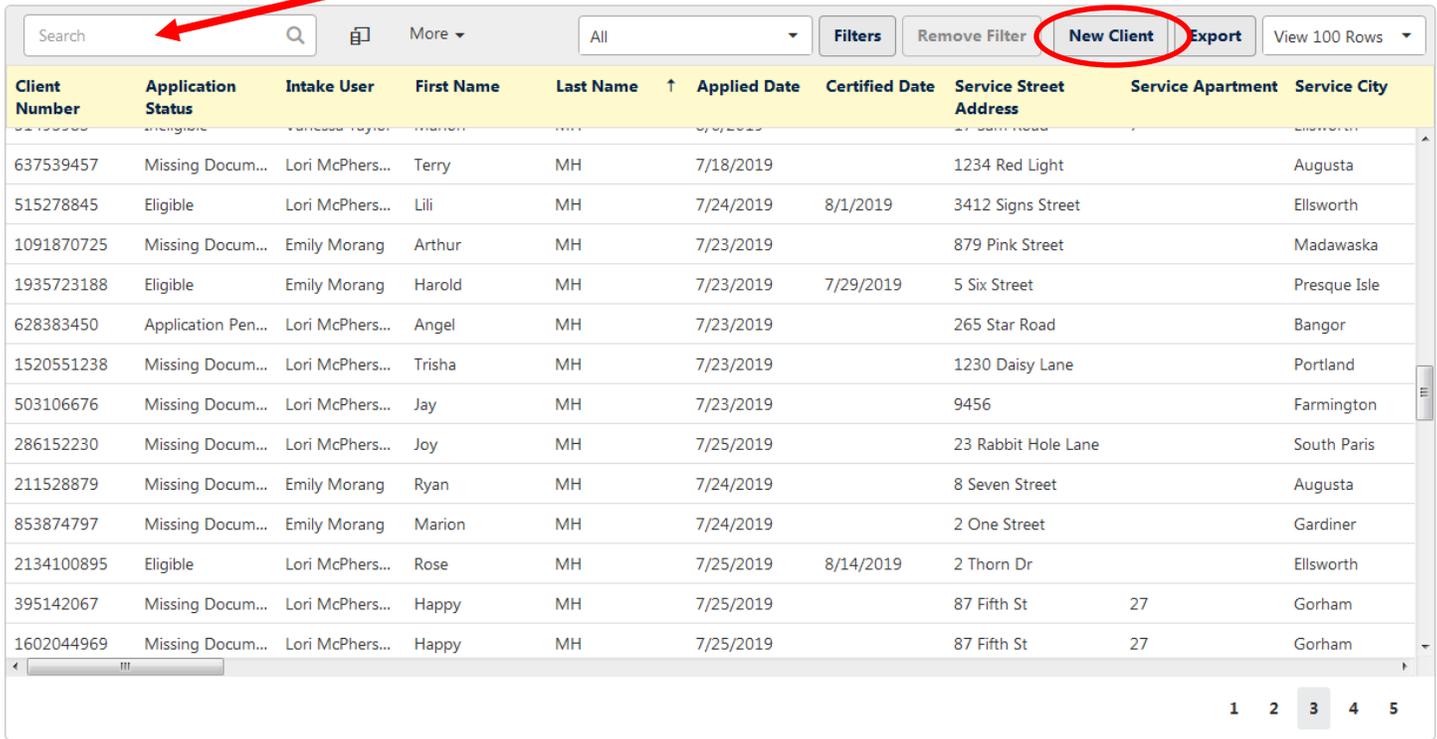


# How to Complete an Application in HEAP Cloud

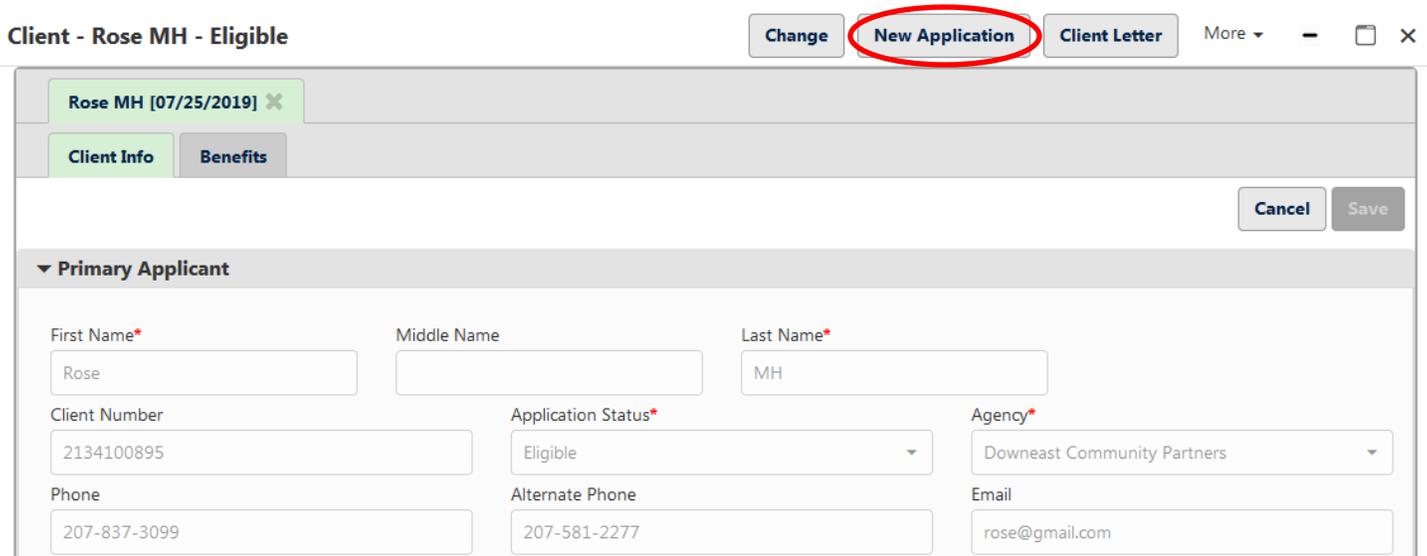
Upon logging in to HEAP Cloud, you will see the Client Screen below.

To start an application for someone who has not previously applied, click on the 'New Client' button to the top right side of the screen.



