

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

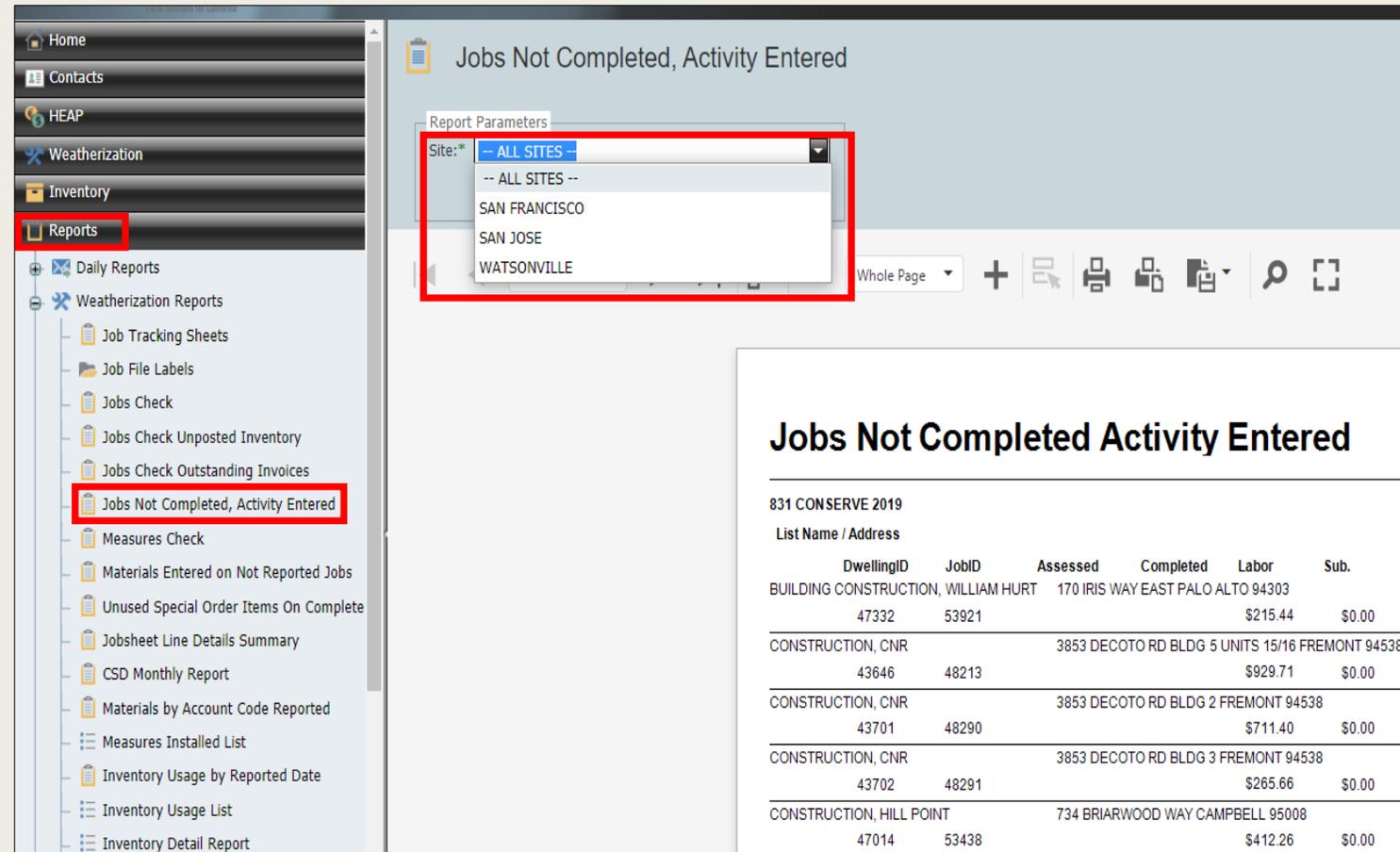
- CPA-E-20-01 allows LSPs to be reimbursed for partially completed jobs.
- ServTraq recommends using the **LAST MEASURE INSTALL DATE** as the job completed date indicator to report partially completed jobs for reimbursement.

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.
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:

POS Zip/City:

Name:

Social Security Number:

Home Phone:

Permit Number:

Reverse Lookup:

+ 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 ASSESSMENTS

Crew Labor*: \$47.23 Add/Edit Crew Labor

Materials Amount*: \$0.00 Add/Edit Materials

Subcontractor Amount*: \$0.00

- 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](#) | [X 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

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

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

- Enter the last measure install date as the Completed Date

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: <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.)

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

Fixed Fee\$: \$0.00

Maximum Quantity: 1

Maximum Amount: \$2,727.00

Reimbursement Details

Install Date*: 5/16/2019

Labor Hours*: 2.0000

Measure Count*: 1

Crew Labor*: \$50.00

Materials Amount*: \$200.00

Subcontractor Amount*: \$0.00

Other Costs*: \$0.00

Fees*: \$0.00

Rebate Amount*: \$0.00

Line Total*: \$250.00

[Add/Edit Crew Labor](#)

[Add/Edit Materials](#)

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

Agency Control Code:

Job Type: ASSESS/DIAGNOSTIC ONLY ▼

Completed Date: 10/23/2019 ▼

Reported Date: ▼

Crew Leader: ▼

Assessor: ▼

HPO Required?:

HPO Approval Number:

Eligibility Type: NORMAL ▼

Site: CENTRAL COAST ENERGY SERVICES ▼

Job Close Date: ▼

Job Close Reason: ▼

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

Covid-19 Update Completed successfully.

End Date: [] Reported Date: 5/15/2020 **Mark Reported** eCORE Database Transfer Mark Covid-19 Partial

<input type="checkbox"/>	Program	Job Control Code	Job ID	Dwelling ID	Job Type	Completed Date	Customer Name
<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:*

Program:*

Site:*

1 of 2
Whole Page

MONTHLY WEATHERIZATION REIMBURSEMENT/ACTIVITY REPORT -- LIHEAP WEATHERIZATION 2020

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

Questions?

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The Recorded Webinar and Written Guide are available here