MERAC Assistance

User Manual

UPDATED: 4/24/2013

JAI Software
# Table of Contents

Introduction and Purpose .............................................................................................................. 4

Hardware and Software Requirements .......................................................................................... 5

What’s New in SR-13 ...................................................................................................................... 6

Intake and Data Entry ..................................................................................................................... 7
  Create New Application .................................................................................................................. 7
  Standard LIHEAP .......................................................................................................................... 7
  ECIP only .................................................................................................................................... 14

Input Data for Applicant(s) ............................................................................................................ 27
  Saving Current ............................................................................................................................... 27

Summary Tab .................................................................................................................................. 28

Household Member Tab ................................................................................................................ 30
  Add member(s) to household ......................................................................................................... 31
  Remove member(s) from household .............................................................................................. 33
  Change Primary Applicant ............................................................................................................ 34
  Add a contact number/e-mail ........................................................................................................ 36
  Delete a contact number/e-mail .................................................................................................... 37

Dwelling Tab ................................................................................................................................... 38
  Physical Address Change ............................................................................................................. 39

Heating Systems Tab ...................................................................................................................... 43
  Add a new or existing heating system .......................................................................................... 44
  Remove an existing heating system ............................................................................................... 46
  Re-Instate a retired heating system ............................................................................................... 47
  Add a new vendor .......................................................................................................................... 48
  Delete an existing vendor .............................................................................................................. 50

Income/Expense Tab ...................................................................................................................... 51
  Add Landlord ............................................................................................................................... 52
  Add a household member’s income .............................................................................................. 54
  Edit a household member’s income .............................................................................................. 64
  Delete a household member’s income .......................................................................................... 64

Right-Click Option .......................................................................................................................... 66
  Add a comment .......................................................................................................................... 67
  Delete a comment ......................................................................................................................... 68

Printing of Blank Forms ................................................................................................................. 70

Application History Tracking ......................................................................................................... 72

Open Existing Application .............................................................................................................. 73
  Benefit History ............................................................................................................................. 74

New from Current .......................................................................................................................... 75
Reporting
- Currently Selected Local Vendors ......................................................... 80
- Labels ........................................................................................................ 81
  - All Applications ..................................................................................... 82
  - “All Certified Eligible Apps by Town” through “Hypothermia Risk” ........ 83
- Lists .......................................................................................................... 84
- Year-To-Date Statistics Report ................................................................. 84

Certifier ......................................................................................................... 86
- Standard LIHEAP Certification ................................................................. 86
  - If Eligible ................................................................................................ 91
  - If Non-Eligible ....................................................................................... 93
- ECIP Certification ..................................................................................... 95
  - If Eligible ................................................................................................ 96
  - If Non-Eligible ....................................................................................... 98

Benefit Notification ....................................................................................... 99

Administration ............................................................................................. 102
- LIHEAP ...................................................................................................... 102
  - Re-Open Application ........................................................................... 102
  - Supplemental Follow-Up ..................................................................... 104
  - Void Current Application ..................................................................... 106
  - DHHS Import Follow-Up ...................................................................... 107
  - Export Ad Hoc Reporting Data ............................................................. 108
  - Maintenance of Third Parties ............................................................... 109
    - Employer ............................................................................................ 110
    - Add ...................................................................................................... 110
    - Edit ...................................................................................................... 110
    - Delete .................................................................................................. 111
    - Landlords and Intake Sites ............................................................... 112
  - Scheduler ............................................................................................... 112
    - Selection of Site and Setup Function .................................................. 113
    - Loading of Appointments after a Certain Date ................................. 116
    - Add Appointment ............................................................................. 117
    - Add Recurrence ............................................................................... 118
    - Attachment of Inquiry Information ................................................... 124
    - Delete Appointment ......................................................................... 128
    - Find Inquiry Appointment ................................................................. 129
    - Print Scheduler .................................................................................. 131
    - Refresh Option .................................................................................. 133
    - Change View of Scheduler ............................................................... 133
    - Holiday Management ...................................................................... 134

User Controls ............................................................................................... 135
- Change Password ..................................................................................... 135
Introduction and Purpose

In February 2003, JAI Software, Inc. (formerly Joseph Associates, Inc.) began the process of designing MERAC with the Microsoft .Net Framework as the runtime environment technology and Microsoft’s SQL Server as the database technology. This platform provides for excellent support from Microsoft Corporation and the numerous partners who are designing software that is compatible with this system. The choice gives the client the assurances of continued support from the world’s leading software provider. Building in the .NET Framework reduces the risk that the software platform will become obsolete, as Microsoft has committed the corporation to this .NET path with great success.

JAI Software, Inc. assembled a team of experienced computer systems designers and programmers with the appropriate skills to design and build the integrated system. The first major task was the development of the application shell designed to provide the security, communications, and relational database structure. This application shell was designed with the dual purpose of supporting the LIHEAP user interface and the Weatherization user interface. The system was deployed in July of 2005 and took intake for over 50,000 clients, making 108,000 payments in the first year.

The purpose of the MERAC system is to offer a custom programming service that integrates with MH’s existing systems, rather than a pre-packaged stand-alone product. Although the MERAC system was initially developed for MH, it can easily be adjusted for use in other governmental agencies nationwide due to its ability to interface with other database applications running on Microsoft’s SQL Server and other accounting applications.

Ultimately, the MERAC Assistance system supports a Client-Server environment that currently utilizes Citrix to publish the application to remote users. The system runs on either Windows 2000 Professional or Windows XP Professional and is written using Microsoft Visual Studio .Net 2005 (Visual Basic). The system is also using Infragistics (to provide additional user controls) and Raptier (to assist with the data-connection layer of the application).
Hardware and Software Requirements

The minimum requirements for the SQL Server are as follows:

- Dual processor 2.4GHz or greater
- 2 GB RAM
- 5 GB disk space for data
- Windows 2000 Server or greater
- SQL Server 2000 SP4 or greater

The specifications on the Citrix Server will depend greatly on the number of people that will add to the Citrix gateway. The estimate recommended for the MERAC software on the Citrix Server is 50Mb per user.
What’s New in SR-13

MERAC Assistance V2 SR-13 offers the following new feature:

DHHS Import Follow-Up

• Maintaining DHHS Import Errors
Intake and Data Entry

The following section will describe how the user sets up new applicants and how these applicants’ data can be adjusted based on new information relating to changes in criteria [i.e. change in income, change in address, change of number in household, etc.] The chapter will also describe how the user can perform reporting based on applicant(s) data via reporting.

Two methods: 1) Create New Application, or
   2) New from Current.

Create New Application

Standard LIHEAP

The first part that we are going to examine is the intake of a new applicant. The user is to left click menu File and select New Household Application.

This will open up a wizard that will guide the user through the creation of a new application.
“New Household Application” Wizard
The following wizard consists of four windows that will ask the user to input basic data about the new applicant.

Window 1
The user is in the first window encouraged to enter the required data as seen below.

NOTE: Date must fall into the timeframe specified in the red note seen at the right of the screen. Once the proper date has been entered, the red note will disappear.

Next, fill in the Application Type:
Type “S” for Standard LIHEAP or select from the drop down box.

Now, enter the “Intake Type” (type “N” for “New Paper App” or select “New Paper App” from the drop down box.)
Once all fields have been completed, click the **Next** button for the following screen to be displayed.

**Window 2**
The second window summons data about applicant’s dwelling type and address:

Again, the user is required to enter the requested data. Click the “Dwelling Type” drop down arrow and select a Dwelling Type. The user is here given the options between: Apartment, Condo, Co-Owned Duplex, Mobile Home, Single Family, Single Family Condo, or Unknown.
The latter option is used in case the applicant’s data is unavailable at the time, but needs to be filled in later in the process.

Next, left-click into the “Physical Address Line 1” box and enter the physical address for the dwelling.

**NOTE**: This has to be the ***dwelling address*** and **NOT** the mailing address!

Next, left-click into the “Physical Municipality” box and type the first letter of the town you are looking for. **OR** Left click the arrow to display list of Town names *(Example used: Hallowell)*

Once all required fields have been entered, either left-click on or tab to the button and press Enter.
Window 3
The third window summons data about the applicant’s personal data:

First, enter the applicant’s **full name.** [First and Last names are required!]

Then, select the applicant’s gender either by left-clicking the drop down list’s **arrow** and selecting gender, **OR** by typing “F” for female or “M” for male in drop down box.

Next, the “**Date of Birth**” must be entered to assure that the person is at least 18 years old.

