CSBG Data Entry in ServTraq©
1/10/18

Background:

ServTraq© supports the entry and collection of CSBG household demographics for the purpose of generating the *CSBG 295 Characteristic Report*. As a result of the new 2018 CSBG data collection requirements, the **Weatherization Job Eligibility** entry process has been **updated** to synchronize with the *UA Application Entry.*

The procedure below applies to the **Utility Assistance Application** screen, and to the **Weatherization Job Eligibility Entry** screen in ServTraq©.

Procedure:

1. From the *UA Application* or the *Wx Eligibility form*, scroll to the Household Demographic section and select **Individual Household Member (CSBG Data)**.

2. In the Household Members section, click **Add Household Member** to make a new entry.
   Note: You can populate *Individual Household Member* information from the most recent UA/Wx record onto the current UA/Wx eligibility record being entered. Simply click on the **Import Household Member** button to populate the demographic information. If the household composition has changed, click on the *pencil icon* to add edit or delete entries copied over.

3: Enter the household member demographics and click the **floppy disk** to save. Repeat step 2&3 until all household members have been added.

4. In the Household Income section, select **Individual Household Member Income (CSBG Data)**.

5. In the Income by Resident section, click **Add** to make a new entry. Click the **floppy disk** to save the entry.
   Note: Only the household members added in step 3, will be listed in the "Recipient" drop down table.