







SERV**TRAQ**


Local Solutions For California

LIHEAP Online



www.CALIHEAPApply.com

LIHEAP Online


[COMPANY](#) [SERVICES](#)[APPLYING FOR HELP](#) [CONTACTS/LINKS](#) 

**CCES** **CENTRAL COAST ENERGY SERVICES ONLINE LIHEAP APPLICATION**

Hello, Jgarcia ! | [Log off](#)

 [Select Language](#) 

Online LIHEAP Application User Login

 In order to use this website, you must either log in with your account credentials or create an account

ENTER LOGIN DETAILS

User Name*:

Password*:

Remember Me?: ☐

[LOG IN](#)


If you do not already have an account with us, [click here to sign up](#) .

If you've forgotten or lost your password, [click here to reset it](#) .

Application version: 2.155.24.0


Brand it as your own.

Agency Forms

 **CENTRAL COAST ENERGY SERVICES ONLINE LIHEAP APPLICATION** Hello, creejohnson ! | Log off

Select Language ▼

Required Application Forms

 Please download the forms below and fill them out **prior to beginning** the application process. In order for your application to be processed, all forms on this page must be filled out and uploaded.





Form: Sample Form Title Instructions: Follow up instructions Download	Form: Sample Form Title Instructions: Follow up instructions Download
Form: Sample Form Title Instructions: Follow up instructions Download	Form: Sample Form Title Instructions: Follow up instructions Download
Form: Sample Form Title Instructions: Follow up instructions Download	Form: Sample Form Title Instructions: Follow up instructions Download


[CONTINUE TO THE LIHEAP ONLINE APPLICATION](#)

Forms are managed by the agency


- Request **additional** documentation
- Provide **educational material**

Customer Side of CALIHEAPApply

[COMPANY](#) [SERVICES](#)[APPLYING FOR HELP](#) [CONTACTS/LINKS](#) 

**CENTRAL COAST ENERGY SERVICES ONLINE LIHEAP APPLICATION**

Hello, JGTest ! | [Log off](#)


Select Language 

Manage User Profile

START A NEW LIHEAP APPLICATION

USER PROFILE INFORMATION

Name*: JULIANA GARCIA

 **IMPORTANT!** Make sure you enter an email address you can access. If you change your email address, you will be required to confirm the address before you can continue to use the site.

Email Address*: Julie@ServTraq.com

Alternate Email:

Zip Code*: 95076

City*: WATSONVILLE


County*: SANTA CRUZ

UPDATE PROFILE

Customers can submit only **ONE** application per **calendar year**

Email Notifications

Submission

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

From: info@caliheapapply.com
To: JUL GARX
Cc:
Subject: CA LIHEAP Application Submission Email

