



2016 HEAP Application Data Entry Webinar

January 19, 2016

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 MM/DD/YY	Amount of Monthly Income	Source of Income
				\$0.00	3/5/2014
				\$0.00	12/1/2014
				\$0.00	3/26/2015
					12/30/2015


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



Home
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Credit Return Payment Update
CARE RRP Application Entry
Weatherization
Inventory
Reports
Analytics
Administration

Welcome 60407Jgarcia ! [Log Out]

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

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

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

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 MI 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: 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

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:
Address #* Address Street* Street Type

Line 2:
Building Type Unit Number

Line 3:
Zip Code* City* County* State*

US Census Tract:   Click the magnifying glass to generate LIWP leads from HEAP Applications.

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

☒ Has the customer lived at this Address for the past 12 months? **NEW! CSD Intake Question.**

< Previous Next >

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


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*:

Tenancy*:

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

Idresses

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 Step 8-*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

Electric Account Information

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

Bill Name: JULIE GARCIA

First Name* MI Last Name*

Bill Address: 555 MAIN STREET APARTMENT 1 WATSONVILLE 95076 CA

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

Bill Costs: 30 \$0.00 \$100.00 \$500.00

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

Pledge/CARE (RRP): 1/13/2016 ☐ Pledge Already Made? YES 5/30/2020

Pledge Date RRP?* RRP Exp. Date

Electric Account Performance Measurements

☒ Is Electricity Shut Off?

☒ Is there a Past Due Notice for this account?

☐ Are the Utilities All Electric?

NEW! CSD Intake Questions.

< Previous Next >

❖ 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? RRP Exp. Date 5/30/2020

Natural Gas Account Performance Measurements

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

NEW! CSD Intake Questions.

< 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 option from the following—

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 >

NEW! CSD Intake Questions.

Step 8: 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 8: 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 8: Household Income Individual Entry

dresses

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:

JULIE GARCIA

MANUEL GARCIA

SANTIAGO GARCIA

0

0.01

< 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 9: 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.

Error Message Received

If you receive an Error Message, you'll need to correct the data before submitting the application again. Click “**Previous**” to go back to a data entry section.

IMPORTANT: If the application status changed from “**Eligible**” to “**Denied**” you will no longer have to go back to the Step 5 and set the Energy Account to Pay to “**None**”. It will be done automatically.



- Utility account is a duplicate for this program year with ApplicationID 119095 entered on program HEAP 2016 for customer JULIE GARCIA
- Utility account is a duplicate for this program year with ApplicationID 119095 entered on program HEAP 2016 for customer JULIE GARCIA

Program:	2016	FAST TRACK 2016
Program Year*		Program*
Status:	DENIED	APPLICANT ALREADY RECEIVED A BENEFIT THIS CALENDAR YEAR.
	<small>If the application status is denied, then the energy account to pay must be set to none</small>	Denial Reason
Application Status*		
Payment:	\$0.00	\$0.00
Base Payment		Supp. Payment*
		Total Payment*
Priority Points:	0	
Intake:	MAIL	1/14/2016
Intake Location		Intake Date*
		Certification Date*
Monthly Energy Cost*:	\$266.67	
Energy Burden:	13.33 %	
Referral:		
Referral Agency		Staff Person

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.

The screenshot displays a web application interface for editing a customer's application. The top navigation bar includes buttons for Save, Save and Close, Add a Job, Exit, Delete, Refresh, Validate Addresses, Check Status in CORE, and Application Details. A left sidebar lists various sections: Program/Payment/Intake (selected), 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 main content area is titled "Edit Application" for "JULIE GARCIA, ApplicationID - 119101". It contains two sections:

- Program/Payment/Intake**: This section includes fields for Customer (JULIE GARCIA), Program (2016), Program Year (FAST TRACK 2016), Status (DENIED), Application Status (APPLICANT ALREADY RECEIVED A BENEFIT THIS CALENDAR YEAR), Payment (\$0.00), Base Payment (\$0.00), Supp. Payment (\$0.00), Total Payment (\$0.00), Priority Points (0), Intake (MAIL), Intake Location (1/14/2016), Intake Date (1/14/2016), Certification Date (1/14/2016), Language (ENGLISH), Monthly Energy Cost (\$266.67), and Energy Burden (13.33 %).
- Mailing Address**: This section includes fields for Line 1 (555 MAIN STREET), Care Of (STREET), Line 2 (APARTMENT 1), Building Type (Unit Number), Line 3 (95076 WATSONVILLE), Zip Code (SANTA CRUZ), City (CA), County (SANTA CRUZ), and State (CA). A checkbox indicates "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 software application window with a sidebar menu and a main content area. The sidebar, titled 'Sections', lists various application areas: 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, titled 'Additional Energy Accounts', shows a large blue box with a plus icon and the text 'No data to display'. Below this box, a status bar indicates 'Additional Energy Cost total: \$0.00'. An 'Edit Form' dialog box is open in the foreground, containing five input fields: 'Utility:', 'Account Number:', 'Vendor:', 'Monthly Cost:', and 'Total Amt Due:'. The dialog box also features a save icon and a close button.

Priority Points

When a contract is added to ServTraq, the *Priority Points* are set to the most recent **Priority Plan** entered in the system. If your **Priority Plan** changed from one year to another, the changes will not be reflected in the database. The updates will need to be made manually under each subprogram.

Subprograms

	Display Name	Allocation	Program Year	Active
 	ECCS 2016	\$0.00	2016	<input checked="" type="checkbox"/>
 	ECHS 2016	\$0.00	2016	<input checked="" type="checkbox"/>
 	FAST TRACK 2016	\$0.00	2016	<input checked="" type="checkbox"/>
 	HEAP 2016	\$0.00	2016	<input checked="" type="checkbox"/>
 	SWEATS 2016	\$0.00	2016	<input checked="" type="checkbox"/>
 	WPO ECIP 2016	\$0.00	2016	<input checked="" type="checkbox"/>
 	WPO HEAP 2016	\$0.00	2016	<input checked="" type="checkbox"/>

Unresolved Issues

■ CSD 3.9 UA Data Transfer Rules PY16

- *What you need to know...*

- The CSD 3.9 UA DTR (draft) was released January 15, 2016 for comment
- Changes cannot be implemented in ServTraq until the document is finalized and we understand the data collection and reporting requirements

Finalized UA Data Transfer Rules should have been received on or before **January 1, 2016** for a **March 1, 2016** CSD implementation deadline

By contract the vendor has 60 days to implement **minor** changes to the system. PY16 is a **major** change.

Will CSD still hold a **March 1, 2016** implementation deadline?

Unresolved Issues

■ CSD UA Data Transfer Rules PY16

– *What you need to know...*

- As we understand it, the new Data Transfer Rules may be enforced in CORE as of **March 1, 2016**
 - Records ***entered*** in the local system before March 1st, ***transferred*** on or after March 1st, may be affected. This could potentially result in an increased number of ***Rejected Records*** due to insufficient time to implement all new requirements.
 - CCES has suggested CSD to host forums to explain the data collection and reporting expectations. Please contact CSD for clarification.

The rules received have been posted at our Support Portal. You can download a copy of the rules received at:

<https://servtraq.freshdesk.com/support/discussions/topics/4000326146>

Unresolved Issues

- *What you need to know...*
- *Required Electric Account information*
- *CSD Form 43 makes collection of Electric Account information a requirement*
- *The CSD 3.9 UA Data Transfer Rules PY16 (Draft) now make it optional*

IMPORTANT: We will be changed in ServTraq
from requirement to optional.



Questions

Contact us at Support@ServTraq.com