



# DAILY REPORTS WEBINAR

March 28, 2017

# OVERVIEW

## ➤ **Document Mail-Outs**

- Barcoded Applications
- Benefit and Denial Letters

## ➤ **Application Record Filing**

- Application ID

## ➤ **CORE Change Request to CSD**

- First Name, Last Name or SSN

## ➤ **Utility Pledge/Commitment Report**

- CARE Applications
- Commitments

# Barcoded Applications

**ServTraq(c) Barcoded Applications** are a replica of CSD 43 Form, they are used for the purpose of tracking the **receipt** of an application and **streamline compliance** with the **CSD 15 Day Notification requirement.**

The screenshot displays the SERVTRAQ web application interface. On the left is a sidebar menu with options: Home, Contacts, HEAP, Weatherization, Inventory, Reports, Daily Reports (expanded), File Labels, Barcoded Applications, Envelopes From Contacts, Mailing Labels From Contacts, HEAP Benefit Letters, HEAP Denial Letters, CSD Data Change Requests, Commitments to Send to Utility, CARE Applications to Send to Utility, Appointment Reminder Postcards, Crew Appointment Schedule, Weatherization Reports, Payment Assistance Reports, Inventory Reports, Analytics, and Administration. The main content area is titled 'Barcoded Applications from Contact Entry'. It includes a 'Report Parameters' section with dropdowns for 'Start Date' (3/1/2017) and 'End Date' (3/1/2017), a 'Printed?' checkbox, and a 'Return Address' dropdown (135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076). Below this is a 'Submit' button. A pagination bar shows 'Page 1 of 8' and a 'PDF' button. The form itself is titled 'Department of Community Services and Development' and 'Energy Intake Form CSD 43 (1/2016)'. It contains fields for 'Agency', 'Intake Initials', and 'Intake Date'. To the right is an 'Official Use Only' section with fields for 'Priority Points', 'A.C.C.', 'Eligibility Cert Date', and 'Job Control Code'. The main form fields include 'First Name', 'Middle Initial', 'Last Name', 'Date of Birth' (MM/DD/YY), 'Mailing Address', 'Unit Number', 'Mailing City', 'Mailing County', 'Mailing State', 'Mailing Zip Code', 'SERVICE ADDRESS - Address where applicant lives (this cannot be a P.O. Box)', 'Is your service address the same as mailing' (Yes/No), 'Have you lived at this residence during each of the past 12 months' (Yes/No), 'Service Address', 'Unit Number', 'Service City', 'Service County', 'Service State', and 'Service Zip Code'.

WELCOME 600

**SERVTRAQ**  
Local Solutions for California

Home  
Contacts  
HEAP  
Weatherization  
Inventory  
Reports  
Daily Reports  
File Labels  
Barcoded Applications  
Envelopes From Contacts  
Mailing Labels From Contacts  
HEAP Benefit Letters  
HEAP Denial Letters  
CSD Data Change Requests  
Commitments to Send to Utility  
CARE Applications to Send to Utility  
Appointment Reminder Postcards  
Crew Appointment Schedule  
Weatherization Reports  
Payment Assistance Reports  
Inventory Reports  
Analytics  
Administration

☒ Barcoded Applications from Contact Entry

Report Parameters

Start Date: 3/1/2017  
End Date: 3/1/2017  
Printed?: ☐  
Return Address: 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076

Submit

Page 1 of 8 PDF

Department of Community Services and Development  
Energy Intake Form  
CSD 43 (1/2016)

Agency: Intake Initials: Intake Date:

First Name Middle Initial Last Name Date of Birth  
MM/DD/YY

Mailing Address Unit Number

Mailing City Mailing County Mailing State Mailing Zip Code

SERVICE ADDRESS - Address where applicant lives (this cannot be a P.O. Box)  
Is your service address the same as mailing ☐ Yes ☐ No  
Have you lived at this residence during each of the past 12 months ☐ Yes ☐ No

Service Address Unit Number

Service City Service County Service State Service Zip Code

# Notification Letter Example



**Central Coast Energy Services**  
P.O. Box 2707  
Watsonville, CA 95077-2707  
1-888-728-3637

Dear Customer,

We have received your application for the Home Energy Assistance Program (HEAP). You will receive another notification by mail or e-mail to notify you of your program eligibility outcome. It can take as long as 6-8 weeks before your application is processed. In the meantime, please continue to make payments or contact your utility provider to make a payment arrangement.

Thank you,

Central Coast Energy Services

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Estimado Cliente,

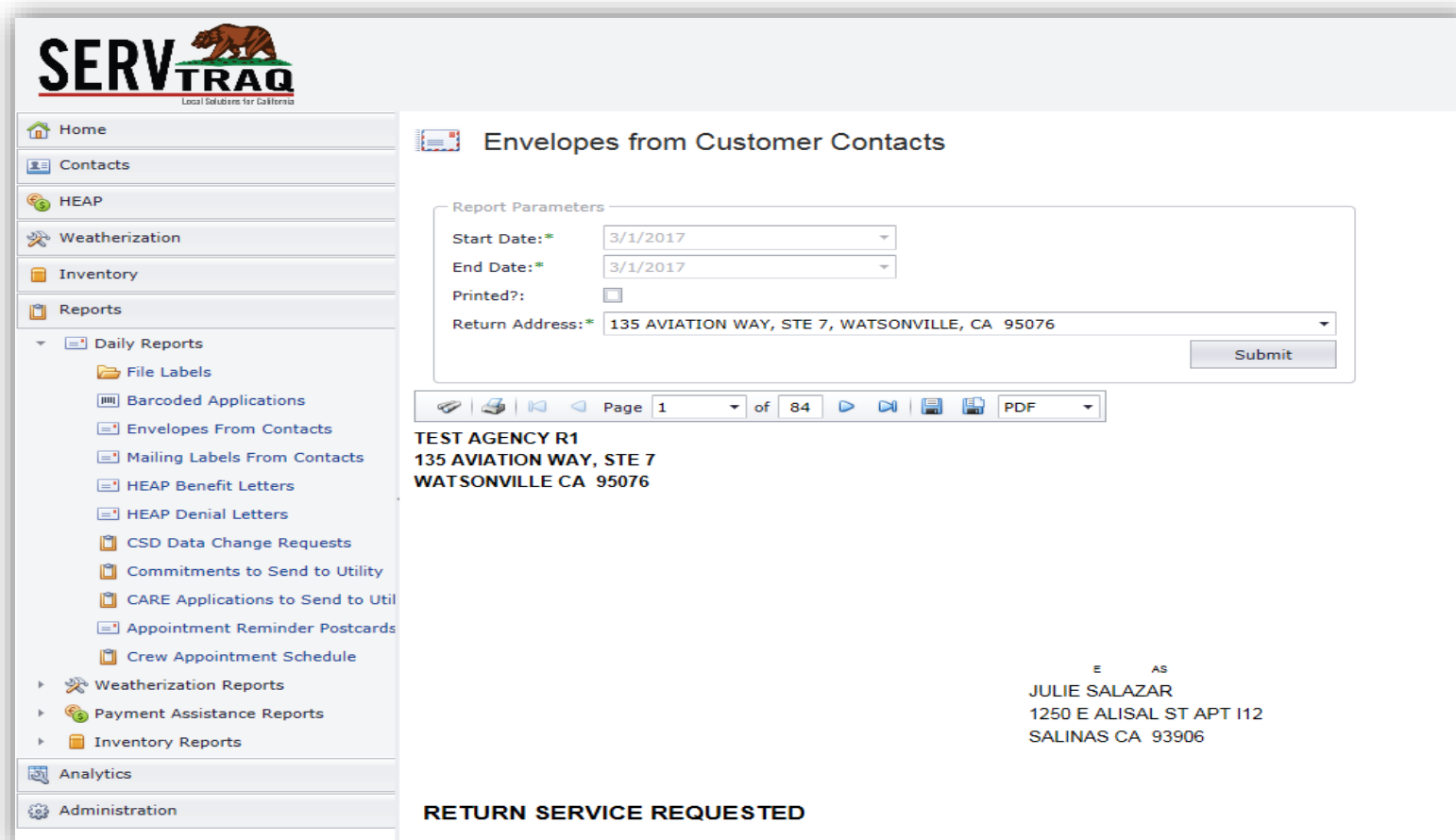
Hemos recibido su solicitud para el programa para asistencia con su bil de la luz (HEAP). Usted recibirá otra notificación por correo o correo electrónico (e-mail) cuando su solicitud sea procesada para informarle del resultado de su elegibilidad. Podría tomar hasta 6-8 semanas antes de que su aplicación sea procesada. Mientras tanto, usted debe continuar haciendo pagos o hacer arreglos de pago con su compañía de energía.

