

# How to Enter Delivery Payment Information

Once the Vendor has submitted the ECIP delivery documents and the CAA has reconciled the information, the delivery information must be entered in HEAP Cloud for the Vendor to be paid.

Open the appropriate client application and go to the Benefits tab.

- Click on the grey expansion arrow to view the ECIP Qualified Allocation on the benefits tab.

**NOTE:** Make sure to be on the appropriate allocation line. Match up the PO number to ensure the ECIP information is to be entered on the correct allocation line.

If the **amount of the ECIP to be paid is the same as what was originally listed** on the PO.

- Next to the ECIP Vendor, scroll to the right and click in the 'Service Date' field. Enter the date of when the ECIP was delivered.
- Tab over to the 'Agency Approval Date' field. Enter the date the CAA is entering the ECIP Delivery Record into HEAP Cloud.
- Click 'Save'.
- Upload Vendor's ECIP Delivery submission. (See How to Upload ECIP Requirement Documents).

The screenshot shows the HEAP Cloud interface for a client application. The title bar reads "Application - Robin L MH - Certified Eligible - Paid". The main content area has tabs for "Application Info", "Benefits", and "History". The "Benefits" tab is active, showing a "Qualified Allocation" table. The table has columns for Allocation, Benefit Date, Additional Benefit, Benefit, Balance, and Max Remaining. Two rows are visible: one for "2023HEAP" and one for "2023ECIP". Below the table, there are buttons for "Switch Vendor", "Add", "Save", "Cancel", "Remove", "Rescind", and "Close Allocation". The "Save" button is circled in red. Below the table, there are fields for "Service Date" and "Agency Approval Date", both of which are circled in red. The "Service Date" field contains "10/24/2022" and the "Agency Approval Date" field contains "11/10/2022".

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023HEAP	10/12/2022	\$0.00	\$1,430.00	\$0.00	\$0.00
2023ECIP	10/24/2022	\$0.00	\$800.00	\$195.10	\$195.10

Service Date	Agency Approval Date	Approved By	Credit Notification	Payment Date	Payment ID	Pay
10/24/2022	11/10/2022					

If ECIP Amount has been reconciled and **found to be less than the PO** (example: Vendor noticed, prior to submitting for documentation for payment, there was \$3.28 left in PY2023 HEAP that is required to be used, so they adjusted what ECIP amount to be paid.)

- Next to the ECIP Vendor, click in the 'Unit Cost' and adjust the **total of what the ECIP Amount** to be paid should be.
- Tab to the 'Service Date' field. Enter the date of when the ECIP was delivered.
- Tab over to the 'Agency Approval Date' field. Enter the date the CAA is entering the ECIP Delivery Record into HEAP Cloud.
- Click Save.

Application - Robin L MH - Certified Eligible - Paid

Robin MH [08/05/2022]

Application Info Benefits History

Quality Certify Undo Certify

Denied Reason: none Denied Date:

Qualified Allocation

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023HEAP	10/12/2022	\$0.00	\$1,430.00	\$0.00	\$0.00
2023ECIP	10/24/2022	\$0.00	\$800.00	\$195.10	\$195.10

Switch Vendor Add Save Cancel Remove Rescind Close Allocation

Fuel Type	Quantity	Unit Cost	Amount	Comment
Oil		\$601.62	601.62	100 gallons of Oil must be delivered within 18 hours. Cash Price \$5.299 with \$75.00 delivery fee. ECIP Certified on 10-24-2022@11:04 am.

Application - Robin L MH - Certified Eligible - Paid

Robin MH [08/05/2022]

Application Info Benefits History

Quality Certify Undo Certify

Denied Reason: none Denied Date:

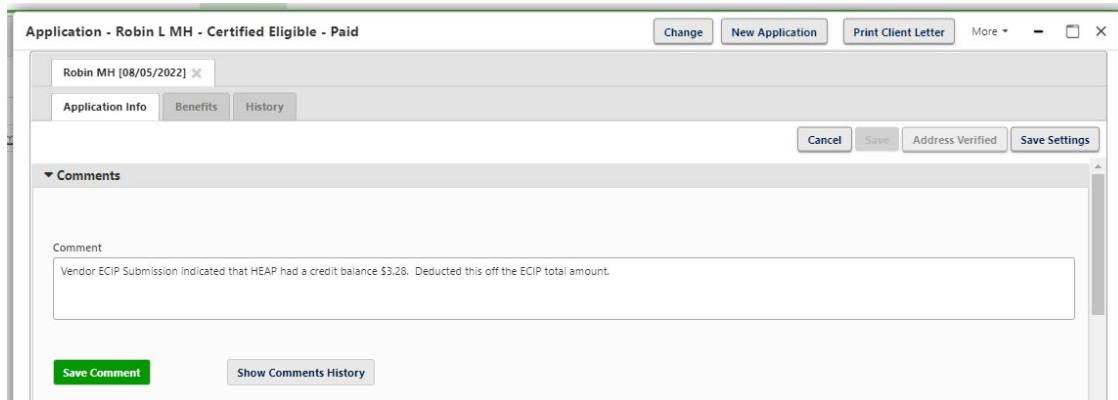
Qualified Allocation

Allocation	Benefit Date	Additional Benefit	Benefit	Balance	Max Remaining
2023HEAP	10/12/2022	\$0.00	\$1,430.00	\$0.00	\$0.00
2023ECIP	10/24/2022	\$0.00	\$800.00	\$195.10	\$195.10

Switch Vendor Add Save Cancel Remove Rescind Close Allocation

Service Date	Agency Approval Date	Approved By	Credit Notification	Payment Date	Payment ID
10/24/2022	11/10/2022	Log: McPherson			

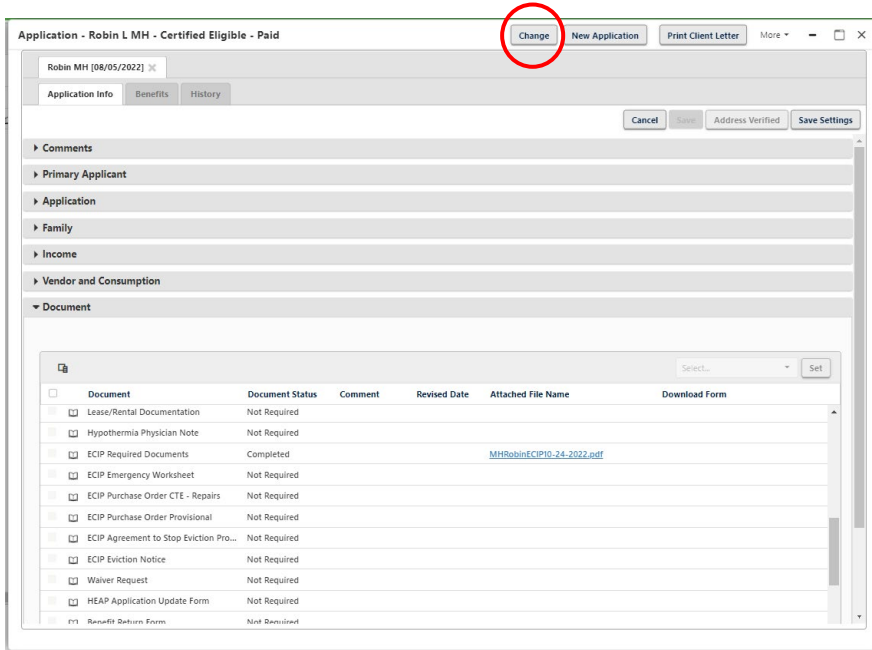
- Enter a comment in the comment section of the application as to why the total delivery amount was less than what was originally listed on ECIP Purchase order.



