

CHECKLIST OF MANDATORY DOCUMENTS FOR LIHEAP

Copies of all required documents must be included. Incomplete applications will not be accepted, attempts to contact the client will be made, if we are unsuccessful the application will be voided. **PLEASE DO NOT USE WHITE OUT ON ANY PART OF THE APPLICATION.**

- **Energy Intake Form (CSD 43)**
 - Fill out and sign/date
- **Energy Service Agreement for Occupant (CSD 515A) *Weatherization Only**
 - Fill out and sign/date
- **Household/Dwelling Information Form (CSD 540) *Weatherization Only**
 - Fill out and sign/date
- **Account Holder Authorization and Consent Form (CSD 081)**
 - Read carefully and sign/date
- **Current Utility Bill(s)**, please send complete copies, copies must contain a billing period of at least 22 days. Include any past due or disconnection notices, if applicable.
 - Energy Electric Bill
 - Energy Gas Bill- If you do not have a gas bill and your utilities are **ALL ELECTRIC**, please indicate so on the **Energy Intake Form (CSD 43)**
 - If your utilities are included in rent, please include a rental statement in lieu of a utility bill.
- **Identification** (for applicant & spouse/partner):
 - Provide a copy of a photo ID with current legal name, California ID, or other valid US government issued ID.
 - Provide a copy of Social Security Card, or any legal document with the complete social security number.
- **Household Income:** Income for everyone in the household 18 years of age and older must be provided. Persons without income must submit form **CSD 43B**. This must be filled out completely and signed/dated.
 - **WAGES:** Copies of check stubs for each pay period within the last 30 days. If there are gaps between pay periods, attach a brief explanation.
 - **SOCIAL SECURITY INCOME:** Award letter from the current year, copy of current check stub or a bank statement displaying your most recent deposit.
 - **EDD/DISABILITY:** Provide the last two payment stubs or a payment history provided by EDD or a complete bank statement detailing your EDD payment transfers. Documents must include recipient's name.
 - **VA:** Award letter from the current year or current bank statement.
 - **RETIREMENT/PENSION/ANNUITY:** Award letter from the current year or copy of current check or check stub or verification letter. **BANK STATEMENTS ARE NOT ACCEPTED.**
 - **WORKERS COMENSATION:** Provide the last two payment stubs received or an award letter for the current year.
 - **SELF-EMPLOYMENT:** Provide a journal or profit/loss statement indicating your employment and your gross income for the last 30 days. May require further documentation pending type of employment.
 - **AFDC/CalWORKs/TANF/ CalFresh:** Notice of action payment verification showing current benefits (must be issued within 6 weeks of application date), a payment history from Health & Human Services, a monthly statement from <https://www.mybenefitscalwin.org/>, or obtain a Passport to Services by contacting your social worker. CalFresh does not affect your income, but it must be included if anyone in the household receives these benefits.
 - **GIFTS/LOANS:** Provide a letter from **each** person that has given you a gift (cash), loan, or helped you with bills/expenses in the last 30 days. The letter must specify the dollar amount, if it was a gift or a loan (if repayment is required it is a loan) if it was a one-time payment or payments will be recurring. The letter must include the full name, phone number and signature of the person giving the payment.