Then, the “**Identification Type**” and “**Number**” needs to be entered, this is typically the applicant’s Social Security number; however, an Alien Number can also be used.

Lastly, the “**Household Member Since**” field must be entered.

**NOTE:** Date must be equal to or prior to the “Application Date”.
In the following can be seen an example applicant Ricky Hallowell, Male, DoB 01/01/1955, Soc. Sec. 001-11-1111, Household member since 01/10/1999:

Once all required fields have been entered, either left-click on or tab to the button and press Enter.
Window 4
In the last window for the wizard, the user is encouraged to either:

A) Confirm that the dwellings physical address is the same as the applicant’s mailing address by left-clicking check box, OR
B) Type in the applicant’s mailing address if different from the dwelling’s physical address by left-clicking in appropriate boxes.

Once all required fields have been entered, either left click on or tab to the button and press Enter.

CONGRATULATIONS: A “New Application” has now been created!
**ECIP only**

To open an ECIPonly application: Left click on menu File and then select New Household Application.

Next, left click on “Application Date” drop down box to input application date. Then, left click on “Application Type” and select **ECIPOly**.

Now, left click on the “Intake Type” drop down box to select Intake type.

Once all required fields have been entered, either left-click on or tab to the button and press Enter.
Now, left click on the “Dwelling Type” drop down box and select appropriate dwelling type for applicant.

Next, left click or tab to the “Physical Address” Line box and input applicant’s address.

Next, left click on the “Physical Municipality” drop down box and select appropriate municipality for applicant.

Once all required fields have been entered, either left-click on or tab to the button and press Enter.
Next, left click on the appropriate **name boxes** to input applicant’s full name.

Next, left click or tab to “**Gender**” drop down list and select applicant’s gender.

Next, left click or tab to “**Date of Birth**” drop down list and input applicant’s date of birth.

Next, left click or tab to “**Identification Type**” drop down list and select to use either applicant’s Alien number [if applicant is a legal alien] or social security number.

Next, left click or tab to “**Identification Number**” box and input appropriate number for applicant according to selection made in Identification Type.

Next, left click or tab to “**Household Member Since**” box and input appropriate date.

Once all required fields have been entered, either left-click on or tab to the **Next >** button and press Enter.
Next, if the applicant’s mailing address is the same as the address of the dwelling then left click the designated check box.

If the applicant’s mailing address is different than the address of the dwelling then left click the appropriate address boxes available.

Once all required fields have been entered, either left-click on or tab to the Finish button and press Enter.

When the wizard has been successfully completed, the user will be taken to the summary screen.

Next, complete tabs: Summary, Dwelling, Heating Systems, and Income/Expense as seen in Input Data for Applicant(s) section.
Next, left click on the “ECIP” tab to continue.

Next, left click on the button to start ECIP application.

Next, left click on the “Application Date” drop down box and input the date of application.

Next, left click or tab to the “Application Time” box and input time of application.
Next, left click or tab to the “Application Type” drop down box and select appropriate type of application.

If ECIP-A is chosen:

Next, left click or tab to the “Application Purpose” drop down list box and select appropriate purpose for application.
If ECIP-B is chosen:

Next, left click or tab to the “Application Purpose” drop down list box and select appropriate purpose for application.

To **complete adding** ECIP application left click or tab to **Add** button and hit Enter.

To **take no action**, left click or tab to **Cancel** button and hit Enter.

Once the adding of the ECIP application is complete, the application will show up in the ECIP Applications section as can be seen in the above example.
Next, left click on “Benefit Amount” box to input benefit amount needed for applicant.

Next, left click or tab to ECIP Certifier drop down list box and select name of Certifier

Next, complete the appropriate section for application.

If user chose **purpose Fuel** (1):

If user chose **purpose Utility Disconnect** (2):

If user chose **purpose Furnace Repair** (3):

**NOTE:** Amount available for an “ECIP-A” application is $300, and The amount available for an “ECIP-B” application is $2,500.
1. Fuel

Left click on “Last Delivery Primary” to input Last Delivery date to primary heating system.

Next, left click or tab to Units Delivered box and input the amount of gallons delivered at last delivery to primary heating system.

Next, left click or tab to Price per Unit box and input the appropriate amount.

Next, if applicable indicate Last Delivery for Secondary heating system by left clicking or tabbing to appropriate box.

Next, if Secondary Heating is present and functional left click Secondary Can Heat check box.

Next, left click or tab to Energy Vendor drop down list and select appropriate vendor.
Once the appropriate Energy Vendor has been selected, the “Fuel Type” will **automatically show up** either in the Fuel Type Box or in the Wood Type Box depending on primary heating system.

<table>
<thead>
<tr>
<th>Fuel Emergency</th>
<th></th>
<th></th>
<th></th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Last Delivery Primary</td>
<td>11/01/2006</td>
<td></td>
<td>Fill-up</td>
<td></td>
</tr>
<tr>
<td>Units Delivered</td>
<td>100</td>
<td></td>
<td>Days of Fuel Left</td>
<td></td>
</tr>
<tr>
<td>Price Per Unit</td>
<td>$2.395</td>
<td></td>
<td>Fuel Left</td>
<td></td>
</tr>
<tr>
<td>Last Delivery Secondary</td>
<td></td>
<td></td>
<td>Secondary Can Heat</td>
<td></td>
</tr>
<tr>
<td>Energy Vendor</td>
<td>Augusta Fuel Company - Oil</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Fuel Type</td>
<td>Oil</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Wood Type</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>ECIP Purchase Units</td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Delivery Charge</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>LIHEAP Credit Available</td>
<td>$0.00</td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

Next, if applicable, enter in the appropriate “ECIP Purchase Units”, “Delivery Charge”, and “LIHEAP Credit Available”.

To complete the ECIP application: see [ECIP Certification](#).
2. Utility Disconnect

Left click on “Utility Vendor” to select applicant’s vendor:

Next, left click or tab to “Utility Contact Name” and input appropriate name:

Next, left click or tab to “Disconnect Date” to enter disconnect date informed by Utility vendor.

Next, left click or tab to “Disconnect Amount” to enter amount reported by Utility vendor.
Next, left click or tab to the appropriate check boxes to indicate whether:

- "Heating will fail"
- "ECIP will remedy"
- "Broken Payment Arrangements"

To complete the ECIP application: see ECIP Certification.
3. Furnace Repair

Left click on “System Vendor” drop down list box to select appropriate vendor.

Next, left click on appropriate check boxes:

To complete the ECIP application: see ECIP Certification.
**Input Data for Applicant(s)**

In the following sections, the input data for applicant will be discussed based on the following tabs shown: [These can be seen on the bottom part of the screen]

---

**Saving Current**

Before we start looking at the individual tabs, it is important for the user to learn how to save entered data at any time during intake. While working on any tab, the user has the ability to save current information by following procedure:

**File/Save Current**
Summary Tab
The first tab which we are going to examine is the summary tab which provides the user with a brief overview of the application.

The summary tab consists of three grouped boxes:

1) “Application and contact info” group, state:

   On the LEFT side:
   Date application was submitted
   Type of application [Standard LIHEAP or ECIP]
   Status of Application [Pending or Eligible]
   Name of intake worker
   CAP Agency handling case [example: KVCAP]

   On the RIGHT side:
   MERAC Application ID#
   Telephone information for applicant
   With the ability to add or delete new role of contact
   Hereunder: Home- and Message telephone no. with FROM and TO
dates to specify during what dates applicant can be reached.
2) “Number of Household Members who are” group, state:

On the LEFT side:
Gives following overview of household member:
Native American In Household Elderly
Disabled Under Age 2

On the RIGHT side:
Hypothermia Risk box is checked automatically when “Under Age 2”, “Elderly” and/or if persons who are listed as part of household has a physicians note [as specified under the “Household Members Tab!”]

The information gathered in this section can only be changed under the “Household Members Tab!”

3) “At least one person in the household is receiving” group, states:

If any member of household is receiving:
**Food Stamps, General Assistance, Medicaid, or Other**

This is used to indicate if at least one person in the household is receiving state aid.
Household Member Tab
The household member tab allows the user to add further members to household and hereunder be able to list whether a hypothermia risk exists or not, determined by member being 1) Native American over age of 55, 2) Over age of 65, or 3) Physician’s note.

The household members tab is grouped into five sections:
1) Gives the user the ability to I) **Add member(s) to household**, II) **Remove member(s) from household**, and III) **Change Primary Applicant**.