Client Number	Application Status	Intake User	First Name	Last Name	Applied Date	Certified Date	Service Street Address	Service Apartment	Service City
637539457	Missing Docum...	Lori McPhers...	Terry	MH	7/18/2019		1234 Red Light		Augusta
515278845	Eligible	Lori McPhers...	Lili	MH	7/24/2019	8/1/2019	3412 Signs Street		Ellsworth
1091870725	Missing Docum...	Emily Morang	Arthur	MH	7/23/2019		879 Pink Street		Madawaska
1935723188	Eligible	Emily Morang	Harold	MH	7/23/2019	7/29/2019	5 Six Street		Presque Isle
628383450	Application Pen...	Lori McPhers...	Angel	MH	7/23/2019		265 Star Road		Bangor
1520551238	Missing Docum...	Lori McPhers...	Trisha	MH	7/23/2019		1230 Daisy Lane		Portland
503106676	Missing Docum...	Lori McPhers...	Jay	MH	7/23/2019		9456		Farmington
286152230	Missing Docum...	Lori McPhers...	Joy	MH	7/25/2019		23 Rabbit Hole Lane		South Paris
211528879	Missing Docum...	Emily Morang	Ryan	MH	7/24/2019		8 Seven Street		Augusta
853874797	Missing Docum...	Emily Morang	Marion	MH	7/24/2019		2 One Street		Gardiner
2134100895	Eligible	Lori McPhers...	Rose	MH	7/25/2019	8/14/2019	2 Thorn Dr		Ellsworth
395142067	Missing Docum...	Lori McPhers...	Happy	MH	7/25/2019		87 Fifth St	27	Gorham
1602044969	Missing Docum...	Lori McPhers...	Happy	MH	7/25/2019		87 Fifth St	27	Gorham

To start an application for someone who has previously applied, search for and open the person's previous application from the Client Screen (above) and then click on the 'New Application' button on the top right side of the screen.



Client - Rose MH - Eligible

Change **New Application** Client Letter More ▾

Rose MH [07/25/2019] ✕

Client Info Benefits

Cancel Save

▼ Primary Applicant

First Name\* Middle Name Last Name\*

Rose

Application Status\* Agency\*

2134100895 Eligible Downeast Community Partners

Phone Alternate Phone Email

207-837-3099 207-581-2277 rose@gmail.com

By clicking either the 'New Client' or 'New Application' buttons, you will begin the application. For New Clients, the system will auto generate a Client Number which cannot be changed.

The first section to complete will be the 'Primary Applicant' section shown below. Enter all applicable information regarding the Primary Applicant. Fields designated with a red asterisk (\*) are required fields and must be completed in order to process the Application.

Note: If an application is being completed for someone who has previously applied, most fields will be populated with the previous applications information; however, each field will be highlighted yellow. Each field must be reviewed for accuracy and updated as needed. As you tab through each field the yellow highlight will be removed. All other fields must be filled in as they would be for a new applicant.

**Client - Rose MH - Application pending** New Application Client Letter More ▾ ✕

Rose MH [08/26/2019] ✕

**Client Info** **Benefits** **History**

Please verify each field by moving to each field and checking its value. Cancel Save

▼ **Primary Applicant**

First Name*	Middle Name	Last Name*
Rose		MH
Client Number	Application Status*	Agency*
2134100895	Application pending	Downeast Community Partners
Phone	Alternate Phone	Email
207-837-3099	207-581-2277	rose@gmail.com

If the Household's mailing and physical addresses are the same, click the 'Mailing Same as Service Address' box. This will autofill the mailing address fields.

**New Client** ✕

**Client Info**

Cancel Save

▼ **Primary Applicant**

First Name*	Middle Name	Last Name*
Jesse		MH
Client Number	Application Status*	Agency*
	Application pending	Aroostook County Action Program
Phone	Alternate Phone	Email
(207) 555-1212		jmh@gmail.com
Service Street Address*	Service Apartment	
1234 Red Light Lane		
Service Address 2	County*	
	Aroostook	
Service City*	Service State*	Service ZIP*
Presque Isle	ME	04740
<b>Mailing Same As Service Address</b> <input checked="" type="checkbox"/>	Mailing Apartment	
Mailing Street Address		
1234 Red Light Lane		
Mailing Street 2		
Mailing City	Mailing State	Mailing ZIP
Presque Isle	ME	04740

Once the 'Primary Applicant' section is complete, move on to the 'Application' section.

Each section of the Application can be opened and closed by clicking on the triangle immediately preceding the section header. You can close each section once completed or keep them open throughout the application process; whichever is preferred.

Fields that are greyed out, such as Approval Status and Intake User, will be autopopulated and cannot be changed.

If the 'Owner Type' is Rent, the Landlord Information must be filled in.

If the Household receives a subsidy towards their rent OR mortgage, click the 'Subsidized Housing' box.

If the Household's rent includes heat, click the 'Heat in Rent' box.

If the Household's rent includes electricity, click the 'Electricity in Rent' box.

If the Household requests LIAP, click the 'Request LIAP' box.

The screenshot shows a web application interface for a 'New Client'. The 'Client Info' section is expanded, and the 'Application' section is also expanded. The 'Application' section contains the following fields:

- Application Method\*: In Office (dropdown)
- Applied Date\*: 8/25/2019 (calendar icon)
- Owner Type\*: Own (dropdown)
- Number Of Rooms\*: 5 (text input)
- DwellingType\*: Stick-built/Modular (dropdown)
- Landlord Name (text input)
- Landlord Phone (text input)
- Landlord Email (text input)
- Landlord Address (text input)
- Landlord City (text input)
- Landlord State (text input)
- Landlord ZIP (text input)
- Subsidized Housing
- Heat in Rent
- Electricity in Rent
- Request LIAP
- Active
- Approval Status: none (dropdown)
- Approval Date (text input)
- Intake User: Lori McPherson (text input)
- Created Date: 8/25/2019 (calendar icon)
- Certifier (text input)
- Certified Date (text input)

The 'Request LIAP' checkbox is checked, and a red oval highlights it. A red circle highlights the 'Application' section header.

The next section to complete is the 'Family' section.

When the section is first opened, there will be no family members listed. To populate the Primary Applicant in the grid, click 'New'.

