Training Video

Progress Billing Reports

Overview

✓ Define **Progress Billing**

✓ Review **Features that Support** Progress Billing

✓ Review Progress Billing **Reports Available for Analysis**

What is Progress Billing?

Progress Billing is the practice of entering Weatherization measure in ServTraq in real time. The purpose of Progress Billing is to track Open Jobs and their progress towards completion via use of Job Statuses in ServTraq. Progress Billing helps maintain more accurate inventory counts and Open Job visibility through various reports available.

Benefits		
Ability to Run Multiple Reports	Up-to-Date inventory counts	Less work to complete in a short period of time

Support Features

Job Statuses

Job Tracking Sheet

Job Tracking Sheet

Reports>Weatherization Reports>Job Tracking Sheets

Benefits

- Communicate across different stakeholders the status of a job including:

  - Managers

  - Inventory Coordinators

  - Scheduling or Data Entry Staff

- Paper file/Electronic file

Open Job Status Path to Completion

No Status

Ready to Assess

Assessed

Materials Hold

Ready for Work

Job Completed

Ready for Post Wx Inspection

Post Wx Inspection Completed

Billing & Reporting

Open Jobs List

*Weatherization>Under **Scheduling** click on **Open Jobs List***

Progress Billing Reports

*All of the following reports can be located in the **Reports** section in ServTraq, under **Weatherization Reports**.*

- Jobs not Completed Activity Entered
- Measures Installed List
- Materials Entered on Not Reported Jobs
- Inventory Usage List
- Inventory Detail Report
- Jobsheet Employee Details by Date Range
- Jobsheet Employee Details List
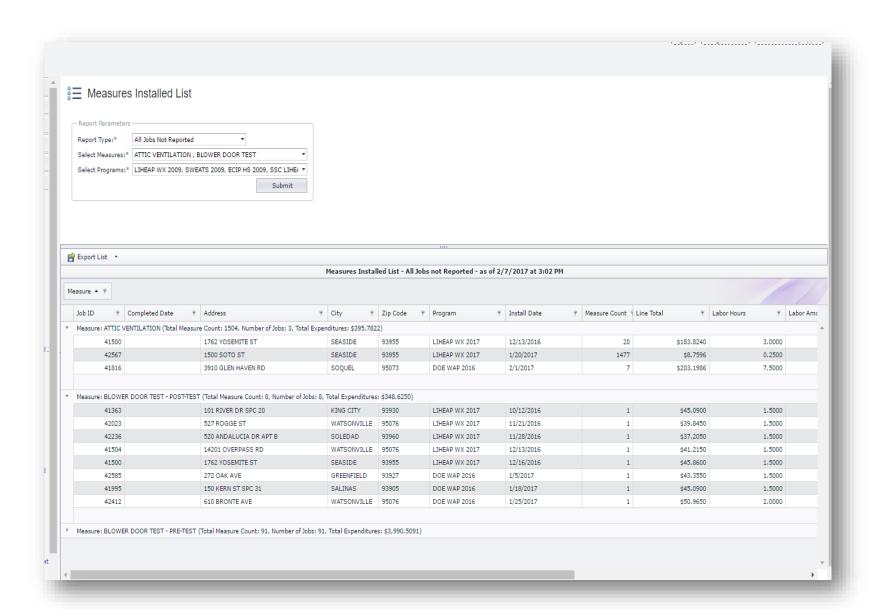
Jobs not Completed, Activity Entered

This report breaks down open jobs by **program funding** source **used**.

Measures Installed List

Provides detailed information such as:

- **Job Information**
- **Funding Source used**
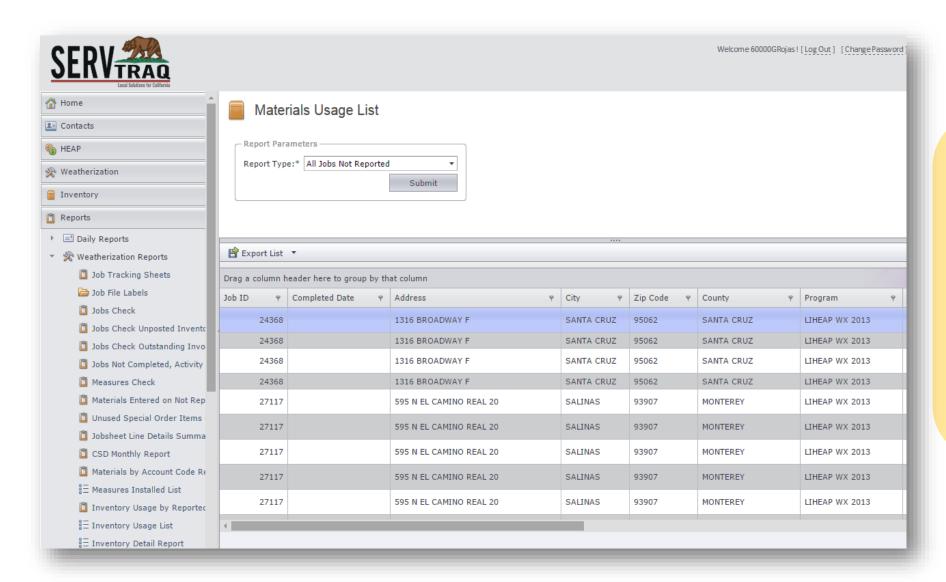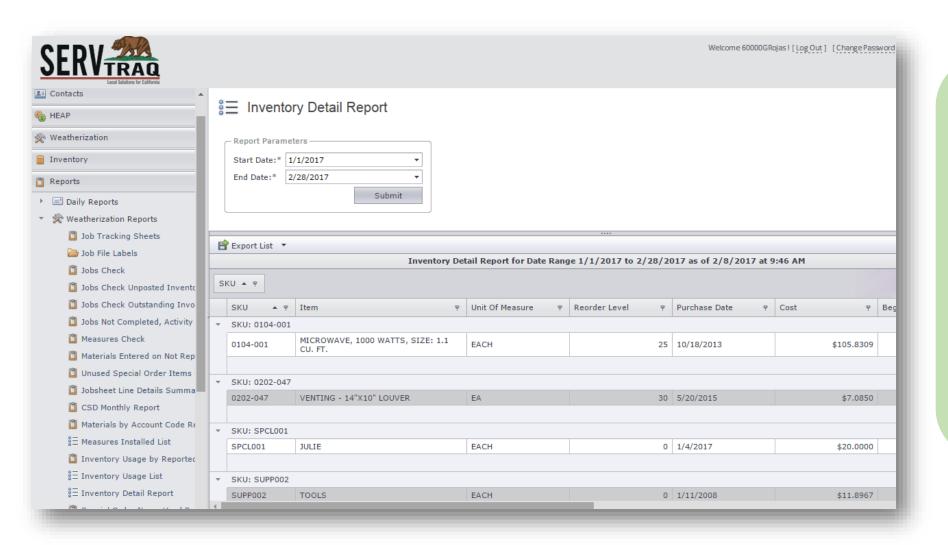- **Measure cost breakdown**

