

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 performed by the agency for all active 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](mailto:LeadSafeProgram@dca.nj.gov).

# Client Intake

The screenshot shows the Hancock Software HEAT Enterprise web application. The browser address bar displays <https://staging.hancocksoftware.com/>. The page header includes the Hancock Software logo, contact information for HESWAP Help Desk (866-358-5217, support@hancocksoftware.com), and a user greeting: "Welcome vbullard" with a "Logout" link. The left navigation menu is titled "HEAT Enterprise" and includes sections for HOME, CALL CENTER, CLIENT, JOB, WORKFLOW, VENDOR/CREW, INVOICING, and REPORTING. The main content area is titled "HOME" and features a "News" section with several articles dated from May 6, 2015, to February 25, 2015. A text box at the bottom of the news section contains the following text: "When logging into Hancock Software, this page is used to communicate with users. Any guidance applicable to the system will be communicated here." The footer includes the Hancock Software logo, the text "Try our mobile Energy Audit", and copyright information: "(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))".

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

https://staging.hancock... Hancock Software, Inc.

HESWAP Help Desk: 866-358-5217 support@hancocksoftware.com

Welcome vbullard Logout

**HEAT Enterprise**

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 LIST**

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 Contains Contains Contains Contains 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.

**HANCOCK SOFTWARE** Try our mobile Energy Audit

(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

110%


HESWAP Help Desk: 866-358-5217  
support@hancocksoftware.com
Welcome vbullard
Logout

**HEAT Enterprise**

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** John Example

**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


Try our mobile Energy Audit  
 (C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

# Client Intake

Comments

- 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.

Add Comment

Eligibility Status	Eligible	Wap Rank	
Categorical Eligibility	LEAD Pilot	-1	
Occupants	4		3
Elderly	0		5 1
Children 0-2	1		

LANDLORD INFORMATION

Name: \_\_\_\_\_  
Address: \_\_\_\_\_  
City: \_\_\_\_\_  
State: \_\_\_\_\_ Zip: \_\_\_\_\_  
Phone: \_\_\_\_\_

DISTRICT INFORMATION

There is no district information.

• Indicates a required field

Save Wap Form WAP Eligible Denial Letter Print Comment

Try our mobile Energy Audit

HANCOCK SOFTWARE (C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

# Client Intake

The screenshot shows the Hancock Software HEAT Enterprise web application. The browser address bar indicates the URL is https://staging.hancock... and the page title is Hancock Software, Inc. The navigation menu on the left includes HOME, CLIENT INTAKE, WAP, WEATHERIZATION, BASELOAD, HOT WATER, WORK ORDER, and ENERGY SAVINGS. The main content area is titled 'FAMILY John Example' and contains a table with the following data:

Actions	First Name	Last Name	Date of Births	Gender	Age	Disability	Race
	John	Example	01/01/1964	Male	52	No	
	Jane	Example	02/02/1960	Female	56	No	
	Jay	Example	01/02/2016	Male	0	No	
	Kristen	Example	01/02/2013	Female	3	No	

Below the table, there is a plus sign icon and the text 'Records: 1 - 4 of 4 - Pages: 1 (out of 1)'. A text box with a black border is overlaid on the page, containing the following text:

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.

The Hancock Software logo is visible in the bottom left corner, and the footer contains the text 'Try our mobile Energy Audit' and '(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))'.

The screenshot shows a web browser window with the URL <https://staging.hancock...> and the Hancock Software, Inc. logo. The page title is "HEAT Enterprise" and the user is logged in as "vbullard". The main content area displays the "Edit Family Information" form for a client named John Example. The form fields are as follows:

Field	Value
First Name	John
Last Name	Example
Middle Name	
Date of Birth <sup>1</sup>	01/01/1964
Age <sup>1</sup>	52
Gender*	M
Disability	No
Race	
Education	
Medical Insurance	
Employment Status	
Relation	HH
Language	
Marital Status	

Demographic checkboxes:

- 0 to 2
- 3 to 5
- 6 to 17
- >=60
- Veteran
- Parenting
- Pregnant Women

\* Indicates a required field

1: Either Date of Birth or Age is required.

Buttons: Save, Cancel

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

**HANCOCK SOFTWARE**™ HESWAP Help Desk: 866-358-5217 support@hancocksoftware.com Welcome vbullard Logout

**HEAT Enterprise** INCOME John Example

Actions	Family Member	Income Type	Pay Amount (\$)	Frequency	Hours/Week	Monthly Income
	John 01/01/1964	Gross wages and salary	2,500.00	Monthly	0	2,500.00

Records: 1 -

All family member(s) 18 and older must have an income row, the family member(s) Jane need to have income listed.