### Add member(s) to household

I) To add member to household, the user will left click on the **Add** button seen on top of “**household member**” box.

Once the **Add** button has been clicked, the user will see the “**Add Household Member**” wizard appearing in form of a new window.

First, the user has to specify whether the newly added household member is to be added as a former household member or as a new one.

**General guide:**

**YES**  Former members of household **EXIST** and is to be added

**NO**   New member of household is to be added

Next, the user is encouraged to type in the new household member’s First-, Last name, Suffix and Middle name [if any], Date of Birth, Gender, and identification number [typically social security number].
Once all required fields have been entered, either left-click on or tab to the **Next >** button and press Enter.

Next, the user has to state the beginning date of added member to household. This information is used when calculating application’s benefits.

Once all required fields have been entered, either left-click on or tab to the **Finish** button and press Enter.

This will bring the user back to the household member screen with the new household member added.

The newly added information in the wizard will show up in the general information group box.
Remove member(s) from household

II) To remove a member from the household, the user will first highlight the household member, by left-clicking to the left of the household member’s name, and then left-clicking on the **Remove** button.

Once the **Remove** button has been clicked, the “Remove Household Member” screen will appear:

**NOTE:** The permanent removal of a household member should only be done, if the household member was added in error. In ALL other cases, household members must be retired.

To retire a household member, first set appropriate Through Date, then left click the **Retire** button.

To permanently remove a household member, left click on the **Delete** button.

To take no action, left click on **Cancel** button.
Change Primary Applicant

III) To change primary applicant, the user will first **highlight** the household member to be set as primary applicant by left-clicking the "Primary Applicant" check-box.
2) The user now has the ability to select and add further information about applicant(s) by first **highlighting** household member.

The user can now, based on selected household member, change name, date of birth, and/or gender in case of mistyping during intake.

**NOTE:** Once application has been certified these fields will be locked!

3) The user can also, based on the selected household member, add information about member:

- **Marital Status, ID Type, ID Number, and Health Insurance and Education Level** via drop down boxes
- **Citizen, Native American, Physician’s Note, Disabled** via check boxes
4) Lastly, the user has the ability to **Add** a contact number or **Delete a contact number** of every household member listed.

**Add a contact number/e-mail**

To add a contact number, first **highlight** household member and then left click on **Add** button:

Once **Add** button has been chosen, left-click on **drop down list’s arrow** to choose type of “Contact Role”; the user has the choice between:

**Business Telephone, Cell Phone, or Fax Line.**

Once the “Contact Role” has been chosen, left click “From” box to enter the start date from when contact role can be reached at selected number; the user can also enter an end date in the “To” box. The “From” and “To” dates are typically used together to deactivate an existing number.
Lastly, the user needs to enter the appropriate number selected for household member. This is done by left-click the “Number” box and then entering the number.

To **ADD ANOTHER** contact number for addition household members follow the same procedure.

To **ADD AN E-MAIL ADDRESS**, follow the same procedure.

**Delete a contact number/e-mail**

To delete a contact number, first **highlight** the household member:

Next, left click on the **Delete** button:

**NOTE**: A telephone record should only be deleted if it was entered in error!

Once the **Delete** button has been clicked, left-click on the **Yes** button to confirm that number was entered in error.

To take no action, left click the **No** button.

To **DELETE an E-Mail address**, follow the same procedure.
**Dwelling Tab**

The dwelling tab is used to further specify an applicant’s dwelling information. As can be seen from the screenshot below, the dwelling tab consists of two grouped sections: **Location** and **Dwelling Information**.

**Location group** [seen on top part]:

Shows the applicant’s

1) **Physical address** on the **LEFT** [as determined through the new application wizard]

**NOTE**: The physical address can be changed by clicking the button. This functionality is only available to users’ with EHS admin role assigned. See **Physical Address Change** section on next page for further instructions.
2) **Delivery address** on the **RIGHT** [optional entry: used if delivery address is different than physical address]

**NOTE:** Specific delivery instructions for the fuel vendor (i.e. directions to dwelling or storage unit) can be entered by clicking the **Delivery Instructions** button.

---

**Physical Address Change**

To change the physical address, first click the **Change** button and then type fill in the next physical address:

![Physical Address Change Dialog Box](image)

**NOTE:** A reason for the address change is required before the physical address can be changed.
Dwelling Information group [seen on bottom part]:

On the LEFT side, the user has the ability to set:

1) Ownership Type: Drop down box which allows user to choose from:
   Own, Rent, Rent with Heat, Room/Board,
   Subsidized, or Subsidized with Heat.

   The latter two automatically sets max benefit for applicant to $5.00. The others are used in conjunction with the income tab to determine amount of benefit available for applicant(s).

2) Dwelling Type: Drop down box which allows user to choose from:
   Apartment*, Condo, Co-Owned Duplex, Mobile Home**, Single Family, Single Family Condo, or Unknown***.

   *If Apartment type is selected, the user has further to fill in:
   Number of Apartments

[Diagram of Dwelling Information form]
If Mobile Home is selected, the user has to further fill in: **Mobil Home Size, Mobile Home Addition Size** [if applicable], and **click checkbox** if Mobile Home was manufactured Pre to 1976.

***Unknown is used if dwelling type is unknown during intake; however, this must be filled in before application can be certificated and processed for payment.

3) **Dwelling Age**: User is to type in dwelling’s age.

4) **Dwelling Condition**: Drop down box which allows user to choose from: **Good, Fair, or Poor**.

5) **Square Footage Space**: User is to type in dwelling’s size in square footage, if known. If box is left empty: **Mobile Home**: Assumed 12’ x 60’ in total size  
**All other**: Listed by the intake worker if available.
On the **RIGHT** side, the user has the ability to enter:

1) “Amount of Rooms” based on list
   
   **Living Rooms, Bedrooms, Dining Rooms, Kitchens, Other Rooms**
   
   *If “Other Rooms” box contains a number, then a description must be typed in the box below.

2) “Total Rooms” box on top cannot be edited by user but is **updated automatically** as list of rooms is completed.

3) “Date of Weatherization” is entered if applicable.

4) Dwelling’s insulation of:
   
   **Walls, Attic, and Water Heater** are populated via drop down boxes.
   
   User can choose between following options:
   
   N/A, No, Unknown, or Yes

5) Lastly, “Water Heater Fuel” is selected via drop down box.
   
   User can choose between following options:
   
   Coal, Electric, Kerosene, LP Gas, Natural Gas, Oil, Other, or Wood.
Heating Systems Tab

The heating systems tab is used to specify the heating source for the applicant(s). The screen consists of three grouped boxes:

1) Utility information
2) Heating Systems, and
3) Fuel Vendors
1) “Utility information”: The user is encouraged to check applicable checkboxes based on applicant’s information during intake.

The user has the following options available to checkmark:

- **All Utilities Included**
- **Electricity Included**
- **Has Electric Account**
- **Own Electric Meter**
- **Has Energy Cost**
- **Own Tank**
- **Outside Tank**
- **Tank Size Known**

*If the Tank size is check, the user must enter the actual tank size in the box below.

Furthermore, if the applicant gets denied, the date must be entered into the LIAP Denial Date box by the intake worker.

2) **The Heating Systems**: The user has the ability to **Add**, **Remove**, and/or **Re-Instate** a dwelling’s heating system and specify the system(s) priority and working condition. The user can furthermore also select whether the system and/or chimney have been cleaned during the year.

**Add a new or existing heating system**

*When adding a new or existing heating system, the user is to click the button and is then to complete the “Add New Heating Systems” wizard [as seen below].

The user now has to fill out four requirements in order to add the new heating system:

- **System Type**
- **Fuel Type**
- **System Priority**
- **Install Date**
Under the “System Type” check list, the user has the following options:
A) Electric Baseboard,  
B) Gas Boiler or Furnace,  
C) Oil Burner or Furnace,  
D) Oil/Gas Heater,  
E) Other,  
F) Wood or Coal Furnace, or  
G) Wood Stove.

Under the “Fuel Type” check list, the user has the following options based on selection of System Type:
A) Electric  
B) Natural Gas or LP Gas  
C) Kerosene or Oil  
D) Oil, Natural Gas, LP Gas, Kerosene, or Other  
E) Kerosene, Oil, Natural Gas, LP Gas, Coal, or Wood  
F) Coal or Wood  
G) Wood

Under the “System Priority” check list, the user has the following options:  
Primary, Secondary, Second Backup, or Third Backup.