New Client

New Application Client Letter More - □ ×

New Client ✕

Client Info

Cancel Save

Primary Applicant

Application

Family

First Name	Middle Name	Last Name	Date of Birth	Gender	Medical Insurance	Marital Status	Education	Children 0-2	Children 3-5	Children 6-17
There are no records available.										

Children 0-2 Children 3-5 Children 6-17

Elderly Disabled Occupants

A Family box will pop up to enter the demographics in for the Primary Applicant.

Although the SSN/Alien # field does not have a red asterisk, it is required for all Household members over 2 years of age.

Once the Primary Applicant's information has been entered, click 'Save' to save the data and close the pop up box.

Family □ ×

First Name\* Middle Name Last Name\*

Jesse

Date of Birth\* SSN/Alien # Gender\*

1/25/1969 000-00-3456 Male

Medical Insurance\* Marital Status\* Education\*

Private Single 12

Children 0-2 Children 3-5 Children 6-17

Elderly Uncounted

Primary Applicant

Demographic Name	Active
Native American	<input type="checkbox"/>
Emancipated Minor	<input type="checkbox"/>
Disabled	<input type="checkbox"/>
Hypothermia Risk	<input type="checkbox"/>

Cancel Save

After the pop up box saves and closes, you will see the Primary Applicant's demographics in the Family section grid.

Click 'New' to add additional Household members, as you did for the Primary Applicant.

Client - Jesse MH - Application pending

New Application Client Letter More - X

Jesse MH [08/25/2019] X

Client Info Benefits History

Please verify each field by moving to each field and checking its value. Cancel Save

Primary Applicant

Application

Family

<input type="checkbox"/>	First Name	Middle Name	Last Name	Date of Birth	Gender	Medical Insurance	Marital Status	Education	Children 0-2	Children 3-5	Children 6-17
<input type="checkbox"/>	Jesse		MH	1/25/1969	Male	Private	Single	12			

Children 0-2: 0  
Elderly: 0

Children 3-5: 0  
Disabled: 0

Children 6-17: 0  
Occupants: 1

Income

Additional Household members will need all of the same information entered as the Primary Applicant. However, the 'Primary Applicant' check box will not be selected.

### Family

First Name\* David  
Middle Name  
Last Name\* MH  
Date of Birth\* 5/23/2010  
SSN/Alien # \*\*\*\*\*1234  
Gender\* Male  
Medical Insurance\* Private  
Marital Status\* Single  
Education\* 4  
Children 0-2   
Children 3-5   
Children 6-17   
Elderly   
Uncounted   
Primary Applicant

Demographic Name	Active
Native American	<input type="checkbox"/>
Emancipated Minor	<input type="checkbox"/>
Disabled	<input type="checkbox"/>
Hypothermia Risk	<input type="checkbox"/>

Cancel Save

Once all Household members are entered, they will all appear in the Family section grid. The demographics section below the grid will display the appropriate demographic information for the Household.

Client Info Benefits History

Please verify each field by moving to each field and checking its value. Cancel Save

Primary Applicant

Application

Family

First Name	Middle Name	Last Name	Date of Birth	Gender	Medical Insurance	Marital Status	Education	Children 0-2	Children 3-5	Children 6-17
Jesse		MH	1/25/1969	Male	Private	Single	12			
David		MH	5/23/2010	Male	Private	Single	4			

Children 0-2: 0  
Elderly: 0  
Children 3-5: 0  
Disabled: 0  
Children 6-17: 1  
Occupants: 2

Income

The next section to complete is the 'Income' section.

Select the Income Period in the first drop down. For standard Applications, the Household can choose 3 Months or 12 Months. The 30 Days and 1 Month options can only be selected on an ECIP Only Application.

Since the Annual Income and Poverty Level fields are greyed out, they will be auto populated.

To add income for a Household member, click 'New'.

Client - Jesse MH - Application pending New Application Client Letter More - [ ] [X]

Client Info Benefits History

Please verify each field by moving to each field and checking its value. Cancel Save

Primary Applicant

Application

Family

Income

Income Period\* 3 Months Annual Income 0.00 Poverty Level 0

Income Checks	Family Member	Income Type	Income Amount	Income Frequency	Income Monthly
There are no records available.					

Remove New

An Income box will pop up. Select the name of Household member receiving the income in the Family Member drop down. The Date of Birth will also appear in case there are Household members with the same name.

Select the appropriate Income Type, Income Amount and Income Frequency in the corresponding drop down fields.

Note: You will not need to total the income for the entire Income Period and enter as one amount (Example: If Household member receives \$500.00 Social Security, enter \$500.00 Monthly instead of \$1500.00 Quarterly), except in the case of fluctuating Wages. Wages will need to be totaled for the entire Income Period and entered as one amount using the Income Period as the Income Frequency.

The Monthly Income will be auto populated, based on the information that is entered.

Once the Household member's income information has been entered, click 'Save' to save the data and close the pop up box.

The screenshot shows a form titled "Income" with the following fields and values:

- Family Member\*: Jesse 01/25/1969
- Income Amount\*: \$85.50
- Income Monthly: \$1,918.58
- Income Type\*: Wages and Salary
- Income Frequency\*: Bi-weekly

Buttons for "Cancel" and "Save" are located at the bottom right, with "Save" circled in red.

After the pop up box saves and closes, you will see the Income that was entered listed in the Income section grid.

Click 'New' to add additional Income rows to the Income section grid. Each Household member over the age of 18 years must have an Income row listed, even if they have zero income.

The screenshot shows the "Client - Jesse MH - Application pending" screen. The "Income" section is expanded, showing the following summary information:

- Income Period\*: 3 Months
- Annual Income: 23023.00
- Poverty Level: 136

Below this is a table with the following data:

Income Checks	Family Member	Income Type	Income Amount	Income Frequency	Income Monthly
<input type="checkbox"/>	Jesse 01/25/1969	Wages and Salary	\$885.50	Bi-weekly	\$1,918.58

Buttons for "Remove" and "New" are located at the top right of the table, with "New" circled in red.

Once all Household Income has been entered, move on to the 'Vendor and Consumption' section.

