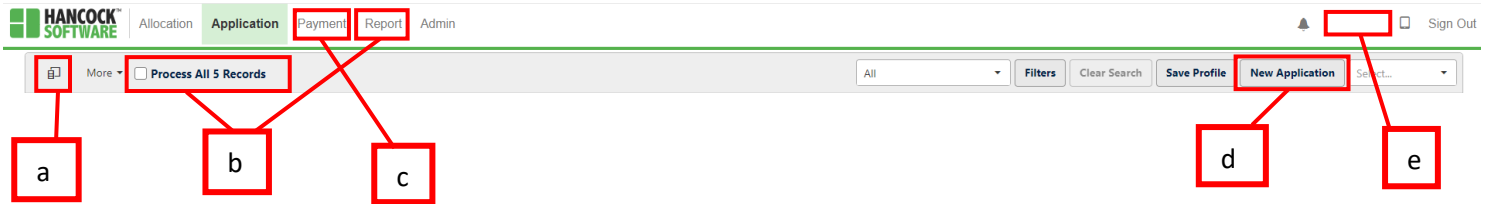


Program Liaison Administrator Access Guide to Hancock

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Reading the Application Page

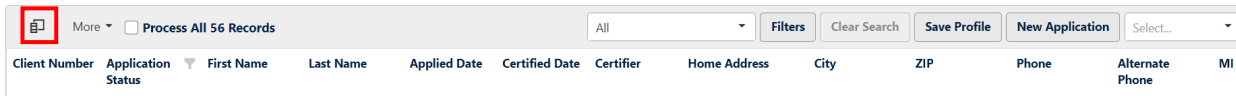


- a. Allows you to customize what information fields you see on the 'Application' page
- b. Allows you to run reports
- c. Allows you to check a certified application's Payment status
- d. Where to click to add a new EOC application
- e. Where your Hancock username will be displayed

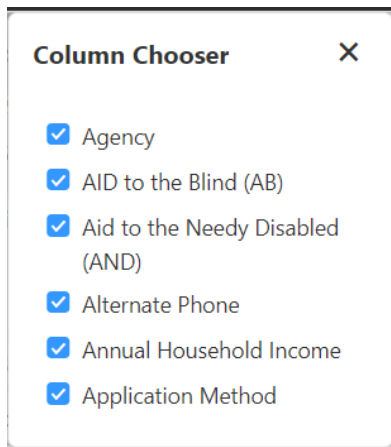
Customizing Information Fields

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

1. Click on the 'Column Chooser' icon



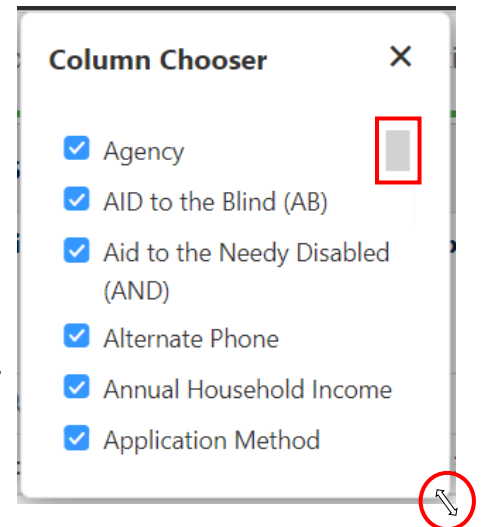
To reveal the following:



Note: you can hover your mouse inside the 'Column Chooser' box to make a scroll bar appear and scroll to view every Column Chooser option

OR

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



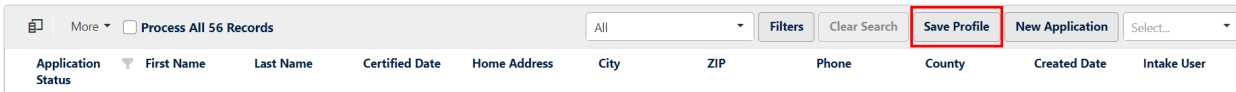
2. There are Column Chooser options for almost every information field identified in an EOC application. Customize what you want to see available on your application page, based on your agency's needs! These options can be changed at any time and running a report will capture everything entered into 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: a change made to the Column chooser options by a Program Liaison will not make changes for your entire agency. Each user will need to select their own Column Chooser options.

Highly recommended choices:

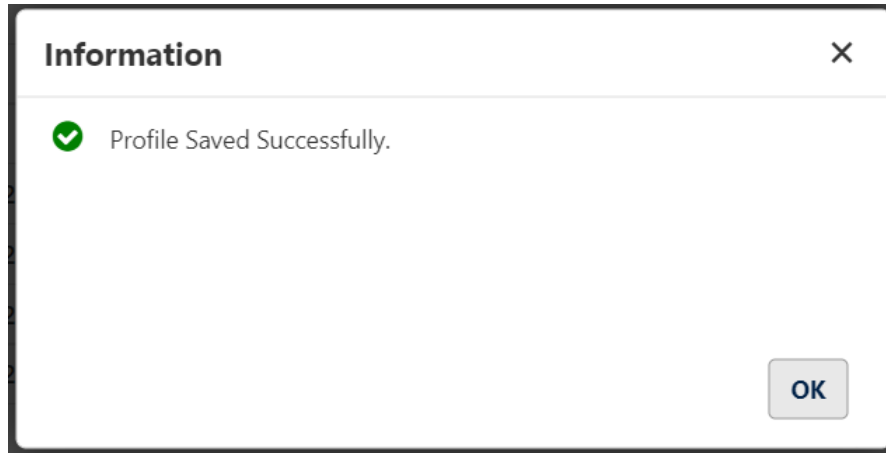
- Application Status
- Certified Date
- Certifier
- Client Number
- City
- County
- Created Date
- First Name
- Home Address
- Intake User
- Last Name
- Phone
- ZIP

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 save the changes for your preferred information fields.



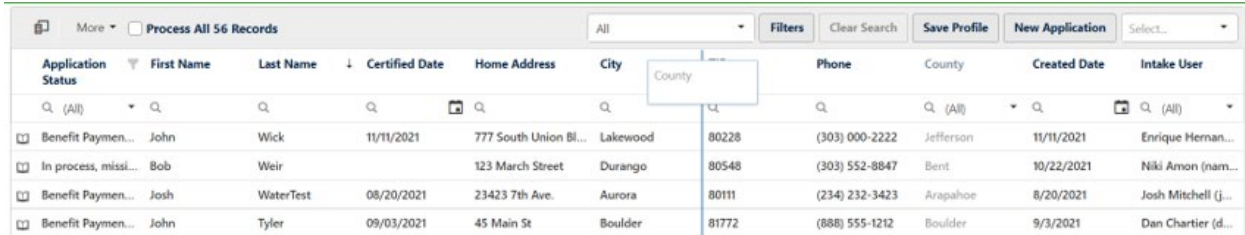
Once saved, the following pop-up will appear:



4. Click 'OK'

Customizing the Placement of Information Fields

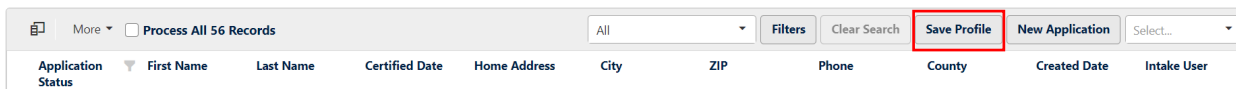
1. Although this is not required, it may be helpful to customize the placement of the information fields. To do so, hover over the information field you want to move.
2. Click **and** drag the information field to where you want to move it. A blue line will appear as you drag the information field, which will tell you exactly where this field will be relocated once you drop the information field as seen below:



A screenshot of a data management interface showing a table with columns: Application Status, First Name, Last Name, Certified Date, Home Address, City, County, Phone, County, Created Date, and Intake User. A mouse cursor is hovering over the 'County' column header, and a blue line indicates the field is being dragged to a new position between 'City' and 'Phone'.

