# Section 6: Mail Outs

Background

When a contact entry note is created and a mailing code is used, a mail-out envelope/label is generated. The mailing code printed on the envelope/label communicates what document to insert. Documents such as award notices, denial notices, and program applications are some examples of document mail-outs that can be automated.

Getting Started

The **Envelopes from Contacts** or the **Mailing Labels from Contacts** reports generate envelope/labels with the customer's name, address, language preference and mail code selected during the contact entry stage. After printing the Envelopes or Labels report, both reports will be marked as printed to avoid duplicate mail-outs. Only one report needs to be printed (agency preference).

The language code (E/S) identifies the document language, and the mailing code identifies the type of document to be mailed to the customer. Mailing codes can be customized to fit your agency needs.

Recommended Size #10.
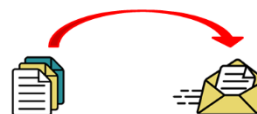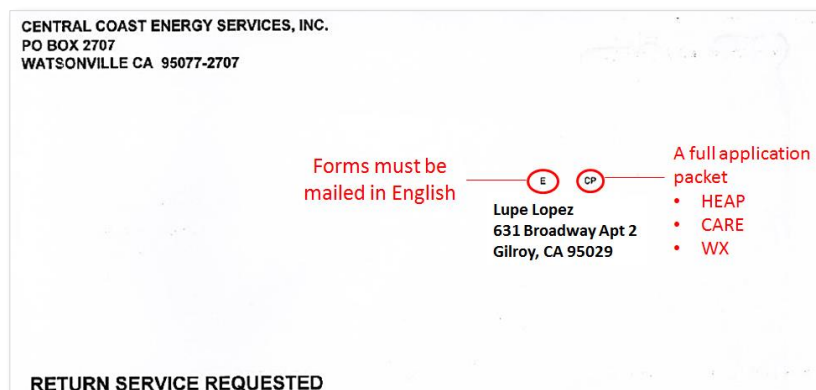
Mailing Labels from Contacts Report

The recommended label type and size is Avery 5160.

AS E AS E AX E
GEORGEANN JONES MICHELLE BAKER MARTHA LEVENSON
104 WEST ROSSI ST UNIT 3 90 GRANDVIEW ST UNIT A104 3080 CENTER ST
SALINAS CA 93901 SANTA CRUZ CA 95060 SOQUEL CA 95073

DA E IM E IM E
BARBARA BUCKLY RICHARD LEDBETTER JULIE BESSENT
788 GARNER AVE APT 9 1582 MESQUITE DR APT 101 8710 PRUNEDALE N RD SPC 40
SALINAS CA 93906 SALINAS CA 93905 SALINAS CA 93907

How

1. Log into ServTraq, and go to **Reports> Daily Reports > Envelopes from Contacts or Mailing Labels Report.**

   Do not change the date parameters! The report automatically defaults to envelopes/labels *not printed*. *Note: Only change the date parameters if the envelopes/labels did not print correctly or if there was an error while printing.*

1. Click the *printer* icon.
   Note: Envelope/label settings must be selected prior to printing the report.

Print Barcoded Applications

Mail-Out envelopes are not generated for *Payment Assistance Barcoded* applications. Use size 10 double window envelopes to mail these documents.

The back of the application will contain the customer's name, mailing address, language preference and mailing code.

1. Go to ServTraq, **Reports>Daily Reports>Barcoded Applications**

    Do not change the date parameters! The report automatically defaults to the *applications not printed. Note: Only change the date parameters if the applications did not print correctly or if there was an error while printing.*

Note: Click the **print** icon. Under Options, select **two sided** so the bar code and application can be printed on the same sheet of paper, front and back.

Tips and Tricks
ServTraq can automatically post a mail-out contact entry once a Utility Assistance Application has been benefitted or denied for the purpose of notifying customers of their application status.

Application Center
Through the help of an *Application Center*, multiple applications can be sent within minutes! Applications are sorted, and pre-folded according to type and language. Each compartment is labeled with the Language Code and Mailing/Application Code. Upon printing the envelopes/labels, staff only needs to match the corresponding mailing/application code to the

labeled envelope. The codes selected during the contact entry stage communicate what form(s) to insert in the envelope.

Source:	CONTACT ENTRY
AC	HEAP Application + (with) CARE
AP	First Time(HEAP Application) with Instructions
CA	CARE Application Only
CD	Deficient CARE application
CE	Certification Form for Included in Rent
CP	HEAP/CARE/WX/WDR Application Package
DW	Weatherization Denial Letter
FR	REFRIGERATORApplication Only
FW	Final Job Appointment Letter
IM	Deficient (Incomplete)

Reprint Envelopes

To reprint barcoded applications or envelopes, follow these steps.

1. Log into ServTraq and go to **Report>Daily Reports**, and select Barcoded Applications Report or the Envelopes from Contacts Report (depending on what you are reprinting).
2. Checkmark the *Printed box* and click **submit**.
3. Select the *date range* to reprint from. The start date and end date should be the same if you are printing for the same day. Press the *print* icon.