

# **MARKETING & OUTREACH**

**SERVTRAQ WEBINAR 10.26.16**

# GOAL

Learn how to optimize ServTraq solutions to facilitate Marketing & Outreach efforts and generate leads with prospective applicants for:

- LIHEAP Payment Assistance
- LIHEAP Weatherization
- LIWP Weatherization
- LIHEAP TRP

*All outlined features allow users to export the working list for Marketing and Outreach purposes. Users can also use the Contact Entry feature to track Outreach efforts or generate mail-out envelopes or labels.*

**LINEAR –  
PAYMENT  
ASSISTANCE**

## Payment Assistance Marketing and Outreach Flyer Example

### YOU MAY BE ELIGIBLE FOR A CREDIT ON YOUR PG&E BILL OF UP TO **\$307!**

Send your HEAP application with the following:

- ✓ Copy of most recent PG&E Bill (ALL PAGES)
- ✓ Copy of Income documents for the last 30 days

*Our program is offered free of cost for low-income homeowners and renters, including those who occupy mobile homes.*



### USTED PODRIA RECIBIR UN CREDITO EN SU CUENTA DE PG&E DE HASTA **\$307!**

Porfavor envie su aplicación de HEAP con lo siguiente:

- ✓ Copia de su factura de PG&E mas reciente (TODAS PAGINAS)
- ✓ Copias de sus Ingresos en los últimos 30 dias

*Nuestro programa es ofrecido gratis a dueños e inquilinos de bajos ingresos, incluyendo los que ocupan casas móviles.*

Income Guidelines: # of people in household : maximum monthly income

Guías de Ingreso: # de personas en la vivienda : ingreso mensual máximo

1: \$2,004 | 2: \$2,621 | 3: \$3,238 | 4: \$3,855 | 5: \$4,472 | 6: \$5,089 | 7: \$5,204 | 8: \$5,320

→ MAIL APPLICATION TO / ENVIE APLICACION A: P.O. BOX 2707 WATSONVILLE, CA 95077 ←

# 1-888-728-3637



Central Coast Energy Services is a nonprofit 501 (c)(3) organization serving Santa Cruz, Monterey, San Benito, and San Mateo Counties

# UA Marketing from Weatherized Dwellings

The **UA Marketing from Weatherized Dwellings** feature allows users to view a list of open weatherization jobs within the *last 180 days*, linked to customers that have not been benefited for payment assistance under the current program year.

The screenshot shows the SERV TRAQ web application interface. The header includes the SERV TRAQ logo (Local Solutions for California) and a user greeting: "Welcome 60407JBasra ! [ Log Out ]". The left navigation menu is expanded to show "Weatherization" and "UA Marketing from Weatherization". The main content area is titled "UA Marketing from Weatherized Dwellings" and contains a "Refresh List" button, an "Export List" dropdown, and a table of job listings. The table has columns for Dwelling ID, Name, Best Time to Call, Phone, Mailing Address, and Mail City. There are four rows of data in the table.

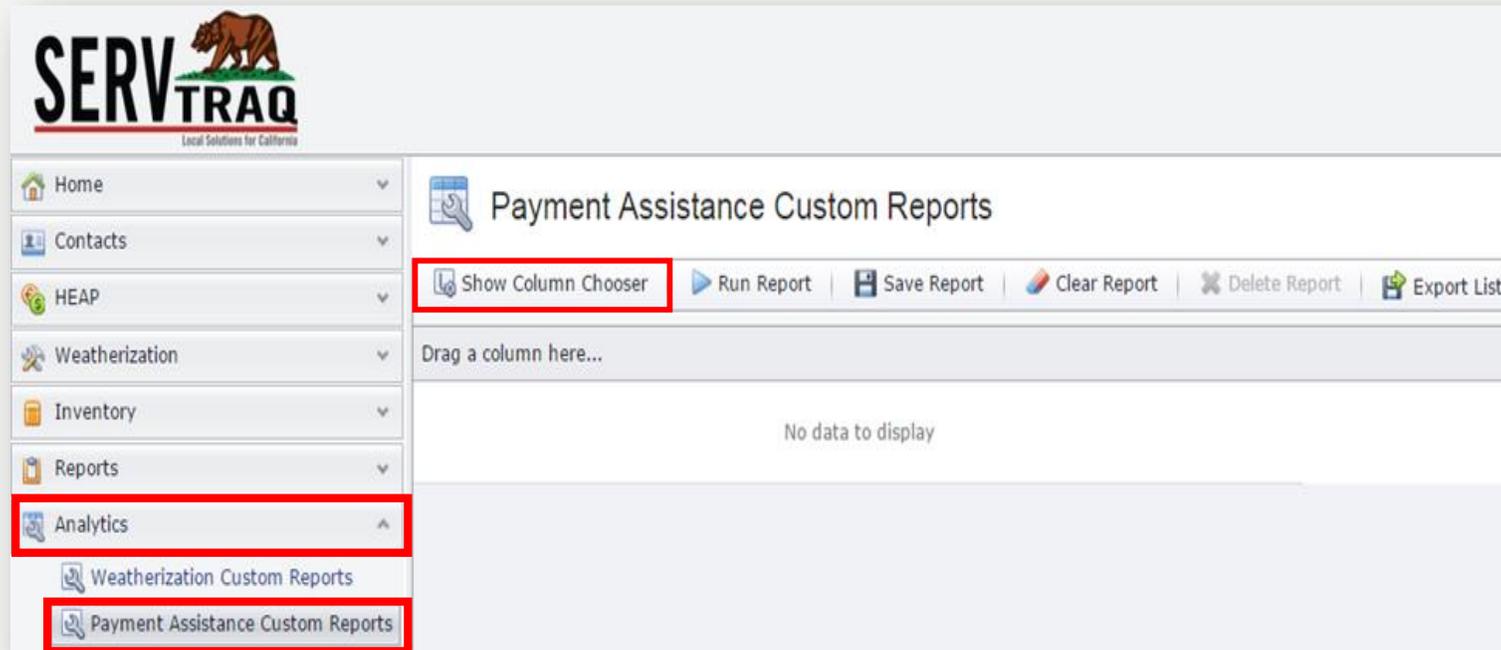
Dwelling ID	Name	Best Time to Call	Phone	Mailing Address	Mail City
7048	JANICE SMITH	MORN	831 7284096	2030 PAJARO LN APT 1301	FREEDOM
8248	ABEL RUIZ	MORN	831 7941538	10701 DAVIS ST	CASTROVILLE
8359	LEONEL GARCIA SANCHEZ	MORN	831 7615840	PO BOX 537	FREEDOM
8479	MARIA HERNANDEZ		831 8548814	2030 PAJARO LN APT 3105	FREEDOM

