

ServTraQ Barcoded Applications

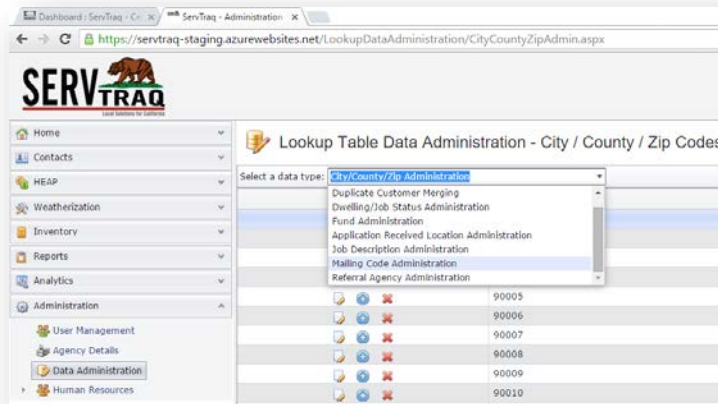
Background

ServTraQ Barcoded Applications are a replica of the CSD 43 Form used for the purpose of automating compliance with the CSD 15 Day Notification requirement.




Barcoded Applications are generated by entering a *customer contact entry* with a *mailing code*. Upon return of the form, staff only needs to *scan and receive* the application in ServTraQ to create an electronic receipt record and generate a Notification Letter (mail-out envelope) to streamline the notification process.

Getting Started

You'll need to configure the ServTraQ mailing codes to generate a *barcoded application* instead of a *mail-out envelope*. To do, go to **Administration>Data Administration>Mailing Code Administration**.



We've preset a list of mailing codes to get you started. You can add, delete, or edit existing codes using the following commands:

	Click the addition icon to add a mailing code.
	Click the x icon to delete an existing mailing code. Note: Only codes without associated records can be deleted.
	Click the Pencil icon to edit an existing mailing code.

Field	Description
Mailing Code	Up to 4 characters are allowed. Do not include spaces. (Ex: AR)
Description	Use the description field to write the definition of the code. (Ex: Application Request)
Service Order	Numeric field used to outline the document mail-out order. Ex: Service Order 1: HEAP Application Request Service Order 2: HEAP Application Received Notification Letter Service Order 3: HEAP Benefited/Denied Notification Letter
Generate Application	Checkmark the box if the code should generate a barcoded application. If this box is not checked, a mail-out envelope will be generated instead.

Welcome 60000/Garcia! [Log Out] [Change Password] [Contact ServTraq Support]

Home Contacts HEAP Weatherization Inventory Reports Analytics Administration User Management Agency Details Data Administration Human Resources

Lookup Table Data Administration - Mailing Codes

Select a data type: Mailing Code Administration

Mailing Code	Description	Mailing Code Use	Service Order	Generate Application
AC	HEAP APPLICATION + (WITH) CARE	CONTACT ENTRY	2	<input type="checkbox"/>
AD	BENEFITTED DWAP	APPLICATION ENTRY	0	<input type="checkbox"/>
AM	ASSURANCE 16 + (WITH) WSAG + (WITH) SUB CARE	APPLICATION ENTRY	0	<input type="checkbox"/>

Mailing Code:* AC Description:* HEAP APPLICATION + (WITH) CARE
 Service Order:* 2 Generate Application:* ☒

Step 1: Create a Barcoded Application

A. Customer Search/Contact Entry in ServTraq

Open the *Contacts* tab and click **Customer Search/Contact Entry**. Search for the customer using any or all of the contact information provided and click **submit**.

Home Contacts Customer Search/Contact Entry Callbacks Customer Contacts HEAP Weatherization Inventory Reports Analytics Administration

Customer Search/Incoming Contact Entry

Search Parameters

Name: JULIE GARCIA
 Social Security Number: _____
 Home Phone: 831 9876543
 Date of Birth: _____
 Mailing Address: Street # Street Name Unit Number
 Mail Zip/City: Zip Code City

Submit Clear

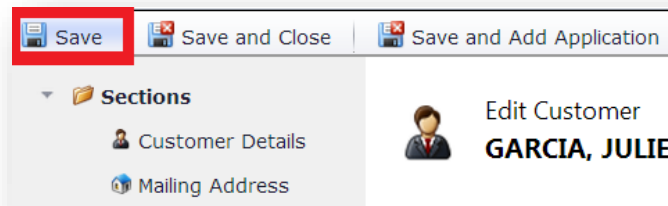
New Customer Edit Customer Refresh List Export List

First Name	Last Name	SSN	Date of Birth	Mailing Address
JULIA	GARCIA	767676761	7/13/1988	000 BERRY

B. Customer Record

If a match is found, click on the customer's first **name-link** to open the customer record. Make any updates to the contact information if necessary and add a **contact entry note**.

If a match is not found, click **New Customer**, the information entered during the search will populate into the customer record. Click **Save** to create the customer record. Proceed to add a **contact entry note**.



C. Contact Entry Note

A *Contact Entry Note* is made to track **incoming** or **outgoing** contact with customers as well as streamline other related tasks; such as document mail-outs.

Scroll to the **Contacts** section within the *customer record*. Click the **addition** icon and enter the fields listed in the table below. Click the **floppy disk** icon to save the entry.

