



ERR eHEAT Screen Instructions

Use of ERR eHEAT screens starts when an EAP eligible homeowner has an emergency due to a non-working or malfunctioning heating system. Use of the screens ends when the problem is resolved, the event is made 'Complete,' the post inspection is completed (if required) and payment has been made. The documentation in the fields on the ERR screens are essential as a detailed record for transactional information, self-monitoring and auditing for integrity.

The screen shots in this document provide examples of adequate documentation in the various fields. An important part of training staff on properly using the eHEAT ERR screens and fields includes training on what is adequate documentation.

Three eHEAT screens relate to ERR events:

- 'ERR Event' screen
- 'ERR Task' screen
- 'ERR Inspection List' / 'Furnace Boiler Information' screen (reached by clicking the 'Maintain Post ERR Inspection' button on the 'ERR Event' screen)

'ERR Event'



The 'ERR Event' screen displays the following fields and values:

- Reason: INADEQUATE HEATING
- Fuel Type: Propane LP
- Reported Date: 2016-12-13
- Response Date: 2016-12-14
- Household report of problem (including temporary heat): Fan doesn't blow so heat doesn't circulate throughout house. Says
- Does the household have temporary heat? Yes
- Ownership Verification: Property statement
- Ownership Verification Notes: 1/12/16 RD doesn't properly tax documents, copy in file. See
- Status: IN PROGRESS
- General Event Notes: (empty)

'ERR Task'



The 'ERR Task' screen displays the following fields and values:

- Task ID: 17501
- Task Name: INADEQUATE HEATING
- Task Description: Fan doesn't blow so heat doesn't circulate throughout house. Says
- Number of tasks completed by contractor: 1
- Number of tasks completed by homeowner: 0
- Task Status: COMPLETE



The 'ERR Task' screen displays the following fields and values:

- Task ID: 17501
- Task Name: INADEQUATE HEATING
- Task Description: Fan doesn't blow so heat doesn't circulate throughout house. Says
- Number of tasks completed by contractor: 1
- Number of tasks completed by homeowner: 0
- Task Status: COMPLETE

'ERR Inspection List'



The 'ERR Inspection List' screen displays the following fields and values:

- Inspection ID: 17501
- Inspection Date: 2016-12-14
- Inspection Status: COMPLETE
- Inspection Notes: (empty)

'Furnace / Boiler Information'



The 'Furnace / Boiler Information' screen displays the following fields and values:

- Furnace/Boiler Model: (empty)
- Year: (empty)
- Efficiency Rating: (empty)
- Inspection Completed By: (empty)

'ERR Event' Screen

The fields on this screen are for documentation of the problem and the rationales related to the event.

'Household report of problem (including temporary heat)' contains notes on the household's report and the temporary heat situation.

'Ownership Verification' pull-down options are:

- Property tax statement
- Mortgage or mortgage payments
- Payment coupons
- County recorder/assessor
- Mobile home title
- Housing authority home ownership
- Signed declaration
- Other (explain)

'Ownership Verification Notes' document who and when documentation was gathered. It also is used to explain the "Other" option if selected from the pull down list for 'Ownership Verification' field.

| Program Application Information | | | | | | |
|---|---|-------------------------|----------------------------|----------------------------|-------------------|-------------------------|
| Household Number: 486399 | Name: DOUGH, JAYNE | | Home Phone: (555) 555-5555 | Emergency Phone: Ext: | | |
| Eligibility Date (mm/dd/yyyy): 05/24/2016 | Program Application Log Date (mm/dd/yyyy): 07/24/2015 | | Own home? Yes | House Type: House | | |
| Address: 1234 WONDERLAND ST., TOWNY MN 55555 | | | | | | |
| ERR Event | | | | | | |
| ERR Event Id: | 17661 | | | | | |
| * Reason: | INADEQUATE HEATING | | | | | |
| * Fuel Type: | Propane / LP | | | | | |
| * Reported Date (mm/dd/yyyy 24h:mi): | 09 | 21 | 2016 | 12 | 13 | |
| Response Date (mm/dd/yyyy 24h:mi): | 09 | 21 | 2016 | 12 | 14 | |
| Household report of problem(including temporary heat): | Fan doesn't blow so heat doesn't circulate throughout house. Have | | | | | |
| Does the household have Temporary Heat? | <input checked="" type="checkbox"/> | | | | | |
| Does the household have secondary heat that heats same area as primary furnace? | <input type="checkbox"/> | | | | | |
| Ownership Verification: | Property tax statement | | | | | |
| Ownership Verification Notes: | 9/21/16 HHD brought in property tax statement. Copy in file. SLS | | | | | |
| Status: | IN PROGRESS | | | | | |
| General Event Notes: | | | | | | |
| * Required Fields | | | | | | |
| <input type="button" value="Submit"/> <input type="button" value="Maintain Post ERR Inspection"/> <input type="button" value="Deny"/> <input type="button" value="View Status History"/> <input type="button" value="Quit"/> | | | | | | |
| Tasks | | | | | | |
| Type | Fund Category | Payment Status | Fund Availability | Contractor | Actual Amount(\$) | Inspected |
| <input type="radio"/> REPAIR | ERR | Obligated | YES | ABC | 189.0 | NO |
| <input type="radio"/> REPAIR | ERR | Obligated | YES | ABC | 420.0 | NO |
| <input type="radio"/> INSPECTION | ERR | N/A | YES | Suburban Htg. & Air | 65.0 | NO |
| <input type="radio"/> INSPECTION | ERR | Obligated | YES | Suburban Htg. & Air | 65.0 | NO |
| <input type="button" value="Create"/> <input type="button" value="View/Edit"/> <input type="button" value="Obligate"/> <input type="button" value="View Payment History"/> <input type="button" value="View Status History"/> | | | | | | |
| Create User ID: TSP15ADMIN | | Create Date: 09/21/2016 | | Update User ID: TSP15ADMIN | | Update Date: 09/21/2016 |

'General Event Notes' field is for the Service Provider to keep case notes or transactional information not related to the specific areas in the above notes fields.

The 'Tasks' section of the screen list the Tasks and information about the Tasks associated with the event. Users can create, view, edit or obligate Tasks. Additionally a user can view payment and status histories

The footer shows *who* and *when* details.

'ERR Task' Screen

| Program Application Information | | |
|--|---|--------------------------------|
| HouseHold Number: 488399 | Home Phone: (555) 555-5555 | Emergency Phone: Ext: |
| Name: DOUGH, JAYNE | Own home?: Yes | House Type: House |
| Eligibility Date (mm/dd/yyyy): 05/24/2016 | Program Application Log Date (mm/dd/yyyy): 07/24/2015 | |
| Address: 1234 WONDERLAND ST., TOWNY MN 55555 | | |
| ERR Event Information | | |
| ERR Event Id: 17861 | Reason: INADEQUATE HEATING | Status: IN PROGRESS |
| Reported Date (mm/dd/yyyy 24h.mi): 09/21/2016 12:13 | Response Date (mm/dd/yyyy 24h.mi): 09/21/2016 12:14 | |
| Existing Condition Note: | | |
| ERR Task | | |
| Task Id: 22228 | Type: REPAIR | |
| Date Created (mm/dd/yyyy): 09/21/2016 | Contractor/SP assessment of problem: Belt on furnace blower needs to be replaced. | |
| Number of contractors contacted to request bids? 0 | Number of bids received? 0 | |
| Describe work completed by contractor: Belt was replaced, new filter installed | | |
| * Fund Category: ERR | Payment Status: Obligated | Fund Availability: Yes |
| * Contractor: ABC (Andy's Boiler Co) | * Estimate and Bid ERR Amount(\$): 175.00 | Actual ERR Amount(\$): 189.00 |
| Work Order Authorized Date: 09/21/2016 | Authorized By: SLS | Work Complete Date: 09/21/2016 |
| Inspected: <input type="checkbox"/> | Task Status: IN PROGRESS | Notes (including procurement): |
| Non EAP Funds Amount(\$): | | |
| * Required Fields | | |
| Submit Quit | | |

This screen is used to edit or view an ERR task.

'Contractor/SP assessment of problem' field includes the initial speculation about or description of the problem.

'Describe work completed by contractor' specifies the task details.

When the 'Estimate and Bid ERR Amount(s)' is entered the funds are obligated by auto filling the 'Actual ERR Amount(s).'

To complete task, enter the costs in the 'Actual ERR Amount(s)' for the final payment amount.

'Work Order Authorized Date,' 'Authorized By and 'Work Complete Date' make the work authorization verifiable.

'ERR Inspection List' - 'Furnace / Boiler Information' screen

| Program Application Information | | |
|--|--|---|
| HouseHold Number: 488399 | Home Phone: (555) 555-5555 | Emergency Phone: |
| Name: DOUGH, JAYNE | Own home?: Yes | House Type: House |
| Eligibility Date (mm/dd/yyyy): 05/24/2016 | Program Application Log Date (mm/dd/yyyy): 07/24/2015 | |
| Address: 1234 WONDERLAND ST., TOWNY MN 55555 | | |
| ERR Event Information | | |
| ERR Event Id: 17861 | Notes: | Reason: INADEQUATE HEATING |
| Reported Date (mm/dd/yyyy): 09/21/2016 | Response Date (mm/dd/yyyy): 09/21/2016 | Status: IN PROGRESS |
| Furnace / Boiler Information | | |
| * Appliance Type: HEATING | * Date of Installation (mm/dd/yyyy): 09 21 2016 | * Model and Make: Hot Air 2244 |
| * Serial Number: 123456-789 | * Efficiency Rating: 95% | If the furnace is not 92% AFUE or higher, please explain: N/A |
| Inspector Comment: Correctly installed, appropriate Model/Make | Was the client interviewed?: <input checked="" type="checkbox"/> | User Comment: |
| * Warranty information: 3 Year - Parts & Labor | * Inspection Completed by: Marco Polo | * Inspection Completed Date (mm/dd/yyyy): 09 21 2016 |
| * Required Fields | | |
| Submit Quit | | |

Post-ERR inspection information is entered on the 'Furnace / Boiler Information' screen.

This screen is reached by clicking the 'Maintain Post ERR Inspection' button on the bottom of the 'ERR Event' screen. A screen called 'ERR inspection list' appears and allows the user to enter inspection information by clicking 'Add/Edit' on the 'ERR Inspection List' screen or selecting an existing inspection task to edit.