Energy Outreach Colorado
Agency User Guide

Browser Requirement: Internet Explorer 10+, Google Chrome, or Mozilla Firefox.

Agency Activities:

- Log in and view messages from EOC on dashboard .......................................................... 3
- Create a new client application ....................................................................................... 10
- Submit an agency Grant application ............................................................................... 15
- Pay a utilities for one or more client applications or update check# on paid client applications ...................... 17
- Create a new case worker user ....................................................................................... 20
- View Reports .................................................................................................................. 22
- Update Agency Information ............................................................................................ 23
- Agency Grant Applications .............................................................................................. 26
- FAQs ................................................................................................................................. 28
Log In and View Messages

To login to the EOC database, go to the Energy Outreach Colorado website at [www.energyoutreach.org](http://www.energyoutreach.org) and click on “Partner Login” at the bottom of the page. The following will appear:

![Login Button]

Cash Assistance Resources

2014-2015 Home Energy Assistance Grant Documents

- Database Training Manual
- PUC Consent Form
- 2014-2015 Webinar Presentation
- 2014-2015 Grant Guidelines
- LEAP Information Sheet – English  |  LEAP Information Sheet – Spanish
- LEAP Application – English  |  LEAP Application – Spanish
- Weatherization Information for Denver and Jefferson Counties
- Weatherization Application for Denver and Jefferson Counties

This screen contains all the documents that you may require to administer this grant; they will be updated from time to time.
Login Screen

Click on

and the “Login” screen appears:
1. Caseworkers will be given personal logins (as opposed to general organization logins) to the application. Records will be associated with the users who created and edited them. (TIP: If you already have an EOC user ID, it has not changed.)
2. When caseworkers log in for the first time the password defaults to 123456.
3. At the first login, the caseworker will be prompted to change their password and re-login.
4. Once this is completed, the caseworker will be asked to set up some security questions and answers.
5. Caseworkers will need these security questions and answers if they forget their password.
6. If a caseworker forgets the password, users can change it here by clicking “Forgot Password.” “Welcome User” in the upper right hand corner of subsequent screens (after login) also allows password changes.

7. Click on the “Forgot Password?” link and enter the username on the next screen and click on “Next”. (See Page 6)
Answer the Security Question & enter new Password to Reset

Username

Next  Cancel
8. Answer the security question correctly (set by the user when they changed their initial password) and enter the new password. “Confirm” and “Reset”. (TIP: Users should keep a record of their security questions and answers somewhere safe in case they are needed.)
Home Page – Dashboard

This page allows caseworkers to view messages from the program director.
Basic controls on all screens

1. The main menu is on the left of the screen.
2. Make the menu selection then enter data in the relevant field.
3. The “Filter” button searches for the relevant information.
4. To add a new record, click on the +sign.
5. An item can be highlighted the cursor hovering over an item.

6. Additionally, on all screens, the Cancel button returns users to the previous screen, and a red * indicates a required field.
(Please note, some fields do not have a red * but ALL fields should be completed.)
To add new client application or to help an existing client:

1. Choose the “Client Application” menu choice and this screen will appear.

2. To look up a client’s history, click on “EOC Year”, and then click on “ALL” from the drop-down menu. (TIP: Remember to change the “EOC Year” to “All” before you enter the client’s name)
3. Client information can be accessed at the “Client Applications” “Search Page” in a variety of ways by scrolling to the right:
   a. Applicant Last Name
   b. Applicant First Name
   c. Address 1
   d. City
   e. Zip Code
   f. Utility
   g. Agency
   h. EOC Year
   i. Account No.
   j. Application Date
   k. Amount Approved
   l. Application Status
4. By using “Filter” to the right of any of these fields enables the user to narrow the search.
5. Once it has been determined that the client is eligible for assistance click on the + to enter the new application.
6. Choose the utility vendor from the dropdown menu.
7. Enter the account number.
8. Some vendors do not give clients account numbers; if this is the case click on the “Account Not Required” field.
9. For XCEL, enter only the digits between the 2 dashes, **do not enter the 53 or those numbers after the last dash**.
10. Click Validate. (**TIP:** Unless the request is for firewood or propane, the client should have a bill in hand; the bill will have an account number. This account number **MUST be entered correctly here, as it cannot be entered or corrected later in the application process.**)
11. If the account number or utility is not eligible for assistance again this year, the caseworker will receive a warning message and the application process will be stopped.
12. To enter a new client after clicking on the + sign, enter the “Utility Vendor” and the “Account Number”.

13. Click “Search”. (See Page 12)

14. If no matching account holders are found, click “Next” and choose “Yes” to create a new account holder along with the application. (TIP: A warning will appear to make sure that a new account should be created.)

15. If the client is in the system but does not appear, click on “No” and widen the search with a first/last name only. (TIP: Please do NOT enter a common first name or a single character in any search field without having more search criteria in other fields.)
16. Just to make sure!
17. On the client application page, if the client is present in the results list, click the correct results row. (TIP: Remember, scrolling to the right will allow users to search for clients by other information.)

15. Enter data into required fields (red *). (TIP Please make sure to enter data into ALL fields even though they may not have a red *. Be sure to select the correct EOC year.)

16. Click “Submit” when complete.
17. **Remember that the utility name and utility account number entered on the first screen CANNOT be modified in the application.** If any incorrect information is entered, the caseworker should delete the application and reenter it correctly; search for the incorrect application on the “Client Application Search” screen, click on the application, and then click “Delete” (bottom right). (**TIP:** Applications can only be deleted and resubmitted **IF** they have not been paid (check # entered on “Utility Payment” screen).)

