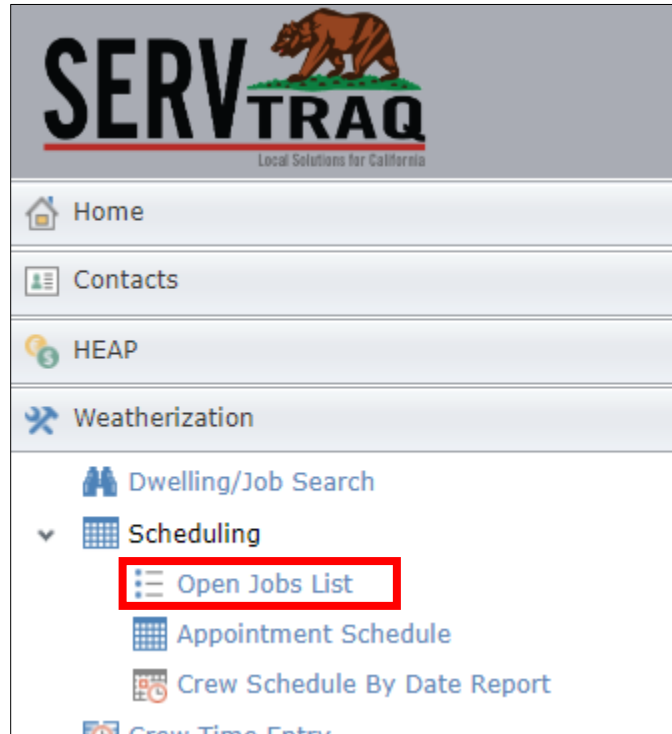# Unlink and Relink the Eligibility Record on a Job

Step 1

Navigate to the Open Jobs List under the Weatherization tab. Use the search box to locate the dwelling.

Step 2

Click on the Job ID to open the job.

Step 3

Click **View/Edit Eligibility Record** to verify the existing eligibility record.

In this case, the existing eligibility record is a transferred 2022 LIHEAP Fast Track application. This needs to be unlinked for a job with 2023 LIHEAP measures.

Step 4

Return to the Job and click **Unlink** at the top.

Step 5

This will prompt a dialog box to open. Click **OK** to unlink the eligibility record.

After unlinking the eligibility record, both the customer and the eligibility record fields will be blank.

Step 6

Click the dropdown list for Customer. Enter in the name or any other identifying information for the customer. Select the correct customer from the dropdown list.

Once selected, the customer will appear in the field.

Step 7

Under **Existing Eligibility** Record, click **NEW**.

Step 8

A new window will open to add the eligibility record. Complete all the required fields.

Step 9

After the new eligibility record has been added, it will appear in the dropdown list. Select the newly added eligibility record.

Once the new eligibility record has been selected, it will appear in the field.

Step 10

Click **Link** at the top.

Step 11

This will prompt a dialog box to open. Click **OK** to link the new eligibility record.

× Dele | servtraqazure.com says | Clone Job | Mark Covid-19 Partial

Do you really want to link this job to the selected eligiblity and occupant records?

OK Cancel

90807

Link Eligibilty

Customer: JACK RIPPER ▼

Existing Eligibility Records: 119484 ▼

Customer:

Eligibility: