

ServTraq(c) 15 Day Written Notification Solution February 10, 2016

Overview



The goal of this webinar is to review the **Contact Entry** and present new features designed to streamline compliance with the **15Day Written Notification** requirement.

What is the **Contact Entry**?

The **Contact Entry** is a feature in ServTraq that enables agencies to track all incoming and outgoing customer contact. When codes are applied to *contact entries*, subsequent tasks such as document mail-outs can be streamlined, and registered in the system for **electronic proof of compliance**.

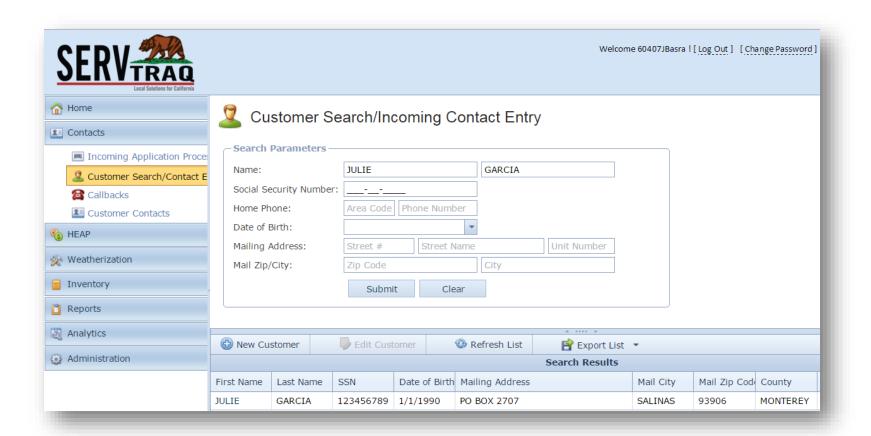
- ✓ Generate Barcoded HEAP Applications
- ✓ Track Receipt of Incoming Applications
- ✓ Streamline Written Notification Letter Compliance

Part 1 **Generate a Barcoded HEAP Application**

Customer Search



Step 1: Search for the customer. If the customer is not found, add the customer to the database.



Contact Entry for Barcoded Application



Step 2: Add a **Contact Entry Note** to generate a barcoded application using a mailing code.

Mailing codes can be customized for your agency.

To set mailing codes that generate barcoded HEAP Applications contact the support desk.

Conta	cts									
			Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
\	(×	1/27/2016	INCOMING	APPLICATION REQUESTED	APPLICATION REQUEST	ENGLISH		AP - FIRST TIME(HEAP APPLICATION) WITH INSTRUCTIONS	
V	(×	1/14/2016	OUTGOING	PROGRAM/APPLICATION INFO GIVEN	NO ACTION REQ - RECORD ONLY	ENGLISH	DENIAL ADDED FROM APPLICATION ENTRY	DX DENIAL LETTER (OVER INCOME) - (W/O) WSAG-CARE	
V	⊕	×	1/11/2016	INCOMING	APPLICATION REQUESTED	APPLICATION REQUEST	ENGLISH		AP - FIRST TIME(HEAP APPLICATION) WITH INSTRUCTIONS	

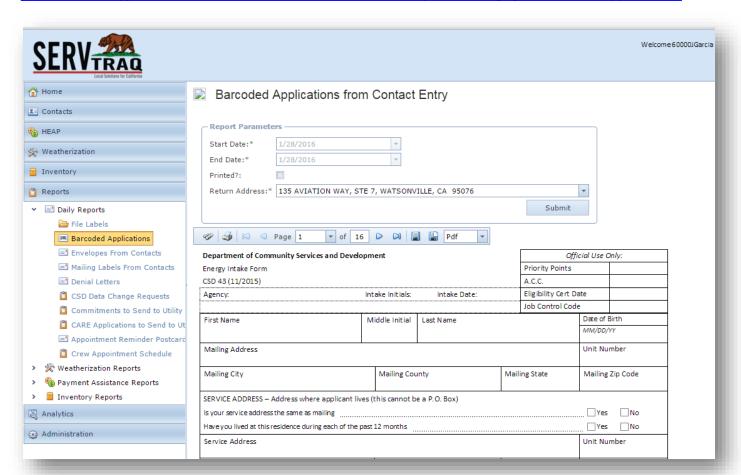
Printing Barcoded Applications



Step 3: Under the Reports menu select Daily Report - Barcoded Applications.

Print Settings Information can be found at:

https://servtrag.freshdesk.com/solution/articles/4000070203-print-settings-for-barcoded-applications



ServTraq Barcoded Applications



Front

Department of Communit	rtment of Community Services and Development								Official Use Only:		Only:		
Energy Intake Form										Priority Point	s		
CSD 43 (11/2015)										A.C.C.			
Agency:					nitials:	Intake Date:				Eligibility Cert D			
										Job Control Code			
First Name			N	/iddle	Initial	al Last Name					Date of	Birth	
										MM/DD	/γγ		
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Mailing City				Mai	iling Co	unty Mailing State			ing State	Mailing Zip Code			
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E-mail Address (Optional):	:												
PEOPLE LIVING IN HOUSEHO	OLD.					$\overline{}$	INC	OME					
Enter the total number of							INC						
the household, inc	luding the								er the number of household embers who receive income				
applicant								•					
Demographics - Enter the	number of	people w	ho are:				Enter	total gross m	onthly.	income for all pe	ople living i	n the household:	
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Ages 3 to 5 Years							SSI / SSP			\$			
Ages 6 to 18 Years							SSA / SSDI			\$			
Ages 19 to 59							Paycheck(s)			\$			
Ages 60 and Older						\top	Interest			Ś			
Disabled						+	Pension			Ś			
Native American						+	Other			Ś			
Seasonal or Migrant Farm	worker	_				+	Total Income			Ś			
HOUSEHOLD MEMBERS							Tota	illicome			4		
FULL NAME: Full name is F			ne										
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AMOUNT OF MONTHLY GRO											ing else is ta	ken out.	
If you have more than 8 peo	ple in your	househo	old, you	_									
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				1									
				_									
Household Total Monthly	Gross Inc	come							\$				

Back

TEST AGENCY 135 AVIATION WAY, STE 7 WATSONVILLE CA 95076



E AP
JULIE GARCIA

555 MAIN ST APT 1 WATSONVILLE CA 95076

Mailing Date



Once the Barcoded Application has been printed, this will automatically post a Mailing Date to the contact action added.

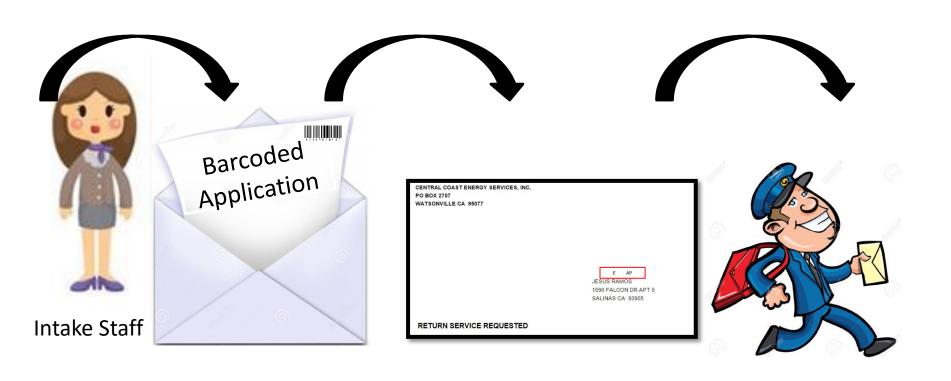
Contact	5									
			Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
	(×	1/26/2016	INCOMING	APPLICATION REQUESTED	APPLICATION REQUEST	ENGLISH		AP - FIRST TIME(HEAP APPLICATION) WITH INSTRUCTIONS	1/27/2016
□	(×	4/3/2015	OUTGOING	PROGRAM/APPLICATION INFO GIVEN	NO ACTION REQ - RECORD ONLY	ENGLISH	ADDED FROM APPLICATION ENTRY	AX - ASSURANCE 16 ONLY - (W/O) WSAG - (W/O)CARE	4/3/2015
	Ð (K	3/27/2015	INCOMING	HEAP APPLICATION RECEIVED	NO ACTION REQ - RECORD ONLY	ENGLISH	CONTACT ACTION ADDED FROM APPLICATION RECEIVING SCREEN		

Send Application



Step 4: Make the application available to the customer.

If application is mailed, use Double Window Envelopes size 10.

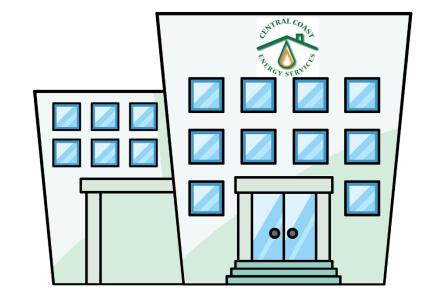


Part 2 **Received HEAP Applications**

Incoming Applications



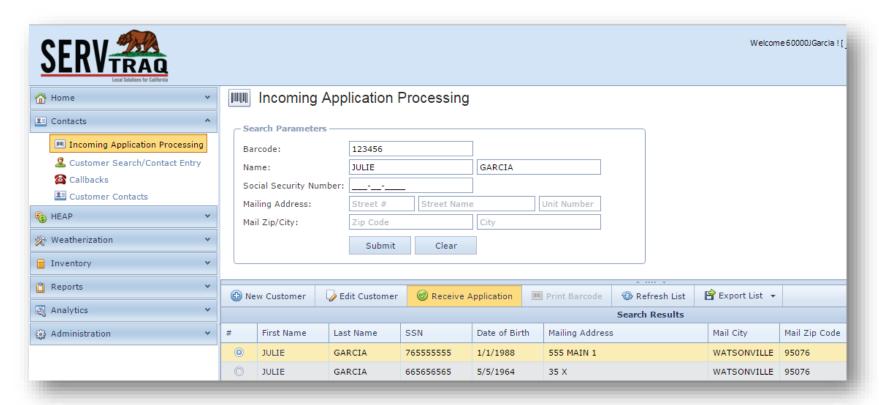
- Mail
- Fax
- Email
- Walk-In
- Online
 - Caliheapapply.com
- Appointment/Workshop



Receiving Barcoded Applications



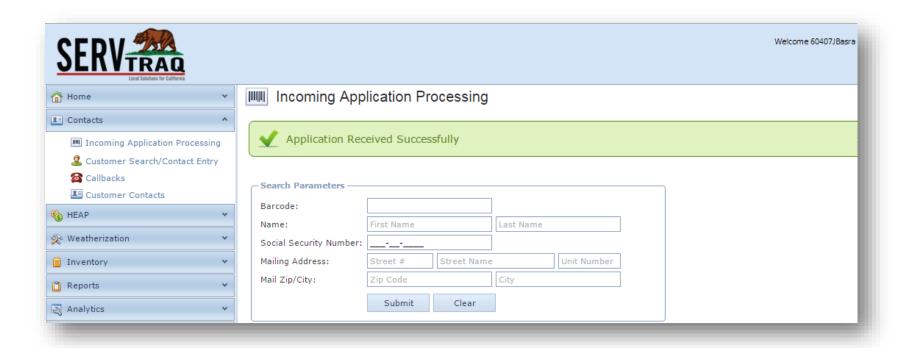
Step 1: Under the **Incoming Application Processing Screen,** place the curser under the Barcode field, and scan the barcode. The customer record linked to that barcode number will populate. Verify the customer record in ServTraq and the applicant are the same person. If so highlight the customer and click **Receive Application**



Receiving Barcoded Applications



Once the application has been received a green check will appear



Receipt of HEAP Application



This will automatically create a Contact Entry Note in ServTraq tracking the receipt of the application. This would meet the electronic version of CSD proof of notification check. Written approval has been posted to the ServTraq Support Portal.

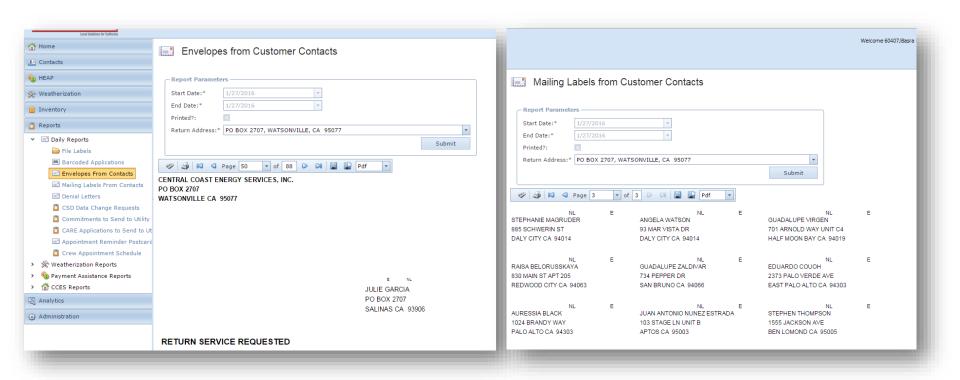
Co	ontacts								
		Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date
		12/5/2015	INCOMING	HEAP APPLICATION RECEIVED	NO ACTION REQ - RECORD ONLY	ENGLISH		NL - WRITTEN NOTIFICATION LETTER	12/10/15
	₽ ⊕ ×	2/7/2014	OUTGOING	PROGRAM/APPLICATION INFO GIVEN	NO ACTION REQ - RECORD ONLY	ENGLISH	ADDED FROM APPLICATION ENTRY	AS ASSURANCE 16 + (WITH) WSAG - (W/O)CARE	2/7/2014
F	₽ ⊕ ×	1/23/2014	OUTGOING	DEFICIENT APPLICATION PROCESS	NO ACTION REQ - RECORD ONLY	ENGLISH		IM - DEFICIENT (INCOMPLETE)	1/23/2014
	₯ ⊕ ₩	1/13/2014	INCOMING	APPLICATION REQUESTED	NO ACTION REQ - RECORD ONLY	ENGLISH		CP - HEAP/CARE/WX/WDR APPLICATION PACKAGE	1/13/2014

A mailing date is posted to the receipt contact entry when the user processes mailings and marks records as being sent. ServTraq mailing envelopes, labels, or e-mails can be generated from the system.

Notification Mail-Outs



Mailing Envelopes or Labels with the NL (Notification Letter) mailing code.



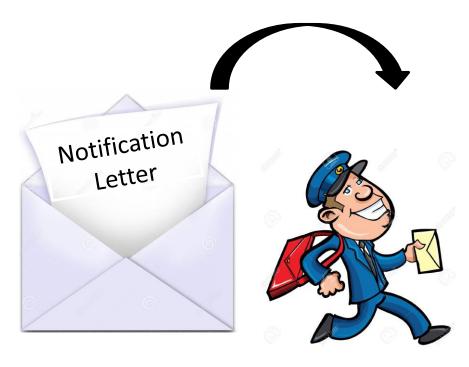
Mail-Out



Step 7: The mail code noted on the envelope identifies the type of document to mail out.

Pre-Assembled Notification Letters





Notification Letter





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

Part 3 **Other Information**

Miss-Matched Information



If the barcode brings up a different customer record than the person listed on the application, **search for applicant** to receive the application under the person who applied.

If the customer is not found, add the customer to the database first.

A new barcode linked to the correct customer can be printed and placed over the existing one.

For Name: Antonio T	DY412 Mode	Initial: F Last Name: T	P.Tim
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MARINE CENT PAPERS	Malline County: S. D.W.	TA CRU Mailing States Cf	Mailing Zip Code: 95003
Service Address if creme and from	escret.		Unit Number:
"Same as above (Do not use P.O. Service City:	Service County:	Service State:	Service Zip Code:
		CA	
hone Numbers: Nork/Daytime # (\$5) 1 700 ** tome # ()	SU40 Applicant's Day	Month Sylvenia	t time to reach you? Afternoon [fuerong
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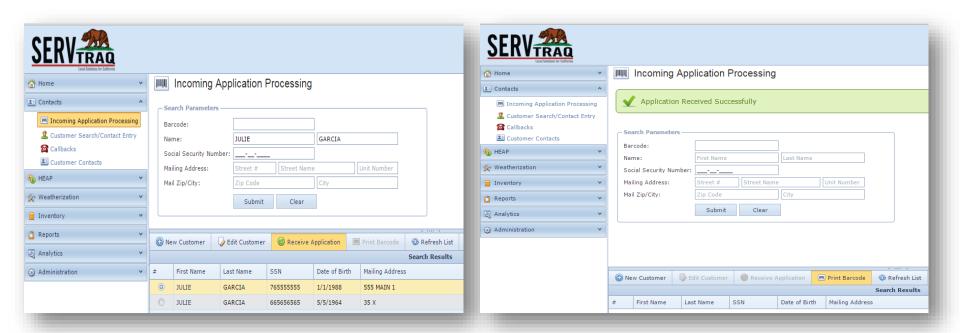
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Applications without a Barcode



For applications without a barcode, a manual search will be necessary before they can be marked as received.

- Under the Incoming Application Processing screen enter the available customer information to run a search.
- If the customer is found click Receive Application
 - click Print Barcode to generate a barcode label (optional).



Barcode Purpose



Facilitates customer record look-up in ServTraq by quickly displaying the customer linked to the barcode number.

NOTE: THE BARCODE NUMBER IS AN APPLICATION <u>CONTACT</u> RECEIPT. IT IS NOT A CUSTOMER OR APPLICATION ID.

Other Possible Messages



Red: A red message means that a previous application was received within the last 24 hours.



Yellow: A yellow message means that the customer has a benefited UA application for the current program year.





Coming Soon

E-Mail Notifications



="
end Cc
Subject
Dear Customer, We have receiv receive another It can take as lo continue to ma Thank you, Central Coast E

Scanner



Barcode Scanner

Recommended: Honeywell MS7120 Orbit Barcode Scanner (MK7120-31A62)



Label Machine



Label Machine

Recommended: Dymo Label
 Writer 400



Label Size

• Dymo 30572 (3 ½" X 1 1/8")



ServTraq Support



Welcome 60407Jgarcia![Log Out] [Change Password] [Contact ServTraq Support]



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:*

Email: Support@ServTraq.com

Phone: (831) 761-1747

Submit

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