Materials Entered on Not Reported Jobs

This report **categorizes** materials by **account code.**
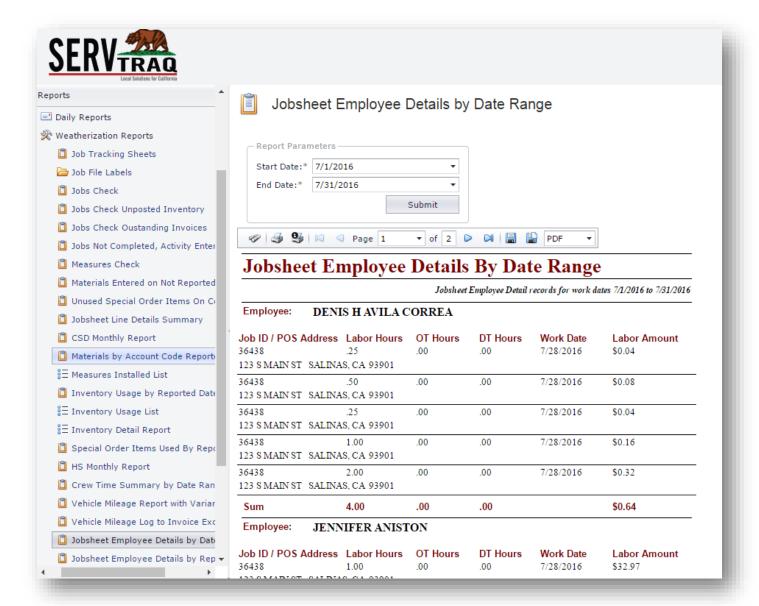
Inventory Usage List

This report **extracts** detailed information on Materials **used** on Measures installed.
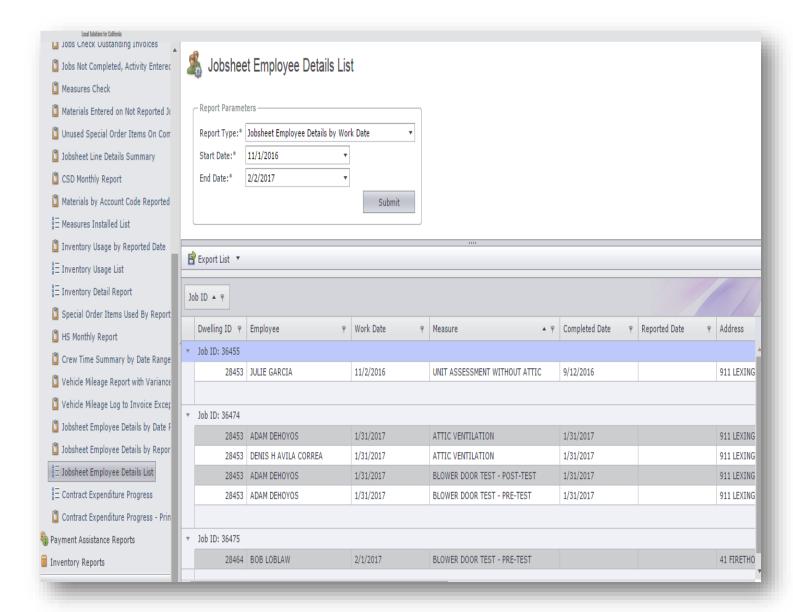
Inventory Detail Report

This report provides a **snapshot** of **Inventory transactions** recorded over the **period of time** selected.

Jobsheet Employee Details by Date Range

This report provides a quick overview of **labor costed to jobs**.

Jobsheet Employee Details List

ServTraq Support

- Visit our Solutions page
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