

2.4 CSD Change Requests

A CSD Change Request is made when a customer's information in CORE does not 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 [NAME](#) OR double click on the result to open the customer record.

 Customer Search/Incoming Contact Entry

Search Parameters

Name:

DOENA

HOLSCHEIN

Social Security Number:

765-43-2108

Home Phone:

Area Code

Phone Number

Date of Birth:

Mailing Address:

Street #

Street Name

Unit Number

Mail Zip/City:

Zip Code

City

Submit

Clear

+ New Customer

Edit Customer

Refresh List

Export List

Enter Search Criteria...

Search Results

Name	SSN	Date of Birth	Mailing Address	Mail City	Mail Zip Code	County	Phone
DOENA T HOLSCHEIN	765-43-2108	12/31/1950	1 THIS WAY APT A	WATSONVILLE	95077	SANTA CRUZ	(831) 555-0101

Click on the [CSD Change Requests](#) link on the left panel OR scroll down to the section.

Save

Save and Close

Save and Add Application

Exit

Delete

Refresh

Sections

Customer Details

Mailing Address

Contact Information

Contacts

Household

Notes

Applications

Jobs

Intake Appointments

Related

CSD Change Requests

Files

Edit Customer

HOLSCHTEIN, DOENA - CustomerID#: 110385

Customer Details

Name:

DOENA

T

HOLSCHTEIN

First Name

MI

Last Name

Social Security Number:

765-43-2108

Date of Birth:

12/31/1950

Ethnicity:

Primary Ethnicity

Ethnicity Subcategory

Mailing Address

Click **Add CSD Change Request**.

CSD Customer Change Requests

Add CSD Change Request


Refresh List

Export List



Exit

CSD Change Requests for Customer - DOENA HOLSCHTEIN

Request Date	Field	Old Value	New Value	Printed Date	Completed Date	Completed By	Note
No data to display							

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

Request Date	Field	Old Value	New Value	Printed Date	Completed Date	Completed By	Note
Request Date:		4/2/2019		Field:*	Date of Birth		
Old Value:*		12/31/1950		New Value:*	12/30/1950		
Completed Date:				Completed By:			
Note:	DATA ENTRY ERROR						



REMINDER

Completed Date and Completed By are logged **AFTER** the request is approved by CSD.


ENTRY FIELDS	DESCRIPTION
Request Date	Date the request is made
Field*	Select: ① First Name, ② Middle Initial, ③ Last Name, ④ SSN, OR ⑤ Date of Birth
Old Value*	Incorrect field information
New Value*	Correct field information
Printed Date*	Date the request is marked as printed
Completed Date	Date the request is processed and fulfilled
Completed By	CSD Employee that processed the request
Notes	Reason for the change request

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

All saved change requests will appear under requests section.

CSD Customer Change Requests								
+ Add CSD Change Request Refresh List Export List Exit								
CSD Change Requests for Customer - DOENA HOLSCHEIN								
	Request Date	Field	Old Value	New Value	Printed Date	Completed Date	Completed By	Note
 	4/2/2019	Date of Birth	12/31/1950	12/30/1950				DATA ENTRY ERROR

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.

 CSD Data Change Requests

Report Parameters

Start Date:* 11/1/2019

End Date:* 11/1/2019

Printed?: ☐

Agency Phone Number:* (831) 999-9999

Submit

CSD CHANGE REQUEST REPORT

Reports

↓

Daily Reports

1 of 1

75%

FAX TO: CSD HELP DESK

FROM: 60000 - TEST AGENCY RI

Phone: (831) 999-9999

Fax: (666) 666-6666

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CSD Data Change Request

For Customer SSN 665-65-6565



Field	Old Value	Correct Value	Req Note
DATE OF BIRTH	12/31/1950	12/30/1950	DATA ENTRY ERROR

Correction Complete Date: _____ by: _____ (CSD) Application Marked for Entry by: _____



After CSD Confirmation

After receiving confirmation from CSD of the complete request:

Click the  icon on the Change Request to edit.

CSD Customer Change Requests								
+ Add CSD Change Request Refresh List Export List Exit								
CSD Change Requests for Customer - DOENA HOLSCHTEIN								
	Request Date	Field	Old Value	New Value	Printed Date	Completed Date	Completed By	Note
 	4/2/2019	Date of Birth	12/31/1950	12/30/1950				DATA ENTRY ERROR

Fill out the *Complete Date* and the *Complete By* fields.

	Request Date	Field	Old Value	New Value	Printed Date	Completed Date	Completed By	Note
	4/2/2019	Date of Birth	12/31/1950	12/30/1950				DATA ENTRY ERROR
Request Date:	<input type="text" value="4/2/2019"/>	Field:*	<input type="text" value="Date of Birth"/>					
Old Value:*	<input type="text" value="12/31/1950"/>	New Value:*	<input type="text" value="12/30/1950"/>					
Completed Date:	<input type="text" value="4/3/2019"/>	Completed By:	<input type="text" value="CSD EMPLOYEE #1"/>					
Note:	<input type="text" value="DATA ENTRY ERROR"/>							
 								

Click  to save.