18. **NEW ITEM:** Income should be entered as a **MONTHLY** amount, not annual income
Paying Utilities

1. After applications have been entered, the agency may pay the utilities.
2. Click on the “Reports” menu choice.
3. Click “Unpaid Client Applications” and print a cover page for each utility.
4. To print the cover sheets use the printer icon OR click on the disk icon to download the information.

5. This appears:

- XML file with report data
- CSV (comma delineated)
- PDF
- MHTML (web archive)
- Excel
- TIFF file
- Word

6. Download in which ever function is required.
7. After the agency accounting department has written the checks, click on the “Cash Assistance” menu choice and then click on “Utility Payments”.

8. Select a utility vendor from the dropdown box, select applicants being paid, and enter check number for that utility vendor. Repeat until all vendors/applications/checks have been entered. (TIP: If the check number is not known, just put any number in that field)

9. If there are no applications or utility vendors to be paid, the report will be empty and no utility vendors will appear in the dropdown list.

10. Hold the control key to select multiple applications (check boxes) and then click on “Submit”.

11. Agency staff can also search by check # and update the check # if a utility payment is lost in the mail, etc. (TIP: This would not be possible if the same number was entered for every check.)
Create or Update Case Worker

1. This is a way to create a Case Worker; go to “Case Worker” menu choice; EOC does not have to be contacted to do this.
2. Choose + to create new record or search and select existing case worker in your agency. (TIP: This will only display caseworkers in your agency.)
3. Enter new user data or update data. If the user is new, the password will default to 123456. A new caseworker will be prompted to change password when s/he logs in for the first time.
4. If the caseworker needs to change contact information, they can do so by searching for the name on the Case Worker Search screen (above) and choosing their record (TIP: Preferred search method: enter last name, Enter. Click on user in the results set.)
5. Remember to click “Save” at the bottom right of the screen.
6. Users can only change their own password by using the “Forgot Password” function on the login screen. If there are problems with this, contact the EOC program manager, who has the ability to reset your password.
Reports

1. Information about Year-to-Date Disbursements (YTD Disbursement), Payment Details, and Unpaid Client Applications.
2. For the YTD Disbursement report, enter date parameters as required and print.
General Agency Information

1. If changes need to be made to general agency information, please make these changes before submitting a new grant application OR anytime during the year when changes to address or contact information occur.
2. Choose “Agencies” and then click your agency name.
3. Complete the updating of the agency information and click on “Save”.

4. The Employer Identification Number (EIN) is required for this screen and users will not be allowed to continue without it.
5. Users may also create a new user in the agency screen; scroll down to the “Add Case Worker” area on the “Agency Screen” and click “Add”.

6. Agency name will automatically populate; fill in other required fields and “Save”.
7. Username should not contain special characters or spaces and cannot be duplicated.
8. The new user default password is 123456 and the user will be prompted to change the default password at the first time of login. (See page 5)
Agency Grant Applications

1. Go to the “Agency Grants” menu choice.
2. Users may view previously submitted grant applications or saved grant information by clicking on the correct grant year row.
3. If changes to agency information need to be made, please do so in the “Agency” menu choice BEFORE the application is submitted.
4. To enter a new application click on + but only one application per grant year may be entered.

5. Grant applications can be saved multiple times within the grant application timeframe when data may be entered, BUT IT CAN ONLY BE SUBMITTED ONCE AND CANNOT BE UPDATED AFTER SUBMISSION.
6. Make the necessary updates and click on “Save”

7. Once the grant writer is satisfied with the data that is entered, click on “Submit”

8. **THE APPLICATION CAN ONLY BE SUBMITTED ONCE AND CANNOT BE UPDATED AFTER SUBMISSION**
FAQs

Client Application

1. The client says their name or address has changed.
   
   *Enter their utility, account # (if applicable) and validate. Next, enter the client’s previous name and/or address, if available, into the search area. If the old name or address appears, click on the name and choose “Update”.*

2. The client’s spouse applied for assistance on the same account last year, and now the other spouse is applying for help.
   
   *Search on the utility and account # (if applicable) and validate. The applicant should have a bill in hand. Please use the name that is on the bill. If the name on the bill has changed, create a NEW account holder. If the name on the bill is the same, leave the account holder information the same AND simply enter the spouse’s name in the Applicant Name section of the application.*

3. I forgot to enter the account number and I submitted the application.
   
   *The application will need to be deleted and reentered beginning with account validation. The utility and account # must be validated.*

   *(TIP: applications cannot be deleted once a check # is entered in the utility payment screen, so please be sure that all applications requiring account numbers (Xcel, ATMOS, etc.) have associated account #s before entering a check number in the Utility Payment screen.)*

4. When I try to enter an EOC year on the client application screen, there is no EOC year.
   
   *The agency grant application has not been approved yet. Please contact EOC with questions.*

5. How do we change our agency address in the system?
   
   *Go to “Agencies” menu choice, then select your agency name. Update and Save.*

Agency Grant Application

1. I cannot submit our agency’s grant application. The “Submit” button is not available.
   
   *Either the grant application period is closed OR the grant has already been submitted.*

Reports

1. The report requested did not return data.
   
   *Check your parameters (date ranges, etc.) and make sure they are valid.*
The data used in this document are for example purposes only and should not be used for training or live data entry for any reason.

ENERGY OUTREACH COLORADO
225 East 16th Avenue
Suite 200
Denver, Colorado 80203-1612
Telephone: 303-825-87501
Fax: 303-825-0765
Website: www.energyoutreach.org