

Race, Ethnicity, and Gender on Customer Record and Application

As of Program Year 2023, CSD requires the following fields to be entered on all utility assistance applications:

- Household Ethnicity
- Household Race
- Household Gender
- Customer Ethnicity
- Customer Race
- Customer Gender


The race, ethnicity, and gender must be entered in two different sections in ServTraq: the Customer Record and the Application. The demographic fields entered in the Customer Record **MUST** match the demographic fields entered on the Customer's application, and vice versa.

Customer Record

Step 1: Navigate to Contacts → Customer Search/Incoming Contact Entry.

The screenshot shows the ServTraq web application interface. On the left is a navigation sidebar with the following menu items: Home, Contacts (expanded), Incoming Application Processing, Customer Search/Contact Entry (highlighted with a red box), Callbacks, Customer Contacts, AMP Marketing List, HEAP, Weatherization, Inventory, Reports, Analytics, and Administration. The main content area is titled 'Customer Search/Incoming Contact Entry'. It contains a 'Search Parameters' section with the following fields: Name (First Name, Last Name), Social Security Number, Phone Number, Date of Birth (dropdown), Mailing Address (Street #, Street Name, Unit Number), Mail Zip/City (Zip Code, City), Email Address, Notes (text area with placeholder 'Enter a note term to search'), and Customer ID (text field). Below these fields are two green buttons: 'SUBMIT' and 'CLEAR'. At the bottom of the page, there is a row of action buttons: '+ New Customer', 'Edit Customer', 'Refresh List', and 'Export List'.

Step 2: Search for the Customer using the available fields and click *Submit*.
If the Customer cannot be found, click *Add New Customer*.



Home

Contacts

Incoming Application Processing

Customer Search/Contact Entry

Callbacks

Customer Contacts

AMP Marketing List

HEAP

Weatherization

Inventory

Reports

Analytics

Administration

Customer Search/Incoming Contact Entry

Search Parameters

Name:

First Name

Last Name

Social Security Number:

Phone Number:

Phone Number

Date of Birth:

Mailing Address:

Street #

Street Name

Unit Number

Mail Zip/City:

Zip Code

City

Email Address:

Email Address

Notes:

Enter a note term to search

Customer ID:

Customer ID#

SUBMIT

CLEAR

+ New Customer

Edit Customer

Refresh List

Export List

Step 3: Once the Customer has been located or added, click on the Customer's name.

Customer Search/Incoming Contact Entry

Search Parameters

Name:

CUSTOMER

CHA

Social Security Number:

Phone Number:

Phone Number

Date of Birth:

Mailing Address:

3110

EVERETT

Unit Number

Mail Zip/City:

93933

City

Email Address:

Email Address

Notes:

Enter a note term to search

Customer ID:

Customer ID#

SUBMIT

CLEAR

+ New Customer

Edit Customer


Refresh List

Export List

Search Results

Name	SSN	Date of Birth	Mailing Address	Mail City	Mail Zip Code
CUSTOMER CHA			3110 EVERETT CIR	MARINA	93933

Step 4: Complete the Race, Ethnicity, and Gender fields under the Customer Details section. If these fields are not collected by the agency, select *Unknown/Not Reported*.

 Edit Customer
CHA, CUSTOMER - CustomerID#: 76842

Customer Details

Name*:
First Name: CUSTOMER MI: Last Name: CHA

Social Security Number: _____

Date of Birth: _____


Race: _____
Primary Race Race Subcategory

Ethnicity/Gender: _____
Ethnicity Gender

Special Handling?: ☐ Alerts user to consult management prior to making any changes to the customer record

Customer's Application

Step 1: Navigate to HEAP → Customer/Application Search.

 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

Core Web Service Transfer Results

Transferred Applications not in CORE

CARE RRP Application Entry

Intake Appointment Schedule

UA Marketing - HEAP/LIHWAP/ARPA

LIHWAP Utilities

TapHelp.org LIHWAP Referrals

United Way Rent & Utility Assistance

United Way Application Search

Customer/Application Search

SEARCH PARAMETERS

Barcode: _____

Name: First Name Last Name

Social Security Number: _____

Phone Number: Phone Number

Date of Birth: _____

POS Address: Street # Street Name Unit Num

POS Zip/City: Zip Code City


Account Number: Utility Account Number

Second Account Number: Second Utility Account N

Reverse Lookup: ApplicationID



SUBMIT CLEAR

Step 2: Search for the Customer's application using the available fields and click *Submit*.
If the Customer's application cannot be found, add the appropriate *New Application*.

 Customer/Application Search

SEARCH PARAMETERS

Barcode:
Name:
Social Security Number:
Phone Number:
Date of Birth:
POS Address:
POS Zip/City:
Account Number:
Second Account Number:
Reverse Lookup:

+ New Customer
+ New HEAP Application
 HEAP Application Wizard
+ New LIHWAP Application
+ New Drought Asst Application
 Edit Application

Search Results

Program	Application Status	Payment Amount	Intake Date	Transfer Date	Customer Name	SSN
					CUSTOMER CHA	

Step 3: After the Customer's application has been located or added, open the Application.

Step 4: Once the application is open, scroll to the *Household* section and select the appropriate entry type: Summary or Individual. (*This selection is determined by each agency.*)

Household

Choose a demographics entry type:

☒ Summary - Numbers per category
☐ Individual Household Members (CSBG Data)

Summary Demographic Counts

Agency Defined

A. Summary – Numbers per category

If Summary is selected, open the Summary Demographics Counts subsection and complete the Gender, Race, and Ethnicity fields.

The demographic fields on the Application must match the demographic fields entered in the Customer Record.

Household

Choose a demographics entry type:

☒ Summary - Numbers per category

☐ Individual Household Members (CSBG Data)

Summary Demographic Counts

Agency Defined

Gender
Total of the 4 gender categories below must total the household size

Self-Identified Male: 0

Self-Identified Female: 0

Other: 0

Unknown/Not Reported: 0

Race
Total of the 8 race categories below must total the household size

Amer. Ind./Alaskan: 0

Asian: 0

Black/Afr. Amer.: 0

Hawaiian/Pac. Isl.: 0

White: 0

Multi-Race: 0

Other: 0

Unknown/Not Reported: 0

Ethnicity
Total of the 3 ethnicity categories below must total the household size

Hispanic: 0

Non-Hispanic: 0

Unknown/Not Reported: 0

B. Individual Household Members (CSBG Data)

If Individual is selected, open the Household Members subsection and click *Add Household Member*.

Household

Choose a demographics entry type:

☐ Summary - Numbers per category

☒ Individual Household Members (CSBG Data)

Household Information (CSBG)

Household Members

Add Household Member

Import Household Members

	First Name	MI	Last Name	Date Of Birth	SSN

Complete the Gender and Race fields. If the household member is Hispanic, mark the checkbox.

The demographic fields on the Application must match the demographic fields entered in the Customer Record.

Add New Household Member

First Name:*

CUSTOMER

MI:

Last Name:*

CHA

Date Of Birth:*

SSN:

__-__-__

Gender:*

Race:*

Relation to Applicant:*

SELF

Education Level:*

Hispanic:

☐