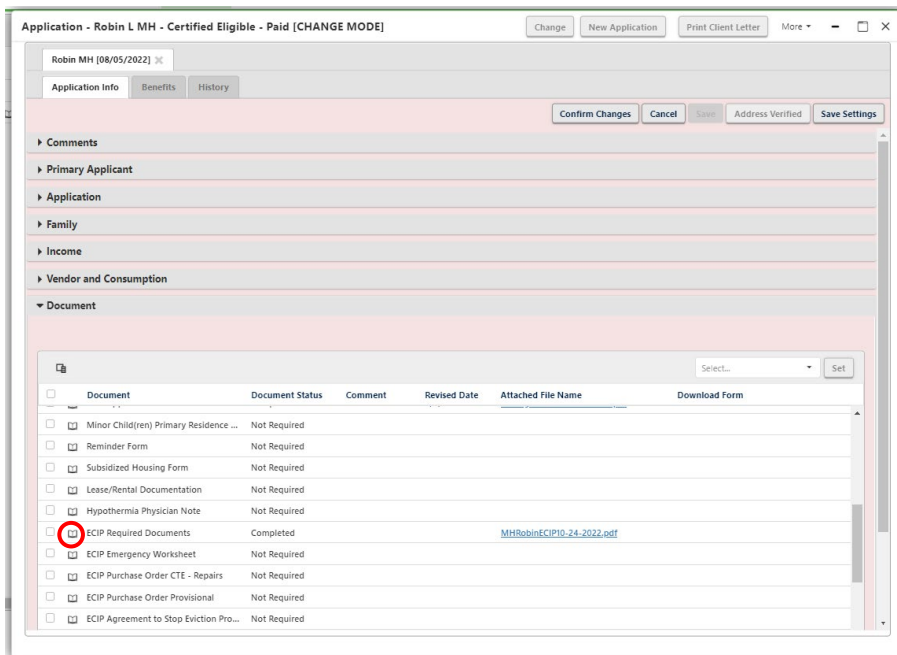
Upload ECIP Vendor Submission records. (See instructions how to upload the ECIP Vendor Submission. **(New Process)**)

# To upload the ECIP Vendor Submission. (New Process) Previously Vendor Submission were uploaded on the benefits tab.

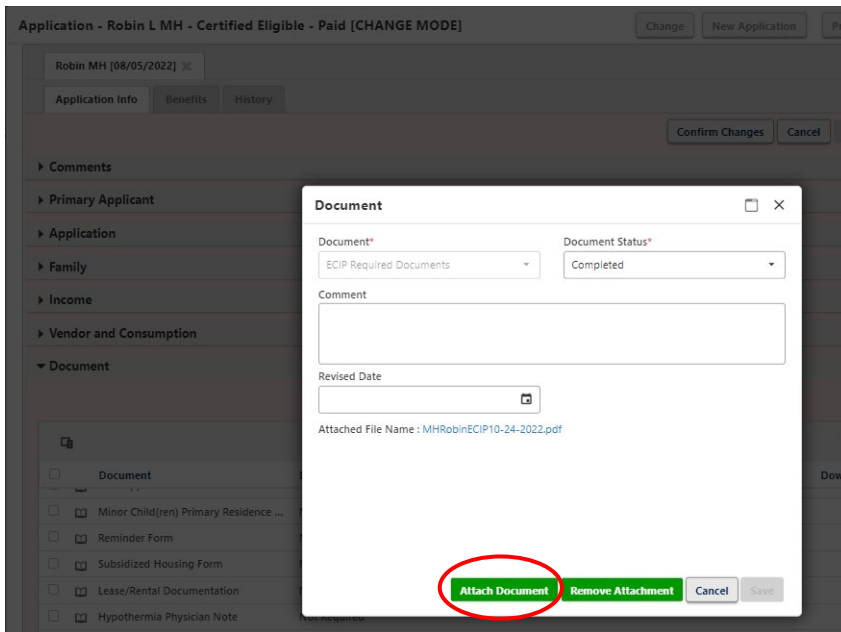
Click 'Change' Button.



