



HEAP Application Data Entry Webinar

January 18, 2017

Customer Search

Welcome 60407Jgarcia ! [Log Out] [



- Home
- Contacts
- HEAP
 - Customer/Application Search
 - Online Application Processing
 - Application Data Transfer
 - Rejected Records
 - Rejected Record Search and Entry
 - Rejected Record Clearance
 - Credit Return Payment Update
 - CARE RRP Application Entry
- Weatherization
- Inventory
- Reports
- Analytics
- Administration



Customer/Application Search

Search Parameters

Barcode:

Name:

Social Security Number:

Home Phone:

Date of Birth:

POS Address:

POS Zip/City:

Account Number:

Second Account Number:

Reverse Lookup:

Users can now search by
Application Barcode
Number.

Program	Application Status	Payment A
HEAP 2004	TRANSFERRED	
HEAP 2011	TRANSFERRED	
FAST TRACK 2007	TRANSFERRED	
HEAP 2014	DENIED	
WPO ECIP 2014	DENIED	
FAST TRACK 2014	DENIED	

Department of Community Services and Development
Energy Intake Form
CSD 43 (11/2015)

Agency: Intake Initials: Intake Date:

Official Use Only:
Priority Points
A.C.C.
Eligibility Cert Date
Job Control Code

First Name Middle Initial Last Name Date of Birth
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
Social Security Number (SSN) Telephone Number: () ☐ Message Only?
E-mail Address (Optional):

PEOPLE LIVING IN HOUSEHOLD
Enter the total number of people in the household, including the applicant

INCOME
Enter the number of household members who receive income

Demographics - Enter the number of people who are:
Ages 0 to 2 Years TANF / CalWorks
Ages 3 to 5 Years SSI / SSP
Ages 6 to 18 Years SSA / SSDI
Ages 19 to 59 Paycheck(s)
Ages 60 and Older Interest
Disabled Pension
Native American Other
Seasonal or Migrant Farmworker Total Income

HOUSEHOLD MEMBERS (Optional)
FULL NAME: Full name is First Name, Last Name.
RELATIONSHIP TO THE APPLICANT: For example: husband, daughter, friend, aunt, grandfather, etc.
DATE OF BIRTH: List the date of birth of each household member.
AMOUNT OF MONTHLY GROSS INCOME: "gross" income means the amount of money received before taxes or anything else is taken out.
If you have more than 8 people in your household, you can write the information on a separate piece of paper.

First Name Last Name Relation to Applicant Date of Birth Amount of Monthly Income Source of Income


TEST AGENCY
135 AVIATION WAY, STE 7
WATSONVILLE CA 95076

E AP
JULIE GARCIA
555 MAIN ST APT 1
WATSONVILLE, CA 95076



407300

HEAP Application Wizard Entry



Local Solutions for California

Welcome 60407Jgarcia ! [Log Out]

Home

Contacts

HEAP

- Customer/Application Search
- Online Application Processing
- Application Data Transfer
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 - Rejected Record Search and Entry
 - Rejected Record Clearance
 - Credit Return Payment Update
 - CARE RRP Application Entry

Weatherization

Inventory

Reports

Analytics

Administration

Customer/Application Search

Search Parameters

Barcode:

Name:

JULIE

GARCIA

Social Security Number:

123-45-6789

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:

ApplicationID

Submit

Clear

Click **HEAP Application Wizard** to try the new HEAP Data Entry Design!

New Customer

New HEAP Application

HEAP Application Wizard

New Drought Application

Edit Application

Refresh

Export

Search Results

Program	Application Status	Payment Amount	Intake Date	Transfer Date	Customer Name
HEAP 2004	TRANSFERRED	\$209.00	5/13/2004	5/26/2004	JULIE M GARCIA
HEAP 2011	TRANSFERRED	\$278.00	5/3/2011	5/25/2011	JULIE M GARCIA
FAST TRACK 2007	TRANSFERRED	\$400.00	2/13/2007	3/8/2007	JULIE GARCIA
HEAP 2014	DENIED	\$0.00	3/5/2014		JULIE GARCIA
WPO ECIP 2014	DENIED	\$0.00	12/1/2014		JULIE GARCIA
FAST TRACK 2014	DENIED	\$0.00	3/26/2015		JULIE GARCIA
			12/30/2015		JULIE GARCIA

3

Step 1: Customer Information

Exit

Start Over

Validate Addresses

Application Steps

Customer

Mailing Address

Physical Address

Household

Electricity

Natural Gas

Wood/Propane/Oil

Income

Intake/Program

New Application Step 1 of 9: Customer Information

Name: JULIE GARCIA

First Name* MI Last Name*

Social Security Number*: 765-55-5555

Date of Birth*: 1/1/1988

Language*: ENGLISH

Ethnicity:

Primary Ethnicity Ethnicity Subcategory

Contact Information

Home Phone: (831) 359-0699

Phone Number Ext

☐ Phone Number is a duplicate for the program year

Message Phone: () -

Number Ext

Mobile Phone: () -

Number

Other Phone: () -

Number Ext

E-Mail Address: Julie@ServTraq.com

Best Time to Call: MORN

If you receive a "Phone Duplicate" Message in ServTraq check this box!

Start collecting e-mail addresses for a more efficient way of complying with the CSD 15 Day Written Notification requirement.

Next >

Step 2:Mailing Address

Exit

Start Over

Validate Addresses

Application Steps

Customer

Mailing Address

Physical Address

Household

Electricity

Natural Gas

Wood/Propane/Oil

Income

Intake/Program

New Application Step 2 of 9: Mailing Address

Line 1:

Care Of Address # Address Street/PO Box* Street Type

Line 2:

Building Type Unit Number

Line 3:

Zip Code* City* County* State*

☐ Mailing Address is a duplicate for the program year

If you receive a "Mailing Address Duplicate" Message in ServTraq check this box!

< Previous

Next >

Step 3: POS Address

Exit

Start Over

Validate Addresses

Application Steps

Customer

Mailing Address

Physical Address

Household

Electricity

Natural Gas

Wood/Propane/Oil

Income

Intake/Program

New Application Step 3 of 9: Physical/Place of Service Address

☒ Place of Service Address is the same as the mailing address **NEW!**

Line 1: 555 MAIN STREET

Address #* Address Street* Street Type

Line 2: APARTMENT 1

Building Type Unit Number

Line 3: 95076 WATSONVILLE SANTA CRUZ CA

Zip Code* City* County* State*

US Census Tract: 6087110300

☐ Place of Service Address is a duplicate for the program year

☒ Has the customer lived at this Address for the past 12 months?

< Previous

Next >

Click the magnifying glass to generate LIWP leads from HEAP Applications.

Step 4: Household Breakdown Summary Entry

Exit

Start Over

Validate Addresses

Application Steps

Customer

Mailing Address

Physical Address

Household

Electricity

Natural Gas

Wood/Propane/Oil

Income

Intake/Program

New Application Step 4 of 9: Household Breakdown

Choose a demographics entry type:

☒ Summary - Numbers per category

☐ Individual Household Members (CSBG Data)

Household Demographics

Household Size*: 4

2 Years & Younger*: 0

Ages 3 to 5*: 1

Ages 6 to 18*: 0

Ages 19 to 59*: 2

Age 60 or Older*: 0

Disabled*: 0

Native American*: 0

Limited English*: 0

Farmworker*: 0

< Previous

Next >

The CSD Form 43 now has an optional “Household Roster” section.

If the household roster was left blank use the “Summary” entry to enter the household demographics as usual.

Step 4: Household Breakdown

Individual Entry

Exit

Start Over

Validate Addresses

Application Steps

Customer

Mailing Address

Physical Address

Household

Electricity

Natural Gas

Wood/Propane/Oil

Income

Intake/Program

New Application Step 4 of 9: Household Breakdown

Choose a demographics entry type:

☐ Summary - Numbers per category

☒ Individual Household Members (CSBG Data)

Family Type/Housing

Family Type*: SINGLE PARENT/FEMALE

Tenancy*: OWNER OCCUPIED

Household Members List

Add

	First Name	MI	Last Name	Date Of Birth	SSN


< Previous

Next >

If the Household Roster was filled out use
“Individual” entry.

- Select the “**Family Type**” and “**Tenancy**”
 - If your agency does not collect this information, just default the values to “Other” When possible. For any other field just make a selection from the options available. This information is not transferred to CSD, and is only collected for CSBG Reporting.
- Click **Add** to create one entry for each household member.

Step 4: Household Breakdown Individual Entry

 New Application Step 4 of 9: Household Breakdown

Choose a demographics entry type:

☐ Summary - Numbers per category

☒ Individual Household Members (CSBG Data)

Family Type/Housing

Family Type*: S

Tenancy*: O

Household Members

First Name

Add New Household Member

First Name:* JULIE

MI:

Last Name:* GARCIA

Date Of Birth:* 1/1/1988

SSN: 765-55-5555

Gender:* FEMALE

Ethnicity:* HISPANIC/LATINO

Relation to Applicant:* SELF

Education Level:* 2 OR 4 YR. COLLEGE GRADUATES

Hispanic:* ☒

Health Insurance:* ☐



Disabled:* ☐

Limited English:* ☐

Farmer:* ☐

Migrant Farmworker:* ☐

Seasonal Farmworker:* ☐



< Previous Next >

The first “*Household Member*” added defaults to the applicant. “*Individual*” entry requires entries on all fields.

- If your agency does **not** collect certain information, just default the values to “*Other*” when possible. For any other field just make a selection from the options available. This information is **not transferred to CSD**, and is only collected for CSBG Reporting.

Step 4: Household Breakdown Individual Entry

Addresses

New Application Step 4 of 9: Household Breakdown

Choose a demographics entry type:

☐ Summary - Numbers per category







☒ Individual Household Members (CSBG Data)

Family Type/Housing

Family Type*:

Tenancy*:


Household Members List

	First Name	MI	Last Name	Date Of Birth	SSN
 	JULIE		GARCIA	1/1/1988	765-55-5555
 	MANUEL		GARCIA	2/1/1990	- -
 	SANTIAGO		GARCIA	5/13/2015	- -

< Previous Next >

The household members added in this step will appear in **Household Income Breakdown**.

Step 5: Energy Costs- Electricity

 New Application Step 5 of 9: Energy Costs - Electricity

Choose a utility account to pay:*

☒ Electricity Account☐ Wood/Propane/Oil Account

☐ Natural Gas Account☐ None - Application is a Denial

Choose one of the two options regarding the applicant's Electric account:*

☒ Applicant has an Electric Account

☐ Applicant does not have a Electric Account

Electric Account Information

Utility:

Provider* Account Number*

Bill Name:

First Name* MI Last Name*

Bill Address:

Address Line 1* Address Line 2 City* Zip Code* State*

Bill Costs:

Bill Num Days* Supplied Amount Energy Cost* Total Bill Amount*

Pledge/CARE (RRP):

Pledge Date RRP?* RRP Exp. Date

Electric Account Performance Measurements

☐ Is Electricity Shut Off?☐ Was Disconnected Electric Service Restored?

☐ Is there a Past Due Notice for this account?

☐ Are the Utilities All Electric?

❖ CSD is now requires information on all utility accounts.

❖ Choose a Utility Account to Pay from the options provided—

❖ Electric Account Information

❖ **Supplied Amount:** Use this field to calculate the monthly energy cost if the *bill number of days* is greater than 33.

❖ **Energy Cost:** Monthly Energy Cost

❖ **Total Bill:** Total Amount Due

❖ **Pledge Date:** Use this field to log the date a pledge was made on the account.

❖ **RRP?:** Identifies if the account is on a reduced rate program.

❖ **RRP Exp Date:** PG&E Bills now display the CARE Enrollment Expiration Date. Use this field to track that information.

Step 5: Energy Costs- Natural Gas

Addresses

New Application Step 6 of 9: Energy Costs - Natural Gas

Choose one of the three options regarding the applicant's Natural Gas account:*

- ☒ Natural Gas Account is the same as the Electricity Account
- ☐ Natural Gas Account is different than the Electricity Account
- ☐ Applicant does not have a Natural Gas Account

Natural Gas Account Information

Utility: PACIFIC GAS & ELECTRIC COMPANY Provider* Account Number* 12345678944

Bill Name: JULIE First Name* MI Last Name* GARCIA

Bill Address: 555 MAIN STREET APARTMENT 1 Address Line 1* Address Line 2 City* WATSONVILLE Zip Code* 95076 State* CA

Bill Costs: 30 Bill # Days* \$0.00 Supplied Amount* \$100.00 Energy Cost* \$500.00 Total Bill Amount*

Pledge/CARE (RRP): 1/13/2016 Pledge Date Pledge Already Made? YES RRP?* 5/30/2020 RRP Exp. Date

Natural Gas Account Performance Measurements

- ☒ Is Natural Gas Shut Off?
- ☒ Is there a Past Due Notice for this account?

< Previous Next >

ServTraq will **skip** this step if the utility selected for electricity is **also** a gas provider.

If that's not the case, you'll need select **one** of the options available.

Step 5: Energy Costs- WPO

- If the house is **all** electric, ServTraq will also **skip** this step
- If **not**, select an option from the following—

Application Steps

Customer

Mailing Address

Physical Address

Household

Electricity

Natural Gas

Wood/Propane/Oil

Income

Intake/Program

New Application Step 7 of 9: Energy Costs - Wood/Propane/Oil

Choose one of the tow options regarding whether the applicant has a WPO account:

☐ Applicant does have a WPO Account

☐ Applicant does not have a WPO Account

Wood/Propane/Oil Account Information

Utility*: WOOD/PELLETS NON-REGULATED UTILITY

WPO Utility Type*

Vendor/Account: PACIFIC FIREWOOD

WPO Vendor*

NO ACCOUNT NUMBER

Account Number*

Bill Name: JULIE

First Name*

MI

GARCIA

Last Name*

Bill Address: 555 MAIN STREET APARTMENT 1

Address Line 1*

Address Line 2

WATSONVILLE

City*

95076

Zip Code*

CA

State*

Bill Costs: 90

Bill # Days*

\$500.00

Supplied Amount*

\$166.67

Energy Cost*

\$500.00

Total Bill Amount

Wood/Propane/Oil Account Performance Measurements

Days of Fuel Remaining?: 0

Days of Fuel Remaining?*

☒ Is the applicant currently out of fuel for this account?

< Previous

Next >

Step 6: Household Income Summary Entry

- If you used the “**Summary**” entry in the household breakdown (Step 4), use the “**Summary**” entry [here](#).
- The *Number of Household Members Receiving Income* defaults to the **total** number of adults in the household. Update this field if necessary and enter the **total monthly countable income** below.

