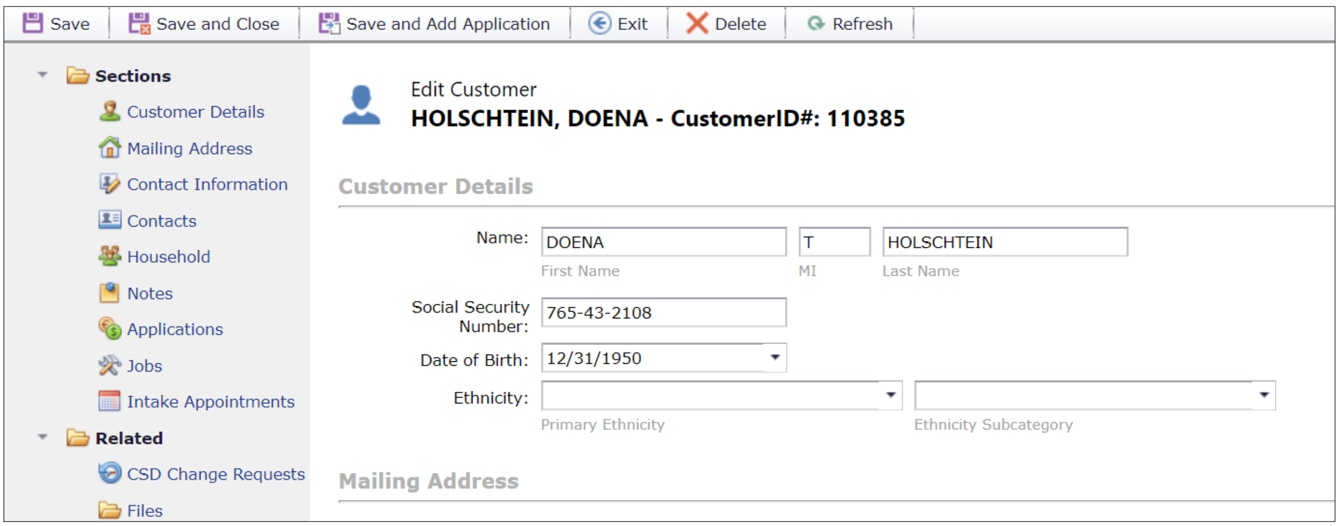
2.2 Customer Record

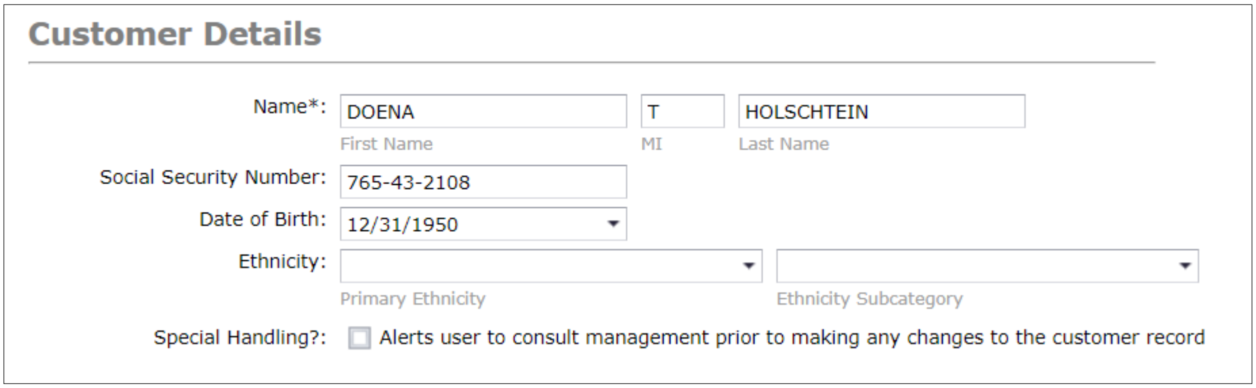
The Customer Record is where any and all relevant information pertaining to the customer is stored. This includes, but is not limited to: personal data, customer-agency communication, past and current payment assistance applications and Weatherization jobs, and scheduled appointments



	ICON KEY
	Save the customer record
	Save and close the customer record
	Save the customer record and add a payment assistance application
	Exit without saving
	Delete the customer record
	Refresh the customer record

