



FORMAT FOR LIHEAP APPLICANT RECORDS

Required Documentation for Heating/Cooling Eligible Applicants

- LIHEAP application signed by both the applicant and an agency representative.
- Documentation of Social Security Number Verification (See Section 3.6)
 - **Applicant:** Copy of the social security card.
 - **All other Household Members:** Copy of the social security card, unless they meet the exception.
- **All cards and/or documents must be legible.**
- A government or state issued photo I.D. – Applicant and all Household Members. **All copies must be legible.**
- Proof of income for all household members (as applicable)
- Verification of Employment (if applicable)
- Documentation to support Vulnerability (Responsibility)
- Verification of Citizenship
- Verification of Active Energy Account
- Verification of Utility Allowance (if applicable)
- Verification of Disability (if applicable)
- Copy of the Notification of Eligibility Letter

Required Documentation for Crisis Eligible Applicants

- LIHEAP application signed by both the applicant and an agency representative.
- Documentation of Social Security Number Verification (See above)
- A government or state issued photo I.D. – Applicant and all Household Members. **All copies must be legible.**
- Proof of income for all household members (as applicable)
- Verification of Employment (if applicable)
- Documentation to support Vulnerability (Responsibility).
- Verification of Citizenship
- Verification of Active Energy Account
- Documentation such as a disconnect notice, or other documented information confirming there is an actual service interruption at the time of application
- Documentation to support a claim of a Life Threatening situation, if needed
- If the crisis is due to the need for a repair or replacement of A/C or furnace, the file must contain copies of the invoices to support purchase, installation, or repair of equipment
- Completed LIHEAP Crisis Assistance Form
- Copy of the Notification of Eligibility Letter

Required Documentation for Ineligible Applicants/Denied Files

- Denied files should contain all the required documentation for a regular application (Heating/Cooling/Crisis) in order to justify the denial.
- Copy of Denial Letter

**Client Records whether stored electronically or hardcopy must be clearly labeled and identifiable.
Records shall be maintained exclusively for LIHEAP by Applicant.**