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## ENTERING CAA HEAT PUMP JOBS IN HEAT ENTERPRISE

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### 1. Select Client

- a. Select the **CLIENT MANAGEMENT** menu option to access the **Client List**
- b. Select client to access the **Edit Client** screen
- c. Go to **Application** section and confirm/enter the following required fields
  - i. *Application Date* = See HEAP Cloud for eligible date
  - ii. *Certification Date* = Refer to HEAP Cloud for eligible date
  - iii. **Save**
- d. Go to **Energy Consumption** section
  - i. **Add** an Electric Utility (be sure *Heating* and *Cooling* are selected for the utility)
  - ii. **Save**

**NOTE:** If the client already has jobs associated to the record, the user will need to *Copy Application* and update the new Application data accordingly in order to create a new heat pump job.

### 2. Create Job

- a. Click **OPEN JOB** on the **Edit Client** screen to access the **AUDIT INFORMATION** screen
- b. Enter data the following required fields:
  - i. *Job Type* = Heat Pump
  - ii. *Auditor*
  - iii. *Assessment Date* = Date of initial client contact but no later than date client signed Consent
  - iv. *Audit Type* = Quick Audit
  - v. *Building Type* = Select from drop down
  - vi. *Year Built* = Enter year
  - vii. *Historic Preservation* = Defaults to 2a if dwelling is less than 50 years old, otherwise, manually select 2b
- c. Once the user clicks **Save**, *Job Status* will be "Scheduled"

### 3. Add Heat Pump Measure

- a. Click the **WEATHERIZATION>Heating/Cooling Dashboard** menu option to access the **HEATING/COOLING DASHBOARD** screen
- b. Click the **Add** button to access the **Heating Cooling System** screen and click **Add a New Heating&Cooling System** option
- c. Enter the required fields
  - i. *System Name* = Heat Pump
  - ii. *New System* = Measure 155-420-9000 Heat Pump Install by CAA
  - iii. *Unit Cost* = Defaults to "1"
  - iv. *Quantity* = Defaults to "1"
  - v. *Utility or Fuel Provider* = Electric Utility
  - vi. *Heating Usage Ratio* = Enter percentage (typical usage is 70%)
  - vii. *Cooling Usage Ratio* = Enter percentage (typical usage is 30%)
  - viii. *System Type* = Heat Pump
  - ix. *Heating Output* = Defaults to 12,000 BTU

*MaineHousing EHS staff will use measure "155-420-9100 Heat Pump Installed by EHS," and funding source "Heat Pump Installed by EHS."*

- x. *Cooling Output* = Defaults to 12,000 BTU
- xi. *Type* = Electric
- xii. *HSPF* = Defaults to 14
- xiii. *SEER* = Defaults to 30
- xiv. *Comments* = Enter other installation instruction/concerns here (*Example*: Prior approval is needed if costs exceed \$3,500 for complete installation, including thermostats and electrical work)
- xv. Click **Save**

**IMPORTANT:** CAAs must never assign heat pump installations to the EHS Heat Pump funding source. This funding source was created for the exclusive use of EHS staff for invoicing and tracking heat pump installed by EHS staff using the client record(s) assigned to the CAA. That means all MaineHousing-installed heat pumps will be visible on the client's Job List in HEAT Enterprise.

#### 4. Create/Print Work Order

- a. Go to **WAP > Audit Information** and change *Job Status* to "Audited" and **Save** (ignore "warnings" generated by the system not applicable to heat pump processing)
- b. Go to **WAP > Selected Measures** to access the **SELECTED MEASURES** screen
- c. Enter the following required fields:
  - i. *Funding Source* = CAA Heat Pump
  - ii. *Inspection Date* = LEAVE BLANK
  - iii. *Program Year* = 2021
  - iv. *Vendor* = Select vendor from list provided
  - v. Click **Set** button (ignore "warnings" regarding pricing at this time)

**NOTE:** Contact [HEATHelpDesk@mainehousing.org](mailto:HEATHelpDesk@mainehousing.org) to add vendor(s) not listed.

- d. Click **Generate Work Order** button to bring user to **Work Order Detail** screen
  - i. Enter *Work Order Date*
  - ii. Click **Save**

**NOTE:** *Job Status* has changed to "Generate Work Order"

- e. To print the Work Order, click **WORK ORDER > Work Order** menu option to go to the **Work Order Detail** screen
  - i. Select/Deselect *Include Costs* and *Photos*
  - ii. Click **Print** button

**NOTE:** The *Comments* entered when entering the measure on the **Heating & Cooling Dashboard** appear in the Work Order

#### 5. Install the Contractor Invoice

- a. Select **WORK ORDER > Installation** to access the **INSTALLATION** screen
- b. Select the applicable job by click the edit pencil to bring user to the **Installation Detail** screen
- c. On the **Information** tab enter the *Installation Date* = This must be the date the contractor invoice was received. (**Note:** Agencies have 30 days from the invoice receipt date to pay the contractor).
- d. Select the **Measures** tab click the pencil icon to adjust pricing and click **Save and Close**. *Job Status* changed to "Install"

#### 6. Inspect the Job

- a. Select the **WORK ORDER > Inspection** menu to access the **INSPECTION screen**
- b. Select the applicable job by click the edit pencil to bring user to the **Inspection Detail** screen
- c. On the **Information** tab enter the following:
  - i. *Scheduled Inspector* = Select inspector from the drop down option

- ii. *Date* = Enter the date the job was physically inspected. If the job was not physically inspected enter the date the agency intends to “pass/fail” the measure
- iii. *Comments* = Enter whether or not unit was physically inspected.

**NOTE:** All jobs must be inspected in HEAT Enterprise to be eligible for invoicing.

- d. Select the **Measures** tab
  - i. “Pass/fail” the measure and click the **Set** button.
  - ii. Click **Save and Close**. *Job Status* changes to “Inspect”

## 7. Upload WAP Documents

- a. Select **WAP>Wap Documents** menu option to access the **WAP DOCUMENT** screen
- b. Upload the required documents as a bundle in the *BUNDLE – MHPP Documents* slot

**NOTE:** The other MHPP specific slots are reserved to address missing documents post invoice/review.

## 8. Add Job to Invoice

- a. Go to **HOME > INVOICING>Invoice List** to access the **INVOICE LIST** screen
- b. Create and add job to an invoice like any other job.
  - i. *Funding Source* = CAA Heat Pumps
  - ii. *Program Year* = 2021