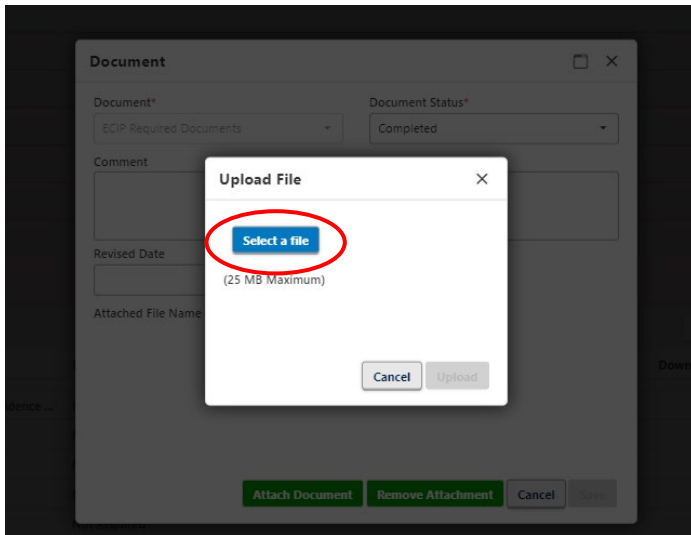
Double click on 'Book Icon' next to ECIP Required docs.



Click 'Attach Document'.



Click 'Select a file'.

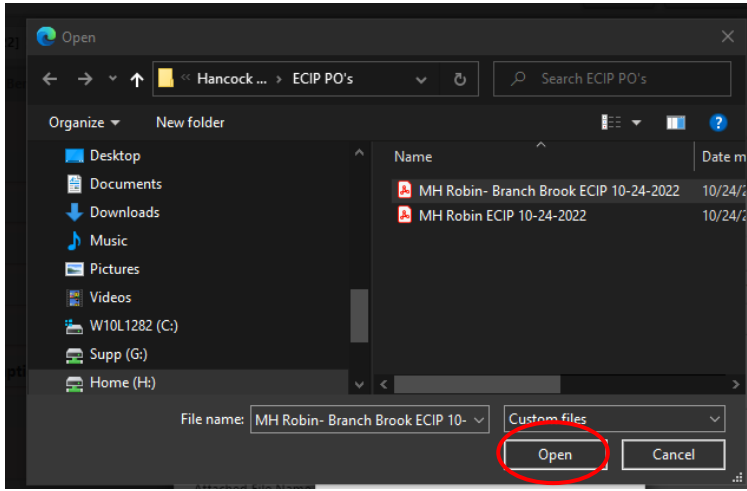


Locate the Vendor ECIP delivery Records (documents should be saved with name and date of ECIP).

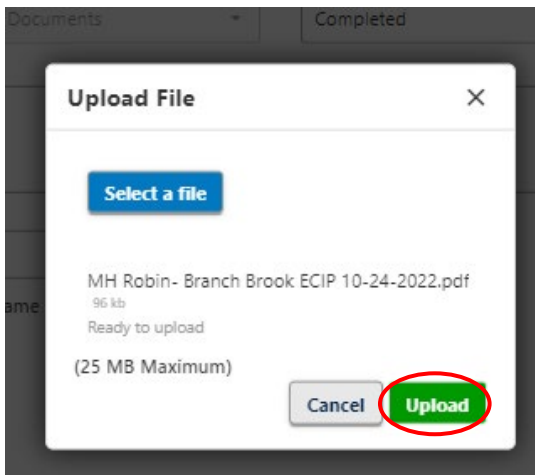
The document should be in the following order:

- Purchase Order (if vendor has submitted and has notes written).
- Delivery ticket.
- Invoice (if applicable- delivery ticket does not match ECIP PO or deliverables are Wood, Wood Pellets, Coal, Corn, Bio-Bricks).
- Confirmation letter of remedied disconnect (utility/natural gas vendors only).

Click 'Open'.



Click 'Upload'.



Verify that the ECIP File and the ECIP Vendor Submission File has been uploaded.

**Document** [Close]

Document\* ECIP Required Documents Document Status\* Completed

Comment

Revised Date

Attached File Name
<input type="checkbox"/> <a href="#">MHRobinECIP10-24-2022.pdf</a>
<input type="checkbox"/> <a href="#">MHRobin-BranchBrookECIP10-24-2022.pdf</a>

**Attach Document** Remove Attachment Cancel Save