3.2 | Application Data Transfer

The Application Data Transfer feature displays a list of applications ready to be transferred to CORE for payment assistance. The column fields mirror the transfer template to allow easy review.

	ICON KEY	
✅	Selects all applications on the list
⊖	Unselects all applications
🌐	1) Download Excel file for manual import 2) Send selected applications via CORE Web Service
↪	Download previously transferred Excel file
↻	Refresh the search results
⬇	Export search results to PDF, Excel (XLS, XLSX, CSV), or Word (RTF) Format
🔍	Apply search criteria
🧹	Clear search criteria

NOTE

⚠ Review and make any necessary edits to the application and/or customer record **BEFORE** transferring to CORE.

Create Application Transfer File

ServTraq offers two ways to transfer records into CORE:

1. **Generate Transfer File** – records are exported to an Excel file and manually imported into CORE.
2. **Transfer through CORE Web Service** – records are transferred electronically and an application status is returned. (**CURRENTLY UNAVAILABLE**)

1. Generate Transfer File

This feature exports the applications into an Excel spreadsheet and generates a Transfer File. Users must log in to CORE to import the file, retrieve rejected records, and then manually log any rejection reasons into ServTraq.

To generate a transfer file, select the applications that are ready to be transferred. Individually select the applications OR click **Select All**.

☑ Select All	⊖ Select None	🔍 Generate Transfer File	🔍 Transfer Selected to CORE	↪ Regenerate Previous Transfer	⟳ Refresh List	⬇ Export List ▼	

	Account Number	Age 3 to 5	Age 6 to 18	Agency Code	Agency Control Code	Agency Defined 1	Ager
☑	42723305340	0	0	60000	119336	0	
☑	70430461163	1	1	60000	119337	0	
☑	16914599689	1	1	60000	119338	0	
☐	62889780425	0	0	60000	119339	0	
☐	NO ACCOUNT NUMBER	0	0	60000	119340	0	
☐	77428406977	0	0	60000	119341	0	
☐	02902505607	0	0	60000	119342	0	
☐	NO ACCOUNT NUMBER	1	1	60000	119343	0	
☐	NO ACCOUNT NUMBER	0	0	60000	119344	0	
☐	NO ACCOUNT NUMBER	0	0	60000	119345	0	
☐	NO ACCOUNT NUMBER	0	0	60000	119348	0	
☐	02902505607	0	0	60000	119350	0	
☐	NO ACCOUNT NUMBER	1	1	60000	119351	1	
☐	54874125874	0	1	60000	119352	0	

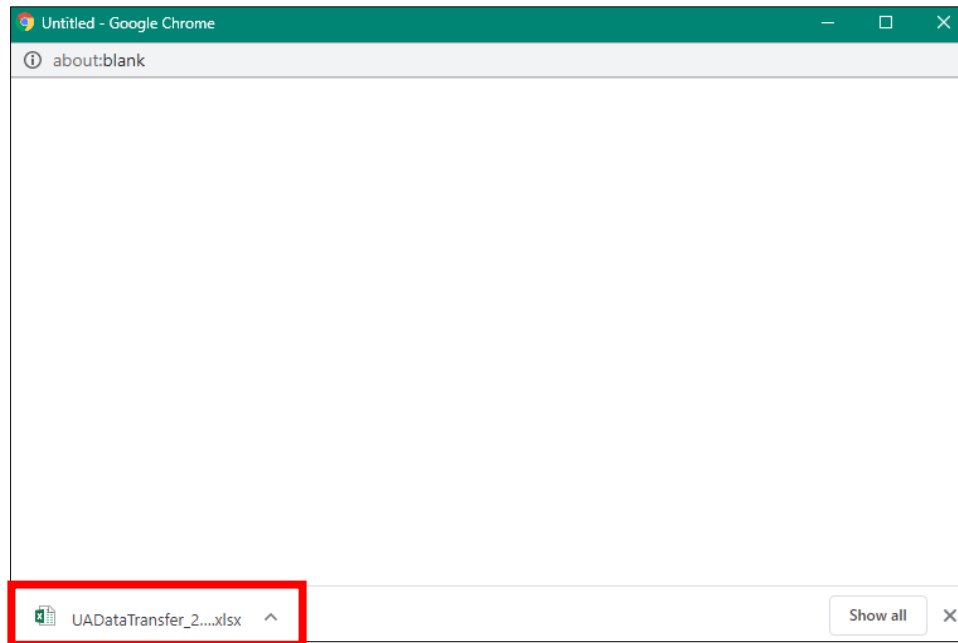After the applications are selected for transfer, click **Generate Transfer File**.