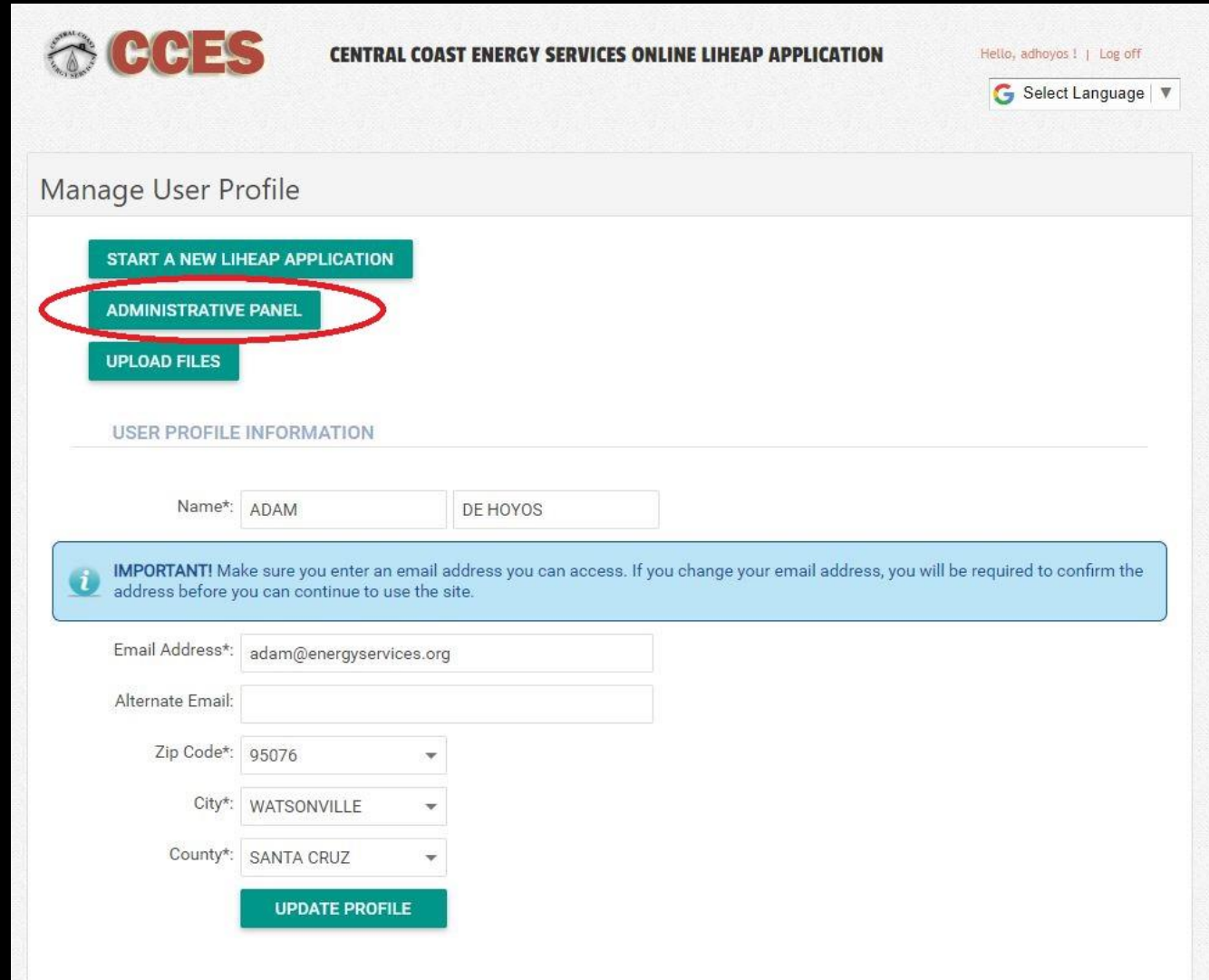
Congratulations JUL GARX!


Your application has been submitted successfully. You can [click this link to go to your profile page and view the status of any submitted applications.](#)


The Central Coast Energy Services Team

Agency Side of CALIHEAPApply

Full access through
Administrative Panel



 **CCES** **CENTRAL COAST ENERGY SERVICES ONLINE LIHEAP APPLICATION** [Hello, adhoyos !](#) | [Log off](#)

 [Select Language](#) ▼

Manage User Profile


[START A NEW LIHEAP APPLICATION](#)

[ADMINISTRATIVE PANEL](#)

[UPLOAD FILES](#)

USER PROFILE INFORMATION

Name*:

 **IMPORTANT!** Make sure you enter an email address you can access. If you change your email address, you will be required to confirm the address before you can continue to use the site.

Email Address*:

Alternate Email:

Zip Code*: ▼

City*: ▼

County*: ▼

[UPDATE PROFILE](#)

Agency Administrative Panel



Online LIHEAP Application Admin Panel

Submitted Applications

User Administration

Agency Forms

Uploaded Files

SELECTED SECTION

Search

Adding Agency Forms

Online LIHEAP Application Admin Panel Submitted Applications User Administration Agency Administration **Agency Forms** Uploaded Files

Add New Application Form

Save Save and Close Exit

APPLICATION FORM INFORMATION

Form Title*:

Instructions:


Form Download Url*:
This must be a fully qualified Url like https://www.example.com/myform.pdf

Form Type*:

Form Type*:

Display Order*:

Required Application Forms

 Please download the forms below and fill them out **prior to beginning** the application process. In order for your application to be processed, all forms on this page must be filled out and uploaded.

