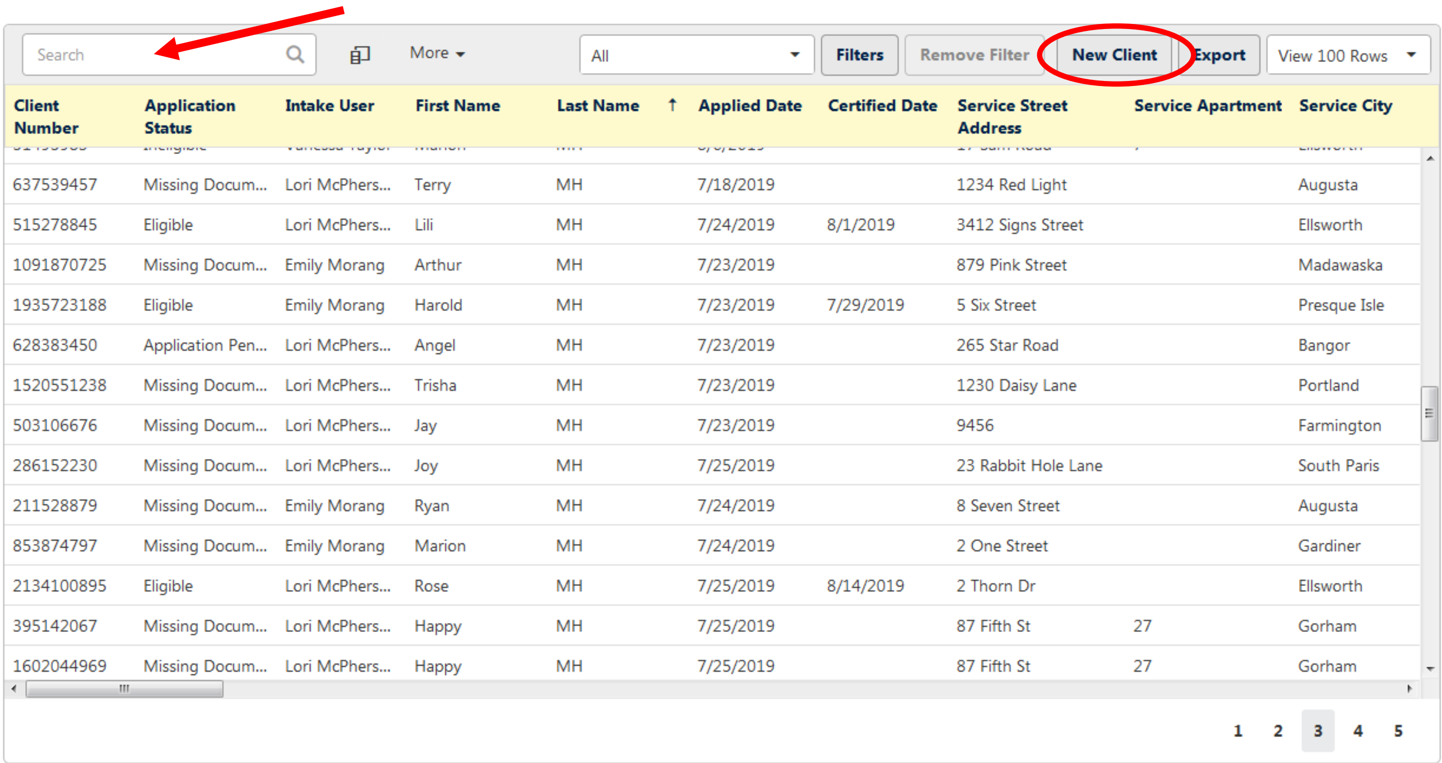
How to Complete an Application in HEAP Cloud

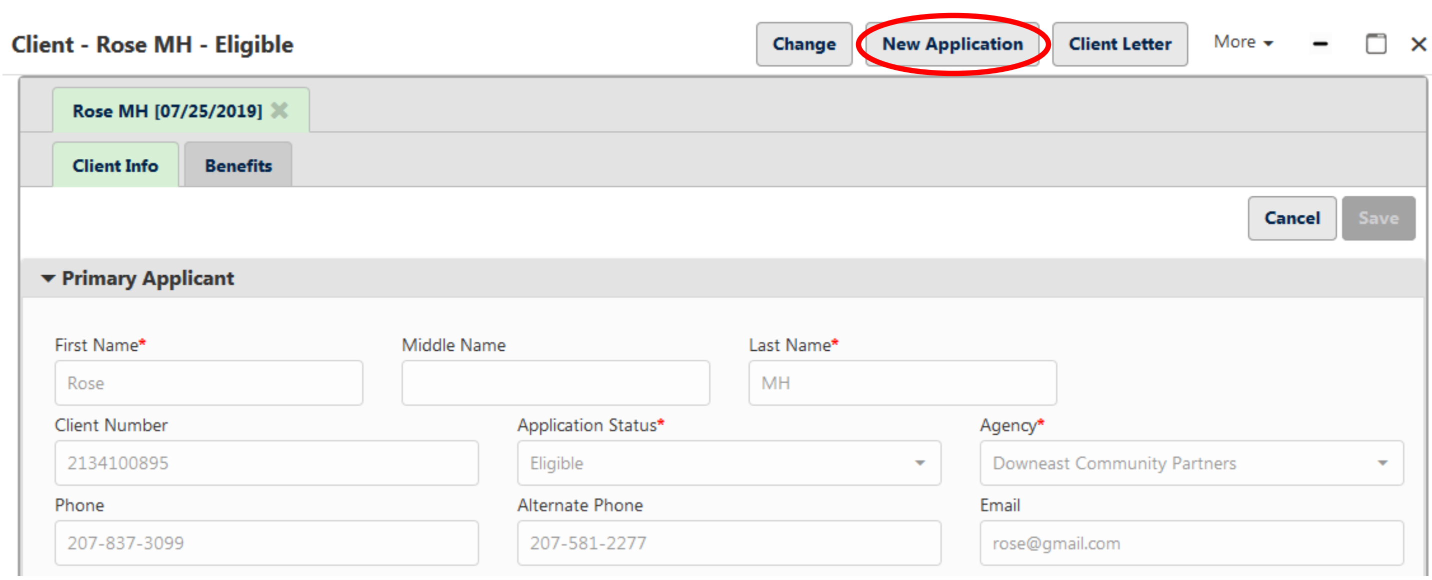
Upon logging in to HEAP Cloud, you will see the Client Screen below.

To start an application for someone who has not previously applied, click on the 'New Client' button to the top right side of the screen.



Client Number	Application Status	Intake User	First Name	Last Name	Applied Date	Certified Date	Service Street Address	Service Apartment	Service City
637539457	Missing Docum...	Lori McPhers...	Terry	MH	7/18/2019		1234 Red Light		Augusta
515278845	Eligible	Lori McPhers...	Lili	MH	7/24/2019	8/1/2019	3412 Signs Street		Ellsworth
1091870725	Missing Docum...	Emily Morang	Arthur	MH	7/23/2019		879 Pink Street		Madawaska
1935723188	Eligible	Emily Morang	Harold	MH	7/23/2019	7/29/2019	5 Six Street		Presque Isle
628383450	Application Pen...	Lori McPhers...	Angel	MH	7/23/2019		265 Star Road		Bangor
1520551238	Missing Docum...	Lori McPhers...	Trisha	MH	7/23/2019		1230 Daisy Lane		Portland
503106676	Missing Docum...	Lori McPhers...	Jay	MH	7/23/2019		9456		Farmington
286152230	Missing Docum...	Lori McPhers...	Joy	MH	7/25/2019		23 Rabbit Hole Lane		South Paris
211528879	Missing Docum...	Emily Morang	Ryan	MH	7/24/2019		8 Seven Street		Augusta
853874797	Missing Docum...	Emily Morang	Marion	MH	7/24/2019		2 One Street		Gardiner
2134100895	Eligible	Lori McPhers...	Rose	MH	7/25/2019	8/14/2019	2 Thorn Dr		Ellsworth
395142067	Missing Docum...	Lori McPhers...	Happy	MH	7/25/2019		87 Fifth St	27	Gorham
1602044969	Missing Docum...	Lori McPhers...	Happy	MH	7/25/2019		87 Fifth St	27	Gorham

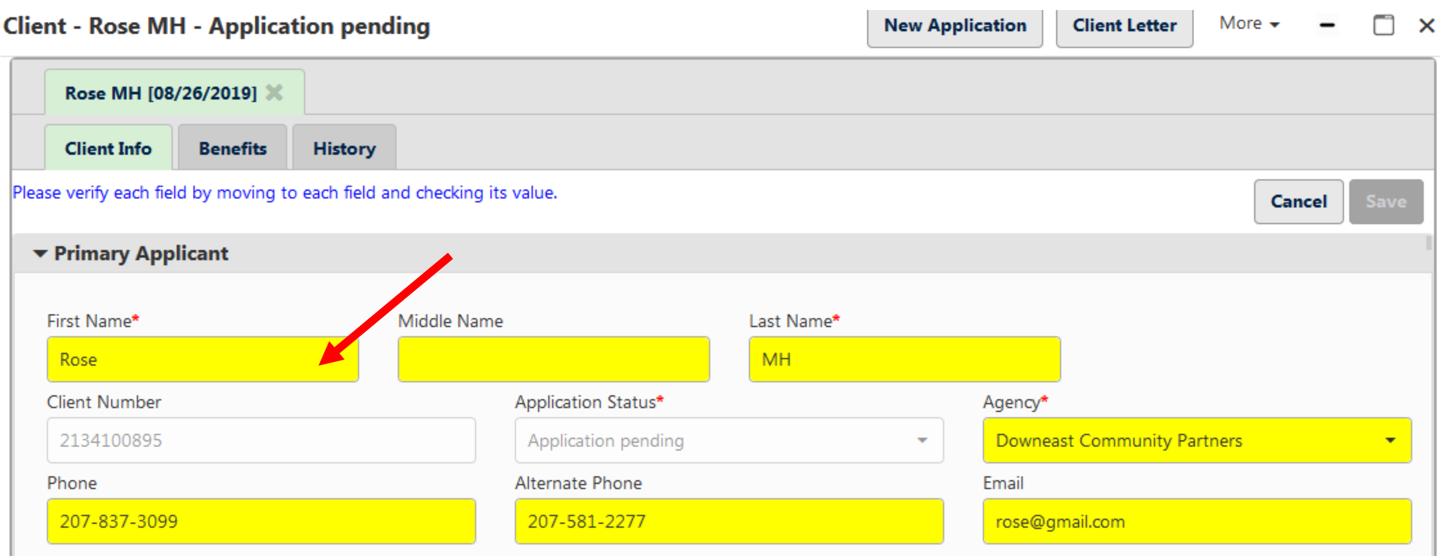
To start an application for someone who has previously applied, search for and open the person's previous application from the Client Screen (above) and then click on the 'New Application' button on the top right side of the screen.



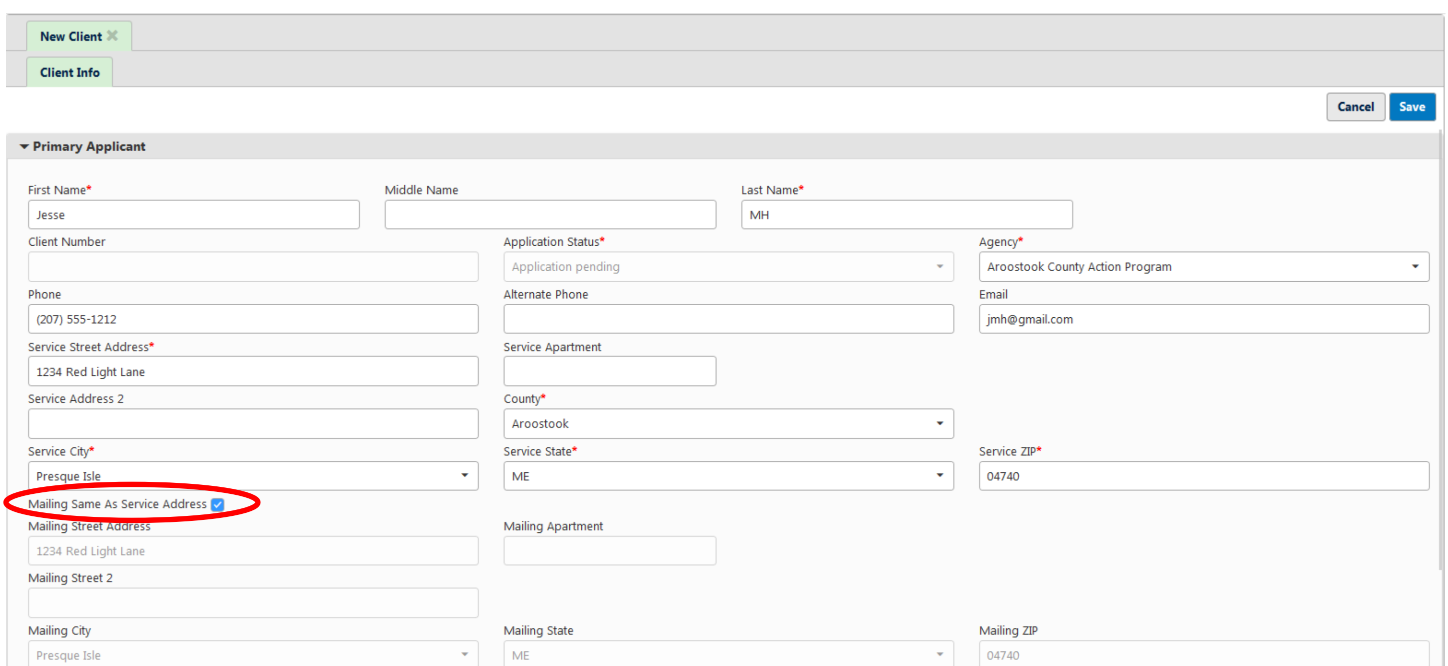
By clicking either the 'New Client' or 'New Application' buttons, you will begin the application. For New Clients, the system will auto generate a Client Number which cannot be changed.

The first section to complete will be the 'Primary Applicant' section shown below. Enter all applicable information regarding the Primary Applicant. Fields designated with a red asterisk (*) are required fields and must be completed in order to process the Application.

Note: If an application is being completed for someone who has previously applied, most fields will be populated with the previous applications information; however, each field will be highlighted yellow. Each field must be reviewed for accuracy and updated as needed. As you tab through each field the yellow highlight will be removed. All other fields must be filled in as they would be for a new applicant.



If the Household's mailing and physical addresses are the same, click the 'Mailing Same as Service Address' box. This will autofill the mailing address fields.



Once the 'Primary Applicant' section is complete, move on to the 'Application' section.

Each section of the Application can be opened and closed by clicking on the triangle immedicately preceeding the section header. You can close each section once completed or keep them open throughout the application process; whichever is prefered.

Fields that are greyed out, such as Approval Status and Intake User, will be autopopulated and cannot be changed.

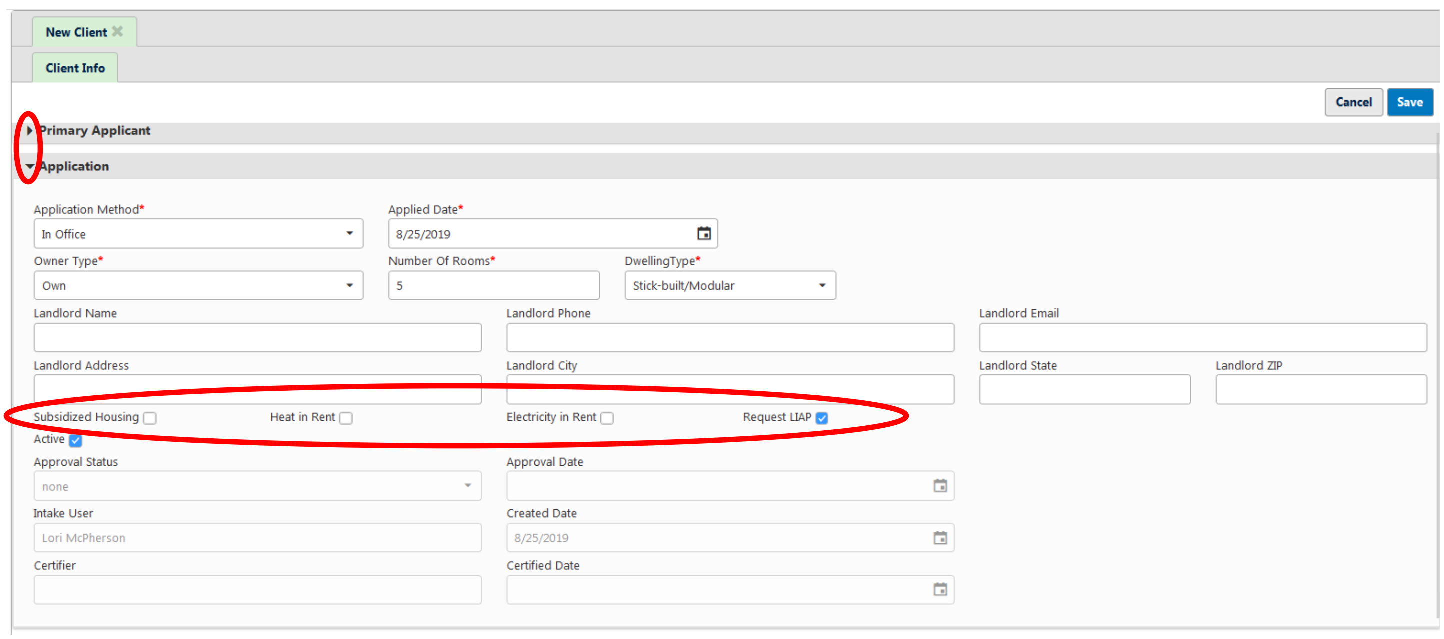
If the 'Owner Type' is Rent, the Landlord Information <u>must</u> be filled in.

If the Household receives a subsidy towards their rent <u>OR</u> mortgage, click the 'Subsidized Housing' box.

If the Household's rent includes heat, click the 'Heat in Rent' box.

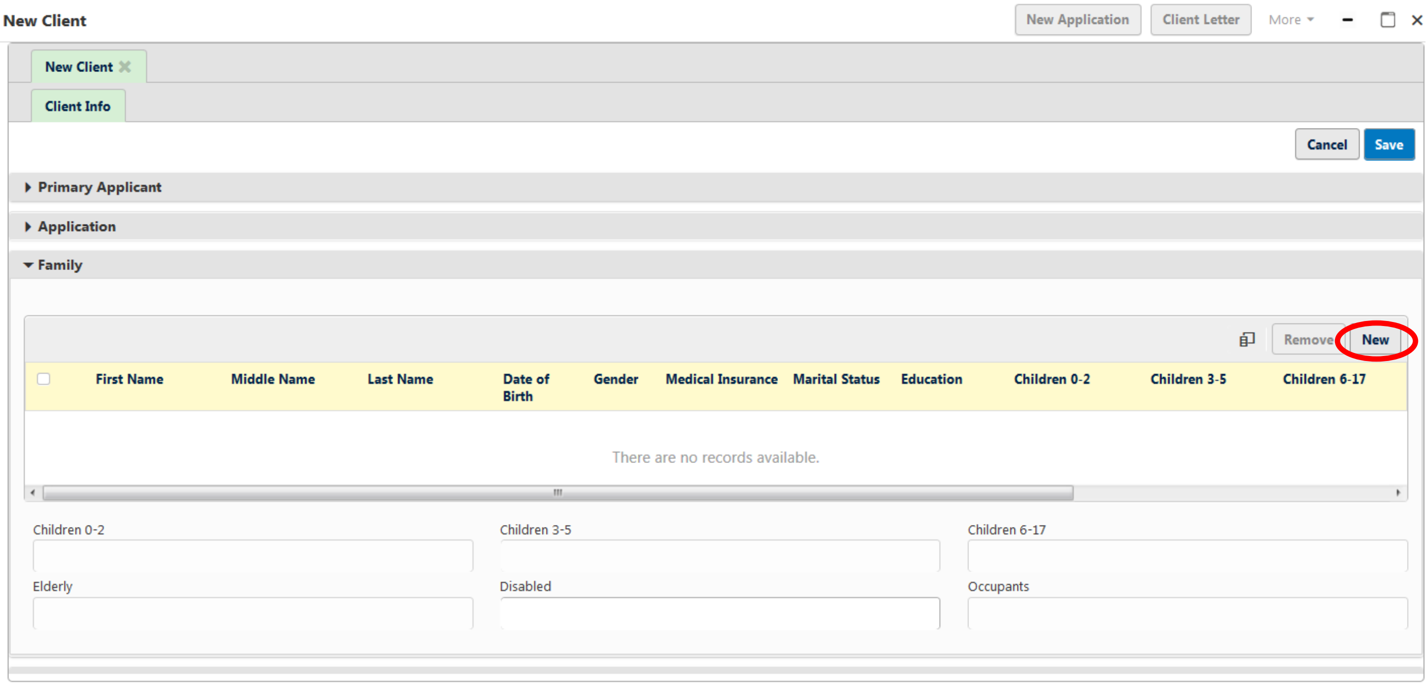
If the Household's rent includes electricity, click the 'Electricity in Rent' box.

If the Household requests LIAP, click the 'Request LIAP' box.



The next section to complete is the 'Family' section.

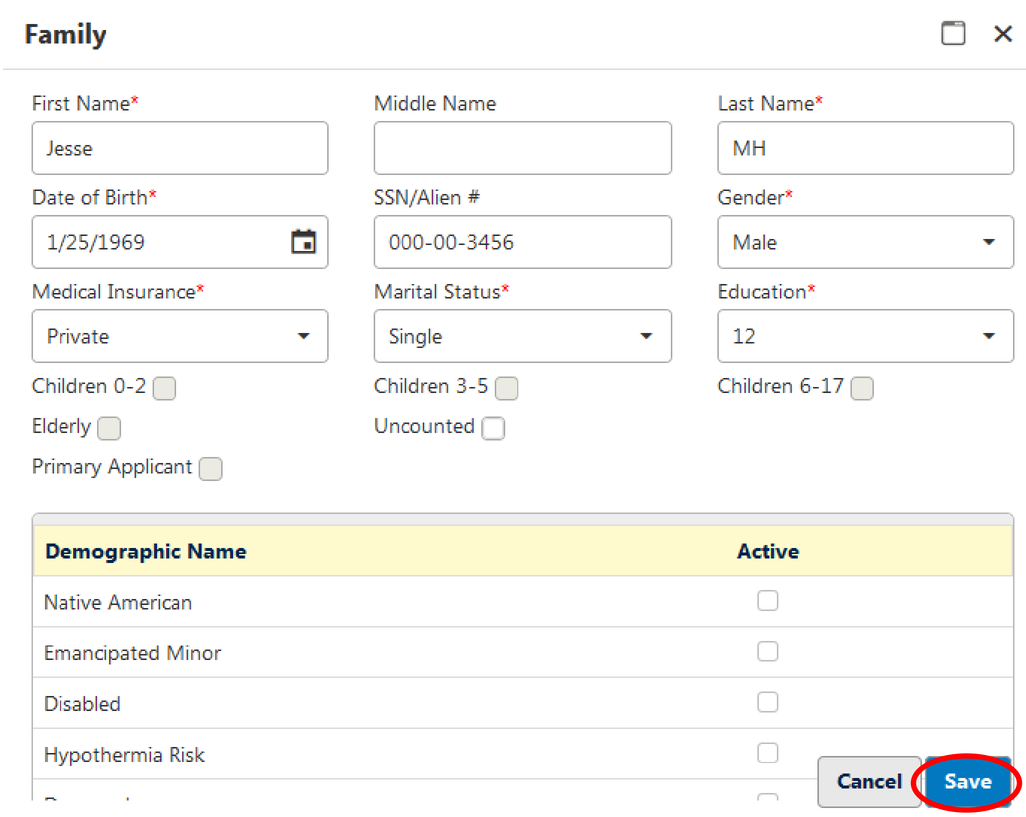
When the section is first opened, there will be no family members listed. To populate the Primary Applicant in the grid, click 'New'.



A Family box will pop up to enter the demographics in for the Primary Applicant.

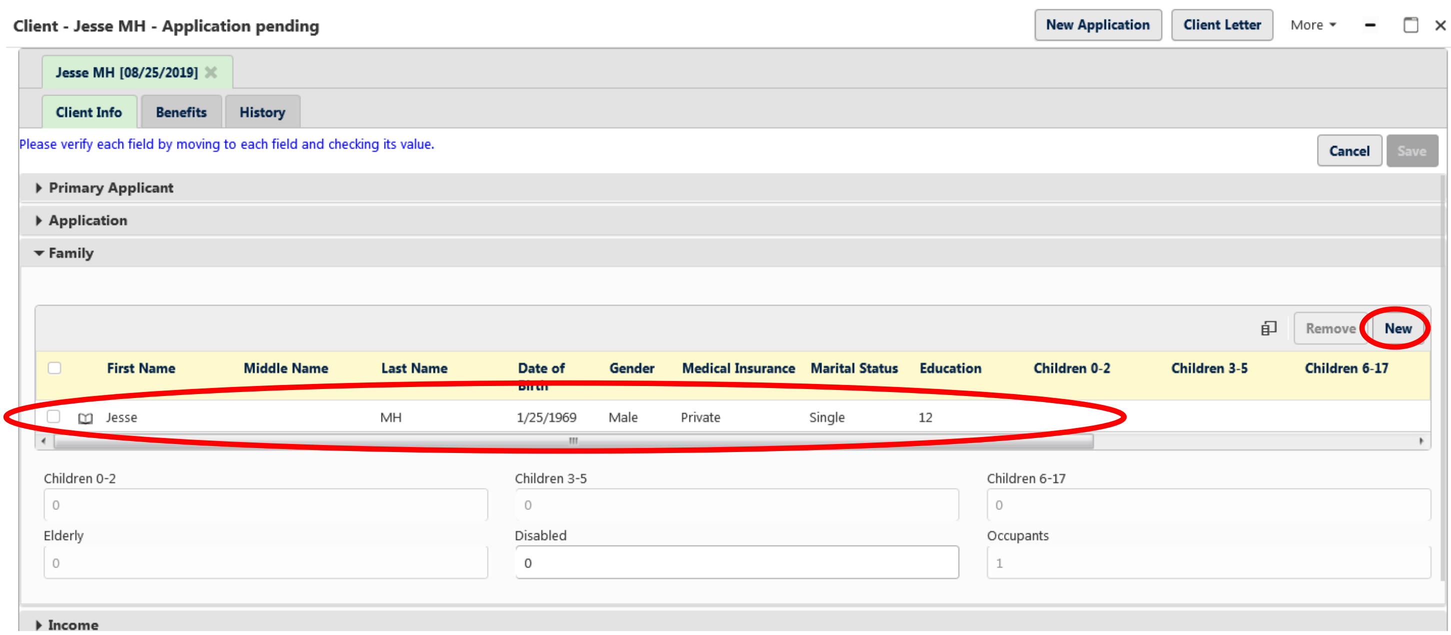
Although the SSN/Alien # field does not have a red asterisk, it is required for all Household members over 2 years of age.

Once the Primary Applicant's information has been entered, click 'Save' to save the data and close the pop up box.