	Account Number	Age 3 to 5	Age 6 to 18	Agency Code	Agency Control Code	Agency Defined 1	Ager
☑	42723305340	0	0	60000	119336	0	
☑	70430461163	1	1	60000	119337	0	
☑	16914599689	1	1	60000	119338	0	
☐	62889780425	0	0	60000	119339	0	
☐	NO ACCOUNT NUMBER	0	0	60000	119340	0	
☐	77428406977	0	0	60000	119341	0	
☐	02902505607	0	0	60000	119342	0	
☐	NO ACCOUNT NUMBER	1	1	60000	119343	0	
☐	NO ACCOUNT NUMBER	0	0	60000	119344	0	
☐	NO ACCOUNT NUMBER	0	0	60000	119345	0	
☐	NO ACCOUNT NUMBER	0	0	60000	119348	0	
☐	02902505607	0	0	60000	119350	0	
☐	NO ACCOUNT NUMBER	1	1	60000	119351	1	
☐	54874125874	0	1	60000	119352	0	

A loading screen will appear.

Application Data Transfer

Select All | Select None | Generate Transfer File | Transfer Selected to CORE | Regenerate Previous Transfer | Refresh List | Export List ▼

	Account Number	Age 3 to 5	Age 6 to 18	Agency Code	Agency Control Code	Agency Defined 1	Ager
☑	42723305340	0	0	60000	119336	0	
☑	70430461163	1	1	60000	119337	0	
☑	16914599689	1	1	60000	119338	0	
☐	62889780425	0	0	60000	119339	0	
☐	NO ACCOUNT NUMBER				19340	0	
☐	77428406977				19341	0	
☐	02902505607	0	0	60000	119342	0	
☐	NO ACCOUNT NUMBER	1	1	60000	119343	0	
☐	NO ACCOUNT NUMBER	0	0	60000	119344	0	
☐	NO ACCOUNT NUMBER	0	0	60000	119345	0	
☐	NO ACCOUNT NUMBER	0	0	60000	119348	0	
☐	02902505607	0	0	60000	119350	0	
☐	NO ACCOUNT NUMBER	1	1	60000	119351	1	
☐	54874125874	0	1	60000	119352	0	

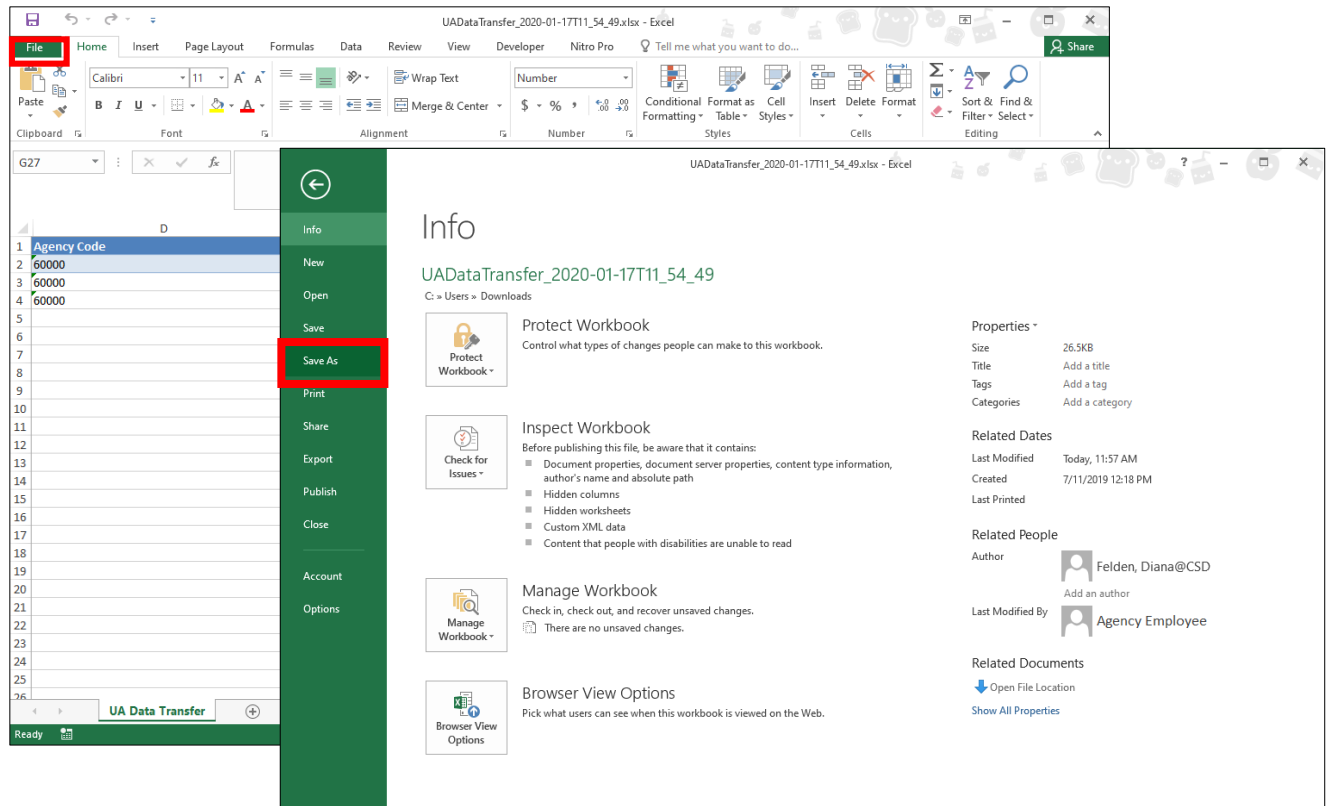Marking selected applications as benefitted and generating transfer file. Please wait...

