

Department of Community Services and Development
Low-Income Weatherization Program
Single-Family Energy Efficiency Program
Categorical Eligibility Requirements 2017

PROGRAM*	ACCEPTABLE DOCUMENTS	MAX AGE OF DOCUMENTS
Bureau of Indian Affairs General Assistance	<ul style="list-style-type: none"> • Award Letter or Notice of Action • Bank Statement with Direct Deposit Source (Gross Amount) • Screen Print from Issuing Agency • Un-Cashed Check(s) 	90 Days
Low-Income Home Energy Assistance Program (LIHEAP)	<ul style="list-style-type: none"> • CSD Form 43 • Proof of LIHEAP Payment to Utility 	12 Months
Medi-Cal	<ul style="list-style-type: none"> • 1095-B (01/01 to 06/30 Only) DHCS 68-0317191 • 3rd Party Medi-CAL Card (LA Care, IEHP, HealthNet, etc.) • Adoption Assistance or Foster Care Award Letter • Award Letter or Notice of Action • Benefits ID Card (Issued with 12 months) 	12 Months
Medi-Cal for Families	<ul style="list-style-type: none"> • Award Letter or Notice of Action • Current (<60days) Premium Statement (Not Past Due) 	12 Months
NSLP (National School Lunch Program)	<ul style="list-style-type: none"> • Award Letter or Notice of Action 	12 Months
SNAP (Federal Supplemental Nutritional Assistance Program) CALFRESH	<ul style="list-style-type: none"> • Award Letter or Notice of Action • Fax from Case Worker • Screen Print from Issuing Agency • Screen Print from Website 	6 Months
SSI (Supplemental Security Income)	<ul style="list-style-type: none"> • 1099 (01/01 to 06/30 only) • Award Letter or Notice of Action • Bank Statement with Direct Deposit Source (Gross Amount) • Fax from Case Worker • Screen Print from Issuing Agency • Un-Cashed Check(s) 	12 Months
TANF (Temporary Assistance for Needy Families) CALWORKS	<ul style="list-style-type: none"> • Award Letter or Notice of Action • Bank Statement with Direct Deposit Source (Gross Amount) • Screen Print from Issuing Agency • Un-Cashed Check(s) 	12 Months
Tribal Head Start	<ul style="list-style-type: none"> • Award Letter or Notice of Action 	12 Months
Tribal TANF	<ul style="list-style-type: none"> • Award Letter or Notice of Action • Bank Statement with Direct Deposit Source (Gross Amount) 	12 Months

	<ul style="list-style-type: none"> • Screen Print from Issuing Agency • Un-Cashed Check(s) 	
WIC (Women, Infants and Children)	<ul style="list-style-type: none"> • WIC Folder • WIC Voucher 	60 Days

*Adopted by CPUC in Decision 06-12-038 and modified in Decision 08-11-031 and 12-08-044 for the large investor-owned utilities' Low Income Energy Efficiency (LIEE) and California Alternate Rates for Energy (CARE) programs

Low-Income Weatherization Program Single-Family Energy Efficiency Program Income Documentation Requirements 2017				
Income Source	Countable		Documentation <i>(only one method is required)</i>	Max Age of Document
	Yes	No		
Wages, Salaries & Commissions	X		<ul style="list-style-type: none"> • Current copy of pay stub(s) covering 1 month of gross income before deductions • Letter from employer with company letterhead, address, phone number, the gross amount and current pay period • Cash Only Affidavit • Copy of Federal Income tax filings showing gross income and W2 or 1099 	30 days (current within 6 weeks) 12 months
Alimony Child Support- (Paying) <i>(child support payment can be deducted from gross income)</i>		X	<ul style="list-style-type: none"> • Copy of check • Copy of bank statement showing payment • Signed affidavit from the person receiving the support • Copy of most recent court document stating amount 	30 days (current within 6 weeks)
Alimony Child Support- (Receiving)	X		<ul style="list-style-type: none"> • Copy of check • Copy of bank statement showing deposit • Signed affidavit from the person providing the support • Copy of most recent court document stating amount 	30 days (current within 6 weeks)
Capital of Other Gains <i>(Only if self-employed or selling real-estate property on regular basis)</i>	X		<ul style="list-style-type: none"> • Federal income tax filing showing capital gains including all supporting documents 	12 months
Disability, Foster Care, VA benefits, Unemployment Worker's Compensation	X		<ul style="list-style-type: none"> • Current check stub(s) • Current printout • Current award letter • Bank statement • Foster care payments received - DO NOT count if child/adult are unable to live alone 	30 days (current within 6 weeks)
Gambling/Lottery Winnings	X		<ul style="list-style-type: none"> • Determined on a case-by-case basis • Seek feedback from CSD management 	N/A

<u>General Relief/Cash Public Assistance (County)</u>	X		<ul style="list-style-type: none"> • Current Award Letter of Notice of Action • Copy of current check • Current verification from worker with amount of payment and date • Food Stamp verification with current income amount listed • Current aid printout summary • Copy of bank statement showing direct deposit • Passport to Services printout summary 	12 Months 30 days (current within 6 weeks)
<u>Interest Dividends and Royalties</u>	X		<ul style="list-style-type: none"> • Copy of screen print of bank statement showing deposits/direct deposit • Copy of customer's investment statements • Current Federal Income tax return with all schedules including IRS Form 1099 	30 days (current within 6 weeks)
<u>Proceeds from Insurance/Legal Settlements</u> <i>(if regular payments from insurance or annuity)</i>	X		<ul style="list-style-type: none"> • Copy of settlement document 	No Maximum Age
<u>Monetary Gift</u> <i>(one-time payment)</i>		X	N/A	N/A
<u>Monetary Gift</u> <i>(reoccurring payments)</i>	X		<ul style="list-style-type: none"> • Copy of screen print of bank statement showing deposit • Affidavit from the gift giver 	30 days (current within 6 weeks)
<u>Pension 401K Payments and Withdrawals IRA-401-K Disbursements</u>	X		<ul style="list-style-type: none"> • Copy of most recent Award Letter • Copy of customer's check stubs • Copy of Form 1099R with tax return • Copy of screen print of bank statement showing direct deposit 	30 days (current within 6 weeks)
<u>Rental Income</u>	X		<ul style="list-style-type: none"> • Tax return form 1040 and Schedule E showing rental income and royalty income • Copy of rental receipts • Copy of rental agreement specifying rent amount • Affidavit from tenant specifying rent amount and contact information 	30 days (current within 6 weeks)
<u>School Grants, Scholarships & Other Student Aid</u>		X	N/A	N/A
<u>Self-Employment Earnings/Day Labor</u>	X		<ul style="list-style-type: none"> • Signed self-employment statement showing gross receipts, gross expenses, and net income for a one month time period • Copy of current signed and dated 1040 Federal Tax Form, signed by applicant(s) OR licensed tax return preparer (or both) • Income statement showing most recent quarterly adjusted earnings • Affidavit from applicant's accountant 	30 days (current within 6 weeks)

<u>SSA (Federal) – Social Security Administration</u>	X		<ul style="list-style-type: none"> • Copy of most recent Award Letter or Notice of Action • Copy of bank statement showing direct deposit • HUD statement with social security amount • Copy of check • Form 1099 	30 days (current within 6 weeks)
<u>Union Strike Funds</u>	X		<ul style="list-style-type: none"> • Copy of benefits payment stubs 	30 days (current within 6 weeks)
<u>Survivor's Benefits</u>	X		<ul style="list-style-type: none"> • Copy of current check • Current check stub • Current printout • Current Award Letter • Bank statement with direct deposit 	30 days (current within 6 weeks)
<u>SSI/SSP</u>	X		<ul style="list-style-type: none"> • Copy of check • Payee's (income recipient) letter of verification showing income amount • Notice of Planned Action • Copy of back statement showing direct deposit • HUD statement with Social Security amount • Annual benefit letter with current dates • Computer printout or letter that states the current annual benefit amount • Form 2458 completed by Social Security Office 	30 days (current within 6 weeks)