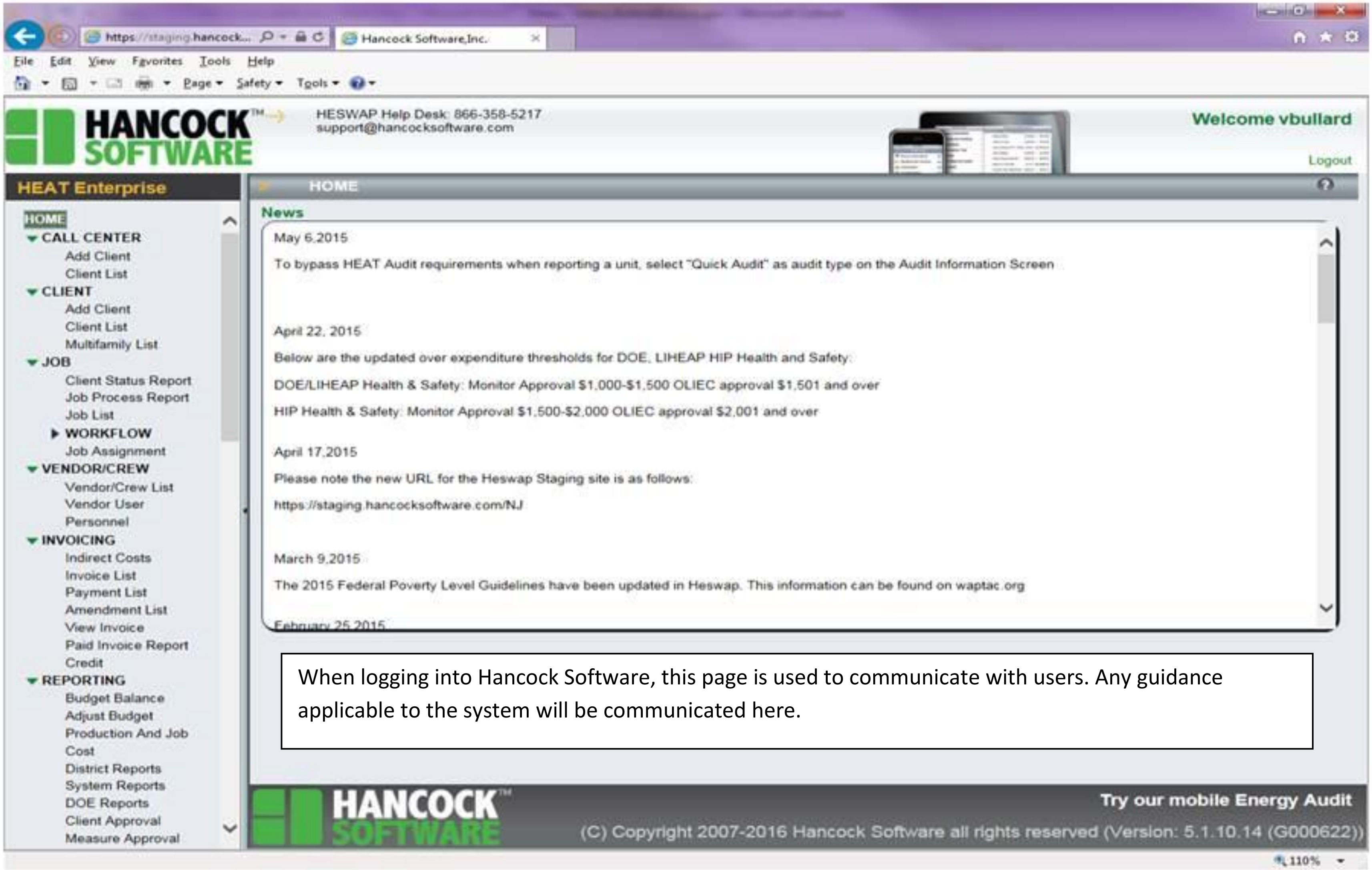
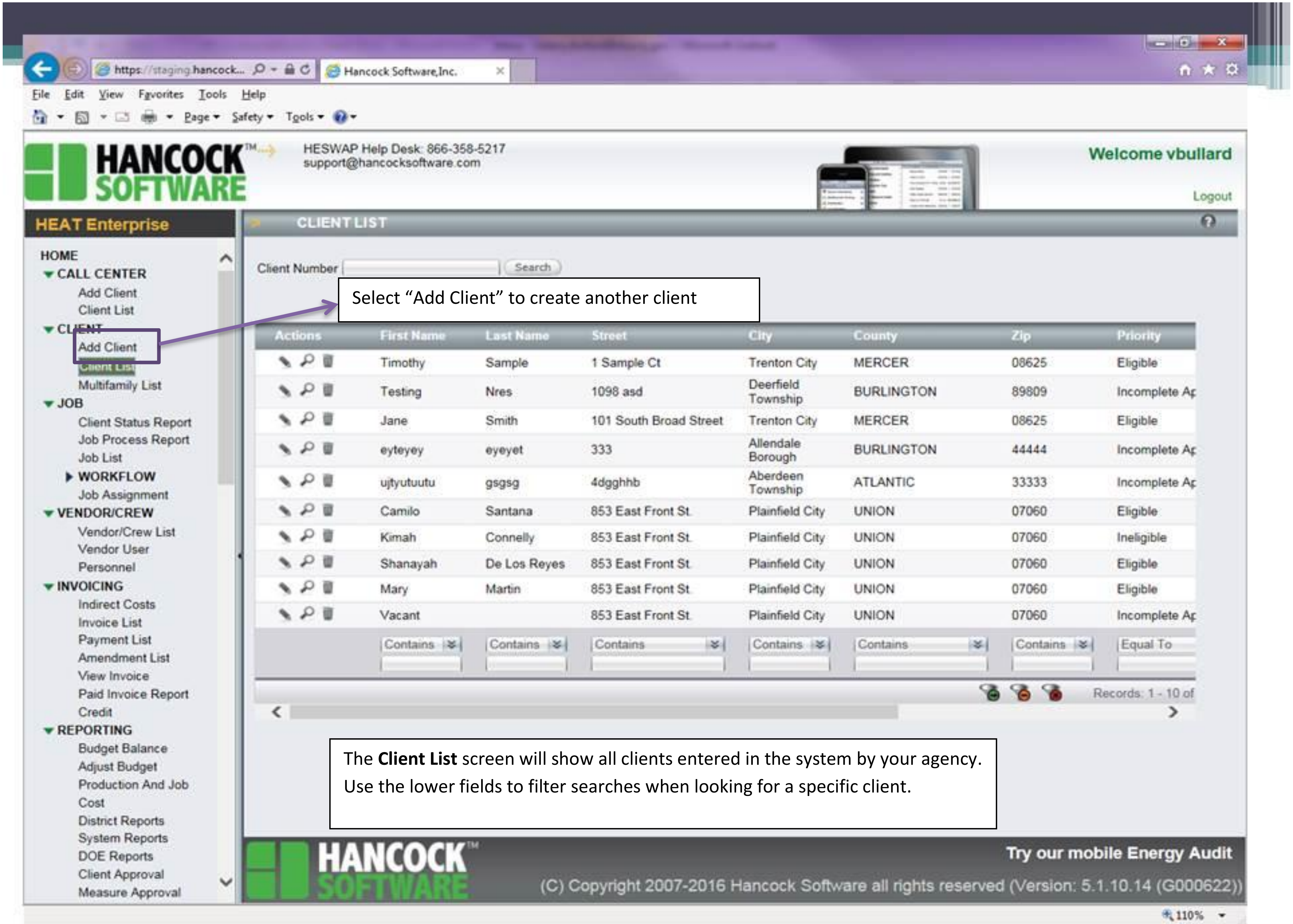
The HESWAP System is used to manage and track production for each Lead Safe Pilot Agency. In this system, client information, the work performed and costs associated with the work are monitored. It is important to keep records as up to date as possible in the system to accurately display the work perfromed by the agency for all actrive grants. As the records are entered, please note that the dates are a key field on every screen to monitor. You want to ensure that the dates reflected for your production are as accurate as possible to ensure proper reporting. Below are outlined key areas of the HESWAP System and their functions. Should you have questions regarding the HESWAP System, please consult with your assigned State monitor and/or contact the Support e-mail address: LeadSafeProgram@dca.nj.gov.

Client Intake



When logging into Hancock Software, this page is used to communicate with users. Any guidance applicable to the system will be communicated here.


HESWAP Help Desk: 866-358-5217
support@hancocksoftware.com
Welcome vbullard
Logout
HEAT Enterprise
CLIENT LIST
HOME
CALL CENTER
Add Client
Client List
CLIENT
Add Client
Client List
Multifamily List
JOB
Client Status Report
Job Process Report
Job List
WORKFLOW
Job Assignment
VENDOR/CREW
Vendor/Crew List
Vendor User
Personnel
INVOICING
Indirect Costs
Invoice List
Payment List
Amendment List
View Invoice
Paid Invoice Report
Credit
REPORTING
Budget Balance
Adjust Budget
Production And Job Cost
District Reports
System Reports
DOE Reports
Client Approval
Measure Approval
Client Number
Search
Select “Add Client” to create another client
Actions
First Name
Last Name
Street
City
County
Zip
Priority
Timothy Sample 1 Sample Ct Trenton City MERCER 08625 Eligible
Testing Nres 1098 asd Deerfield Township BURLINGTON 89809 Incomplete Ap
Jane Smith 101 South Broad Street Trenton City MERCER 08625 Eligible
eyteyey eyeyet 333 Allendale Borough BURLINGTON 44444 Incomplete Ap
ujtyutuutu gsgsg 4dgghhb Aberdeen Township ATLANTIC 33333 Incomplete Ap
Camilo Santana 853 East Front St. Plainfield City UNION 07060 Eligible
Kimah Connelly 853 East Front St. Plainfield City UNION 07060 Ineligible
Shanayah De Los Reyes 853 East Front St. Plainfield City UNION 07060 Eligible
Mary Martin 853 East Front St. Plainfield City UNION 07060 Eligible
Vacant 853 East Front St. Plainfield City UNION 07060 Incomplete Ap
Contains
Equal To
Records: 1 - 10 of
The **Client List** screen will show all clients entered in the system by your agency. Use the lower fields to filter searches when looking for a specific client.
Try our mobile Energy Audit
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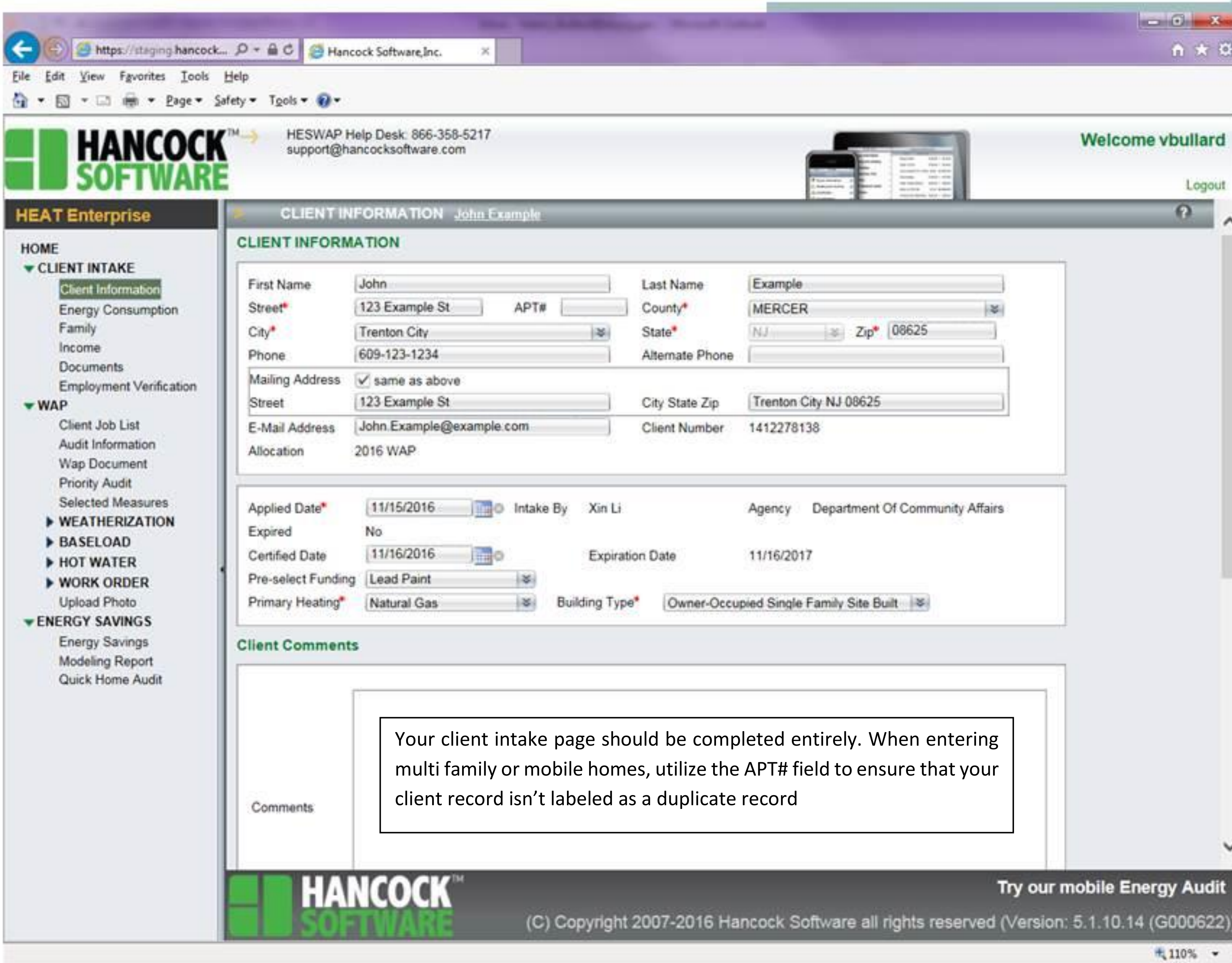
110%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HESWAP Help Desk: 866-358-5217
support@hancocksoftware.com
Welcome vbullard
Logout
HEAT Enterprise
CLIENT INFORMATION John Example
HOME
CLIENT INTAKE
Client Information
Energy Consumption
Family
Income
Documents
Employment Verification
WAP
Client Job List
Audit Information
Wap Document
Priority Audit
Selected Measures
WEATHERIZATION
BASELOAD
HOT WATER
WORK ORDER
Upload Photo
ENERGY SAVINGS
Energy Savings
Modeling Report
Quick Home Audit
CLIENT INFORMATION
First Name John
Last Name Example
Street* 123 Example St
APT#
County* MERCER
City* Trenton City
State* NJ
Zip* 08625
Phone 609-123-1234
Alternate Phone
Mailing Address same as above
Street 123 Example St
City State Zip Trenton City NJ 08625
E-Mail Address John.Example@example.com
Client Number 1412278138
Allocation 2016 WAP
Applied Date* 11/15/2016
Intake By Xin Li
Agency Department Of Community Affairs
Expired No
Certified Date 11/16/2016
Expiration Date 11/16/2017
Pre-select Funding Lead Paint
Primary Heating* Natural Gas
Building Type* Owner-Occupied Single Family Site Built
Client Comments
Comments
Your client intake page should be completed entirely. When entering multi family or mobile homes, utilize the APT# field to ensure that your client record isn't labeled as a duplicate record
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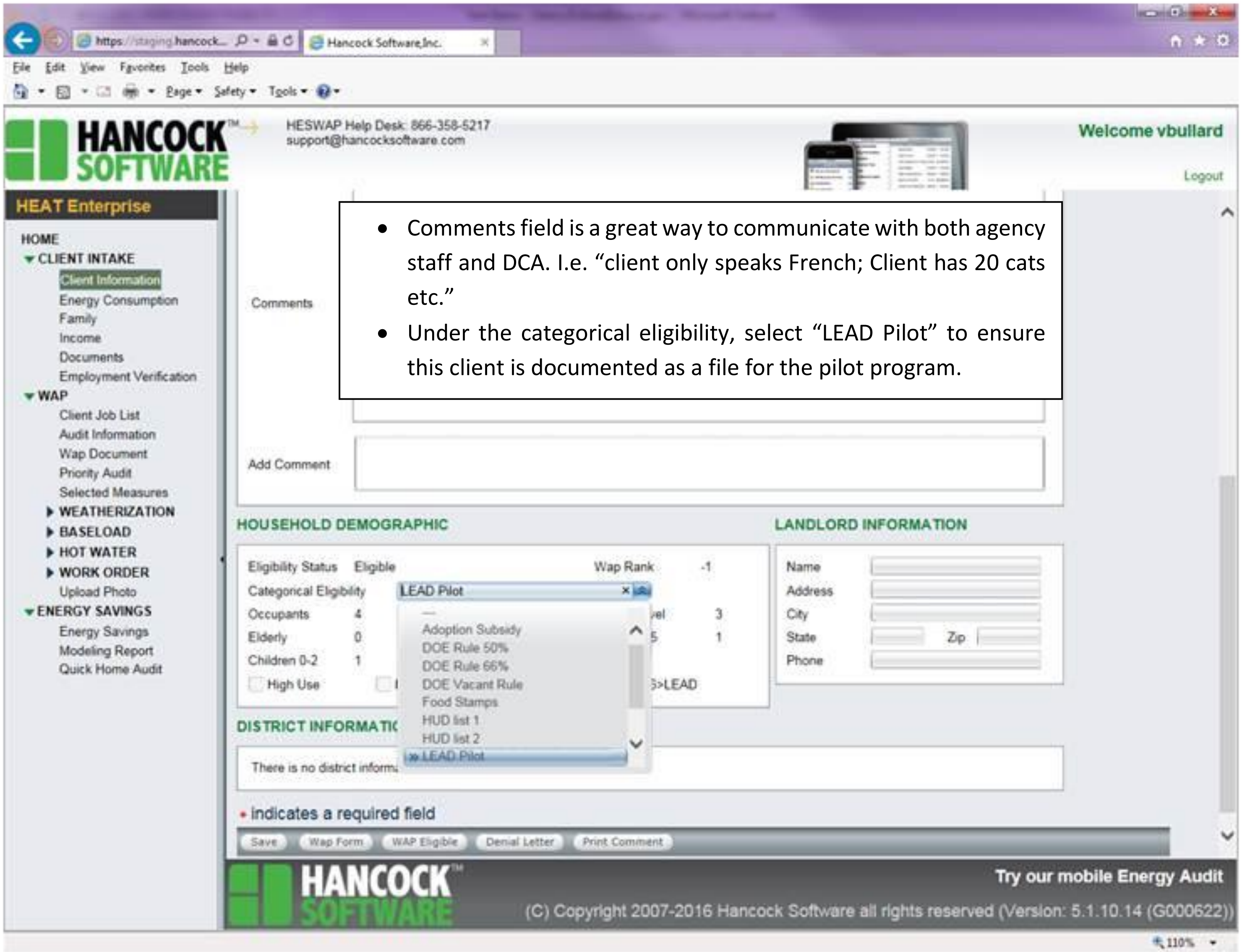
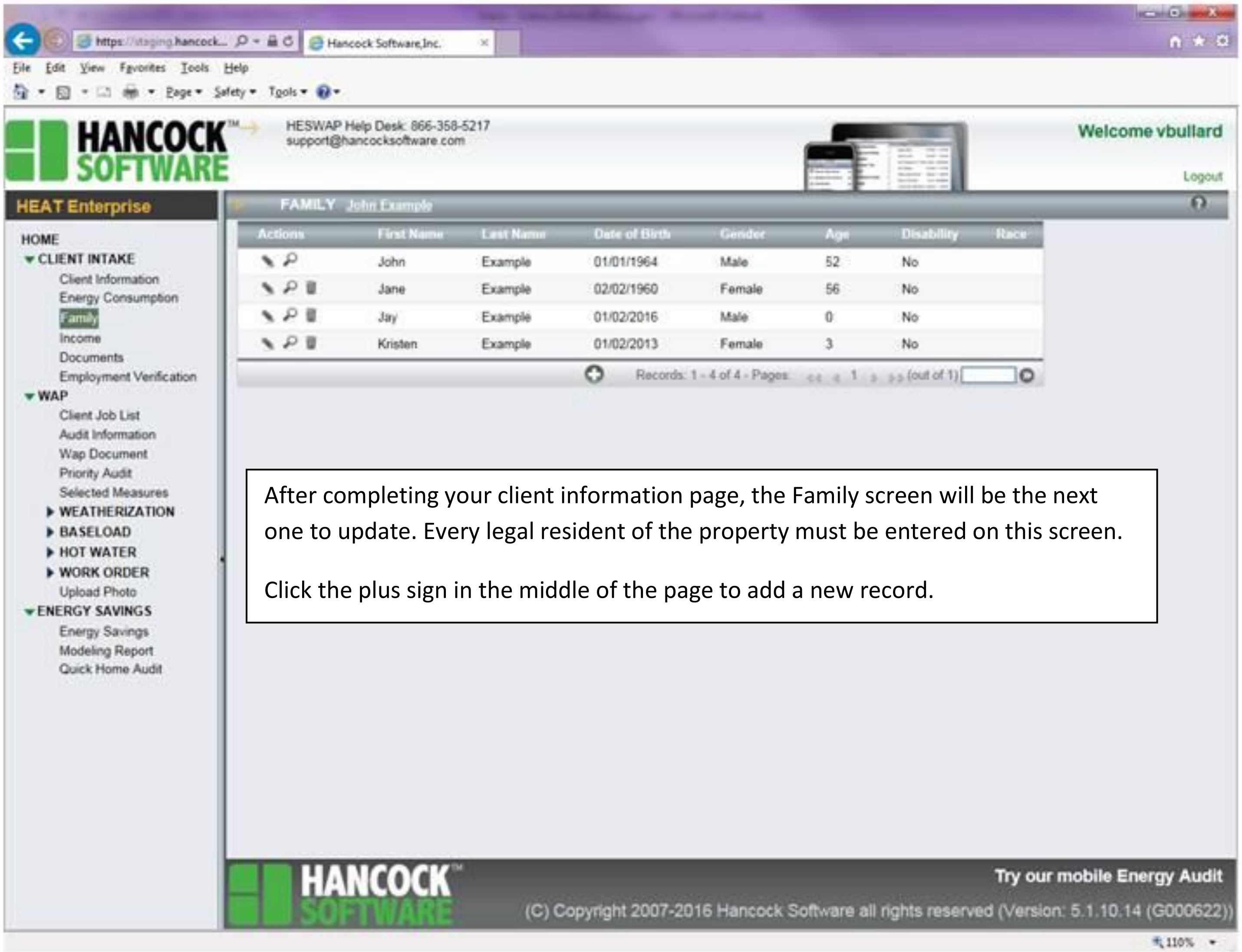
Client Intake



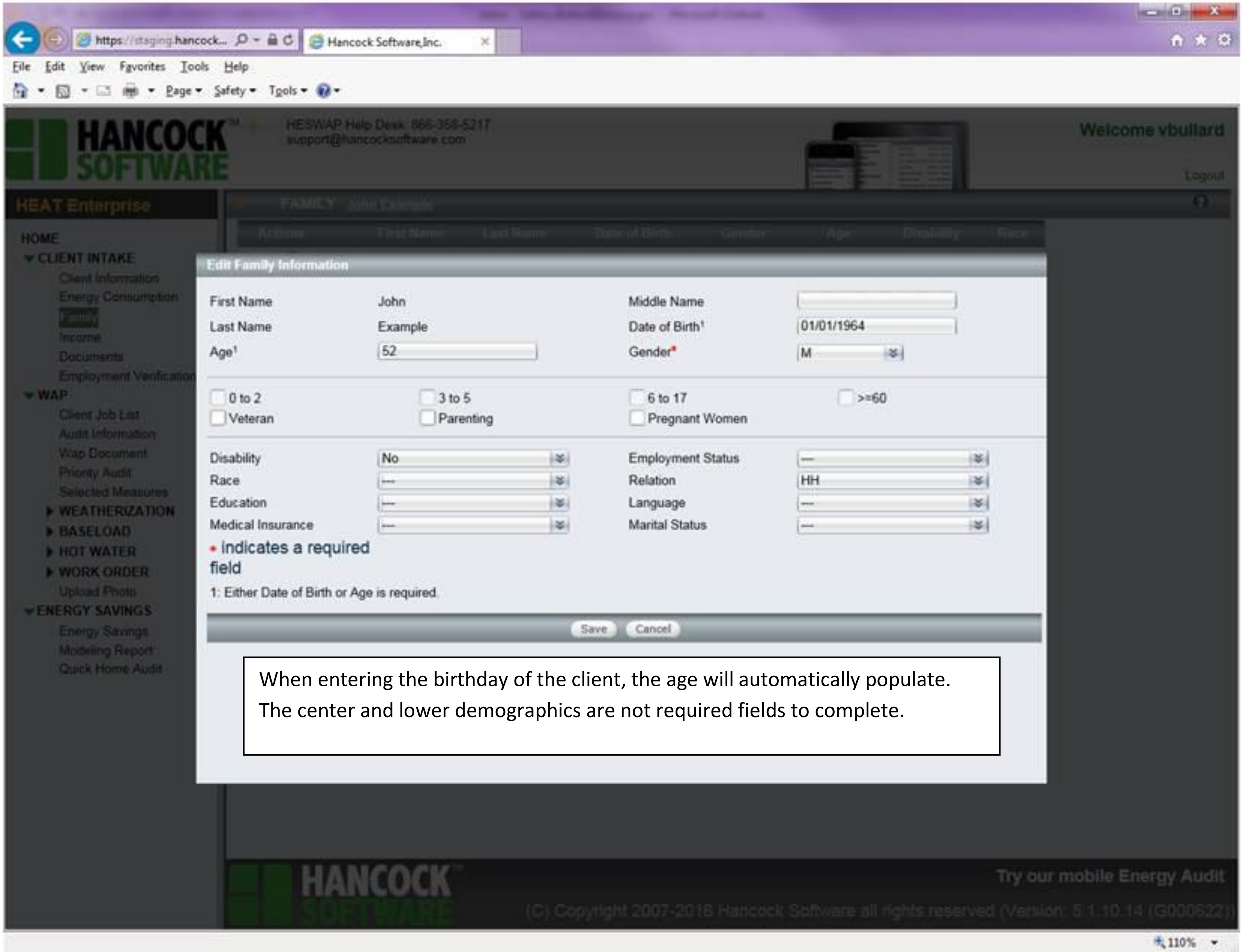
- Comments field is a great way to communicate with both agency staff and DCA. I.e. “client only speaks French; Client has 20 cats etc.”
- Under the categorical eligibility, select “LEAD Pilot” to ensure this client is documented as a file for the pilot program.

Client Intake

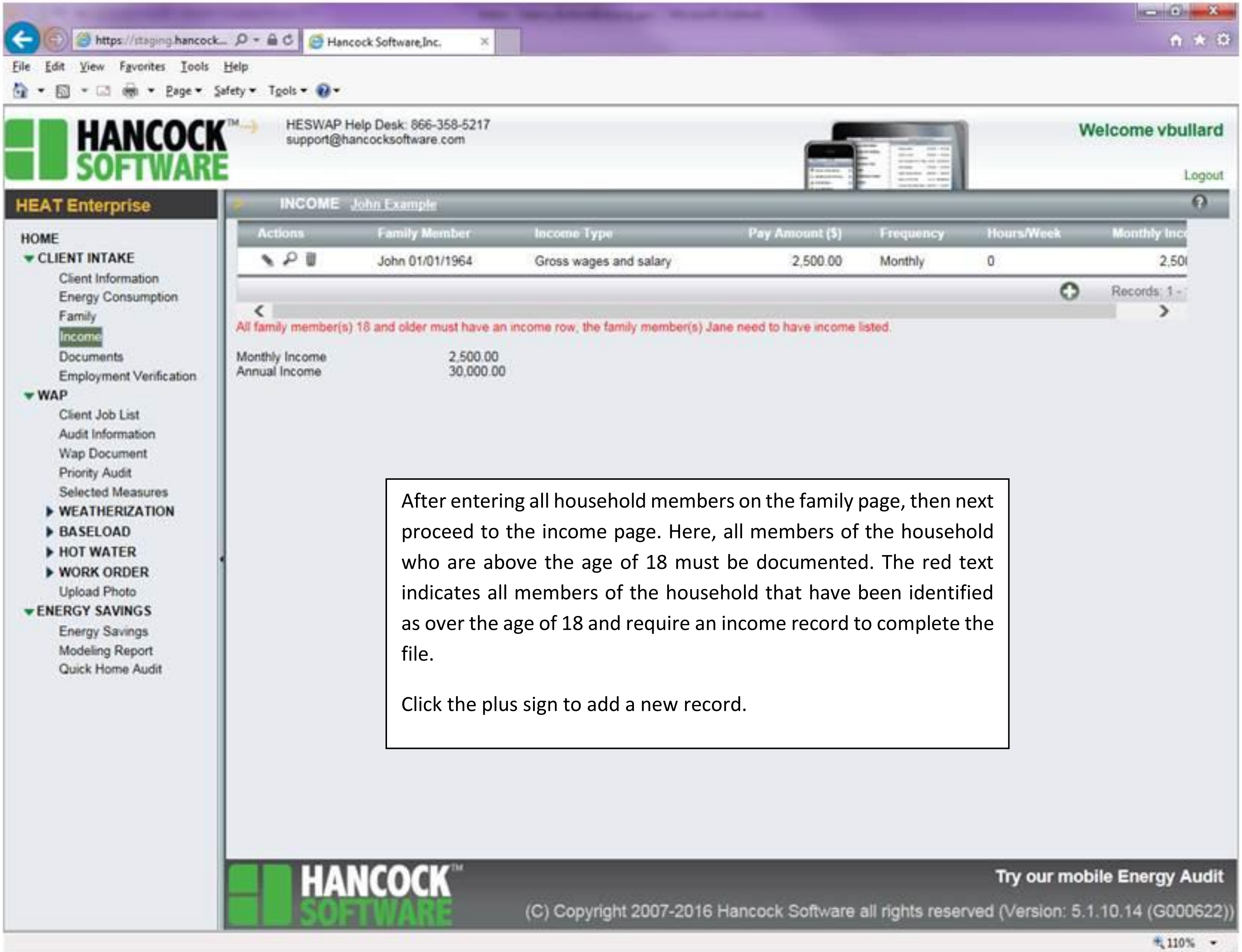


After completing your client information page, the Family screen will be the next one to update. Every legal resident of the property must be entered on this screen.

Click the plus sign in the middle of the page to add a new record.



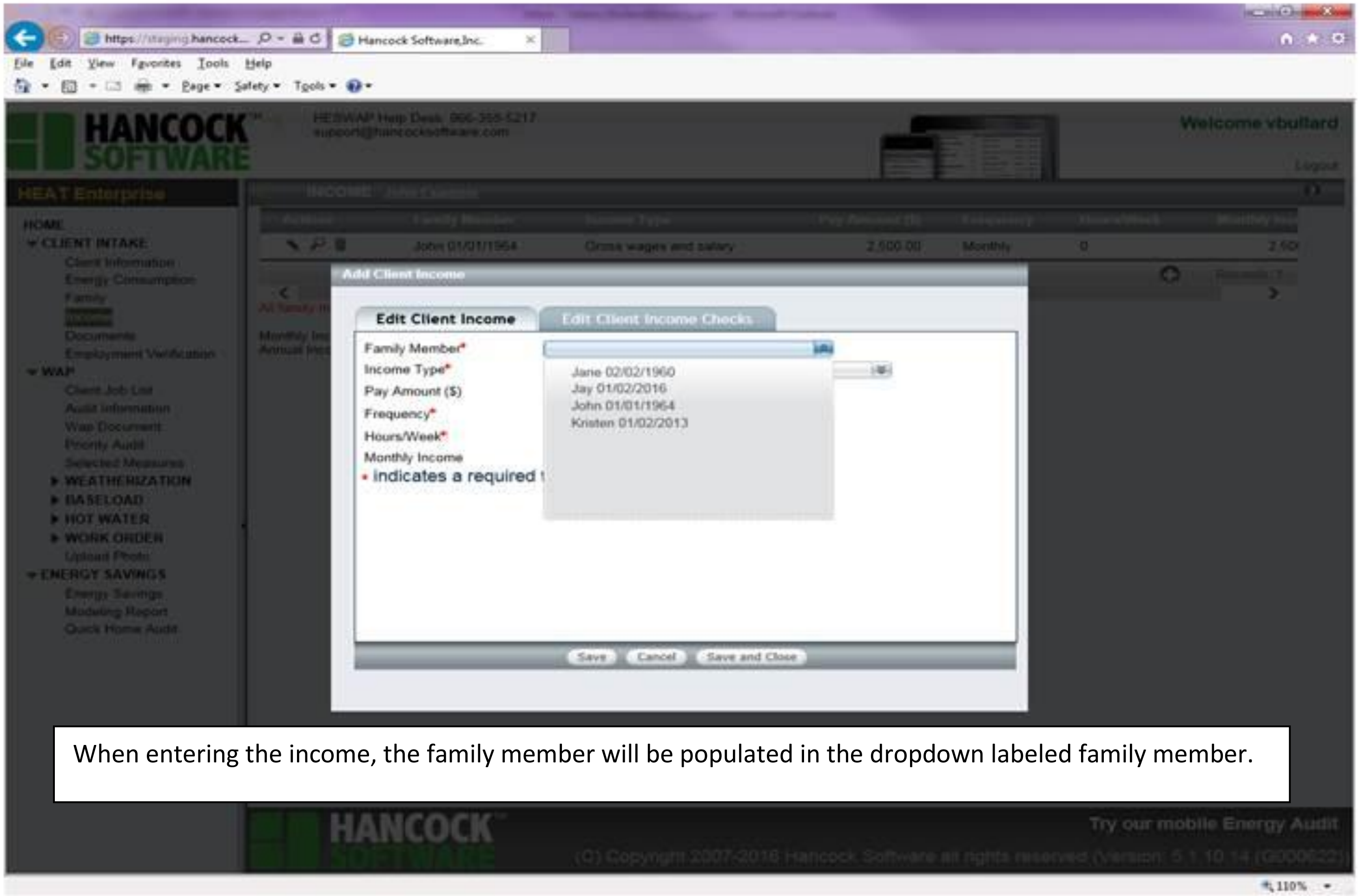
When entering the birthday of the client, the age will automatically populate. The center and lower demographics are not required fields to complete.



After entering all household members on the family page, then next proceed to the income page. Here, all members of the household who are above the age of 18 must be documented. The red text indicates all members of the household that have been identified as over the age of 18 and require an income record to complete the file.

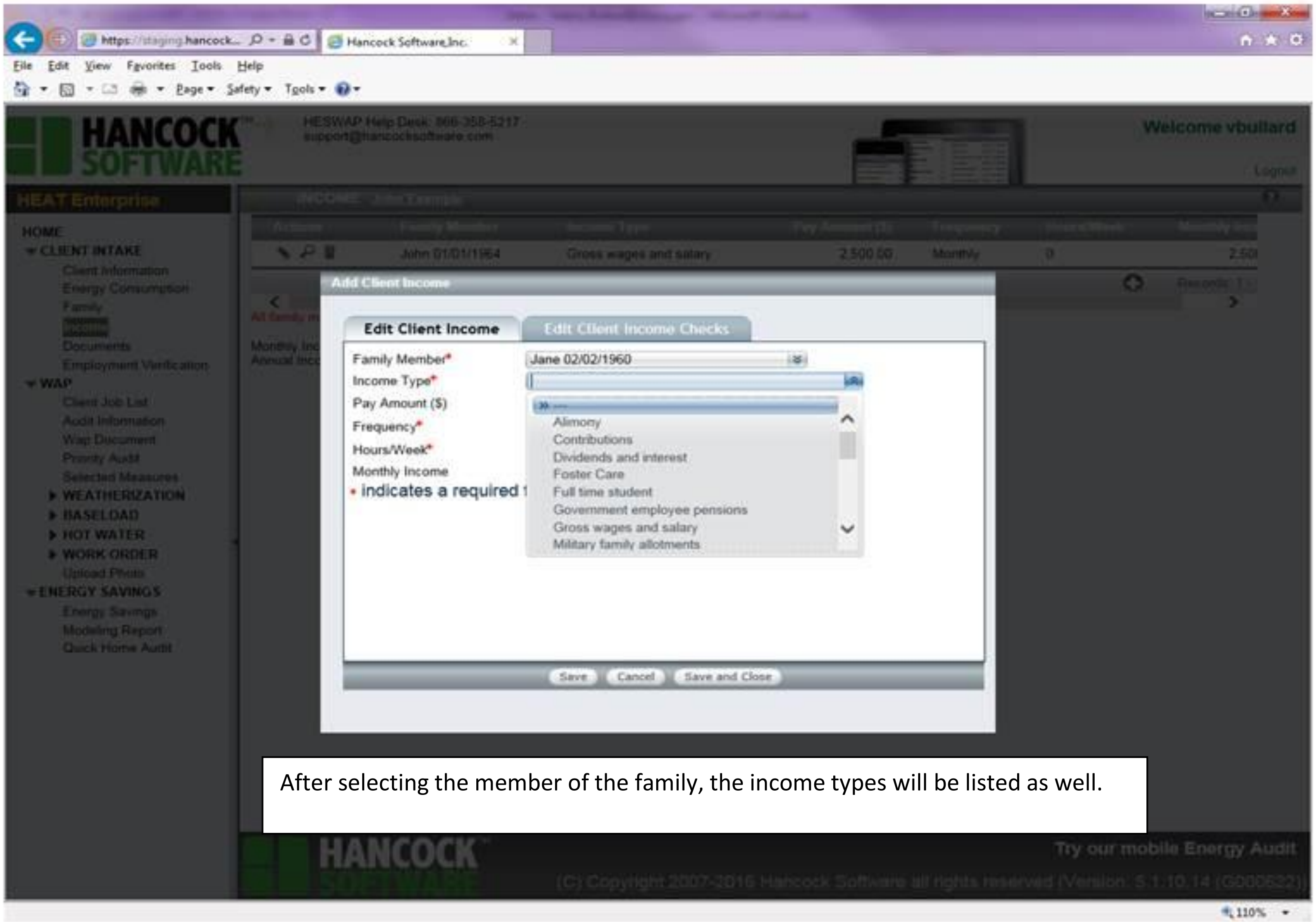
Click the plus sign to add a new record.

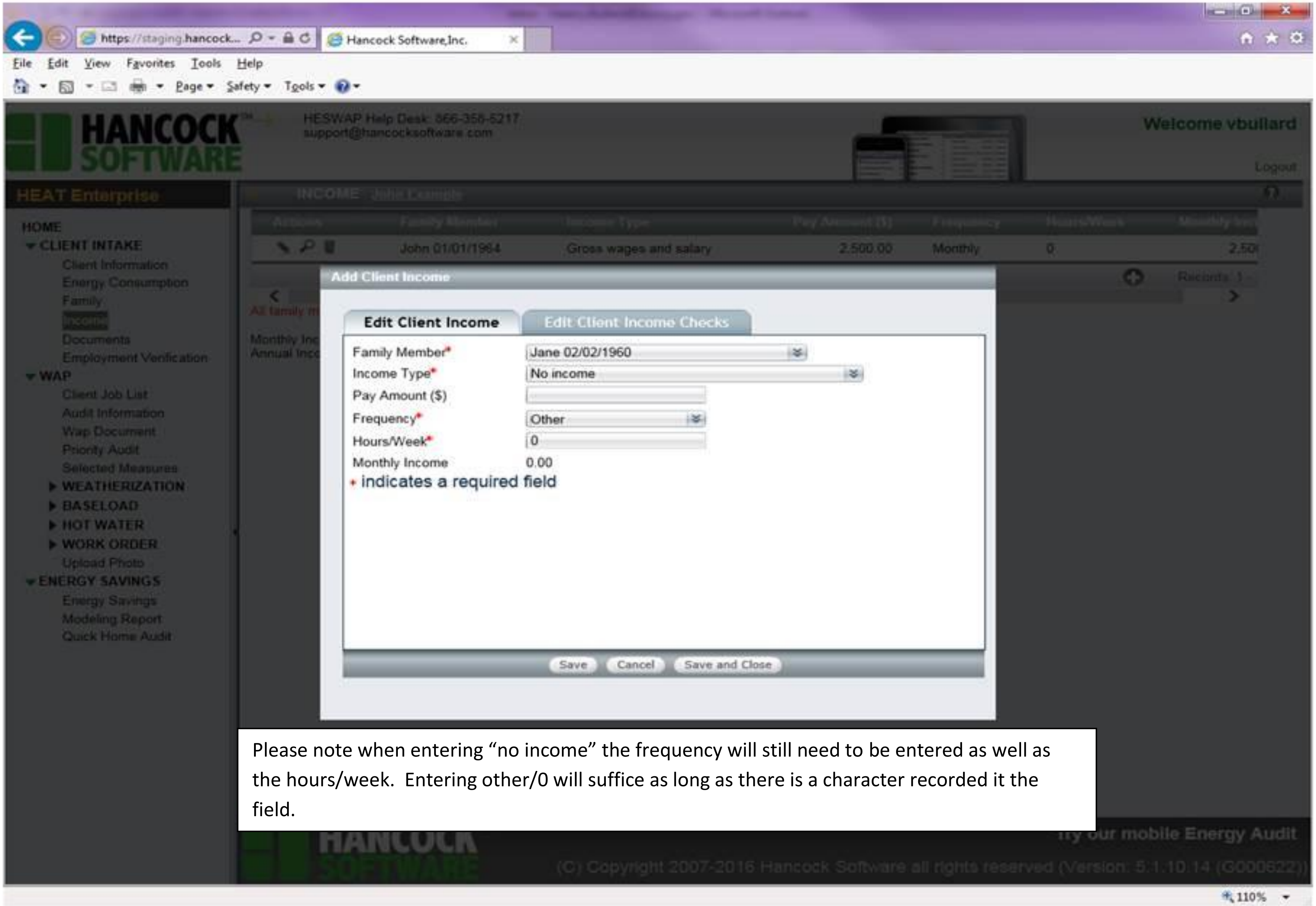
Client Intake



When entering the income, the family member will be populated in the dropdown labeled family member.

Client Intake





Please note when entering "no income" the frequency will still need to be entered as well as the hours/week. Entering other/0 will suffice as long as there is a character recorded it the field.

Client Intake

- 1.1. Required Documentation

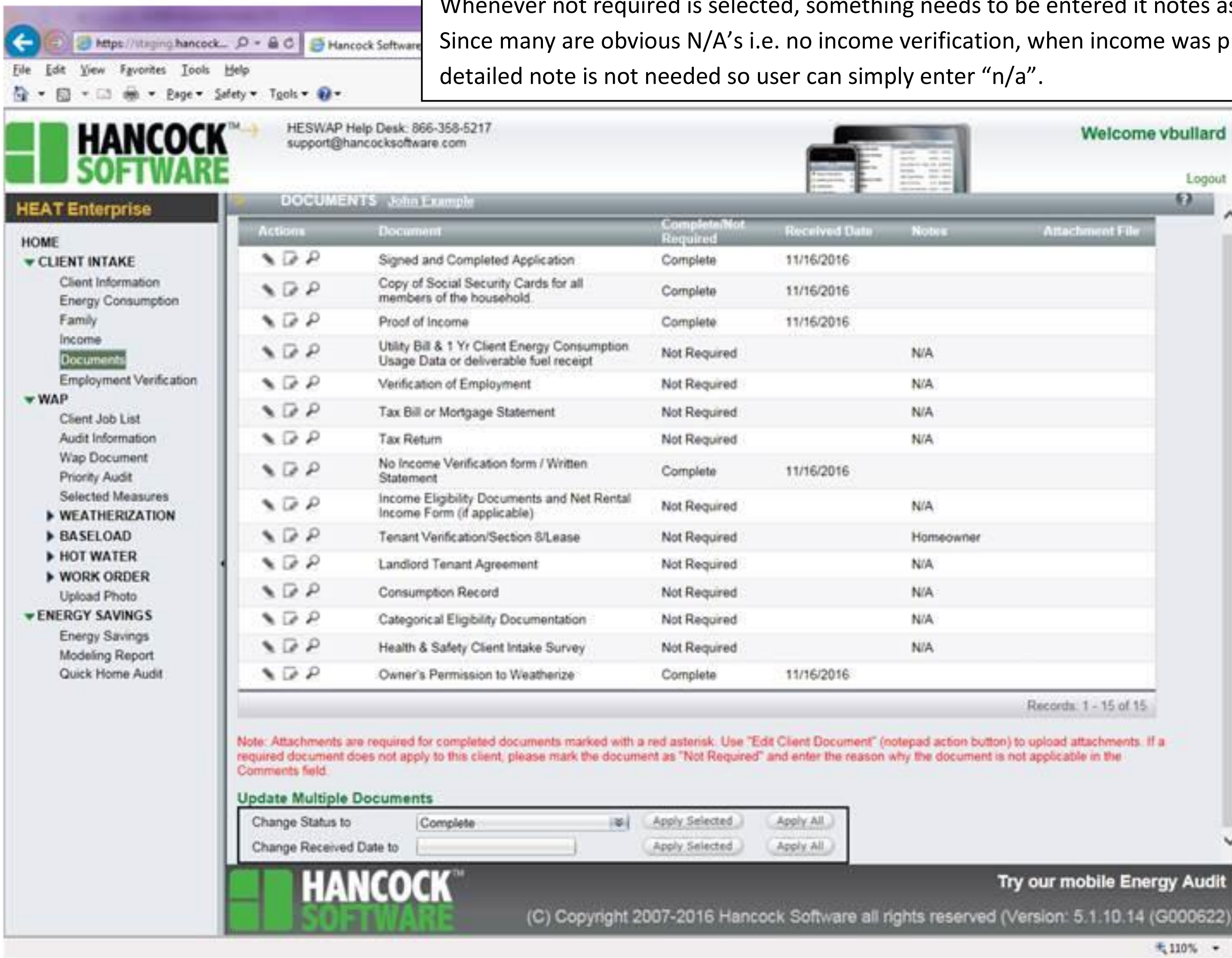
The following are the forms and documents required in an Application Package:

- ***"Lead-Safe Pilot Program Application"***
- ***"Right of Entry Permit and Release of Information Form"***
- ***"Confirmation of Receipt of Lead Pamphlet"***
- Proof of Income
- Copies of Social Security Cards or Equivalent Documentation for all household members
- Proof of Residence at property for occupants
- Proof of Ownership (copy of mortgage deed, or rental agreement, or county tax record)
- Copy of Current Property Tax Bill
- Copy of Current Water and Sewer Bill
- For Lead Abatement Grants, an Order for Abatement from a Health Department if

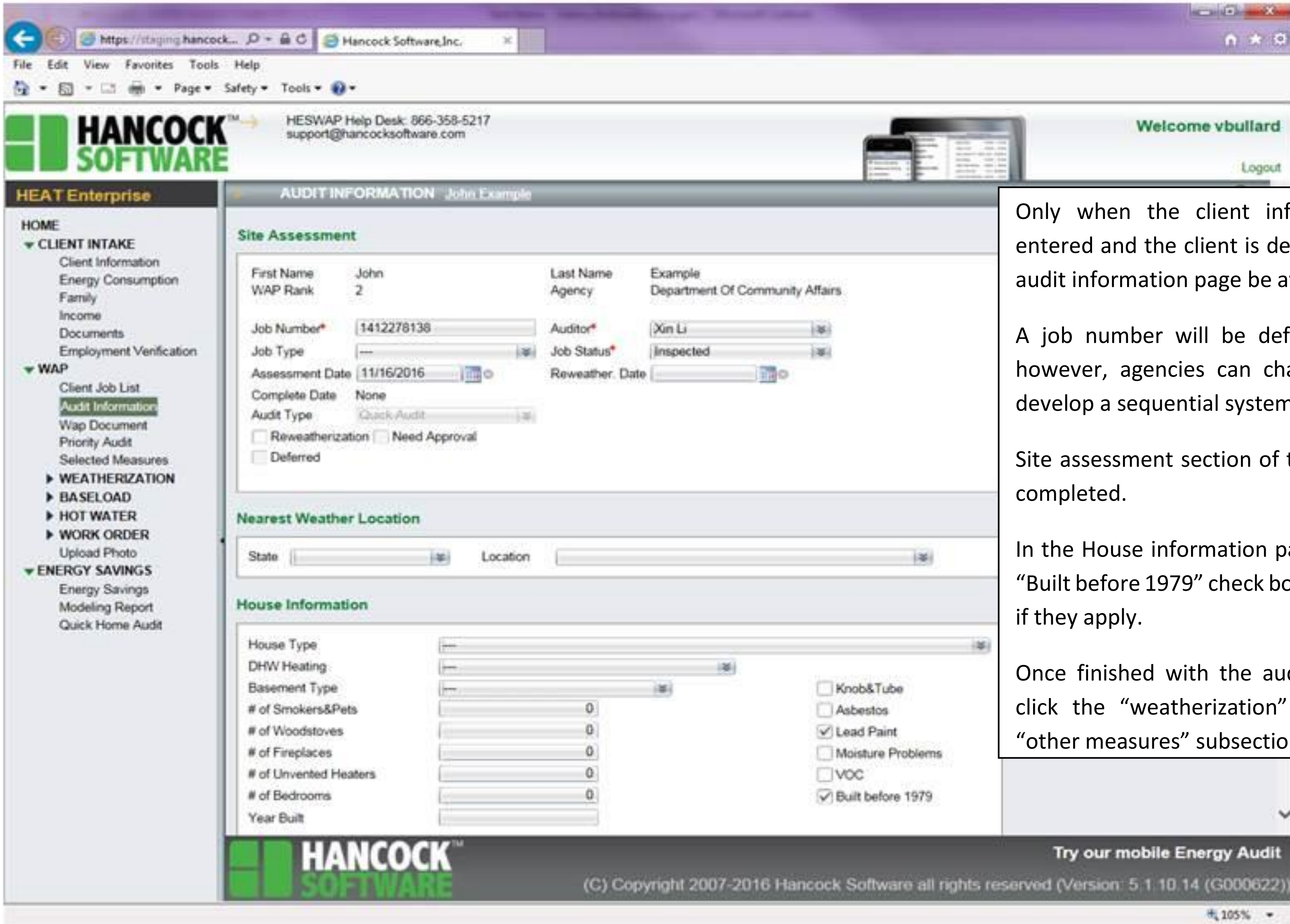
Client Intake

The documents screen serves as a checklist of what is to be expected in the physical client file. As some items listed pertain to programs outside of Lead Pilot, users should enter not required near each item as well as insert a character in the notes field.

Whenever not required is selected, something needs to be entered it notes as justification. Since many are obvious N/A's i.e. no income verification, when income was provided. A detailed note is not needed so user can simply enter "n/a".



Technical



Only when the client information is entirely entered and the client is deemed eligible will the audit information page be available.

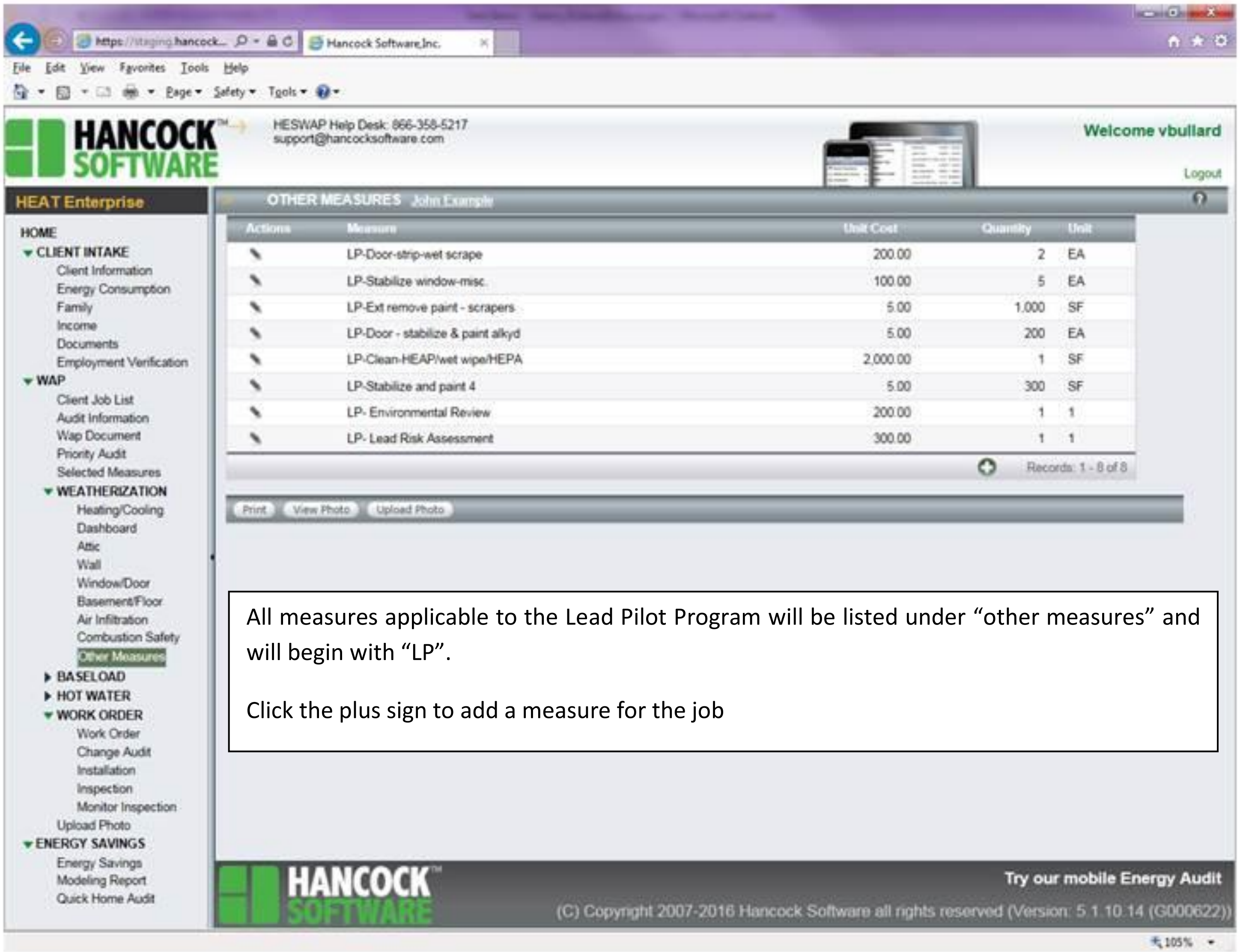
A job number will be defaulted on this page, however, agencies can change this number to develop a sequential system to track records.

Site assessment section of this page needs to be completed.

In the House information page, “Lead Paint” and “Built before 1979” check boxes should be marked if they apply.

Once finished with the audit information page, click the “weatherization” tab and select the “other measures” subsection.

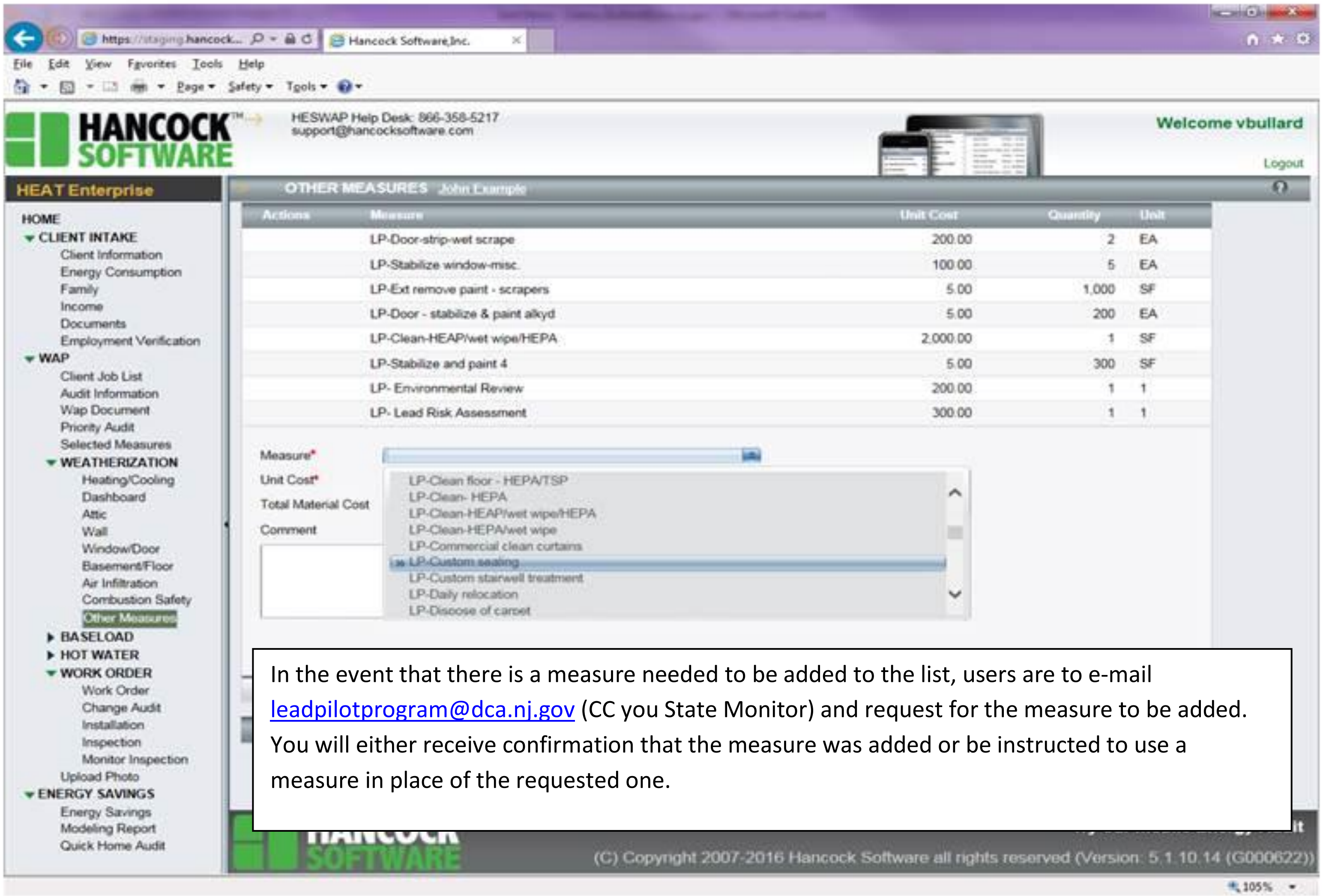
Technical



All measures applicable to the Lead Pilot Program will be listed under "other measures" and will begin with "LP".

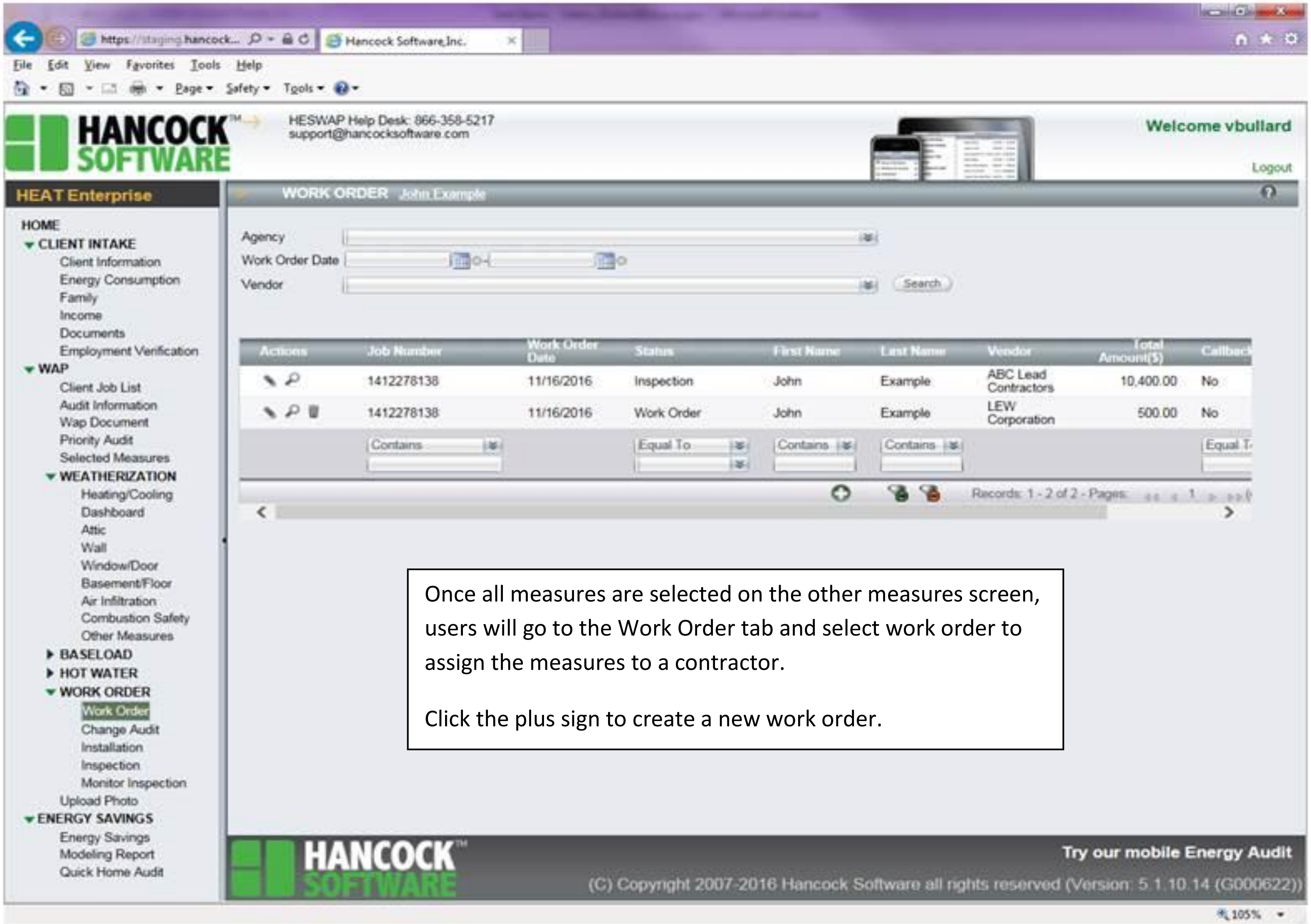
Click the plus sign to add a measure for the job

Technical



In the event that there is a measure needed to be added to the list, users are to e-mail leadpilotprogram@dca.nj.gov (CC you State Monitor) and request for the measure to be added. You will either receive confirmation that the measure was added or be instructed to use a measure in place of the requested one.

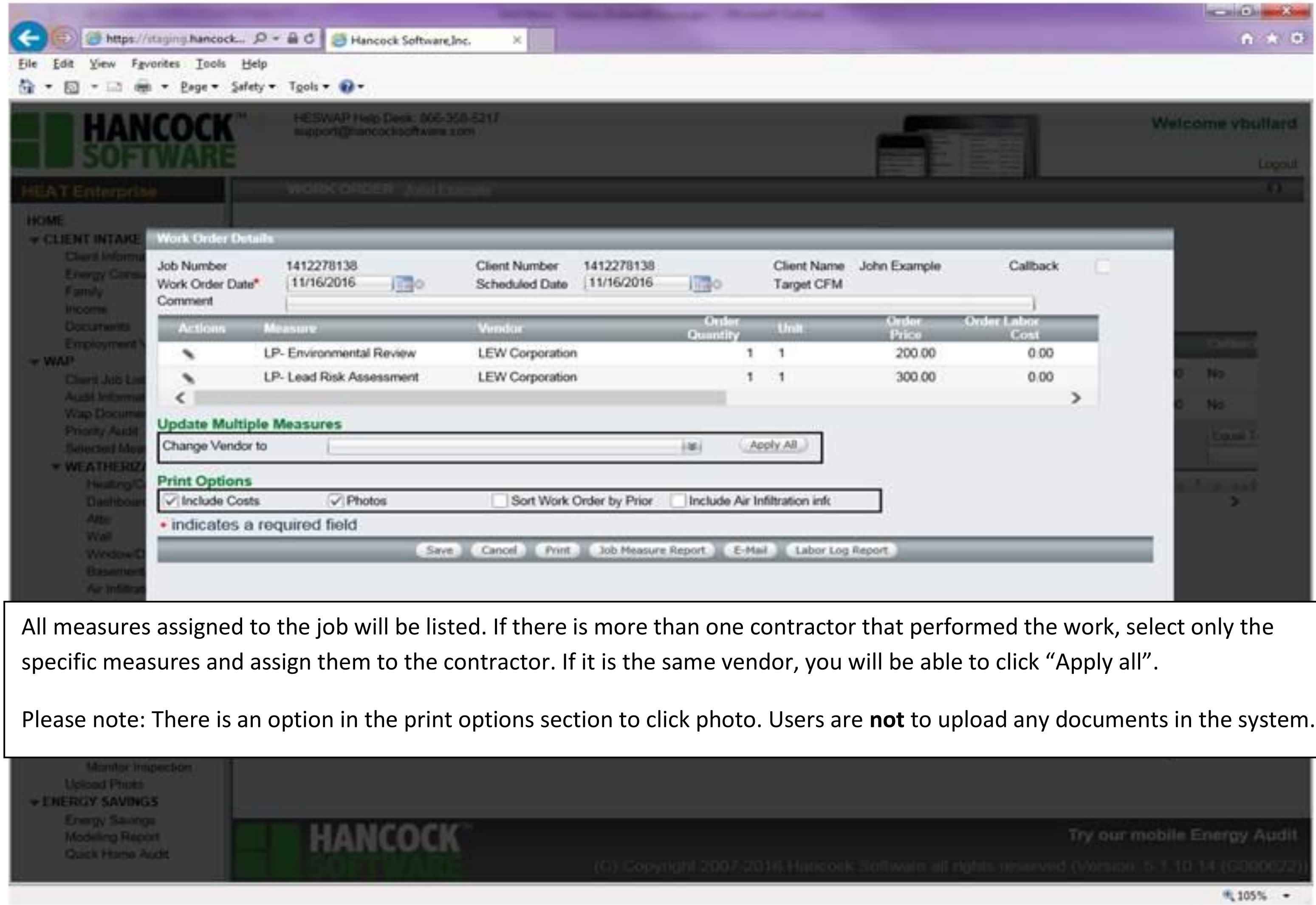
Technical



Once all measures are selected on the other measures screen, users will go to the Work Order tab and select work order to assign the measures to a contractor.

Click the plus sign to create a new work order.

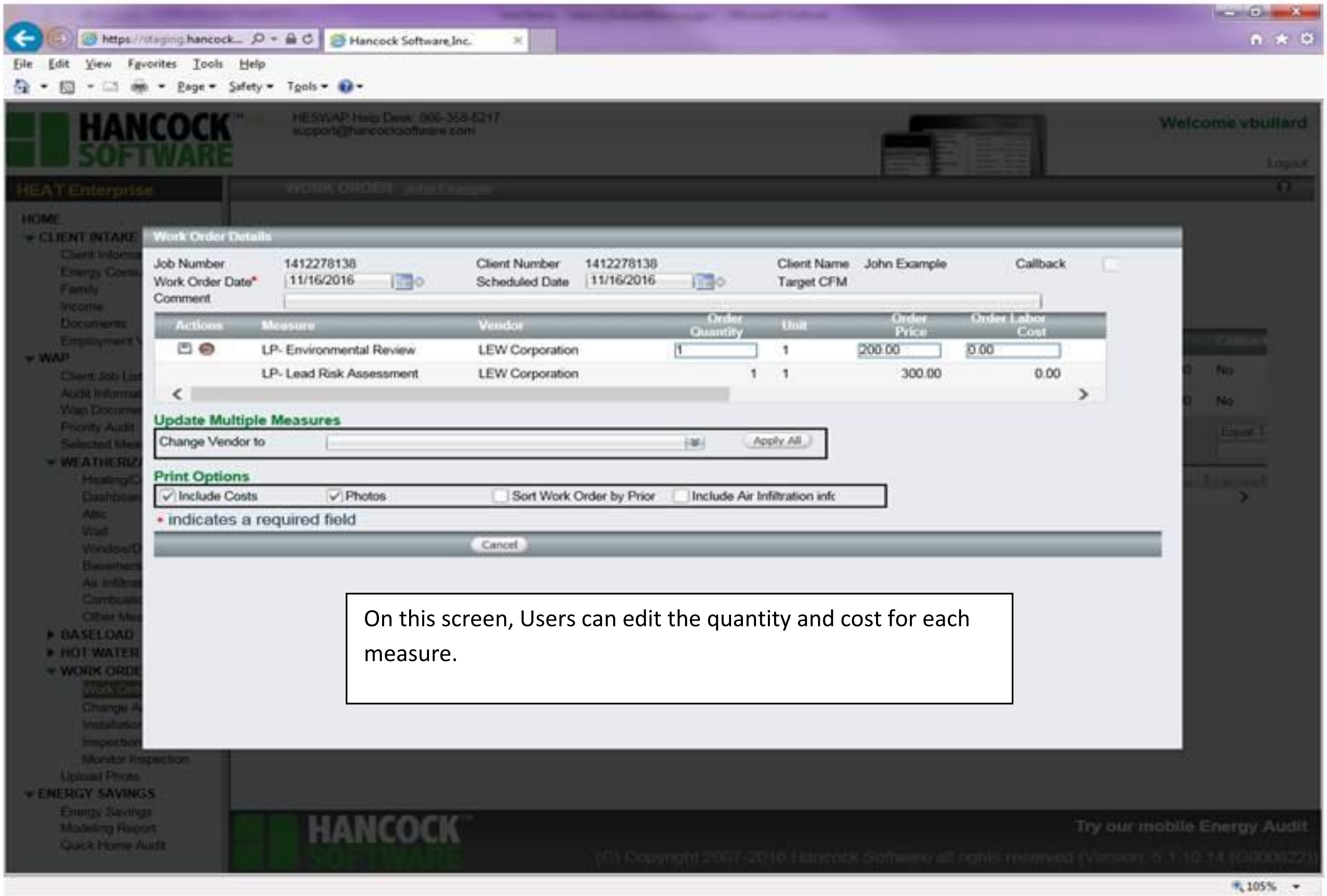
Technical



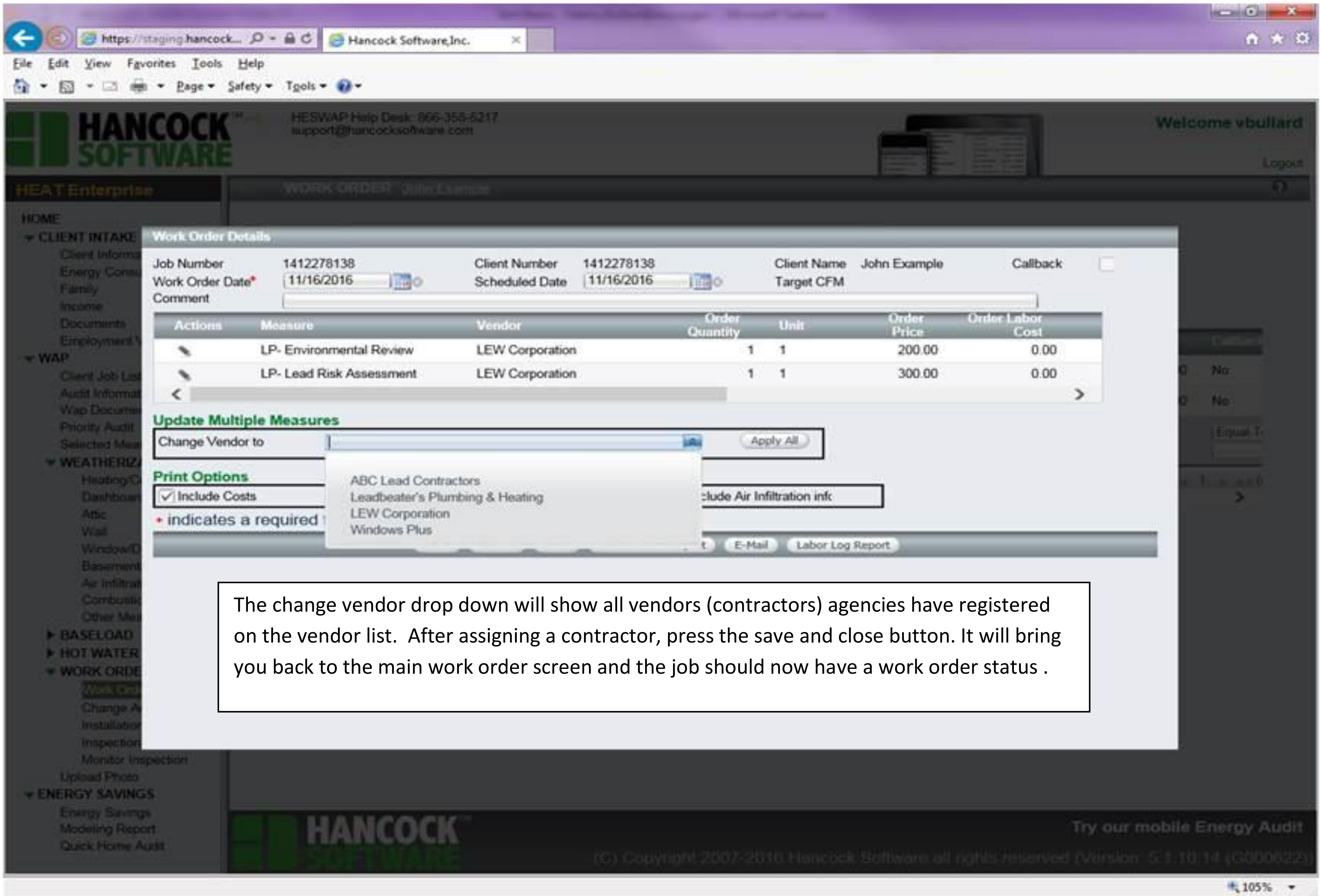
All measures assigned to the job will be listed. If there is more than one contractor that performed the work, select only the specific measures and assign them to the contractor. If it is the same vendor, you will be able to click “Apply all”.

Please note: There is an option in the print options section to click photo. Users are **not** to upload any documents in the system.

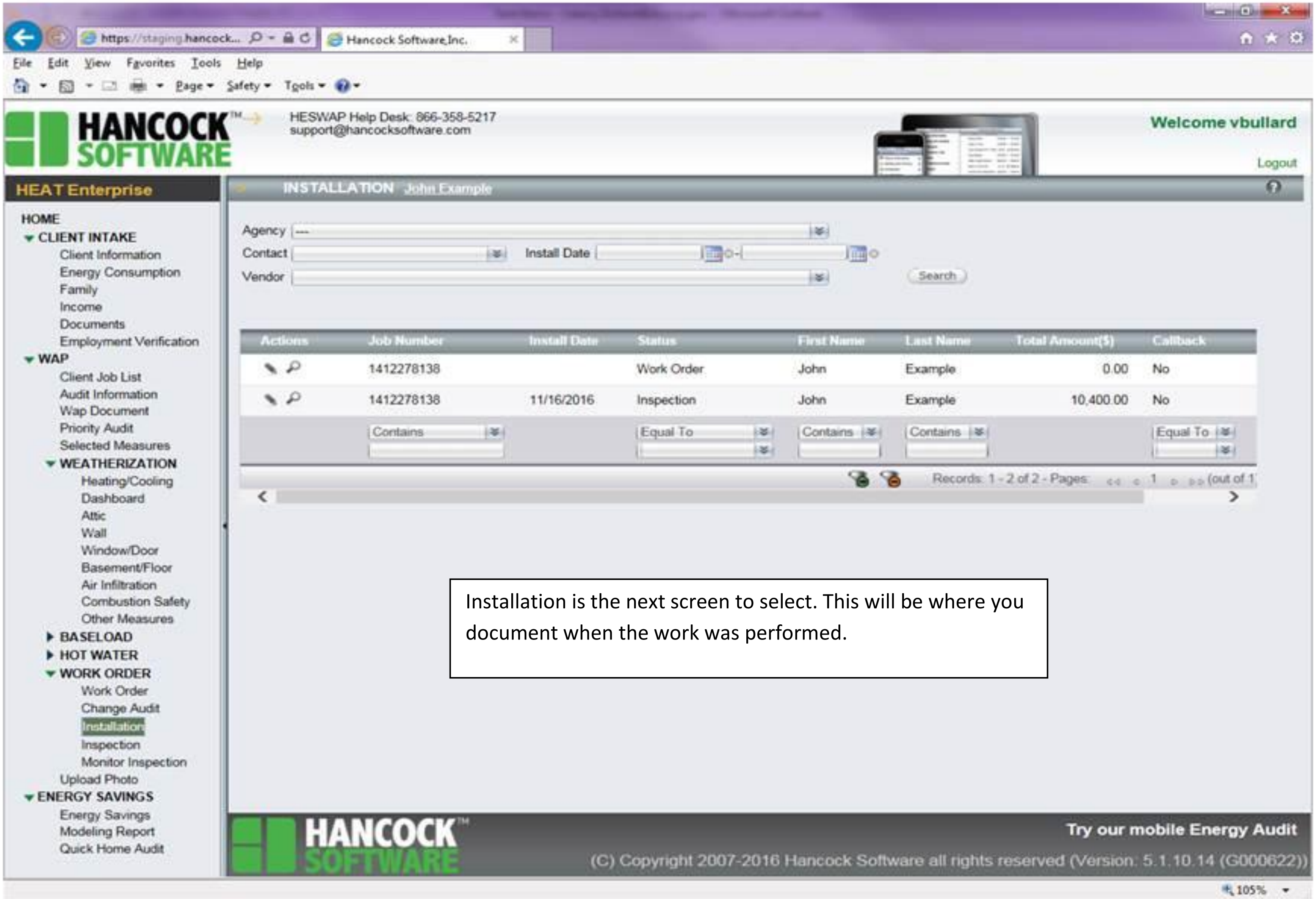
Technical


File Edit View Favorites Tools Help
HANCOCK SOFTWARE
Work Order Details
Job Number 1412278138
Work Order Date* 11/16/2016
Comment
Client Number 1412278138
Scheduled Date 11/16/2016
Client Name John Example
Target CFM
Callback
Actions
Measure
Vendor
Order Quantity
Unit
Order Price
Order Labor Cost
LP- Environmental Review
LEW Corporation
1
1
200.00
0.00
LP- Lead Risk Assessment
LEW Corporation
1
1
300.00
0.00
Update Multiple Measures
Change Vendor to
Apply All
Print Options
Include Costs
Photos
Sort Work Order by Prior
Include Air Infiltration infc
* indicates a required field
Cancel
On this screen, Users can edit the quantity and cost for each measure.

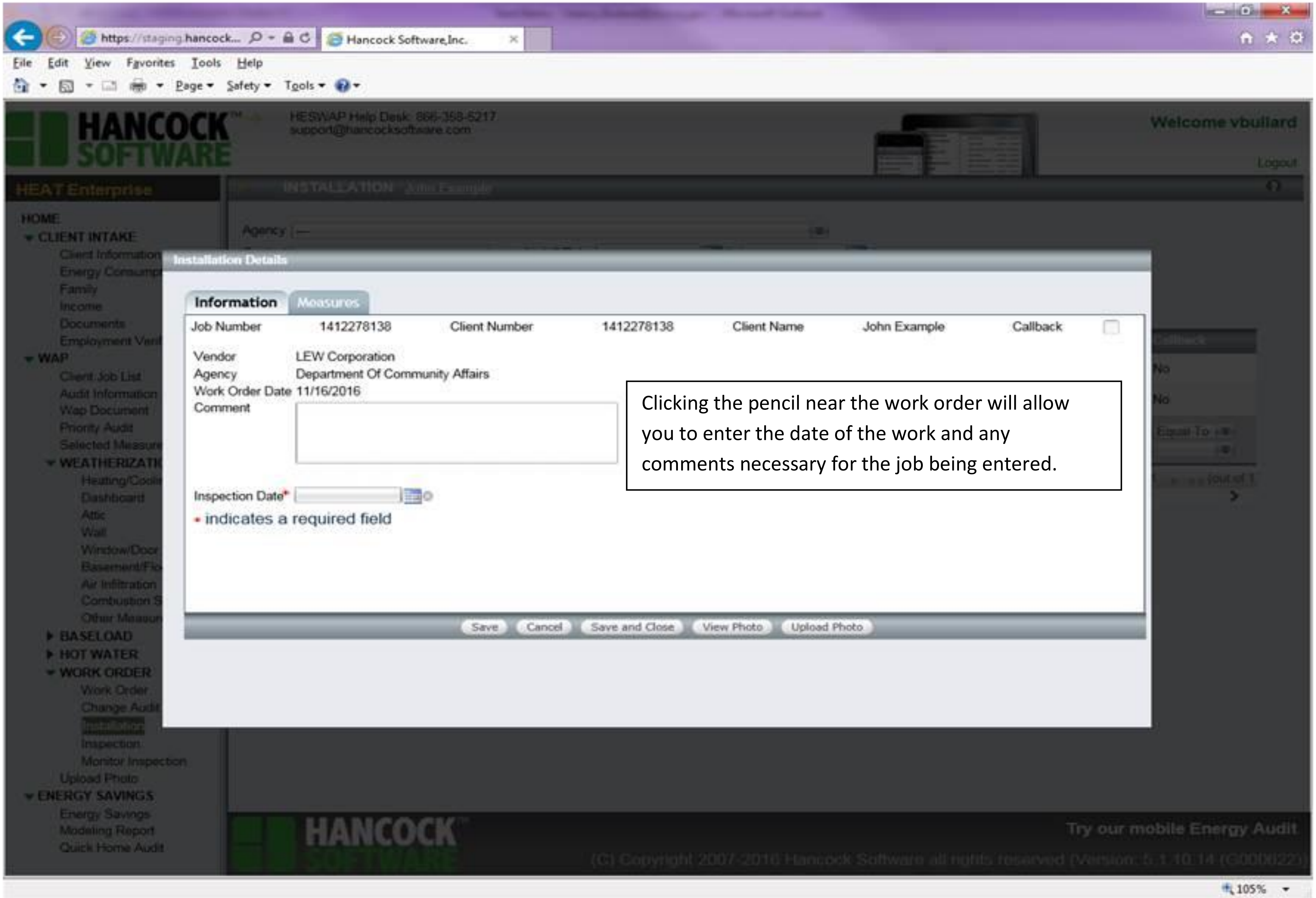
Technical


Work Order Details
Job Number 1412278138
Client Number 1412278138
Client Name John Example
Callback
Work Order Date* 11/16/2016
Scheduled Date 11/16/2016
Target CFM
Comment
Actions
Measure
Vendor
Order Quantity
Unit
Order Price
Order Labor Cost
LP- Environmental Review
LEW Corporation
1
1
200.00
0.00
LP- Lead Risk Assessment
LEW Corporation
1
1
300.00
0.00
Update Multiple Measures
Change Vendor to
Apply All
ABC Lead Contractors
Leadbeater's Plumbing & Heating
LEW Corporation
Windows Plus
Print Options
Include Costs
* indicates a required
E-Mail
Labor Log Report
The change vendor drop down will show all vendors (contractors) agencies have registered on the vendor list. After assigning a contractor, press the save and close button. It will bring you back to the main work order screen and the job should now have a work order status .

Technical



Installation is the next screen to select. This will be where you document when the work was performed.



