](#) [Change State Contact Info](#) [Create 10/13/2014 Report](#) State: NJ

[ADMIN HOME](#)

[Review Prices Before Submit](#)

OMB Number: 1905-0174
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- Note in “Comments” section: This tier-level price (range) best meets the survey’s criteria
- Determined during preseason contact with the respondent

Price Characteristics

Price Characteristics

- Prices of Residential Propane and/or No. 2 Heating Oil
- Residential customers - individual customers or households who use the fuel to heat their residences
 - “Residential Sales” do not include apartment buildings, multi-family dwellings, businesses, or institutions

Price Characteristics

- Respondents should report data for the particular retail outlet being surveyed
 - Prices can vary from outlet to outlet
 - Identify the outlet being targeted by stating which city the outlet is located
 - Location-specific information found within the IDC on “Main Form” screen
- Report prices in dollar amounts
 - rounded to the nearest thousandths (e.g., \$1.259)
 - EIA has changed the practice of reporting petroleum marketing data in cents
 - Reflected in all EIA publications

Price Characteristics

- Price based on a “leased” or “company-owned tank”
 - Majority of heating fuel customers do not own their tanks
 - Customer-owned tank prices tend to be less than the “market price”
- Price should exclude:
 - Taxes
 - Discounts
 - Premiums paid for small or large volume purchases
 - Surcharges for customers living outside the normal delivery area

Price Characteristics

- Collect the “Charge” or “Full-Credit” price
 - “Going Rate”
 - “Market Price”
 - Typically do not contain discounts

- Cash prices
 - Include discounts or incentives
 - Generally \$0.05 to \$0.10 per gallon difference
 - Lower / more attractive price
 - We do not want the cash price!

Propane Marketing & Pricing

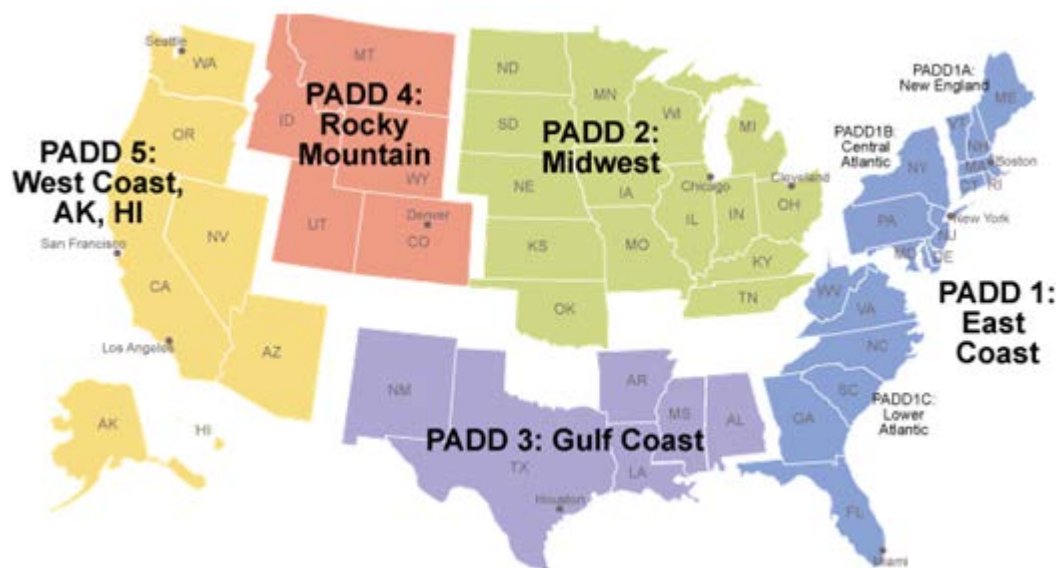
- Price per gallon sometimes based on annual consumption
- Tier-level or product code
 - Establish annual consumption rate for average residential customer
 - Choose the tier-level that corresponds with that volume
 - Avoid asking for usage-per-season ranges that are round numbers (e.g., 1,000 gallons)
- Record tier-level and product code information used when collecting price data within the “Comments” section of the IDC
- Goal - weekly data consistency



Propane Marketing & Pricing

Targeting which price to collect from a specific outlet:

- Statewide average – annual consumption rate per residence
 - Can help target the pricing tier that best reflects that outlet's residential market
- Statewide average - tank size per residence
- If unknown: identify outlet's average tank size or annual consumption rate for its residential customers



Source: Today In Energy <http://www.eia.gov/todayinenergy/detail.cfm?id=4890&src=email>

Collecting Additional Information

Survey Comments (current week)



EIA-877: Winter Heating Fuels Telephone Survey

Main Form Notices Instructions & Help

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Counts: Total=54 Complete=0 Incomplete=54

