3 How to Search and Add an Application

The Customer/Application Search feature can be used to search for a customer and/or an application from past program year. You can also use this section to enter a completed payment assistance application.

ICON KEY	
+	Add a new customer
+	Add a new HEAP application
	Open Application Wizard
	Add a special benefit to the customer's application
	Refresh the search results
	Export search results to PDF, Excel (XLS, XLSX, CSV), or Word (RTF) Format
	Apply search criteria
	Clear search criteria

Customer Search

Search for a customer using any or all of the fields listed in the table below. Enter as much information as available to help identify a customer, place of service address, or account number.

Click Submit to run the search. Click Clear to erase the fields.

ENTRY FIELDS	DESCRIPTION
Barcode	Barcode number of application
Name	① First Name + ② Last Name
Social Security Number	The customer's 9-digit SSN
Home Phone	Home phone number without a hyphen
Date of Birth	Customer's DOB in the following format: MM/DD/YYY
POS Address	① Street Number, ② Street Name/PO Box, ③ Unit Number
POS Zip/City	① Zip Code + ② City
Account Number	Energy account number
Second Account Number	Second energy account number
Reverse Lookup	Search by entering the Application ID

Search Results

Any records found are displayed under the Search Results.

Customer record not found? ➔ Click **New Customer** to create a new customer record. After the customer record has been created, it will appear in the search results.

To add an application for the customer, select the correct search result and click **New HEAP Application** OR **HEAP Application Wizard**.

Add an Application – Scroll Version

Clicking **New HEAP Application** will open up the "scroll version" of the application entry page. If the customer has a past application on file, the information will transfer to the new application entry page.

I.   Program/Payment/Intake

The **Program/Payment/Intake** section contains important fields that indicate the program the customer is applying to, the application status, the benefit amount they'll receive (if applicable), and the intake and certification dates. This information is important for assessing future applications and determining weatherization work.

ENTRY FIELDS	DESCRIPTION
Customer	Click the customer's NAME to make edits to the customer record
☐ **Phone duplicate in PY?**	Check ☑ if the phone number is a duplicate from another application within the same program year
Program*	① Year + ② Program Type
Application Status*	*Select*: ① Denied, ② Incomplete, ③ Eligible, OR ④ Pending
Denial Reason	*Select* applicable reason for denial
Payment*	① Base Payment, ② Supplemental Payment + ③ Total Payment
Priority Points	Priority points allocated to customer
Intake	① Intake Location, ② Intake Date* + ③ Certification Date*
Language*	The customer's preferred language
Monthly Energy Cost*	Customer's monthly cost of utilities
Energy Burden	Percentage based on customer's energy cost and income
Referral	① Referral Agency + ② Referral Staf

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

> **N O T E**
> Supplemental Payment is ONLY required for Fast Track applications.

II.   Mailing Address

The **Mailing Address** section defaults to either the address entered in a previous application OR the address entered in the Customer Record if a previous application does not exist.

ENTRY FIELDS	DESCRIPTION
Line 1	① Care of, ② Address Number, ③ Street Name/PO Box, ④ Street Type
Line 2	① Building Type + ② Unit Number
Line 3	① Zip Code, ② City, ③ County, ④ State
US Census Tract	Census Tract Number associated with the address
☐ Mailing Address is a duplicate for the program year	Check ☑ if the mailing address is a duplicate from an application within the same program year

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

III.   POS/Physical Address

The **POS/Physical Address** section defaults to either the address entered in a previous application <u>OR</u> the address entered in the Customer/Application search if a previous application does not exist.

> **NOTE**
>
> (!) **Save time and check ☑ the top box to auto-populate the POS Address with the Mailing Address.**

ENTRY FIELDS	DESCRIPTION
☐ Place of Service Address is the same as the mailing address	Check ☑ to automatically populate the following fields
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
US Census Tract	Census Tract Number associated with the address
☐ Place of Service Address is a duplicate for the program year	Check ☑ if the Place of Service address is a duplicate from an application within the same program year
☐ Has the customer lived at this Address for the past 12 months?	Check ☑ if the customer has lived at this address for the past 12 months

IV. Household

The **Household** section is where demographic information can be entered through two different options, depending on the agency type:

❶ Summary – Numbers per category

❷ Individual Household Members (CSBG Data)

❶ Summary – Numbers per category

The Summary entry captures a broad summary view of the household. This section includes two subsections: 1) *Summary Demographic Counts* and 2) *Agency Defined*.

Summary Demographic Counts

Select and fill out the following fields below.

Agency Defined

Check ☑ the first box if ONE or MORE household members are 70 years of age or older.

❷ Individual Household Members (CSBG Data)

The Individual Household Members entry captures specific demographic information of the household. This section includes three subsections: 1) *Household Information (CSBG),* 2) *Household Members*, and 3) *Agency Defined*.

Household Information (CSBG)

Select and fill out the following fields below.

ENTRY FIELDS	DESCRIPTION
Family Type	Select the family type of the customer's household
Tenancy	Select the customer's property tenancy
Other Income Type(s)	Select any applicable income sources
Non-Cash Benefits	Select any applicable assistance benefits

Household Members

Add an entry for every member of the household, as listed on the application. If the customer has a previous application <u>and</u> the application has every household member on file, click **Import Household Members** to transfer the information to the new application.

For manual entry, click **Add Household Member** and add the applicant and every household member listed on their application.

Agency Defined

Check ☑ the first box if ONE or MORE household members are 70 years of age or older. ServTraq will automatically calculate Agency Defined 2, 3 and 4, and Priority Offset.

V.   Energy Accounts – Electricity

The **Energy Accounts - Electricity** section is used to enter the customer's electric bill and account information.

1. **Select the customer's utility account to be transferred for payment.**
2. **Select ONE from the following options:**
    ① The customer has an electric utility account.
    ➔ Fill out the following fields below.

    ② The customer does **NOT** have an electric utility account.
    ➔ Move on to the Natural Gas account section.

Electric Account

The account listed in this section will be transferred for payment.

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ENTRY FIELDS	DESCRIPTION
Utility*	① Utility Service Provider + ② Utility Account Number
Utility Line 2	① Service Agreement ID + ② Consent to Share Data*
Bill Name	① First Name*, ② Middle Initial, ③ Last Name *
Bill Address*	Ɗ Street Address, ② Apartment/Suite/Unit/Building/Etc. Number, ③ City, ④ Zip Code, ⑤ State
Bill Costs*	Number of Billing Days, ② Supplied Energy Amount, ③ Energy Cost of Supplied Amount, ④ Total Energy Bill Amount
Pledge/CARE (RRP)	① Commitment/Pledge Date, ② Participant in RRP (Yes/No)*, ③ RRP Expiration Date, ④ Participant in Medical Baseline (Yes/No)*
☐ Is Electricity Shut Off?	Check ☑ if the customer's electricity is currently shut off
☐ Was Disconnected Electric Service Restored?	Check ☑ if the customer's electricity was turned back on after being disconnected
☐ Is there a Past Due Notice for this account?	Check ☑ if the customer received a Past Due/Shut Off Notice
☐ Are the Utilities All Electric?	Check ☑ if the customer has **ONLY** electric utilities

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

VI.   Energy Accounts – Natural Gas

The **Energy Accounts - Natural Gas** section is used to track a customer's natural gas bill and account information, if applicable.

Select ONE from the following options:

① The customer's Natural Gas Account is the **SAME** as their Electricity Account.
➔ The fields will automatically populate with the Electricity Account information.

② The customer's Natural Gas Account is **DIFFERENT** from their Electricity Account.
➔ Fill out the following fields below.

③ The customer does **NOT** have a Natural Gas Account.
➔ Move on to the next section.

Natural Gas Account

The account listed in this section will be transferred for payment.

