



CA LIHEAP Apply

California's **Online** LIHEAP Application System

December 18, 2020

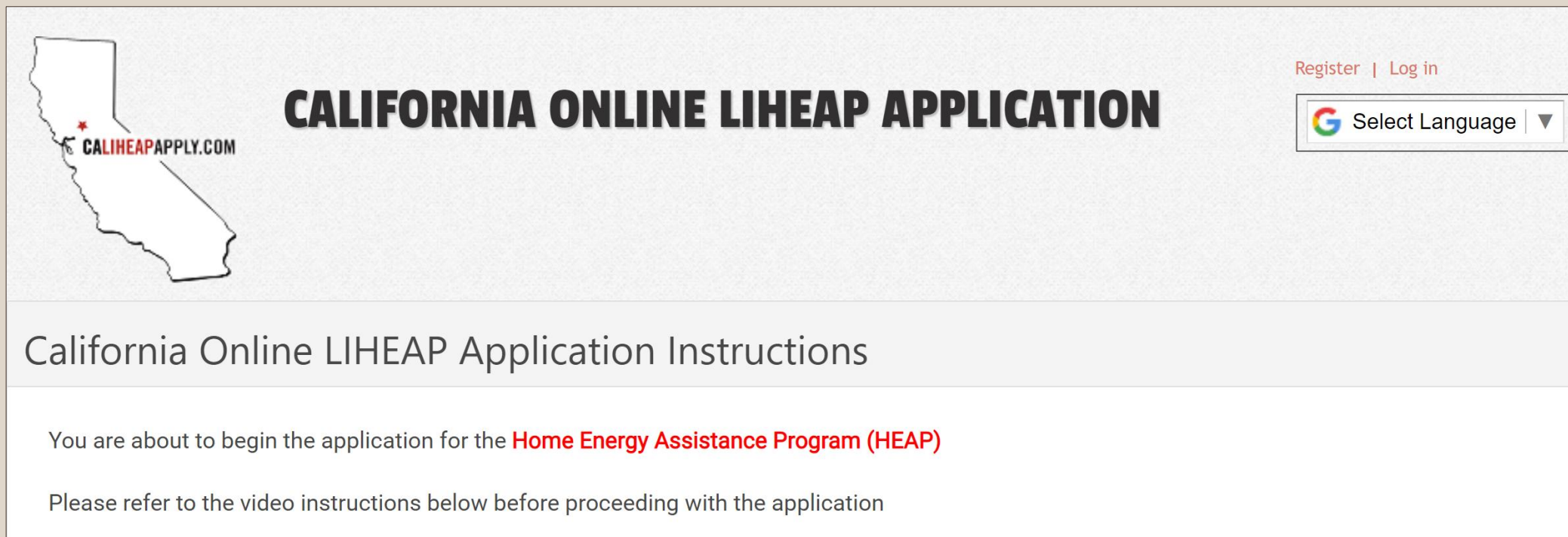
Today's Webinar

- General and agency-specific features
- How customers can submit an application
- How to process a submitted online application
 - Benefitted/Denied
 - Deficient/Incomplete
- Live demo
- Q&A session

Features

General Features

- Home page of **CALIHEAPApply.com**



The screenshot shows the home page of the CALIHEAPApply.com website. At the top left is a logo featuring a map of California with a red star and the text "CALIHEAPAPPLY.COM". To the right of the logo is the title "CALIFORNIA ONLINE LIHEAP APPLICATION" in large, bold, black letters. In the top right corner, there are links for "Register" and "Log in", and a language selection dropdown menu with the Google logo and the text "Select Language". Below the title, there is a section titled "California Online LIHEAP Application Instructions". The main content area contains two paragraphs: "You are about to begin the application for the **Home Energy Assistance Program (HEAP)**" and "Please refer to the video instructions below before proceeding with the application".

CALIFORNIA ONLINE LIHEAP APPLICATION

Register | Log in

Select Language ▼

California Online LIHEAP Application Instructions

You are about to begin the application for the **Home Energy Assistance Program (HEAP)**

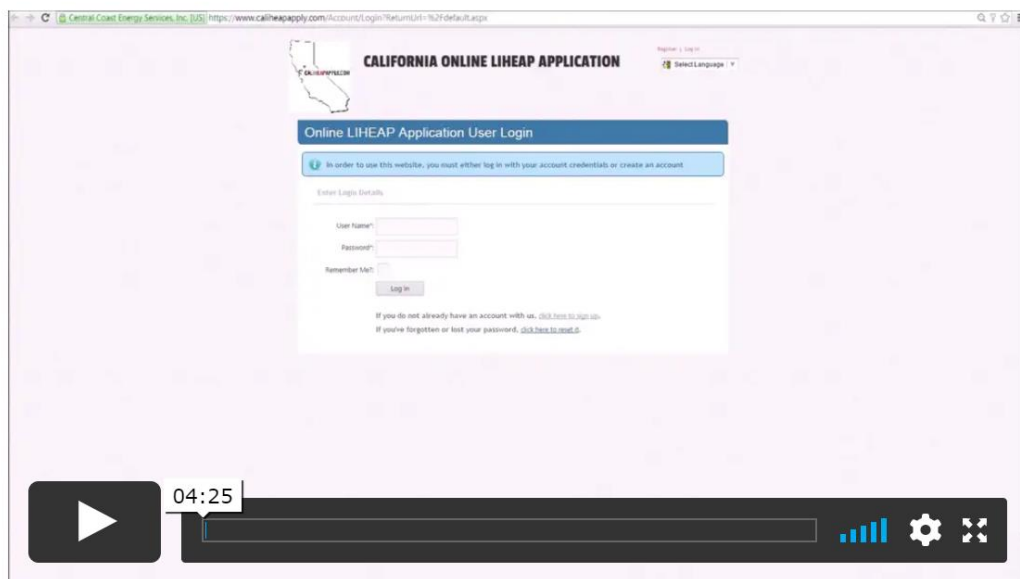
Please refer to the video instructions below before proceeding with the application

Over 100
different
languages

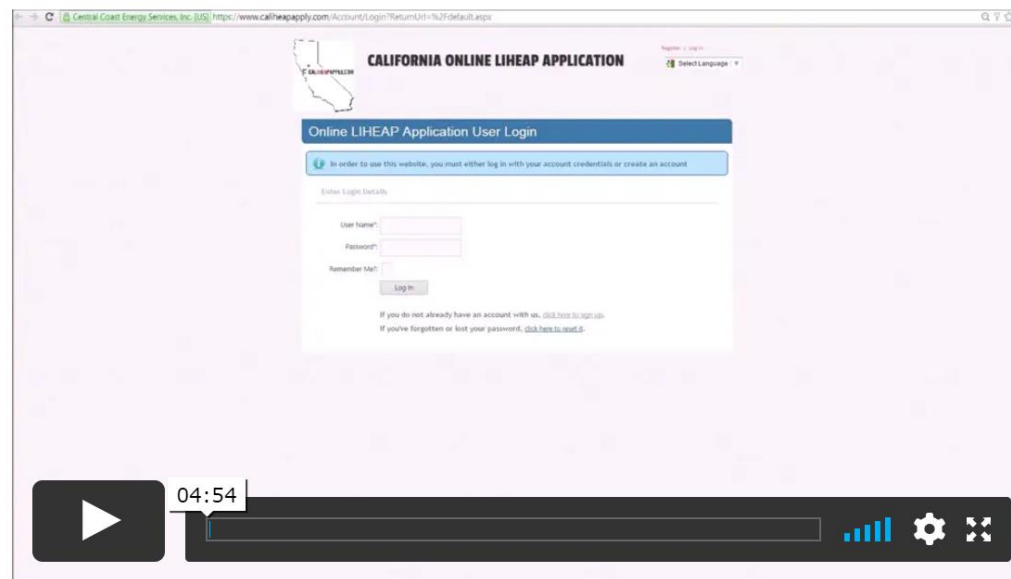
General Features

- Video tutorials in English and Spanish

English



Spanish



General Features

- List of required documents
- File requirements

Before you begin, please review our [privacy policy](#).

