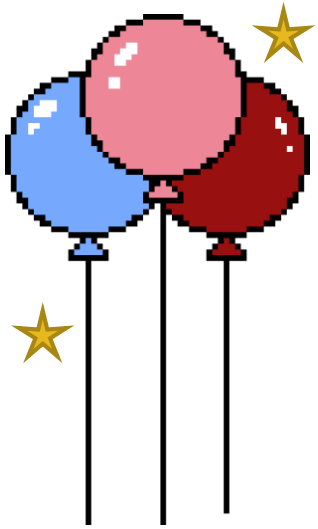


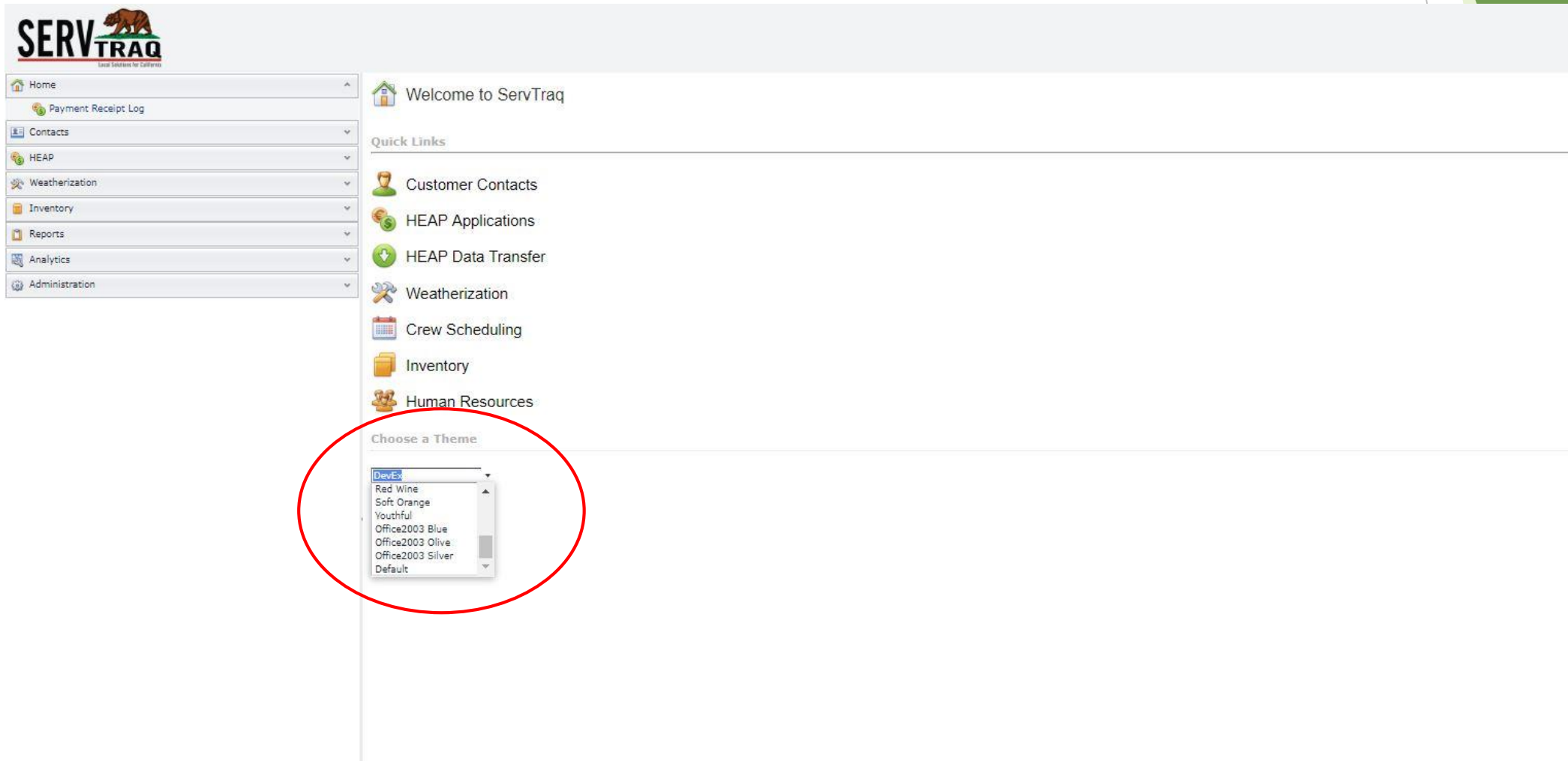


Utility Assistance Scheduler

You Can Now Schedule Appointments for Utility Assistance




You can **change** the **color** of **ServTraq** by selecting one of the **available themes** below



The screenshot displays the SERVTRAQ web application interface. On the left is a navigation sidebar with the SERVTRAQ logo and a list of menu items: Home, Payment Receipt Log, Contacts, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. The main content area on the right features a 'Welcome to ServTraq' message, a 'Quick Links' section with icons for Customer Contacts, HEAP Applications, HEAP Data Transfer, Weatherization, Crew Scheduling, Inventory, and Human Resources, and a 'Choose a Theme' section. The 'Choose a Theme' section contains a dropdown menu that is open, showing a list of themes: DevEx, Red Wine, Soft Orange, Youthful, Office2003 Blue, Office2003 Olive, Office2003 Silver, and Default. This dropdown menu is circled in red.

NEW to the Heap Section of ServTraq

SERV  **TRAQ**
Local Solutions for California

Welcome 60000ADHoyos ! [Log Out] [Change Pa]

Home
Contacts
HEAP

Customer/Application Search
Online Application Processing
Pending/Incomplete Applications
Application Data Transfer
Rejected Records
Rejected Record Search and Entry
Rejected Record Clearance
Credit Return Payment Update
CARE RRP Application Entry
Intake Appointment Schedule

Weatherization
Inventory
Reports
Analytics
Administration

Intake Appointment Schedule

Refresh List Export to Print Schedule

List Name	SSN	Mailing Address	City	Zip Code	County	Phone	Mobile Phone	Message Phone	Other Phone
831 CUSTOMER						(831) 840-2642			
831 CUSTOMER		940				(831) 809-1832			
A C GRADING INC		190 RAINBOW LN	WATSONVILLE	95076	SANTA CRUZ	(831) 763-2538			
A C GRADING, INC		190 RAINBOW LN	WATSONVILLE	95076					
A CUSTOMER		278 P.O BOX	NEW ALMADEN	95042		(408) 997-7293			
A FRUGE	666-66-8419	PO BOX 1999	CARMEL VALLEY	93924	MONTEREY	(831) 659-1577			
A HARDING		3543 ALDEN WAY APT 6	SAN JOSE	95117					
A MARION LARSEN		1635 TREMONT DR APT 115	SANTA CRUZ	95062	SANTA CRUZ	(831) 479-8739			
A MEECHIE PIERCE		443 WATSON ST APT A	MONTEREY	93940	MONTEREY	(831) 594-5736	(831) 394-6449	(831) 643-9378	
A RENZI		151 GROVE ST	SALINAS	93901	MONTEREY	(831) 424-5348			
AARON AMESCUA		485 HOLOHAN RD APT 232	WATSONVILLE	95076	SANTA CRUZ	(831) 707-6308			
AARON AMEZCUA		485 HOLOHAN RD APT 232	WATSONVILLE	95076	SANTA CRUZ	(831) 768-9639	(831) 707-6308		
AARON ARELA		7001 ROSSANNA ST	GILROY	95020		(408) 310-7573			
AARON BOONE		427 BRIDGE ST APT 9	WATSONVILLE	95076	SANTA CRUZ	(831) 728-0780			