Exit Start Over Validate Addresses

Application Steps

- Customer
- Mailing Address
- Physical Address
- Household
- Electricity
- Natural Gas
- Wood/Propane/Oil
- Income**
- Intake/Program

New Application Step 8 of 9: Household Income

Choose a Household Income entry type:

- ☒ Summary - Enter Total Monthly Income for the Household
- ☐ Individual Household Member Income (CSBG Data)

Household Income

Household Members Receiving Income*: 2

Monthly Income*: \$0.00

< Previous Next >

Step 6: Household Income Individual Entry

If you used the **“Individual”** entry in the household breakdown (Step 4), use the **“Individual”** entry here to breakdown the household income by household member.

- Click **Add** to create one Income entry for each household member.

Application Steps

- Customer
- Mailing Address
- Physical Address
- Household
- Electricity
- Natural Gas
- Wood/Propane/Oil
- Income**
- Intake/Program

New Application Step 8 of 9: Household Income

Choose a Household Income entry type:

- ☐ Summary - Enter Total Monthly Income for the Household
- ☒ Individual Household Member Income (CSBG Data)

Household Income List

Income Entries List

Recipient	Income Type	Pay Period	Supplied Amount
Click the add button to enter an income record.			

< Previous Next >

Step 6: Household Income Individual Entry

dressess

New Application Step 8 of 9: Household Income

Choose a Household Income entry type:

☐ Summary - Enter Total Monthly Income for the Household

☒ Individual Household Member Income (CSBG Data)

Household Income List

Recipient

Add New Income Record

Recipient:*

Income Type:*

Pay Period:*

Supplied Amount:*

Monthly Income:*

Comment:

< Previous Next >

The Income Recipient *dropdown table* is composed of the household members you added in Step 4 (if you used Individual entry).

- ❖ Select the *Income Type*, *Pay Period*, and enter the *Monthly (countable) Income*.

Step 7: Program/Payment

Exit Start Over Validate Addresses

Application Steps

- Customer
- Mailing Address
- Physical Address
- Household
- Electricity
- Natural Gas
- Wood/Propane/Oil
- Income
- Intake/Program**

New Application Step 9 of 9: Program/Payment

Program: 2016 FAST TRACK 2016
Program Year* Program*

Status: ELIGIBLE
Application Status*

Payment: \$246.00 \$254.00 \$500.00
Base Payment Supp. Payment* Total Payment*

Priority Points: 0

Intake: MAIL 1/14/2016 1/14/2016
Intake Location Intake Date* Certification Date*

Monthly Energy Cost*: \$266.67

Energy Burden: 13.33 %

Referral:
Referral Agency Staff Person

Program Demographics

Agency Defined 1: ☐

Agency Defined 2: ☐

Agency Defined 3: ☐

Agency Defined 4: ☐

Priority Offset: 0

Performance Measurements

Main Heating Fuel*: ELECTRIC

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?

< Previous Submit

Enter the **Program Information** and Click **Submit** when finished. If all the ServTraq validations are met, you will receive the **Application ID** after.

Saved Application

Once the application is saved successfully, it'll will open in **“Scroll”** Design. You can add additional Energy Accounts by clicking **“Additional Energy”** from the available application sections.

Save **Save and Close** **Add a Job** **Exit** **Delete** **Refresh** **Validate Addresses** **Check Status in CORE** **Application Details**

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
- CSBG

Edit Application
JULIE GARCIA, ApplicationID - 119101

Program/Payment/Intake

Customer: JULIE GARCIA ☒ Phone duplicate in PY?

Program: 2016 FAST TRACK 2016
Program Year* Program*

Status: DENIED APPLICANT ALREADY RECEIVED A BENEFIT THIS CALENDAR YEAR.
Application Status* Denial Reason

Payment: \$0.00 \$0.00 \$0.00
Base Payment Supp. Payment* Total Payment*

Priority Points: 0

Intake: MAIL 1/14/2016 1/14/2016
Intake Location Intake Date* Certification Date*

Language*: ENGLISH

Monthly Energy Cost*: \$266.67

Energy Burden: 13.33 %

Mailing Address

Line 1: 555 MAIN STREET
Care Of Address # Address Street/PO Box* Street Type

Line 2: APARTMENT 1
Building Type Unit Number

Line 3: 95076 WATSONVILLE SANTA CRUZ CA
Zip Code* City* County* State*








☒ Mailing Address is a duplicate for the program year

Additional Energy Accounts

You can add additional Energy Accounts by clicking “Additional Energy” from the available application sections.

The screenshot displays a web application interface. On the left, a sidebar lists various 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, and CSBG. The 'Additional Energy' section is selected. The main content area is titled 'Additional Energy Accounts' and shows a large blue box with a plus icon and the text 'No data to display'. Below this box, a summary bar indicates 'Additional Energy Cost total: \$0.00'. An 'Edit Form' dialog is open in the foreground, containing the following fields: 'Utility:' (a dropdown menu), 'Account Number:' (a text input field), 'Vendor:' (a dropdown menu), 'Monthly Cost:' (a numeric input field with up/down arrows), and 'Total Amt Due:' (a numeric input field with up/down arrows). The dialog also features a save icon (floppy disk) and a close icon (red X) at the bottom right.

Payment Assistance Related Sections

-  Referrals
-  Rejections
-  Notes
-  Commitments
-  Recertifications
-  Files
-  CSBG

Referrals

The **Referral** section is used to track applications referred from a **partner organization**.

The screenshot shows a web application interface for entering a new application. On the left is a sidebar with 'Application Steps' including Customer, Mailing Address, Physical Address, Household, Electricity, Natural Gas, Wood/Propane/Oil, Income, and Intake/Program (which is highlighted). The main area is titled 'New Application Step 9 of 9: Program/Payment'. It contains several input fields: Program (2016), Program Year* (FAST TRACK 2016), Status (ELIGIBLE), Application Status*, Payment (Base Payment: \$246.00, Supp. Payment*: \$254.00, Total Payment*: \$500.00), Priority Points (0), Intake (MAIL), Intake Location, Intake Date* (1/14/2016), Certification Date* (1/14/2016), Monthly Energy Cost* (\$266.67), Energy Burden (\$11,232.00), and a 'Referral' section with dropdowns for Referral Agency and Staff Person. Below this are 'Program Demographics' (Agency Defined 1-4, Priority Offset: 0) and 'Performance Measurements' (Main Heating Fuel*: ELECTRIC, Secondary Heating Fuel(s) with checkboxes for ELECTRIC, KEROSENE, OTHER, WOOD, FUEL OIL, NATURAL GAS, PROPANE, and two questions about CalFresh and WSAG/POW submission). At the bottom are '< Previous' and 'Submit' buttons.

Referral Entry Options:

1. Enter Referral Agency information in the **Program/Payment** section.
2. **Manually** entered after saving the application in the referral section.



The screenshot shows a web application interface for the 'Referrals' section. It features a table with the following columns: Referral Org, Referral Staff, Note, Entry Date, Entered By, Last Updated Date, and Last Updated By. Below the table, there are input fields for 'Referral Org' (set to SALVATION ARMY), 'Referral Staff' (set to GLORIA X), and a 'Note' field. At the bottom right, there are icons for saving (a floppy disk) and closing (a red X).