Contacts								
	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
Contact Date	1/24/2014 9:26:28 AM	Contact Type	INCOMING					
Contact Action	APPLICATION REQUESTED	Call Code	APPLICATION REQUEST					
Language	ENGLISH	Notes						
Mailing Code	AP - FIRST TIME(HEAP APPLICATION) WITH INSTR							

Entry Field	Description	
Contact Date	Defaults to the current date and time	Default
Contact Type	Incoming -Customer initiates contact with the agency Outgoing -Agency initiates contact with the customer	Required*
Contact Action**	The Contact Action entered describes the action	Required*
Call Code**	Select the Call Code that best fits the situation	Required*
Language	The language selected determines the application language (English or Spanish available).	Required*
Mailing Code**	The Mail Code identifies application and any other documents to include.	Optional
A complete list of the Call Codes, Contact Action Codes, and Mail Codes can be found in Appendix A.		

Step 2: Print Barcoded Applications

- A. Go to ServTraq, **Reports>Daily Reports>Barcoded Applications**

Do not change the date parameters! The report automatically defaults to the *applications not printed*.
Note: Only change the date parameters if the applications did not print correctly or if there was an error while printing.

- B. Click the **print** icon and set the Print Dialogue Box settings to:
- Print **All** pages
 - **Fit** Page Size

- **Print on Both Sides and Flip on Long Edge**
- **Portrait Orientation**
- **Set the paper size to Letter (8 1/2x 11")**

SERVTRAQ
Local Solutions for California

Home
Contacts
HEAP
Weatherization
Inventory
Reports

▼ Daily Reports
File Labels
Barcoded Applications
Envelopes From Contacts
Mailing Labels From Contacts
Denial Letters
CSD Data Change Requests
Commitments to Send to Utility
CARE Applications to Send to Utility
Appointment Reminder Postcards

Barcoded Applications from Contact Entry

Report Parameters

Start Date: 1/11/2016
End Date: 1/11/2016
Printed?: ☐
Return Address: 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076

Submit

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Department of Community Services and Development
Energy Intake Form
CSD 43 (11/2015)

Agency:		Intake Initials:	Intake Date:
First Name	Middle Initial	Last Name	Date of Birth MM/DD/YY
Mailing Address			Unit Number

Official Use Only:	
Priority Points	
A.C.C.	
Eligibility Cert Date	
Job Control Code	

- C. Use **size 10 double window envelopes** to mail out these documents.

Note: Applications have the barcode, address and mail/language codes on both the first and second pages.

Department of Community Services and Development
Energy Intake Form
CSD 43 (11/2015)

Agency: Intake Initials: Intake Date:

First Name Middle Initial Last Name Date of Birth
MM/DD/YY

Mailing Address Unit Number

Mailing City Mailing County Mailing State Mailing Zip Code

SERVICE ADDRESS - Address where applicant lives (this cannot be a P.O. Box)

Is your service address the same as mailing ☐ Yes ☐ No
Have you lived at this residence during each of the past 12 months ☐ Yes ☐ No

Service Address Unit Number

Service City Service County Service State Service Zip Code

Social Security Number (SSN) Telephone Number: () Message Only?

E-mail Address (Optional):

PEOPLE LIVING IN HOUSEHOLD
Enter the total number of people in the household, including the applicant

INCOME
Enter the number of household members who receive income

Demographics - Enter the number of people who are:

Ages 0 to 2 Years	TANF / CalWorks	\$
Ages 3 to 5 Years	SSI / SSP	\$
Ages 6 to 18 Years	SSA / SSDI	\$
Ages 19 to 59	Paycheck(s)	\$
Ages 60 and Older	Interest	\$
Disabled	Pension	\$
Native American	Other	\$
Seasonal or Migrant Farmworker	Total Income	\$

HOUSEHOLD MEMBERS (Optional)
FULL NAME: Full name is First Name, Last Name.
RELATIONSHIP TO THE APPLICANT: For example: husband, daughter, friend, aunt, grandfather, etc.
DATE OF BIRTH: List the date of birth of each household member.
AMOUNT OF MONTHLY GROSS INCOME: "gross" income means the amount of money received before taxes or anything else is taken out. If you have more than 8 people in your household, you can write the information on a separate piece of paper.

First Name	Last Name	Relation to Applicant	Date of Birth MM/DD/YY	Amount of Monthly Income	Source of Income

TEST AGENCY
135 AVIATION WAY, STE 7
WATSONVILLE CA 95076

JULIE GARCIA
555 MAIN ST APT 1
WATSONVILLE, CA 95076

E: Application Language.
AP: Mailing Code.

Additional Resources

Related Videos

- ✓ Applications for Written Notification Compliance: [Video](#)
- ✓ Customer Record: [Video](#)
- ✓ Contact Entry: [Video](#)

Related Section Articles

- ✓ Print Settings for Barcoded Applications: [Article](#)
- ✓ Receiving Applications in ServTraq for CSD 15 Day Written Notification Compliance: [Article](#)
- ✓ Contact Entry: [Article](#)

ServTraq Manual: <http://ServTraq.com/Nimbus1.html>

ServTraq Support: Support@ServTraq.com