Page 1 of 3430 (68593 items) 1 2 3 4 5 6 7 ... 3428 3429 3430

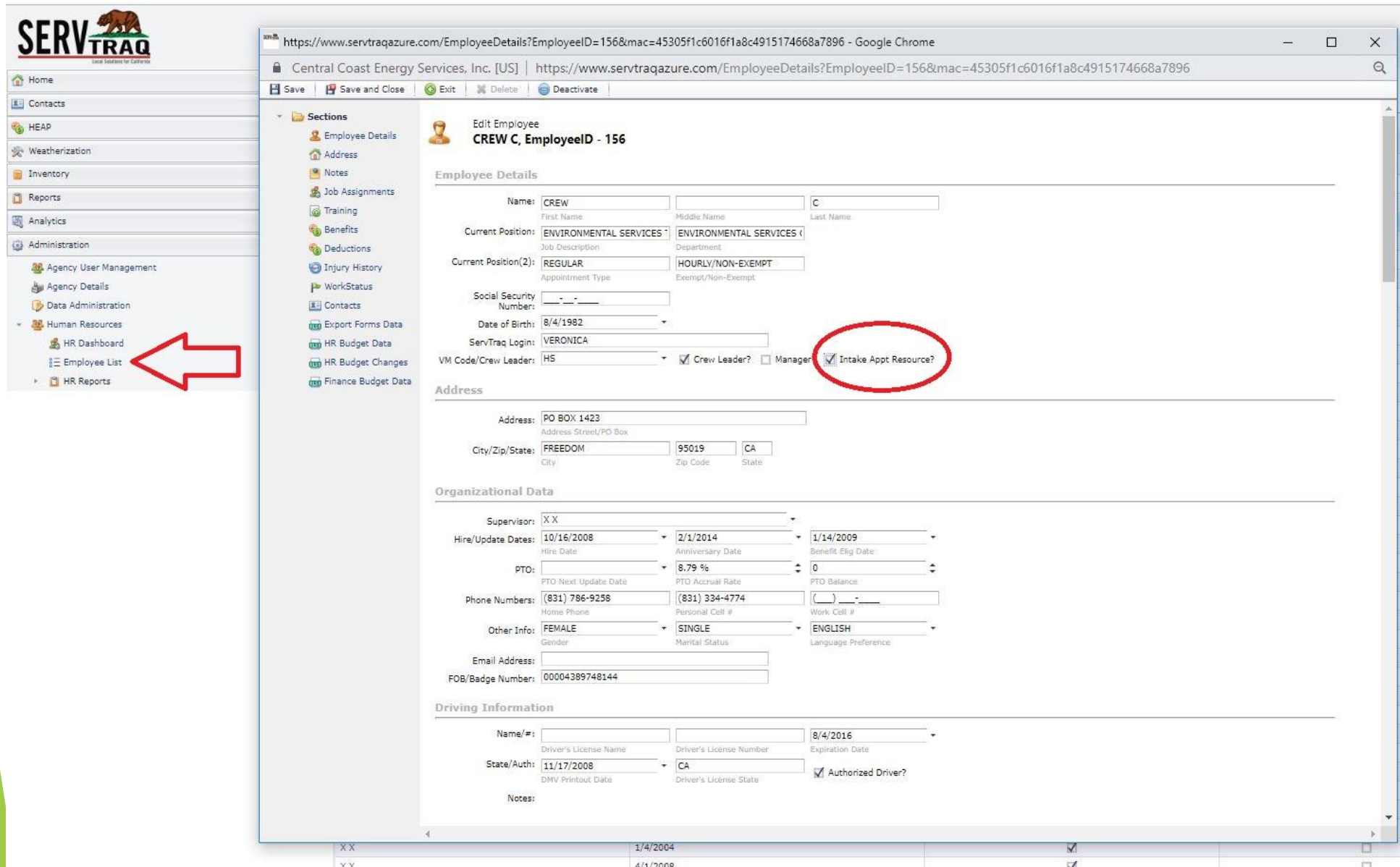
Today January 22, 2019 Day Work Week Mo


CREW AWESOME, CREW B

	CREW AWESOME Tuesday, January 22	CREW B Tuesday, January 22
7:00		
8:00		
9:00		
10:00		
11:00		
12:00		
1:00		
2:00		
3:00		

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To Use **Employees** with the **Scheduler**, Checkmark the box for “**Intake Appt Resource**”
(locations can be created as employees)



SERV**TRAQ**
Local Solutions for California

Home
Contacts
HEAP
Weatherization
Inventory
Reports
Analytics
Administration
Agency User Management
Agency Details
Data Administration
Human Resources
HR Dashboard
Employee List
HR Reports

Sections
Employee Details
Address
Notes
Job Assignments
Training
Benefits
Deductions
Injury History
WorkStatus
Contacts
Export Forms Data
HR Budget Data
HR Budget Changes
Finance Budget Data

https://www.servtraqazure.com/EmployeeDetails?EmployeeID=156&mac=45305f1c6016f1a8c4915174668a7896 - Google Chrome
Central Coast Energy Services, Inc. [US] | https://www.servtraqazure.com/EmployeeDetails?EmployeeID=156&mac=45305f1c6016f1a8c4915174668a7896

Save Save and Close Exit Delete Deactivate

Edit Employee
CREW C, EmployeeID - 156

Employee Details

Name:
First Name Middle Name Last Name

Current Position:
Job Description Department

Current Position(2):
Appointment Type Exempt/Non-Exempt

Social Security Number:
Date of Birth:
ServTraq Login:
VM Code/Crew Leader: ☒ Crew Leader? ☐ Manager ☒ Intake Appt Resource?

Address

Address:
Address Street/PO Box

City/Zip/State:
City Zip Code State

Organizational Data

Supervisor:
Hire/Update Dates:
Hire Date Anniversary Date Benefit Elig Date

PTO:
PTO Next Update Date PTO Accrual Rate PTO Balance

Phone Numbers:
Home Phone Personal Cell # Work Cell #

Other Info:
Gender Marital Status Language Preference

Email Address:
FOB/Badge Number:

Driving Information

Name/#:
Driver's License Name Driver's License Number Expiration Date

State/Auth: ☒ Authorized Driver?
DMV Printout Date Driver's License State

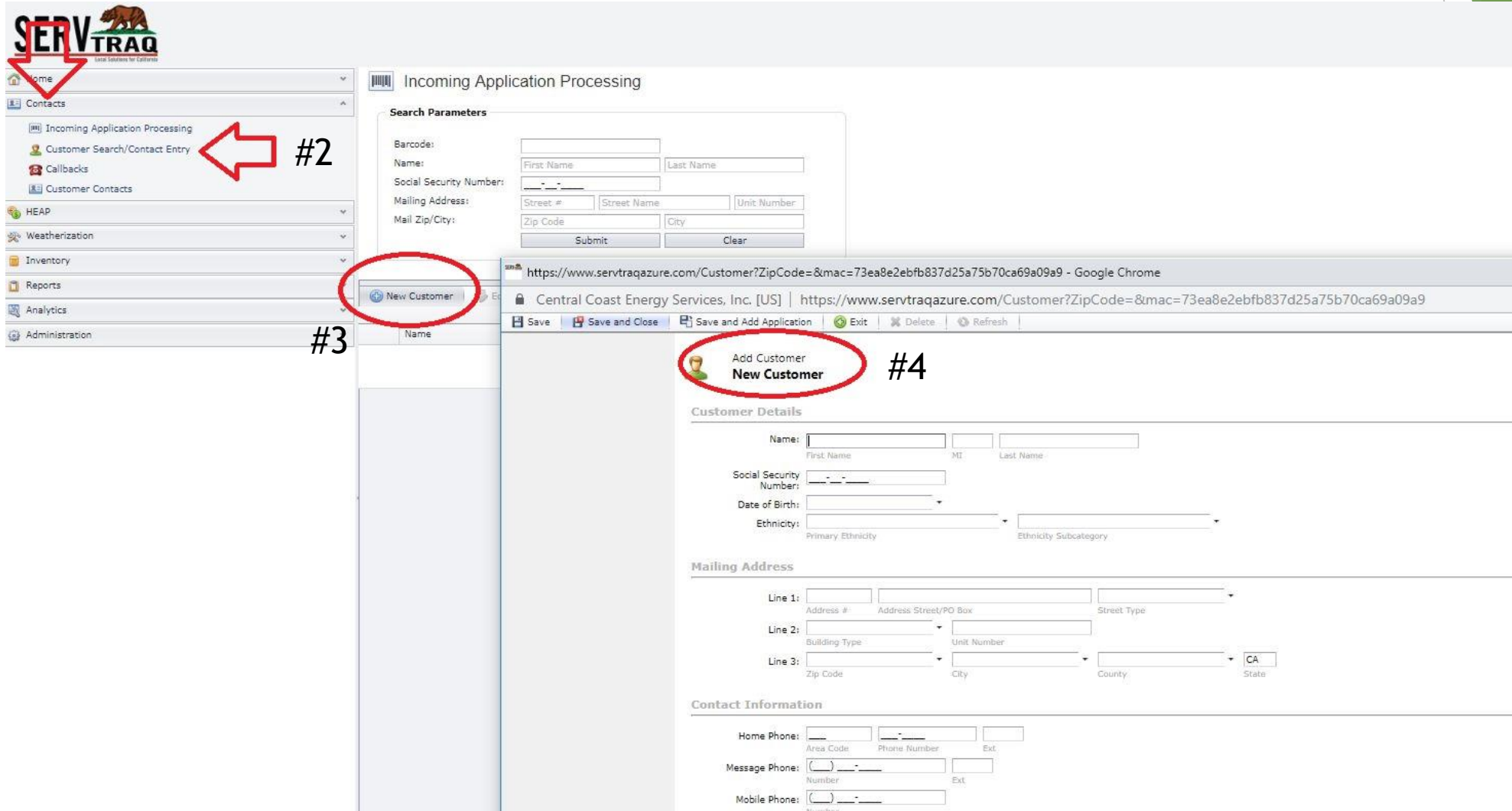
Notes:




The screenshot displays a web application interface. On the left, a sidebar contains a calendar icon and the text 'Intake Appointment Schedule'. Below this is a table with columns 'List Name' and 'SS'. The table lists several customers, with 'A HARDING' highlighted in blue and circled in red. Below the table, there is a pagination bar showing 'Page 1 of 3430 (68597 items)' and a date selector for 'January 24, 2019'. The main content area on the right shows the 'Edit Customer' form for 'HARDING, A'. The form includes sections for 'Customer Details', 'Mailing Address', 'Contact Information', and 'Contacts'. The 'Customer Details' section has fields for Name (First Name, MI, Last Name), Social Security Number, Date of Birth, and Ethnicity. The 'Mailing Address' section has fields for Line 1, Line 2, and Line 3, each with sub-fields for Address #, Address Street/PO Box, Street Type, Building Type, Unit Number, Zip Code, City, County, and State. The 'Contact Information' section has fields for Home Phone, Message Phone, Mobile Phone, and Other Phone, each with sub-fields for Area Code, Phone Number, and Ext. The 'Contacts' section is currently empty, showing a message 'No contacts exist for this customer'.

