

## eHEAT Training Material August 2005

### 1. Handling Application: Entering Application information

The application entry screens for EAP FFY2006 have been improved. The major change is the number of steps has been reduced from 8 to 4 screens.

#### Enhancement Highlights

- Reduce input screens from 8 to 4
- Added link to HH number display to access Application Summary
- Added Drop-down command box (also called combo box)

---

### 1.1 Basic Process Flow

#### 1.1.1 Start of the Process

This process starts when the User clicks on “Client Services” Menu and “Log application” sub-link

#### 1.1.2 Log Application

1. The system displays the application-logging screen.
2. The user enters Household Number or the user enters Social Security Number (SSN), First Name, and Last Name.
3. The user clicks the “Search” button and the system displays search results list from previous years application if there are matches.
4. If there are matches the user can log the application by clicking the “Submit” button.
5. If there are no matches, the user can log the application if the SSN, First Name and Last Name are entered by clicking on the “Submit” button.
6. The system displays a success message or an appropriate error message.

#### 1.1.3 End Logging Application Flow

The Process ends on display of the message

---

### 2.1 Alternate Process Flow

#### 2.2.1 Search Application

1. This process starts when the user clicks on “Client Services” Menu
2. System displays “Household Application Search” page and the user enters one or more search criteria and clicks on the “Search” Button to initiate a search.
3. The drop-down for Year will display the current program year and three previous program years
4. The system defaults all searches to the Current Program Year. The user can change to a different year and perform the search.
5. If records are found the system displays the Search results in a list. If no records are found the system displays a message “No results found. Please select a different search criteria.
6. This search process ends here.

#### 2.2.2 View Household Application History

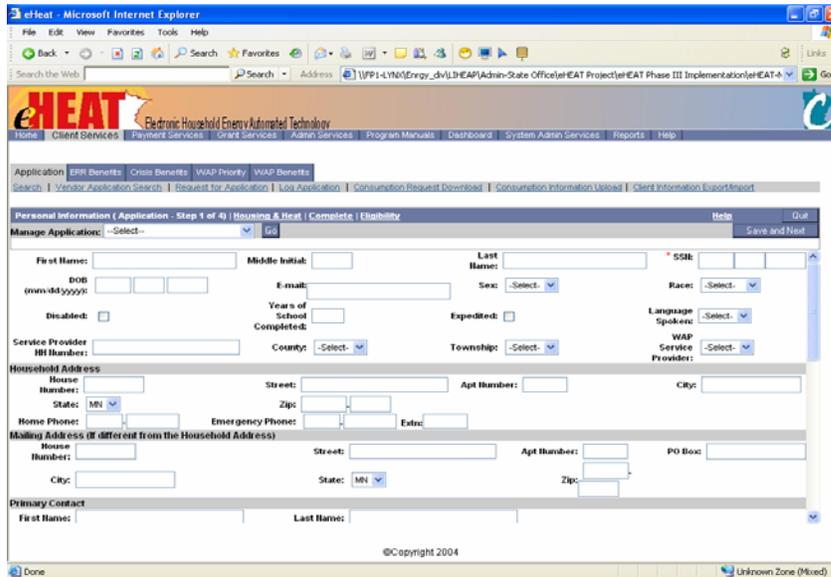
1. This process starts after alternate process 2.2.1
2. The user selects an applicant from the list and clicks on the Status column for the desired record. The word in the Status column is a link to the Application History , which opens in a pop-up window.
3. The system displays the application history for the program year along with the Primary Applicant information.
4. This alternative process ends when the user clicks “Close” on the bottom of the screen and returns to the search results.

### 2.2.3 Edit Application

1. The Application information input process starts after alternate process flow 4.2.1
2. The User selects an application from the list and click on the "Edit" button
3. System displays step one - Personal Information entry screen with the following 3 step-links:
  - **Step One:** Personal Information
  - **Step Two:** Housing & Heat
  - **Step Three:** Complete
  - **Step Four:** Eligibility

### 2.2.3 Step One: Personal Information

1. Primary Applicant Information
2. Household Members
3. Income Information

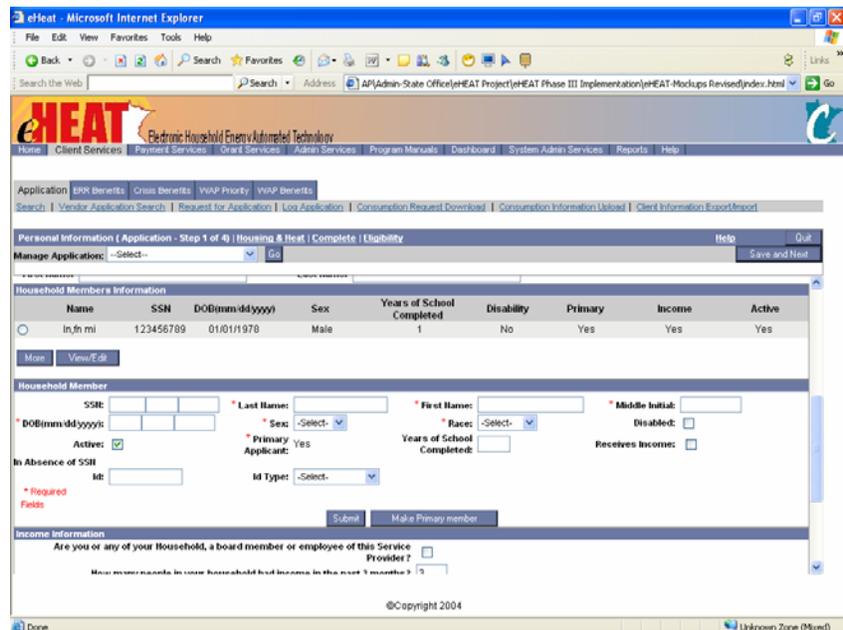


**Screen Shot 1 of 3:** Shows top of Personal Information screen. The next 3 images illustrate Step One of the 4 step application input screens

The application navigation menu is a new feature. The pull down menu, called a combo box, is used to do actions to the application. It also allows access to A16 activities. This feature appears on all pages of the application screens, so these are available through the process.

**Screen Shot 2 of 3:** Shows top of Personal Information screen scrolled to next section.

New feature includes the ability to add Members without drilling down



**Screen Shot 3 of 3:**  
Shows bottom of Personal Information screen scrolled to next section on income.

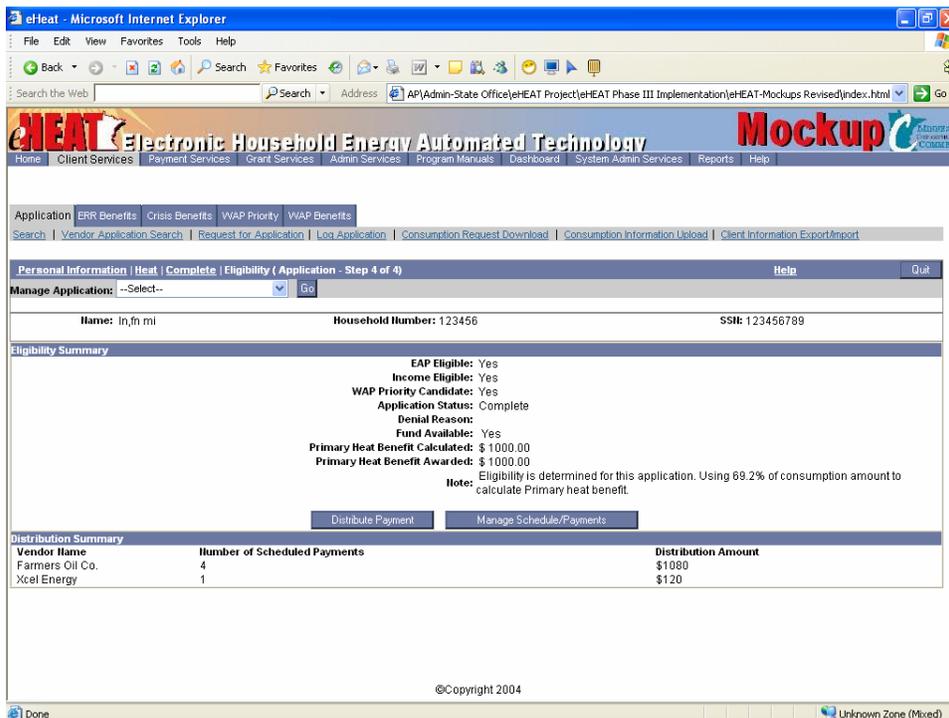
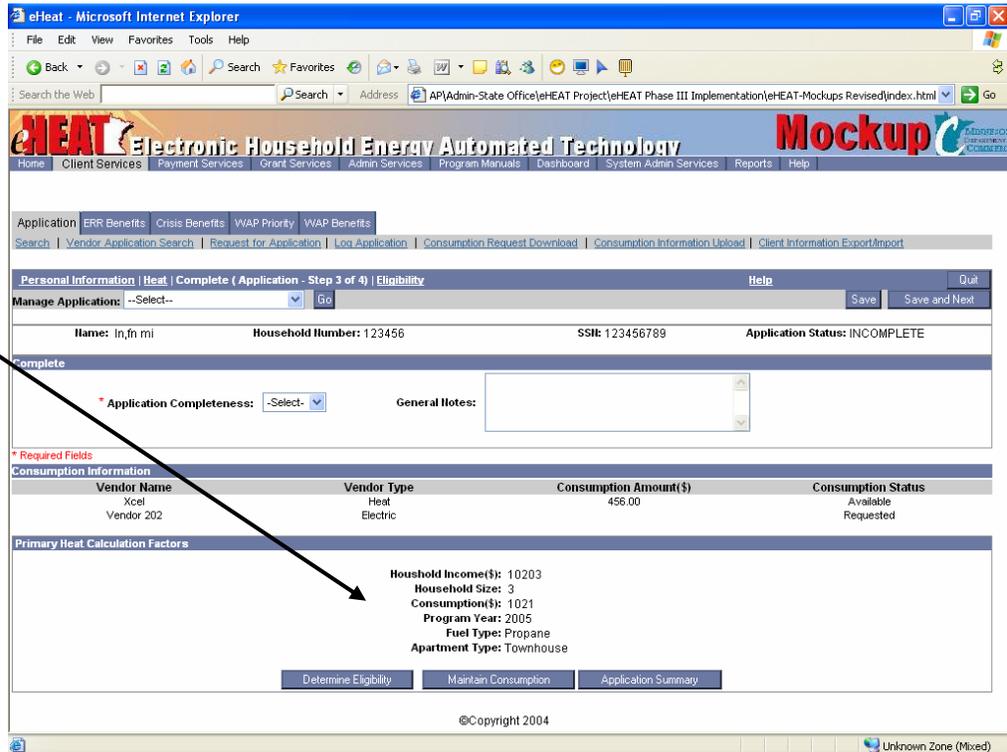
Includes a field for single check entry. If you only have one check or one, entering it here fills in the first check field in the worksheet. The worksheet will be necessary with multiple income entries. (This field will always display the first check in the list, so with multiple checks the total will be different)

**Step Two: Housing & Heat**

1. Housing type etc.
2. Vendor
3. Cold Weather Rule

**Step Three:**  
Complete

1. Added information for user to see what elements of the application are there.



**Step Four:**  
Eligibility

1. Information on elements of eligibility determination
2. Has Distribution Summary at the bottom
3. Manage Payment accessibility buttons

