


## 3.2 Processing an Online Application

### **Step 1**

Open your Internet browser of choice and go to CALIHEAPApply.com Log in using your established credentials.

### 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](#) .

### **Step 2**

Click on **Administrative Panel**.

### Manage User Profile

**START A NEW LIHEAP APPLICATION**

**ADMINISTRATIVE PANEL**

**UPLOAD FILES**

### Step 3

This will lead to the **Submitted Applications List**. All UNPROCESSED online applications that have been submitted will appear here.

Online LIHEAP Application Admin Panel

Submitted Applications

User Administration

Agency Administration

Agency Forms

Uploaded Files

Uploader Users

Agency Settings

Hello, adhyos | Log off

Submitted Applications List

Search

Current View: In Progress Applications

Edit	Download	Download Files	Agency	First Name	Last Name	Application Submitted Date	Application Status	Emergency	County
<div></div>	<div></div>	<div></div>	Central Coast Energy Services, Inc.	ANGELA	KIM	4/28/2020 12:57:38 PM	IN PROGRESS	<div></div>	MONTEREY
<div></div>	<div></div>	<div></div>	Central Coast Energy Services, Inc.	ANGELA	NGUYEN	4/28/2020 11:25:27 AM	IN PROGRESS	<div></div>	MONTEREY

Page 1 of 1 (2 items)

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Page size: 10

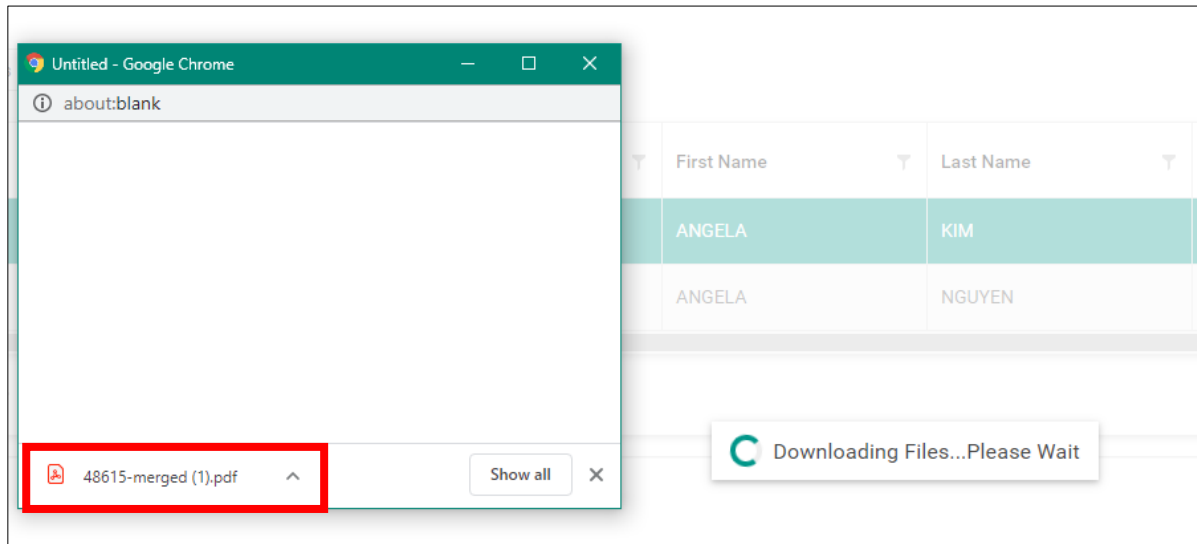
### Step 4

Click the **Download Arrow Icon** to view the customer's submitted documents. This file will include BOTH the customer's application (in the CSD 43 form) and all the submitted documents.

Submitted Applications List						
Current View: In Progress Applications						
Edit	Download	Download Files	Agency	First Name	Last Name	
			Central Coast Energy Services, Inc.	ANGELA	KIM	
			Central Coast Energy Services, Inc.	ANGELA	NGUYEN	
Page 1 of 1 (2 items) < 1 >						

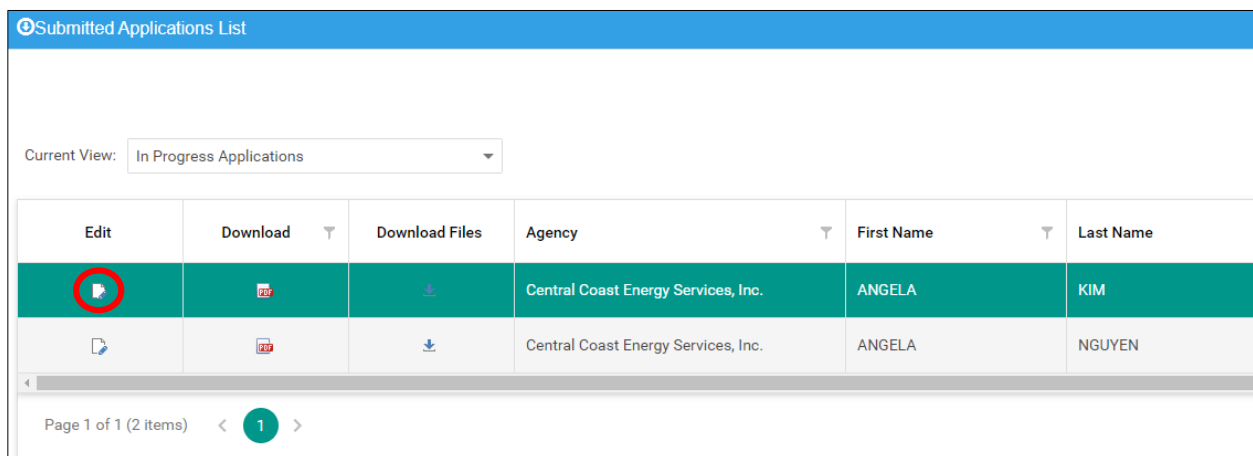
## Step 5

A separate window will open with the download file. Open the file to view the documents.



## Step 6

Click the **Edit** icon to continue processing.



## Step 7

This will lead to the “Edit Application” page. You will first see the customer’s application (as submitted) in the CSD 43 form.

Click on the **Application Data** tab.

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## Step 8

In this tab, you will see the customer's application as submitted, but the fields can be edited.

Use the customer's submitted documents to verify that all the required fields are entered correctly. Make any necessary changes and click **Save**.

**Edit Application**

**Save** **Save and Close** **Application Files** **Push To ServTraq**

[Printable Application](#) **Application Data**

**Applicant Data**

Name\*: ANGELA KIM

Social Security Number\*: 657-98-4321

Date of Birth\*: 2/2/1996

Primary Language\*: ENGLISH

Ethnicity\*:   
Primary Ethnicity Ethnicity Subcategory

Home Phone: (831) 869-6764

Message Phone: ( ) - -

Mobile Phone: ( ) - -

Email Address\*: angela.kn@yahoo.com

## Step 9

If the changes made under the “Application Data” tab were successful, this notification will appear. The CSD 43 form is now updated to reflect the new changes.

Click **Push to ServTraq** to transfer this entire application to ServTraq.

**Edit Application**

**Save** **Save and Close** **Application Files** **Push To ServTraq**

**Application saved successfully.**

[Printable Application](#) **Application Data**

1 of 2

Whole Page

**Department of Community Services and Development**

Energy Intake Form

CSD 43 (10/2017)

Agency: Central Coast Energy Services, Inc. Intake Initials: Intake Date: 4/28/2020

First Name: ANGELA Middle Initial: Last Name: Date of Birth: MM/DD/YY 02/02/1996

**Official Use Only:**

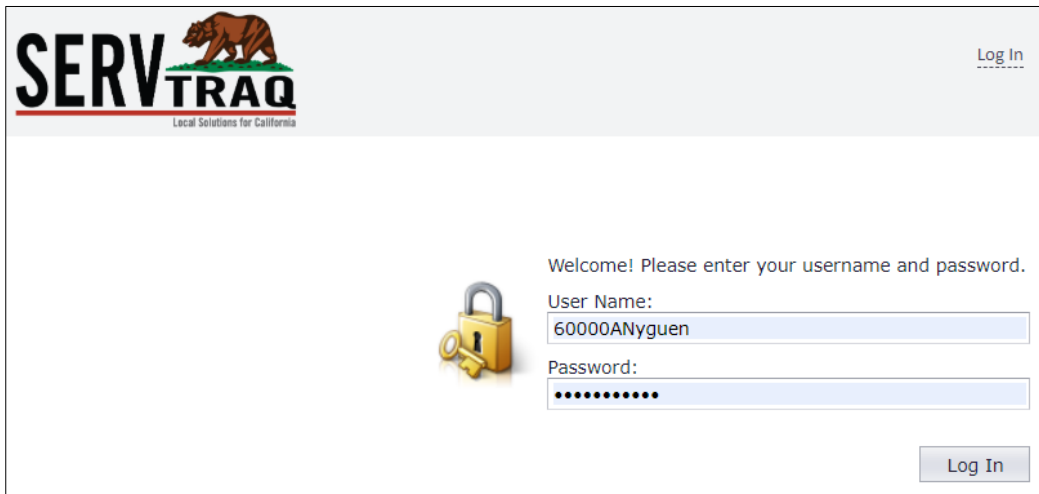
Priority Points

A.C.C.