Monthly Income 2,500.00  
 Annual Income 30,000.00

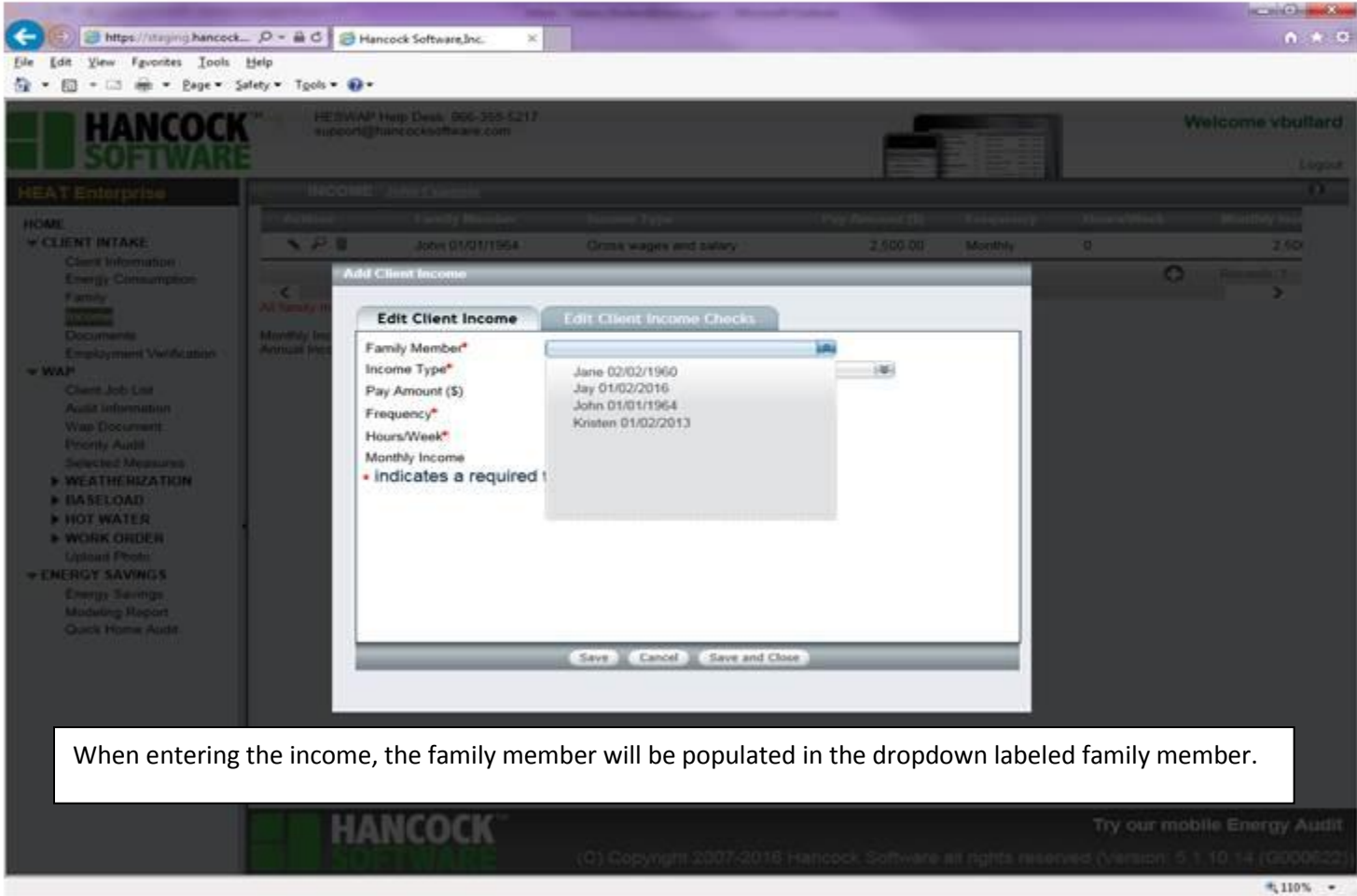
**HANCOCK SOFTWARE**™ Try our mobile Energy Audit  
 (C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

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



# Client Intake

After selecting the member of the family, the income types will be listed as well.

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 in 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 in 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".

**HANCOCK SOFTWARE** HESWAP Help Desk: 866-358-5217 support@hancocksoftware.com

Welcome vbuliard Logout

**HEAT Enterprise**

**DOCUMENTS** John Example

Actions	Document	Complete/Not Required	Received Date	Notes	Attachment File
	Signed and Completed Application	Complete	11/16/2016		
	Copy of Social Security Cards for all members of the household.	Complete	11/16/2016		
	Proof of Income	Complete	11/16/2016		
	Utility Bill & 1 Yr Client Energy Consumption Usage Data or deliverable fuel receipt	Not Required		N/A	
	Verification of Employment	Not Required		N/A	
	Tax Bill or Mortgage Statement	Not Required		N/A	
	Tax Return	Not Required		N/A	
	No Income Verification form / Written Statement	Complete	11/16/2016		
	Income Eligibility Documents and Net Rental Income Form (if applicable)	Not Required		N/A	
	Tenant Verification/Section 8/Lease	Not Required		Homeowner	
	Landlord Tenant Agreement	Not Required		N/A	
	Consumption Record	Not Required		N/A	
	Categorical Eligibility Documentation	Not Required		N/A	
	Health & Safety Client Intake Survey	Not Required		N/A	
	Owner's Permission to Weatherize	Complete	11/16/2016		

Records: 1 - 15 of 15

Note: Attachments are required for completed documents marked with a red asterisk. Use "Edit Client Document" (notepad action button) to upload attachments. If a required document does not apply to this client, please mark the document as "Not Required" and enter the reason why the document is not applicable in the Comments field.

**Update Multiple Documents**

Change Status to:

Change Received Date to:

**HANCOCK SOFTWARE** Try our mobile Energy Audit

(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

# Technical

The screenshot displays the HANCOCK SOFTWARE HEAT Enterprise web application. The browser address bar shows 'https://staging.hancock...'. The page title is 'AUDIT INFORMATION John Example'. The left sidebar contains a navigation menu with sections: HOME, CLIENT INTAKE, WAP, WEATHERIZATION, BASELOAD, HOT WATER, WORK ORDER, and ENERGY SAVINGS. The main content area is titled 'Site Assessment' and contains the following fields:

First Name	John	Last Name	Example
WAP Rank	2	Agency	Department Of Community Affairs
Job Number*	1412278138	Auditor*	Xin Li
Job Type		Job Status*	Inspected
Assessment Date	11/16/2016	Reweather. Date	
Complete Date	None		
Audit Type	Quick Audit		

Below the Site Assessment section are two other sections:

- Nearest Weather Location:** State [dropdown], Location [dropdown]
- House Information:** House Type [dropdown], DHW Heating [dropdown], Basement Type [dropdown], # of Smokers&Pets [0], # of Woodstoves [0], # of Fireplaces [0], # of Unvented Heaters [0], # of Bedrooms [0], Year Built [dropdown]. Checkboxes:  Knob&Tube,  Asbestos,  Lead Paint,  Moisture Problems,  VOC,  Built before 1979.

