



Utility Help Toolkit 2025

Practical resources for older adults managing utility costs

Includes:

- **QuickStart Cheat Sheet** — emergency and ongoing utility help
- **Application Checklist** — documents to gather before applying
- 📞 **Call Script & FollowUp Log** — what to say and how to track responses

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Utility Bills Help — Quick Start Cheat Sheet

Emergency First

- Call 2-1-1 immediately if you have a shut-off notice or no heat/cooling.
- Ask your utility for a payment plan and any senior or medical shut-off protections.

Apply In This Order

- LIHEAP — bill payment help (regular + crisis). Apply early when your state window opens.
- Weatherization (WAP) — fixes drafts, insulation, and unsafe or inefficient heating/cooling.
- Lifeline — monthly discount for phone or internet (higher on tribal lands).
- Local/utility programs — discount rates, arrearage forgiveness, and medical protections.

Documents to Gather

- Recent utility bill(s); Social Security or pension income statements.
- Photo ID and IDs for all household members; lease or mortgage document.
- Shut-off notice (if any) and a doctor's note if you rely on power for medical needs.

Top Tips

- Apply in the first week the program opens; seniors may get priority windows.
- Keep copies of everything; write confirmation numbers and names after each call.
- If denied, ask about appeals and any emergency funds or moratoriums.



Utility Assistance Application Checklist

Always Needed

- ■ Government-issued photo ID (you).
- ■ IDs (or birth certificates) for all household members.
- ■ Most recent utility bill(s) — electric, gas, or water.
- ■ Social Security and/or pension income statement(s).
- ■ Lease, mortgage, or property tax statement.

Sometimes Needed

- ■ Proof of disability (SSI/SSDI letter) or doctor's note for medical protections.
- ■ Proof of hardship — shut-off notice, unemployment, or disaster documentation.
- ■ Last 4–8 weeks of pay stubs (if anyone works) or bank statement if asked.

Before You Go / Submit

- ■ Know your total household income and household size.
- ■ List any medical equipment that needs electricity (oxygen, CPAP).
- ■ Ask about crisis assistance and winter/summer moratoriums.
- ■ Write the caseworker's name, date, and confirmation or case number.



Call Script & Follow-Up Log

How to Start the Call

- “Hello, my name is _____. I’m a senior and I need help with my utility bill to avoid shut-off.”
- “I have my bill and income documents ready. Could you tell me which programs I qualify for and how to apply?”

Key Questions

- Do you offer crisis (expedited) help if I have a shut-off notice?
- What documents do you need, and can I apply by phone or online?
- Are there senior priority dates or disability accommodations?
- If I’m denied, how do I appeal or request emergency funds?

For Your Utility Company

- Can I set up an affordable payment plan?
- Do you have medical shut-off protections or senior discounts?
- Can you note my account that I’m applying for LIHEAP/WAP?

Follow-Up Log

Use this space to track your calls and deadlines:

Date | Agency/Utility | Who I Spoke With | Phone/Email | Case/Ref # | Notes | Due Date
