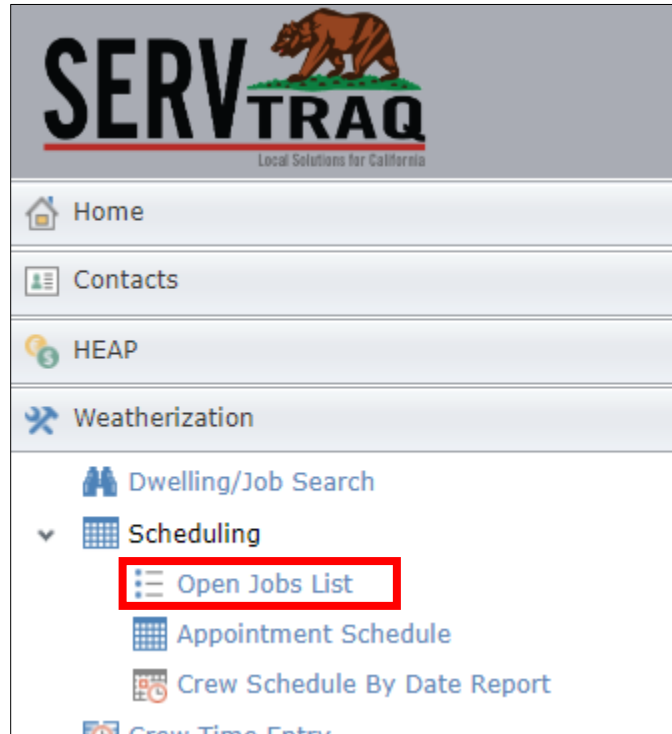


Unlink and Relink the Eligibility Record on a Job

Step 1

Navigate to the Open Jobs List under the Weatherization tab. Use the search box to locate the dwelling.



Open Jobs List									
Views: [dropdown] Customize Export to Map View Color Key [search box: 36625] [user icon] [refresh icon]									
Drag a column header here to group by that column									
Dwelling ID	Job ID	ACC	Job Type	Current Status	Tags	Crew Leader	WSAG Signe		
28528	36601		SWEATS ONLY	NO STATUS			8/31/2020		
28534	36610		INITIAL WEATHERIZATION	NO STATUS			1/1/2022		
28535	36614		INITIAL WEATHERIZATION	NO STATUS			6/8/2022		
16881	36621		INITIAL WEATHERIZATION	NO STATUS			5/12/2011		
24168	34243		LIEE REFRIGERATOR REPLACE	NO STATUS			2/5/2013		
13807	34212		REWEATHERIZATION	NO STATUS			9/3/2013		

Step 2

Click on the Job ID to open the job.

Open Jobs List						
Views: Customize Export to Map View Color Key						
Drag a column header here to group by that column						
Dwelling ID	Job ID	ACC	Job Type	Current Status	Ta	
27421	36625		CALLBACK	NO STATUS		

Step 3

Click **View/Edit Eligibility Record** to verify the existing eligibility record.

Save
Save and Close
Exit
Delete
Refresh
Link
Unlink
Reports
Clone Job
Mark Covid-19 Partial

Sections
Assessment Items
Job Details
Measures
Validation Summary
Rejections
ECIP Justification
Deferrals
Post Inspections
Notes
eCore Submissions
Work Orders
Related
Appointments
Status History
Files
Image Gallery
Audit/Change History

Edit Job
JobID - 36625, 3637 PINE AVE, LONG BEACH, 90807


Eligibility Details
Customer: JACK RIPPER
Eligibility: [View/Edit Eligibility Record](#)

Dwelling Assessment Items

Assessment Date:
Dwelling Year Built:
HUD Funded?:
Lead-Safe WX Req'd?:
Attached Units:
CEC Climate Zone:
Tenancy:
Building Structure:
Cooking Appliance Type:
Cooking Energy:

Cooking Oper. Status:
Heater Type:
Heating Energy:
Heater Oper. Status:
Water Heater Type:
Water Heating Energy:
Water Heater Oper. Status:
Cooling Type:
Cooling Oper. Status:

In this case, the existing eligibility record is a transferred 2022 LIHEAP Fast Track application. This needs to be unlinked for a job with 2023 LIHEAP measures.


Edit Application
JACK RIPPER, ApplicationID -

Program/Payment/Intake

Customer: [JACK RIPPER](#)

☐ Phone duplicate in PY?

Program:
Program Year*

Program:
Program*

Status:
Application Status*

Transfer Date








Payment:
Base Payment


Supp. Payment*

Total Payment*

Step 4

Return to the Job and click **Unlink** at the top.

 Delete
 Refresh
 Link
 **Unlink**
 Reports
 Clone Job
 Mark Covid-19 Partial


Edit Job
JobID - 36625, 3637 PINE AVE, LONG BEACH, 90807

Eligibility Details

Customer: [JACK RIPPER](#)
Eligibility: [View/Edit Eligibility Record](#)

Step 5

This will prompt a dialog box to open. Click **OK** to unlink the eligibility record.

