



CA LIHEAP Apply

California's **Online** LIHEAP Application System


October 18, 2021

Today's Webinar

- Updates & New Features
- Changes on the Customer Side
- Changes on the Agency Side
- Live demo
- Q&A session

Updates & New Features

General Redesign



CALIFORNIA ONLINE LIHEAP APPLICATION

Register | Log in

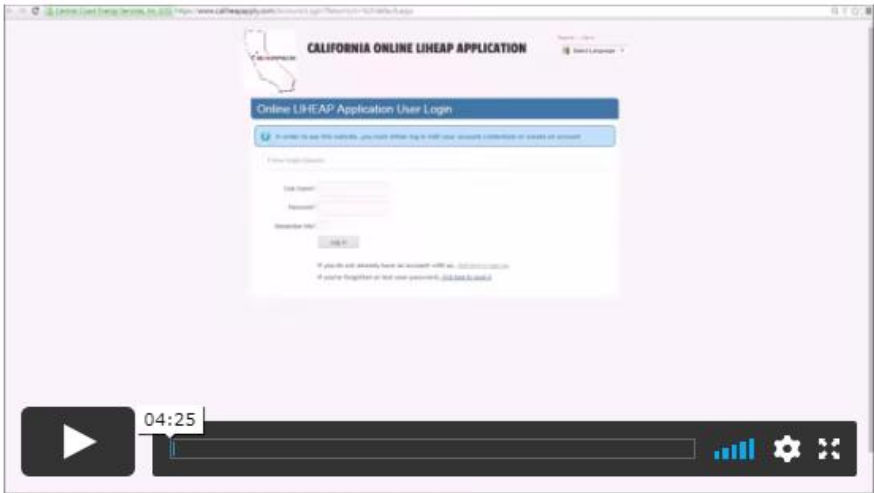
Select Language ▼

California Online LIHEAP Application Instructions


You are about to begin the application for the **Home Energy Assistance Program (HEAP)**


Please refer to the video instructions below before proceeding with the application

English




General Redesign


**CALIHEAPApply**
California's LIHEAP Application Portal



[Register](#) [Login](#)

 [Home](#) ^

- [Home](#) •
- [Find Services](#)

 [About](#) v

CALIHEAPApply.com - California's Online LIHEAP Application

Need help paying your energy bill?

Low-income Californians can apply for heating and cooling assistance under the Low Income Home Energy Assistance Program, or LIHEAP.

What is LIHEAP?

LIHEAP stands for the Low Income Home Energy Assistance Program; this program helps low-income people pay the cost of heating and cooling their homes.

LIHEAP is a federally funded program, and now more than ever, **many hard-working Californians can qualify.**

LIHEAP can offer a **one-time payment** to help you:

- Pay your heating or cooling bills, even if you use wood, propane, or oil.
- In an emergency or energy crisis, such as a utility disconnection.

In addition to help with paying your energy bill, LIHEAP can also provide in-home **weatherization services** for:

- Improved energy efficiency, and Health and Safety

Please watch the video below for applications instructions and valuable information

Mobile-Friendly

- Old mobile website displayed in desktop view
 - Required constant zooming and panning
 - Buttons and entry fields weren't immediately responsive

