

## 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.

The screenshot shows the 'Edit Application' interface for SYLVIA LUJAN, ApplicationID - 275619. The top ribbon includes buttons for Save, Save and Close, Add a Job, Exit, Delete, Refresh, Validate Addresses, Check Status in CORE, Application Details, and Clone Application (highlighted with a red box). The left sidebar lists sections like Program/Payment/Intake, Mailing Address, POS Address, Household, Electricity, Natural Gas, Wood/Propane/Oil, Additional Energy, Income, Performance Measures, Referrals, Rejections, Notes, Commitments, Recertifications, Files, and CSBG. The main form area is titled 'Program/Payment/Intake' and contains the following fields:

- Customer: SYLVIA LUJAN
- Phone duplicate in PY? (checkbox)
- Program: 2018 (Program Year\*)
- FAST TRACK 2018 (Program\*)
- Status: TRANSFERRED (Application Status\*)
- 12/12/2017 10:53:40 AM (Transfer Date)
- Payment: \$345.00 (Base Payment)
- \$0.00 (Supp. Payment\*)
- \$345.00 (Total Payment\*)
- Utility Paid: PACIFIC GAS & ELECTRIC COMPANY - 33218600923
- Priority Points: 0
- Intake: MAIL (Intake Location)
- 12/11/2017 (Intake Date\*)
- 12/11/2017 (Certification Date\*)
- Language\*: ENGLISH
- Monthly Energy Cost\*: \$112.95
- Energy Burden: 4.83 %

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

Save Save and Close Add a Job Use Wizard Exit Delete Refresh Validate Addresses

Add Application  
**New Application**

Program/Payment/Intake

Customer: SYLVIA LUJAN ☐ Phone duplicate in PY?

Program: 2017 Program Year\* HEAP 2017  
FAST TRACK 2017  
HEAP 2017  
SPECIAL BENEFIT 2017

Status: ELIGIBLE Application Status\*

Payment: \$303.00 Base Payment \$0.00 Supp. Payment\* \$303.00 Total Payment\*

Priority Points: 0

Intake: MAIL Intake Location 12/11/2017 Intake Date\* 12/11/2017 Certification Date\*

Language\*: ENGLISH

Monthly Energy Cost\*: \$112.95

Energy Burden: 4.83 %

Referral: Referral Agency Staff Person

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

Sections

- Program/Payment/Intake
- Mailing Address
- POS Address
- Household
- Electricity
- Natural Gas
- Wood/Propane/Oil
- Additional Energy
- Income
- Performance Measures
- Referrals
- Rejections
- Notes
- Commitments
- Recertifications
- Files
- CSBG

Application Saved Successfully

Edit Application  
**SYLVIA LUJAN, ApplicationID - 280295**

Program/Payment/Intake

Customer: SYLVIA LUJAN ☐ Phone duplicate in PY?

Program: 2017 Program Year\* HEAP 2017 Program\*

Status: ELIGIBLE Application Status\*

Payment: \$303.00 Base Payment \$0.00 Supp. Payment\* \$303.00 Total Payment\*

Utility Paid: PACIFIC GAS & ELECTRIC COMPANY - 33218600923

Priority Points: 0

#### 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.   |