Make sure you have the following documents in a **PDF (scanned) file**:

If you do not have a scanner, you can download free one for a smartphone or tablet from the app store. Scan the required documents with your device and then email them to yourself for use on the application.

....> All pages of your most recent utility bill(s). If you have more than one energy provider, scan the bill for each provider.

....> Any Shut-off Notices you may have received

....> Income documents for the last 30 days for all adults in the household

....> Picture ID of person applying

If you do not submit the required documents in a PDF file - your application will NOT be processed. You will have to begin the application process all over again.

BEGIN APPLICATION

Agency-Specific Features

COMPANY
SERVICES
APPLYING FOR HELP
CONTACTS/LINKS

CCES
CENTRAL COAST ENERGY SERVICES ONLINE LIHEAP APPLICATION

California Online LIHEAP Application Instructions

You are about to begin the application for the **Home Energy Assistance Program (HEAP)**


Please refer to the video instructions below before proceeding with the application

English

04:25

1. Banner Customization
 - Agency name
 - Agency logo

Agency-Specific Features

Agency Application Forms						
ADD NEW FORM		<div>Search</div>				
Edit	Application Form Title ▾	Form Type ▾	Language ▾	Display Order ▾	Instructions ▾	Active ▾
	Energy Conservation Tips	Client Education	ENGLISH	1	Download these Energy Conservation Tips and learn simple ways you can save energy and money	<input checked="" type="checkbox"/>
<div> <input checked="" type="checkbox"/> ▾ [Active] Equals 'Checked' </div> <div>Clear</div>						

2. Customer forms

- Request additional documentation (before start of application)
- Provide educational material (after application submission)

Adding Forms

Online LIHEAP Application Admin Panel Submitted Applications User Administration Agency Forms Agency Settings

Add New Application Form

Save Save and Close Exit

APPLICATION FORM INFORMATION

Form Title*:

Instructions:

Form Download Url*:

This must be a fully qualified Url like https://www.example.com/myform.pdf

Form Type*: Required Application Upload

Language*: ENGLISH

Display Order*:

Name of Form

Public URL

Language of form

Explanation or directions for completion


Required or Client Education?

















Order on page

Agency-Specific Features

3. Email templates

- Modify language in status update emails
- Add additional agency information
- Available in English and Spanish

 Status Update Email Template Editor

Hello {FirstName} {LastName},

Your LIHEAP application's status was updated on {StatusDate} at {StatusTime}. You can [click this link](#) to go to your profile page and view the status of any submitted applications.

The status of the application you submitted on {ApplicationSubmittedDate} at {ApplicationSubmittedTime} is {ApplicationStatusDescription}.

You will receive a confirmation and more detailed status explanation by e mail or mail directly.

Do not reply to this email as the mailbox is unattended.

Thank you,
{EmailSignature}

DESIGN

HTML

SAVE TEMPLATE

PREVIEW RESULTS

Submitting an Application (Customer Side)

Application Start

- Need to scroll through video tutorials AND required documents
- Button at bottom of home page

Before you begin, please review our [privacy policy](#).

Make sure you have the following documents in a **PDF (scanned) file**:

If you do not have a scanner, you can download free one for a smartphone or tablet from the app store. Scan the required documents with your device and then email them to yourself for use on the application.

→ All pages of your most recent utility bill(s). If you have more than one energy provider, scan the bill for each provider.

→ Any Shut-off Notices you may have received

→ Income documents for the last 30 days for all adults in the household

→ Picture ID of person applying

If you do not submit the required documents in a PDF file - your application will NOT be processed. You will have to begin the application process all over again.

BEGIN APPLICATION



Existing Account? Log In!

Online LIHEAP Application User Login



In order to use this website, you must either log in with your account credentials or create an account

ENTER LOGIN DETAILS

User Name*:

Password*:

Remember Me?: ☐

LOG IN

If you do not already have an account with us [click here to sign up](#) .

If you've forgotten or lost your password, [click here to reset it](#) .

New Customer? New Account.

Account Registration

NAME AND ADDRESS

Name*: Last Name

Zip Code*:

City*:

County*:

AUTHORIZATION AND CONTACT INFORMATION

User Name*:



IMPORTANT! Make sure you enter an email address you can access. You will be required to confirm the address before you can use the site.

Email Address*:

Alternate Email:

Password*:




Password safety

Confirm Password*:

Email confirmation
required to
activate account!

Start New Application

[Home](#) [COMPANY](#) [SERVICES](#) [APPLYING FOR HELP](#) [CONTACTS/LINKS](#)


 **CENTRAL COAST ENERGY SERVICES ONLINE LIHEAP APPLICATION** Hello, JGTest ! | [Log off](#) Select Language ▼

Manage User Profile

START A NEW LIHEAP APPLICATION

USER PROFILE INFORMATION

Name*: JULIANA GARCIA

 **IMPORTANT!** Make sure you enter an email address you can access. If you change your email address, you will be required to confirm the address before you can continue to use the site.

Email Address*: Julie@ServTraq.com

Alternate Email:

Zip Code*: 95076 ▼

City*: WATSONVILLE ▼


County*: SANTA CRUZ ▼

UPDATE PROFILE

Customers can submit only **ONE** online application per calendar year

Start New Application (cont.)


- Download **ALL** required forms

 **CENTRAL COAST ENERGY SERVICES ONLINE LIHEAP APPLICATION** Hello, creejohnson ! | Log off Select Language ▼


Required Application Forms


Please download the forms below and fill them out **prior to beginning** the application process. In order for your application to be processed, all forms on this page must be filled out and uploaded.


