

9. Rejected Records in ServTraq©

Background

CORE Rejected Utility Assistance records require entry in ServTraq to “open” the file for corrections or ultimately deny the applicant if the rejection reason cannot be fixed.

Enter Rejected Records in ServTraq

1. From the HEAP menu, click on **Rejected Record Search and Entry**. Enter the *Application ID* and click **Submit**. Click on the **ACC number** to open the application and log the rejection reason stated in the CORE Deficiency/Rejections report.

Rejected Record Search and Entry

Enter the ApplicationID/ACC and click submit

ApplicationID:* 277440

Submit Clear

Program	ACC	Name
SAN MATEO - FAST TRACK 2017	277440	ANGEL MARTINEZ MENDOZA

2. From the left menu, click **Rejections**. Click the **addition** icon to add the rejection reason(s). Select the rejection reason from the drop down table and click the **floppy disk** icon to save. If the record was rejected for more than one reason, repeat the process to add an additional reason. Click **Save and Close** to continue entering rejected records. Repeat this process until all rejected records in the *CORE Deficiency Rejections report* are re-entered in ServTraq.

Rejections

Rejection Reason	CORE Note	User	Transfer Date	Clear Date
APPLICANT IS DECEASED	CORE Note:	JULIE GARCIA	3/19/2018	

Rejection Reason: APPLICANT IS DECEASED

CORE Note:

User: JULIE GARCIA

Transfer Date: 3/19/2018

Clear a Rejected Records in ServTraq

1. From the HEAP menu, click **Rejected Record Clearance**.

The screenshot shows the SERVTRAQ interface. On the left is a navigation menu with 'HEAP' expanded, showing options like 'Customer/Application Search', 'Online Application Processing', 'Application Data Transfer', 'Rejected Records', 'Rejected Record Search and Entry', and 'Rejected Record Clearance'. The main area is titled 'Rejected Record Clearance' and contains buttons for 'Clear Rejection', 'Delete Rejection', 'Refresh List', and 'Export List'. Below these is a table with the following data:

Program	ACC	Last Name/First Name	User
MONTEREY - HEAP 2018	281238	MELENZ SILVIA	JULIE GARCIA
MONTEREY - HEAP 2018	281999	MARTINEZ VICTORIANO	JULIE GARCIA

2. Click on the **ACC number** to open the application. Scroll down to the field causing the rejection. Correct the field if possible and click **Save**.

The screenshot shows the 'Edit Application' page for 'SILVIA MENDEZ, ApplicationID - 281238'. The left sidebar lists various sections, with 'Rejections' highlighted. The main content area is titled 'Program/Payment/Intake' and contains the following fields:

- Customer: SILVIA MENDEZ
- Program: 2018 (Program Year*)
- Status: REJECTED (Application Status*)
- Payment: \$306.00 (Base Payment)
- Phone duplicate in PY? (checkbox)
- HEAP 2018 (Program*)
- 3/16/2018 9:51:41 AM (Transfer Date)
- \$0.00 (Supp. Payment*)
- \$306.00 (Total Payment*)

3. From the left menu, click **Rejections**. Click the **eraser** icon to clear the rejection.

The screenshot shows the 'Rejections' table with the following data:

	Rejection Reason	CORE Note	User	Transfer Date	Clear Date
	APPLICANT IS DECEASED		JULIE GARCIA	3/19/2018	

4. If the rejection cannot be corrected (such as Agency out of Funds), change the application status to **Denied**, select the denial reason, and click **Save and Close**. ServTraq will automatically remove the rejected record from your clearance list.

The screenshot shows the 'Edit Application' window in ServTraq. The left sidebar contains a 'Sections' menu with options: Application Details, Mailing Address, POS Address, Demographics, Performance Measures, and Energy. The main content area is titled 'Edit Application' and shows 'MARIA ELENA LUGO, ApplicationID - 118801'. Below this, the 'Application Details' section contains the following fields:

Customer:	MARIA ELENA LUGO	<input type="checkbox"/> Phone duplicate in PY?
Program:	2013	FAST TRACK 2013
Program Year:		Program
Status:	DENIED	PROGRAM OUT OF FUNDS FOR THIS CALENDAR YEAR.

At the bottom of the status dropdown, there are two small links: 'Amend Application' and 'Printed Business'.