CA LIHEAP Apply

California's Online LIHEAP Application System
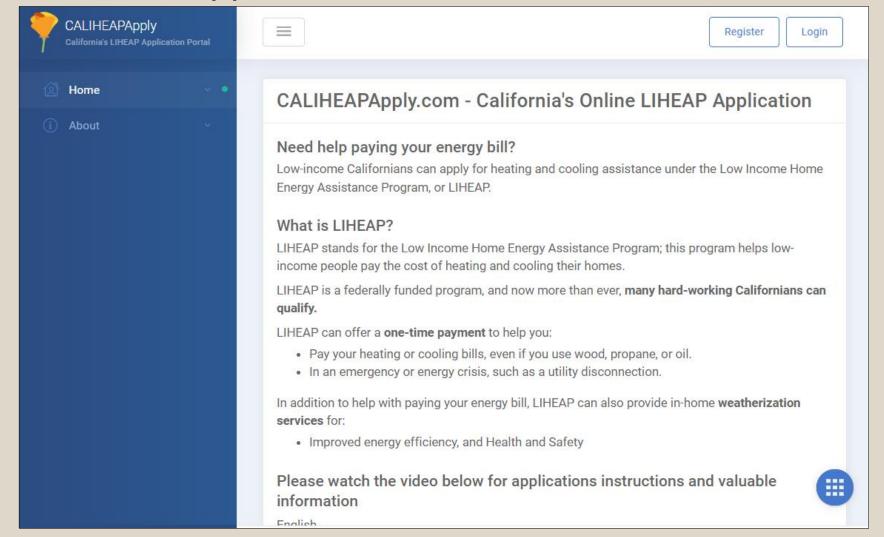
February 29, 2024

Today's Webinar

- General and agency-specific features

- How to process an online application

- How to manage a deficient application

- Agency administration features

- How the system works with ServTraq

- FAQ

- Q&A session
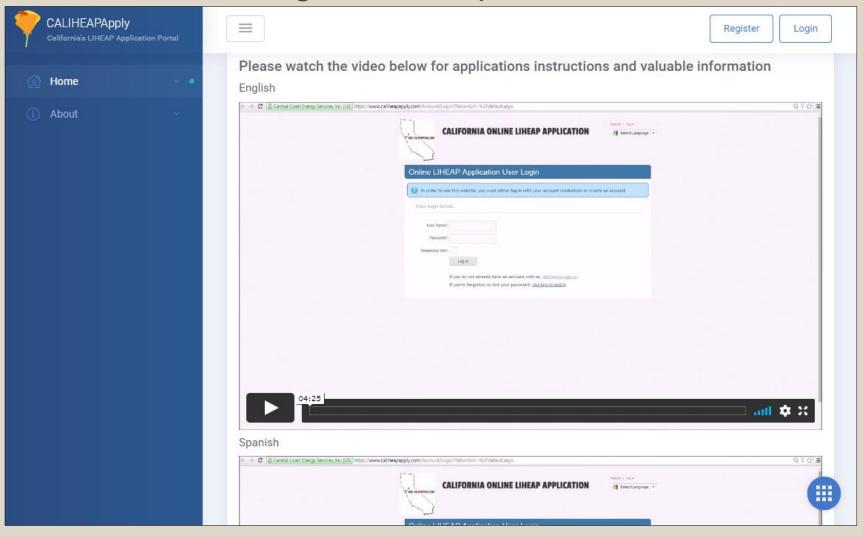
- Live Demo

Features

1. Home Page

- LIHEAP and application overview
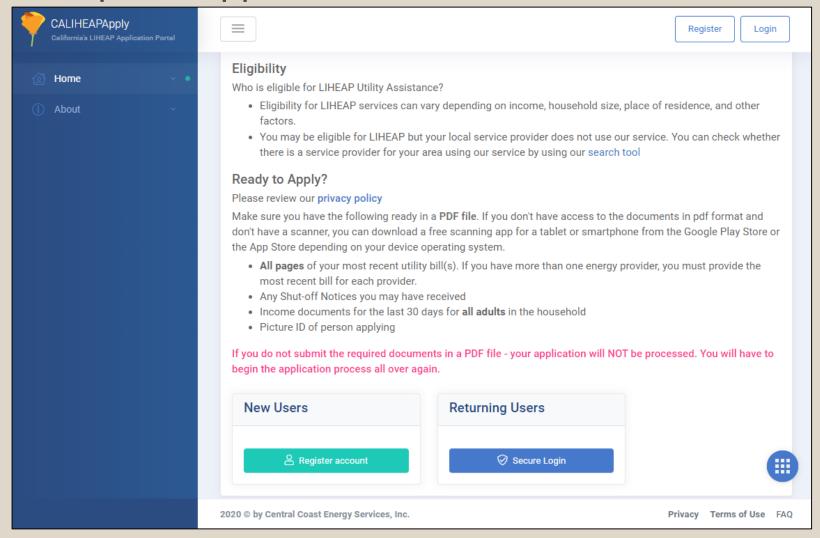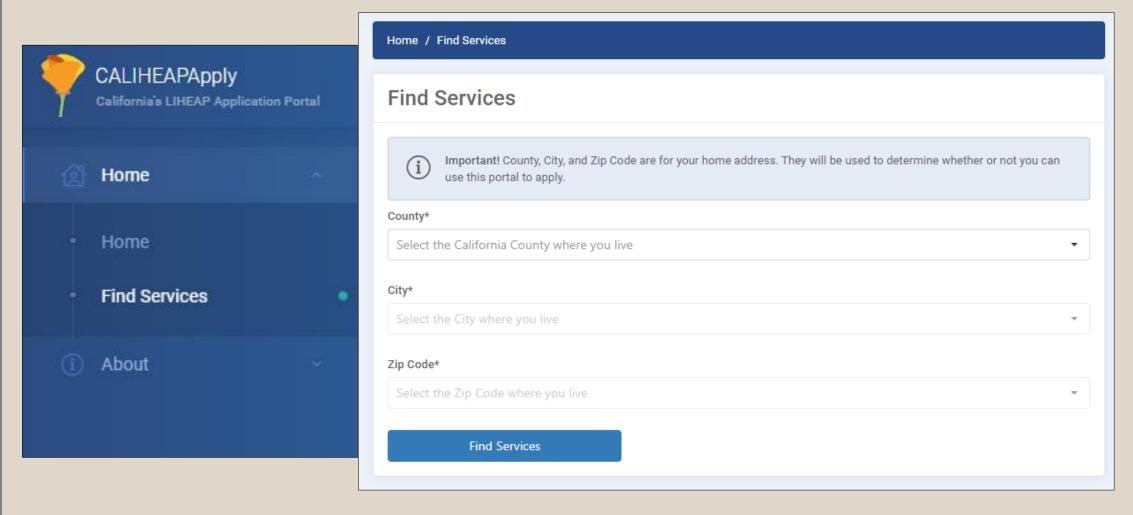
1. Home Page