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File Edit View Favorites Tools Help
Page Safety Tools
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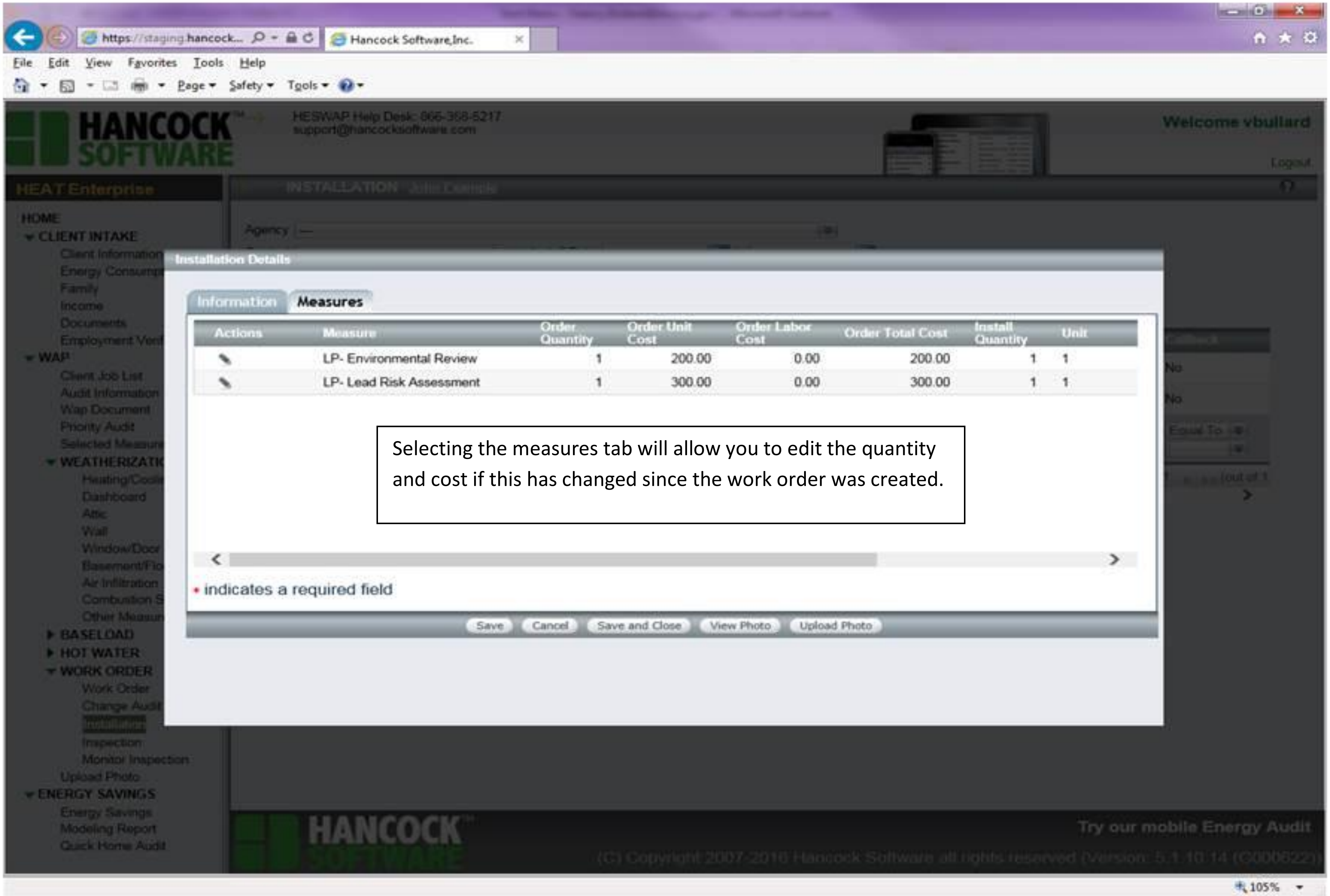
Installation Details
Information
Measures
Job Number 1412278138
Client Number 1412278138
Client Name John Example
Callback
Vendor LEW Corporation
Agency Department Of Community Affairs
Work Order Date 11/16/2016
Comment
Inspection Date*
* indicates a required field
Clicking the pencil near the work order will allow you to enter the date of the work and any comments necessary for the job being entered.
Save
Cancel
Save and Close
View Photo
Upload Photo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BASELOAD
HOT WATER
WORK ORDER
ENERGY SAVINGS
Installation Details
Information
Measures
Actions
Measure
Order Quantity
Order Unit Cost
Order Labor Cost
Order Total Cost
Install Quantity
Unit
LP- Environmental Review 1 200.00 0.00 200.00 1 1
LP- Lead Risk Assessment 1 300.00 0.00 300.00 1 1
Selecting the measures tab will allow you to edit the quantity and cost if this has changed since the work order was created.
* indicates a required field
Save
Cancel
Save and Close
View Photo
Upload Photo
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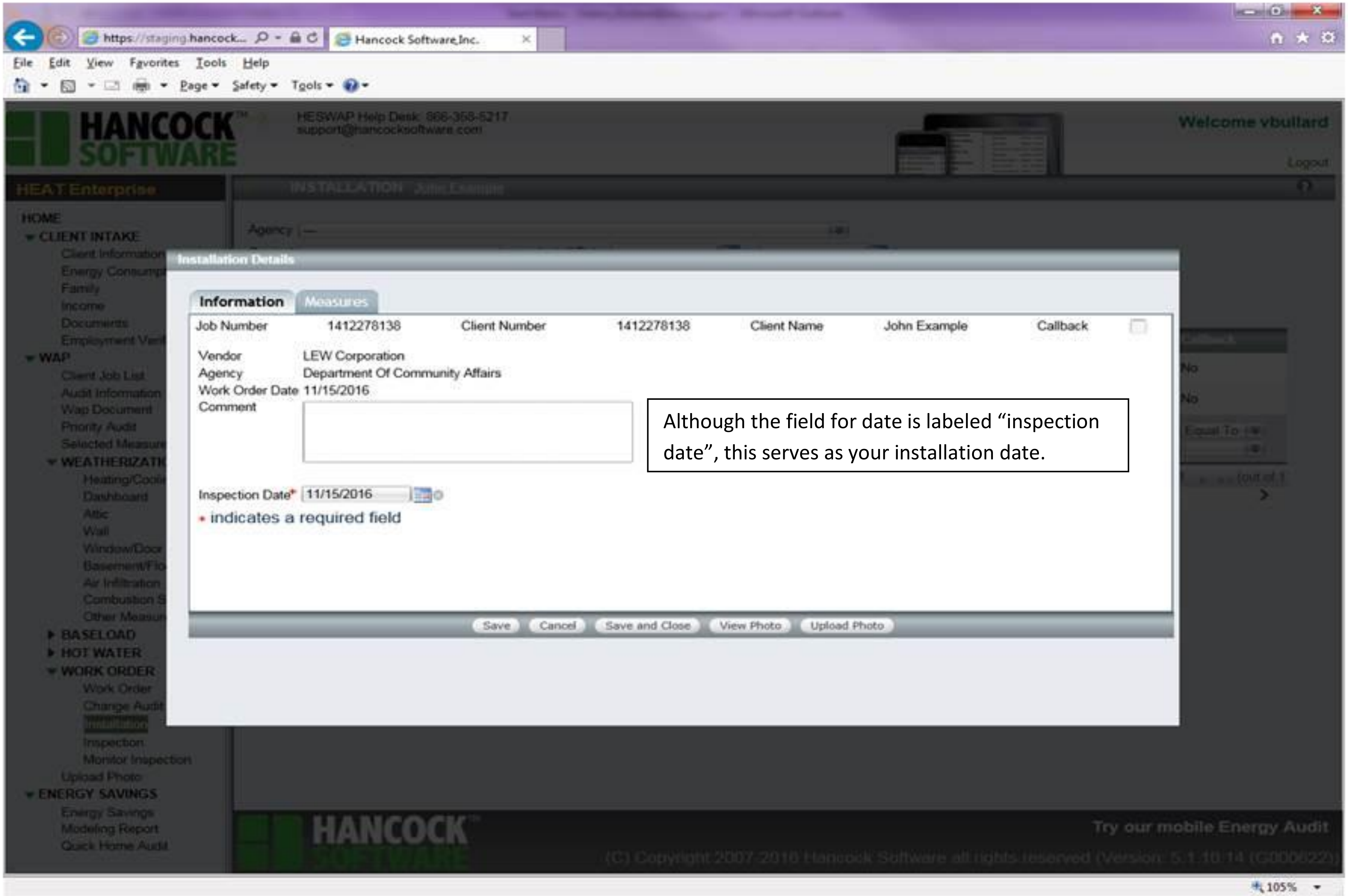

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Audit Information
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Priority Audit
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HOT WATER
WORK ORDER
Work Order
Change Audit
Inspection
Monitor Inspection
Upload Photo
ENERGY SAVINGS
Energy Savings
Modeling Report
Quick Home Audit
Installation Details
Information
Measures
Job Number 1412278138
Client Number 1412278138
Client Name John Example
Callback
Vendor LEW Corporation
Agency Department Of Community Affairs
Work Order Date 11/15/2016
Comment
Although the field for date is labeled “inspection date”, this serves as your installation date.
Inspection Date* 11/15/2016
* indicates a required field
Save
Cancel
Save and Close
View Photo
Upload Photo
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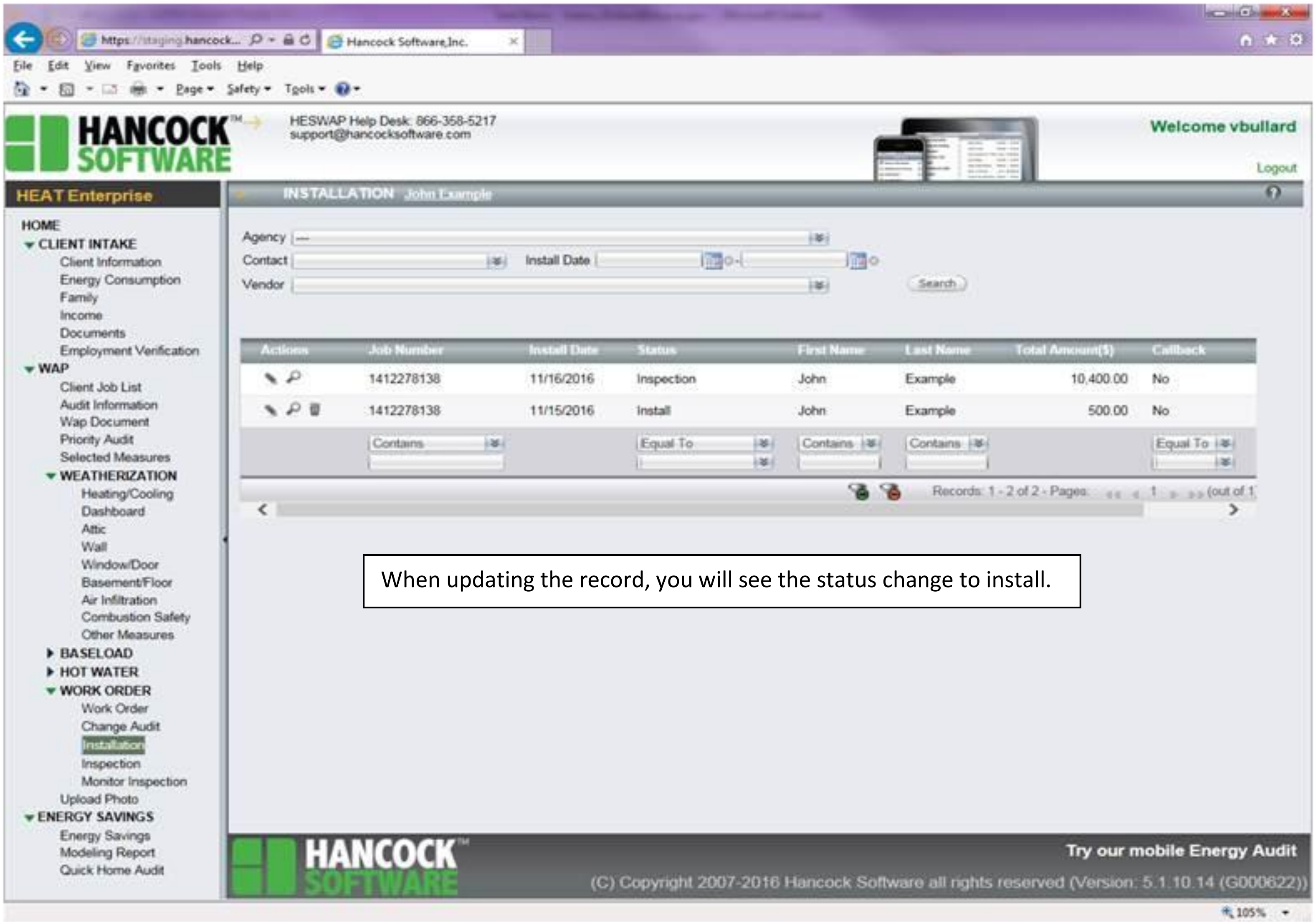
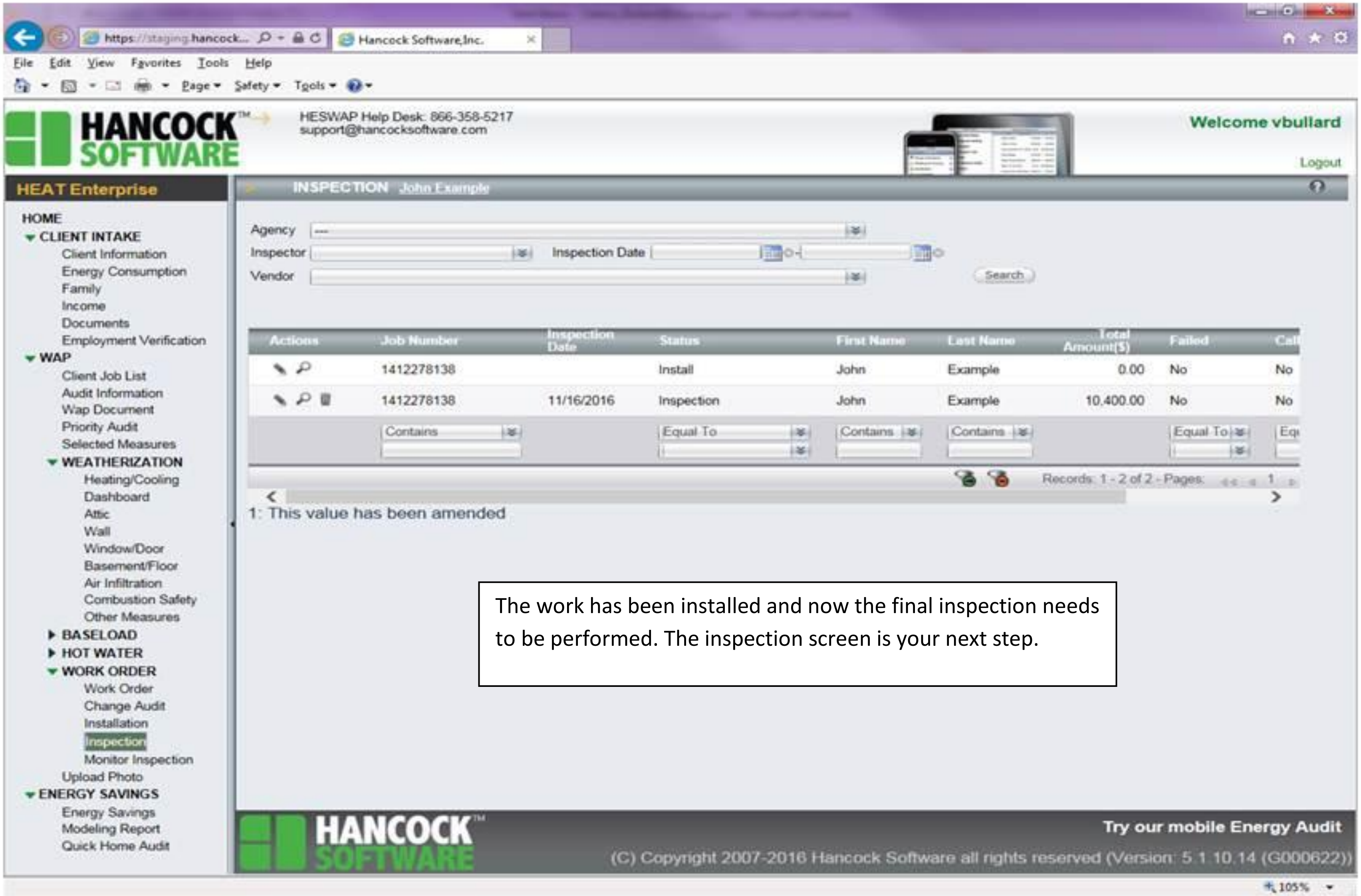
Technical

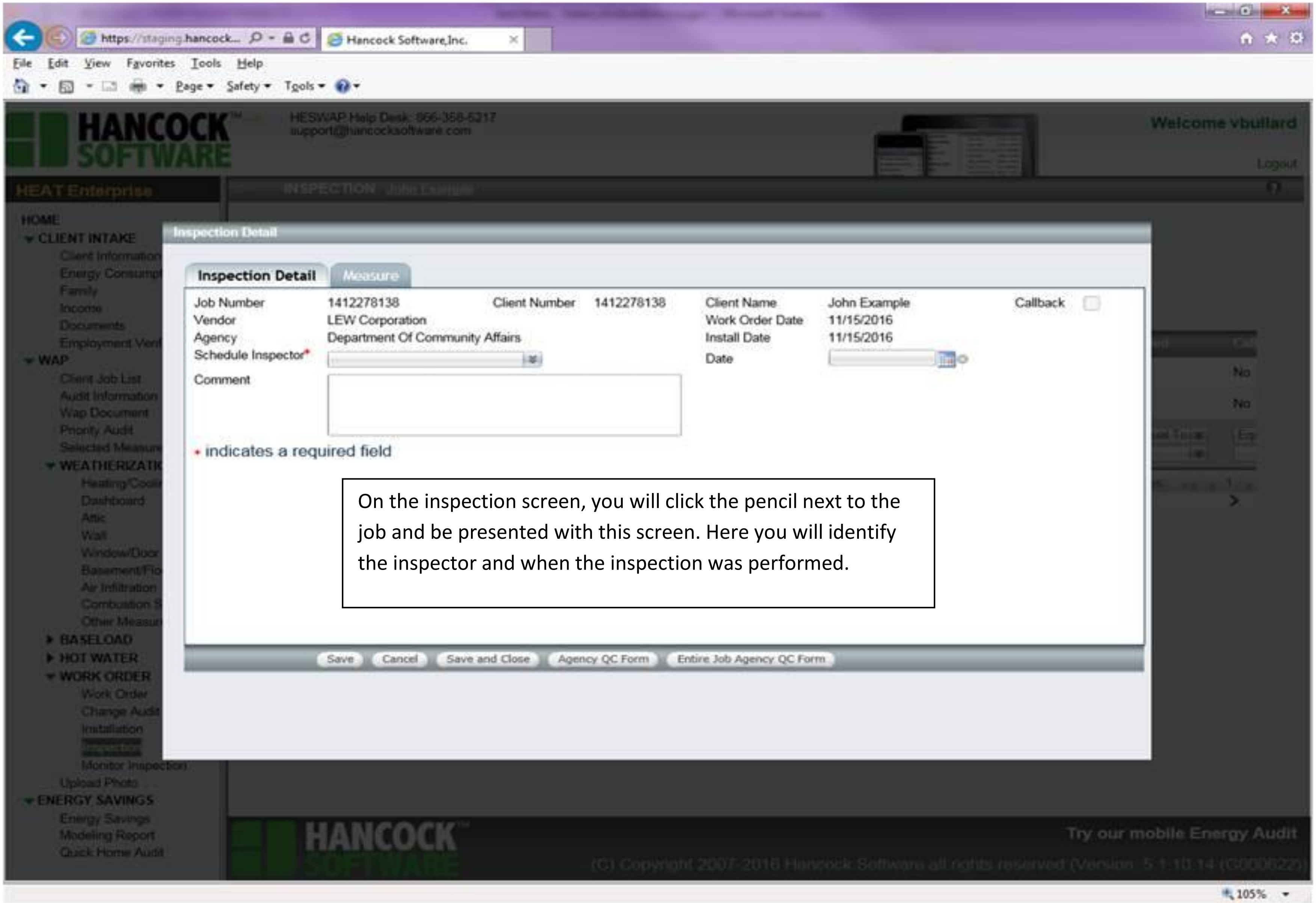


When updating the record, you will see the status change to install.

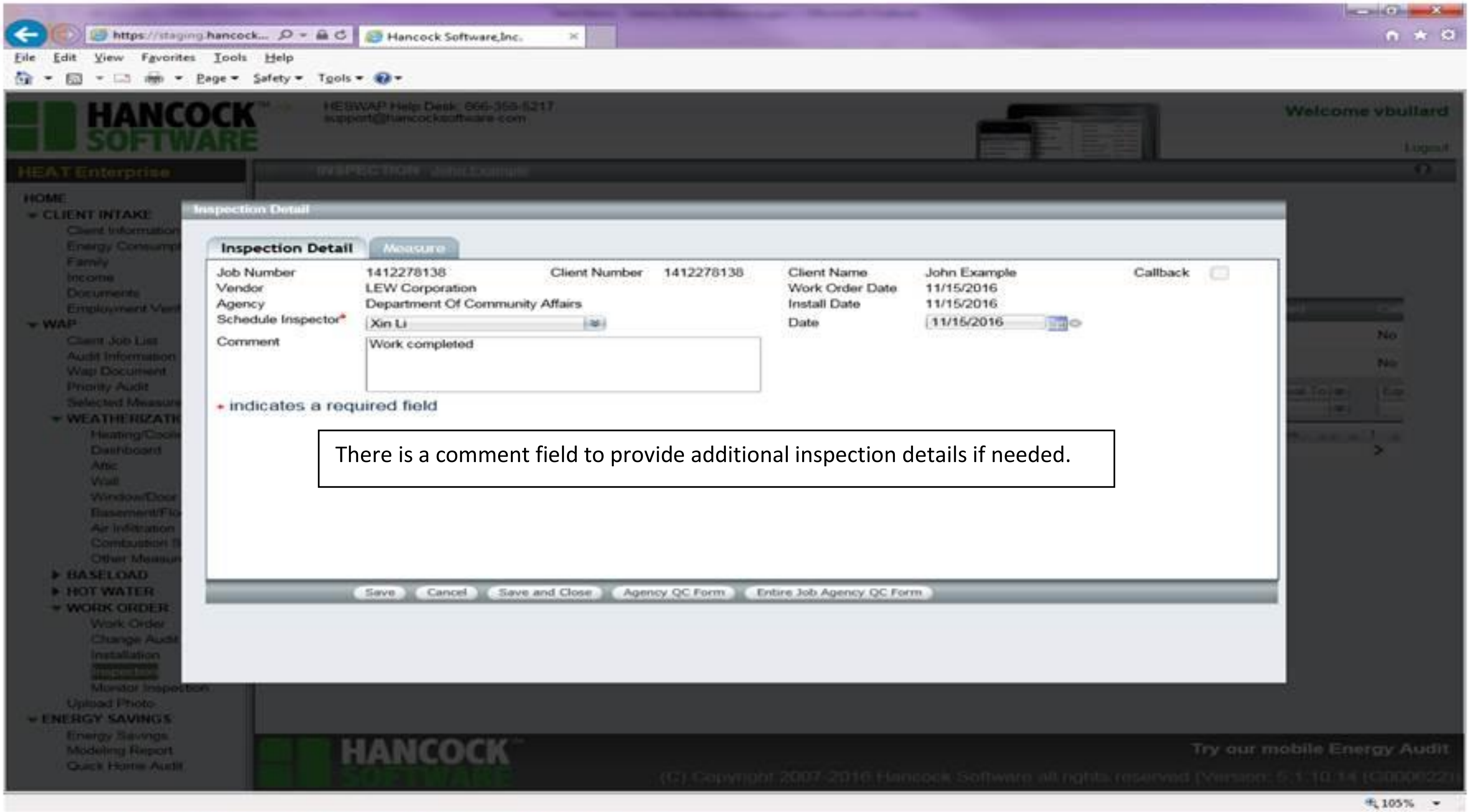
Technical



The work has been installed and now the final inspection needs to be performed. The inspection screen is your next step.



On the inspection screen, you will click the pencil next to the job and be presented with this screen. Here you will identify the inspector and when the inspection was performed.



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HOT WATER
WORK ORDER
ENERGY SAVINGS
Inspection Detail
Inspection Detail
Measure
Job Number 1412278138
Client Number 1412278138
Client Name John Example
Callback
Vendor LEW Corporation
Work Order Date 11/15/2016
Agency Department Of Community Affairs
Install Date 11/15/2016
Schedule Inspector* Xin Li
Date 11/15/2016
Comment
Work completed
* indicates a required field
There is a comment field to provide additional inspection details if needed.
Save
Cancel
Save and Close
Agency QC Form
Entire Job Agency QC Form
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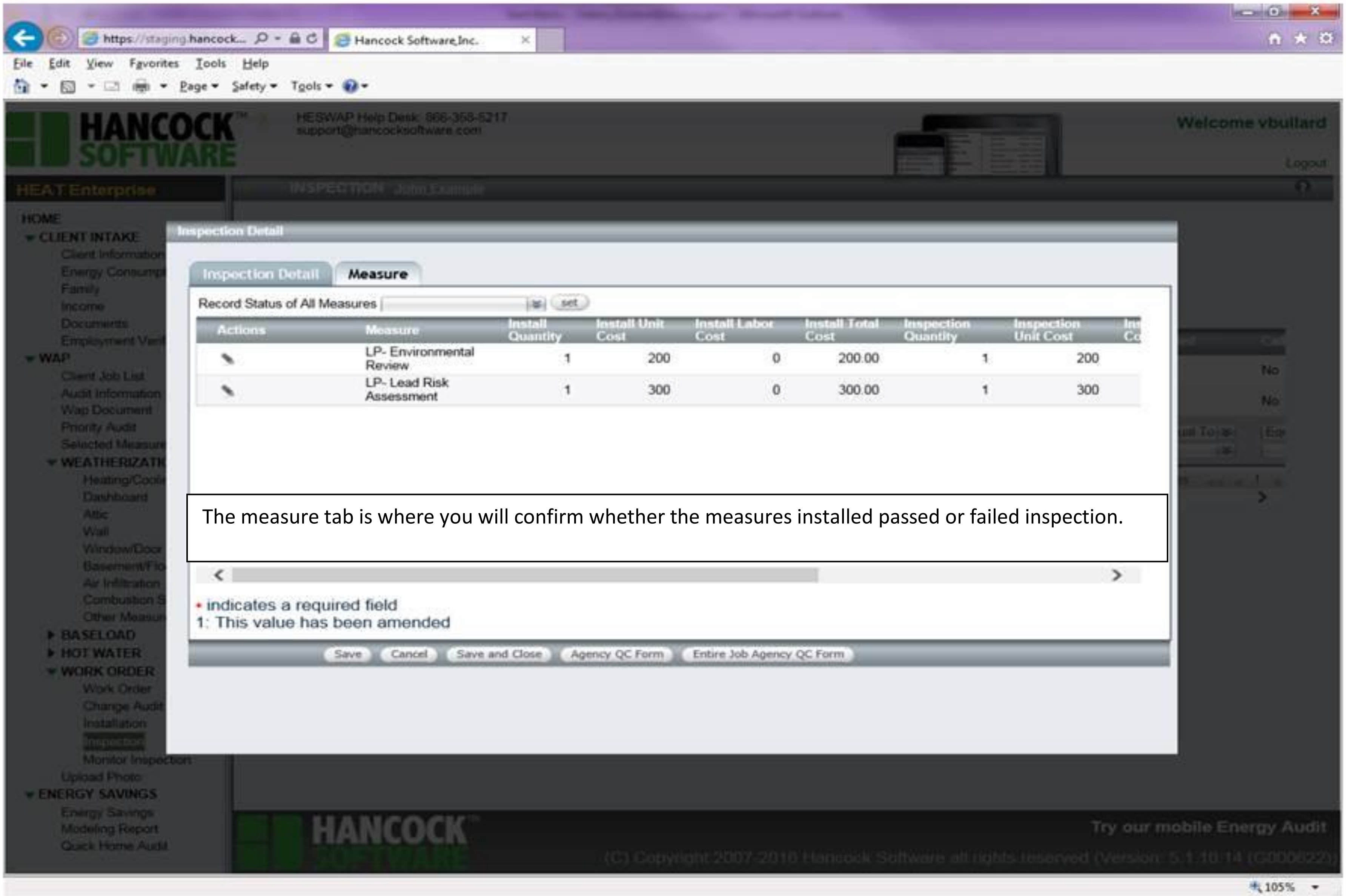
Print Options for Final Acceptance Form
Include Costs
Entire Job
Save
Cancel
Save and Close
Agency QC Form
Entire Job Agency QC Form



