

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.

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.
- See instructions below for uploading Vendors ECIP Delivery submission.

The screenshot displays the Hancock Software application interface. The main window is titled "Application - Heather MH - Benefit Applied". The "Benefits" tab is active, showing a "Qualified Allocation" table. The table has columns for Allocation, Benefit Date, Additional, Benefit, Balance, and Max Remaining. The row for "2021ECIP" is selected, and its "Benefit" value of \$400.00 is highlighted. Below the table, the "Save" button is circled in red. Below the "Save" button, a table shows vendor information for "A E Robinson Oil Co. Inc.-Greenville - Oil". The "Service Date" (10/8/2020) and "Agency Approval Date" (10/22/2020) fields are circled in red. The "Messages" section at the bottom shows a message for allocation "2021TANF" regarding eligibility.

Allocation	Benefit Date	Additional	Benefit	Balance	Max Remaining
2021TANF	10/7/2020	\$0.00	\$350.00	\$0.00	\$0.00
2021HEAP	10/7/2020	\$0.00	\$825.00	\$825.00	\$0.00
2021ECIP	10/7/2020	\$0.00	\$400.00	\$140.10	\$140.10

Vendor	Fuel Type	Quantity	Unit Cost	Amount	Service Date	Agency Approval Date	Com	
A E Robinson Oil Co. Inc.-Greenville - Oil	Oil	PO	1	\$259.9000	\$259.90	10/8/2020	10/22/2020	Oil n

If ECIP Amount has been reconciled and found to be less than the PO (example: client did not take the full 100 gallons).

- 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.
- Enter a comment in the comment section of the application as to why the delivery is less than what was originally listed on ECIP Purchase order.
- See how to Upload Vendor’s ECIP Delivery submission below.

The screenshot shows the Hancock Software application interface. At the top, there is a navigation bar with tabs for Allocation, Application, Payment, Report, Vendor, and Configuration. The 'Application' tab is active. Below the navigation bar, there is a search and filter section with a 'Clear Search' button and a 'New Application' button. The main content area displays 'Application - Heather MH - Benefit Applied' with a table of benefits. The table has columns for Client Number, Application Status, First Name, Last Name, Applied Date, Certified Date, Certifier, Service Street Address, Service Apartment, and Service City. Below the table, there are buttons for 'Qualify', 'Certify', and 'Undo Certify'. A table below that shows vendor information with columns for Vendor, Fuel Type, PO, Quantity, Unit Cost, Amount, Service Date, Agency Approval Date, and Comment. A red circle highlights the 'Unit Cost' and 'Amount' columns in this table.

Client Number	Application Status	First Name	Last Name	Applied Date	Certified Date	Certifier	Service Street Address	Service Apartment	Service City
Heather MH	09/17/2020								

Vendor	Fuel Type	PO	Quantity	Unit Cost	Amount	Service Date	Agency Approval Date	Comment
A E Robinson Oil Co. Inc.-Greenville - Oil	Oil	PO	1	\$231.6500	\$231.65	10/8/2020	10/22/2020	Oil must be deliver

To upload the ECIP Vendor Submission records click on the white box next to the ECIP Vendor. Click the “Upload Document” button

Application - Heather MH - Benefit Applied

Heather MH [09/17/2020]

Application Info Benefits History

Qualify Certify Undo Certify

Denied Reason: none Denied Date: [calendar icon]

Qualified Allocation

Allocation	Benefit Date	Additional	Benefit	Balance	Max Remaining
2021TANF	10/7/2020	\$0.00	\$350.00	\$0.00	\$0.00
2021HEAP	10/7/2020	\$0.00	\$0.00	\$0.00	\$0.00
2021ECIP	10/7/2020	\$0.00	\$400.00	\$168.35	\$168.35

Switch Vendor Add Save Cancel Remove Rescind PO Upload Document Close Allocation

Vendor	Fuel Type	Quantity	Unit Cost	Amount	Service Date	Agency Approval Date	Com	
A E Robinson Oil Co. Inc.-Greenville - Oil	Oil	PO	1	\$231.6500	\$231.65	10/8/2020	10/22/2020	Oil n

Messages

Click “Select File”

Application - Heather MH - Benefit Applied

Heather MH [09/17/2020]

Application Info Benefits History

Qualify Certify Undo Certify

Denied Reason: none Denied Date: [calendar icon]

Qualified Allocation

Allocation	Benefit Date	Balance	Max Remaining
2021TANF	10/7/2020	\$0.00	\$0.00
2021HEAP	10/7/2020	\$0.00	\$0.00
2021ECIP	10/7/2020	\$168.35	\$168.35

Switch Vendor Add Save Cancel Remove Rescind PO Upload Document Close Allocation

Vendor	Fuel Type	Quantity	Unit Cost	Amount	Service Date	Agency Approval Date	Com	
A E Robinson Oil Co. Inc.-Greenville - Oil	Oil	PO	1	\$231.6500	\$231.65	10/8/2020	10/22/2020	Oil n

