Utility Service Intake Form

The questions below will help you gather the information needed to advocate on behalf of your client. After attending the “Stay Connected” training and using the handbook as a reference, this intake form will help you determine what resources and options are available to your client.

1. Is the customer having a problem with:
   ____ Gas bill  ____ Electric bill  ____ Both

2. Is service:
   ____ Currently connected, but at risk of termination
   ____ Currently connected and not at risk of disconnection
   ____ Currently disconnected

3. How much money is currently due:
   _______ Electric bill
   _______ Gas bill

4. Approximate household income:
   ____ Less than $1,000/month
   ____ $1,000 to $1,500/month
   ____ $1,500 to $2,000/month
   ____ $2,000 to $2,500/month
   ____ More than $2,500

5. Is your client on the discount rates (Y/N)?
   ____ Electric
   ____ Gas

   ____ My client’s income is below 60% of median income ($65,387 for a family of 4, in FY2017 and $66,115 for a family of four, in FY 2018; higher or lower amounts for larger or smaller families)

Light Pink
6. Does the client receive fuel assistance (Y/N)? ____

7. Own ____ Rent ____

8. Heating service (check which fuel is used to heat and whether the landlord or tenant pays for the heating fuel):
   ____ Gas     ____ Tenant pays     ____ Landlord pays
   ____ Oil     ____ Tenant pays     ____ Landlord pays
   ____ Electric ____ Tenant pays     ____ Landlord pays

9. Residents:
   Is there a child under the age of 12 months living in the unit  Y_____ N____
   Is there someone in the unit who is seriously ill (mental or physical illness qualifies) Y_____  N____
   If there is an illness, is it chronic/long-term?  Y____N
   Are all adults in the household 65 years of age or older?  Y ____  N____

10. Can your client afford to pay 25% of the past due bill?