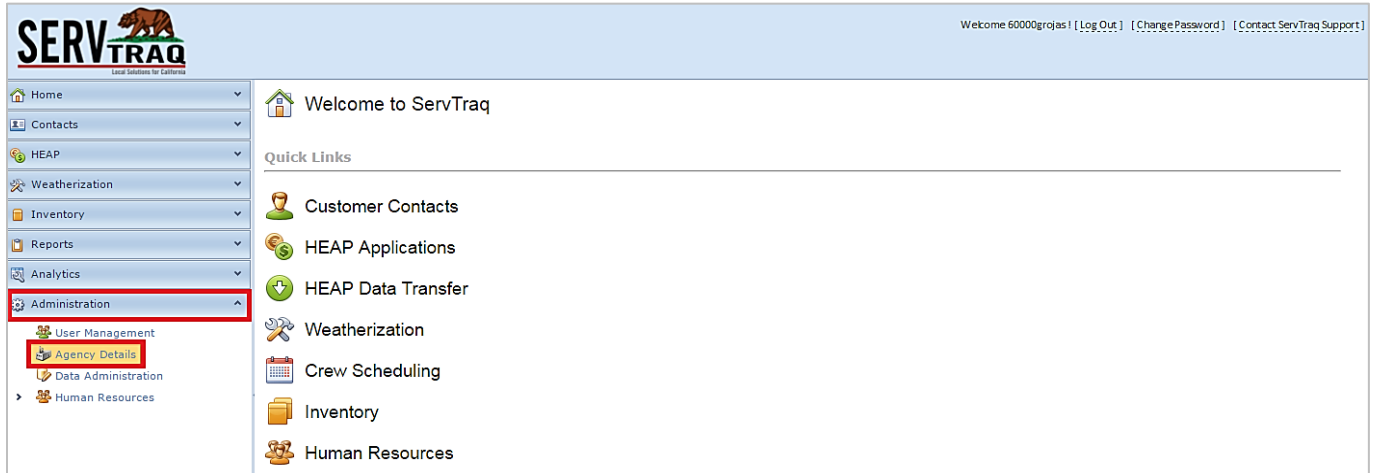


Updating/Adding a Priority Plan

Background: At the turn of a new program year, ServTraq applies the last priority plan entry to the new contract. If changes have been made to your priority plan from last year's you'll need to update ServTraq. This feature can also be used to check for inconsistencies regarding your priority plan.

Requirement: Have a copy of the most current Agency Priority Plan.

To update information click on the **Administration** tab>**Agency Details**



SERVTRAQ
Local Solutions for California

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

Home | Contacts | HEAP | Weatherization | Inventory | Reports | Analytics | **Administration**

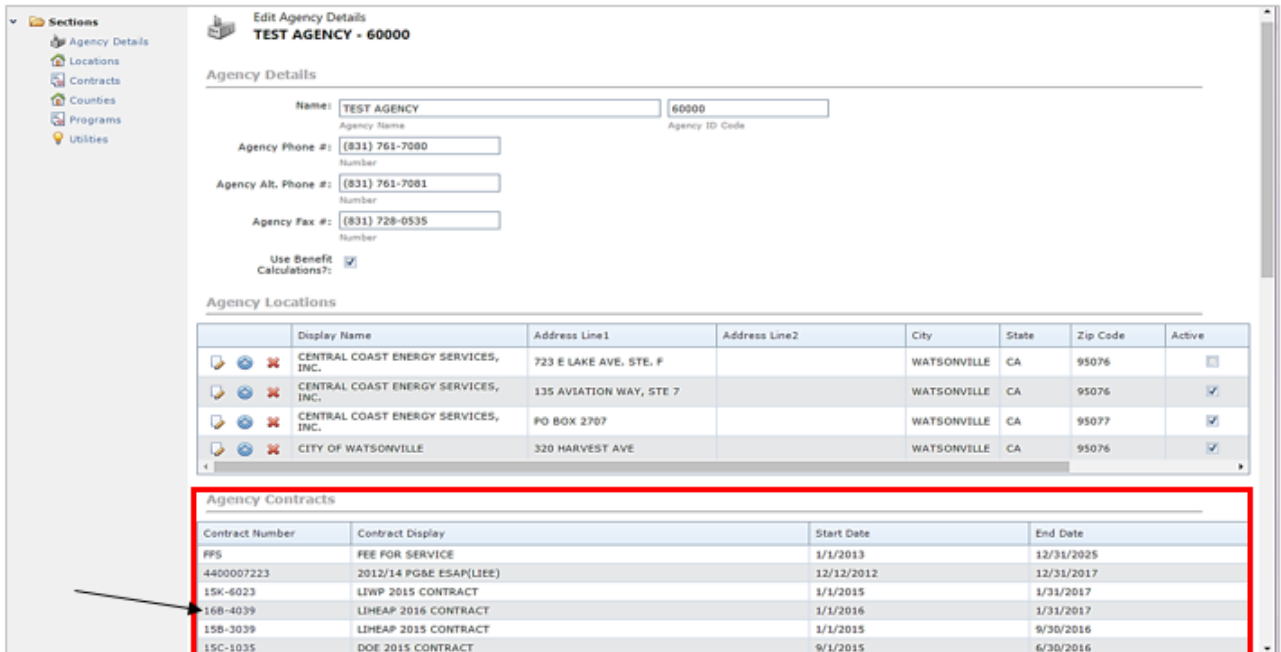
User Management | **Agency Details** | Data Administration | Human Resources

Welcome to ServTraq

Quick Links

- Customer Contacts
- HEAP Applications
- HEAP Data Transfer
- Weatherization
- Crew Scheduling
- Inventory
- Human Resources

Scroll down to **Agency Contracts** and select the contract to update by clicking on the **Contract Number**.