In the first drop down, enter the Primary Fuel Type. This does not need to be the Fuel Type for which the benefit is issued. It must be the Primary Fuel Type for the Household, meaning which ever Fuel Type the Household uses most and spends the most money on.

The first grid is to document permanently installed Heating Systems. Click 'New' to add a system.

Jesse MH [08/25/2019] X

Client Info Benefits History

Please verify each field by moving to each field and checking its value. Cancel Save

Primary Applicant

Application

Family

Income

Vendor and Consumption

Primary Fuel Type\*

Oil

Remove New

Heating System Location	System and Fuel Type	Priority	Condition	Check if this system been cleaned in the last 12 months
There are no records available.				

A Heating System pop up box will appear.

Enter the Heating system location in the free text field (Ex. Basement, Living Room, Attic, etc.).

Select the appropriate System and Fuel Type, Priority and Condition from the drop downs.

Priorities cannot be duplicated, if there are multiple Heating Systems.

If the Heating System has been cleaned in the past 12 months, click the check box.

Once all fields are entered, click 'Save' to save the data and close the pop up box.

### Heating System

Heating System Location: Basement

System and Fuel Type: Boiler - Oil

Priority: Primary

Condition: Working Well

Check if this system been cleaned in the last 12 months:

Cancel Save

After the pop up box saves and closes, you will see the Heating System information in the Heating System grid.

Click 'New' to add additional Heating Systems. All permanently installed Heating Systems in the Dwelling must be entered.

The second grid in the Vendor and Consumption section is Fuel Vendors. To add a Fuel Vendor, click 'New'.

Client - Jesse MH - Application pending

New Application Client Letter More - □ ×

Jesse MH [08/25/2019] ×

Client Info Benefits History

Cancel Save

▼ Vendor and Consumption

Primary Fuel Type\*  
Oil

<input type="checkbox"/>	Heating System Location	System and Fuel Type	Priority	Condition	Check if this system been cleaned in the last 12 months
<input checked="" type="checkbox"/>	Basement	Boiler - Oil	Primary	Working Well	<input checked="" type="checkbox"/>
<input type="checkbox"/>	Livingroom	Stove - Wood Pellets	Secondary	Working Well	<input type="checkbox"/>

Remove New

<input type="checkbox"/>	Fuel Vendor	Account Number	First Name	Last Name	Same As Applicant	Annual Consumption	Fuel Subsidy Allowance	Use DHLC	DHLC Reason
There are no records available.									

New

A Fuel Vendor (Energy Consumption) pop up box will appear.

Select the Fuel Vendor name with the corresponding fuel type in the first drop down field.

Enter the account number in the free text Account Number field.

Enter the First and Last Names listed on the account with the Vendor OR click 'Same as Applicant' to autofill the fields with the Primary Applicant's name.

The Annual Consumption field is greyed out and is auto populated with the Households prior year consumption, if available. If for any reason the Household's benefit should be calculated using DHLC (Design Heat Load Calculation), check the 'Use DHLC' box and select the appropriate DHLC Reason from the drop down.

The Heating Burden field is greyed out and will be auto populated.

An 'Energy Service Status' grid is at the bottom of the Energy Consumption pop up box. This is a required field.

Click 'New' to enter an Energy Service Status. The date will be auto populated. Choose the appropriate Fuel Status from the drop down to indicate the Household's Energy Service Status as of the Date of Application.

Click 'Save' to save the data and close the pop up box.

### Energy Consumption

Fuel Vendor\*  
Daigle Oil Company-Presque Isle - Oil

Account Number\*  
123456

First Name  
Jesse

Last Name  
MH

Same As Applicant

Annual Consumption  
2816.96

Fuel Subsidy Allowance

Use DHLC

DHLC Reason  
No Consumption figure available

Comment

Heating Burden  
2816.96

Utility Only

### Energy Service Status

Remove **New**

Date	Fuel Status	Current Status
8/25/2019	No Energy Crisis - Not Applicable - None	<input checked="" type="checkbox"/>

3 days or less - Prevented - Energy Crisis  
Out of Fuel - Restored - Life Threatening  
No Energy Crisis - Not Applicable - None

Link Consumption Cancel **Save**

After the pop up box saves and closes, you will see the Fuel Vendor information in the Fuel Vendor grid.

Click 'New' to add additional Fuel Vendors, including the Household's electricity Vendor.

### Client - Jesse MH - Application pending

New Application Client Letter More -

Jesse MH [08/25/2019] X

Client Info Benefits History

Cancel Save

Heating System Location	System and Fuel Type	Priority	Condition	Check if this system been cleaned in the last 12 months
<input type="checkbox"/> Basement	Boiler - Oil	Primary	Working Well	<input checked="" type="checkbox"/>
<input type="checkbox"/> Livingroom	Stove - Wood Pellets	Secondary	Working Well	<input type="checkbox"/>

**New**

Fuel Vendor	Account Number	First Name	Last Name	Same As Applicant	Annual Consumption	Fuel Subsidy Allowance	Use DHLC	DHLC Reason
<input type="checkbox"/> Daigle Oil Company-Presque Isle - Oil	123456	Jesse	MH	<input checked="" type="checkbox"/>	\$2,816.96		<input checked="" type="checkbox"/>	No Consumption fig...

Remove

Questions	Answer
<input type="checkbox"/> Does your electric meter service only your dwelling?	
<input type="checkbox"/> Does your primary fuel tank supply only your dwelling?	
<input type="checkbox"/> Is your primary fuel tank outside or in an unheated space?	
<input type="checkbox"/> What is the primary fuel tank size in gallons?	
<input type="checkbox"/> Has your chimney been cleaned in the last 12 months?	

When entering the electricity Vendor, click the 'Utility Only' check box if the Vendor is used only for utilities.

The Energy Service Status must also be completed as of the Date of Application; however, the Fuel Status options refer to the electric status.

**Energy Consumption**

Fuel Vendor\*  
Emera Maine-MPD - Electric

Account Number\*  
0000012345687

First Name  
Jesse

Last Name  
MH

Same As Applicant

Annual Consumption  
0.00

Fuel Subsidy Allowance

Use DHLC

DHLC Reason

Comment

Heating Burden  
0.00

Utility Only

**Energy Service Status**

Date	Fuel Status	Current Status
8/25/2019	No Energy Crisis - Not Applicable - None	<input checked="" type="checkbox"/>

Disconnected - Restored - Life Threatening  
Past Due or shut-off notice - Prevented - Energy Crisis  
No Energy Crisis - Not Applicable - None

Link Consumption Cancel Save

After the pop up box saves and closes, you will see the Fuel Vendor information in the Fuel Vendor grid.

