



ServTraq Marketing & Outreach Tools

Webinar 2.22.18

Goal

Optimize ServTraq solutions to facilitate **Marketing & Outreach** efforts and generate leads with prospective applicants for:

- ▶ LIHEAP Payment Assistance
- ▶ LIHEAP Weatherization

Is your House or Apartment COLD in the Winter & HOT in the Summer?

Apply Today for FREE Home Weatherization Services!

The **FREE** Home Weatherization program provides an energy and safety assessment with installation of energy conservation measures that improve living conditions and reduce energy costs of low-income households. Home Weatherization services may include:

- ✓ Windows
- ✓ Doors
- ✓ Water Heater
- ✓ Attic & Floor Insulation
- ✓ Thermostat
- ✓ Carbon Monoxide Alarm
- ✓ Furnace
- ✓ Porch Lamps
- & much more!

East Palo Alto resident, Mr. Abram submitted his application & received:

- ✓ 2 Dual Pane Windows
- ✓ Door
- ✓ 4 Smoke Alarms
- ✓ Programmable Thermostat
- ✓ Carbon Monoxide Alarm
- ✓ Microwave
- ✓ Hand Held Showerhead
- ✓ Hot Water Faucet Restrictors
- ✓ Torchiere Lamp
- ✓ Water heater repairs

Mr. Abram said:
"I heard about Central Coast Energy Services from my neighbor across the street who was also having his home weatherized. The **FREE** weatherization program will help me conserve energy and water and save me money with all the upgrades. This will make my life easier - I will have extra money in my pocket to help me get by. It is easy to apply. I would recommend this program to family, friends & neighbors!"

Weatherization work being completed on Mr. Abram's East Palo Alto home in July 2013.

You may also be eligible for a credit of up to \$306 on your PG&E bill!

Submit the enclosed forms with copies of:

- ✓ **PG&E BILL:** All pages of your most recent PG&E bill
- ✓ **INCOME:** Income documents for the last 30 days for all adults in the household

Gross monthly income cannot exceed the amount listed below:

1 person	2 persons	3 persons	4 persons	5 persons	6 persons	7 persons
\$1,996	\$2,611	\$3,225	\$3,840	\$4,454	\$5,069	\$5,184

1-888-728-3637

Central Coast Energy Services, Inc. is a 501(c)(3) not-for-profit organization and the service provider for the Home Energy Assistance Program (HEAP), the Home Weatherization Program, and PG&E CARE for low-income households in Santa Cruz, San Benito, Monterey, and San Mateo Counties. For more information visit: www.EnergyServices.org

CENTRAL COAST ENERGY SERVICES

LIHEAP Payment Assistance




Department of Community Services and Development Energy Intake Form CSD 43 (10/2017)				Official Use Only:	
Agency:				Priority Points	
Intake Initials:				A.C.C.	
Intake Date:				Eligibility Cert Date	
First name	Middle Initial	Last Name		Date of Birth MM/DD/YY	
SERVICE ADDRESS – Address where you live (this cannot be a P.O. Box)					
Service Address				Unit Number	
Service City		Service County		Service State	Service Zip Code
Have you lived at this residence during each of the past 12 months? <input type="checkbox"/> Yes <input type="checkbox"/> No					
Is your service address the same as mailing address?..... <input type="checkbox"/> Yes <input type="checkbox"/> No					
Mailing Address				Unit Number	
Mailing City		Mailing County		Mailing State	Mailing Zip Code
Social Security Number (SSN):		Telephone Number ()			
E-mail Address:					
PEOPLE LIVING IN HOUSEHOLD Enter the total number of people living in the household, including yourself →			INCOME Enter the total number of people who receive income →		
Demographics: Enter the number of people in the household who are:			Enter the total <u>gross</u> monthly income for <u>all</u> people living in the household:		
Ages 0 – 2 Years			TANF / CalWorks \$		
Ages 3 - 5 years			SSI / SSP \$		
Ages 6 - 18 years			SSA / SSDI \$		
Ages 19 - 59			Paycheck(s) \$		
Ages 60 and older			Interest \$		
Disabled			Pension \$		
Native American			Other \$		
Seasonal or Migrant Farmworker			Total Monthly Income \$		
HOUSEHOLD MEMBERS ENTER THE INFORMATION BELOW FOR <u>ALL</u> HOUSEHOLD MEMBERS. If you have more than 7 people in your household, please list the information on a separate piece of paper.					
First Name	Last Name	Relation to Applicant	Date of Birth MM/DD/YY	Amount of Gross Monthly Income (Before Taxes and Deductions)	Source of Income
		Self			
Household Total Monthly Gross Income				\$	
Are you or someone in your household CURRENTLY receiving CalFresh (Food Stamps)? <input type="checkbox"/> Yes <input type="checkbox"/> No					

UA Marketing from Wx'd Dwellings

A list of **weatherization customers not benefitted for payment assistance** under the current program year.

The list is generated from open weatherization jobs within the last 180days.

Local Solutions for California

Welcome 60407JBasra ! [Log Out]

Weatherization

Dwelling/Job Search

Scheduling


- Open Jobs List
- Appointment Schedule

Crew Time Entry

Weatherization Marketing

- UA Marketing from Weatherization

Weatherization Admin

 UA Marketing from Weatherized Dwellings

Refresh List

Export List

Drag a column header here to group by that column

Dwelling ID	Name	Best Time to Call	Phone	Mailing Address	Mail City
7048	JANICE SMITH	MORN	831 7284096	2030 PAJARO LN APT 1301	FREEDOM
8248	ABEL RUIZ	MORN	831 7941538	10701 DAVIS ST	CASTROVILLE
8359	LEONEL GARCIA SANCHEZ	MORN	831 7615840	PO BOX 537	FREEDOM
8479	MARIA HERNANDEZ		831 8548814	2030 PAJARO LN APT 3105	FREEDOM

Weatherization> UA Marketing from Weatherization Jobs Completed

LIHEAP Weatherization



STATE OF CALIFORNIA
DEPARTMENT OF COMMUNITY SERVICES AND DEVELOPMENT
CSD 515A (Rev. 2/12/16)

ENERGY SERVICE AGREEMENT FOR OCCUPANT

11. I understand that the Property Owner cannot raise the rent of the unit for a period of two years from the date of weatherization because of the increased value of the unit due solely to weatherization measures provided by the Contractor/Agency (allowable factors for rent increase include an actual increase in property taxes, actual cost of amortizing other improvements to the property accomplished after the date of work completed by the Contractor/Agency, or actual increases in expenses of maintaining and operating this property).
12. I acknowledge that I have been provided a copy of this Agreement explaining its terms effective for a two year period after weatherization services have been completed. Complaint Process: In the event the provisions of this Agreement related to increased rent or the landlord's failure to decrease utility costs for master metered units are not met, tenants may contact the Contractor/Agency to submit a verbal or written complaint, which will be investigated by the Department of Community Services and Development. Contractor/Agency contact information is located on this Agreement under the section entitled, "Contractor/Agency Assurance."
13. I may retain the replacement energy conservation measure installed by the CSD weatherization program(s) if the replaced appliance was my personal property.

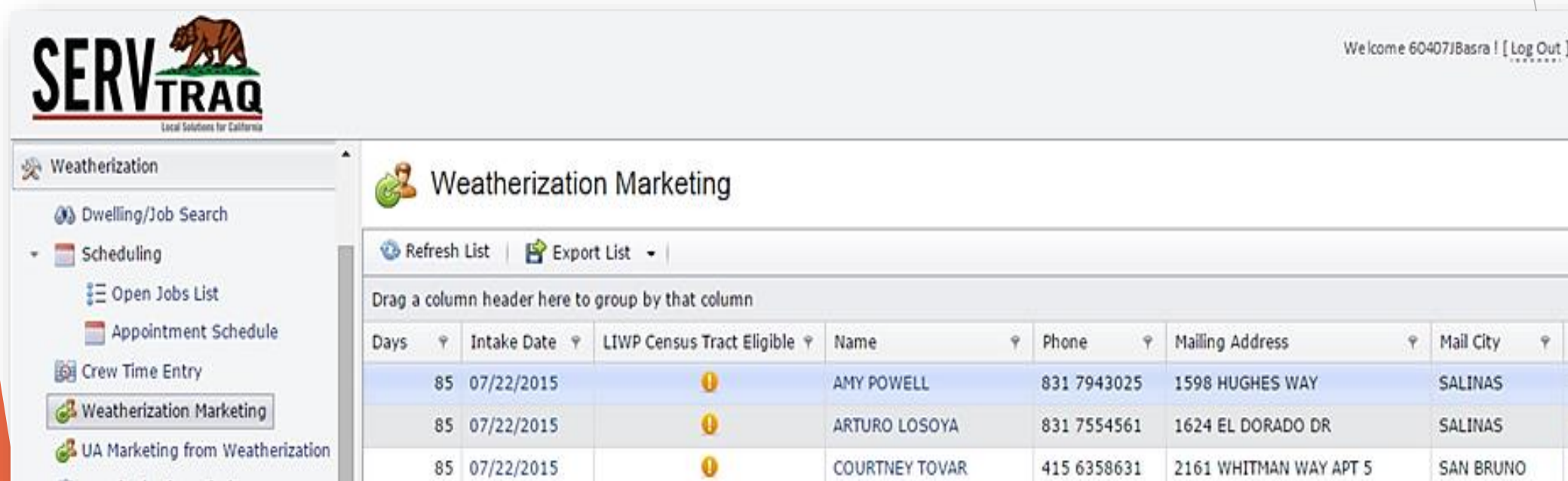
I CERTIFY THAT I am the Owner-Occupant or Tenant residing in the dwelling listed above that serves as my primary residence and that all given statements are true and correct to the best of my knowledge. I have read and understand these TERMS and RELEASE, and agree to be bound by all of its terms and conditions in order to receive weatherization services under the CSD weatherization program(s).

Owner-Occupant or Tenant's Signature			Date	
Contractor/Agency Assurance				
Contractor/Agency (Print name)			Address	
CSLB Number (if applicable)	City	ZIP Code	Contractor/Agency Telephone Number	
Contractor/Agency Email Address			Contractor/Agency FAX Number	
<i>The Contractor/Agency agrees to the following:</i>				
1. Shall be responsible for the feasible cost of weatherization measures performed other than cash contribution from the Owner or Owner Agent, if applicable, and any subsequent non-compliance.				
2. Shall ensure that the Contractor/Agency is properly insured.				
3. Shall ensure that work is conducted in a professional manner and meets program and building code standards.				
4. Shall not make any significant structural changes to the dwelling without requesting written permission specifically describing the change from the dwelling owner.				
5. Shall provide in writing a list of all weatherization measures installed in the unit.				
6. Shall assure that the owner, or owner's agent, and tenant data shall be maintained in a confidential manner to assure compliance with the Information Practices Act of 1977, as amended, and the Federal Privacy Act of 1974, as amended.				
Agency Program Manager's Signature			Agency Program Manager's Name (Print name)	Date

WX Marketing

A list of **eligible payment assistance customers** linked to **dwellings not previously weatherized** by your agency.

Records display after the 14th of UA application entry date and drop off after the 85th day.

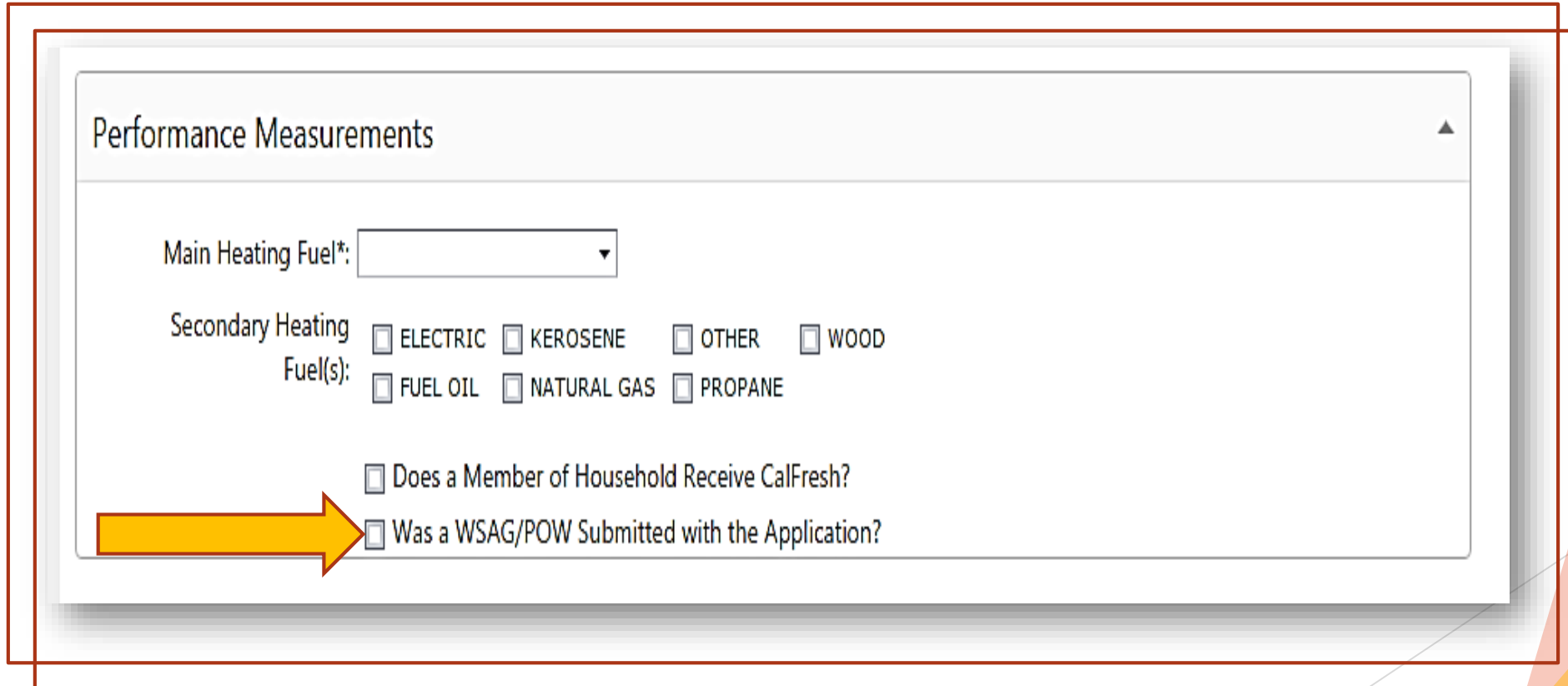


The screenshot shows the SERV TRAQ web application interface. The top header includes the SERV TRAQ logo with a bear icon and the text "Local Solutions for California". On the right, it says "Welcome 60407JBasra ! [Log Out]". The left sidebar contains a menu with options: Weatherization, Dwelling/Job Search, Scheduling (expanded), Open Jobs List, Appointment Schedule, Crew Time Entry, Weatherization Marketing (highlighted), and UA Marketing from Weatherization. The main content area is titled "Weatherization Marketing" and includes "Refresh List" and "Export List" buttons. Below these is a table with columns: Days, Intake Date, LIWP Census Tract Eligible, Name, Phone, Mailing Address, and Mail City. The table contains three rows of data, all with "85" in the Days column and "07/22/2015" in the Intake Date column. Each row has a yellow warning icon in the LIWP Census Tract Eligible column.

Days	Intake Date	LIWP Census Tract Eligible	Name	Phone	Mailing Address	Mail City
85	07/22/2015	⚠	AMY POWELL	831 7943025	1598 HUGHES WAY	SALINAS
85	07/22/2015	⚠	ARTURO LOSOYA	831 7554561	1624 EL DORADO DR	SALINAS
85	07/22/2015	⚠	COURTNEY TOVAR	415 6358631	2161 WHITMAN WAY APT 5	SAN BRUNO

Weatherization> Weatherization Marketing

The **Wx Marketing** feature is contingent on the “**WSAG/POW submitted?**” checkbox located in the **UA Data Entry** module.



The screenshot displays the 'Performance Measurements' section of a web form. It includes a dropdown menu for 'Main Heating Fuel*', a group of checkboxes for 'Secondary Heating Fuel(s)' (ELECTRIC, KEROSENE, OTHER, WOOD, FUEL OIL, NATURAL GAS, PROPANE), and two checkboxes at the bottom. A large red arrow points to the checkbox labeled 'Was a WSAG/POW Submitted with the Application?'. The entire form area is enclosed in a red rectangular border.

Performance Measurements ▲

Main Heating Fuel*:

Secondary Heating Fuel(s): ☐ ELECTRIC ☐ KEROSENE ☐ OTHER ☐ WOOD
☐ FUEL OIL ☐ NATURAL GAS ☐ PROPANE

☐ Does a Member of Household Receive CalFresh?

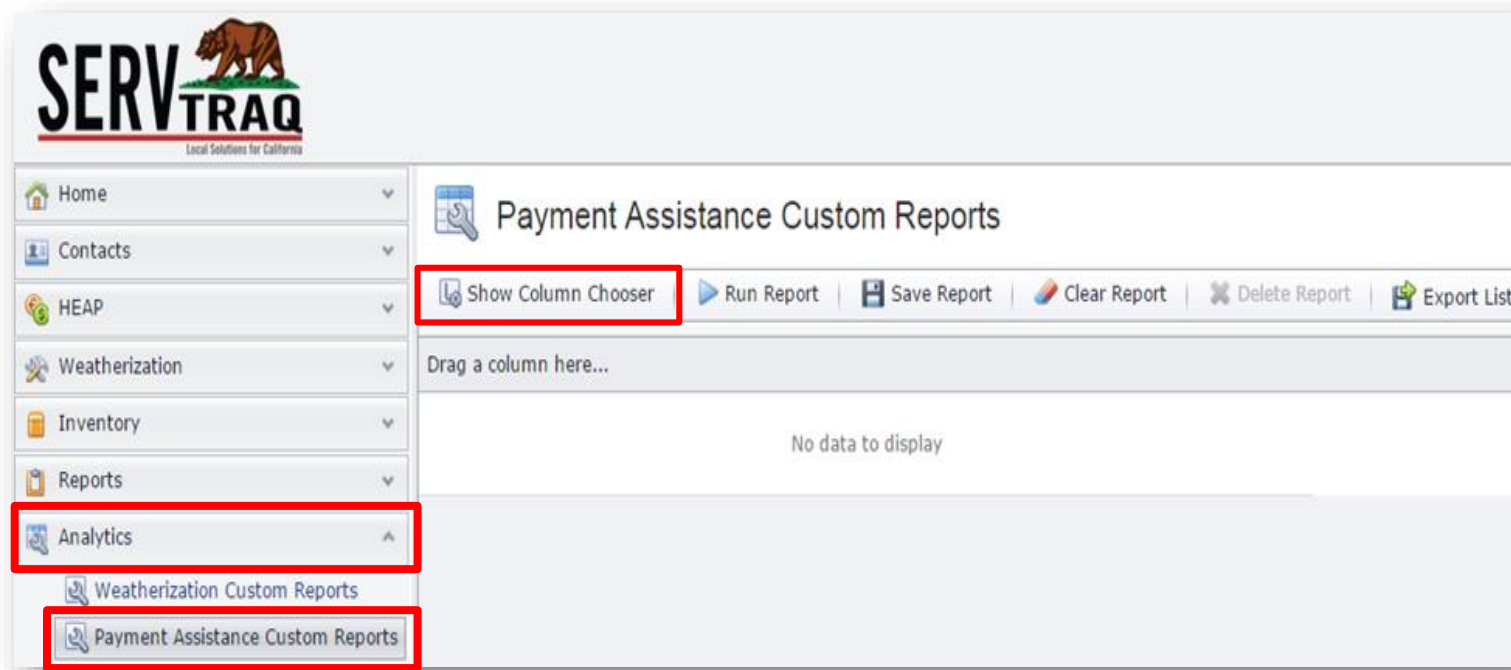
☐ Was a WSAG/POW Submitted with the Application?

Custom UA Reports

Custom Reports

Payment Assistant Custom Reports allow user to create *specific report* using the output fields and filters available.

For example: Reaching out to previous year benefitted customers not currently benefitted for the current program year.



Analytics > Payment Assistance Custom Reports > Show Column Chooser






Next Steps

- M&O Phone Calls
- Mail Individual Applications
- Mail Bulk Applications (Mass Mailer)

M&O Phone Calls

Use the Contact Entry feature in ServTraq to log your Marketing & Outreach **phone calls**.

Contacts



	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date	
Contact Date:	<input type="text" value="2/20/2018 10:03:29 AM"/>	Contact Type:	<input type="text" value="OUTGOING"/>	Contact Action:	<input type="text" value="PROGRAM/APPLICATION INFO GIVEN"/>	Call Code:	<input type="text" value="NO ACTION REQ - RECORD ONLY"/>	Notes:	<input type="text" value=""/>
Language:	<input type="text" value="ENGLISH"/>	Mailing Code:							
<div></div>									
  	10/18/2013	OUTGOING	PROGRAM/APPLICATION INFO GIVEN	NO ACTION REQ - RECORD ONLY	ENGLISH	ADDED FROM APPLICATION ENTRY	AS - ASSURANCE 16 + (WITH) WSAG - (W/O)CARE	4/4/2014	




Mail Individual Applications

Use the Contact Entry feature in ServTraq to generate a mailing **label or envelope** for an **HEAP/Wx application** to be mailed.

Contacts

	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
Contact Date:	2/20/2018 11:32:37 AM	Contact Type:	OUTGOING	Call Code:	MARKETING/OUTREACH	Notes:		
Contact Action:	PROGRAM/APPLICATION INFO GIVEN							
Language:	ENGLISH							
Mailing Code:	AP - FIRST TIME(HEAP APPLICATION) WITH INSTRUCTIC							



  	12/20/2017	OUTGOING	PG&E COMMITMENT PLACED	NO ACTION REQ - RECORD ONLY	ENGLISH	\$764 FT PLEDGE		
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Mail Merge for Mass Mailer

Send “Bulk” Mail

Generate Labels, Envelopes,
Emails from an Excel List

	A	B	C	D	E
1	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040
2	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040
3	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040
4	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040
5	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040
6	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040
7	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040
8	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040
9	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040
10	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040	Buddy Baker 200 Falcon Way Pleasantville, OH 38040

Online Tutorial Video: <https://www.youtube.com/watch?v=yr0szWDBJYo>

Questions/Comments

Support@ServTraq.com

(831) 761-1747