Form: Sample Form Title Instructions: Follow up instructions Download	Form: Sample Form Title Instructions: Follow up instructions Download
Form: Sample Form Title Instructions: Follow up instructions Download	Form: Sample Form Title Instructions: Follow up instructions Download
Form: Sample Form Title Instructions: Follow up instructions Download	Form: Sample Form Title Instructions: Follow up instructions Download

Processing an Application

Online LIHEAP Application Admin Panel




 Submitted Applications

 User Administration

 Agency Forms

 Uploaded Files

Search

Edit	Download	Download Files	Agency	First Name	Last Name	Application Submitted	Application Status
			Central Coast Energy Services, Inc.	LAURA	GATES	9/8/2018 11:38:49 AM	IN PROGRESS

Step 1) Download Submitted Documents

The screenshot shows a web browser window displaying the 'Online LIHEAP Application Admin Panel' and a PG&E Energy Statement. The admin panel on the left has a 'Submitted Applications List' section with buttons for 'Edit', 'Download', and 'Download Files'. The 'Download Files' button is circled in red. Below the admin panel, a Windows File Explorer window shows the path 'This PC > Downloads > ApplicationFiles-47503' with a file named '2018 CAL IHEAP ATTACHMENT'. The PG&E Energy Statement on the right includes account details, a service summary for Laura Gates, a bill summary with a total balance of \$229.55, and a 15-day notice regarding a past due balance.

Online LIHEAP Application Admin Panel Submitted Applications List

Submitted Applications List

Edit Download Download Files

Compressed Folder Tools ApplicationFiles-47503

File Home Share View Extract

This PC > Downloads > ApplicationFiles-47503

Quick access

- Desktop
- Downloads
- Documents
- Pictures
- Xmits_2018
- Xfers2018
- OneDrive
- This PC
- 3D Objects

Name

2018 CAL IHEAP ATTACHMENT

PG&E ENERGY STATEMENT www.pge.com/MyEnergy

Account No: [REDACTED]
Statement Date: 08/21/2018
Due Date: 09/11/2018

Service For:
LAURA GATES
[REDACTED]
MENLO PARK, CA 94025

Your Account Summary

Amount Due on Previous Statement	\$187.34
Payment(s) Received Since Last Statement	0.00
Previous Unpaid Balance	\$187.34
Current PG&E Electric Delivery Charges	\$6.82
Peninsula Clean Energy Electric Generation Charges	17.17
Current Gas Charges	18.22

Questions about your bill?
Monday-Friday 7 a.m.-9 p.m.
Saturday 8 a.m.-6 p.m.
Phone: 1-866-743-0335
www.pge.com/MyEnergy

Local Office Address
275 Industrial Road
San Carlos, CA 94070

Your Enrolled Programs
CARE Discount, Medical Baseline

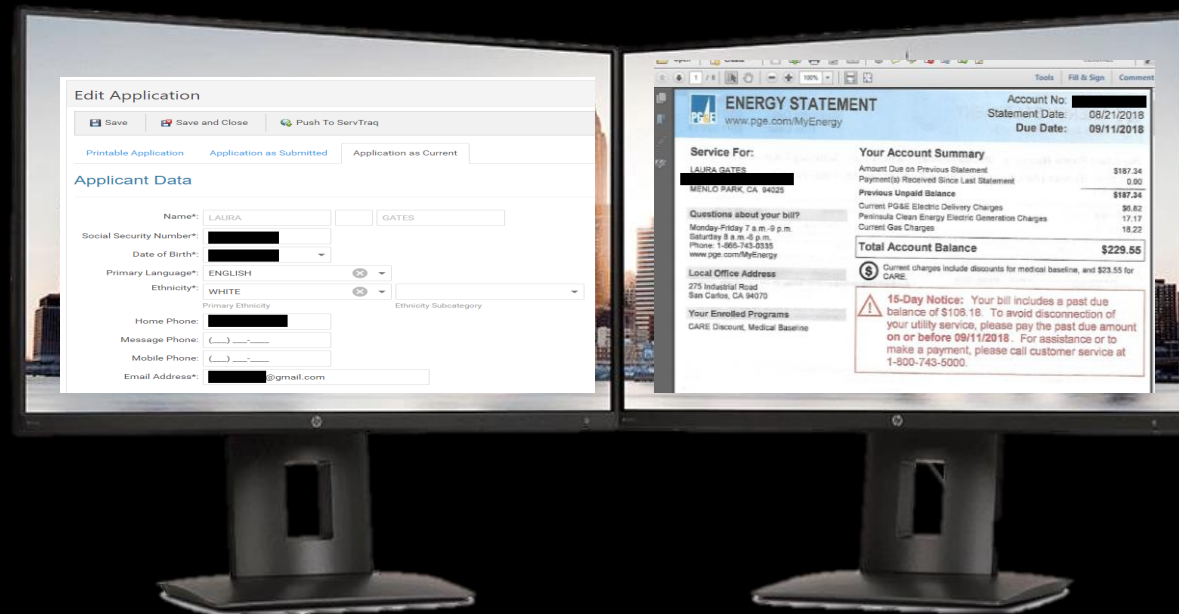
Total Account Balance **\$229.55**

Current charges include discounts for medical baseline, and \$23.55 for CARE.

