

HOW TO PUT APPLICANTS ON THE WEATHERIZATION WAIT LIST

In ECOS go to Households and then Household Select and search for the HEAP applicant you want to put on the WAP wait list.

Once you have the applicant click on Edit

Go to Application Instances in the left side menu

Click on Application Select in the left side menu

Click on New Application

Complete the fields that appear on the screen.

You have options of what you want to have ECOS bring over to the Weatherization application from HEAP. Click on what you want to be populated on the Weatherization application. You will want to use the data from the latest eligible HEAP application.

- Use Most Recent Application Summary Details
- Use Previous Application Income and Expense Records
- Use Previous Heating Cooling System Records
- Include Previous Energy Vendors
- Include Previous App Files

Click on Create Application

The Weatherization application has now been created and it will bring you to the Weatherization Application Summary page.

Complete any fields that are not already completed and click Save.

This will bring you to the Application Members page. Click on Edit for each member of the household and update accordingly. If there is a member of the home that is not here, you can add the member and complete the screen.

NOTE: In each Household member data screen there is a button to check if the member is Disabled. This controls whether or not one point will be given as one of our priorities. Regardless of how many members are disabled only one point will be given.

Note: If anyone in the household is over the age of 60 the Older Adult button will automatically be checked once you hit save. This also will provide one priority point regardless of how many older adults are in the home.

When Member screen is complete click Save

This will bring you to the Income screen.

All income should have been brought over from the HEAP application and if not, all household income will need to be entered.

When Income screen is complete click Save

This will bring you to the Energy Billing Data screen.

HEAP does not collect energy data. You will probably only see an electric vendor and the primary heat source vendor. The actual energy data for each energy source will need to be completed. If there are additional energy vendors, they will need to be entered along with the usage. All energy sources in the home must be entered.

NOTE: The data that goes into this screen will determine if a priority point is given for High Energy Use as well as Energy Burden.

When all energy vendors and usage have been added click on Continue.

This will bring you WAP Certification

Click Certify and then click on your name from the drop down under Certifier and then click on Certify as Eligible and then click on Finalize

The Weatherization application is now complete and the household will appear on the Weatherization Wait List with the priorities they qualify for.

To view the Weatherization Wait List go to the Home screen.

Click on Weatherization

Click on Wait List

To see more data about the Wait List click on Download Excel as there is more information about each applicant than what appears on the screen.

When an application is ready to be weatherized, click on Create Audit to start the weatherization process.