

## Section 6: Mail Outs

### Background

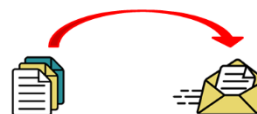
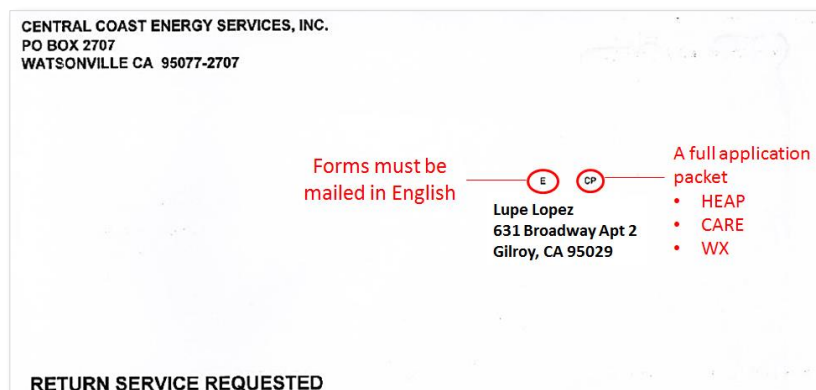
When a contact entry note is created and a mailing code is used, a mail-out envelope/label is generated. The mailing code printed on the envelope/label communicates what document to insert. Documents such as award notices, denial notices, and program applications are some examples of document mail-outs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

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HEAP

Weatherization

Inventory

Reports

Daily Reports

File Labels

Barcoded Applications

Envelopes From Contacts

Mailing Labels From Contacts

Denial Letters

CSD Data Change Requests

Commitments to Send to Utility

CARE Applications to Send to Utility

Appointment Reminder Postcards

Crew Appointment Schedule

### Envelopes from Customer Contacts

Report Parameters

Start Date: 7/21/2014

End Date: 7/21/2014

Printed?: ☐

Return Address: PO BOX 2707, WATSONVILLE, CA 95077

Submit

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PDF

CENTRAL COAST ENERGY SERVICES, INC.  
PO BOX 2707  
WATSONVILLE CA 95077

E DX  
LINDA SCHOOLFIELD  
1241 POLK ST  
SALINAS CA 93906

## 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.

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    Denial Letters  
    CSD Data Change Requests  
    Commitments to Send to Utility  
    CARE Applications to Send to Utility  
    Appointment Reminder Postcards  
    Crew Appointment Schedule

Barcoded Applications from Contact Entry

Report Parameters

Start Date: 7/21/2014  
End Date: 7/21/2014  
Printed?: ☐  
Return Address: PO BOX 2707, WATSONVILLE, CA 95077

Submit

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2014

CENTRAL COAST ENERGY SERVICES  
PO BOX 2707 - Watsonville, CA 95077  
1-888-728-3637  
Serving Monterey and Santa Cruz Counties

HEAP 2014 LIHEAP/DOE INTAKE FORM (Rev.1/2014)

HE				FT	WP	DN	Intake Date:
First Name:		Middle Initial:		Last Name:			
Mailing Address:						Unit Number:	
Mailing City:		Mailing County:		Mailing State:		Mailing Zip Code:	

## 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	REFRIGERATOR Application 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.

 Envelopes from Customer Contacts

Report Parameters

Start Date:\* 7/22/2014

End Date:\* 7/22/2014

Printed?: ☒

Return Address:\* 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076

Submit