How to Use the Hancock Database

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How to Add a New Application to Hancock

1. Log in to Hancock Software, where you will see the following:

2. Click on ‘New Application’ where the following will appear:

3. Enter the applicant’s ‘First Name’ and ‘Last Name’ to run a search for EOC applicants who have received an EOC assistance (after you have searched the old EOC database, which must be done until 10/1/22 for all applicants!).

4. Check off ‘Entire State’.

Note: the ‘Duplicate Type’ dropdown would only be used if a variety of applicants with that same name, are found when you ‘Search’. The ‘Duplicate Type’ dropdown simply adds a new field to this ‘Finding Client’ search, to narrow search results for common names. You can search by the ‘Address’ or ‘Family Name and DOB’ to narrow search results.
5. Click ‘Search’ where the following ‘No record matches!’ message may appear if no applicant by that name has been provided an EOC assistance. If you receive this ‘No record matches!’ message, skip to step 7 in ‘How to Add a New Application to Hancock’.

Note: If an applicant by that same searched name exists in the EOC database, you will see the following ‘# records match!’ message.

6. If you see the following ‘# records match!’ message, click ‘View List’ to learn if this same applicant has already received an EOC assistance for the bill you plan to assist with. If this applicant has already received assistance for this same bill, please ensure to cancel any EOC pledges made to the utility company!

7. If the ‘Search’ results do not produce any client results, click ‘Create New’.
8. Complete the fields in ‘Contact’ in the ‘Application Info’ tab. Tips and tricks are below!

   a. The applicant’s first and last name will automatically populate from your Client Search.
   b. You cannot use (parenthesis) -dashes- or .periods. to enter a phone number. Simply enter all digits and Hancock will automatically reformat the phone number.
   c. The ‘Application Status’ and ‘Agency’ fields cannot be changed.
   d. City and County options are limited to the area your agency serves. You must select the City/County from the drop-down menu that will appear to make this information save.
   e. When a text box is yellow, this is the field being edited.
   f. Checking off ‘Mailing Same As Home Address’ will automatically update the mailing address to match the ‘Home Address’.
   g. Any fields with a red asterisk* are required fields.
   h. ‘Save’ will save the application information.
How to Update the ‘Family’ Field for the Primary Applicant

1. Expand the ‘Family’ field of the Application by clicking anywhere in the grey bar.
   a. Important Note: even if there is only one member of the household, the ‘Family’ field is where annual income, date of birth, ethnicity, and employment status is reported, so this field must always be expanded and updated!

To reveal the following:

Note: the number of ‘Occupants’ will automatically update as you add household members as described in the next section of this manual.

9. Enter the ‘Annual Household Income’ (not the monthly household income).
   a. We understand that annual household income fluctuates, so to report the ‘Annual Household Income’ for applicants, simply collect their current household monthly income for the month they are completing their application and multiply that number by 12.

10. Select Income Self-attested or Income Verified (based on what is collected, but income verification is not required).

11. Hover over the applicant’s name, to highlight the applicants name in yellow, as seen below:

12. **Double click** the applicant’s highlighted name.
13. Enter the applicant’s Date of Birth.
   a. **Note:** you **cannot** enter a birth year in the two-digit format (1/27/77), or you will see the following error message:

   ![Error Message]

   Birth years must be entered in the four-digit format (1977, 1990, 2001, etc.) and birth months and birth days can be entered in single- or double-digit formats (4/9/1977, 9/02/1990, 01/07/2001).

   Full birthdays can be entered as:

   - 4 9 1977 (must include spaces)
   - 4.9.1977
   - April 9, 1977
   - 4-9-1977
   - 4/9/1977

   **Note:** the ‘First Name’, ‘MI’, and ‘Last Name’ will reflect the information entered in these fields from the Contact section of the application.

   The EOC applicant is the ‘Primary Applicant’. Hancock will automatically reformat the Date of Birth to the 4/9/1977 format.
14. Record the applicant’s Gender according to the following options:
   a. Note: the Primary Applicant’s Gender cannot be ‘none’, or you will not be able to submit the application in Hancock.

15. Record the applicant’s Ethnicity according to the following options:
   a. Note: the Primary Applicant’s Ethnicity cannot be ‘none’, or you will not be able to submit the application in Hancock.

