



**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.

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

# **Support Features**



**Job Statuses**

**Job Tracking Sheet**

# Job Tracking Sheet

*Reports>Weatherization Reports>Job Tracking Sheets*

JobID: 36377      **Job Tracking Sheet**      O      ApplicationID: 118960  
 DwellingID 26413

Occupant: GUZMAB, MARLEN      Landlord:

1910 47 ST

SALINAS CA 93905      Job INITIAL WEATHERIZATION

WSAG Signed: 7/21/2014      Certification Date: 7/21/2014      Pre-1979: YES ☐ NO ☐ HUD-Funded: YES ☐ NO ☐

Appt Date/Time	Action	Employee
7/16 @1:30pm	Assessment	Assessor
8/1 @9am	HCS Work	Crew Leader
8/24 @ 9:30am	HCS Work	Crew Leader
9/1 @10:30am	Post Inspection	Assessor

Notes:

Eligible Programs as of 8/30/2016 9:40:02 AM

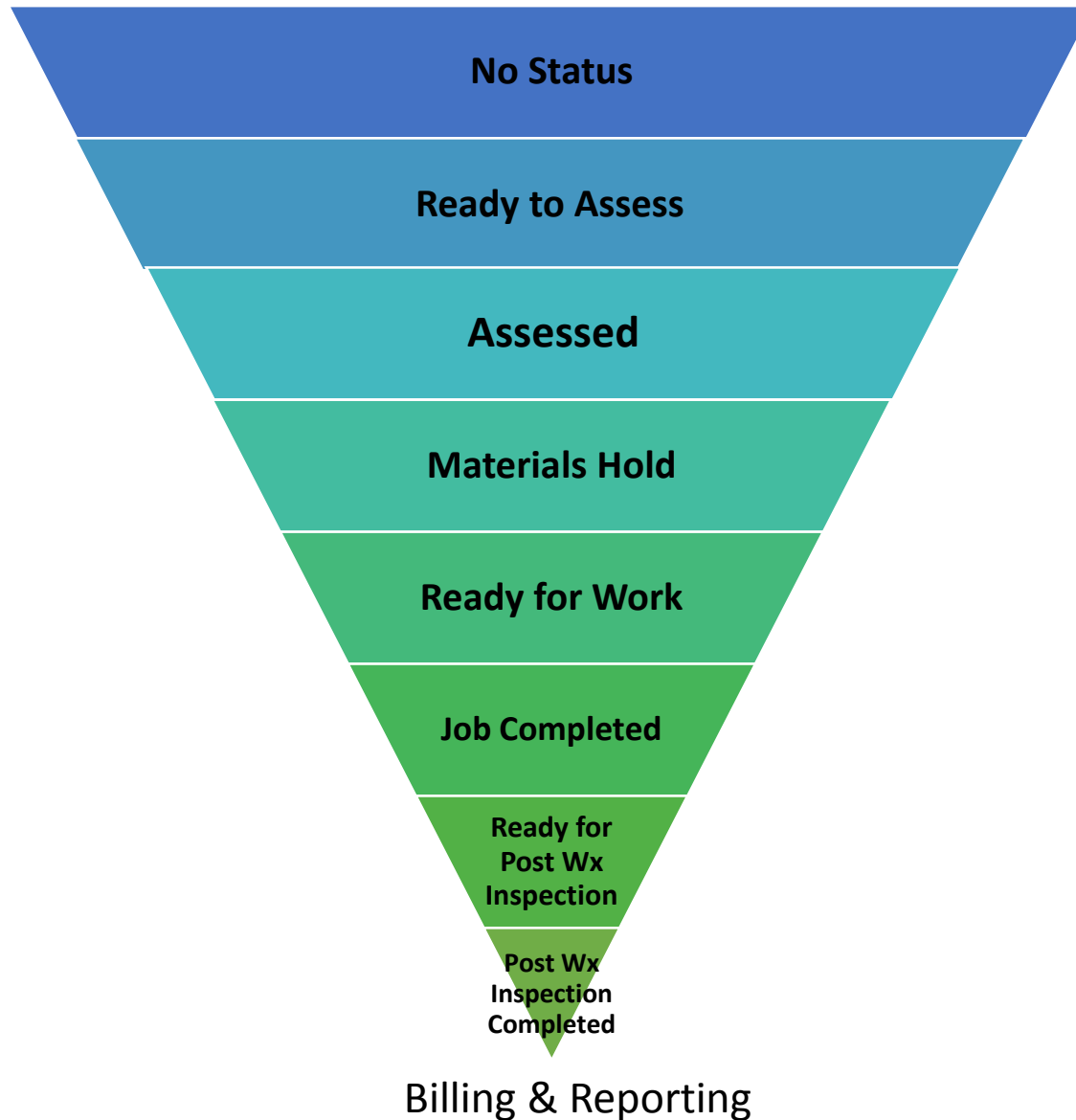
<input type="checkbox"/> ECHS 2015	<input type="checkbox"/> ECHS 2016	<input type="checkbox"/> ECHS 2015	<input type="checkbox"/> ECHS 2016
<input type="checkbox"/> FEE FOR SERVICE	<input type="checkbox"/> LIHEAP WX 2015	<input checked="" type="checkbox"/> LIHEAP WX 2016	<input type="checkbox"/> LIWP WX 2015
<input type="checkbox"/> PGESAP2013	<input type="checkbox"/> SUPPLEMENTAL LIWP WX 2015	<input type="checkbox"/> SWEATS 2015	<input type="checkbox"/> SWEATS 2016
<input type="checkbox"/> TOILET RETROFIT 2015			