The footer contains the HANCOCK SOFTWARE logo, the text 'Try our mobile Energy Audit', and the copyright notice: '(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))'. The browser zoom is set to 105%.

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

HEAT Enterprise

OTHER MEASURES John Example

Actions	Measure	Unit Cost	Quantity	Unit
✖	LP-Door-strip-wet scrape	200.00	2	EA
✖	LP-Stabilize window-misc.	100.00	5	EA
✖	LP-Ext remove paint - scrapers	5.00	1,000	SF
✖	LP-Door - stabilize & paint alkyd	5.00	200	EA
✖	LP-Clean-HEAP/wet wipe/HEPA	2,000.00	1	SF
✖	LP-Stabilize and paint 4	5.00	300	SF
✖	LP- Environmental Review	200.00	1	1
✖	LP- Lead Risk Assessment	300.00	1	1

Records: 1 - 8 of 8

Print View Photo Upload Photo

Try our mobile Energy Audit

(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

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

Actions	Measure	Unit Cost	Quantity	Unit
	LP-Door-strip-wet scrape	200.00	2	EA
	LP-Stabilize window-misc.	100.00	5	EA
	LP-Ext remove paint - scrapers	5.00	1,000	SF
	LP-Door - stabilize & paint alkyl	5.00	200	EA
	LP-Clean-HEPA/wet wipe/HEPA	2,000.00	1	SF
	LP-Stabilize and paint 4	5.00	300	SF
	LP- Environmental Review	200.00	1	1
	LP- Lead Risk Assessment	300.00	1	1

Measure\*

- LP-Clean floor - HEPATSP
- LP-Clean- HEPA
- LP-Clean-HEPA/wet wipe/HEPA
- LP-Clean-HEPA/wet wipe
- LP-Commercial clean curtains
- LP-Custom sealing
- LP-Custom stairwell treatment
- LP-Daily relocation
- LP-Disose of carpet

Unit Cost\*

Total Material Cost

Comment

In the event that there is a measure needed to be added to the list, users are to e-mail [leadpilotprogram@dca.nj.gov](mailto: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.

(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))



# Technical

HEAT Enterprise

WORK ORDER John Example

Agency:

Work Order Date:

Vendor:  Search

Actions	Job Number	Work Order Date	Status	First Name	Last Name	Vendor	Total Amount(\$)	Callback
	1412278138	11/16/2016	Inspection	John	Example	ABC Lead Contractors	10,400.00	No
	1412278138	11/16/2016	Work Order	John	Example	LEW Corporation	500.00	No

Records: 1 - 2 of 2 - Pages: 1

Try our mobile Energy Audit

(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

105%

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

The screenshot shows a web browser window with the URL <https://staging.hancock...> and the Hancock Software, Inc. logo. The application interface includes a navigation menu on the left with categories like HOME, CLIENT INTAKE, WAP, WEATHERIZ, and ENERGY SAVINGS. The main content area displays a 'Work Order Details' window for Job Number 1412278138, Client Number 1412278138, and Client Name John Example. The window contains a table of measures and print options.

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:

Print Options  
 Include Costs  Photos  Sort Work Order by Prior  Include Air Infiltration ink

\* indicates a required field

Buttons: Save, Cancel, Print, Job Measure Report, E-Mail, Labor Log Report

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

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	<input type="text" value="1"/>	1	<input type="text" value="200.00"/>	<input type="text" value="0.00"/>
	LP- Lead Risk Assessment	LEW Corporation	1	1	300.00	0.00

**Update Multiple Measures**

Change Vendor to:

**Print Options**

Include Costs     Photos     Sort Work Order by Prior     Include Air Infiltration inf.

\* indicates a required field

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:

Print Options

Include Costs     Include Air Infiltration info

\* indicates a required

ABC Lead Contractors  
Leadbeater's Plumbing & Heating  
LEW Corporation  
Windows Plus

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

The screenshot shows the HANCOCK SOFTWARE HEAT Enterprise web application. The browser address bar displays "https://staging.hancock...". The page header includes the HANCOCK SOFTWARE logo, contact information for HESWAP Help Desk (866-358-5217, support@hancocksoftware.com), and a user greeting "Welcome vbullard" with a "Logout" link. The left sidebar contains a navigation menu with categories: HOME, CLIENT INTAKE, WAP, WEATHERIZATION, BASELOAD, HOT WATER, WORK ORDER, and ENERGY SAVINGS. The "INSTALLATION" screen for "John Example" is active, featuring search filters for Agency, Contact, Install Date, and Vendor, and a "Search" button. Below the filters is a table with columns: Actions, Job Number, Install Date, Status, First Name, Last Name, Total Amount(\$), and Callback. The table contains two records for Job Number 1412278138. The first record has a status of "Work Order" and a total amount of 0.00. The second record has a status of "Inspection" on 11/16/2016 and a total amount of 10,400.00. Below the table are filter options for "Contains" and "Equal To". The footer of the application includes the HANCOCK SOFTWARE logo, the text "Try our mobile Energy Audit", and copyright information: "(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))".

Actions	Job Number	Install Date	Status	First Name	Last Name	Total Amount(\$)	Callback
	1412278138		Work Order	John	Example	0.00	No
	1412278138	11/16/2016	Inspection	John	Example	10,400.00	No

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

https://staging.hancock... Hancock Software, Inc.

