

# How to Merge an Application with a Prior Year Application

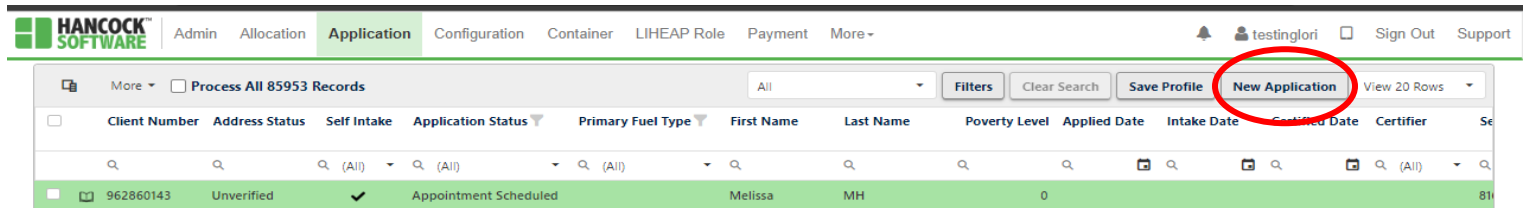
CAA's are to merge the on-line Application and prior year Application once the intake appointment has started.

To merge the on-line Application and prior year Application will need to be listed on the Application List Screen for selection.

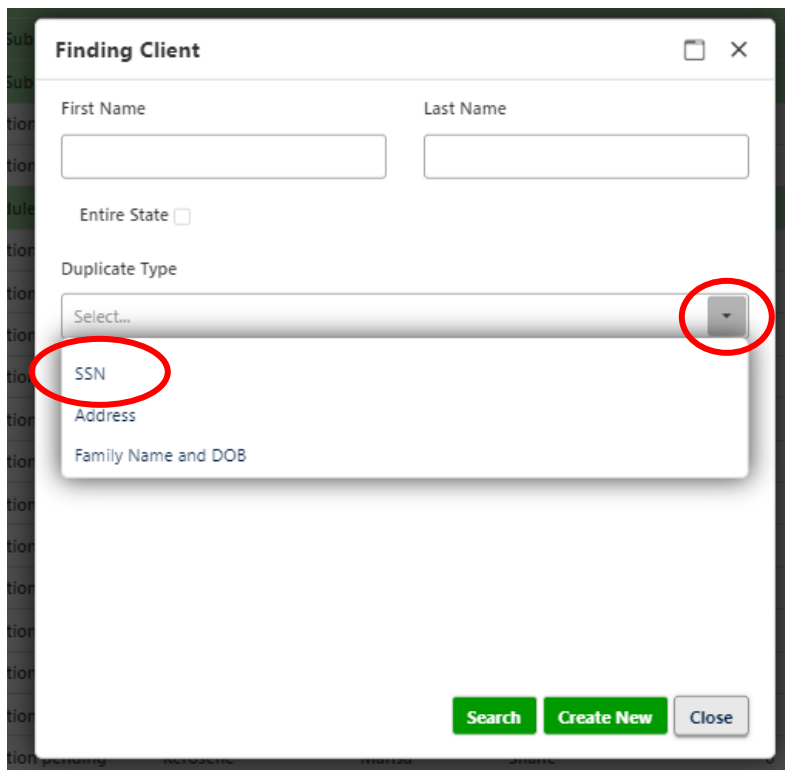
**Note: SSN number for one of the household members is required.**

To get the on-line Application and the prior year Application on the Application List screen the following steps are:

Click on 'New Application' Button

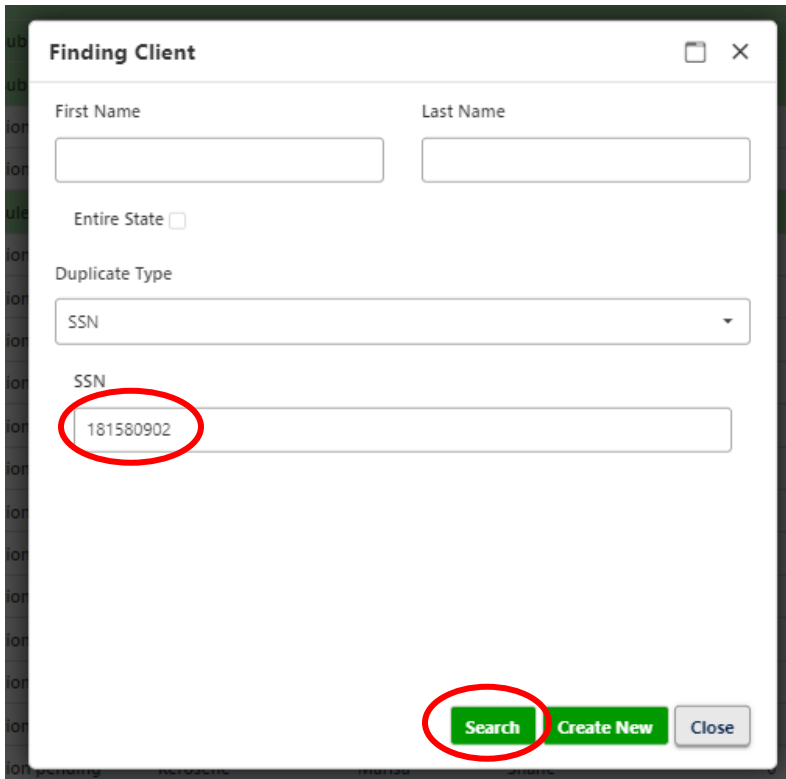


Select the Gray drop down arrow and select "SSN".



Enter the SSN#

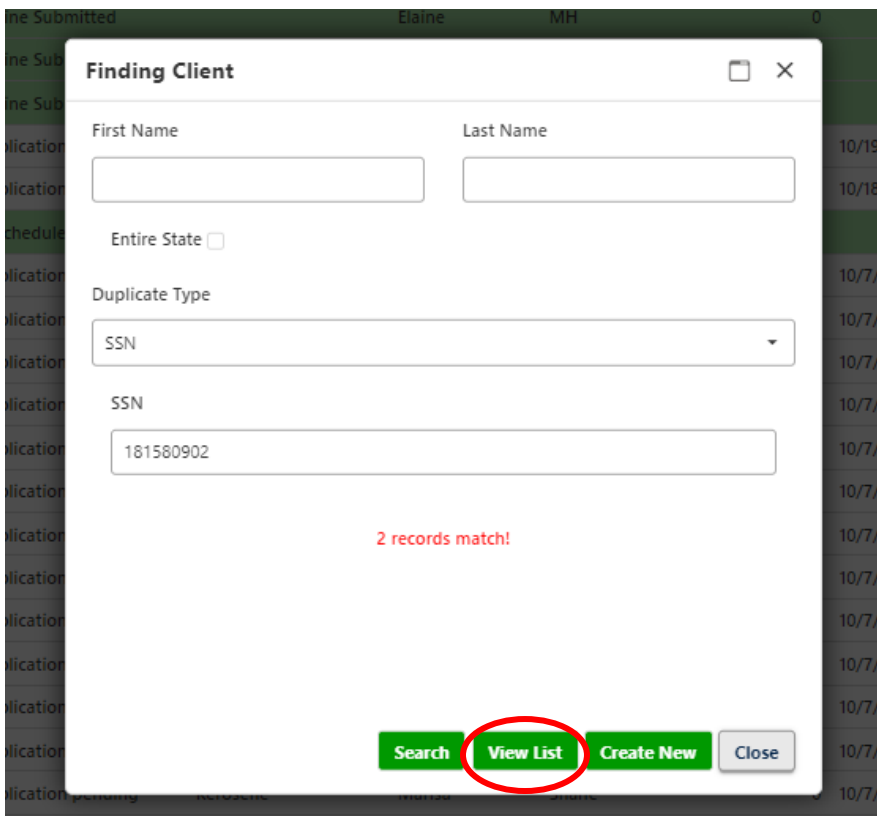
Click 'Search' Button



The screenshot shows a web form titled "Finding Client". It contains several input fields: "First Name", "Last Name", "Entire State" (with a checkbox), "Duplicate Type" (a dropdown menu set to "SSN"), and "SSN" (a text box containing "181580902"). At the bottom, there are three buttons: "Search", "Create New", and "Close". The "Search" button is circled in red.