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Small Town, NJ 01001
Contact: Phone: (100) 200-300 x 123
E-mail: Fax:
Alt Contact: Alt Ph#:
Comments: Tier-level #7: price based on annual consumption 800-950g

Price (\$/gal) Category
Propane Bulk Keep Full-Credit

▶ Next X Cancel [View/Update History](#)
[Change Co. Contact Info](#)

[Add Survey Comments](#) [Change State Contact Info](#) [Create 10/13/2014 Report](#) State: NJ

[ADMIN HOME](#)

[Review Prices Before Submit](#)

OMB Number: 1905-0174
Form Expires: 09/30/2017

- “Add Survey Comments”
- Survey Operator reviews entries weekly

Survey Comments (current week)



EIA-877: Winter Heating Fuels Telephone Survey

Comments

Enter any information pertinent to this submission, including the current period and any prior periods. Include changes in company operating status or other reasons for any large fluctuations in your submission. This will expedite the processing and may avoid telephone follow-ups.

4023- _____ - Price increase confirmed.
7019- _____ - Price increase confirmed.
7021- _____ - Price increase confirmed.
6017- _____ - Change in pricing tiers; new price is 900+gallons.

Save

Cancel

- Special notes for week only
- Prices, data verification, company issues, etc.
- Notes do not carry over from week to week

Company Contact Info



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[Review Prices Before Submit](#)

OMB Number: 1905-0174
Form Expires: 09/30/2017

- “Change Co. Contact Info” option

Company Contact Info



EIA-877: Winter Heating Fuels Telephone Survey

Company Contact Information

ID=NJ05023		
Address		
DBA Name:	<input type="text"/>	
Address:	<input type="text"/>	
	<input type="text"/>	
City:	State: <input type="text" value="▼"/>	Zip Code: <input type="text"/> - <input type="text"/>
Contact Name		
Prefix: <input type="text" value="▼"/>	First: <input type="text"/>	Middle: <input type="text"/>
Last: <input type="text"/>	Suffix: <input type="text" value="▼"/>	
Title: <input type="text"/>		
Alternate First Name: <input type="text"/>	Last Name: <input type="text"/>	
Comments:	<input type="text"/>	
Communication		
Phone: (<input type="text"/>) <input type="text"/> - <input type="text"/>	Ext. <input type="text"/>	Fax: (<input type="text"/>) <input type="text"/> - <input type="text"/>
Alt Phone: (<input type="text"/>) <input type="text"/> - <input type="text"/>		
E-Mail:	<input type="text"/>	

Save

Cancel

- Company contact information
- Notify EIA SHOPP Survey Operator of any updates
- Collect emails from contacts of all company outlets

Weekly Data Submission

Price Review Pre-submission



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Main Form Notices Instructions & Help

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» ID Company

NJ05023
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NJ08013
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Address: 1 Main Street P.O. Box 7
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Contact: _____ Phone: (100) 200-300 x 123
E-mail: _____ Fax: _____
Alt _____ Alt Ph#: _____
Contact: _____

Comments: Tier-level #7: price based on annual consumption 800-950g

Price (\$/gal)	Category
Propane <input type="text"/>	Bulk Keep Full-Credit ▼

[View/Update History](#)
[Change Co. Contact Info](#)

[Add Survey Comments](#) [Change State Contact Info](#) [Create 10/13/2014 Report](#) State: NJ ▼

[ADMIN HOME](#) **Review Prices Before Submit** OMB Number: 1905-0174
Form Expires: 09/30/2017

- “Review Prices Before Submit”

Price Review Pre-submission

EIA-877: Winter Heating Fuels Telephone Survey
Review Prices

Reference Period: 10/20/2014 State: NJ

Companies with Price Differences Greater than expected

ID	Company
----	---------

Address: [Redacted] D=NJ05023

Contact: [Redacted] Phone: () - x

E-mail: [Redacted] Fax:

Alt Contact: [Redacted] Alt Ph#:

Comments: [Redacted]

Mean Price Change			
All Companies	\$0.003		
This State			
	Price This Period	Price Prev. Period	Price Change
This Company	\$4.290	\$4.140	\$0.150
Price expected to be between Inclusive	\$4.130	and	\$4.210

[Company History Report](#)

Submit to EIA Back to Main Form

- Flagged companies will be listed
- Review the companies with price differences greater/lesser than expected
- Chance to call respondent for verification

Data Submission

EIA-877: Winter Heating Fuels Telephone Survey Submit Confirmation

Data have been successfully submitted to EIA.

