

HEAP Certifier Checklist

Reviewing of the HEAP Application File and HEAP Cloud

- Put all HEAP Documents in order as listed on the Bundle.
- Review the application for any changes made by the applicant.
Update HEAP Cloud Application and make comments of changes as necessary.
- Review the Reminder Form and verify that all items checked have been received.
If missing, document what is missing in the document section of HEAP Cloud.
- Review all pertinent forms for completion. Example: Signatures
Document what is missing on the form in the Document section of HEAP Cloud.
- Review all income documentation and finalize the Income Worksheet.
Document what is missing in the Document section of HEAP Cloud.
- Enter all countable income for each household member in the income section of HEAP Cloud.

Before Certifying in HEAP Cloud

- Verify Household Member's Information.
- Verify Applicant's Address information.
Address must match Utility Bill and/or other documents submitted by the applicant.
- Verify Phone Numbers and Email Address.
- Verify all income has been entered into HEAP Cloud and matches Income Worksheet.
- Verify Heating System and Fuel Type information.
- Verify Vendor Information.
Verify the name on the Account.
Verify the account numbers are correct and not notes made at intake.
Verify the utility account number matches the utility bill.
- Verify Usage Method.
Review all questions and answers to determine the correct usage method.
If DHLC is used, verify that the correct reason is selected.
- Verify that the Fuel Allowance is correct based on the Subsidized Housing Form or 50058/50059 or RD Form.
- Verify all pertinent documents are received and completed.
- Identify any information that is missing in the document section.