2.4 CSD Change Requests

A CSD Change Request is made when a customer's information in CORE does <u>not</u> match with the information in the agency's ServTraq database.

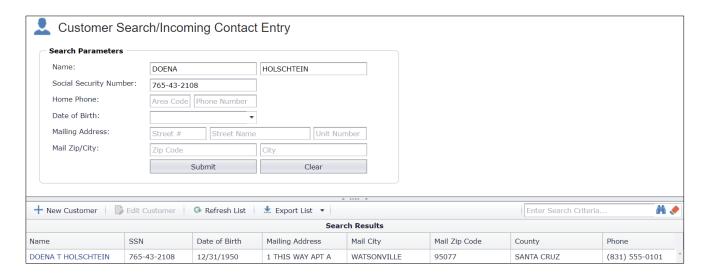
COMMON REASONS FOR CHANGE REQUESTS

- ⇒ Data entry error
- □ Customer applied with different information (e.g., Name, DOB, SSN) than previous year

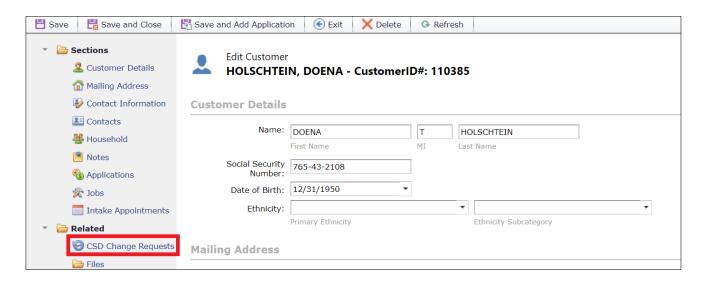
The CSD Change Requests feature can be found within the Customer Record under the **Related** section.

Make a Change Request

Search for the customer through the *Customer Search/Contact Entry* section. Click on the customer's <u>NAME</u> OR double click on the result to open the customer record.



Click on the CSD Change Requests link on the left panel OR scroll down to the section.



Click Add CSD Change Request.



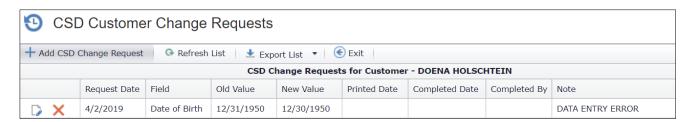
Fill out the following fields below and click \blacksquare to save the change request.

Request Date	Field	Old Value	New Value	Printed Date	Compl	leted Date	Comp	oleted By	Note	
Request Date: Old Value:* Completed Date	12/	/2019 31/1950			· ·	Field:* New Valu		Date of Bir 12/30/195		
Note:		ΓΑ ENTRY ERR	ROR				,			₽×
							Comp Con logg	oleted Da apleted B ed AFTE est is app by CSD.	te and y are R the	

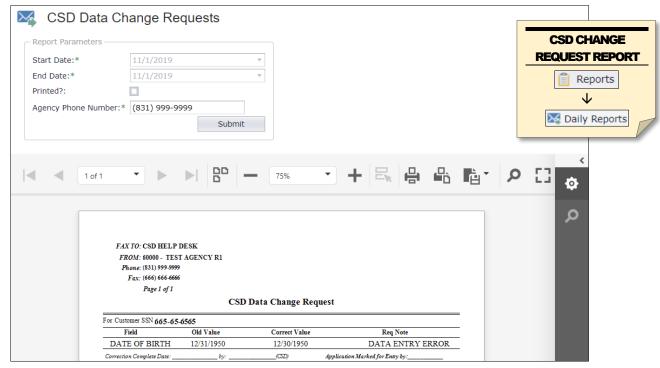
ENTRY FIELDS	DESCRIPTION					
Request Date	Date the request is made					
Field*	Select: ① First Name, ② Middle Initial, ③ Last Name					
	§ SSN, OR § Date of Birth					
Old Value*	Incorrect field information Correct field information Date the request is marked as printed Date the request is processed and fulfilled CSD Employee that processed the request Reason for the change request					
New Value*						
Printed Date*						
Completed Date						
Completed By						
Notes						

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

All saved change requests will appear under requests section.



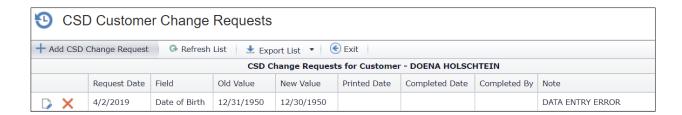
The change request is now available in an exportable/printable report format in the CSD Change Request Report section, as seen below, to be sent to CSD for approval.



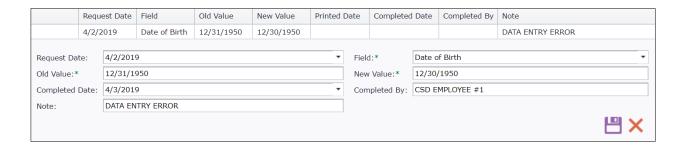
After CSD Confirmation

After receiving confirmation from CSD of the complete request:

Click the icon on the Change Request to edit.



Fill out the Complete Date and the Complete By fields.



Click **to** save.