## Rules

1. User enters / modifies all the relevant fields in the Personal information screen and clicks on the “Save and Next” button or clicks on any of the above links and enters the remaining the information.
2. The system validates the information entered for proper data type and displays any error messages before moving on to the Next screen.
3. The user can click on the “Save” at any time during entry to save the information. This will submit the information but not move you to the next page. If you do not save, the information will be lost. (This is recommended for use when you are called away while entering and application)
4. In the Application Complete screen the user reviews the application and selects the application status to be complete or incomplete and clicks on the “Submit” button.
5. On Success the system saves the information and displays the Application Status screen showing the application status and displays the “Determine Eligibility” button. If unsuccessful the system displays appropriate error message.
6. If the application is incomplete the system displays “Hold” button and “Request for Additional Information” button.
7. If the user clicks on the “Hold” button the Application status is set to “Hold” and the user must obtain the information manually from the household/ applicant. The user can enter comments in a text area to input any comments for holding the application.
8. If the user wants to get the additional information through mail, the user enters the additional information needed in a text area and clicks on the “Request for Additional Information” button. On click of this button a request is sent to the “Central Print and Distribution Center” to mail the letter requesting for the additional information.
9. This use case ends after displaying success or error message in this screen.

## 2.2.4 Reactivate

1. This alternate flow starts after alternate flow 2.2.1
2. The User selects an applicant from the list and click on the “Reactivate” from the navigation pull down menu and clicks “Go”.
3. The rest of the process is same as alternative flow 2.2.3

## 2.2.5 Request for Application

1. This flow starts when the user clicks “Client Services” Menu and “Request for Application” sub-link
2. The system displays “Request for Application” screen
3. User enters information and performs any of the following:
  - a. Clicks “Send blank Application” button
  - b. Clicks “Send Rollover / Pre-App application” button
  - c. Clicks “Send Request for SSN” button
4. The system sends a request to Central Print and Distribution to mail the application.
5. The system displays a success message or an error message

### 2.2.6 Void

1. This alternate flow starts after alternate flow 2.2.1
2. The user selects an application and click on “Void” from the navigation pull down menu and clicks “Go”.
3. The system display a success message or an error message
4. This process ends with the message

### 2.2.7 Transfer Agency

1. This alternate flow starts alternate flow 2.2.1
2. The user selects an application from the list and clicks “Transfer Service Provider . . .” from the navigation pull down menu and clicks “Go”.
3. The system displays the Transfer Service Provider screen
4. The user selects an agency from the drop-down and clicks the “Submit” button
5. The system displays a success message or an error message.
5. This process ends with the message

### 2.2.8 Deny and Notify

1. This alternate flow starts after alternate flow 2.2.1
2. The User selects an applicant from the list and click on “Deny and Notify . . .” from the navigation pull down menu and clicks “Go”
3. The system displays the Denial screen with the mailing address pre-filled from application
4. This address can be changed and is used only for mailing purpose, but is not saved into the database.
5. The user selects a denial reason and can enter notes if desired. These notes are for internal use and are not sent with the denial letter.
6. On click of “Send Deny Mail” the system sends a request to Central print and distribution to send a denial letter.
7. The system displays a success message or an error message
8. This process ends with the message

### 2.2.9 Approve for Eligibility

1. This alternate flow starts in two ways as below
  - After alternate flow 2.2.1
  - After step 7 of alternate flow 2.2.3 when the user clicks on “Check Eligibility” button, the system displays the Eligibility Summary Screen.
2. On click of “Approve Eligibility” button the application is approved for Primary Heat Benefit and the system displays a success message or an error message.

### 2.2.10 Additional Information Received

1. This alternate flow starts after alternate flow 2.2.1
2. The User selects an applicant from the list and click on “Received Additional Information” from the navigation pull down menu and clicks “Go”
3. The system saves the additional information received date and time and displays a success or an error message

### 2.2.11 View Application Summary

1. This alternate flow starts after alternate flow 2.2.1
2. The User selects an applicant from the list and click on Household number in the search result list. The Household number is a link.
3. The system displays the Application summary in a pop-up window.
4. This alternate flow ends when the users clicks the “Close Window” button.

### **2.2.12 Close an Application**

1. This alternate flow starts after alternate flow 2.2.1
2. Close application function should only be used if the applicant is deceased. These applications cannot be reactivated.
3. The User selects an applicant from the list and click on “Close . . .” from the navigation pull down menu and clicks “Go”
4. The system displays the Application Close screen
5. The user enters application closure reason and clicks on the “Submit” button
6. The system displays a success message or displays an error message
7. This alternate flow ends here