OK

- Select “OK”
- Final prices submitted to EIA
- Prices subject to change pending further analysis/validation calls
- EIA will notify the SEO of any data adjustments

Weekly Data Collection Tips

Weekly Data Collections

Before a call is made:

- Review previously reported data
 - Utilize the IDC (refer to IDC slides)
 - Company History report is helpful

- Look for consistencies or noticeable trends that may be emerging
 - (e.g., \$3.520, \$3.530, \$3.540)
 - (e.g., \$3.490, \$3.490, \$3.490, \$3.490)



Weekly Data Collection Tips: Calls to Respondents

- **Take your time** while speaking with respondents
 - Don't rush off the phone
 - Calls can still be completed within a reasonable amount of time
- Pay attention to the data being reported by the respondent
 - Ask the respondent questions about the data being reported
- Difficult respondents who are noncompliant
 - Contact the SHOPP Operator
 - We will work together to resolve issues
 - Streamline a process for collecting future data

Weekly Data Collection Tips: Errors

- Common errors made by respondents
 - Quote wrong prices from company's price list
 - Quote wrong product code number or tier-level price
- Objective = catch errors as they occur
- Verbalize the price difference by restating it in the form of a question
 - (e.g., \$3.590? Did your residential propane really increase by twenty cents from last week to this week?)
 - (e.g., \$3.490? That is a decrease of 20 cents from last week. This is a counter-trend movement compared with what we are seeing reported elsewhere within the state. Did your heating oil really decrease in price by 20 cents?)
- Questions like these force the respondent to think more carefully about the data they are reporting
- Asking questions at time of first call reduces the amount of disruption to daily operations later in the processing cycle

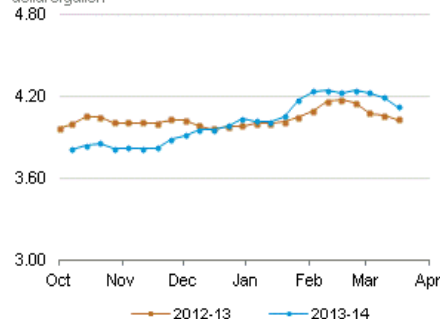
Weekly Data Collection Tips: Timely Submission

- Data submitted by Noon EST on Tuesdays during normal collection cycles
 - Encouraged to submit data earlier
- Several in-house data validation & pre-publication tasks
 - Between the hours of Noon EST and 6:00 pm Tuesday
 - Publication deadline - Wednesday morning 10:30 am
- Contact the SHOPP Operator if your office is having trouble
 - Don't wait until Noon EST Tuesday

U.S. Heating Oil and Propane Prices

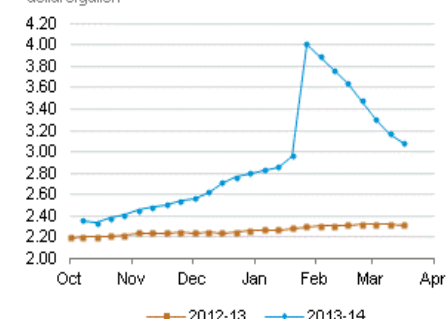
Residential heating oil

dollars/gallon



Residential propane

dollars/gallon



	3/17/2014	change from			3/17/2014	change from	
		week ago	year ago			week ago	year ago
Heating Oil				Propane			
Residential	4.123	↓ 0.072	↑ 0.094	Residential	3.079	↓ 0.086	↑ 0.768
Wholesale	3.189	↓ 0.124	NA	Wholesale	1.371	↓ 0.056	NA

Note: Price in dollars per gallon, excluding taxes. Values shown on the graph and corresponding data pages for the previous week may be revised to account for late submissions and corrections.

Source: Heating Oil & Propane Update <http://www.eia.gov/petroleum/heatingoilpropane/>

Data Confidentiality and Security

Data Security

- **Data security** means protecting data from being compromised and deterring the unwanted actions of unauthorized users
- Both EIA and SEOs share the responsibility to protect data at the respondent level
- Company-level information is **NOT** to be shared with respondents
 - Mass emails are not encouraged
 - Respondents can identify which companies are participating by reading the email addresses of others
- Special permission to share company-level data and respondent information with anyone (including same-state agencies) must be obtained
 - EIA's Data Confidentiality Officer
 - File a formal request to share company-level data with other agencies



For More Information: Data Publications



Independent Statistics & Analysis

U.S. Energy Information
Administration

U.S. Energy Information Administration home page www.eia.gov

This Week in Petroleum (TWIP) <http://www.eia.gov/oog/info/twip/twip.asp>

Heating Oil and Propane Update (HOPU) <http://www.eia.gov/petroleum/heatingoilpropane/>

Short-Term Energy Outlook (STEO) <http://www.eia.gov/forecasts/steo/>

Weekly Petroleum Status Report (WPSR)

http://www.eia.gov/oil_gas/petroleum/data_publications/weekly_petroleum_status_report/wpsr.html

SHOPP's EIA-877 Winter Heating Fuels Telephone Survey Contact Information

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Survey Email Account
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SHOPPSurvey@eia.gov