- Video tutorials in English and Spanish

1. Home Page

- List of required application documents

2. Find Services
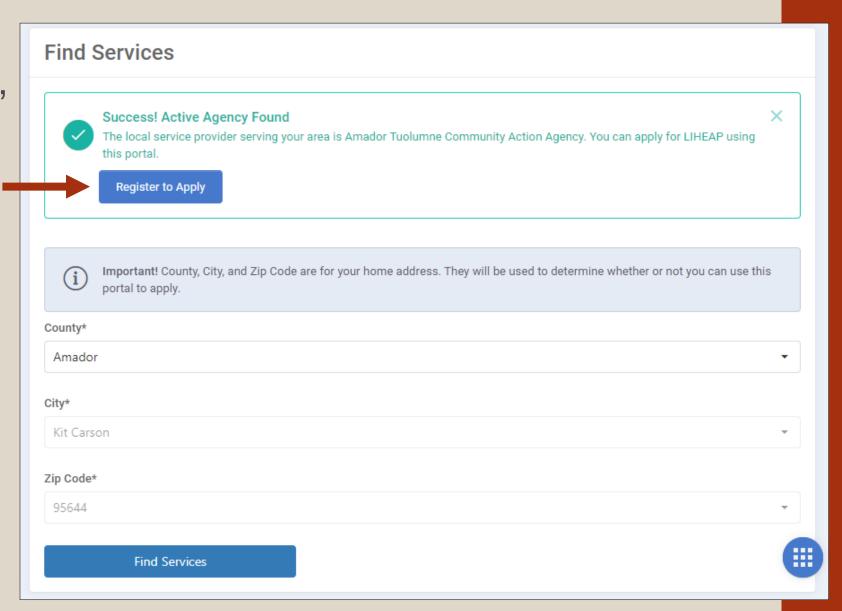
- Find local LIHEAP application

2. Find Services
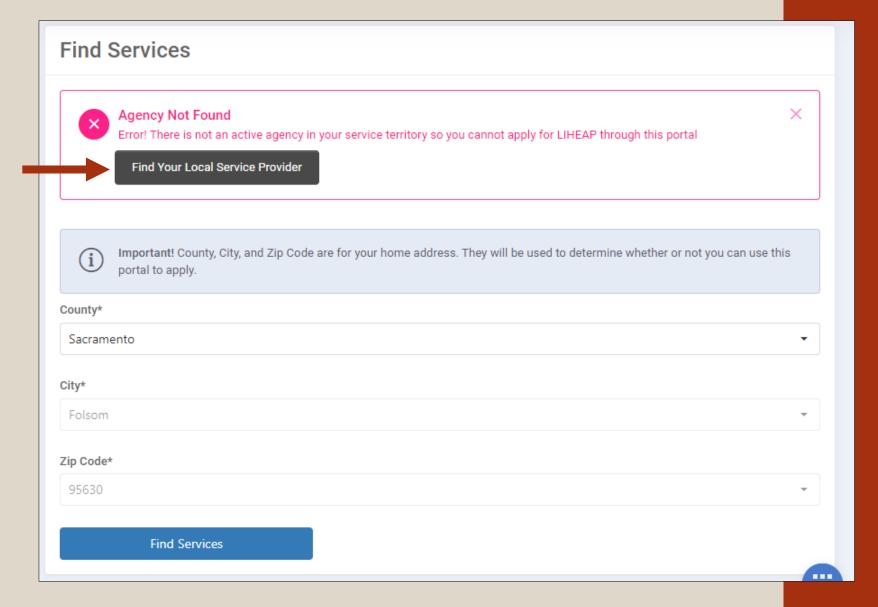
- If local app found, registration link will appear

2. Find Services

- If local app not found, link to CSD website will appear

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]

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*
Sacramento ▾

City*
Folsom ▾

Zip Code*
95630 ▾

[Find Services]

2. Find Services

3. FAQ Section

- Compilation of commonly asked questions by customers

- In process of being updated

3. FAQ Section

- If their question is not listed, customers have access to the online application support portal
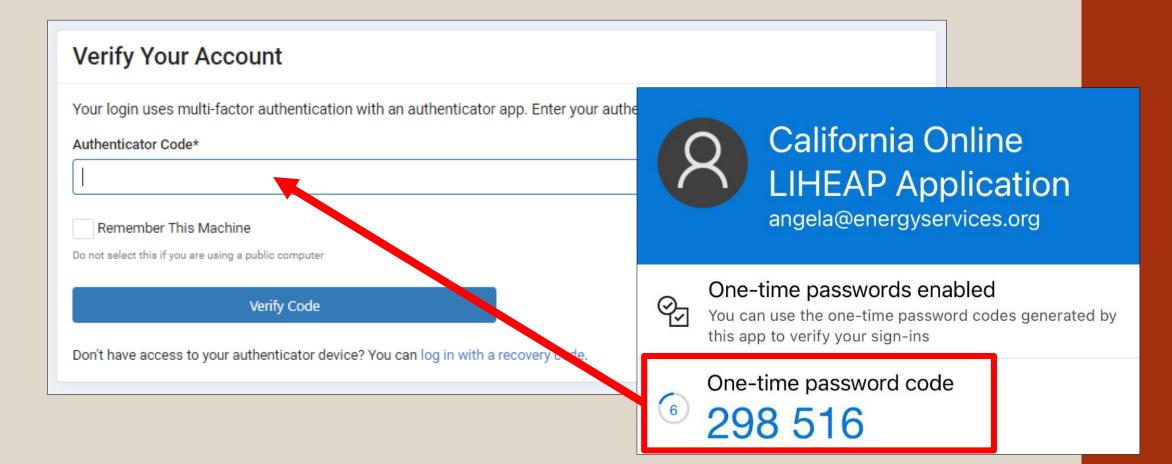
4. Multi-Factor Authentication

Secure User Login

Username/Email Address*

> angie135

Password*

> ••••••••••••

☐ Remember Me?

Login

If you do not have an account with us, click here to create one.
If you've forgotten or lost your password, click here to reset it.

4. Multi-Factor Authentication

- Option to activate multi-factor authentication
- via Microsoft or Google authentication app

Agency-Specific Features

- Ability to add agency-specific forms and client education documents
- Examples:
  - Energy use survey
  - Statement from self-employed applicants
  - Landlord confirmation of utilities included in rent
  - Weatherization fact sheet
  - Energy conservation tips
  - Household budgeting worksheet

Agency-Specific Features

- Integration of forms:
    - CSD 43B – Zero income verification
    - CSD 81 – Energy account holder
    - CSD 600 – Citizenship/Residency Status
    - CSD 321 – Received agency's materials
- Allow submission of multiple applications
- Expansion of income and demographic data fields (CSBG)
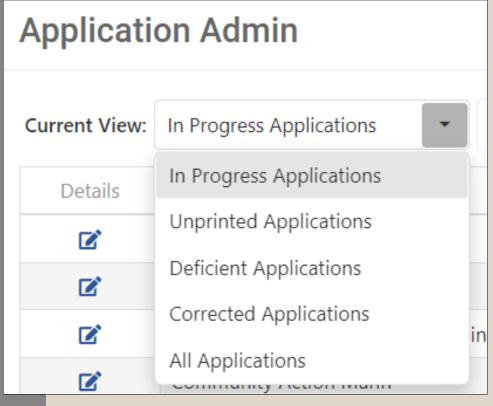
Automated Notification Emails

- Customers will receive a notification email when:
  - They submit an online application
  - A pledge is made on their utility account
  - Their application is manually "Closed" on the portal
  - Their application is "Deficient" and additional documents were requested
  - Their application is Denied in ServTraq
  - Their application has been transferred to CORE