Application Status	First Name	Last Name	Certified Date	Home Address	City	County	Phone	County	Created Date	Intake User
Benefit Paymen...	John	Wick	11/11/2021	777 South Union Bl...	Lakewood	80228	(303) 000-2222	Jefferson	11/11/2021	Enrique Heman...
In process, missi...	Bob	Weir		123 March Street	Durango	80548	(303) 552-8847	Bent	10/22/2021	Niki Amon (nam...
Benefit Paymen...	Josh	WaterTest	08/20/2021	23423 7th Ave.	Aurora	80111	(234) 232-3423	Arapahoe	8/20/2021	Josh Mitchell (j...
Benefit Paymen...	John	Tyler	09/03/2021	45 Main St	Boulder	81772	(888) 555-1212	Boulder	9/3/2021	Dan Chartier (d...

3. Rearrange all information fields as you want them to be displayed (if applicable).
4. You must click 'Save Profile' to save your reordered information fields.



A screenshot of the same data management interface. The 'Save Profile' button in the top right corner is highlighted with a red rectangular box.

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

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 rearrange 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

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

- ii. 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

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

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

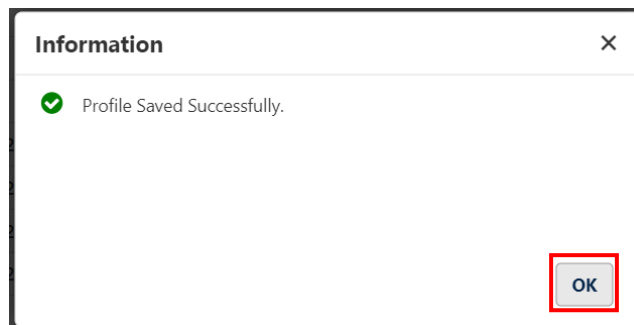
2. To view a chronological order of applications (**which is highly recommended**) starting with the most recent application entered into Hancock and arrange the 'Created Date' with the arrow facing down as seen below:

Application Status	First Name	Last Name	Certified Date	Home Address	City	County	ZIP	Phone	Created Date	Intake User
Benefit Paymen...	Yogi	Bear	01/13/2022	100 Jellystone Way	Denver	Denver	80223	(111) 111-1111	1/13/2022	Josh Mitchell (j...

3. You must click 'Save Profile' to save your preferred Alphabetical or Chronological choices.

More	<input type="checkbox"/> Process All 56 Records	All	Filters	Clear Search	Save Profile	New Application	Select...			
Application Status	First Name	Last Name	Certified Date	Home Address	City	ZIP	Phone	County	Created Date	Intake User

Once saved, the following pop-up will appear:

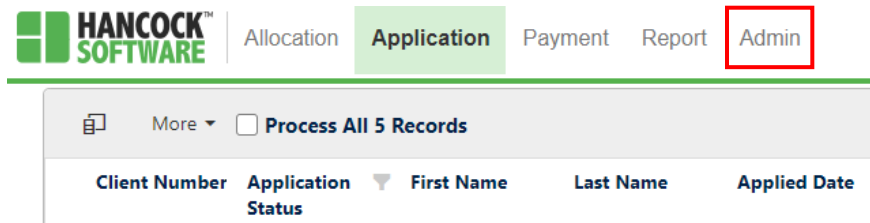


4. Click 'OK'

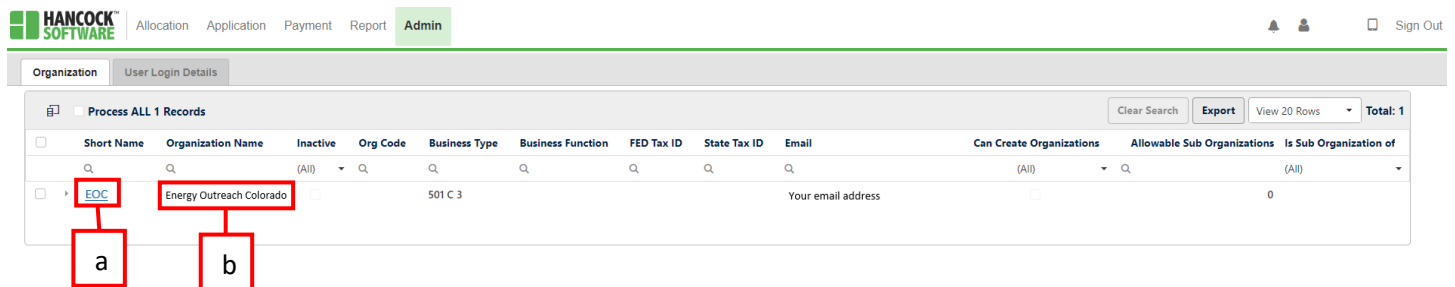
Creating New Hancock Users

With Hancock, creating new EOC database users will be completed by EOC Program Liaisons, rather than by EOC. EOC will reach out monthly to confirm if all of the Hancock users currently active for your agency are still employed at your agency, but it is also your responsibility as an EOC Program Liaison to revoke Hancock access for any staff (employees or volunteers) who are no longer working at your agency. Not revoking Hancock access for any staff no longer with your agency is a serious security concern.

1. Log into Hancock.
2. Click on the 'Admin' tab as seen below:

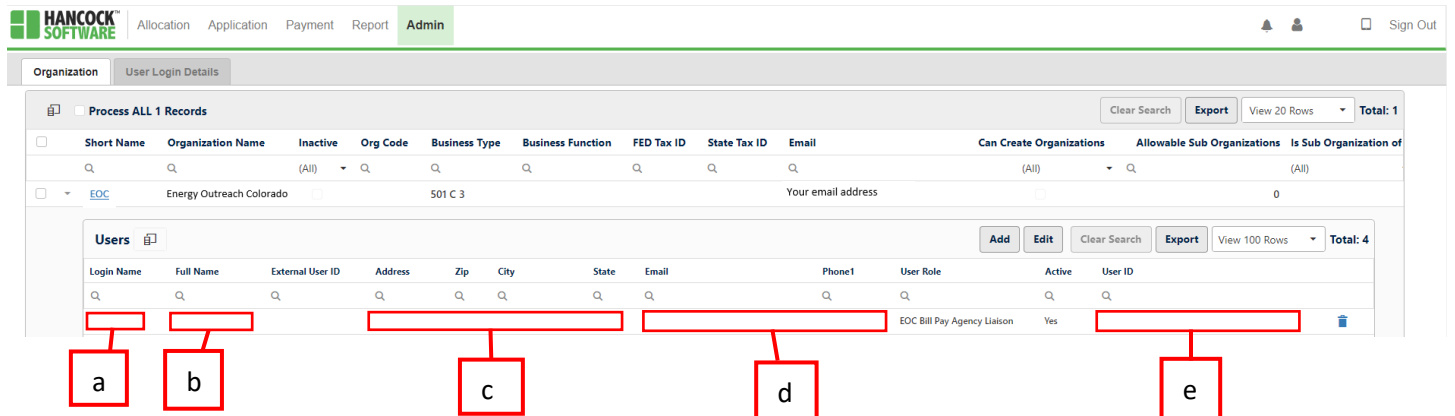


To reveal the following:



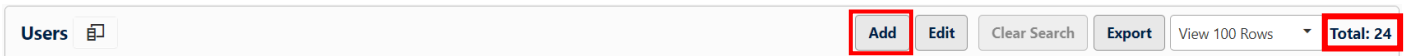
- a. Your agency's specific 'Short Name' will be listed here (not EOC).
- b. Your agency's specific 'Organization Name' will be listed here (not Energy Outreach Colorado).

5. Double click on your agency's 'Short Name' acronym to reveal the following:



- a. Your Hancock username
- b. Your first and last name
- c. Your agency's mailing address
- d. Your work email address
- e. A series of lowercase letters, numbers, and dashes that are autogenerated for every user. You do not need this information for Hancock use.

6. Scroll to the 'Users' section and click 'Add' as seen below:



Lists the total number of users (active or inactive) that have been created in your agency

To reveal the following:

A screenshot of a form titled 'Add/Edit Organization User'. The form has a close button (X) in the top right corner. It contains several input fields: 'Login Name *', 'Full Name *', 'Phone', 'Address', 'City', 'Password *', 'Email *', 'State', and 'External User ID'. There are also checkboxes for 'Inactive', 'Required Reset Password', and 'Unlock User'. At the bottom right, there is a green 'Save' button and a grey 'Cancel' button. A red box highlights the area between the 'Save' and 'Cancel' buttons, which is where error messages would appear.