16. Record the applicant’s Race according to the following options:
   a. Note: the Primary Applicant’s Race cannot be ‘none’, or you will not be able to submit the application in Hancock.
   b. You may need to scroll within the Race dropdown menu to find the reported option.

17. Record the applicant’s employment status according to the following options:
   a. Note: the Primary Applicant’s ‘Employment Status’ cannot be ‘none’, or you will not be able to submit the application in Hancock. Rather, select ‘Unemployed’.
18. Once all fields are complete, click ‘Save’.
How to Add Household Members

1. Expand the ‘Family’ section, then click ‘new’ as seen below:

   To reveal the following:

   2. Enter the ‘First Name’, ‘Last Name’, and ‘Date of Birth’ for the next member of the household. You do not need to enter the ‘Gender’ ‘Ethnicity’ or ‘Employment Status’ for any members of the household who are not the ‘Primary Applicant’.
      a. If you do not have the exact Date of Birth for all members of the household, estimate their birth year by the age listed on the application, and then input their Date of Birth as 1/1/estimated birth year.

3. Follow steps 1 and 2 to add every current member of the household. Every household member must be entered to ensure an accurate count of the household occupants and confirm household eligibility.
How to Remove Household Members

1. From the ‘Family’ section of the application, check off the box next to the household member you want to remove, as seen below:

![Family section of the application]

2. Click ‘Remove’.

   ![Warning pop-up]

   Where the following pop-up will appear:

   3. Click ‘Yes’.

   a. Note: you will see the following pop-up if you are attempting to delete the ‘Primary Applicant’.

   ![Error pop-up]

   4. Click ‘OK’. 
How to Update Demographics Information

1. Expand the ‘Demographics’ section.

To reveal the following:

2. Identify the ‘Application Method’ according to one of the following options: In Person, Mail, Email, Fax.

3. The ‘Applied Date’ will automatically reflect the day that you began entering this EOC application into Hancock. Updating this date is not required.

4. Update the ‘Building Type’ according to the following options: Mobile Home, House, Apartment, Duplex/Triplex/Fourplex, Townhouse.

5. Update the ‘Owner Type’ to renter or owner. If an applicant owns a mobile home, but rents their mobile home lot, these applicants are considered renters!
6. Update each Question **not** by checking them off, but by hovering over the field under ‘Answer’ here:

When hovering over the Question field you are updating, the field will highlight in yellow as seen below:

7. Click the highlighted field under ‘Answer’ to make a dropdown box appear, where you can record the response as seen below:

8. Click anywhere inside the blue Select... rectangle under ‘Answer’ or on the drop-down arrow to select the response for each question. Once the response is selected, the ‘Answer’ field will update from a **blue outline** to a **red outline**.
   a. For the ‘Have any of these situations applied to you in the past? Select all that apply.’ field, select every situation that has occurred for the applicant. **If none have occurred, you must select ‘None’**.
   b. Answers in the ‘Have any of these situations applied to you in the past? Select all that apply.’ box will appear as the following:
   
   c. To remove any situation, click the ‘x’ next to the situation.
d. Once you click outside the ‘Have any of these situations applied to you in the past? Select all that apply.’ answer field, this field will update to the following sentence structure:

I went without food so that I could pay my energy bill. Went without medication(s) or medical care to pay bill. Set thermostat too low/high to save on utilities

e. If the applicant is in process of applying for LEAP this year and was approved for LEAP last LEAP season, select ‘Received in the last 12 months’ for ‘LEAP Status?’.

f. If the household ‘Received [LEAP] in the last 12 months’ select ‘N/A’ for ‘If Denied or ineligible LEAP, what is the reason?’.

g. Even if the household has not been ‘financially impacted by COVID-19’ you must always report yes or no!

i. With this new EOC database, we will not be asking for specific COVID-19 hardships. But collecting the specific COVID-19 hardship information is always required (if applicable) and must be on record with the physical applications collected at your agency, in case of an EOC audit. Collecting specific COVID-19 hardships is also particularly important (and required) for ERA assistances!

9. Scroll in the ‘Demographics’ section and identify every benefit received in the household by checking off every benefit received.

a. Note: if the household receives no benefits, you must select ‘None’.

10. You will not be able to update the following information:

Rather, this information will update as EOC assistances are approved by EOC!
How to Add Utility Account Information

1. Expand the ‘Utility Account Information’ section.

   To reveal the following:

   - **Primary Heating Source**

2. Select the ‘Primary Heating Source’ according to the following options: Electricity, Gas, Propane, Wood, Pellets, Coal, Kerosene, Oil, Water, Gas & Electricity.

3. Add the utility account information by clicking New.

   To reveal the following:

4. Select the ‘Fuel Vendor’ by beginning to type or by selecting the ‘Fuel Vendor’ from drop down menu.
a. Note: For utility companies that provide multiple types of energy, ensure you select the correct type of energy.
b. Each ‘Fuel Vendor’ (utility company) has a specific service area based on Counties, as do EOC partner agencies. Whatever county is entered for the applicant’s address will determine the Fuel Vendors visible to you. See the FAQ document for what to do if you do not see the utility company you need to select in this ‘Fuel Vendor’ list.

Example: La Plata Electric Association (LPEA) only serves customers who live in Southwestern Colorado. An EOC Partner Agency that only serves applicants in Boulder County, will never see LPEA as a ‘Fuel Vendor’ as the applicant falls outside of LPEA’s service area. See FAQ document for additional information!

5. Enter the ‘Account Number’.
   a. Note: if you are providing an Xcel assistance, only use the 7-10 digits between the dashes.

6. Enter the total ‘Amount Owed’.

7. Enter the account holder information by either:
   a. Selecting Same as Applicant (if applicable).
   b. Entering the account holders first and last name if the applicant is not the account holder.

**Energy Consumption**

**Fuel Vendor**

Xcel Energy - Gas

**Account Number**

8746283698

**Amount Owed**

423.56

[ ] Same As Applicant

**Account Holder First Name**

**Account Holder Last Name**

Comment

8. If the applicant is not the account holder, list the relationship to the account holder in the ‘Comment’ section.

   a. Note: the ‘New’ button will be greyed out until you select a ‘Fuel Vendor’.
To reveal the following:

Note: The ‘Date’ will be the date you are entering the ‘Energy Service Status’ information into Hancock. Updating this date is not required.

10. Click in the rectangle under ‘Crisis – Resolution – Severity’ Where the following will appear:

11. Select the ‘Crisis – Resolution – Severity’ according to the following options:

- Disconnect Notice – Prevented – Energy Crisis
- Service is currently shut off – Restored – Life Threatening
- Past due balance – Prevented – Energy Crisis

These options are specific to non-bulk fuel bills

- Tank is empty OR Out of wood/pellets/coal – Restored – Life Threatening
- Tank is at 30% OR low on wood/pellets/coal – Prevented – Energy Crisis

These options are specific to bulk fuel bills

For more information on ‘Crisis – Resolution – Severity’ options, please reference the FAQ document.

12. Click ‘Save’.

13. To add any additional EOC assistances, follow steps 3-12 in “How to Add Utility Account Information”.
Updating the Document Section in Hancock

1. Expand the ‘Document’ section, as seen below:

   ![Image of Document Section]

To reveal the following:

2. Hover over the ‘Photo ID’ field, where this field will highlight yellow, as seen below:

   ![Image of Photo ID Highlighted]

3. Once highlighted, double click on the field to reveal the following:

   - The ‘Document’ field is a reminder of which document you are updating the ‘Document Status’ for.

     The ‘Document Status’ will automatically be marked as ‘Complete’ when you open a Document field.

     The ‘Comment’ section is where you can include comments if you would like to highlight anything special about the document collected, but this is not required!

