

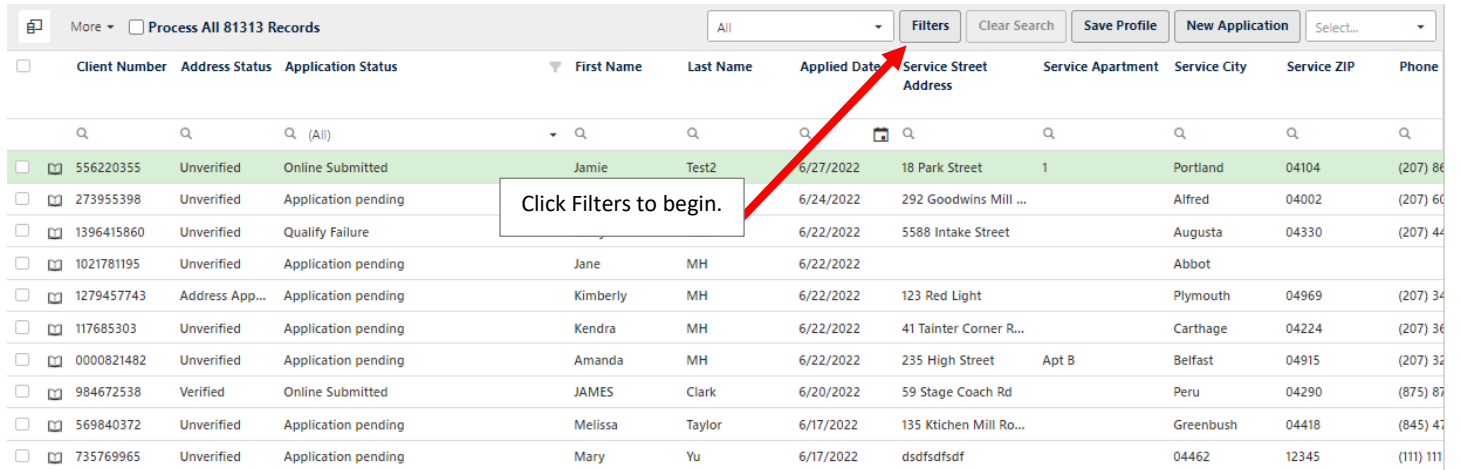
How to Create a Filter

The Filter feature is essentially a more in depth Search function. It can be used to search for an item that does not appear on the Client Screen or to filter (search) on multiple fields at one time.

Filters can be created by all HEAP Cloud users and saved for future use.

To create and save a Filter:

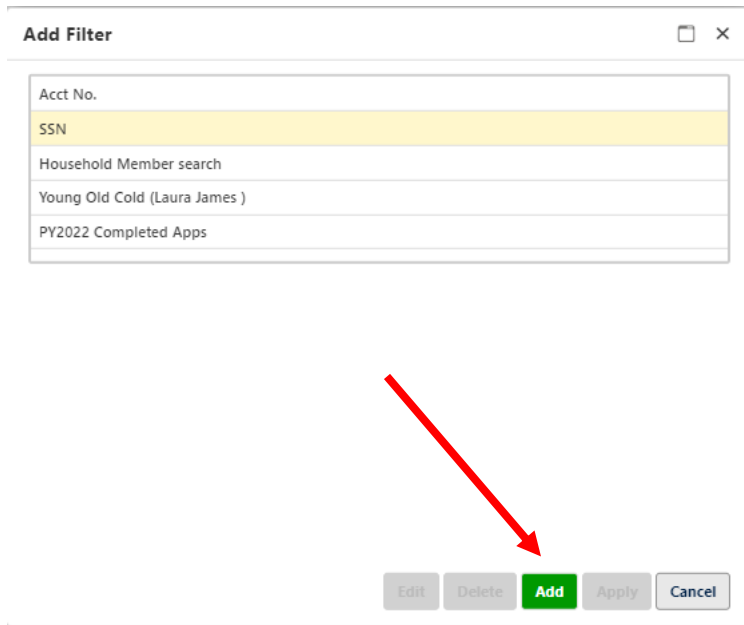
Click on 'Filters' from the Application Screen.



