

We hope you and your loved ones are in good health during these unprecedented times. It is a difficult period for all of us as we try to keep our operations afloat while tending to matters at home.

To make things a little easier, we decided to record this webinar and condense the content so you may review it at your convenience. If you have any questions, please don't hesitate to contact us at Support@ServTraq.com.



Billing Partially Completed Jobs



April 16, 2020

Background

- CPA-E-20-01 allows LSPs to be reimbursed for partially completed jobs.
- ServTraq recommends using the **LAST MEASURE INSTALL DATE** as the job completed date indicator to report partially completed jobs for reimbursement.

Why use the Last Measure Install Date?

- Jobs may appear out of certification if the CURRENT date is used as the Completed Date.
- Using the **Last Measure Installed Date**, as the **Completed Date**, asserts the job was within eligibility certification at the time the last measure was installed.

Step 1: Review the Jobs Not Completed, Activity Entered Report

- The Jobs Not Completed, Activity Report, shows a summary list of incomplete jobs with measures entered.

Jobs Not Completed, Activity Entered

Report Parameters

Site: * -- ALL SITES --
-- ALL SITES --
SAN FRANCISCO
SAN JOSE
WATSONVILLE

Whole Page

Jobs Not Completed Activity Entered


831 CONSERVE 2019

List Name / Address

DwellingID	JobID	Assessed	Completed	Labor	Sub.	F
BUILDING CONSTRUCTION, WILLIAM HURT 170 IRIS WAY EAST PALO ALTO 94303						
47332	53921			\$215.44	\$0.00	
CONSTRUCTION, CNR 3853 DECOTO RD BLDG 5 UNITS 15/16 FREMONT 94538						
43646	48213			\$929.71	\$0.00	
CONSTRUCTION, CNR 3853 DECOTO RD BLDG 2 FREMONT 94538						
43701	48290			\$711.40	\$0.00	
CONSTRUCTION, CNR 3853 DECOTO RD BLDG 3 FREMONT 94538						
43702	48291			\$265.66	\$0.00	
CONSTRUCTION, HILL POINT 734 BRIARWOOD WAY CAMPBELL 95008						
47014	53438			\$412.26	\$0.00	

Step 2: Open the Job listed on Report

- From the Dwelling/Job Search page, enter the Job ID number.

 Dwelling/Job Search

Search Parameters

POS Address:

Street #

Street Name

Unit Number

POS Zip/City:

Zip Code

City

Name:

First Name

Last Name

Social Security Number:

-

-

-

Home Phone:

Phone Number

Permit Number:

Reverse Lookup:

47869

DwellingID

Submit

Clear

+ New Dwelling

+ New Job

Edit Job


Refresh

Export

Search Results

Dwelling ID	Job ID	Completed Date	Closed Date	Job Type
43344	47869			INITIAL WEATHERIZATION

Step 3: Switch Funding Source


Edit Measure
UNIT ASSESSMENT WITHOUT ATTIC

Measure Data

Subprogram*:
LIHEAP WX 2020

Measure*:
UNIT ASSESSMENT WITHOUT ATTIC

Hourly Rate:
\$0.00

Maximum Quantity:
1

Fixed Fee\$:
\$0.00

Maximum Amount:
\$0.00

Reimbursement Details

Install Date*:
4/22/2019

Labor Hours*:
1.1666

Measure Count*:
1

Crew Labor*:
\$47.23

Materials Amount*:
\$0.00

Subcontractor Amount*:
\$0.00

ASSESSMENTS

Add/Edit Crew Labor

Add/Edit Materials

- You may need to switch eligible LIHEAP 2019 measures to LIHEAP 2020 based on your agency's program funding remaining.

Step 4: Review Measure List

- Review the Measure list to identify the measure install date.

- Alternatively, you can also review the Jobsheet.

Installed Measures

[+ Add Measure](#)
[Edit Measure](#)
[Delete Measure](#)
[Refresh List](#)
[Export List](#)

Installed Measures for JobID - 47869, Customer - ALEKSANDR KAUSHANSKIY, Address - 133 SHIPLEY ST APT E1013, SAN FRANCISCO, 94107

Measure	Subprogram	Line Total	Install Date
UNIT ASSESSMENT WITHOUT ATTIC	LIHEAP WX 2020	\$47.23	4/22/2019
HISTORIC PRESERVATION REVIEW COSTS	LIHEAP WX 2020	\$0.00	11/19/2018

[Delete](#)
[Refresh](#)
[Link](#)
[Unlink](#)
[Jobsheet Details](#)
[Clone Job](#)
[Mark Covid-19 Partial](#)

[Edit Job](#)

JobID - 47869, 133 SHIPLEY ST APT E1013, SAN FRANCISCO, 94107

ServTraq - Reports - Jobsheet Details - Google Chrome

servtraqazure.com/ReportViewerPopup?ReportName=JobsheetDetails&JobID=47869

1 of 1

110%

Jobsheet Details

Customer Name: ALEKSANDR KAUSHANSKIY Job Type: ASSESS/DIAGNOS

Service Address: 133 SHIPLEY ST APT E1013 SAN FRANCISCO 94107

Completed Date: 4/22/2019 Reported Date: ApplicationID: 310232

DwellingID: 43344 JobID: 47869 Job Control Code: 310232

Subprogram: LIHEAP WX 2020

Measure	Install Date	Meas Value	Meas Count	Hours	Crew Labor	Materials	Sub Amt	Fees	Line
HISTORIC PRESERVATION REVIEW COSTS	11/19/2018	\$0.00	1	.00	\$0.00	\$0.00	\$0.00	\$0.00	
UNIT ASSESSMENT WITHOUT ATTIC	4/22/2019	\$0.00	1	1.17	\$47.23	\$0.00	\$0.00	\$0.00	

Step 5: Enter the Completed Date

- Enter the last measure install date as the Completed Date

Eligibility Details

Customer: [ALEKSANDR KAUSHANSKIY](#)
Eligibility: [View/Edit Eligibility Record](#)

Dwelling Assessment Items

Assessment Date: 4/22/2019	Cooking Oper. Status: OPERATIONAL
Dwelling Year Built: 1973	Heater Type: OTHER
HUD Funded?: <input type="checkbox"/>	Heating Energy: NATURAL GAS
Lead-Safe WX Req'd?: <input checked="" type="checkbox"/>	Heater Oper. Status: OPERATIONAL
# Attached Units: 128	Water Heater Type: HEAT PUMP
CEC Climate Zone: 3	Water Heating Energy: NATURAL GAS
Tenancy: RENTED	Water Heater Oper. Status: OPERATIONAL
Building Structure: STUCCO	Cooling Type: NONE
Cooking Appliance Type: RANGE	Cooling Oper. Status: NOT AVAILABLE
Cooking Energy: ELECTRIC	


Job Details

Job Tags:	
JobID: 47869	HPO Required?: <input checked="" type="checkbox"/>
Agency Control Code:	HPO Approval Number: 106217
Job Type: INITIAL WEATHERIZATION	Eligibility Type: NORMAL
Completed Date:	Site: SAN FRANCISCO
Reported Date:	Job Close Date:
Crew Leader: MICHAEL F DE GUZMAN	Job Close Reason:
Assessor: JAMES O MADRIAGA	Job Close Note:

Step 6: Mark Job as “COVID-19 Partial”

- At the top of the Job, select “Mark Covid-19 Partial”

Delete
Refresh
Link
Unlink
Jobsheet Details
Clone Job
Mark Covid-19 Partial



Edit Job
JobID - 36557, 1001 MAIN ST APT 4B, SALINAS, 93906

Eligibility Details

Customer: [NORMA PALOMO](#)
Eligibility: [View/Edit Eligibility Record](#)

Dwelling Assessment Items

Assessment Date:	<input type="text" value="5/15/2019"/>	Cooking Oper. Status:	<input type="text" value="OPERATIONAL"/>
Dwelling Year Built:	<input type="text" value="2005"/>	Heater Type:	<input type="text" value="EXTERIOR WALL DIRECT VENT"/>
HUD Funded?:	<input type="checkbox"/>	Heating Energy:	<input type="text" value="NATURAL GAS"/>
Lead-Safe WX Req'd?:	<input type="checkbox"/>	Heater Oper. Status:	<input type="text" value="OPERATIONAL"/>
# Attached Units:	<input type="text" value="1"/>	Water Heater Type:	<input type="text" value="CONVENTIONAL"/>

Step 6: Mark Job as “COVID-19 Partial” (cont.)

- *HCS Jobs do not require this work around!*
- *Re-weatherization Jobs without an Assessment measure should be reported normally as well.*

Delete
Refresh
Link
Unlink
Jobsheet Details
Clone Job
Mark Covid-19 Partial

Edit Job
JobID - 36557, 1001 MAIN ST APT 4B, SALINAS, 93906

Eligibility Details

Customer: NORMA PALOMO
 Eligibility: [View/Edit Eligibility Record](#)


Dwelling Assessment Items

Assessment Date: 5/15/2019	Cooking Oper. Status: OPERATIONAL
Dwelling Year Built: 2005	Heater Type: EXTERIOR WALL DIRECT VENT
HUD Funded?: <input type="checkbox"/>	Heating Energy: NATURAL GAS
Lead-Safe WX Req'd?: <input type="checkbox"/>	Heater Oper. Status: OPERATIONAL
# Attached Units: 1	Water Heater Type: CONVENTIONAL

Step 6: Mark Job as “COVID-19 Partial” (cont.)

1. This will change the Job Type to “Assessment and Diagnostics Only”.

Delete
Refresh
Link
Unlink
Jobsheet Details
Clone Job
Mark Covid-19 Partial


Edit Job
JobID - 36557, 1001 MAIN ST APT 4B, SALINAS, 93906

Eligibility Details

Customer: [NORMA PALOMO](#)
Eligibility: [View/Edit Eligibility Record](#)


Dwelling Assessment Items

Assessment Date:	<input type="text" value="5/15/2019"/>	Cooking Oper. Status:	<input type="text" value="OPERATIONAL"/>
Dwelling Year Built:	<input type="text" value="2005"/>	Heater Type:	<input type="text" value="EXTERIOR WALL DIRECT VENT"/>
HUD Funded?:	<input type="checkbox"/>	Heating Energy:	<input type="text" value="NATURAL GAS"/>
Lead-Safe WX Req'd?:	<input type="checkbox"/>	Heater Oper. Status:	<input type="text" value="OPERATIONAL"/>
# Attached Units:	<input type="text" value="1"/>	Water Heater Type:	<input type="text" value="CONVENTIONAL"/>

Step 6: Mark Job as “COVID-19 Partial”

(cont.)

2. A “Covid-19 Partial” waiver code will be added to the Assessment measure (if it exists).



Edit Measure
DUCT REPAIR AND REPLACEMENT

Measure Data

Subprogram*: LIHEAP WX 2019

Measure*: DUCT REPAIR AND REPLACEMENT

Hourly Rate: \$0.00

Maximum Quantity: 1

Fixed Fee\$: \$0.00

Maximum Amount: \$2,727.00

Reimbursement Details

Install Date*: 5/16/2019

Labor Hours*: 2.0000

Measure Count*: 1

Crew Labor*: \$50.00

Add/Edit Crew Labor

Materials Amount*: \$200.00

Add/Edit Materials

Subcontractor Amount*: \$0.00

Other Costs*: \$0.00

Fees*: \$0.00

Rebate Amount*: \$0.00

Line Total*: \$250.00

Other Information

Non-Feasible Code:

Justification Code:

Waiver Code: COVID-19 PARTIAL

Step 6: Mark Job as “COVID-19 Partial” (cont.)

3. A “Covid-19 Partial” tag will be added to the job for internal tracking.

Job Details

Job Tags: Covid-19 Partial ✕

JobID: 36557

HPO Required?: ☐

Agency Control Code:

HPO Approval Number:

Job Type: ASSESS/DIAGNOSTIC ONLY ▼

Eligibility Type: NORMAL ▼

Completed Date: 10/23/2019 ▼

Site: CENTRAL COAST ENERGY SERVICES ▼

Reported Date: ▼

Job Close Date: ▼

Crew Leader: ▼


Job Close Reason: ▼

Assessor: ▼

Job Close Note:

Step 7: Clone the Job

Delete
Refresh
Link
Unlink
Jobsheet Details
Clone Job


Edit Job
JobID - 53115, 649 ALMOND DR, WATSONVILLE, 95076

Eligibility Details

Customer: [HECTOR QUINTERO](#)
 Eligibility: [View/Edit Eligibility Record](#)


Dwelling Assessment Items

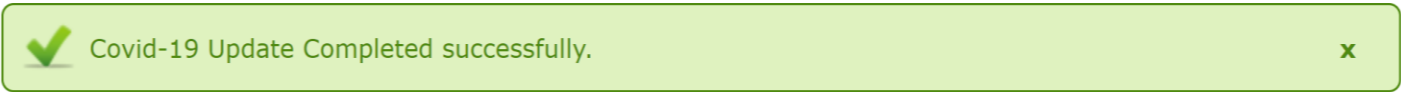
Assessment Date:	<input type="text" value="8/3/2019"/>	Cooking Oper. Status:	<input type="text" value="OPERATION"/>
Dwelling Year Built:	<input type="text" value="1975"/>	Heater Type:	<input type="text" value="FORCED AI"/>

- Clone the job to create a NEW job using the same customer information, eligibility information and assessment information.
- Future work completed on the unit, would be billed under the new job ID


Step 8: Report the Job(s)


- When ready to report the job(s) to eCORE, enter the *Reported Date* (5/15/20) and click “**Mark Reported**”
- Do NOT click “**eCore Database Transfer**” until you’ve reviewed the CSD Monthly Report.



Job Reporting



End Date:
Reported Date: 5/15/2020


Mark Reported


eCORE Database Transfer



Mark Covid-19 Partial

		Program	Job Control Code	Job ID	Dwelling ID	Job Type	Completed Date	Customer Na
<input checked="" type="checkbox"/>	!	LIHEAP WX 2015		36403	27421	INITIAL WEATHERIZATION	1/28/2015	RIPPER, JACK
<input checked="" type="checkbox"/>	!	LIHEAP WX 2019		36557	28507	ASSESS/DIAGNOSTIC ONLY	10/23/2019	PALOMO, NO
<input checked="" type="checkbox"/>	!	LIWP WX 2015		36403	27421	INITIAL WEATHERIZATION	1/28/2015	RIPPER, JACK
<input checked="" type="checkbox"/>	!	LIHEAP WX 2015		28022	20306	ASSESS/DIAGNOSTIC ONLY	3/30/2016	ROCHA, MAR
<input type="checkbox"/>	!	LIHEAP WX 2015		36455	28453	INITIAL WEATHERIZATION	9/12/2016	ROJAS, GLAD

Note: You can also checkmark job(s) as “**Covid-19 Partial**” in bulk if it’s more convenient. If you already marked the Job as Covid-19 Partial from the Job ID page, you don’t have to do it again.

Step 8: Report the Job(s) (cont.)

- Locate the **CSD Monthly Report** under *Reports* → *Weatherization Reports*
- Ensure the *Wx Program Activity Line* item is correct.
- This exact amount **MUST** be entered in EARS for your reports to reconcile.


CSD Monthly Report

Report Parameters

Reported Date:* 5/15/2020

Program:* 20B-2036 - LIHEAP WEATHERIZATION 2020

Site:* -- ALL SITES --

Submit

1 of 2

Whole Page

MONTHLY WEATHERIZATION REIMBURSEMENT/ACTIVITY REPORT -- LIHEAP WEATHERIZATION 2020

Contractor:	Contract Number:	Report Period:
TEST AGENCY R1	20B-2036	5/15/2020
130 - WX TRAINING AND TECHNICAL ASSISTANCE COSTS		
140 - WX PROGRAM COSTS DETAILS		
150 - WX PROGRAM ACTIVITIES COSTS		
1. Wx Program Activities	\$0.0000	
160 - OTHER PROGRAM COSTS		

Questions?

EMAIL US

Support@ServTraq.com

CALL US

(831) 761-1747

VISIT OUR SUPPORT PORTAL

Support.ServTraq.com

The Recorded Webinar and Written Guide are available here