Lastly, the user is required to state the “Install Date” of the new heating system.
Remove an existing heating system

**When removing an existing heating system, the user must first **highlight** the system to be removed, and then click the [Remove] button.**

Next, the user must complete the “**Remove Heating System**” wizard [as seen below].

The user has two choices for removing a heating system:

- **Retire**: This function is used when an existing system is no longer in use in dwelling. The user has to enter the “**Retirement Date**” in the allocated box.

- **Delete**: This function should ONLY be used if heating system was entered in error.

**NOTE**: A heating system should only be deleted if it was entered in error!

**NOTE**: Left click on the [Cancel] button to take no action.
Re-Instate a retired heating system

***To re-instate a retired heating system, first highlight the system to be re-instated, and then click the **Re-Instate** button.

Next, the user must click the **Yes** button to complete re-instatement of selected heating system.

**NOTE**: To take no action, left click the **No** button.
Fuel Vendors: The user has the ability to either 1) **Add a new vendor**, or 2) **Delete an existing vendor**.

**Add a new vendor**

To add a new vendor, the user has to click on the **Add** button:

Next, complete the “Add Fuel Vendor” wizard [as seen below] by selecting an existing energy vendor already listed in the drop down list, and then to finally select the fuel type appropriate for applicant’s heating system.

If the user wishes to add this selected vendor, click then **Add** button to finalize wizard. Otherwise, click **Cancel** button to take no action.

If the applicant already has a vendor which he/she would like to continue using, the user can check the “Requested Vendor” box. Also if the applicant already has a vendor, the “Name On Account” box should be filled-in along with the “Account Number” box.

**NOTE:** When a fuel vendor is added, the “Name on Account”- and “Account Number” boxes are required to be entered. If not, this could cause problems during payments later on.
When adding a wood vendor, the user has to specify “Wood Type” needed, this is accomplished by left-clicking the drop down list’s arrow and selecting appropriate wood type:

After a wood type has been selected, the user later has the ability to change type: To change, left-click Edit Wood Type button. [This button will only appear when a wood vendor is selected!]

NOTE: If the user enters a wood vendor that doesn’t deliver to the dwelling’s physical location, an info box will appear:
Delete an existing vendor

To delete an existing vendor, the user must first **highlight** the appropriate vendor, and then left-click on the **Delete** button.

Next, to complete the deletion, the user must left click on the **Yes** button to confirm deletion.

**NOTE:** To take no action, left click the **No** button.
**Income/Expense Tab**

The income/expense tab is used to report a household member’s income and expenses to calculate the applicant’s eligibility for benefits. The screen is divided up into four sections:

1. **Expenses** [Room-, Board-, Mortgage/Rent-, Mobile Home Lot per Month]
2. **Allowance** [Utility and Fuel]
3. **Income** [Add-, Edit-, or Delete household member’s income]
4. **Deductibles** [To be subtracted from total household’s income]

---

**1) Expense:** The user must type in the household’s monthly amount of expenses related to renting or owning dwelling.

If the household pays no rent, an explanation has to be typed into the “Zero Rent Reason” box.
Add Landlord

If the applicant is renting, the name of the landlord should be either:

A) Added from “Landlord” drop-down list, this is accomplished by left-clicking drop down list’s arrow and selecting the landlord’s name

OR [If landlord is not listed in list be]

B) Added by left-clicking the Add Landlord button.

If option B is chosen, the user has to complete the “Add New Landlord” wizard, as seen below.

The user is now required to type in the landlord’s “Organization Name”, “Taxpayer ID Number”, and “Activation Date”.

If the landlord is classified as a “1099 company”, then this box should be checked.

If applicable, the user can enter a description in the “Description” box; this is, however, not required.

Once all information has been entered, the user is encouraged to left-click the Next button.
NOTE: To avoid any action to take place, left-click **Cancel** button at any time!

Next, the user must fill in the landlord’s **mailing address** and its activation date:

Once completed, left-click on **Next >** button.

The user is now required to enter the new landlord’s **telephone number** by left-clicking into the appropriate boxes and entering “Country Code” (if applicable), “Area Code”, “Telephone Number”, “Extension” (if applicable), and “Activation Date”.

NOTE: The “Country Code” is only entered if the landlord lives outside the US.

Once completed, left click on the **Finish** button to finish adding new landlord.
2) Allowance:
The applicant’s monthly allowances should be entered into the “Monthly Allowances” group. These should be listed in the appropriate allocated boxes:

If 70% of utility allowance is used for calculation, then the user should check the appropriate box.

3) Income:
The income group is used to add all of the household members’ income based either on a 1-, 3-, or 12 month period; however, the 1 month period is not allowed for a standard LiHEAP application; it is only allowed for an ECIP Application.

Add a household member’s income

To add a household member’s income, the user must left click on the button on the lower part of the screen.

Once the user has clicked the button, the “Income Detail” wizard will appear:
First, the user must left click on the drop-down list for “Household Member”: The user here selects the person [already added to the household from the “Household Members Tab”] for whom the income is to be specified.

Next, the user must left click on the drop-down list for “Income Type” (for selected household member) to select one of the following options:

- Alimony, Child Support, Dividends, Foster Care, Interest, Other, Pension, Railroad unemployment, Rental Income*, Retirement Insurance and Ann, Self-Employment*, Social Security/SSD***, SSI***, TANF-In State, TANF-Out of State, Unemployment-In State, Unemployment-Out of State, Veterans Benefits, Wages, Worker Compensation, or Zero Income**.

*When the “Income Type” Rental Income or Self-Employment has been selected, the button will appear directly under the button.

**NOTE**: When selecting either of the two income types, the user is required to left click the button and to complete the worksheet.

The user is now to enter the “Business Name and Type” for the selected household member, and furthermore state the “Time Period” of the business’ operating time. It is also required that the user places his or her name in the preparer box [as seen below].
The household member’s financial information should be added under the “Gross Receipts or Sales” box and the “Costs of Goods Sold” box. Based on these two entries, the application will then [shown in the “Calculations” group box] calculate both the “Gross- and Net Profits” for the company.

If the company has any deductions to report, then first check the “Use Deductions” checkbox and then left click on the Add button in the “Deductions” group box.

Next, left click on the “Deduction Type” dropdown list and select the appropriate deduction type to use. Next left click in the “Amount” box and enter the appropriate amount for selected deduction type.
To delete a deduction, first **highlight** appropriate deduction and then left click on the **Delete** button.

Next, to complete the deletion, the user must left-click on the **Yes** button to confirm deletion.

**NOTE:** To take no action, left click the **No** button.

Once all deductions have been listed, the application will calculate the business’ Net Profit, which will be used in conjunction with all other incomes listed for household to determine applicant’s eligibility.

**NOTE:** The “Total Deductions” are listed under the “Calculations” group box and subtracted from the gross total to calculate the business’ net profit.

When the worksheet is completed, the user must left click the **Close** button.
**When the income type "Zero Income" is chosen, the button  

Zero Income Worksheet  will appear under the button.

When selecting this income type, the user is required to click the  

Zero Income Worksheet button and to complete the worksheet.

Next, the user is encouraged to enter: the "Reason For Zero Income", and (if known) the "Last Income Date" and "Employer".

Zero Income Worksheet

Household Member: Pete Test  
Reason For Zero Income:  
Last Income Date:  

Last Employer:  
Name:  
City:  
State:  
Employment End Date:  

Assistance:  

Received Assistance:  

Necessities:  
Document how the following necessities have been met:

- Food  
- Utilities  
- Electricity  
- Heating  
- Taxes  
- Transportation  
- Other Needs:  

Close
If the household member is “Receiving Assistance” [i.e. TANF] then the user has to check the appropriate checkbox. [As seen below]

Once the box is checked, the user will be required to write in the source(s) of the given assistance.

Finally, the user has to document how the household member’s “Necessities” have been met, by filling out the appropriate boxes.

Once the worksheet has been completed the user must left click on the **Close** button to the save information and to get back to the “Income Detail” screen.

***When the income types “SSI” and “Social Security/SSD” are chosen, MERAC requires these two incomes to be verified before the application can be certified. This verification is done via the DHHS income verification process in MERAC Management.

Based on the relevance of the “Income Type” drop-down list, the user should next select the household member’s “Income Source / Employer”.

If household member’s employer is not listed in the drop down list, then the user must add employer by left-clicking on the **Add Employer** button.
After left clicking on the button, the “Add New Employer” wizard will appear. This wizard is identical in execution as the “Add Landlord” wizard mention under the Expense group.

