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.
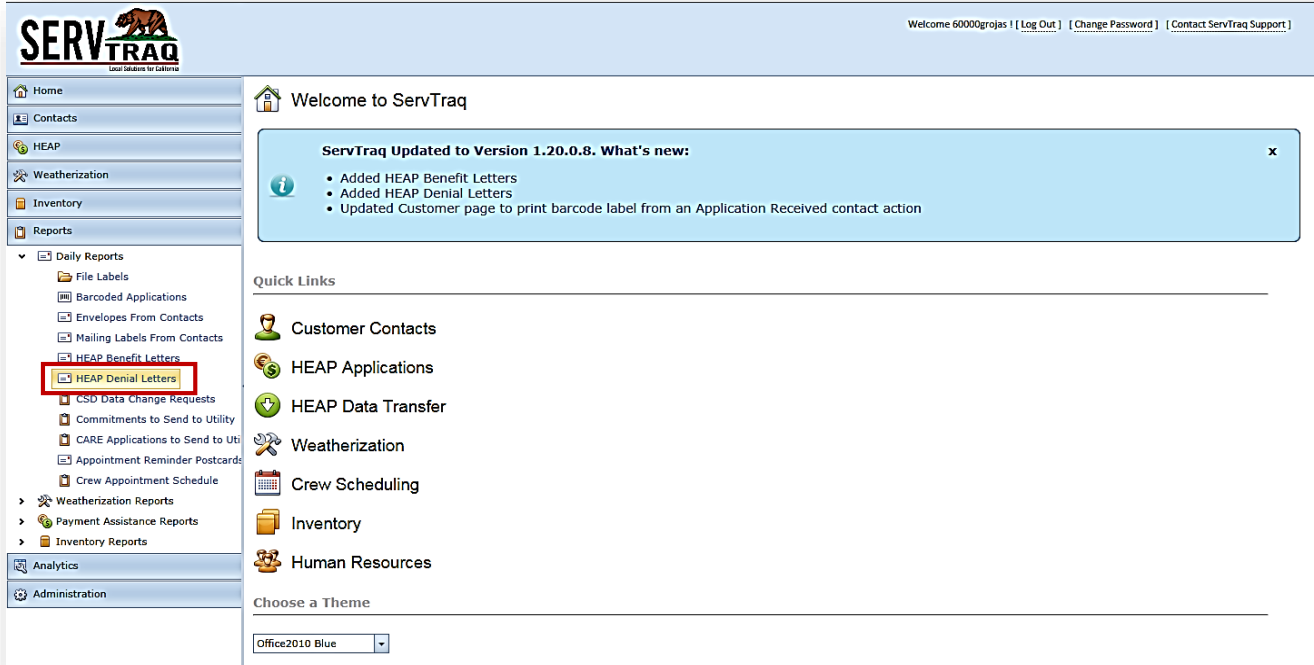
1.1. Procedure

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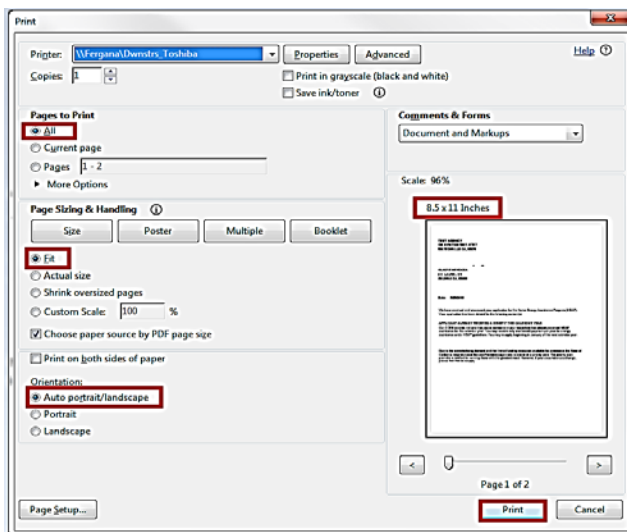c. Click **Submit** to apply the changes (if any).