Any errors in inputting new user data will appear in the area highlighted in red at the bottom right of this window

7. Create a 'Login Name*'
 - a. If the 'Login Name*' already exists in your organization or at a different organization, you will receive a red error message to the left of the 'Save' button
 - b. The first letter of the user's name, followed by their last name, is an easy way to come up with a 'Login Name*' for new users.
 - i. Other 'Login Name*' formats (as a work around for common names for a 'Login Name*' that already exists) could be:
 - j.smith
 - jsmith
 - jsmith1
 - j smith
 - c. Login names can only contain numbers, letters, a space, and/or a period.

8. Create a 'Password*'

- a. Hancock passwords must be at least 8 characters long, have at least one lower case letter, have at least one upper case letter, and have at least one special character (Example: !,^,&,\$,-,#)
 - b. It may be helpful to have one password for new users and require new users to create their own password when signing in for the first time.
 - i. Example: YourAgencyName'22!
9. Check off 'Required Reset Password' so that the new user will automatically be prompted to update their password upon their first login into Hancock.
- a. Having one universal password for all of your agencies Hancock users without selecting 'Required Reset Password' is a serious security threat, so you must **always** select 'Required Reset Password'.
10. Enter the user's full name.
11. Enter the user's work email.
- a. This is the email that will be used to reset a forgotten password, so if the user has a work email, a work email should be used to create their Hancock access.
12. Select the user's 'User Role' of 'EOC Bill Pay General User'.
13. Enter the users work phone number.
14. You can enter the address where this user works, but this is not required.
15. Click 'Save'. If there are any errors with the information inputted to create this new user, you will see a red error message to the right of the 'Save' button.

How to Disable a Hancock Users' Credentials

There are two ways to disable a Hancock users' credentials. You can make users who no longer work with your agency inactive or delete them from the Hancock system entirely. There is no maximum number of Hancock users that can be created, so if you prefer to track your agencies users over time, you can make them inactive. If you want your user list to exclusively be active users who are with your agency, you can remove old users.

Making a Hancock User Inactive

1. To make a user inactive and disable their access, double click anywhere inside the highlighted field, as seen below:

Login Name	Full Name	External User ID	Address	Zip	City	State	Email	Phone1	User Role	Active	User ID
thow.to	Testing How-to					CO	t.how-to@testing.org	860-944-8752	EOC Bill Pay General User	Yes	cb57ce41-4178-4ba8-afde-c5fa3851cc15

To reveal the following:

Add/Edit Organization User

Login Name *

Full Name *

Phone

Address

City

User Role *

New Password

External User ID

Inactive

Required Reset Password

Unlock User

Email *

ZIP

State

Field Role

Save **Cancel**

2. Check off the box under 'Inactive'
3. Click 'Save'

Add/Edit Organization User

Login Name *

Full Name *

Phone

Address

City

User Role *

New Password

External User ID

Inactive

Required Reset Password

Unlock User

Email *

ZIP

State

Field Role

Save **Cancel**

And your Hancock User list will update to the following:

Users											Add	Edit	Clear Search	Export	View 100 Rows	Total: 5
Login Name	Full Name ↓	External User ID	Address	Zip	City	State	Email	Phone1	User Role	Active	User ID					
thow.to	Testing How-to					CO	t.how-to@testing.org	860-944-8752	EOC Bill Pay General User	No	cb57ce41-4178-4ba8-afde-c5fa3851cc15					

Deleting a Hancock User

1. To delete a Hancock user, which also disables a Hancock users' access, simply click the trash can icon next to the user you want to delete, as seen below:

Users											Add	Edit	Clear Search	Export	View 100 Rows	Total: 5
Login Name	Full Name ↓	External User ID	Address	Zip	City	State	Email	Phone1	User Role	Active	User ID					
thow.to	Testing How-to					CO	t.how-to@testing.org	860-944-8752	EOC Bill Pay General User	Yes	cb57ce41-4178-4ba8-afde-c5fa3851cc15					

Where you will receive the following pop-up message appear:

Are you sure you want to delete this record?