Rejections

The **Rejection** section is used to track and clear rejected Payment Assistance Applications in **CORE**. Manual entry is **required**.

Rejections

Rejection Reason	CORE Note	User	Transfer Date	Clear Date
<div>Rejection Reason: User:</div> <div>A PRIOR APPLICATION EXISTS FOR THIS CUSTOMER AND PROGRAM YEAR ACCOUNT NUMBER IS NOT IN UTILITY COMPANY FORMAT AGENCY OUT OF FUNDS FOR COUNTY APPLICANT IS DECEASED APPLICATION IS A DUPLICATE FOR THIS PROGRAM YEAR APPLICATION IS NOT SIGNED APPLICATION MUST BE CREATED WITHIN 120 DAYS OF CERTIFICATION DATE</div>	<div>CORE Note:</div>		<div>Transfer Date: 7/8/2016</div>	






Rejections

	Rejection Reason	CORE Note	User	Transfer Date	Clear Date
   	SSN IS A DUPLICATE FOR THE PROGRAM YEAR		GLADYS ROJAS	7/8/2016	

Notes

The **Notes** section allows *additional* space for miscellaneous comments.



Notes					
	Note	Entry Date	Entered By	Last Updated Date	Last Updated By
  	CUSTOMER WOULD ONLY LIKE TO BE CONTACTED ON MWF BETWEEN THE HOURS OF 10AM-12PM	12/29/2016	GLADYS ROJAS	12/29/2016	GLADYS ROJAS






Commitments

The Commitment section is used to log information about a pledge placed on a customer's account. By logging a commitment, the customer's information is sent to the **Commitment Report**.

Commitments

	Memo	Date Submitted	Entry Date	Entered By	Last Updated Date	Last Updated By
<p>Commitment Note:</p> <div>A COMMITMENT FOR \$271 WAS PLACED ON 12/21/16 TO PG&E, SPOKE WITH AMANDA LOPEZ.</div> <div></div>						

Commitments						
	Memo	Date Submitted	Entry Date	Entered By	Last Updated Date	Last Updated By
  	A COMMITMENT FOR \$271 WAS PLACED ON 12/21/16 TO PG&E, SPOKE WITH AMANDA LOPEZ.		12/29/2016	GLADYS ROJAS	12/29/2016	GLADYS ROJAS

Commitment Report

A **Commitment Report** is used to track *commitments/pledges* placed on customers accounts. This report can be made available to the corresponding utility company to streamline the process.

(Note: These are options available, but not **all** utility companies accept all methods.)

To: PACIFIC GAS & ELECTRIC COMPANY

From: TEST AGENCY

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 333
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

Recertification

If Eligibility for WX Services is derived from a HEAP application, use the ***Recertification*** section to log the eligibility recertification date. The 120 day count from Certification to Assessment date will **restart** to the date entered.

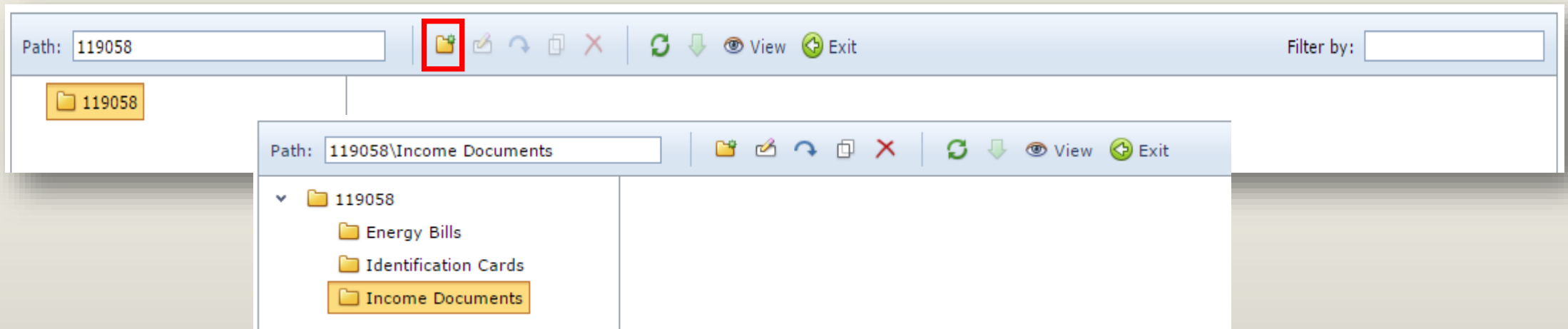
Recertifications

Eligibility Recertification Date	Eligibility Recertification Note	Eligibility Recertification Method	Entry User	Entered Date
Eligibility Recertification Date:* 12/30/2016	Eligibility Recertification Note: INCOME HAS NOT CHANGED	Eligibility Recertification Method:* MAIL		



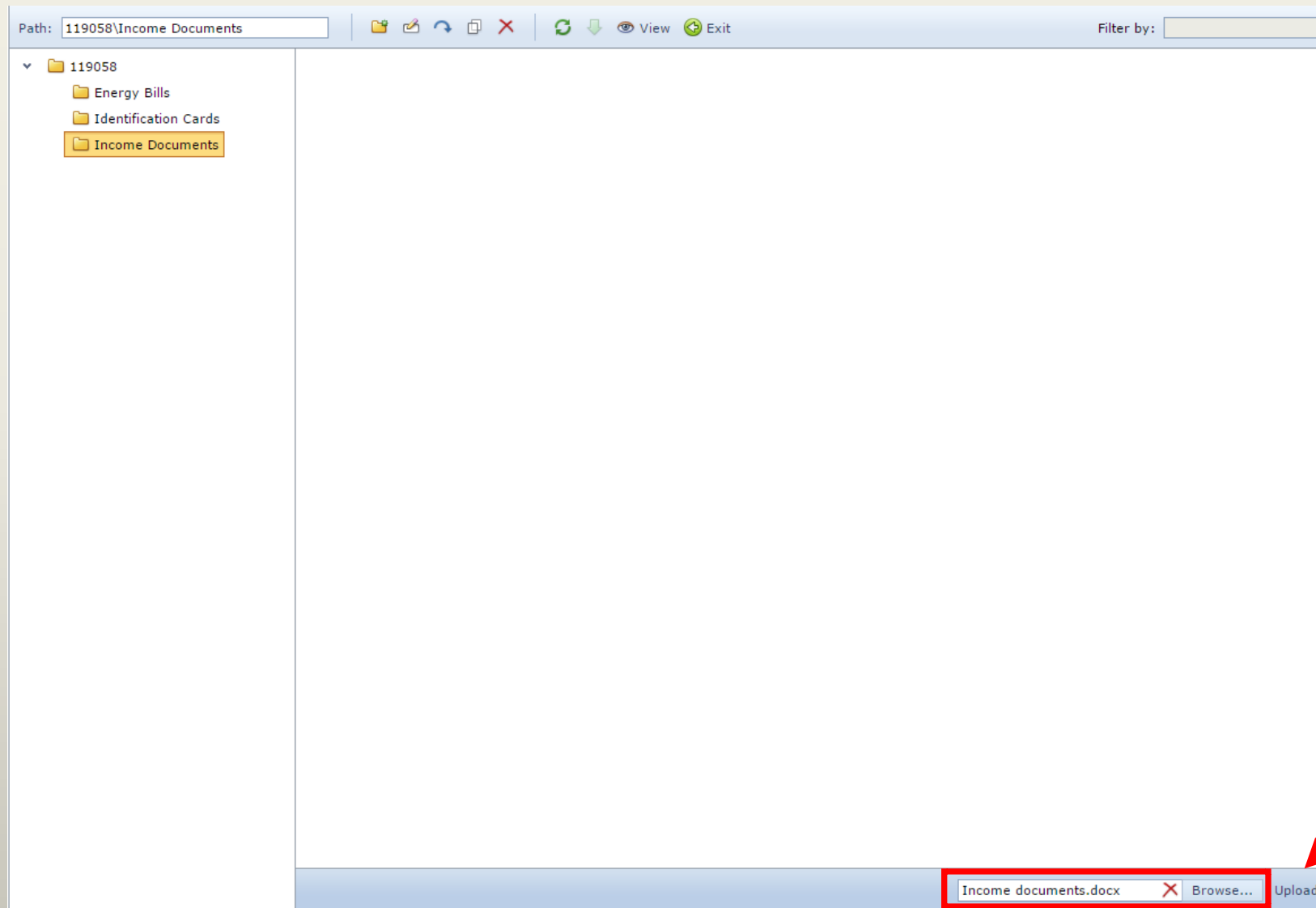
Files

The **Files** section allows users to **upload** and **attach** documents to Payment Assistance Application that have been entered and saved in ServTraq.



Note: You can create **specific folders** to upload documents by clicking on the **folder** icon.

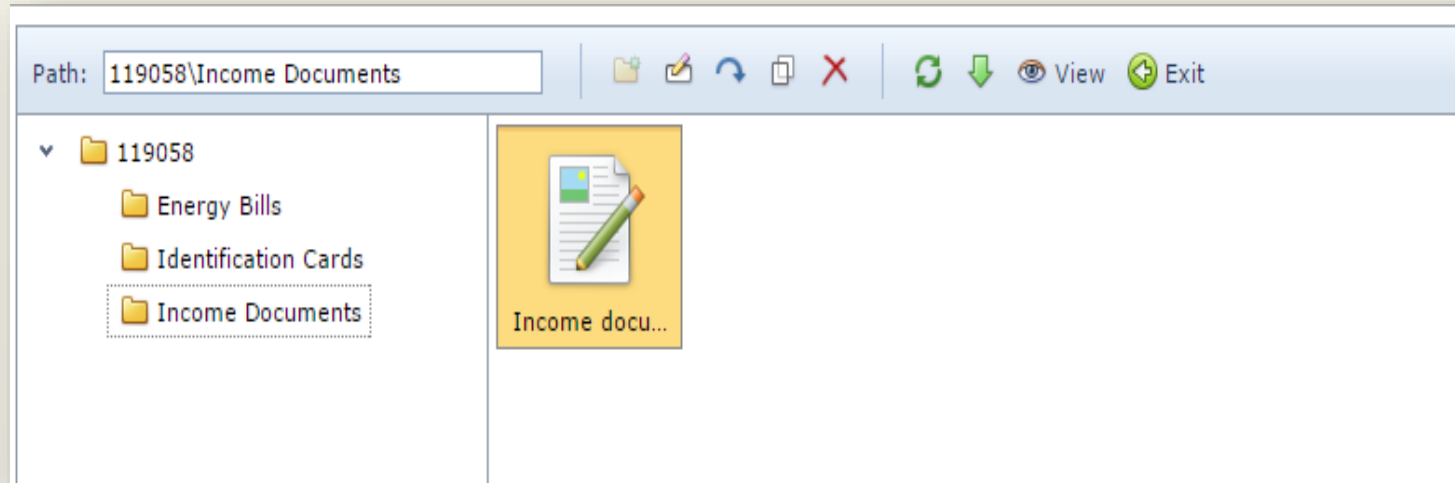
Files



To Upload Files:

- **Select** the folder to upload file.
- Click the **Browse** button and select file to upload
- Click **Upload** to save in ServTraq.

Files



Symbol Icon	Meaning
	Rename the document uploaded
	Move – the document to another folder
	Copy – make a copy of the document uploaded and save it into another folder.
	Delete the document upload
	Refresh page
	Download documents uploaded
	Detail View or Thumbnail View of documents uploaded
	Exit File Manager

CSBG

If you are using the Household Individual Entry during Payment Assistance Data Entry, you do not need to use this section to re-enter **CSBG Information**.

The screenshot shows a web browser window with the URL <https://www.servtraqazure.com/ApplicationCSBGRecord.aspx?ApplicationID=119139&mac=a1107a0277b197ecc7f65d05242c94f9>. The browser's address bar and tabs are visible. The page title is "Central Coast Energy Services, Inc. [US]". The browser's menu bar includes "Save", "Save and Close", "Exit", "Delete", and "Refresh".

The main content area is titled "Add CSBG Information" and "New CSBG Information". It contains a section titled "CSBG Demographics" with the following fields:

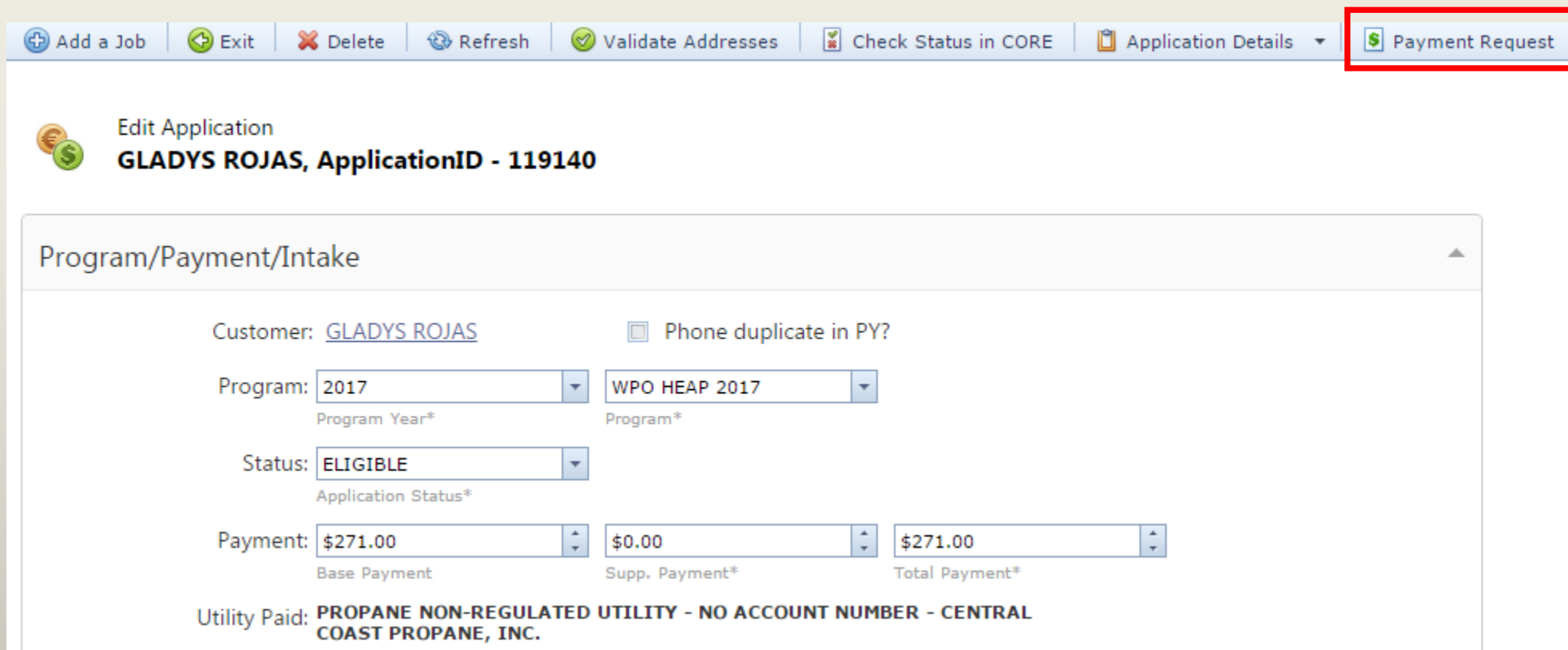
- Household Size: 1
- Age 0 to 5: 0
- Age 12 to 17: 0
- Age 24 to 44: 1
- Age 55 to 69: 0
- Disabled: 0
- Seasonal Fwkr: 0
- Family Type: SINGLE PERSON
- Age 6 to 11: 0
- Age 18 to 23: 0
- Age 45 to 54: 0
- Age 70+: 0
- Farmer: 0
- Migrant Fwkr: 0
- Owner/Renter: OWNER OCCUPIED

