

CLIENT BUDGET WORKSHEET

CLIENT NAME _____ DATE: _____

Program Name: _____ Type of Assistance: _____

Number in household: _____

Total monthly income: _____ Total monthly expenses: _____

This budget form is being provided to you to assist you in meeting your household expenses and energy costs. One of the requirements of the Energy Assistance Program/s that you have applied for is completion of a household budget and budget counseling. Included on Pages 2 and 3 are some budgeting and money saving tips for you and your family.

Income Sources	Household Member's Name	Monthly Amount
Salary/Wages		\$
TNAF/GA		\$
SSA/Retirement		\$
SSI		\$
UIB		\$
State Disability		\$
Unemployment		\$
Child Support		\$
Alimony		\$
Pension		\$
Self Employment		\$
Investment Income		\$
Other: _____		\$
Other: _____		\$
Other: _____		\$

MONTHLY EXPENSES

Rent or Mortgage	\$	Medical Insurance	\$	Clothing	\$
Gas or Propane	\$	Out of pocket Medical	\$	Life Insurance Policy	\$
Electric	\$	Public Transportation	\$	Furniture Payment	\$
Water	\$	Automobile Payment	\$	Credit Card Payments	\$
Garbage	\$	Car Insurance Payment	\$	Childcare	\$
Phone	\$	Gasoline/Care Repairs	\$	Other	\$
Cell Phone	\$	Household Supplies	\$	Other	\$
Cable/DT V	\$	Food	\$	Other	\$

Plan to Increase Income and Reduce Expenses:

Action

Target Date:

1.	
2.	
3.	
4.	

Client's Signature: _____ Date: _____

BUDGETING TIPS

A household budget is based on your income and expenses. It helps you to keep track of how much you spend and adjust your spending so you do not exceed your income. Creating a household budget will help you to better manage your money.

- It is important to create a realistic budget and stick to it. Look at it whenever you are tempted to spend.
- The first step in creating a budget is to track your expenses of the last three months or more, to get an idea of regular payments. Gather all the receipts and write down the individual amounts. Create a budget that you can live with and follow easily. Once you have your budget, study it carefully and try to reduce unnecessary expenses. This will ensure that your finances get back on track. You may be spending on articles that are of no real importance and are unnecessarily draining your income. Identify these expenses and eliminate them.
- The next important step is to determine the amount you need to set aside for monthly bills. Remember to set aside some money for the savings account whenever possible. Make payments on a priority basis, paying off all the essential monthly bills and only then using the remaining amount for household expenses, like groceries and toiletries.

MONEY SAVING TIPS

Are you paying for the same service twice?

Most households subscribe to cable T.V. A good portion of cable subscribers also pay an additional expense for one or more movie channels. It's not unusual for these same families to rent movies from video stores and/or subscribe to a movie service via mail. In this scenario, there are now three resources included in the household budget for movie viewing entertainment. Reducing this household expense could save hundreds of dollars per year.

Don't pay for services that you don't use or really don't need?

This is most common with home phone services. Features like call waiting, caller ID, return call service, long distance packages, cell phone packages. Do you really need it? Eliminating little money leaks like this adds up to significant yearly budget savings. Review all of your household expense bills to see if you're paying extra for services you don't need. Eliminate extra services and the fees that go with them whenever possible.

Make every effort to minimize costs on essential household expenses.

Sometimes making lifestyle changes can reduce expenses significantly. During the summer months, don't turn on the air conditioner until you just can't take it anymore. Not using the air conditioner will save the most on home energy expenses. However, this may not be an option for those who have heat related, or aggravated, health problems. Many gas and electric providers offer energy efficiency evaluations for your house, free of charge. Take advantage of this service to see where you can make home improvements that could mean substantial savings in energy costs. They may also offer suggestions for lifestyle changes that can reduce energy expenses even further. During winter months lower your thermostat a few degrees and dress warmer if necessary.

Review, remove, and reduce expenses to stop wasting money and trim your household budget. Analyze each household expense for necessity and the costs associated with it. Make an effort to reduce each expense to the minimum amount possible, while still meeting your family's needs. Before you know it you'll be saving hundreds, if not thousands, of dollars on your household budget expenses each year.