What the System Looks Like for Staff

Application List View

Application Admin

Current View: In Progress Applications ▾

In Progress Applications
Unprinted Applications
Deficient Applications
Corrected Applications
All Applications
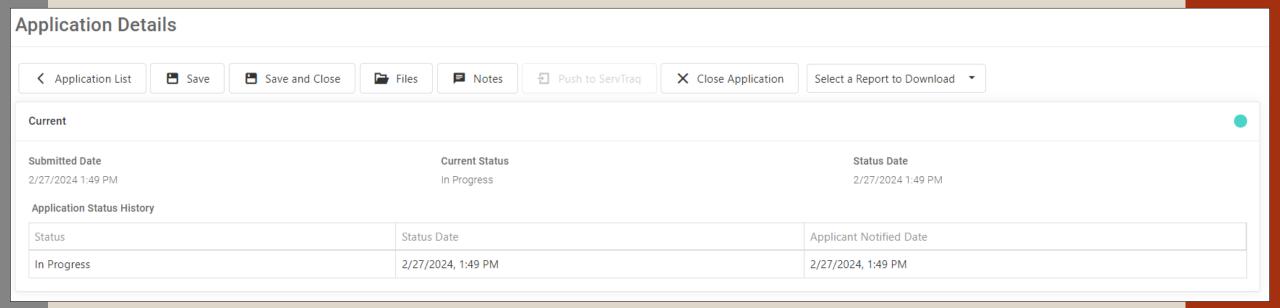
- **In Progress**: applications that are currently being processed or have not yet been processed

- **Unprinted**: applications that have not been printed

- **Deficient**: applications with missing required documents

- **Corrected**: applications where customers have provided their missing document(s)
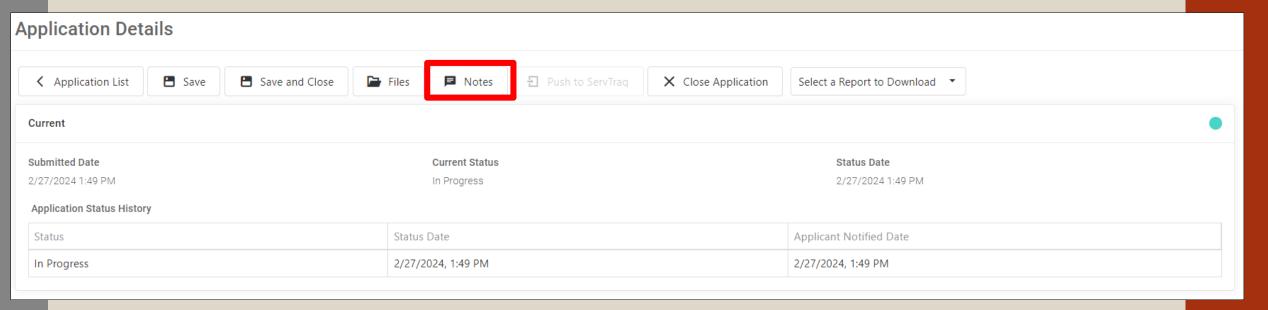
Application View & Sections

Application Details

| ‹ Application List | 🖫 Save | 🖫 Save and Close | 📂 Files | 🗩 Notes | ↴ Push to ServTraq | ✕ Close Application | Select a Report to Download ▾ |

Current ●

Submitted Date
2/27/2024 1:49 PM

Current Status
In Progress

Status Date
2/27/2024 1:49 PM

Application Status History

Status	Status Date	Applicant Notified Date
In Progress	2/27/2024, 1:49 PM	2/27/2024, 1:49 PM

- Includes:
  - Customer-inputted data
  - Section for files and notes
  - Downloadable reports/forms
  - Status history
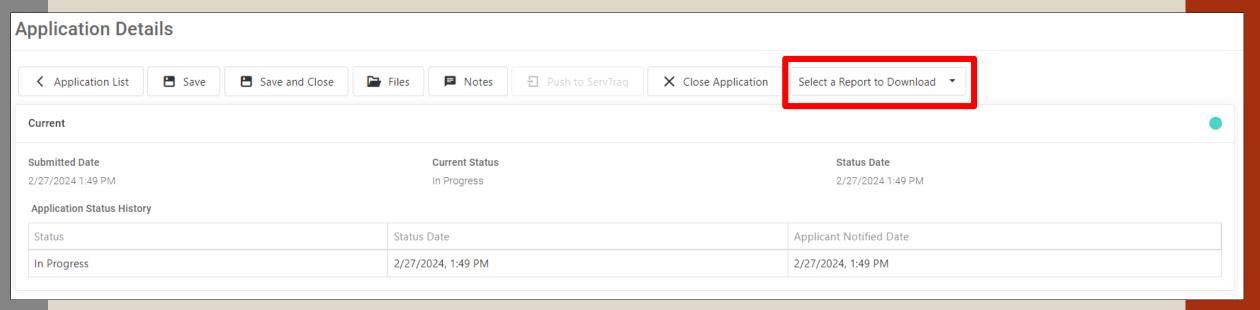
Add Notes to An Application

Application Details

| < Application List | 🖫 Save | 🖫 Save and Close | 📂 Files | 💬 **Notes** | ⊡ Push to ServTraq | ✕ Close Application | Select a Report to Download ▾ |

Current ●

Submitted Date
2/27/2024 1:49 PM

Current Status
In Progress

Status Date
2/27/2024 1:49 PM

Application Status History

Status	Status Date	Applicant Notified Date
In Progress	2/27/2024, 1:49 PM	2/27/2024, 1:49 PM

- Staff can leave comments on individual applications
- Only the user that added a note can delete it
- Users with Admin permissions can see all deleted notes
- Notes are not pushed to ServTraq

Available Customer Reports

Application Details

| < Application List | 🖫 Save | 🖫 Save and Close | 🗁 Files | 🏳 Notes | ⤒ Push to ServTraq | ✕ Close Application | Select a Report to Download ▾ |

Current ●

Submitted Date	Current Status	Status Date
2/27/2024 1:49 PM	In Progress	2/27/2024 1:49 PM

Application Status History

Status	Status Date	Applicant Notified Date
In Progress	2/27/2024, 1:49 PM	2/27/2024, 1:49 PM
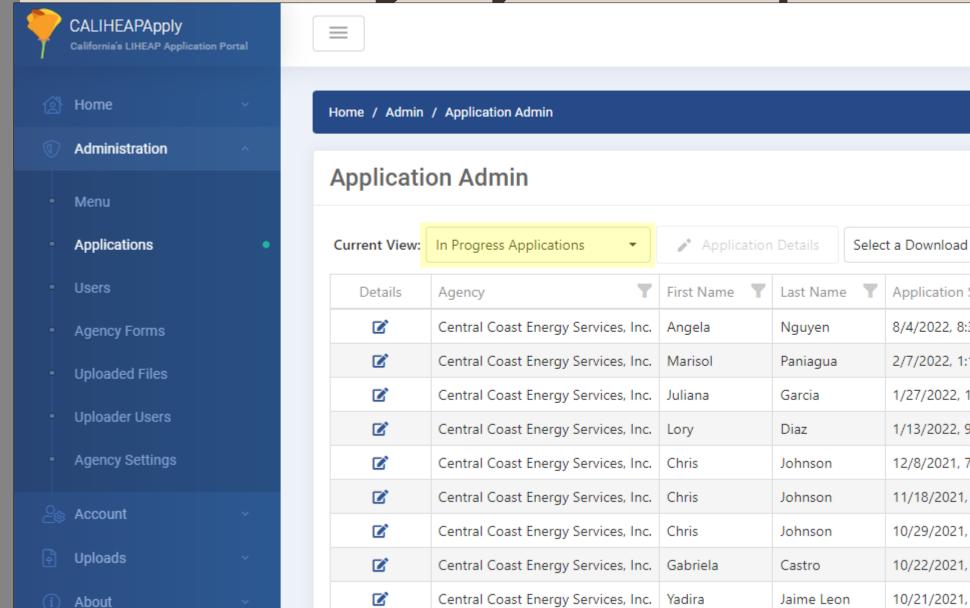
- All automated forms (if applicable) will be found here
  - CSD 43B – Zero income verification
  - CSD 81 – Energy account holder
  - CSD 600 – Citizenship/Residency Status
  - CSD 321 – Received agency's materials

Processing a Submitted COMPLETE Application

Agency Side – Step 1
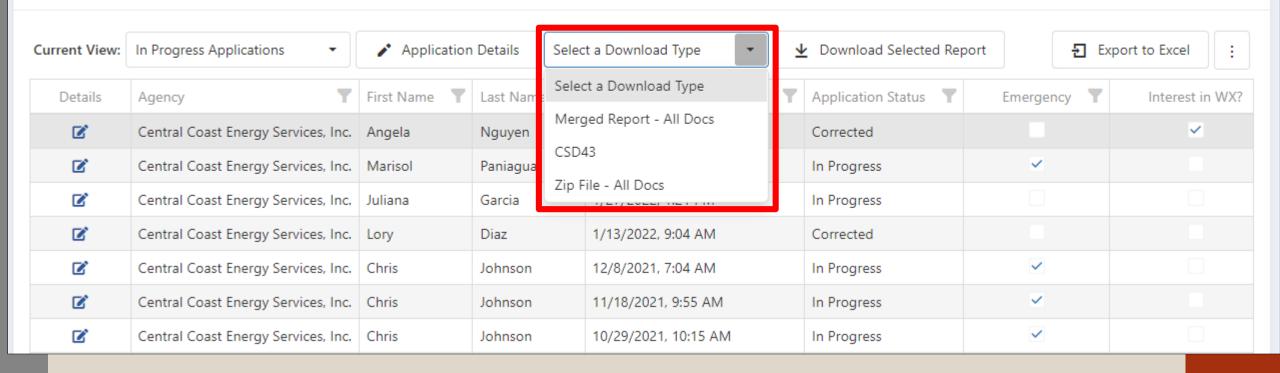
Agency Side – Step 2

- Download and view customer's submitted documents

Application Admin

| Current View: | In Progress Applications ▼ | ✏ Application Details | Select a Download Type ▼ | ⬇ Download Selected Report | ⇥ Export to Excel ⋮ |

Select a Download Type

Merged Report - All Docs

CSD43

Zip File - All Docs

Details	Agency ▼	First Name ▼	Last Name ▼		Application Status ▼	Emergency ▼	Interest in WX?
☑	Central Coast Energy Services, Inc.	Angela	Nguyen		Corrected	☐	☑
☑	Central Coast Energy Services, Inc.	Marisol	Paniagua		In Progress	☑	☐
☑	Central Coast Energy Services, Inc.	Juliana	Garcia		In Progress	☐	☐
☑	Central Coast Energy Services, Inc.	Lory	Diaz	1/13/2022, 9:04 AM	Corrected	☐	☐
☑	Central Coast Energy Services, Inc.	Chris	Johnson	12/8/2021, 7:04 AM	In Progress	☑	☐
☑	Central Coast Energy Services, Inc.	Chris	Johnson	11/18/2021, 9:55 AM	In Progress	☑	☐
☑	Central Coast Energy Services, Inc.	Chris	Johnson	10/29/2021, 10:15 AM	In Progress	☑	☐

File Download Options

1. ## <u>Merged Report – All Docs</u>

   - 1 File in PDF format
   - Includes:
     - CSD 43
     - All of customer's uploaded documents

File Download Options

2. **CSD 43**

- 1 File in PDF format
- CSD 43 with data filled in from online application

Department of Community Services and Development			Official Use Only:	
Energy Intake Form			Priority Points	
CSD 43 (10/2022)			A.C.C.	
Agency: **Central Coast Energy Services, Inc.**	Intake Initials:	Intake Date: **02/27/2024**	Eligibility Cert Date	

First Name		Middle Initial	Last Name	Date of Birth
▮▮▮▮▮			▮▮▮▮▮	MM/DD/YY ▮▮▮▮

SERVICE ADDRESS – Address where applicant lives (this cannot be a P.O. Box)

Service Address	Unit Number
▮▮▮▮▮	

Service City	Service County	Service State	Service Zip Code
San Francisco	San Francisco	CA	94112

	Yes	No
Have you lived at this residence during each of the past 12 months?.................	☑ Yes	☐ No
Is your service address the same as mailing address?................................	☑ Yes	☐ No
Do you own or rent your home?...	☐ Rent	☑ Own

Mailing Address	Unit Number
▮▮▮▮▮	

Mailing City	Mailing County	Mailing State	Mailing Zip Code
San Francisco	San Francisco	CA	94112

Social Security Number (SSN): ▮▮▮▮	Telephone Number: ▮▮▮▮	☐ Message Only?

Email Address: ▮▮▮▮▮

PEOPLE LIVING IN HOUSEHOLD		INCOME	
Enter the total number of people in the household, including yourself	**1**	Enter the total number of people who receive income	**1**

Demographics - Enter the number of people who are:		Enter total gross monthly income for all people living in the household:	
Ages 0 - 2 Years	0	TANF / CalWorks	$0.00
Ages 3 - 5 Years	0	SSI / SSP	$553.94
Ages 6 - 18 Years	0	SSA / SSDI	$649.00
Ages 19 - 59	0	Paycheck(s)	$0.00
Ages 60 and Older	1	Interest	$0.00
Disabled	0	Pension	$0.00
Native American	0	Other	$0.00
Seasonal or Migrant Farmworker	0	**Total Income**	$1202.94

HOUSEHOLD MEMBERS

ENTER THE INFORMATION BELOW FOR ALL HOUSEHOLD MEMBERS.
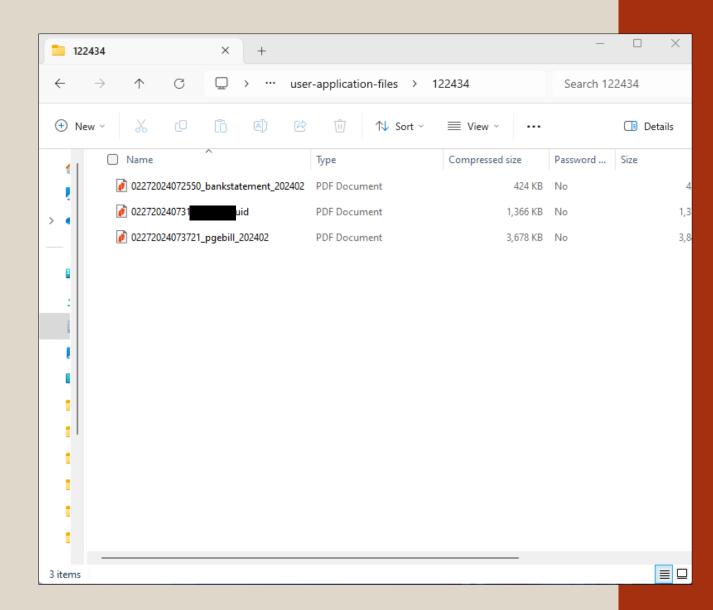
If you have more than 7 people in your household, please list the information on a separate piece of paper.

File Download Options

3. <u>Zip File – All Docs</u>
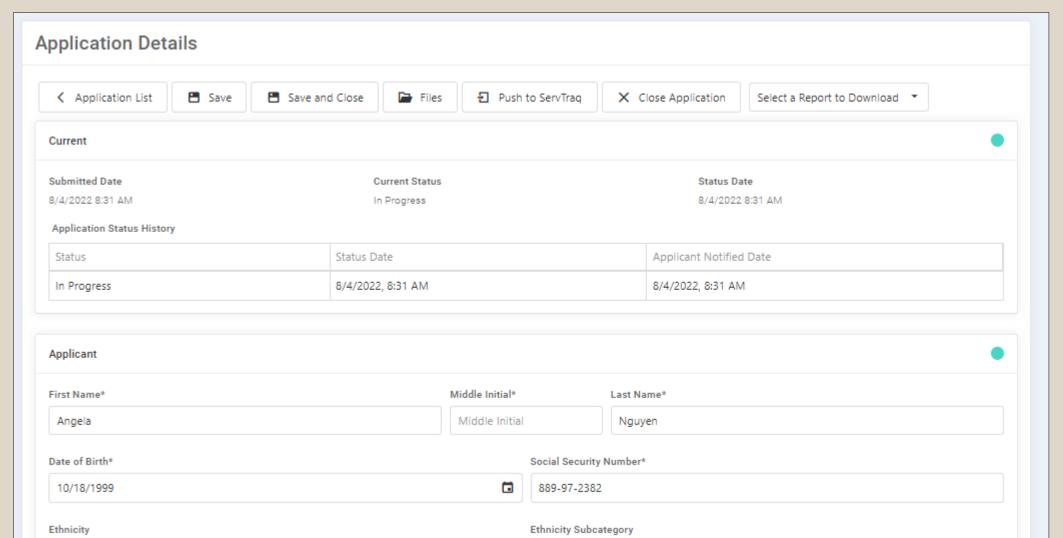
- 1 Folder with multiple files
- Individual customer documents in PDF format

Agency Side – Step 3
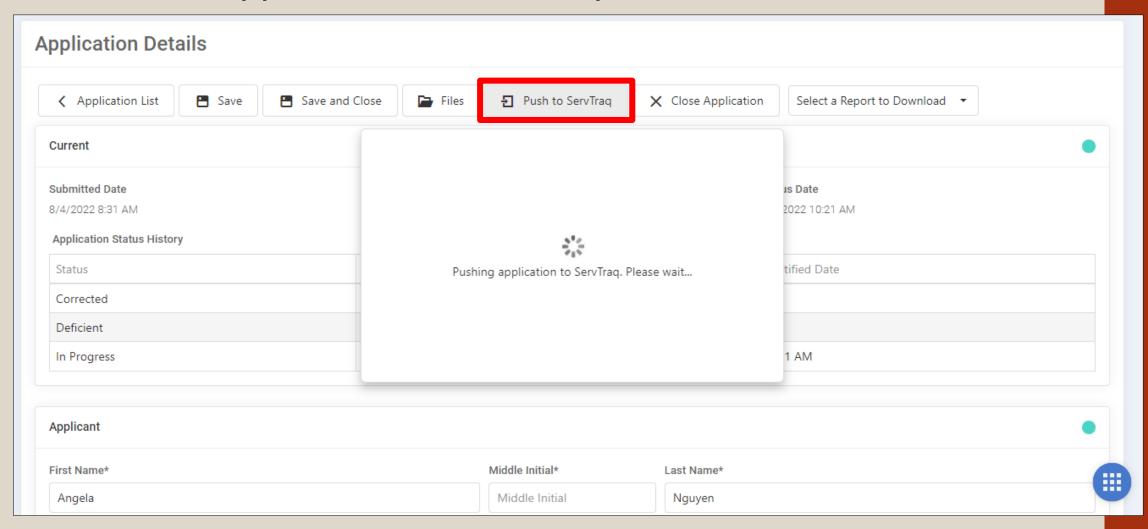
- Review submitted info and ensure info matches documents

Application Details

< Application List | 💾 Save | 💾 Save and Close | 📂 Files | ↪ Push to ServTraq | ✕ Close Application | Select a Report to Download ▼

Current ●

Submitted Date	Current Status	Status Date
8/4/2022 8:31 AM	In Progress	8/4/2022 8:31 AM

Application Status History

Status	Status Date	Applicant Notified Date
In Progress	8/4/2022, 8:31 AM	8/4/2022, 8:31 AM

Applicant ●

First Name*	Middle Initial*	Last Name*
Angela	Middle Initial	Nguyen

Date of Birth*	Social Security Number*
10/18/1999 📅	889-97-2382

Ethnicity   Ethnicity Subcategory

Agency Side – Step 4

- Transfer application to ServTraq

Agency Side – Step 5 (cont.)
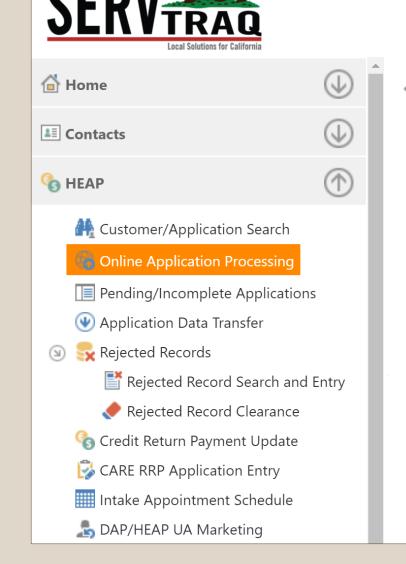
- New application ID will generate

Agency Side – Step 6

- Log in to ServTraq

- HEAP →
Online Application Processing
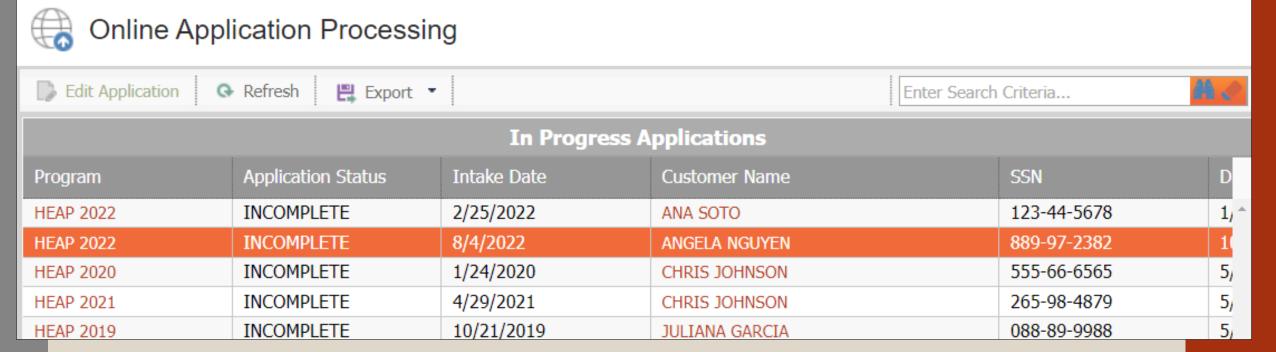
Agency Side – Step 6 (cont.)