Next, the user must add the household member’s income amount based on a 1-, 3-, or 12 month period; however, the 1 month period is not allowed for a standard LiHEAP application; it is only allowed for an ECIP Application.

If the applicant has provided proof of income, for instance via pay stubs, the “Income Verified By” box should be used.

NOTE: If the applicant hasn’t provided proof of income, the box is left unchanged: INCOMPLETE.

Once all information has been completed, the user must left click on the button.
To take no action, please left-click on the [Cancel] button.

The wizard is to be repeated for all household members, until all incomes have been reported.

**NOTE:** If a household member claims “zero income”, a “zero income” form must be printed and filled out by household member.
Once the wizard is complete, the user must then select the duration for the income amount(s) which was/were inputted in the “Income Detail” wizard.

Once the household income period has been selected, the “Annualized Income” will automatically be listed.

Directly under the “Annualized Income” box, the household’s income eligibility will be shown, based on the State of Maine’s poverty range—this range is used to calculate the benefit amount.
Once all household members’ incomes have been added, the user can left click on the sign to the left of the household member’s name to get a **detailed list** of all of that household member’s incomes.
Edit a household member’s income

To edit a household member’s income, the user must first select the household member’s **appropriate income** in the list, and then left click the **Edit** button.

![Screenshot of Income Table]

This action will take the user back to the “**Income Detail**” wizard.

Delete a household member’s income

To delete a household member’s income, the user must first select the household member’s appropriate income in list, and then left-click on the **Delete** button.

Next, to complete the deletion, the user must left-click on the **Yes** button to confirm deletion.

![Screenshot of Confirm Deletion]

**NOTE**: To take no action, left click the **No** button.
4) **Deductibles:**

The amount of deductibles relevant must be entered into the appropriate box, labeled “Deductibles for this period”.

**NOTE:** Amount entered must be equal to period specified in “household income for” drop-down list.

Once amount has been entered, the “Annualized Income” amount will change, and thereby change the basis for the applicant’s eligibility.
Right-Click Option
The user has the ability to add comments to the applicant’s application by “Right-Clicking” the mouse button and then choosing the appropriate comment type: Each tab provides access to different comments. For instance, if the user “Right-Clicks” on the Summary Tab, then the user will have the access to the following:

LIHEAP App.-, Household-, Dwelling, or Review All Comments.

The following tabs provide access to the following comments:

**Household Members Tab:**
LIHEAP App.-, Household-, Person-, and Dwelling Comments

**Dwelling Tab:**
LIHEAP App.-, Household-, and Dwelling Comments

**Heating Systems Tab:**
LIHEAP App.-, Household-, Dwelling-, and Heating System Comments

**Income/Expense Tab:**
LIHEAP App.-, Household-, and Dwelling Comments
Add a comment
To add a comment into any of the above mentioned comments, simply follow the following guidelines:

1) Right click on tab
2) Select appropriate comment type and left click
3) Left click on Add button
4) Left-click on “Comment Field” and enter in comment

5) When done type comment, left click on button to save comment and exit back to main tab.

**Delete a comment**

To delete a comment, simply follow the following guidelines:

1) Right click on tab
2) **Highlight** area needed for comment and left click
3) Highlight “Comment Row” to delete by left-clicking on black arrow

4) Left-click on **Delete** button

5) Next, to complete the deletion, the user must left-click on the **Yes** button to confirm deletion

**NOTE:** To take no action, left click the **No** button.

6) To exit “Comment Window” and return on Tab view, left click on **DONE** button.
Printing of Blank Forms

The user has the ability to print blank forms needed for completing various tasks—these tasks include:

1) Consumption Override  
2) Denial of application  
3) Income worksheet [filled out by applicant]  
4) LiHEAP Application [filled out by applicant]  
5) Odd Income [filled out by applicant]  
6) Reminder  
7) Self-Employment [filled out by applicant]  
8) Subsidized Housing [filled out by applicant]  
9) Zero Income [filled out by applicant]

This section will only examine the blank forms in relation to an individual applicant. For all other forms, please see the “Reporting” section.
Each blank form to be printed needs to follow the same guidelines:

1) Choose appropriate form to print from the Reports drop-down menu
2) To print: left click on icon
3) To exit: left click on icon
**Application History Tracking**

To view an application’s history, click on the “Application History” tab.

MERAC will track the following on the new ‘Application History’ tab for an application in MERAC Assistance when:

- A new household application is created – “Application Created”
- A ‘New From Current’ is done – “Application Created”
- A ‘Certification’ has been done – “Application Certified”
- A ‘Recertification’ has been done – “Application Recertified”
- A ‘Bill Posting’ has been done – “Benefit Paid”
- A ‘Wire Posting’ had been done – “Benefit Paid”
- An application has been reopened – “Application Reopened”

**NOTE:** This function is not backward compatible and will only work for newly added applications.
Open Existing Application
To open an existing application left click on menu File, Open, and then select “LIHEAP Application”.

Next, input appropriate search criteria(s) in one and more of the following options:

First Name, Last Name,
Date of birth,
Identification Type, Identification Number,
Address Line 1, City, State, and Zip, and/or
Telephone no.

Once search criteria have been entered left click or tab to Search button.

Next, highlight wished applicant and left click on the Open Selected Application button to complete search.
**Benefit History**

To view an applicant’s benefit history, left click on the “Benefit History” Tab:

Next, left click on the appropriate icon, located to the left of the benefit type column, to view the appropriate benefit history.

In the following example, the Benefit Type LiHEAP was chosen:
**New from Current**

To create a “New from Current” application, the user must first open an already existing application:

File/Open/LiHEAP Application

Next, the “LiHEAP Application Search” screen will appear, and the user must fill in the name to search for and then left click the **Search** button.

Next, highlight the appropriate application from the previous program year to open, and left-click the **Open Selected Application** button.

After the application has opened, the user must verify that the correct application was loaded.
Once this has been verified, the user must left click the File menu and select “New From Current”.

Next, the user must verify if the household membership is still the same as from most recent application:

**NOTE: If the household membership has changed to the ...**

Please verify that the persons listed in the grid below are current household members for the purposes of the new LIHEAP PUDIP application. If one or more of the people no longer live in the home, enter the date they left in the “Through” date column. The “Through” date must be before the application date of the new application but after the date of the most recent application, 02/02/04.

**NOTE: If the household membership has changed extensively such that a new household should be created, click Cancel and use the New Household Application wizard to create the new household and application.

If nothing has changed click the Continue button to continue, if not assert the “Through Date” for members who no longer belong to the household.
Overview of the New From Current Functionality:

Program will question: does the family still live at the physical address?
   If yes, it will create a new application from the current one without any more questions
   If no, it will ask, “Is the family group essentially the same as listed below?”
      If yes, a new wizard will pop up to allow you to enter the new dwelling information.
         Complete the wizard
         Program will create a new application
   
If you say no, the program will tell you that you cannot use ‘New from Current’ and you will need to create a ‘New Household Application’ because neither the family group nor the dwelling are the same. This situation is essentially the same as that of a brand new client

The Yes option:
1. The following screen will appear:

   ![Has the Family Moved? screen]

   Left click [Yes] button.

2. Enter the data and then left click [Continue] button.
3. The following screen appears:

The new application is now ready for data entry to continue.

The No Option:
1. Now, left-click the **No** button.

2. The following screen will appear:

Next, enter the data and left click on the **Continue** button.
3. The Summary screen will appear and you can continue to enter the correct data.

**NOTE:** If you choose No on the “Has the family changed” screen, the program will tell you that you cannot use ‘New from Current’ and you will need to create a ‘New Household Application’ because neither the family group nor the dwelling are the same. This situation is essentially the same as that of a brand new client.
Reporting

Data Manipulation of General Population
The user has the ability to perform reporting on the MERAC database’s general population; this is done via the “Reports” menu:

Reporting concerning general population numbers are split up into the following sections:
1) Currently Selected Local Vendors
2) Labels
3) Lists
4) Printing of Blank Forms
5) Year-To-Date Statistics Report
**Currently Selected Local Vendors**

The first type of reporting which we are going to examine is the “Currently Selected Local Vendors” report. This type is of reporting is used to provide the user with a list of vendors which are currently available.

To access this report, the user has to first left click on the Reports menu and then select “Currently Selected Local Vendors”.

Next, the user will receive a full report on all currently selected local vendors. This report will appear in its own window and the user will from the window be able to send this report to print.

