

Part 2: Applying Individual Payments in Account Gateway

Using the paperwork that accompanied the Energy Assistance check, locate the first recipient on the list in Account Gateway.

Open the **Energy Assistance Program** table.

Click the **Add** icon.

Set the **Service Type** to 'E'.

Select the **Stat Code** to the Energy Assistance code using the dropdown menu.

The **Name for File** field auto-populates with the account holder's name.

Set the **Start Date** to before the Bill Date of when the funds may be used.

Enter the **Amount Available** according to the paperwork for the individual.

All other fields may remain empty.

Click **OK** to save the record.

Repeat with each additional account receiving Energy Assistance funds.

Account Gateway > Additional Information > Energy Assistance

Service Summary (BROWSE) Energy Assistance Program (BROWSE)

1 of 1

OK Cancel

Energy Assistance

Service type: E

Stat code: E-UA

Start date: 2019-07-26

Amount available: 200.00

Amount remaining: 200.00

State Id:

Name for file: DICAPRIO, LEONARDO

End date:

Amount used: 0.00

Energy Assistance Detail (BROWSE)

0 of 0

OK Cancel

Bill Date	Read Date	Stat Code	Submitted	Amount Applied
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Verify all received Energy Assistance funding applied to each recipient's account.

Go to the **Reports** module.

Open the **Energy Assistance Report**.

Energy Assistance funds may be reviewed by Account, Start Date, Stop Date, or Amount Available.

Enter the desired criteria.

Click **OK** to run the report.

Reports > Billing Reports > Energy Assistance Report

The report will automatically open.

Review the report. Compare the accounts to the listing of recipients received with the Energy Assistance funding check.

Print or **Save** the report per Utility procedure.

Review the following columns to ensure they are correct.

- Amount Available
- Amount Used
- Amount Left

Account Number	Name	Util State ID	Amount Available	Amount Used	Amount Left	Start Date	Stat Code	Stop Date
	LEONARDO DICAPRIO	E	500.00	183.46	316.54	08/01/2019	E-UA	
Subtotals for			500.00	183.46	316.54			
	BEN STILLER	E	200.00	132.37	67.63	08/01/2019	E-UA	
Subtotals for			200.00	132.37	67.63			
	RHEA PERLMAN	E	200.00	85.48	114.52	08/01/2019	E-UA	
Subtotals for			200.00	85.48	114.52			
Subtotals for		E	100.00	0.00	100.00	08/01/2019	E-UA	
Subtotals for		E	200.00	200.00	0.00	08/01/2019	E-UA	
Subtotals for		E	200.00	50.96	149.04	08/01/2019	E-UA	
Grand Totals			1400.00	652.27	747.73			