     The ‘Revised Date’ will be the date that you first began entering this application into Hancock. You do not need to update this date.
4. The ‘Document Status’ will automatically be ‘Complete’ once you open the document field
5. Add any applicable comments, but comments are not required
6. Click ‘Save’ to save the ‘Document Status’ and exit out of the Photo ID Document Section
7. Follow steps 2-6 in “Updating the Document Section” to add the ‘Latest Bill’
   a. For bulk fuel assistances (propane, firewood, pellets, etc.) often the bill or invoice is not produced until
      the EOC payment is received, and the fuel is delivered. For bulk fuel bills, mark these ‘Document
      Statuses’ to ‘Complete’ and add a quick comment that the bill/invoice is produced after delivery.
8. Follow steps 2-6 in “Updating the Document Section” to update the ‘Consent to Disclose Utility Customer...’.
   a. **Note: If the assistance being provide is not for one of the four regulated utility companies (Xcel
      Energy, Atmos Energy, Black Hills Energy, or Colorado Natural Gas), simply flip the ‘Document Status’
      to ‘Not Required’ and save.**
9. Follow steps 2-6 in “Updating the Document Section” to update the ‘EOC Application’.
10. Follow steps 2-6 in “Updating the Document Section” to update the ‘COVID Survey’.
    a. If the applicant has reported that they have not been affected by COVID-19 do not update the
       ‘Document Status’ to ‘Not Required’. A COVID-19 survey is always required, and thus should always
       be marked as ‘Complete’. 
Adding Comments to Hancock

1. Comments are not required, but this will be where you want to briefly highlight details about an application, if applicable. If you do not need to update the ‘Comments’ field, skip to the next section called “Qualifying an EOC Applicant in Hancock”.

If you are adding comments, expand the ‘Comments’ field:

To reveal the following:

2. Add any applicable comments in the ‘Comment’ field.

3. Click save as seen below:
Once saved, the comment will reflect the following:

4. Add as many comments as needed.
   a. Note: you cannot delete comments once saved.
   b. Note: clicking ‘Show Comments History’ will produce a list of all comments for this application.
Qualifying an EOC Applicant in Hancock

Qualifying an EOC applicant in Hancock is a quick check that each field and document status has been reported in Hancock. **You will not be able to submit an EOC application if you cannot qualify the application.**

1. Click on the ‘Benefits’ tab as seen below:

   ![Benefits tab](image1)

To reveal the following:

2. Click ‘Qualify’.
   
   a. Note: if you are missing any documentation or information on the application, when you click ‘Qualify’ you will receive an error message. For more information about error messages when clicking ‘Qualify’ please see addendum.

Once you click ‘Qualify’ and there are no errors to address, the following Utility Account information will appear:

3. Double click under ‘Benefit’.

   ![Qualified Allocation](image2)

Where the following will appear:

4. Update the ‘Base’ dollar amount to the total amount of EOC assistance you are providing for this applicant, including **each** utility assistance amount.
   
   **Example:** If you are providing a $375.45 Xcel Electric assistance and a $918.33 propane assistance, you would list 1,293.78 in the ‘Base’ amount field.

   ![Base amount](image3)
5. Click ‘Save’.

6. Once you click ‘Save’ the ‘Benefit’ amount will automatically update to the ‘Base’ amount, as seen below:
   a. The amount next to the first utility assistance entered, will also update to the ‘Benefit/Base’ amount.

   ![Qualified Allocation](image1)

   b. If you only have one assistance to provide, skip to step 7 in “Qualifying an EOC Applicant in Hancock”

   c. If you have a second assistance (and/or third for City of Aurora Water assistances in addition to two different fuel assistances) to provide, add up the entire amount of EOC assistance you are providing for all utility assistances for this applicant, then update this total amount in the ‘Benefit/Base’ field. Then, click ‘Add’ to select the second (and/or third, if applicable) fuel assistance.

   ![Qualified Allocation](image2)

   d. Once you click ‘Add’, the following will appear:

   ![Qualified Allocation](image3)

   e. Select the second ‘Vendor’ from the dropdown that appears, which will only list the bills with which you are assisting.

   f. Double click under ‘Amount’ to make an editable field appear.
      i. Enter the amount of EOC assistance you are providing for each respective utility assistance, as seen below, which must equal the total amount of assistance you are providing for all energy assistances if you are providing more than one utility assistance.
7. Click ‘Save’.

Where the ‘Qualified Allocations’ section will update to the following:
Certifying an EOC Application in Hancock

1. Once an applicant is Qualified, check off the assistance(s) being provided as seen below. For agencies with ERA funds, please reference the “Certifying an EOC Application in Hancock with ERA Funds” in the Addendum.

   ![Qualified Allocation Table]

   - Allocation: 2020 Bill Pay
   - Benefit Date: 01/11/2022
   - Additional Benefit: $0.00
   - Benefit: $423.56
   - Balance: $0.00
   - Max Remaining: $2,176.44
   - Vendor: Xcel Energy - Gas
   - Fuel Type: Gas
   - Quantity: 423.56
   - Unit Cost: $423.56
   - Amount: $423.56
   - Service Date: 01/11/2022
   - Agency Approval Date: 01/11/2022
   - Approved By: [Name]
   - Comment: [Comment]
   - Credit Notification: [Credit Notification]
   - Payment Date: 01/11/2022

2. Click ‘Certify’.

   ![Certified Allocation Table]

   Once certified, the ‘Qualify’ and ‘Certify’ buttons will be grayed out as seen below:

   ![Grayed Out Buttons]

   If any corrections need to be made after an application is certified, but before an application is approved for payment, simply click on ‘Undo Certify’. Make any corrections to the application, then follow the steps in ‘Qualifying an EOC Applicant in Hancock’ and ‘Certifying an EOC Application in Hancock’. Once the payment is approved by EOC (occurs most Thursday mornings, holidays permitting) you cannot ‘Undo Certify’ to make changes to the application.

   For any questions or troubleshooting, please consult the FAQ document. If the FAQ document does not answer your question, please consult your agencies EOC Program Liaison.
Confirming if an EOC Application has been Paid

EOC approves applications for payment every Thursday morning for checks to be mailed the following Monday.

a. Note: EOC will approve any application Certified. We assume that if an assistance is entered into Hancock, that the applicant qualifies for assistance. When an application is approved for payment by EOC, paid applications cannot be edited or removed.

2. From the Hancock homepage, click on the ‘Payment’ tab as seen below:

Where you will see the following:

3. To search for an EOC approved applicant, by enter any piece of information related to their assistance. Recommended searches would be by last name or account number.
   a. Note: to search by account number, scroll right to find this field, or re-order your ‘Payment’ page view per ‘Customizing Information Fields’ in the Addendum section, below.
   b. Note: only paid applications entered by your agency will be visible in the ‘Payment’ tab.
Addendum
Certifying an EOC Application in Hancock with ERA Funds

1. Once an applicant is Qualified, the following will appear:

2. Follow the steps per the ‘Certifying an EOC Application in Hancock’ but enter the amount pledged information in the ‘2022 ERA’ section not the ‘2022 Bill Pay’ section, as seen above.

8. If an applicant is a COVID-19 affected renter and you want to use your agencies ERA funds to provide an EOC assistance, check off the following for each utility assistance:
   a. Note: **DO NOT** check off ‘Allocation’ or you will select both the 2022 ERA and 2022 Bill Pay funds to provide assistance. You will see the Allocation box fill with blue (but not checked off) when you check off ‘2022 ERA’.
The following boxes must be checked off to provide an ERA specific assistance:

9. Click ‘Certify’.

<table>
<thead>
<tr>
<th>Allocation</th>
<th>Benefit Date</th>
</tr>
</thead>
<tbody>
<tr>
<td>2022 ERA</td>
<td></td>
</tr>
</tbody>
</table>

<table>
<thead>
<tr>
<th>Vendor</th>
<th>Fuel Type</th>
<th>Quantity</th>
<th>Unit Cost</th>
</tr>
</thead>
<tbody>
<tr>
<td>Xcel Energy - Electricity</td>
<td>Electricity</td>
<td>0</td>
<td></td>
</tr>
</tbody>
</table>

If you check off either of these boxes, the other will automatically be checked off.

= do not check off
Once certified, the ‘Qualify’ and ‘Certify’ buttons will be grayed out as seen below:

10. If any corrections need to be made after an application is certified, but before the payment is approved, simply click on ‘Undo Certify’ and make any corrections to the application. Then follow the steps in ‘Qualifying an EOC Applicant in Hancock’ and ‘Certifying an EOC Application in Hancock’. Once the payment is approved by EOC (occurs most Thursday mornings, holidays permitting) you cannot ‘Undo Certify’ to make changes to the application.
Adding Additional Utility Assistances to Paid Applications

Some applicants may apply for assistance twice in the same EOC grant year. If an applicant is approved for a bill in November 2021 (example: Black Hills Energy) and reapplies for a second assistance in April 2022 (or a third assistance if one of their bills is a City of Aurora Water bill):

1. Search for the applicant by clicking on the ‘New Application’ button on the Application homepage.
2. Once you search for this applicant, you will see a ‘# records match’ notification, as seen below:

![Finding Client](image1)

a. Note: if there are many applicants by that same name, you can scroll right in the ‘View List’ search results to confirm which applicant you are providing an additional assistance.
3. Once you find the applicant you are adding an additional EOC assistance for, hover your mouse over their name to highlight them, then double click anywhere in the highlighted section to open their application.

![View List](image2)
4. Once a paid application is opened, you will see the following grayed out application information:

5. Click ‘Change’ where the Application will update to the following view:

6. Confirm that the contact information (email and phone number) is correct in the ‘Contact’ section.
7. Update the Annual Household Income in the ‘Family’ section, if applicable.
8. Scroll to and expand the ‘Utility Account Information’ section and click ‘New’.
9. Add the second (and/or third, if applicable, for Aurora Water assistances) utility account you have pledged EOC funds. Refer to steps 2-12 in the “How to Add Utility Account Information” section if needed.

10. Once complete, click on ‘Confirm Changes’ as seen below:

Note: once you ‘Confirm Changes’ Hancock will automatically check if this applicant qualifies based on any updates, including confirming the applicant still qualifies based on any changes to their Household Annual Income. If there are no errors in qualifying this applicant, you will see the following popup:

11. Go to the ‘Benefits’ tab. Update the ‘Benefit’ amount to the total amount of assistance you are providing in addition to the amount of assistance that was already provided. Double click under ‘Benefit’ and updating the ‘Base’ amount. For more details, refer to steps 3-5 in “Qualifying an EOC Applicant in Hancock”.
   a. Example: if a $500 Black Hills assistance was already provided and a second Propane assistance for $1,000 is being entered into Hancock, update the benefit amount to $1,500.

12. Click ‘Add’ as seen below:
13. Select the second utility company and update the ‘Amount’ to the EOC amount you have pledged to this utility company.

14. Once complete, click ‘Save’ and the utility assistances will update to the following:

15. Once saved, the second (and/or third, if applicable) assistances are submitted to be paid and you do not need to ‘Qualify’ or ‘Certify’ again.
How to Upload Documents to Hancock

With this new EOC database, application materials can be uploaded. These application materials will only be visible to you, your agency, and EOC staff and will not be shared among EOC partner agencies. Uploading documents is not required at this time.

1. Expand the ‘Document’ field.

   To reveal the following:

   **Important Note**: This field will always populate even if you are not providing an EOC assistance for one of the four regulated utility companies (Xcel Energy, Black Hills Energy, Colorado Natural Gas, or Atmos Energy) as identified in ‘Energy Consumption’. If the assistance being provide is not for one of the four regulated utility companies (Xcel Energy, Atmos Energy, Black Hills Energy, or Colorado Natura Gas), simply flip the ‘Document Status’ to ‘Not Required’ and save.

2. Upload the applicant’s Photo ID by double clicking on the Photo ID field to reveal the following:

   - The ‘Document’ field is a reminder of which document you are updating for the ‘Document Status’.

   The ‘Document Status’ will automatically be ‘Complete’ when you open a Document field.

   The ‘Comment’ section is where you can include comments if you would like to highlight anything special about the document collected, but this is not required!

   The ‘Revised Date’ will be the date that you first began entering this application into Hancock. You do not need to update this date.

3. Click on ‘Attach Document’ to reveal the following:
4. Click on ‘Select file’ which will open a file dialog box.
5. Find the correct file you need to upload.
   a. Note: if you save applicant documents in one place, and arrange the files by date created, you can easily find and upload all of your applicant’s EOC application documents.
6. Once the correct file has been found, select it, and click ‘Open’ in the file dialog box where the following will appear:
   Note: if the wrong file is selected in your dialog file box, you can simply click ‘Select file’ again to replace the incorrect file.

7. Once the correct document is found and opened from the file dialog box, click ‘Upload’ to reveal the following:
   Note: If you have IDs for the other household members you can attach them by following steps 3-7 in ‘How to Add Documents to Hancock’, but only the applicant’s ID is required to be uploaded.

8. Once the file(s) have been attached, click ‘Save’.
9. Upload the bill for the assistance being provided by following steps 3-8 in ‘How to Add Documents to Hancock’.
10. Upload the consent form (if applicable) for the assistance being provided by following steps 3-8 in “How to Add Documents to Hancock”. If you are providing an assistance for an unregulated utility company (any utility company except Xcel Energy, Black Hills Energy, Colorado Natural Gas, or Atmos Energy) skip to the next step!
   a. Note: if the applicant is not the account holder, the applicant must be authorized on the account to sign the consent form. Otherwise, the account holder is required to sign the regulated consent form.
11. Upload the completed EOC application by following steps 3-8 in “How to Add Documents to Hancock”.
12. Upload the completed COVID-19 survey by following steps 3-8 in “How to Add Documents to Hancock”.
   a. Note: even if an applicant reports that they are not affected by COVID-19, a COVID-19 survey must be collected and uploaded.
How to add Documents to Hancock for a Paid Application

EOC may request that you upload a document to Hancock after an application has been paid, so EOC can assist the household with a different service offered through EOC, like signing the applicant up for a Community Solar Garden.

1. To upload a document on an application that has already been paid, expand the Document section.

To reveal the following:

![Document section](image)

2. Click ‘Change Documents’ where the following pop-up will appear:

![Success pop-up](image)

3. Upload the requested document per the Addendum instructions in “How to Upload Documents to Hancock”.
Reading the Application Page

a. Allows you to customize what information fields you see on the ‘Application’ page
b. Allows you to run reports
c. Allows you to check a certified application’s Payment status
d. Where to click to add a new EOC application
e. Where your Hancock username will be displayed
Customizing Information Fields

Hancock allows you to customize the way you see your ‘Application’ page in variety of ways.

1. Click on the ‘Column Chooser’ icon.

To reveal the following:

Note: you can Hover your mouse inside the ‘Column Chooser’ box to make a scroll bar appear, to scroll to view every Column Chooser option.

OR

you can hover over any corner of the Column Chooser box to drag the Column Chooser box, to make the list longer.

2. There are Column Chooser options for almost every information field identified in an EOC application. Customize what you want to see available on your application page, based on your agency’s needs! These options can be changed at any time and running a report will capture everything entered into the application, so you do not need to worry about losing any data with your Column Chooser choices. Chose the data fields that you want to be visible on your ‘Application’ page.

   a. Note: each Hancock user must change their own Column Chooser options. This is to say that the Program Liaisons Application tab fields will not update for their staff as changes are made.

Highly recommended choices:

- Application Status
- Certified Date
- Certifier
- Client Number
- City
- County
- Created Date
- First Name
- Home Address
- Intake User
- Last Name
- Phone
- ZIP

Note: as you begin to uncheck fields, you will see them “disappear” from the Application page behind the Column Chooser box.
3. You must click ‘Save Profile’ to make your preferred information fields save.

Once saved, the following pop-up will appear:

4. Click ‘OK’.
Customizing the Placement of Information Fields

1. Although this is not required, it may be helpful to customize the placement of the information fields. To do so, hover over the information field you want to move.

2. Click **and** drag the information field to where you want to move it. A blue line will appear as you drag the information field, which will tell you exactly where this field will be relocated once you drop the information field, as seen below:

3. Rearrange all information fields as you want them to be displayed (if applicable).

4. You must click ‘Save Profile’ to make your reordered information fields to save.

Once saved, the following pop-up will appear:

5. Click ‘OK’.
Customizing the Alphabetical or Chronological Order of Information Fields

1. Simply click on any Information Field name to re-arrange your entire application page by that field.
   a. To arrange an Application Page alphabetically by name, click on the first or last name field.
      i. The arrow facing up to the right of the information field will produce an A-Z list of applications.

   b. To arrange an Application Page by Z-A, click the first or last name information field again, where you will see an arrow facing down to the right of the information field.

2. To view a chronological order of applications (which is highly recommended) to view the most recent applications entered into Hancock, arrange the ‘Created Date’ with the arrow facing down as seen below.

3. You must click ‘Save Profile’ to make your preferred Alphabetical or Chronological choices save.

Once saved, the following pop-up will appear:

4. Click ‘OK’.