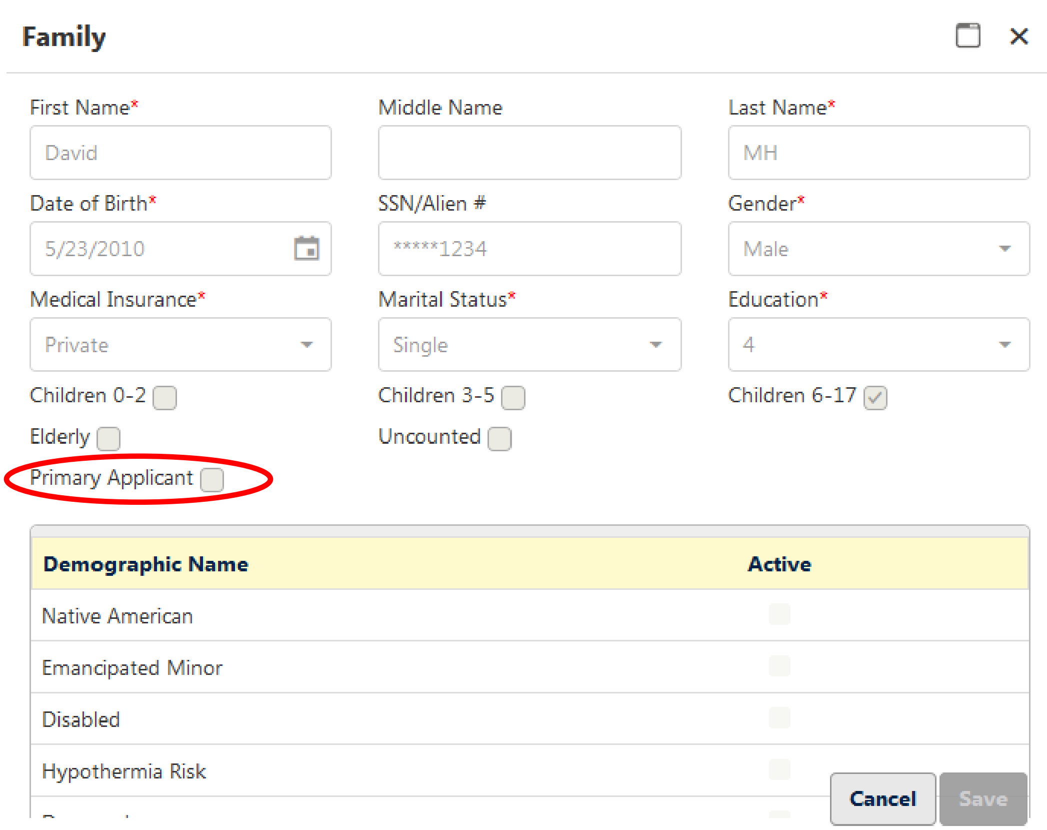


After the pop up box saves and closes, you will see the Primary Applicant's demographics in the Family section grid.

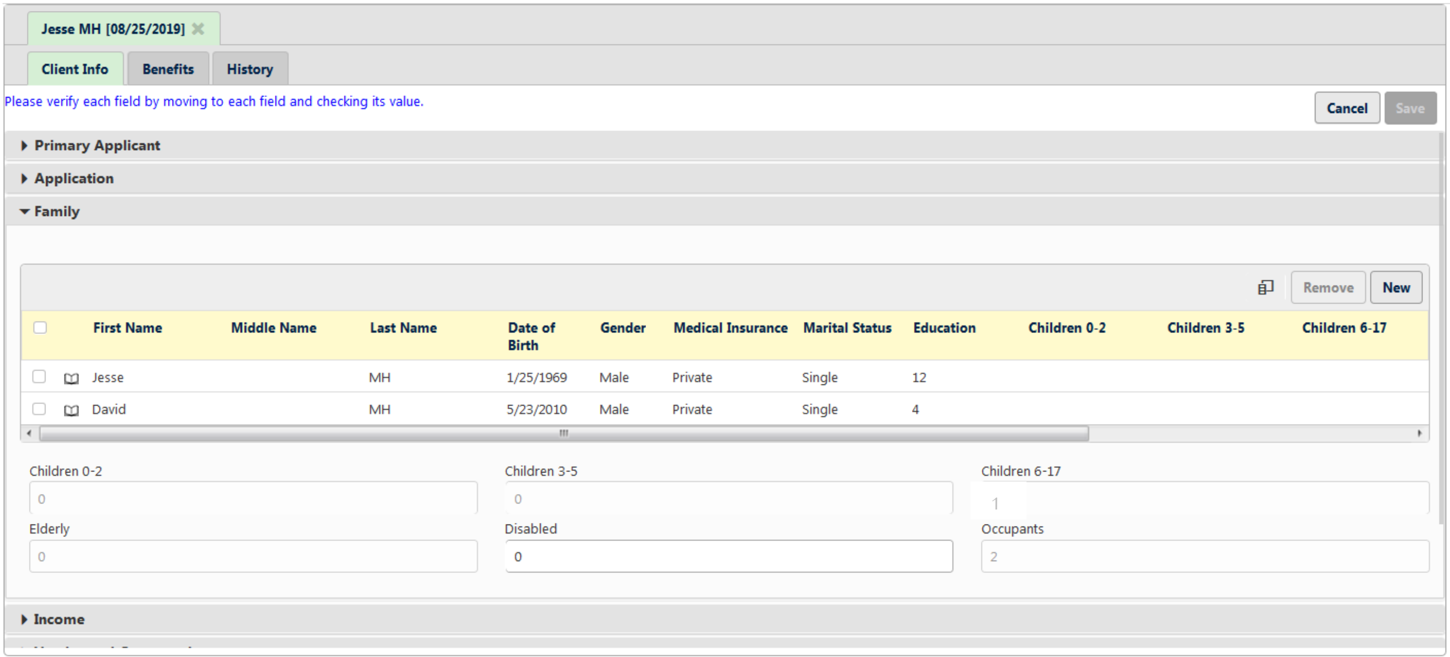
Click 'New' to add additional Household members, as you did for the Primary Applicant.



Additional Household members will need all of the same information entered as the Primary Applicant. However, the 'Primary Applicant' check box will not be selected.



Once all Household members are entered, they will all appear in the Family section grid. The demographics section below the grid will display the appropriate demographic information for the Household.

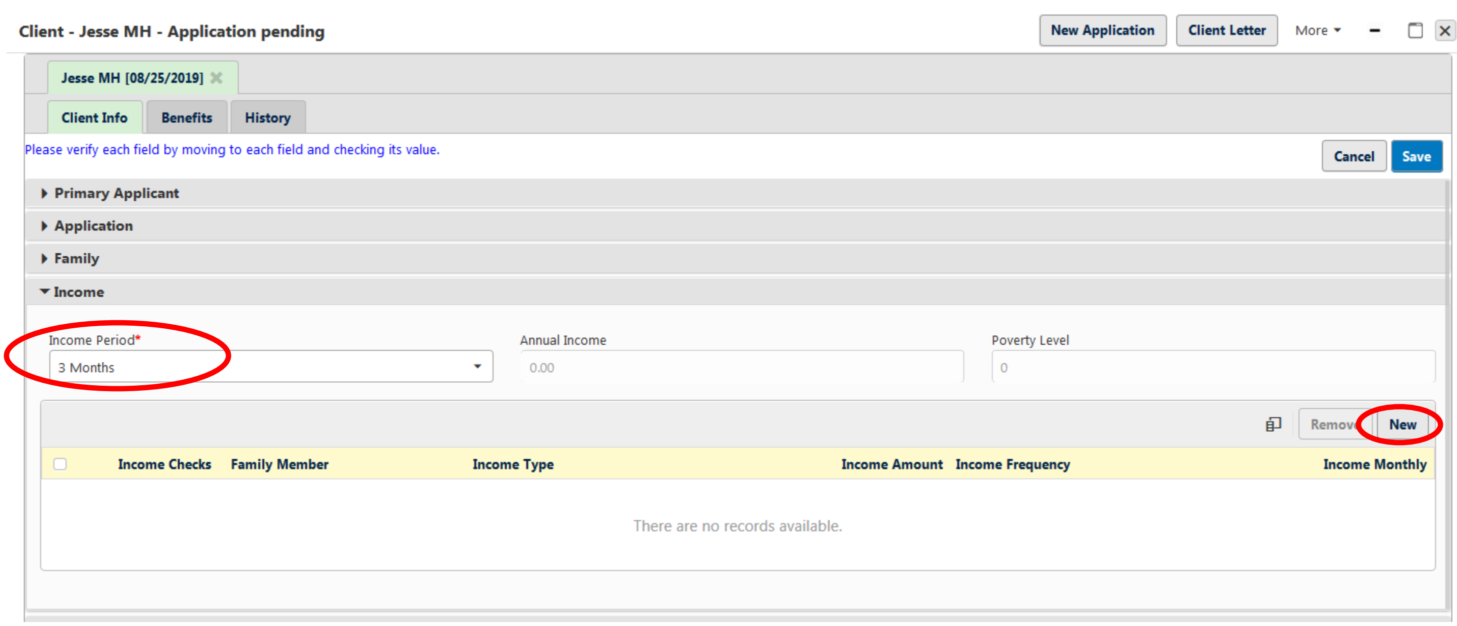


The next section to complete is the 'Income' section.

Select the Income Period in the first drop down. For standard Applications, the Household can choose 3 Months or 12 Months. The 30 Days and 1 Month options can only be selected on an ECIP Only Application.

Since the Annual Income and Poverty Level fields are greyed out, they will be auto populated.

To add income for a Household member, click 'New'.



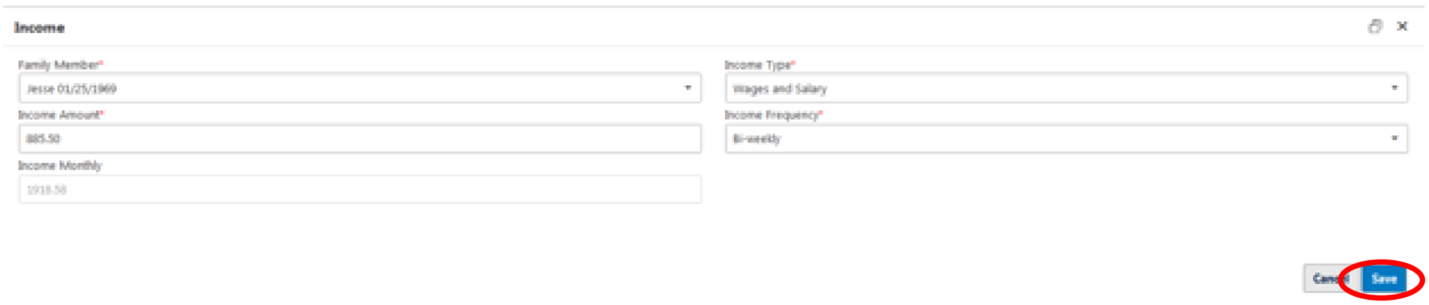
An Income box will pop up. Select the name of Household member receiving the income in the Family Member drop down. The Date of Birth will also appear in case there are Household members with the same name.

Select the appropriate Income Type, Income Amount and Income Frequency in the corresponding drop down fields.

Note: You will not need to total the income for the entire Income Period and enter as one amount (Example: If Household member receives $500.00 Social Security, enter $500.00 Monthly instead of $1500.00 Quarterly), except in the case of fluctuating Wages. Wages will need to be totaled for the entire Income Period and entered as one amount using the Income Period as the Income Frequency.

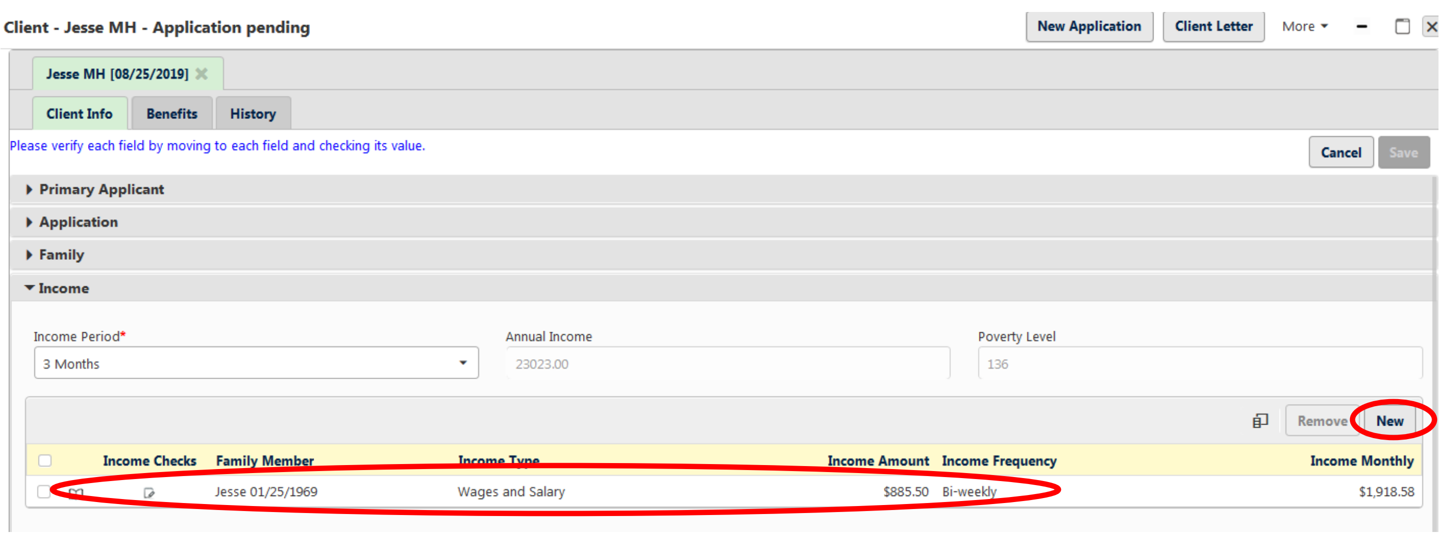
The Monthly Income will be auto populated, based on the information that is entered.

Once the Household member's income information has been entered, click 'Save' to save the data and close the pop up box.



After the pop up box saves and closes, you will see the Income that was entered listed in the Income section grid.

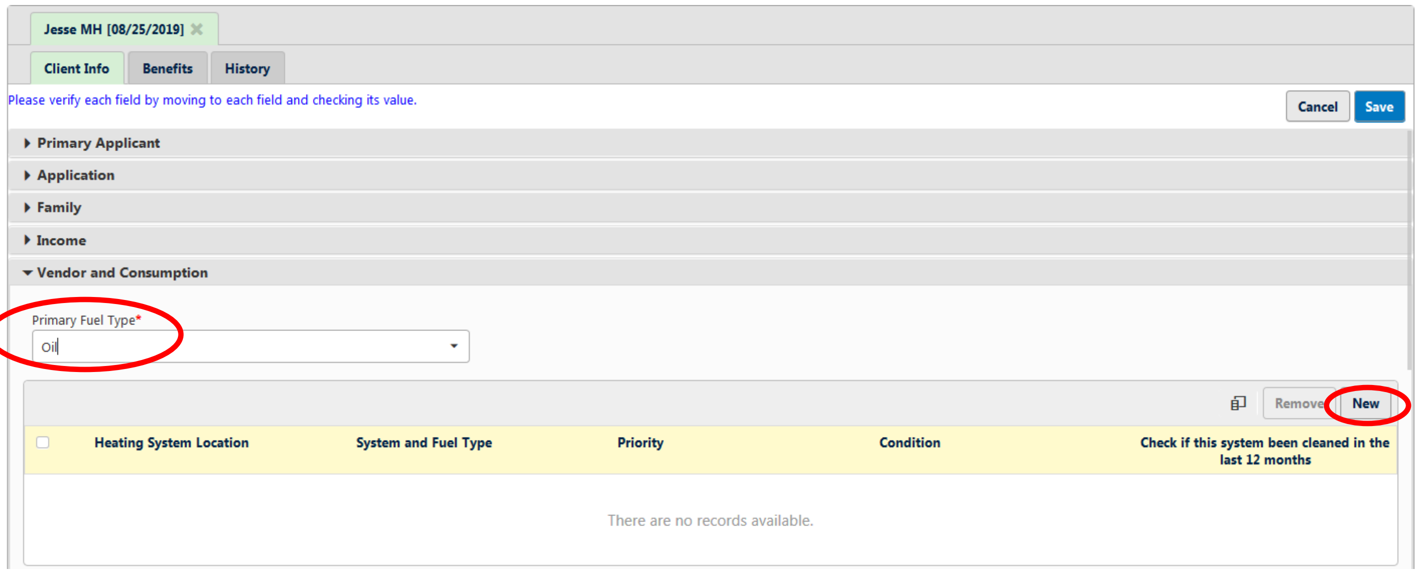
Click 'New' to add additional Income rows to the Income section grid. Each Household member over the age of 18 years must have an Income row listed, even if they have zero income.



Once all Household Income has been entered, move on to the 'Vendor and Consumption' section.

In the first drop down, enter the Primary Fuel Type. This does not need to be the Fuel Type for which the benefit is issued. It must be the Primary Fuel Type for the Household, meaning which ever Fuel Type the Household uses most and spends the most money on.

The first grid is to document permanently installed Heating Systems. Click 'New' to add a system.



A Heating System pop up box will appear.

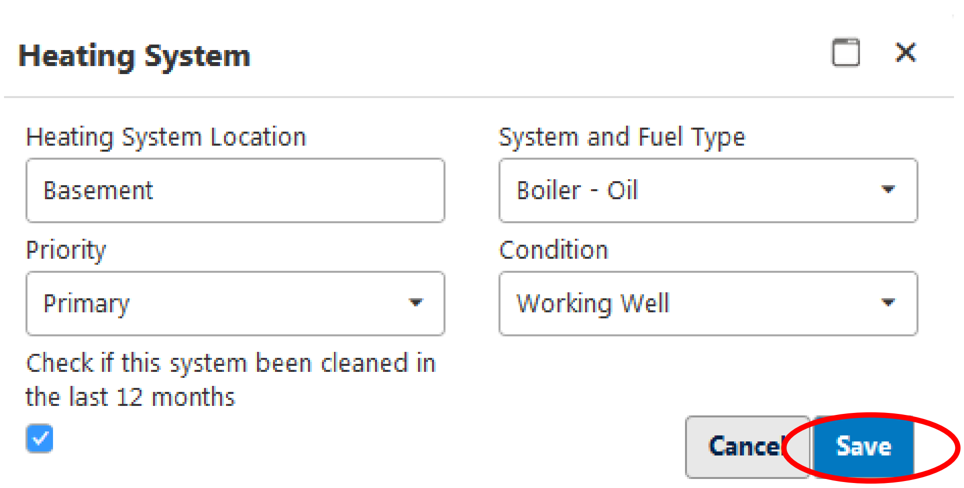
Enter the Heating system location in the free text field (Ex. Basement, Living Room, Attic, etc.).

Select the appropriate System and Fuel Type, Priority and Condition from the drop downs.

Priorities cannot be duplicated, if there are multiple Heating Systems.

If the Heating System has been cleaned in the past 12 months, click the check box.

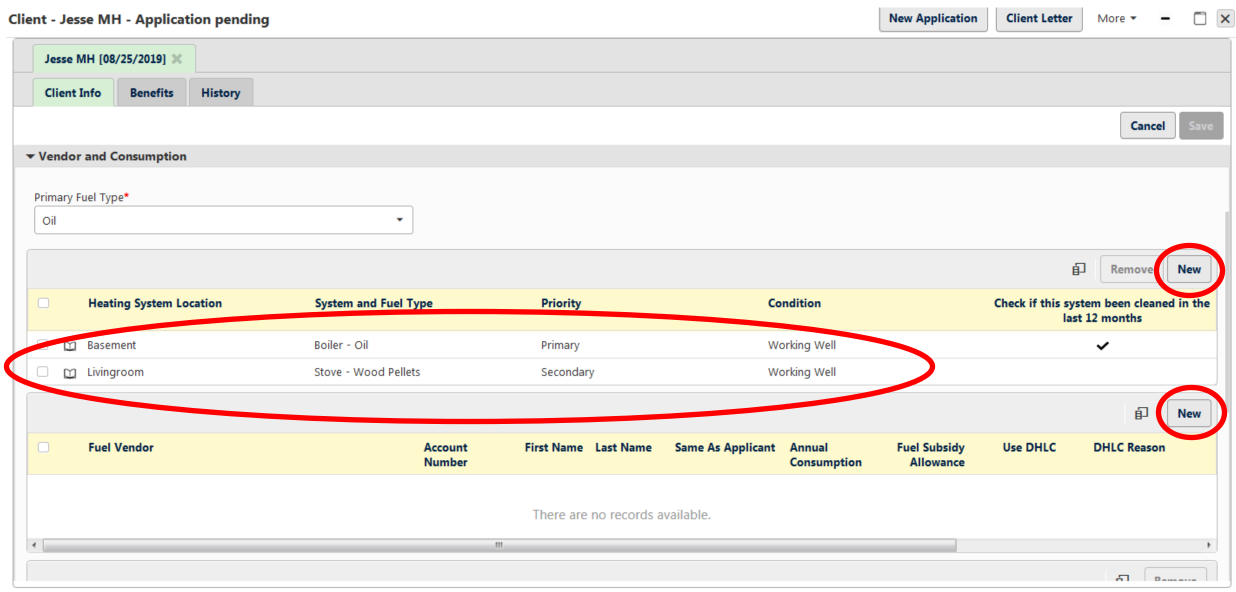
Once all fields are entered, click 'Save' to save the data and close the pop up box.



After the pop up box saves and closes, you will see the Heating System information in the Heating System grid.

Click 'New' to add additional Heating Systems. All permanently installed Heating Systems in the Dwelling must be entered.

The second grid in the Vendor and Consumption section is Fuel Vendors. To add a Fuel Vendor, click 'New'.



A Fuel Vendor (Energy Consumption) pop up box will appear.

Select the Fuel Vendor name with the corresponding fuel type in the first drop down field.

Enter the account number in the free text Account Number field.

Enter the First and Last Names listed on the account with the Vendor OR click 'Same as Applicant' to autofill the fields with the Primary Applicant's name.

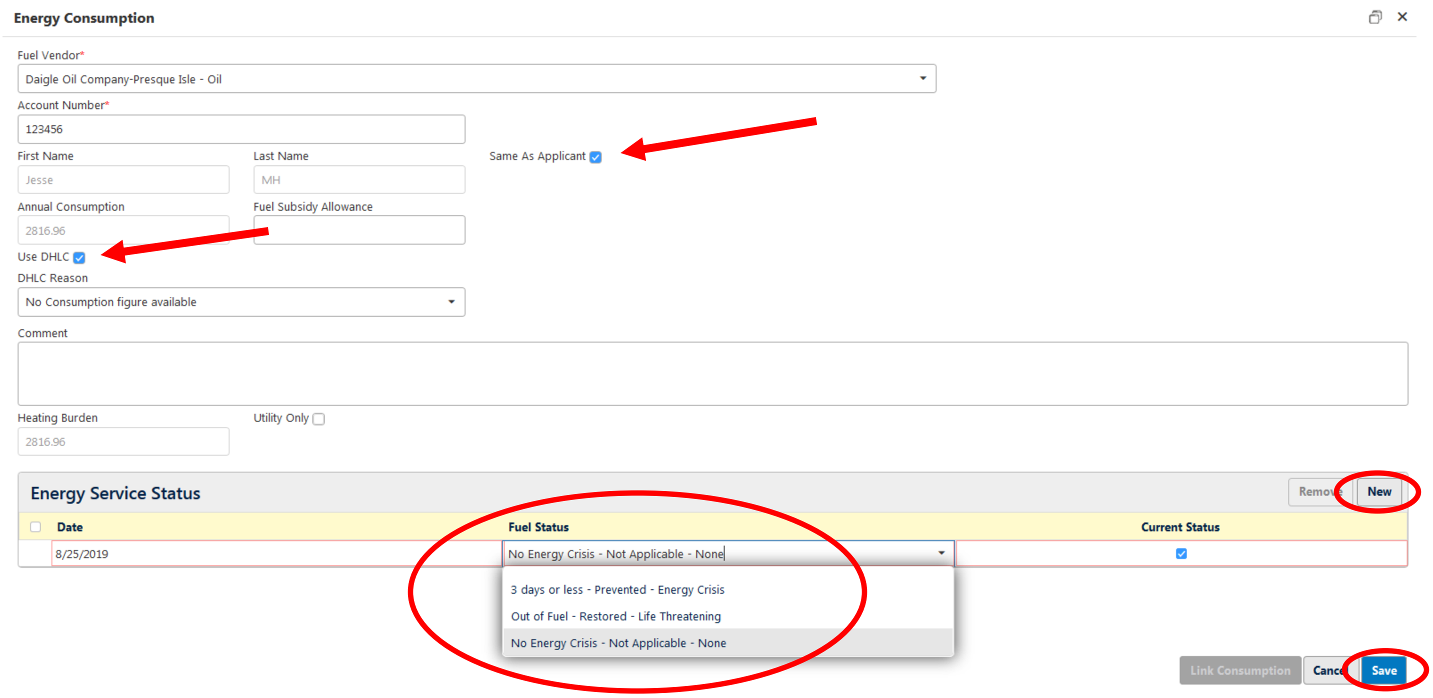
The Annual Consumption field is greyed out and is auto populated with the Households prior year consumption, if available. If for any reason the Household's benefit should be calculated using DHLC (Design Heat Load Calculation), check the 'Use DHLC' box and select the appropriate DHLC Reason from the drop down.

The Heating Burden field is greyed out and will be auto populated.

An 'Energy Service Status' grid is at the bottom of the Energy Consumption pop up box. This is a required field.

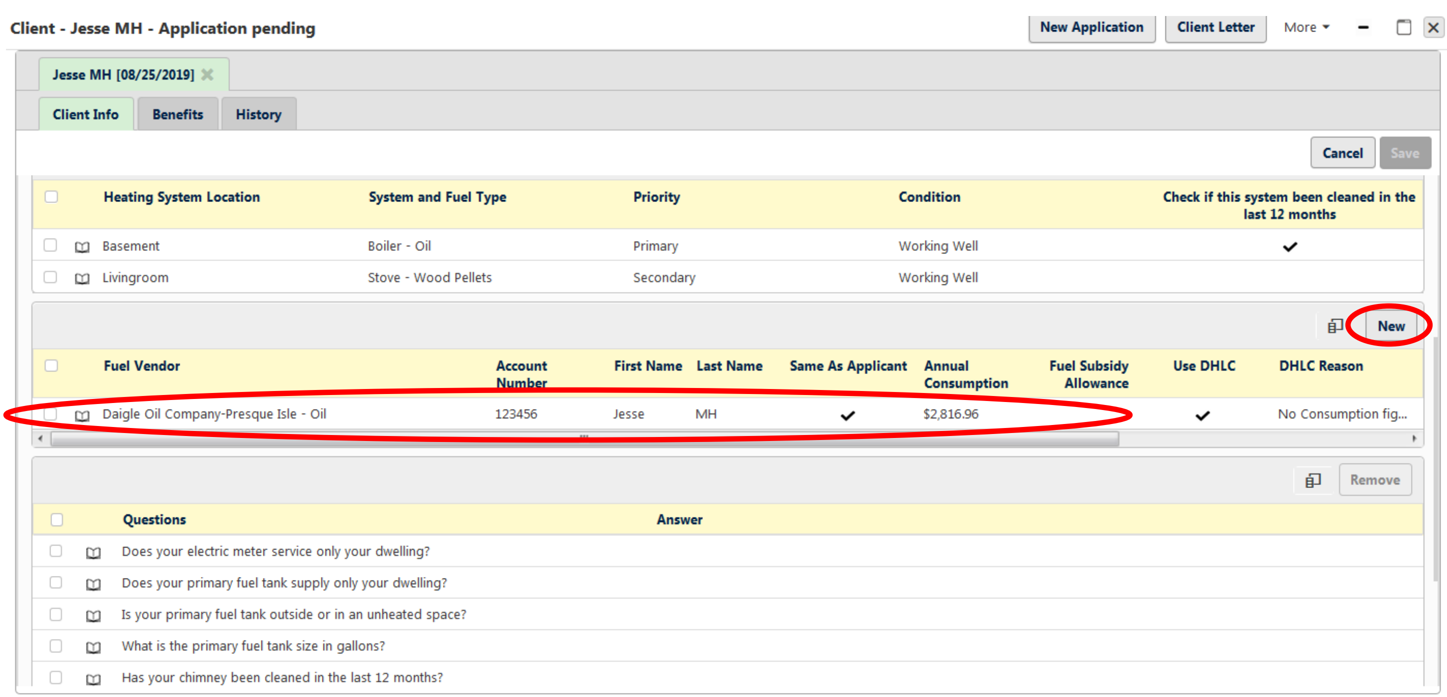
Click 'New' to enter an Energy Service Status. The date will be auto populated. Choose the appropriate Fuel Status from the drop down to indicate the Household's Energy Service Status as of the Date of Application.

