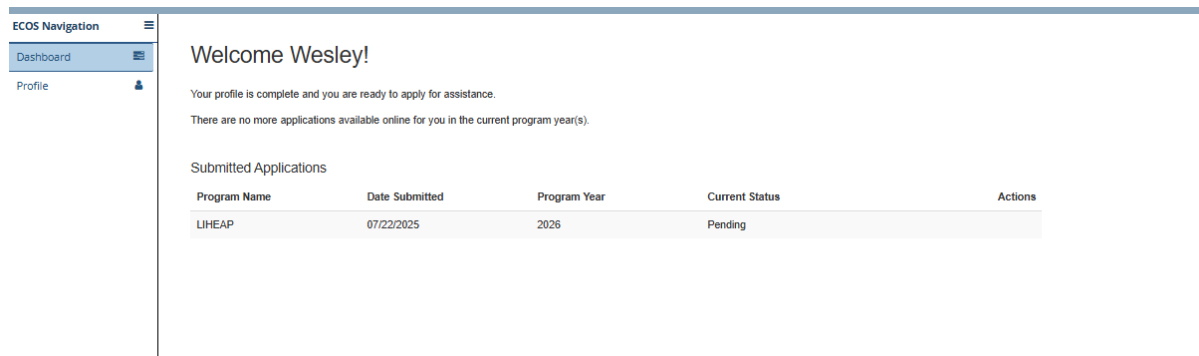# How To – Add Additional Documents to Online Application
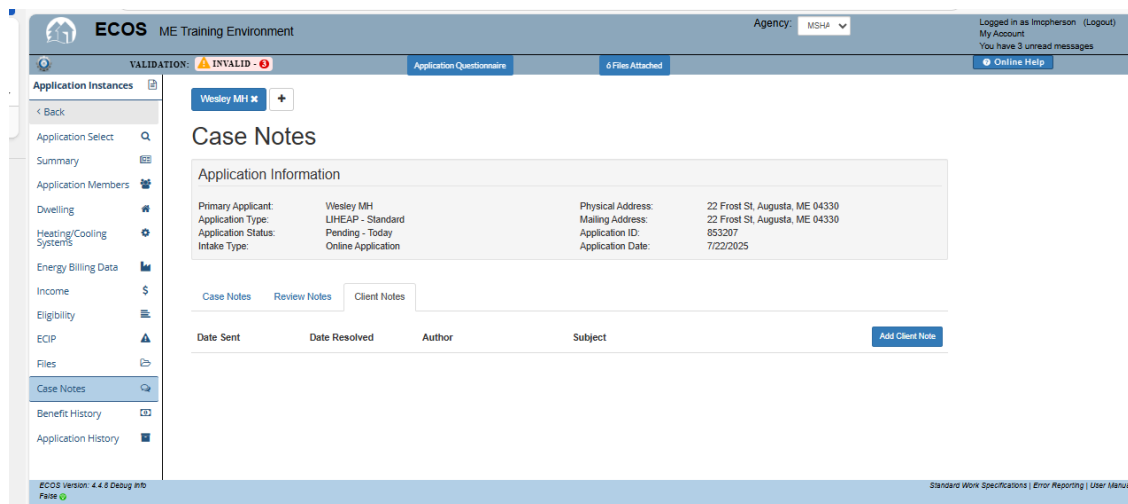
This is the screen the online Applicant will see when they log into their account once their Application has been submitted.

To open the online Application to allow additional documents to be upload.

The CAA is to:

- Open Application
- Go to 'Case Notes'
- Click the 'Client Notes' tab
- Click Add 'Client Note'

A 'Client Note Detail' Modal will pop up.

- Add information to the Description/Subject of the 'Client Note Detail'.
- Add Case note explaining what the applicant is missing and any other pertinent information.
- Check the box 'Allow client upload additional files from the online portal'.
- Click 'Create' button.

Note: Be sure that the information is correct. Once Create is clicked the content cannot be edited.

Client Note Detail ✕

Client Name:	Wesley MH	Created By:	McPherson, Lori
Program:	LIHEAP	Created Date:	07/22/2025
Application ID:	853207		

Description:
> Additional Documentation Required

Note:
> Contacted Applicant to let them know the Permission To Share was missing. Explained that we notify them via email when the online Application is ready to accept documents and that once they have uploaded the signed Permission to Share to reply to our email.

☑ Allow client to upload additional files from Online Portal

[Create] [Cancel]

To view the Client note click the 'View' button.

Wesley MH ✕ **+**

Case Notes

Application Information

Primary Applicant:	Wesley MH	Physical Address:	22 Frost St, Augusta, ME 04330
Application Type:	LIHEAP - Standard	Mailing Address:	22 Frost St, Augusta, ME 04330
Application Status:	Pending - Today	Application ID:	853207
Intake Type:	Online Application	Application Date:	7/22/2025

Case Notes   Review Notes   **Client Notes**

Date Sent	Date Resolved	Author	Subject	Add Client Note
07/22/2025		Lori McPherson	Additional Documentation Required	View

CAA is then to communicate with the Applicant letting them know that the online Application is now ready for them to upload additional documentation and that it is important the client contact the CAA when additional documents have been uploaded.

The online Applicant will log into their online HEAP account. The account will show that the Current Status is 'Pending (Waiting for files)' and an 'Upload Additional Files' button.

- Applicant is to click on the 'Upload Additional Files' button.
- Application Files modal will populate.
- Applicant is to upload all additional documents required through the.

Application Files

Add File

Select Type   [⌄]

Select File   [Choose File] No file chosen

Select Association   [MH, Wesley   ⌄]

[**Upload**]   A maximum total filesize of 25 MB can be uploaded at a time.

Uploaded Files

File ID	File Name	File Type	Association		
1862901	1Test document.docx	Citizenship	MH, Wesley	Download	Delete
1862902	1Income Test.docx	Income	MH, Wesley	Download	Delete
1862903	1SSN Test File.docx	SSN Proof	MH, Wesley	Download	Delete
1862904	1Utility Bill.docx	Utility Bill	Central Maine Power Co.	Download	Delete
1862906	Fuel Vendor Test File.doc...	Utility Bill	Vendor Not Listed	Download	Delete
1862907	1 Photo ID Test File.docx	Photo ID	MH, Wesley	Download	Delete

[Close]

Once documents have been uploaded by the online Applicant. The Applicant will need to contact the CAA. There is no notification for the CAA to know that documents have been uploaded.

However, once the Applicant has uploaded the additional documentation CAAs are to complete the following:

- CAA is to verify that the additional documentation was uploaded.
- CAA selects the 'Client Notes' tab on the Case Notes screen.
- Click 'View' Button.

- Check the 'Prevent Client from uploading additional files' check box.
- Click 'Resolve' button.

When Applicant logs into their online Application, the account the' waiting for files' and 'upload additional documents' will no longer appear.

ECOS Navigation

Dashboard

Profile

Welcome Wesley!

Your profile is complete and you are ready to apply for assistance.

There are no more applications available online for you in the current program year(s).

Submitted Applications

Program Name	Date Submitted	Program Year	Current Status	Actions
LIHEAP	07/22/2025	2026	Pending	