

# LIHEAP Payment Assistance Notification Letters

## 1.0. Background

Local Service Providers are required to provide written notification to customers of their LIHEAP Payment Assistance Application eligibility. The ServTraq © **HEAP Benefit and Denial letters** solution generates standardized notification letters based on the *Application Status* selected during *Payment Assistance Application Data Entry*. Notification letters are only available in *English* or *Spanish* depending on the language selected during entry (*see attachment 1 for letter template examples*).

This solution offers the ability to streamline time consuming processes, maintain electronic records for contract compliance, and reduce associated costs. Development of electronic notifications is in progress, so start collecting those emails for a more efficient way of compliance.

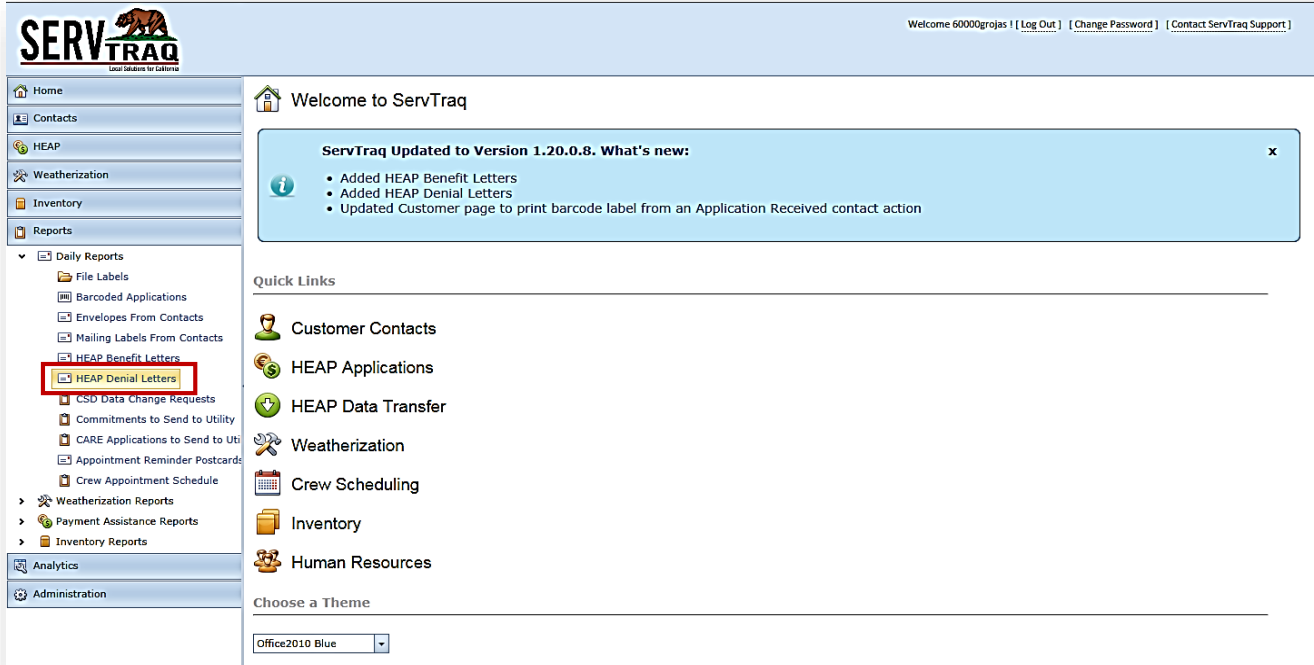
## 1.1. Procedure

Before printing the HEAP Denial or Benefit Letters please read the **Recommendations (1.3.)**, and **Warnings & Attention (1.4)** sections.

### 1.1.1. Denial Notification Letter

To print ServTraq© HEAP Denial Letters go to:

1. **Reports** select **Daily Reports** and click on **HEAP Denial Letters** from the drop down list.