Eligibility Cert Date

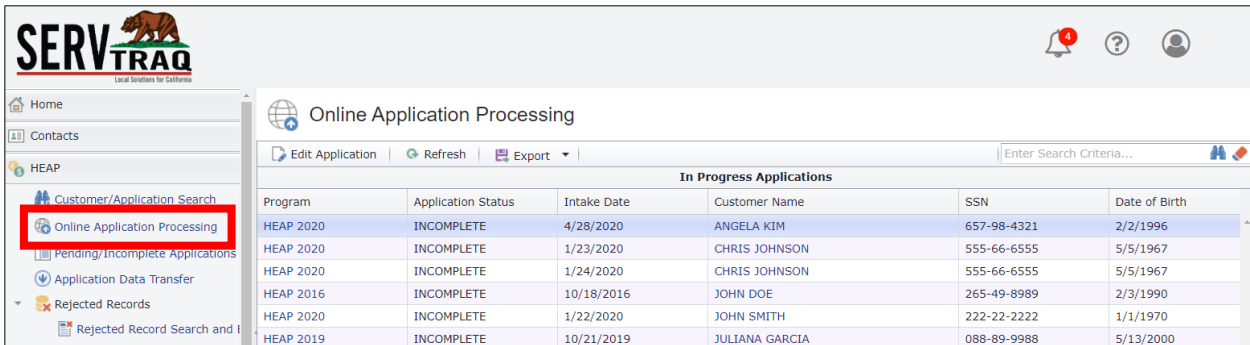
## Step 10

Go to ServTraq.com and login using your established credentials.



## Step 11




Under the HEAP tab, go to **Online Application Processing**. This section is all the online applications that have been “pushed” from the CALIHEAPApply portal. All applications in this section will appear with an *Incomplete* status.



Program	Application Status	Intake Date	Customer Name	SSN	Date of Birth
HEAP 2020	INCOMPLETE	4/28/2020	ANGELA KIM	657-98-4321	2/2/1996
HEAP 2020	INCOMPLETE	1/23/2020	CHRIS JOHNSON	555-66-6555	5/5/1967
HEAP 2020	INCOMPLETE	1/24/2020	CHRIS JOHNSON	555-66-6555	5/5/1967
HEAP 2016	INCOMPLETE	10/18/2016	JOHN DOE	265-49-8989	2/3/1990
HEAP 2020	INCOMPLETE	1/22/2020	JOHN SMITH	222-22-2222	1/1/1970
HEAP 2019	INCOMPLETE	10/21/2019	JULIANA GARCIA	088-89-9988	5/13/2000

## Step 12

To finish processing, select the application and click **Edit Application**.

Online Application Processing			
 Edit Application	 Refresh	 Export	Enter Search Criteria...
In Progress Applications			
Program	Application Status	Intake Date	Customer Name
HEAP 2020	INCOMPLETE	4/28/2020	ANGELA KIM
HEAP 2020	INCOMPLETE	1/23/2020	CHRIS JOHNSON
HEAP 2020	INCOMPLETE	1/24/2020	CHRIS JOHNSON
HEAP 2016	INCOMPLETE	10/18/2016	JOHN DOE
HEAP 2020	INCOMPLETE	1/22/2020	JOHN SMITH
HEAP 2019	INCOMPLETE	10/21/2019	JULIANA GARCIA

## Step 13

Review the application once again and ensure that all the required fields are entered correctly.

Change the **Status** from *Incomplete* to whichever status is appropriate. Click **Save and Close** to finish.

Save

Save and Close

Add a Job

Exit

Delete

Refresh

Validate Addresses

Sections

Program/Payment/Intake

Mailing Address

POS Address

Household

Electricity

Natural Gas

Wood/Propane/Oil

Additional Energy

Income

Performance Measures

Referrals

Rejections

Notes

Commitments

Recertifications

Files

CORE Status History

Edit Application

ANGELA KIM, ApplicationID - 119369

Program/Payment/Intake

Customer: ANGELA KIM

☐ Phone duplicate in PY?

Program: 2020

HEAP 2020

Program Year\*

Program\*

Status: INCOMPLETE

Application Status

Payment: \$0.00

\$0.00

\$0.00

Base Payment

Supp. Payment\*

Total Pay

Utility Paid: SAN DIEGO GAS & ELECTRIC (SDGE) - 8480530196

Priority Points: 0

Intake: ONLINE

4/28/2020

4/28/2020

Intake Location


Intake Date\*






Certificate

Language\*: ENGLISH


**Step 14**

If the online application was processed correctly, it will be removed from both the “Online Application Processing” section **AND** the CALIHEAPApply portal.




 **Online Application Processing**

 Edit Application |  Refresh |  Export ▼ |   

Program	Application Status	Intake Date	Customer Name
HEAP 2020	INCOMPLETE	1/23/2020	CHRIS JOHNSON
HEAP 2020	INCOMPLETE	1/24/2020	CHRIS JOHNSON
HEAP 2016	INCOMPLETE	10/18/2016	JOHN DOE
HEAP 2020	INCOMPLETE	1/22/2020	JOHN SMITH
HEAP 2019	INCOMPLETE	10/21/2019	JULIANA GARCIA

 Submitted Applications List

Current View:

Edit	Download	Download Files	Agency	First Name	Last Name
			Central Coast Energy Services, Inc.	ANGELA	NGUYEN

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