

Maine State Housing Authority (MaineHousing)  
**SYSTEM ACCESS AUTHORIZATION REQUEST FORM**

**INSTRUCTIONS:** In order to gain access to Hancock Software's HEAP Cloud and HEAT Enterprise and/or ShareFile account each user is required to have a separate account. Multiple employees should not use the same log-on ID and password. Separate forms must be submitted for each user. New (and some returning) users will be required to take an on-line security training class. **Training must be successfully completed before the Hancock software user account will be activated.**

- (1) Complete this form, check the applicable boxes in the Authorization section, and email the executed form for each new user, change in user status and/or removal of user to MaineHousing at [EHSHelpDesk@mainehousing.org](mailto:EHSHelpDesk@mainehousing.org) or FAX 207-624-5780.  
**Note:** Include "Authorization Request" in the subject line of the email.
- (2) A secure email will be sent to the new/returning user with the applicable system web-site address, log-on user id, temporary password, and system support procedure. The CAA approver will also be notified when access has been granted.

### Employee Information

Effective Date: \_\_\_\_\_ Agency Name: \_\_\_\_\_

Employee Full Name: \_\_\_\_\_ Employee Title: \_\_\_\_\_

Employee Direct E-mail Address: \_\_\_\_\_

Employee Direct Phone Number: \_\_\_\_\_

Employee Type (*check all that apply*):  Full-time  Part-time  Returning

### Authorization

*Indicate access to be granted or changed for the above-named employee by checking all that apply.*

New User  Change in User Authorization  Remove User

HEAP Cloud	HEAT Enterprise	ShareFile
<input type="checkbox"/> <b>Agency View Only</b> – View client information and print applications <input type="checkbox"/> <b>Agency Intake</b> – Completes and qualifies applications <input type="checkbox"/> <b>Agency Certify</b> – Confirms accuracy of applications and initiates benefit allocation. <i>Note: This permission is needed to complete ECIP applications</i> <input type="checkbox"/> <b>Agency Administrator</b> – Includes rights of Agency Certify, ability to upload letters and view agency allocation totals	<input type="checkbox"/> <b>Agency User</b> – Access to Client Intake, Jobs/Workflow (including Work Order, Installation and Inspection) Vendor/Crew List, WAP Documents, Weatherization (Audit screens), Energy Savings Calculations, Invoicing, and System Reports <input type="checkbox"/> <b>Energy Auditor/Energy Inspector</b> – Access to Client Intake, Jobs/Workflow (including Work Order, Installation and Inspection), WAP Documents, Weatherization (Audit screens), and Energy Savings Calculations <input type="checkbox"/> <b>Fiscal Administration</b> – Access to Invoicing, Budget Adjust and System Reports <input type="checkbox"/> <b>Agency Administrator</b> – Access to all menu options available to Agencies  HEAT Enterprise users will automatically be assigned access to the ShareFile folder containing the <i>HEAT Enterprise Users Guide</i> .	<input type="checkbox"/> <b>CHIP/WAP Projects</b> – Upload/ retrieve waivers, open items reports, responses, and other job specific documentation <input type="checkbox"/> <b>Conflict of Interest</b> - Upload agency monthly conflict of interest reports <input type="checkbox"/> <b>LIAP/HEAP Reports</b> – Upload monthly A16, LIAP, and HEAP reports and billing summaries <input type="checkbox"/> <b>Grant Management/ Compliance</b> – Upload/retrieve agency audit documentation, budgets/ workplans, contracts and reports <input type="checkbox"/> <b>Home Repair Program</b> – Upload all change orders, Phase 1 and Phase 2 documentation, and HARP contractor approval request <input type="checkbox"/> <b>Federal Lead</b> – Upload all change orders, Phase 1 and Phase 2 documentation <input type="checkbox"/> <b>State Lead</b> – Upload all change orders, Phase 1 and Phase 2 documentation <input type="checkbox"/> <b>Other</b> - Documents not applicable to other ShareFile subfolders <input type="checkbox"/> <b>Rent Relief Initiative</b> <input type="checkbox"/> <b>HEAT Enterprise Users Guide</b>

\_\_\_\_\_  
 CAA Manager/Director Signature

\_\_\_\_\_  
 CAA Manager/Director Name

MaineHousing Only	
ShareFile Approved _____	Date: _____
HEAP Cloud Approved: _____	Date: _____
HEAT Enterprise Approved _____	Date: _____
<input type="checkbox"/> Sent Training Email _____	
<input type="checkbox"/> Set up HEAP Cloud _____	
<input type="checkbox"/> Set up HEAT Enterprise _____	
<input type="checkbox"/> Set up ShareFile _____	