

FPL Assist Web Portal Viewing Reports

Introduction

At the end of this module, you will be able to perform the following tasks in the FPL Assist Web Portal for your agency:

- View Transmittal Reports
- View Expiration Reports

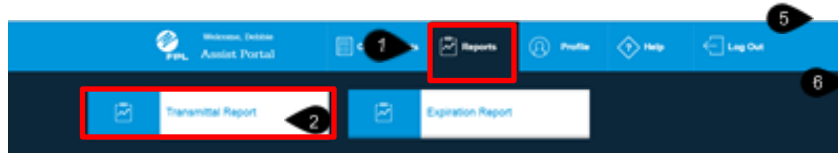
Transmittal reports are used to view or modify active commitments for your agency. This report can be printed and used to submit payments to FPL.

Let's first review the steps for using the Transmittal Report.

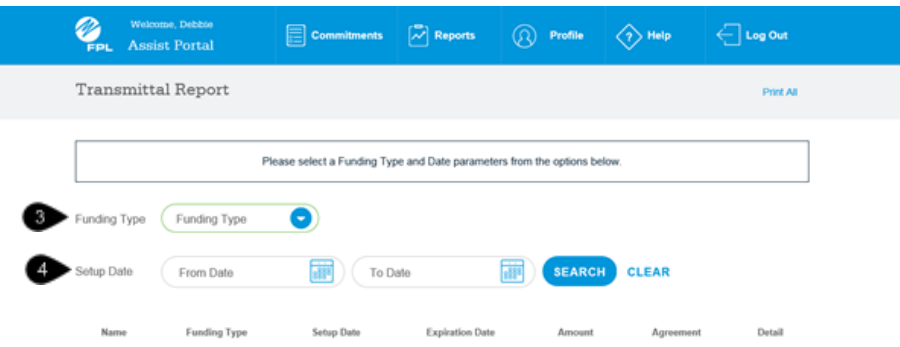


Transmittal Report

The following information provides steps for viewing the Transmittal Report.



Step	Action
1	Select Reports Result: Transmittal Report menu is displayed
2	Select Transmittal Report card Result: Transmittal Report is displayed
3	Click drop-down arrow to select funding type Result: Funding types will be displayed
4	Select Setup From Date from calendar Note: This is the starting date of commitments you want to view
5	Select Setup to Date from calendar Note: This is the ending date of commitments you want to view
6	Click Search to execute search Result: Active commitments for your agency are displayed



Let's review the window and results that will be displayed.

Viewing Active Agency Commitments

Follow the steps on the table below for using the Transmittal Report window.

Section	Name	Function
A	Name	Displays name on the customer's account
B	Funding Type	Displays commitment funding type
C	Setup Date	Displays date that the commitment was set up
D	Expiration Date	Displays expiration date of commitment
E	Amount	Displays commitment amount
F	Agreement	Select to print Commitment Agreement Letter
G	Detail	Select to view commitment details Result: Detail section displays
H	Print All	Select to print all active commitments displayed

Transmittal Report Print All

To request a commitment extension, please click on the customer name. If customer is not eligible, you will not be able to click.

Funding Type:

Setup Date:

Displaying 32 records with \$9,364.67 in total commitments

Name	Funding Type	Setup Date	Expiration Date	Amount	Agreement	Detail
ABC CUSTOMER	EHEAP	Oct 19, 2017	Dec 18, 2017	\$600.00		
ABC CUSTOMER	EHEAP	Oct 19, 2017	Dec 18, 2017	\$100.00		
ABC CUSTOMER	EHEAP	Oct 20, 2017	Dec 19, 2017	\$1,029.54		
ABC CUSTOMER	EHEAP	Oct 20, 2017	Apr 4, 2016	\$23.00		
ABC CUSTOMER	EHEAP	Oct 20, 2017	Apr 4, 2016	\$100.00		
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$100.00		
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$200.00		
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$300.00		
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$100.00		
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$899.99		
ABC CUSTOMER	EHEAP	Oct 24, 2017	Apr 16, 2016	\$0.01		

Name	Funding Type	Setup Date	Expiration Date	Amount	Agreement	Detail
ABC CUSTOMER	LHEAP	Oct 19, 2017	Dec 18, 2017	\$500.00		

Account Number: 9876543210 Service Address: 123 Customer Ln, Miami, FL 11111 Agent Representative: Agent 1



Note: Your authorization level may cause the accounts to be displayed in grey and will not be active links.

Transmittal Reports – Modifying Commitments

Follow the steps on the table below to view and use the Transmittal Report window.

Transmittal Report Print All

To request a commitment extension, please click on the customer name. If customer is not eligible, you will not be able to click.

