KY Green: Adding Jobs & Service Costs

STEP 1: Login with your UserName and Password. Click the Login button.

STEP 2: Select the Year, Month and View Report

STEP 3: Check-Out Report for Editing

STEP 4: Under the Jobs tab, select Add New Job

STEP 5: Enter Client Demographics

STEP 6: Save New Job

STEP 7: Create Job Data for This Month

STEP 8: Select

STEP 9: Change Job Status

> Deferrals require a Status and/or Materials Explanation (if applicable).

- Walkaway: is agency driven
- Cancelled: is client driven

STEP 10: Enter DOE and LIHEAP Service Costs

STEP 11: Save

STEP 12: Edit, Exit, Create or Return
- **Edit:** Allows you to Edit the Service Costs for the Job entered
- **Exit Job Month:** Saves your information but takes you back to the Report screen
- **Create New Job:** Allows you to create another Job for that month
- **Return to All Jobs:** Returns you to the Monthly Job Report to proceed with billing

STEP 13: Return to All Jobs

STEP 14: Continue

STEP 15: Select "DOE"

STEP 16: Complete Sections:

- 2. DOE Program Income
- 3. Wx Inventory
- 4. HS Inventory
- 5. Total Wx and HS Inventory *(auto-populated)*
- 6. Completions and In-Progress Units for the Month *(auto-populated)*
- 7. Installed Materials *(auto-populated)*
- 1. Verify 702 Amounts and adjust, if necessary: Administration, WX Program Support, Liability Insurance, Financial Audit, T&TA and any necessary Adjustments.

STEP 17: Save, Download & Print

STEP 18: Sign and Date WX-702

> **Electronic Signature:** Utilizing PDF Pro:
>
> 1. Fill & Sign
> 2. Place Signature
> 3. Use an Image
> 4. Browse
> 5. Accept
> 6. Drag signature image to Signature line and drop
> 7. Add Text
> 8. Drop cursor in Date line and type in today's date
> 9. Print or Save in your electronic file library

STEP 19: Save & Continue

STEP 20: Repeat Steps 15-19 for LIHEAP

STEP 21: Under the Breakdown tab: Save & Exit or Submit Report

> **Error Messages:**
>
> 1. **Cannot Save or Submit Report:** If you exit the System when the "Cannot Save or Submit Report" error message is prompted, you will lose all data and will be required to reenter your information when you return.
>
> 2. **Cannot Submit Report:** If you exit the System when the "Cannot Submit Report" error message is prompted, the System will Save your data and you can return later to fix the issues.

STEP 22: E-Mail Communication – Status updates for submitted, approved and not approved.