Go to: Weatherization> UA Marketing from Weatherization Jobs Completed

*A record is automatically removed from the list when a utility assistance application is added to the customer record.*

# Custom Reports

Payment Assistant **Custom Reports** allow user to create *specific* report using the output fields and filters available. You can use this report to generate a list of customers benefitted under one program year and not the other. Example: Benefitted under PY 2015, and not PY 2016.



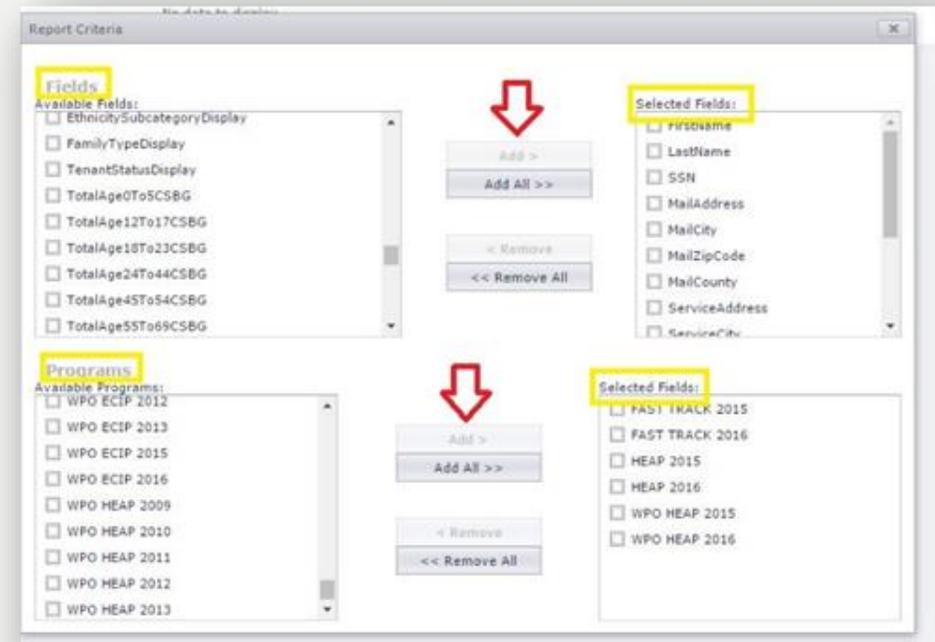
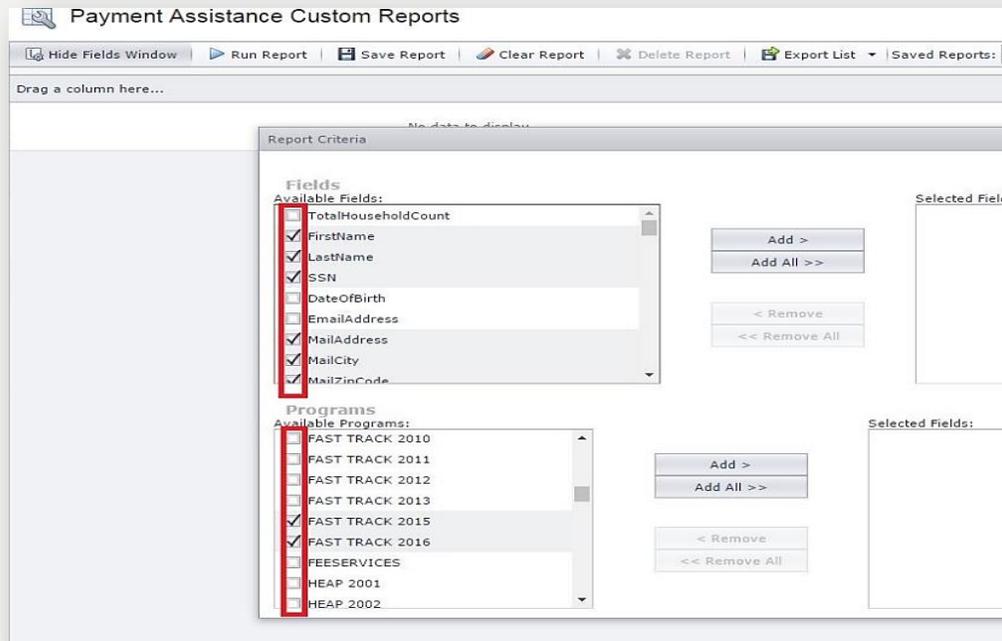
Go to: Analytics> Payment Assistance Custom Reports> Click on “Show Column Chooser”

For this specific report a written procedure can be found here:

<https://servtraq.freshdesk.com/solution/articles/4000088835-custom-reporting-those-benefitted-last-year-but-not-this-year>

# Step I: Select Report Criteria

In the report criteria select as many output fields from the “available fields” & “available programs” needed and click **add**, then click the “**X**” in the upper right corner to close.



## Step 2: Extract Data from ServTraq

Click the “**Run Report**” button to extract the data.

Export to Excel and Apply Sorting and Duplicate filters

*Optional step:* We advise to save the custom report just in case ServTraq times out or doesn't export properly. To save click on the “**Save Report**” button on the ribbon.

The screenshot displays the ServTraq web application interface. The left sidebar contains a navigation menu with items like Home, Contacts, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. The main content area is titled 'Payment Assistance Custom Reports' and features a ribbon with several buttons: 'Show Column Chooser', 'Run Report', 'Save Report', 'Clear Report', 'Delete Report', and 'Export List'. The 'Run Report', 'Save Report', and 'Export List' buttons are highlighted with red boxes. Below the ribbon is a table with the following data:

MailCity	MailZipCode	MailCounty	ServiceAddress	FirstNa
SALINAS	93906	MONTEREY	622 CALAVERAS DR	ALFON
SALINAS	93907	MONTEREY	350 CASENTINI ST APT 49	ANGEL
POMONA	91767	LOS ANGELES	3082 SHASTA ST APT 3	ANNET
SACRAMENTO	95814	SACRAMENTO	1318 E ST	BARBA
WATSONVILLE	95076	SANTA CRUZ	174 ANNA ST	DELFI
WATSONVILLE	95076	SANTA CRUZ	614 PALM AVE	GLADY
WATSONVILLE	95076	SANTA CRUZ	614 PALM AVE	GLADY
SALINAS	93901	MONTEREY	123 S MAIN ST	GLADY
SALINAS	93901	MONTEREY	123 S MAIN ST	GLADY
SALINAS	93905	MONTEREY	1455 LAUREL DR	GLADY
SALINAS	93906	MONTEREY	13484 PIERCE ST	GLADY



**LINEAR  
WEATHERIZATION**

## Weatherization Marketing and Outreach Flyer Example

# Is your House or Apartment **COLD** in the Winter & **HOT** in the Summer?

Apply Today for **FREE** Home Weatherization Services!

The **FREE** Home Weatherization program provides an energy and safety assessment with installation of energy conservation measures that improve living conditions and reduce energy costs of low-income households. Home Weatherization services may include:

- ✓ Windows
- ✓ Doors
- ✓ Water Heater
- ✓ Attic & Floor Insulation
- ✓ Thermostat
- ✓ Carbon Monoxide Alarm
- ✓ Furnace
- ✓ Porch Lamps

**& much more!**

East Palo Alto resident, Mr. Abram submitted his application & received:

- ✓ 2 Dual Pane Windows
- ✓ Door
- ✓ 4 Smoke Alarms
- ✓ Programmable Thermostat
- ✓ Carbon Monoxide Alarm
- ✓ Microwave
- ✓ Hand Held Showerhead
- ✓ Hot Water Faucet Restrictors
- ✓ Torchiere Lamp
- ✓ Water heater repairs

Mr. Abram said:

*"I heard about Central Coast Energy Services from my neighbor across the street who was also having his home weatherized. The **FREE** weatherization program will help me conserve energy and water and save me money with all the upgrades. This will make my life easier - I will have extra money in my pocket to help me get by. It is easy to apply. I would recommend this program to family, friends & neighbors!"*



Weatherization work being completed on Mr. Abram's East Palo Alto home in July 2015

**You may also be eligible for a credit of up to \$306 on your PG&E bill!**

Submit the enclosed forms with copies of: ✓ **PG&E BILL:** All pages of your most recent PG&E bill  
 ✓ **INCOME:** Income documents for the last 30 days for all adults in the household

Gross monthly income cannot exceed the amount listed below:

1 person	2 persons	3 persons	4 persons	5 persons	6 persons	7 persons
\$1,996	\$2,611	\$3,225	\$3,840	\$4,454	\$5,069	\$5,184

# 1-888-728-3637



Central Coast Energy Services, Inc. is a 501(c) (3) not-for-profit organization and the service provider for the Home Energy Assistance Program (HEAP), the Home Weatherization Program, and PG&E CARE for low-income households in Santa Cruz, San Benito, Monterey, and San Mateo Counties. For more information visit: [www.EnergyServices.org](http://www.EnergyServices.org)

# WX Marketing

The **Weatherization Marketing** feature allows users to view a list of eligible payment assistance customers (for the current program year) not previously weatherized by your agency.

Local Solutions for California

Welcome 604071Basra ! [ Log Out ]

Weatherization Marketing

Refresh List | Export List

Drag a column header here to group by that column

Days	Intake Date	LIWP Census Tract Eligible	Name	Phone	Mailing Address	Mail City
85	07/22/2015	!	AMY POWELL	831 7943025	1598 HUGHES WAY	SALINAS
85	07/22/2015	!	ARTURO LOSOYA	831 7554561	1624 EL DORADO DR	SALINAS
85	07/22/2015	!	COURTNEY TOVAR	415 6358631	2161 WHITMAN WAY APT 5	SAN BRUNO

Go to: Weatherization > Weatherization Marketing

*A record is automatically removed from the list if:*

- ✓ A weatherization job for the dwelling address is added
- ✓ No action was taken after the 86<sup>th</sup> day on the list

Performance Measurements ▲

Main Heating Fuel\*:

Secondary Heating Fuel(s):  ELECTRIC  KEROSENE  OTHER  WOOD  
 FUEL OIL  NATURAL GAS  PROPANE

Does a Member of Household Receive CalFresh?

Was a WSAG/POW Submitted with the Application?



This feature is contingent on the “**WSAG/POW submitted?**” checkbox located in the UA data entry module.

If the “**WSAG/POW submitted?**” checkbox is marked, it implies that a Weatherization Service Agreement or Property Owner Waiver (WSAG/POW) was submitted with an Intake Application and will be excluded from the Marketing List.

The logo features the acronym "LIWP" in a bold, black, sans-serif font, centered within a white, scalloped-edged circular shape. This white shape is set against a solid yellow background. A dark brown vertical bar is visible on the far left edge of the image.

**LIWP**

**LOW-INCOME WEATHERIZATION PROGRAM**

# WX Marketing “LIWP Eligible” filter Enabled

The **WX Marketing “LIWP Eligible”** filter feature will generate a list of eligible payment assistance customers not previously weatherized by your agency where the dwelling address was not found in the database and falls within an eligible DAC zone.



The screenshot displays the SERV TRAQ interface for Weatherization Marketing. The left sidebar shows the navigation menu with 'Weatherization Marketing' selected. The main content area shows a table with the following data:

Days	Intake Date	LIWP Census Tract Eligible	Name
78	07/27/2016	✓	
78	07/27/2016	✓	
76	07/29/2016	✓	
66	08/08/2016	✓	
59	08/15/2016	✓	
59	08/15/2016	✓	
55	08/19/2016	✓	
51	08/23/2016	✓	IRENE HERNANDEZ
51	08/23/2016	✓	STELLA WALKER
50	08/24/2016	✓	MARTHA HEREDIA GUZMAN

A dropdown menu is open over the 'LIWP Census Tract Eligible' column, showing the following options:

- (Select All)
- LIWP Census Tract Eligible
- LIWP Census Tract Ineligible
- LIWP Census Tract Unknown

The 'LIWP Census Tract Eligible' option is selected, and a yellow arrow points to it from the right.

Go to: Weatherization > Weatherization Marketing > click the LIWP Census Tract Eligible filter

# LIWP Census Tract “Unknown” option

The LIWP Census Tract “Unknown” option will generate a list of ***potential*** eligible payment assistance customers where applications were data entered and US Census Tract Number was not retrieved during Payment Assistance Application Entry.

**Weatherization Marketing**

Refresh List | Export List

Drag a column header here to group by that column

Days	Intake Date	LIWP Census Tract Eligible	Name
84	07/21/2016	!	
84	07/21/2016	!	
84	07/21/2016	!	
84	07/21/2016		
84	07/21/2016	!	
84	07/21/2016	!	
84	07/21/2016	!	
84	07/21/2016	!	

- (Select All)
- LIWP Census Tract Eligible
- LIWP Census Tract Ineligible
- LIWP Census Tract Unknown

OK Cancel

PAMELA MAPP

## We Recommend

To avoid this issue from occurring we recommend clicking on the *US Census Tract* magnifying glass icon for every Utility Assistance application data entered on ServTraq..