15-Day Notice: Your bill includes a past due balance of \$106.18. To avoid disconnection of your utility service, please pay the past due amount **on or before 09/11/2018**. For assistance or to make a payment, please call customer service at 1-800-743-5000.

Step 1) Download Submitted Documents

- A dual monitor set up makes for quick and easy processing



Application View

Print, view,
or edit the
information
submitted

Submitted Applications User Administration Agency Forms Uploaded Files

Edit Application

Save Save and Close Push To ServTraQ

Printable Application Application as Submitted Application as Current


Page 1 of 2 PDF


Department of Community Services and Development			Official Use Only:	
Energy Intake Form			Priority Points	
CSD 43 (11/2015)			A.C.C.	
Agency:		Intake Initials:	Intake Date:	Eligibility Cert Date
				Job Control Code
First Name	Middle Initial	Last Name	Date of Birth	
LAURA		GATES	MM/DD/YY [REDACTED]	
Mailing Address			Unit Number	
[REDACTED]			[REDACTED]	
Mailing City	Mailing County	Mailing State	Mailing Zip Code	
MENLO PARK	SAN MATEO	CA	94025	
SERVICE ADDRESS – Address where applicant lives (this cannot be a P.O. Box)				
Is your service address the same as mailing address?			<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Have you lived at this residence during each of the past 12 months			<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No	
Service Address			Unit Number	
[REDACTED]			[REDACTED]	
Service City	Service County	Service State	Service Zip Code	
MENLO PARK	SAN MATEO	CA	94025	


Applicant Data

- Name*
- SSN
- DOB
- Language
- Ethnicity
- Phone Number
- Email Address

Edit Application

 Save

 Save and Close

 Push To ServTraQ

[Printable Application](#) [Application as Submitted](#) [Application as Current](#)

Applicant Data

Name*: LAURA

GATES

Social Security Number*: [REDACTED]

Date of Birth*: [REDACTED]

Primary Language*: ENGLISH

Ethnicity*: WHITE

Primary Ethnicity

Ethnicity Subcategory

Home Phone: [REDACTED]

Message Phone: () -

Mobile Phone: () -

Email Address*: [REDACTED]@gmail.com

Mailing and POS Address

Mailing Address

Line 1:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Address #	Address Street/PO Box	Street Type
Line 2:	<input type="text"/>	<input type="text"/>	
	Building Type	Unit Number	
Line 3:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Zip Code	City	County
			State

Place of Service Address

☒ Have You Lived at this Residence for the Past 12 Months?

Line 1:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Address #	Address Street	Street Type
Line 2:	<input type="text"/>	<input type="text"/>	
	Building Type	Unit Number	
Line 3:	<input type="text"/>	<input type="text"/>	<input type="text"/>
	Zip Code	City	County
			State

Household Demographics

Summary or
Individual (CSBG) Entry

Household Demographics

Household Size:	1	^ v			
2 Years & Younger:	0	^ v			
Ages 6 to 18:	0	^ v			
60 or Older:	1	^ v			
Native American:	0	^ v			
Limited English:	0	^ v			
			Ages 3 to 5:	0	^ v
			Ages 19 to 59:	0	^ v
			Disabled:	1	^ v
			Farmworker:	0	^ v

Energy Account Information

Energy Bill

To which energy bill do you want the LIHEAP benefit to be applied?*

☒ Natural Gas ☐ Electricity ☐ Wood ☐ Propane ☐ Fuel Oil ☐ Kerosene

Utility to Pay*: PACIFIC GAS & ELECTRIC COMPANY ▼

Account Number*: [REDACTED]