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.
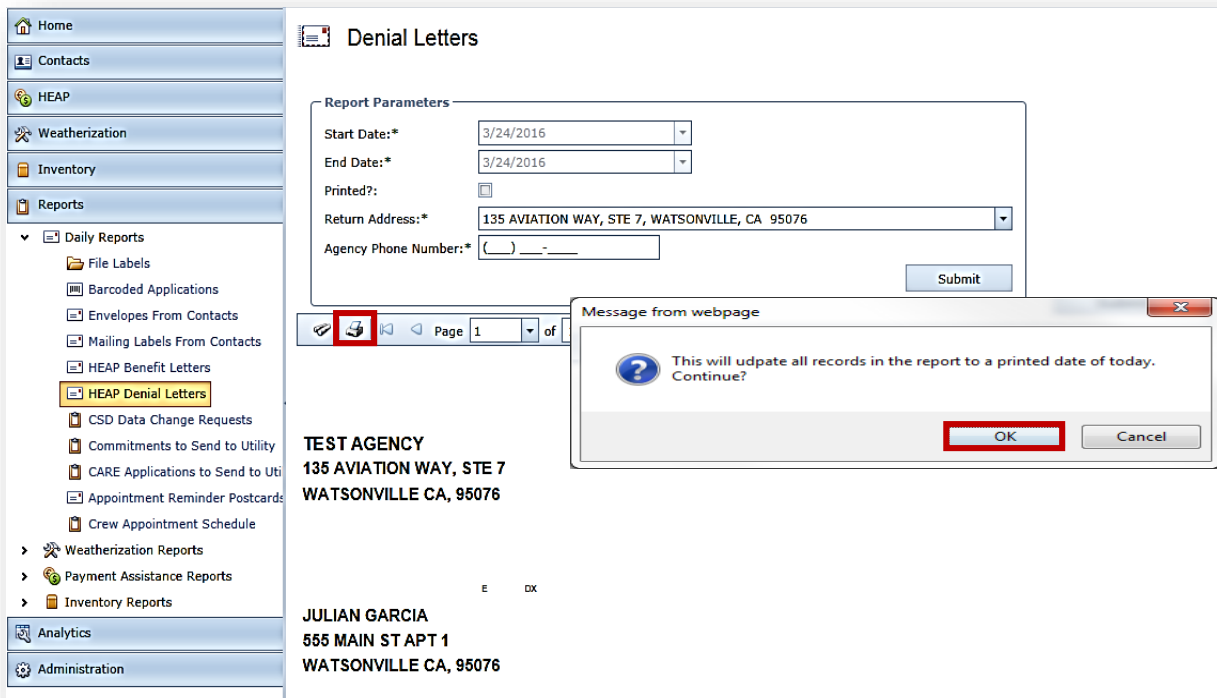
4. Change your printing settings to the following:
   - Print **ALL** pages
   - **Fit** Page Size
   - **Auto Portrait/Landscape**
   - Paper Size: **8.5 X 11Inches**
5. Finish by clicking **Print**