ENTRY FIELDS	DESCRIPTION
Utility*	① Utility Service Provider + ② Utility Account Number
Utility Line 2	① Service Agreement ID + ② Consent to Share Data*
Bill Name	① First Name*, ② Middle Initial, ③ Last Name*
Bill Address*	Street Address, ② Apartment/Suite/Unit/Building/Etc. Number, ③ City, ④ Zip Code, ⑤ State

Bill Costs*	① Number of Billing Days, ② Supplied Energy Amount, ③ Energy Cost of Supplied Amount, ④ Total Energy Bill Amount
Pledge/CARE (RRP)	① Commitment/Pledge Date, ② Participant in RRP (Yes/No)*, ③ RRP Expiration Date, ④ Participant in Medical Baseline (Yes/No)*
☐ **Is Natural Gas Shut Off?**	Check ☑ if the customer's natural gas is currently shut off
☐ **Was Disconnected Natural Gas Service Restored?**	Check ☑ if the customer's natural gas was turned back on after being disconnected
☐ **Is there a Past Due Notice for this account?**	Check ☑ if the customer received a Past Due/Shut Off Notice

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

VII.   Energy Accounts – Wood/Propane/Oil

The **Energy Accounts - Wood/Propane/Oil** section is used to track a customer's wood/propane/oil bill and account information, if applicable.

Select ONE from the following options:

① The customer's Wood/Propane/Oil utility account.
➔ Fill out the following fields below.

② The customer does **NOT** have a Wood/Propane/Oil utility account.
➔ Move on to the Household Income section.

Wood/Propane/Oil Account

The account listed in this section will be transferred for payment.

ENTRY FIELDS	DESCRIPTION
Utility*	Select the Utility Type
Vendor/Account*	① Name of Vendor + ② Utility Account Number
Bill Name	① First Name*, ② Middle Initial, ③ Last Name*
Bill Address*	Street Address, ② Apartment/Suite/Unit/Building/Etc. Number, ③ City, ④ Zip Code, ⑤ State
Bill Costs*	Number of Billing Days, ② Supplied Energy Amount, ③ Energy Cost of Supplied Amount, ④ Total Energy Bill Amount
Days of Fuel Remaining?	Select the number of days remaining from current fuel levels
☐ Is the applicant currently out of fuel for this account?	Check ☑ if the customer has no remaining fuel

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

VIII.   Household Income

The **Household Income** section is where income can be entered through two different options:

❶ Summary – Enter Total Monthly Income for the Household

❷ Individual Household Member Income (CSBG Data)

> (!)
>
> **NOTE**
>
> **The type of entry selected in the Household Demographics section *(page 6)* determines the type of Income entry available for selection.**

SUMMARY entry selected in the Household Demographics section?
➔ ONLY Income Summary entry will be available in this selection.

INDIVIDUAL entry selected in the Household Demographics section?
➔ ONLY Individual Income entry will be available in this selection.

❶ Summary – Enter Total Monthly Income for the Household

The Summary entry captures a broad income summary view of the household.

Income Summary

Select the number of incoming-earning household members and calculate the total monthly income across all members.

❷ Individual Household Members (CSBG Data)

The Individual Household Members entry captures the income sources of every household member.

Income by Resident List
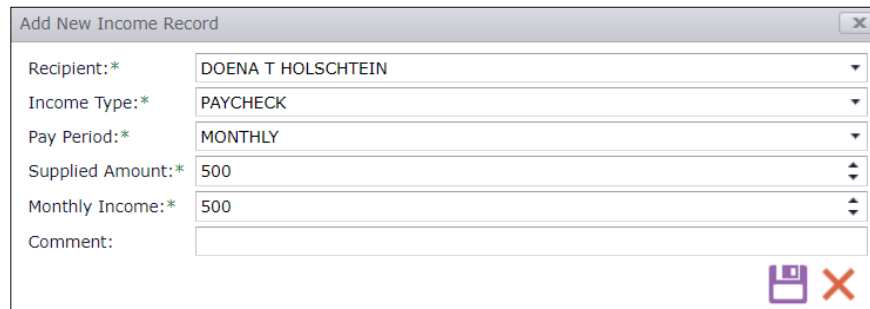
Add all appropriate income source(s) for each income-earning household member.

Click **Add** to add an Income Record for each income-earning household member.

ENTRY FIELDS	DESCRIPTION
Recipient*	Select the household member earning income
Income Type*	Select the source of income
Pay Period*	Select the reoccurring length of time the customer is paid
Supplied Amount*	The payment amount indicated on the income document
Monthly Income*	Monthly income generated
Comment	Additional comment regarding the customer's income

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

IX. Performance Measurements

The **Performance Measurements** section contains miscellaneous fields regarding the customer's household for reporting or analytic purposes.

ENTRY FIELDS	DESCRIPTION
Main Heating Fuel*	Select the household member earning income
Secondary Heating Fuel(s)*	Select the source of income
☐ Does a Member of Household Receive CalFresh	Check ☑ if a household member is a CalFresh recipient
☐ Was a WSAG/POW Submitted with the Application?	Check ☑ if the customer included a WX application with their UA application

Click **Save** to save the customer information entered in the sections above. Additional sections will generate within the customer's record after the initial sections are saved.

I C O N   K E Y

💾	Save the information entered on the application
💾	Save the information entered and close the application
➕	Add a Job to the Eligibility Record
🧙	Launch the Payment Assistance Application Wizard
⬅	Exit the application without saving
✖	Delete the application
🔄	Refresh the application
✔	Validate mailing and service address(es) against CSD's Database

Add an Application – Application Wizard

Click on **HEAP Application** Wizard to open up a "Step-by-Step" application entry window. If the customer has a past application on file, the information will transfer to the application wizard entry page.

	+ New Customer	+ New HEAP Application	HEAP Application Wizard	Edit Application	Add Special Benefit	Refresh	...
			Search Results				

Program	Application Status	Payment Amount	Intake Date	Transfer Date	Customer Name	SSN	Date of Birth	Phone Number	Ser
					DOENA HOLSCHTEIN	765-43-2108	12/31/1950	(831) 555-0101	

Step 1: Customer

The Customer Information section for the customer's personal and sensitive information, such as their SSN and date of birth, and their contact information. This section will default to the information as entered in the Customer Record.

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
Home Phone	Landline phone number

Message Phone	Phone number capable of receiving voice or SMS text 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. (*)

Step 2: Mailing Address

The Mailing Address section defaults to either the address entered in a previous application OR the address entered in the Customer Record if a previous application does not exist.

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.

Step 3: Physical Address

The **Physical Address** section defaults to either the address entered in a previous application OR the address entered in the Customer/Application search if a previous application does not exist.

Step 4: Household

The **Household** section is where demographic information can be entered through two different options, depending on the agency type:

❶ Summary – Numbers per category

❷ Individual Household Members (CSBG Data)

❶ Summary – Numbers per category

The Summary entry captures a broad summary view of the household. This section includes one subsection: *Household Demographics*.

❷ Individual Household Members (CSBG Data)

The Individual Household Members entry captures specific demographic information of the household. This section includes two subsections: 1) *Family Type/Housing* and 2) *Household Members List*.

Complete the following fields and add every household member, as listed on the application.

ENTRY FIELDS	DESCRIPTION
Family Type*	Select the family household type
Tenancy*	Select the customer's tenancy status
Other Income Type(s)*	Check ☑ the boxes applicable to the customer's other income sources
Non-Cash Benefits*	Check ☑ the boxes applicable to the customer's non-cash benefits

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

If the customer has a previous application <u>and</u> the application has every household member on file, click **Import Household Members** to transfer the information to this new application.

For manual entry, click **Add Household Member** and fill out the follow fields below. Click **Save** to add the member. Complete an entry for every household member.

Add New Household Member		☒
First Name:*	DOENA	
MI:	T	
Last Name:*	HOLSCHTEIN	
Date Of Birth:*	12/31/1950	▼
SSN:	765-43-2108	
Gender:*	FEMALE	▼
Race:*	MULTI-RACE	▼
Relation to Applicant:*	SELF	▼
Education Level:*	9-12/NON-GRADUATE	▼
Hispanic:*	☐	
Health Insurance:*	☐	
Health Insurance Type:		▼
Disabled:*	☐	
Limited English:*	☐	
Farmer:*	☐	
Migrant Farmworker:*	☐	
Seasonal Farmworker:*	☐	
Military Status:*	NEITHER ACTIVE MILITARY NOR VETERAN	▼
Work Status:*	EMPLOYED FULL-TIME	▼
Disconnected Youth:*	☐	

<u>Step 5</u>: Electricity

The **Energy Costs - Electricity** section is used to enter the customer's electric bill and account information.

1. **Select the customer's utility account to be transferred for payment.**

2. **Select ONE from the following options:**

    ① The customer has an electric utility account.
    ➔ Fill out the account information fields.

    ② The customer does **NOT** have an electric utility account.
    ➔ Move on to the Natural Gas account section.

ENTRY FIELDS	DESCRIPTION
Utility*	① Utility Service Provider + ② Utility Account Number
Utility Line 2	① Service Agreement ID + ② Consent to Share Data*
Bill Name	① First Name*, ② Middle Initial, ③ Last Name *
Bill Address*	Ⅾ Street Address, ② Apartment/Suite/Unit/Building/Etc. Number, ③ City, ④ Zip Code, ⑤ State
Bill Costs*	Number of Billing Days, ② Supplied Energy Amount, ③ Energy Cost of Supplied Amount, ④ Total Energy Bill Amount
Pledge/CARE (RRP)	① Commitment/Pledge Date, ② Participant in RRP (Yes/No)*, ③ RRP Expiration Date, ④ Participant in Medical Baseline (Yes/No)*

☐ **Is Electricity Shut Off?**	Check ☑ if the customer's electricity is currently shut off
☐ **Was Disconnected Electric Service Restored?**	Check ☑ if the customer's electricity was turned back on after being disconnected
☐ **Is there a Past Due Notice for this account?**	Check ☑ if the customer received a Past Due/Shut Off Notice
☐ **Are the Utilities All Electric?**	Check ☑ if the customer has **ONLY** electric utilities

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

Step 6: Natural Gas

The **Energy Costs - Natural Gas** section is used to track a customer's natural gas bill and account information, if applicable.

Select ONE from the following options:

① The customer's Natural Gas Account is the **SAME** as their Electricity Account.
→ The fields will automatically populate with the Electricity Account information.

② The customer's Natural Gas Account is **DIFFERENT** from their Electricity Account.
→ Fill out the account information.

③ The customer does **NOT** have a Natural Gas Account.
→ Move on to the next section.

ENTRY FIELDS	DESCRIPTION
Utility*	① Utility Service Provider + ② Utility Account Number
Utility Line 2	① Service Agreement ID + ② Consent to Share Data*
Bill Name	① First Name*, ② Middle Initial, ③ Last Name*
Bill Address*	Street Address, ② Apartment/Suite/Unit/Building/Etc. Number, ③ City, ④ Zip Code, ⑤ State
Bill Costs*	Number of Billing Days, ② Supplied Energy Amount, ③ Energy Cost of Supplied Amount, ④ Total Energy Bill Amount
Pledge/CARE (RRP)	① Commitment/Pledge Date, ② Participant in RRP (Yes/No)*, ③ RRP Expiration Date, ④ Participant in Medical Baseline (Yes/No)*
☐ Is Natural Gas Shut Off?	Check ☑ if the customer's natural gas is currently shut off
☐ Was Disconnected Natural Gas Service Restored?	Check ☑ if the customer's natural gas was turned back on after being disconnected
☐ Is there a Past Due Notice for this account?	Check ☑ if the customer received a Past Due/Shut Off Notice

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

Step 7: Wood/Propane/Oil

The **Energy Costs - Wood/Propane/Oil** section is used to track a customer's wood/propane/oil bill and account information, if applicable.

