



Utility Assistance 101

April 2, 2024

Webinar Agenda

- **Searching/ Adding Customer**
- **Searching/ Adding Applications**
- **Logging Customer Contacts**
- **Callbacks**
- **Application Data Entry and Features**
- **Application Transfers**
- **Correcting Rejected Records**

New Customer Calls the Agency

- Leaves a voicemail with the following information:
 - **Name:** Josh Franco
 - **Address:** 25 Aviation Way
Watsonville, CA 95076
 - **Phone #:** 831-888-3333
- Create a new customer

Existing Customer Calls the Agency

- Leaves a voicemail with the following information:
 - **Name:** Lizbeth Perez
 - **Address:** 23 Aviation Way
Watsonville, CA 95076
 - **Phone #:** 831-777-2222

Customer is Requesting a HEAP Application

1. Enter the Contact Entry
 - Contact Type
 - Contact Action
 - Call Code
 - Language
 - Notes
 - Mailing Code
2. Application will be mailed out

Customer calls requesting Application Status

1. Log incoming call
2. Call will be added to the
Callbacks list
3. Clear call by returning call

Callbacks List

1. Log incoming call
2. Call will be added to the
Callbacks list
3. Clear call by returning call

Customer Search vs. Incoming Application Processing

Customer Search- finding a particular customer record

Incoming Application Processing- finding a customer that has a current application on file

Customer Mailed in the Application

1. Search for customer under Incoming Application Processing
 - a. *If new customer, add customer then receive*
1. Receive Application

Customers Application is Deficient

- Customers application is incomplete and is missing required documentation
- Enter a deficient application contact entry

Complete Application

- Long Scroll Method
- Summary Household

Complete Application

- Wizard Method
- Individual Household

Saved Application Features

- Referrals
- Rejections
- Notes
- Commitments
- Recertifications
- Files
- CORE Status History
- Monitoring Contacts
- Audit/Change History

Transferring Applications

- Selecting specific applications
- Total sum of selected applications
- Certification Date Color Key
 - **RED**: 120+ days, CORE Rejection
 - **YELLOW**: 91-120 days
 - **GREEN**: Less than 90 days

Rejected Records with Corrections

1. **Application must be created within 120 days of Certification date.**
 - Add a Recertification Entry on the application
2. **SSN matches another applicant with a different name. Please contact CSD.**
 - Merge customer records with same SSN.
3. **Payment Amount is Incorrect.**
 - Ask CSD to put the application “Working-Deficient” Status
 - Click “Check CORE Status in CORE” on the application
 - Update the payment amount
4. **Phone number is a duplicate and phone dup flag is not set.**
 - Check the box “duplicate phone number” on the application

FAQ

1. **How can our agency manage duplicate applications?**
 - Identify the primary application and deny the duplicate
2. **How can our agencies manage multiple customer records for the same customer?**
 - Identify the primary record (record with most history) and merge multiple customer records in agency settings.

FAQ

3. **CSD CORE returned part/all of a benefit amount for an application. How can I get ServTraQ to reflect that we still have this amount?**
 - Log the returned benefit amount in the Credit Return Payment Update



THANK YOU!

We'd be happy to answer any questions.

support@servtraq.com