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Income
Documents
WAP
Client Job List
Audit Information
Wap Document
Priority Audit
WEATHERIZATION
Dashboard
Attic
Wall
BASELOAD
HOT WATER
WORK ORDER
Work Order
Change Audit
Installation
Monitor Inspection
Upload Photo
ENERGY SAVINGS
Energy Savings
Modeling Report
Quick Home Audit
Inspection Detail
Inspection Detail
Measure
Record Status of All Measures
set
Actions
Measure
Install Quantity
Install Unit Cost
Install Labor Cost
Install Total Cost
Inspection Quantity
Inspection Unit Cost
LP- Environmental Review
1
200
0
200.00
1
200
LP- Lead Risk Assessment
1
300
0
300.00
1
300
The measure tab is where you will confirm whether the measures installed passed or failed inspection.
• indicates a required field
1: This value has been amended
Save
Cancel
Save and Close
Agency QC Form
Entire Job Agency QC Form
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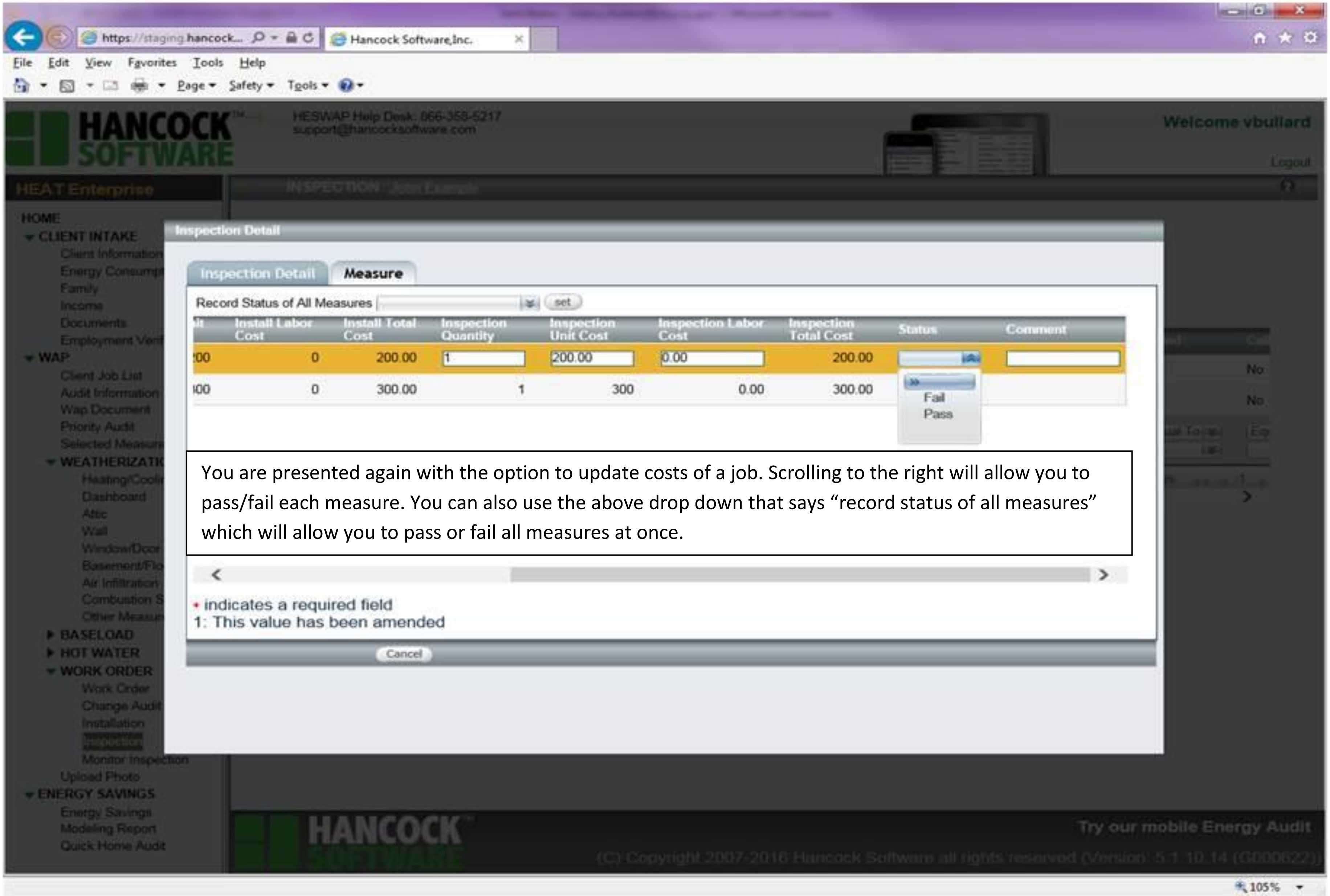
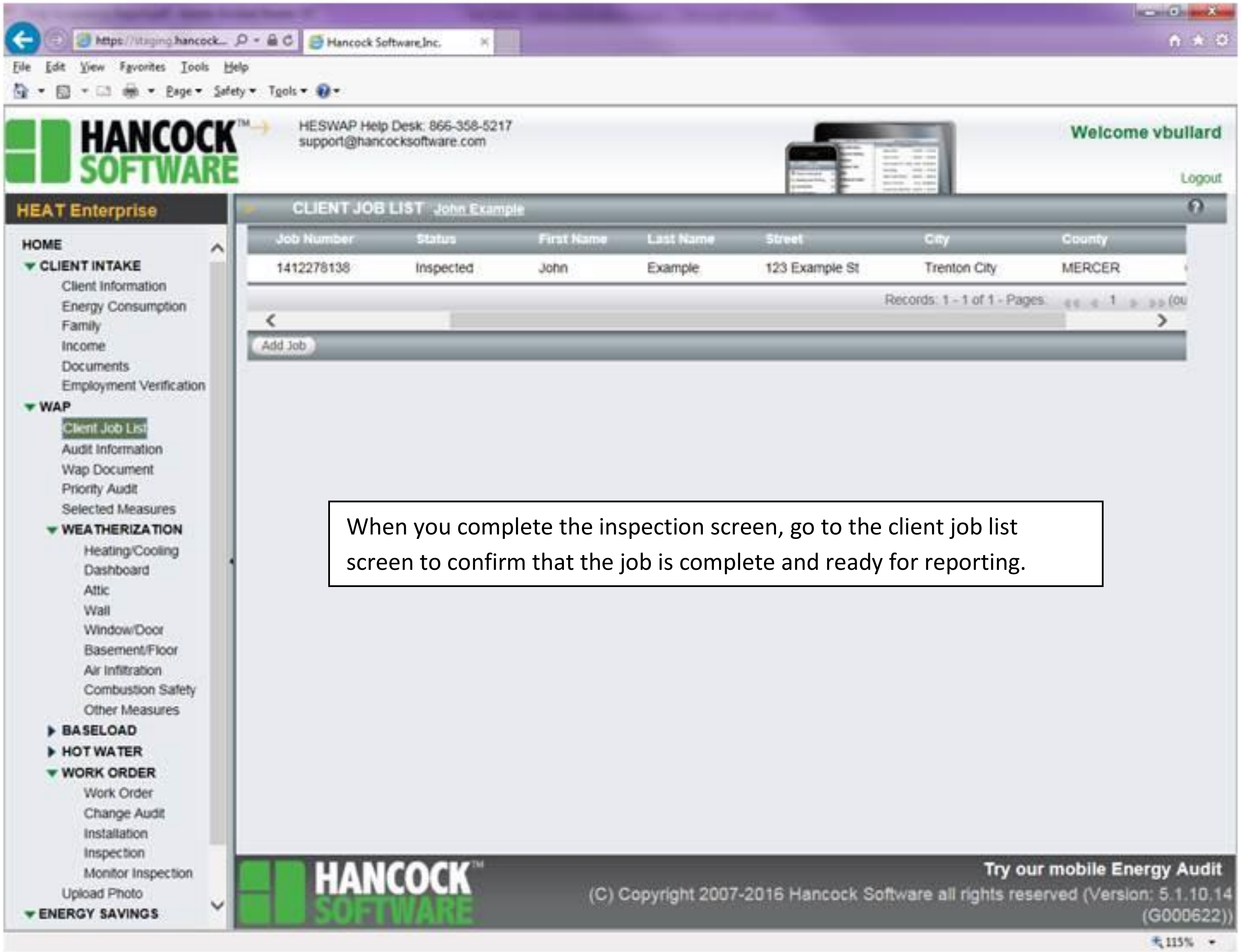


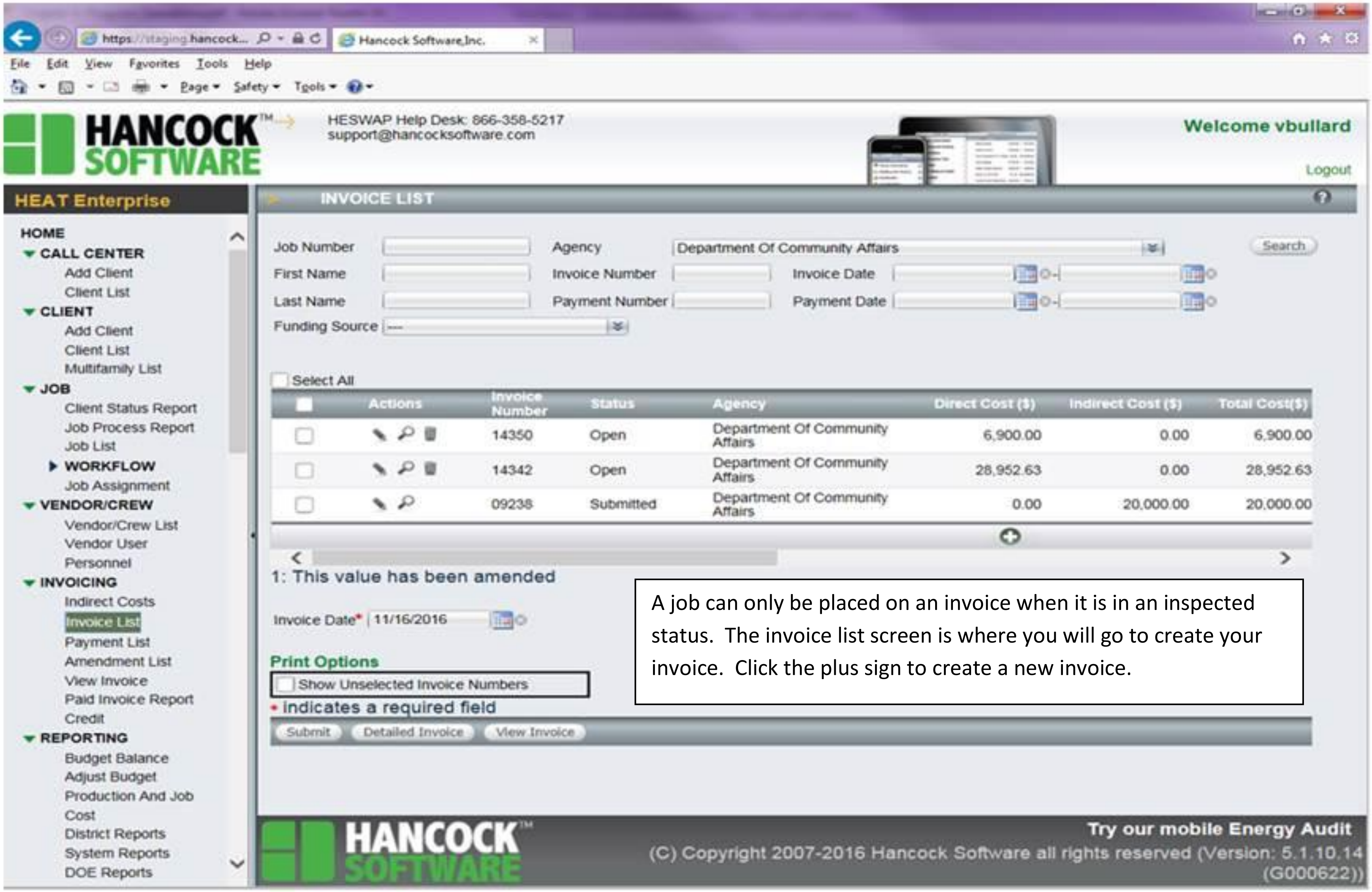
You are presented again with the option to update costs of a job. Scrolling to the right will allow you to pass/fail each measure. You can also use the above drop down that says "record status of all measures" which will allow you to pass or fail all measures at once.

Technical



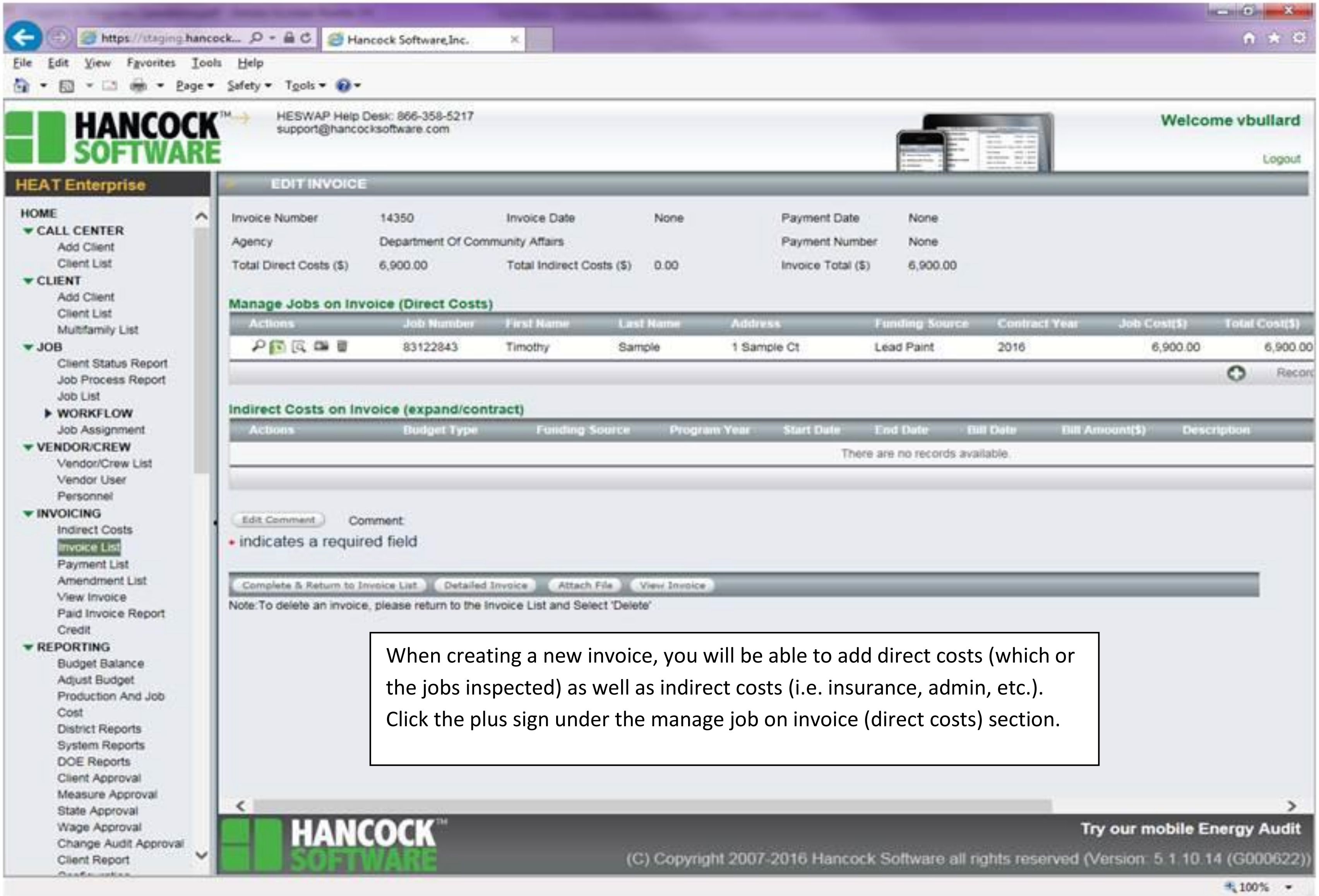
When you complete the inspection screen, go to the client job list screen to confirm that the job is complete and ready for reporting.

Fiscal



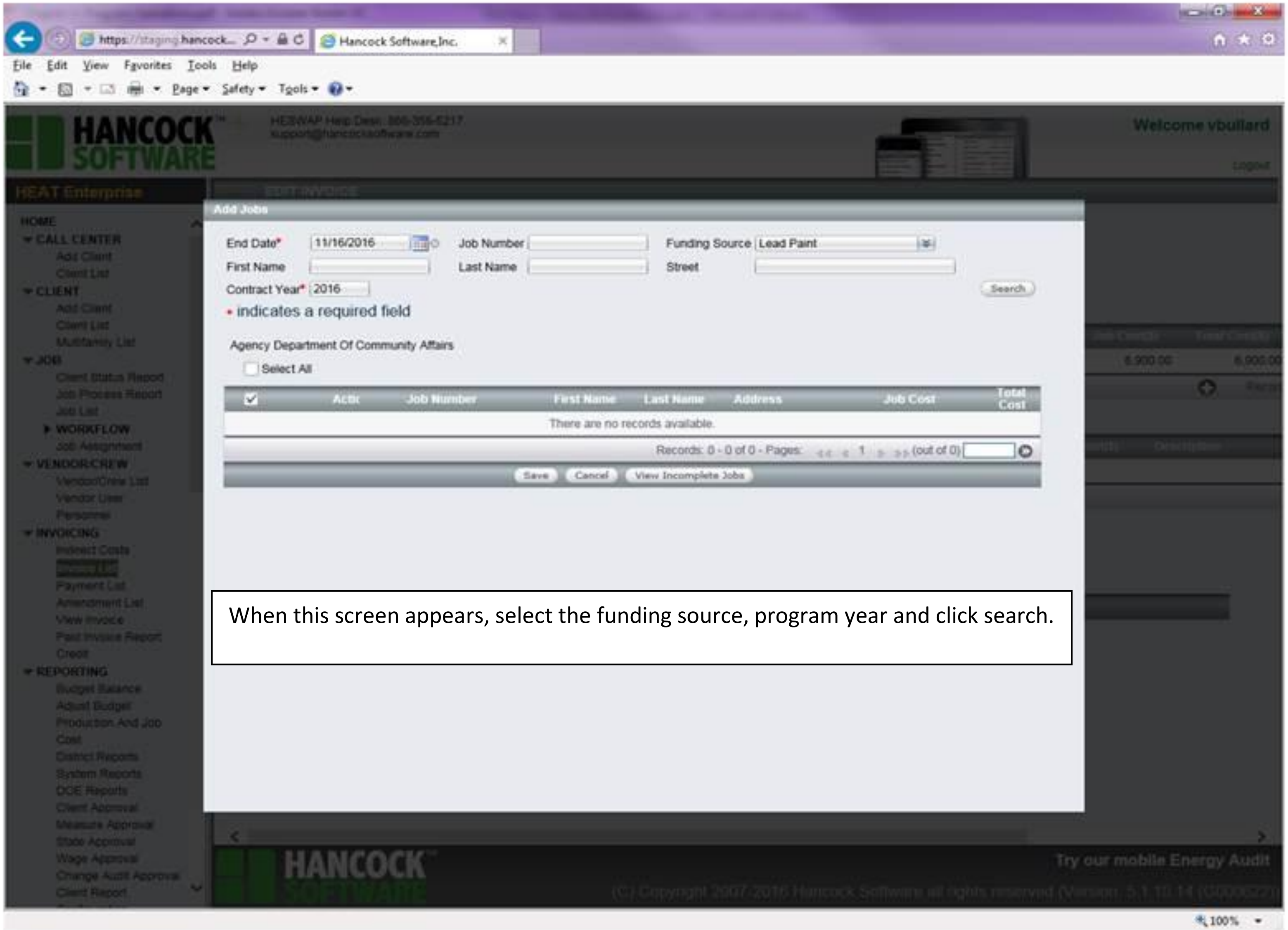
A job can only be placed on an invoice when it is in an inspected status. The invoice list screen is where you will go to create your invoice. Click the plus sign to create a new invoice.

Fiscal



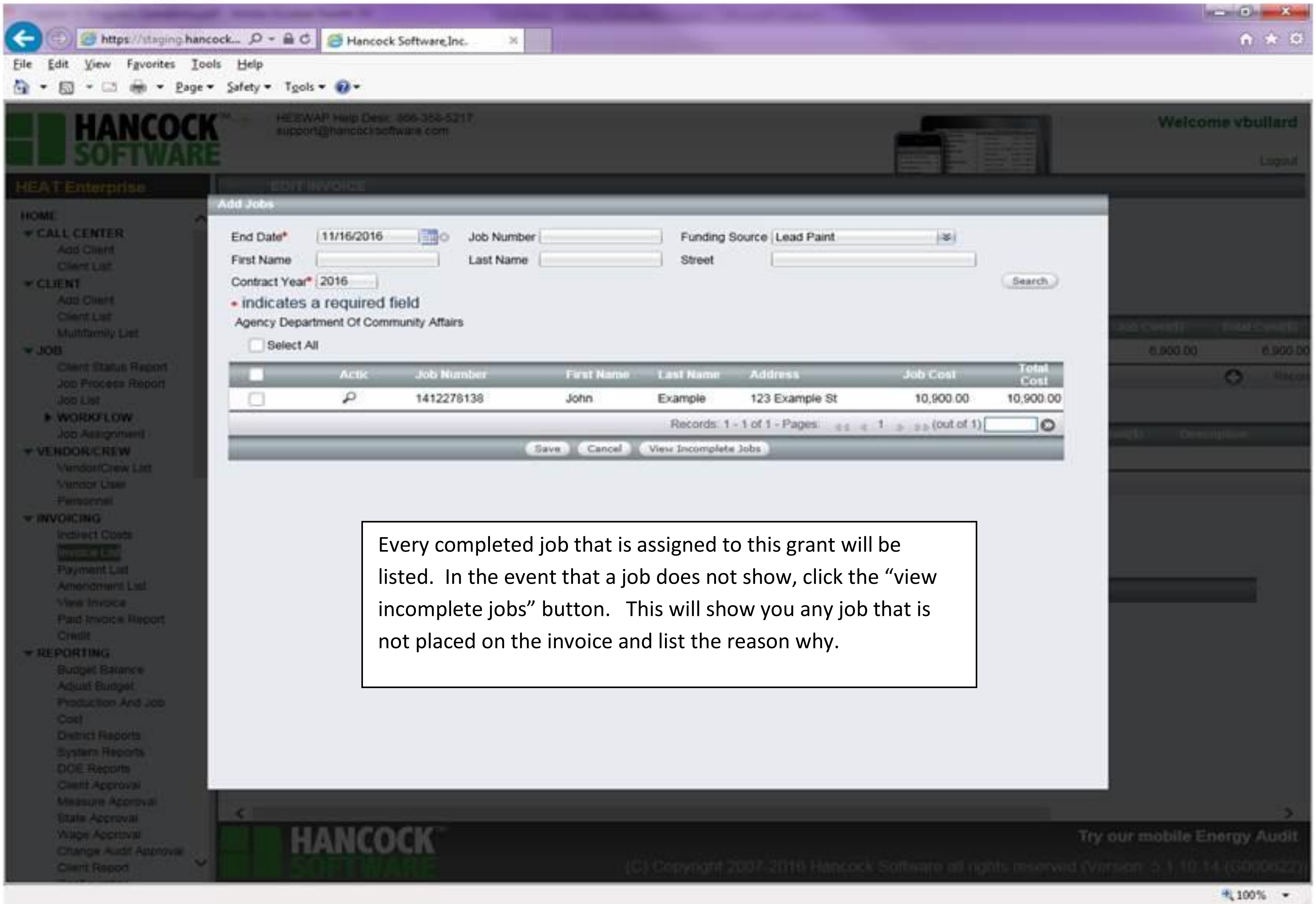
When creating a new invoice, you will be able to add direct costs (which or the jobs inspected) as well as indirect costs (i.e. insurance, admin, etc.). Click the plus sign under the manage job on invoice (direct costs) section.

Fiscal



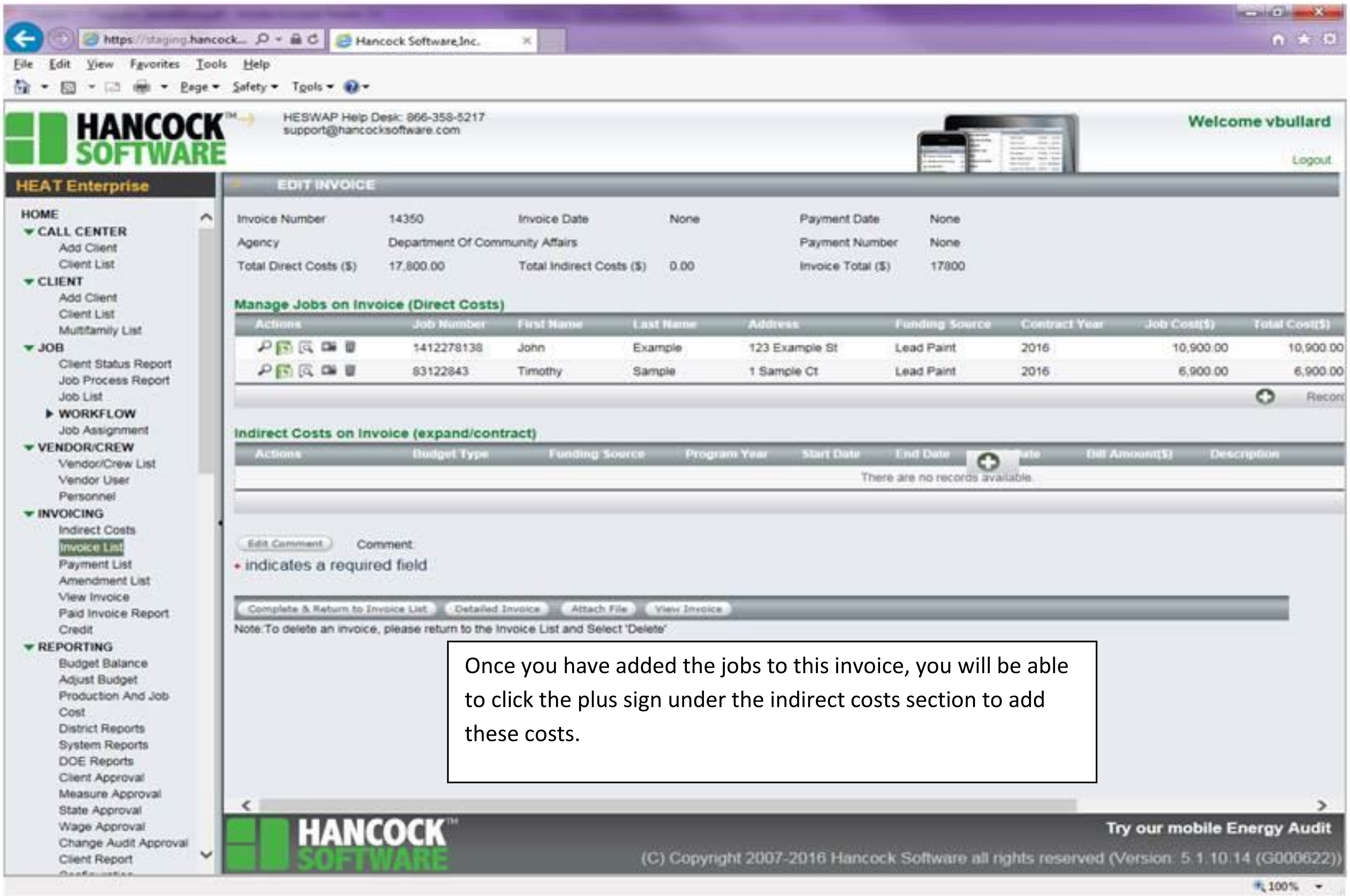
When this screen appears, select the funding source, program year and click search.

