**HEAP & PIPP PLUS CLIENT REQUIREMENT FORM**

**IF YOU ARE LATE, YOU WILL HAVE TO RESCHEDULE**

**FAILURE** **TO HAVE ALL NECESSARY DOCUMENTS WILL RESULT IN YOU HAVING TO RESCHEDULE**

Now you can apply online for the Ohio Energy Assistance Programs— Visit [www.energyhelp.ohio.gov](http://www.energyhelp.ohio.gov)

You can now schedule an appointment online: https://app.capappointments.com/ or call 1-740-996-9061

To process your application for HEAP, E-HEAP and/or PIPP+ assistance, you must have proof of the following information at the time of application. If someone who is not a household member is coming in for you: you must include Power Of Attorney papers, a **NOTARIZED** signed & dated permission note naming the person, must be a legal guardian and/or a designated Representative Payee as determined by the Social Security Administration—proof of this must be provided.

**SOCIAL SECURITY NUMBERS (LEGAL)**: You must bring in legal **legible** proof of documentation with your social security number on it (Examples: Social Security Cards, Income tax return, Social Security print-out, medical record, school documents, etc.). If any household member is not a US citizen, you must provide legal proof of status. (\*Must have **originals**, copies will **NOT** be accepted\*)

**PROOF OF CITIZENSHIP:** You must bring in proof of citizenship for **ALL** members of your household.

(Example: Social Security Cards, Birth Certificate, Hospital Birth Records, Baptismal Records, Indian Census Record, Military Service Record, U.S. Passport, Verified Citizenship for OWF Program, Voter Registration Cards)

**\*If you do not have an original, legible social security card for each household member you must then provide legal proof of social security numbers along with proof of citizenship. \*Please Note: Copies will NOT be accepted.\***

**DRIVERS LICENSE/IDENTIFICATION CARD:**  You must bring in a legible, current driver’s license or identification card for each household member 18 years or older. These cannot be expired.

**INCOME**: Proof of all income for every household member 18 or older **from the date of your appointment 30 days back.**

**PLEASE NOTE:**

* If your 30 day income is not reflective of the previous 12 months of income you will be required to bring 12 months of income documentation from that date of your appointment.
* If you are under the 30% of the Federal Poverty Guidelines you will be required to provide additional information, please call 740-282-0971 EXT: 200 to go over requirements.

You will be required to bring in proof of the following:

 **Fixed Countable Income**

* **Social Security/SSI/SSDI**
* **Pensions**
* **Alimony**
* **Widow/Widowers Benefit**
* **Black Lung Pension**
* Award/Benefit letter, Copy of Check or bank statement, or Payment printout/statement from issuing agency.

**Earned Countable Income**

* **Wages**
* **Active Military Pay**
	+ All pay stubs received 30 days from the date of your application, that includes gross and year-to-date amounts received
	+ Completed and signed Employment Verification Form (this can be obtained at our Local Agency)

**Other Earned Countable Income**

* **Seasonal Employment (Includes construction workers, teachers, landscapers, bus drivers etc.)**
* All pay stubs indicating amount received within the previous 12 months from the date of the application
* Seasonal income will be determined by dividing the 12-month amount by 12 to arrive at a monthly average

* **Self-employment**
	+ - If you file as Self-Employed on your taxes you must bring in the most recent full IRS Form 1040 that was accepted by the IRS, which includes the Schedule C and Schedule 1.
		- If you currently do Odd Jobs you will be required to obtain an IRS Tax Transcript of Non-Filing.
		- If you do not file as Self-Employed/Odd Jobs on your taxes you will need to bring in proof of cancelled checks, quick books, log, etc. of your income for the most recent 12 months back from date of your appointment. If you have deductions you will need to bring in proof of receipts for the most recent 12 months.

