

Home Energy Assistance Program (HEAP)

Certifier Checklist

- ☐ Review Reminder Form to verify requested documents
- ☐ Review Case Notes for important information pertaining to the Application
- ☐ Verify that all pertinent forms are uploaded to the HEAP system of Record, are complete, signed and dated by Applicant and leave a Case Note detailing missing information.
 - ☐ Signed Application, all pages
 - ☐ Valid Photo ID
 - ☐ Permission To Share (signed by all)
 - ☐ Income
 - ☐ SSN
 - ☐ Utility Bill
 - ☐ Citizenship
- ☐ Verify the Application Questionnaire is complete, take note of the answer for Question #10: Yes or No (*Circle One*)
- ☐ Verify that the information on the uploaded signed Application matches the HEAP System of Record.
 - ☐ Fix capitalization and/or spelling errors
 - ☐ Dwelling Information
 - ☐ Income Type (s)
 - ☐ Heating System (s)
 - ☐ Energy Billing Data
 - ☐ Verify the Requested Vendor is correct
- ☐ Verify the provided utility bill meets program requirements
 - Add Case Notes regarding any discrepancies with the utility bill (Not in HH Member Name, Address does not match the application, prior usage seems low)
 - Only if necessary, change the Application Questionnaire Question #10 answer and leave a detailed case note explaining the change. (Question 10 was answered yes, but the utility bill is not in a HH Member name, or vice versa.)
- ☐ Calculate income for all Application Members. (Excluding, SHI Applications)
- ☐ Verify SNAP/TANF Letter includes all Household Members. (Excluding, SHI Applications)
- ☐ Determine which Eligibility Category is more beneficial. (Income/Categorical) (Excluding, SHI Applications)
- ☐ Check Percent of Poverty matches on Summary and Income screen. If it does not, CAA, must uncheck and recheck the income verified check box for all income prior to Certifying.
- ☐ Certify using Calculation Method "Subsidized with Heat Included" if Applicant is SHI.
- ☐ Check Benefit History screen to ensure Benefit is issuing to correct Vendor, Benefit and fuel type is populating correctly.
- ☐ Add Case Note detailing denial reason.
- ☐ Upload Denial Letter.
- ☐ Review income documentation for any eligible Medical Expenses.