- All applications "pushed" from online portal will appear in the **Online Application Processing** section

Agency Side – Step 7

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
- Notes
- Commitments
- Recertifications
- Files
- CORE Status History
- Monitoring Contacts
- Audit/Change History

Edit Application
SARAH CUSTOMER, ApplicationID - 119362

Program/Payment/Intake

Customer: SARAH CUSTOMER   ☐ Phone duplicate in PY?

Program: 2020 | HEAP 2020
Program Year*   Program*

Status: INCOMPLETE
- DENIED
- INCOMPLETE
- ELIGIBLE
- PENDING

Payment: $0.00 | $0.00
Supp. Payment*   Total Payment*

Utility Paid: PACIFIC GAS & ELECTRIC COMPANY - 15161412131

Priority Points: 0   ⓘ

Intake: ONLINE | 1/24/2020 | 1/24/2020
Intake Location   Intake Date*   Certification Date*

Language*: ENGLISH

Managing Deficient Applications

(Agency Side)

Agency Side – Step 1

- Open the Application

Application Admin

Current View: | All Applications | ▼ | 🖉 Application Details | Select a Download Type | ▼ |

Details	Agency	▼	First Name	▼	Last Name	▼	Application Submitted Date	▼
🖉	Central Coast Energy Services, Inc.	Angela	Nguyen	

Agency Side – Step 2

- Navigate to the Customer's "**Files**" section

Agency Side – Step 3

- Click "**Add Missing Document**"

Application Files - Supporting and Missing Documents

Supporting Documents

| | ⬆ Upload New File | ⬇ Download File | 🗑 Delete File Upload |

| ‹ Application Details | ⬆ Upload New File | ⬇ Download File | 🗑 Delete File Upload |

File Name	Missing Document Reference	Required Document Reference	
questionnairev1.pdf		Quesitonnaire	...
birth certificate.pdf		Applicant Citizenship or Non-Citizen Eligibility	...
income.pdf		Income Documents for Jeb Yondu	...
bill.pdf		Electric Bill	...
electric-csd081.pdf		Electric Bill CSD 081 Form	...
id.pdf		Photo Id	...

Missing Documents

+ Add Missing Document	✎ Edit Missing Document	🗑 Delete Missing Document

Missing Document	Note	Document Url	Completed	Completed Date	Entry Date	Entered By

There are no missing document requests for this application

Agency Side – Step 4

Add Missing Document

Name/Type of missing document → **Missing Document**

Explanation of missing document → **Description**

Public URL (if applicable) → **Download Link**

Submit

Agency Side – Step 4 (cont.)

Application Files - Supporting and Missing Documents

✓ **Success!**
Missing Document saved successfully ✕

Supporting Documents ●

[← Application Details] [↑ Upload New File] [↓ Download File] [🗑 Delete File Upload]

File Name	Missing Document Reference	Required Document Reference	Created Date
questionnairev1.pdf		Quesitonnaire	8/4/2022, 8:17 AM
birth certificate.pdf		Applicant Citizenship or Non-Citizen Eligibility	8/4/2022, 8:27 AM
income.pdf		Income Documents for Jeb Yondu	8/4/2022, 8:28 AM
bill.pdf		Electric Bill	8/4/2022, 8:29 AM
electric-csd081.pdf		Electric Bill CSD 081 Form	8/4/2022, 8:29 AM
id.pdf		Photo Id	8/4/2022, 8:30 AM

Missing Documents ●

[+ Add Missing Document] [✏ Edit Missing Document] [🗑 Delete Missing Document]

Missing Document	Note	Document Url	Completed	Completed Date	Entry Date	Entered By
Income Statements	Please upload paystubs for the last 30 days (7/4/22 to 8/4/22)		☐		8/4/2022, 9:54 AM	ANGELA NGUYEN

Deficient Application List

- Adding a request for a Missing Document will move the application to the **Deficient Application** list

What the customer sees...

Customer with Deficient App

- Customers with deficient applications will receive an email notification **AND** a pop up warning message on account page
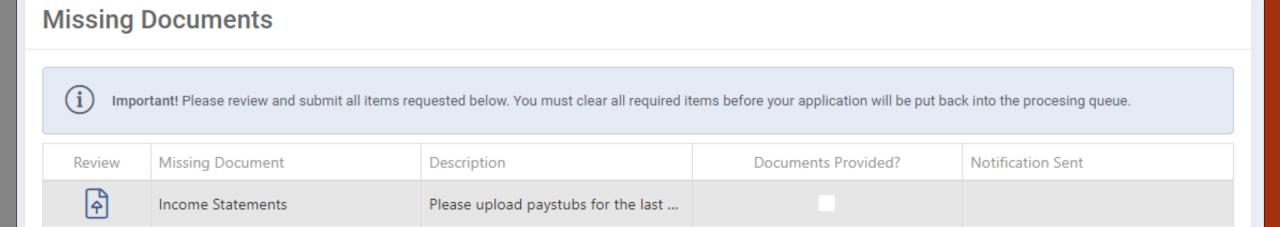
Customer with Deficient App (cont.)

- Display list of missing document(s)
- Upload documents right on the page

Missing Documents

ℹ️ **Important!** Please review and submit all items requested below. You must clear all required items before your application will be put back into the procesing queue.

Review	Missing Document	Description	Documents Provided?	Notification Sent
📄⬆️	Income Statements	Please upload paystubs for the last ...	☐	

5 8 15 30   Page 1 of 1 (1 items) ‹ 1 ›

How the Online Application System Works with ServTraq

Online Application Statuses

Automated from Application Portal	Manual Change from Application Portal	Automated from ServTraq
In Progress	Closed	Eligible
Deficient		Transferred
Corrected		Denied