1. Do you need it? This first rule of shopping frugal is, "don't buy it if you don't really need it". If you really want to save money and spend wisely, you shouldn't buy items that you don't really need now. Being patient has benefits. Sometimes good deals come along if you wait. You may find you no longer need the item at all or it is drastically reduced in price in the future.

2. Plan for spending - If purchases are planned and included in your household or personal budget they are not a financial strain. Plan for major holiday shopping and shop sales throughout the year to save money on your Christmas budget.

3. Organize shopping trips and make shopping lists - Make a list to keep your shopping focused on the shopping plan. Keep an organized list or calendar recording birthdays, anniversaries, and other special occasions. You can make special gift purchases when you come across great sales, clearance, or closeout items throughout the year to plan ahead for these events. You can save money shopping for gifts throughout the year during sales events.

4. Do research - If you're buying an expensive item or a large household appliance, doing a little research could save you a lot of money. Know your options. What is available, and what suits your personal needs? Informed consumers make smarter purchase decisions.

5. Compare prices - Always shop around at discount stores, thrift stores, clearance and closeouts and compare prices before making a final purchase. When you know what an item is worth, you'll know when it is "really" a good deal! An informed consumer always saves more money.

6. Know your rights - Can you return the item or is it a final sale. Know your warranty conditions and what the warranty covers. Consider costs and benefits when purchasing additional warranties, especially on large appliances. Avoid paying additional costs for warranties on low cost small appliances.

Client Refusal

I (Print Name): _____ refuse to participate in the completion of the household budget. I understand that my refusal to participate in the requirements of the program may jeopardize my receiving benefits/services.

I was provided with a blank copy of the Client Budget Worksheet.

Client's Signature

Date

Department of Community Services and Development

Energy Intake Form

CSD 43 (10/2017)

Official Use Only:	
Priority Points	
A.C.C.	
Eligibility Cert Date	

Agency:	Intake Initials:	Intake Date:		
First name	Middle Initial	Last Name	Date of Birth MM/DD/YY	
SERVICE ADDRESS – Address where you live (this <i>cannot</i> be a P.O. Box)				
Service Address			Unit Number	
Service City	Service County	Service State	Service Zip Code	
Have you lived at this residence during each of the past 12 months? <input type="checkbox"/> Yes <input type="checkbox"/> No				
Is your service address the same as mailing address?..... <input type="checkbox"/> Yes <input type="checkbox"/> No				
Mailing Address			Unit Number	
Mailing City	Mailing County	Mailing State	Mailing Zip Code	
Social Security Number (SSN):				Telephone Number ()
E-mail Address:				

PEOPLE LIVING IN HOUSEHOLD		INCOME	
Enter the total number of people living in the household, including yourself		Enter the total number of people who receive income	
<i>Demographics: Enter the number of people in the household who are:</i>		<i>Enter the total gross monthly income for all people living in the household:</i>	
Ages 0 – 2 Years		TANF / CalWorks	\$
Ages 3 - 5 years		SSI / SSP	\$
Ages 6 - 18 years		SSA / SSDI	\$
Ages 19 - 59		Paycheck(s)	\$
Ages 60 and older		Interest	\$
Disabled		Pension	\$
Native American		Other	\$
Seasonal or Migrant Farmworker		Total Monthly Income	\$

HOUSEHOLD MEMBERS					
ENTER THE INFORMATION BELOW FOR ALL HOUSEHOLD MEMBERS.					
If you have more than 7 people in your household, please list the information on a separate piece of paper.					
First Name	Last Name	Relation to Applicant	Date of Birth MM/DD/YY	Amount of Gross Monthly Income (Before Taxes and Deductions)	Source of Income
		Self			
Household Total Monthly Gross Income				\$	
Are you or someone in your household CURRENTLY receiving CalFresh (Food Stamps)? <input type="checkbox"/> Yes <input type="checkbox"/> No					

PAY BILL

To which energy bill (CHOOSE ONLY ONE) do you want the LIHEAP benefit to be applied? (Attach complete copy of most recent bill or receipt)

- Natural Gas Electricity Wood Propane Fuel Oil Kerosene Other Fuel

Enter the energy company and account number:

Company Name: _____ Account #: _____

Is your utility service shut-off? Yes No

Do you have a past due notice? Yes No

Are your utilities included in rent or submetered? Yes No

Are your utilities all electric? Yes No

Is your Natural Gas Company the same as your Electric Company? Yes No

WOOD, PROPANE or FUEL OIL SERVICE (WPO)

Are you currently out of fuel? (Wood, Propane, Oil, Kerosene, Other Fuels) Yes No N/A

List the approximate number of days until you run out of fuel (Wood, Propane, Oil, Kerosene, Other Fuels).

Number of Days: _____ N/A

ENERGY INFORMATION

The questions below are **MANDATORY**. Please check all energy sources used to heat your home.

A copy of **all** recent energy bills and/or receipts for any home energy cost **must** be provided.

NOTE: A copy of an electric bill must be included even if you do not use electricity to heat your home.

What is the main fuel used to HEAT your home? One main heating source **MUST** be checked.

- Natural Gas Electricity Wood Propane Fuel Oil Kerosene Other Fuel

In addition to your main heating source, do you ever use any of the following to heat your home (you can select more than one):

- Natural Gas Electricity Wood Propane Fuel Oil Kerosene Other Fuel N/A

Are you the account holder: Electric Bill Yes No Natural Gas Bill Yes No

The information on this application will be used to determine and verify my eligibility for assistance. By signing below, I give my consent (permission) to CSD, its contractors, consultants, other federal or state agencies (CSD Partners) and to my utility company and its contractors, to share information about my household's utility account, energy usage and/or other information needed to provide services and benefits to me as described at the end of the form. My consent shall be effective for the period beginning 24 months prior to, and continuing for 36 months after, the date signed below. I understand that if my application for LIHEAP/DOE benefits or services is denied, or if I receive untimely response or unsatisfactory performance, I may initiate a written appeal with the local service provider and my appeal shall be reviewed no later than 15 days after the appeal is received. If I am not satisfied with the local service provider's decision I may then appeal to the Department of Community Services and Development pursuant to Title 22, California Code of Regulations section 100805. If applicable, I hereby authorize installation of weatherization measures to my residence at no cost to me. I declare, under penalty of perjury, that the information on this application is true, correct, and that the funds received will be used solely for the purpose of paying my energy costs.

X
*** APPLICANT'S SIGNATURE ***
Date

AGENCY NAME: Community Services and Development (CSD). UNIT RESPONSIBLE FOR MAINTENANCE: Home Energy Assistance Program (HEAP). AUTHORITY: Government Code Section 16367.6 (a) Names CSD as the agency responsible for managing HEAP. PURPOSE: The information you provide will be used to decide if you are eligible for a LIHEAP payment and/or weatherization services. GIVING INFORMATION: This program is voluntary. If you choose to apply for assistance, you must give all required information. OTHER INFORMATION: CSD uses statistical definitions from the annual update of the Department of Health and Human Services' State Median Income, Federal Income Poverty Guidelines, to determine program eligibility. During application processing, CSD's designated subcontractor may need to ask you for more information to decide your eligibility for either or both programs. ACCESS: CSD's designated subcontractor will keep your completed application and other information, if used, to determine your eligibility. You have the right to access all records holding information about you. CSD does not discriminate in the provision of services on the basis of race, religious creed, color, national origin, ancestry, physical disability, mental disability, medical condition, marital status, sex, age, or sexual orientation.

APPLICANT: DO NOT FILL OUT THE INFORMATION BELOW. THIS SECTION IS FOR OFFICIAL USE ONLY.

Utility Assistance being provided under which program → HEAP Fast Track HEAP WPO ECIP WPO

Base Benefit \$ _____ Supplement \$ _____ Total Benefit \$ _____

Total Energy Cost \$ _____ Energy Burden _____

Energy Services Restored after disconnection: Yes No Disconnection of Energy Services prevented: Yes No

Home Referred for WX: Home Already Weatherized: