

Wx Job Entry from Intake Referrals

Go to the Weatherization Menu > Dwelling/Job Search

Enter the **Place of Service Address (POS)** and click submit.

- A. If no results are found, click NEW DWELLING to add the dwelling to ServTraq first. (Note: a POS should only have 1 Dwelling ID).
- B. If a match is found on the POS, click NEW Job to create a new Job ID. (Note: a POS can have multiple jobs associated (ie. Rewx, Initial, Private, ECIP).

The screenshot shows the 'Dwelling/Job Search' page. On the left is a navigation menu with options: Home, Contacts, HEAP, Weatherization, Dwelling/Job Search (selected), Scheduling, Open Jobs List, Appointment Schedule, Crew Time Entry, Weatherization Marketing, UA Marketing from Weatherization, Weatherization Admin, Job Reporting, Unreport Jobs, Performance Measure Checklist, Contract Expense Entry, and Ineligible Address List. The main area is titled 'Dwelling/Job Search' and contains a 'Search Parameters' form. The form fields are: POS Address (11870, MONARCH, Unit Number), POS Zip/City (92841, GARDEN GROVE), Name (First Name, Last Name), Social Security Number, Home Phone (Area Code, Phone Number), Permit Number, and Reverse Lookup (JobID, DwellingID). There are 'Submit' and 'Clear' buttons. Below the form is a toolbar with 'New Dwelling', 'New Job', 'Edit Job', 'Refresh', and 'Export' buttons. At the bottom is a table with columns: Dwelling ID, Job ID, Completed Date, Closed Date, and Job Type.

Dwelling ID	Job ID	Completed Date	Closed Date	Job Type
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- A. If you clicked NEW Dwelling, this dwelling **has not been entered before** you will need to fill in all the required fields on the **Dwelling Details** Page. Click **Save** when finished and ServTraq will redirect you to the **Job Details** page.
- B. If you clicked, NEW Job, the dwelling **has been entered previously**, simply update the information, click **Save** and scroll to the "Job" section to add a new job.

Edit Dwelling
New Dwelling/Job

Dwelling Details

WSAG Signed Date*: 4/16/2016

Job Type*: INITIAL WEATHERIZATION

MUD Info:

MUD Complex

MUD Building

Tenancy*: OWNER OCCUPIED

Permit Info:

Issue Date

Permit Number

Parcel Number:

Notes:

Dwelling Address

Line 1:

121

SAN LUCAS

COURT

Address #

Address Street*

Street Type

Line 2:

Building Type

Unit Number

Line 3:

95077

WATSONVILLE

SANTA CRUZ

CA

Zip Code*

City*

County*

State*

Address Verification: San Lucas Ct, Watsonville, CA 95076, USA

Formatted Address

LIWP Eligibility: 6087110400

76-80

✓

Census Tract

CES Percentile Score

TRP Eligibility: PAJARO VALLEY

NO/YES/YES

HIGH

✓

Groundwater Basin Name

DAC Block Group/Tract/Place?

Basin Priority

Add a New Job

Click on the *addition* button and select the *Job Type* from the Job ID menu and click the *floppy disk* icon to save. Close the *Dwelling Details* page and open the *Job ID Details* page.

Jobs		
	Job ID	JobType
	36374	INITIAL WEATHERIZATION

Jobs

	Job ID	JobType	Job Close Date	Job Completed Date	Reported Date
JobType: INITIAL WEATHERIZATION					

In the Job Details Page:

A. Link the Job to a Customer Record

In the *Customer* field box, enter the customer's name (tenant, not owner). If too many results are displayed, use additional search fields (SSN, DOB etc) to narrow the results displayed.

Link Eligibility

Customer: lolia joiner

First Name	Last Name	SSN	Date of Birth	Area Code	Phone
LOLIA	JOINER			831	6016607
LOLIA	JOINER	mmGAp04A2dJ3MeHR97dO4w==	3/15/1975	831	6012559

B. Link the Job to an Eligibility Record

Click on the Drop down menu in the Existing Eligibility Records section.

If there's an **existing eligible** LIHEAP Utility Assistance Application for the customer, it will appear on the drop down menu. You can use the UA eligibility record to link the Job.

Edit Job
JobID - 47826, 2324 PULGAS AVE, EAST PALO ALTO, 94303

Link Eligibility

Customer: SILVIA CARBALLO

Existing Eligibility Records:

New	Application ID	POS Address	POS City	POS Zip Code	County Name	Certification Date
→	295137	1780 44TH AVE APT B	CAPITOLA	95010	SANTA CRUZ	10/26/2018

Assessment Date:
 Dwelling Year Built:
 HUD Funded?:
 Heating Energy: NATURAL GAS

If you do not have eligibility record entered, or if the certification will soon expire, click on the "NEW" button to create a new (short-form) eligibility record with updated information. You can also use the "Short-Form" if the client has declined Payment Assistance but is interested in Wx services.

Save Save and Close Exit Delete Refresh Link Unlink Jobsheet Details Clone Job

Edit Job
JobID - 36515, 200 MAIN ST 2, OROVILLE, 95965

Link Eligibility

Customer:
 Existing Eligibility Records:
 Dwelling Assessment:
 Assessment Date:
 Dwelling Year Built:
 HUD Funded?:
 Heating Energy:
 Certification Date:
 No data to display

Once you've selected the customer and the eligibility record, link them together by clicking the "Link" button at the top. Be Sure to click "Save" after they are linked together.

Central Coast Energy Services, Inc. [US] | <https://www.servprodata.com/job/JOBID=36516&WellingID=204320&Mac=12160016243010000074300017700>

Save Save and Close Exit Delete Refresh **Link** Unlink Jobsheet Details Clone Job

Sections

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

Related

- Appointments

Edit Job
JobID - 36516, 1357 MONTEREY ST, SOLEDAD, 93960

Link Eligibility

Customer: JUAN ACEDES
Existing Eligibility Records: 119258

Dwelling Assessment Items

Assessment Date:
Dwelling Year Built:
Cooking Oper. Status: OPERATIONAL
Heater Type: