

## Common Application Reports (Right click on page listed)

- **Purpose of common application reports:**
  - Real-time data; right-click menu options
  - Access granted by Agency Admin Team
  - Print applications for client signature or local files
  - Print referrals or details for client benefit/reminder
  
- **Household Intake & Referral 12 month summary (Referral page)**
  - Right click in the middle container (right side of page)
  - Displays Head of Household data and address information
  - Lists all household members and basic demographic data
  - Lists referrals made for all household members in the past 12 months
  - Common use: signed by client and kept on file at the agency
  
- **Client Referral Report (Referral page)**
  - Right click in the middle container on right side of page (Eligibility Listing container)
  - Displays Head of Household, address, county, programs referred to (program, service, contact, location, start date)
  - Common use: Summary to print for client as a reminder/checklist; also contains referral contact info (if that data is setup in the referral tables)
  
- **Referral Form (Referral page)**
  - Right click in the bottom right container (Referrals container)
  - Displays Head of Household, SSN, date address, phone, program, contact, completed, service received, and description of services.
  - Common use: Form signed by caseworker validating that the CAA made the referral for the client to the particular referral agency
  
- **Client Comments (Assessment page)**
  - Select the 'Comment' button in the upper right corner of the page
  - Right click in the container on the right (Notes container)
  - Displays Head of Household name, note date, note entered by, consent, note
  - Common use: to print comments for the client file

- **LIHEAP/Emergency Assistance Application (Vendor & Payments page)**
  - Right click on page, select Preview Application Report
  - New window will open, select Missouri Heap Application
  - Displays Head of Household, SSN, address, county, phone number, date of birth, household members (name, relations, SSN, DOB, age, sex, race, hispanic (y/n), education, income source, monthly income, deduction type, deducted amount, gross income, total deductions, net income, total resources, household members that are disabled, assessment questions and answers, program info
  - Common use: to print application for QC/approval process and files
  
- **Missouri Housing Trust Fund (Vendor & Payments page)**
  - Right click on page, select Preview Application Report
  - New window will open, select Missouri Housing Trust Fund Application
  - Displays agency, county, date of application, applicant name, address, phone, gender, photo id, household members, disabled, veteran, 90 day household income for each income source, payment assistant type, amount requested, vendor name, vendor telephone, address, date, approved by, amount paid, check number, all referrals made and the estimated value of those referrals
  - Common use: Replaces the existing paper or PDF fillable application form; if all data is entered, can be used for monthly/quarterly MHTF reports (still under development as of 5/5/08).
  
- **Batch (Payment) Notification Letter (Batch Info page)**
  - Right click in middle container (Transaction Batches container)
  - Displays Head of Household address info, date, letter stating program, vendor, date, amount, check number
  - Common use: Prints letters for all transactions within the selected batch(es); letters used to notify clients that a payment was made on their behalf
  
- **Batch Application Report (Batch Info page)**
  - Right click in middle container (Transaction Batches container)
  - Displays vendor, batch number, batch date, check number, SSN, name, account number, location/site, application date, decision date, amount, total number of batches
  - Common use: Real-time batch report for the selected batch(es); returns each batch on a separate page in the same format as the Management Batch Report;