ServTraq Contact Actions

1. ***HEAP Application Received***
   - New online customer → Customer Record created
   - Returning customer → Contact Action added to Customer Record
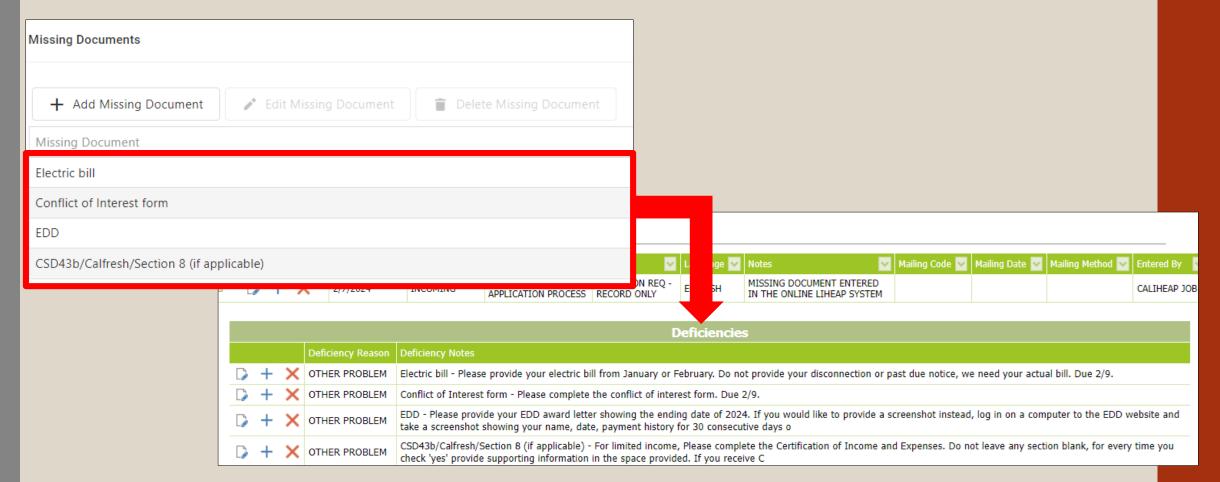
2. ***Online Deficient Application***
   - Each requested document will be added as the Deficiency Reason(s)

ServTraq Contact Actions
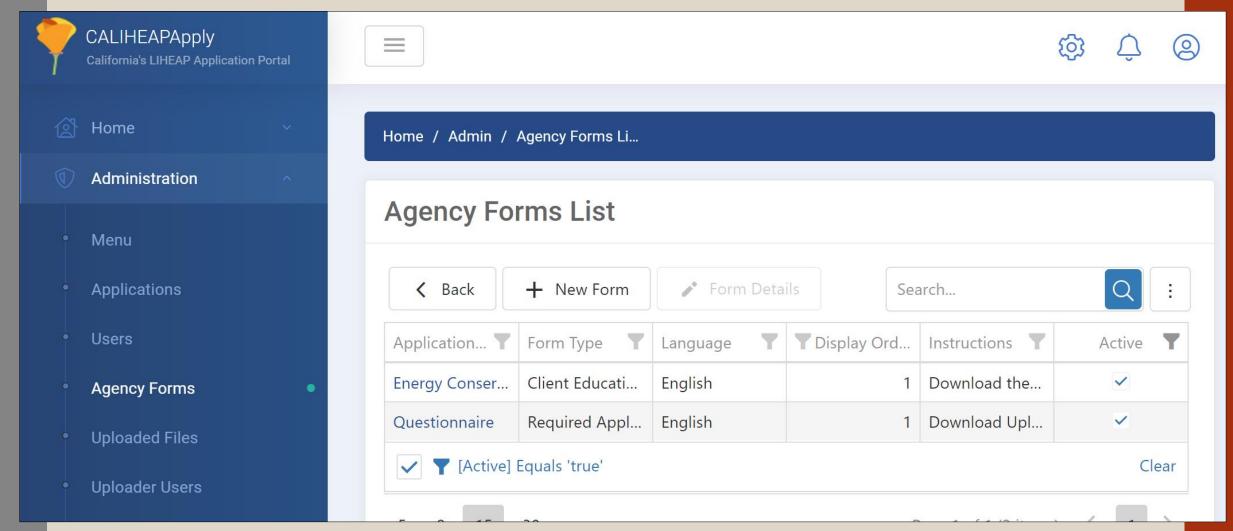
- Each "Missing Document" added to an online application generates a Deficiency Reason in ServTraq

Agency Administration Features
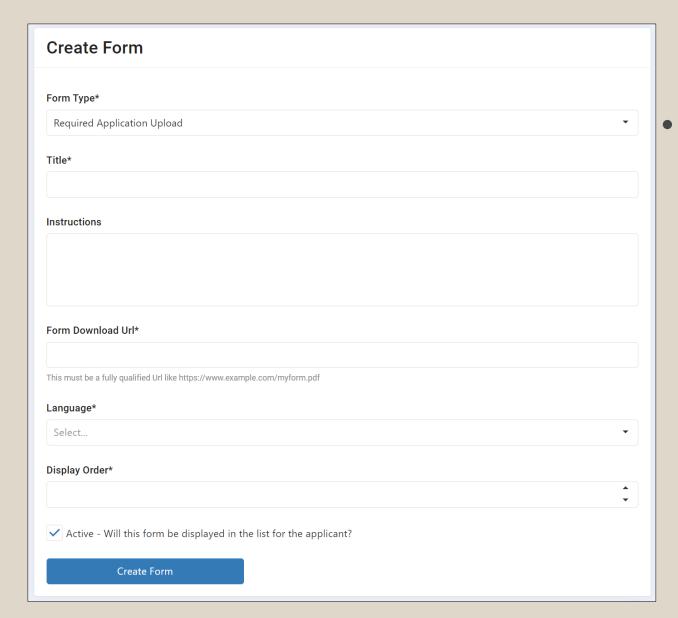
Customer Forms and Documents

- Ability to add required application documents or client education documents

Customer Forms and Documents

Create Form

Form Type*

[Required Application Upload   ▾]

Title*

[   ]

Instructions

[   ]
[   ]
[   ]

Form Download Url*

[   ]

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

Language*

[Select...   ▾]

Display Order*

[⬍]

☑ Active - Will this form be displayed in the list for the applicant?

[Create Form]
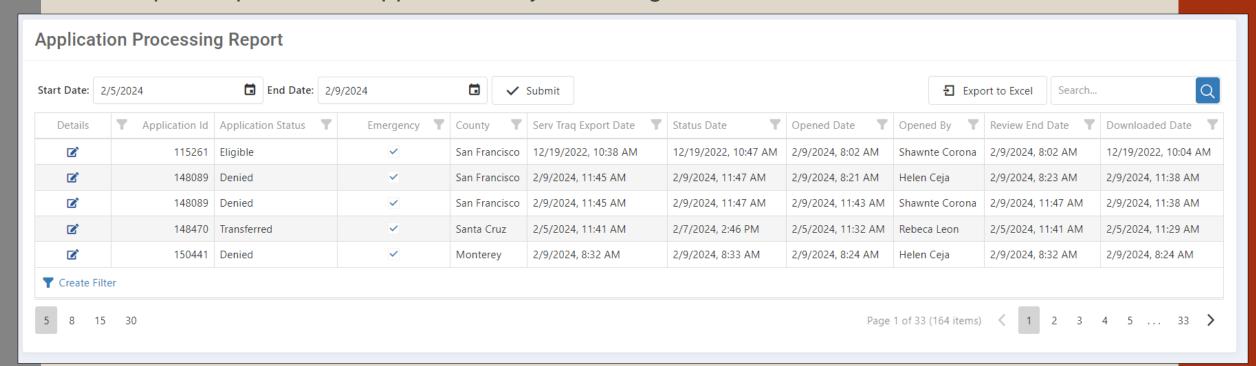
- Add a form for your customers here
  - Required Application Upload
  - Required Fillable Form
  - Client Education