An external window will pop up containing the Transfer File in Excel format located in the download bar at the bottom of the page.
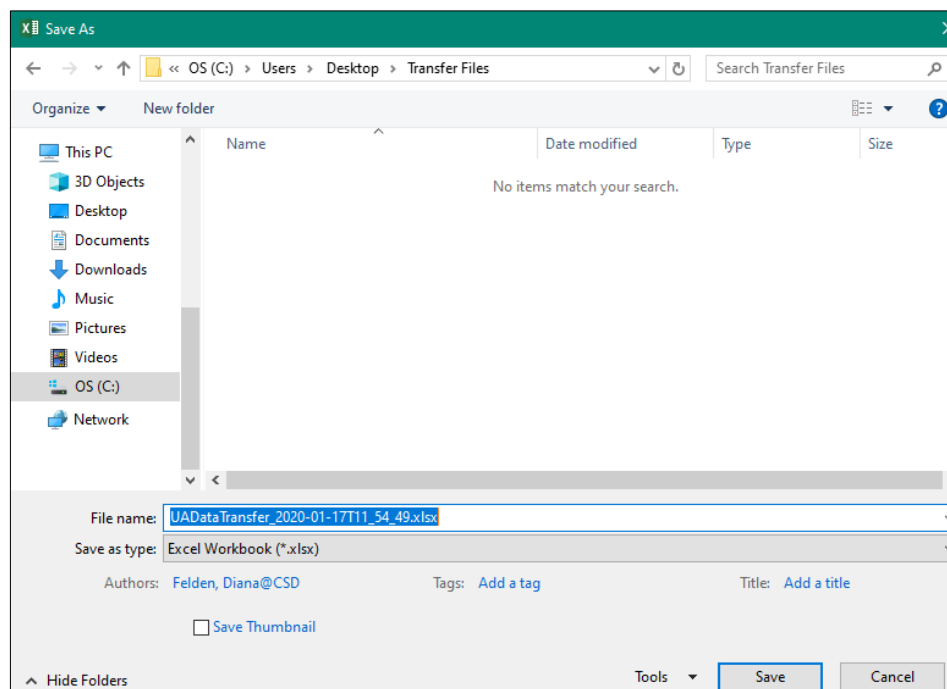

NOTE
DO <u>NOT</u> MAKE ANY CORRECTIONS, EDITS, OR MODIFICATIONS TO THE TRANSFER FILE!
IF THERE IS A MISTAKE IN THE TRANSFER FILE, RETURN TO SERVTRAQ. CORRECT THE MISTAKEN APPLICATION(S) AND REGENERATE THE TRANSFER FILE.

Review the Transfer File to ensure that the correct applications were selected. To save the file, click **File** > **Save As**.

Select the location to which the file will be saved, and click **Save** to finish.

2. Transfer through CORE Web Service

At this time, the CORE web service does **NOT** support direct application transfers from ServTraq.
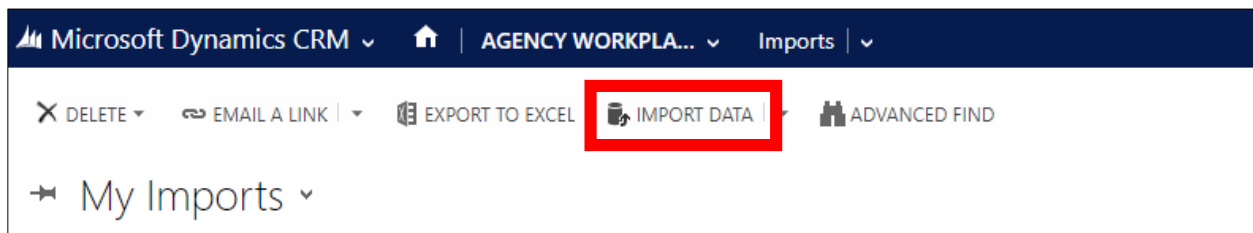
Import Transfer File to CORE

The Transfer File is now ready to be manually imported into CORE. Navigate to the CORE Database on your browser and sign in.
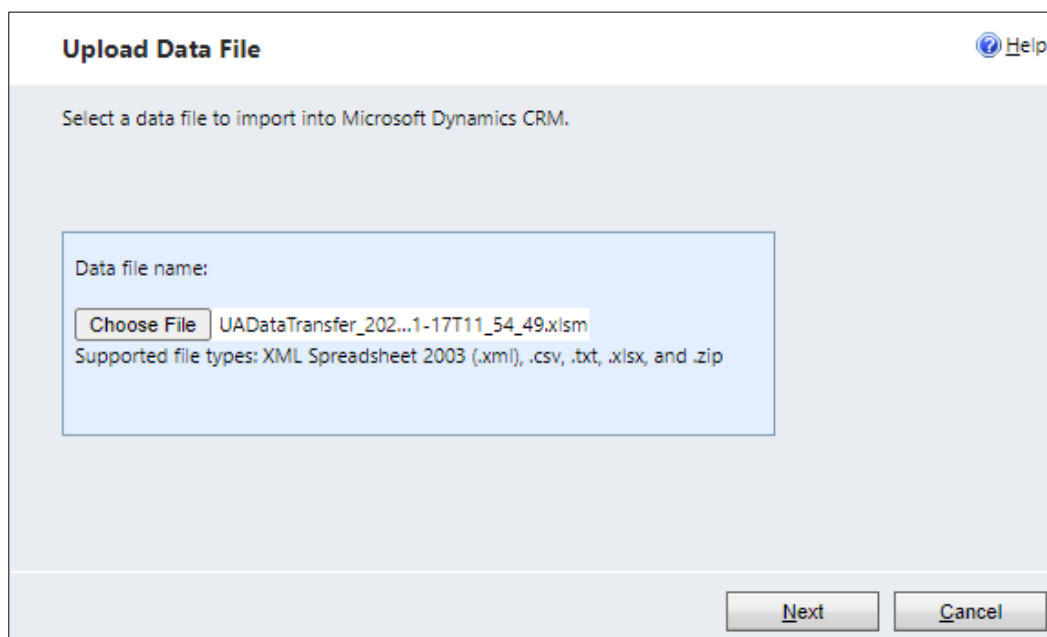
Hover over the **Agency Workplace** tab at the top and click on **Imports**.
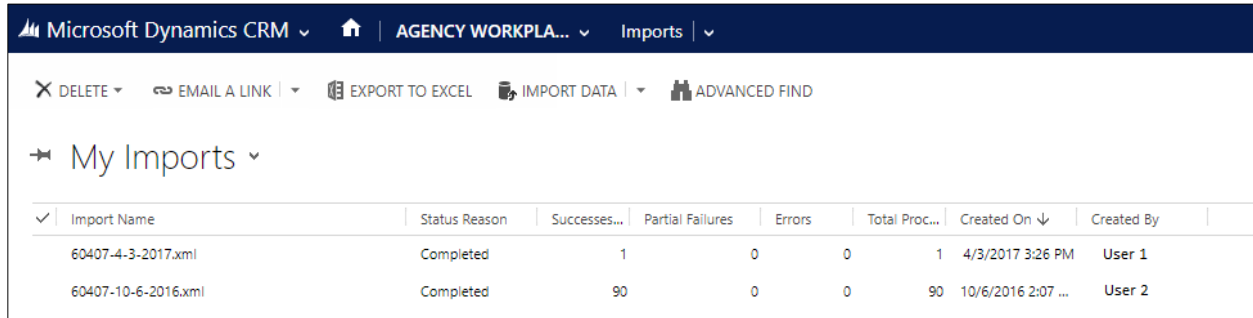

Click **Import Data**.

Click **Choose File** and search and select the Transfer File that was just generated. Click **Next** to continue.

The Transfer File will now appear within the **Imports** section.

See the CSD CORE User Manual learn more about imports and monitoring applications.