

Home Energy Assistance Program (HEAP)

Intake Checklist to Accept Online HEAP Applications

Online Applications are recommended to be accepted within one (1) business day of the Applied Date.

- ☐ Search for Application and verify there is only one Application.
- ☐ Download Online Application and Upload to Files.
- ☐ Check the Intake Worker field to verify the correct username has populated
- ☐ Enter the Date Application is accepted in the Received Date Field.
- ☐ Verify and update Address using utility bill (if available), include updating address if not in proper case and/or misspelled.
- ☐ Update Household Member name using documentation submitted if not in proper case and/or misspelled.
- ☐ Review Household Members SSN for accuracy.
- ☐ Check that all fields on the Application have been completed including fields not required by the software system.
- ☐ Review that the correct Requested Vendor is checked.
Note: Does the fuel type match the Heating System fuel type?
- ☐ Remove 'Vendor Not Listed' and update to Direct Check, if applicable.
- ☐ Verify that Application Questionnaire has been completed.

Verify that all pertinent forms were submitted:

- ☐ Application, All Pages
 - ☐ Permission To Share
 - ☐ Valid Photo Id
 - ☐ SSN
 - ☐ Income
 - ☐ Utility Bill (most recent)
 - ☐ Citizenship
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- ☐ Contact Applicant to notify them a Reminder Form will be sent.
Note: Reminder Form may be mailed if an online Applicant is not able to respond electronically.
 - ☐ Enter Case Note with date and time when CAA contacted Applicant, information provided and documentation due date.
 - ☐ Send an Online Reminder Form to Applicant.