| Client Number | Address Status | Application Status | First Name | Last Name | Applied Date | Service Street Address | Service Apartment | Service City | Service ZIP | Phone |
|---------------|----------------|---------------------|------------|-----------|--------------|------------------------|-------------------|--------------|-------------|-----------|
| 556220355 | Unverified | Online Submitted | Jamie | Test2 | 6/27/2022 | 18 Park Street | 1 | Portland | 04104 | (207) 86 |
| 273955398 | Unverified | Application pending | | | 6/24/2022 | 292 Goodwins Mill ... | | Alfred | 04002 | (207) 60 |
| 1396415860 | Unverified | Qualify Failure | | | 6/22/2022 | 5588 Intake Street | | Augusta | 04330 | (207) 44 |
| 1021781195 | Unverified | Application pending | Jane | MH | 6/22/2022 | | | Abbot | | |
| 1279457743 | Address App... | Application pending | Kimberly | MH | 6/22/2022 | 123 Red Light | | Plymouth | 04969 | (207) 34 |
| 117685303 | Unverified | Application pending | Kendra | MH | 6/22/2022 | 41 Tainter Corner R... | | Carthage | 04224 | (207) 36 |
| 0000821482 | Unverified | Application pending | Amanda | MH | 6/22/2022 | 235 High Street | Apt B | Belfast | 04915 | (207) 32 |
| 984672538 | Verified | Online Submitted | JAMES | Clark | 6/20/2022 | 59 Stage Coach Rd | | Peru | 04290 | (875) 87 |
| 569840372 | Unverified | Application pending | Melissa | Taylor | 6/17/2022 | 135 Ktichen Mill Ro... | | Greenbush | 04418 | (845) 47 |
| 735769965 | Unverified | Application pending | Mary | Yu | 6/17/2022 | dsdfsdfsdf | | 04462 | 12345 | (111) 111 |

The 'Add' button will highlight in green.

Click 'Add'.



Add Filter

- Acct No.
- SSN**
- Household Member search
- Young Old Cold (Laura James)
- PY2022 Completed Apps

Edit Delete **Add** Apply Cancel

Enter a name for the filter in the Filter Name field.

Add Filter ☐ ×

Provide filter name

And +

Organization Default Public

Save Delete Cancel Apply

To add criteria to the filter, click the green plus sign (+) next to 'And'.

Add Filter ☐ ×

Ready to Certify

And +

Organization Default Public

Save Delete Cancel Apply

The options given will be 'Add Condition' and 'Add Group'.

- Add Condition will allow you to add any field from the Application to your filter.
- Add Group will allow you to add/change the 'And' box to an 'Or. (Example: Instead of filtering for Field 1 and Field 2 you can filter for Field 1 or Field 2)

Add Filter ×

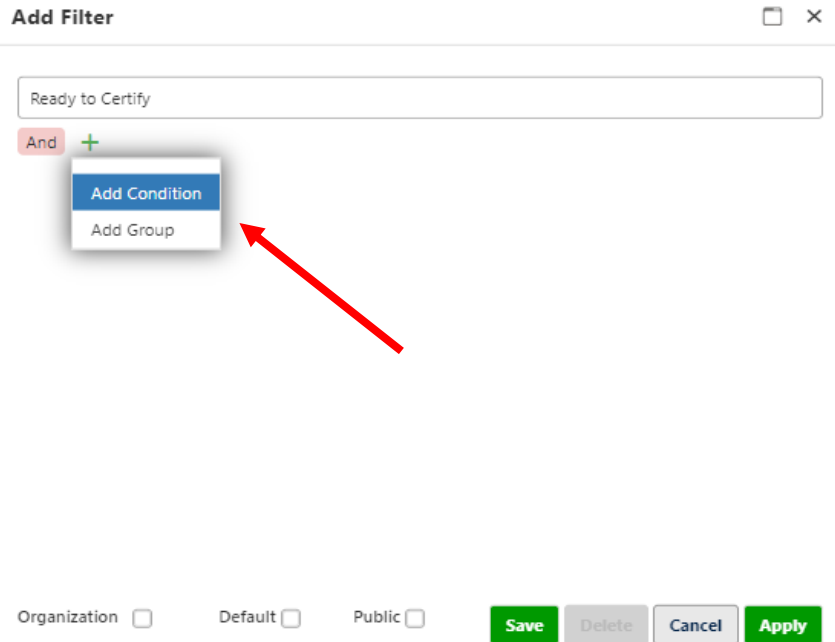
Ready to Certify

And +

- Add Condition
- Add Group

Organization Default Public

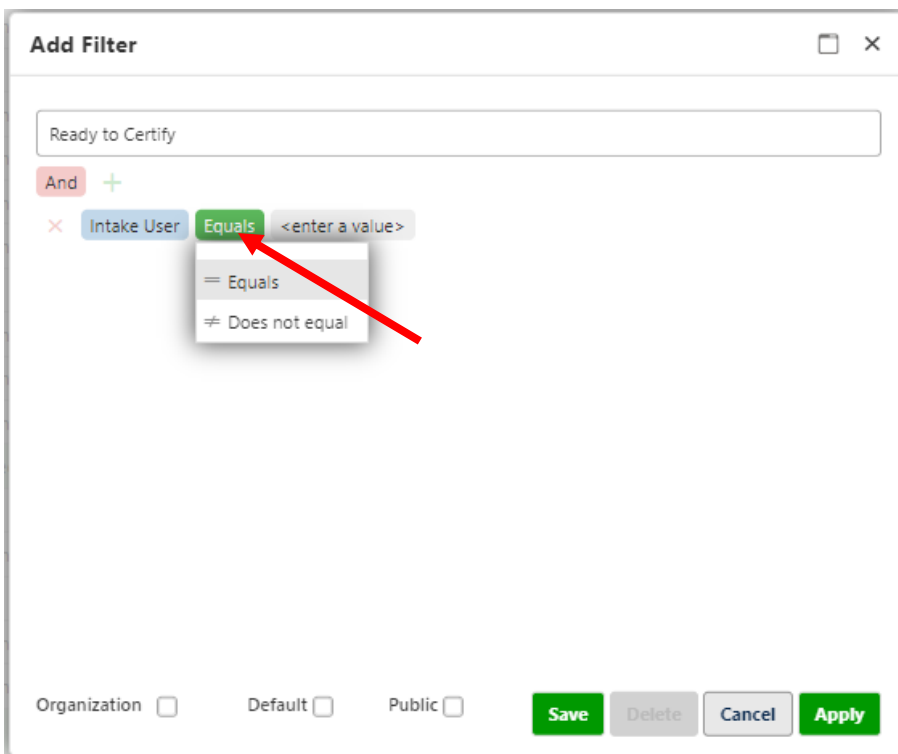
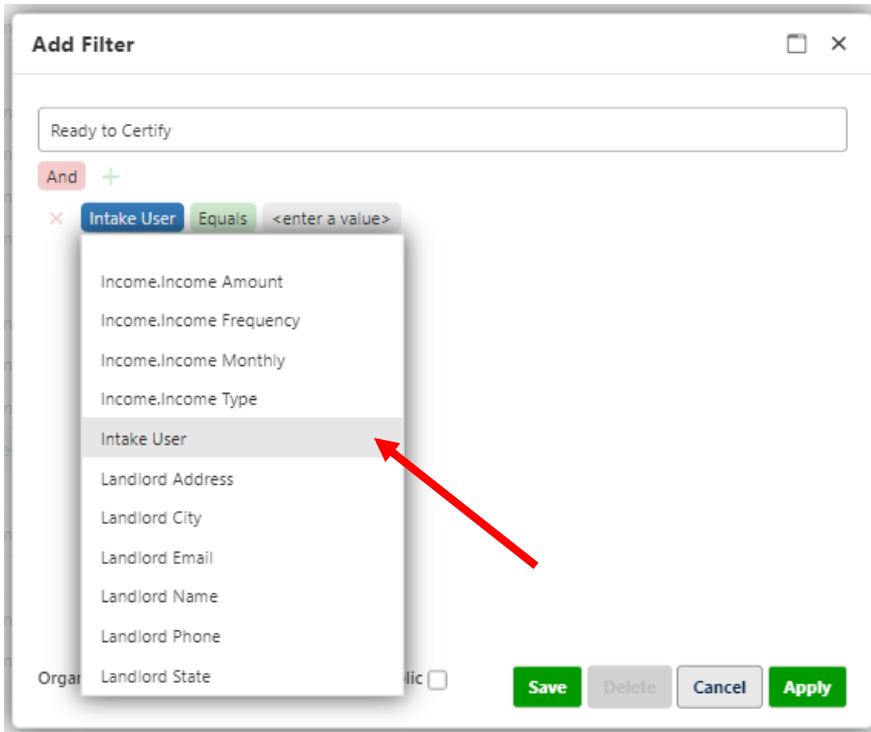
Save **Delete** **Cancel** **Apply**



When adding a Condition, three (3) colored bubble options will appear. By clicking on each bubble, you can change the selection in that bubble

- Blue is the **Field Name**
- Green is the **Criteria** for how the Value you are filtering on appears in the applicable Field.
- Grey is the **Value** for the applicable Field Name that is being added to the Filter.

Select/enter information into each bubble to create the parameters of your filter.