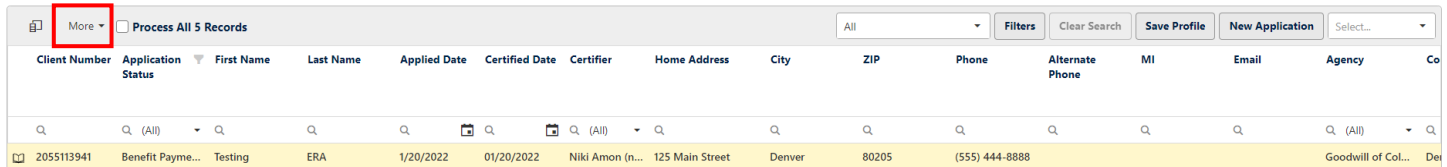
Yes
No

2. Click 'Yes' and the user you deleted will fall off your master list of users.

How to Delete an EOC Application from Hancock

Only EOC Program Liaisons and EOC Staff can delete applications from Hancock before a payment is approved. The user who originally created the application has the ability to edit the file, but only an EOC Program Liaison can completely delete the file before payment is made. Once paid, EOC Staff are the only people who can remove paid applications from Hancock.

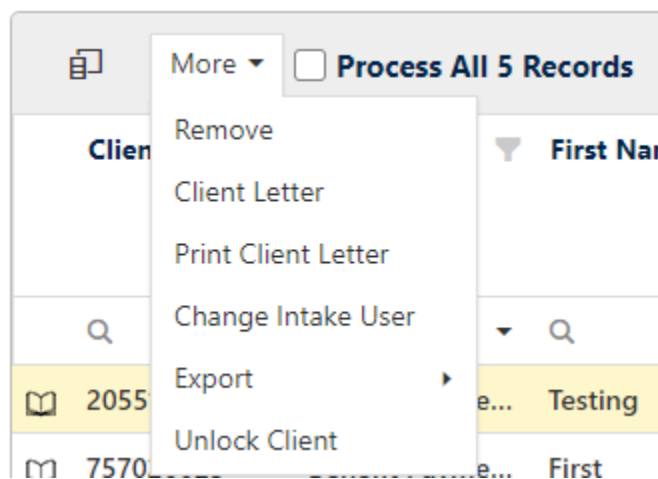
1. From the application tab of Hancock, click on the application you want to delete, which will highlight in yellow as seen below:



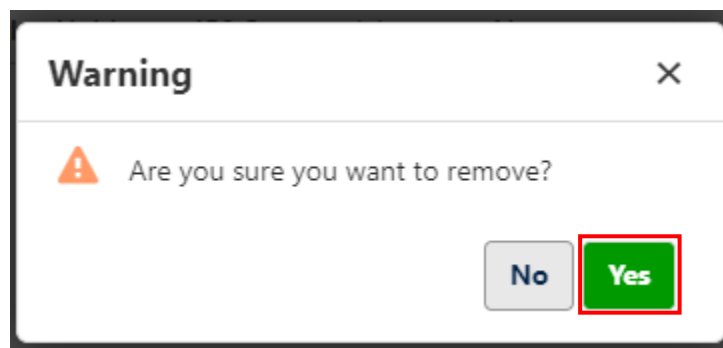
The screenshot shows a table of applications in Hancock. The 'More' dropdown menu is highlighted with a red box. The table has columns for Client Number, Application Status, First Name, Last Name, Applied Date, Certified Date, Certifier, Home Address, City, ZIP, Phone, Alternate Phone, MI, Email, and Agency. One application is highlighted in yellow.

Client Number	Application Status	First Name	Last Name	Applied Date	Certified Date	Certifier	Home Address	City	ZIP	Phone	Alternate Phone	MI	Email	Agency
2055113941	Benefit Payme...	Testing	ERA	1/20/2022	01/20/2022	Niki Amon (n...	125 Main Street	Denver	80205	(555) 444-8888				Goodwill of Col...

2. Click on the 'More' dropdown to reveal the following:



3. Click 'Remove' where the following warning pop-up will appear:



4. Click 'Yes' and the application will be removed from the Application page of Hancock.
 - a. Note: you cannot delete an application that has been paid. If the application has been certified and not paid, you can 'undo certify' the application, then remove the application.