Click 'Save' to save the data and close the pop up box.



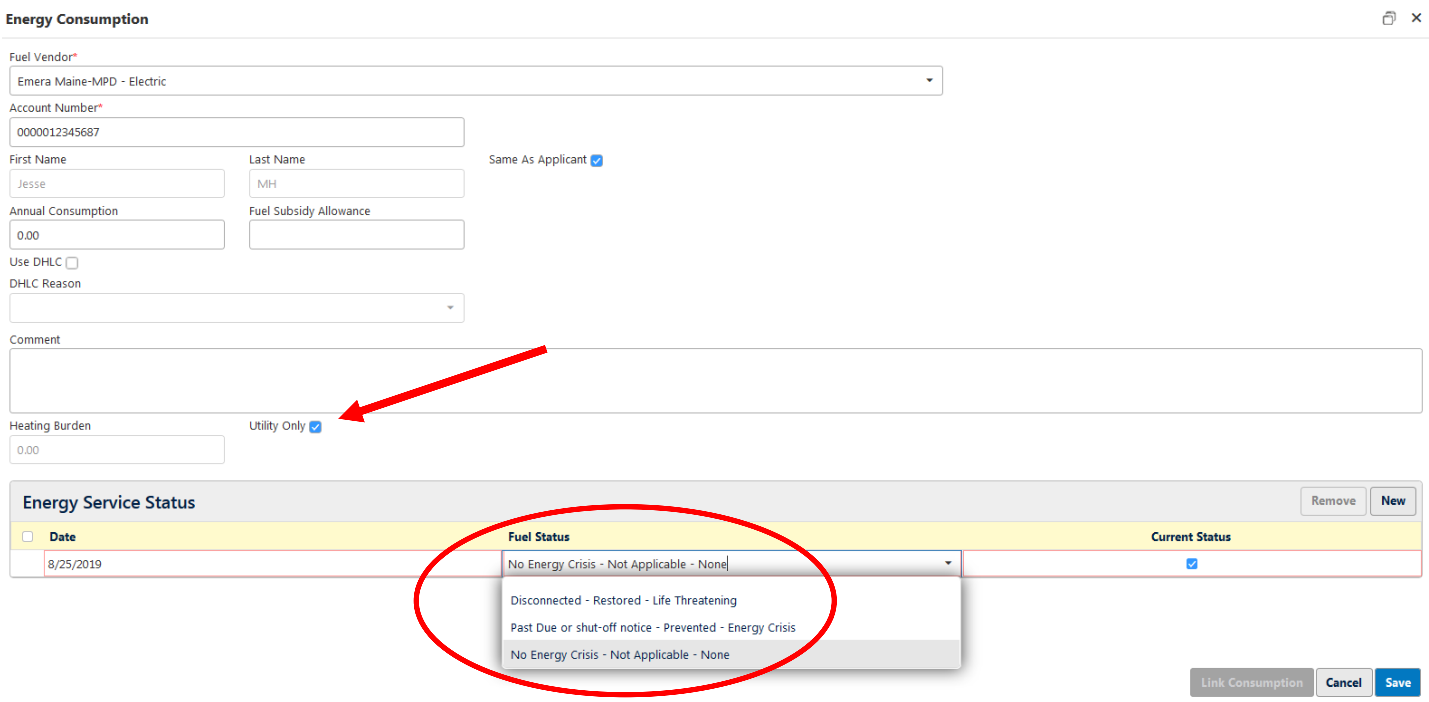
After the pop up box saves and closes, you will see the Fuel Vendor information in the Fuel Vendor grid.

Click 'New' to add additional Fuel Vendors, <u>including</u> the Household's electricity Vendor.



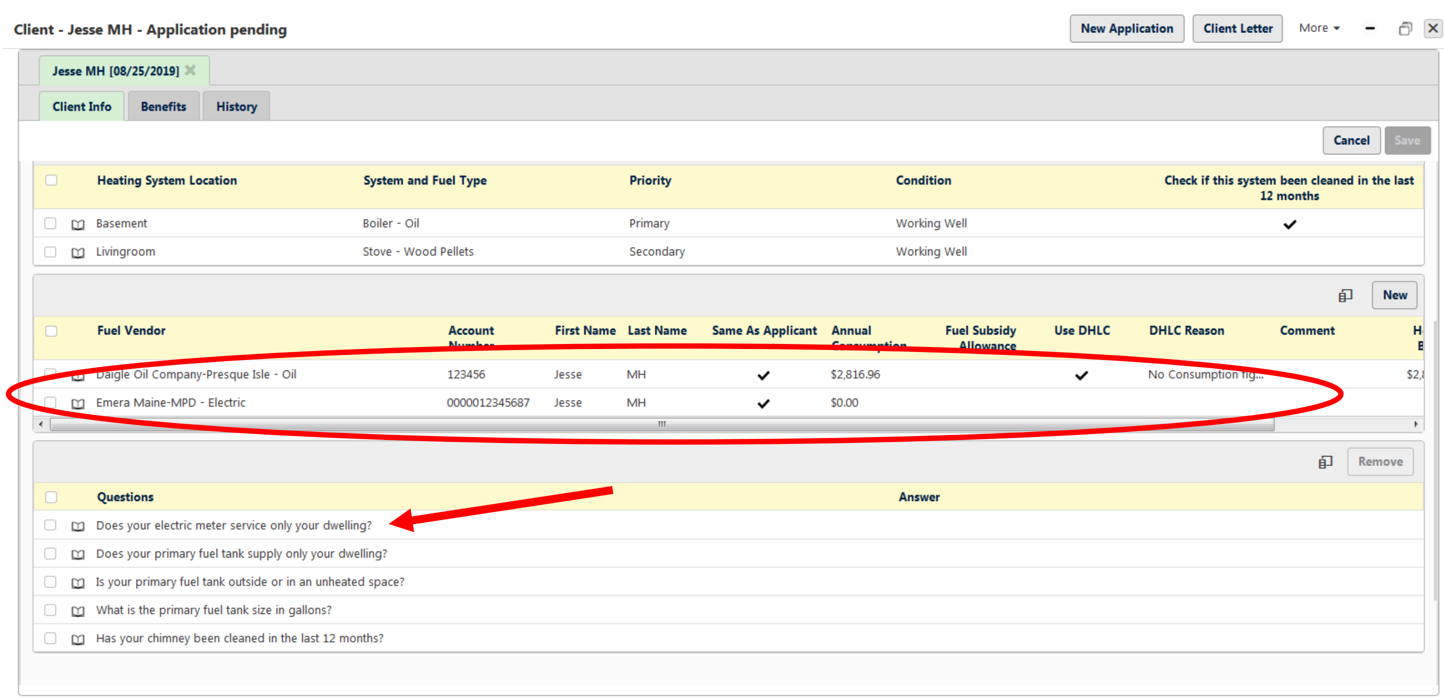
When entering the electricity Vendor, click the 'Utility Only' check box if the Vendor is used only for utilities.

The Energy Service Status must also be completed as of the Date of Application; however, the Fuel Status options refer to the electric status.



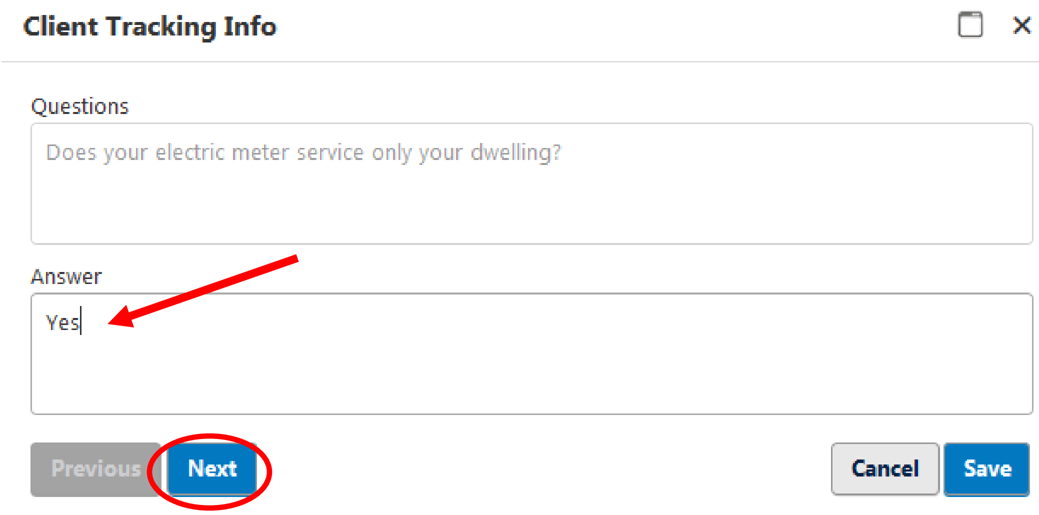
After the pop up box saves and closes, you will see the Fuel Vendor information in the Fuel Vendor grid.

The bottom section of the Vendor and Consumption section is Questions and Answers regarding the Household's Heating System. To begin the questions, double click directly on the first question.



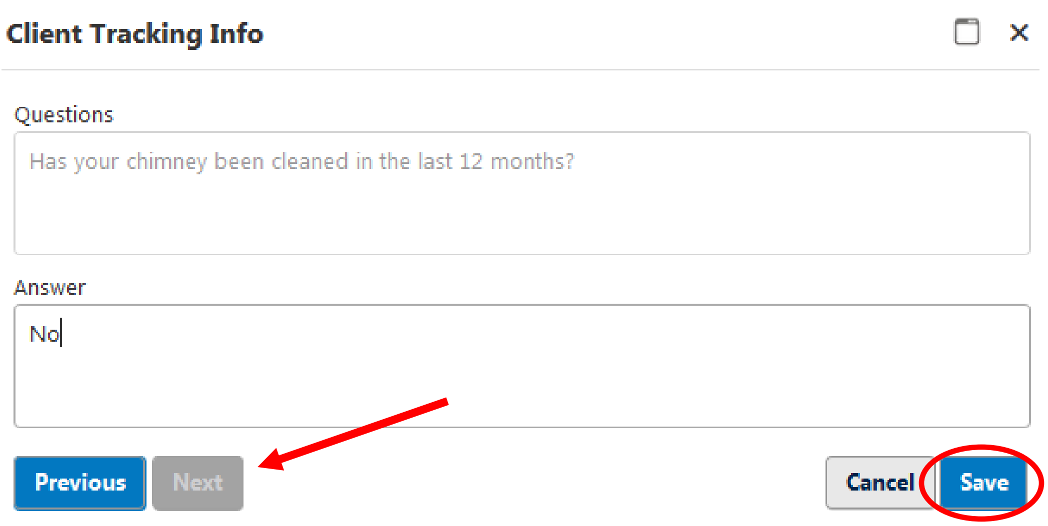
A pop up will appear labeled 'Client Tracking Info'. All questions must be answered by 'Yes', 'No', 'NA' or a numerical value unless answer options are otherwise specified in parenthesis.

Once a question has been answered, click 'Next' to move on to the next question.

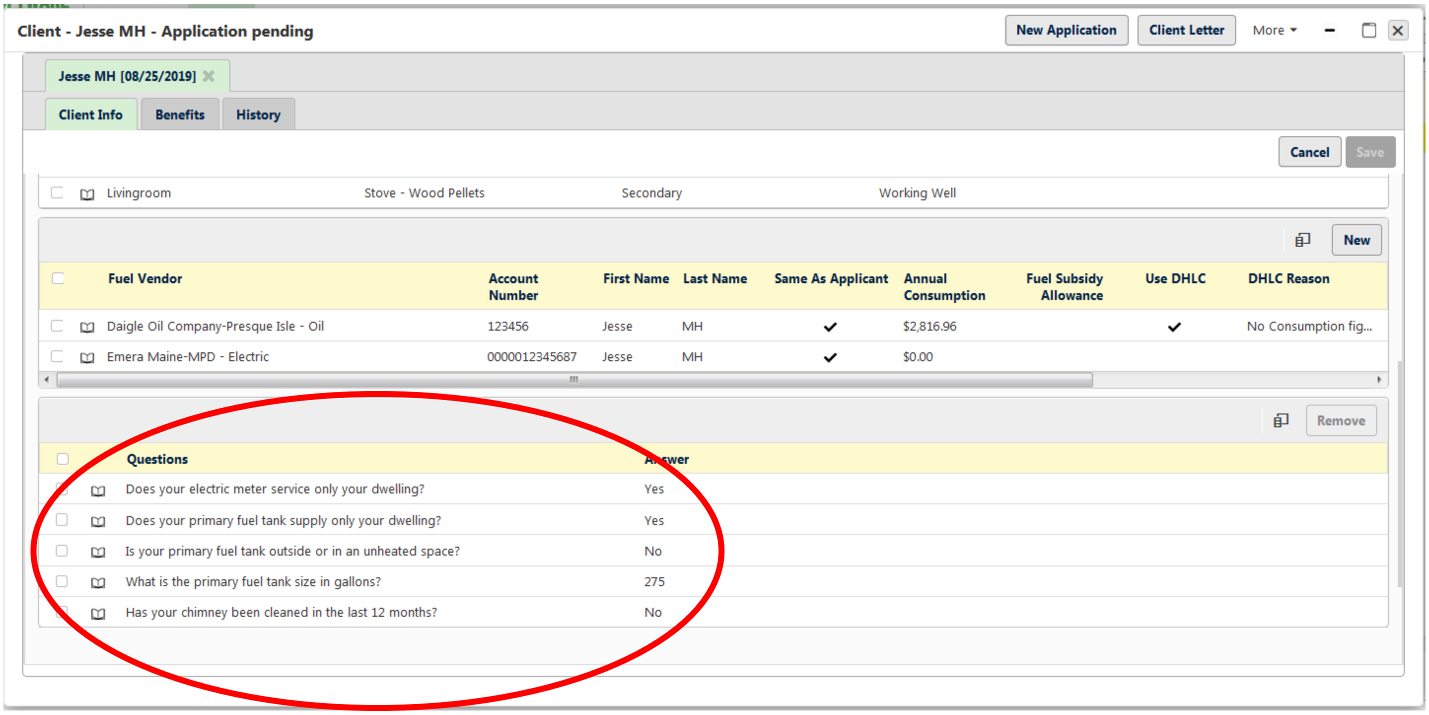


When the last question is reached, the 'Next' button will be greyed out.