File Edit View Favorites Tools Help

Page Safety Tools

**HANCOCK SOFTWARE** HESWAP Help Desk: 866-358-5217 support@hancocksoftware.com

Welcome vbullard Logout

HEAT Enterprise INSTALLATION - John Example

HOME

- CLIENT INTAKE
  - Client Information
  - Energy Consumption
  - Family
  - Income
  - Documents
  - Employment Verif
- WAP
  - Client Job List
  - Audit Information
  - Wap Document
  - Priority Audit
  - Selected Measure
- WEATHERIZATION
  - Heating/Cooling
  - Dashboard
  - Attic
  - Wall
  - Window/Door
  - Basement/Flo
  - Air Infiltration
  - Combustion S
  - Other Measure
- BASELOAD
- HOT WATER
- WORK ORDER
  - Work Order
  - Change Audit
  - Inspection
  - Monitor Inspection
  - Upload Photo
- ENERGY SAVINGS
  - Energy Savings
  - Modeling Report
  - Quick Home Audit

Agency [---]

Installation Details

Information Measures

Job Number	1412278138	Client Number	1412278138	Client Name	John Example	Callback	<input type="checkbox"/>
Vendor	LEW Corporation						
Agency	Department Of Community Affairs						
Work Order Date	11/16/2016						
Comment	<input type="text"/>						
Inspection Date	<input type="text"/>						

• indicates a required field

Save Cancel Save and Close View Photo Upload Photo

**HANCOCK SOFTWARE** Try our mobile Energy Audit

(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (C000822))

105%

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

Installation Details

**Information** Measures

Job Number	1412278138	Client Number	1412278138	Client Name	John Example	Callback	<input type="checkbox"/>
Vendor	LEW Corporation						
Agency	Department Of Community Affairs						
Work Order Date	11/15/2016						
Comment	<input type="text"/>						
Inspection Date*	11/15/2016						

\* indicates a required field

Save Cancel Save and Close View Photo Upload Photo

Although the field for date is labeled "inspection date", this serves as your installation date.



# Technical

The screenshot displays the HANCOCK SOFTWARE HEAT Enterprise web application interface. The browser address bar shows the URL <https://staging.hancock...>. The page header includes the HANCOCK SOFTWARE logo, contact information (HESWAP Help Desk: 866-358-5217, support@hancocksoftware.com), and a user greeting (Welcome vbullard) with a Logout link. The left sidebar contains a navigation menu with categories: HOME, CLIENT INTAKE, WAP, WEATHERIZATION, BASELOAD, HOT WATER, WORK ORDER, and ENERGY SAVINGS. The main content area is titled "INSTALLATION John Example" and features a search form with fields for Agency, Contact, Install Date, and Vendor. Below the search form is a table with the following data:

Actions	Job Number	Install Date	Status	First Name	Last Name	Total Amount(\$)	Callback
	1412278138	11/16/2016	Inspection	John	Example	10,400.00	No
	1412278138	11/15/2016	Install	John	Example	500.00	No

Below the table are search filters for "Contains", "Equal To", and "Equal To". The footer of the application includes the HANCOCK SOFTWARE logo, the text "Try our mobile Energy Audit", and the copyright notice: "(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))".

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

# Technical

The screenshot displays the HANCOCK SOFTWARE HEAT Enterprise web application. The interface includes a navigation menu on the left with categories like CLIENT INTAKE, WAP, WEATHERIZATION, BASELOAD, HOT WATER, WORK ORDER, and ENERGY SAVINGS. The main content area shows an 'INSPECTION' screen for 'John Example' with search filters for Agency, Inspector, and Inspection Date. A table lists inspection records for job number 1412278138, showing an 'Install' status and a subsequent 'Inspection' status on 11/16/2016. A text box notes: 'The work has been installed and now the final inspection needs to be performed. The inspection screen is your next step.'

Actions	Job Number	Inspection Date	Status	First Name	Last Name	Total Amount(\$)	Failed	Call
	1412278138		Install	John	Example	0.00	No	No
	1412278138	11/16/2016	Inspection	John	Example	10,400.00	No	No

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

The screenshot shows a web browser window with the URL <https://staging.hancock...> and the Hancock Software, Inc. logo. The page header includes the Hancock Software logo, contact information (HESWAP Help Desk: 866-358-5217, support@hancocksoftware.com), and a user greeting (Welcome vbullard). The main content area displays an 'Inspection Detail' form with the following fields:

Inspection Detail		Measure	
Job Number	1412278138	Client Number	1412278138
Vendor	LEW Corporation	Client Name	John Example
Agency	Department Of Community Affairs	Work Order Date	11/15/2016
Schedule Inspector*	<input type="text"/>	Install Date	11/15/2016
Comment	<input type="text"/>	Date	<input type="text"/>

\* indicates a required field

At the bottom of the form, there are buttons for 'Save', 'Cancel', 'Save and Close', 'Agency QC Form', and 'Entire Job Agency QC Form'. A callout box with a black border and white background contains the text: '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.'