The screenshot shows a mobile browser interface with a status bar at the top displaying 9:35, signal strength, Wi-Fi, and battery. The address bar shows 'AA' and 'caliheapapply.com'. The website header includes a red navigation bar with links: COMPANY, SERVICES, APPLYING FOR HELP, and CONTACT/ABOUT. Below this is a logo for 'CCES' and the text 'CENTRAL COAST ENERGY SERVICES ONLINE LINEUP APPLICATION'. A sidebar on the left lists navigation options: APPLICANT INFORMATION, APPLICANT ADDRESSES, HOUSEHOLD INFORMATION, HOUSEHOLD INCOME, ENERGY ACCOUNT - ELECTRICITY, ENERGY ACCOUNT - NATURAL GAS, ENERGY ACCOUNT - WPG, UPLOAD DOCUMENTS, and APPLICATION SUMMARY. The main content area is titled 'Step 1: Applicant Information' and contains two sections: 'Applicant Details' and 'Contact Information'. The 'Applicant Details' section includes fields for Name (First Name: ANGELA, Last Name: NGUYEN), Social Security #, Date of Birth, Primary Language, and Applicant's Ethnicity. The 'Contact Information' section includes fields for Primary Phone #, Message Phone #, Alternate Phone #, Email Address (angela@energy-services.org), and a dropdown for 'What is the Best Time to Call You?'. A green 'NEXT' button is at the bottom right of the form. The footer of the page indicates 'Application version: 2.189.0.0'.

Mobile-Friendly

- New website formatted for ease and consistency across all devices

9:35
caliheapapply.com

CCES CENTRAL COAST ENERGY SERVICES ONLINE LINEAP APPLICATION

Step 1: Applicant Information

Applicant Details

Name: ANGELA NGUYEN
Social Security #:
Date of Birth:
Primary Language:
Applicant's Ethnicity:
Contact Information
Primary Phone #:
Message Phone:
Alternate Phone #:
Email Address: angela@energyservices.org
What is the Best Time to Call You?
NEXT

Application version: 2.189.0.0



11:36
ccesonlineapplicationcoreweb.azurewebsites.net — Private

Application - Applicant Information

Current Stage: Applicant Data
Progress: 0%

Jump to section...

First Name*
Angela

Middle Initial*
Middle Initial

Last Name*
Nguyen

Date of Birth*
May 3, 1996

Social Security Number*
899-99-9999

Return to Incomplete Applications

- Users can start an application, leave the site, and pick up where they left off
 - Notification provided upon log in
- Incomplete applications are held for 180 days
- *Only ONE application can be in progress at any given time*

Multi-Factor Authentication

- **Multi-Factor Authentication (MFA)** = additional security layer at time of account log in
 - Protects against stolen passwords/accounts
- Optional setting
 - If enabled, Google or Microsoft authenticator app is required

Multi-Factor Authentication

Verify Your Account

Your login uses multi-factor authentication with an authenticator app. Enter your authenticator code below.

