Step 8: Application Data Transfer Cycle

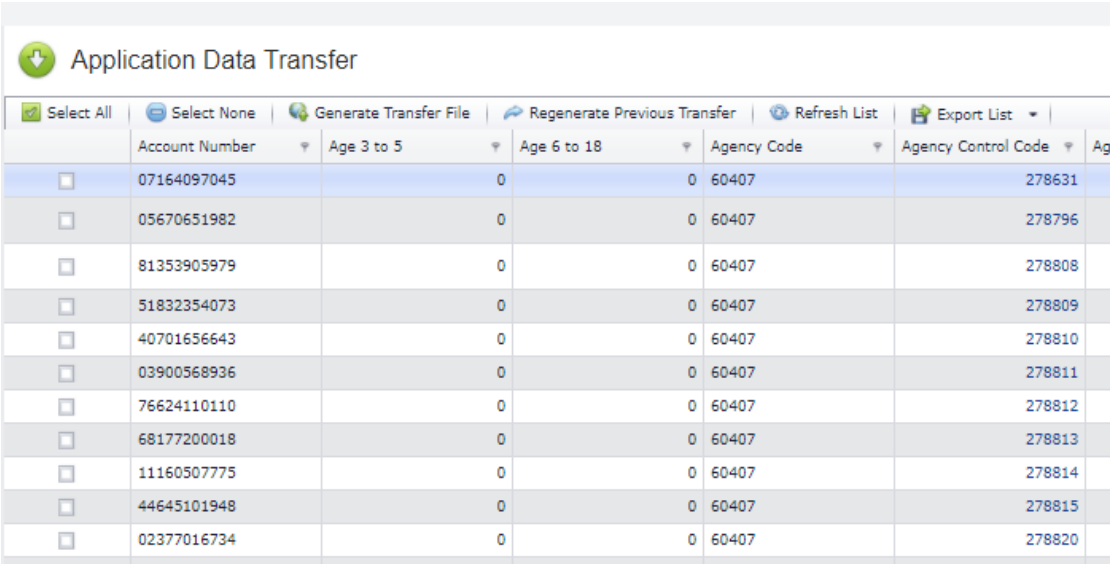
Background

Application Data Transfers are done to import *Payment Assistance Applications* to CSD's CORE database. Each application submitted is validated and is assigned a status by CORE. Applications marked as "*Complete*" will be processed for payment and do not require any further action. Applications marked as "*Working-Deficient* or *Rejected*" do not meet all the validations in CORE, and will need to be corrected in ServTraq before re-transfer(possibly).

8.1. Generate the Transfer File

A. Open the *Application Data Transfer* screen in ServTraq. Click **Select All** unless *Conditional Considerations*[1] guide this step otherwise.

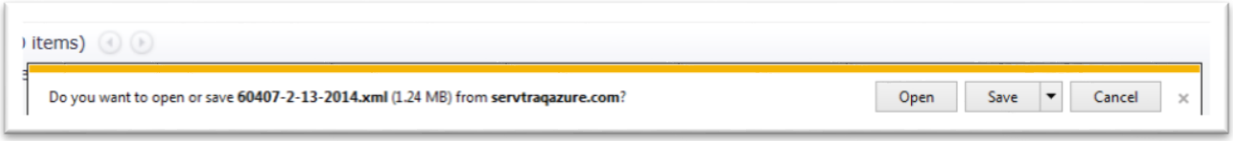
B. After selecting the applications to transfer, click **Generate Transfer File**. A message appears informing you the *Transfer File* is being generated. **Do not close/exit the screen, or your transfer file will be lost.**



Account Number	Age 3 to 5	Age 6 to 18	Agency Code	Agency Control Code	Ag
07164097045	0	0	60407	278631	
05670651982	0	0	60407	278796	
81353905979	0	0	60407	278808	
51832354073	0	0	60407	278809	
40701656643	0	0	60407	278810	
03900568936	0	0	60407	278811	
76624110110	0	0	60407	278812	
68177200018	0	0	60407	278813	
11160507775	0	0	60407	278814	
44645101948	0	0	60407	278815	
02377016734	0	0	60407	278820	

[1] Conditional Considerations are changes in work environment scenarios that cause operations to shift. Any column can be filtered to only display applications that meet the criteria selected. For example, use the *Program Code* column filter to only view applications for a specific program.

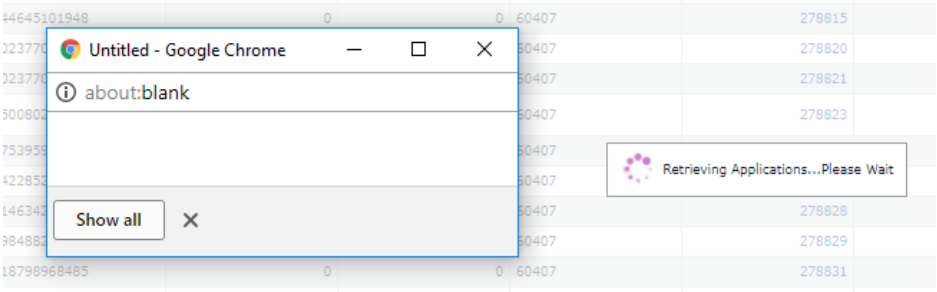
C. Once the file downloads, **Open** the file and click **Enable Editing** on the Excel spreadsheet.