To print the full report, the user must left click on the icon.
**Labels**

The user has the ability to print out label-reports related to a certain reporting year. The “Labels” submenu is located under the Reports menu. The “Labels” submenu consists of the following:

- All Applications, All Certified Apps by Town, All Denied Applications, Home Owners, and Hypothermia Risk.

**All Applications**

The “All Applications” report offers the user the ability to print all applications received for a certain year.

To open the “All Applications” report, the user must first follow above mentioned procedure and then left click on the “All Applications” report.
Next, the user must to enter the “Program Year” which applies for the requested report. Once the year in has been entered, left click on the 

[OK] button.

**NOTE:** To cancel entering the report, left click on the [Cancel] button.

If the user clicked the [OK] button, the report will open in a new window. The user will be able to print this report by left-clicking on the [Print] icon. As seen in example with **Currently Selected Local Vendors**.

**“All Certified Eligible Apps by Town” through “Hypothermia Risk”**

The procedure for obtaining reports on “All Certified Eligible Applications by Town” through “Hypothermia Risk” follows the same procedure as described in **“All Applications”** example.
Lists

In the “Lists” submenu, the user has the ability to obtain detailed reporting based on program year. The reports are obtained by left-clicking on the “Reports” menu and then left-clicking on the “Lists” submenu.

This will give the user the options shown on the above shown screen print.

The procedure for printing any of these lists is the same as the one described in the Labels/All Applications example. Please see this section for further instruction.

Year-To-Date Statistics Report

The “Year-To-Date Statistics Report” gives the user the ability to print a detailed report on all activities occurred from the beginning of the year up to present date.

To obtain a print-out, left click on the “Reports” menu and the left click on the “Year-to-Date Statistics Report” menu item.
This will generate a crystal report which procedure for printing is the same as the one described under the “Labels/All Applications” section.
Certifier

**Standard LIHEAP Certification**

The certification process has to be handled by the certifier, and the time frame for certifying a LIHEAP application is 20 working days from the origin of the application.

To certify an applicant’s application, the certifier must perform the following steps:

I. Review the applicant’s data entered during intake process to assure that everything is filled out

<table>
<thead>
<tr>
<th>Summary</th>
<th>Household Members</th>
<th>Dwelling</th>
<th>Heating Systems</th>
<th>Income/Expense</th>
<th>Certification</th>
<th>Benefit History</th>
<th>ECIP</th>
</tr>
</thead>
</table>

Left click on all of the following tabs to check for completeness

1. **Summary**
2. **Household Members**
3. **Dwelling**
4. **Heating Systems**
5. **Income/Expense**
6. **Certification**
7. **Benefit History** [If applicable]

II. Verify that the correct number of Household members are listed

III. Verify:
   A) All sources of income are present, and
   B) Attached to the income worksheet
   **OR**
   Attach a written statement by intake worker stating that he/she saw proof of the documentation needed
   C) As applicable, calculate the utility allowance and place the figure in the utility allowance box

**NOTE:** The certifier signs the form indicating the utility information provided has been review!

   D) If applicant claims zero income, all the zero income forms must be completed and documented in the physical file

IV. Certification Requirements
   A) The following items must be complete on the application for certification
<table>
<thead>
<tr>
<th>Item</th>
<th>Comment</th>
<th>Application Tab</th>
</tr>
</thead>
<tbody>
<tr>
<td>Benefit Determination Method needs to be selected</td>
<td>Consumption, Design Heat Load, Subsidized</td>
<td>Certification</td>
</tr>
<tr>
<td>Intake Worker Required</td>
<td></td>
<td>Summary</td>
</tr>
<tr>
<td>Certifier Required</td>
<td></td>
<td>Summary</td>
</tr>
<tr>
<td>Number of rooms &gt; 0</td>
<td></td>
<td>Dwelling</td>
</tr>
<tr>
<td>Every person must have a date of birth</td>
<td></td>
<td>Household Members</td>
</tr>
<tr>
<td>Every person over 1 yr old must have ID (SSN or Alien)</td>
<td></td>
<td>Household Members</td>
</tr>
<tr>
<td>Must have an Electric Vendor</td>
<td>If an &quot;Has Electricity Account&quot; is checked at top of heating systems tab</td>
<td>Heating Systems</td>
</tr>
<tr>
<td>Must have a Dwelling Type other than UNKNOWN</td>
<td></td>
<td>Dwelling</td>
</tr>
<tr>
<td>Must have at least 1 income row</td>
<td></td>
<td>Income/Expense</td>
</tr>
<tr>
<td>Income row must be Verified</td>
<td>If SSI or SSD Income (IncomeTypeID 13 or 14)</td>
<td>Income/Expense</td>
</tr>
<tr>
<td>Heating Vendor is required</td>
<td>Unless HomeOwnershipType=Rent with Heat or HomeOwnershipType=Room/Board</td>
<td>Heating Systems</td>
</tr>
<tr>
<td>Requested Vendor is required</td>
<td>Unless HomeOwnershipType=Rent with Heat or HomeOwnershipType=Room/Board or BenefitDeterminationMethod = &quot;Subsidized&quot;</td>
<td>Heating Systems</td>
</tr>
<tr>
<td>Must have an active heating system</td>
<td>Active being No Retire Date</td>
<td>Heating Systems</td>
</tr>
<tr>
<td>Must have a heating system for each Vendor Fuel Type</td>
<td>Except for Electric Vendors if &quot;Utility Only&quot; is checked</td>
<td>Heating Systems</td>
</tr>
<tr>
<td>Must have Income Period of 1, 3 or 12 months</td>
<td></td>
<td>Income/Expense</td>
</tr>
<tr>
<td>Must have Home Ownership Type</td>
<td></td>
<td>Dwelling</td>
</tr>
<tr>
<td>FuelSubsidyAllowance is required</td>
<td>If HomeOwnershipType = Subsidized</td>
<td>Income/Expense</td>
</tr>
<tr>
<td>Item</td>
<td>Comment</td>
<td>Application Tab</td>
</tr>
<tr>
<td>----------------------------------</td>
<td>----------------------------------</td>
<td>-----------------------</td>
</tr>
<tr>
<td>Utility Allowance is required</td>
<td>If HomeOwnershipType = Subsidized</td>
<td>Income/Expense</td>
</tr>
</tbody>
</table>
V. Complete Certification Tab

Left click on “Certifier” drop down list box and select your name.

Next, left click on the “Calculation Method” drop down list box and choose appropriate calculation method: Consumption OR Design Heat Load

If applicable, check appropriate check boxes for Consumption Override Reasons

**NOTE:** If Reason Other is chosen, please state reason in Other Override Reason box

Next, left click on “View Calculation” box to verify LIHEAP benefit amount shown in LIHEAP Benefit Box.
VI. The certifier must sign and date the physical application and check the appropriate box identifying the Household’s eligibility or non-eligibility for LIHEAP assistance and all other programs, i.e. ECIP, Weatherization and CHIP.

VII. Next, the certifier is to left click on the Full Certification button to complete the certification process.
Next, the user is to left click on “Certification Date” box and change the date if different from default.

**NOTE:** Certification date must be equal to or after the Application date!

![Application Certification](image)

**If Eligible**

Next, indicate Eligibility by check off appropriate check boxes.

**NOTE:** If applicant is eligible for all, left click on the **All** button

Then, left click on the **Next >** button.

**NOTE:** If applicant is not eligible, then please see the “**If Non-Eligible**” section.
Next, the certifier must select the “Benefit Payee” in the appropriate box by left clicking on the icon.

**NOTE:** Primary Applicant is preferably never chosen as benefit payee!

Next, left click or tab to the button and hit Enter.

**NOTE:** Once certification process is complete, the application will lock!!!

**CONGRATULATIONS! Your Application is now certified!**
If Non-Eligible

Next, the certifier must left click on the “Denial Reason” drop down list box and select appropriate reason for denial

![Image of Certification of a Reopened Application]

Next, the certifier must left click on the “Comment” box and cite the application section of the Rule which is the basis for the denial.

Then, left click on the Next button to continue.

![Image of Certification of a Reopened Application]

The Application has been validated. Click Finish to complete the certification process.
Next, the certifier must left click on the “Reports” menu and select “Print Denial Form”.

Next, the certifier must verify that the form contains the appropriate information and the print it out.