Authenticator Code*



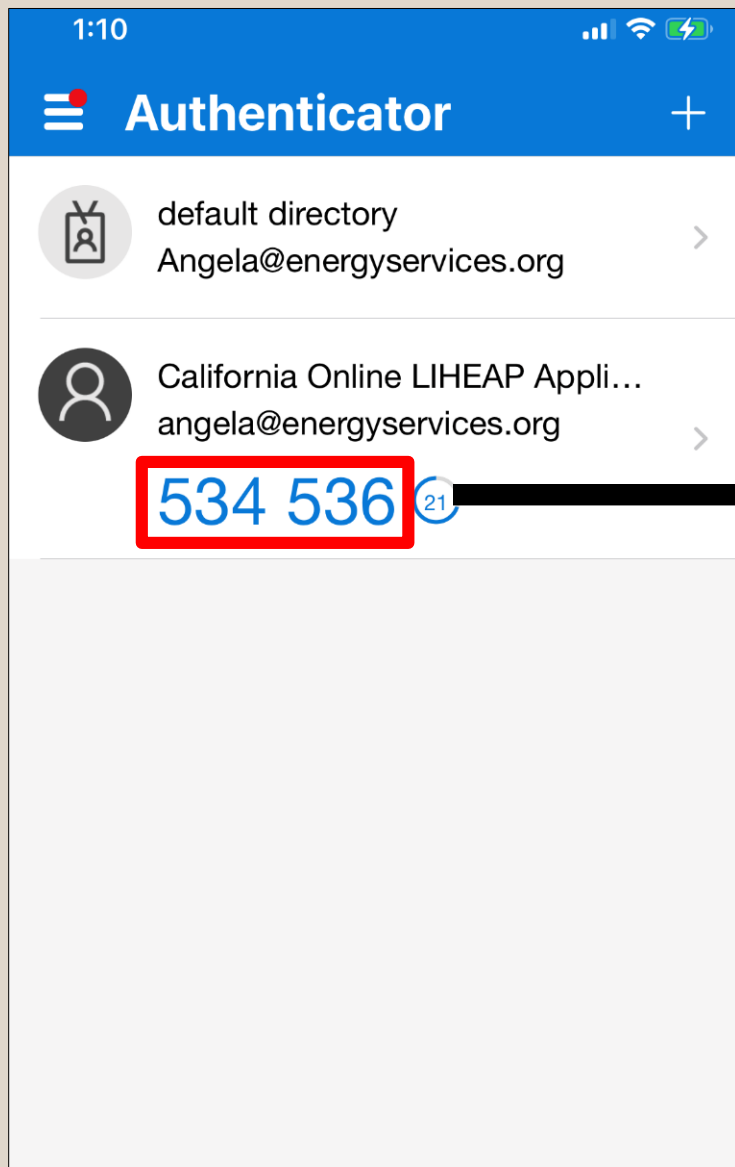
☐ Remember This Machine

Do not select this if you are using a public computer

Verify Code

Don't have access to your authenticator device? You can [log in with a recovery code](#).

Multi-Factor Authentication



Verify Your Account

Your login uses multi-factor authentication with an authenticator app.

Authenticator Code*

534536

☐ Remember This Machine

Do not select this if you are using a public computer

Verify Code

Don't have access to your authenticator device? You can [log in with a recovery code](#)

Integration of Additional CSD Reports

1. CSD 081 – Account Holder Authorization and Consent Form

- Required if the customer submitting the application is not the energy account holder
- Auto-generated based on data entered
- Form must be downloaded and uploaded along with required documents (if enabled)

Use CSD 081 for Electric/Gas Accounts where the applicant is not the account holder



Add a download link for a pre-filled CSD 081

Integration of Additional CSD Reports

2. CSD 43B – Certification of Income and Expenses

- Required if the customer reports zero income for the household
- Additional application step is auto-generated if no income is entered (if enabled)

Use CSD 43b for Zero Income Applications



Add an extra data entry form which will output a CSD 43b if an applicant reports zero countable income

Integration of Additional CSD Reports

3. CSD 321 – Client Education Confirmation of Receipt

- Additional step in the application process (if enabled)

Use CSD 321

☒ Display a page where the applicant must attest to receiving the downloads on the CSD 321

Lead Safe Education Download Url*

Enter the fully qualified url where users will get the lead safe education brochure - for example: <https://www.dropbox.com/hfjsdfsfsf.pdf>

Energy Education Download Url*

Enter the fully qualified url where users will get the energy education brochure - for example: <https://www.dropbox.com/hfjsdfsfsf.pdf>

Mold & Moisture Education Download Url*

Enter the fully qualified url where users will get the mold and moisture education brochure - for example: <https://www.dropbox.com/hfjsdfsfsf.pdf>

Budget Counseling Download Url*

Enter the fully qualified url where users will get the budget counseling brochure - for example: <https://www.dropbox.com/hfjsdfsfsf.pdf>

Radon Education Download Url*

Enter the fully qualified url where users will get the radon education brochure - for example: <https://www.dropbox.com/hfjsdfsfsf.pdf>

Integration of Additional CSD Reports

3. CSD 321 – Client Education Confirmation of Receipt

- Client education is provided at last step of the application process
- Download is required to submit application

Customer Resources

- No account required:
 - Online service availability lookup tool
 - Customer FAQ page
- Account required:
 - Local agency contact information

1. Online Service Availability Lookup

The screenshot displays the CALIHEAPApply website interface. On the left is a dark teal sidebar with the logo and text 'CALIHEAPApply California's LIHEAP Application Portal'. The sidebar contains a 'Home' link with a house icon and an 'About' link with an information icon. The main content area has a top navigation bar with 'Home / Find Services' and buttons for 'Register' and 'Login'. Below this is a 'Find Services' section. It features an information box stating: 'Important! County, City, and Zip Code are for your home address. They will be used to determine whether or not you can use this portal to apply.' Following this are three dropdown menus labeled 'County*', 'City*', and 'Zip Code*', each with the placeholder text 'Select the [County/City/Zip Code] where you live'. At the bottom of the form is a blue 'Find Services' button.

CALIHEAPApply
California's LIHEAP Application Portal

Home / Find Services

Find Services

i Important! County, City, and Zip Code are for your home address. They will be used to determine whether or not you can use this portal to apply.

County*

Select the California County where you live

City*

Select the City where you live

Zip Code*


Select the Zip Code where you live

Find Services

Online Service Availability Lookup

- Inputted location will show either:
 1. An active online application system in the area


Find Services



Success! Active Agency Found

The local service provider serving your area is Community Action Agency Of Butte County. You can apply for LIHEAP using this portal.

[Register to Apply](#)




Online Service Availability Lookup

OR


2. Link to CSD's LIHEAP agency search tool

Find Services




Agency Not Found


Error! There is not an active agency in your service territory so you cannot apply for LIHEAP through this portal







Find Your Local Service Provider


2. Customer FAQ


**CALIHEAPApply**
California's LIHEAP Application Portal






 Home

 Administration

 Account

 About

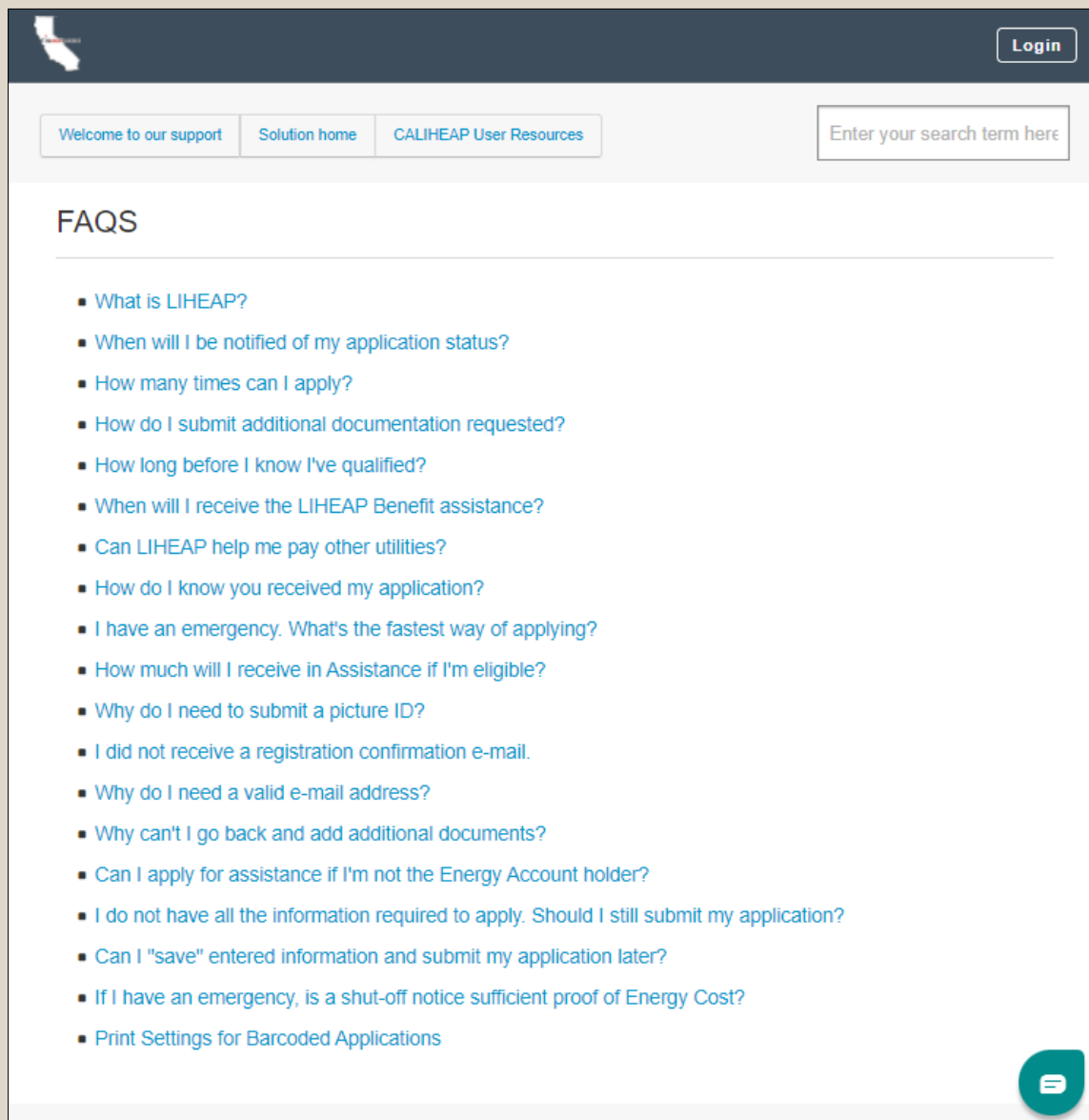
- FAQ
- Privacy
- Terms of Use

Home / About / FAQ

FAQ

For the most up to date FAQ and other support solutions, please visit our integrated support website [here](#)

Customer FAQ






The screenshot shows the LIHEAP Customer FAQ page. At the top, there is a dark blue header with a California map icon and a 'Login' button. Below the header, there are three navigation links: 'Welcome to our support', 'Solution home', and 'CALIHEAP User Resources'. A search bar with the placeholder text 'Enter your search term here' is located on the right. The main content area is titled 'FAQS' and contains a list of 20 frequently asked questions. A green chat icon is visible in the bottom right corner of the page.

FAQS


- What is LIHEAP?
- When will I be notified of my application status?
- How many times can I apply?
- How do I submit additional documentation requested?
- How long before I know I've qualified?
- When will I receive the LIHEAP Benefit assistance?
- Can LIHEAP help me pay other utilities?
- How do I know you received my application?
- I have an emergency. What's the fastest way of applying?
- How much will I receive in Assistance if I'm eligible?
- Why do I need to submit a picture ID?
- I did not receive a registration confirmation e-mail.
- Why do I need a valid e-mail address?
- Why can't I go back and add additional documents?
- Can I apply for assistance if I'm not the Energy Account holder?
- I do not have all the information required to apply. Should I still submit my application?
- Can I "save" entered information and submit my application later?
- If I have an emergency, is a shut-off notice sufficient proof of Energy Cost?
- Print Settings for Barcoded Applications

- LIHEAP basics
- Requested documents
- Application status
- Benefit award timeline
- Account registration
- ❖ Includes direct link to create a support ticket

3. Agency Contact Info

CALIHEAPApply.com - California's Online

 Start a New LIHEAP Application

Need help paying your energy bill?
Low-income Californians can apply for heating and cooling assistance, the Energy Assistance Program, or LIHEAP.

What is LIHEAP?
LIHEAP stands for the Low Income Home Energy Assistance Program. It helps low-income people pay the cost of heating and cooling their homes.
LIHEAP is a federally funded program, and now more than ever, it helps people qualify.

LIHEAP can offer a **one-time payment** to help you:

- Pay your heating or cooling bills, even if you use wood, propane, or oil.
- In an emergency or energy crisis, such as a utility disconnection.

Angela Nguyen
angela@energyservices.org


User Profile

Settings

Logout

Your Local Service Provider

Central Coast Energy Services, Inc.
(831) 761-7080

 **CCES**

Website

Changes to Customer Side

Improvements to Customer Side

- Overall application submission process is the same
- General design changes for convenience
- Inclusion of CSD reports (if enabled)

Design Change



APPLICANT INFORMATION



APPLICANT ADDRESSES



HOUSEHOLD INFORMATION



HOUSEHOLD INCOME



ENERGY ACCOUNT - ELECTRICITY



ENERGY ACCOUNT - NATURAL GAS



ENERGY ACCOUNT - WPO



UPLOAD DOCUMENTS



APPLICATION SUMMARY



Step 1: Applicant Information

Applicant Details

Name: ANGELA

First Name*

MI

NGUYEN

Last Name*

Social Security #*:

__-__-__

Date of Birth*:

▼

Primary Language*:

▼

Applicant's Ethnicity:

▼

Primary Ethnicity

▼

Ethnicity Subcategory

Contact Information

Primary Phone #*:

(__) __-__

Message Phone:

(__) __-__

Alternate Phone #:

(__) __-__

Email Address:

angela@energyservices.org

What is the Best Time
to Call You?:

▼

NEXT >

Design Change

[Home](#) / [Account](#) / [User Profile](#) / [My Applications](#) / [Application](#)

Application - Applicant Information

Application Progress

- Applicant
- Contact Info
- Mailing Address
- Home Address
- Household
- Income
- Energy - General
- Electric Account
- Natural Gas Account
- Wood/Propane/Fuel Oil
- Supporting Documents
- Review

First Name*

Angela

Middle Initial*

K

Last Name*

Nguyen

Date of Birth*

5/3/1996



Social Security Number*

899-99-9999

Ethnicity

Select your ethnicity

Ethnicity Subcategory

Select your ethnicity subcategory

Save and Continue

Additional Step for CSD 43B

Application - Income - Zero Income Certification

Application Progress

Applicant

Contact Info

Mailing Address

Home Address

Household

Income

Energy - General

Electric Account

Natural Gas Account

Wood/Propane/Fuel
Oil

Supporting
Documents

Review



Success!

Your application progress has been saved. Should you need to exit, your progress has been saved and you can pick up where you left off the next time you sign in.



Certification of Income and Expenses



You are being asked to complete this form because you requested assistance, and state that your entire household cannot provide proof of income. The State of California requires the applicant to report all sources of income. This form will help us understand how you are meeting expenses. Please complete the information below.

Section 1: Do you have sources of income you forgot to report?

During the previous month have you been employed part time?*

☐ Yes ☐ No

During the previous month have you been self-employed?*

☐ Yes ☐ No

During the previous month did you receive money for any work that you perform only once in a while, like yard work, child care, donating blood, etc?*

☐ Yes ☐ No

During the previous month have you received any gifts of money from anyone?*

☐ Yes ☐ No

During the previous month did you receive any of the following: (select any that apply)*

CSD 081 Found in Energy Section

Application - Household Energy - Electric

Application Progress

Applicant

Contact Info

Mailing Address

Home Address

Household

Income

Energy - General

Electric Account

Natural Gas Account

Wood/Propane/Fuel
Oil

Supporting
Documents

Review



Success!

Your application progress has been saved. Should you need to exit, your progress has been saved and you can pick up where you left off the next time you sign in.



