UA Application Data-Entry in ServTraq

Background

In this step, utility assistance applications are entered in ServTraq for the purpose of transferring benefitted records to CSD's CORE system for account credit or payment; and tracking of denied applications. ServTraq© also supports the collection of CSBG household demographics for CSBG 295 Characteristics Reporting.

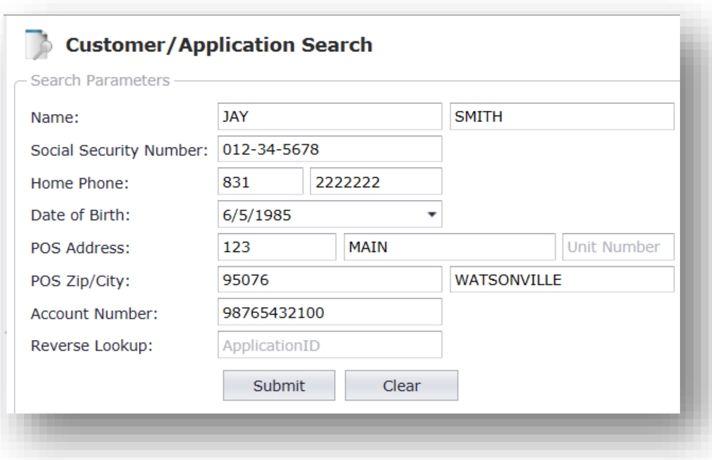
5.1. How

5.1.1. Customer Search

Go to ServTraq and select the Heap tab on the left, and then select Customer/Application Search.

Search for a customer using any or all of the fields listed in the table below. Enter as much information available to help identify an already served customer, place of service address, or account number.
Note: If you are using ServTraq© Barcoded Applications, simply scan the barcode to locate the customer record instantaneously.

- Click **Submit** to run the search



Search Field	Description
Name	Enter the First Name
	Enter the Last Name
Social Security Number	Enter the 9 digit SSN
Home Phone	Enter the home phone number without a hyphen
POS Address	Enter the Street Number

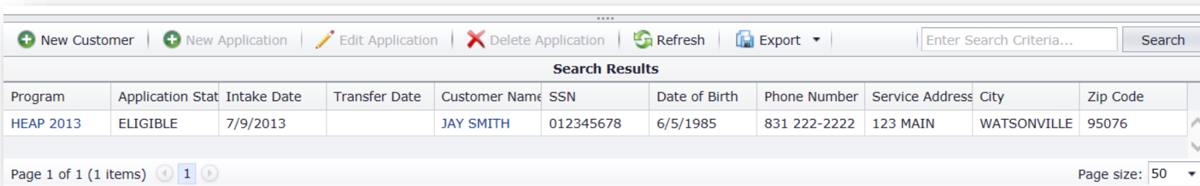
	Enter the Street Name
	Enter the Unit Number
POS Zip/County	Enter the Zip Code
	Enter the City
Account Number	Enter the energy account number

A. Search Results

Any records found are displayed under *Search Results*.

- If the customer is found, highlight the record and click **New HEAP Application**.
- If the Customer is not found, add the customer by clicking **New Customer**.

Note: ServTraq offers two data entry designs. Click New HEAP Application to use the ***One-Page Scroll Design*** *or click* ***HEAP Application Wizard*** *to navigate through the data entry sections one at a time.*

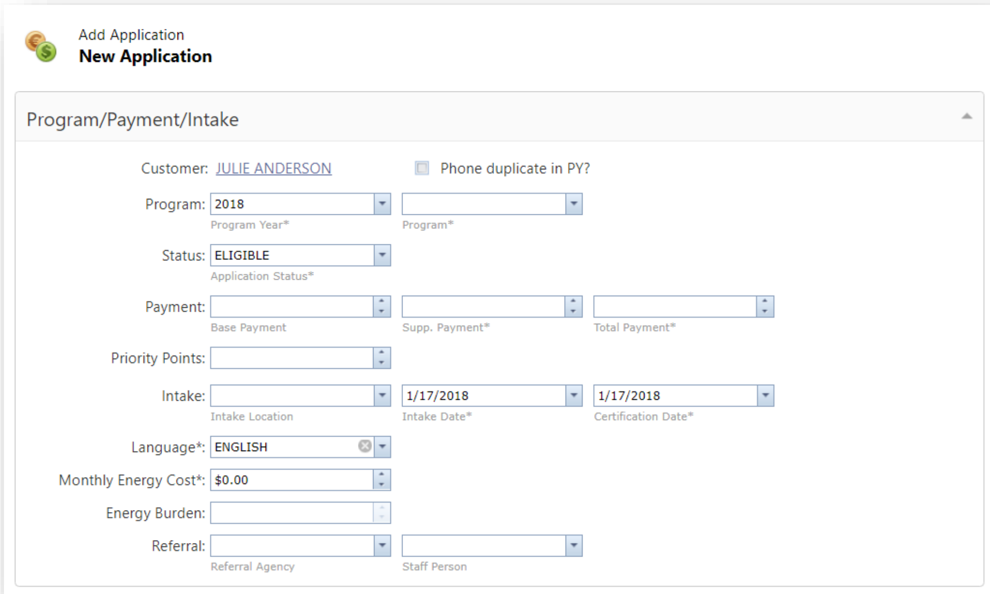


5.1.2. Add an Application

The payment assistance application data entry module is composed of the sections listed below.

