

# CEAP Client File Checklist:

# CEAP Services



## Intake:

- Application, signed and dated
- Income determination
  - Income Calculator w/pay stubs or DIS

## Preassessment:

- Self-Sufficiency Questionnaire
- Self-Sufficiency Outcome Matrix

## Case Notes:

- With sufficient information to document that program service activity has occurred

## Correspondence:

- Notice of Denial and Appeal Rights (if applicable)
- Referral service providers

## Utility Bills

- Copy of Client's current Utility Bill
- Consumption Disclosure Release Form
- Twelve Month Billing History (all fuel types):
  - If 12 month billing history is not available, an approved Alternative Billing Method (NOTE: not applicable for Crisis Component only)

## Additional Documentation:

- Benefit level determination
- Priority Rating Sheet
- Energy Saving Tips provided to client
- Proof of Payments Made

## Household Status

- Household Status Verification Form for All Household Members
- SAVE Printout (if applicable)

## HVAC Repair Invoices (if applicable)

- Materials Invoice
- Labor Invoice