Below the "CSBG Demographics" section are the following sections:

- Gender**
 - Male: 0
 - Female: 1
- Ethnicity**
 - Hispanic: 1
 - Non-Hispanic: 0
- Race**
 - White: 0
 - Black/Afr. Amer.: 0
 - Hawaiian/Pac. Isl.: 0
 - Multi-Race: 0
 - Asian: 0
 - Amer. Ind./Alaskan: 0
 - Other: 0
- Education Level of Adults (Age 24 and over)/Health Insurance**
 - 0-8 Grade: 0
 - High School Grad./GED: 0
 - 2/4 Year College Grad.: 0
 - 9-12 Grade: 0
 - 12+: 1
 - # Persons w/Health Ins.: 0

WPO Payment Request

ServTraq offers user the ability to create *WPO Payment Request* right from the application, which *formalizes* the Fiscal request for payment.



The screenshot shows the ServTraq application interface. At the top, a navigation bar contains several buttons: 'Add a Job', 'Exit', 'Delete', 'Refresh', 'Validate Addresses', 'Check Status in CORE', 'Application Details', and 'Payment Request'. The 'Payment Request' button is highlighted with a red rectangular border. Below the navigation bar, the main content area is titled 'Edit Application' and displays the application details for 'GLADYS ROJAS, ApplicationID - 119140'. The form is organized into sections. The first section, 'Program/Payment/Intake', contains the following fields: 'Customer: GLADYS ROJAS' with a checkbox for 'Phone duplicate in PY?'; 'Program: 2017' (Program Year*) and 'WPO HEAP 2017' (Program*); 'Status: ELIGIBLE' (Application Status*); and 'Payment: \$271.00' (Base Payment), '\$0.00' (Supp. Payment*), and '\$271.00' (Total Payment*). The 'Utility Paid' field is set to 'PROPANE NON-REGULATED UTILITY - NO ACCOUNT NUMBER - CENTRAL COAST PROPANE, INC.'

WPO Payment Request

Start by clicking on the **Payment Request** button> a small window appears enter the Fund and Account you want to use (Typically, these are provided by **Accounting**)> click **Submit**.

The screenshot shows a web application interface for editing an application. At the top, a navigation bar contains several buttons: 'Add a Job', 'Exit', 'Delete', 'Refresh', 'Validate Addresses', 'Check Status in CORE', 'Application Details', and 'Payment Request'. The 'Payment Request' button is highlighted with a red rectangle. Below the navigation bar, the main content area is titled 'Edit Application' and shows 'GLADYS ROJAS, ApplicationID - 119140'. The form is titled 'Program/Payment/Intake' and contains several fields: 'Customer: GLADYS ROJAS', 'Program: 2017', 'Status: ELIGIBLE', 'Payment: \$271.00', 'Utility Paid: PROPANE NON-RE...', 'Priority Points: 0', 'Intake: MAIL', 'Language*: ENGLISH', 'Monthly Energy Cost*: \$30.00', and 'Energy Burden: 3.33 %'. A modal window titled 'Enter the payment request data below' is open in the center, containing fields for 'Fund:', 'Account:', and 'Special Instructions:'. The 'Submit' button in the modal is highlighted with a red rectangle.

IMPORTANT!!!!!!

One time option! Make sure all information is correct before clicking **Submit**.

WPO Payment Request

Example of a Payment Request.

Page 1 of 1 PDF

TEST AGENCY

PR Date: 1/4/2017 **Payment Request** **Pmt Request Number:** 26737

Prepared by: GLADYS ROJAS

<u>Vendor ID</u>	<u>Vendor Name</u>
CCPROP	CENTRAL COAST PROPANE, INC.

<u>Invoice #</u> 119140	<u>InvoiceDate</u> 1/4/2017	<u>Invoice Total</u> \$271.00
-------------------------	-----------------------------	-------------------------------

<u>Item Description</u>	<u>Item Amount</u>	<u>Fund</u>	<u>Account</u>	<u>Account Description</u>
ROJAS, GLADYS - NO ACCOUNT NUMBER	\$271.00	100	57010	PROPANE
Fund/Acct Total:		\$271.00		
Items Total:		\$271.00		

Pmt Request Total:\$271.00

<u>Vendor ID:</u>	CCPROP	<u>Acct:</u>	
<u>Mailing Address</u>	CENTRAL COAST PROPANE, INC.	<u>Phone:</u>	(805) 237-1001
	PO BOX 3152	<u>Fax:</u>	(805) 467-2423
	PASO ROBLES CA 93447		

<u>Authorized Approval:</u> _____	<u>Date:</u> _____
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The Payment Request generates with the information entered during Payment Assistance Data Entry.

- Invoice # equals the Application ID Number/ACC.
- Invoice Total & Pmt Request Total equals the Awarded Amount.
- Vendor Information populates as selected **during** data entering.

CSD 43 Form

ServTraq offers users the ability to print out a completed CSD 43 Form **after** a payment assistance application has been entered.

The screenshot displays the ServTraq application interface. The top toolbar includes buttons for Save, Save and Close, Add a Job, Exit, Delete, Refresh, Validate Addresses, Check Status in CORE, and **Application Details** (highlighted with a red box). The left sidebar shows a 'Sections' menu with options like Program/Payment/Intake, Mailing Address, POS Address, Household, Electricity, Natural Gas, Wood/Propane/Oil, Additional Energy, Income, Performance Measure, Referrals, Rejections (highlighted), Notes, Commitments, Recertifications, Files, and CSBG. The main content area is titled 'Edit Application' for 'MARIA ABARCA, ApplicationID - 119141'. Below this, the 'Program/Payment/Intake' section contains the following fields:

- Customer: MARIA ABARCA
- Program: 2017 (Program Year*)
- Status: ELIGIBLE (Application Status*)
- Payment: \$308.00 (Base Payment)
- Supp. Payment*: \$0.00
- Total Payment*: \$308.00
- Utility Paid: SUBMETERED - NO ACCOUNT NUMBER
- Priority Points: 23
- Intake: MAIL (Intake Location)
- Intake Date*: 1/2/2017
- Certification Date*: 1/2/2017
- Language*: ENGLISH
- Monthly Energy Cost*: \$30.00
- Energy Burden: 2.00 %

Click on **Application Details**> Select the from the *PDF* or *Excel Format* to print.