Click 'Save' to save the data and close the pop up box.

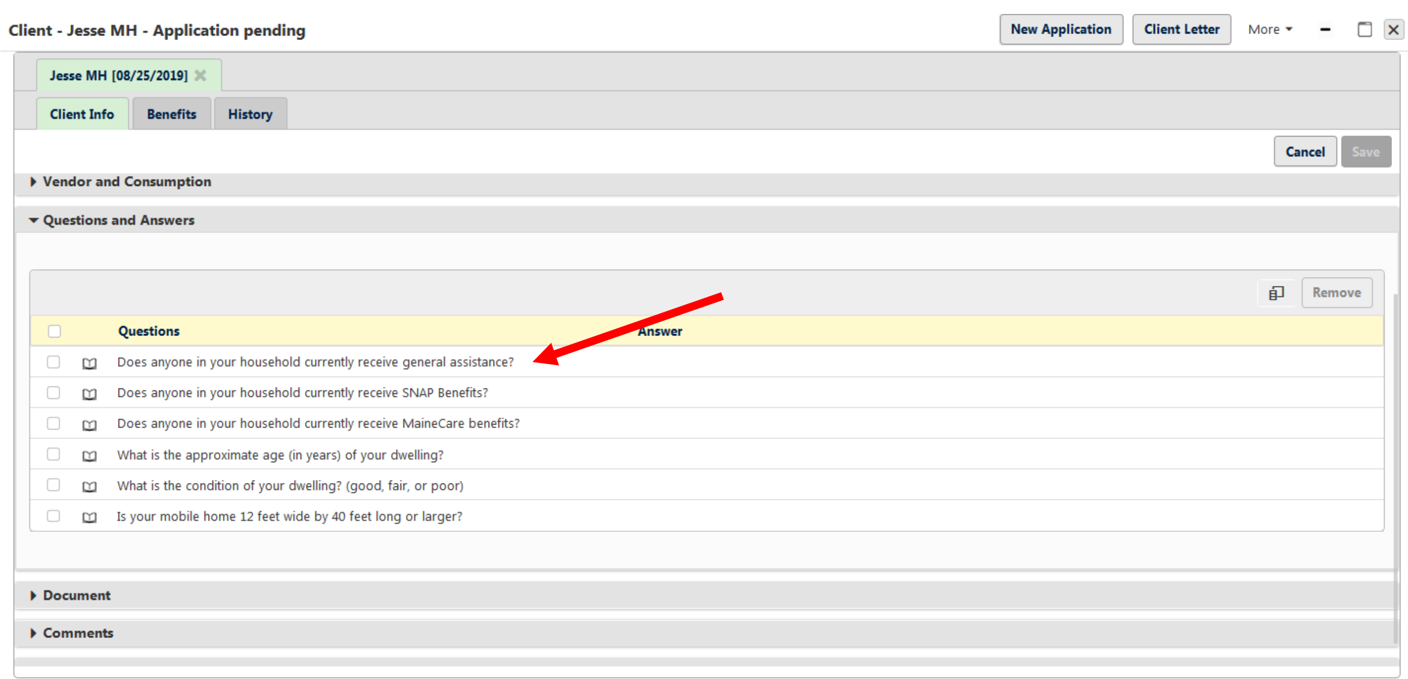


After the pop up box saves and closes, you will see the answers provided for each question in the Vendor and Consumption Questions and Answers grid.



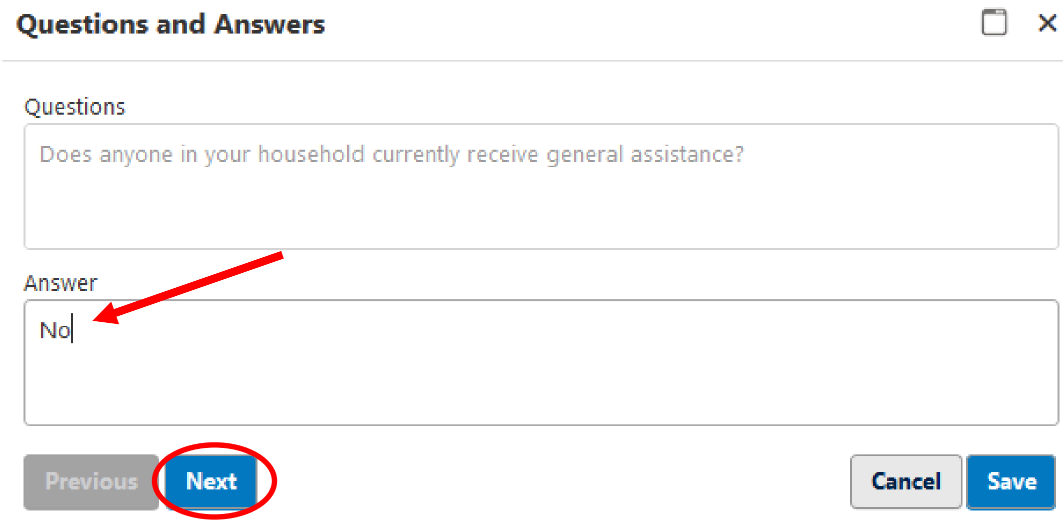
Next is the Questions and Answers section. This section is a mixture of questions in regards to the Households Dwelling and living situation.

To begin the questions, double click directly on the first question.



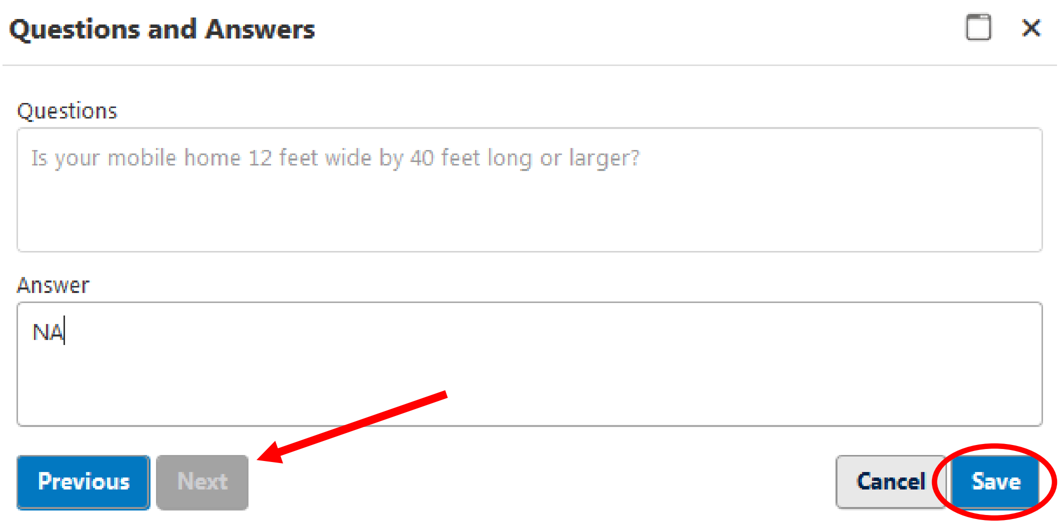
A pop up box will appear labeled 'Questions and Answers'. All questions must be answered by 'Yes', 'No', 'NA' or a numerical value unless answer options are otherwise specified in parenthesis.

Once a question has been answered, click 'Next' to move on to the next question.

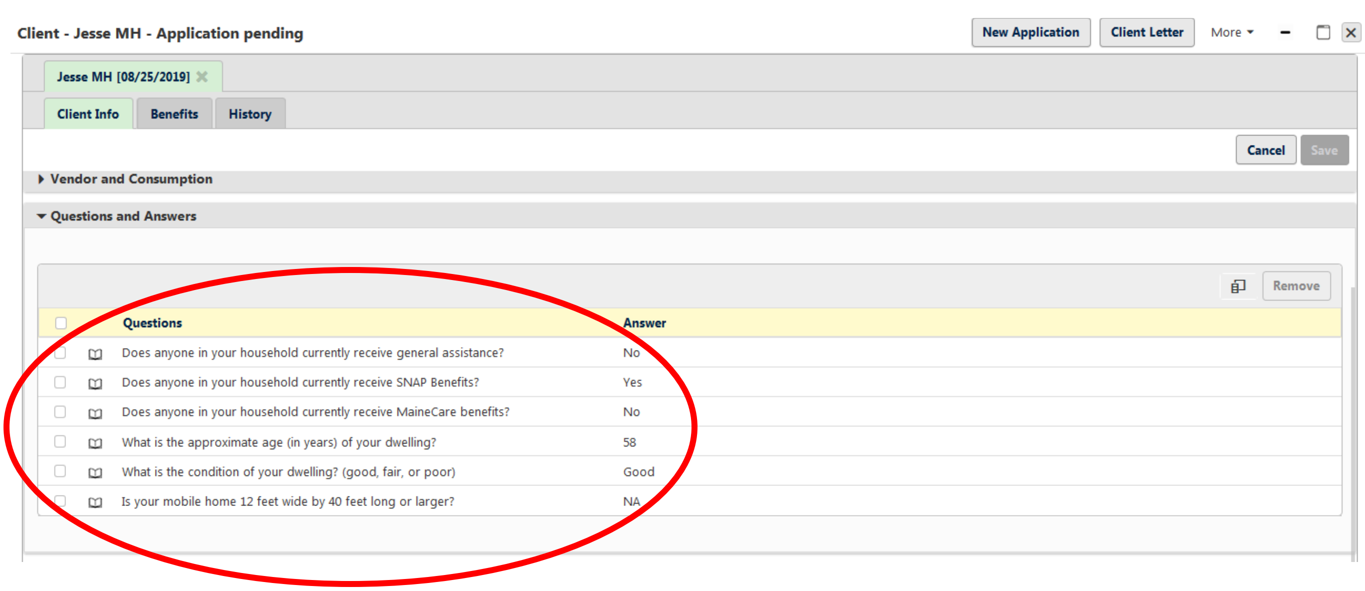


When the last question is reached, the ‘Next’ button will be greyed out.

Click ‘Save’ to save the data and close the pop up box.



After the pop up box saves and closes, you will see the answers provided for each question in the Questions and Answers section.

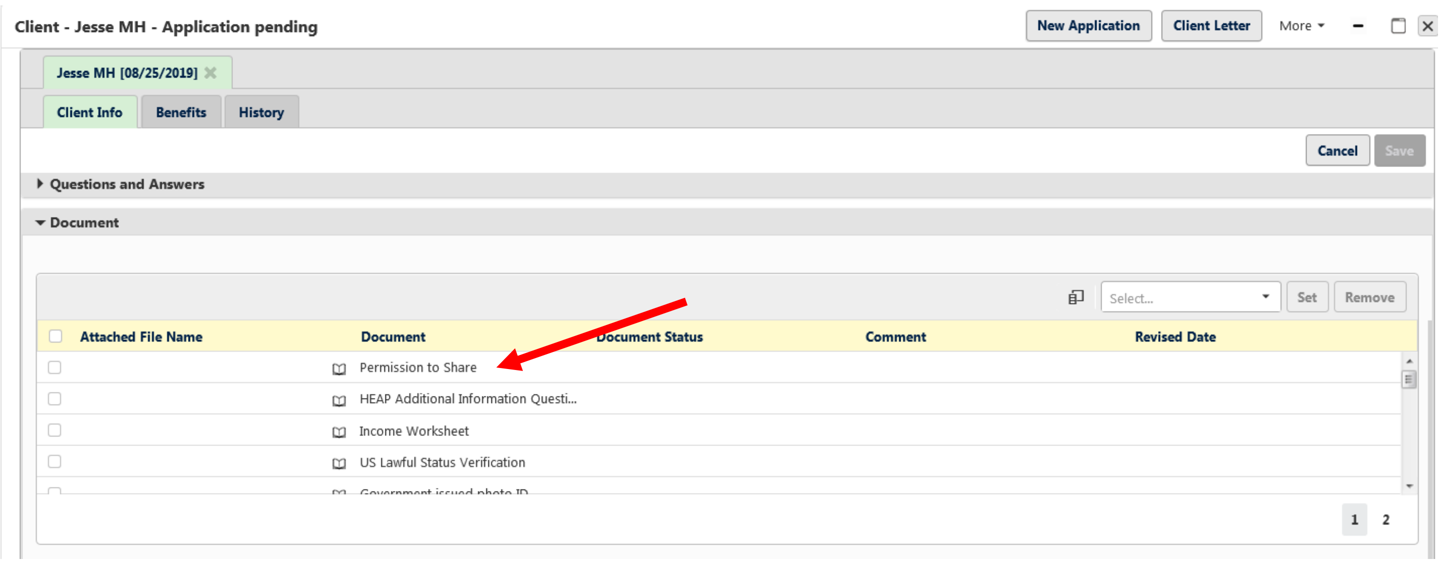


The Documents section is next.

All documents listed in the grid must have a Document Status (Completed, Not Required, Missing) listed in order to Qualify & Confirm (Certify) the application.

Some Documents must have a file attached in order to Qualify & Confirm (Certify) depending on the Application Ownership Types.

To update a Document Status or attach a file, double click on the Document name.

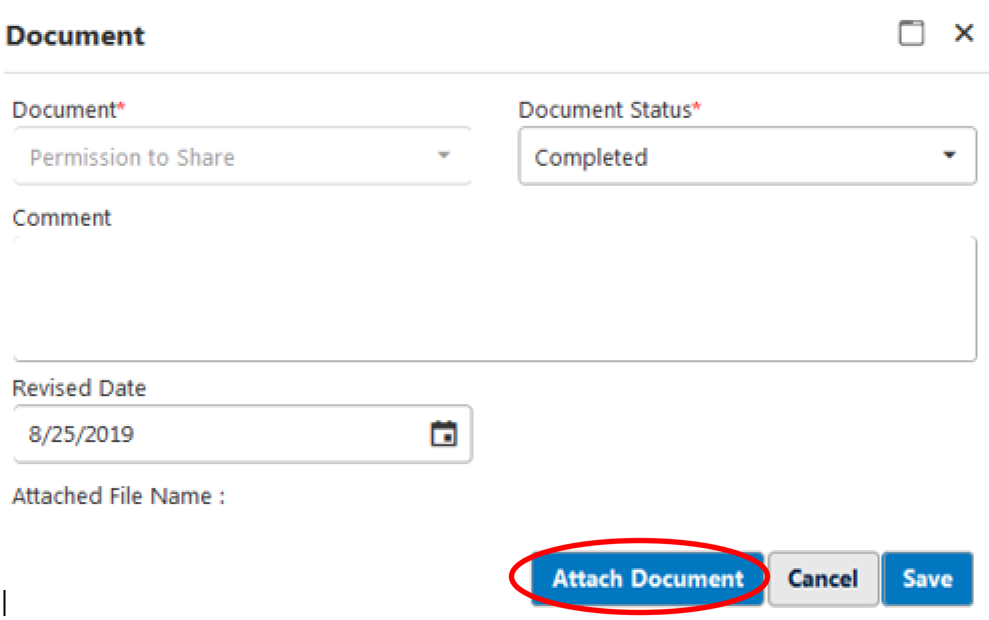


A pop up box will appear labeled 'Document'.

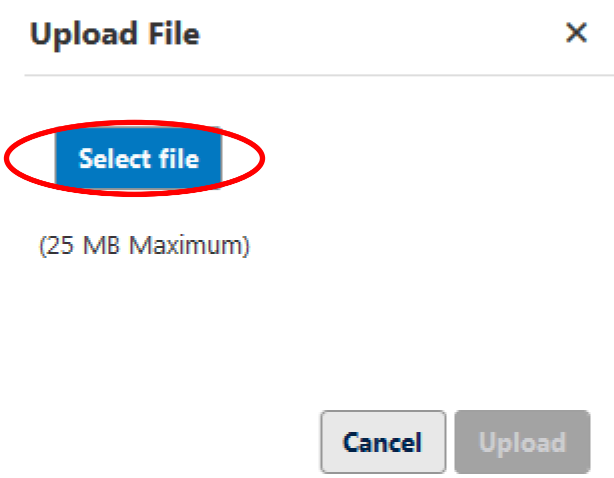
The Document name will auto populate depending on the Document type that you clicked on.

Select the Document Status from the drop downs. The Revised date will auto populate.

If a file will be attached, click 'Attach Document'.

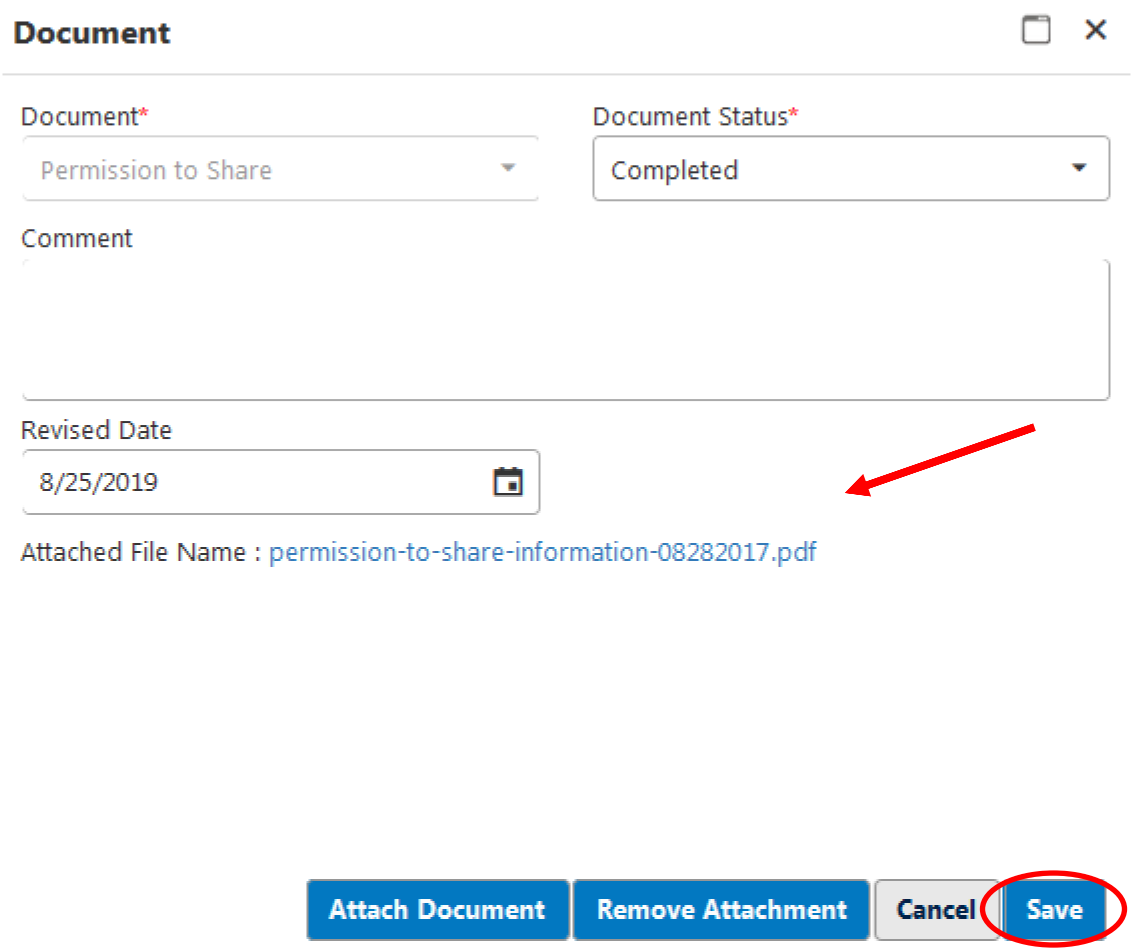


Click 'Select File' to choose the attachment from your computer.

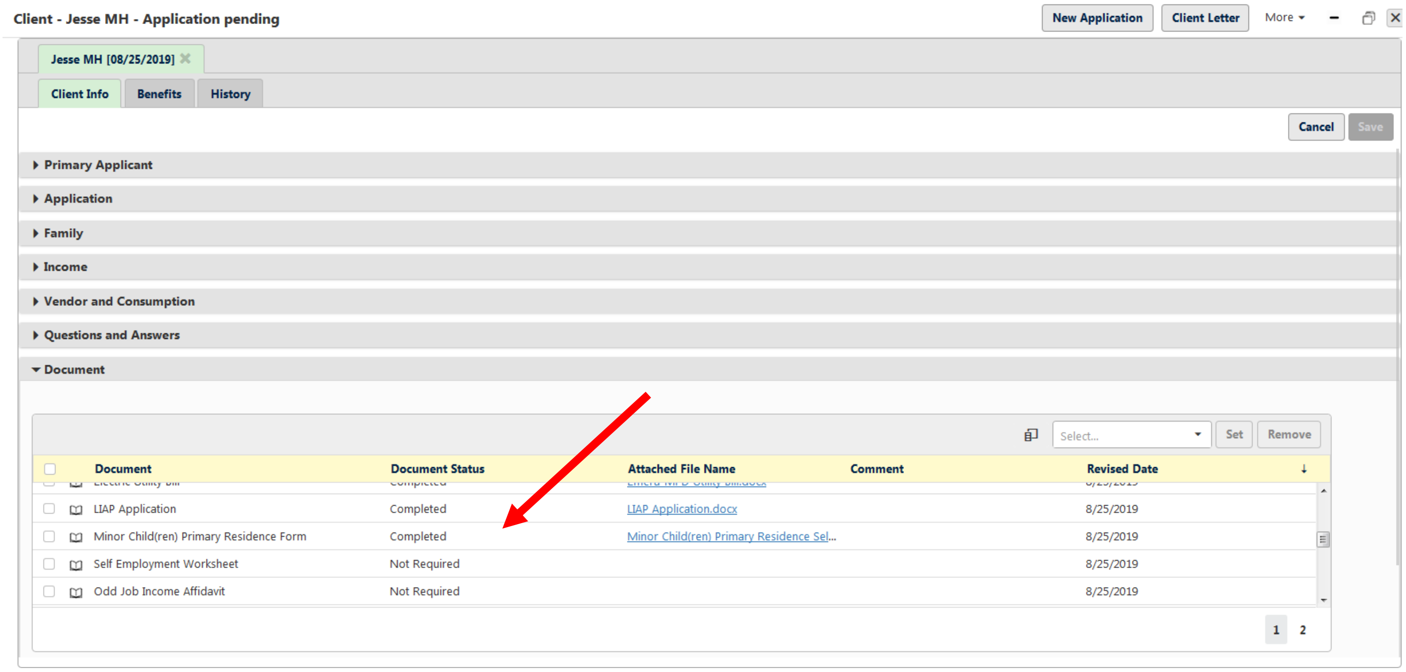


Once the file is attached, the 'Attached File Name' will appear below the Revised Date. .

Click 'Save' to save the data and close the pop up box.



Double click on each Document name to update the Document Status and attach files as necessary.
If any Documents are labeled as 'Missing', enter a comment with details.

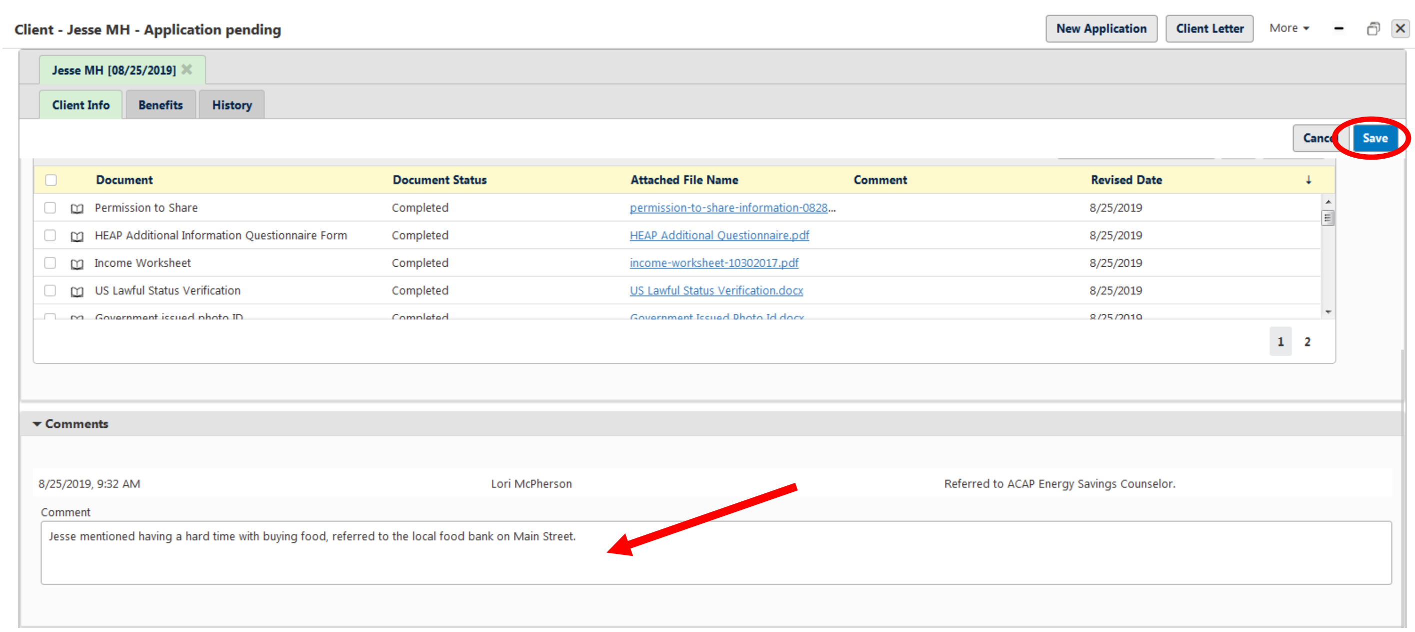


The final section to complete during the application process is the Comments section.

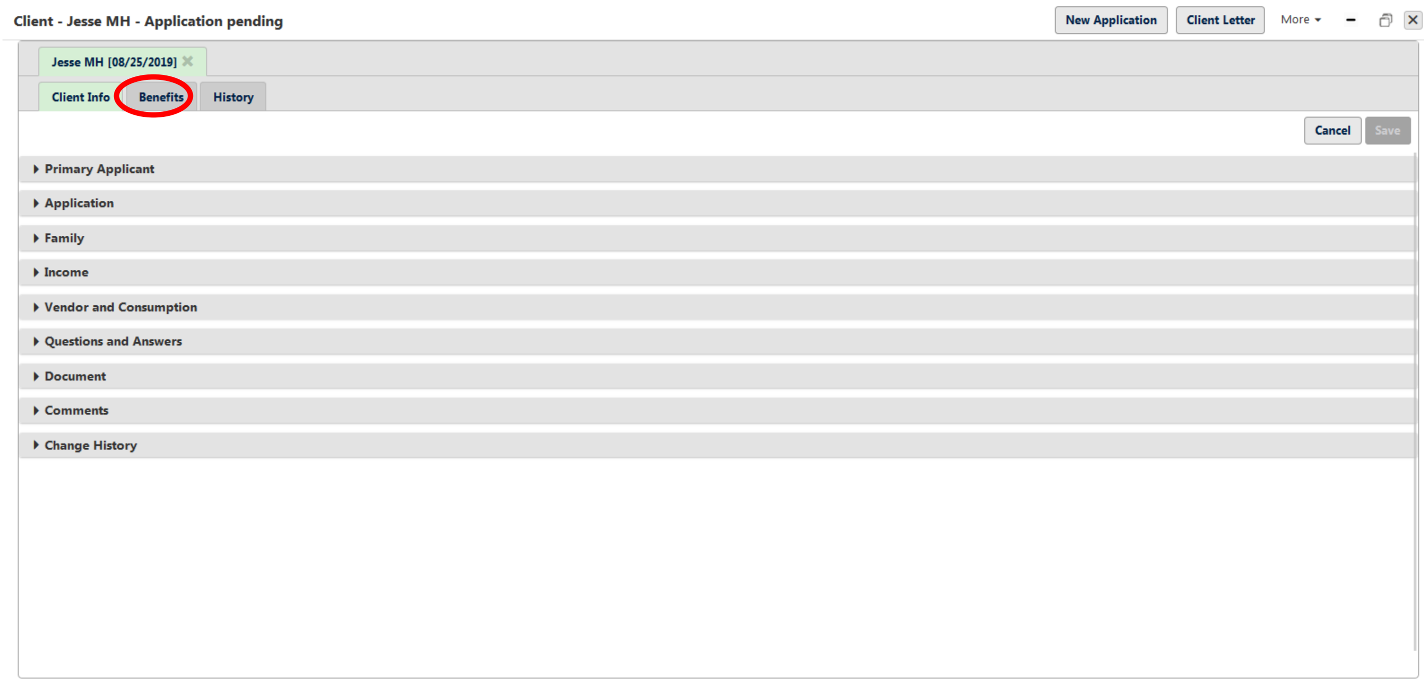
Any relevant information that is gathered and not entered into the HEAP Cloud application through other fields, should be entered as a comment.

To enter a comment, click in the Comment box and type the message.

Click 'Save' in the top right corner to save the data. The date, time and name of the person entering the comment will be auto populated.

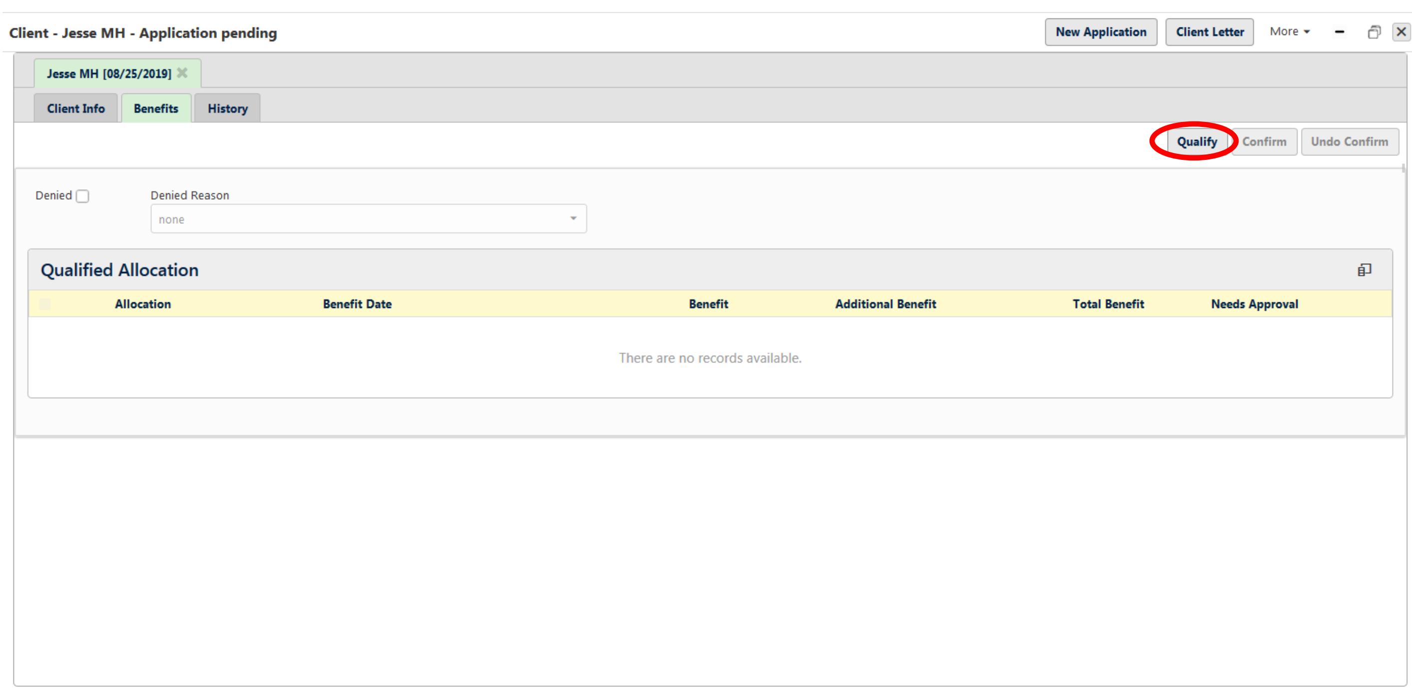


Once all eight (8) application sections have been completed, click on the 'Benefits' tab.



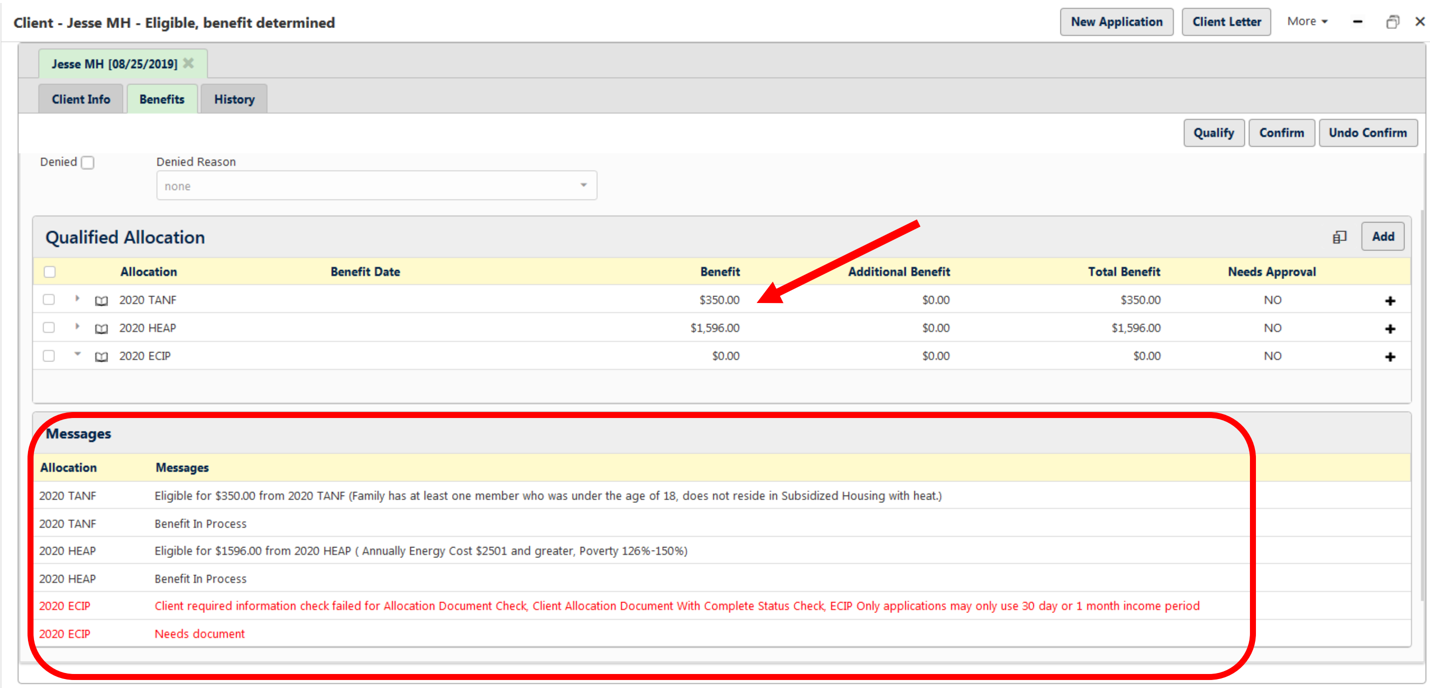
The Benefits tab includes all information in regards to Benefits eligibility and amounts.

In order to Qualify & Confirm (certify), click on the 'Qualify' button. This will run the Rules set up in HEAP Cloud to determine if the Household is eligible for HEAP, TANF Supplemental or ECIP Benefits.



Once the Qualify Rules have been run, Messages will appear in the Messages grid for each Allocation. The messages will either state that the Household is eligible for the allocation and the Benefit amount, that the Household is not eligible for the allocation OR what (if any) information is missing from the application in order to Qualify.

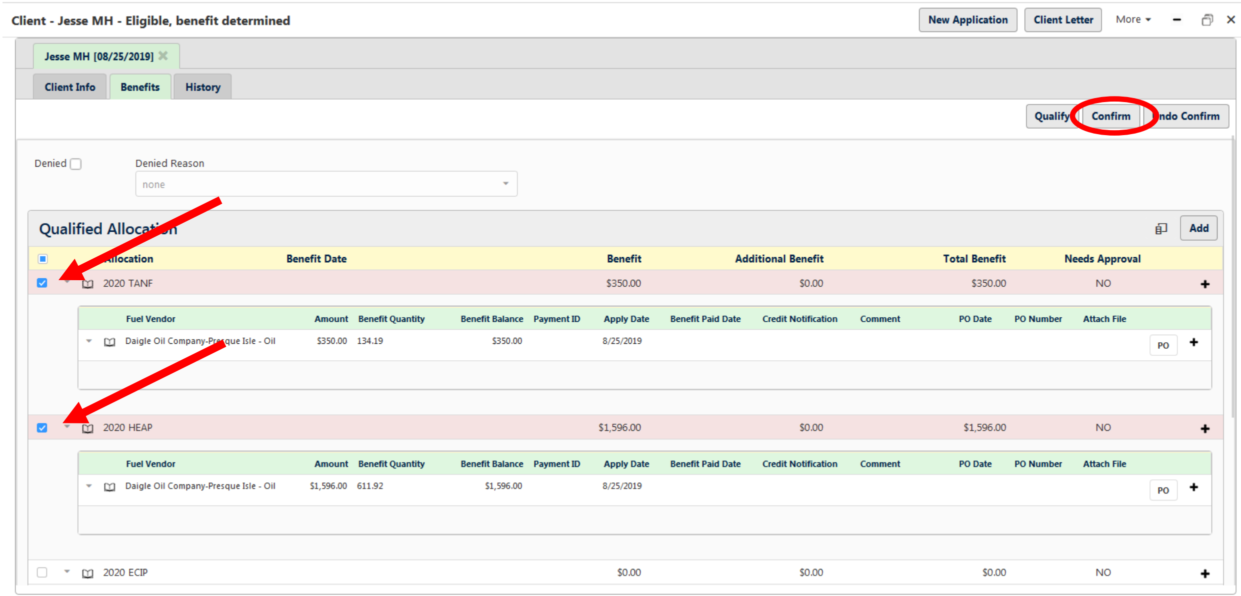
If the Household is eligible for a Benefit for an allocation, the Benefit amount will be listed in the Qualified Allocation grid. (Note: If the Benefit will be issued for the Secondary Fuel Type, see the document "How to Issue Benefits for a Secondary Fuel Type")



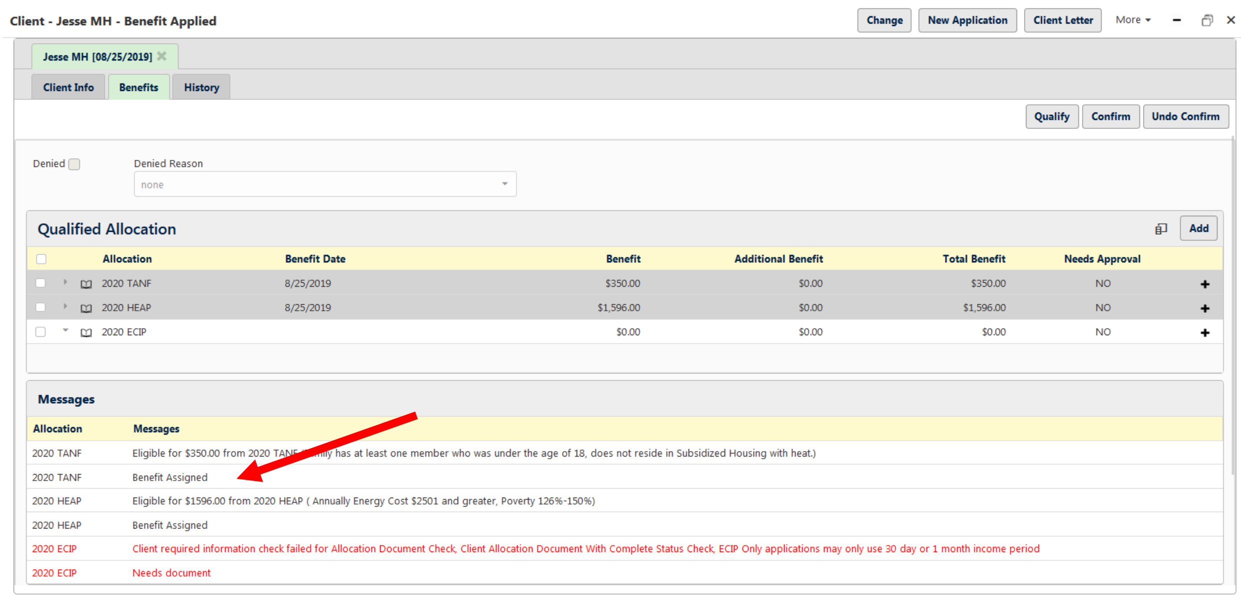
If the Messages indicate that there are documents or information missing, the items can be added to or corrected on the application. Once complete, the Qualify button can be clicked again to run the Rules.

If the Messages indicate that the Household is eligible for a benefit, the Qualified Allocations can be Confirmed. Note: The Confirm process must be done by someone other than the person who did the Intake, except in the case of $21.00 Heat & Eat Applications.

To Confirm, select the check boxes to the left of each Allocation that the Household is eligible for and then click 'Confirm'.



Once the Allocation(s) has been confirmed, the Message(s) will change from 'Benefit in Process' to 'Benefit Assigned'.



The application is now Qualified & Confirmed (Certified). The Benefit is ready to be issued by MaineHousing.