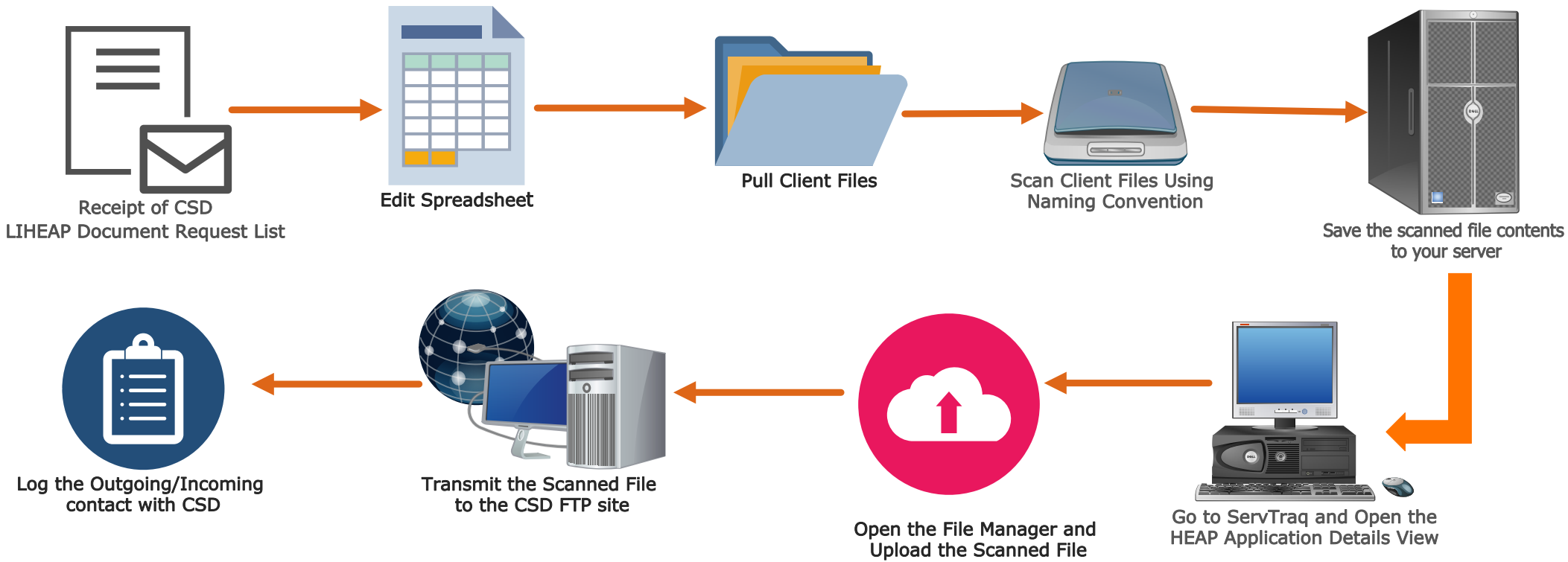


## Monitoring Documents



## Monitoring Document Request Process

### Best Practices

#### 1. Receipt of CSD LIHEAP Document Request

The 8/14/2018 CSD webinar said "The LIHEAP review will consist of a minimum of 20 to 40 client files from the Utility Assistance and Wood, Propane, and Oil components."

#### 2. Edit the File Request Spreadsheet

Edit the CSD File Request Spreadsheet and include the following column headers to account for each step in the process being completed. Print only one copy of the edited spreadsheet for file control purposes.

Field	Purpose
<b>Scanned File Name</b>	Use this column to re-name the scanned file according to the CSD naming convention established.(i.e. ACC_LastName_FirstLetter of FirstName_ProgramCode.pdf"
<b>Paper File Found?</b>	Use this column to indicate the client paper file was found.
<b>Uploaded to ServTraq?</b>	Use this column to indicate the renamed scanned file has been uploaded to ServTraq.
<b>Sent to CSD FTP?</b>	Use this column to indicate the scan has been sent to the CSD FTP site.

#### 3. Pull Client Files

As files are matched and pulled from storage, each ACC (Agency Control Code/Job ID/ApplicationID) may be checked off the list (Paper File Found column). If more than one person is pulling files, give each a separate page rather than the entire list.

#### 4. Scan and Rename

Scan the paper file and rename the electronic file according to the CSD Naming Convention:  
*ACC\_LastName\_FirstLetter of FirstName\_ProgramCode.pdf*

Once the file is scanned and renamed, check off the ACC from the list (Uploaded to ServTraq column).

#### 5. Save on Server

Save the scanned file contents to your server (write down the path/foldername) or to a computer you will use to locate the scanned files for upload to ServTraq.

## ServTraq File Upload to CSD FTP Instructions

### 1. Open ServTraq

**Utility Assistance Applications:** Open ServTraq and go to the HEAP Customer/Application search page. Enter the ACC/ApplicationID and open the *Application Details* page.

Customer/Application Search

Search Parameters

Barcode:

Name:  First Name  Last Name

Social Security Number:

Home Phone:  Area Code  Phone Number

Date of Birth:

POS Address:  Street #  Street Name  Unit Number

POS Zip/City:  Zip Code  City

Account Number:  Utility Account Number

Second Account Number:  Second Utility Account Number

Reverse Lookup:  292901

New Customer New HEAP Application HEAP Application Wizard Edit Application

Program	Application Status	Payment Amount	Intake Date
HEAP 2018	TRANSFERRED	\$244.00	8/27/2018

**Weatherization Jobs:** Open ServTraq and go to the Dwelling/Job search page. Enter the JobID and open the Job Details page.

Dwelling/Job Search

Search Parameters

POS Address:  Street #  Street Name  Unit Number

POS Zip/City:  Zip Code  City

Name:  First Name  Last Name

Social Security Number:

Home Phone:  Area Code  Phone Number

Permit Number:

Reverse Lookup:  47535  DwellingID

New Dwelling New Job Edit Job Refresh Export

Dwelling ID	Job ID	Completed Date	Closed Date	Job Type
42732	47535	6/22/2018		ECIP HEATING/COOLING

### 2. Open File Manager

From the Sections panel, click "Files" to open the File Manager. Click Browse to locate the scanned files.

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**

Edit Application

IKUE MIYASHITA, ApplicationID - 292901

Program/Payment/Intake

Customer: IKUE MIYASHITA  
Program: 2018  
Status: TRANSFERRED  
Payment: \$244.00  
Utility Paid: PACIFIC GAS & ELECTRIC COMPANY  
Priority Points: 0

Sections

- Assessment Items
- Job Details
- Measures
- Validation Summary
- Rejections
- ECIP Justification
- Notes
- Related**
- Appointments
- Status History
- Files**
- Image Gallery
- Audit/Change History
- LIWP Phase 2 Data

Edit Job

JobID - 47535, 436 RAINER DR,

Eligibility Details

Customer: JUAN BERMUDEZ  
Eligibility: View/Edit Eligibility

Dwelling Assessment Items

Assessment Date: 4/18/2018  
Dwelling Year Built: 1961  
HUD Funded?: ☐  
Lead-Safe WX Req'd?: ☐  
# Attached Units: 1

Browse for the scanned file to *Upload*. If you have the file folder open, you can simply *drag and drop* the scanned file into the File Manager for upload.

Uploaded files for ApplicationID - 293037, Customer - MACRISTINA MACATO - Google Chrome

Central Coast Energy Services, Inc. [US] | https://www.servtraqazure.com/ApplicationFileManager?ApplicationID=293037&CustomerID=235047

Path: 293037

293037

You can also drag and drop documents here for upload.

Drop file(s) here
Browse...
Upload








If a scanned application already exists in the File Manager, download the document to ensure all necessary documents are included. If all documents are included, rename the scanned file according to the CSD Naming Convention established.

Path: 292901

292901

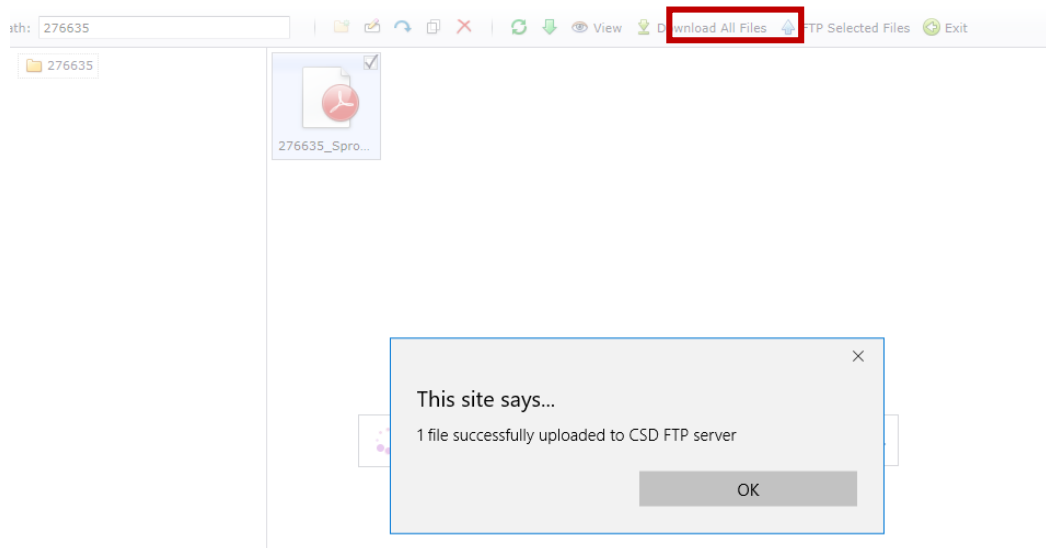
1234\_Garcia\_...

Icon	Description
	<b>Rename</b> the document uploaded
	<b>Move</b> the document to another folder

	<b>Copy</b> the document uploaded and save it into another folder
	<b>Delete</b> the document upload
	<b>Refresh</b> page
	<b>Download</b> the documents uploaded
	<b>Upload the selected documents to the CSD FTP site</b>
 View	<b>Detail View</b> or <b>Thumbnail View</b> of documents uploaded
 Exit	<b>Exit</b> File Manager

### 3. Transmit files to CSD FTP

Select the scanned file to send to CSD and click the **FTP Selected Files** button. If you are following the Best Practices outlined above, check off the ACC off the list (Send to CSD FTP column).



ServTraq will log an automatic contact entry note within the application page recording the transfer.

Monitoring Contacts		CORE Status Updates				
CORE Update Id	Last Status Change Date	Import Status	Import Status Change Date	Application Status	Application Status Change Date	Payment Create Date
e57fcc70-f90d-e811-8143-0050568c4631	4/4/2018	Accepted	2/9/2018	Completed	2/9/2018	2/9/2018
Monitoring Contact Log						
Contact Type	Document Reference	CSD Representative	Note	Entered By	Entry Date	
OUTGOING	276635_Sproul_B__EW.pdf.pdf		FILE UPLOADED TO CSD FTP SITE	MARIBEL ROCHA	9/4/2018	

#### 4. Log the Contact

Use the **Monitoring Contacts** section to log any incoming or outgoing contact with CSD related to the documents submitted. Click the *addition* icon to add a new entry, click the *floppy* disk icon to save the entry.

Files  
CSBG  
CORE Status History  
**Monitoring Contacts**

CORE Status Updates

CORE Update Id	Last Status Change Date	Import Status	Import Status Change Date	Application Status	Application Status Change Date	Payment Create Date
No data						

Monitoring Contact Log

Contact Type	Document Reference	CSD Representative	Note	Entered By	Entry Date
Contact Type: *		Document Reference:			
CSD Representative:		Note:			

Field	Description
Contact Type	<b>Incoming</b> -CSD contacted the Agency <b>Outgoing</b> -Agency contacted CSD
CSD Representative	CSD Representative with whom contact was established
Document Reference	Reason for the contact (document, additional information, clarification requested)
Note	Any additional notes