Form: Sample Form Title Instructions: Follow up instructions Download	Form: Sample Form Title Instructions: Follow up instructions Download
Form: Sample Form Title Instructions: Follow up instructions Download	Form: Sample Form Title Instructions: Follow up instructions Download
Form: Sample Form Title Instructions: Follow up instructions Download	Form: Sample Form Title Instructions: Follow up instructions Download


 [CONTINUE TO THE LIHEAP ONLINE APPLICATION](#)


Customer Side – Step 1


 **APPLICANT INFORMATION**


 **APPLICANT ADDRESSES**


 **HOUSEHOLD INFORMATION**

 **HOUSEHOLD INCOME**

 **ENERGY ACCOUNTS**

 **UPLOAD DOCUMENTS**

 **APPLICATION SUMMARY**

 **Step 1: Applicant Information**

Applicant Details

Name:

First Name*MILast Name*

Social Security Number*:

Date of Birth*:

Primary Language*:

Applicant's Ethnicity:

Primary EthnicityEthnicity Subcategory

Contact Information

Home Phone:

Message Phone:

Mobile Phone:


Email Address:


What is the Best Time to Call You?:


NEXT >


pplication version: 2.155.24.0


Customer Side – Step 2


 APPLICANT INFORMATION


 APPLICANT ADDRESSES

 HOUSEHOLD INFORMATION

 HOUSEHOLD INCOME

 ENERGY ACCOUNTS

 UPLOAD DOCUMENTS

 APPLICATION SUMMARY

Step 2: Applicant Addresses - Mailing & Physical (Place of Service)

Mailing Address


Address Line 1*: PO BOX 2707

Address Line 2: Address Line 2

City/Zip Code*: WATSONVILLE 95076

County/State*: SANTA CRUZ CALIFORNIA

Physical Address - Where You Live

 If you wish to change your place of service zip code, city, or county you must edit it in your [profile](#).

☐ Physical Address the Same as Mailing Address

☐ Have You Lived at this Residence for the Past 12 Months?

Address Line 1*: 135 AVIATION WAY

Address Line 2: Address Line 2

City/Zip Code*: WATSONVILLE 95076








County/State*: SANTA CRUZ CALIFORNIA


< PREVIOUS

NEXT >

Application version: 2.155.24.0

Customer Side – Step 3

 **APPLICANT INFORMATION**
 **APPLICANT ADDRESSES**
 **HOUSEHOLD INFORMATION**
 **HOUSEHOLD INCOME**
 **ENERGY ACCOUNTS**
 **UPLOAD DOCUMENTS**
 **APPLICATION SUMMARY**

 **Step 3: People Living in Household**

Enter the Total Number of People Living in the Household

Household Size*: 2


Enter the Number of People Living in the Household who are


2 Years & Younger*: 1	Ages 3 to 5*: 0
Ages 6 to 18*: 0	Ages 19 to 59: 1
Age 60 or Older*: 0	Disabled*: 0
Native American*: 0	Farmworker*: 0
Limited English*: 0	


< PREVIOUS


NEXT >


Customer Side – Step 4


 APPLICANT INFORMATION


 APPLICANT ADDRESSES


 HOUSEHOLD INFORMATION

 **HOUSEHOLD INCOME**

 ENERGY ACCOUNTS

 UPLOAD DOCUMENTS

 APPLICATION SUMMARY

 Step 4: Household Income

Household Income Breakdown

Are you or someone in your household CURRENTLY receiving CalFresh (Food Stamps)?*

☐ Yes ☒ No

Enter the number of household members who receive income*

1

Enter total GROSS monthly income for all persons living in the household. You will need to upload copies of all income records for all adult household members on the documents page.

Wages*: \$1,000.00

Pensions*: \$0.00

TANF / Cal Works*: \$0.00

SSI / SSP*: \$0.00

SSA / SSDI*: \$0.00

Interest*: \$0.00

Other*: \$0.00

Total Income: \$1,000.00

< PREVIOUS

NEXT >

Customer Side – Step 5



APPLICANT INFORMATION



APPLICANT ADDRESSES



HOUSEHOLD INFORMATION



HOUSEHOLD INCOME



ENERGY ACCOUNTS



UPLOAD DOCUMENTS



APPLICATION SUMMARY



Step 5: Household Energy Information

Answer the Following Questions Concerning Your Household Energy

To which energy bill do you want the LIHEAP benefit to be applied?*

☐ Natural Gas ☒ Electricity ☐ Wood ☐ Propane ☐ Fuel Oil ☐ Kerosene

Utility to Pay*: PACIFIC GAS & ELECTRIC COMPANY

Account Number*: 12345678911

☐ Check here if your utilities are included in your rent or sub-metered.

What is the main fuel used to HEAT your home?*

☐ Natural Gas ☒ Electricity ☐ Wood ☐ Propane ☐ Fuel Oil ☐ Kerosene

In addition to your main heating source, do you ever use any of the following to heat your home (you can select more than one):

☒ Natural Gas ☐ Electricity ☐ Wood ☐ Propane ☐ Fuel Oil ☐ Kerosene





Check all that apply for each type of energy source for any home energy costs.


NOTE: The questions below are MANDATORY and require a response.


Required: Copies of all most recent energy bills and/or receipts must be uploaded in the Supporting Documentation step. A copy of an electric bill must be included.


Customer Side – Step 6


 APPLICANT INFORMATION


 APPLICANT ADDRESSES

 HOUSEHOLD INFORMATION

 HOUSEHOLD INCOME

 ENERGY ACCOUNTS


 **UPLOAD DOCUMENTS**

 APPLICATION SUMMARY

Step 6: Upload Supporting Documents

IMPORTANT!!
Please be sure to provide all of the following. Make sure all documents/pictures are clear, complete, and readable.

- Proof of Identification
- Income documents for the last 30 days for all adults in the household
- All pages of your most recent bills for any utilities for your household
- Any shut off notices you may have received

 Failure to provide documentation for all of these items will result in a delay in the processing of your application.

You can provide required supporting documentation by:

- Uploading pdf files using the upload dialog below
- Emailing pdf files as attachments to caliheapapply@zoho.com
- Scanning them using a local scanner or all-in-one

Make a selection below to enable your preferred method

Select a method to provide supporting documentation: ☒ Upload ☐ Email ☐ Scan

Upload Documents


Select Files:


Allowed file types: pdf
Maximum file size: 4Mb


Uploaded Documents

File Name

Customer Side – Step 7

 **APPLICANT INFORMATION**


 **APPLICANT ADDRESSES**

 **HOUSEHOLD INFORMATION**

 **HOUSEHOLD INCOME**

 **ENERGY ACCOUNTS**

 **UPLOAD DOCUMENTS**

 **APPLICATION SUMMARY**

Step 7: Application Summary



Please review the application preview below. If you wish to change any of the data on your application you can do so by clicking the appropriate section link on the left-hand menu. Once you have verified that all data on the application is correct, you can submit for processing by clicking the Finish button at the bottom of the page.



Page

1

of

2



PDF



Department of Community Services and Development

Energy Intake Form

CSD 43 (11/2015)

Agency:

Intake Initials:

Intake Date:

Official Use Only:

Priority Points

A.C.C.

Eligibility Cert Date

Job Control Code

First Name

NANCY

Middle Initial

Last Name

WEEEE

Date of Birth

MM/DD/YY

05/13/1988

Mailing Address

PO BOX 2707

Unit Number

Mailing City

WATSONVILLE

Mailing County

SANTA CRUZ

Mailing State

CA

Mailing Zip Code

95076

SERVICE ADDRESS – Address where applicant lives (this cannot be a P.O. Box)

Is your service address the same as mailing address?

☐ Yes

☒ No

Have you lived at this residence during each of the past 12 months

☐ Yes

☒ No

Service Address

135 AVIATION WAY

Unit Number

Service City

WATSONVILLE

Service County

SANTA CRUZ

Service State

CA

Service Zip Code

95076

Customer Side – Step 7 (cont.)

Are you or someone in your household CURRENTLY receiving CalFresh (Food Stamps)?

☐ Yes ☒ No

PLEASE CONFIRM YOU HAVE UPLOADED THE FOLLOWING REQUIRED DOCUMENTS.

- ➡ * ☐ All Income documents for all household members within the last 30 days
- ➡ * ☐ All Energy Documents for the last 30 days
- ➡ * ☐ Your Utility Shut Off Notice - if applicable
- ➡ * ☐ Your Photo ID

TO SUBMIT YOUR APPLICATION, CHECK THE 'I AGREE' BOX AND CLICK FINISH

* ☐ I Agree

By selecting "I Agree", you agree to the [terms of use](#).

Click [here](#) to view our privacy policy

FINISH

Customer Side – Step 8

- Download all educational materials (if applicable)

Client Education Forms



Congratulations! Your application has been successfully submitted. You can find below some helpful client education forms. Please download them and read at your convenience.

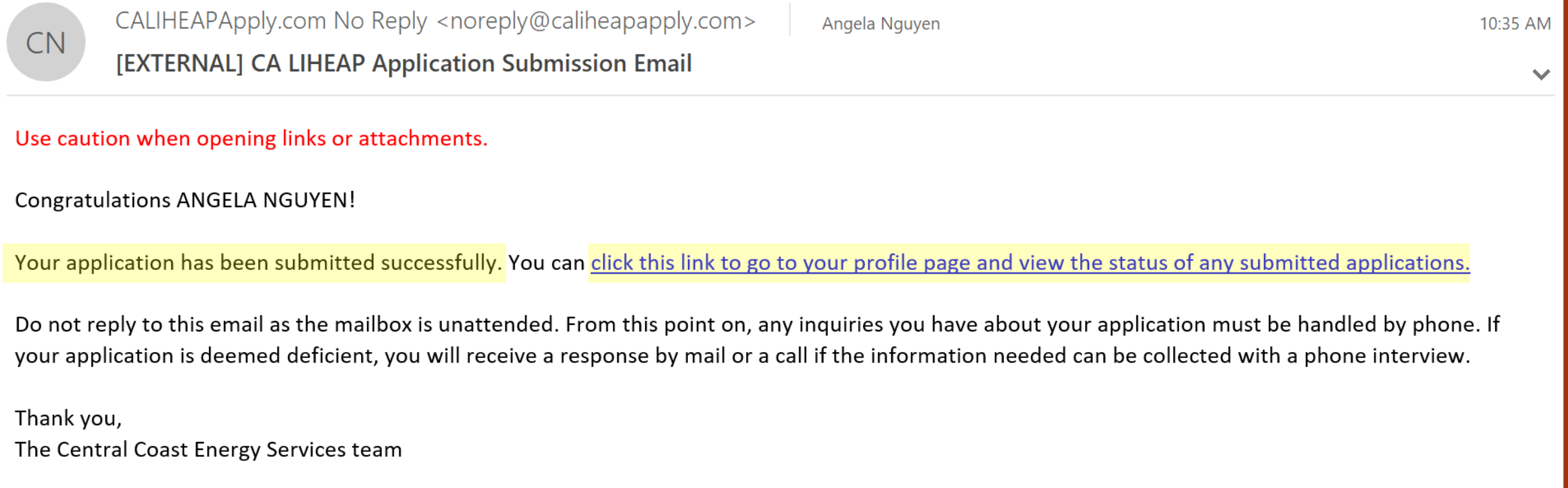
Form: Energy Conservation Tips

Instructions: Download these Energy Conservation Tips and learn simple ways you can save energy and money

[Download](#)

[RETURN TO PROFILE](#)

Confirmation Email



- Includes link to view application status

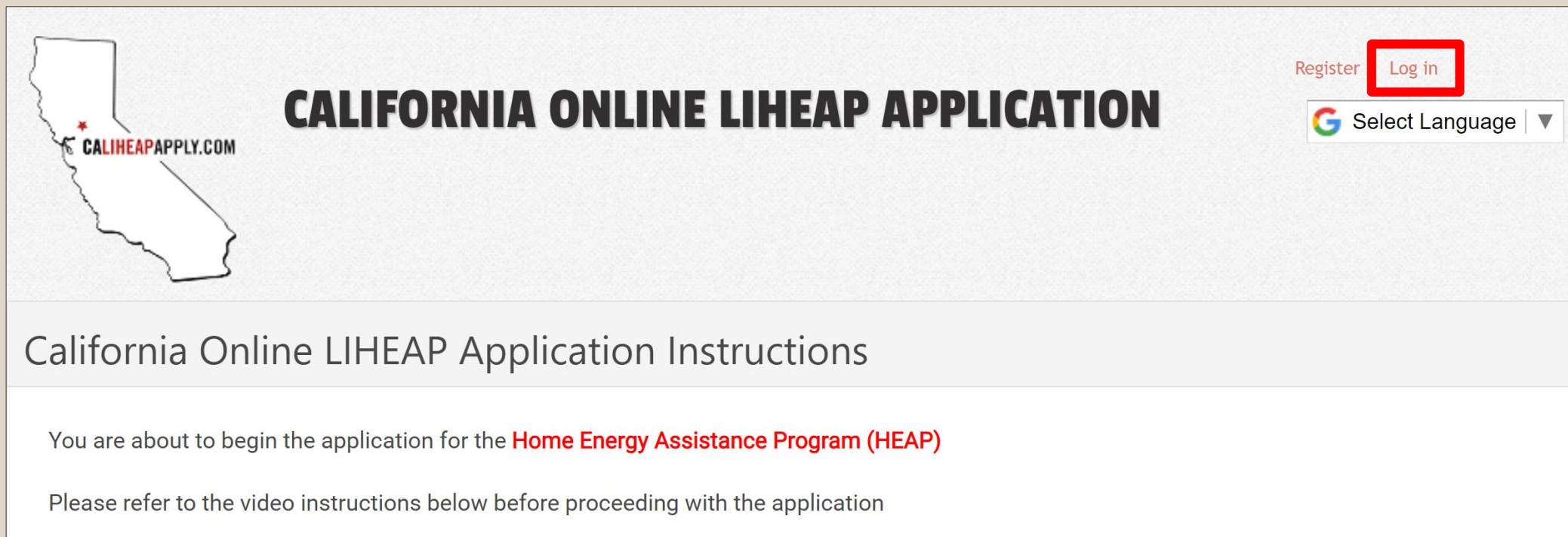
Other Notification Emails


- Customers will receive a notification email when application status changes
 - Deficient
 - Denied
 - Transferred

Processing a Submitted COMPLETE Application (Agency Side)

Agency Side – Step 1

- Log into account*



 **CALIFORNIA ONLINE LIHEAP APPLICATION**

Register Log in

Select Language ▼

California Online LIHEAP Application Instructions

You are about to begin the application for the **Home Energy Assistance Program (HEAP)**

Please refer to the video instructions below before proceeding with the application

**Agency employee will need to create their own account & have been provided with administrative access by ServTraq*

Agency Side – Step 2



CCES

CENTRAL COAST ENERGY SERVICES ONLINE LIHEAP APPLICATION

Hello, angie135 ! | [Log off](#)



Select Language | ▼

Manage User Profile

START A NEW LIHEAP APPLICATION

ADMINISTRATIVE PANEL

UPLOAD FILES

USER PROFILE INFORMATION

Name*: ANGELA

NGUYEN



IMPORTANT! Make sure you enter an email address you can access. If you change your email address, you will be required to confirm the address before you can continue to use the site.