The bottom section of the Vendor and Consumption section is Questions and Answers regarding the Household's Heating System. To begin the questions, double click directly on the first question.

**Client - Jesse MH - Application pending**

New Application Client Letter More

Jesse MH [08/25/2019]

Client Info Benefits History

Cancel Save

Heating System Location	System and Fuel Type	Priority	Condition	Check if this system been cleaned in the last 12 months
<input type="checkbox"/> Basement	Boiler - Oil	Primary	Working Well	<input checked="" type="checkbox"/>
<input type="checkbox"/> Livingroom	Stove - Wood Pellets	Secondary	Working Well	<input type="checkbox"/>

**Fuel Vendor**

Fuel Vendor	Account Number	First Name	Last Name	Same As Applicant	Annual Consumption	Fuel Subsidy Allowance	Use DHLC	DHLC Reason	Comment	H E
<input type="checkbox"/> Dangle Oil Company- Presque Isle - Oil	123456	Jesse	MH	<input checked="" type="checkbox"/>	\$2,816.96		<input checked="" type="checkbox"/>	No Consumption Hig...		\$2,
<input type="checkbox"/> Emera Maine-MPD - Electric	0000012345687	Jesse	MH	<input checked="" type="checkbox"/>	\$0.00		<input type="checkbox"/>			

**Questions**

Questions	Answer
<input type="checkbox"/> Does your electric meter service only your dwelling?	
<input type="checkbox"/> Does your primary fuel tank supply only your dwelling?	
<input type="checkbox"/> Is your primary fuel tank outside or in an unheated space?	
<input type="checkbox"/> What is the primary fuel tank size in gallons?	
<input type="checkbox"/> Has your chimney been cleaned in the last 12 months?	

A pop up will appear labeled 'Client Tracking Info'. All questions must be answered by 'Yes', 'No', 'NA' or a numerical value unless answer options are otherwise specified in parenthesis.

Once a question has been answered, click 'Next' to move on to the next question.

**Client Tracking Info** ☐ ×

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Questions

Does your electric meter service only your dwelling?

Answer

Yes

**Previous** **Next** **Cancel** **Save**



When the last question is reached, the 'Next' button will be greyed out.

Click 'Save' to save the data and close the pop up box.

**Client Tracking Info** ☐ ×

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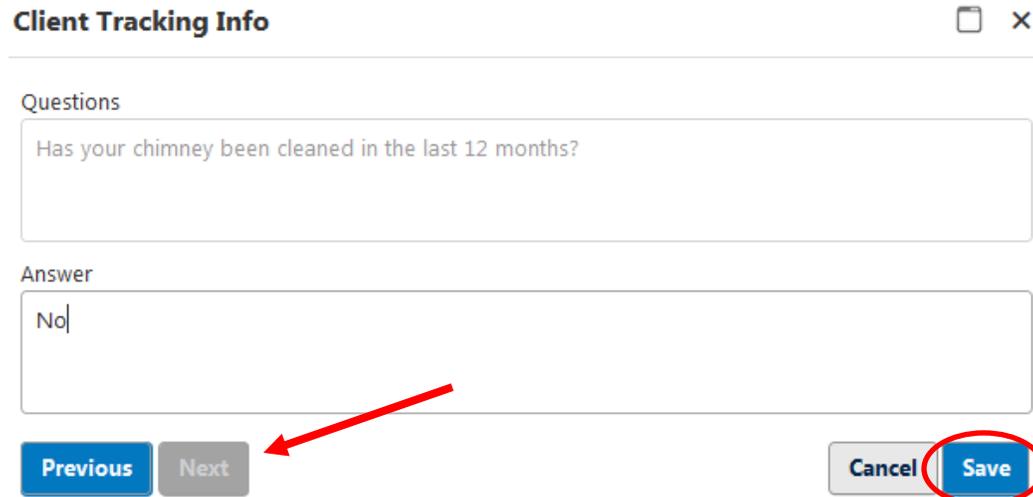
Questions

Has your chimney been cleaned in the last 12 months?

Answer

No

**Previous** **Next** **Cancel** **Save**



After the pop up box saves and closes, you will see the answers provided for each question in the Vendor and Consumption Questions and Answers grid.

The screenshot shows a web application window titled "Client - Jesse MH - Application pending". At the top right, there are buttons for "New Application" and "Client Letter", and a "More" dropdown menu. Below the title bar, there is a tabbed interface with "Client Info", "Benefits", and "History" tabs. The "Client Info" tab is active, showing a summary of the client's information: "Jesse MH [08/25/2019]", "Livingroom", "Stove - Wood Pellets", "Secondary", and "Working Well". Below this, there is a table of fuel vendors. The table has columns for "Fuel Vendor", "Account Number", "First Name", "Last Name", "Same As Applicant", "Annual Consumption", "Fuel Subsidy Allowance", "Use DHLC", and "DHLC Reason". Two vendors are listed: "Daigle Oil Company-Presque Isle - Oil" and "Emera Maine-MPD - Electric". Below the vendor table, there is a section titled "Questions and Answers" which is circled in red. This section contains a table with columns for "Questions" and "Answer". The questions and their answers are: "Does your electric meter service only your dwelling?" (Yes), "Does your primary fuel tank supply only your dwelling?" (Yes), "Is your primary fuel tank outside or in an unheated space?" (No), "What is the primary fuel tank size in gallons?" (275), and "Has your chimney been cleaned in the last 12 months?" (No).

Next is the Questions and Answers section. This section is a mixture of questions in regards to the Households Dwelling and living situation.

To begin the questions, double click directly on the first question.

The screenshot shows the same web application window as above, but with the "Questions and Answers" section expanded. The "Questions and Answers" section is now visible, showing a list of questions and their answers. A red arrow points to the first question: "Does anyone in your household currently receive general assistance?". The other questions and their answers are: "Does anyone in your household currently receive SNAP Benefits?", "Does anyone in your household currently receive MaineCare benefits?", "What is the approximate age (in years) of your dwelling?", "What is the condition of your dwelling? (good, fair, or poor)", and "Is your mobile home 12 feet wide by 40 feet long or larger?". Below the "Questions and Answers" section, there are sections for "Document" and "Comments".

