



VIRGINIA WEATHERIZATION ASSISTANCE PROGRAM Information Notice 08-2011

TO: ALL WEATHERIZATION SUBGRANTEES
FROM: NANCY PALMER, HOUSING PROGRAMS MANAGER
DATE: 05/10/2011
SUBJECT: DATABASE USER AUTHORIZATION

SUBGRANTEE ACTION IS REQUIRED BY 5/17/2011 !!!

DHCD is quickly approaching the implementation of Hancock Energy Software web based reporting system for weatherization programs. Local agencies need to consider who will fill the roles that will be responsible for input of your agency's required information and reports.

DHCD is planning its training schedule for those that will have direct involvement with the reporting process. Training schedules and locations will be announced in the very near future.

The persons assuming the following role(s) will need to be identified by your agency. In smaller agencies, DHCD expects that some of these roles will be overlapping. Agencies are urged to consider the need for multiple users while at the same time ensuring the security and integrity of the data entered into the system.

System Administrator: has overall access to the system and will be the 'go to' person managing your agency's reporting through the software; has access to client intake, Wx measures installed, job completions, budgeting and invoicing.

Client management/intake: reports all client data from intake to the beginning of the job process.

Weatherization job coordinator: reports all job data such as energy audit or work assessment, work orders, inventory, job completions, BWR and final inspection.

Financial and invoicing: compiles budgeting data, assigns expenses to cost sub categories and invoicing.

Reviewer: 'View only' authority of data and reports but with no ability to change data

Once each agency assigns these roles to individuals, they will be assigned a password and rights to view and enter data in the areas that the local agency may limit.

Please complete the blank form on Page 3 assigning staff names to each function. A staff member may have authority in multiple areas. Please mail the completed document, signed by the Executive Director, to Tom Stephens, DHCD, 600 E. Main St, Suite 300, Richmond VA 23219. We would appreciate your effort to mail it on or before 5/17/11.

EXAMPLE of how form should be completed:

ABC Community Action Agency, Inc 123 Main Street, Suite 456 Anytown, VA 12345					
Name/Title/Contact Number/Email	System Administrator	Client management/intake	Wx job coordinator	Financial and invoicing	Reviewer
Paul Pillsbury, Weatherization Program Mgr.; 804-555-1213; ppillsbury@abcaa.org	X		X		X
Kasey Kellogg, Financial Officer; 804-555-1214; kkellogg@abcaa.org				X	
Harry Hunt, Executive Director; 804-555-1111; hhunt@abcaa.org					X
Betty Barksdale, Intake Specialist; 804-555-1215; bbarksdale@abcaa.org		X			
Jimmy Jones, Weatherization Inspector; 804-555-1216; jjones@abcaa.org			X		

AGENCY APPROVAL: *Harry Hunt* Harry Hunt, Ex. Director

5-17-11 Date

WAP ONLINE USER AUTHORIZATION FORM

Subgrantee Agency Name and Address:

Name/Title/ Contact Number/Email	System Administrator	Client management/ intake	Wx job coordinator	Financial and invoicing	Reviewer

AGENCY APPROVAL:

Signature

Name/Title

Date

Return the completed document to Tom Stephens, DHCD, 600 E. Main St, Suite 300, Richmond VA 23219