A. Application Details

In the Application Details section enter the following information listed in the table below:

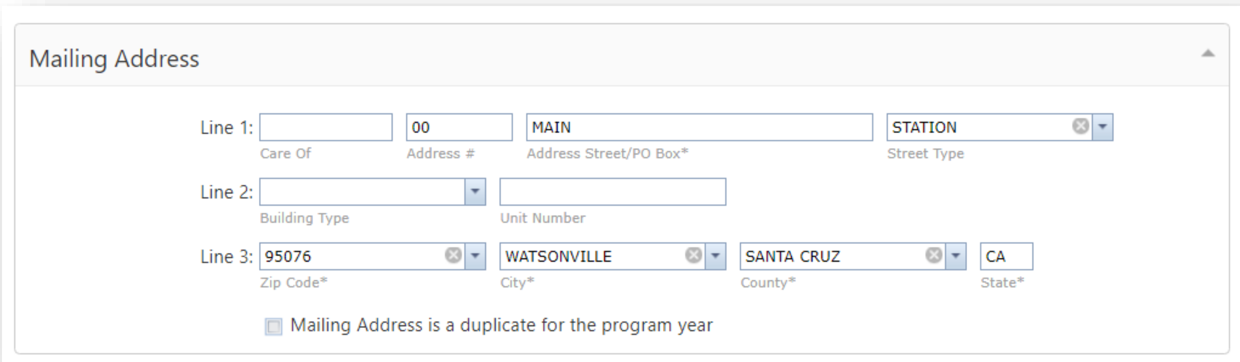


Entry Fields	Description
Customer	Click on the customer's name-link to make any edits to the customer's information (Name, DOB, SSN)
Phone Duplicate for the Program Year?	If the phone number is a duplicate within the same program year, checkmark the **Phone Duplicate Flag**.
Program	**Year-**Select the year the application will be processed under.
	Program-Select the program the application will be processed under (HEAP/FastTrack/WPO). Only select Fast Track for emergency applications. Only select WPO if the customer is applying for Wood or Propane assistance.
Status	**Application Status-**Select Eligible/Denied
Denial Reason	Select the Denial Reason (this field only appears if the application status is denied).
Payment/Priority	**Base Payment-**Automatically populates if the customer is benefitted.
	Supplemental Payment-Additional payment assistance provided (only for Fast Track applications). This amount will populate once the total payment amount is entered.
	Total Payment-The Base payment plus the supplemental amount.
Intake	**Intake Location-** Identifies where the application intake occurred.
	Intake Date- The date the agency receives or accepts an application for utility assistance.
	Certification Date-This date represents the date the applicant is deemed eligible and the agency commits to provide services.
Language	Select the customer's preferred language

Energy Cost	Enter the current energy cost
Monthly Income	Enter the household (gross) countable monthly income.
Energy Burden	Calculates automatically
Referral	If the application was submitted by a partner agency, select the agency name and staff member submitting the application

B. Mailing Address

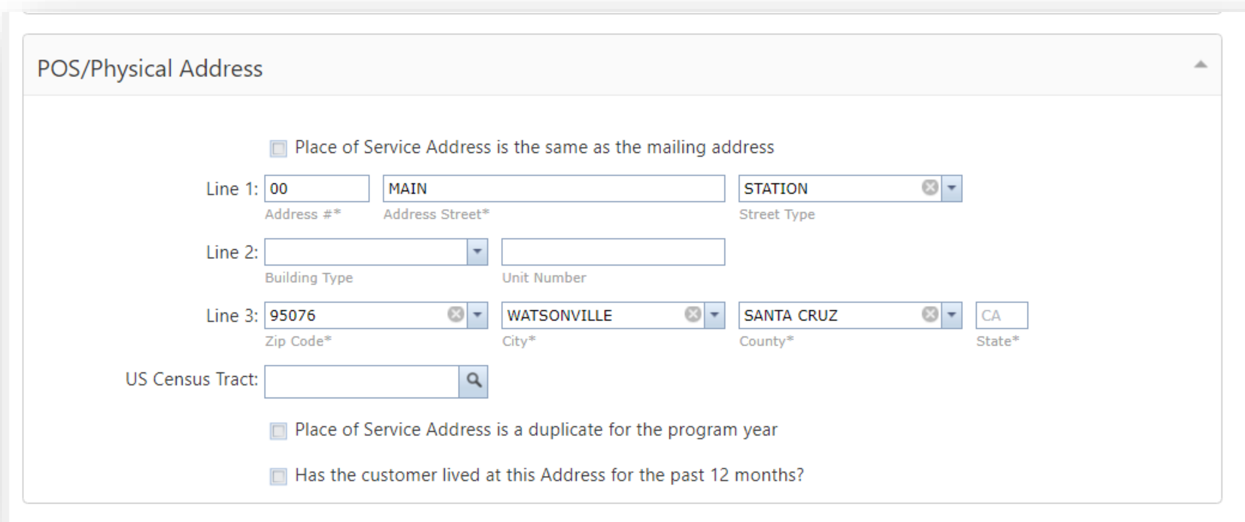
The *Mailing Address* section defaults to the address entered in a previous application, or to the address entered in the Customer Record if a previous application does not exist. Edits can be made if necessary. If the Mailing address section is blank, one must be entered (see the fields listed in the table below).