Fiscal



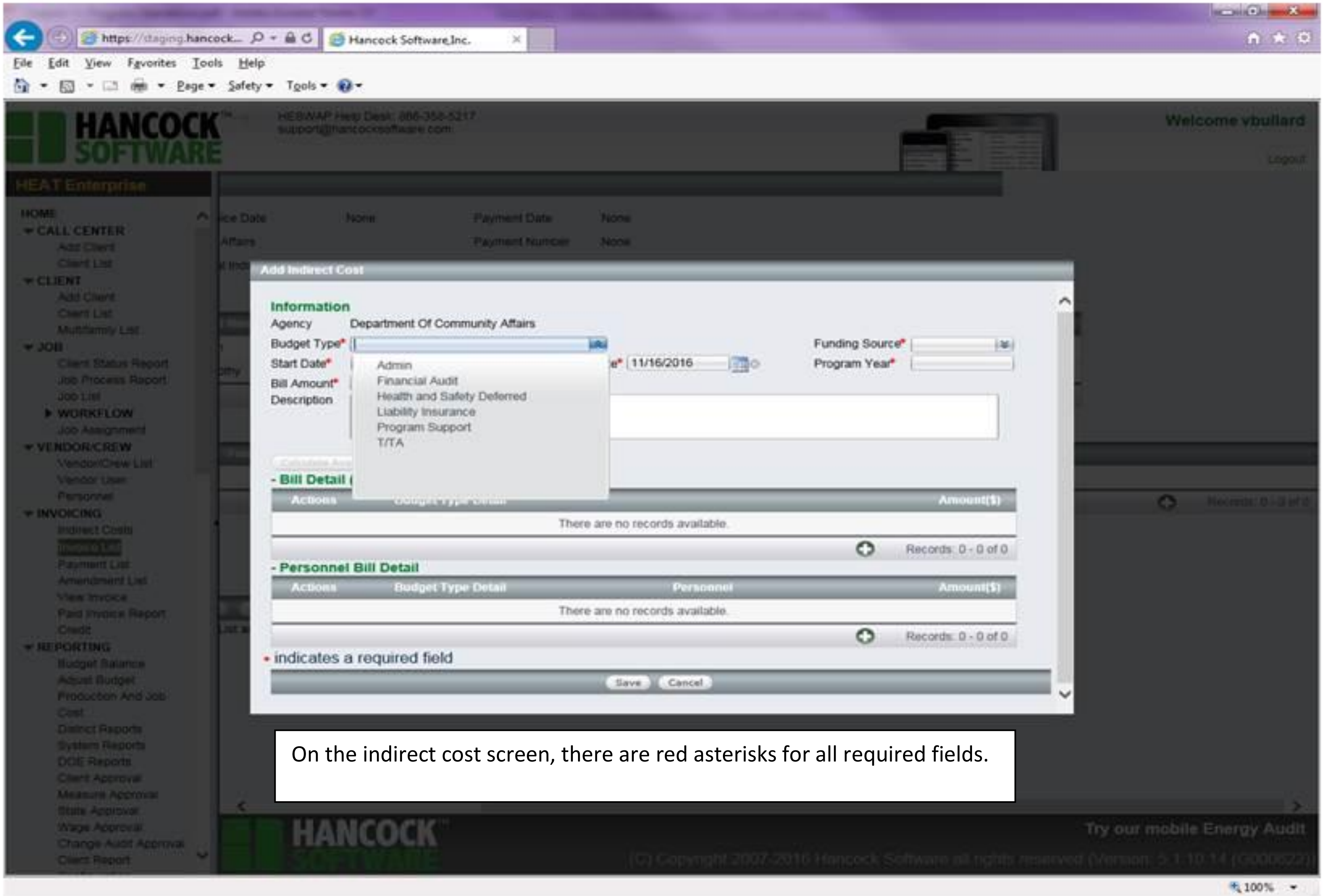
Every completed job that is assigned to this grant will be listed. In the event that a job does not show, click the "view incomplete jobs" button. This will show you any job that is not placed on the invoice and list the reason why.

Fiscal



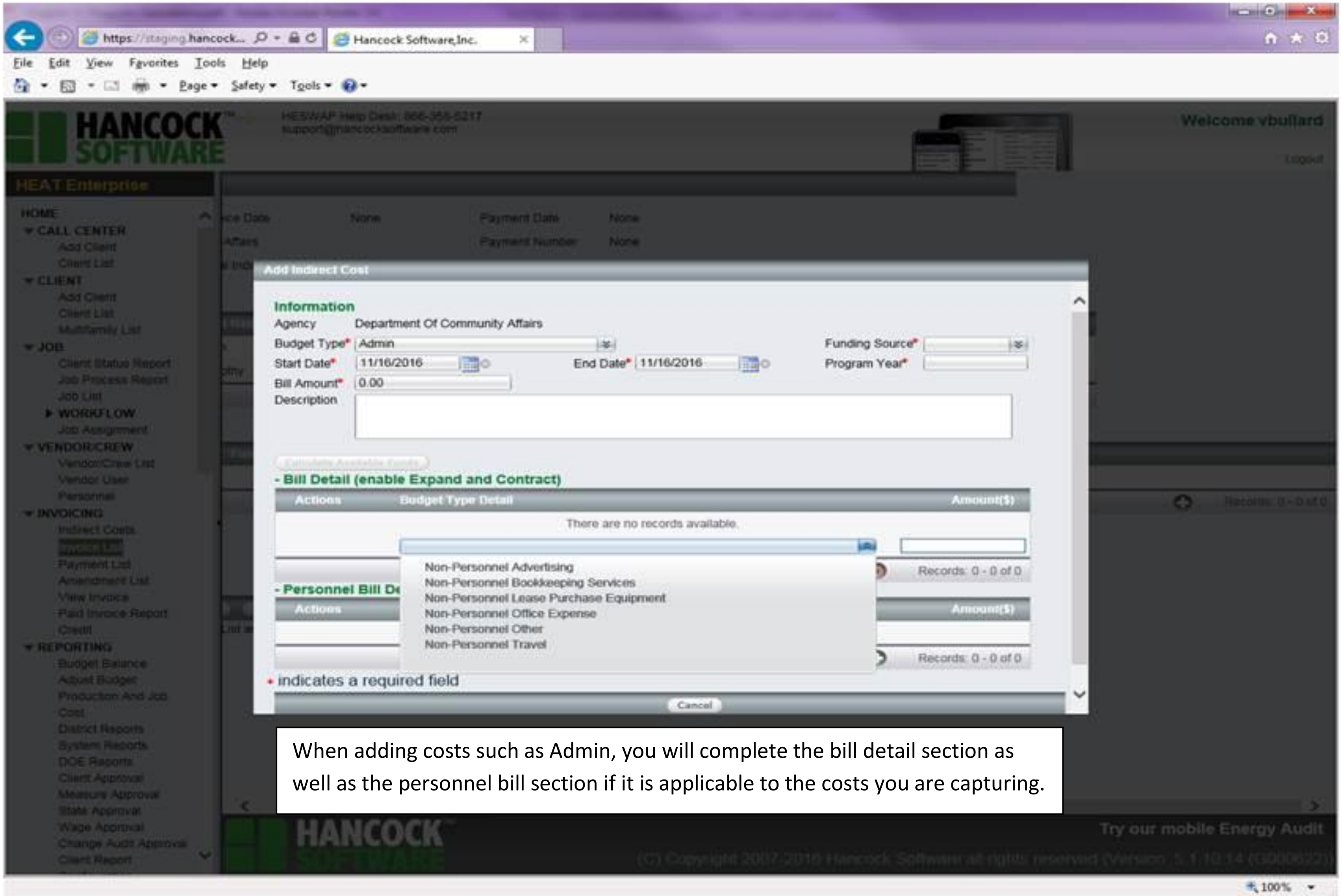
Once you have added the jobs to this invoice, you will be able to click the plus sign under the indirect costs section to add these costs.

Fiscal



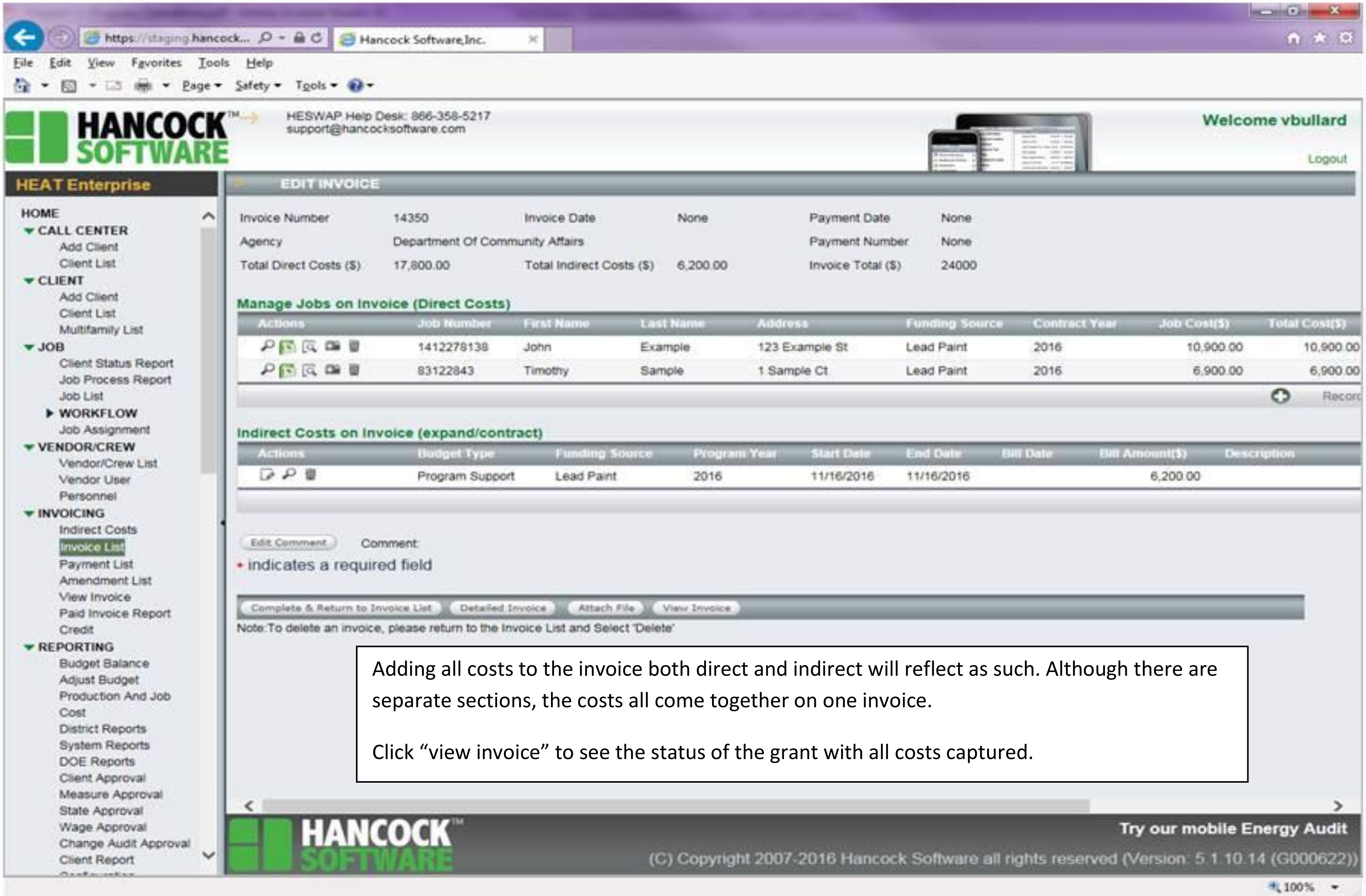
On the indirect cost screen, there are red asterisks for all required fields.

Fiscal



When adding costs such as Admin, you will complete the bill detail section as well as the personnel bill section if it is applicable to the costs you are capturing.

Fiscal



Adding all costs to the invoice both direct and indirect will reflect as such. Although there are separate sections, the costs all come together on one invoice.

Click "view invoice" to see the status of the grant with all costs captured.

Fiscal

Export Panel:

WEATHERIZATION ASSISTANCE PROGRAM

REQUEST FOR PAYMENT & STATISTICAL REPORT

Report Created: 11/16/2016

Report Date Range: -

Invoice Numbers: 14350
Program Year: 2016 Contract No: XXXX
Provider: Department Of Community Affairs Contact Person: Angie Armand Grant: Lead Paint
Address: 101 S. Broad Street Report Date: 11/16/2016
Trenton NJ 08625 State: NJ Zip: 08625
Phone: 609-633-6280 Fax: 609-292-9798 E-Mail: AArmand@dca.state.nj.us

Cost Category	Total Budget	Previously Requested Amount	This Period Requested Amount	Current Year Budget Remaining	Current Carry Over Remaining	Previous Carry Over Remaining	Advance	Contract Remaining	Total Requested To Date	Contract Amount Remaining	This Period Payment (Invoice Amount)
Admin	$20,000.00	$0.00	$0.00	$20,000.00	$0.00	$0.00	$0.00	$20,000.00	$0.00	$20,000.00	$0.00
T/TA	$5,000.00	$0.00	$0.00	$5,000.00	$0.00	$0.00	$0.00	$5,000.00	$0.00	$5,000.00	$0.00
Weatherization Materials	$100,000.00	$0.00	$17,800.00	$82,200.00	$0.00	$0.00	$0.00	$82,200.00	$17,800.00	$82,200.00	$17,800.00
Health & Safety	$100,000.00	$0.00	$0.00	$100,000.00	$0.00	$0.00	$0.00	$100,000.00	$0.00	$100,000.00	$0.00
Liability Insurance	$100,000.00	$0.00	$0.00	$100,000.00	$0.00	$0.00	$0.00	$100,000.00	$0.00	$100,000.00	$0.00
Financial Audit	$100,000.00	$0.00	$0.00	$100,000.00	$0.00	$0.00	$0.00	$100,000.00	$0.00	$100,000.00	$0.00
Program Support	$100,000.00	$0.00	$6,200.00	$93,800.00	$0.00	$0.00	$0.00	$93,800.00	$6,200.00	$93,800.00	$6,200.00
Health and Safety Deferred	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00	$0.00
Total	$525,000.00	$0.00	$24,000.00	$501,000.00	$0.00	$0.00	$0.00	$501,000.00	$24,000.00	$501,000.00	$24,000.00

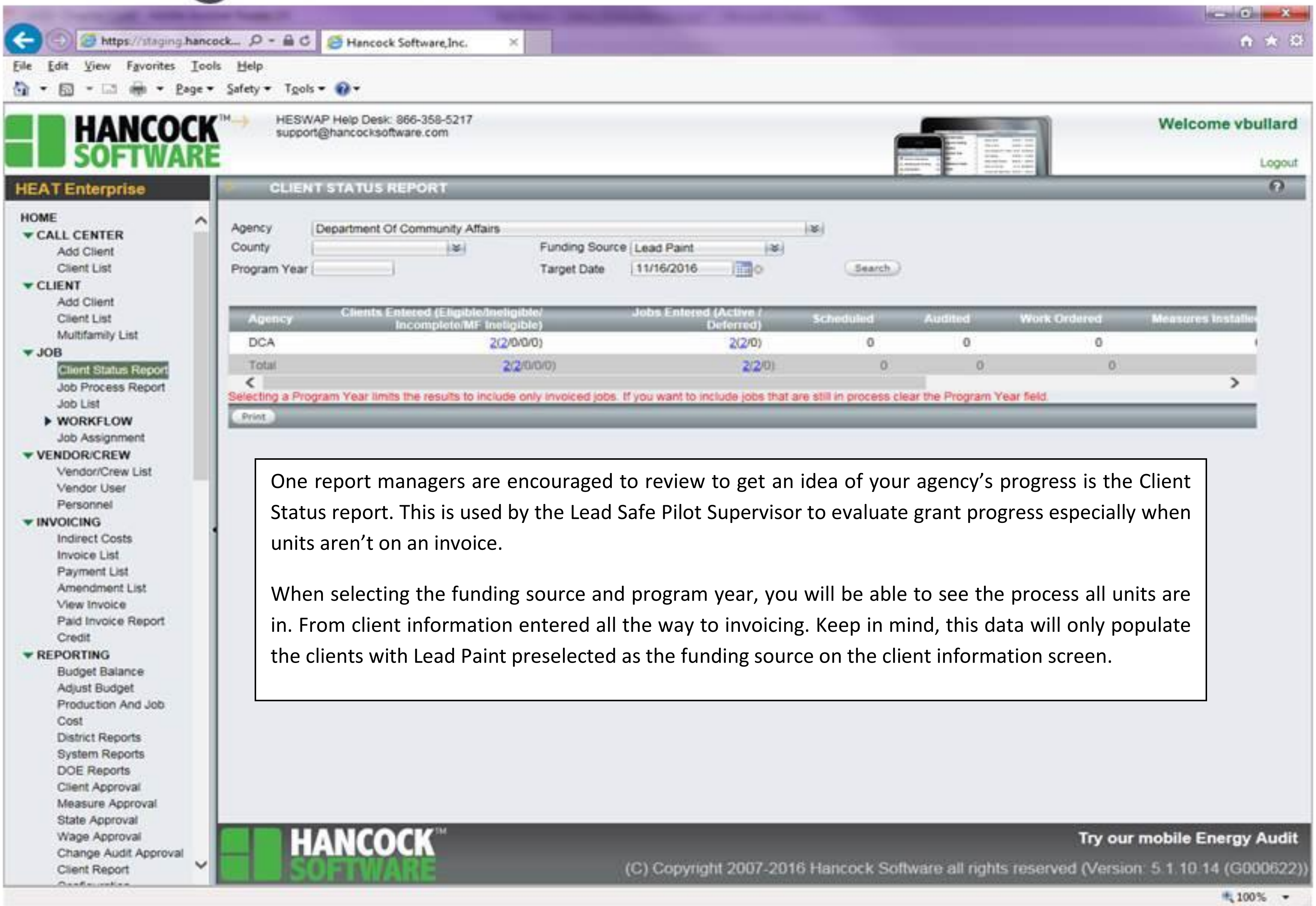
Certification I certify that all expenditures requested above were made in accordance with the contractual agreement with DCA for administration of the Weatherization Assistance Program.

Signature of Authorized Agency Representative Date

DCA Signature Date

This report shows a number of fields such as the amount being charged on this invoice, the budget amount and balance as well as the previously reported amount of funds expended.

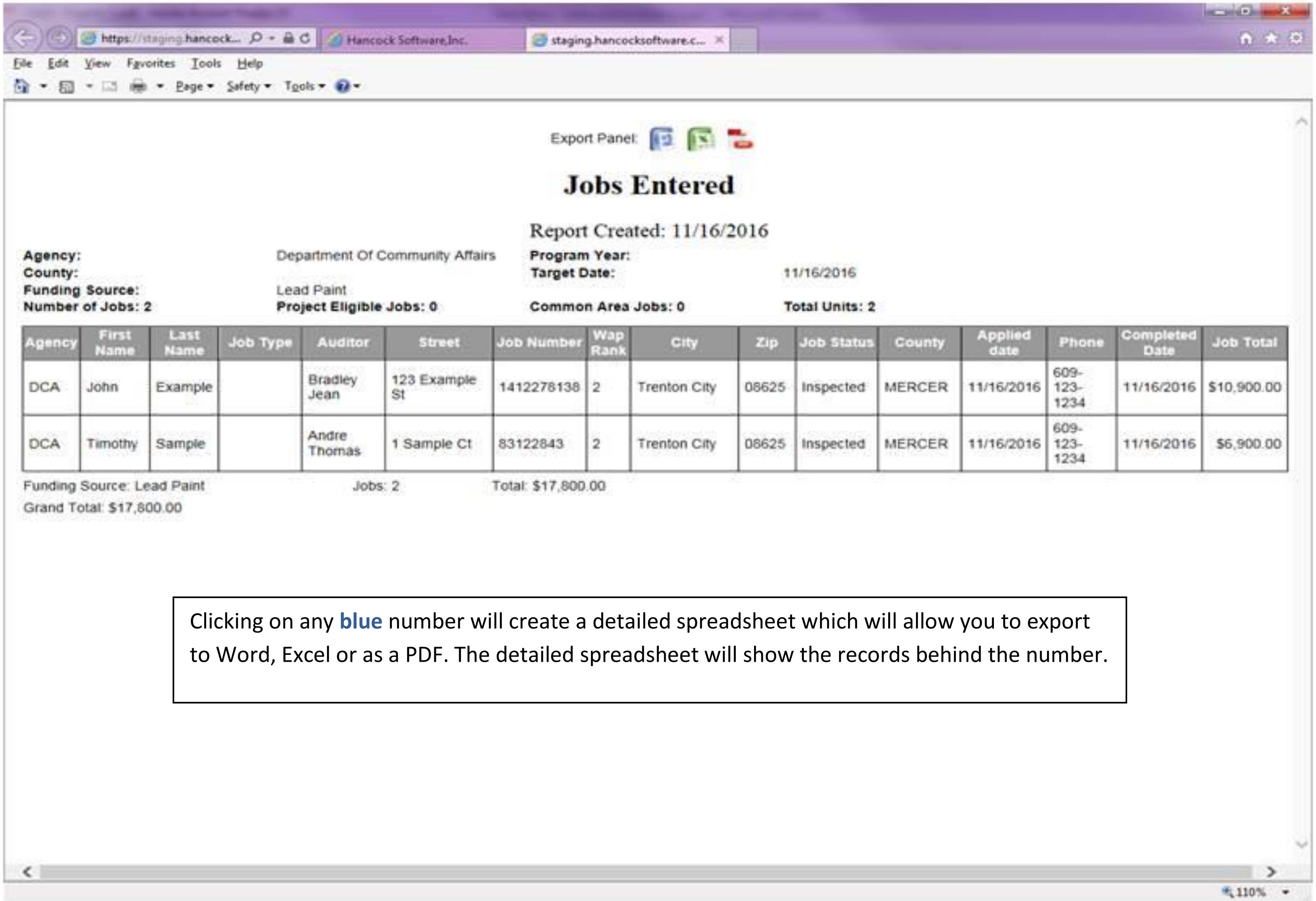
Management



One report managers are encouraged to review to get an idea of your agency's progress is the Client Status report. This is used by the Lead Safe Pilot Supervisor to evaluate grant progress especially when units aren't on an invoice.

When selecting the funding source and program year, you will be able to see the process all units are in. From client information entered all the way to invoicing. Keep in mind, this data will only populate the clients with Lead Paint preselected as the funding source on the client information screen.

Management



Export Panel:

Jobs Entered

Report Created: 11/16/2016

Agency:	Department Of Community Affairs	**Program Year:**	
County:		**Target Date:**	11/16/2016
Funding Source:	Lead Paint		
Number of Jobs: 2	**Project Eligible Jobs: 0**	**Common Area Jobs: 0**	**Total Units: 2**

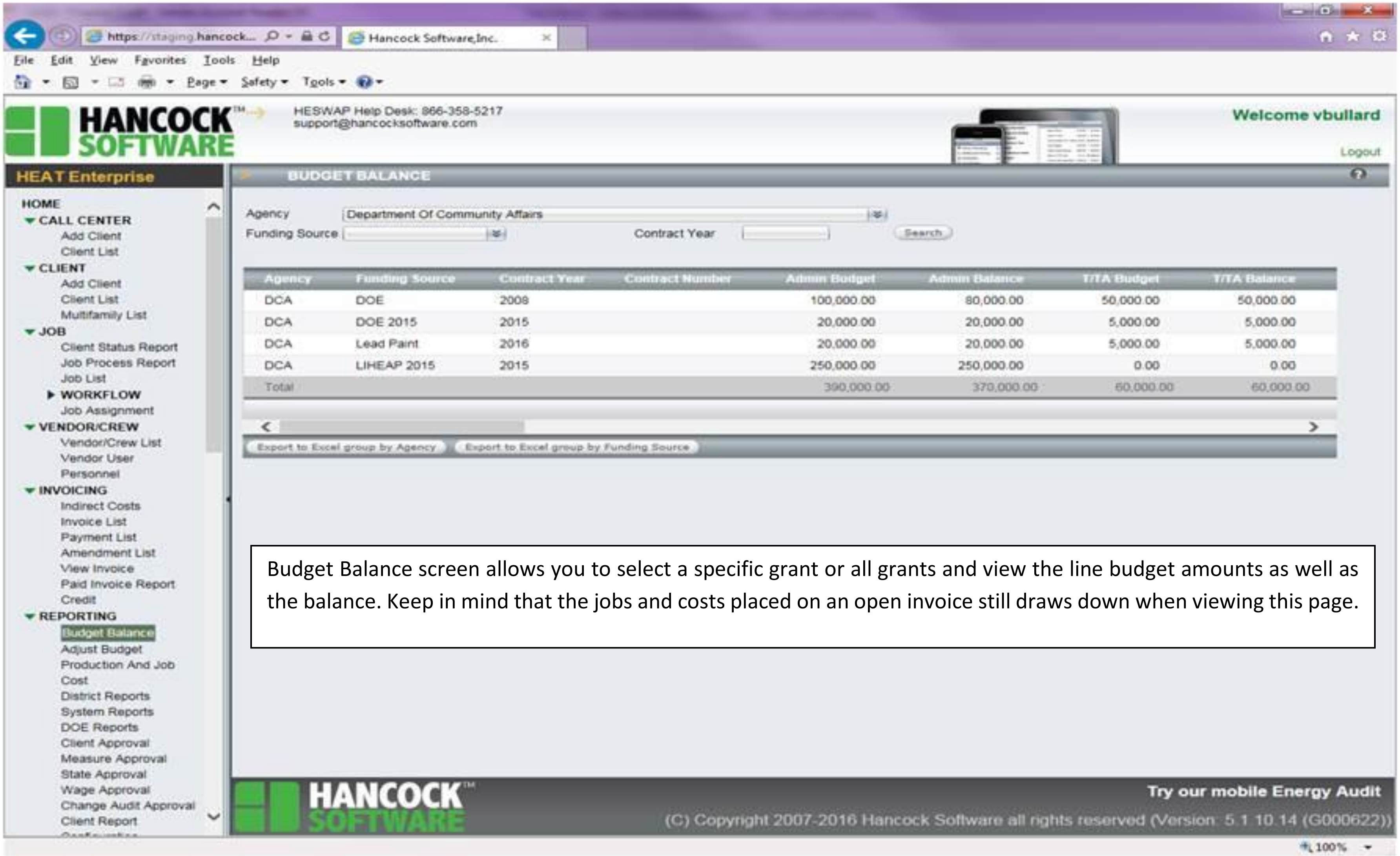
Agency	First Name	Last Name	Job Type	Auditor	Street	Job Number	Wap Rank	City	Zip	Job Status	County	Applied date	Phone	Completed Date	Job Total
DCA	John	Example		Bradley Jean	123 Example St	1412278138	2	Trenton City	08625	Inspected	MERCER	11/16/2016	609-123-1234	11/16/2016	$10,900.00
DCA	Timothy	Sample		Andre Thomas	1 Sample Ct	83122843	2	Trenton City	08625	Inspected	MERCER	11/16/2016	609-123-1234	11/16/2016	$6,900.00

Funding Source: Lead Paint Jobs: 2 Total: $17,800.00

Grand Total: $17,800.00

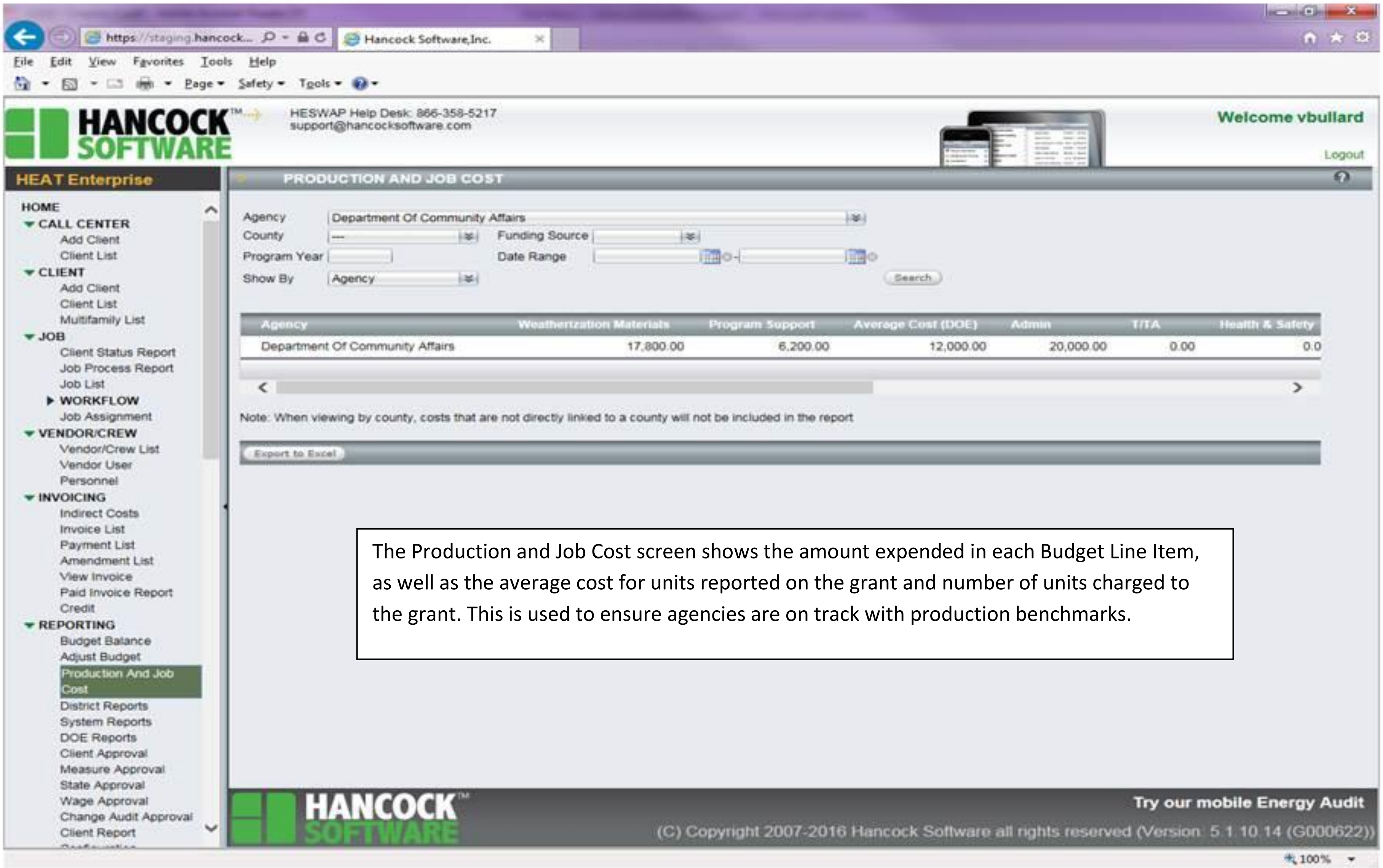
Clicking on any **blue** number will create a detailed spreadsheet which will allow you to export to Word, Excel or as a PDF. The detailed spreadsheet will show the records behind the number.