Lastly, the certifier must mail the original copy to the client within 10 working days of the denial and keep a copy in the applicant’s physical file.
**ECIP Certification**

**NOTE:** A household is eligible for ECIP if it is experiencing (1) An Energy Crisis persists or (2) its members lives are threatened by an Energy Crisis situation

**AND** meets the following criteria:

The Household is income eligible for one of the following time periods, or is eligible for HEAP, whichever allows income eligibility:

1. The 12 calendar months immediately preceding the Date of Application for ECIP.
2. The 3 calendar months immediately preceding the Date of Application for ECIP.
3. The calendar month immediately preceding the Date of Application for ECIP.
4. The 30 days immediately preceding the Date of Application for ECIP.

Once ECIP application has been added, the certifier must left click on the **Certification** button.
Next, left click on “Certification Date” box and change date if different from default.

**NOTE:** Certification date must be equal to or after the Application date!

<table>
<thead>
<tr>
<th>ECIP Certification</th>
<th>Please Enter Certification Data</th>
</tr>
</thead>
<tbody>
<tr>
<td>Certification Date</td>
<td>01/11/2007</td>
</tr>
<tr>
<td>ECIP</td>
<td></td>
</tr>
<tr>
<td>Indicate Eligibility</td>
<td>X</td>
</tr>
</tbody>
</table>

If the application is to be denied, leave the check box unchecked. The denial reason will be selected on the next page.

---

**If Eligible**

Next, indicate Eligibility by check off appropriate check boxes.

Then, left click on the Next button.

**NOTE:** If applicant is not eligible, then please see the “If Non-Eligible” section.
Next, verify that the Benefit Payee listed is correct.

Then, left click or tab to the **Finish** button and hit Enter.

**NOTE:** Once certification process is complete, the application will lock!!!

**CONGRATULATIONS. Your Application is now certified!**
If Non-Eligible

Next, the certifier must left click on the “Denial Reason” drop down list box and select appropriate reason for denial:

Then, left click on the **Finish** button to finish

**NOTE:** If reason “Other” is chosen, a comment must be entered into the “Comment” box.
**Benefit Notification**

The following section will illustrate how the user handles Benefit Notifications.

First, left click on the **Benefits** menu and then select **“Batch Notification Report”** to obtain a summary of a given periods payments.

Next, the user is required to select the Start- and End date for payment report. Left click on each date box to input appropriate dates then left click or tab to **OK** button and hit Enter.

**NOTE**: To take no action, left click on- or tab to **Cancel** button and hit Enter.
The user will now be able to view and print the selected payment report.

To print report, left click on the icon.

To Exit, left click on the icon.
Next, to run the batch of benefit notification left click on the menu item Benefits and left click on “Run Batch of Benefit Notifications”.

**NOTE:** To take no action, left click on- or tab to the **Cancel** button and hit Enter.

The user will now be able to view and print benefit notification batch [See Benefit Notification section for further instruction].
Administration

LIHEAP
This section examines how the LIHEAP administrator performs his/her daily tasks.

Re-Open Application
To re-open an application which has been certified, the LIHEAP administrator must first load the appropriate application, and then left click on the “Tools” menu and select “Reopen Request”.

Once the administrator has clicked the “Reopen Request”, he/she must fill in a reason for reopen in “Reason for Request” box.

Next, to complete request the LIHEAP administrator must left click or tab to the Continue button and hit Enter.

NOTE: To take no action, left click or tab to the Cancel button and hit Enter.
Next, the LIHEAP administrator must left click on the button.

Next, to complete the process, the LIHEAP administrator must send an email to MaineHousing by filling in the following:
Supplemental Follow-Up

To initiate a supplemental follow-up, a “supplement run” has to have been executed on the MERAC Management side. So it is only relevant for the LIHEAP administrator to use the supplemental follow-up option, when so notified from external source (i.e. MaineHousing)

To view the Supplement Follow-Up for an applicant, the LIHEAP administrator must left click on the “Tools” menu and select “Supplemental Follow-Up”.

Next, the LIHEAP administrator must re-process each listed applicant on the “Supplemental Errors” tab.
NOTE: Supplement errors occur for the following reasons:
1. Unable to determine the correct Payee (most are in this category)
2. Unable to determine Benefit Determination Method (very few)
3. Unable to obtain an Application Lock (very few)
4. Unable to determine Primary Fuel Type (very few)
5. The vendor who passes all of the above is no longer an approved vendor.

To reprocess an applicant, the LIHEAP administrator must first highlight appropriate applicant and then left click on the button.

Next, select appropriate vendor for payment and left click on the button.

NOTE: If it is unclear who is to be receive payment, left click on the button and left click on the button to review case.
Once the appropriate vendor has been selected and the LIHEAP administrator has left clicked on the **Continue** button, the selected application will be processed for supplement.

Next, repeat same procedure until all applications have been processed.

### Void Current Application

To void a pending application, the LIHEAP administrator must first load the appropriate application, and then left click on the “Tools” menu and select “**Void Current App**”.

The application has now been voided!
DHHS Import Follow-Up

To initiate an DHHS Import follow-up, an import from DHHS has to have been executed on the MERAC Management side. So it is only relevant for the LIHEAP administrator to use the DHHS Import follow-up option, when so notified from external source (i.e. MaineHousing)

To view the DHHS Import Follow-Up, the LIHEAP administrator must left click on the “Tools” menu and select “DHHS Import Follow-Up”.

Next, the LIHEAP administrator must re-process each listed applicant on the “DHHS Import Errors” tab.

This process is identical to the Supplemental Follow-Up. For further instructions please Supplemental Follow-Up.

NOTE: DHHS import errors can occur for the following reasons:

1. SSN mismatch or transposition.
2. DOB mismatch or transposition. The corrective action would to verify the incorrect information with the client
3. Generic name or DOB mismatch. The corrective action would to verify the incorrect information with the client
4. SVES returned SSD, but it was not listed on the application or was incorrectly listed as SSI. The corrective action would be to add an SSD record for the individual.
5. SVES returned SSI, but it was not listed on the application or was incorrectly listed as SSD. The corrective action would be to add an SSI record for the individual

Rule of thumb: The corrective action would be to verify the incorrect information with the client. Using the ‘correct’ information provided by SSA as a reference
Export Ad Hoc Reporting Data

This function provides each CAA with the ability to automatically produce database views for ad hoc reporting. The export ad hoc reporting data function is only available to users that have admin rights and it can be found by going to Tools >> Export Ad Hoc Reporting Data.

The ad hoc reporting data will be exported into a user designated directory and the export files will be in the .csv format. To select where the export files are to be exported, click the Browse button and select a path to export the files.

Once the export directory has been selected, click on the Export Files button to begin the export.

The ad hoc reporting data export utility will export ad hoc reports according to the user’s designated agency. Meaning, a KVCAP user will only export ad hoc reports concerning KVCAP clients and a CCI user will only export ad hoc reports concerning CCI clients.
**Maintenance of Third Parties**

This section will examine how the user can add, edit, and delete employers, landlords, and intake sites. The procedures of adding, editing, and deleting are all relatively the same as discussed in the “Add Landlord” wizard from the Income / Expense tab.

First, the user is to select File/Open/Landlord / Employers / Intake Sites to gain access to the appropriate screen.

First, the user must select File/Open/Landlord / Employers / Intake Sites to gain access to the appropriate screen.

Next, the user must left click on the “Select Role” drop down list, by left-clicking on the icon, to choose between Client Employer, Intake Sites, or Landlord.
Employer

Add

To add a new employer, the user is encouraged to left-click on the Add button, this will in term take the user to the earlier mentioned “Add Employer” wizard [which is identical to the “Add Landlord” wizard]

Edit

To edit an existing employer, the user is encouraged to the left click on the “Organization Name” drop down list’s icon to choose employer.

NOTE: Names of employers are listed in alphabetical order.

To find sought employer either:

A) Type in first letter of employers name in drop down box, or
B) Use scroll function to seek.

Once appropriate employer has been found: left click on name to access employer information.
The user can now edit any needed information by left-clicking in any box.

**Delete**

To delete an employer, the user is encouraged to first pull up employer’s information as described in the *Edit* section.

Next, the user is encouraged to enter Deactivation date in the “Deactivation Date” box, by left-clicking on the box’s icon.

**NOTE:** Deletion in this section is only done through deactivation.
Landlords and Intake Sites
The procedure of adding, editing, and deleting either landlords or intake sites is the same procedure described in the Employer section.