Entry Fields	Description	Required?
Line 1	Care Of (mail addressed to someone other than the customer)	Optional
	Address Number	Required*
	Name of Street/PO Box	Required
	Street Type	If Applicable
Line 2	Building Type	If Applicable
	Unit Number	If Applicable
Line 3	Zip Code	Required
	City	Required
	County	Required
	State	Required
	Flag a duplicate mailing address within the same program year	Required**
**Address number is required unless it's a descriptive or PO Box address*		
***Mailing address flag is required if the address is a duplicate for the program year*		

C. Place of Service Address

The *POS Address* section defaults to the address entered in a previous application, or to the address entered during a previous search if a previous application does not exist. Edits can be made if necessary. If the POS address section is blank, one must be entered (see the fields listed in the table below).

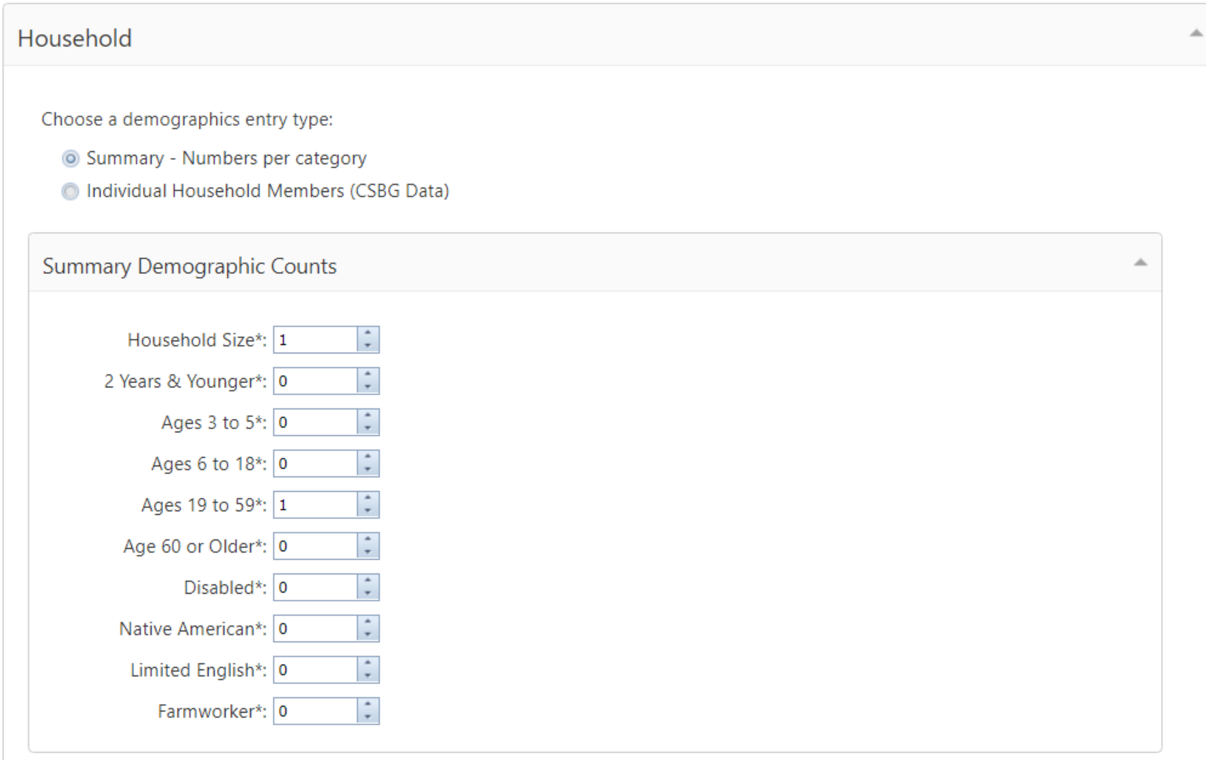


Entry Fields	Description	Required?
If the Place of Service Address is the same as the mailing address checkmark the box to copy the information over.		
Line 1	Address Number	Required*
	Address Street	Required
	Street Type	Required*
Line 2	Building Type	If Applicable
	Unit Number	If Applicable
Line 3	Zip Code	Required
	City	Required
	County	Required
	State	Required
	Flag a POS duplicate (Move In/Move Out) for the program year	Required**
US Census Tract	Identifies dwellings within eligible LIWP Census Tracts.	
If the customer as lived in the address for the past 12months, checkmark the box.		
**Address number/street type is required unless it's a descriptive address or PO Box.* ***Move in Move out flag is required if the address is a duplicate for the program year*		

D. Demographics

ServTraq provides two Demographic entry types: Summary and Individual.

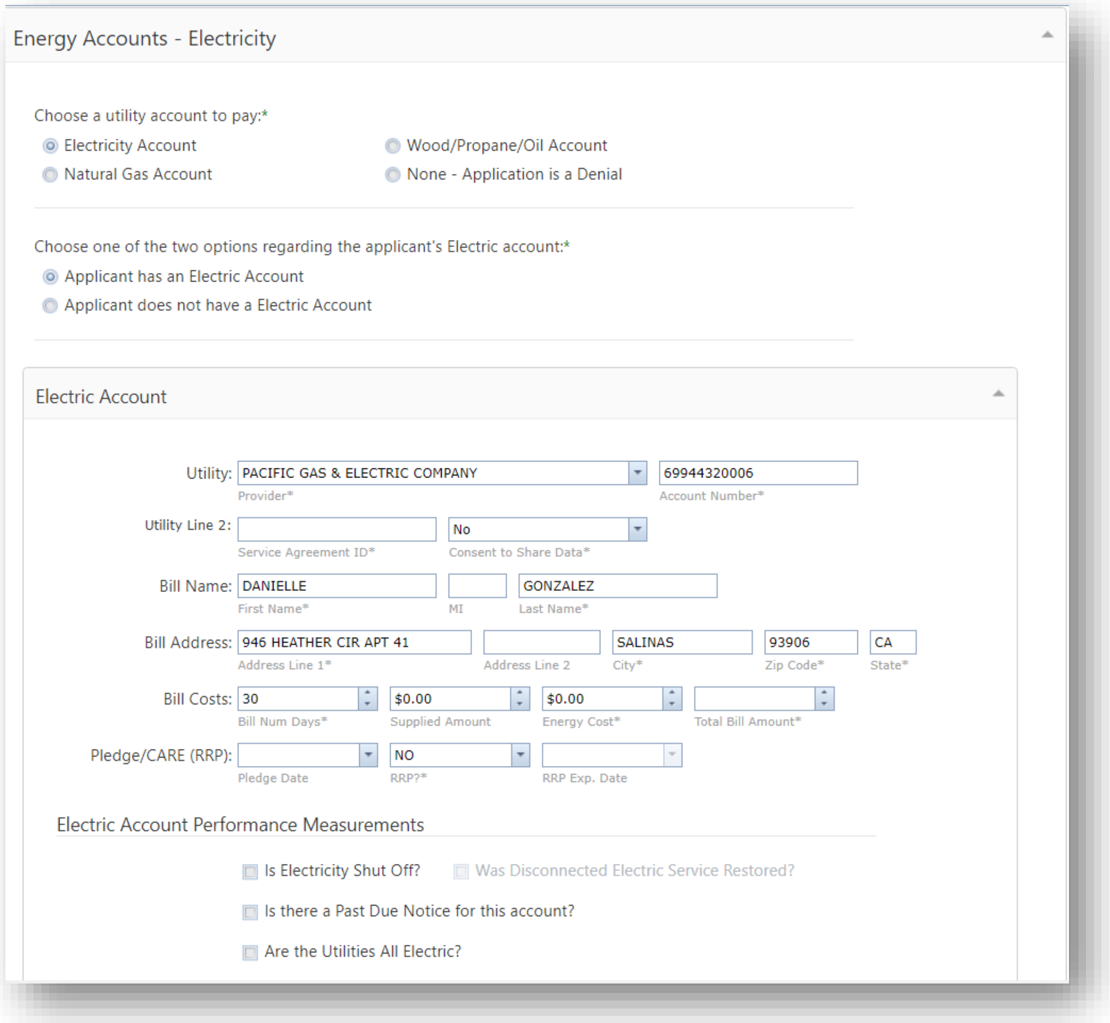
Note: To capture Individual data (CSBG Data information) refer to attachment 1.



E. Energy-Account

The *Energy Accounts* section is used to collect information on all the utility types in the household.

Step	Description
Step 1:	Identify the Utility Account to Pay. • Electric Account • Natural Account • Wood/Propane/Oil Account • None-Application is a Denial
Step 2:	Identify if the applicant uses Electric, Natural Gas or WPO as a Utility Type.
Step 3:	If the applicant has Electric, Natural Gas or WPO as a Utility Type, the account details must be entered.