Budget Balance



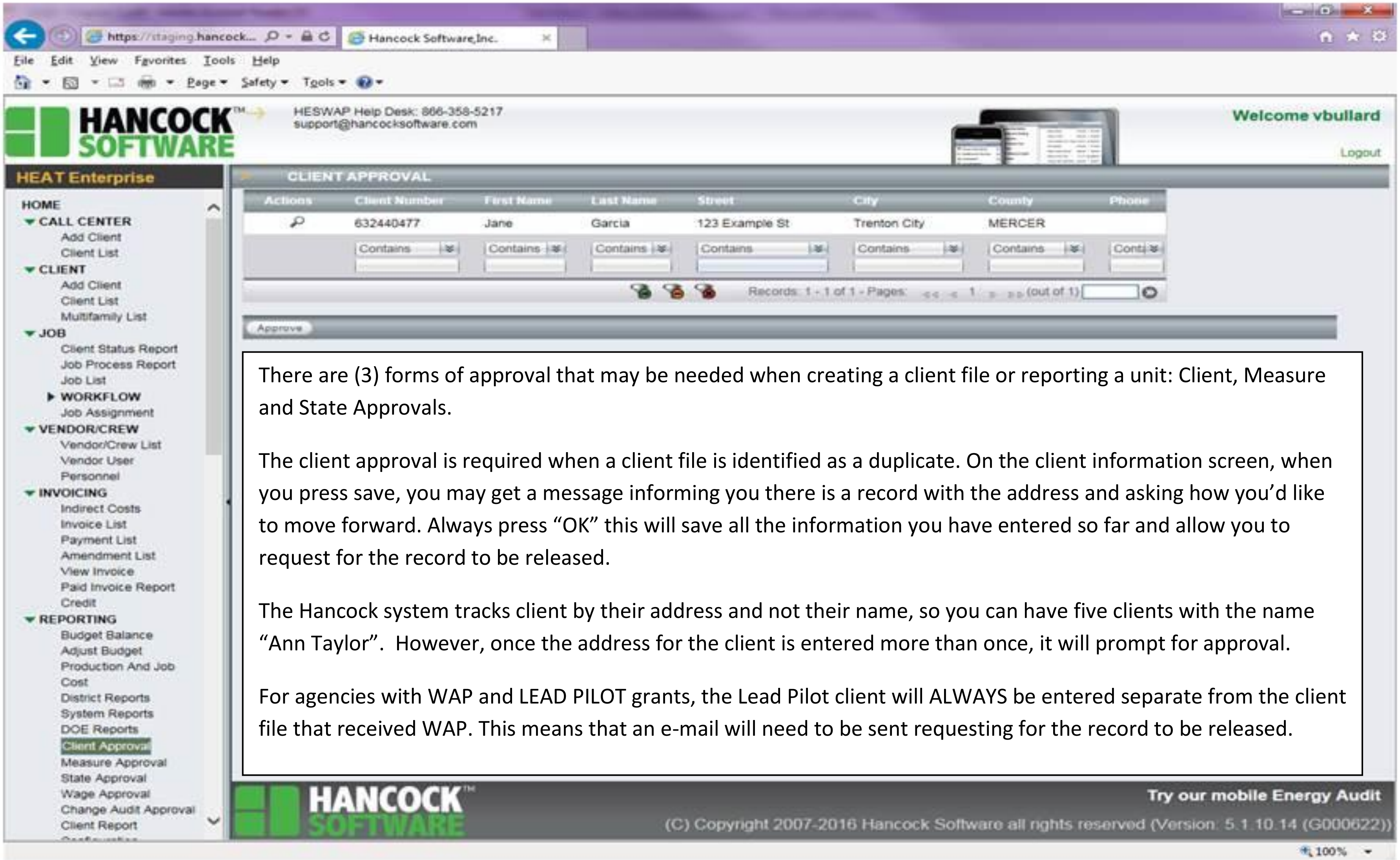
Budget Balance screen allows you to select a specific grant or all grants and view the line budget amounts as well as the balance. Keep in mind that the jobs and costs placed on an open invoice still draws down when viewing this page.

Production & Job Cost



The Production and Job Cost screen shows the amount expended in each Budget Line Item, as well as the average cost for units reported on the grant and number of units charged to the grant. This is used to ensure agencies are on track with production benchmarks.

Client Approval



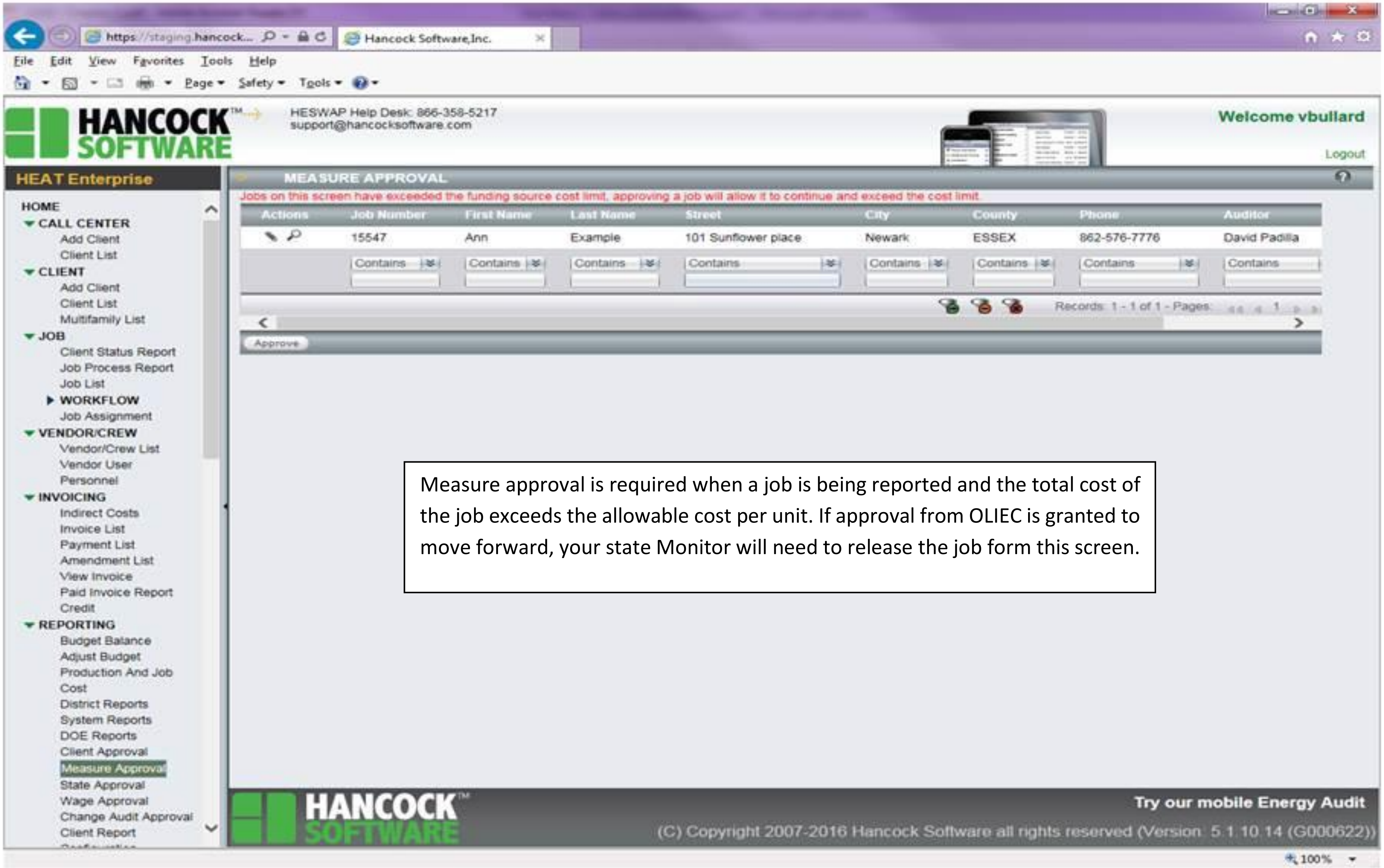
There are (3) forms of approval that may be needed when creating a client file or reporting a unit: Client, Measure and State Approvals.

The client approval is required when a client file is identified as a duplicate. On the client information screen, when you press save, you may get a message informing you there is a record with the address and asking how you'd like to move forward. Always press "OK" this will save all the information you have entered so far and allow you to request for the record to be released.

The Hancock system tracks client by their address and not their name, so you can have five clients with the name "Ann Taylor". However, once the address for the client is entered more than once, it will prompt for approval.

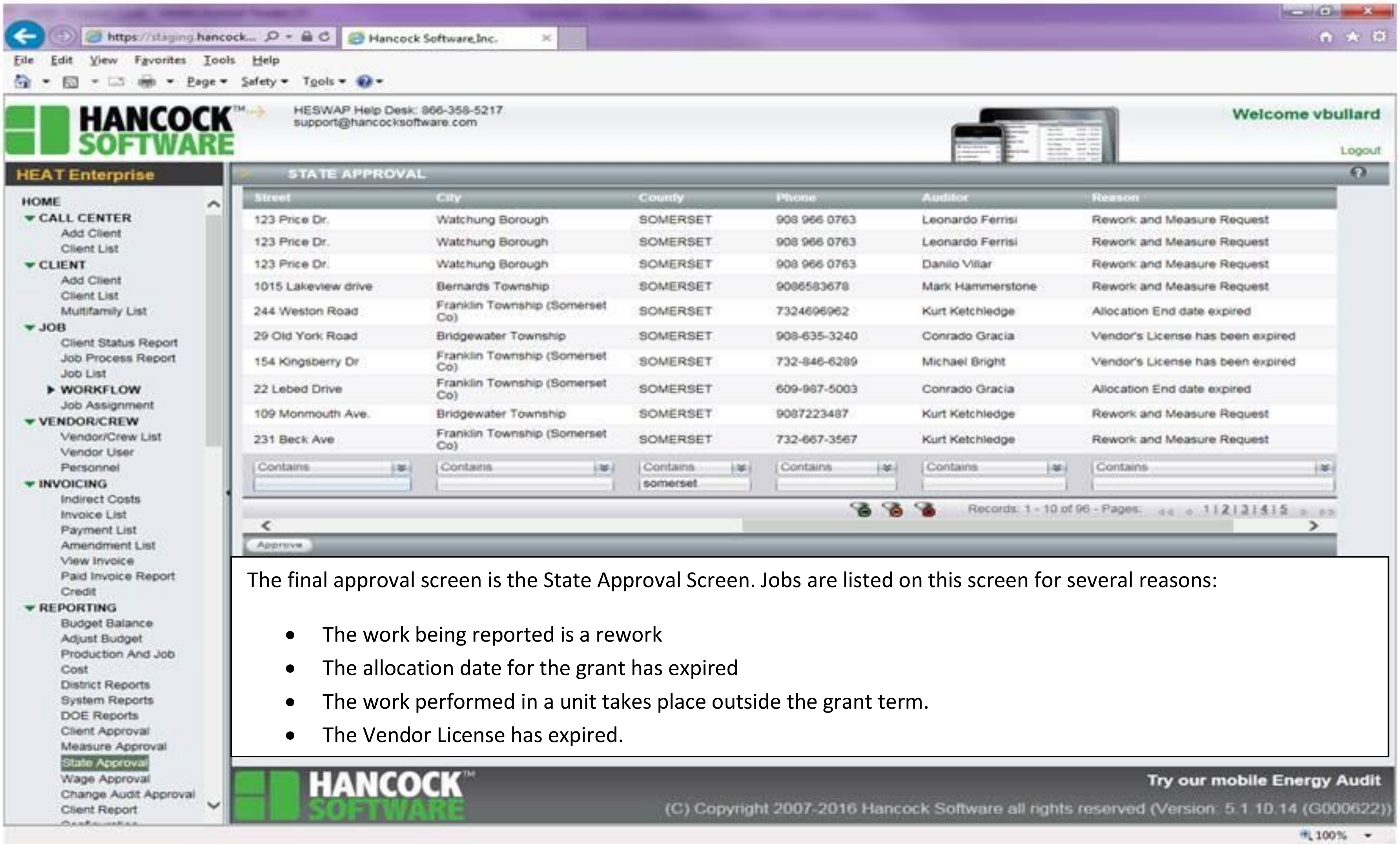
For agencies with WAP and LEAD PILOT grants, the Lead Pilot client will ALWAYS be entered separate from the client file that received WAP. This means that an e-mail will need to be sent requesting for the record to be released.

Measure Approval



Measure approval is required when a job is being reported and the total cost of the job exceeds the allowable cost per unit. If approval from OLIEC is granted to move forward, your state Monitor will need to release the job form this screen.

State Approval



The final approval screen is the State Approval Screen. Jobs are listed on this screen for several reasons:

- The work being reported is a rework
- The allocation date for the grant has expired
- The work performed in a unit takes place outside the grant term.
- The Vendor License has expired.

In the matter of a rework, approval to perform rework on a job must be granted by the State Monitor. Once approval is granted, the State Monitor can release the record from this screen.

The allocation date error appears when the work being reported is charged to a grant that is expired. When your grant is expired, work with your State Monitor to ensure the grant is eligible for an extension and the request for an extension is submitted properly.

Similar to the allocation end date, when the work performed in a unit (the completed date) falls outside the grant term, the job will be pushed to this screen. Be sure to check all dates when building a job to confirm they are accurate. The day you enter the information is the date the system uses for that activity.

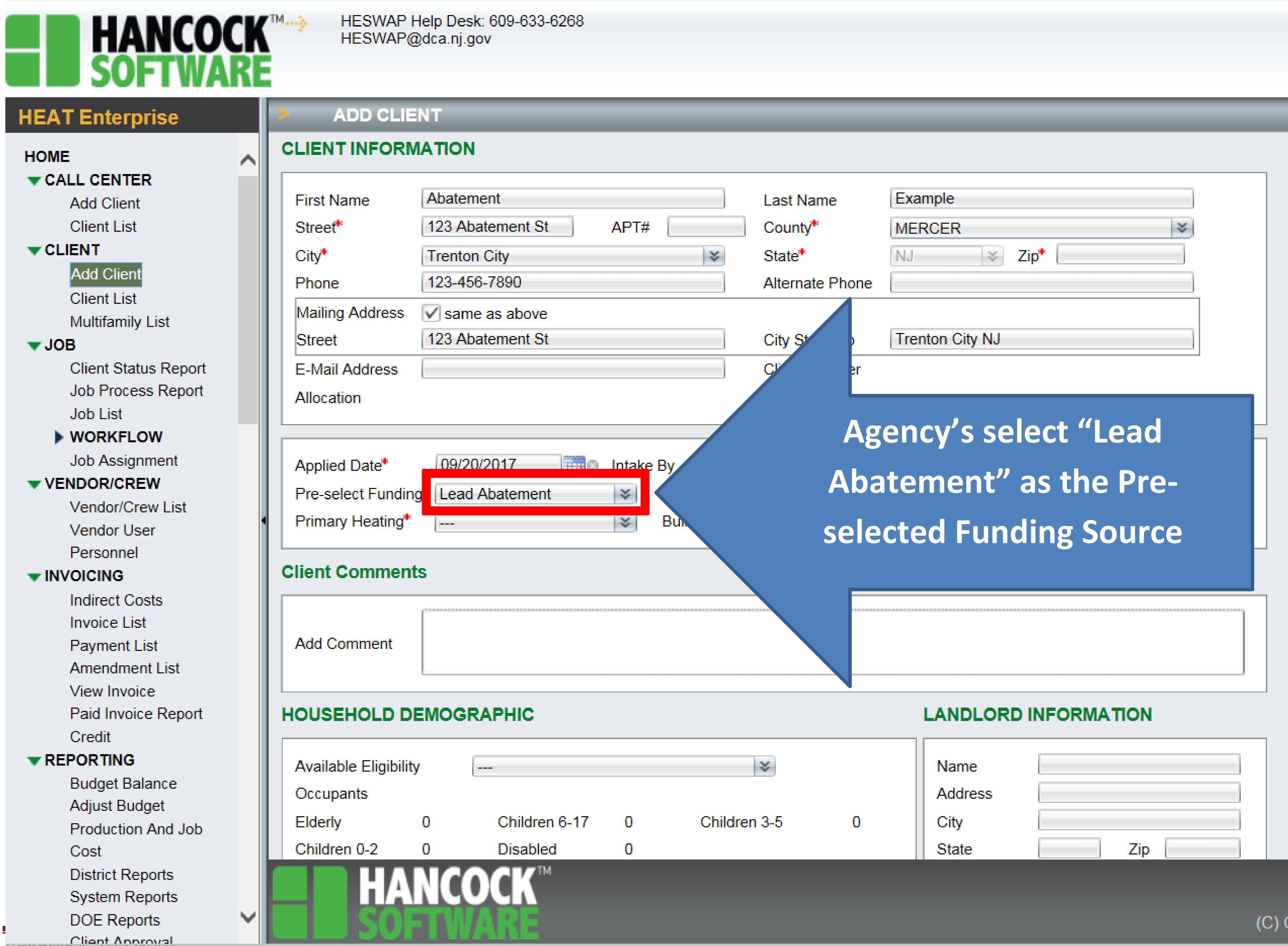
When a vendor's license expires, this will need to be updated on the vendor/crew screen and then released from the State approval screen.

Entering a Lead Abatement Client

When entering a Lead Abatement Client, the process is the same as above <u>**EXCEPT**</u> that the funding source is “Lead Abatement”.

Abatement Orders are also to be placed on an invoice <u>**separate**</u> from the lead remediation units.

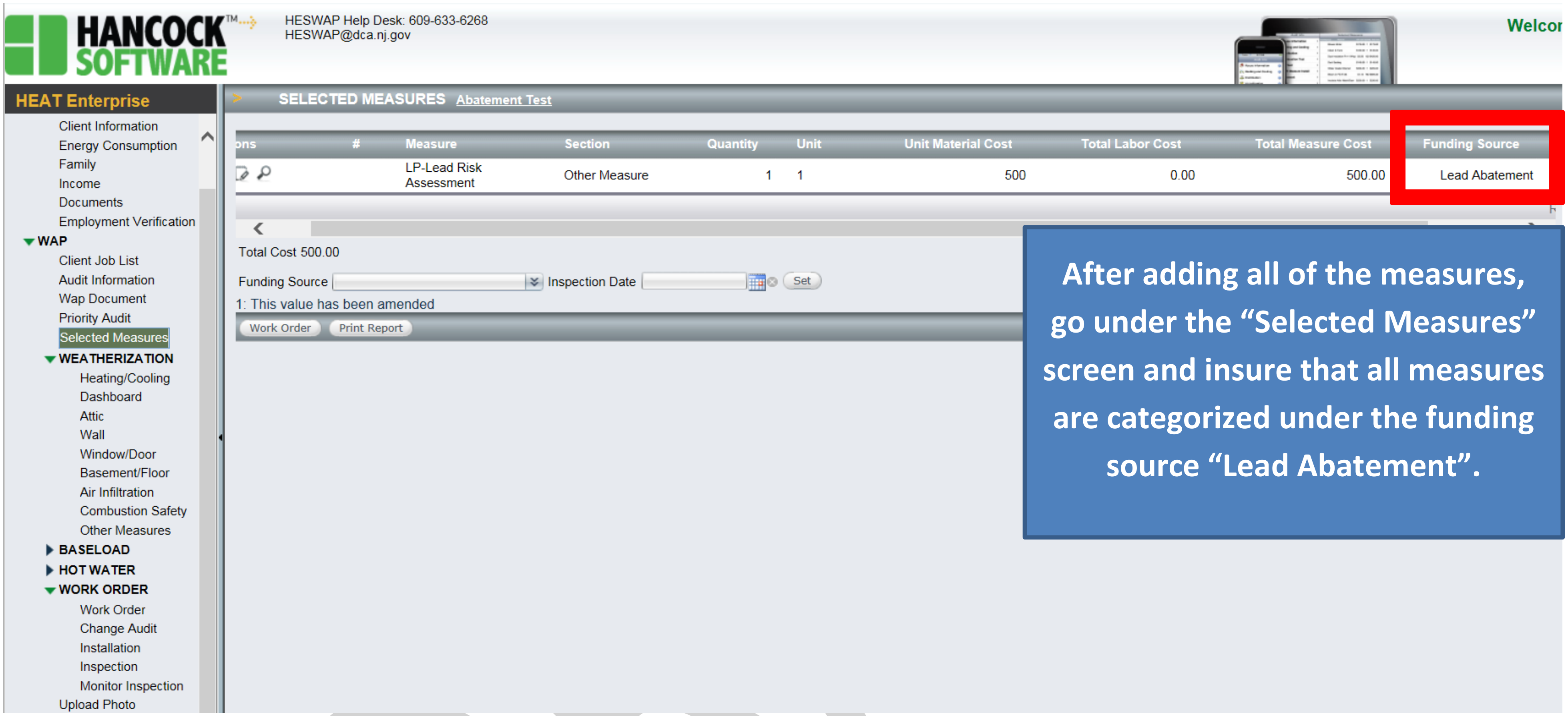
One invoice <u>**should not**</u> contain both lead remediation and lead abatement jobs.


HANCOCK SOFTWARE
HESWAP Help Desk: 609-633-6268
HESWAP@dca.nj.gov
HEAT Enterprise
ADD CLIENT
CLIENT INFORMATION
HOME
CALL CENTER
Add Client
Client List
CLIENT
Add Client
Client List
Multifamily List
JOB
Client Status Report
Job Process Report
Job List
WORKFLOW
Job Assignment
VENDOR/CREW
Vendor/Crew List
Vendor User
Personnel
INVOICING
Indirect Costs
Invoice List
Payment List
Amendment List
View Invoice
Paid Invoice Report
Credit
REPORTING
Budget Balance
Adjust Budget
Production And Job Cost
District Reports
System Reports
DOE Reports
First Name
Abatement
Last Name
Example
Street*
123 Abatement St
APT#
County*
MERCER
City*
Trenton City
State*
NJ
Zip*
Phone
123-456-7890
Alternate Phone
Mailing Address
same as above
Street
123 Abatement St
Trenton City NJ
E-Mail Address
Allocation
Applied Date*
09/20/2017
Intake By
Pre-select Funding
Lead Abatement
Primary Heating*

Agency's select "Lead Abatement" as the Pre-selected Funding Source
Client Comments
Add Comment
HOUSEHOLD DEMOGRAPHIC
Available Eligibility

Occupants
Elderly
0
Children 6-17
0
Children 3-5
0
Children 0-2
0
Disabled
0
LANDLORD INFORMATION
Name
Address
City
State
Zip

To enter measures for a Lead Abatement project, always ensure to select measures that **<u>ONLY</u>** start with “LP-“.

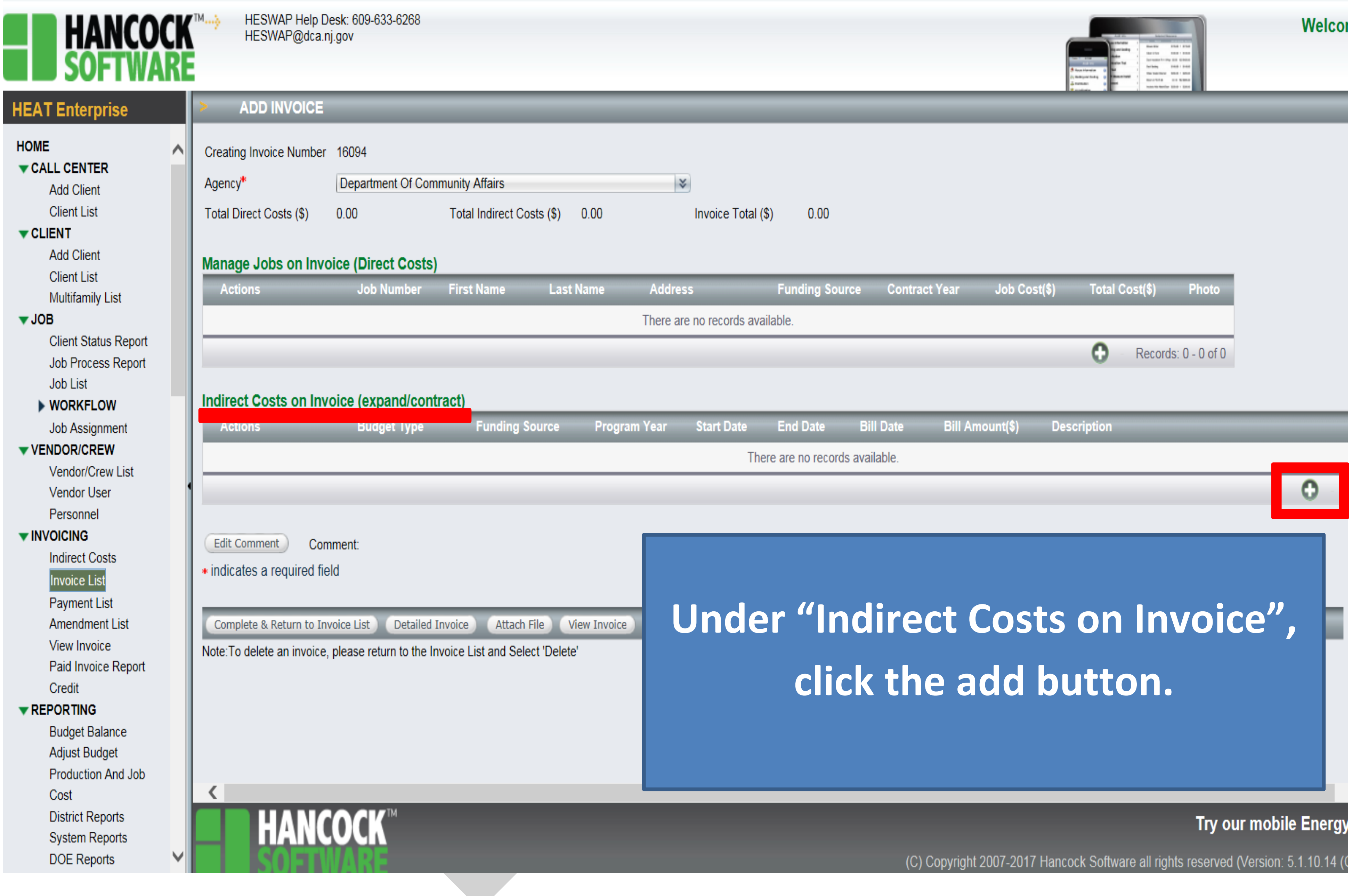

HANCOCK SOFTWARE
HESWAP Help Desk: 609-633-6268
HESWAP@dca.nj.gov
Welcor
HEAT Enterprise
SELECTED MEASURES Abatement Test
Client Information
Energy Consumption
Family
Income
Documents
Employment Verification
WAP
Client Job List
Audit Information
Wap Document
Priority Audit
Selected Measures
WEATHERIZATION
Heating/Cooling
Dashboard
Attic
Wall
Window/Door
Basement/Floor
Air Infiltration
Combustion Safety
Other Measures
BASELOAD
HOT WATER
WORK ORDER
Work Order
Change Audit
Installation
Inspection
Monitor Inspection
Upload Photo
ons # Measure Section Quantity Unit Unit Material Cost Total Labor Cost Total Measure Cost Funding Source
LP-Lead Risk Assessment Other Measure 1 1 500 0.00 500.00 Lead Abatement
Total Cost 500.00
Funding Source
Inspection Date
Set
1: This value has been amended
Work Order
Print Report
After adding all of the measures, go under the "Selected Measures" screen and insure that all measures are categorized under the funding source "Lead Abatement".

