

## Job Status Tracking & Reports

### Background:

Job Statuses can be used to track the progress of Weatherization Jobs at every stage. The Job Status options in the drop down list can be changed to tailor your agency's needs and preferences via the Administration page.

### Procedure:

Jobs can be assigned a new status via the *Open Jobs List* page, *Appointment Schedule* page, and via the *Job Details* page.

- 1) To assign a "status" to a Job via the *Open Jobs List*, simply **click** on the job's **current status link**.
- 2) A second page will open where you can assign a date, status, notes or crew leader. (Only a date and status are required to save an entry.)
- 3) Click the Floppy Disk to Save.

The screenshot displays the SERVTRAQ web application interface. On the left is a navigation menu with options like Home, Contacts, HEAP, Weatherization, Dwelling/Job Search, Scheduling, Open Jobs List, Appointment Schedule, and Crew Time Entry. The 'Open Jobs List' page shows a table with columns: Job Type, Current Status, Job ID, TRP Geographically Eligible, and LIWP Census Tract Eligible. Three rows are visible, all with 'INITIAL WEATHERIZATION' job type and 'NO STATUS' current status. The first row (Job ID 23969) has a red box around the 'NO STATUS' link. Below this, the 'Job Status History' page is shown for Job ID 23969. It features a table with columns: Add/Edit/Delete, Job Status Date, Status, Est. Time, Crew Leader, Notes, Entry Date, Entered By, Last Updated Date, and Last Updated By. The 'Job Status Date' is set to 8/1/2018, and the 'Status' dropdown is set to 'READY TO ASSESS'. A red box highlights the 'Job Status Date' and 'Status' fields. At the bottom right of the 'Job Status History' page, there are icons for saving (floppy disk) and closing (X).

### Job Details Page

If can also update the Job's status via the Job Details page:

- 1) **Click** on the **Status History** link located under the Related Section Menu.

- 2) A second page will open where you can assign a date, status, notes or crew leader. (Only a date and status are required to save an entry.)
- 3) Click the Floppy Disk to Save.

**Sections**

- Assessment Items
- Job Details
- Measures
- Validation Summary
- Rejections
- ECIP Justification
- Notes

**Related**

- Appointments
- Status History**
- Files
- Image Gallery
- Audit/Change History

**Edit Job**  
**JobID - 23969, 508 W DONOVAN RD, SANTA MARIA, 93458**

**Eligibility Details**  
 Customer: JESUS LAUREL  
 Eligibility: View/Edit Eligibility Record

**Dwelling Assessment Items**

**Job Status History**

Refresh List | Export List | Exit

Status history for JobID - 23969, Address - 508 W DONOVAN RD , SANTA MARIA, 93458

Add/Edit/Delete	Job Status	Status	Est. Time	Crew Lead	Notes	Entry Date	Entered By	Last Update	Last Update
Job Status Date:	8/1/2018	Status: ASSESSED	Est. Time:	Crew Leader:	Job Status Note:				

Save (Floppy Disk Icon) | Cancel (X Icon)

## Editing/Setting up Job Status

ServTraq has a default list of job statuses, however you can edit these to create a workflow better suited to the flow of your agencies own internal processes.

To edit these, simply locate the Administration>Data Administration>Dwelling/Job Status Administration page.

You can add, edit, or delete current Statuses available.

Home

Contacts

HEAP

Weatherization

Inventory

Reports

Analytics

Administration

Global User Management

Agency User Management

Agency Details

Data Administration

Lookup Table Data Administration - Dwelling/Job Statuses

Select a data type: Dwelling/Job Status Administration

	Status Display	Status Explanation	Job Stage	Sho
<div><div></div><div></div><div></div></div> APPOINTMENT KEPT	CREW HAS KEPT APPOINTMENT - CHECK INS CAN BE DONE FROM MOBILE APP	05	Yes	
<div><div></div><div></div><div></div></div> ASSESS IN PLACE JOB	WDR PROGRAM ASSESS AND DO JOB AT SAME TIME	05	Yes	
<div><div></div><div></div><div></div></div> ASSESSED	COMPLETE ASSESSMENT HAS BEEN DONE	02	Yes	
<div><div></div><div></div><div></div></div> CALLBACK APPROVED	ES MANAGER OR ASST PROGRAM DIRECTOR HAS APPROVED CALLBACK	09	No	
	AFTER A JOB HAS BEEN COMPLETED, WE ARE			

## Update a Job Status

You can also sort your open jobs by job status to see how many jobs you have in particular stages and therefore redirect focus to those jobs that may need it most.

Go to the Open Jobs List and drag and drop the **current status column** to the “Grouping Section”

**SERVTRAQ** Local Solutions for California

Home | Contacts | HEAP | Weatherization

Weatherization Admin

- Job Reporting
- Unreport Jobs

**Open Jobs List**

Refresh List | Export List | Color Key

Drag a column header here to group by that column

LIWP Census Tract Eligible	TRP Geographically Eligible	Job ID	Current Status
!	!	47540	NO STATUS
!	✓	47585	NO STATUS
!	!	46797	NO STATUS
!	!	46572	NO STATUS
!	✓	47560	NO STATUS
!	✓	47428	NO STATUS
!	✓	43745	NO STATUS
!	!	46979	NO STATUS

Your Open Weatherization Jobs will be grouped by Job Statuses. Click on the side carrot to view the details.

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Home | Contacts | HEAP | Weatherization

Weatherization Admin

- Job Reporting
- Unreport Jobs
- Performance Measure Checklist
- Contract Expense Entry
- Ineligible Address List

**Open Jobs List**

Refresh List | Export List | Color Key

Current Status

LIWP Census Tract Eligible	TRP Geographically Eligible	Job ID	ACC	Job Type
Current Status: APPOINTMENT KEPT				
Current Status: ASSESSED				
!	!	47628		INITIAL WEATHERIZATION
!	✓	47518		INITIAL WEATHERIZATION
✓	✓	47554		INITIAL WEATHERIZATION
!	✓	47527		INITIAL WEATHERIZATION
!	!	47013	289305	INITIAL WEATHERIZATION
✓	✓	47591		INITIAL WEATHERIZATION
!	!	47568		INITIAL WEATHERIZATION
!	!	47604		INITIAL WEATHERIZATION

Current Status: CALLBACK REQUESTED

Current Status: CALLBACK SCHEDULED

Current Status: CANCELLATION BY CUSTOMER