Warning:

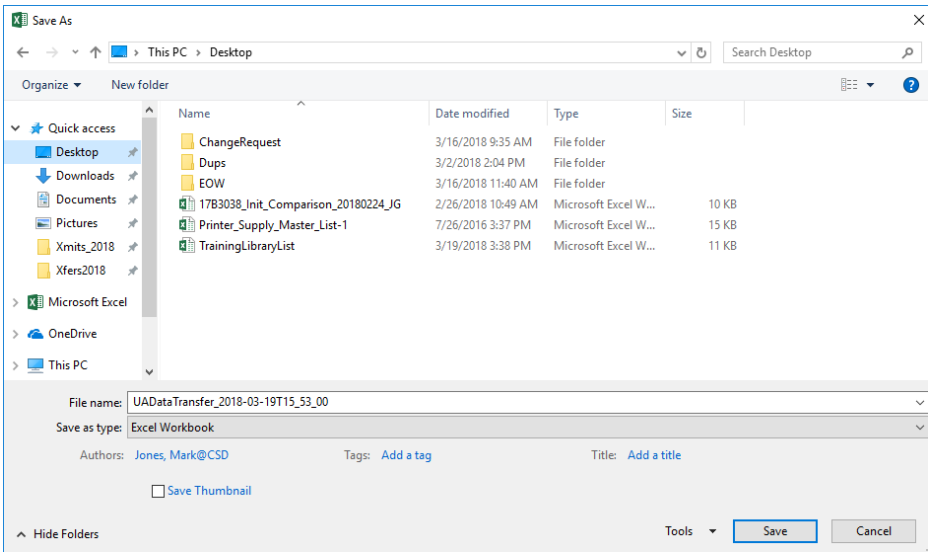
Make sure your default browser is set to “ASllow all pop-ups from ServTraq”.

When generating a transfer from Chrome, a second window will open with the download file. Once the file is saved to your network, you must close that second window to close the loading icon.



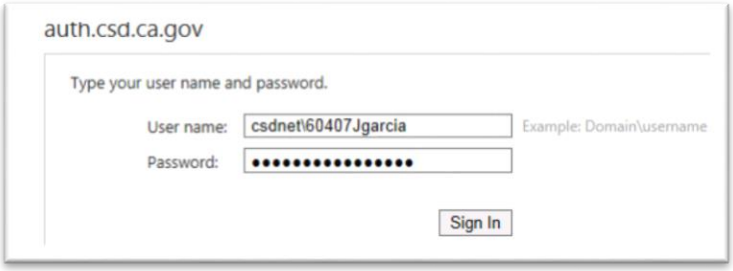
8.2. Save the Transfer file in the Network

A. Save the Transfer file (**File→Save As**) in the designated folder. The file name is automatically generated with the *Agency Code+Date Exported (i.e. 60407-01-23-2014)*. Save the file type as “Excel Workbook”.

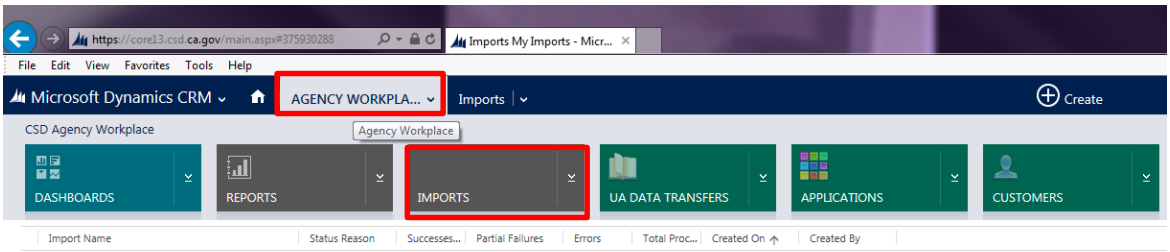


8.3. Log into CORE and Import the File

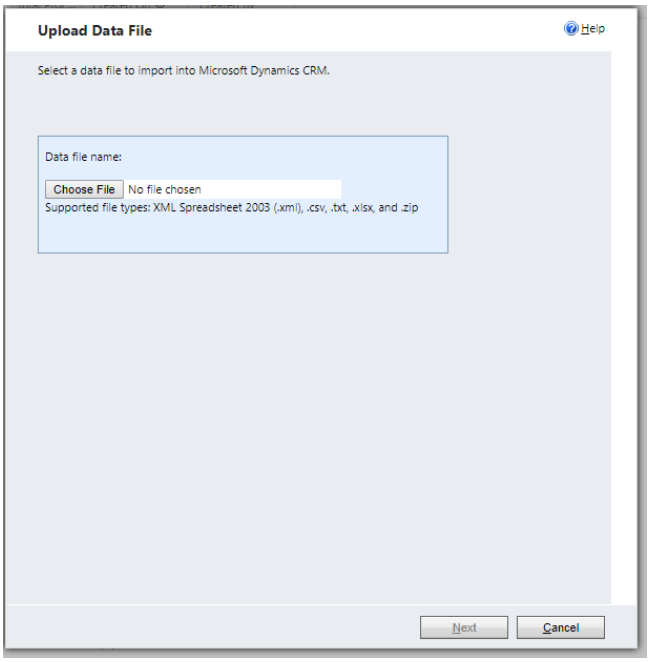
A. Log into CORE (https://core13.csd.ca.gov) and enter your username, password, and click **Sign In**.



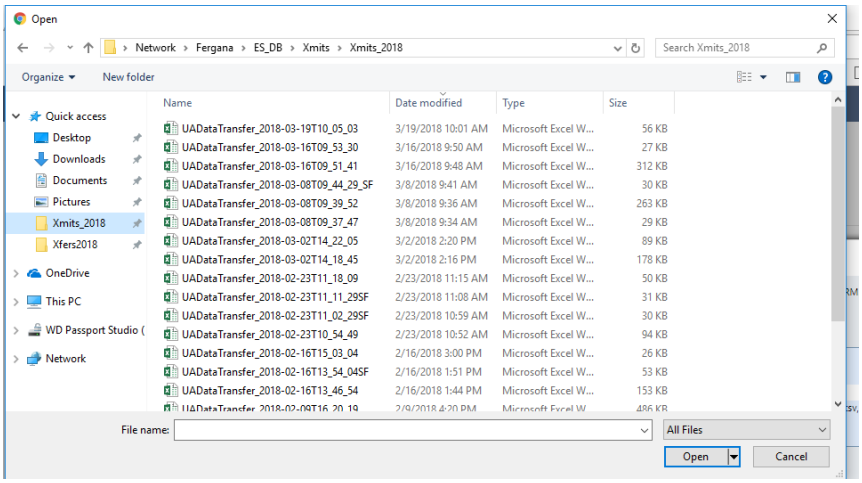
On the Navigation Pane click: **Agency Workplace>Imports>Import D**



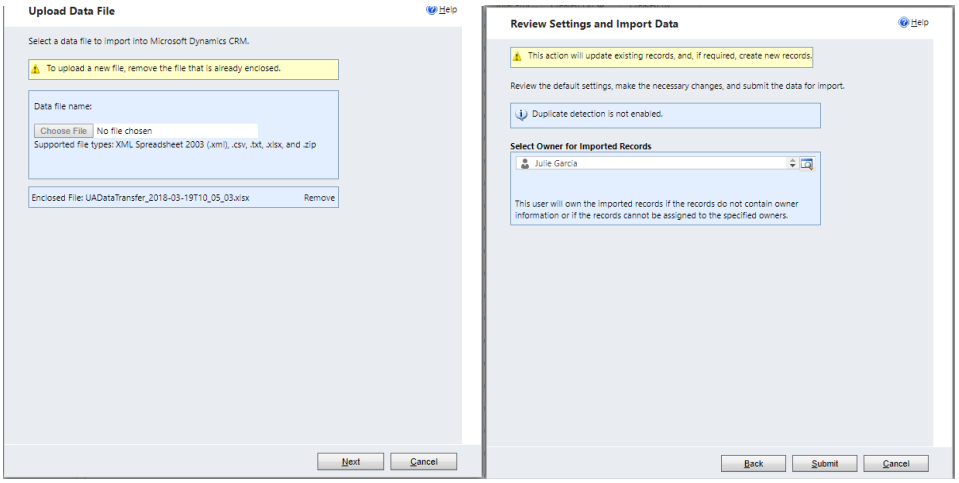
B. Click **Choose File** to browse for the transfer file generated in step 2.



C. Locate your transfer file and click **Open**.

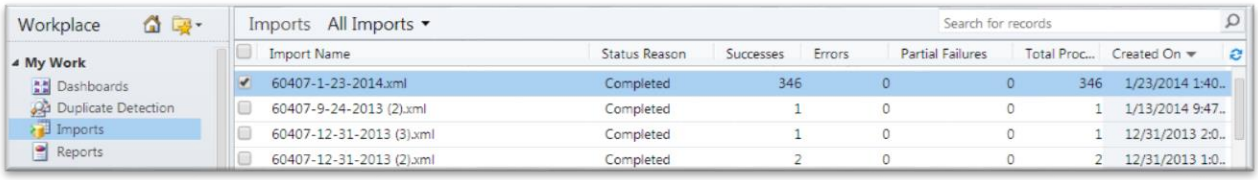


D. From the *Upload Data File* window, click **Next**. Click **Submit** to import the file and click **Finish**.



8.4. Monitor the Import

A. From the *Imports* screen, monitor the file until the *Status Reason* column reads "**Complete**". Click the *Refresh* icon on the far right to update the file status. Once the file reaches a "Complete" status. The total number of *Successes* should equal the *Total Processed* number. Compare the number of *Successes* to the number of transferred records.



B. Run the Deficiency-Rejection Report in CORE to identify any records needing correction.