EN	Date	Action/Status	Employee	Hours	Note	By
✓	7/13/16	Scheduled for Assessment	Assessor	2.5		ECSW
✓	7/16/16	Assessment Complete	Assessor	2.5		A
✓	7/17/16	HCS ready to access	E/S Manager	1		ESM
✓	7/30/16	Scheduled Work	Crew Leader	1		ECSW
✓	8/1/16	Appointment kept	Crew Leader	1		CL
✓	8/2/16	Material Hold	E/S Manager			ESM
✓	8/15/16	Received Materials	Inventory Manager			IM
✓	8/17/16	HCS ready for work	E/S Manager	7		ESM
✓	8/23/16	Scheduled for work	Crew Leader	7		ECSW
✓	8/24/16	Appointment kept	Crew Leader	5.5		CL
✓	8/25/16	Ready for Post Inspection	E/S Manager	.5		ESM
✓	8/25/16	Scheduled Post Inspection	Assessor	.5		ECSW
✓	9/1/16	Appointment kept	Assessor	.5		A

## 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



# Open Jobs List

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

☰ Open Jobs List

🔄 Refresh List

📄 Export List ▾

🌈 Color Key

Enter Search Criteria... 🔍

Drag a column header here to group by that column

LIWP Census Tract Eligible ▾	TRP Geographically Eligible ▾	Job ID ▾	ACC ▾	Job Type ▾	Current Status ▾	WSAG Signed Date ▾	Est. Hour
🔍	!	36475		INITIAL WEATHERIZATION	NO STATUS	2/1/2017	
✓	✓	36473		INITIAL WEATHERIZATION	NO STATUS	12/27/2016	
!	!	36469		INITIAL WEATHERIZATION	NO STATUS	12/14/2016	
!	!	36470		INITIAL WEATHERIZATION	NO STATUS	12/13/2016	
!	✓	36466		INITIAL WEATHERIZATION	CALLBACK APPROVED	10/26/2016	
!	!	36465		INITIAL WEATHERIZATION	NO STATUS	10/25/2016	
!	✓	20771		INITIAL WEATHERIZATION	ASSESS IN PLACE JOB	10/21/2016	
!	✓	36468		REWEATHERIZATION	NO STATUS	10/21/2016	
!	✓	36460		REWEATHERIZATION	NO STATUS	10/21/2016	
!	✓	36463		REWEATHERIZATION	NO STATUS	10/20/2016	
!	✓	36462		INITIAL WEATHERIZATION	NO STATUS	10/20/2016	
!	✓	36459		INITIAL WEATHERIZATION	NO STATUS	10/20/2016	
!	✓						

# 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



## Jobs Not Completed, Activity Entered

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### Jobs Not Completed Activity Entered