Gracias,

Central Coast Energy Services

# Envelopes From Contacts

**ServTraq can generate** a coded mail-out envelope with the customer's information and the Notification Letter Code **(NL)** for the purpose of including your agency's Notification Letter template.



The screenshot displays the SERVTRAQ web application interface. On the left is a navigation menu with the following items: Home, Contacts, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. The 'Reports' section is expanded, showing a list of report types including Daily Reports (File Labels, Barcoded Applications, Envelopes From Contacts, Mailing Labels From Contacts, HEAP Benefit Letters, HEAP Denial Letters, CSD Data Change Requests, Commitments to Send to Utility, CARE Applications to Send to Utility, Appointment Reminder Postcards, and Crew Appointment Schedule), Weatherization Reports, Payment Assistance Reports, and Inventory Reports. The main content area is titled 'Envelopes from Customer Contacts'. It features a 'Report Parameters' section with the following fields: 'Start Date:' (3/1/2017), 'End Date:' (3/1/2017), 'Printed?:' (checkbox), and 'Return Address: 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076'. A 'Submit' button is located to the right of the 'Return Address' field. Below the parameters section is a toolbar with icons for printing, saving, and other actions, along with a page indicator showing 'Page 1 of 84' and a 'PDF' download option. The report content displays the address: 'TEST AGENCY R1', '135 AVIATION WAY, STE 7', 'WATSONVILLE CA 95076'. To the right of this address, the return address is listed: 'E AS', 'JULIE SALAZAR', '1250 E ALISAL ST APT I12', 'SALINAS CA 93906'. At the bottom of the page, the text 'RETURN SERVICE REQUESTED' is visible.

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Local Solutions for California

Home  
Contacts  
HEAP  
Weatherization  
Inventory  
Reports  
Daily Reports  
File Labels  
Barcoded Applications  
Envelopes From Contacts  
Mailing Labels From Contacts  
HEAP Benefit Letters  
HEAP Denial Letters  
CSD Data Change Requests  
Commitments to Send to Utility  
CARE Applications to Send to Utility  
Appointment Reminder Postcards  
Crew Appointment Schedule  
Weatherization Reports  
Payment Assistance Reports  
Inventory Reports  
Analytics  
Administration

**Envelopes from Customer Contacts**

Report Parameters

Start Date: 3/1/2017  
End Date: 3/1/2017  
Printed?: ☐  
Return Address: 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076

Submit

Page 1 of 84 PDF

TEST AGENCY R1  
135 AVIATION WAY, STE 7  
WATSONVILLE CA 95076

E AS  
JULIE SALAZAR  
1250 E ALISAL ST APT I12  
SALINAS CA 93906

**RETURN SERVICE REQUESTED**



# Mailing Labels From Contacts

**Mailing labels** are also **available** instead of Mail-Out Envelopes.

The screenshot displays the SERVTRAQ web application interface. On the left is a navigation menu with options: Home, Contacts, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. The 'Reports' section is expanded, showing sub-options like 'Daily Reports', 'File Labels', 'Barcoded Applications', 'Envelopes From Contacts', 'Mailing Labels From Contacts' (which is selected), 'HEAP Benefit Letters', 'HEAP Denial Letters', 'CSD Data Change Requests', 'Commitments to Send to Utility', 'CARE Applications to Send to Utility', 'Appointment Reminder Postcards', 'Crew Appointment Schedule', 'Weatherization Reports', 'Payment Assistance Reports', and 'Inventory Reports'.

The main content area is titled 'Mailing Labels from Customer Contacts'. It features a 'Report Parameters' section with the following fields: 'Start Date:' (3/1/2017), 'End Date:' (3/1/2017), 'Printed?:' (checkbox), and 'Return Address: 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076'. A 'Submit' button is located to the right of the 'Return Address' field.

Below the parameters is a pagination bar showing 'Page 1 of 3' and a 'PDF' button. The main data area displays a grid of mailing labels for three customers, each with a name, address, and zip code, preceded by a two-letter code (AS, E, or AT).

Customer	Label Code	Address	Zip
JULIE SALAZAR	AS	1250 E ALISAL ST APT I12	93906
	E		
KATHIE STEED	AS	8233 MESSICK RD	93907
	E		
KATHIE STEED	AS	8233 MESSICK RD	93907
	E		
MARIA MENDOZA	AS	540 13TH AVE UNIT 9	95062
	E		
SAUL SANTOS	AS	1144 N SANBORN RD APT K	93905
	S		
GREGORIO PUENTES	AS	24830 CALLE EL ROSARIO	93908
	S		
JUAN GARCIA	AT	43 PLAZA CIR APT 12	93901
	E		
GLADYS ROJAS	AT	123 S MAIN ST	93901
	E		
GLADYS MENDOZA	AT	1455 LAUREL DR	93905
	E		
JULIE LOPEZ	AT	12 MAIN RD	93906
	E		
ROSA BLANCO	AT	909 PROVINCETOWN CT	93906
	E		
GLADYS MENDOZA	AT	911 LAUREL DR	93906
	E		

# CSD Data Change Requests

ServTraq offers a **CSD Data Change Request** form that automates the process of requesting a **Name/SSN** change in **CORE** while preserving an electronic record in the database. This form is an **acceptable** equivalent to CSD's.

The screenshot shows the SERVTRAQ web application interface. On the left is a navigation menu with options like Home, Contacts, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. The 'Reports' section is expanded, showing various report types including 'CSD Data Change Requests'. The main content area is titled 'CSD Data Change Requests' and contains a 'Report Parameters' section with fields for 'Start Date', 'End Date', 'Printed?', and 'Agency Phone Number'. Below this is a 'Submit' button. A toolbar at the bottom of the form area includes icons for printing, saving, and generating a PDF. The form content includes a fax instruction block and two data change request tables.

