

## 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

*i* 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.

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

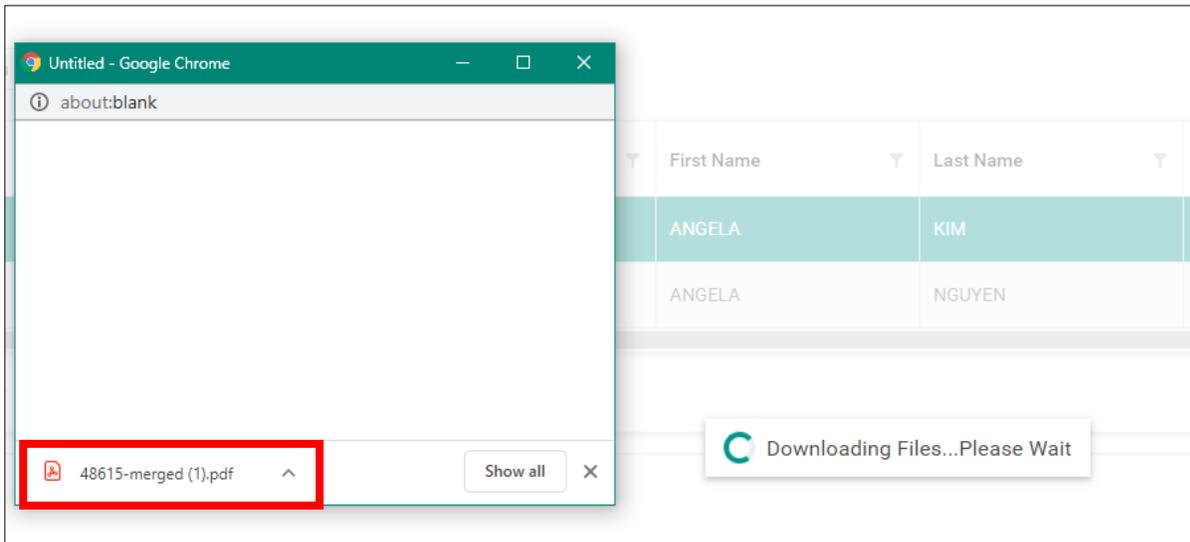
### Step 4

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.

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

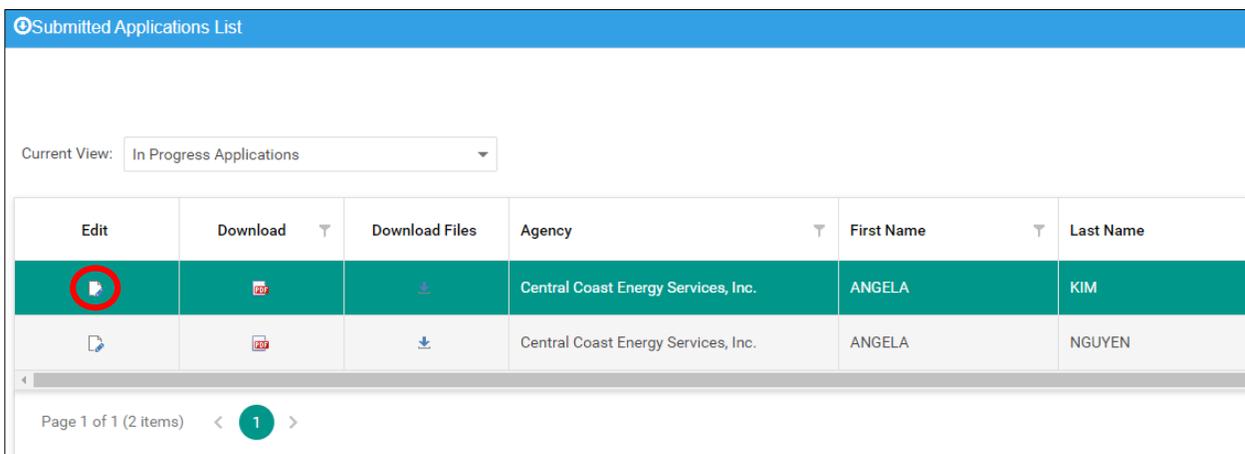
## Step 5

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.

Edit Application

Save Save and Close Application Files Push To ServTraq

Printable Application **Application Data**

1 of 2 Whole Page

<b>Department of Community Services and Development</b>			<i>Official Use Only:</i>	
Energy Intake Form			Priority Points	
CSD 43 (10/2017)			A.C.C.	
Agency: <b>Central Coast Energy Services, Inc.</b>		Intake Initials:	Intake Date: <b>4/28/2020</b>	Eligibility Cert Date
First Name	Middle Initial	Last Name		Date of Birth
<b>ANGELA</b>		<b>KIM</b>		MM/DD/YY <b>02/02/1996</b>
SERVICE ADDRESS – Address where applicant lives (this cannot be a P.O. Box)				
Service Address			Unit Number	
<b>100 BOSCO AVE</b>			<b>APT 3</b>	
Service City	Service County	Service State	Service Zip Code	
<b>MARINA</b>	<b>MONTEREY</b>	<b>CA</b>	<b>93933</b>	
Have you lived at this residence during each of the past 12 months?.....				<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Is your service address the same as mailing address?.....				<input checked="" type="checkbox"/> Yes <input type="checkbox"/> No
Mailing Address			Unit Number	
<b>100 BOSCO AVE</b>			<b>APT 3</b>	
Mailing Qty	Mailing County	Mailing State	Mailing Zip Code	
<b>MARINA</b>	<b>MONTEREY</b>	<b>CA</b>	<b>93933</b>	

## 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

<b>Department of Community Services and Development</b>			<i>Official Use Only:</i>	
Energy Intake Form			Priority Points	
CSD 43 (10/2017)			A.C.C.	
Agency: Central Coast Energy Services, Inc.	Intake Initials:	Intake Date: 4/28/2020	Eligibility Cert Date	
First Name	Middle Initial	Last Name	Date of Birth	
ANGELA			MM/DD/YY 02/02/1996	

## 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 (Program Year\*) | HEAP 2020 (Program\*)

Status: **INCOMPLETE** (Application Status)

Payment: \$0.00 (Base Payment) | \$0.00 (Supp. Payment\*) | \$0.00 (Total Pay)

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

Priority Points: 0

Intake: ONLINE (Intake Location) | 4/28/2020 (Intake Date\*) | 4/28/2020 (Certificat)

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	<input type="text" value="Enter Search Criteria..."/>  
In Progress Applications				
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: <input type="text" value="In Progress Applications"/>					
Edit	Download	Download Files	Agency	First Name	Last Name
			Central Coast Energy Services, Inc.	ANGELA	NGUYEN

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