**Inspection Detail**

Job Number	1412278138	Client Number	1412278138	Client Name	John Example	Callback	<input type="checkbox"/>
Vendor	LEW Corporation	Work Order Date	11/15/2016	Install Date	11/15/2016		
Agency	Department Of Community Affairs	Date	11/15/2016				
Schedule Inspector*	Xin Li						
Comment	Work completed						

\* indicates a required field

Buttons: Save, Cancel, Save and Close, Agency\_QC Form, Entire Job Agency\_QC Form

### Print Options for Final Acceptance Form

Include Costs       Entire Job

Save    Cancel    Save and Close    Agency QC Form    Entire Job Agency QC Form

**HANCOCK SOFTWARE**  
 HESWAP Help Desk: 866-358-5217  
 support@hancocksoftware.com

Welcome vbullard  
 Logout

**HEAT Enterprise**    INSPECTION John Example

**Inspection Detail**

Inspection Detail    **Measure**

Record Status of All Measures

Actions	Measure	Install Quantity	Install Unit Cost	Install Labor Cost	Install Total Cost	Inspection Quantity	Inspection Unit Cost	Ins Cg
	LP- Environmental Review	1	200	0	200.00	1	200	No
	LP- Lead Risk Assessment	1	300	0	300.00	1	300	No

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

**HANCOCK SOFTWARE**    Try our mobile Energy Audit

(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

105%

The screenshot shows a web browser window with the URL <https://staging.hancock...> and the Hancock Software, Inc. logo. The application interface includes a navigation menu on the left with categories like 'CLIENT INTAKE', 'WAP', 'WEATHERIZATION', 'BASELOAD', 'HOT WATER', 'WORK ORDER', and 'ENERGY SAVINGS'. The main content area displays an 'Inspection Detail' window with a 'Measure' tab. At the top of this window is a dropdown menu labeled 'Record Status of All Measures' with a 'set' button. Below this is a table with the following data:

Item	Install Labor Cost	Install Total Cost	Inspection Quantity	Inspection Unit Cost	Inspection Labor Cost	Inspection Total Cost	Status	Comment
100	0	200.00	1	200.00	0.00	200.00	Fail/Pass	
100	0	300.00	1	300	0.00	300.00		

A dropdown menu is open over the 'Status' column of the first row, showing 'Fail' and 'Pass' options. Below the table is a scroll bar and a legend: '+ indicates a required field' and '1: This value has been amended'. A 'Cancel' button is at the bottom of the window. The footer of the application includes the Hancock Software logo, copyright information '(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))', and a 'Try our mobile Energy Audit' link. The browser's zoom level is set to 105%.

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

The screenshot displays the Hancock Software web application interface. The browser address bar shows the URL <https://staging.hancock...>. The page header includes the Hancock Software logo, contact information (HESWAP Help Desk: 866-358-5217, support@hancocksoftware.com), and a user greeting (Welcome vbullard) with a Logout link. The main content area is titled "CLIENT JOB LIST - John Example" and features a table with the following data:

Job Number	Status	First Name	Last Name	Street	City	County
1412278138	Inspected	John	Example	123 Example St	Trenton City	MERCER

Below the table, there is a pagination control showing "Records: 1 - 1 of 1 - Pages: 1" and an "Add Job" button. A text box is overlaid on the screen with the following text:

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

The footer of the application includes the Hancock Software logo, copyright information (© Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))), and a link to "Try our mobile Energy Audit".

# Fiscal

**HANCOCK SOFTWARE** HESWAP Help Desk: 866-358-5217 support@hancocksoftware.com

Welcome vbullard Logout

**HEAT Enterprise**

**INVOICE LIST**

Job Number: [ ] Agency: Department Of Community Affairs [ Search ]

First Name: [ ] Invoice Number: [ ] Invoice Date: [ ] [ ]

Last Name: [ ] Payment Number: [ ] Payment Date: [ ] [ ]

Funding Source: [ ]

Select All

<input type="checkbox"/>	Actions	Invoice Number	Status	Agency	Direct Cost (\$)	Indirect Cost (\$)	Total Cost(\$)
<input type="checkbox"/>	[ ] [ ] [ ]	14350	Open	Department Of Community Affairs	6,900.00	0.00	6,900.00
<input type="checkbox"/>	[ ] [ ] [ ]	14342	Open	Department Of Community Affairs	28,952.63	0.00	28,952.63
<input type="checkbox"/>	[ ] [ ] [ ]	09238	Submitted	Department Of Community Affairs	0.00	20,000.00	20,000.00

1: This value has been amended

Invoice Date\* | 11/16/2016 [ ] [ ]

**Print Options**

Show Unselected Invoice Numbers

\* Indicates a required field

[ Submit ] [ Detailed Invoice ] [ View Invoice ]

**HANCOCK SOFTWARE** Try our mobile Energy Audit

(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

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

**HANCOCK SOFTWARE** HESWAP Help Desk: 866-358-5217 support@hancocksoftware.com

Welcome vbullard Logout

### HEAT Enterprise

- 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
  - State Approval
  - Wage Approval
  - Change Audit Approval
  - Client Report

### EDIT INVOICE

Invoice Number	14350	Invoice Date	None	Payment Date	None
Agency	Department Of Community Affairs			Payment Number	None
Total Direct Costs (\$)	6,900.00	Total Indirect Costs (\$)	0.00	Invoice Total (\$)	6,900.00

#### Manage Jobs on Invoice (Direct Costs)

Actions	Job Number	First Name	Last Name	Address	Funding Source	Contract Year	Job Cost(\$)	Total Cost(\$)
	83122843	Timothy	Sample	1 Sample Ct	Lead Paint	2016	6,900.00	6,900.00

Record

#### 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'

**HANCOCK SOFTWARE** Try our mobile Energy Audit

(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

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

HEAT Enterprise

HEATSWAP Help Desk: 866-356-6217  
support@hancocksoftware.com

Welcome vbullard

Logout

HEAT Enterprise

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
- VENDORCREW
  - Vendor/Crew List
  - Vendor User
  - Personnel
- INVOICING
  - Indirect Costs
  - Payment List
  - Amendment List
  - View Invoice
  - Paid Invoice Report
  - Credit
- REPORTING
  - Budget Balance
  - Actual Budget
  - Production And Job Cost
  - District Reports
  - System Reports
  - OGE Reports
  - Client Approval
  - Measure Approval
  - State Approval
  - Wage Approval
  - Change Audit Approval
  - Client Report

Add Jobs

End Date\* 11/16/2016 Job Number Funding Source Lead Paint

First Name Last Name Street

Contract Year\* 2016 Search

\* indicates a required field

Agency Department Of Community Affairs

Select All

<input checked="" type="checkbox"/>	Active	Job Number	First Name	Last Name	Address	Job Cost	Total Cost
There are no records available.							

