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QUALIFICATION METHODS & INCOME CALCULATION

To apply for the Energy Savings Assistance Program, you must provide accurate documentation to determine eligibility. Here's what you need to know about the required documents:

HOME OWNERSHIP DOCUMENTATION

Ensuring the legal owner signs the Property Owner Authorization is essential. Here are acceptable documents for verifying home ownership:

- Trust documents (verified through County records)
- Deeds
- Mortgage Statements or Loan Documents
- Homeowner's insurance
- Data Quick System
- Property tax records or bills

Ensure all provided documents meet Energy Savings Assistance Program criteria for home ownership verification.

INCOME QUALIFICATION GUIDELINES

Refer to the Energy Savings Assistance Program Income Guidelines table to determine eligibility based on household size and maximum gross income. Effective from June 1, 2023, to May 31, 2024, these guidelines determine if you qualify for the program.



CATEGORICAL ENROLLMENTS

If you qualify under specific categories, ensure your documentation includes:

- Name
- Address
- Date
- Program Name
- Additional specific information as required by each program

Resolve any address discrepancies by providing correct information along with your signature and date.

BUREAU OF INDIAN AFFAIRS GENERAL ASSISTANCE

- **Document Required:**
 - Award Letter or Notice of Action (indicating TANF)
 - Screen print from the issuing agency showing current participation
- **Maximum Age of Document:** 12 months

LOW-INCOME HOME ENERGY ASSISTANCE PROGRAM (LIHEAP)

- **Document Required:**
 - Proof of LIHEAP payment to utility
 - LIHEAP Voucher with approved stamp or signature (from CAPOC, MAAC, or CUI)
- **Maximum Age of Document:** 12 months



MEDICAID/MEDI-CAL FOR FAMILIES A&B

- **Document Required:**
 - Award Letter (Benefit Verification Letter) or Notice of Action
 - Screen print from the issuing agency reflecting current participation
 - Screen print from the CA.gov website reflecting current participation
 - Fax from Case Worker/Assessor reflecting eligibility information
 - Benefits ID Card (BIC) with a valid issue date within the past 12 months of enrollment date
 - Monthly billing statement detailing household members and monthly premium
- **Maximum Age of Document:** 12 months

NATIONAL SCHOOL LUNCH PROGRAM (NSLP)

- **Document Required:**
 - School Award Letter (dated within the current school year). The student's name must be stated on the letter; otherwise, a linking document is required (e.g., Report Cards, Student ID Card, etc.)
- **Maximum Age of Document:** 12 months

TEMPORARY ASSISTANCE FOR NEEDY FAMILIES (TANF)/CALWORKS AND TRIBAL TANF

- **Document Required:**
 - Award Letter or Notice of Action



- Screen print from the issuing agency showing current participation
- Screen print from the CA.gov website showing current participation
- **Maximum Age of Document:** 6 months

CALFRESH/SUPPLEMENTAL NUTRITION ASSISTANCE PROGRAM (SNAP) (FOOD STAMPS)

- **Document Required:**
 - Award Letter or Notice of Action
- **Maximum Age of Document:** 6 months

HEAD START INCOME ELIGIBLE (TRIBAL ONLY)

- **Document Required:**
 - Approved Head Start application statement or Enrollment in Head Start
- **Maximum Age of Document:** 12 months

SUPPLEMENTAL SECURITY INCOME (SSI)

- **Document Required:**
 - Award Letter
 - Copy of bank statement showing direct deposits
 - Copy of bank statement from EBT account showing direct deposit of funds
- **Maximum Age of Document:** 12 months for Award Letter, 60 days for bank statements

WOMEN, INFANTS AND CHILDREN PROGRAM (WIC)

- **Document Required:**



- WIC Voucher (with current or future date listed)
- Print screen from WIC office representative (with WIC's logo)
- Letter of eligibility provided by the agency
- **Maximum Age of Document:** 60 days

STATEMENTS & AFFIDAVITS FOR DIFFERENT INCOME SOURCES

Ensure you provide the necessary supporting documentation for each type of income source:

WAGES, SALARIES & COMMISSIONS

- Copy of two consecutive payroll check stubs or Affidavit from the employer (for cash wages only)
- Document age: 60 days

CAPITAL OR OTHER GAINS

- Copy of 1099 form from prior year
- Document age: 12 months

DISABILITY BENEFITS & UNEMPLOYMENT BENEFITS

- Copy of check stubs or copy of bank statement from EBT account showing direct deposit of funds or Copy of recent Award Letter
- Document age: 60 days for Unemployment Benefits, 12 months for Disability Benefits

FOSTER CARE, VA BENEFITS & WORKER'S COMPENSATION

- Copy of recent Award letter or Notice of Action or Copy of check stubs



- Document age: 12 months for VA Benefits and Worker’s Compensation, 60 days for Foster Care

GAMBLING/LOTTERY WINNINGS

- Approval from Energy Savings Assistance Program management
- Document age: 12 months

GENERAL RELIEF/CASH PUBLIC ASSISTANCE (COUNTY)

- Copy of Award letter or Notice of Action or Copy of bank statement from EBT account showing direct deposit of funds
- Document age: 12 months for General Relief, 60 days for Cash Public Assistance

INTEREST & DIVIDENDS

- Copy of bank statement showing deposits or Copy of customer’s investment statement(s)
- Document age: 60 days for Interest, 12 months for Dividends

PROCEEDS FROM INSURANCE/LEGAL SETTLEMENTS

- Copy of settlement document
- Document age: 12 months

MONETARY GIFTS

- Customer statement for receipt of one-time monetary gift or Statement from person providing support for recurring monetary gifts
- Document age: 60 days



PENSION, 401K, AND IRA WITHDRAWALS OR DISTRIBUTIONS

- Copy of customer's check stubs or Copy of recent Award letter or Copy of form 1099R from prior year or Copy of bank statement showing direct deposit
- Document age: 60 days for check stubs, 12 months for Award letter and form 1099R

RENTAL INCOME

- Copy of rental receipts or Copy of rental agreement specifying rent amount AND statement from tenant
- Document age: 12 months for rental receipts, 60 days for rental agreement

SCHOOL GRANTS, SCHOLARSHIPS & OTHER STUDENT AID

- Copy of Award letter or Copy of cancelled check(s)
- Document age: 12 months

SELF-EMPLOYMENT EARNINGS

- Affidavit from customer or accountant
- Document age: 12 months

SSA - SOCIAL SECURITY ADMINISTRATION

- Copy of recent Award Letter or SSA 1099 or Copy of bank statement showing direct deposit or Copy of bank statement from EBT account showing direct deposit of funds
- Document age: 12 months for Award Letter and SSA 1099, 60 days for bank statements

UNION STRIKE FUNDS

- Copy of benefits payment stubs
- Document age: 12 months



ALIMONY & CHILD SUPPORT

- Copy of Check or Copy of bank statement showing deposit with customer statement or Copy of court document stating amount or Customer statement (if receiving cash)
- Document age: 12 months for Alimony and Child Support, 60 days for bank statements

OTHER MEANS OF SUPPORT

- Applicant must demonstrate other means of financial support (e.g., credit card loans, reverse mortgages, savings, subsidized housing, etc.)
- Document age: 30 days

