Clone Utility Assistance Applications in ServTraq©

Background:

A payment assistance application may be processed for an additional benefit when more than one payment assistance program is available at the time of eligibility determination. Concurrent payment assistance programs can result from unexpended funds remain in a program year at the start of the next program year (LIHEAP contract term overlap).
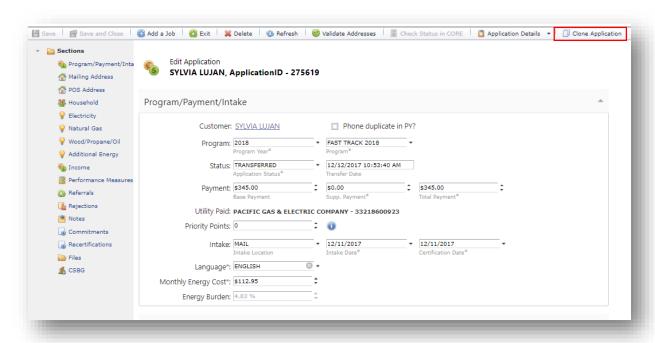
Purpose:

ServTraq© recently added the **Clone Utility Assistance Application** feature which allows a benefitted UA application to be duplicated for the purpose of benefitting the same household twice under different program years. By cloning an application, all information (with exception of the Program and Program Year) will be copied over to a new record (Application ID). Once a Program and Program Year is designated and the application is saved, a new Application ID will be generated.
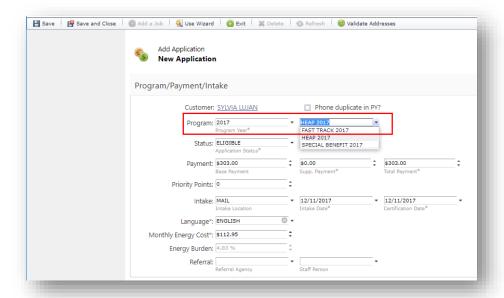
Caution:

Before cloning an application, make sure the customer is eligible to receive assistance under the second program year.
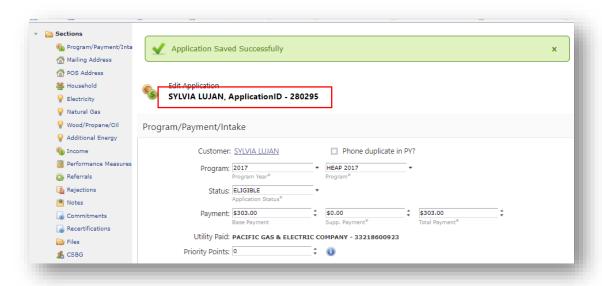
Procedure:

1) Open the benefitted application and click **Clone Application**.
   Note: The *Clone Application* button may be pushed to overflow (…) if there are too many items for the ribbon space available.

2) Select the **Program Year** and **Program** the duplicate benefit will be awarded under.

3) **Save** the Application. A new Application ID will be generated.

Possible messages:

ServTraq Message	Action
"Application Saved Successfully"	Save and Close the Application.
"Already Benefitted SSN, Account Number, or POS Address"	The household has already been served under the program year selected.
"Payment Amount cannot be $0"	Verify the household is income eligible under the Program and Program Year selected.
"Inner Exception, ServTraq staff has been notified" or any other error message	Notify ServTraq Support Staff.