

ServTraq User Security Roles

The following list represents a general overview of the different security roles in ServTraq.

Last Updated 3/6/2024

Agency Admin	Agency Admin user have access to all modules
HEAP Admin	<p>HEAP admin users only have access to the following:</p> <ul style="list-style-type: none"> • Home- Payment Receipt Log • Contacts- All sections • HEAP- All sections • Reports- (except Wx Admin Reports and Inventory Reports) • Analytics- Payment Assistance Only
HEAP Basic	<p>HEAP basic users only have access to the following:</p> <ul style="list-style-type: none"> • Home- Payment Receipt Log • Contacts - All sections except customer contacts • HEAP <ul style="list-style-type: none"> *Customer Search/ Application Data Entry *Online Application Processing * Pending/Incomplete Applications * CORE Web Service Transfer Results *CARE RRP Application Entry * Intake Appointment Schedule *UA Marketing • Weatherization <ul style="list-style-type: none"> * Weatherization Marketing * UA Marketing from Wx Dwellings • Inventory <ul style="list-style-type: none"> *Payment Request • Reports <ul style="list-style-type: none"> *Basic Daily Reports and Basic WX Reports
HEAP Transfer	<p>HEAP Transfer users only have access to the following:</p> <ul style="list-style-type: none"> • Home- Payment Receipt Log • Contacts - All sections except customer contacts • HEAP - All sections except Credit Return Payment Update • Weatherization <ul style="list-style-type: none"> * Weatherization Marketing * UA Marketing from Wx Dwellings • Inventory <ul style="list-style-type: none"> * Payment Request • Reports <ul style="list-style-type: none"> * Basic Daily Reports and Basic WX Reports • Analytics- Payment Assistance Only
HR	<p>HR users have access to the following:</p> <ul style="list-style-type: none"> • Inventory <ul style="list-style-type: none"> *Payment Request • Administration <ul style="list-style-type: none"> * Data Administration (Only Workers Comp Admin and Job Description Admin) * Human Resources

Wx Admin	<p>Wx Admin users only have access to the following:</p> <ul style="list-style-type: none"> • Home- Payment Receipt Log • Contacts- All sections (Except AMP Marketing List) • HEAP <ul style="list-style-type: none"> * Customer Search/ Application Data Entry • Weatherization - All sections • Inventory - All sections • Reports- All basic Daily Reports and Wx Reports • Analytics- Wx Custom Reports
Wx Basic	<p>Wx Basic users only have access to the following:</p> <ul style="list-style-type: none"> • Home- Payment Receipt Log • Contact <ul style="list-style-type: none"> * Incoming Application Processing * Customer Search/ Contact Entry * Callbacks • HEAP <ul style="list-style-type: none"> * Customer/ Application Search * Intake Appointment Schedule • Weatherization- All sections (Except Wx Admin) • Inventory <ul style="list-style-type: none"> * Payment Request • Reports <ul style="list-style-type: none"> * Basic Daily Reports and Basic WX Reports
Crew	<p>Crew users have access to the following through the mobile app:</p> <ul style="list-style-type: none"> • Appointments <ul style="list-style-type: none"> * View current and future jobs on the appointment schedules. * Upload pictures to jobs * Access customer contact information <ul style="list-style-type: none"> * Customer name * Customer address/ directions * Customer phone number • Access electric forms <p>If you want to restrict access solely to job appointments through the mobile app, assign "crew only" permissions to a user, thereby limiting access to the ServTraq web-based platform and its additional features. The "crew only" role will effectively block access to the website version.</p>
Data Admin	<p>Data Admin users have access to the following:</p> <ul style="list-style-type: none"> • Home- Payment Receipt Log • Contacts- All sections • HEAP- All sections • Weatherization - All sections • Inventory- All sections • Reports - All sections • Analytics- All • Administration <ul style="list-style-type: none"> * Agency Details * ECore Reconciliation Report * Data Administration (See Attached for details) <p>This setting is recommended for program administrators</p>