Scheduler

To open the ‘Scheduler’, left click on menu File, Open, and then select ‘Scheduler’:

Next, the Scheduler will open and provide an overview of the current date’s appointments. Since this is the first time we are opening the Scheduler, the overview will be blank:
Selection of Site and Setup Function

To select the appropriate ‘Site’, left click on the drop down list to select desired site:

Next, to setup the general properties for the site—hereunder adding the names of intake workers to the calendar—left click on the Setup button.

This will open up the Calendar Setup window:

**Name of Site**

To setup time interval for appointments

To add names of intake workers to calendar

To delete name(s) of intake workers from calendar

To setup Start and End time of site’s hours

To setup days of site’s operation

To Exit
To setup the time interval for appointments:

1. First, left click on the drop down box:

2. Next, select appropriate interval:

3. Then, left click on close to return to calendar overview:

To add a slot/name to the calendar, left click on the button:

Then type in name of worker in text box:
To delete a slot/name from the calendar,

First highlight appropriate row:

Then, left click on the **Delete Slot** button.

To change working days for site:

Check and/or uncheck appropriate check boxes.

To change working hours for site, left click into **Start** and **End** fields.
The change of working days and hours can be seen on the overview screen of the Scheduler by the change in colors.

The dark color specifies time set outside working hours.

The light color specifies time set within working hours.

To exit the setup window, left click on the **Close** button.

**Loading of Appointments after a Certain Date**

By default, the Scheduler only loads appointments scheduled 3 months prior to the present date. To change this date, left-click into the date box that suits your need.
Add Appointment

To add an appointment to the scheduler, either:
1. Double left-click onto desired time slot
2. Left-click onto desired time slot and then left click the button

NOTE: When clicking a field, the field will automatically highlight in blue

Next, the Scheduler will automatically refresh/check to see if another appointment has been created in the same timeslot. If such an appointment exists, then you will see the following window appear:

Next, to avoid creating a new appointment in this slot, left-click on the button and try another timeslot.

Next, if there is no existing appointment in the timeslot selected, then the appointment window will show:
Add Recurrence

If the appointment is to be set for a subject or new client with no existing application info, then type in the client’s name or subject into the box.

Next, verify that the start and end date and times are correct:

If needed to be changed: Left click into appropriate drop down box.

If the appointment is an all day event, then please check the box.

Next, if the appointment is to recur over a set time interval, then click the button:

This will bring up the ‘Appointment Recurrence’ window:
To specify the recurrence pattern:

Please select appropriate pattern under the ‘Recurrence pattern’ section.

Next, to set the range of the recurrence:

Select appropriate start and end date (if any).

Then click button to setup recurrence.
To exit the recurrence window without adding a recurrence, left click the **Cancel** button.

The recurrence will show up on the overview screen by having an ⌁ icon next to the appointment:

To make changes to a recurrence, double click the appointment:

Then click the **Yes** button to modify all occurrences:

Next, click the **Recurrence** button to go back to the recurrence window:
To remove the recurrence, left click on the button, and left click on the button to finish.

Next, if the worker would like to be reminded ahead of time that he/she has an appointment:

Then left click the Reminder check box

Next, left click into the drop box

Then, select appropriate time to be reminded before appointment.
If the worker would like to color coordinate appointments on the overview screen:

Then that can be achieved by selecting the wished color from the ‘Color’ drop down list:

If the worker wishes to add a note to the appointment:

Then, left click into the ‘Notes’ text box to enter note:

Next, to finish creating the appointment, left-click on the **Save and Close** button.

The appointment will now show up on the overview screen under the selected worker and for the specified time:
NOTE: If you place your mouse pointer over the appointment, then notice that the note will appear.

To edit the appointment, double click on the appointment box:
Attachment of Inquiry Information

To attach inquiry information from an existing applicant:

First check the \( \checkmark \) Attatch Inquiry Information check box and then left the Find Previous Application button:

Next, the LIHEAP Application Search Window appears. Now search for applicant:

**LiHEAP Application Search**

Please Enter Search Criteria

The greater number of criteria entered - the more specific the result set

<table>
<thead>
<tr>
<th>First Name</th>
<th>Last Name</th>
<th>Date of Birth</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>gersmith</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Identification Type</th>
<th>Identification Number (SS#, etc.)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Address Line 1</th>
<th>City, State, Zip</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Telephone (7 digits)</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Clear Criteria</th>
<th>Search</th>
<th>Cancel</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
When the appropriate applicant is located:

Then left click on the Open Selected Application button.

Next a window will come up to confirm selection of applicant:

To continue adding information from application to scheduler, left click on the Ok button.
The appointment window will next populate with the appropriate information from the selected application:

To print the application, left click on the **Print Application** button.

If the applicant is new and not listed in the MERAC database, then the worker can manually type in known information into the “Attach Inquiry Information” section.
To process the inquiry, left click on the **Process Inquiry** button:

This will take the user to the ‘New Household Application’ wizard:

Please note that the entered information from the scheduler will automatically transfer over:
Delete Appointment

To delete an appointment, first highlight appointment to delete:

Then click on the **Delete Appointment** button.

The user can also delete an appointment by double clicking on the appointment, and then left clicking on the **Delete** button:

Next, the system will prompt the user to confirm deletion:

**Appointment Dialog**

Are you sure you want to delete this appointment?

[Yes]  [No]

So to finalize deletion, the user must click the **Yes** button.
Find Inquiry Appointment

To find an inquiry appointment in the scheduler, left click on the button.

Next, the “Inquiry Appointment Search” info window will appear:

Next, enter in the “First” and/or “Last” name of applicant.

**NOTE:** User can either type in the full spelling or only type in partial spelling. The system will simply list all appointments with specified spelling criteria:

Next, left click on the button to start search:

Next, the “Search Results” window will appear with searches that match the specified search criteria entered by user:
Next, if the wished appointment is found during search then this appointment can be opened by first highlighting the appointment and next left clicking on the button.

If the wished appointment is not listed, then left click on the button to return to the “Inquiry Appointment Search” info window

OR

Left click the button to return to the Scheduler overview.

NOTE: If a search performed doesn’t list any appointments, the following info window will appear:

![No Matches Found dialog box]

No records were found that match the search criteria!

Do you want to refine the search criteria?

Yes  No

Next, left click on the button to return to the “Inquiry Appointment Search” info window

OR

Left click on the button to return to the Scheduler overview.
Print Scheduler

To print the scheduler, click the button on the overview screen.

Next, the ‘Scheduler Printing Options’ window will appear:

This options window, allows the user to specify:

Print and Color styles:

Print Style: Daily
Color Style: Color

Start and End Dates:
Start Date: 3/29/2007
End Date: 3/29/2007

Max amount of pages:
Max Pages: 10

The user can also specify:

- Merge Calendar Slots
- Use Header & Footer
- Include Date Header
- Include Notes:
  - Blank
  - Lined
1. To have the calendar slots merged
2. Whether or not to use a header & footer
3. Whether or not to include a Date header

To preview the selected options, left click on the **Preview** button.

Next, to print the calendar, either:
1. Click the **Print** icon from the print preview, or
2. Click the **Print** button from the ‘Scheduler Printing Options’ window
Refresh Option

Since the scheduler is used by multiple users, the scheduler allows the user to refresh itself—meaning updating all new information entered by all users—by the click of the **Refresh** button.

The Scheduler will, however, automatically refresh itself 2 seconds after:

1. An appointment has been created
2. An appointment has been moved by dragging it from one location to another

Lastly, the Scheduler will check the database when the user first attempts to create a new appointment. In this way, the Scheduler will attempt to avoid appointments being created into the same timeslot.

Change View of Scheduler

The user has the ability to see more than one day at a time on the overview screen:

To achieve this, the user must **click and drag**—and thereby highlighting wished days to be viewed—on the monthly overview part of the screen.
This will change the overview to the following:

NOTE: to view remaining day selected, use scroll bar.

**Holiday Management**
This function is done at MaineHousing only and its functionality resides in the MERAC Management module.
User Controls

The user controls available to the user is the ability to change the login password to the MERAC Assistance system.

Change Password

To change the user’s password, left click on the “Security” menu and then select “Change Password”.

Once the user has selected this option, a “Reset Password” info window will appear.
The user now needs to type in the old password first into the designated “Old Password” box.

Next, enter the new password into the designated “New Password” box.

Lastly, confirm the new password by entering it into the “Confirm New Password” box. The reason for this confirmation is to make sure that the user didn’t mistype any part of the new password.

NOTE: Make sure to select a strong password consisting of both lower and uppercase letters as well as numbers.