POS/Physical Address

Line 1:

Address #\* Address Street\* Street Type

Line 2:

Building Type Unit Number

Line 3:

Zip Code\* City\* County\* State\*

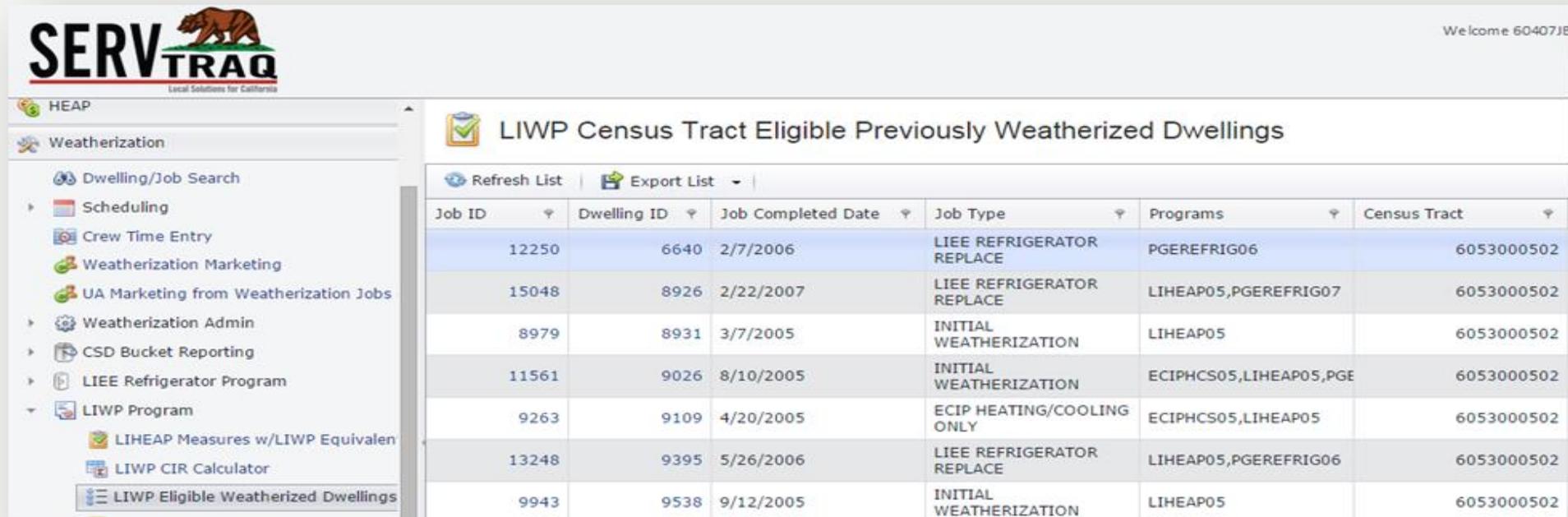
US Census Tract:

Place of Service Address is a duplicate for the program year

Has the customer lived at this Address for the past 12 months?

# LIWP Eligible Weatherized Dwellings

The **LIWP Eligible Weatherized Dwelling** list previously weatherized dwellings under the LIHEAP or other agency contracts that fall within an eligible DAC zone.



The screenshot shows the SERV TRAQ web application interface. The top left features the SERV TRAQ logo with a bear icon and the tagline "Local Solutions for California". The top right displays the user name "Welcome 60407JB". The left sidebar contains a navigation menu under the "HEAP" header, with "Weatherization" expanded to show options like "Dwelling/Job Search", "Scheduling", "Crew Time Entry", "Weatherization Marketing", "UA Marketing from Weatherization Jobs", "Weatherization Admin", "CSD Bucket Reporting", "LIEE Refrigerator Program", and "LIWP Program". The "LIWP Program" is selected, and "LIWP Eligible Weatherized Dwellings" is highlighted. The main content area is titled "LIWP Census Tract Eligible Previously Weatherized Dwellings" and includes "Refresh List" and "Export List" buttons. Below is a table with the following data:

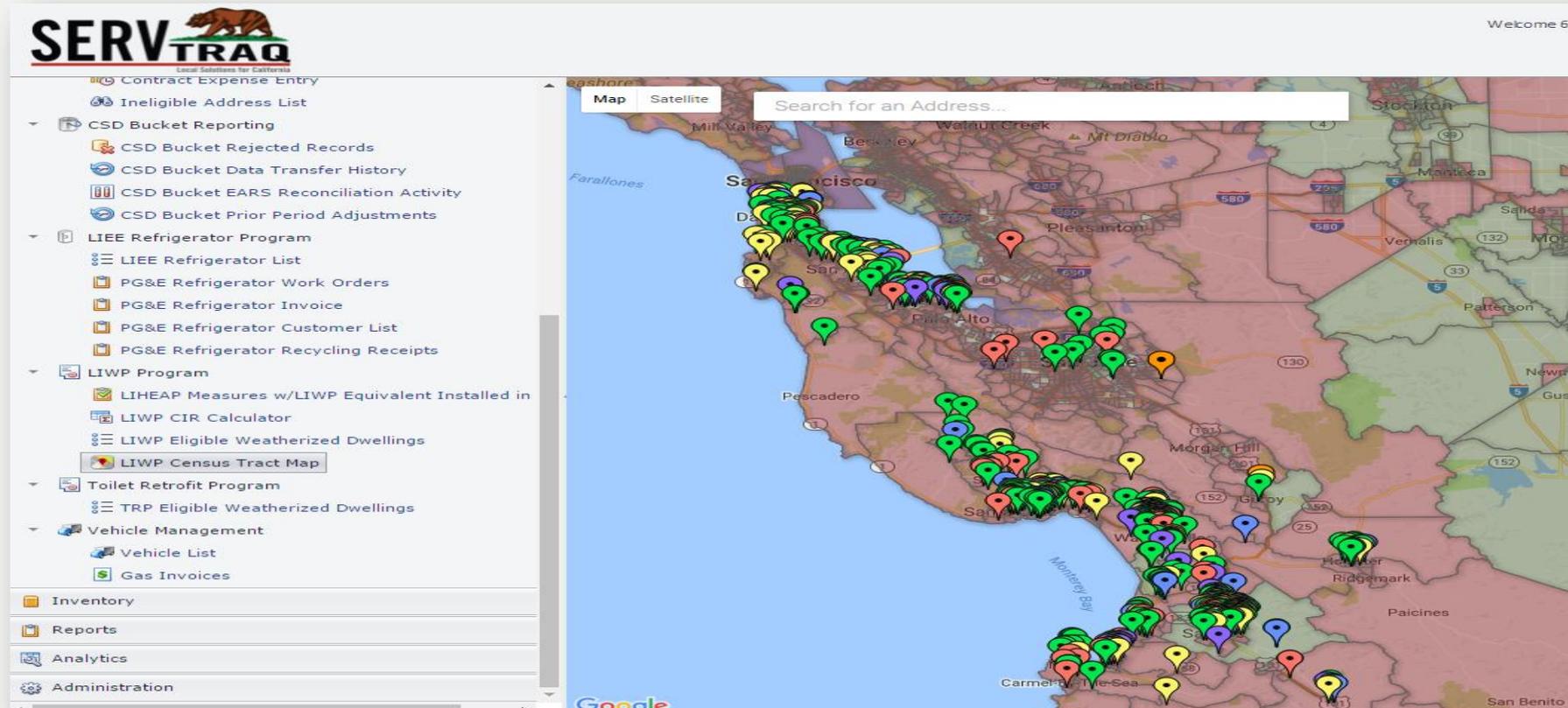
Job ID	Dwelling ID	Job Completed Date	Job Type	Programs	Census Tract
12250	6640	2/7/2006	LIEE REFRIGERATOR REPLACE	PGEREFRIG06	6053000502
15048	8926	2/22/2007	LIEE REFRIGERATOR REPLACE	LIHEAP05,PGEREFRIG07	6053000502
8979	8931	3/7/2005	INITIAL WEATHERIZATION	LIHEAP05	6053000502
11561	9026	8/10/2005	INITIAL WEATHERIZATION	ECIPHCS05,LIHEAP05,PGE	6053000502
9263	9109	4/20/2005	ECIP HEATING/COOLING ONLY	ECIPHCS05,LIHEAP05	6053000502
13248	9395	5/26/2006	LIEE REFRIGERATOR REPLACE	LIHEAP05,PGEREFRIG06	6053000502
9943	9538	9/12/2005	INITIAL WEATHERIZATION	LIHEAP05	6053000502

Go to: Weatherization> LIWP Program> LIWP Eligible Weatherized Dwellings

A record is automatically removed from the list if a weatherization job for the dwelling address is added.

# LIWP Census Tract Map

The LIWP Census Tract Map shows current open weatherization dwellings jobs within your service areas. You also have the option to search by address to identify if it falls in a DAC zone.



Go to: Weatherization > LIWP Program > LIWP Census Tract Map



**TRP**

**TOILET REPLACEMENT PROGRAM**

## TRP Marketing and Outreach Flyer Example

# is your toilet **LOW-FLOW?** if it's **NOT** low-flow - we'll replace it **FREE** of cost! **Check and Call Us Today!**

### How to determine if your toilet is low-flow:

Toilets built before 1982 use **5-7 gallons** per flush. Toilets built 1994 & onward use **1.6 gallons** of water.

- ☒ Check for a flush volume stamp between the seat and tank. If the stamp reads "1.6 Gpf / 6.0 Lpf" your toilet is already low-flow model and is **NOT** eligible for replacement.
- ☒ Take the lid off and check for a flush volume stamp or a date stamp inside the tank. The stamp may be on the walls of the tank or on the lid itself.
  - ✓ If the flush volume stamp reads "1.6 Gpf / 6.0 Lpf" or the date stamp is later than 1994, your toilet is already a low-flow model and is **NOT** eligible for replacement.
  - ✓ If the date stamp is before 1994 your toilet is most likely a high-volume model and **IS** eligible for replacement.
- ☒ Helpful YouTube videos to help you determine if your toilet is low flow:  
<https://www.youtube.com/watch?v=UZOUtnGolRs>  
<https://www.youtube.com/watch?v=4urDALzVmwU>



*Helpful Hint:* Homes built after January 1994, will likely already have a low-flow toilet installed – and will **NOT** be eligible for the program

Low-Flow Toilet		Water sense 1.28 gallon toilets have an additional water supply hole	Low-Flow Toilet		Low-flow toilets have larger flush Valves
Regular Toilet			Regular Toilet		

Check your Toilet and Call Us Today!