Records: 0 - 0 of 0 - Pages: 1 (out of 0)

Save Cancel View Incomplete Jobs

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

Try our mobile Energy Audit

(C) Copyright 2007-2016 Hancock Software, all rights reserved (Version: 5.1.10.14 (20160222))

100%

# Fiscal

HEAT Enterprise

End Date\* 11/16/2016 Job Number Funding Source Lead Paint

First Name Last Name Street

Contract Year\* 2016

Search

\* indicates a required field

Agency Department Of Community Affairs

Select All

	ACTC	Job Number	First Name	Last Name	Address	Job Cost	Total Cost
<input type="checkbox"/>		1412278138	John	Example	123 Example St	10,900.00	10,900.00

Records: 1 - 1 of 1 - Pages: 1 (out of 1)

Save Cancel View Incomplete Jobs

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

**HANCOCK SOFTWARE** HESWAP Help Desk: 866-358-5217 support@hancocksoftware.com Welcome vbullard Logout

**HEAT Enterprise**

**EDIT INVOICE**

Invoice Number: 14350 Invoice Date: None Payment Date: None  
Agency: Department Of Community Affairs Payment Number: None  
Total Direct Costs (\$): 17,800.00 Total Indirect Costs (\$): 0.00 Invoice Total (\$): 17800

**Manage Jobs on Invoice (Direct Costs)**

Actions	Job Number	First Name	Last Name	Address	Funding Source	Contract Year	Job Cost(\$)	Total Cost(\$)
	1412278138	John	Example	123 Example St	Lead Paint	2016	10,900.00	10,900.00
	83122843	Timothy	Sample	1 Sample Ct	Lead Paint	2016	6,900.00	6,900.00

**Indirect Costs on Invoice (expand/contract)**

Actions	Budget Type	Funding Source	Program Year	Start Date	End Date	Rate	Bill Amount(\$)	Description
There are no records available.								

• 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'

**HANCOCK SOFTWARE** Try our mobile Energy Audit (C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622)) 100%

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

The screenshot displays the Hancock Software HEAT Enterprise web application. The main content area is the 'Add Indirect Cost' form. The form has the following fields and sections:

- Information:**
  - Agency: Department Of Community Affairs
  - Budget Type\*: [Dropdown menu open with options: Admin, Financial Audit, Health and Safety Deferred, Liability Insurance, Program Support, T/TA]
  - Start Date\*: 11/16/2016
  - Bill Amount\*: [Empty field]
  - Description: [Empty text area]
  - Funding Source\*: [Empty dropdown]
  - Program Year\*: [Empty dropdown]
- Bill Detail:** A table with columns 'Actions', 'Budget Type Detail', and 'Amount(\$)'. It contains the text 'There are no records available.' and a '+ Records: 0 - 0 of 0' indicator.
- Personnel Bill Detail:** A table with columns 'Actions', 'Budget Type Detail', 'Personnel', and 'Amount(\$)'. It also contains 'There are no records available.' and a '+ Records: 0 - 0 of 0' indicator.

Red asterisks (\*) are placed next to the Budget Type, Start Date, Bill Amount, Funding Source, and Program Year fields to indicate they are required. A legend at the bottom of the form states: '\* indicates a required field'. The form has 'Save' and 'Cancel' buttons at the bottom.

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

# Fiscal

HEAT Enterprise

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
  - 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
  - State Approval
  - Wage Approval
  - Change Audit Approval
  - Client Report

Agency: Department Of Community Affairs

Budget Type: Admin

Start Date: 11/16/2016

End Date: 11/16/2016

Bill Amount: 0.00

Description:

**- Bill Detail (enable Expand and Contract)**

Actions	Budget Type Detail	Amount(\$)
There are no records available.		

**- Personnel Bill Detail**

Actions	Personnel Bill Detail	Amount(\$)
	Non-Personnel Advertising	Records: 0 - 0 of 0
	Non-Personnel Bookkeeping Services	
	Non-Personnel Lease Purchase Equipment	
	Non-Personnel Office Expense	
	Non-Personnel Other	
	Non-Personnel Travel	Records: 0 - 0 of 0

+ indicates a required field

Cancel

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

**HANCOCK SOFTWARE** HESWAP Help Desk: 866-358-5217 support@hancocksoftware.com Welcome vbullard Logout

**HEAT Enterprise**

**EDIT INVOICE**

Invoice Number: 14350 Invoice Date: None Payment Date: None  
Agency: Department Of Community Affairs Payment Number: None  
Total Direct Costs (\$): 17,800.00 Total Indirect Costs (\$): 6,200.00 Invoice Total (\$): 24000

**Manage Jobs on Invoice (Direct Costs)**

Actions	Job Number	First Name	Last Name	Address	Funding Source	Contract Year	Job Cost(\$)	Total Cost(\$)
	1412278138	John	Example	123 Example St	Lead Paint	2016	10,900.00	10,900.00
	83122843	Timothy	Sample	1 Sample Ct	Lead Paint	2016	6,900.00	6,900.00

**Indirect Costs on Invoice (expand/contract)**

Actions	Budget Type	Funding Source	Program Year	Start Date	End Date	Bill Date	Bill Amount(\$)	Description
	Program Support	Lead Paint	2016	11/16/2016	11/16/2016		6,200.00	

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'