If the customer has **not** yet been **saved** in **ServTraq**, you must **enter** them

#1



SERV  **TRAQ**
Local Solutions for California

Home
Contacts
Incoming Application Processing
Customer Search/Contact Entry
Callbacks
Customer Contacts
HEAP
Weatherization
Inventory
Reports
Analytics
Administration

Incoming Application Processing

Search Parameters

Barcode:
Name: First Name Last Name
Social Security Number:
Mailing Address: Street # Street Name Unit Number
Mail Zip/City: Zip Code City
Submit Clear

New Customer

https://www.servtraqazure.com/Customer?ZipCode=&mac=73ea8e2ebfb837d25a75b70ca69a09a9 - Google Chrome
Central Coast Energy Services, Inc. [US] | https://www.servtraqazure.com/Customer?ZipCode=&mac=73ea8e2ebfb837d25a75b70ca69a09a9
Save Save and Close Save and Add Application Exit Delete Refresh

Add Customer New Customer

Customer Details

Name: First Name MI Last Name
Social Security Number:
Date of Birth:
Ethnicity: Primary Ethnicity Ethnicity Subcategory

Mailing Address

Line 1: Address # Address Street/PO Box Street Type
Line 2: Building Type Unit Number
Line 3: Zip Code City County CA State

Contact Information

Home Phone: Area Code Phone Number Ext.
Message Phone: Number Ext.
Mobile Phone: Number

Use the fields at the top of each column to search for your customers

Welcome 60407ADHoyos! [Log Out] [Change Pa]

Intake Appointment Schedule

Refresh List Export to Print Schedule Print Schedule - New Enter Se

List Name	SSN	Mailing Address	City	Zip Code	County	Phone	Mobile Phone	Message Phone	Other Phone
JOSEPH JOSEPH			SALINAS	93906	MONTEREY				
CLARENCE JOSEPH			SAN FRANCISCO	94109	SAN FRANCISCO	(415) 894-7320			
CONCHING JOSE			SAN FRANCISCO	94110	SAN FRANCISCO				
CUSTOMER JOSEPH			SALINAS	93906	MONTEREY				
CUSTOMER JOSEPH									
DEBBIE JOSEPH			SALINAS	93901	MONTEREY				
DEBRA JOSEPH			SALINAS	93905	MONTEREY				
DIANE JOSEPH			MILLBRAE	94030	SAN MATEO				
GIOVANNI JOSE CAMARENA			SANTA CRUZ	95065	SANTA CRUZ				
GLADYS JOSEPH			SAN FRANCISCO	94124	SAN FRANCISCO				
GRACIA JOSELINA TONGSON			COLMA	94014	SAN MATEO				
JAMES JOSEPH									
JOANNE JOSE TICZON			PACIFICA	94044	SAN MATEO				
JOANNE JOSELYN			PACIFIC GROVE	93950	MONTEREY				

Page 1 of 133 (2642 items) 1 2 3 4 5 6 7 ... 131 132 133


January 29, 2019 Day Work Week Mo

Tuesday, January 29

7:00

8:00

Click on **calendar icon** to open **appointment entry**

SERV**TRAQ**
Local Solutions for California

Welcome 6000ADHoyos! [Log Out] [Change Pass]

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

Intake Appointment Schedule

Refresh List | Export to | Print Schedule | Print Schedule - New | Enter Search

List Name	SSN	Mailing Address	City	Zip Code	County	Phone	Mobile Phone	Message Phone	Other Phone
831 CUSTOMER						(83			
831 CUSTOMER		940				(83			
A C GRADING INC		190	WATSONVILLE	95076	SANTA CRUZ	(83			
A C GRADING, INC		190	WATSONVILLE	95076					
A CUSTOMER		278	NEW ALMADEN	95042		(40			
A FRUGE		PO	CARMEL VALLEY	93924	MONTEREY	(83			
A HARDING		354	SAN JOSE	95117					
A MARION LARSEN		163	15 SANTA CRUZ	95062	SANTA CRUZ	(83			
A MEECHIE PIERCE		443	MONTEREY	93940	MONTEREY	(83			
A RENZI		151	SALINAS	93901	MONTEREY	(83			
AARON AMESCUA		485	2 WATSONVILLE	95076	SANTA CRUZ	(83			
AARON AMEZCUA		485	2 WATSONVILLE	95076	SANTA CRUZ	(83			
AARON ARELA		700	GILROY	95020		(40			
AARON BOONE		427	WATSONVILLE	95076	SANTA CRUZ	(83			

Page 1 of 3430 (68598 items) | 1 2 3 4 5 6 7 ... 3428 3429 3430

January 29, 2019 | Day | Work Week | Mo

CREW AWESOME, CREW B

	CREW AWESOME Tuesday, January 29	CREW B Tuesday, January 29
7:00		
8:00		
9:00		
10:00		
11:00		
12:00 PM		
1:00		
2:00		
3:00		

Edit the **fields** in accordance with your planned **schedule**

Intake Appointment Schedule

Refresh List | Export to | Print Schedule

List Name	SSN	Mailing Address	City	Zip Code	County	Phone	Mobile Phone	Message Phone	Other P
831 CUSTOMER						(831) 840-2642			
831 CUSTOMER						(831) 809-1832			
A C GRADING INC						(831) 763-2538			
A C GRADING, INC									
A CUSTOMER						(408) 997-7293			
A FRUGE						(831) 659-1577			
A HARDING									
A MARION LARSEN						(831) 479-8739			
A MEECHIE RIERCE						(831) 594-5736	(831) 394-6449	(831) 643-9378	
A RENZI						(831) 424-5348			
AARON AMESCUA						(831) 707-6308			
AARON AMEZCUA						(831) 768-9639	(831) 707-6308		
AARON ARELA						(408) 310-7573			
AARON BOONE						(831) 728-0780			

Appointment for CustomerID - 103969, 831 CUSTOMER - (831) 840-2642

CustomerID#: 103969
Employee: CREW AWESOME
Appt. Type: 831 CUSTOMER - (831) 840-2642
Mlg Address: - -
Start time: 1/24/2019 9:00 AM End time: 1/24/2019 9:30 AM
Show time as: Busy ☐ All day event
Name: 831 CUSTOMER; Phone: (831) 840-2642;
☐ Recurrence
OK Cancel Delete