Edit Agency Details
TEST AGENCY - 60000

Agency Details

Name: TEST AGENCY Agency ID Code: 60000

Agency Phone #: (831) 761-7080 Number

Agency Alt. Phone #: (831) 761-7081 Number

Agency Fax #: (831) 728-0535 Number

Use Benefit Calculations?: ☒

Agency Locations















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

Agency Contracts

Contract Number	Contract Display	Start Date	End Date
FP5	FEE FOR SERVICE	1/1/2013	12/31/2025
4400007223	2012/14 PG&E ESAP(LIIE)	12/12/2012	12/31/2017
15K-6023	LIWP 2015 CONTRACT	1/1/2015	1/31/2017
16B-4039	LIHEAP 2016 CONTRACT	1/1/2016	1/31/2017
15B-3039	LIHEAP 2015 CONTRACT	1/1/2015	9/30/2016
15C-1035	DOE 2015 CONTRACT	9/1/2015	6/30/2016

Updating/Adding a Priority Plan


















Update the information for each **Subprogram** by clicking on the *pencil* icon to make updates.

Subprograms					
	Display Name	Allocation	Program Year	Active	
 	ECCS 2016	\$0.00	2016	<input checked="" type="checkbox"/>	
 	ECHS 2016	\$0.00	2016	<input checked="" type="checkbox"/>	
 	FAST TRACK 2016	\$0.00	2016	<input checked="" type="checkbox"/>	
 	HEAP 2016	\$0.00	2016	<input checked="" type="checkbox"/>	
 	SWEATS 2016	\$0.00	2016	<input checked="" type="checkbox"/>	
 	WPO ECIP 2016	\$0.00	2016	<input checked="" type="checkbox"/>	
 	WPO HEAP 2016	\$0.00	2016	<input checked="" type="checkbox"/>	

Example: HEAP 2016

Demographics Section:

Click on the *addition* icon to add a new record, or click the *pencil* icon to update the existing entry>Select a **Demographic Item** from the dropdown list> enter the number of **Priority Points** to be given>enter a **Category Name** to be displayed> click the *floppy disc* icon to **save** changes.

Demographics			
	Demographic Item	Priority Points	Display
Demographic Item*: <input type="text"/> PriorityPoints*: <input type="text"/> Display: <input type="text"/>			
 			
  	ELDERLY (60 YEARS +)	10	
  	DISABLED	10	
  	2 YEARS OR UNDER	10	
  	3 YEARS THROUGH 5 YEARS	10	
  	AD1	2	MEDICALLY NEEDY

Recommendation! Keep Agency-Defined priority point's (AD1-AD4) categories to the main 4 categories (1. Medical Needy, 2. Frail Elderly, 3. Severe Financial Hardship, 4. Hard to Reach) used by CSD. If you need to deduct points utilize the *priority point offset* feature when data entering an application.

Energy Burden Section:

Energy Burden ranges need to be entered in decimal format, with a 4-digit numbers after the decimal point. (Ex: 0.0499 = 4.99% or 0.1500 = 15.00%)



Note: When entering Energy Burden ranges make sure to account for all decimal percentages from 0.00% to 150.00%.

The following is the recommended entry:





- 0%-4.99%
- 5%-6.99%
- 7%-11.99%
- 12%-150%

Updating/Adding a Priority Plan

Click on the *addition* icon to add a new record, or click the *pencil* icon to update the existing entry.

Energy Burden				
	EB Range Min	EB Range Max	Priority Points	
		0.00 %	4.99 %	2
	5.00 %	9.99 %		4





Enter the *EB Range Minimum*, *EB Range Max* and the *Priority Points* and click the *floppy disc* to **save**.

Energy Burden				
	EB Range Min	EB Range Max	Priority Points	
EB Range Min*:	10.00 %			
EB Range Max*:				
Priority Points*:				
 				
		0.00 %	4.99 %	2
	5.00 %	9.99 %		4






Poverty Groups Section:

Priority Points need to be added to Poverty Groups according to Priority Plan.

Click on the *addition* icon to add a new record, or click the *pencil* icon to update the existing entry.

Poverty Group		
	Poverty Group	Priority Points
		1
		2
		3
		4

Update information and click the *floppy disc* icon to **save**.

Poverty Group	
	Priority Points
Poverty Group*:	1
Priority Points*:	11
 	
	2
	3
	4