Choose one of the following two options regarding your household electricity service*

☐ I have electric service ☐ I do NOT have electric service

Electric energy provider*

Select the utility provider that you use for electricity

Enter Your Electric Account Number*

Account Number

Is your electricity shut off?*

☐ Yes ☐ No

Do you have a past due notice on your household electric account?*

☐ Yes ☐ No

Are you the account holder for your household electric account?*

☐ Yes ☒ No

Account Holder First Name*

Different

Account Holder Last Name*

Person

Download Required Form



CSD 081 Download

Are you the account holder for your household electric account?*

☐ Yes ☒ No

Account Holder First Name*

Different

Account Holder Last Name*

Person

Download Required Form



CSD 081

Electric-CSD081 (1).pdf

1 / 1

94%

Department of Community Services and Development

Account Holder Authorization and Consent Form

CSD Form 081 (Rev. 12/17)

ACCOUNT HOLDER NAME(S) AND MAILING ADDRESS

Account Holder's Full Name		
Different Person		
Account Holder's Mailing Address (Street)		Unit Number (If Any)
City	State	Zip Code
Is the utility service address the same as the account holder's mailing address? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Full Name of Applicant for Benefits		
Angela Nguyen		
Utility Service Address (Street)		Unit Number (If Any)
900 Kelldon Drive		Apt 5
City	State	Zip Code
Monterey	CA	93940

UTILITY INFORMATION

Please enter your utility company name and service account number below (you can find the account number on your bill). If different companies provide your electricity and gas services, please enter the name and account number for both utilities.

Name of Utility Company	Service Account Number
Name of Utility Company	Service Account Number

Application - Client Education Confirmation

☰

Application Progress

Applicant

Contact Info

Mailing Address

Home Address

Household

Income

Energy - General

Electric Account

Natural Gas Account

Wood/Propane/Fuel Oil

Supporting Documents

Application Review



Success!

Your application progress has been saved. Should you need to exit, your progress has been saved and you can pick up where you left off the next time you sign in.



Important! Download Required Forms

Please download the following required forms. By downloading them you confirm receipt of required education brochures.

Lead-Safe Weatherization

A copy of the pamphlet, Renovate Right: Important Lead Hazard Information for Families, Child Care Providers, and Schools, informing me of the potential risk of the lead hazard exposure from weatherization/renovation activity to be performed in my dwelling unit.

Download Form

Energy Education

Information regarding changes I can make in order to reduce the energy consumption of my household.

Download Form

Mold and Moisture Education

A copy of the pamphlet, A Brief Guide to Mold and Moisture In Your Home, informing me of how to clean up residential mold problems and how to prevent mold growth.

Download Form

Budget Counseling

Information regarding personal financial management.

Download Form

Radon Education

A copy of the pamphlet, A Citizen's Guide to Radon, informing me of the potential risk of radon and how to lower the radon level in my dwelling unit.

Download Form

I confirm that I have downloaded the above educational brochures

☐

Yes

☐

No

< Back

Save and Continue



Application Review Page

Application - Review and Submit

Application Progress

Applicant

Contact Info

Mailing Address

Home Address

Household

Income

Energy - General

Electric Account

Natural Gas Account

Wood/Propane/Fuel Oil

Supporting Documents

Review

Success!

Your application progress has been saved. Should you need to exit, your progress has been saved and you can pick up where you left off the next time you sign in.

Applicant Information

Edit

First Name	Middle Initial	Last Name	
Angela	K	Nguyen	
Date of Birth	SSN	Language	
5/3/1996	XXX-XX-9999	English	
Ethnicity	Ethnicity Subcategory		

Mailing Address

Edit

Address Line 1		Address Line 2	
900 Kelldon Drive		Apt 5	
City	State	Zip Code	County
Monterey	CA	93945	Monterey

Physical (Home) Address

Edit

Address Line 1		Address Line 2	
900 Kelldon Drive		Apt 5	
City	State	Zip Code	County
Monterey	CA	93940	Monterey

Contact Information

Edit

Home Phone	Message Phone	Alternate Phone
(182) 490-1289		(831) 999-9999
Email Address	What is the best time to reach you	
angela@energyservices.org	Morning	

Household

Edit

First Name	Last Name	Relation to Applicant	Date Of Birth	Source of Income	Monthly Income
------------	-----------	-----------------------	---------------	------------------	----------------

Changes to Agency Side

Changes to Agency Side

- Overall application processing has not changed
- General design changes for convenience
- New features:
 - View status history of an application
 - Ability to download customer's signed CSD reports

View Customer's Uploaded Documents

Home / Admin / Application Admin

Application Admin

Current View: In Progress Applications

Application Details

Select a Download Type

Details	Agency	First Name	Last Name	Download Date
	Central Coast Energy Services, Inc.			
	Central Coast Energy Services, Inc.			
	Central Coast Energy Services, Inc.			
	Central Coast Energy Services, Inc.			7/16/2021, 10:20 AM
	Central Coast Energy Services, Inc.			6/29/2021, 10:42 AM
	Central Coast Energy Services, Inc.			6/29/2021, 10:31 AM


Select a Download Type







- Merged Report - All Docs
- CSD43
- Zip File - All Docs

Open a Submitted Application

Home / Admin / Application Admin

Application Admin

Current View: In Progress Applications  Application Details Select a Download Type

Details	Agency	First Name	Last Name	Application Submitted
	Central Coast Energy Services, Inc.			10/15/2021, 1:27 PM
	Central Coast Energy Services, Inc.			10/15/2021, 12:52 PM
	Central Coast Energy Services, Inc.			10/12/2021, 9:06 AM
	Central Coast Energy Services, Inc.			7/16/2021, 10:20 AM
	Central Coast Energy Services, Inc.			6/29/2021, 10:42 AM
	Central Coast Energy Services, Inc.			6/29/2021, 10:31 AM

Additional Application Details

Application Admin

Current View: Unprinted Applications

Application Details

Select a Download Type

Download Selected Report

Export to Excel

Search...

Details	Agency	First Name	Last Name	Application Submitted Date	Application Status	Emergency	County	Printed Date	
	Central Coast Energy Services, Inc.	ANTON	DIANOV	3/11/2021, 11:48 AM	Transferred	<input checked="" type="checkbox"/>	San Mateo		...

Serv Traq Export Date: 3/15/2021, 8:32 AM

Status Date: 3/20/2021, 11:56 AM

Priority Points: 23

- View all column headers on one page

Application Details

Application Details

< Application List

Save

Save and Close

Files

Push to ServTrac

Close Application

Select a Report to Download ▾

Current



Submitted Date

10/15/2021 1:27 PM

Current Status

In Progress

Status Date

10/15/2021 1:27 PM

Application Status History

Status	Status Date	Applicant Notified Date
In Progress	10/15/2021, 1:27 PM	10/15/2021, 1:27 PM

Applicant



Contact Info



- Collapse and expand customer's application sections

Application Status History

Application Details

[← Application List](#)
[Save](#)
[Save and Close](#)
[Files](#)
[Push to ServTraq](#)
[Close Application](#)
[Select a Report to Download ▾](#)

Current

Submitted Date

4/12/2021 12:48 AM

Current Status

Corrected

Status Date

4/12/2021 6:21 PM

Application Status History

Status	Status Date	Applicant Notified Date
Corrected	4/12/2021, 6:21 PM	
Deficient	4/12/2021, 3:37 PM	4/12/2021, 3:38 PM
In Progress	4/12/2021, 12:48 AM	4/12/2021, 12:48 AM

- Keep track of deficiency and correction history

Downloading the CSD Reports

Application Details

< Application List

Save

Save and Close

Files

Push to ServTraQ

Close Application

Select a Report to Download

Current

Submitted Date

10/15/2021 1:27 PM

Current Status

In Progress

Status I

10/15/2021 1:27 PM

Application Status History

Status	Status Date	Applicant Notified Date
In Progress	10/15/2021, 1:27 PM	10/15/2021, 1:27 PM

Select a Report to Download

CSD 43

CSD 43B

- Download completed/signed CSD forms from the application details page



Thank you for attending!

Support@ServTraq.com

(831) 761-1747

October 18, 2021