1.1.2. Benefit Notification Letter

To generate ServTraq© HEAP Benefit Letters, an (enabled) "Intake Location[1]" 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.
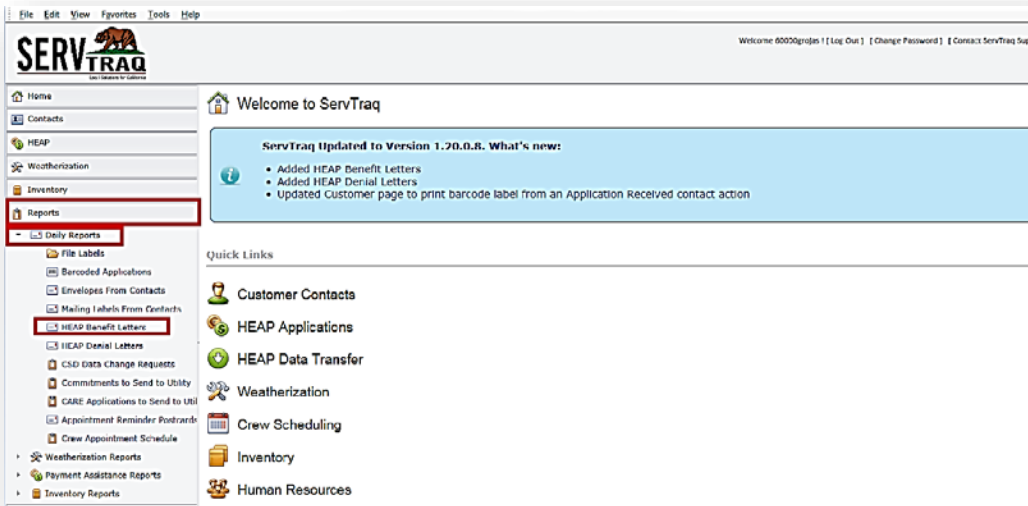
2. The report displays Benefit Letters, not printed. Only change the report parameters to reprint letters.
   a. If your agency has multiple "Agency Locations" you can change the default return address by clicking the "Return Address" drop down list.
        i. Note: To set "Agency Locations" see section 1.2.2.
   b. An agency phone number can also be added to the template by typing it in.

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[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).

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.

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

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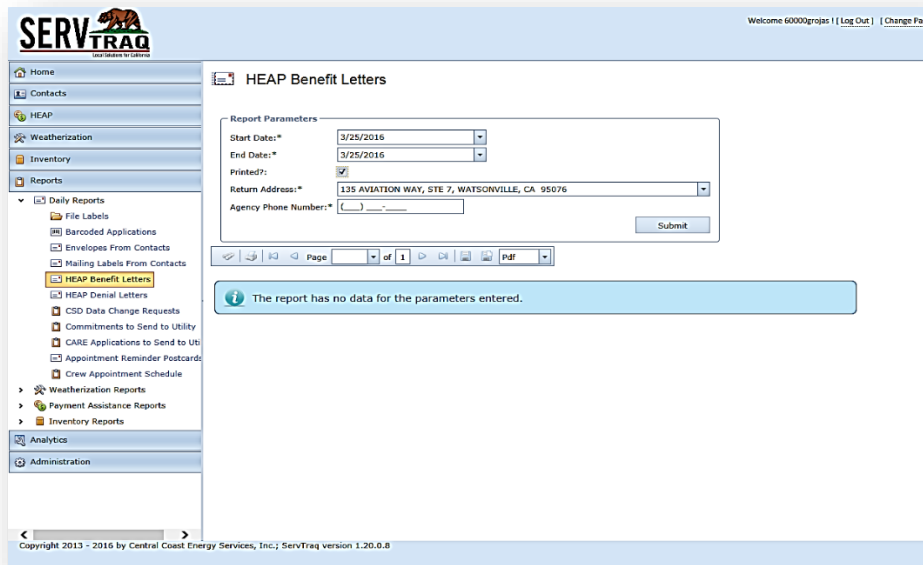
5. Finish by clicking **Print**.

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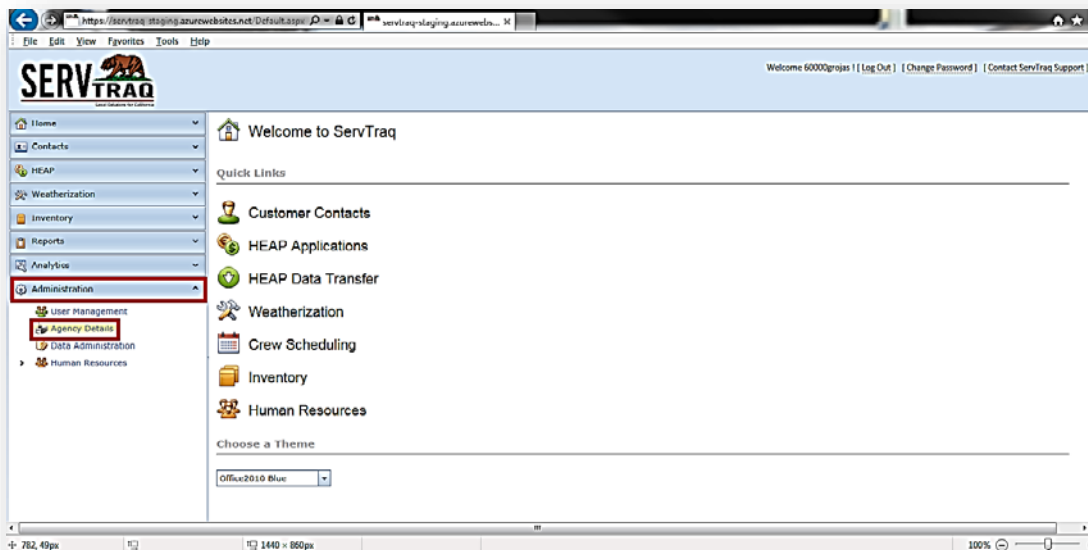
2. Under the Agency Locations, click the **addition** icon to add an Agency Location.

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.

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.

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.

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 **must** be printed **before** printing the envelopes/labels. Otherwise, envelopes/labels with benefited and denied mailing codes will generate instead of the Notification Letters.
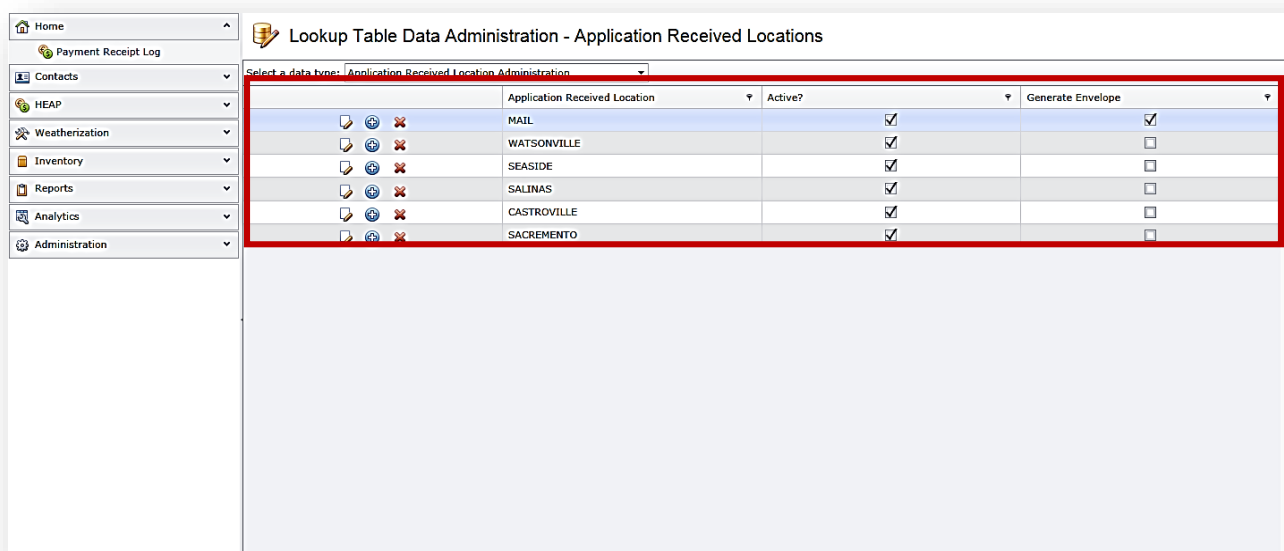
Notification letters are only available in English and Spanish. If you select a different language, the letter will generate in English.

## 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.

1.6. Additional Support

- Support@ServTraq.com
- 831.761.1747

1.6.1. Support Portal

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