#### DOE WAP 2014

List Name / Address	DwellingID	JobID	Completed	Sub.	Fees	Materials	Job Total
GARCIA, JULIE 160 TWINDLE AVE WATSONVILLE 95076	27416	36398		\$0.00	\$0.00	\$3.79	\$33.54
GARCIA, ANA ISABEL 1251 PALM AVE SOLEDAD 93960	24095	33732		\$0.00	\$0.00	\$0.00	\$36.09
STEPNEY, PATRICIA 203 E LAVERNE AVE POMONA 91767	28431	36421		\$0.00	\$0.00	\$0.00	\$51.00
Program: DOE WAP 2014 contains 3 jobs.				\$0.00	\$0.00	\$3.79	\$120.63

#### ECHS 2015

List Name / Address	DwellingID	JobID	Completed	Sub.	Fees	Materials	Job Total
VACANT, JUAN 678 MAIN STA AROMAS 95076	28435	36425		\$2,643.80	\$0.00	\$58.90	\$2,738.79
Program: ECHS 2015 contains 2 jobs.				\$2,743.80	\$0.00	\$58.90	\$2,838.79

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**

## Measures Installed List

**Report Parameters**

Report Type:\* All Jobs Not Reported ▾

Select Measures:\* ATTIC VENTILATION , BLOWER DOOR TEST ▾

Select Programs:\* LIHEAP WX 2009, SWEATS 2009, ECIP HS 2009, SSC LIHEA ▾

Submit

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Export List ▾

**Measures Installed List - All Jobs not Reported - as of 2/7/2017 at 3:02 PM**

Measure ▲ ▾

Job ID	Completed Date	Address	City	Zip Code	Program	Install Date	Measure Count	Line Total	Labor Hours	Labor Amc
<b>Measure: ATTIC VENTILATION (Total Measure Count: 1504, Number of Jobs: 3, Total Expenditures: \$395.7822)</b>										
41500		1762 YOSEMITE ST	SEASIDE	93955	LIHEAP WX 2017	12/13/2016	20	\$183.8240	3.0000	
42567		1500 SOTO ST	SEASIDE	93955	LIHEAP WX 2017	1/20/2017	1477	\$8.7596	0.2500	
41816		3910 GLEN HAVEN RD	SOQUEL	95073	DOE WAP 2016	2/1/2017	7	\$203.1986	7.5000	
<b>Measure: BLOWER DOOR TEST - POST-TEST (Total Measure Count: 8, Number of Jobs: 8, Total Expenditures: \$348.6250)</b>										
41363		101 RIVER DR SPC 20	KING CITY	93930	LIHEAP WX 2017	10/12/2016	1	\$45.0900	1.5000	
42023		527 ROGGE ST	WATSONVILLE	95076	LIHEAP WX 2017	11/21/2016	1	\$39.8450	1.5000	
42236		520 ANDALUCIA DR APT B	SOLEDAD	93960	LIHEAP WX 2017	11/28/2016	1	\$37.2050	1.5000	
41504		14201 OVERPASS RD	WATSONVILLE	95076	LIHEAP WX 2017	12/13/2016	1	\$41.2150	1.5000	
41500		1762 YOSEMITE ST	SEASIDE	93955	LIHEAP WX 2017	12/16/2016	1	\$45.8600	1.5000	
42585		272 OAK AVE	GREENFIELD	93927	DOE WAP 2016	1/5/2017	1	\$43.3550	1.5000	
41995		150 KERN ST SPC 31	SALINAS	93905	DOE WAP 2016	1/18/2017	1	\$45.0900	1.5000	
42412		610 BRONTE AVE	WATSONVILLE	95076	DOE WAP 2016	1/25/2017	1	\$50.9650	2.0000	
<b>Measure: BLOWER DOOR TEST - PRE-TEST (Total Measure Count: 91, Number of Jobs: 91, Total Expenditures: \$3,990.5091)</b>										

# Materials Entered on Not Reported Jobs

 Materials Entered on Not Reported Jobs

Report Parameters

Submit

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## All Materials Entered, Jobs Not Reported

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Account 14403 - CONSTRUCTION MATERIALS -- SUBCONTRACTOR INSTALLED

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<u>Job ID</u>	<u>Address</u>	<u>Program</u>	<u>Comp. Date</u>	<u>Item</u>	<u>Qty</u>	<u>Cost</u>	<u>Ext. Cost</u>
32575		LIHEAP WX 2013		REPLACE T-STAT ON OVEN	1	\$236.01	\$236.01
33413		LIHEAP WX 2013		ELECTRICAL SURVEY FOR ATTIC INSULATION	1	\$122.00	\$122.00
Program: CONSTRUCTION MATERIALS -- SUBCONTRACTOR INSTALLED contains 2 items.							
Sum					2		\$358.01

This report **categories** materials by **account code**.

# Inventory Usage List

The screenshot displays the SERVTRAQ web application interface. The top header includes the SERVTRAQ logo with a bear icon and the text 'Local Solutions for California'. On the right, it says 'Welcome 60000GRojas!' with links for '[ Log Out ]' and '[ Change Password ]'.

The left sidebar contains a navigation menu with the following items: Home, Contacts, HEAP, Weatherization, Inventory, Reports, Daily Reports, Weatherization Reports (expanded), Job Tracking Sheets, Job File Labels, Jobs Check, Jobs Check Unposted Invento, Jobs Check Outstanding Invo, Jobs Not Completed, Activity, Measures Check, Materials Entered on Not Rep, Unused Special Order Items, Jobsheet Line Details Summa, CSD Monthly Report, Materials by Account Code R, Measures Installed List, Inventory Usage by Reporte, Inventory Usage List, and Inventory Detail Report.

The main content area is titled 'Materials Usage List'. It features a 'Report Parameters' section with a 'Report Type:' dropdown menu set to 'All Jobs Not Reported' and a 'Submit' button. Below this is an 'Export List' button and a table with the following columns: Job ID, Completed Date, Address, City, Zip Code, County, and Program. The table contains 12 rows of data, grouped by Job ID (24368 and 27117).

Job ID	Completed Date	Address	City	Zip Code	County	Program
24368		1316 BROADWAY F	SANTA CRUZ	95062	SANTA CRUZ	LIHEAP WX 2013
24368		1316 BROADWAY F	SANTA CRUZ	95062	SANTA CRUZ	LIHEAP WX 2013
24368		1316 BROADWAY F	SANTA CRUZ	95062	SANTA CRUZ	LIHEAP WX 2013
24368		1316 BROADWAY F	SANTA CRUZ	95062	SANTA CRUZ	LIHEAP WX 2013
27117		595 N EL CAMINO REAL 20	SALINAS	93907	MONTEREY	LIHEAP WX 2013
27117		595 N EL CAMINO REAL 20	SALINAS	93907	MONTEREY	LIHEAP WX 2013
27117		595 N EL CAMINO REAL 20	SALINAS	93907	MONTEREY	LIHEAP WX 2013
27117		595 N EL CAMINO REAL 20	SALINAS	93907	MONTEREY	LIHEAP WX 2013
27117		595 N EL CAMINO REAL 20	SALINAS	93907	MONTEREY	LIHEAP WX 2013

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

# Inventory Detail Report

**SERVTRAQ** Local Solutions for California

Welcome 60000GROJAS ! [ Log Out ] [ Change Password ]

**Inventory Detail Report**

Report Parameters

Start Date: \* 1/1/2017

End Date: \* 2/28/2017

Submit


Export List

Inventory Detail Report for Date Range 1/1/2017 to 2/28/2017 as of 2/8/2017 at 9:46 AM

SKU	Item	Unit Of Measure	Reorder Level	Purchase Date	Cost	Begin
SKU: 0104-001						
0104-001	MICROWAVE, 1000 WATTS, SIZE: 1.1 CU. FT.	EACH	25	10/18/2013	\$105.8309	
SKU: 0202-047						
0202-047	VENTING - 14"X10" LOUVER	EA	30	5/20/2015	\$7.0850	
SKU: SPCL001						
SPCL001	JULIE	EACH	0	1/4/2017	\$20.0000	
SKU: SUPP002						
SUPP002	TOOLS	EACH	0	1/11/2008	\$11.8967	

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

# Jobsheet Employee Details by Date Range



Local Solutions for California

Reports

- Daily Reports
- Weatherization Reports
  - Job Tracking Sheets
  - Job File Labels
  - Jobs Check
  - Jobs Check Unposted Inventory
  - Jobs Check Outstanding Invoices
  - Jobs Not Completed, Activity Enter
  - Measures Check
  - Materials Entered on Not Reported
  - Unused Special Order Items On C
  - Jobsheet Line Details Summary
  - CSD Monthly Report
  - Materials by Account Code Report
- Measures Installed List
- Inventory Usage by Reported Date
- Inventory Usage List
- Inventory Detail Report
- Special Order Items Used By Rep
- HS Monthly Report
- Crew Time Summary by Date Ran
- Vehicle Mileage Report with Variar
- Vehicle Mileage Log to Invoice Exc
- Jobsheet Employee Details by Dab
- Jobsheet Employee Details by Rep

## Jobsheet Employee Details by Date Range

Report Parameters

Start Date:\* 7/1/2016

End Date:\* 7/31/2016

Submit

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### Jobsheet Employee Details By Date Range

*Jobsheet Employee Detail records for work dates 7/1/2016 to 7/31/2016*

**Employee: DENIS H AVILA CORREA**

Job ID / POS Address	Labor Hours	OT Hours	DT Hours	Work Date	Labor Amount
36438	.25	.00	.00	7/28/2016	\$0.04
123 S MAIN ST SALINAS, CA 93901					
36438	.50	.00	.00	7/28/2016	\$0.08
123 S MAIN ST SALINAS, CA 93901					
36438	.25	.00	.00	7/28/2016	\$0.04
123 S MAIN ST SALINAS, CA 93901					
36438	1.00	.00	.00	7/28/2016	\$0.16
123 S MAIN ST SALINAS, CA 93901					
36438	2.00	.00	.00	7/28/2016	\$0.32
123 S MAIN ST SALINAS, CA 93901					
<b>Sum</b>	<b>4.00</b>	<b>.00</b>	<b>.00</b>		<b>\$0.64</b>

**Employee: JENNIFER ANISTON**

Job ID / POS Address	Labor Hours	OT Hours	DT Hours	Work Date	Labor Amount
36438	1.00	.00	.00	7/28/2016	\$32.97
123 S MAIN ST SALINAS, CA 93901					

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

# Jobsheet Employee Details List

Local Solutions for California

Jobsheet Employee Details List

Report Parameters

Report Type:\* Jobsheet Employee Details by Work Date

Start Date:\* 11/1/2016

End Date:\* 2/2/2017

Submit

Export List

Job ID

Dwelling ID	Employee	Work Date	Measure	Completed Date	Reported Date	Address
Job ID: 36455						
28453	JULIE GARCIA	11/2/2016	UNIT ASSESSMENT WITHOUT ATTIC	9/12/2016		911 LEXING
Job ID: 36474						
28453	ADAM DEHOYOS	1/31/2017	ATTIC VENTILATION	1/31/2017		911 LEXING
28453	DENIS H AVILA CORREA	1/31/2017	ATTIC VENTILATION	1/31/2017		911 LEXING
28453	ADAM DEHOYOS	1/31/2017	BLOWER DOOR TEST - POST-TEST	1/31/2017		911 LEXING
28453	ADAM DEHOYOS	1/31/2017	BLOWER DOOR TEST - PRE-TEST	1/31/2017		911 LEXING
Job ID: 36475						
28464	BOB LOBLAW	2/1/2017	BLOWER DOOR TEST - PRE-TEST			41 FIRETHO

This report provides  
**DIRECT** Program  
Activity-Labor Hours  
costed to jobs.

# ServTraq Support



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

A screenshot of the ServTraq web application's support page. On the left is a vertical navigation menu with icons and labels for Home, Payment Receipt Log, Contacts, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. The main content area is titled "ServTraq Support" with a question mark icon. It contains a text box for "Description:" and a "Submit" button. Below the text box are two sections: "Solutions" with a paragraph about help resources, and "Forums" with a paragraph about staying informed through focus topics, e-mails, and webinars.