

HOME ENERGY ASSISTANCE PROGRAM (HEAP)  
**DOCUMENT CHECKLIST and FORMS BUNDLE COVER SHEET**

**DOCUMENT CHECKLIST**

**INSTRUCTIONS:** SSN and photo ID documentation must be uploaded into HEAP Cloud in the designated slots. All other documents that are needed for an application should be scanned in a bundle in the following order and uploaded as one attachment in HEAP Cloud. **Note:** Items 1-9 are required documents for all applications. Other documents are required on a case-by-case basis depending on the Household's situation.

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| <ul style="list-style-type: none"> <li>1. <input type="checkbox"/> HEAP Application (signed)</li> <li>2. <input type="checkbox"/> Permission to Share Personal Information</li> <li>3. <input type="checkbox"/> Income Worksheet</li> <li>4. <input type="checkbox"/> Odd Job Income Affidavit (if applicable)</li> <li>5. <input type="checkbox"/> Self-Employment Worksheet (if applicable)</li> <li>6. <input type="checkbox"/> Income Documentation (back-up)</li> <li>7. <input type="checkbox"/> Document Verification Form (if applicable)</li> </ul> | <ul style="list-style-type: none"> <li>8. <input type="checkbox"/> Electric Utility Bill</li> <li>9. <input type="checkbox"/> LIAP Application</li> <li>10. <input type="checkbox"/> Minor Child(ren) Primary Residency Self-Declaration</li> <li>11. <input type="checkbox"/> File Notes</li> <li>12. <input type="checkbox"/> Reminder Form</li> <li>13. <input type="checkbox"/> Subsidized Housing Form</li> <li>14. <input type="checkbox"/> Lease Agreement or Landlord Affidavit (if applicable)</li> </ul> |
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**HEAP FORMS BUNDLE**

**The following forms are contained in the HEAP Forms Bundle.**

**Required for all Files**

- HEAP Application
- Permission to Share Personal Information

**Forms Pertaining to Income**

- Income Worksheet
- Self-Employment Worksheet

**Other Forms**

- Minor Child(ren) Primary Residency Self-Declaration
- Reminder Form
- Subsidized Housing Form
- HEAP Income Information Confidentiality Waiver

**The following forms are not in the HEAP Forms Bundle and can be downloaded directly from the CAA Portal.**

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| <ul style="list-style-type: none"> <li>• Odd Job Income Affidavit</li> <li>• HEAP Application Update Form</li> <li>• Landlord Affidavit</li> <li>• HEAP Application Voided</li> </ul> | <ul style="list-style-type: none"> <li>• Waiver Request Form</li> <li>• Benefit Return Form</li> <li>• Document Verification Form</li> <li>• File Notes</li> </ul> |
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**APPLICANT INFORMATION**

**Provide the following data and forms will auto-populate.**

**PRIMARY APPLICANT**

First Name \_\_\_\_\_ Middle Name \_\_\_\_\_  
 Last Name \_\_\_\_\_  
 Service Address \_\_\_\_\_  
 Apt # \_\_\_\_\_  
 City State Zip \_\_\_\_\_  
 Mailing Address \_\_\_\_\_  
 City State Zip \_\_\_\_\_  
 Phone \_\_\_\_\_  
 Alternate Phone \_\_\_\_\_  
 Email \_\_\_\_\_

**CAA**

CAA Name \_\_\_\_\_  
 Mailing Address \_\_\_\_\_  
 City State Zip \_\_\_\_\_  
 CAA Phone \_\_\_\_\_  
 CAA Fax \_\_\_\_\_  
 CAA Email \_\_\_\_\_  
 Intake Worker Name \_\_\_\_\_  
 Intake Worker Phone \_\_\_\_\_  
 Intake Worker Email \_\_\_\_\_

**LIHEAP APPLICATION**

HEAP Application ID \_\_\_\_\_  
 Application Date \_\_\_\_\_  
 Income Verification Period  
 1 Month \_\_\_\_\_ Previous 30 Days  
 From: \_\_\_\_\_ To: \_\_\_\_\_  
 mm/dd/yyyy mm/dd/yyyy

**FUEL VENDOR**

Vendor Name \_\_\_\_\_  
 Primary Fuel Type \_\_\_\_\_  
 Secondary Fuel Type \_\_\_\_\_