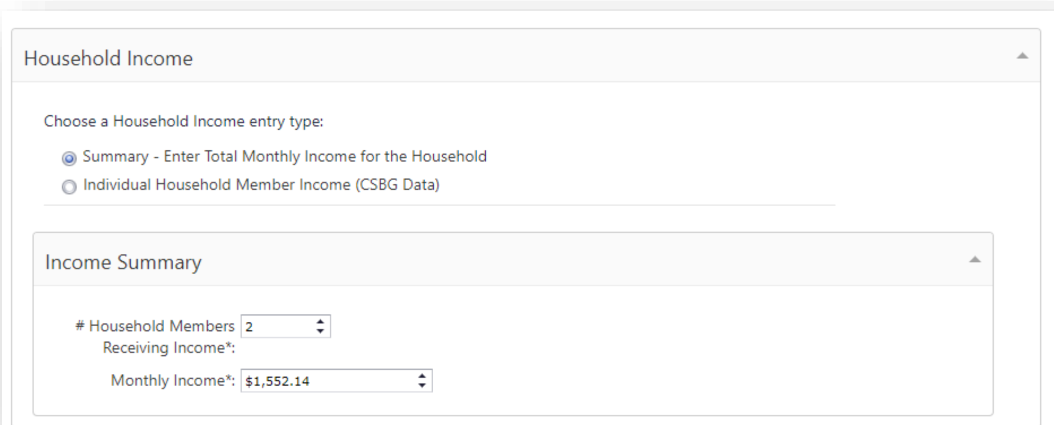
Entry Fields	Description	Required?
Utility	Select the Utility Provider	Required
	Account Number	If Applicable
	WPO Vendor* *WPO Vendors must first be added in the Vendor Library List to populate in the drop down box*	If Applicable
Bill Name	First Name	Required
	Middle Initial	Optional
	Last Name	Required
Bill Address	Line 1	Required
	Line 2	Optional
	City	Required
	Zip Code	Required
	State	Required
	Bill Number of Days	Required

Bill Information	Supplied Amount (used to pro-rate the supplied amount over a 30day period to calculate the monthly energy cost).	Optional
	Energy Cost	Required
	Total Bill Amount	Required
	Pledge Date	Optional
	RRP? (Identify if the customer is a CARE recipient by entering Y/N.)	Required
	RRP Exp Date (If the customer is enrolled in CARE enter the discount expiration date).	Required
Account Performance Measurements	Is the Utility shut-off?	Checkmark the box if the answer to the question is "Yes"
	Is there a Past Due Notice for this account?	
	Are the utilities all Electric?	
	Was disconnected service restored?	
	Is the applicant currently out of WPO fuel for this account?	
	Days of Fuel Remaining?	

F. Household Income

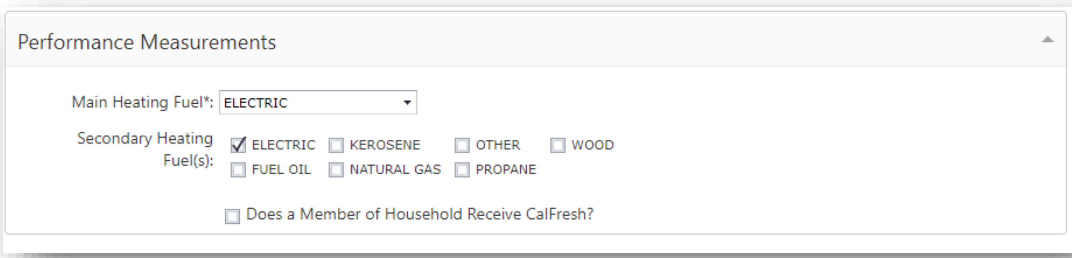
ServTraq provides two entry types: Summary and Individual. The **Household Income** type must match the **Household <u>Demographic</u>** entry type selected (section D). For information on Household Income Individual Entry, see attachment 1.

- Enter the Household Members receiving **countable** Income
- Enter the monthly (countable) income



G. Performance Measures

In this section, add any information indicated by the customer in Section D of the HEAP application. If no information was provided leave the field(s) without selection.

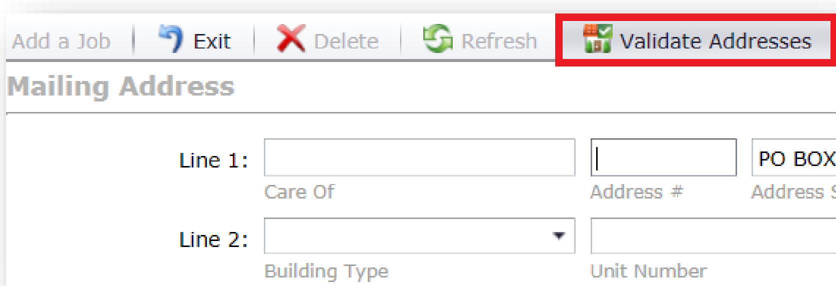


Entry Fields	Description
Main Heating Fuel	The customer's main fuel source to heat the home.
Secondary Heating Fuel(s)	The applicant's secondary or other fuel source to heat the home.
CalFresh Recipient	Check the box if the customer indicated that they receive CalFresh on Section B of the HEAP application.

5.1.3. Validate the Mailing and Service Address

Validate the Mailing and Service Address before saving the application to prevent the record from being rejected based on "Address could not be normalized". On the top ribbon, click Validate Addresses. ServTraq will address you with one of the following messages:

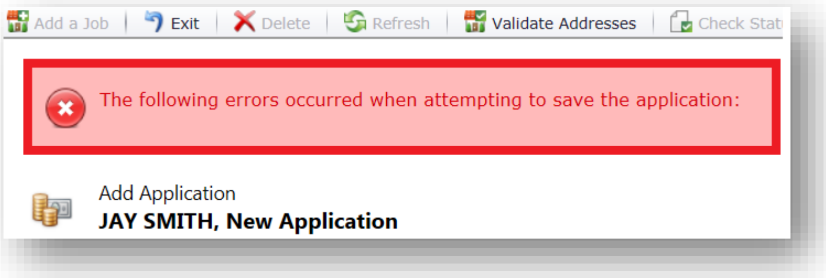
- Mailing Address validated successfully
- Invalid Address/Address could not be located
- Invalid Zip Code, the correct zip code for this address is: X (Click OK to update the zip code(s) with the correct number)



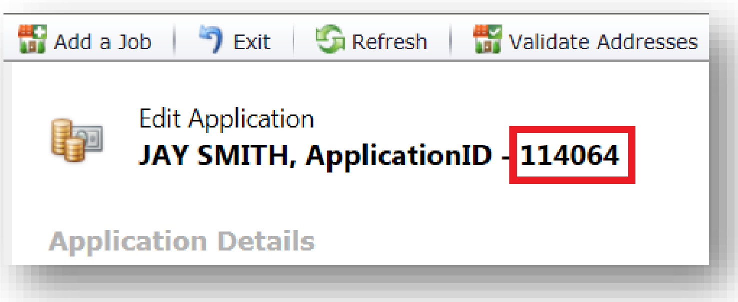
5.1.4. Generate an Application ID

Click **Save** to generate the Application ID.

If required information is missing an error message populates at the top of the screen ***after*** attempting to **save the application**.



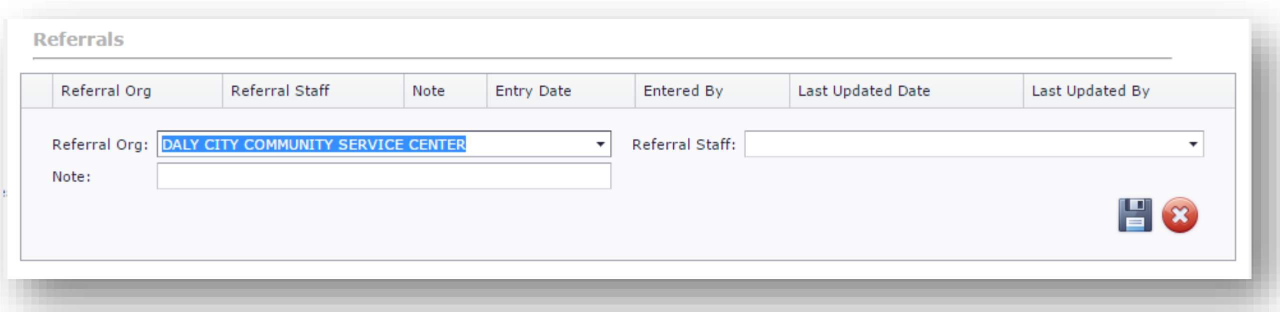
If all required information is entered, the Application ID (Appsn) is generated and displayed next to the customer name***.***



5.2. Additional Sections/Features

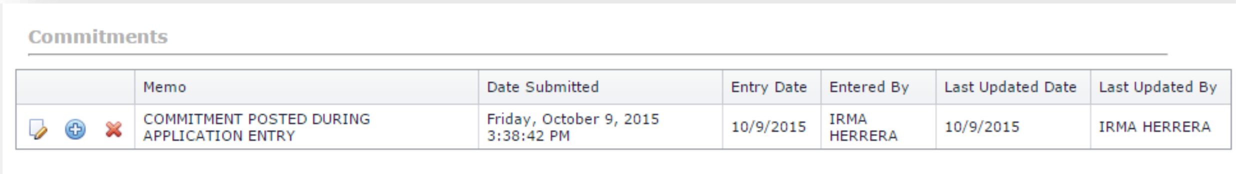
5.2.1. Referrals

Use the Referrals section to track applications referred by an organization. To utilize this feature, organizations must first be added via the Admin>Data Admin> Referral Agency Admin.



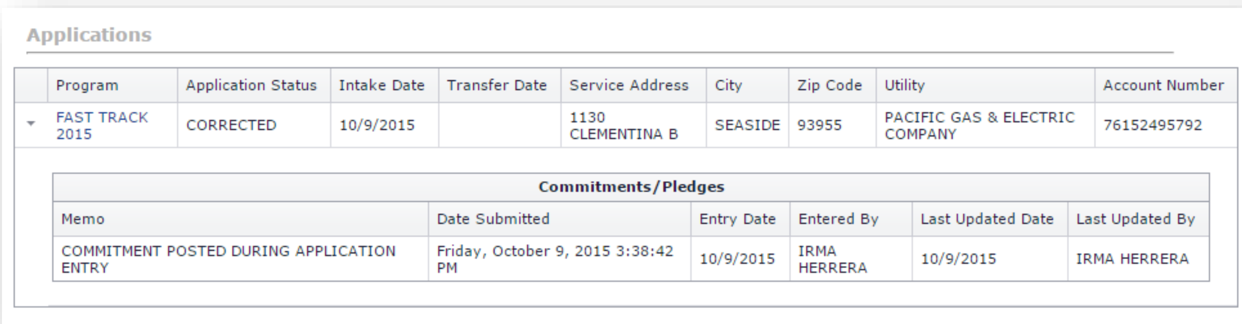
5.2.2. Commitments

Use the commitments section to track details of the pledge/commitment made on the account. The commitment entry will also be visible on the Customer Record module- Applications section for easy access.



Commitments

	Memo	Date Submitted	Entry Date	Entered By	Last Updated Date	Last Updated By
	COMMITMENT POSTED DURING APPLICATION ENTRY	Friday, October 9, 2015 3:38:42 PM	10/9/2015	IRMA HERRERA	10/9/2015	IRMA HERRERA



Applications

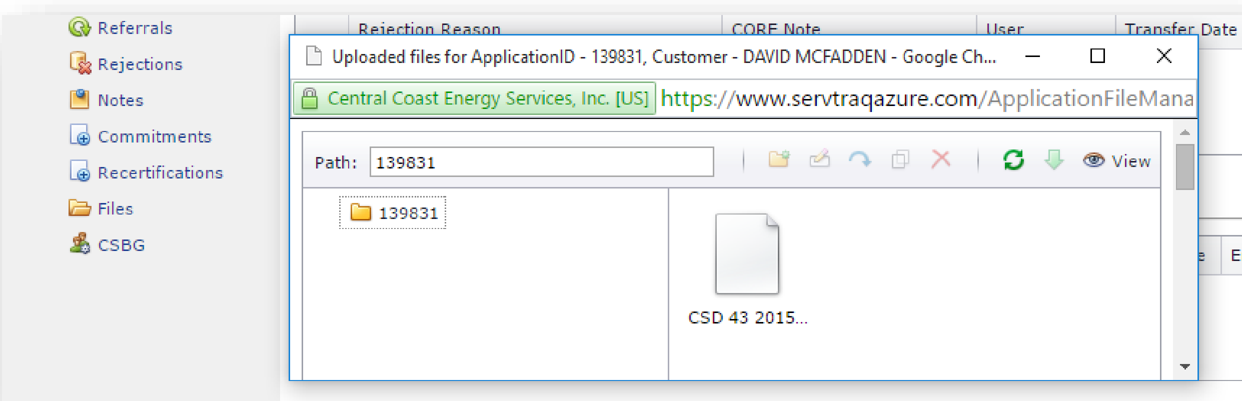
	Program	Application Status	Intake Date	Transfer Date	Service Address	City	Zip Code	Utility	Account Number
	FAST TRACK 2015	CORRECTED	10/9/2015		1130 CLEMENTINA B	SEASIDE	93955	PACIFIC GAS & ELECTRIC COMPANY	76152495792

Commitments/Pledges

Memo	Date Submitted	Entry Date	Entered By	Last Updated Date	Last Updated By
COMMITMENT POSTED DURING APPLICATION ENTRY	Friday, October 9, 2015 3:38:42 PM	10/9/2015	IRMA HERRERA	10/9/2015	IRMA HERRERA

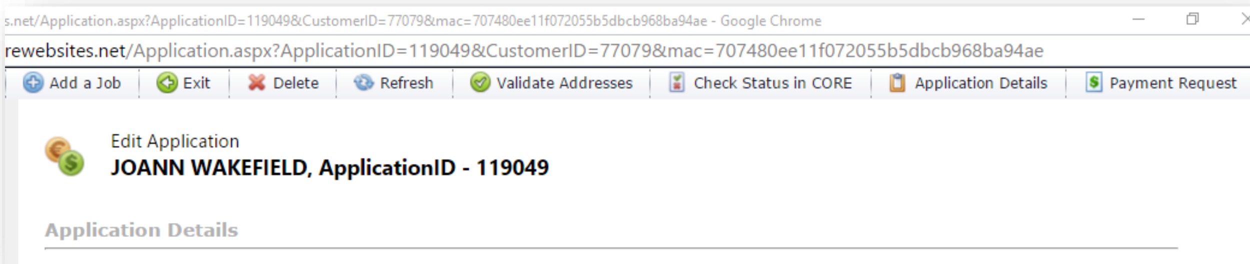
5.2.3. Files

Use the Files section to upload documents and associate them to an application.

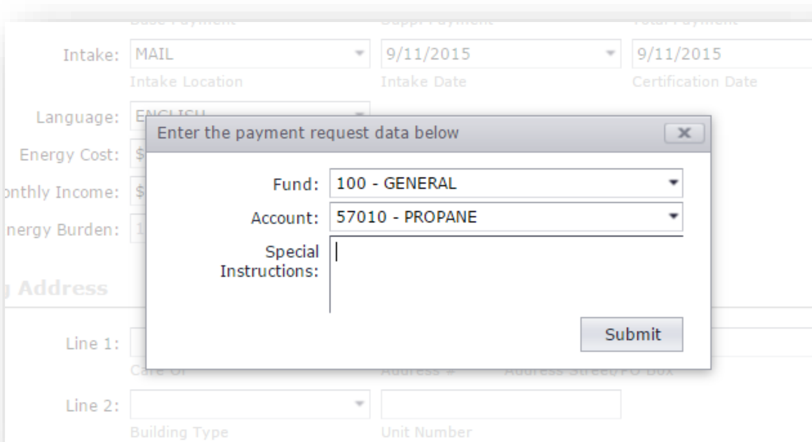


5.2.4.WPO

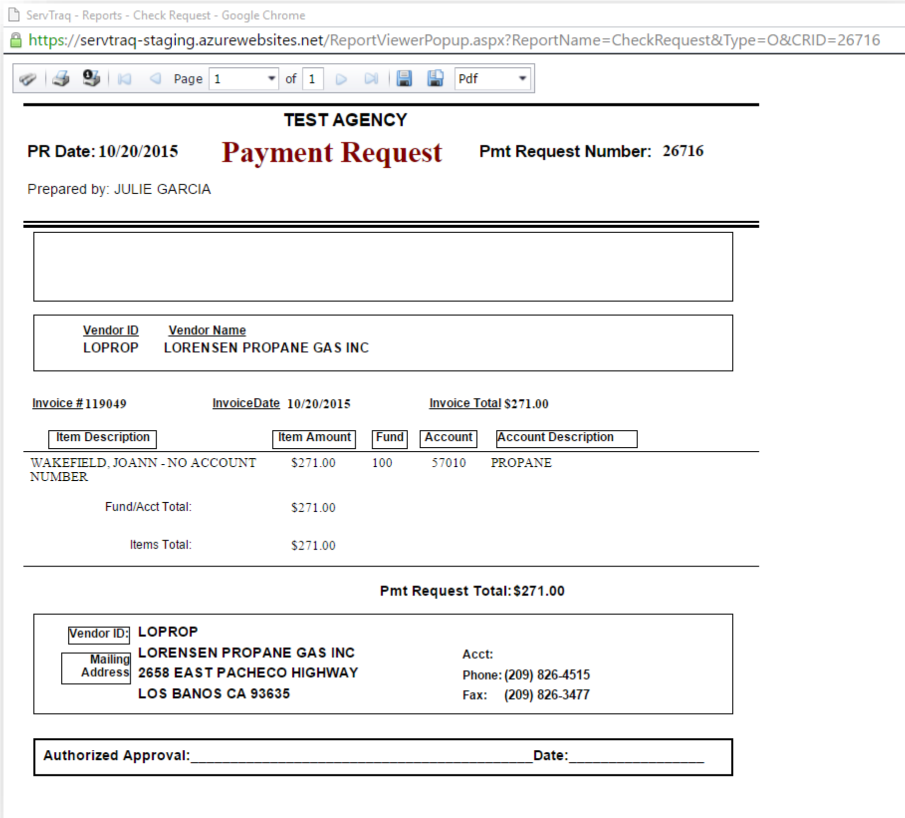
A Payment Request quick link appears on the top ribbon for WPO applications. Click the Payment Request button to generate a formal request.



Select the Fund and Account Number and click submit.



ServTraq will generate a Payment Request for the benefitted amount, and vendor selected.


ServTraq - Reports - Check Request - Google Chrome
https://servtraq-staging.azurewebsites.net/ReportViewerPopup.aspx?ReportName=CheckRequest&Type=O&CRID=26716

TEST AGENCY

PR Date: 10/20/2015 **Payment Request** Pmt Request Number: 26716

Prepared by: JULIE GARCIA

Vendor ID	Vendor Name
LOPROP	LORENSEN PROPANE GAS INC

Invoice # 119049 InvoiceDate 10/20/2015 Invoice Total $271.00

Item Description	Item Amount	Fund	Account	Account Description
WAKEFIELD, JOANN - NO ACCOUNT NUMBER	$271.00	100	57010	PROPANE
Fund/Acct Total:	$271.00			
Items Total:	$271.00			

Pmt Request Total: $271.00

Vendor ID: LOPROP
Mailing Address: LORENSEN PROPANE GAS INC
2658 EAST PACHECO HIGHWAY
LOS BANOS CA 93635
Acct:
Phone: (209) 826-4515
Fax: (209) 826-3477

Authorized Approval:____Date:________________

5.2.5. Clone Application

Clone Utility Assistance Application to benefit the same household under different program year using the same eligibility entry information. By cloning an application, all information (with exception of the Program and Program Year) will be duplicated 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.