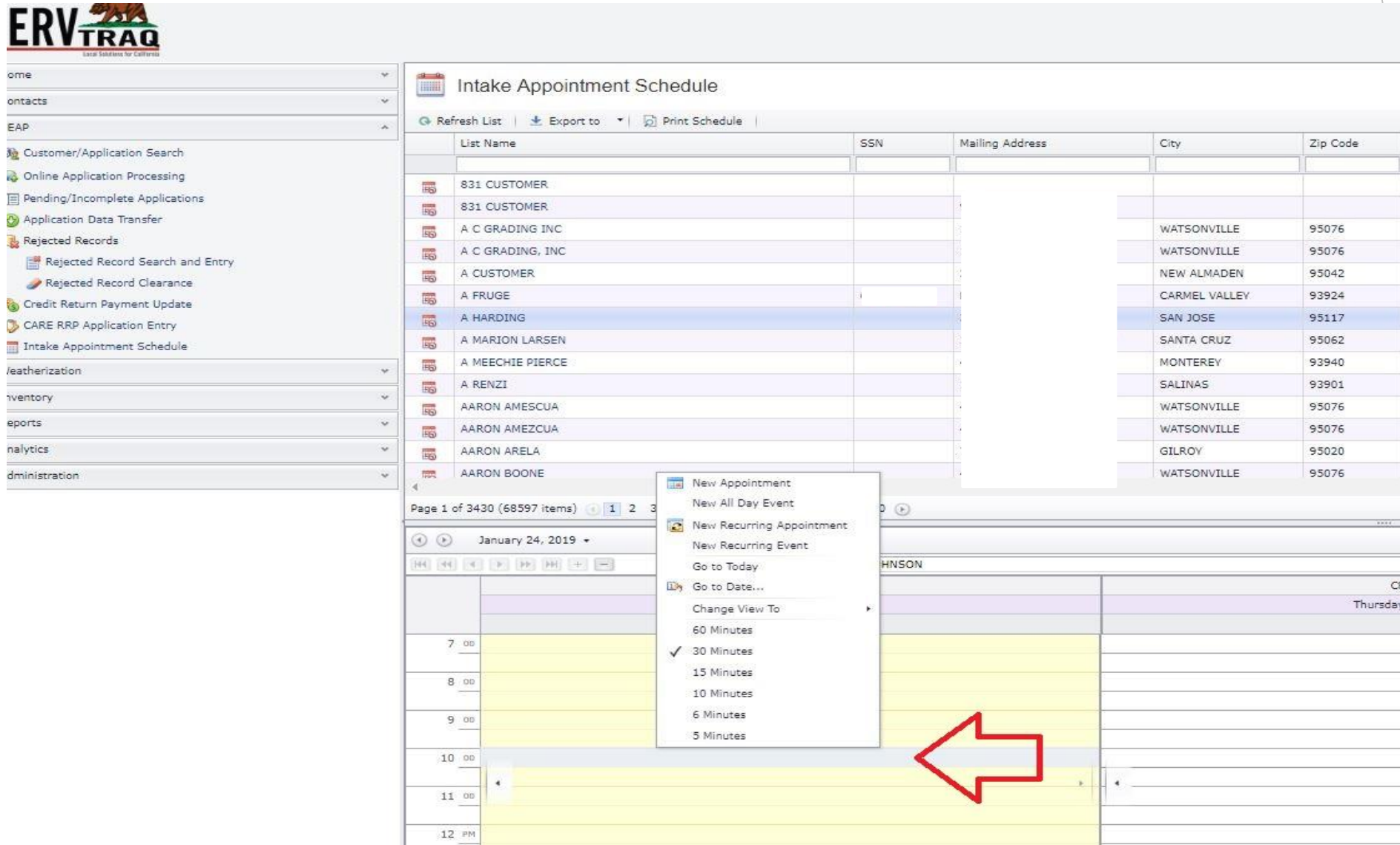
Page 1 of 3430 (68596 items)

January 24, 2019

CREW AWESOME, CREW B

	CREW AWESOME Thursday, January 24	CREW B Thursday, January 24
7:00		
8:00		
9:00		
10:00		
11:00		
12:00		
1:00		
2:00		

You can also click on an **open time** slot under an **employees** name



ERV TRAQ
Local Solutions for California

ome
ontacts
EAP
Customer/Application Search
Online Application Processing
Pending/Incomplete Applications
Application Data Transfer
Rejected Records
Rejected Record Search and Entry
Rejected Record Clearance
Credit Return Payment Update
CARE RRP Application Entry
Intake Appointment Schedule
featherization
Inventory
Reports
Analytics
Administration

Intake Appointment Schedule
Refresh List | Export to | Print Schedule

List Name	SSN	Mailing Address	City	Zip Code	C
831 CUSTOMER					
831 CUSTOMER					
A C GRADING INC			WATSONVILLE	95076	S
A C GRADING, INC			WATSONVILLE	95076	
A CUSTOMER			NEW ALMADEN	95042	
A FRUGE			CARMEL VALLEY	93924	M
A HARDING			SAN JOSE	95117	
A MARION LARSEN			SANTA CRUZ	95062	S
A MEECHIE PIERCE			MONTEREY	93940	M
A RENZI			SALINAS	93901	M
AARON AMESCUA			WATSONVILLE	95076	S
AARON AMEZCUA			WATSONVILLE	95076	S
AARON ARELA			GILROY	95020	
AARON BOONE			WATSONVILLE	95076	S

Page 1 of 3430 (68597 items) | 1 2 3

January 24, 2019

7:00
8:00
9:00
10:00
11:00
12:00 PM

Context Menu:
New Appointment
New All Day Event
New Recurring Appointment
New Recurring Event
Go to Today
Go to Date...
Change View To
60 Minutes
30 Minutes
15 Minutes
10 Minutes
6 Minutes
5 Minutes

Red Arrow points to the 10:00-11:00 AM slot.

You can **add or subtract** the number of “**employees**”. Alter the **view** of the calendar

Intake Appointment Schedule

Refresh List | Export to | Print Schedule | Enter Search Criteria...

List Name	SSN	Mailing Address	City	Zip Code	County	Phone	Mobile Phone	Message Phone	Other Phone
831 CUSTOMER						(831) 840-2642			
831 CUSTOMER									
A C GRADING INC			WATSONVILLE	95076	SANTA CRUZ				
A C GRADING, INC			WATSONVILLE	95076					
A CUSTOMER			NEW ALMADEN	95042					
A FRUGE			CARMEL VALLEY	93924	MONTEREY				
A HARDING			SAN JOSE	95117					
A MARION LARSEN			T 115 SANTA CRUZ	95062	SANTA CRUZ				
A MEECHIE PIERCE			MONTEREY	93940	MONTEREY		(831) 394-6449	(831) 643-9378	
A RENZI			SALINAS	93901	MONTEREY				
AARON AMESCUA			232 WATSONVILLE	95076	SANTA CRUZ				
AARON AMEZCUA			232 WATSONVILLE	95076	SANTA CRUZ		(831) 707-6308		
AARON ARELA			GILROY	95020					
AARON BOONE			WATSONVILLE	95076	SANTA CRUZ				

Page 1 of 3430 (68597 items) | 1 2 3 4 5 6 7 ... 3428 3429 3430 | Page size: 20

January 24, 2019

CREW AWESOME, CREW B, JOHN JOHNSON

	CREW AWESOME Thursday, January 24	CREW B Thursday, January 24	JOHN JOHNSON Thursday, January 24
7:00			
8:00			
9:00			
10:00			
11:00			
12:00 PM			
1:00			
2:00			
3:00			

Version 1.120.0.0

Scheduling an **appointment** for a customer, creates a **contact note** on their **customer record**

January 30, 2019 ▾

◀ ◁ ▷ ▶▶ ▶▶ + -

CREW AWESOME, CREW B

CREW AWESOME

Wednesday, January 30

7 00	
8 00	
9 00	A FRUGE - (831) 659-1577 (PO BOX 1959 - CARMEL VALLEY - 93924)
10 00	
11 00	
12 PM	

Click on the **customers name** to go to the **Edit Customer** page and view their **Customer Record**. A section has been added for **intake appointments**

Sections

Customer Details
Mailing Address
Contact Information
Contacts
Household
Notes
Applications
Jobs
Intake Appointments
Related
CSD Change Requests
Files

Edit Customer

FRUGE, A - CustomerID#: 38267

Customer Details

Name:

A

J

FRUGE

First NameMILast Name

Social Security Number:

666-66-8419

Date of Birth:

3/10/1980

Ethnicity:

Primary Ethnicity

Ethnicity Subcategory

Mailing Address

Line 1:

PO BOX 1959

Address #Address Street/PO BoxStreet Type

Line 2:

Building TypeUnit Number

Line 3:

93924

CARMEL VALLEY

MONTEREY

CA

Zip CodeCityCountyState

Applications

Program	Application Status	Intake Date	Transfer Date	Service Address	City
HEAP 2018	ELIGIBLE	1/15/2019		53 E CARMEL VALLEY 624	CARMEL VALLEY
HEAP 2012	TRANSFERRED	2/8/2012	4/20/2012	53 E CARMEL VALLEY 624	CARMEL VALLEY
HEAP 2011	TRANSFERRED	5/10/2011	6/10/2011	53 E CARMEL VALLEY 624	CARMEL VALLEY
HEAP 2009	TRANSFERRED	6/24/2010	6/25/2010	53 E CARMEL VALLEY 624	CARMEL VALLEY
HEAP 2008	TRANSFERRED	3/10/2008	4/23/2008	53 E CARMEL VALLEY 624	CARMEL VALLEY
LIHEAP 2007	TRANSFERRED	4/30/2007	5/4/2007	53 E CARMEL VALLEY 623	CARMEL VALLEY
LIHEAP 2006	TRANSFERRED	4/14/2006	4/24/2006	53 E CARMEL VALLEY 623	CARMEL VALLEY
HEAP 2003	TRANSFERRED	4/18/2003	4/23/2003	53 E CARMEL VALLEY 623	CARMEL VALLEY

Jobs

Dwelling ID	Job ID	Job Type	Status	Job Completed Date	Reported Date
No jobs exist for this customer					

Intake Appointments

Appointment Date	Start Time	End Time	Appointment Type	Contact Info
1/30/2019	9:00 AM	9:30 AM	A FRUGE - (831) 659-1577	Name: A FRUGE; Phone: (831) 659-1577;
1/10/2019	9:00 AM	9:30 AM	INTAKE APPOINTMENT - A FRUGE	Name: A FRUGE; Phone: (831) 659-1577;