1. Customer Details

The Customer Details section is designed to track customer personal information. Fill out the following fields below:

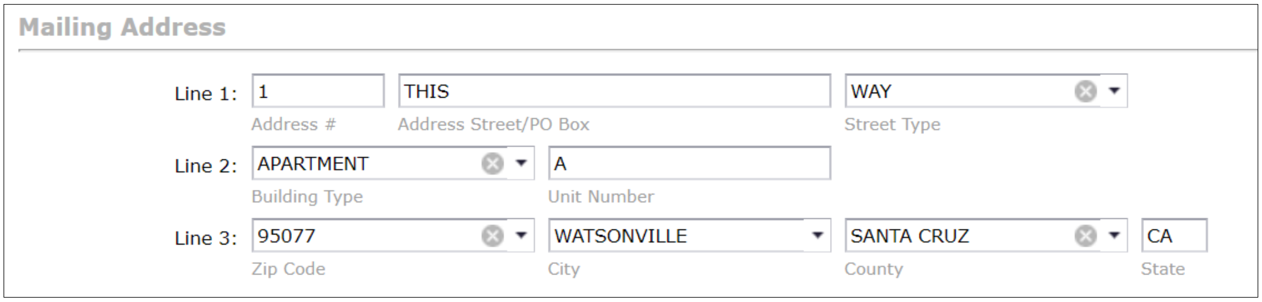


ENTRY FIELDS	DESCRIPTION
Name	① First Name* ② Middle Initial ③ Last Name*
Social Security Number	The customer's 9-digit SSN
Date of Birth	Customer's DOB in the following format: MM/DD/YYY
Ethnicity	① Primary Ethnicity ② Ethnicity Subcategory
Special Handling?	Check ☑ if the customer/record requires additional review from management

Required fields are denoted with a red asterisk. (*)

2. Mailing Address

The Mailing Address is tracked through this section. To add a *Mailing Address*, see the fields listed in the table below.

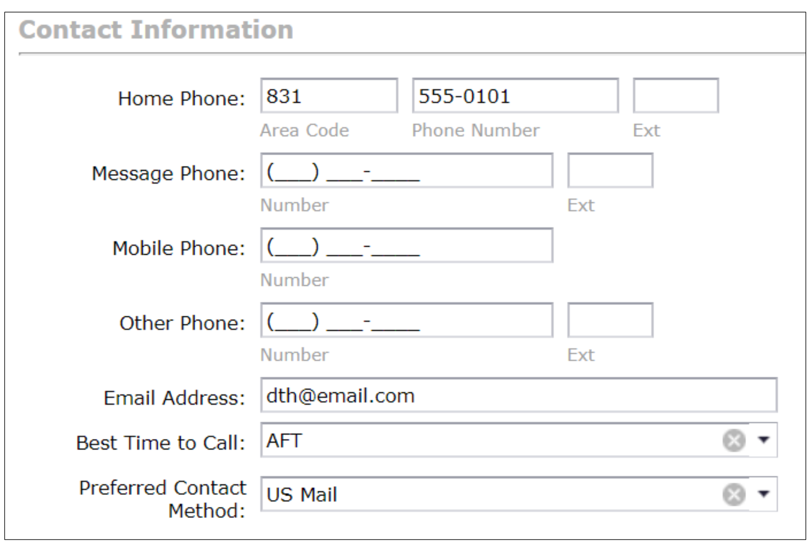


ENTRY FIELDS	DESCRIPTION
Line 1	① Address Number ② Street Name/PO Box ③ Street Type
Line 2	① Building Type ② Unit Number
Line 3	① Zip Code ② City***** ③ County***** ④ State*****

***These fields automatically populate after the zip code is entered.**

3. Contact Information

The Contact Information section is used to track various phone numbers as well as an e-mail address. To add *Contact Information*, see the fields listed below.



ENTRY FIELDS	DESCRIPTION
Home Phone	Landline phone number
Message Phone	Phone number capable of receiving messages
Mobile Phone	Cellular mobile phone number
Other Phone	Other contact phone number
Email Address	Email address for online communication, receipts, confirmations, etc.
Best Time to Call	**Select from:** ① Afternoon (AFT) ② Evening (EVE) ③ Morning (MORN) OR ④ None
Preferred Contact Method*	**Select from:** ① Email ② SMS Text Message OR ③ US Mail

Required fields are denoted with a red asterisk. (*)

4. Contacts (Contact Entry Note)

The Contacts section offers a simple way of tracking incoming and outgoing customer contact. This feature can be used for both weatherization and payment assistance programs and offers a streamlined way of automating tasks such as follow-up calls, mail-outs, or contact tracking.

Contacts

	Contact Date	Contact Type	Contact Action	Call Code	Language	Notes	Mailing Code	Mailing Date	Entered By
	3/7/2019	INCOMING	HEAP APPLICATION RECEIVED	NO ACTION REQ - RECORD ONLY	ENGLISH	CONTACT ACTION ADDED FROM APPLICATION RECEIVING SCREEN	NL - WRITTEN NOTIFICATION LETTER OF APPLICATION RECEIVED		SERVTRAQ SUPPORT

Create Filter

5. Household

This section will automatically display all household demographic information entered through the **Individual Household Members (CSBG Data)** option on the most recent Payment Assistance application.

Household - from the Most Recent Application with Household Members entered

First Name	MI	Last Name	Date Of Birth	SSN	Gender	Race	Relation to Applicant	Education Level
DOENA	T	HOLSCHTEIN	12/31/1950	765-43-2108	FEMALE	MULTI-RACE	SELF	HIGH SCHOOL GRADUATE/GED
OVALTINE		JENKINS	1/2/2003	- -	FEMALE	MULTI-RACE	GRANDCHILD	9-12/NON-GRADUATE
BRUTON		GASTER	4/5/2006	- -	MALE	MULTI-RACE	GRANDCHILD	0-8

NOTE

Household demographic information entered through the Summary – Numbers per category option will not be displayed here.

6. Notes

The Note section provides users with additional space for miscellaneous comments regarding the customer, their applications, scheduled jobs, etc.

Notes

	Note	Entry Date	Entered By	Last Updated Date	Last Updated By
	THIS IS A NOTE	3/26/2019	SERVTRAQ SUPPORT	3/26/2019	SERVTRAQ SUPPORT

Click the + icon, fill in the field shown in the table below, and click to save.

	Note	Entry Date	Entered By	Last Updated Date	Last Updated By

Note:*

Entered By: SERVTRAQ SUPPORT

7. Applications

The Applications section displays the customer's history of Payment Assistance applications by program year. Click on the PROGRAM link to view and edit an application.

Applications

Export to

	Program	Application Status	Intake Date	Transfer Date	Service Address	City	Zip Code	Utility	Account Number
▸	HEAP 2018	ELIGIBLE	12/3/2018		1 THIS A	WATSONVILLE	95077	PACIFIC GAS & ELECTRIC COMPANY	10223456789

Export to

	Program	Application Status	Intake Date	Transfer Date	Service Address	City	Zip Code	Utility	Account Number
▾	HEAP 2018	ELIGIBLE	12/3/2018		1 THIS A	WATSONVILLE	95077	PACIFIC GAS & ELECTRIC COMPANY	10223456789

Commitments/Pledges

Memo	Date Submitted	Entry Date	Entered By	Last Updated Date	Last Updated By
No data to display					

Click the small arrow next to the PROGRAM link to see any associated commitment/pledge for payment made by the agency for a particular customer and application.

DISPLAY FIELDS	DESCRIPTION
Program	Program and Program Year of application
Application Status	① Benefitted, ② Denied, ③ Eligible, ④ Transferred, ⑤ Rejected, OR ⑥ Corrected
Intake Date	Date the agency receives the application
Transfer Date	Date the application was transferred to CORE
Services Address	POS Street Address
City	POS City
Zip Code	POS Zip Code
Utility	Utility Type
Account Number	Utility account number (if applicable)

8. Jobs

The Jobs section displays the history of weatherization jobs that are linked to dwellings associated with the customer. All listed jobs display the associated Dwelling ID, job type, and current status among other details.