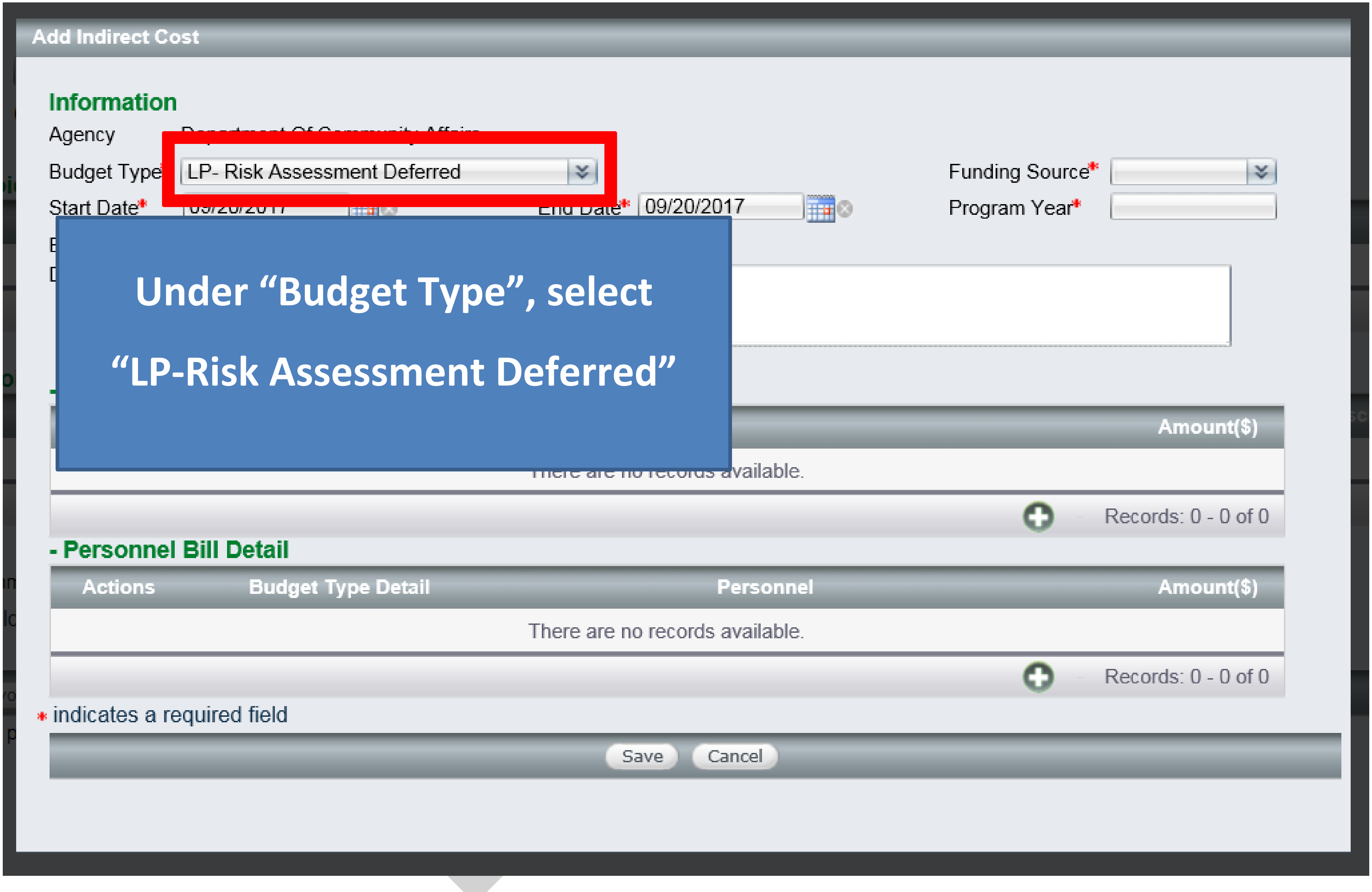
The process to finish building the client is the same as building a Lead Remediation project, as noted in the instructions above.

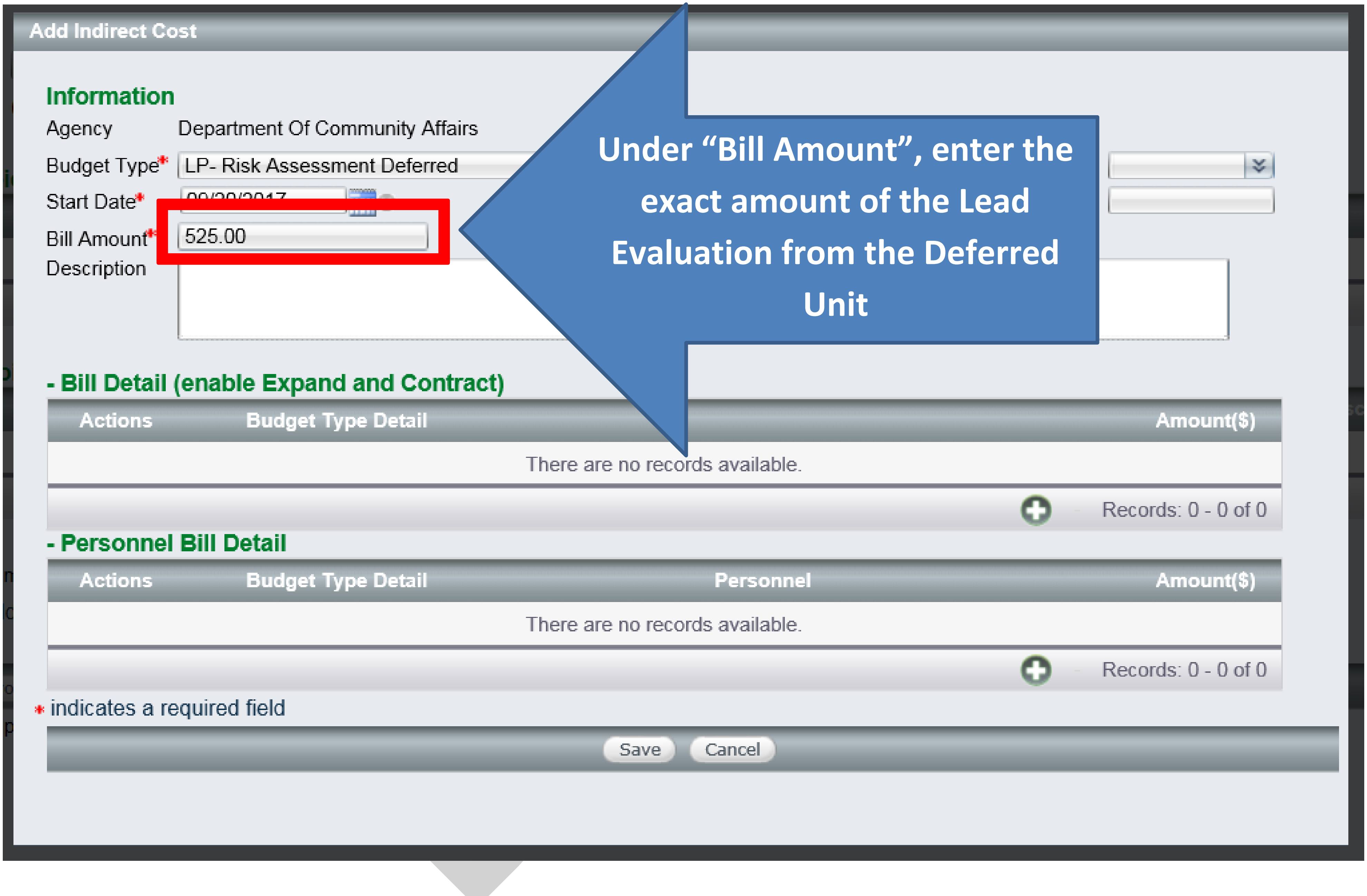
Please refer to page 17 above to finish building the client.

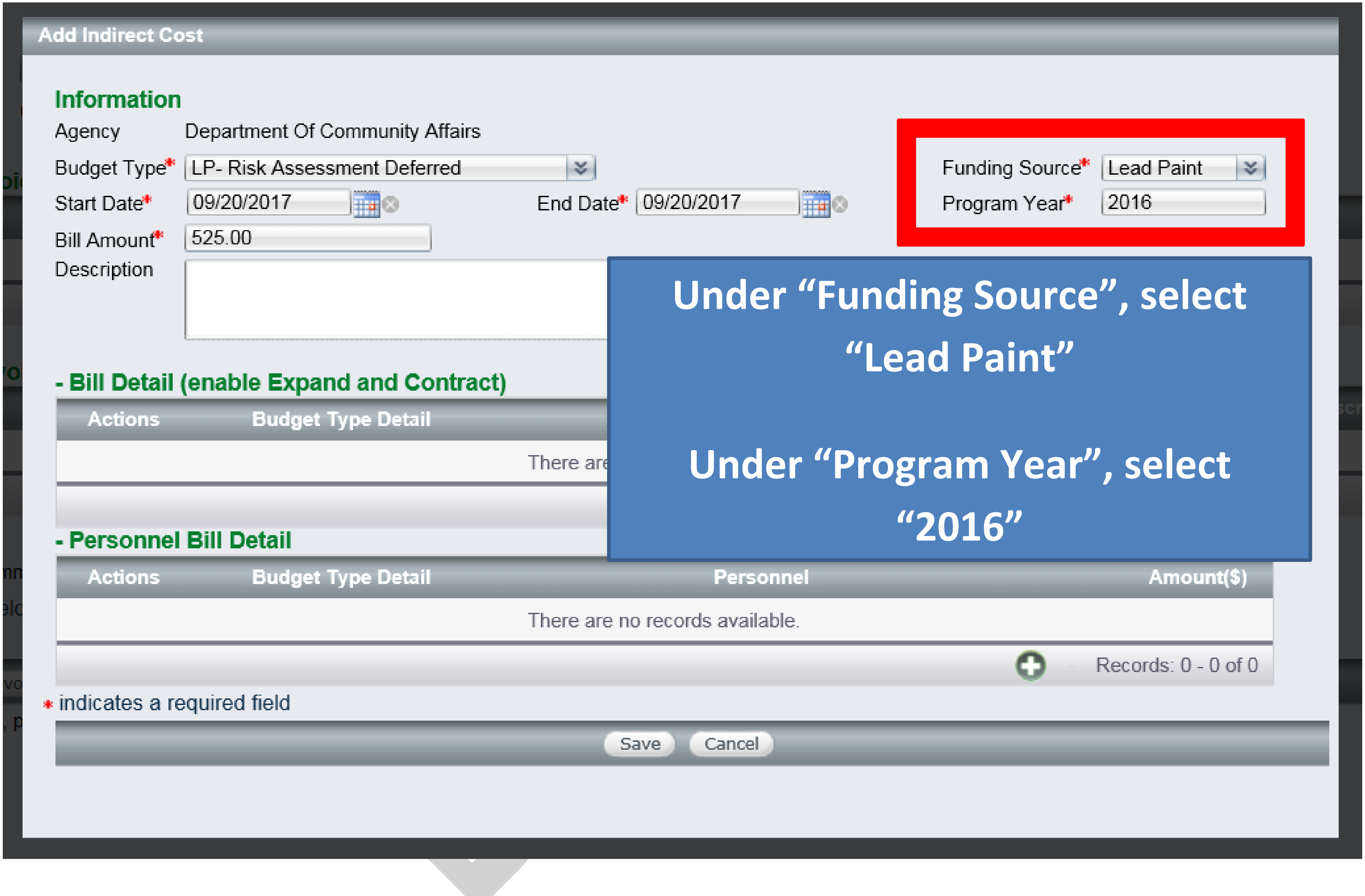
Invoicing for Lead Evaluations from Deferred Units

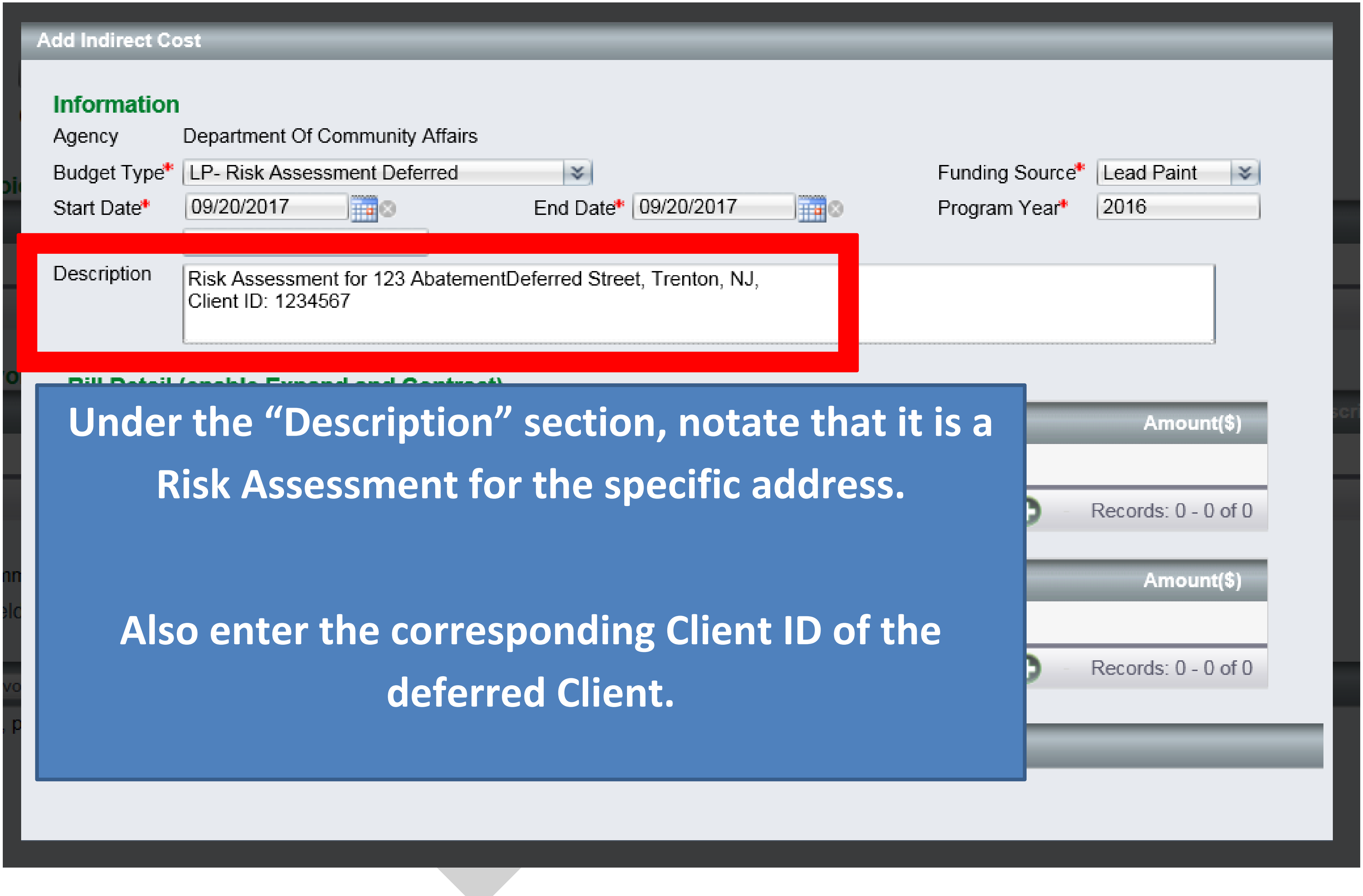
The following are instructions on how to invoice for costs **<u>incurred</u>** from lead evaluations conducted by NJDCA Certified Lead Evaluators for units that are **<u>deferred</u>**.

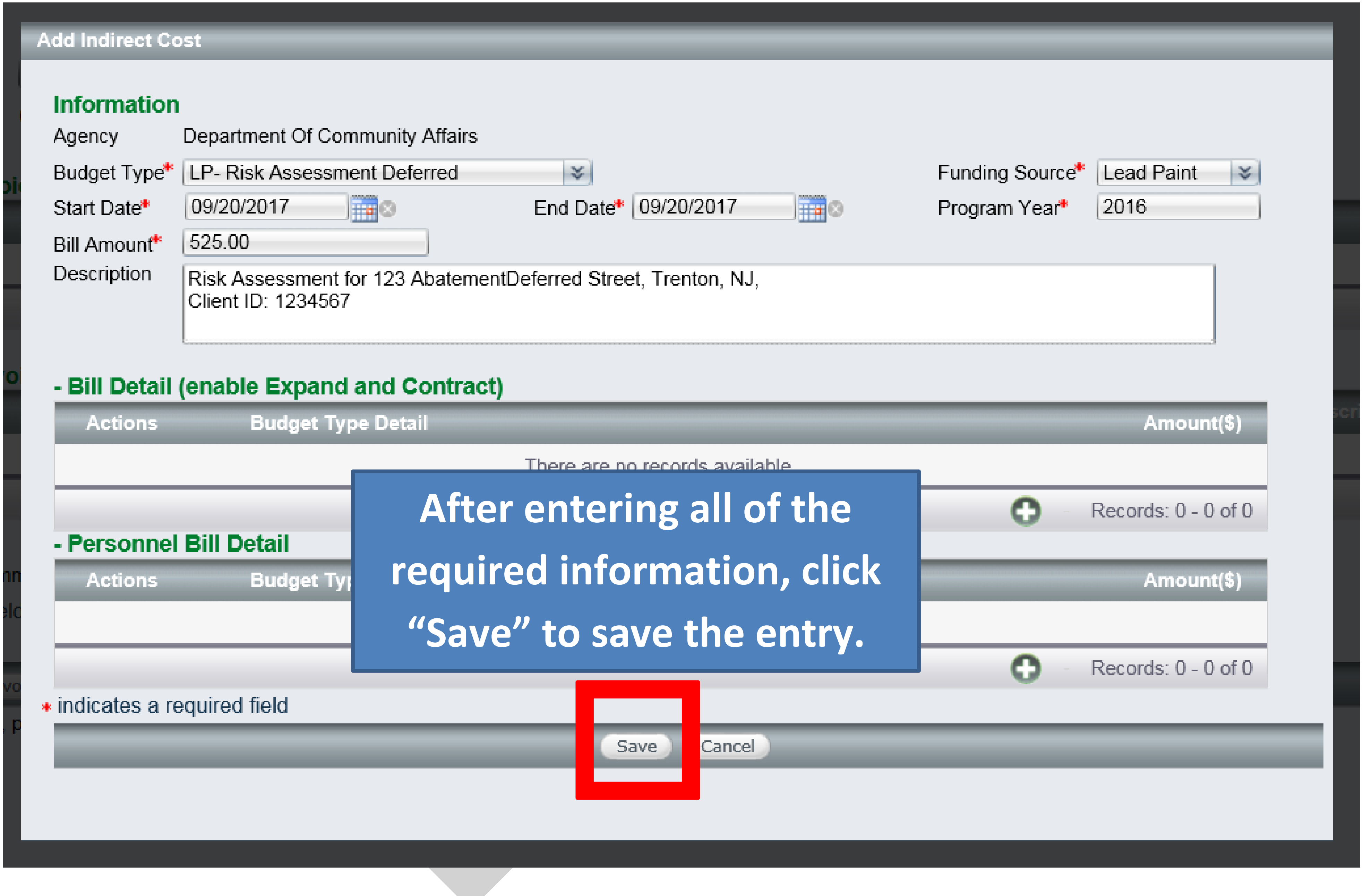

HANCOCK SOFTWARE
HESWAP Help Desk: 609-633-6268
HESWAP@dca.nj.gov
HEAT Enterprise
ADD INVOICE
HOME
CALL CENTER
Add Client
Client List
CLIENT
Add Client
Client List
Multifamily List
JOB
Client Status Report
Job Process Report
Job List
WORKFLOW
Job Assignment
VENDOR/CREW
Vendor/Crew List
Vendor User
Personnel
INVOICING
Indirect Costs
Invoice List
Payment List
Amendment List
View Invoice
Paid Invoice Report
Credit
REPORTING
Budget Balance
Adjust Budget
Production And Job Cost
District Reports
System Reports
DOE Reports
Creating Invoice Number 16094
Agency* Department Of Community Affairs
Total Direct Costs ($) 0.00
Total Indirect Costs ($) 0.00
Invoice Total ($) 0.00
Manage Jobs on Invoice (Direct Costs)
Actions
Job Number
First Name
Last Name
Address
Funding Source
Contract Year
Job Cost($)
Total Cost($)
Photo
There are no records available.
Records: 0 - 0 of 0
Indirect Costs on Invoice (expand/contract)
Actions
Budget Type
Funding Source
Program Year
Start Date
End Date
Bill Date
Bill Amount($)
Description
There are no records available.
Edit Comment
Comment:
* indicates a required field
Complete & Return to Invoice List
Detailed Invoice
Attach File
View Invoice
Note:To delete an invoice, please return to the Invoice List and Select 'Delete'
Under "Indirect Costs on Invoice", click the add button.
Try our mobile Energy
(C) Copyright 2007-2017 Hancock Software all rights reserved (Version: 5.1.10.14

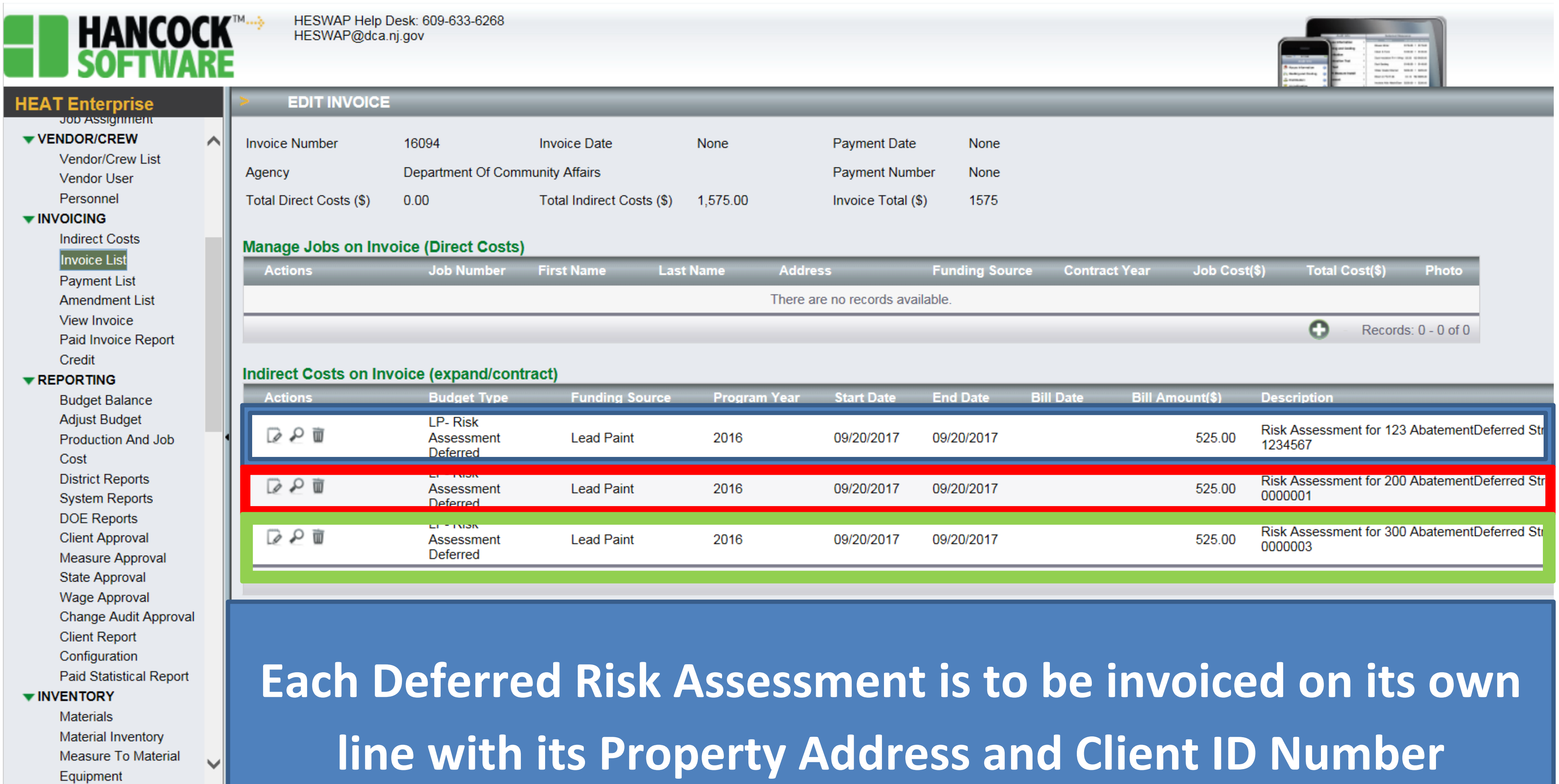

Add Indirect Cost
Information
Agency
Budget Type
LP- Risk Assessment Deferred
Funding Source*
Start Date*
End Date*
09/20/2017
Program Year*
Under "Budget Type", select
"LP-Risk Assessment Deferred"
Amount($)
There are no records available.
Records: 0 - 0 of 0
- Personnel Bill Detail
Actions
Budget Type Detail
Personnel
Amount($)
There are no records available.
Records: 0 - 0 of 0
* indicates a required field
Save
Cancel


Add Indirect Cost
Information
Agency
Department Of Community Affairs
Budget Type*
LP- Risk Assessment Deferred
Start Date*
Bill Amount*
525.00
Description
Under “Bill Amount”, enter the exact amount of the Lead Evaluation from the Deferred Unit
- Bill Detail (enable Expand and Contract)
Actions
Budget Type Detail
Amount($)
There are no records available.
Records: 0 - 0 of 0
- Personnel Bill Detail
Actions
Budget Type Detail
Personnel
Amount($)
There are no records available.
Records: 0 - 0 of 0
* indicates a required field
Save
Cancel


Add Indirect Cost
Information
Agency
Department Of Community Affairs
Budget Type*
LP- Risk Assessment Deferred
Start Date*
09/20/2017
End Date*
09/20/2017
Bill Amount*
525.00
Description
Funding Source*
Lead Paint
Program Year*
2016
Under "Funding Source", select "Lead Paint"
Under "Program Year", select "2016"
- Bill Detail (enable Expand and Contract)
Actions
Budget Type Detail
- Personnel Bill Detail
Actions
Budget Type Detail
Personnel
Amount($)
There are no records available.
Records: 0 - 0 of 0
* indicates a required field
Save
Cancel


Add Indirect Cost
Information
Agency
Department Of Community Affairs
Budget Type*
LP- Risk Assessment Deferred
Funding Source*
Lead Paint
Start Date*
09/20/2017
End Date*
09/20/2017
Program Year*
2016
Description
Risk Assessment for 123 AbatementDeferred Street, Trenton, NJ, Client ID: 1234567
Amount($)
Records: 0 - 0 of 0
Amount($)
Records: 0 - 0 of 0
Under the "Description" section, notate that it is a Risk Assessment for the specific address.
Also enter the corresponding Client ID of the deferred Client.


Add Indirect Cost
Information
Agency
Department Of Community Affairs
Budget Type*
LP- Risk Assessment Deferred
Funding Source*
Lead Paint
Start Date*
09/20/2017
End Date*
09/20/2017
Program Year*
2016
Bill Amount*
525.00
Description
Risk Assessment for 123 AbatementDeferred Street, Trenton, NJ,
Client ID: 1234567
- Bill Detail (enable Expand and Contract)
Actions
Budget Type Detail
Amount($)
There are no records available
Records: 0 - 0 of 0
- Personnel Bill Detail
Actions
Amount($)
Records: 0 - 0 of 0
* indicates a required field
Save
Cancel
After entering all of the required information, click "Save" to save the entry.



Each Deferred Risk Assessment is to be invoiced on its own line with its Property Address and Client ID Number notated in the comments/description section.

Because it is the same funding source, “lead paint”, lead evaluation deferrals can be put on the same invoice with normal and completed lead remediation jobs.

Please note that <u>*lead remediation*</u> jobs <u>**SHOULD NOT**</u> be placed on the same invoice as <u>*lead abatement*</u> jobs.