There are 2 types of **schedules** you can print

Intake Appointment Schedule

Refresh List Export to **Print Schedule**

Central Coast Energy Services, Inc. [US] | <https://www.servtraqazure.com/ReportViewerPopup?ReportName=UASchedule>

Report Parameters
Schedule Date: 1/29/2019 Submit

Page 1 of 2 PDF

UA Intake Schedule

EMPLOYEE: CREW AWESOME		APPOINTMENT DATE: 1/29/2019	
Start Time	End Time	Customer	Address
9:00 AM	9:30 AM	Name: A HARDING; Phone: No phone number on file;	3543 ALDEN WAY APT 6 - SAN JOSE - 95117
11:00 AM	11:30 AM	Name: A MEECHIE PIERCE; Phone: (831) 594-6736; Mobile Phone: (831) 394-6449; Message Phone: (831) 643-9378;	443 WATSON ST APT A - MONTEREY - 93940
3:00 PM	3:30 PM	Name: A MEECHIE PIERCE; Phone: (831) 594-6736; Mobile Phone: (831) 394-6449; Message Phone: (831) 643-9378;	443 WATSON ST APT A - MONTEREY - 93940

Page 1 of 3430 (68598 items) 1 2 3 4 5 6 7 ... 3

January 29, 2019

CREW AWESOME

8:00

9:00 A HARDING - (3543 ALDEN WAY APT 6 - SAN JOSE - 95117)

10:00

11:00 A MEECHIE PIERCE - (831) 594-6736 (443 WATSON ST APT A - MONTEREY - 93940)

12:00 PM

1:00

2:00

Print out the schedule for an employee or location

Central Coast Energy Services, Inc. [US] | https://www.servtraqazure.com/UAIntakeAppointmentSchedule

Welcome 60000ADHoyos | [Log Out] | [Change Password]

Intake Appointment Schedule

Refresh List | Export to | Print Schedule | **Print Schedule - New**

List Name	SSN	Mailing Address	City	Zip Code	County	Phone	Mobile Phone	Message Phone	Other Phone
831 CUSTOMER						(831) 840-2642			
831 CUSTOMER		940				(831) 809-1832			
A C GRADING INC		190 RAINBOW LN	WATSONVILLE	95076	SANTA CRUZ	(831) 763-2538			
A C GRADING, INC		190 RAINBOW LN	WATSONVILLE	95076					
A CUSTOMER		278 R.O BOX	NEW ALMADEN	95042		(408) 997-7293			
A FRUGE	666-66-8419	PO BOX 1959	CARMEL VALLEY	93924	MONTEREY	(831) 659-1577			
A HARDING		3543 ALDEN WAY APT 6	SAN JOSE	95117					
A MARION LARSEN		1635 TREMONT DR APT 115	SANTA CRUZ	95062	SANTA CRUZ	(831) 479-8739			
A MEECHIE PIERCE		443 WATSON ST APT A	MONTEREY	93940	MONTEREY	(831) 594-5736	(831) 394-6449	(831) 643-9378	
A RENZI		151 GROVE ST	SALINAS	93901	MONTEREY	(831) 424-5348			
AARON AMESCUA		485 HOLOHAN RD APT 232	WATSONVILLE	95076	SANTA CRUZ	(831) 707-6308			
AARON AMEZCUA		485 HOLOHAN RD APT 232	WATSONVILLE	95076	SANTA CRUZ	(831) 768-9639	(831) 707-6308		
AARON ARELA		7001 ROSSANNA ST	GILROY	95020		(408) 310-7573			
AARON BOONE		427 BRIDGE ST APT 9	WATSONVILLE	95076	SANTA CRUZ	(831) 728-0780			


Page 1 of 3430 (68598 items) | 1 2 3 4 5 6 7 ... 3428 3429 3430

January 29, 2019 | Day Work Week Month

CREW AWESOME, CREW B

	CREW AWESOME Tuesday, January 29	CREW B Tuesday, January 29
8:00		
9:00	A HARDING - (3543 ALDEN WAY APT 6 - SAN JOSE - 95117)	
10:00		
11:00	A MEECHIE PIERCE - (831) 594-5736 (443 WATSON ST APT A - MONTEREY - 93940)	
12:00		
1:00		
2:00		
3:00	A MEECHIE PIERCE - (831) 594-5736 (443 WATSON ST APT A - MONTEREY - 93940)	

Central Coast Energy Services, Inc. [US] | <https://www.servtraqazure.com/UAIntakeAppointmentSchedule>



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

Intake Appointment Schedule

Refresh List | Export to | Print Schedule | Print Schedule - New

List Name	SSN	Mobile Phone
831 CUSTOMER		
831 CUSTOMER		
A C GRADING INC		
A C GRADING, INC		
A CUSTOMER		
A FRUGE	666-66	
A HARDING		
A MARION LARGEN		
A MEECHIE PIERCE		
A RENZI		
AARON AMESCUA		
AARON AMEZCUA		
AARON ARELA		
AARON BOONE		

Page 1 of 3430 (68598 items) | 1 2 3 4 5 6 7 ... 3428 3429 3430

January 29, 2019

CREW AWESOME, CREW B

29 January 2019
Tuesday

CREW AWESOME
Tuesday, January 29

8 AM	
9 AM	A HARDING - (3543 ALDEN WAY APT 6 - SAN JOSE - 95117)
10 AM	
11 AM	A MEECHIE PIERCE - (831) 594-5736 (443 WATSON ST APT A - MONTEREY - 93940)
12 PM	
1 PM	
2 PM	
3 PM	A MEECHIE PIERCE - (831) 594-5736 (443 WATSON ST APT A - MONTEREY - 93940)
4 PM	
5 PM	
6 PM	
7 PM	
8 PM	
9 PM	
10 PM	
11 PM	
12 AM	
1 AM	
2 AM	
3 AM	
4 AM	
5 AM	
6 AM	
7 AM	

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LIVE DEMO

WX Scheduling Review

[illegible]

You must have some **employees** marked as “**Crew Leader**”

Central Coast Energy Services, Inc. [US] | <https://www.servtraqazure.com/EmployeeDetails?EmployeeID=69&mac=f5fd04563a324e27208f9e78058cf12b> - Google Chrome

Central Coast Energy Services, Inc. [US] | <https://www.servtraqazure.com/EmployeeDetails?EmployeeID=69&mac=f5fd04563a324e27208f9e78058cf12b>

Save Save and Close Exit Delete Deactivate

SERVTRAQ Local Solutions for California

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Data Administration
Human Resources
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HR Reports

Current View
Drag a column
Employee
CREW AWESOME
CREW B
CREW C
ADAM DEHO
JULIE GARCIA
JJ INC
SUBCONTRACTOR
SUBCONTRACTOR
JOHN JOHNSON
JOHN LEGG
BOB LOBLA
DIEGO T LOPEZ
TOTES MCGOWAN
CREW MEMBER
GLADYS MENDOZA
SAUL MORAN
JOHN C NASH
BRAD PITT
SALLY'S PLUMBER
RON ROSS
JAMES SMITH
AIRTEC SUPERVISOR
MARIA TESORO
TOM TOMMASE
YESENIA VALENZUELA
GERARDO L. VALENZUELA
X M X
X K X
X X
X X
X E X

Sections
Employee Details
Address
Notes
Job Assignments
Training
Benefits
Deductions
Injury History
Work Status
Contacts
Export Forms Data
HR Budget Data
HR Budget Changes
Finance Budget Data

Edit Employee
CREW AWESOME, EmployeeID - 69

Employee Details

Name:
First Name: Middle Name: Last Name:
Current Position:
Job Description: Department:
Current Position(2):
Appointment Type: Exempt/Non-Exempt:
Social Security Number: --
Date of Birth:
ServTraQ Login:
VM Code/Crew Leader: ☒ Crew Leader? ☐ Manager? ☒ Intake Appt Resource?

Address

Address:
Address Street/PO Box:
City/Zip/State:
City: Zip Code: State:


Organizational Data

Supervisor:
Hire/Update Dates:
Hire Date: Anniversary Date: Benefit Elig Date:
PTO:
PTO Next Update Date: PTO Accrual Rate: PTO Balance:
Phone Numbers:
Home Phone: Personal Cell #: Work Cell #:
Other Info:
Gender: Marital Status: Language Preference:
Email Address:
FOB/Badge Number:

Driving Information

Name/ #:
Driver's License Name: Driver's License Number: Expiration Date:
State/Auth: ☒ Authorized Driver?
DMV Printout Date: Driver's License State:
Notes:




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 - UA Marketing from Weatherization Jobs Completed
 - Weatherization Admin
 - Job Reporting
 - Unreport Jobs
 - Performance Measure Checklist
 - Contract Expense Entry
 - Ineligible Address List
 - CSD WXDB Reporting
 - CSD WXDB Rejected Records
 - CSD WXDB Data Transfer History
 - CSD WXDB EARS Reconciliation Activity
 - CSD WXDB Prior Period Adjustments
 - LIEE Refrigerator Program
 - LIEE Refrigerator List
 - PG&E Refrigerator Work Orders
 - PG&E Refrigerator Invoice
 - PG&E Refrigerator Customer List
 - PG&E Refrigerator Recycling Receipts
 - LIWP Program
 - LIHEAP Measures w/LIWP Equivalent Installed in a DAC
 - LIWP CIR Calculator
 - LIWP Eligible Weatherized Dwellings
 - LIWP Census Tract Map
 - Toilet Retrofit Program
 - TRP Eligible Weatherized Dwellings
 - Vehicle Management
 - Vehicle List
 - Gas Invoices
 - Inventory
 - Reports

Appointment Schedule

View Job Refresh List Export to Print Schedule Print Schedule - New Map View Color Key

	LIWP Census Tract Eligible	TRP Geographically Eligible	Job ID	ACC	Job Type	Current Status	Crew Leader	WSAG Signed Date	Est. Hours	List Name	Phone	Service Address
			48591		INITIAL WEATHERIZATION	NO STATUS		9/17/2015				583 GAMAY PL
			46797		PRIVATE CONTRACTING	NO STATUS		11/27/2017		ECKHAUS, ENRIQUE	(831) 794-2461	PO BOX 783
			46572		PRIVATE CONTRACTING	NO STATUS		12/8/2017		DANKERT, PAUL	(408) 739-1403	210 KELLER DR
			48580		LIEE REFRIGERATOR REPLACE	NO STATUS		12/12/2018		FERRILL, LA CENE	(831) 252-8220	2395 DELAWARE AVE SPC 121
			47407		INITIAL WEATHERIZATION	NO STATUS		5/10/2018		THOMPSON, RACHEL	(831) 706-6656	505 SMITH VALLEY RD
			47265		INITIAL WEATHERIZATION	NO STATUS		4/15/2018		ALONZO, GARY	(831) 770-9043	717 MIDDLE FIELD RD
			47688		INITIAL WEATHERIZATION	NO STATUS		7/28/2018		SHNEYDER, IOSIF	(650) 756-3266	24 GARDEN GROVE DR
			48579		LIEE REFRIGERATOR REPLACE	NO STATUS		10/1/2018		CARCAMO, TARA	(831) 707-0730	312 EAST LAKE AVE APT F
			47350		REWEATHERIZATION	NO STATUS		4/26/2018		CUEVAS, ESPIRIDION	(831) 596-8116	318 PINGREE WAY
			47455		INITIAL WEATHERIZATION	NO STATUS		5/4/2018		GOMEZ, ROGELIO	(831) 229-2944	1135 OSO CT
			47452		INITIAL WEATHERIZATION	NO STATUS		5/20/2018		ESQUIVEL, DANIEL	(831) 737-2592	1236 SAN ANTONIO DR
			47462		INITIAL WEATHERIZATION	NO STATUS		5/25/2018		CASTANEDA, MONIQUE	(831) 682-3097	1947 ALISAL RD

Page 1 of 17 (821 items)

Jan 28 - Feb 1, 2019

	Monday, Jan 28	Tuesday, Jan 29	Wednesday, Jan 30	Thursday, Jan 31	Friday, Feb 1	Monday, Jan 28	Tuesday, Jan 29	Wednesday, Jan 30	Thursday, Jan 31	Friday, Feb 1	Monday, Jan 28	Tuesday, Jan 29	Wednesday, Jan 30	Thursday, Jan 31	Friday, Feb 1
7:00															
8:00															
9:00															
10:00	SCHEDULED FOR WORK (1220 OAK AVE - STEPHANIE)	SCHEDULED FOR WORK (1220 PULGAS AVE - STEPHANIE)	SCHEDULED FOR WORK (1220 KENTUCKY ST - REDWOOD CITY - 94061) Name: CADENA, MARIA Refugio Phone #: (831) 235-1497 Furnace install with Alfredo	SCHEDULED FOR WORK (1021 POLK ST UNIT 10 - SALINAS - 93906) Name: MANERO, TINA Refugio Phone #: (831) 235-1497 Furnace install with Oscar	SCHEDULED FOR WORK (526 PALM AVE APT A - SEASIDE - 93955) Name: CLARE, MICHELLE SAMPSON, RHONDA Phone #: (650) 384-9740 HEATER WITH OSCAR	SCHEDULED FOR WORK (100 N RODEO GUICH RD SPC 141 - SOQUEL - 95073) Name: LEE, KYLE Phone #: (831) 227-6934, WATER HEATER	SCHEDULED FOR WORK (1220 OAK AVE GREENFIELD - 95927 -) Name: CADENA, MARIA Refugio Phone #: (831) 235-1497 Furnace install with Oscar	SCHEDULED FOR WORK (1021 POLK ST UNIT 10 - SALINAS - 93906) Name: MANERO, TINA Refugio Phone #: (831) 235-1497 Furnace install with Oscar	SCHEDULED FOR POST-INSTALLATION	SCHEDULED FOR POST-INSTALLATION	SCHEDULED FOR POST-INSTALLATION	SCHEDULED FOR POST-INSTALLATION	SCHEDULED FOR POST-INSTALLATION	SCHEDULED FOR POST-INSTALLATION	HCD INSPECTION
11:00															
12:00 PM															
1:00															
2:00	SCHEDULED FOR WORK (19205 EL CERRITO)	SCHEDULED FOR WORK (9740 WITH ALFREDO)	#1 (650) 388-8058 With Isaac								SCHEDULED FOR WORK (2465 CABRILLO)	SCHEDULED FOR WORK (924 CHULA VISTA AVE - BURLINGAME)	SCHEDULE		

Different views for Calendar and Crew Leaders

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- Scheduling
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 - Appointment Schedule
- Crew Time Entry
- Weatherization Marketing
- UA Marketing from Weatherization Jobs Completed
- Weatherization Admin
 - Job Reporting
 - Unreport Jobs
- Performance Measure Checklist
- Contract Expense Entry
- Ineligible Address List
- CSD WXDB Reporting
 - CSD WXDB Rejected Records
 - CSD WXDB Data Transfer History
 - CSD WXDB EARS Reconciliation Activity
 - CSD WXDB Prior Period Adjustments
- LIEE Refrigerator Program
 - LIEE Refrigerator List
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 - PG&E Refrigerator Invoice
 - PG&E Refrigerator Customer List
 - PG&E Refrigerator Recycling Receipts
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 - LIWP CIR Calculator
 - LIWP Eligible Weatherized Dwellings
 - LIWP Census Tract Map
- Toilet Retrofit Program
 - TRP Eligible Weatherized Dwellings
- Vehicle Management
 - Vehicle List
 - Gas Invoices

Appointment Schedule

View Job Refresh List Export to Print Schedule Print Schedule - New Map View Color Key Enter Search Criteria...

LIWP Census Tract Eligible	TRP Geographically Eligible	Job ID	ACC	Job Type	Current Status	WSAG Signed Date	Est. Hours	List Name	Phone	Service Address
		48591		INITIAL WEATHERIZATION	NO STATUS	9/17/2015				583 GAMAY PL
		46797		PRIVATE CONTRACTING	NO STATUS	11/27/2017		ECKHAUS, ENRIQUE	(831) 794-2461	PO BOX 783
		46572		PRIVATE CONTRACTING	NO STATUS	12/8/2017		DANKERT, PAUL	(408) 739-1403	210 KELLER DR
		48580		LIEE REFRIGERATOR REPLACE	NO STATUS	12/12/2018		FERRELL, LA CENE	(831) 252-8220	2395 DELAWARE AVE
		47407		INITIAL WEATHERIZATION	NO STATUS	5/10/2018		THOMPSON, RACHEL	(831) 706-6656	505 SMITH VALLEY RD
		47265		INITIAL WEATHERIZATION	NO STATUS	4/15/2018		ALONZO, GARY	(831) 770-9043	717 MIDDLE FIELD RD
		47688		INITIAL WEATHERIZATION	NO STATUS	7/28/2018		SHNEYDER, IOSIF	(650) 756-3266	24 GARDEN GROVE DR
		48579		LIEE REFRIGERATOR REPLACE	NO STATUS	10/1/2018		CARCAMO, TARA	(831) 707-0730	312 EAST LAKE AVE
		47350		REWEATHERIZATION	NO STATUS	4/26/2018		CUEVAS, ESPERIDION	(831) 596-8116	318 PINGREE WAY
		7452		INITIAL WEATHERIZATION	NO STATUS	5/20/2018		ESQUIVEL, DANIEL	(831) 737-2592	1236 SAN ANTONIO DR
		7462		INITIAL WEATHERIZATION	NO STATUS	5/25/2018		CASTANEDA, MONIQUE	(831) 682-3097	1947 ALISAL RD
		7417		REWEATHERIZATION	NO STATUS	4/17/2018		GARNER, JACQUE	(831) 332-6640	10035 HIGHWAY 9 APT
		74162		INITIAL WEATHERIZATION	NO STATUS	7/2/2018		CORONEL, ABE	(831) 798-6501	276 NOICE DR

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January - March, 2019

Day Work Week Month Timeline

OSCAR RICO MENDOZA

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
January 27	28	29	30	31	February 1	2
				9:45 AM - 3:30 PM SCHEDULED FOR WORK (1220 OAK AVE - 93927 -)		
3	4	5	6	7	8	9
10	11	12	13	14	15	16

ALFREDO RICO MENDOZA

Sunday	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday
January 27	28	29	30	31	February 1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16

Color of the job type, text, indicates specific job timeframes are nearing an end

Appointment Schedule

View Job | Refresh List | Export to | Print Schedule | Print Schedule - New | Map View | **Color Key**

	LIWP Census Tract Eligible	TRP Geographically Eligible	Job ID	ACC	Job Type	Current Status	Crew Leader
	✓	✓	164		INITIAL WEATHERIZATION	NO STATUS	
	⚠	⚠	389		INITIAL WEATHERIZATION	NO STATUS	
	⚠	⚠	453	60044	INITIAL WEATHERIZATION	NO STATUS	
	⚠	✓	554		REWEATHERIZATION	NO STATUS	
	✓	✓	600		INITIAL WEATHERIZATION	NO STATUS	
	✓	✓	47	26849	INITIAL WEATHERIZATION	NO STATUS	
	✓	✓	46	26932	INITIAL WEATHERIZATION	NO STATUS	
	✓	✓	44	28342	INITIAL WEATHERIZATION	NO STATUS	
	✓	✓	60	28866	INITIAL WEATHERIZATION	NO STATUS	
	⚠	⚠	45	28878	INITIAL WEATHERIZATION	NO STATUS	
	✓	✓	7	27416	INITIAL WEATHERIZATION	NO STATUS	
	✓	✓	75		INITIAL WEATHERIZATION	NO STATUS	
	✓	✓	61	28037	INITIAL WEATHERIZATION	NO STATUS	
	✓	✓	59	29440	INITIAL WEATHERIZATION	NO STATUS	

Page 1 of 1 (24 items) 1

Jan 28 - Feb 1, 2019

The Color Key can help plan which dwellings to schedule

Appointment Schedule

View Job | Refresh List | Export to | Print Schedule | Print Schedule - New | Map View | Color Key

	LIWP Census Tract Eligible	TRP Geographically Eligible	Job ID	ACC	Job Type	Current Status	Crew Leader	WSAG Signed Date
	✓	✓	154		INITIAL WEATHERIZATION	NO STATUS		9/24/2015
	ⓘ	ⓘ	389		INITIAL WEATHERIZATION	NO STATUS		12/30/2016
	ⓘ	ⓘ	453	60044	INITIAL WEATHERIZATION	NO STATUS		2/27/2017
	ⓘ	✓	554		REWEATHERIZATION	NO STATUS		2/6/2018
	✓	✓						12/7/2018
	✓	✓						2/27/2013
	✓	✓						3/4/2013
	✓	✓						6/6/2013
	✓	✓						11/20/2013
	ⓘ	ⓘ						8/8/2013
	✓	✓						12/3/2013
	✓	✓						11/19/2013
	✓	✓						6/18/2014
	✓	✓						7/24/2014

Page 1 of 1 (24 items) | 1

Jan 28 - Feb 1, 2019

JOSE CANO - CREWLEADER

JOSE CANO - CREWLEADER

	Monday, Jan 28	Tuesday, Jan 29	Wednesday, Jan 30	Thursday, Jan 31	Friday, Feb 1
7 am					
8 am					

Appointment Scheduling List Color Key

Status - NO STATUS, READY TO ASSESS, SCHEDULED FOR ASSESSMENT

Certification or Recert Date is between 91 and 120 Days Ago

Certification or Recert Date is between More Than 120 Days Ago

Certification or Recert Date is Less Than 90 Days Ago

All Other Statuses

Assessment Date is between 91 and 180 Days Ago

Assessment Date is More Than 180 Days Ago

Assessment Date is blank or Less Than 90 Days Ago

Set a job status filter to help you schedule

Central Coast Energy Services, Inc. [US] | <https://www.servtraqazure.com/CalendarEF>

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Appointment Schedule

View Job | Refresh List | Export to | Print Schedule | Print Schedule - New | Map View | Color Key

LIWP Census Tract Eligible	TRP Geographically Eligible	Job ID	ACC	Job Type	Current Status	Crew Leader	WSAG Signed Date	Est. Hours	List Name
		34277		ECIP HEATING/COOLING ONLY	APPOINTMENT KEPT				
		34264		INITIAL WEATHERIZATION	APPOINTMENT KEPT				
		36459		INITIAL WEATHERIZATION	APPOINTMENT KEPT				
		36481		INITIAL WEATHERIZATION	APPOINTMENT KEPT				
		36493		INITIAL WEATHERIZATION	APPOINTMENT KEPT				
		36502		REWEATHERIZATION	APPOINTMENT KEPT				
		36503		REWEATHERIZATION	APPOINTMENT KEPT				
		36504		INITIAL WEATHERIZATION	APPOINTMENT KEPT				
		20771		INITIAL WEATHERIZATION	ASSESS IN PLACE JOB				
		29454		WATER DEMAND REDUCTION	ASSESS IN PLACE JOB				
		36349		ECIP HEATING/COOLING ONLY	ASSESSED				
		36434		INITIAL WEATHERIZATION	ASSESSED				
		36482		INITIAL WEATHERIZATION	ASSESSED				

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Jan 28 - Feb 1, 2019

CREW AWESOME, CREW B, CREW C

	Monday, Jan 28	Tuesday, Jan 29	Wednesday, Jan 30	Thursday, Jan 31	Friday, Feb 1	Monday, Jan 28	Tuesday, Jan 29	Wednesday, Jan 30	Thursday, Jan 31	Friday, Feb 1
7:00										
8:00										
9:00										

READY TO ASSESS

OK Cancel

Use various filters and fields to assist you in setting up your schedule

Appointment Schedule

View Job

Refresh List

Export to

Print Schedule

Print Schedule - New

Map View

Color Key

Enter Search Criteria...

	LTWP Census Tract Eligible	TRP Geographically Eligible	Job ID	ACC	Job Type	Current Status	Crew Leader	WSAG Signed Date	Est. Hours	List Name	Phone	Service Address
			48606		REWEATHERIZATION	READY TO ASSESS	MICHAEL F DE GUZMAN	1/2/2019				322 HEAD ST
			43420		INITIAL WEATHERIZATION	READY TO ASSESS		3/12/2017	2.5	ROBINSON, JEAN	(650) 992-2585	318 HIGATE DR UNIT A
			48173		INITIAL WEATHERIZATION	READY TO ASSESS		8/29/2018	2.5	VARGAS, MARINA	(831) 210-3713	1655 LITTLE RIVER DR
			48004		INITIAL WEATHERIZATION	READY TO ASSESS	MICHAEL F DE GUZMAN	5/1/2018		AGUILA, ROSA	(415) 431-4518	629 BUCHANAN ST
			47012		ASSESS/DIAGNOSTIC ONLY	READY TO ASSESS	JAMES O MADRIAGA	2/26/2018		LI, KEN	(415) 519-7327	506 BELLEVUE AVE
			43357		INITIAL WEATHERIZATION	READY TO ASSESS		4/7/2017	2.5	RICCA, MARTHA	(831) 210-7811	68 VILLA ST APT E
			46410		ASSESS/DIAGNOSTIC ONLY	READY TO ASSESS	JAMES O MADRIAGA	10/2/2017		TRAN, DANNY	(415) 239-1501	1011 SAN GABRIEL CIR
			47346		INITIAL WEATHERIZATION	READY TO ASSESS		4/25/2018	2.5	CHANG, KUN	(831) 649-8932	406 ALCALDE AVE
			41901		INITIAL WEATHERIZATION	READY TO ASSESS		5/11/2016	2.5	KIRBY, JONECE	(831) 449-9474	55 SAN JUAN GRADE R
			43684		INITIAL WEATHERIZATION	READY TO ASSESS		7/6/2017	2.5	JEROME, KIMBERLY	(650) 879-0224	3050 WHITEHOUSE CR
			41971		INITIAL WEATHERIZATION	READY TO ASSESS		6/20/2016	2.5	JOYCE, RICHARD	(831) 774-2903	303 FRONT ST APT 203
			43448		INITIAL WEATHERIZATION	READY TO ASSESS		5/5/2017		ST JOHN, MARY JO	(650) 921-0172	1026 EL CAMINO REAL
			47277		INITIAL WEATHERIZATION	READY TO ASSESS		4/19/2018	2.5	LARIOS, EVA	(650) 799-6780	1358 HOLLYBURNE AVE
			46558		INITIAL WEATHERIZATION	READY TO ASSESS		11/20/2017	2.5	KNOX, TERESA	(831) 515-7495	1770 17TH AVE SPC 35