Bill Name: LAURA [REDACTED] GATES
First Name MI Last Name

Bill Address: [REDACTED] [REDACTED] MENLO PARK 94025 CA
Address Line 1 Address Line 2 City Zip Code State

Bill Info: 30 \$0.00 \$0.00 [REDACTED]
Bill Num Days Supplied Amount Energy Cost Total Bill Amount Pledge Date RRP? RRP Exp. Date

Energy Account Information

Other Energy Account Information

What is the main fuel used to HEAT your home?*

☒ Natural Gas ☐ Electricity ☐ Wood ☐ Propane ☐ Fuel Oil ☐ Kerosene

In addition to your main heating source, do you ever use any of the following to heat your home (you can select more than one):

☐ Natural Gas ☒ Electricity ☐ Wood ☐ Propane ☐ Fuel Oil ☐ Kerosene

Electric Account

Are your utilities all electric?*

☐ Yes ☒ No

Is your electricity shut off?*

☐ Yes ☒ No

Do you have a past due notice?*

☒ Yes ☐ No

Household Income

Summary or

Individual (CSBG) Entry

Income

Are you or someone in your household CURRENTLY receiving CalFresh (Food Stamps)?*

☒ Yes ☐ No

Enter the number of household members who receive income*

0

Enter total GROSS monthly income for all persons living in the household.

Wages*: \$0.00

Pensions*: \$0.00

TANF / Cal Works*: \$0.00

SSI / SSP*: \$0.00

SSA / SSDI*: \$0.00

Interest*: \$0.00

Other*: \$0.00

Total Income: \$0.00

Step 3) Data Transfer to ServTraq

Edit Application

Save

Save and Close

Push To ServTraq

Printable Application

Application as Submitted

Application as Current

Applicant Data

Name*: LAURA

GATES

Social Security Number*:

Date of Birth*:

Primary Language*: ENGLISH

Ethnicity*: WHITE

Primary Ethnicity

Ethnicity Subcategory

Home Phone:


Message Phone: () -

Mobile Phone: () -

Email Address*: @gmail.com

“Push” complete applications to ServTraq to eliminate additional data entry

Step 4) Processing through ServTraQ



Local Solutions for California

Welcome 60000ANyguen ! [[Log Out](#)] [[Change Password](#)] [[Contact ServTraQ Support](#)]

Home

Contacts

HEAP

Customer/Application Search

Online Application Processing

Pending/Incomplete Applications

Application Data Transfer

Rejected Records

Rejected Record Search and Entry

Rejected Record Clearance

Credit Return Payment Update

CARE RRP Application Entry

Intake Appointment Schedule

Online Application Processing

Edit Application Refresh Export

Enter Search Criteria...

Program	Application Status	Intake Date	Customer Name	SSN
HEAP 2016	INCOMPLETE	10/18/2016	JOHN DOE	265-49-8989
HEAP 2016	INCOMPLETE	10/20/2016	KEITH QUERY	547-85-4545
HEAP 2016	INCOMPLETE	10/19/2016	LINDA MARS	745-87-4587
HEAP 2016	INCOMPLETE	10/19/2016	ROSS CLOROX	858-58-5858

Step 4) Processing through ServTraq

Save

Save and Close

Add a Job

Exit

Delete

Refresh

Validate Addresses

Check Status in CORE

Sections

Program/Payment/Intake

Mailing Address

POS Address

Household

Electricity

Natural Gas

Wood/Propane/Oil

Additional Energy

Income

Performance Measures

Referrals

Rejections

Edit Application

JOHN DOE, ApplicationID - 119111

Program/Payment/Intake

Customer: JOHN DOE

☐ Phone duplicate in PY?

Program: 2016

HEAP 2016

Program Year*

Program*

Status: INCOMPLETE

DENIED

INCOMPLETE

ELIGIBLE

PENDING

Payment: \$0.00

\$50.00

Supp. Payment*

Total Payment*

Email Notifications

Transferred

Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

From: noreply@caliheapapply.com
To: DAVID [REDACTED]; Julie Garcia
Cc:
Subject: CA LIHEAP Application Status Update

Sent: Thu 5/8/2014 8:16 AM

Hello DAVID [REDACTED],

Your LIHEAP application's status was updated on 5/8/2014 at 8:15 AM. You can [click this link](#) to go to your profile page and view the status of any submitted applications.

