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.

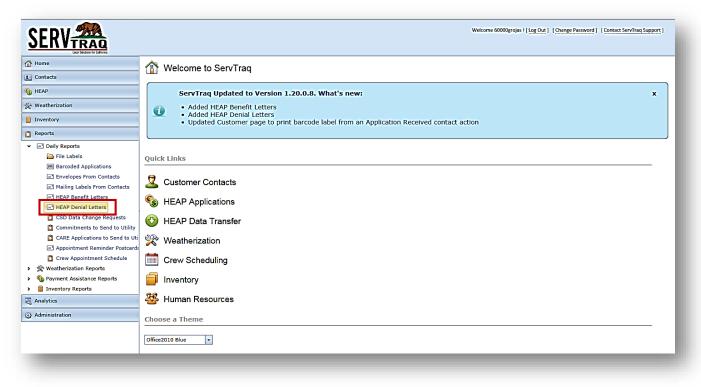
1.1. Procedure

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.

\\Fergana\ServTraq\Solutions\FeatureHighlight\NotificationLetters\Benefit&Denial_Lettersv_f.docx

- **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).

Denial Letters
C 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
TEST AGENCY
135 AVIATION WAY, STE 7
WATSONVILLE CA, 95076
JULIAN GARCIA 555 MAIN ST APT 1
WATSONVILLE CA, 95076

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.

1 Home	
	Denial Letters
1 Contacts	
S HEAP	Report Parameters
🔆 Weatherization	Start Date:* 3/24/2016
Inventory	End Date:* 3/24/2016
🖞 Reports	Printed?:
 ✓ = Daily Reports 	Return Address:* 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076
File Labels	Agency Phone Number:*
Barcoded Applications	Submit
Envelopes From Contacts	Message from webpage
Mailing Labels From Contacts	
= HEAP Benefit Letters	This will udpate all records in the report to a printed date of today.
HEAP Denial Letters	Continue?
CSD Data Change Requests	
Commitments to Send to Utility	TEST AGENCY OK Cancel
CARE Applications to Send to Uti	135 AVIATION WAY, STE 7
🖃 Appointment Reminder Postcards	WATSONVILLE CA, 95076
Crew Appointment Schedule	
> 🙊 Weatherization Reports	
> 🍪 Payment Assistance Reports	E DX
> 📋 Inventory Reports	JULIAN GARCIA
Analytics	555 MAIN ST APT 1
🚱 Administration	WATSONVILLE CA, 95076

- 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**

Print	- X-
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Page Setup	Page1 of 2

1.1.2. Benefit Notification Letter

To generate ServTraq[©] HEAP Benefit Letters, an (enabled) "Intake Location¹" 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.

SERV TRAG	Welcome 60000grages ([Log Out] [Change Password] [Consect Servirag In
Home	Welcome to ServTraq
) HEAP @ Wootherization Inventory Reports	ServTraq Updated to Version 1.20.0.8. What's new: • Added HEAP Denefit Letters • Added HEAP Denial Letters • Added HEAP Denial Letters • Updated Customer page to print barcode label from an Application Received contact action
Soliy Reports The Labds Bercodel Applications Bercodel Labora CAD Data Change Requests CAD Cata Change Requests CAD Cata Change Requests CAD Cata Change Requests Cate Applications to Send to Ubity CARE Applications to Send to Ubity CARE Applications to Send to Ubity Cate Applications to Ubity Cate Applications to Send to Ubity Cate Applications Cate Application Cate Applications Cate Applications Cate Applicatio	Quick Links Image: Customer Contacts Image: HEAP Applications Image: HEAP Data Transfer Image: Veatherization Image: Crew Scheduling Inventory Image: Human Resources

- 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.

¹ See section 1.5. for information on how to enable Intake Locations.

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

SERV 28		Welcome 60000grojas I [Log Dut] [Change Password] [Contact ServIraq Support]
Home Tontacts	HEAP Benefit Letters	
NEAP	- Report Parameters	
🙊 Weatherization	Start Date:* 3/29/2016 *	
Inventory	End Date:" 3/29/2016 *	
C Reports	Printed?: Return Address:* 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076	
E Daily Reports		
E File Labels	Agency Phone Number:* ()	
Barcoded Applications	Sub	mit
- Envelopes From Contacts		
Mailing Labels From Contacts		
HEAP Benefit Letters		^
HEAP Denial Letters		
CSD Data Change Requests	TEST AGENCY	
Commitments to Send to Utility	135 AVIATION WAY, STE 7	
CARE Applications to Send to Util	WATSONVILLE CA, 95076	
Appointment Reminder Postcards		
Crew Appointment Schedule		
 Weatherization Reports 		
Symmet Assistance Reports		
 Inventory Reports 	GLADYS MENDOZA 911 LAUREL DR	
analytics	SALINAS CA, 93906	
Administration		
1		•
811, 539px 1	1 1440 × 900 px	100% 🕞

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.

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Home	HEAP Benefit Letters
Contacts	
HEAP	(" Report Parameters
Weatherization	Start Date: " 3/29/2016 *
Inventory	End Date:" 3/29/2016 *
Reports	Printed7:
Daily Reports	Return Address:" 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076 •
File Labels	Agency Phone Numbers*
Barcoded Applications	Message from webpage
Envelopes From Contacts	
Mailing Labels From Contacts	Page 1 • o Online?
HEAP Benefit Letters	
HEAP Denial Letters	
CSD Data Change Requests	OK Cancel
CSD Data Change Requests	TEST AGENCY
-	135 AVIATION WAY, STE 7
CARE Applications to Send to Util	
Appointment Reminder Postcards	1 1
Crew Appointment Schedule	
Reports	E AY
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Inventory Reports	911 LAUREL DR
Analytics	SALINAS CA, 93906
Administration	
9	10 1437 × 870px

- 4. Change your printing settings to the following:
 - Print ALL pages
 - Fit Page Size

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

Copies: 1 🗧 Print in grayscale	
Save ink/toner Save in	Comments & Forms Document and Markups Scale: 96% 8.5 x 11 Inches
Size Poster Multiple Booklet ● Fit Actual size Shrink oversized pages Strink oversized pages ● Custom Scale 100 % % % ⑦ Choose paper source by PDF page size Print on both sides of paper % ⑦ Choose paper source by PDF page size Point on both sides of paper % ⑦ Auto portrait/landscape % ⑦ Portrait % ⑦ Landscape	<pre>Minimum and a second and a</pre>
Page Setup	Page1 of 1 Print Cancel

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.

Local Solutions for California		
Thome	HEAP Benefit Letters	
Contacts		
🚯 НЕАР	Report Parameters	
> Weatherization	Start Date:" 3/25/2016	
Inventory	End Date:* 3/25/2016 -	
	Printed?:	
Reports	Return Address:* 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076	
E Daily Reports	Agency Phone Number:* ()	
File Labels	Submit	
Barcoded Applications Envelopes From Contacts		
Mailing Labels From Contacts	🛷 😏 🖾 🖾 Page 🔹 of 1 D 🖾 📓 🔛 Pdf 🔹	
HEAP Benefit Letters		
HEAP Denial Letters	The report has no data for the parameters entered.	
CSD Data Change Requests		
Commitments to Send to Utility		
CARE Applications to Send to Uti		
Appointment Reminder Postcards		
Crew Appointment Schedule		
> 🔆 Weatherization Reports		
Source Reports		
> Inventory Reports		
表 Analytics		
Administration		
< >		
	gy Services, Inc.; ServTrag version 1.20.0.8	

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.

		Oprojas 1 [Log Dut] [Change Password] [Contact ServTrag Support]
ome v ontacts v EAP v	Welcome to ServTraq	
vestherization ×		
eporta v nalytics v dministration A	 HEAP Applications HEAP Data Transfer 	
User Management Agency Details Data Administration	Veatherization	
4 Human Resources	Inventory Human Resources	
	Choose a Theme	
	Office2010 Blue T	100% ()

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.

	aging-azureweb	sites.net/Ageno	yDetails.aspx									
Save 🖁 Sav	ve and Close	🙆 Exit	🕹 Refresh									
 Sections Agency Location 	ons		dit Agency De									
🖏 Contra 🟠 Counti		Agency	Details									
Progra			Name:	TEST AGENCY		60000						
💡 Utilitie				Agency Name		igency ID Code						
		Ag		(831) 761-7080]							
		Annon		Number (831) 761-7081	1							
		Agency		Number	1							
				(831) 728-0535]							
				Number								
		<u> </u>			-							
		<u> </u>	Use Benefit Calculations?:		Address Line1	Address Line2	City	State	Zip Code	Active	Default Address	Mailing Address
		<u> </u>	Use Benefit Calculations?: / Locations Display M		Address Line1 723 E LAKE AVE, STE, F	Address Line2	City WATSONVILLE	State CA	Zip Code 95076	Active	Default Address	Mailing Address
		Agency	Use Denefit Calculations?: / Locations Display M CENTRAL INC.	Name		Address Line2		_				-
		Agency	Use Benefit Calculations?: / Locations Display M & CENTRAL NC.	Name	723 E LAKE AVE. STE. F	Address Line2	WATSONVILLE	CA	95076			V
		Agency	Use Benefit Calculations?: / Locations / Display M CENTRAL X CENTRAL X CENTRAL X CENTRAL X CENTRAL X CENTRAL	Name L COAST ENERGY SERVICES, L COAST ENERGY SERVICES,	723 E LAKE AVE. STE. F 135 AVIATION WAY, STE 7	Address Line2	WATSONVILLE	са са са	95076 95076	N N	×	X
		Agency	Use Benefit Calculations?: / Locations Display M X CENTRAL INC. X CENTRAL INC.	Name L COAST ENERGY SERVICES, L COAST ENERGY SERVICES,	723 E LAKE AVE. STE. F 135 AVIATION WAY, STE 7 PO BOX 2707	Address Line2	WATSONVILLE WATSONVILLE WATSONVILLE	са са са	95076 95077 95077	×	N N	N N N
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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.

			Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
V	¢	×	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
6	Ð	×	3/28/2016	OUTGOING	PROGRAM/APPLICATION INFO	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 <u>Support Desk.</u>

35 AVIATION WAY, STE 7	
VATSONVILLE CA, 95076	
E AT	
GLADYS MENDOZA	
11 LAUREL DR GALINAS CA, 93906	
Date: 3/29/2016	
You are eligible for the Home Energy Assistance Program (HEAP)!	

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 & Attentions

If you use the *Daily Envelopes* or *Mailing Labels*, the Benefit and Denial Notification Letters <u>must</u> 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.

log Payment Receipt Log	1	LOOKup Tai		ministration - Application Rec			
1 Contacts		data type: Applic	ation Received Loc	ration Administration			
_				Application Received Location	Active?	9 Generate Enve	elope
🚱 HEAP	~	V G	×	MAIL			2
Neatherization	~			WATSONVILLE	N N		
Inventory	~			SEASIDE			
Reports	~	V 6		SALINAS	N		
analytics	~	V 🔂		CASTROVILLE	×		
Administration				SACREMENTO	V		

1.6. Additional Support

- <u>Support@ServTraq.com</u>
- 831.761.1747

1.6.1. Support Portal

https://servtraq.freshdesk.com/support/solutions

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