A pop up box will appear labeled 'Questions and Answers'. All questions must be answered by 'Yes', 'No', 'NA' or a numerical value unless answer options are otherwise specified in parenthesis.

Once a question has been answered, click 'Next' to move on to the next question.

## Questions and Answers



### Questions

Does anyone in your household currently receive general assistance?

### Answer

No

Previous

Next

Cancel

Save

When the last question is reached, the 'Next' button will be greyed out.

Click 'Save' to save the data and close the pop up box.

## Questions and Answers



### Questions

Is your mobile home 12 feet wide by 40 feet long or larger?

### Answer

NA

Previous

Next

Cancel

Save

After the pop up box saves and closes, you will see the answers provided for each question in the Questions and Answers section.

Client - Jesse MH - Application pending

New Application

Client Letter

More



Jesse MH [08/25/2019]

Client Info

Benefits

History

Cancel

Save

### Vendor and Consumption

### Questions and Answers

Questions	Answer
Does anyone in your household currently receive general assistance?	No
Does anyone in your household currently receive SNAP Benefits?	Yes
Does anyone in your household currently receive MaineCare benefits?	No
What is the approximate age (in years) of your dwelling?	58
What is the condition of your dwelling? (good, fair, or poor)	Good
Is your mobile home 12 feet wide by 40 feet long or larger?	NA

The Documents section is next.

All documents listed in the grid must have a Document Status (Completed, Not Required, Missing) listed in order to Qualify & Confirm (Certify) the application.

Some Documents must have a file attached in order to Qualify & Confirm (Certify) depending on the Application Ownership Types.

To update a Document Status or attach a file, double click on the Document name.

The screenshot shows a web application window titled "Client - Jesse MH - Application pending". At the top right, there are buttons for "New Application" and "Client Letter", and a "More" dropdown menu. Below the title bar, there are tabs for "Client Info", "Benefits", and "History". A "Cancel" and "Save" button are visible on the right. The main content area is titled "Document" and contains a table with the following columns: "Attached File Name", "Document", "Document Status", "Comment", and "Revised Date". The table lists several documents, including "Permission to Share", "HEAP Additional Information Questi...", "Income Worksheet", "US Lawful Status Verification", and "Government issued photo ID". A red arrow points to the "Permission to Share" document. At the bottom right of the table, there are page numbers "1" and "2".

A pop up box will appear labeled 'Document'.

The Document name will auto populate depending on the Document type that you clicked on.

Select the Document Status from the drop downs. The Revised date will auto populate.

If a file will be attached, click 'Attach Document'.

The screenshot shows a "Document" pop-up window. It has a title bar with a close button. The form contains the following fields: "Document\*" with a dropdown menu showing "Permission to Share"; "Document Status\*" with a dropdown menu showing "Completed"; a "Comment" text area; "Revised Date" with a date input field showing "8/25/2019" and a calendar icon; and "Attached File Name :". At the bottom, there are three buttons: "Attach Document" (circled in red), "Cancel", and "Save".

Click 'Select File' to choose the attachment from your computer.

**Upload File** ✕

---

**Select file**

(25 MB Maximum)

**Cancel** **Upload**

Once the file is attached, the 'Attached File Name' will appear below the Revised Date. .

Click 'Save' to save the data and close the pop up box.

**Document** ☐ ✕

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Document\* Document Status\*

Permission to Share Completed

Comment

Revised Date

8/25/2019 📅

Attached File Name : [permission-to-share-information-08282017.pdf](#)

**Attach Document** **Remove Attachment** **Cancel** **Save**

Double click on each Document name to update the Document Status and attach files as necessary. If any Documents are labeled as 'Missing', enter a comment with details.

Client - Jesse MH - Application pending

New Application Client Letter More -

Jesse MH [08/25/2019]