2. The report displays Denial Letters, not printed. Only change the report parameters to reprint letters.

- a. If your agency has multiple “Agency Locations” you can change the default return address by clicking the “Return Address” drop down list.
  - i. Note: To set “Agency Locations” see **section 1.2.2**.
- b. An agency phone number can also be added to the template by typing it in.
- c. Click **Submit** to apply the changes (if any).

WELCOME 60000grojas | [ Log Out ] | [ Change Pass ]

**SERVTRAQ**  
Local Solutions for California

Home  
Contacts  
HEAP  
Weatherization  
Inventory  
Reports  
Daily Reports  
File Labels  
Barcoded Applications  
Envelopes From Contacts  
Mailing Labels From Contacts  
HEAP Benefit Letters  
HEAP Denial Letters  
CSD Data Change Requests  
Commitments to Send to Utility  
CARE Applications to Send to Utility  
Appointment Reminder Postcards  
Crew Appointment Schedule  
Weatherization Reports  
Payment Assistance Reports  
Inventory Reports  
Analytics  
Administration

**Denial Letters**

Report Parameters

Start Date:\* 3/24/2016  
End Date:\* 3/24/2016  
Printed?: ☐  
Return Address:\* 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076  
Agency Phone Number:\* ( ) -

Submit

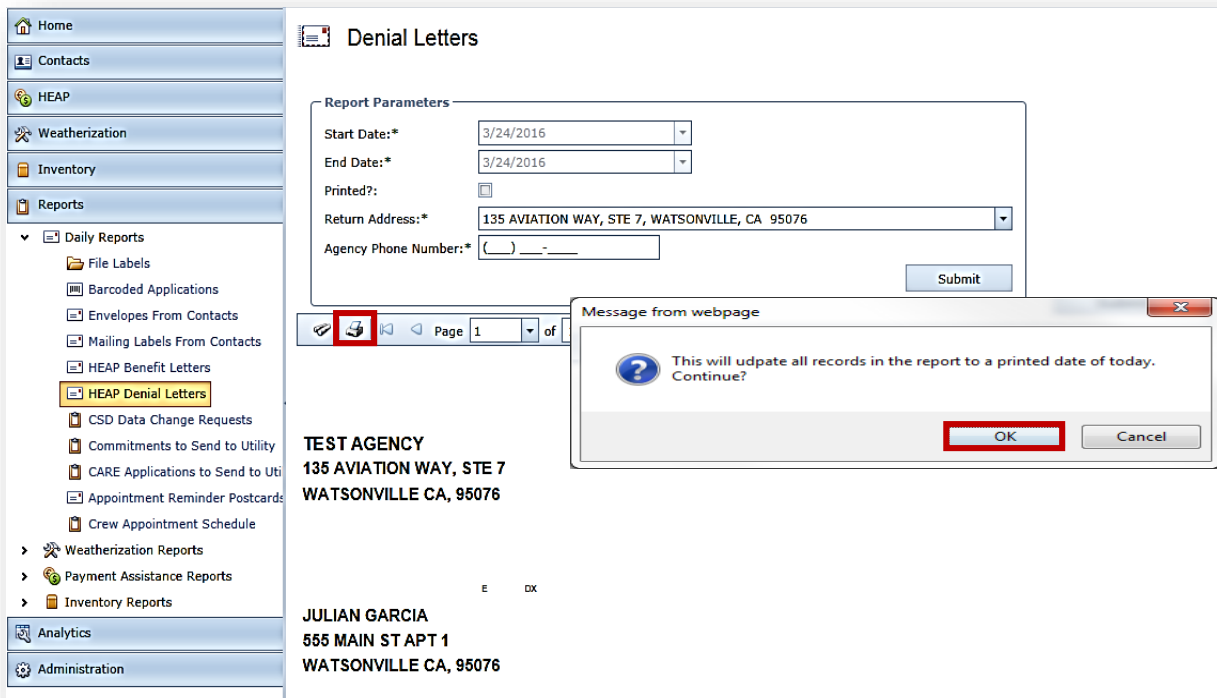
Page 1 of 1 Pdf

**TEST AGENCY**  
135 AVIATION WAY, STE 7  
WATSONVILLE CA, 95076

**JULIAN GARCIA**  
555 MAIN ST APT 1  
WATSONVILLE CA, 95076

Date: 3/24/2016

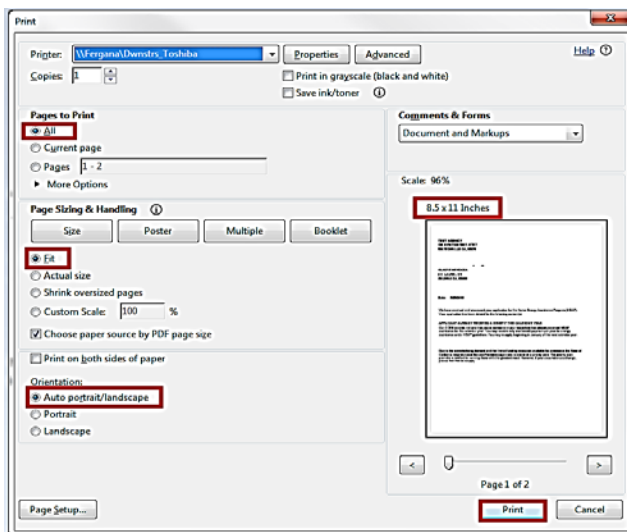
3. Once satisfied with the changes click the **Print icon**. This will pop up a message from the webpage, click **Ok** to print and clear report.



4. Change your printing settings to the following:

- Print **ALL** pages
- **Fit Page Size**
- **Auto Portrait/Landscape**
- Paper Size: **8.5 X 11Inches**

5. Finish by clicking **Print**

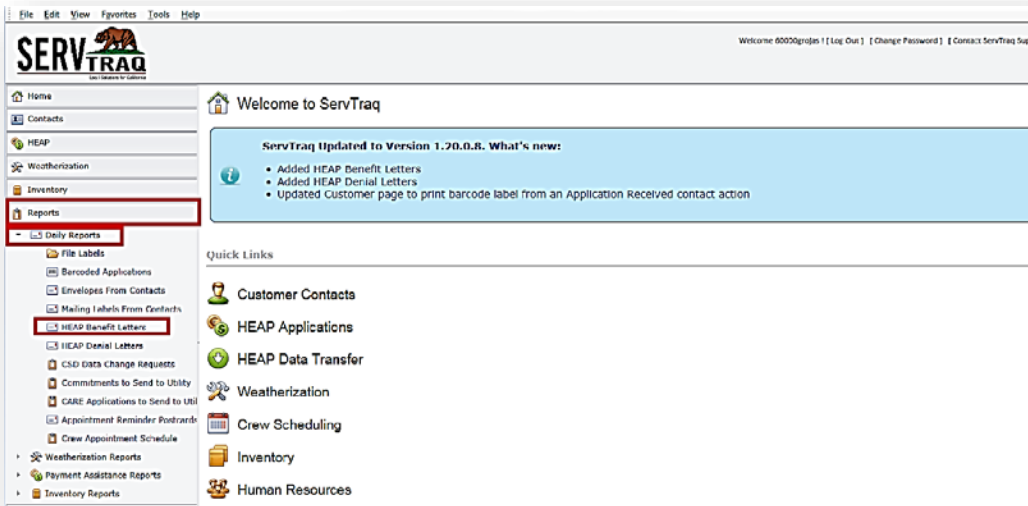


### 1.1.2. Benefit Notification Letter

To generate ServTraq® HEAP Benefit Letters, an (enabled) “Intake Location<sup>1</sup>” must be selected during the Application Data Entry and the application must have a status of *Transferred*.

To print ServTraq® HEAP Benefit Letters go to:

1. **Reports** select **Daily Reports** and then click on **HEAP Benefit Letters** from the drop down list.



2. The report displays Benefit Letters, not printed. Only change the report parameters to reprint letters.
  - a. If your agency has multiple “Agency Locations” you can change the default return address by clicking the “Return Address” drop down list.
    - i. Note: To set “Agency Locations” see section 1.2.2.
  - b. An agency phone number can also be added to the template by typing it in.

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<sup>1</sup> See section 1.5. for information on how to enable Intake Locations.

- c. Click **Submit** to apply the changes (if any).

WELCOME 60000grojas | [Log Out] | [Change Password] | [Contact ServTraq Support]

### SERVTRAQ

Local Solutions to Global Problems

- Home
- Contacts
- HEAP
- Weatherization
- Inventory
- Reports
  - Daily Reports
    - File Labels
    - Barcoded Applications
    - Envelopes From Contacts
    - Mailing Labels From Contacts
    - HEAP Benefit Letters**
    - HEAP Denial Letters
    - CSD Data Change Requests
    - Commitments to Send to Utility
    - CARE Applications to Send to Utility
    - Appointment Reminder Postcards
    - Crew Appointment Schedule
  - Weatherization Reports
  - Payment Assistance Reports
  - Inventory Reports
- Analytics
- Administration

#### HEAP Benefit Letters

Report Parameters

Start Date:\* 3/29/2016

End Date:\* 3/29/2016

Printed?: ☐

Return Address:\* 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076

Agency Phone Number:\* ( ) - -

**Submit**

TEST AGENCY  
135 AVIATION WAY, STE 7  
WATSONVILLE CA, 95076

GLADYS MENDOZA  
911 LAUREL DR  
SALINAS CA, 93906

3. Once satisfied with your agency return address click the **Print icon**. This will pop up a message from the webpage, click **Ok** to print and clear report.

WELCOME 60000grojas | [Log Out] | [Change Password]

### SERVTRAQ

Local Solutions to Global Problems

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#### HEAP Benefit Letters

Report Parameters

Start Date:\* 3/29/2016

End Date:\* 3/29/2016

Printed?: ☐

Return Address:\* 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076

Agency Phone Number:\* ( ) - -

**Print**

TEST AGENCY  
135 AVIATION WAY, STE 7  
WATSONVILLE CA, 95076

GLADYS MENDOZA  
911 LAUREL DR  
SALINAS CA, 93906

Message from webpage

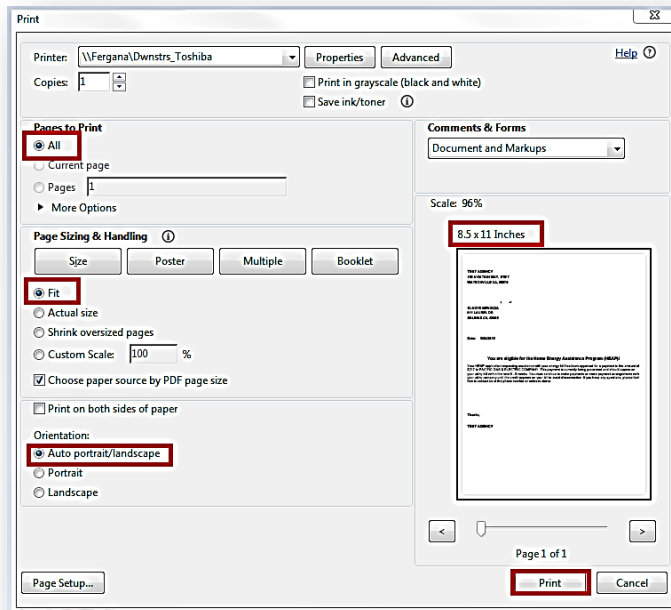
This will update all records in the report to a printed date of today. Continue?

