



## Office of the Ohio Consumers' Counsel

Your Residential Utility Consumer Advocate

# CONSUMERS' FACT SHEET

### Office of the Ohio Consumers' Counsel

65 East State Street  
7th Floor, Columbus, OH  
43215

E-MAIL:  
occ@occ.ohio.gov

WEBSITE:  
www.occ.ohio.gov

# ENERGY ASSISTANCE APPOINTMENT CHECKLIST

Consumers scheduling an energy assistance appointment at their local Community Action Agency (CAA) must bring the proper documentation to complete the application process. This fact sheet serves as a checklist to assist you with gathering the necessary documents.

Ohioans applying for the Home Energy Assistance Program (HEAP), Percentage of Income Payment Plan Plus (PIPP Plus), Winter Crisis Program (WCP), or Summer Crisis Program (SCP) **will need the following documents:**

- Proof of citizenship or legal residency for **all** household members. Check with the local CAA for accepted documents.
- Birth dates and Social Security cards for **all** household members. Legal documents showing the Social Security numbers may be accepted. Check with the local CAA.
- Photo ID of applicant; must be the household member with the utility bills in his or her name.
- Current electric and/or natural gas bill and/or disconnection notice if applicable. Contact the utility to obtain copies if necessary. If applying for new service, transferring service, or if service has been off for more than 14 days, contact the utility to get account numbers.
- Proof of income for the previous 30 days for all members of the household 18 years and older (see below). Proof of income for the past 12 months may be required.

#### Examples of income:

- ▶ Supplemental Security Income (SSI)

- ▶ Social Security Disability Insurance (SSDI)
- ▶ Social Security Administration (SSA)
- ▶ Pensions
- ▶ Widow/widower's benefits
- ▶ Alimony
- ▶ Wages or self-employment pay
- ▶ Active military pay
- ▶ Utility assistance
- ▶ Ohio Electronic Child Care (ECC)
- ▶ Unemployment
- ▶ Workers' compensation
- ▶ Ohio Works First

**Proof of income documents** may include, but are not limited to:

- ▶ Award/benefit letters
- ▶ Payment printout/statements from issuing agency
- ▶ Copy of check or bank statement showing deposit
- ▶ Pay stubs or statements
- ▶ IRS transcripts
- ▶ Financial institutions statements

If claiming **zero** income, you will need to complete and sign paperwork indicating how the household has been sustained and provide proof. Documents accepted as proof of zero income include, but are not limited to:

- ▶ Statements from friends/family who have been helping with bills or expenses. (Must be signed, dated, and include contact information, as well as the amount, form of payment, and how often the assistance has been provided.)
- ▶ IRS tax transcripts, which can be obtained by contacting the IRS.

**ENERGY ASSISTANCE  
APPOINTMENT  
CHECKLIST**

**CONSUMERS'  
FACT  
SHEET**

The Office of the Ohio Consumers' Counsel (OCC), the residential utility consumer advocate, represents the interests of 4.5 million households in proceedings before state and federal regulators and in the courts.

The state agency also educates consumers about electric, natural gas, telephone and water issues.

For more information, please visit the OCC website at [www.occ.ohio.gov](http://www.occ.ohio.gov).



*The Office of the Ohio Consumers' Counsel is an equal opportunity employer and provider of services.*

**Additional documentation may be required:**

- If you (or any household member 18 years or older) attend college, current tuition/ financial aid information may be required.
- Any household with a member who is permanently and totally disabled must provide proof of the disability, such as a doctor's statement or proof of income received because of the disability (SSDI, SSI, VA Pension, VA Disability, etc.).
- If you rent or lease your residence you may be asked to provide:
  - ▶ A copy of your current lease and landlord's name, address and phone number.
  - ▶ For a month-to-month lease or verbal agreement you may be required to provide a notarized statement of agreement from the landlord that includes the landlord's name, address and phone number.
  - ▶ For HUD/government-assisted housing, you may be required to provide a Tenant Eligibility and Rent Procedures Form or Housing Vouching Notice of Rent Change Form. Other documentation may be accepted by your local CAA.
- Bulk fuel users applying for the Winter Crisis Program must certify in writing that they have less than a 10-day supply or less than 25% of a supply of bulk fuel.
- If a non-household member will be representing you at your appointment, you must provide a notarized statement or Power of Attorney giving permission to process your application. That non-household member must have ID to accompany the documentation. Home visits may be available due to age or disabilities.

This checklist serves as a guide for energy assistance appointments. Your local CAA may require different documentation, so verify what you need when scheduling the appointment.

For questions, or for more information, contact your local CAA. To locate your local CAA, visit [www.energyhelp.ohio.gov](http://www.energyhelp.ohio.gov) or contact the Ohio Development Services Agency (ODSA) at 1-800-282-0880.