GOAL TEMPLATE CATEGORY HOOKS FOR CUSTOM CLIENT ENERGY GOAL TEMPLATE

These are categories to be used when creating your custom agency goal template for Energy. Each goal step should be in one of these categories.

AUTOMATIC MANDATORY CATEGORIES

All steps are marked as completed with the <u>current date</u> when the corresponding activity is completed in FuelWare. Due dates are set for the end of the program year when the goal is automatically created at the end of intake. (The goal steps' start date is also the marked with the current date).

- Intake / Application
- Certification
- Eligibility Calculator

AUTOMATIC OPTIONAL CATEGORIES

All steps are marked as completed with the <u>current date</u> when the corresponding activity is completed in FuelWare. The start and due dates are also marked with the current date.

- Fuel Payment
- Utility Payment
- Heat-in-Rent Payment

OPTIONS FROM CLIENT GOAL PAGE

The start, due, end completion dates are marked with the date entered in the software (it defaults to the current date).

- Option: Intake Worker
- Option: Office Worker