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

DOCUMENT CHECKLIST

INSTRUCTIONS: SSN and photo ID documentation must be uploaded into the application software 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 the application software. *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.

1. HEAP Application (signed)
2. Permission to Share Personal Information
3. Income Worksheet
4. Odd Job Income Affidavit *(if applicable)*
5. Self-Employment Worksheet *(if applicable)*
6. Income Documentation (back-up)
7. Document Verification Form *(if applicable)*
8. Electric Utility Bill
9. LIAP Application
10. Minor Child(ren) Primary Residency Self-Declaration
11. File Notes
12. Reminder Form
13. Subsidized Housing Form
14. Lease Agreement or Landlord Affidavit (if applicable)

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.

- Odd Job Income Affidavit
- HEAP Application Update Form
- Landlord Affidavit
- HEAP Application Voided
- Waiver Request Form
- Benefit Return Form
- Document Verification Form
- File Notes

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 _____

HEAP APPLICATION

HEAP Application ID _____
Application Date _____
Created Date _____

FUEL VENDOR

Benefit Vendor Name _____
Primary Fuel Type _____
Secondary Fuel Type _____

Income Verification Period: 1 Month   Previous 30 Days
From: _____ To: _____
          mm/dd/yyyy   mm/dd/yyyy