**Report Parameters**

Start Date: 3/1/2017  
End Date: 3/1/2017  
Printed?: ☐  
Agency Phone Number: (831) 761-7080  
Submit

Page 1 of 1 PDF

**FAX TO: CSD HELP DESK**  
**FROM: 60000 - TEST AGENCY R1**  
**Phone: (831) 761-7080**  
**Fax: (831) 728-0535**  
Page 1 of 1

**CSD Data Change Request**

For Customer SSN 354-35-4030

Field	Old Value	Correct Value	Req Note
Last Name	CARRILLO	SMITH	MARRIED
Correction Complete Date: _____ by: _____ (CSD) Application Marked for Entry by: _____			

For Customer SSN 658-74-5874

Field	Old Value	Correct Value	Req Note
First Name	AMONDA	AMANDA	
Correction Complete Date: _____ by: _____ (CSD) Application Marked for Entry by: _____			

## CSD Data Change Request includes:

- Agency Name
- Agency Phone Number and Fax Number
- Customer's SSN
- Information to be Updated
- Change Request Explanation
- Requester Name

**FAX TO: CSD HELP DESK**

**FROM: 60000 - TEST AGENCY R1**

**Phone: (831) 761-7080**

**Fax: (831) 728-0535**

*Page 1 of 1*

### CSD Data Change Request

For Customer SSN **555-22-1524**

Field	Old Value	Correct Value	Req Note
Last Name	DOWNS	GREY	CUSTOMER GOT MARRIED THIS YE
Correction Complete Date: _____ by: _____ (CSD) Application Marked for Entry by: _____			

For Customer SSN **354-35-4030**

Field	Old Value	Correct Value	Req Note
Last Name	CARRILLO	SMITH	MARRIED
Correction Complete Date: _____ by: _____ (CSD) Application Marked for Entry by: _____			

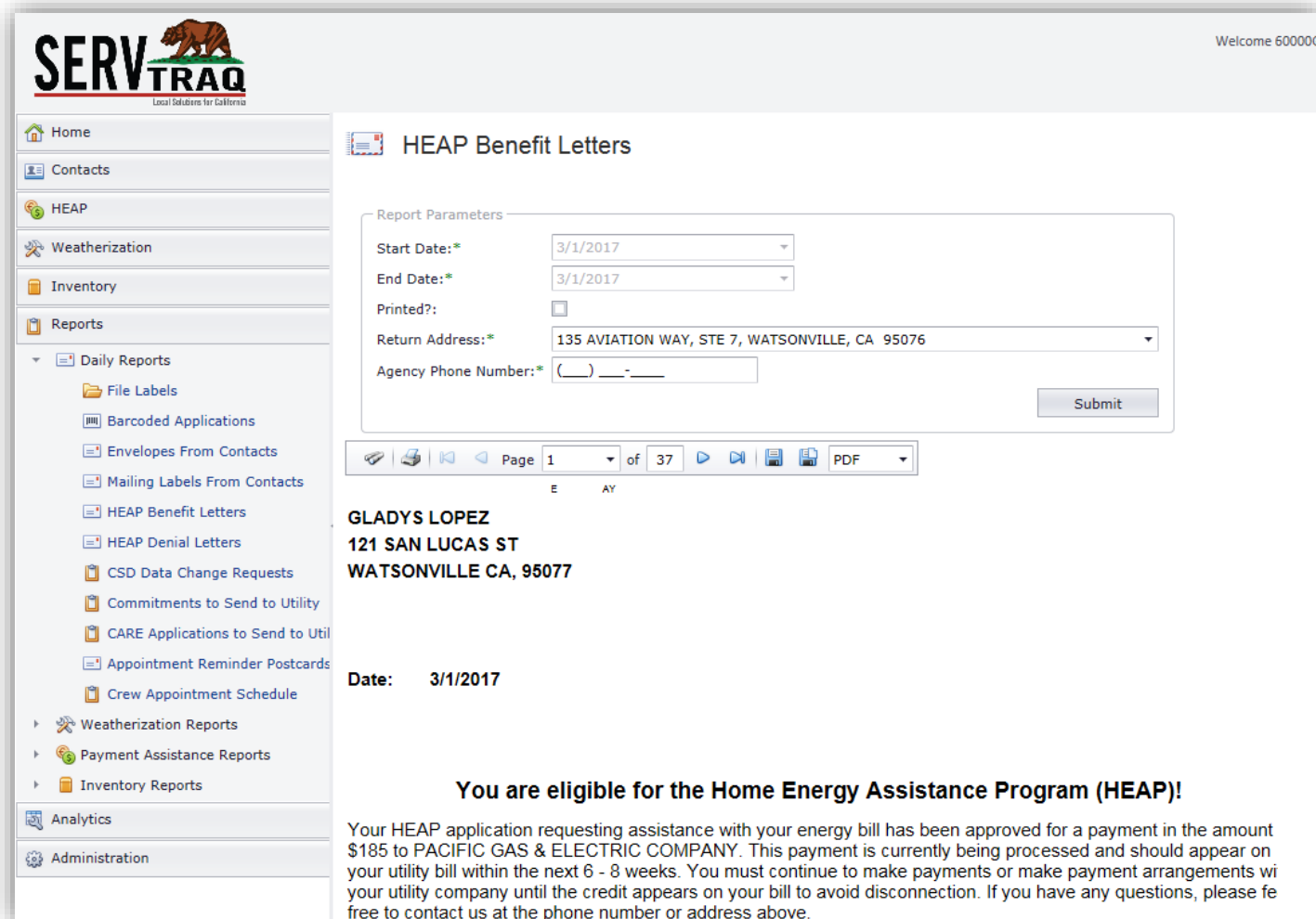
For Customer SSN **658-74-5874**

Field	Old Value	Correct Value	Req Note
First Name	AMONDA	AMANDA	
Correction Complete Date: _____ by: _____ (CSD) Application Marked for Entry by: _____			



# HEAP Benefit Letters

**ServTraq(c) HEAP Benefit Letter** are standardized notification letters when a Payment Assistance Application is **eligible** and transferred to CORE.



The screenshot displays the SERVTRAQ web application interface. The top header features the SERVTRAQ logo with a bear icon and the tagline "Local Solutions for California". A user greeting "Welcome 600000" is visible in the top right corner. The left sidebar contains a navigation menu with options: Home, Contacts, HEAP, Weatherization, Inventory, and Reports. The Reports section is expanded, showing a list of report types including Daily Reports (File Labels, Barcoded Applications, Envelopes From Contacts, Mailing Labels From Contacts, HEAP Benefit Letters, HEAP Denial Letters, CSD Data Change Requests, Commitments to Send to Utility, CARE Applications to Send to Utility, Appointment Reminder Postcards, Crew Appointment Schedule), Weatherization Reports, Payment Assistance Reports, and Inventory Reports. The main content area is titled "HEAP Benefit Letters" and contains a "Report Parameters" form. The form includes fields for Start Date (3/1/2017), End Date (3/1/2017), Printed? (checkbox), Return Address (135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076), and Agency Phone Number. A "Submit" button is located at the bottom right of the form. Below the form is a pagination bar showing "Page 1 of 37" and a "PDF" download option. The report content displays the name "GLADYS LOPEZ" and address "121 SAN LUCAS ST, WATSONVILLE CA, 95077". The date "Date: 3/1/2017" is also shown. The report text states: "You are eligible for the Home Energy Assistance Program (HEAP)! Your HEAP application requesting assistance with your energy bill has been approved for a payment in the amount \$185 to PACIFIC GAS & ELECTRIC COMPANY. This payment is currently being processed and should appear on your utility bill within the next 6 - 8 weeks. You must continue to make payments or make payment arrangements with your utility company until the credit appears on your bill to avoid disconnection. If you have any questions, please feel free to contact us at the phone number or address above."

**SERVTRAQ**  
Local Solutions for California

Welcome 600000

Home  
Contacts  
HEAP  
Weatherization  
Inventory  
Reports

▼ Daily Reports

- File Labels
- Barcoded Applications
- Envelopes From Contacts
- Mailing Labels From Contacts
- HEAP Benefit Letters
- HEAP Denial Letters
- CSD Data Change Requests
- Commitments to Send to Utility
- CARE Applications to Send to Utility
- Appointment Reminder Postcards
- Crew Appointment Schedule

► Weatherization Reports

► Payment Assistance Reports

► Inventory Reports

Analytics  
Administration

## HEAP Benefit Letters

Report Parameters

Start Date:\* 3/1/2017

End Date:\* 3/1/2017

Printed?: ☐

Return Address:\* 135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076

Agency Phone Number:\* ( ) -

Submit

Page 1 of 37 PDF

E AY

**GLADYS LOPEZ**  
**121 SAN LUCAS ST**  
**WATSONVILLE CA, 95077**

**Date: 3/1/2017**

**You are eligible for the Home Energy Assistance Program (HEAP)!**

Your HEAP application requesting assistance with your energy bill has been approved for a payment in the amount \$185 to PACIFIC GAS & ELECTRIC COMPANY. This payment is currently being processed and should appear on your utility bill within the next 6 - 8 weeks. You must continue to make payments or make payment arrangements with your utility company until the credit appears on your bill to avoid disconnection. If you have any questions, please feel free to contact us at the phone number or address above.

## Benefit Letter include:

- Agency Name and Address
- Customers Name and Mailing Address
- Date the Letter is printed
- Payment amount
- Utility Company Benefitted
- Approximate time the payment takes to process and credit the account.
- Available in English or Spanish

TEST AGENCY R1  
135 AVIATION WAY, STE 7  
WATSONVILLE CA, 95076

E AY  
GLADYS LOPEZ  
121 SAN LUCAS ST  
WATSONVILLE CA, 95077

Date: 3/14/2017

### **You are eligible for the Home Energy Assistance Program (HEAP)!**

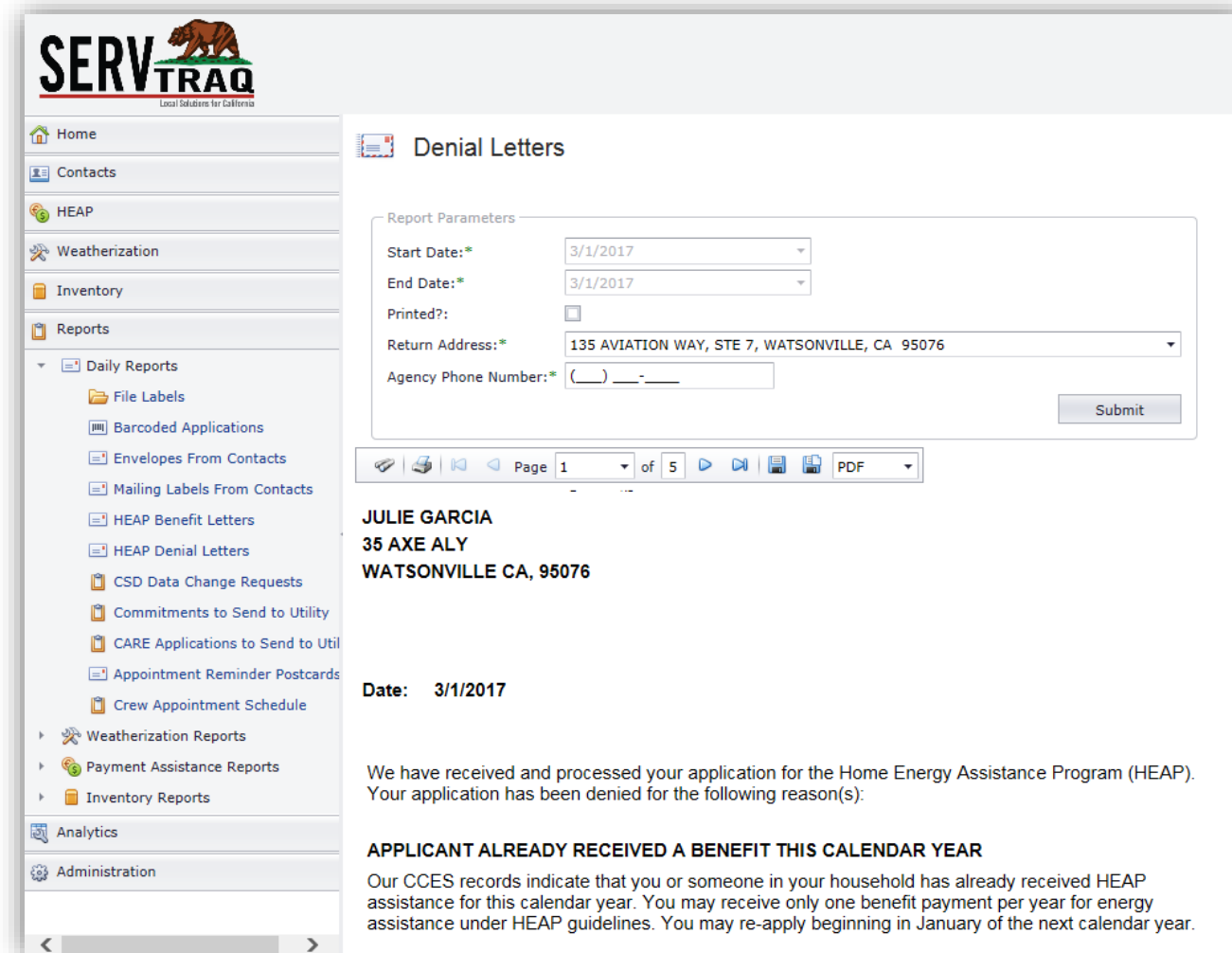
Your HEAP application requesting assistance with your energy bill has been approved for a payment in the amount of \$185 to PACIFIC GAS & ELECTRIC COMPANY. This payment is currently being processed and should appear on your utility bill within the next 6 - 8 weeks. You must continue to make payments or make payment arrangements with your utility company until the credit appears on your bill to avoid disconnection. If you have any questions, please feel free to contact us at the phone number or address above.

Thanks,

TEST AGENCY R1

# HEAP Denial Letters

**ServTraq(c) HEAP Benefit Letter** are standardized notification letter for customer who are determine **denied** for LIHEAP Payment Assistance.



The screenshot displays the ServTraq web application interface. On the left is a navigation menu with options: Home, Contacts, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. The 'Reports' section is expanded, showing a list of report types including Daily Reports, File Labels, Barcoded Applications, Envelopes From Contacts, Mailing Labels From Contacts, HEAP Benefit Letters, HEAP Denial Letters, CSD Data Change Requests, Commitments to Send to Utility, CARE Applications to Send to Utility, Appointment Reminder Postcards, Crew Appointment Schedule, Weatherization Reports, Payment Assistance Reports, and Inventory Reports. The 'HEAP Denial Letters' option is selected.

The main content area is titled 'Denial Letters'. It features a 'Report Parameters' section with the following fields: Start Date (3/1/2017), End Date (3/1/2017), Printed? (checkbox), Return Address (135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076), and Agency Phone Number. A 'Submit' button is located at the bottom right of this section.

Below the report parameters is a pagination bar showing 'Page 1 of 5' and a 'PDF' button.

The denial letter content is as follows:

**JULIE GARCIA**  
**35 AXE ALY**  
**WATSONVILLE CA, 95076**

**Date: 3/1/2017**

We have received and processed your application for the Home Energy Assistance Program (HEAP). Your application has been denied for the following reason(s):

**APPLICANT ALREADY RECEIVED A BENEFIT THIS CALENDAR YEAR**

Our CCES records indicate that you or someone in your household has already received HEAP assistance for this calendar year. You may receive only one benefit payment per year for energy assistance under HEAP guidelines. You may re-apply beginning in January of the next calendar year.

## Denial Letter include the following information:

- Agency Name and Address
- Customers Name and Mailing Address
- Notice Date
- Denial Reason
- Appeal Disclosure Statement

TEST AGENCY R1  
135 AVIATION WAY, STE 7  
WATSONVILLE CA, 95076

E NL  
TOTES MC GOATS  
200 N MAIN ST  
SALINAS CA, 93901

Date: 3/14/2017

We have received and processed your application for the Home Energy Assistance Program (HEAP). Your application has been denied for the following reason(s):

### **SOCIAL SECURITY NUMBER NOT VALID**

The Social Security number you provided is invalid, different than a previously submitted application in your name, or is a social security number that according to our records belongs to someone else.

Due to the overwhelming demand and the limited funding resources available for assistance the State of California requires Local Service Providers (agencies) to establish a priority plan. The priority plan provides a method for serving those with the greatest need. However, if your circumstances change, please feel free to reapply.

If you disagree with this decision and/or you have additional proof that may establish your eligibility, you have 30 days from the date of this letter to submit the information or your application will be closed. All proof must be current to within 30 days from the date of this letter. If you will be submitting additional information, you must sign below and return your documents with this letter to the address listed above. If you have any questions you may contact us at the number listed above. Failure to provide the requested information will result in further delay or denial of your application.

The information supplied here and on my HEAP application is true and correct. Permission is given to use this information to establish eligibility.

Signature of Applicant or Legal Guardian \_\_\_\_\_ Date \_\_\_\_\_

# File Labels

**ServTraq(c) File Labels** provides agencies the ability to file Payment Assistance Applications by **Application ID Number**.

The screenshot displays the ServTraq web application interface. The top header includes the ServTraq logo with the tagline 'Local Solutions for California' and a user welcome message 'Welcome 60000GRc'. A left-hand navigation menu lists various system functions: Home, Contacts, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. The 'Reports' section is expanded, showing options like Daily Reports, File Labels, Barcoded Applications, and others. The main content area is titled 'File Labels from Application Entry' and features a 'Report Parameters' section with dropdown menus for 'Start Date' and 'End Date' (both set to 3/1/2017) and a 'Printed?' checkbox. Below this is a 'Submit' button. A pagination bar indicates 'Page 1 of 4' with navigation icons. The report data is presented in a table with three columns, showing application details for various individuals. Each entry includes an application ID, year, status, and outcome, followed by the applicant's name, address, and phone number.

Application ID	Year	Status	Outcome	Applicant Name	Address	Phone Number
119060	2016	BENEFITTED	FT	SALAZAR, JULIE	1250 E ALISAL ST APT 112 SALINAS CA 93906	(831) 262-4039
119061	2016	BENEFITTED	HE	LOPEZ, JULIE	12 MAIN RD SALINAS CA 93906	(831) 758-5587
119062	2016	BENEFITTED	FT	GARCIA, DELFINA	174 ANNA ST WATSONVILLE CA 95076	(831) 254-4457
119063	2016	BENEFITTED	HE	SORTELO, JULIE	1659 MADRID ST APT 12 SALINAS CA 93906	(831) 613-6845
119064	2016	BENEFITTED	HE	ROJAS, GLADYS	123 S MAIN ST SALINAS CA 93901	(831) 456-7894
119065	2015	BENEFITTED	FT	MENDOZA, GLADYS	1455 LAUREL DR SALINAS CA 93905	(831) 222-4455
119066	2015	BENEFITTED	HE	ROJAS, GLADYS	123 S MAIN ST SALINAS CA 93901	(831) 456-7894
119067	2015	BENEFITTED	HE	MENDOZA, GLADYS	911 LAUREL DR SALINAS CA 93906	(831) 222-5235
119068	2016	DENIED	HE	ORTIZ, LUPE	12 MAIN ST SALINAS CA 93901	(831) 722-0434
119072	2016	BENEFITTED	HW	PUENTES, GREGORIO B	24830 CALLE EL ROSARIO SALINAS CA 93908	(831) 751-6356
119073	2016	BENEFITTED	FT	ALFARO, JAIME	24 GARDEN LN DALY CITY CA 94015	(650) 630-4760
119074	2016	BENEFITTED	HE	BLANCO, ROSA	909 PROVINCETOWN CT SALINAS CA 93906	(831) 222-3344
119075	2016	BENEFITTED	HE	RODRIGUEZ, PERLA	24 MAIN ST	
119076	2016	BENEFITTED	EW	DE HOYOS, ADAM B	24 MAIN ST	
119077	2016	DENIED	HE	KIRBY, JACK	24 MAIN ST	

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## Label Information:

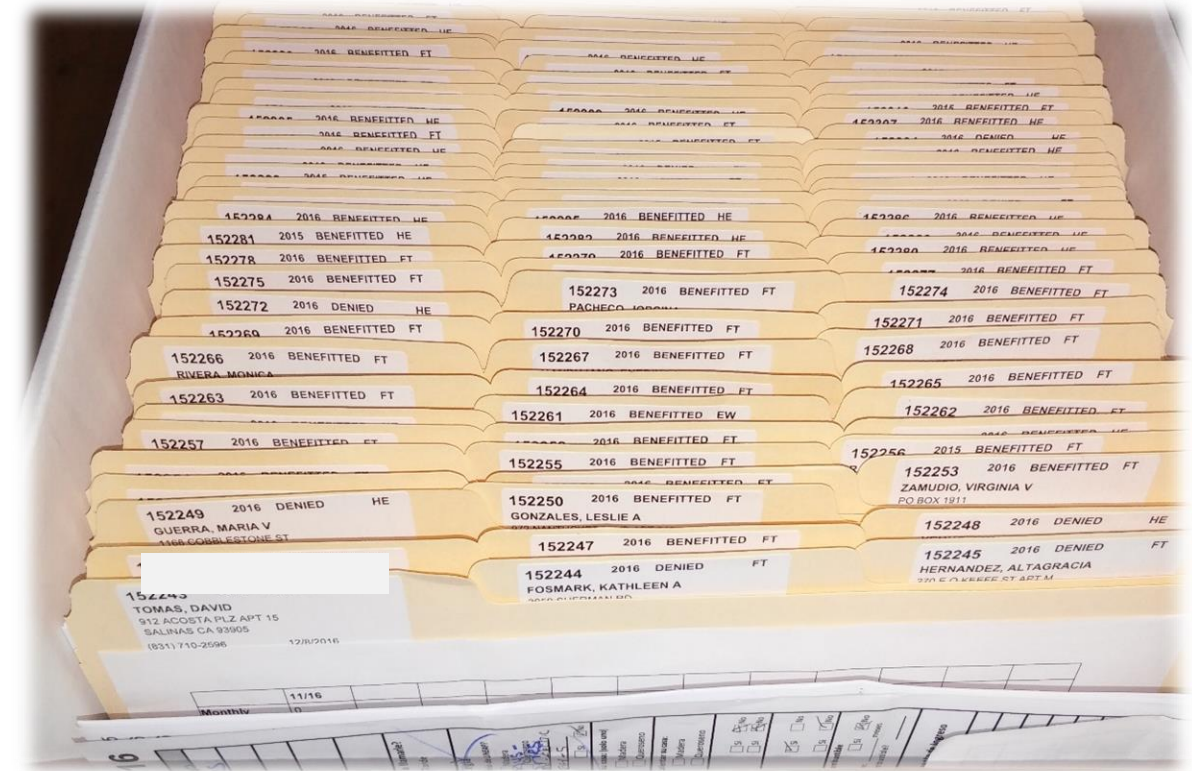
- Application ID# / ACC# (Agency control Code)
- Program, Program Year and Status (Eligible/Denied)
- Customers Name and Mailing Address
- Applicant Phone Number
- Certification Date

**119061    2016    BENEFITTED    HE**  
**LOPEZ, JULIE**  
12 MAIN RD  
SALINAS CA 93906  
(831) 758-5587                      7/12/2016






# APPLICATION RECORD FILING EXAMPLE:



# Commitments to Send to Utility

**ServTraq(c) Commitments to Sent to Utility Report** allows users to send Commitment/Pledge request to a utility company in batch.

**SERV****TRAQ**  
Local Solutions for California

Home

Contacts

HEAP

Weatherization

Inventory

Reports

Daily Reports

Weatherization Reports

Payment Assistance Reports

Inventory Reports

Analytics

Administration

Welcome 6000

Commitments to Fax

Report Parameters

Start Date:\*

3/13/2017

End Date:\*

3/13/2017

Printed?:

☐

Return Address:\*

135 AVIATION WAY, STE 7, WATSONVILLE, CA 95076

Agency Phone Number:\*

(831) 761-7080

Utility:\*

THE GAS COMPANY (SOCAL GAS)

Submit

Page 1 of 1

PDF

To: THE GAS COMPANY (SOCAL GAS)

From: TEST AGENCY R1

135 AVIATION WAY, STE 7 WATSONVILLE CA 95076

Phone: 8317617080 Fax: 8317280535

COMMITMENTS FOR ELIGIBLE LIHEAP APPLICANT ACCOUNTS

Acct Num	Account Name	Ben Amt	Prog	Phone	Contact	Commitment Notes
30375416820	MARIA ABARCA	\$246.00	HE	831 4666428	GLADYS ROJAS	PLEDGE PLACED ON CUSTOMERS A

## Commitment Report includes the following:

- ✓ Name of the Utility Company
- ✓ Agency Name, Address, Office & Fax Number
- ✓ Applicant Pledge/Commitment Report:
  - Utility Account Number
  - Account Name
  - Program and Benefit Amount
  - Customer Phone Number
  - Employee Name
  - Notes

To: PACIFIC GAS & ELECTRIC COMPANY

From: TEST AGENCY R1

135 AVIATION WAY, STE 7 WATSONVILLE CA 95076

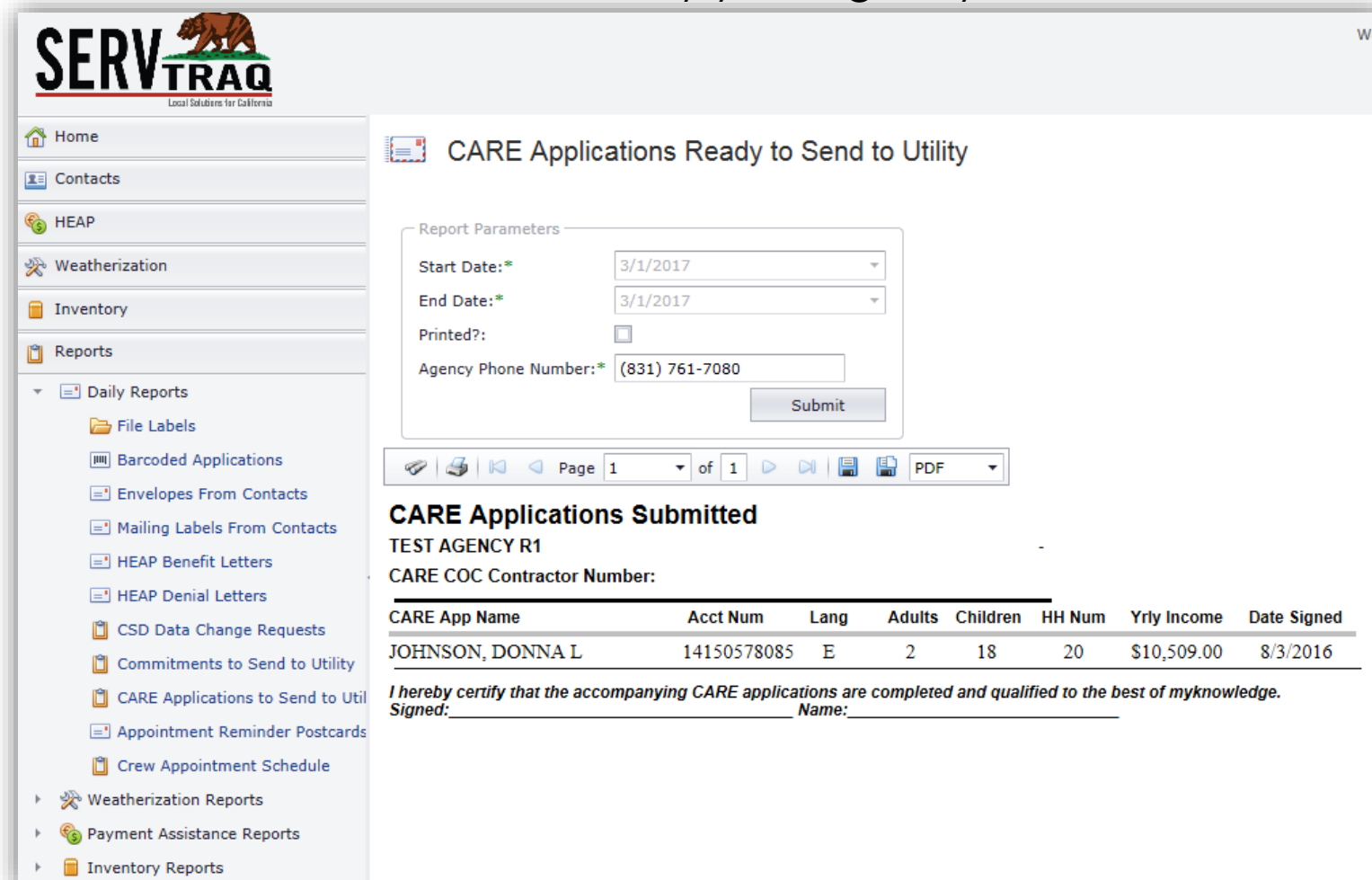
Phone: 8317617080 Fax: 8317280535

### COMMITMENTS FOR ELIGIBLE LIHEAP APPLICANT ACCOUNTS

Acct Num	Account Name	Ben Amt	Prog	Phone	Contact	Commitment Notes
64743760361	ADDIE GARZA	\$221.00	FT	831 2728581	MARK RODRIGUEZ	500
45781459621	JAIME ALFARO	\$306.00	FT	650 6304760	JULIE GARCIA	PLEDGE MADE ON 3/33
14785236978	MARIA MENDOZA	\$185.00	FT	831 4647518	GLADYS ROJAS	PLEDGED 185.00
11214125125	ABBY NORMAL	\$308.00	FT	831 9854542	GLADYS ROJAS	COMMITMENT CALLED IN ON 12/21/1

# CARE Applications to Send to Utility

**ServTraq(c) CARE Application to Send to Utility Report** provides a summary of CARE Applications received by your agency.



The screenshot displays the SERV TRAQ web application interface. The left sidebar contains a navigation menu with the following items: Home, Contacts, HEAP, Weatherization, Inventory, and Reports. The Reports section is expanded, showing a list of report types: Daily Reports (with sub-items: File Labels, Barcoded Applications, Envelopes From Contacts, Mailing Labels From Contacts, HEAP Benefit Letters, HEAP Denial Letters, CSD Data Change Requests, Commitments to Send to Utility, CARE Applications to Send to Utility, and Appointment Reminder Postcards), Weatherization Reports, Payment Assistance Reports, and Inventory Reports.

The main content area is titled 'CARE Applications Ready to Send to Utility'. It features a 'Report Parameters' section with the following fields: Start Date (3/1/2017), End Date (3/1/2017), Printed? (checkbox), and Agency Phone Number ((831) 761-7080). A 'Submit' button is located below these fields.

Below the report parameters, there is a pagination bar showing 'Page 1 of 1' and a 'PDF' button.

The report title is 'CARE Applications Submitted'. Below the title, it says 'TEST AGENCY R1' and 'CARE COC Contractor Number:'. A table follows, showing the details of the submitted application.

CARE App Name	Acct Num	Lang	Adults	Children	HH Num	Yrly Income	Date Signed
JOHNSON, DONNA L	14150578085	E	2	18	20	\$10,509.00	8/3/2016

Below the table, there is a certification statement: 'I hereby certify that the accompanying CARE applications are completed and qualified to the best of my knowledge.' followed by 'Signed:' and 'Name:'.



## CARE Report include the following information:

- Customer Name
- Account Number
- Language Preference
- Total # of Adults in HH
- Total # of Children in HH
- Household Yearly Gross Income
- Date Application was Signed

### CARE Applications Submitted

TEST AGENCY R1

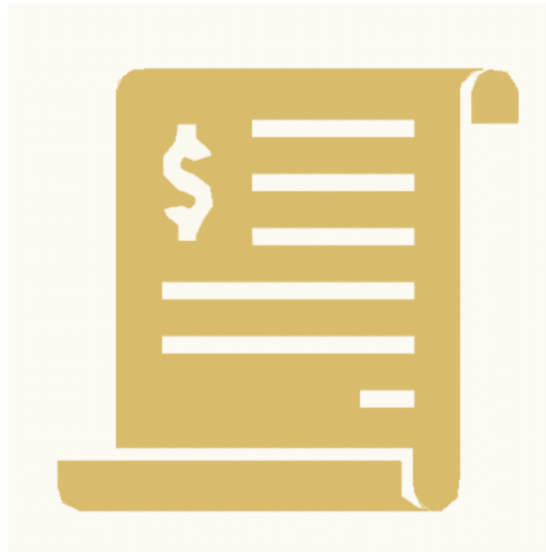
CARE COC Contractor Number:

CARE App Name	Acct Num	Lang	Adults	Children	HH Num	Yrly Income	Date Signed
JOHNSON, DONNA L	14150578085	E	2	18	20	\$10,509.00	8/3/2016

*I hereby certify that the accompanying CARE applications are completed and qualified to the best of my knowledge.*

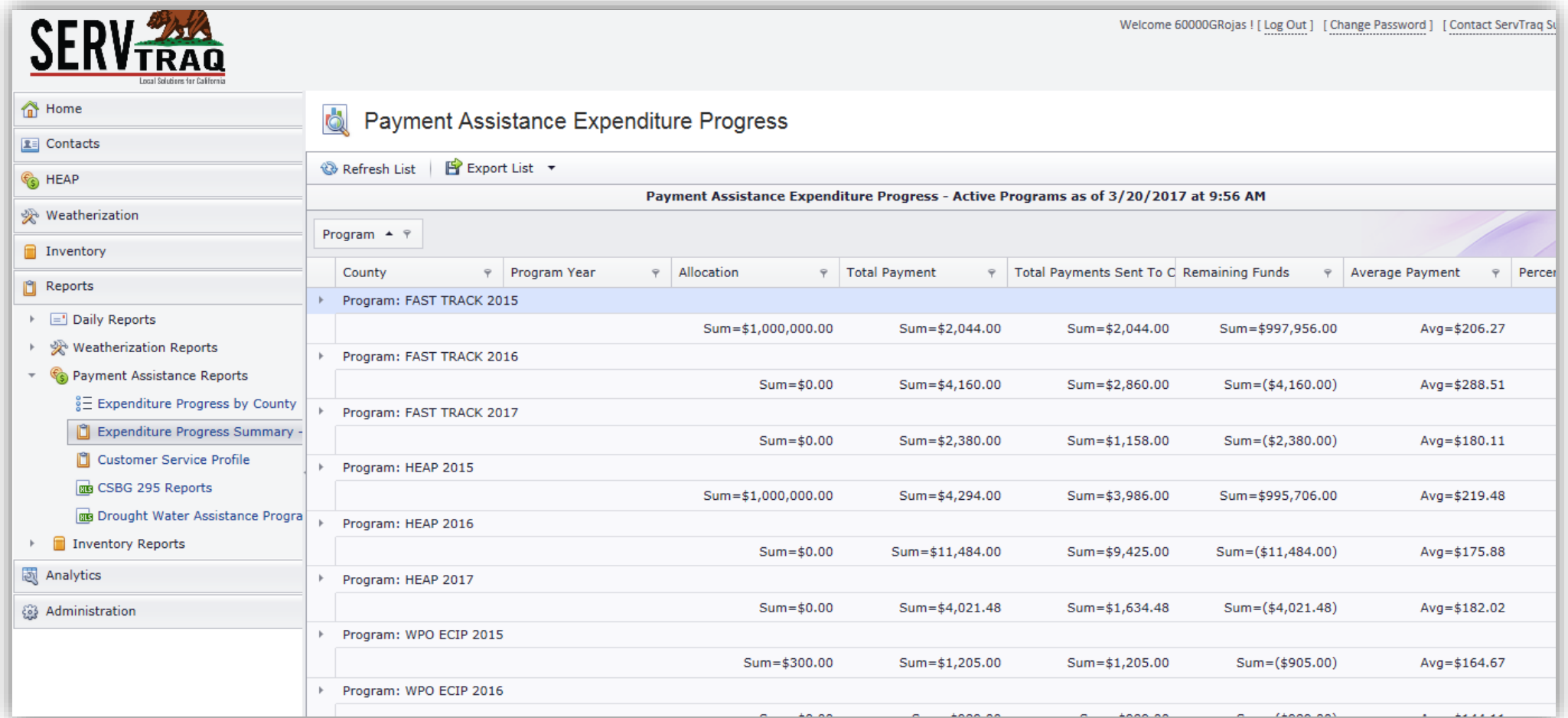
Signed: \_\_\_\_\_ Name: \_\_\_\_\_

# Payment Assistance Reports



# Expenditure Progress by County

The **Payment Assistance Expenditure Progress by County** provides a real-time expenditure snapshot by county and program.



The screenshot displays the SERV TRAQ web application interface. The left sidebar contains navigation links: Home, Contacts, HEAP, Weatherization, Inventory, Reports (with sub-links for Daily Reports, Weatherization Reports, Payment Assistance Reports, Expenditure Progress by County, Expenditure Progress Summary, Customer Service Profile, CSBG 295 Reports, Drought Water Assistance Program, and Inventory Reports), Analytics, and Administration. The main content area is titled "Payment Assistance Expenditure Progress" and includes a "Refresh List" button and an "Export List" dropdown. Below this is a table titled "Payment Assistance Expenditure Progress - Active Programs as of 3/20/2017 at 9:56 AM". The table has columns for County, Program Year, Allocation, Total Payment, Total Payments Sent To C, Remaining Funds, Average Payment, and Percent. The data is organized by program, with each program having a summary row and a detailed row for each county.

County	Program Year	Allocation	Total Payment	Total Payments Sent To C	Remaining Funds	Average Payment	Percent
Program: FAST TRACK 2015							
		Sum=\$1,000,000.00	Sum=\$2,044.00	Sum=\$2,044.00	Sum=\$997,956.00	Avg=\$206.27	
Program: FAST TRACK 2016							
		Sum=\$0.00	Sum=\$4,160.00	Sum=\$2,860.00	Sum=(\$4,160.00)	Avg=\$288.51	
Program: FAST TRACK 2017							
		Sum=\$0.00	Sum=\$2,380.00	Sum=\$1,158.00	Sum=(\$2,380.00)	Avg=\$180.11	
Program: HEAP 2015							
		Sum=\$1,000,000.00	Sum=\$4,294.00	Sum=\$3,986.00	Sum=\$995,706.00	Avg=\$219.48	
Program: HEAP 2016							
		Sum=\$0.00	Sum=\$11,484.00	Sum=\$9,425.00	Sum=(\$11,484.00)	Avg=\$175.88	
Program: HEAP 2017							
		Sum=\$0.00	Sum=\$4,021.48	Sum=\$1,634.48	Sum=(\$4,021.48)	Avg=\$182.02	
Program: WPO ECIP 2015							
		Sum=\$300.00	Sum=\$1,205.00	Sum=\$1,205.00	Sum=(\$905.00)	Avg=\$164.67	
Program: WPO ECIP 2016							
		Sum=\$0.00	Sum=\$0.00	Sum=\$0.00	Sum=(\$0.00)	Avg=\$0.00	

# Expenditure Progress Summary – Print Version

The **Payment Assistance Expenditure Progress Summary** report provides a snapshot by program year.

## Payment Assistance Expenditures

### Active PA Programs

#### Program: FAST TRACK 2015

2015	Allocation Amt	Benefit Actual	Pct Exp	\$ Remaining	HH Remaining
	\$1,000,000.00	\$2,044.00	0.20%	\$997,956.00	2,441
	EB Avg	Vul Pop %	Avg Benefit	Avg HH Size	HH Served
	53.99%	20.00%	\$408.80	2	5

#### Program: FAST TRACK 2016

2016	Allocation Amt	Benefit Actual	Pct Exp	\$ Remaining	HH Remaining
	\$0.00	\$4,160.00	0.00%	(\$4,160.00)	-15
	EB Avg	Vul Pop %	Avg Benefit	Avg HH Size	HH Served
	26.98%	46.67%	\$277.33	2	15

#### Program: FAST TRACK 2017

2017	Allocation Amt	Benefit Actual	Pct Exp	\$ Remaining	HH Remaining
	\$0.00	\$2,380.00	0.00%	(\$2,380.00)	-9
	EB Avg	Vul Pop %	Avg Benefit	Avg HH Size	HH Served
	23.73%	55.56%	\$264.44	2	9

#### Program: HEAP 2015

2015	Allocation Amt	Benefit Actual	Pct Exp	\$ Remaining	HH Remaining
	\$1,000,000.00	\$4,294.00	0.42%	\$995,706.00	3,710
	EB Avg	Vul Pop %	Avg Benefit	Avg HH Size	HH Served
	18.29%	43.75%	\$268.38	2	16

#### Program: HEAP 2016

2016	Allocation Amt	Benefit Actual	Pct Exp	\$ Remaining	HH Remaining
	\$0.00	\$11,484.00	0.00%	(\$11,484.00)	-42
	EB Avg	Vul Pop %	Avg Benefit	Avg HH Size	HH Served

# Customer Service Profile

**Customer Service Profile – Payment Assistance** report provides **average** Payment Assistance statistics within the past 5 years.

## Customers Service Profile-Payment Assistance


TEST AGENCY R1

Year	Avg HH Size	Avg Yrly Income	Avg Mo En Cost	Avg En Burden	Shut Off Comits	Avg Benefit	Total Households	Total Persons(HH Size)	Benefit Sum
2013	3.21	\$16,606.66	\$92.57	6.68%	2770	\$257.73	5568	17849	\$1,435,063.00
2014	1.85	\$8,350.20	\$340.74	48.96%	3	\$259.15	20	37	\$5,183.00
2015	2.06	\$9,253.24	\$80.67	10.46%	3	\$296.88	17	35	\$5,047.00
2016	1.87	\$7,469.76	\$89.70	14.41%	4	\$273.91	71	133	\$19,447.48
2017	2.32	\$13,317.02	\$91.27	8.22%	2	\$256.63	38	88	\$9,752.00
Totals	2.26	\$10,999.37	\$138.99	17.7%	2782	\$268.86	5714	18142	\$1,474,492.48



# CSBG 295 Reports

The **CSBG 295** report provides data collected under Payment Assistance records and Weatherization eligibility records.



The screenshot displays the SERVTRAQ web application interface. On the left is a navigation sidebar with the following menu items: Home, Contacts, HEAP, Weatherization, Inventory, Reports (expanded to show Daily Reports, Weatherization Reports, Payment Assistance Reports, and Inventory Reports), Analytics, and Administration. The main content area is titled "CSBG 295 Reports" and contains a "Report Parameters" section. This section includes three dropdown menus: "Report Type:" (selected: "Jobs by Reported Date; Applications by Entry Date in that month"), "Reported Date:" (selected: "Jobs by Reported Date; Applications by Entry Date in that month"), and "Data Type:" (selected: "Applications by Intake Date; Reported Jobs by Completed Date"). A "Submit" button is located at the bottom right of the form.

**SERVTRAQ**  
Local Solutions for California

Home

Contacts

HEAP

Weatherization

Inventory

Reports

- Daily Reports
- Weatherization Reports
- Payment Assistance Reports
- Inventory Reports

Analytics

Administration

**CSBG 295 Reports**

Report Parameters

Report Type:\* Jobs by Reported Date; Applications by Entry Date in that month

Reported Date:\* Jobs by Reported Date; Applications by Entry Date in that month


Data Type:\* Applications by Intake Date; Reported Jobs by Completed Date

Submit

# ServTraq Support

- Visit our Solutions page
- Email us at: [Support@ServTraq.com](mailto:Support@ServTraq.com)
- Contact us: (831) 761-1747

Welcome 60000GROJAS ! [ [Log Out](#) ] [ [Change Password](#) ] [ [Contact ServTraq Support](#) ]

 **ServTraq Support**

Create a ticket in the ServTraq helpdesk system by submitting the information below. ServTraq help desk staff will get back to you as soon as possible. All fields are required.

Type:\*

Department:\*

Description:\*

**New User Request**

**Solutions**  
Find the help you need at any hour of the day. Our solutions page contains training videos, answers to frequently asked questions, and information on upcoming training events!

**Forums**  
Stay informed and up to date with Special Focus Topics that may impact your operations. You can also find previous ServTraq e-mail communications released and material on ServTraq Webinars held.