Ready to Certify

And +

Allocation.Benefit Amount Equals <enter a value>

Organization Default Public

Save Delete Cancel Apply

Ready to Certify

And +

Intake User Equals Lori McPherson (testinglo)

Allocation.Benefit Amount Equals <enter a value>

Organization Default Public

Save Delete Cancel Apply

The combination of the three bubbles will be now be included in the Filter parameters.

By clicking on the green plus sign (+) again, a new row can be added to include additional criteria in the filter. Since the red box reflects 'And', the filter will result in only Applications that include BOTH (or all) criteria entered.

Once all rows are entered, click 'Save' to save the filter for future use.

Click 'Apply' to run the filter on the Applications listed on the Client Screen.

Edit Filter

Ready to Certify

And +

Intake User Equals Lori McPherson (testinglori)

Application Status Equals Eligible, benefit determine

Click the plus sign to add a new row of criteria. Follow the steps above to fill in each bubble.

Click Save to save the filter for future use.

To share filter within Agency select check Organization

Click Apply to Apply the filter to the Applications listed on the Client Screen.

Organization Default Public

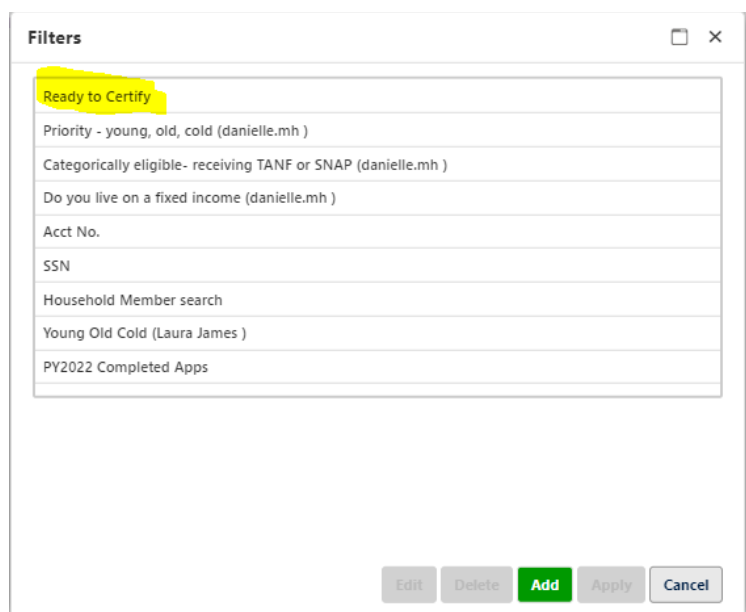
Save Delete Cancel Apply

Note: When using a Group (And/Or), the conditions associated with that Group will be listed below the Group. In the screen shot above, the filter is searching on the Intake user and the Application Status. If the Red ‘And’ was changed to ‘Or’, you would be searching for the Intake User or the Application Status.

The Client Screen will now show only the Applications that apply to the criteria listed in the Filter used.

| Client Number | Address Status | Intake User | Application Status | First Name | Last Name | Applied Date | Certified Date | Certifier | Service Street Address | Service Apartm |
|---------------|----------------|-----------------|------------------------------|------------|-----------|--------------|----------------|-----------|------------------------|----------------|
| 1120236288 | Verified | Lori McPhers... | Eligible, benefit determined | Phillip | MH | 7/5/2022 | | | 90 Copeland Hill R... | |
| 0000797609 | Verified | Lori McPhers... | Eligible, benefit determined | Sherri | MH | 7/1/2022 | | | 379 Newfield Road | |

After saving, the Filter Name will now be listed in the Filter pop up for future use.



The screenshot shows a window titled "Filters" with a close button (X) in the top right corner. Inside the window, there is a list of filters. The first filter, "Ready to Certify", is highlighted in yellow. The other filters in the list are: "Priority - young, old, cold (danielle.mh)", "Categorically eligible- receiving TANF or SNAP (danielle.mh)", "Do you live on a fixed income (danielle.mh)", "Acct No.", "SSN", "Household Member search", "Young Old Cold (Laura James)", and "PY2022 Completed Apps". At the bottom of the window, there are five buttons: "Edit", "Delete", "Add", "Apply", and "Cancel". The "Add" button is highlighted in green.

NOTES:

- You are able to filter for demographics regarding ANY member of the Household; not only the Primary Applicant.
- After using a filter, click 'Clear Search' to take the filter. Otherwise, you will not see all of the applications in HEAP Cloud.