**Supplemental Countable Income**

* **Unemployment**
* All checks received for 30 Days from date of application
* ODJFS documents/Eligibility letter with amounts and dates
* **Utility Assistance**
* Housing Authority Documentation
* **PLEASE NOTE: Lease and/or Rental Agreements are NO longer acceptable documentation for utility checks (vouchers)**
* **Workers’ Compensation**
* Award letter from issuing agency
* Copy of checks for 30-Days or Bank Statements
* **OWF/TANF/ADC**
* Award/Benefit Letter
* Payment Printout/Statement from issuing agency
* Copy of Check or Bank statement showing deposit
* **Employment Disability Payouts (i.e. Short-Term or Long-Term Disability Payouts)**
	+ Award Letter
	+ Pay Stubs
* **Strike Benefit**
	+ Pay Stubs

**Other Countable Income**

* **Cash withdraws from: IRA, Annuities, Other Investments**
* **Lump sum payout from: Estate & Trust settlements, Divorce settlements, Insurance payout, Lottery winnings**
* **Interest Income**
* **Other**
* Statement from Financial Institution
* Copy of Check or Bank Statement showing deposit
* Most Recent IRS From 1099

**No Income**

* You must bring a notarized statement from any individual who is providing financial assistance within the last 30 days from your appointment date showing the date, their name, address, phone number & signature. This needs to be detailed showing every cash amount given to you directly or paid directly towards your monthly household & personal expenses. If the bills are being paid directly to the creditor, proof of cancelled checks and/or receipts are required for the past 30 days from appointment date.
* Most recent IRS Tax Return Transcript or IRS Verification of Non-Filing Letter will be required if you have been zero income for 1 or more years.
* In addition, you must bring in your updated Job & Family Service **Issuance History**- this must be dated within 30 days of your appointment, along with this you will need the most recent, up to date, **Notice of Action** from Job & Family Services (all pages must be included, must have all Notice of Action’s for each benefit received, example: SNAP, Medicaid, ETC)
* You will be required to provide an IRS Tax Return Transcript or an IRS Verification of Non-Filing Letter if (This includes but **IS NOT limited too**) : you are paying any/all bills with money in a savings account/a lump sum of money received/Stimulus money/Tax refund money/etc. If you are unsure if your circumstance will apply, please contact our local agency and speak with someone directly.

**\*Please Note:** If you are an unmarried couple and/or if someone in your household 18 or older does not have income, you must bring in your current Job & Family Service Issuance History & most recent Notice of Action for each benefit received.

* If a household member is 18 or older and attending high school or college, you must bring in proof of school enrollment.
* If the total household has claimed zero income for 1 or more years you **WILL** be required to bring in their most recent IRS Tax Return Transcript or IRS Verification of Non-Filing Letter for each person 18 years or older.

**Please Note: If your household has zero income, please contact our local agency (740-282-0971 x200), for a detailed list of documentation that will be required to complete a case.**

**DEDUCTIONS:** 30 days back- from the date of your appointment- proof of child support, medical, prescription, dental, eye or supplementary health insurance.

**Excluded Income**

* **Gifts –** Notarized Statement of Support from provider of gift indicating amount and frequency, along with showing provider name, address and phone number
* **Census Wages**—All paystubs received 30 days from the date of the application that include gross and/or year-to-date amounts received
* **Loans/Education Assistance –** Official notification on loan on institution letter head including loan amount and repayment terms from issuing financial institution
* **Child Support Received, Stipends for Foster Case, Adoption Assistance –** Award/Benefit Letter, Payment printout/statement from issuing agency, pay statement or copy of canceled check or bank statement

**PLEASE NOTE: Child Support must be updated to the date of your appointment**

* **SS/SSI and SSDI Overpayments**—Award/Benefit Letter (dated in same year as the application date)
* **Service Connected Disability, VA Compensation/Dependent Indemnity Compensation (DIC) –** Statement from issuing agency, Award Letter with Benefit amounts, bank statement (If income type is specified)
* **Work programs for people with disabilities/Workforce Investment Opportunity Act (WIOA) (Stipend provided for specific purposes other than Living Allowances)/Volunteers in Service to America Stipend (VISTA)/Work Allowances (work requirements to receive Ohio Works First (OWF) Assistance/Title V Wages (i.e. senior employment program)/Ohio Waiver Program (Medicaid benefit for caregiver) –** Award/Benefit Letter, or Payment Printout/statement from issuing agency
* **Income earned by dependent minor –** All paystubs received 30 days from date of application that includes gross and year-to-date amount received
* **Tax refunds/rebates –** Most recent IRS Form
* **Military allowances for subsistence –** Award/Benefit Letter, Payment Printout from issuing agency
* **Prevention retention and contingency ( i.e. emergency services, rental asst.), FEMA, Title III Disaster relief emergency assistance –** Award/Benefit Letter, or payment Printout/statement from issuing agency
* **Proceeds from reverse mortgage-** Payment Printout/statement from issuing agency
* **Fair market value of services in lieu of rent—**signed statement from landlord and/or Lease/Rental Agreement

**PLEASE NOTE- YOU WILL BE REQUIRED TO BRING IN PROOF OF ALL:**

1. Fixed Countable Income

2. Earned Countable Income

3. Other Earned Countable Income

4. Supplemental Countable Income

5. Other Countable Income

6. No Income

7. Excluded Income

**UTILITY BILLS/VENDOR SLIPS**: Bring in your most current gas & electric bills even if you are not wanting assistance for both. Utility bills must be either in your name or a household member 18 or older. If you are applying for new service or transfer of service, you must contact & make arrangements with the utility companies and bring in new account numbers. If oil, propane, coal or wood is your main source of heat, bring in a vendor slip (this is not mandatory but will be helpful). If you are a new customer for bulk fuel, you should contact a fuel supplier and ask to add you as a new customer.

**\*PLEASE NOTE: If any utility is included in your rent you will be required to provide your current, updated lease or a signed, notarized statement from your landlord to qualify for any service. This statement must be dated within thirty (30) days of your appointment and must include your landlords name, address, and phone number.**

**If any utility is in another individual’s name, you will be required to provide that utility bill to qualify for any service.**

**Additional Information:**

If you are applying for Summer Crisis Benefits: (July 1st – August 31st)

* Individuals Age 60 and Over
* Individuals with a Documented Medical Condition — this must be verified by a licensed physician, a registered nurse practitioner or a physician assistant (doctor office letterhead (current) or a completed & signed ODSA “Medical Eligibility Form” issued no more than 1 year prior to the date of appointment).
* If you are a PIPP Plus customer or have a PIPP default on your electric bill, you are NOT eligible to receive a monetary benefit towards your electric bill, however you may be eligible to receive an AC unit and/or fan.
* You may receive an AC and/or fan once every 4 years.

If you are applying for Winter Crisis Benefits: (November 1st – March 31st)

* Must be in threat of a disconnection notice or have been terminated
* Bulk Fuel tank must contain 25 percent or less of its fuel supply

**All scenarios cannot be included in the client requirement form.**

**Based on household circumstances, other documentation may be required to qualify for services.**

UPDATED: RG 11-4-2021

**Internal Revenue Service (IRS Transcript)**

The documents may be obtained in three (3) ways:

**By Phone:**

1-800-908-9946

(This method requires the customers to provide their Social Security Number, date of birth, street address, and zip code. Please allow 5 to 10 calendar days)

**In Writing:**

**Please Complete an IRS Form 4506-T**

**Tax Return Transcript**:

Internal Revenue Service

RAIVS Team

Stop 6705 S-2

Kansas City, MO 64999

or

FAX: 855-821-0094

**Verification of Non-Filing Letter:**

Internal Revenue Service

RAIVS Team

P.O. Box 9941

Mail Stop 6734

Ogden, Utah 84409

or

FAX: 855-298-1145

**ON-LINE:**

<http://www.irs.gov/Individuals/Get-Transcrip>t

(This method required the customer to create a user ID and password to access the IRS system and then provide their Social Security Number, date of birth, street address, and zip code to view and print their transcript immediately)