The status of the application you submitted on 5/6/2014 at 1:17 PM is **APPLICATION TRANSFERRED TO STATE FOR CREDIT OR PAYMENT.**


You will receive a confirmation and more detailed status explanation by e mail or mail directly.

Do not reply to this email as the mailbox is unattended.

Thank you,
The Central Coast Energy Services Team

Email Notifications

Denied

 Click here to download pictures. To help protect your privacy, Outlook prevented automatic download of some pictures in this message.

From: noreply@caliheapapply.com
To: VIOLETA [REDACTED]; Julie Garcia
Cc:
Subject: CA LIHEAP Application Status Update

Sent: Tue 5/6/2014 3:

Hello VIOLETA [REDACTED],

Your LIHEAP application's status was updated on 5/6/2014 at 3:33 PM. You can [click this link](#) to go to your profile page and view the status of any submitted applications.

The status of the application you submitted on 5/6/2014 at 12:00 PM is **PAYMENT ASSISTANCE WILL NOT BE RECEIVED BY CUSTOMER.**

You will receive a confirmation and more detailed status explanation by e mail or mail directly.

Do not reply to this email as the mailbox is unattended.

Thank you,
The Central Coast Energy Services Team

Removing and Recovering Applications

Submitted Applications User Administration Agency Forms Uploaded Files

Edit Application

Save Save and Close Push To ServTraQ

Printable Application Application as Submitted Application as Current

Print << < Page 1 of 2 > >> PDF

Department of Community Services and Development			Official Use Only:	
Energy Intake Form			Priority Points	
CSD 43 (11/2015)			A.C.C.	
Agency:		Intake Initials:	Intake Date:	Eligibility Cert Date
				Job Control Code
First Name	Middle Initial	Last Name		Date of Birth
LAURA		GATES		MM/DD/YY 03/01/1957
Mailing Address				Unit Number
837 LIVE OAK AVENUE				APARTMENT 2
Mailing City	Mailing County	Mailing State	Mailing Zip Code	
MENLO PARK	SAN MATEO	CA	94025	
SERVICE ADDRESS – Address where applicant lives (this cannot be a P.O. Box)				
Is your service address the same as mailing address?				<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Have you lived at this residence during each of the past 12 months				<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Service Address				Unit Number
837 LIVE OAK AVENUE				APARTMENT 2
Service City	Service County	Service State	Service Zip Code	
MENLO PARK	SAN MATEO	CA	94025	




Printing an application will remove it from the list

Removing and Recovering Applications

Online LIHEAP Application Admin Panel Submitted Applications User Administration Agency Forms Uploaded Files

Submitted Applications List

Search

Edit	Download	Download Files	Agency	First Name	Last Name	Application Submitted	Application Status
			Central Coast Energy Services, Inc.	LAURA	GATES	9/8/2018 11:38:49 AM	IN PROGRESS

☒ [Printed Date] is blank

Checkmark the box and select a **Printed Date**

Processing Deficient Applications

Online LIHEAP Application Admin Panel Submitted Applications User Administration Agency Administration Agency Forms Uploaded Files Hello, adhoyos! Log off

2 Years & Younger: 1 Ages 3 to 5: 0
Ages 6 to 18: 1 Ages 19 to 59: 1
60 or Older: 0 Disabled: 1
Native American: 0 Farmworker: 1
Limited English: 0

Energy Bill

To which energy bill do you want the LIHEAP benefit to be applied?*

☐ Natural Gas ☒ Electricity ☐ Wood ☐ Propane ☐ Fuel Oil ☐ Kerosene

Utility to Pay*: PACIFIC GAS & ELECTRIC COMPANY

Account Number*: 12345678911

Bill Name: HORACIO MI HERNANDEZ
First Name Last Name

Bill Address: 135 AVIATION WAY WATSONVILLE 95076 CA
Address Line 1 Address Line 2 City Zip Code State

Bill Info: 30 \$0.00 N
Bill Num Days Supplied Amount Energy Cost Total Bill Amount Pledge Date RRP? RRP Exp. Date




Other Energy Account Information

What is the main fuel used to HEAT your home?*

☐ Natural Gas ☒ Electricity ☐ Wood ☐ Propane ☐ Fuel Oil ☐ Kerosene

Missing energy bill, income documents, etc.

Step 1) Download Application (As Entered)

Online LIHEAP Application Admin Panel							
Submitted Applications							
User Administration							
Agency Forms							
Uploaded Files							
Submitted Applications List							
Search							
Edit	Download	Download Files	Agency	First Name	Last Name	Application Submitted	Application Status
			Central Coast Energy Services, Inc.	LAURA	GATES	9/8/2018 11:38:49 AM	IN PROGRESS

- Attach deficient application letter

Step 2) Create or Look Up a Customer Record

SERVTRAQ
Local Solutions for California

Welcome 60000ANYguen ! [[Log Out](#)] [[Change Password](#)] [[Contact ServTraQ Support](#)]

Home
Contacts
Incoming Application Processing
Customer Search/Contact Entry
Callbacks
Customer Contacts
HEAP
Weatherization
Inventory
Reports
Analytics
Administration

Incoming Application Processing

Search Parameters

Barcode:
Name:
Social Security Number:
Mailing Address:
Mail Zip/City:

+ New Customer [Edit Customer](#)

Add Customer
New Customer

Customer Details

Name:
First Name MI Last Name
Social Security Number:
Date of Birth:
Ethnicity:
Primary Ethnicity Ethnicity Subcategory

Mailing Address

Line 1:
Address # Address Street/PO Box Street Type

Step 3) Add a Contact Entry Note

Contacts

Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date	Entered By
Contact Date: 2/12/2019 3:03:43 PM	Contact Type: OUTGOING	Contact Action: DEFICIENT APPLICATION PROCESS	Call Code: NO ACTION REQ - RECORD ONLY	Language: ENGLISH	Notes:	Mailing Code: IM - DEFICIENT (INCOMPLETE)		Entered By:

Deficiencies

Deficiency Reason	Deficiency Notes
Deficiency Reason:* MISSING/INCOMPLETE BILL	Deficiency Notes: MISSING PG&E BILL

Save (floppy disk icon) Cancel (red X icon)

Add a contact entry note for the deficient application

Alternative Deficient Form to Customer

Deficient Notification - Message (HTML)

File Message Insert Options Format Text Review Developer Design Layout Tell me what you want to do...

Clipboard Basic Text Names Include Tags Add-ins

From: Intake

To: Intake

Cc:

Subject: Deficient Notification

Hi,

The application submitted under **>ENTER CUSTOMER'S NAME<** could not be processed because it was incomplete or missing the required documents checked below:

Income Verification

☐ Proof of household income was not submitted. Please submit current copies of the household income for **all adult household members for the last 30 days**.

☐ Some proof income for the amount listed on the application was not submitted. Please submit proof of income for all of the income listed under the category of _____ in the amount of \$ ____.

☐ The income documents submitted are **outdated**. Please submit current copies of the household income for **all adult household members for the last 30 days**.

☐ The income documents submitted are unacceptable under State guidelines.

☐ No source of income for the household was submitted. Please submit a statement explaining how the household is supported without any source(s) of income.

☐ Other:

Energy Bill

☐ ALL PAGES of the most recent PG&E bill are required. Also submit the 15-day or 48-hour shut-off notice (if applicable).

☐ If the utilities are included in rent: Submit a letter from the property manager showing average monthly energy costs.

☐ Submit the most recent statement from the propane or wood supplier/most recent rent receipt for sub-metered energy costs.

☐ An outdated energy bill was submitted. Please submit the current energy bill dated within the last 30 days.

☐ The bill submitted covers less than 22 days of service. Re-submit the application with a copy of the next energy bill.

☐ Other:

Application

☐ The application was not signed.

☐ The application is missing the following required information: _____

☐ The Social Security number entered on the application is invalid, different than a previously submitted application under the customer's name, or is a social that according to our records belongs to someone else.

☐ Please submit a copy of the social security number.

☐ Other:

Please submit the requested information by fax or e-mail within 1 working day of this e-mail to avoid any further delays. If the information is not received in the allocated time, the application will be returned to the customer.

Thanks,
CCES Intake
Intake@energyservices.org

Adam De Hoyos
Central Coast Energy Services, Inc.

Email Form letters
can be saved with
Macros

QUESTIONS?

EMAIL US

Support@ServTraq.com

CALL US

[\(831\) 761-1747](tel:(831)761-1747)

CHAT WITH US

ServTraqAzure.com/Support.aspx