Jobs

Export to

Dwelling ID	Job ID	Job Type	Status	Job Completed Date	Reported Date	Service Address	City	Zip Code	County
28488	36582	DISGORGEMENT (DAP) JOB	IN PROGRESS			111 THIS ST	MARINA	93933	MONTEREY
28488	36534	REWEATHERIZATION	REPORTED	12/27/2018	4/15/2019	111 THIS ST	MARINA	93933	MONTEREY

9. Intake Appointments

The Intake Appointments section displays a history of scheduled intake appointments for the customer with the agency. Each scheduled appointment shows the date, time, and the employee scheduled to the meet with the customer among other details.

Intake Appointments

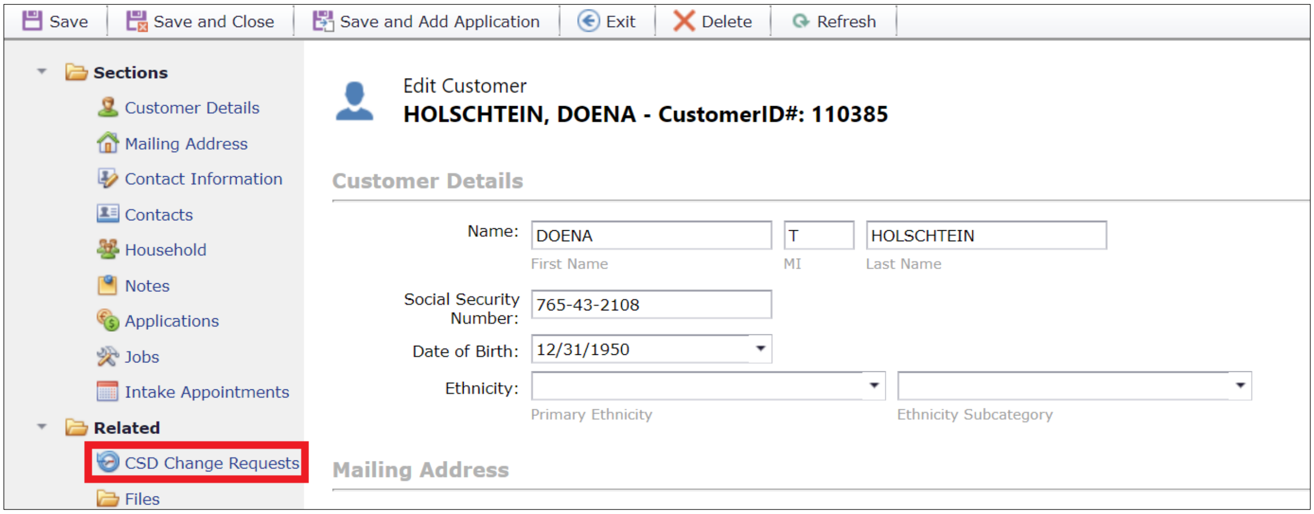
Appointment Date	Start Time	End Time	Appointment Type	Contact Info	Employee	Entered By	Entry Date
11/18/2019	7:00 AM	7:30 AM	DOENA HOLSCHTEIN - (831) 555-0101	Name: DOENA HOLSCHTEIN; Phone: (831) 555-0101;	JOHN JOHNSON	SERVTRAQ SUPPORT	11/18/2019 1:48 PM
11/5/2019	9:00 AM	9:30 AM	DOENA HOLSCHTEIN - (831) 555-0101	Name: DOENA HOLSCHTEIN; Phone: (831) 555-0101;	JOHN JOHNSON	SERVTRAQ SUPPORT	11/5/2019 3:11 PM
4/19/2019	9:00 AM	9:30 AM	DOENA HOLSCHTEIN - (831) 555-0101	Name: DOENA HOLSCHTEIN; Phone: (831) 555-0101;	JOHN JOHNSON	SERVTRAQ SUPPORT	4/19/2019 10:29 AM

10. CSD Change Requests

The CSD Change Requests feature is used to correct a customer's information in CORE that does not match with the customer's information in ServTraq. Users can submit requests from the convenience of the customer's record.

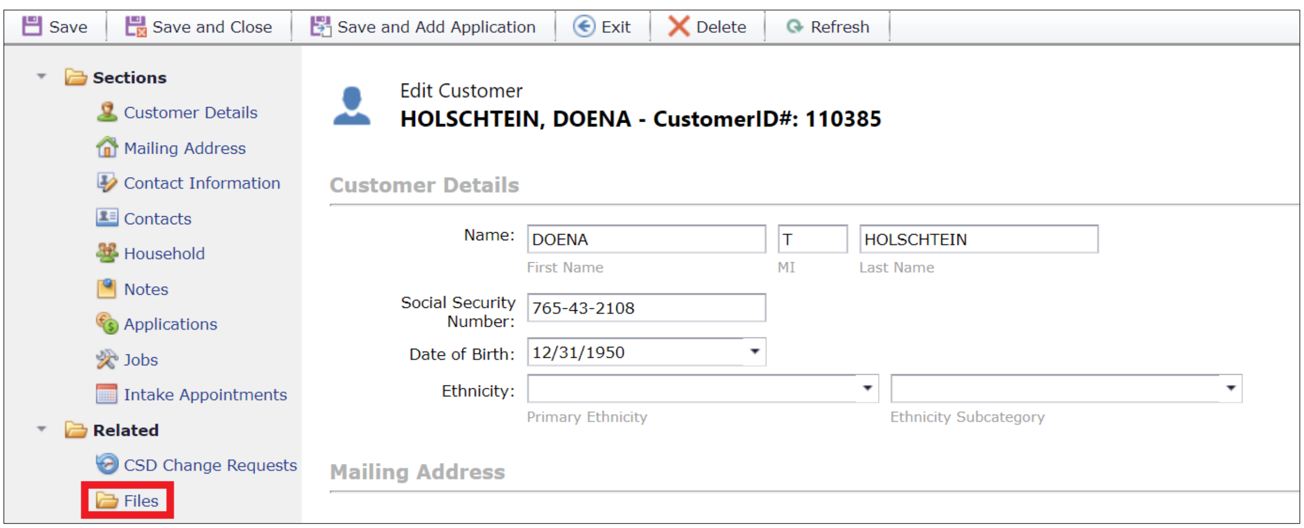
COMMON REASONS FOR CHANGE REQUESTS

- ⇨ Data entry error
- ⇨ Customer applied with different information (ex: Name, DOB, SSN) than previous year

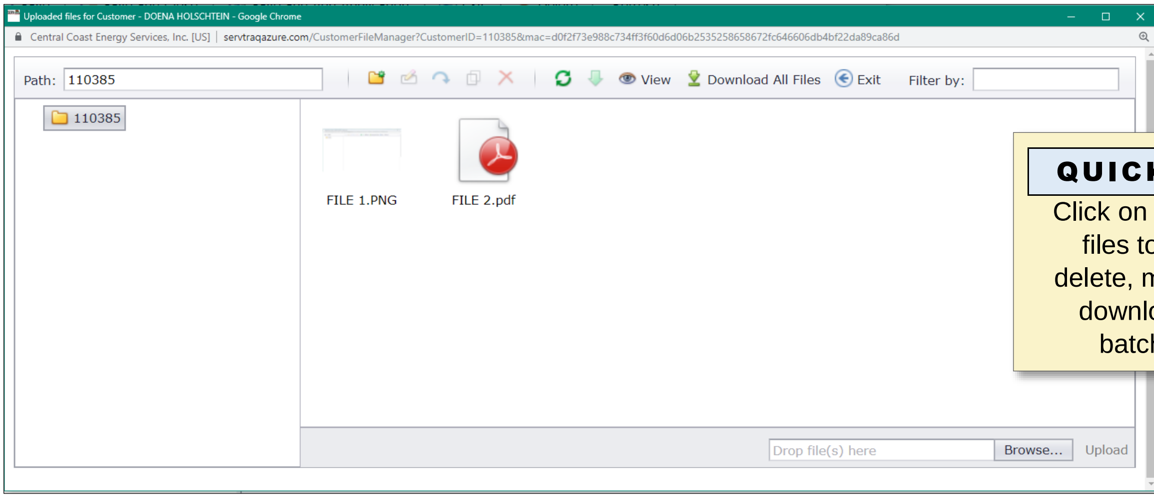


1I. Files

The Files section is available to upload any relevant documents belonging/pertaining to the customer.



Click on the **Files** link to open the external files window, as seen below.



QUICK TIP

Click on multiple files to edit, delete, move, or download in batches.

ICON KEY
Create new File folder
Rename folder or file
Move file to another folder
Copy file into another folder
Delete folder or file
Refresh file window
Download individual file
View files in different displays
Download all files
Exit files window