Client Info Benefits History

Cancel Save

Primary Applicant

Application

Family

Income

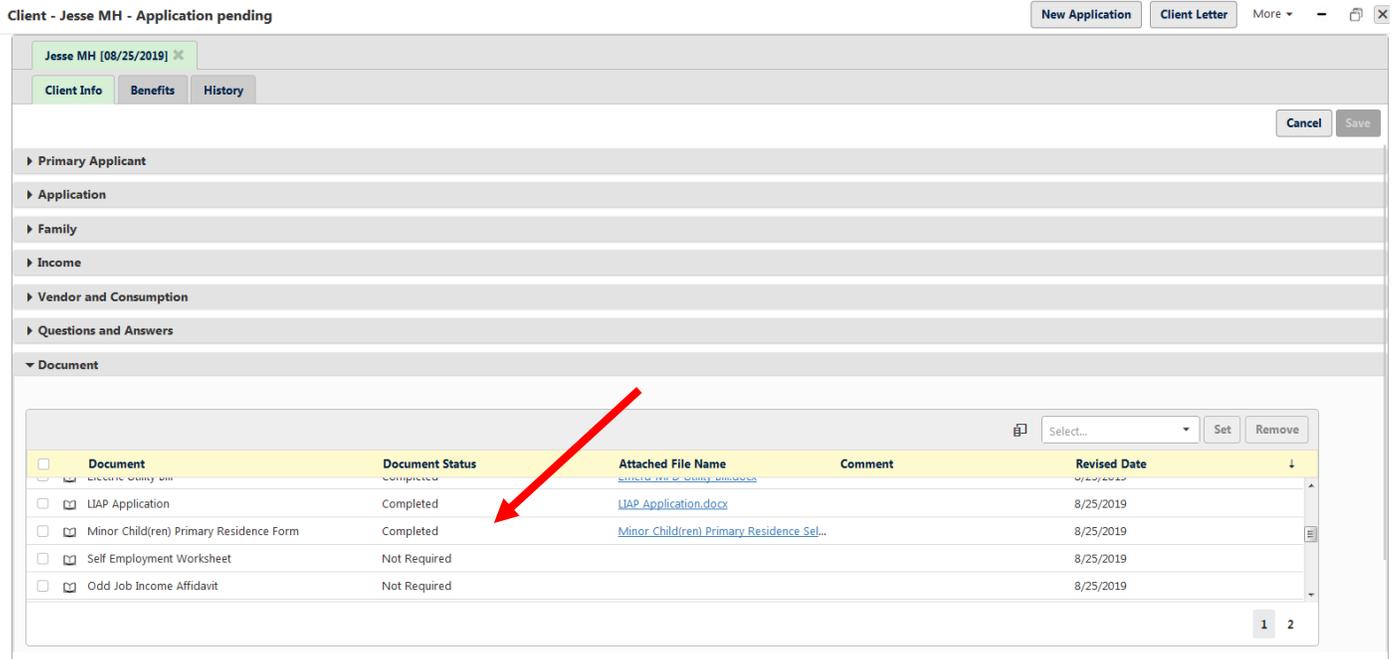
Vendor and Consumption

Questions and Answers

Document

Document	Document Status	Attached File Name	Comment	Revised Date
LIAP Application	Completed	<a href="#">LIAP Application.docx</a>		8/25/2019
Minor Child(ren) Primary Residence Form	Completed	<a href="#">Minor Child(ren) Primary Residence Sel...</a>		8/25/2019
Self Employment Worksheet	Not Required			8/25/2019
Odd Job Income Affidavit	Not Required			8/25/2019

1 2



The final section to complete during the application process is the Comments section.

Any relevant information that is gathered and not entered into the HEAP Cloud application through other fields, should be entered as a comment.

To enter a comment, click in the Comment box and type the message.

Click 'Save' in the top right corner to save the data. The date, time and name of the person entering the comment will be auto populated.

Client - Jesse MH - Application pending

New Application Client Letter More -

Jesse MH [08/25/2019]

Client Info Benefits History

Cancel Save

Document	Document Status	Attached File Name	Comment	Revised Date
Permission to Share	Completed	<a href="#">permission-to-share-information-0828...</a>		8/25/2019
HEAP Additional Information Questionnaire Form	Completed	<a href="#">HEAP Additional Questionnaire.pdf</a>		8/25/2019
Income Worksheet	Completed	<a href="#">income-worksheet-10302017.pdf</a>		8/25/2019
US Lawful Status Verification	Completed	<a href="#">US Lawful Status Verification.docx</a>		8/25/2019
Government issued photo ID	Completed	<a href="#">Government Issued Photo ID.docx</a>		8/25/2019

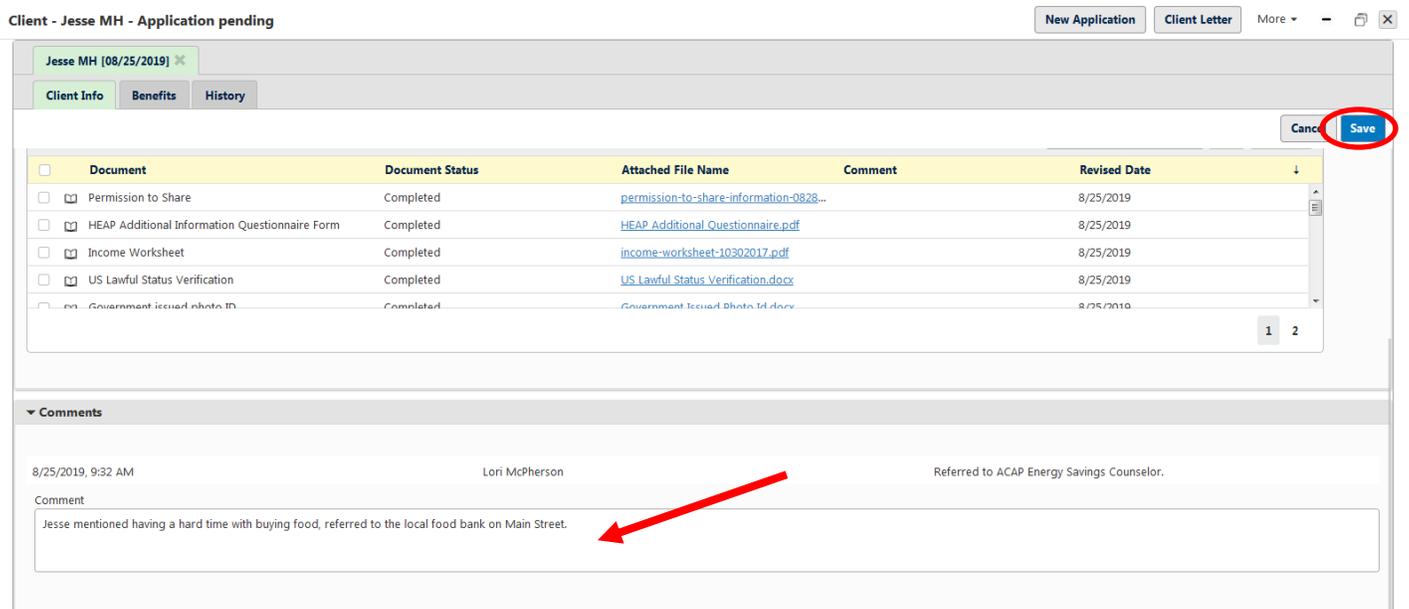
1 2

Comments

8/25/2019, 9:32 AM Lori McPherson Referred to ACAP Energy Savings Counselor.

Comment

Jesse mentioned having a hard time with buying food, referred to the local food bank on Main Street.



Once all eight (8) application sections have been completed, click on the 'Benefits' tab.

The screenshot shows a web application window titled "Client - Jesse MH - Application pending". At the top right, there are buttons for "New Application" and "Client Letter", along with a "More" dropdown menu and window control icons. Below the title bar, there is a header area with a tabbed interface. The tabs are "Client Info", "Benefits" (which is highlighted with a red circle), and "History". To the right of the tabs are "Cancel" and "Save" buttons. Below the tabs, there is a list of application sections, each with a right-pointing arrow: "Primary Applicant", "Application", "Family", "Income", "Vendor and Consumption", "Questions and Answers", "Document", "Comments", and "Change History".

The Benefits tab includes all information in regards to Benefits eligibility and amounts.

In order to Qualify & Confirm (certify), click on the 'Qualify' button. This will run the Rules set up in HEAP Cloud to determine if the Household is eligible for HEAP, TANF Supplemental or ECIP Benefits.

This screenshot shows the same application window, but now the "Benefits" tab is active. The "Qualify" button is highlighted with a red circle. To its right are "Confirm" and "Undo Confirm" buttons. Below the buttons, there is a "Denied" section with a checkbox and a "Denied Reason" dropdown menu showing "none". Below that is a "Qualified Allocation" section with a table header and a message "There are no records available." The table header has columns: "Allocation", "Benefit Date", "Benefit", "Additional Benefit", "Total Benefit", and "Needs Approval".

Allocation	Benefit Date	Benefit	Additional Benefit	Total Benefit	Needs Approval
There are no records available.					

Once the Qualify Rules have been run, Messages will appear in the Messages grid for each Allocation. The messages will either state that the Household is eligible for the allocation and the Benefit amount, that the Household is not eligible for the allocation OR what (if any) information is missing from the application in order to Qualify.

If the Household is eligible for a Benefit for an allocation, the Benefit amount will be listed in the Qualified Allocation grid. (Note: If the Benefit will be issued for the Secondary Fuel Type, see the document “How to Issue Benefits for a Secondary Fuel Type”)

Client - Jesse MH - Eligible, benefit determined

New Application Client Letter More

Jesse MH [08/25/2019]

Client Info Benefits History

Denied  Denied Reason: none

Qualified Allocation

Allocation	Benefit Date	Benefit	Additional Benefit	Total Benefit	Needs Approval
<input type="checkbox"/> 2020 TANF		\$350.00	\$0.00	\$350.00	NO
<input type="checkbox"/> 2020 HEAP		\$1,596.00	\$0.00	\$1,596.00	NO
<input type="checkbox"/> 2020 ECIP		\$0.00	\$0.00	\$0.00	NO

Messages

Allocation	Messages
2020 TANF	Eligible for \$350.00 from 2020 TANF (Family has at least one member who was under the age of 18, does not reside in Subsidized Housing with heat.)
2020 TANF	Benefit In Process
2020 HEAP	Eligible for \$1596.00 from 2020 HEAP ( Annually Energy Cost \$2501 and greater, Poverty 126%-150%)
2020 HEAP	Benefit In Process
2020 ECIP	Client required information check failed for Allocation Document Check, Client Allocation Document With Complete Status Check, ECIP Only applications may only use 30 day or 1 month income period
2020 ECIP	Needs document

If the Messages indicate that there are documents or information missing, the items can be added to or corrected on the application. Once complete, the Qualify button can be clicked again to run the Rules.

If the Messages indicate that the Household is eligible for a benefit, the Qualified Allocations can be Confirmed. Note: The Confirm process must be done by someone other than the person who did the Intake, except in the case of \$21.00 Heat & Eat Applications.

To Confirm, select the check boxes to the left of each Allocation that the Household is eligible for and then click ‘Confirm’.

Client - Jesse MH - Eligible, benefit determined

Buttons: New Application, Client Letter, More

Client Info | Benefits | History

Buttons: Qualify, **Confirm**, Undo Confirm

Denied  Denied Reason: none

**Qualified Allocation** [Print] [Add]

Allocation	Benefit Date	Benefit	Additional Benefit	Total Benefit	Needs Approval																								
<input checked="" type="checkbox"/> 2020 TANF		\$350.00	\$0.00	\$350.00	NO																								
<table border="1"> <thead> <tr> <th>Fuel Vendor</th> <th>Amount</th> <th>Benefit Quantity</th> <th>Benefit Balance</th> <th>Payment ID</th> <th>Apply Date</th> <th>Benefit Paid Date</th> <th>Credit Notification</th> <th>Comment</th> <th>PO Date</th> <th>PO Number</th> <th>Attach File</th> </tr> </thead> <tbody> <tr> <td>Daigle Oil Company-Presque Isle - Oil</td> <td>\$350.00</td> <td>134.19</td> <td>\$350.00</td> <td></td> <td>8/25/2019</td> <td></td> <td></td> <td></td> <td></td> <td></td> <td>PO +</td> </tr> </tbody> </table>						Fuel Vendor	Amount	Benefit Quantity	Benefit Balance	Payment ID	Apply Date	Benefit Paid Date	Credit Notification	Comment	PO Date	PO Number	Attach File	Daigle Oil Company-Presque Isle - Oil	\$350.00	134.19	\$350.00		8/25/2019						PO +
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<input checked="" type="checkbox"/> 2020 HEAP		\$1,596.00	\$0.00	\$1,596.00	NO																								
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Fuel Vendor	Amount	Benefit Quantity	Benefit Balance	Payment ID	Apply Date	Benefit Paid Date	Credit Notification	Comment	PO Date	PO Number	Attach File																		
Daigle Oil Company-Presque Isle - Oil	\$1,596.00	611.92	\$1,596.00		8/25/2019						PO +																		
<input type="checkbox"/> 2020 ECIP		\$0.00	\$0.00	\$0.00	NO																								

Once the Allocation(s) has been confirmed, the Message(s) will change from 'Benefit in Process' to 'Benefit Assigned'.

Client - Jesse MH - Benefit Applied

Buttons: Change, New Application, Client Letter, More

Client Info | Benefits | History

Buttons: Qualify, Confirm, Undo Confirm

Denied  Denied Reason: none

**Qualified Allocation** [Print] [Add]

Allocation	Benefit Date	Benefit	Additional Benefit	Total Benefit	Needs Approval
<input type="checkbox"/> 2020 TANF	8/25/2019	\$350.00	\$0.00	\$350.00	NO
<input type="checkbox"/> 2020 HEAP	8/25/2019	\$1,596.00	\$0.00	\$1,596.00	NO
<input type="checkbox"/> 2020 ECIP		\$0.00	\$0.00	\$0.00	NO

**Messages**

Allocation	Messages
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2020 HEAP	Benefit Assigned
2020 ECIP	Client required information check failed for Allocation Document Check, Client Allocation Document With Complete Status Check, ECIP Only applications may only use 30 day or 1 month income period
2020 ECIP	Needs document

The application is now Qualified & Confirmed (Certified). The Benefit is ready to be issued by MaineHousing.