

## Home Energy Assistance Program (HEAP)

### Intake Checklist to Accept Online HEAP Applications

Online Applications are 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.