Delete

servtraqazure.com says

Do you really want to unlink this job and associated eligibility and occupant data?

OK

Cancel

Eligibility Details

Customer: JACK RIPPER

Eligibility: [View/Edit Eligibility Record](#)

After unlinking the eligibility record, both the customer and the eligibility record fields will be blank.

Save

Save and Close

Exit

Delete

Refresh

Link

Unlink

Reports

Clone Job

Mark Covid-19 Partial

Sections

- Assessment Items
- Job Details
- Measures
- Validation Summary
- Rejections
- ECIP Justification
- Deferrals
- Post Inspections
- Notes
- eCore Submissions
- Work Orders

Related

- Appointments
- Status History
- Files
- Image Gallery
- Audit/Change History

Edit Job

JobID - 36625, 3637 PINE AVE, LONG BEACH, 90807

Link Eligibility

Customer:

Existing Eligibility Records:

Customer:

Eligibility:

Dwelling Assessment Items

Assessment Date:

Cooking Oper. Status:

OPERATIONAL

Dwelling Year Built:

Heater Type:

HUD Funded?:

☐

Heating Energy:

MANUFACTURED LOG

Lead-Safe WX Req'd?:

☐

Heater Oper. Status:

OPERATIONAL

Attached Units:


1

Water Heater Type:

CONVENTIONAL

Step 6

Click the dropdown list for Customer. Enter in the name or any other identifying information for the customer. Select the correct customer from the dropdown list.


Edit Job
JobID - 36625, 3637 PINE AVE, LONG BEACH, 90807


Link Eligibility

Customer:

New	First Name	Last Name	SSN	Date of Birth	Area Code	Phone
	jack	ripper				
	JACK	RIPPER	605058210	1/1/1970	562	2164600

Dwelling Assessment Items

Once selected, the customer will appear in the field.


Edit Job
JobID - 36625, 3637 PINE AVE, LONG BEACH, 90807

Link Eligibility

Customer:


Existing Eligibility Records:

Customer:

Eligibility:

Step 7

Under **Existing Eligibility** Record, click **NEW**.


Edit Job
JobID - 36625, 3637 PINE AVE, LONG BEACH, 90807

Link Eligibility

Customer:

Existing Eligibility Records:

Customer:

Eligibility:

New	Application ID	POS Address	POS City	POS Zip Code	County Name	Certification Date
	119483	3637 PINE AVE	LONG BEACH	90807	LOS ANGELES	10/31/2022


Dwelling Assessment

Assessment Date:

Cooking Oper. Status:

Step 8

A new window will open to add the eligibility record. Complete all the required fields.


Add Eligibility Record
New Eligibility Record

Eligibility Details

Customer: [JACK RIPPER](#)
Intake:
Intake Date* Certification Date*
Language*:
Monthly Energy Cost*:
Energy Burden:

Household


Energy - Primary Account

Energy - Secondary Account

Household Income

Step 9

After the new eligibility record has been added, it will appear in the dropdown list. Select the newly added eligibility record.


Edit Job
JobID - 36625, 3637 PINE AVE, LONG BEACH, 90807

Link Eligibility

Customer:
Existing Eligibility Records:

	New	Application ID	POS Address	POS City	POS Zip Code	County Name	Certification Date
Customer:							
Eligibility:							
		119483	3637 PINE AVE	LONG BEACH	90807	LOS ANGELES	10/31/2022
		119484	3637 PINE AVE	LONG BEACH	90807	LOS ANGELES	10/31/2022

Dwelling Assessment

Assessment Date:
Dwelling Year Built:

Once the new eligibility record has been selected, it will appear in the field.

Delete	Refresh	Link	Unlink	Reports ▾	Clone Job	Mark Covid-19 Partial
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Edit Job
JobID - 36625, 3637 PINE AVE, LONG BEACH, 90807

Link Eligibility

Customer: JACK RIPPER ▾

Existing Eligibility Records: 119484 ▾

Customer:

Eligibility:

Step 10

Click **Link** at the top.

Delete	Refresh	Link	Unlink	Reports ▾	Clone Job	Mark Covid-19 Partial
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Edit Job
JobID - 36625, 3637 PINE AVE, LONG BEACH, 90807

Link Eligibility

Customer: JACK RIPPER ▾

Existing Eligibility Records: 119484 ▾

Customer:

Eligibility:

Step 11

This will prompt a dialog box to open. Click **OK** to link the new eligibility record.

×

Delete

servtraqazure.com says

Do you really want to link this job to the selected eligibility and occupant records?

OK

Cancel

Home

Clone Job

Mark Covid-19 Partial

90807

Link Eligibility

Customer: JACK RIPPER

Existing Eligibility Records: 119484

Customer:

Eligibility: