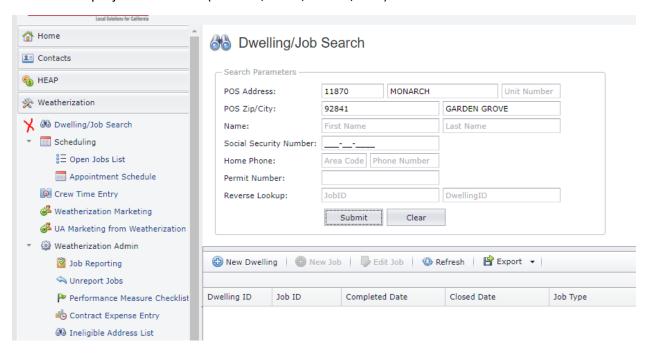# Wx Job Entry from Intake Referrals
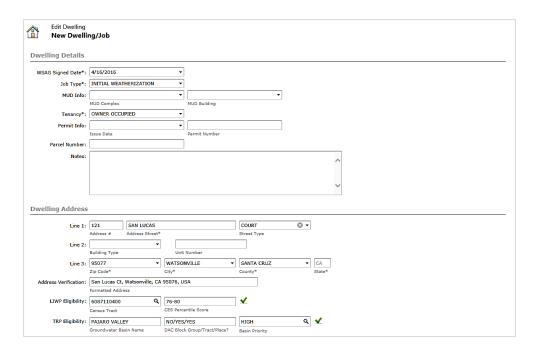
Go to the Weatherization Menu> Dwelling/Job Search

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).
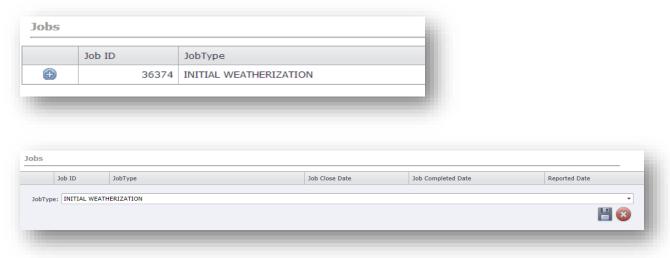

A. If you clicked NEW Dwelling, this dwelling **has not been entered before** you will need to fill in all the required fields on the **Dwelling Details** Page. Click **Save** when finished and ServTraq will redirect you to the **Job Details** page.

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.
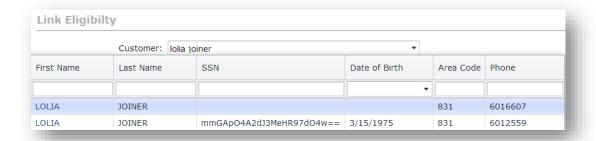
Add a New Job

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.

In the Job Details Page:
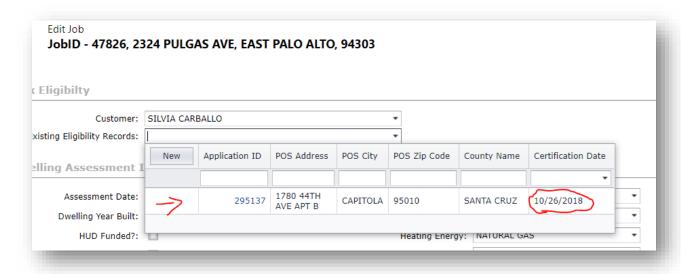
    A. Link the Job to a Customer Record

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.
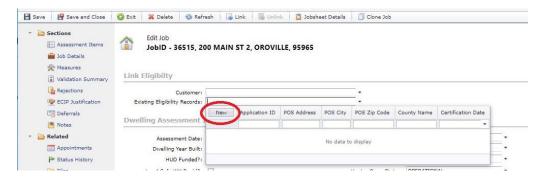
B. Link the Job to an Eligibility Record

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.

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.

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.