Funding Type: EHEAP

Setup Date: 07/30/2017 10/26/2017 SEARCH CLEAR

Displaying 32 records with \$9,364.67 in total commitments

Name	Funding Type	Setup Date	Expiration Date	Amount	Agreement	Detail
TYLER C MULLIS	EHEAP	Oct 19, 2017	Dec 18, 2017	\$600.00		
ABC CUSTOMER	EHEAP	Oct 19, 2017	Dec 18, 2017	\$100.00		
ABC CUSTOMER	EHEAP	Oct 20, 2017	Dec 19, 2017	\$1,029.54		
ABC CUSTOMER	EHEAP	Oct 20, 2017	Apr 4, 2016	\$23.00		
ABC CUSTOMER	EHEAP	Oct 20, 2017	Apr 4, 2016	\$100.00		
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$100.00		
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$200.00		
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$300.00		
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$100.00		
ABC CUSTOMER	EHEAP	Oct 23, 2017	Apr 15, 2016	\$899.99		

Request Commitment Extension

Are you sure you want to request a 30 day expiration date extension for this commitment?

THERESA A OMALLEY
7838037146

2 SUBMIT Cancel

Step	Action
1	Click on blue active link for account that will be modified Result: Request Commitment Extension window is displayed
2	Select submit to extend expiration date for 30 days
3	Print Commitment Agreement Letter

Important: A commitment can only be **modified once**. If it has already been modified, the link for the customer's name will be in grey and will not be an active link.

This commitment will **not be able** to be modified. Contact your Area Manager for assistance.

Expiration Report

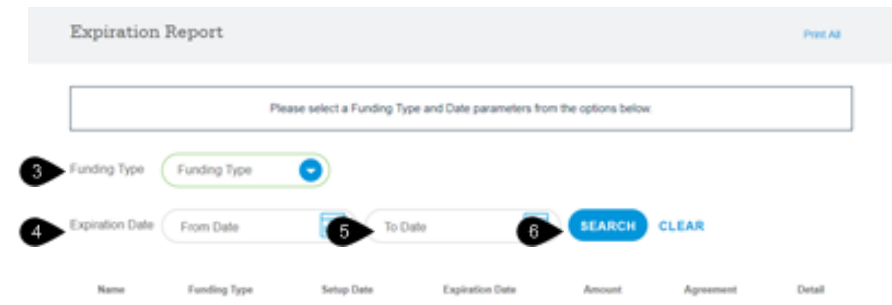
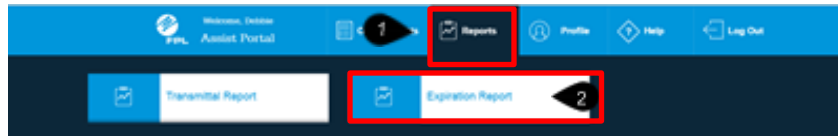
An Expiration Report is used to view all active commitments by expiration date. This report can be used if you want to view commitments that are about to expire and/or extend past the expiration date(s).

Now let's review the steps for using the Expiration Report.



Expiration Report (cont.)

The following information provides steps for viewing the Expiration Report.



Step	Action
1	Select Reports Result: Report menu is displayed
2	Select Expiration Report card Result: Expiration Report is displayed
3	Click drop-down arrow to select funding type Result: Funding types will be displayed
4	Select Expiration From Date from calendar Note: This is the starting expiration date of commitments you want to view
5	Select Expiration to Date from calendar Note: This is the ending expiration date of commitments you want to view
6	Click Search to execute search Result: Commitments for your agency are displayed in order of expiration date

Let's review the Expiration Report window and results that will be displayed.

Expiration Report (cont.)

Follow the steps on the table below for how to use the Expiration Report.

Name	Funding Type	Setup Date	Expiration Date	Amount	Agreement	Detail
ABC Customer	EHEAP	Oct 19, 2017	Dec 18, 2017	\$600.00		▼
ABC CUSTOMER	EHEAP	Oct 19, 2017	Dec 18, 2017	\$100.00		▼
ABC CUSTOMER	EHEAP	Oct 20, 2017	Dec 19, 2017	\$1,029.54		▼
ABC CUSTOMER	EHEAP	Oct 20, 2017	Dec 19, 2017	\$23.00		▼

Step	Action
Expiration Report	
1	View commitment expiration dates and details
2	Click on blue active link for account that will be modified Result: Request Commitment Extension window is displayed
3	Select submit to extend expiration date for 30 days
4	Successful commitment message is displayed Repeat steps 1 – 3 until all commitments are complete

Your commitment was successfully extended.

Important: A commitment can only be **modified once**. If it has already been modified, the link for the customer's name will be in grey and will not be an active link.

This commitment will **not be able** to be modified. Contact your Area Manager for assistance.