Email Address*: angela@energyservices.org

Agency Side – Step 2 (cont.)

- Default page view: Submitted Applications

Online LIHEAP Application Admin Panel

Submitted Applications

User Administration

Agency Forms

Agency Settings

Hello, angie135 !

Log off

















Submitted Applications List

Search



Current View: In Progress Applications





Export to XLSX

Edit	CSD 43	Download PDF	Download Zip	Agency	First Name	Last Name
				Central Coast Energy Services, Inc.	SARAH	
				Central Coast Energy Services, Inc.	ROCI	
				Central Coast Energy Services, Inc.	OLEG	
				Central Coast Energy Services, Inc.	MIGUEL	

Agency Side – Step 3

- Click the **Download** icon to view customer's documents

Current View: In Progress Applications Export to XLSX

Edit	CSD 43	Download PDF	Download Zip
			

ApplicationFiles-68...

Extract

File Home Share View Compressed Folder Tools

Do... Applic...

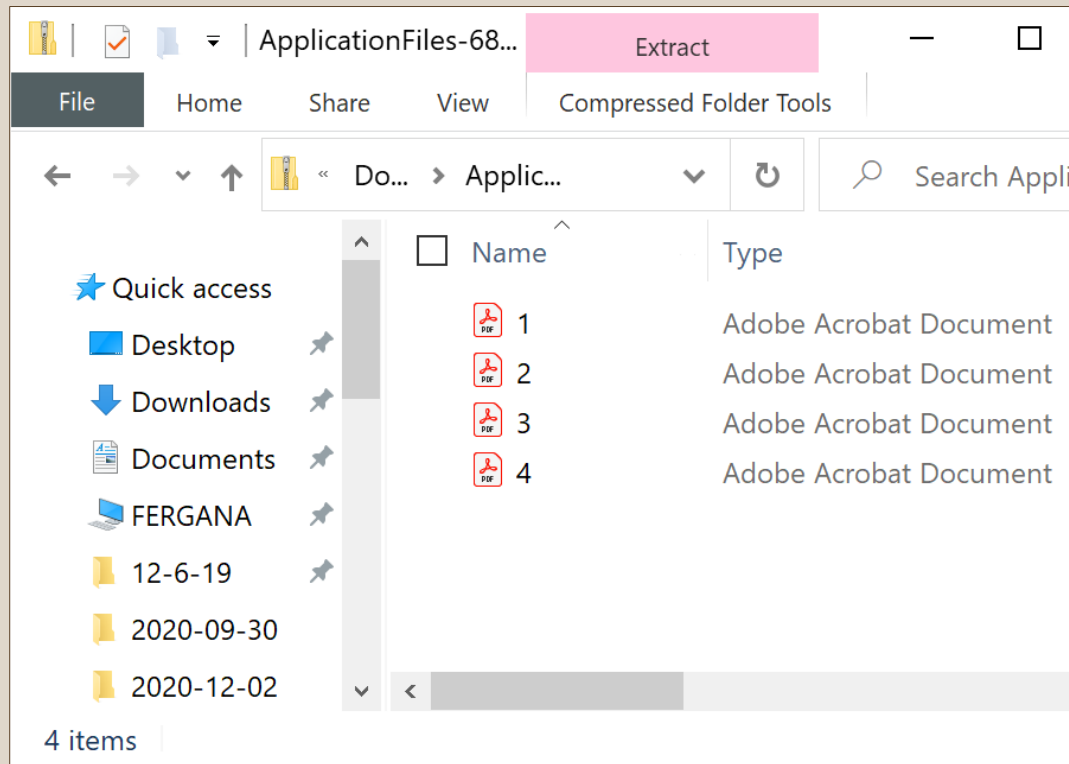
Search Appli

Name	Type
1	Adobe Acrobat Document
2	Adobe Acrobat Document
3	Adobe Acrobat Document
4	Adobe Acrobat Document

4 items

Agency Side – Step 3 (cont.)

- Review all submitted documents



3.pdf - Adobe Acrobat Reader DC

File Edit View Sign Window Help

Home Tools 1.pdf 2.pdf 3.pdf x 4.pdf ? Sign In

Save Star Cloud Print Search Up Down 1 / 6 Hand 75.8% ...

ENERGY STATEMENT
www.pge.com/MyEnergy

Account No:
Statement Date: 12/11/2020
Due Date: 01/04/2021

Service For:
Monday-Friday 7 a.m.-9 p.m.
Saturday 8 a.m.-6 p.m.
Phone: 1-800-743-5000
www.pge.com/MyEnergy

Questions about your bill?
Monday-Friday 7 a.m.-9 p.m.
Saturday 8 a.m.-6 p.m.
Phone: 1-800-743-5000
www.pge.com/MyEnergy

Ways To Pay
www.pge.com/waystopay

Your Enrolled Programs
CARE Discount

Your Account Summary

Amount Due on Previous Statement	\$233.46
Payment(s) Received Since Last Statement	-233.46
Previous Unpaid Balance	\$0.00
Current PG&E Electric Delivery Charges	\$164.13
Central Coast Community Energy Electric Generation Charges	109.75
Current Gas Charges	36.12
Total Amount Due by 01/04/2021	\$310.00

! Your bill includes a charge for High Usage.

Monthly Billing History

Daily Usage Comparison

1 Year Ago	Last Period	Current Period
40.23	35.46	44.63
Electric kWh / Day		
1.58	0.89	0.93
Gas Therms / Day		

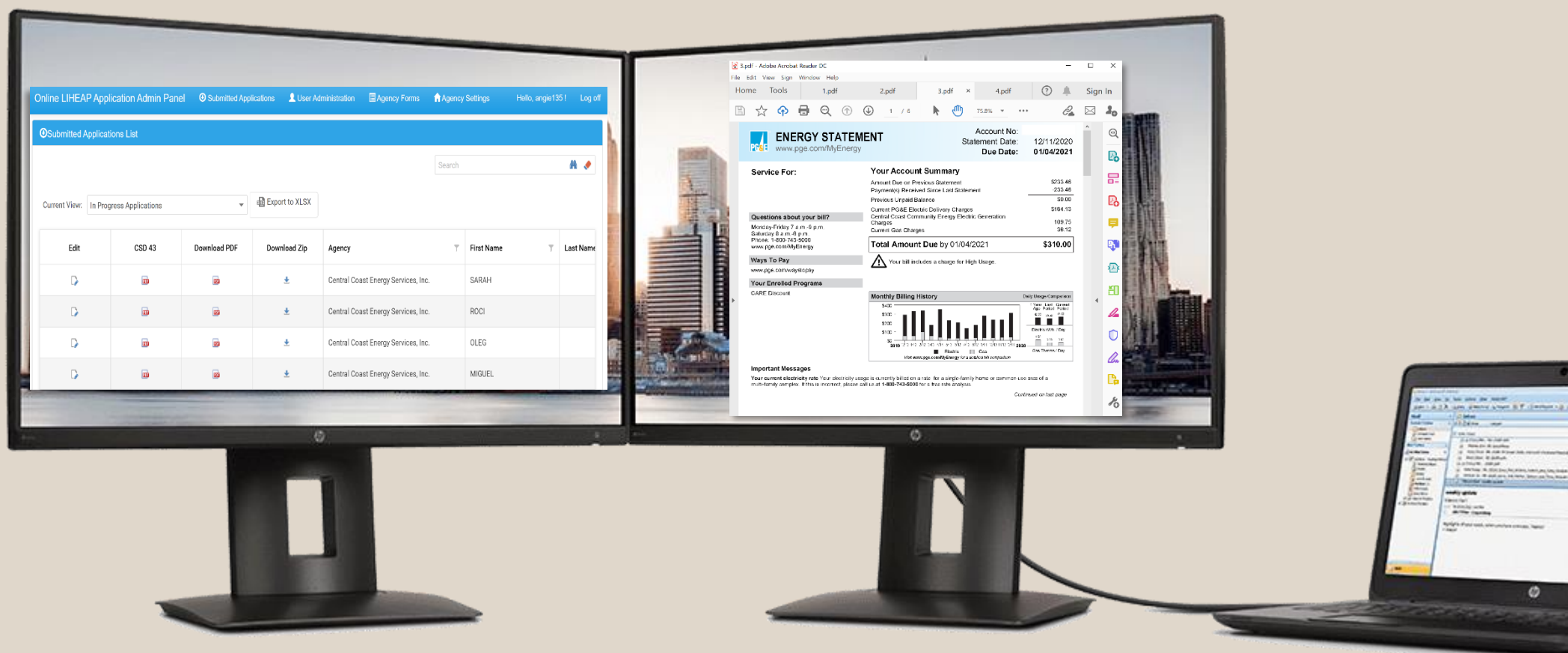
Visit www.pge.com/MyEnergy for a detailed bill comparison

