

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

- 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.

