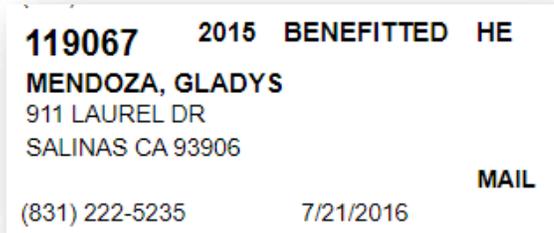


UA File Labels for Application Filing

Background

File labels can be printed from ServTraq® to file Utility Assistance applications by Application ID. File labels are printed in chronological numerical order for easy filing of benefitted and denied applications. File Label information includes:

- Application ID
- Program and Program Year
- Application Status (Benefitted/Denied)
- Customer Name
- Mailing Address
- Intake Location
- Phone Number
- Certification Date



How

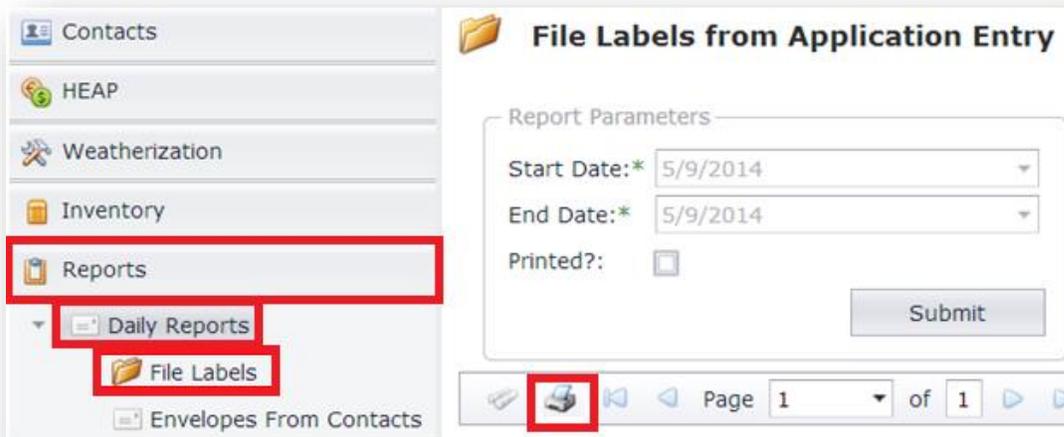
1. Log into ServTraq and under the *Reports* sections, go to **Daily Reports>File Labels**. Do not change the date parameters! The report automatically defaults to the *labels not printed*.

Note: If the report is being printed for the first time, contact the ServTraq Support Desk for assistance clearing old entries.

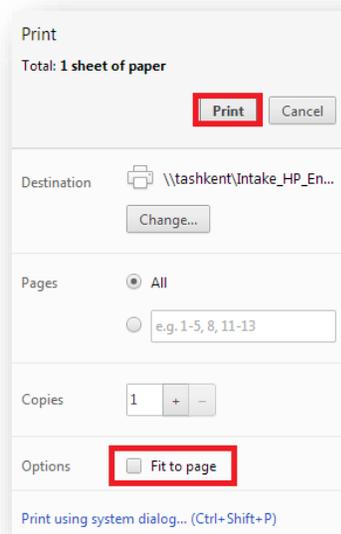
The screenshot shows the ServTraq interface for generating File Labels. On the left is a navigation menu with options like Home, Contacts, HEAP, Weatherization, Inventory, Reports, and Analytics. The main area is titled "File Labels from Application Entry" and contains a "Report Parameters" form with fields for Start Date (1/12/2018), End Date (1/12/2018), and a checked "Printed?" box. Below the form is a navigation bar showing "Page 1 of 5" and a PDF icon. The report data is displayed in a table format:

Application ID	Program Year	Status	Customer Name	Mailing Address	Phone Number	Certification Date	Notes
119060	2016	BENEFITTED	SALAZAR, JULIE	1250 E ALISAL ST APT 112 SALINAS CA 93906	(831) 262-4039	7/12/2016	MAIL
119061	2016	BENEFITTED	LOPEZ, JULIE	12 MAIN RD SALINAS CA 93906	(831) 758-5587	7/12/2016	MAIL

2. Click the *printer* icon. In the print dialogue box, **unchecked** the “Fit to Screen” option, and then click **Print**. *Note: Depending on the browser used, some additional steps may be necessary.*



(Google Chrome example)



3. The following file label type and size is recommended: **Laser & Ink Jet Labels- Size 1" x 2 5/8"**. Note how many pages of labels will be printed so the proper amount of label pages are inserted on the printer (the information can be located where it states **Page 1 of X**).

4. Apply each label to a top tab manila file folder flap and insert the matching UA application one at a time. Maintain the files in numerical order for easy filing.



Additional Resources

ServTraq Manual <http://ServTraq.com/Nimbus1.html>

ServTraq Support Support@ServTraq.com