Application Processing Report

- Report of processed applications by date range

Application Processing Report

Start Date: 2/5/2024   End Date: 2/9/2024   ✓ Submit   ⤓ Export to Excel   Search...   🔍

Details		Application Id	Application Status		Emergency		County	Serv Traq Export Date	Status Date	Opened Date	Opened By	Review End Date	Downloaded Date
✎		115261	Eligible		✓		San Francisco	12/19/2022, 10:38 AM	12/19/2022, 10:47 AM	2/9/2024, 8:02 AM	Shawnte Corona	2/9/2024, 8:02 AM	12/19/2022, 10:04 AM
✎		148089	Denied		✓		San Francisco	2/9/2024, 11:45 AM	2/9/2024, 11:47 AM	2/9/2024, 8:21 AM	Helen Ceja	2/9/2024, 8:23 AM	2/9/2024, 11:38 AM
✎		148089	Denied		✓		San Francisco	2/9/2024, 11:45 AM	2/9/2024, 11:47 AM	2/9/2024, 11:43 AM	Shawnte Corona	2/9/2024, 11:47 AM	2/9/2024, 11:38 AM
✎		148470	Transferred		✓		Santa Cruz	2/5/2024, 11:41 AM	2/7/2024, 2:46 PM	2/5/2024, 11:32 AM	Rebeca Leon	2/5/2024, 11:41 AM	2/5/2024, 11:29 AM
✎		150441	Denied		✓		Monterey	2/9/2024, 8:32 AM	2/9/2024, 8:33 AM	2/9/2024, 8:24 AM	Helen Ceja	2/9/2024, 8:32 AM	2/9/2024, 8:24 AM

▼ Create Filter

5 8 15 30   Page 1 of 33 (164 items) ‹ 1 2 3 4 5 . . . 33 ›

- Includes:
  - Employee names
  - When application was opened
  - When customer documents are downloaded
  - Last day reviewed
  - When app was pushed to ServTraq

Frequently Asked Questions

Frequently Asked Questions

1. **How is the system set up to prevent deficient applications?**

- Home page includes list of required documents
- Large notice on Document Upload section of application
- Document Upload section separates the upload of each individual document
- Application cannot be submitted if document requirement upload is not satisfied

Frequently Asked Questions

Important! Complete All Required Document Uploads

You must supply documentation for all of the following required documents. Appropriate documentation can be found by clicking the info circle icon in each required document detail. You will not be able to proceed to the next step until you have supplied documents for every required document category. One or more of these documents may require you to download the form, fill it out, and then upload it. You may need to get someone else to sign it if applicable. Not providing complete documentation will result in either a delay or a denial of your application. Read the description of what is required carefully and supply the documents asked for to streamline the application process.

If you prefer to scan your documents from paper you can click the Scan These Documents button for each requirement and provide documentation using a TWAIN-enabled local scanner.

Electric Bill Shut Off/Disconnection Notice
Status: No Documents Provided
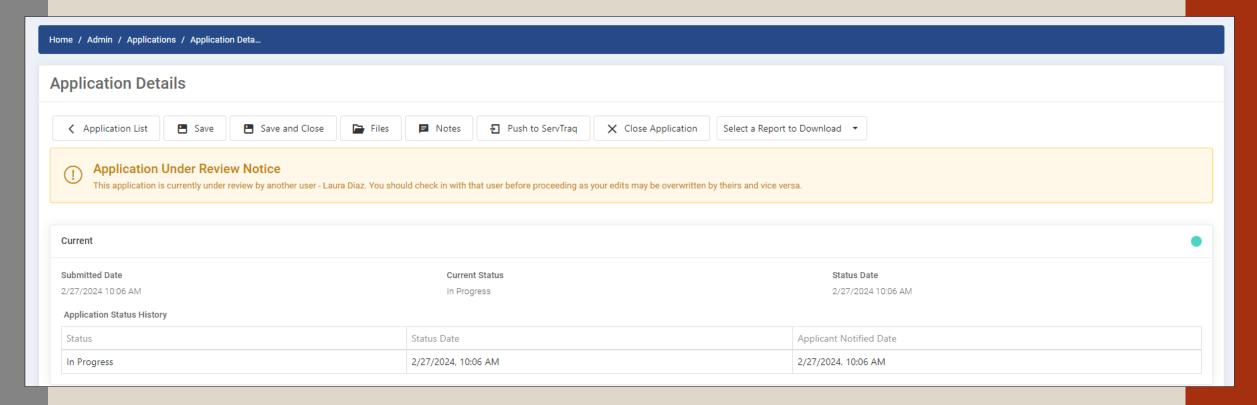
Specifics of Requirement

Please provide your shut off/disconnection notice for Pacific Gas & Electric Company; Account Number 2123124.

Upload Documentati··· | Scan These Documents

Electric Bill
Status: No Documents Provided

Specifics of Requirement

Please provide your complete most recent electric bill - complete bill, all pages - for utility - Pacific Gas & Electric Company; Account Number - 2123124. If your natural gas bill is the same as your electric bill you must also provide the pages showing your natural gas usage.

Upload Documentati··· | Scan These Documents

Photo Id
Status: No Documents Provided

Specifics of Requirement

Please upload a picture or scan of your photo id

Upload Documentati··· | Scan These Documents

Wood/Propane/Fuel Oil Bill
Status: No Documents Provided

Specifics of Requirement

Please provide your complete most recent WPO bill for Fuel Oil Non-Regulated Utility; Account Number 1

Upload Documentati··· | Scan These Documents

Frequently Asked Questions

2. We still receive so many deficient applications. How can we prevent this?

We don't know. If you find a solution, please let us know.

Frequently Asked Questions

3. **How can my team process applications without duplicating efforts?**

- What is currently working for agencies:
  - Assign applications by:
    - City
    - County (if applicable)
    - Priority point thresholds
    - Shut-Off Notice
    - Interested in WX
  - Measures in place to prevent duplicative work

Prevent Duplication of Work

A warning notice will appear upon opening an application that is already under review

Frequently Asked Questions

4. Why are returning customers with a different phone number creating a new Customer Record in ServTraq?

Too many Customer Records were being updated with incorrect or fake phone numbers.

Frequently Asked Questions

5. Why does the priority points of an application change when I push it to ServTraq?

Priority points on the online application system are an estimation. Once the application is in ServTraq, the priority points are more accurate because a program and subprogram gets assigned.

Frequently Asked Questions

6. Our customers are not tech-savvy, but we want to utilize the system. How can we get them to use the online system?

- What has worked for agencies:
  - Set up computers in the lobby and assign a staff member to assist
  - Encourage customers that call in for assistance to submit an online application and walk them through the website

Frequently Asked Questions

7. Our agency works with county caseworkers/local groups/community organizations that help bring in customer applications. Can they use the online system?

Yes! Partner agencies can be granted special permissions to upload applications on behalf of applicants.

Frequently Asked Questions

8. We anticipate very few of our customers submitting online applications because of X, Y, and Z. Are there additional benefits of the site?

Possibly. You can utilize it specifically for partner groups and agencies. If a person or group in the community assists your customers with completing paper applications, they try to use the website instead.

Q & A

Live Demo

Thank you!

support@caliheapapply.com

support@servtraq.com

February 29, 2024