Important Messages
Your current electricity rate Your electricity usage is currently billed on a rate for a single-family home or common-use area of a multi-family complex. If this is incorrect, please call us at 1-800-743-5000 for a free rate analysis.

Continued on last page






Agency Side – Step 3 (cont.)

- Dual monitor set up makes for quick and easy processing



Agency Side – Step 4

- Click the **Edit** icon to review submitted information

<div> <div>Current View:</div> <div>In Progress Applications</div> <div>  Export to XLSX </div> </div>					
Edit	CSD 43	Download PDF	Download Zip	Agency	First Name
				Central Coast Energy Services, Inc.	SARAH

Agency Side – Step 4 (cont.)

Edit Application

Application List
Save
Save and Close
Files
Push To ServTraq
Close Application

Printable Application
Application Data

Applicant Data

Name*:
SARAH

Social Security Number*:

Date of Birth*:

Primary Language*:
ENGLISH

Ethnicity*:

Primary Ethnicity
Ethnicity Subcategory

Home Phone:

Message Phone:
() -

Mobile Phone:
() -

Email Address*:

- Verify inputted information using submitted documents
- Fill in all required fields
- Click **Save**

Agency Side – Step 4 (cont.)

Editable Fields	NON-Editable Fields
<ol style="list-style-type: none"> 1. Personal Information 2. Addresses 3. Individual household members 4. Energy accounts 5. Income 	<ol style="list-style-type: none"> 1. Name

Agency Side – Step 5

Edit Application

[Application List](#) | [Save](#) | [Save and Close](#) | [Files](#) | **[Push To ServTraq](#)** | [Close Application](#)

[Printable Application](#) | **Application Data**

Applicant Data

Name*: SARAH

Social Security Number*:

Date of Birth*:

Primary Language*: ENGLISH

Ethnicity*:

Primary Ethnicity

Ethnicity Subcategory

Home Phone:

Message Phone: () -

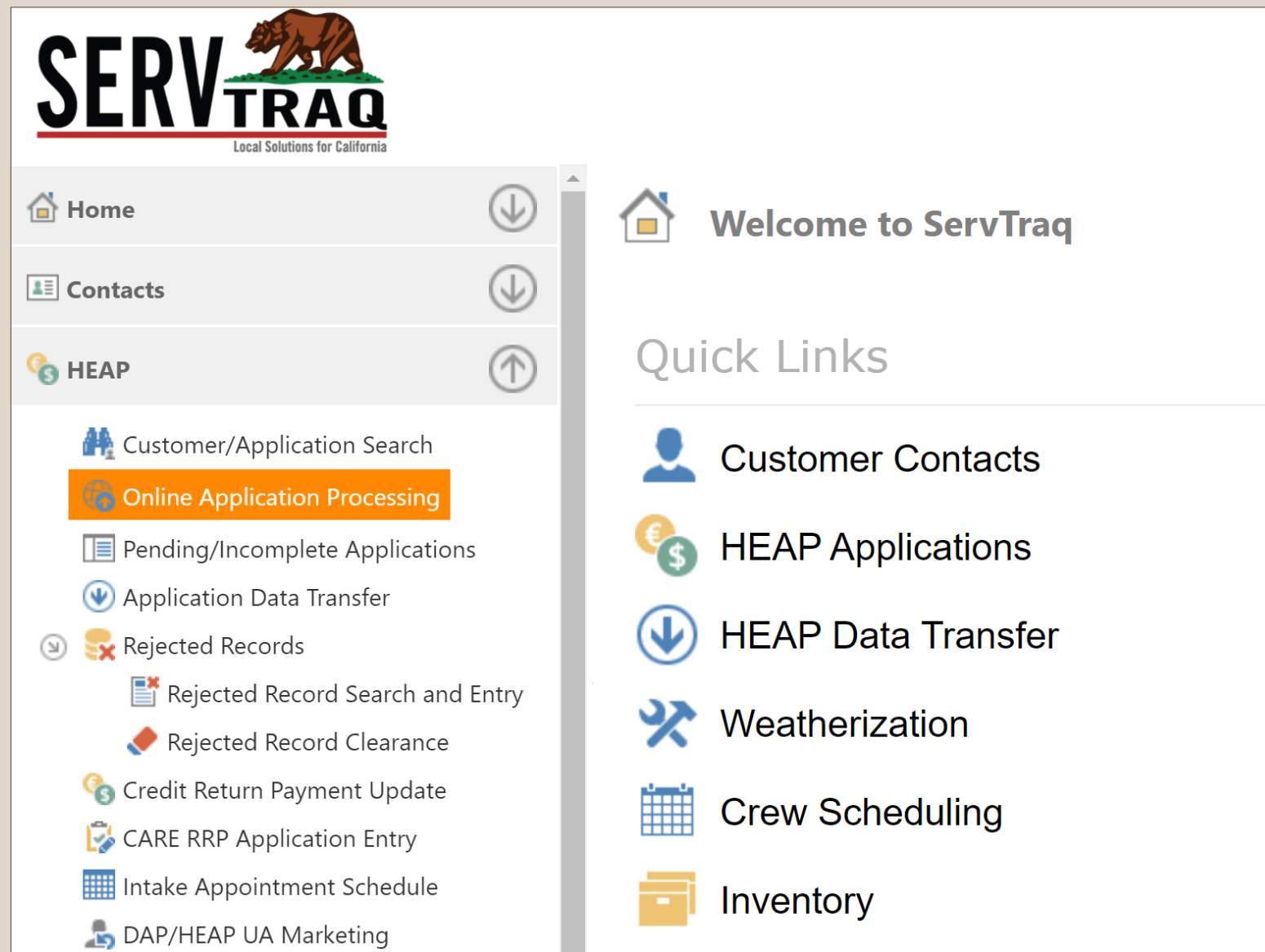
Mobile Phone: () -

Email Address*:

- Click **Push to ServTraq**

Agency Side – Step 6

- Log into ServTraq
- HEAP → Online Application Processing



The screenshot displays the SERVTRAQ Agency Side interface. At the top, the SERVTRAQ logo is visible with the tagline "Local Solutions for California". Below the logo, there is a navigation menu with three main categories: Home, Contacts, and HEAP. The HEAP category is expanded, showing a list of sub-options. The "Online Application Processing" option is highlighted in orange. To the right of the navigation menu, there is a "Welcome to ServTraq" message and a "Quick Links" section. The Quick Links section lists several options: Customer Contacts, HEAP Applications, HEAP Data Transfer, Weatherization, Crew Scheduling, and Inventory.

SERVTRAQ
Local Solutions for California

Home

Contacts

HEAP

Customer/Application Search

Online Application Processing

Pending/Incomplete Applications

Application Data Transfer

Rejected Records

Rejected Record Search and Entry

Rejected Record Clearance

Credit Return Payment Update

CARE RRP Application Entry

Intake Appointment Schedule

DAP/HEAP UA Marketing

Welcome to ServTraq

Quick Links

Customer Contacts

HEAP Applications


HEAP Data Transfer




Weatherization


Crew Scheduling

Inventory

Agency Side – Step 6 (cont.)


Online Application Processing

 Edit Application
  Refresh
  Export

Enter Search Criteria...
 

In Progress Applications

Program	Application Status	Intake Date	Customer Name	SSN	Date
Empty table body content					

- All applications “pushed” from online portal will appear in the **Online Application Processing** section

Agency Side – Step 7

Save

Save and Close

+ Add a Job

Exit

Delete

Refresh

Validate Addresses

Check Status in CORE

Sections

Program/Payment/Intake

Mailing Address

POS Address

Household

Electricity

Natural Gas

Wood/Propane/Oil

Additional Energy

Income

Performance Measures

Referrals

Rejections

Notes

Commitments

Recertifications

Files

CORE Status History

Monitoring Contacts

Audit/Change History

Edit Application

SARAH CUSTOMER, ApplicationID - 119362

Program/Payment/Intake

Customer: SARAH CUSTOMER

☐ Phone duplicate in PY?

Program: 2020

HEAP 2020

Program Year*

Program*

➔ Status: INCOMPLETE

DENIED

INCOMPLETE

ELIGIBLE

PENDING

Payment: \$0.00

\$0.00

Supp. Payment*

Total Payment*

Utility Paid: PACIFIC GAS & ELECTRIC COMPANY - 15161412131

➔ Intake: ONLINE

1/24/2020

1/24/2020

Intake Location

Intake Date*

Certification Date*

Language*: ENGLISH

Processing a Submitted INCOMPLETE Application (Agency Side)

Agency Side – Steps 1-3

- ✓ Logged in to administrative account
- ✓ Navigated to admin panel
- ✓ Select a customer and downloaded the customer's submitted documents

The problem: The customer did not submit all the required documents

The Submitted Documents

- Only 2 of the required 3!

The image shows two overlapping windows from a Windows operating system. The background window is a File Explorer window titled 'ApplicationFiles-48...' with the 'Extract' tab selected. It shows a folder named 'faces_of_liheap' containing two PDF files, '1' and '2'. The foreground window is '2.pdf - Adobe Acrobat Reader DC', displaying a document with the following text:


Wage: \$25
Pension: \$100
SSI: \$50





Agency Side – Step 4

- Click the **Edit** icon

Current View:

In Progress Applications


Export to XLSX

Edit	CSD 43	Download PDF	Download Zip	Agency	First Name	Last Name
				Central Coast Energy Services, Inc.	ANGELA	KIM

Agency Side – Step 5

Edit Application

Application List

Save

Save and Close

Files

Push To ServTraQ

Close Application

Printable Application

Application Data

1 of 2

Whole Page

Department of Community Services and Development

Energy Intake Form

CSD 43 (10/2017)

Official Use Only:

Priority Points

A.C.C.

Eligibility Cert Date

Agency: Central Coast Energy Services, Inc.

Intake Initials:

Intake Date: 12/15/2020

First Name

ANGELA

Middle Initial

Last Name

KIM

Date of Birth

MM/DD/YY 11/11/1996

SERVICE ADDRESS – Address where applicant lives (this cannot be a P.O. Box)

Service Address

479 LARSON COURT

Unit Number

Service City

MARINA

Service County

MONTEREY

Service State

CA

Service Zip Code

93933

Have you lived at this residence during each of the past 12 months?..... ☒ Yes ☐ No

Is your service address the same as mailing address?..... ☒ Yes ☐ No

Mailing Address

479 LARSON COURT

Unit Number

Mailing City

MARINA

Mailing County

MONTEREY

Mailing State


CA

Mailing Zip Code

93933

Agency Side – Step 6

Missing Documents

 Add Missing Document

Edit/Delete	Missing Document	Note	Document Url	Completed	Completed Date
No data to display					

Agency Side – Step 7

*Name/Type of
missing document*

Missing Document:*

Energy bill

Simple description of the required missing document

*Explanation/
Instructions*

Note:

Please upload all pages of recent energy bill

Any more details on what the applicant needs to provide that will help them complete the application successfully

*Public URL (if
applicable)*

Document Url:




Enter the url of the required document if any. It must be a fully qualified url.

Example:

https://www.energyservices.org/apps/HEAP_IncomeDocumentRequirements.pdf







Agency Side – Step 7 (cont.)

Missing Documents					
<div><div> Add Missing Document</div></div>					
Edit/Delete	Missing Document	Note	Document Url	Completed	Completed Date
<div><div> </div></div>	Energy bill	Please upload all pages of recent energy bill		<input type="checkbox"/>	

Deficient Application List

Current View: Deficient Applications

 Export to XLSX





Edit	CSD 43	Download PDF	Download Zip	Agency	First Name	Last Name
				Central Coast Energy Services, Inc.	ANGELA	KIM

- Adding a request for a Missing Document will move the application to the **Deficient Application** list

Agency Side – Steps 7 & 8

- After customer uploads missing documents, application will move from the **Deficient Application** list to the **Corrected Applications** list

Current View: Corrected Applications Export to XLSX

Edit	CSD 43	Download PDF	Download Zip	Agency	First Name	Last Name
				Central Coast Energy Services, Inc.	ANGELA	KIM

- Click the **Download** icon to view all documents
- Click the **Edit** icon to view application

Agency Side – Step 9 & 10

- Verify entered information using submitted documents & edit if necessary
- Click **Push to ServTraq**

Edit Application

Application List

Save

Save and Close

Files

Push To ServTraq

Close Application

Printable Application

Application Data

Applicant Data

Name*:

ANGELA

KIM

Social Security Number*:

818-18-1818

Date of Birth*:

11/11/1996

Primary Language*:

ENGLISH

Ethnicity*:

Primary Ethnicity

Ethnicity Subcategory

Agency Side – Step 10 (cont.)