Select ONE from the following options:

① The customer's Wood/Propane/Oil utility account.
→ Fill out the account information fields.

② The customer does **NOT** have a Wood/Propane/Oil utility account.
→ Move on to the Household Income section.

ENTRY FIELDS	DESCRIPTION
Utility*	Select the Utility Type
Vendor/Account*	① Name of Vendor + ② Utility Account Number
Bill Name	① First Name*, ② Middle Initial, ③ Last Name*
Bill Address*	Street Address, ② Apartment/Suite/Unit/Building/Etc. Number, ③ City, ④ Zip Code, ⑤ State
Bill Costs*	Number of Billing Days, ② Supplied Energy Amount, ③ Energy Cost of Supplied Amount, ④ Total Energy Bill Amount
Days of Fuel Remaining?	Select the number of days remaining from current fuel levels
☐ Is the applicant currently out of fuel for this account?	Check ☑ if the customer has no remaining fuel

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

Step 8: Income

The **Household Income** section is where income can be entered through two different options:

❶ Summary – Enter Total Monthly Income for the Household

❷ Individual Household Member Income (CSBG Data)

> ⓘ **NOTE**
> **The type of entry selected in the Household Demographics section *(page 6)* determines the type of Income entry available for selection.**

SUMMARY entry selected in the Household Demographics section?

➔ ONLY <u>Income Summary</u> entry will be available in this selection.

<u>INDIVIDUAL</u> entry selected in the Household Demographics section?
➔ ONLY <u>Individual Income</u> entry will be available in this selection.

❶ Summary – Enter Total Monthly Income for the Household

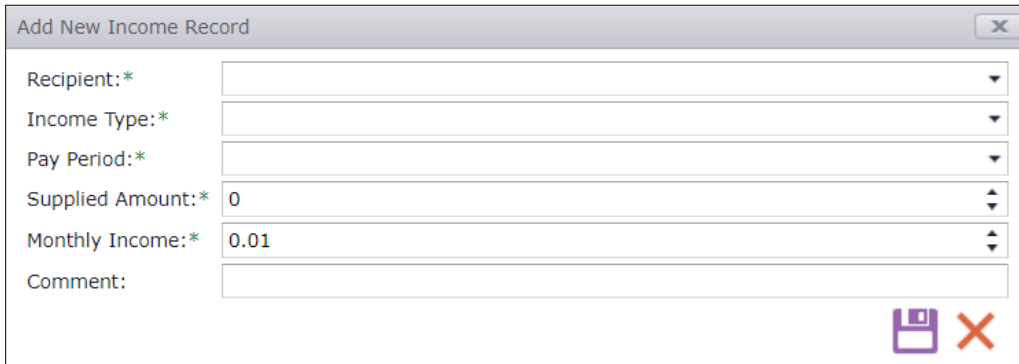The Summary entry captures a broad income summary view of the household.

❷ Individual Household Members (CSBG Data)

The Individual Household Members entry captures the income sources of every household member.

Click **Add** to add an Income Record for each income-earning household member.

ENTRY FIELDS	DESCRIPTION
Recipient*	Select the household member earning income
Income Type*	Select the source of income
Pay Period*	Select the reoccurring length of time the customer is paid
Supplied Amount*	The payment amount indicated on the income document
Monthly Income*	Monthly income generated
Comment	Additional comment regarding the customer's income

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

Step 9: Intake/Program

The **Program/Payment/Intake** section contains important fields that indicate the program, application status, benefit amount they'll receive (if applicable), and intake and certification dates. This information is important for assessing future applications and determining weatherization work.

After completing all the required steps, click **Submit** to save the new application.

If the information passed all validations, the application will be successfully saved, as shown below.