**OK** **Cancel**

4. Change your printing settings to the following:

- Print **ALL** pages
- **Fit** Page Size

- **Auto Portrait/Landscape**
  - **Paper Size: 8.5 X 11 Inches**
5. Finish by clicking **Print**.

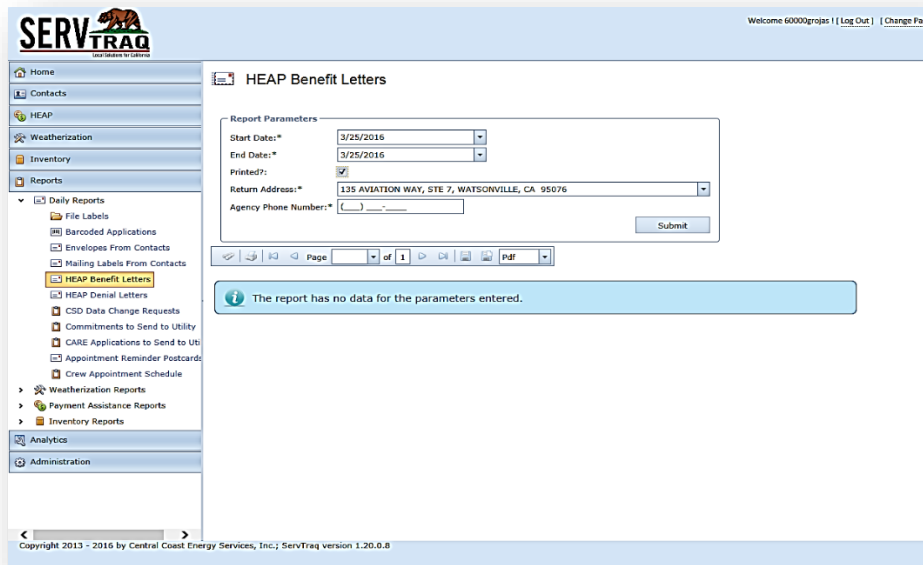


## 1.2. Tips

### 1.2.1. Reprinting

If you need to reprint the notification letters follow these steps:

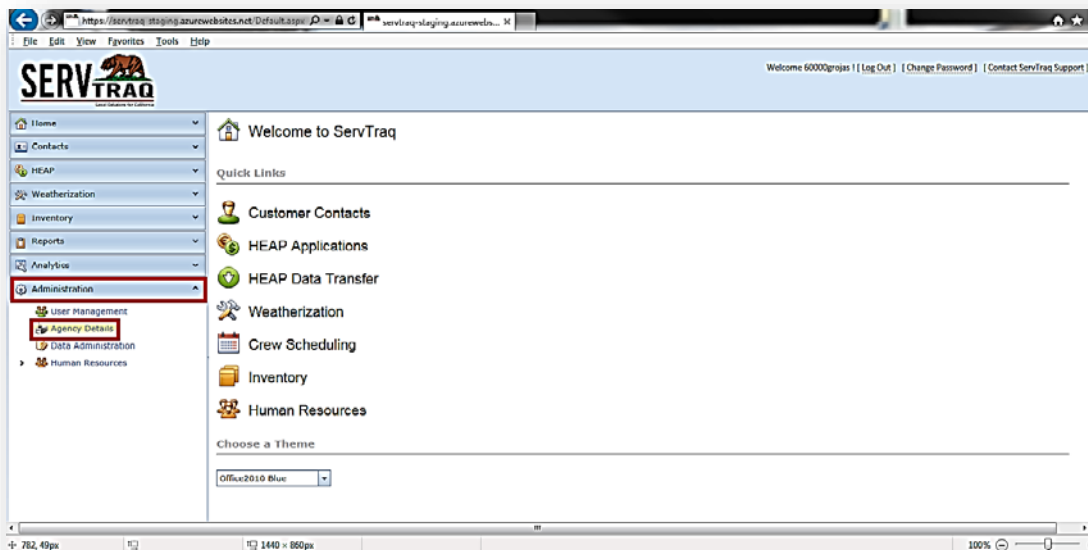
- Open the Report
- Click **Printed?** Box
- Set the Date
- Click **Submit**.