Edit Application

[Application List](#)
[Save](#)
[Save and Close](#)
[Files](#)
[Push To ServTraq](#)


Application exported to ServTraq successfully. The application id in ServTraq is 119390

[Printable Application](#)
[Application Data](#)

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Whole Page
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Department of Community Services and Development

Energy Intake Form

CSD 43 (10/2017)

Agency: Central Coast Energy Services, Inc.

Intake Initials:

Intake Date: 12/15/2020

Official Use Only:

Priority Points

A.C.C.

Eligibility Cert Date

First Name

ANGELA

Middle Initial

Last Name

KIM

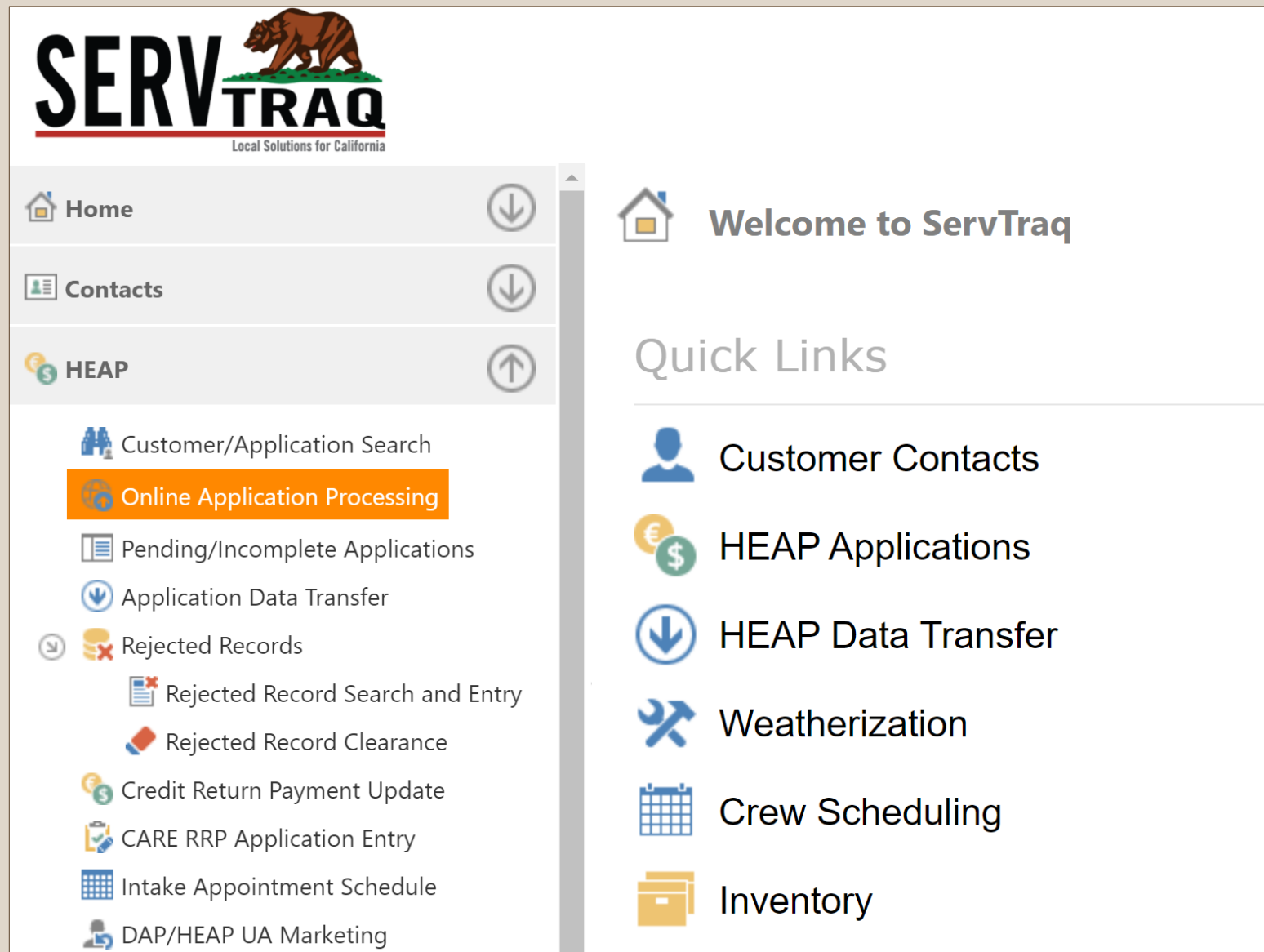
Date of Birth

MM/DD/YY

11/11/1996

Agency Side – Step 11

- Log into ServTraq
- HEAP → **Online Application Processing**



The screenshot displays the SERVTRAQ Agency Side interface. At the top, the SERVTRAQ logo is visible with the tagline "Local Solutions for California". Below the logo, there is a navigation menu with three main categories: Home, Contacts, and HEAP. The HEAP category is expanded, showing a list of sub-options. The "Online Application Processing" option is highlighted in orange. To the right of the navigation menu, there is a "Welcome to ServTraq" message and a "Quick Links" section. The Quick Links section lists several options: Customer Contacts, HEAP Applications, HEAP Data Transfer, Weatherization, Crew Scheduling, and Inventory.

SERVTRAQ
Local Solutions for California

Home

Contacts

HEAP

Customer/Application Search

Online Application Processing

Pending/Incomplete Applications

Application Data Transfer

Rejected Records

Rejected Record Search and Entry

Rejected Record Clearance

Credit Return Payment Update

CARE RRP Application Entry

Intake Appointment Schedule

DAP/HEAP UA Marketing

Welcome to ServTraq

Quick Links

Customer Contacts

HEAP Applications

HEAP Data Transfer

Weatherization

Crew Scheduling

Inventory

Agency Side – Step 11 (cont.)



Online Application Processing



Edit Application



Refresh



Export

Enter Search Criteria...



In Progress Applications

Program	Application Status	Intake Date	Customer Name	SSN	Date

- All applications “pushed” from online portal will appear in the **Online Application Processing** section

Agency Side – Step 12

Save

Save and Close

Add a Job

Exit

Delete

Refresh

Validate Addresses

Check Status in CORE

Sections

Program/Payment/Intake

Mailing Address

POS Address

Household

Electricity

Natural Gas

Wood/Propane/Oil

Additional Energy

Income

Performance Measures

Referrals

Rejections

Notes

Commitments

Recertifications

Files

CORE Status History

Monitoring Contacts

Audit/Change History

Edit Application

ANGELA KIM, ApplicationID - 119390

Program/Payment/Intake

Customer: [ANGELA KIM](#)

☐ Phone duplicate in PY?

Program: 2020

HEAP 2020

Program Year*

Program*

Status: INCOMPLETE

DENIED

INCOMPLETE

ELIGIBLE

PENDING

Payment: INCOMPLETE

\$0.00

\$0.00

Supp. Payment*

Total Payment*

Utility Paid: [HOME GAS & ELECTRIC COMPANY - 81234567893](#)

Priority Points: 0

Intake: ONLINE

12/15/2020

12/15/2020

Intake Location

Intake Date*

Certification Date*

Language*: ENGLISH

Monthly Energy Cost*: \$300.00



Thank you!

Questions, Comments, Concerns?

Support@ServTraq.com

(831) 761-1747