A message will display of what records match the SSN

Click 'View List' Button



This screenshot shows the same "Finding Client" form, but now it displays search results. The "SSN" field still contains "181580902". Below the form, a red message reads "2 records match!". At the bottom, the buttons are "Search", "View List", "Create New", and "Close". The "View List" button is circled in red.

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The on-line application (self-intake) and prior year application will populate. Review the prior year Application against the on-line Application submitted to ensure that the correct prior Application has populated from the SSN# search.

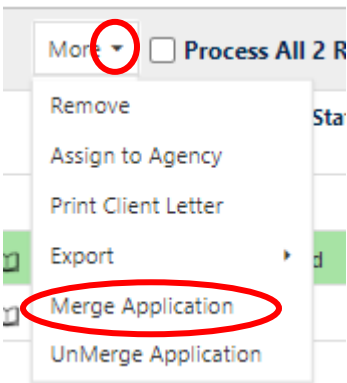
Client Number	Address Status	Self Intake	Application Status	Primary Fuel Type	First Name	Last Name	Poverty Level	Applied Date	Intake Date	Certified Date	Certifier
962860143	Unverified	✓	Appointment Scheduled		Melissa	MH	0				
1378439086	Verified		Certified Eligible - Paid	Kerosene	Melissa	MH	101	6/15/2022		07/22/2022	Mary Jo Christian (m

Click in the white check box at the top to select the **two** Applications to be merged or select each individually.

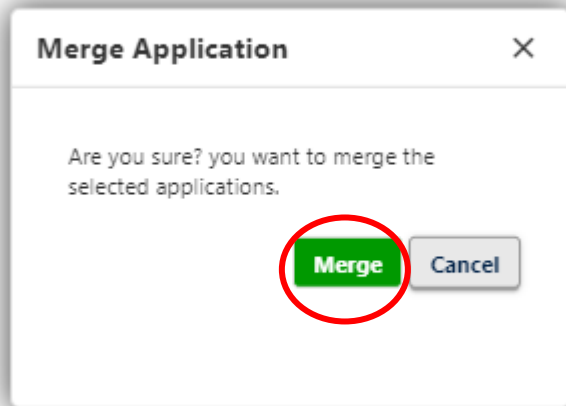
Client Number	Address Status	Self Intake	Application Status	Primary Fuel Type	First Name	Last Name	Poverty Level	Applied Date	Intake Date	Certified Date	Certifier
962860143	Unverified	✓	Appointment Scheduled		Melissa	MH	0				
1378439086	Verified	✓	Certified Eligible - Paid	Kerosene	Melissa	MH	101	6/15/2022		07/22/2022	Mary Jo Christian (m

Click on the gray drop down arrow.

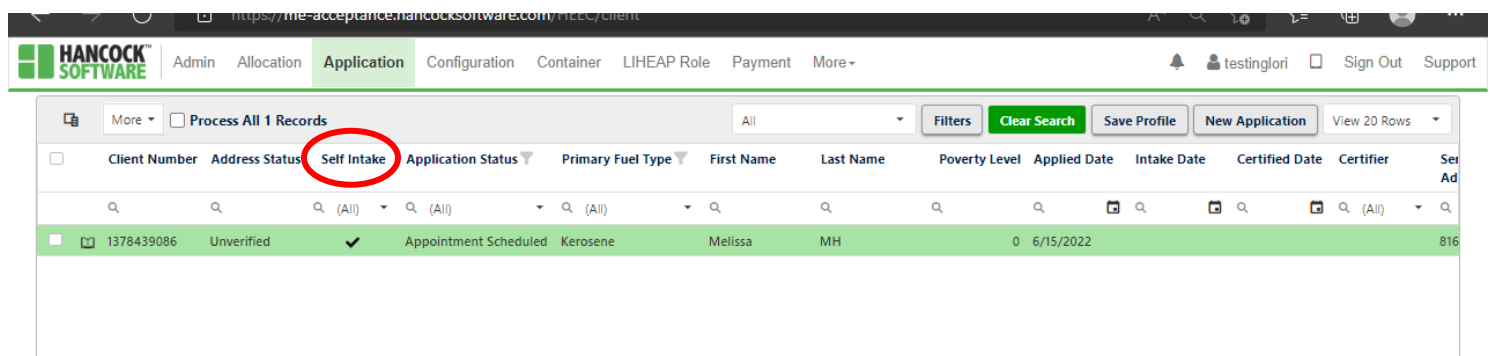
Select Merge Application



Window will pop up asking to confirm the merge. Click Merge. If not sure, click cancel.



The on-line submitted Application will be the Application that is now on the Application List screen. The Client Number will have updated to what the prior year Applicant Number was and will still be highlighted in green.



The screenshot shows the Hancock Software interface. The "Application" tab is selected. The "Self Intake" column header is circled in red. Below the header, a table displays application records. The first record is highlighted in green.

Client Number	Address Status	Self Intake	Application Status	Primary Fuel Type	First Name	Last Name	Poverty Level	Applied Date	Intake Date	Certified Date	Certifier	Se	Ad
1378439086	Unverified	✓	Appointment Scheduled	Kerosene	Melissa	MH	0	6/15/2022				816	

## To begin Intake:

Enter the Applied Date and click 'Save' Button.

The screenshot shows a web application window titled "Application - Melissa MH - Application pending". At the top right, there are buttons for "New Application" and "Print Client Letter", and a "More" dropdown menu. Below the title bar, there is a search bar with "Melissa MH [10/20/2022]" and tabs for "Application Info", "Benefits", and "History". On the right side, there are buttons for "Cancel", "Save" (circled in red), "Verify Address", and "Save Settings". The main content area contains two rows of questions: "Does anyone in your household currently receive TANF Benefits? (Select Yes or No)" with the answer "No", and "Does anyone in your household currently receive SNAP Benefits? (Select Yes or No)" with the answer "No". Below this is a section titled "Application" with a "Active" checkbox checked. It includes fields for "Appointment Date and Time" (10/20/2022, 11:00 AM), "Applied Date\*" (circled in red), "Intake Date" (10/20/2022), and "Application Method\*". There are also dropdown menus for "Owner Type\*" (Own), "Dwelling Type\*" (Mobile/Manufactured ...), and "Number Of Rooms\*" (4). At the bottom, there are fields for "Intake User" (Lori McPherson, circled in red), "Created Date" (10/20/2022), and "Online Submitted Date" (10/20/2022).

The Application status will change from "Appointment Schedule" to "Application Pending". "Intake Date" and Intake User will populate.

Intake Staff can then proceed with the intake process.

This screenshot shows the same application form as above, but with the "Intake Date" field (10/20/2022) and the "Intake User" field (Lori McPherson) circled in red. The "Applied Date" field is now populated with "10/20/2022". The "Save" button is now disabled. The "Intake Date" field is also populated with "10/20/2022". The "Intake User" field is populated with "Lori McPherson". The "Created Date" field is populated with "10/20/2022" and the "Online Submitted Date" field is populated with "10/20/2022".

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**Note:** In Family section, when an Application is merged it will copy what the Applicant entered. So if the SSN# or the Date of Birth and any other information in the family section is entered incorrectly, the new application is going to have to be updated. If the Applicant misspells a family member's name, the family member will show up twice.

One in yellow (this is the prior year Household Member) and then one in white (the new Household Member information). HEAP Cloud is assuming this is a new Household Member. CAA's will need to review and make corrections accordingly and remove the duplication.