### 1.2.2. Agency Locations

If your agency has more than one location, you can add “locations” to select from when generating the notification letters. Only users with “Admin” permissions will be able to add “locations”. To add an agency location go to:

1. **Administration** select **Agency Details**.



2. Under the Agency Locations, click the **addition** icon to add an Agency Location.

Field	Entry
Display Name	Agency Name
Address	Agency Address
Active	Checkmark the box if you want to use this address in your reports
Default Address	Checkmark the box if this is the main office location
Mailing Address	Checkmark the box if you want to use this address to populate in your reports

3. Click **Save and Close** to apply changes.

Agency Details

Name:

Agency Phone #:

Agency Alt. Phone #:

Agency Fax #:

Use Benefic Calculations?: ☐







	Display Name	Address Line1	Address Line2	City	State	Zip Code	Active	Default Address	Mailing Address
	CENTRAL COAST ENERGY SERVICES, INC.	723 E LAKE AVE. STE. F		WATSONVILLE	CA	95076	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	CENTRAL COAST ENERGY SERVICES, INC.	135 AVIATION WAY, STE 7		WATSONVILLE	CA	95076	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	CENTRAL COAST ENERGY SERVICES, INC.	PO BOX 2707		WATSONVILLE	CA	95077	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	CITY OF WATSONVILLE	320 HARVEST AVE		WATSONVILLE	CA	95076	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

### 1.2.3. Electronic Record

An electronic record of the notification letter is registered and visible to everyone within the organization under the ServTraq *Customer Record, Contact Entry* section. When a PA application is entered, the system generates a notification letter based on the *application status* selected.

A contact entry is posted to the customer record tracking the notification type (benefitted (A16)/denied). A mailing date is posted to the contact entry when the user prints the notification letters. This feature enables agencies to maintain compliance with CSD contract requirements, and helps eliminate the need to keep copies of notifications in customer files.

Example: Below shows what type of notification letter customer will receive (Benefit or Denial) and the date the letter was mailed to customer.

Contacts									
	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date	
  	3/29/2016	OUTGOING	PROGRAM/APPLICATION INFO GIVEN	NO ACTION REQ - RECORD ONLY	ENGLISH	ADDED FROM APPLICATION ENTRY	AT - ASSURANCE 16 + (WITH) WSAG + (WITH) CARE	3/29/2016	
  	3/28/2016	OUTGOING	PROGRAM/APPLICATION INFO GIVEN	NO ACTION REQ - RECORD ONLY	ENGLISH	DENIAL ADDED FROM APPLICATION ENTRY	DM - DENIAL LETTER(ELIG/NOT IN PRI) + (WITH) WSAG-(W/O)CARE		

#### 1.2.4. Mailing Codes on the Application

The tiny codes printed on the notification letters are used to identify additional documents to include with the notice (if any). *Please note: This is **optional**.*

The one letter code (E or S) located on the top left side of the addressee information and is used to identify the language preference of the applicant. While the two letter code found on the right side identifies the type of documents to include with the notification letter (for leveraging purposes).

For more information on mail codes, please submit a ticket to our [Support Desk](#).

**TEST AGENCY**  
135 AVIATION WAY, STE 7  
WATSONVILLE CA, 95076

**GLADYS MENDOZA**  
911 LAUREL DR  
SALINAS CA, 93906

Date: 3/29/2016

**You are eligible for the Home Energy Assistance Program (HEAP)!**

E

AT

#### 1.3. Recommendations

Use **Internet Explorer** or **Firefox** instead of Chrome to print notification letters.