Messages

Upload File

Select file

(25 MB Maximum)

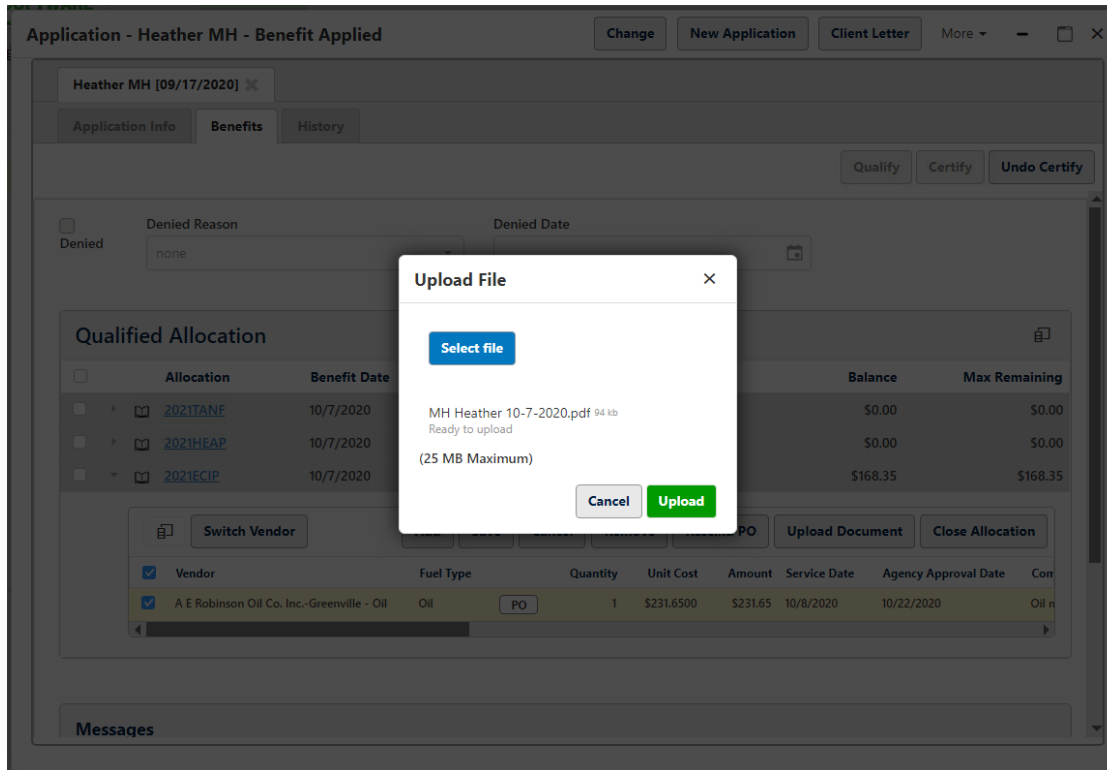
Cancel Upload

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

The document should be in the following order:

- Purchase Order
- Delivery ticket
- Invoice (if applicable)
- Confirmation letter of remedied disconnect (utility/natural gas vendors only)

Click on Upload.



Scroll over to verify the document uploaded correctly under the “Attached File” Field by clicking on the file link.

The screenshot shows a software application window titled "Application - Heather MH - Benefit Applied". The window has a header with buttons for "Change", "New Application", and "Client Letter". Below the header, there are tabs for "Application Info", "Benefits", and "History". The "Benefits" tab is active, showing a "Denied Reason" dropdown set to "none" and a "Denied Date" field. Below this is a "Qualified Allocation" section with a table of allocations. The table has columns for Allocation, Benefit Date, Additional, Benefit, Balance, and Max Remaining. The allocations are: 2021TANF (Benefit: \$350.00), 2021HEAP (Benefit: \$0.00), and 2021ECIP (Benefit: \$400.00). Below the allocations is a table of "Attached File" with columns for Payment ID, Payment Number, Check Number, PO Number, PO Date, Attached File, Original Amo..., Rescinded, and Resci. The file "MHHeather10-7-2020.pdf" is highlighted in yellow and circled in red. The window also has a "Messages" section at the bottom.

Allocation	Benefit Date	Additional	Benefit	Balance	Max Remaining
2021TANF	10/7/2020	\$0.00	\$350.00	\$0.00	\$0.00
2021HEAP	10/7/2020	\$0.00	\$0.00	\$0.00	\$0.00
2021ECIP	10/7/2020	\$0.00	\$400.00	\$168.35	\$168.35

Payment ID	Payment Number	Check Number	PO Number	PO Date	Attached File	Original Amo...	Rescinded	Resci
			6196	10/7/2020	MHHeather10-7-2020.pdf			