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Page 1

Current Status

Equals

READY TO ASSESS

Jan 28 - Feb 1, 2019

Day

Work Week

Month

Timeline

OSCAR RICO MENDOZA

Monday, Jan 28

Tuesday, Jan 29

Wednesday, Jan 30

Thursday, Jan 31

Friday, Feb 1

ALFREDO RICO MENDOZA

Monday, Jan 28

Tuesday, Jan 29

Wednesday, Jan 30

Thursday, Jan 31

Friday, Feb 1

EDUARDO B REYES

Monday, Jan 28

Tuesday, Jan 29





Wednesday, Jan 30

Thursday, Jan 31

Friday, Feb 1

7:00															
8:00															
9:00															
10:00	SCHEDULED FOR WORK (1220 KADEN -)	SCHEDULED FOR WORK (1220 KADEN -)	SCHEDULED FOR WORK (1721 KENTUCKY ST - REDWOOD)	SCHEDULED FOR WORK (1220 OAK AVE - 93927 -) Name: CADENA, MARIA REFUGIO	SCHEDULED FOR WORK (1021 POLK ST UNIT 10 - SALINAS - 93906) Name: MANERO, TINA Phone #: (831) 235-1497 Furnace	SCHEDULED FOR WORK (526 PALM AVE APT A - SEASIDE - 93955) Name: CLAIRES, MICHELE	SCHEDULED FOR WORK (2020 PULGAS AVE - PALO ALTO - 94303 -) Name: CAMERON	SCHEDULED FOR WORK (100 N RODEO GULCH RD SPC 141 - SOQUEL - 95073) Name: LEE, KYLE Phone #: (831) 227-	SCHEDULED FOR WORK (1220 OAK AVE GREENFIELD - 93927 -) Name: CADENA, MARIA	SCHEDULED FOR WORK (1021 POLK ST UNIT 10 - SALINAS - 93906) Name: MANERO, TINA Phone #: (831) 235-1497 Furnace	SCHEDULED FOR POST-...	SCHEDULED FOR POST-...	SCHEDULED FOR POST-...	SCHEDULED FOR POST-...	SCHEDULED FOR POST-...
11:00	SCHEDULED FOR WORK (1220 KADEN -)	SCHEDULED FOR WORK (1220 KADEN -)	SCHEDULED FOR WORK (1721 KENTUCKY ST - REDWOOD)	SCHEDULED FOR WORK (1220 OAK AVE - 93927 -) Name: CADENA, MARIA REFUGIO	SCHEDULED FOR WORK (1021 POLK ST UNIT 10 - SALINAS - 93906) Name: MANERO, TINA Phone #: (831) 235-1497 Furnace	SCHEDULED FOR WORK (526 PALM AVE APT A - SEASIDE - 93955) Name: CLAIRES, MICHELE	SCHEDULED FOR WORK (2020 PULGAS AVE - PALO ALTO - 94303 -) Name: CAMERON	SCHEDULED FOR WORK (100 N RODEO GULCH RD SPC 141 - SOQUEL - 95073) Name: LEE, KYLE Phone #: (831) 227-	SCHEDULED FOR WORK (1220 OAK AVE GREENFIELD - 93927 -) Name: CADENA, MARIA	SCHEDULED FOR WORK (1021 POLK ST UNIT 10 - SALINAS - 93906) Name: MANERO, TINA Phone #: (831) 235-1497 Furnace	SCHEDULED FOR POST-...	SCHEDULED FOR POST-...	SCHEDULED FOR POST-...	SCHEDULED FOR POST-...	SCHEDULED FOR POST-...
12 PM	SCHEDULED FOR WORK (1220 KADEN -)	SCHEDULED FOR WORK (1220 KADEN -)	SCHEDULED FOR WORK (1721 KENTUCKY ST - REDWOOD)	SCHEDULED FOR WORK (1220 OAK AVE - 93927 -) Name: CADENA, MARIA REFUGIO	SCHEDULED FOR WORK (1021 POLK ST UNIT 10 - SALINAS - 93906) Name: MANERO, TINA Phone #: (831) 235-1497 Furnace	SCHEDULED FOR WORK (526 PALM AVE APT A - SEASIDE - 93955) Name: CLAIRES, MICHELE	SCHEDULED FOR WORK (2020 PULGAS AVE - PALO ALTO - 94303 -) Name: CAMERON	SCHEDULED FOR WORK (100 N RODEO GULCH RD SPC 141 - SOQUEL - 95073) Name: LEE, KYLE Phone #: (831) 227-	SCHEDULED FOR WORK (1220 OAK AVE GREENFIELD - 93927 -) Name: CADENA, MARIA	SCHEDULED FOR WORK (1021 POLK ST UNIT 10 - SALINAS - 93906) Name: MANERO, TINA Phone #: (831) 235-1497 Furnace	SCHEDULED FOR POST-...	SCHEDULED FOR POST-...	SCHEDULED FOR POST-...	SCHEDULED FOR POST-...	SCHEDULED FOR POST-...

Edit and alter your job status to better suit the flow of work at your agency

Home	Lookup Table Data Administration - Dwelling/Job Statuses									
Contacts	Select a data type: Dwelling/Job Status Administration									
HEAP		Status Display	Status Explanation	Job Stage	Show on Tracking Sheet?	Priority	Active?	Field Designation Allowed?	Appointment Scheduling Status	
Weatherization	  	PERMIT PENDING	JOB ON HOLD DUE TO PERMIT PROBLEM	3	Yes		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Inventory	  	POST-WX INSPECTION COMPLETED	QA HAS BEEN COMPLETED	12	Yes		12	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Reports	  	PROPOSAL ACCEPTED FOR SUB HCS	SUBCONTRACTOR ESTIMATE FOR FURNACE REPAIR/REPLACE HAS BEEN ACCEPTED.	03E	No		8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Analytics	  	READY FOR REFRIGERATOR DELIVERY	DWELLING IS READY FOR US TO CALL AND SCHEDULE AND APPOINTMENT FOR REFRIG DELIVER	03L	No		3	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Administration	  	READY FOR WORK APPT TO BE SCHEDULED	MATERIALS IN, SUB WORK DONE, JOB READY TO BE SCHEDULED AND COMPLETED	03A	No		5	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agency User Management	  	READY TO ASSESS	READY TO SCHEDULE FOR ASSESSMENT (1ST APPOINTMENT CANCELLED FOR ASSESSMENT)	01	No		1	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Agency Details	  	READY TO SCHED DRIVE-BY POST-WX INSPECTION	READY TO SCHEDULE FOR DRIVE-BY POST-WX INSPECTION	11	Yes		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Data Administration	  	READY TO SCHEDULE POST-WX INSPECTION	ES MANAGER HAS SELECTED JOB FOR A QA INSPECTION	11	Yes		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Human Resources	  	RECERTIFICATION OF ELIGIBILITY HOLD	NO ASSESSMENT W/IN 120 DAYS OF ELIGIBILITY DETERMINATION (INTAKE DATE)	01	No		8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	  	RECERTIFIED	APPLICANT INCOME RECERTIFIED FOR 120 DAY RULE	01	Yes		8	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	  	REFERRED TO SUB FOR HCS WORK	SUBCONTRACTOR HAS BEEN ASKED TO DO A FURNACE REPAIR	03E	No		8	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	  	SCHEDULE FOR RE-ASSESSMENT AFTER SUB WORK	AFTER A SUBCONTRACTOR HAS COMPLETED WORK, THE ASSESSOR NEEDS TO CHECK IT	07	No		1	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	  	SCHEDULED FOR ASSESSMENT	AN APPOINTMENT HAS BEEN MADE TO DO AN ASSESSMENT	01	No		9	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	  	SCHEDULED FOR POST-WX INSPECTION	AN APPOINTMENT HAS BEEN MADE FOR A QA INSPECTION	11	Yes		7	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
	  	SCHEDULED FOR REFRIGERATOR DELIVERY	APPOINTMENT TO DELIVER REFRIGERATOR HAS BEEN SCHEDULED	05L	No		7	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	  	SCHEDULED FOR RHA INSPECTION	JOB IS BEING SCHEDULED FRO RHA INSPECTION	12	Yes		14	<input type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>
	  	SCHEDULED FOR WORK	AN APPOINTMENT HAS BEEN MADE TO DO WORK	05	No		7	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input checked="" type="checkbox"/>

LIVE DEMO

ServTraq Support



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- Phone: 831-761-1747
- ServTraq Support Chat:
<https://www.servtraqazure.com/Support.aspx>