Use **#10 Double-Window Envelopes** if mailing-out notification letters.

#### 1.4. Warning & Attention

If you use the *Daily Envelopes* or *Mailing Labels*, the Benefit and Denial Notification Letters **must** be printed **before** printing the envelopes/labels. Otherwise, envelopes/labels with benefited and denied mailing codes will generate instead of the Notification Letters.

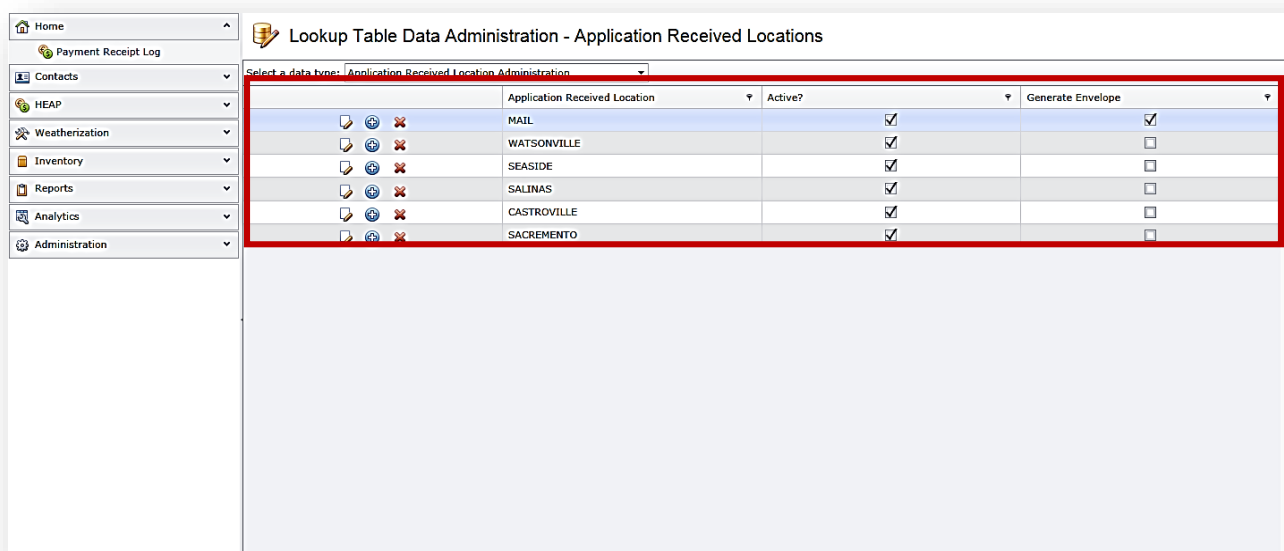
Notification letters are only available in English and Spanish. If you select a different language, the letter will generate in English.



















## 1.5. Troubleshooting

If Benefit Letters do not generate after being “Transferred” to CORE, check the *Intake Locations* are enabled. To check the Intake Locations go to:

**Important!** Agency administration permissions required.

1. **Administration** select **Data Administration** and click on **Application Received Location Administration** from the data type drop down list.
2. Click the pencil icon, and checkmark the **Generate Envelope** box. You may also edit or delete existing *Intake locations* if they’ve never been used.



	Application Received Location	Active?	Generate Envelope
  	MAIL	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
  	WATSONVILLE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
  	SEASIDE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
  	SALINAS	<input checked="" type="checkbox"/>	<input type="checkbox"/>
  	CASTROVILLE	<input checked="" type="checkbox"/>	<input type="checkbox"/>
  	SACRAMENTO	<input checked="" type="checkbox"/>	<input type="checkbox"/>

## 1.6. Additional Support

- [Support@ServTraq.com](mailto:Support@ServTraq.com)
- 831.761.1747

### 1.6.1. Support Portal

- <https://servtraq.freshdesk.com/support/solutions>