# (831) 761-7689



# TRP Geographically Eligible Previously Weatherized Dwellings

The **TRP Geographically Eligible Previously Weatherized Dwellings** option provides a list of previously weatherized dwellings that fall within an eligible DAC zone.

The screenshot shows the SERV TRAQ web application interface. The left sidebar contains a navigation menu with the following items:

- Weatherization
  - Dwelling/Job Search
  - Scheduling
    - Open Jobs List
    - Appointment Schedule
    - Crew Time Entry
    - Weatherization Marketing
    - UA Marketing from Weatherization Jobs Completed
  - Weatherization Admin
    - Job Reporting
    - Unreport Jobs
    - Performance Measure Checklist
    - Contract Expense Entry
    - Ineligible Address List
  - CSD Bucket Reporting
    - CSD Bucket Rejected Records
    - CSD Bucket Data Transfer History
    - CSD Bucket EARS Reconciliation Activity
    - CSD Bucket Prior Period Adjustments
  - LIEE Refrigerator Program
    - LIEE Refrigerator List
    - PG&E Refrigerator Work Orders
    - PG&E Refrigerator Invoice
    - PG&E Refrigerator Customer List
    - PG&E Refrigerator Recycling Receipts
  - LIWP Program
    - LIHEAP Measures w/LIWP Equivalent Installed
    - LIWP CIR Calculator
    - LIWP Eligible Weatherized Dwellings
    - LIWP Census Tract Map
    - Toilet Retrofit Program
      - TRP Eligible Weatherized Dwellings

Job ID	Dwelling ID	Job Completed Date	Job Type	Programs	Census Tract	Percentile
40492	35576	6/8/2015	PRIVATE CONTRACTING	FEE FOR SERVICE	6047001801	16-20
40897	17981	11/30/2015	ECIP HEATING/COOLING ONLY	ARRA DOE WX 2009/11,ECHS 2015,LIHEAP WX 2015	6053000101	46-50
30131	21482	1/18/2012	ASSESS/DIAGNOSTIC ONLY	ARRA DOE WX 2009/11	6053000101	46-50
41493	39065	8/31/2016	INITIAL WEATHERIZATION	LIHEAP WX 2016	6053000101	46-50
42238	39233	7/15/2016	PRIVATE CONTRACTING	831 CONSERVE 2016	6053000101	46-50
9469	6963	6/4/2005	LIEE REFRIGERATOR REPLACE	PGEREFRIG05	6053000102	46-50
8837	8486	2/8/2005	INITIAL WEATHERIZATION	LIHEAP05	6053000102	46-50
40898	9244	10/1/2015	ECIP HEATING/COOLING ONLY	ECHS 2015,LIHEAP WX 2015,LIHEAP05	6053000102	46-50
11905	9948	10/10/2005	LIEE REFRIGERATOR REPLACE	LIHEAP05,PGEREFRIG05	6053000102	46-50
11986	9963	10/26/2005	INITIAL WEATHERIZATION	LIHEAP05	6053000102	46-50
13129	10284	4/24/2006	LIEE REFRIGERATOR REPLACE	LIHEAP06,PGEREFRIG06	6053000102	46-50
12470	10352	1/27/2006	INITIAL WEATHERIZATION	LIHEAP06	6053000102	46-50
12509	10374	2/16/2006	INITIAL WEATHERIZATION	LIHEAP06	6053000102	46-50
13122	10386	4/24/2006	LIEE REFRIGERATOR REPLACE	LIHEAP06,PGEREFRIG06	6053000102	46-50
12554	10404	4/18/2006	INITIAL WEATHERIZATION	LIHEAP06	6053000102	46-50
15523	12070	6/18/2007	INITIAL WEATHERIZATION	LIHEAP07	6053000102	46-50
18198	13885	4/16/2008	INITIAL WEATHERIZATION	LIHEAP08	6053000102	46-50
18546	14141	6/16/2008	INITIAL WEATHERIZATION	LIHEAP08	6053000102	46-50

Go to: Weatherization > Toilet Retrofit Program > TRP Eligible Weatherized Dwellings

# TRP Standalone Option:

LIHEAP 2015 Contract: “Contractor may conduct TRP HET installations without income recertification in dwellings weatherized not more than 365 days prior to the date of toilet installation, provided all other TRP requirements are met..”

You can apply custom filters to obtain a list of homes weatherized within the last year to replace high flush toilets without income verification.



