

Clone Utility Assistance Applications in ServTraq®

Background:

A LIHEAP 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 remaining 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 displays the 'Edit Application' interface for SYLVIA LUJAN, ApplicationID - 275619. The left sidebar lists various sections, and the main area shows the 'Program/Payment/Intake' form. The form includes fields for Customer (SYLVIA LUJAN), Program (2018), Status (TRANSFERRED), Payment (\$345.00), and Intake (MAIL). It also shows a 'Clone Application' button in the top right corner of the ribbon.

Field	Value
Customer	SYLVIA LUJAN
Program	2018
Status	TRANSFERRED
Payment	\$345.00
Intake	MAIL
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.

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.