**HANCOCK SOFTWARE** Try our mobile Energy Audit  
(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

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

Provider: Department Of Community Affairs

Address: 101 S. Broad Street

Phone: 609-633-6280

Contract No: XXXX

Trenton NJ 08625

Contact Person: Angie Armand

Report Date: 11/16/2016

State: NJ

Fax: 609-292-9798

Grant: Lead Paint

Zip: 08625

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
<b>Total</b>	<b>\$525,000.00</b>	<b>\$0.00</b>	<b>\$24,000.00</b>	<b>\$501,000.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$0.00</b>	<b>\$501,000.00</b>	<b>\$24,000.00</b>	<b>\$501,000.00</b>	<b>\$24,000.00</b>

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

**HANCOCK SOFTWARE** HESWAP Help Desk: 866-358-5217 support@hancocksoftware.com

Welcome vbullard Logout

### HEAT Enterprise

- 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
  - State Approval
  - Wage Approval
  - Change Audit Approval
  - Client Report
  - Configuration

### CLIENT STATUS REPORT

Agency: Department Of Community Affairs  
County:  Funding Source: Lead Paint  
Program Year:  Target Date: 11/16/2016

Agency	Clients Entered (Eligible/Ineligible/Incomplete/MF Ineligible)	Jobs Entered (Active / Deferred)	Scheduled	Audited	Work Ordered	Measures Installed
DCA	2(2/0/0/0)	2(2/0)	0	0	0	
Total	2(2/0/0/0)	2(2/0)	0	0	0	

Selecting a Program Year limits the results to include only invoiced jobs. If you want to include jobs that are still in process clear the Program Year field

Print





**HANCOCK SOFTWARE** Try our mobile Energy Audit

(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

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:      Target Date: 11/16/2016  
County:      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

**HANCOCK SOFTWARE** HESWAP Help Desk: 866-358-5217 support@hancocksoftware.com Welcome vbullard Logout

**HEAT Enterprise**

**BUDGET BALANCE**

Agency: Department Of Community Affairs  
Funding Source: Contract Year: Search

Agency	Funding Source	Contract Year	Contract Number	Admin Budget	Admin Balance	T/TA Budget	T/TA Balance
DCA	DOE	2008		100,000.00	80,000.00	50,000.00	50,000.00
DCA	DOE 2015	2015		20,000.00	20,000.00	5,000.00	5,000.00
DCA	Lead Paint	2016		20,000.00	20,000.00	5,000.00	5,000.00
DCA	LIHEAP 2015	2015		250,000.00	250,000.00	0.00	0.00
Total				390,000.00	370,000.00	60,000.00	60,000.00

Export to Excel group by Agency Export to Excel group by Funding Source

**HANCOCK SOFTWARE** Try our mobile Energy Audit  
(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622)) 100%

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 screenshot shows the HANCOCK SOFTWARE HEAT Enterprise web application. The main content area is titled "PRODUCTION AND JOB COST". It features a search form with the following fields: Agency (Department Of Community Affairs), County, Funding Source, Program Year, Date Range, and Show By (Agency). A "Search" button is located to the right of the form. Below the search form is a table with the following data:

Agency	Weatherization Materials	Program Support	Average Cost (DOE)	Admin	T/TA	Health & Safety
Department Of Community Affairs	17,800.00	6,200.00	12,000.00	20,000.00	0.00	0.0

Below the table, there is a note: "Note: When viewing by county, costs that are not directly linked to a county will not be included in the report." and an "Export to Excel" button.

The left sidebar contains a navigation menu with the following categories: HOME, CALL CENTER, CLIENT, JOB, WORKFLOW, VENDOR/CREW, INVOICING, and REPORTING. The "Production And Job Cost" option is highlighted under the REPORTING category.

The bottom of the screen displays the HANCOCK SOFTWARE logo, the text "Try our mobile Energy Audit", and the copyright notice: "(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))".

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

HEAT Enterprise

HANCOCK SOFTWARE

HESWAP Help Desk: 866-358-5217  
support@hancocksoftware.com

Welcome vbullard

Logout

### MEASURE APPROVAL

Jobs on this screen have exceeded the funding source cost limit, approving a job will allow it to continue and exceed the cost limit.

Actions	Job Number	First Name	Last Name	Street	City	County	Phone	Auditor
	15547	Ann	Example	101 Sunflower place	Newark	ESSEX	862-576-7776	David Padilla
	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>	<input type="text" value="Contains"/>

Records: 1 - 1 of 1 - Pages: 1

Approve

HANCOCK SOFTWARE

Try our mobile Energy Audit

(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

100%

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

HEAT Enterprise

STATE APPROVAL

Street	City	County	Phone	Auditor	Reason
123 Price Dr.	Watchung Borough	SOMERSET	908 966 0763	Leonardo Ferrisi	Rework and Measure Request
123 Price Dr.	Watchung Borough	SOMERSET	908 966 0763	Leonardo Ferrisi	Rework and Measure Request
123 Price Dr.	Watchung Borough	SOMERSET	908 966 0763	Danilo Villar	Rework and Measure Request
1015 Lakeview drive	Bernards Township	SOMERSET	9086583678	Mark Hammerstone	Rework and Measure Request
244 Weston Road	Franklin Township (Somerset Co)	SOMERSET	7324696962	Kurt Ketchledge	Allocation End date expired
29 Old York Road	Bridgewater Township	SOMERSET	908-635-3240	Conrado Gracia	Vendor's License has been expired
154 Kingsberry Dr	Franklin Township (Somerset Co)	SOMERSET	732-846-6289	Michael Bright	Vendor's License has been expired
22 Lebed Drive	Franklin Township (Somerset Co)	SOMERSET	609-987-5003	Conrado Gracia	Allocation End date expired
109 Monmouth Ave.	Bridgewater Township	SOMERSET	9087223487	Kurt Ketchledge	Rework and Measure Request
231 Beck Ave	Franklin Township (Somerset Co)	SOMERSET	732-667-3567	Kurt Ketchledge	Rework and Measure Request

Records: 1 - 10 of 96 - Pages: 1 | 2 | 3 | 4 | 5

Approve

HANCOCK SOFTWARE

Try our mobile Energy Audit

(C) Copyright 2007-2016 Hancock Software all rights reserved (Version: 5.1.10.14 (G000622))

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 **EXCEPT** that the funding source is “Lead Abatement”.