Home

Contacts

HEAP

Weatherization

- Dwelling/Job Search
- Scheduling
  - Open Jobs List
  - Appointment Schedule
- Crew Time Entry
- Weatherization Marketing
- UA Marketing from Weatherization Jobs Completed
- Weatherization Admin
  - Job Reporting
  - Unreport Jobs
  - Performance Measure Checklist
  - Contract Expense Entry
  - Ineligible Address List
- CSD Bucket Reporting

### TRP Geographically Eligible Previously Weatherized Dwellings

Refresh List | Export List

Job ID	Dwelling ID	Job Completed Date	Job Type	Programs
40492	35576	6/8/2015	PRIVATE CONTRACTING	LIHEAP05, PGEREFRIG05
40897	17981	11/30/2015	ASSESS/DIAGNOSTIC ONLY	LIHEAP05
30131	21482	1/18/2012	CALLBACK	LIHEAP05, PGEREFRIG05
41493	39065	8/31/2016	ECIP HEATING/COOLING ONLY	LIHEAP05
42238	39233	7/15/2016	INITIAL WEATHERIZATION	LIHEAP05
9469	6963	6/4/2005	LIEE REFRIGERATOR REPLACE	LIHEAP05, PGEREFRIG05
8837	8486	2/8/2005	PRIVATE CONTRACTING	LIHEAP05
40898	9244	10/1/2015	REWEATHERIZATION	LIHEAP05
11905	9948	10/10/2005	WATER DEMAND REDUCTION	LIHEAP05
11986	9963	10/26/2005	LIEE REFRIGERATOR REPLACE	LIHEAP05, PGEREFRIG05
			INITIAL WEATHERIZATION	LIHEAP05

Filters:

- (Select All)
- ASSESS/DIAGNOSTIC ONLY
- CALLBACK
- ECIP HEATING/COOLING ONLY
- INITIAL WEATHERIZATION
- LIEE REFRIGERATOR REPLACE
- PRIVATE CONTRACTING
- REWEATHERIZATION
- WATER DEMAND REDUCTION

OK Cancel

## Filter Builder

The Filter Builder dialog box is open, showing a filter rule for 'Job Completed Date' with the operator 'Is greater than or equal to' highlighted in red. The dialog also shows a filter rule for 'Job Type' with the operator 'Is any of'.

The background table contains the following data:

Date	Job	Job Type	Date	Location	Priority		
	ASS ONLY	ASSESS/DIAGNOSTIC ONLY	ARRA	6000200	26-30	SALINAS VALLEY	HIGH
	ASS ONLY	ASSESS/DIAGNOSTIC ONLY	LIHE	6000200	26-30	SALINAS VALLEY	HIGH
	ASS ONLY	ASSESS/DIAGNOSTIC ONLY	ARRA	6000200	26-30	SALINAS VALLEY	HIGH
	ASS ONLY	ASSESS/DIAGNOSTIC ONLY	LIHE	6000200	26-30	SALINAS VALLEY	HIGH
	ASS ONLY	ASSESS/DIAGNOSTIC ONLY	LIHE	6000400	71-75	SALINAS VALLEY	HIGH
	ASS ONLY	ASSESS/DIAGNOSTIC ONLY	LIHE	6000400	71-75	SALINAS VALLEY	HIGH
	ASS ONLY	ASSESS/DIAGNOSTIC ONLY	LIHEAP WX 2010	6053000400	71-75	SALINAS VALLEY	HIGH

# Entering a TRP Job

Open the most current Job> click **Clone Job** on the Ribbon> Change the Eligibility Type from *Normal* to **Categorical**> Finish by clicking **Save and Close**.

ic. [US] | https://www.servtraqazure.com/Job.aspx?JobID=41493&DwellingID=39065&mar=67821739436d4081c24550e18384475a

Exit Delete Refresh Link Unlink Jobsheet Details **Clone Job**

 Edit Job  
**JobID - 41493, 682 SAN JUAN GRADE RD, SALINAS, 93906**

### Eligibility Details

Customer: SANDRA CORTEZ  
Eligibility: View/Edit Eligibility Record

### Dwelling Assessment Items

Assessment Date: 5/23/2016	Cooking Oper. Status: OPERATIONAL
Dwelling Year Built: 1953	Heater Type: INTERIOR WALL FURNACE
HUD Funded?: <input type="checkbox"/>	Heating Energy: NATURAL GAS
Lead-Safe WX Req'd?: <input type="checkbox"/>	Heater Oper. Status: OPERATIONAL
# Attached Units: 1	Water Heater Type: CONVENTIONAL
CEC Climate Zone: 3	Water Heating Energy: NATURAL GAS
Tenancy: OWNER OCCUPIED	Water Heater Oper. Status: OPERATIONAL
Building Structure: WOOD	Cooling Type: NONE
Cooking Appliance Type: RANGE	Cooling Oper. Status: NOT AVAILABLE
Cooking Energy: NATURAL GAS	

### Job Details

JobID: 41493	HPO Required?: <input type="checkbox"/>
Agency Control Code:	HPO Approval Number: 81315
Job Type: INITIAL WEATHERIZATION	<b>Eligibility Type: NORMAL</b>
Completed Date: 8/31/2016	Job Close Date:
Reported Date: 9/15/2016	Job Close Reason:
Crew Leader: ISAAC A FERNANDEZ	Job Close Note:

# QUESTIONS/COMMENTS

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

(831) 761-1747