Full and Partial Credit Return Payment Adjustments

Payment Assistance applications **rejected** in CORE due to a **Full** or **Partial Credit Returns** can be reconciled in ServTraq through the **Credit Return Payment Update** feature. Upon adjusting a payment amount, the **Payment Assistance Expenditures** report is also updated.

Returned Payments (Variance) Report

Program(s): HEAP
 Program Year: 2016
 Return Type(s): Partial Credit Return, Full Credit Return
 Starting Returned Payment Date: 1/1/2016
 Ending Returned Payment Date: 1/31/2017

Program	Return Type	Utility	ACC	Name	SSN	Address	BBA	Supp.	Paid	Returned	Actual Paid	Returned Date
San Mateo - 2016 HE	Full	PGE	145922	PATRICIA WATKINS	2725	1101 NATIONAL 1430	\$184	-	\$184	\$184.00	-	12/12/16
San Mateo - 2016 HE	Full	PGE	146165	JACQUELYN BERL	6255	77 N ELLSWORTH2	\$246	-	\$246	\$246.00	-	12/12/16
30 day	2						\$430	-	\$430	\$430.00	-	
San Mateo - 2016 HE	Partial	PGE	146393	YVONNE ARNOLD	0532	3584 ROLISON5	\$307	-	\$307	\$68.53	\$238.47	11/14/16
San Mateo - 2016 HE	Full	PGE	146722	ROSALIE ROO	9782	2604 FLORES321	\$307	-	\$307	\$307.00	-	11/14/16
60 day	2						\$614	-	\$614	\$375.53	\$238.47	
San Mateo - 2016 HE	Full	PGE	148755	SHIH FEN TSUANG	9661	77 WESTBOROUGH 123	\$307	-	\$307	\$307.00	-	10/26/16
90 day	1						\$307	-	\$307	\$307.00	-	
Monterey - 2016 HE	Full	PGE	143816	JAVIER CASTRO	2661		\$273	-	\$273	\$273.00	-	05/08/16
Monterey - 2016 HE	Full	PGE	143940	CECILIA DIAZ	7845		\$273	-	\$273	\$273.00	-	05/08/16
San Mateo - 2016 HE	Full	PGE	142421	NORMA RODRIGUEZ	6617		\$246	-	\$246	\$246.00	-	04/07/16
90+ day	3						\$792	-	\$792	\$792.00	-	
Total:	8						\$2,143	-	\$2,143	\$1,904.53	\$238.47	

Payment Assistance Expenditures Active PA Programs

Program: FAST TRACK 2015

Allocation Amt	Benefit Actual	Pct Exp	\$ Remaining	HH Remaining
\$1,841,779.00	\$1,828,586.64	99.28%	\$13,192.36	33
EB Avg	Vul Pop %	Avg Benefit	Avg HH Size	HH Served
18.26%	60.44%	\$399.43	3	4578

Program: FAST TRACK 2016

Allocation Amt	Benefit Actual	Pct Exp	\$ Remaining	HH Remaining
\$1,468,019.00	\$1,144,618.84	77.97%	\$323,400.16	771
EB Avg	Vul Pop %	Avg Benefit	Avg HH Size	HH Served
17.50%	59.05%	\$419.58	3	2728

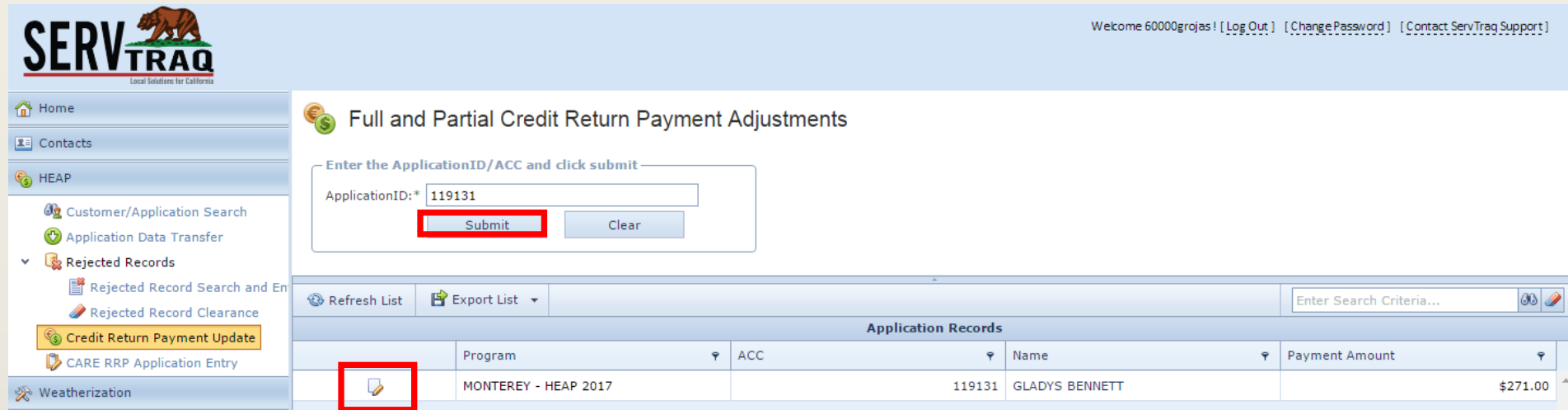
Program: FAST TRACK 2017

Allocation Amt	Benefit Actual	Pct Exp	\$ Remaining	HH Remaining
\$1,085,273.00	\$8,989.00	0.82%	\$1,076,284.00	1,916
EB Avg	Vul Pop %	Avg Benefit	Avg HH Size	HH Served
13.71%	56.25%	\$561.81	2	16

Program: HEAP 2015

Allocation Amt	Benefit Actual	Pct Exp	\$ Remaining	HH Remaining
\$1,353,277.00	\$1,337,862.36	98.86%	\$15,414.64	61

Full and Partial Credit Return Payment Adjustments



WELCOME 60000grojas! [Log Out] [Change Password] [Contact ServTraq Support]

SERVTRAQ
Local Solutions for California

Home
Contacts
HEAP
Customer/Application Search
Application Data Transfer
Rejected Records
Rejected Record Search and Entry
Rejected Record Clearance
Credit Return Payment Update
CARE RRP Application Entry
Weatherization

Full and Partial Credit Return Payment Adjustments

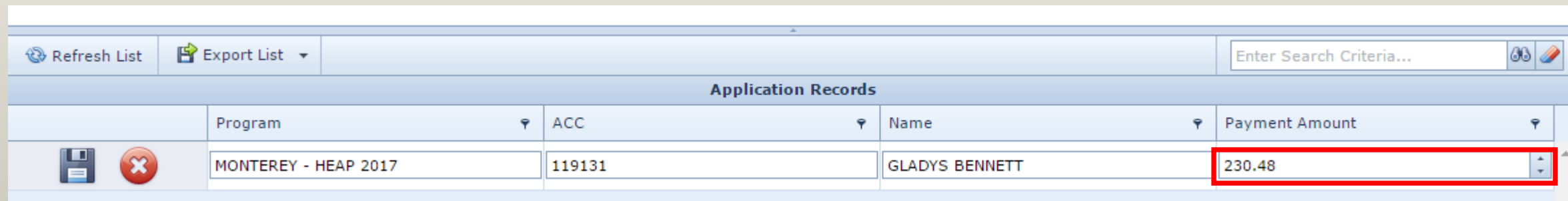
Enter the ApplicationID/ACC and click submit

ApplicationID:*

Refresh List Export List Enter Search Criteria...

	Program	ACC	Name	Payment Amount
	MONTEREY - HEAP 2017	119131	GLADYS BENNETT	\$271.00

Click on **Credit Return Payment Update** tab, under HEAP menu. Enter the **Application ID/ACC** and click **Submit**. To make a payment adjustment to the account click on the **paper and pencil icon**.



Refresh List Export List Enter Search Criteria...

	Program	ACC	Name	Payment Amount
	MONTEREY - HEAP 2017	119131	GLADYS BENNETT	230.48

Edit the payment amount to reflect the **actual amount paid** to the customer, for **full credit returns** enter **\$0**. Click on the **floppy disc** icon to **save** the adjustments entered.

Full and Partial Credit Return Payment Adjustments

Refresh List	Export List	Enter Search Criteria...			
Application Records					
	Program	ACC	Name	Payment Amount	
	MONTEREY - HEAP 2017	119131	GLADYS BENNETT	\$230.48	

To view the adjustment made to the customer record click on the **Application ID/ACC**.

Central Coast Energy Services, Inc. [US] | <https://www.servtraqazure.com/Application.aspx?ApplicationID=119131&CustomerID=27051&mac=cb0235e560e58c5326643d50e03a6e8d>

Save Save and Close Add a Job Exit Delete Refresh Validate Addresses Check Status in CORE Application Details

Sections

- Program/Payment/Intake
- Mailing Address
- POS Address
- Household
- Electricity
- Natural Gas
- Wood/Propane/Oil
- Additional Energy
- Income
- Performance Measure
- Referrals
- Rejections
- Notes
- Commitments
- Recertifications
- Files
- CSBG

Edit Application
GLADYS BENNETT, ApplicationID - 119131

Program/Payment/Intake

Customer: GLADYS BENNETT ☐ Phone duplicate in PY?

Program: 2017 HEAP 2017
Program Year* Program*

Status: **TRANSFERRED** 1/3/2017 11:55:11 AM
Application Status* Transfer Date

Payment: \$230.48 \$0.00 \$230.48
Base Payment* Supp. Payment* Total Payment*

Utility Paid: **PACIFIC GAS & ELECTRIC COMPANY - 67757246532**

Priority Points: 11 ⓘ

Intake: MAIL 12/19/2016 12/19/2016
Intake Location Intake Date* Certification Date*

Language*: ENGLISH ⓘ

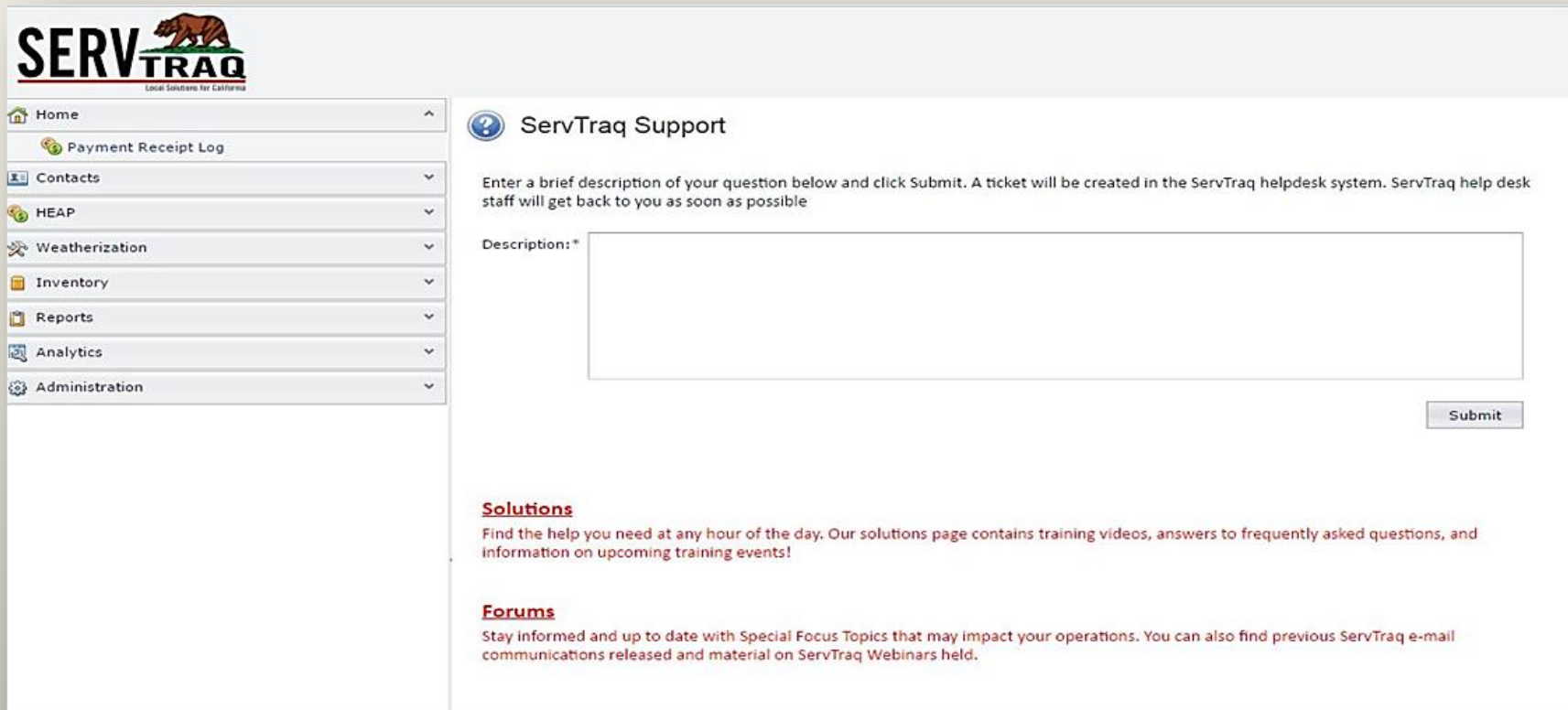
Monthly Energy Cost*: \$2.00

Energy Burden: 16.67 %

Note: The **New** Payment Amount and Status will *automatically* be adjusted.

Questions

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



The screenshot shows the ServTraq Support page. On the left is a navigation menu with the following items: Home, Payment Receipt Log, Contacts, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. The main content area is titled 'ServTraq Support' and contains a text box for a description, a 'Submit' button, and links to 'Solutions' and 'Forums'.

SERV **TRAQ**
Local Solutions for California

Home
Payment Receipt Log
Contacts
HEAP
Weatherization
Inventory
Reports
Analytics
Administration

ServTraq Support

Enter a brief description of your question below and click Submit. A ticket will be created in the ServTraq helpdesk system. ServTraq help desk staff will get back to you as soon as possible

Description: *

Submit

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.