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

One invoice **should not** contain both lead remediation and lead abatement jobs.

### HEAT Enterprise

#### 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

### ADD CLIENT

#### CLIENT INFORMATION

First Name	<input type="text" value="Abatement"/>	Last Name	<input type="text" value="Example"/>
Street*	<input type="text" value="123 Abatement St"/>	APT#	<input type="text"/>
City*	<input type="text" value="Trenton City"/>	County*	<input type="text" value="MERCER"/>
Phone	<input type="text" value="123-456-7890"/>	State*	<input type="text" value="NJ"/>
		Zip*	<input type="text"/>
Alternate Phone	<input type="text"/>		

Mailing Address	<input checked="" type="checkbox"/> same as above		
Street	<input type="text" value="123 Abatement St"/>	City State	<input type="text" value="Trenton City NJ"/>
E-Mail Address	<input type="text"/>		
Allocation	<input type="text"/>		

Applied Date*	<input type="text" value="09/20/2017"/>	Intake By	<input type="text"/>
Pre-select Funding	<input type="text" value="Lead Abatement"/>		
Primary Heating*	<input type="text" value="---"/>	Bu	<input type="text"/>

#### Client Comments

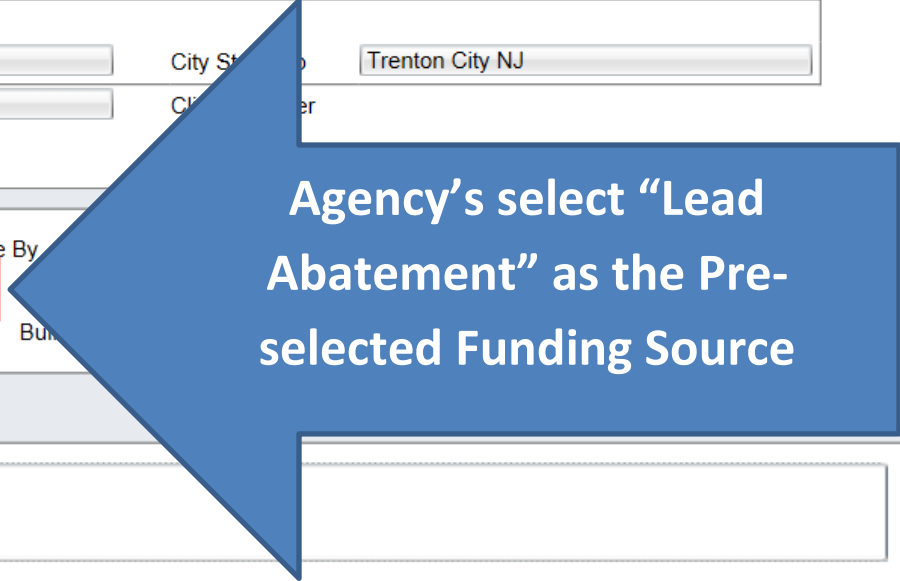
Add Comment

#### HOUSEHOLD DEMOGRAPHIC

Available Eligibility	<input type="text" value="---"/>				
Occupants	<input type="text"/>				
Elderly	<input type="text" value="0"/>	Children 6-17	<input type="text" value="0"/>	Children 3-5	<input type="text" value="0"/>
Children 0-2	<input type="text" value="0"/>	Disabled	<input type="text" value="0"/>		

#### LANDLORD INFORMATION

Name	<input type="text"/>	
Address	<input type="text"/>	
City	<input type="text"/>	
State	<input type="text"/>	Zip <input type="text"/>



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

**HEAT Enterprise**

- 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

**SELECTED MEASURES** Abatement Test

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

1: This value has been amended

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 **incurred** from lead evaluations conducted by NJDCA Certified Lead Evaluators for units that are **deferred**.





HEAT Enterprise

- 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

ADD INVOICE

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.**

## Add Indirect Cost

### Information

Agency Department of Community Affairs

Budget Type LP- Risk Assessment Deferred

Funding Source\*

Start Date\* 09/20/2017 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\* 09/30/2017

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
	There are no records available.

### - 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

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	Budget Type	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.



- HEAT Enterprise**
- 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
  - State Approval
  - Wage Approval
  - Change Audit Approval
  - Client Report
  - Configuration
  - Paid Statistical Report
- ▼ **INVENTORY**
  - Materials
  - Material Inventory
  - Measure To Material
  - Equipment

**EDIT INVOICE**

Invoice Number	16094	Invoice Date	None	Payment Date	None
Agency	Department Of Community Affairs	Payment Number	None		
Total Direct Costs (\$)	0.00	Total Indirect Costs (\$)	1,575.00	Invoice Total (\$)	1575

**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
[edit] [search] [delete]	LP- Risk Assessment Deferred	Lead Paint	2016	09/20/2017	09/20/2017		525.00	Risk Assessment for 123 AbatementDeferred Str 1234567
[edit] [search] [delete]	LP- Risk Assessment Deferred	Lead Paint	2016	09/20/2017	09/20/2017		525.00	Risk Assessment for 200 AbatementDeferred Str 0000001
[edit] [search] [delete]	LP- Risk Assessment Deferred	Lead Paint	2016	09/20/2017	09/20/2017		525.00	Risk Assessment for 300 AbatementDeferred Str 0000003

**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 lead remediation jobs **SHOULD** **NOT** be placed on the same invoice as lead abatement jobs.